

Create Your Own SmartList

Date: 04/11/2017

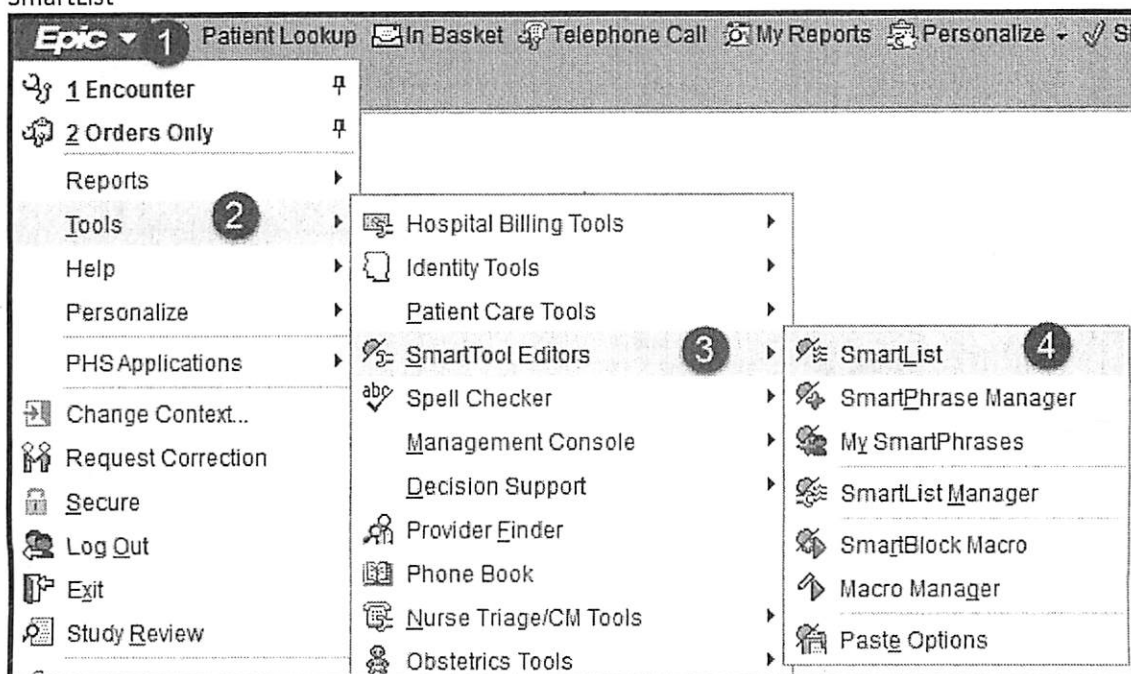
Create your own SmartList: Explanation

Ambulatory Providers and Midlevels can create their own SmartLists. In the system, there are four blank templates that they can use as a starting point.

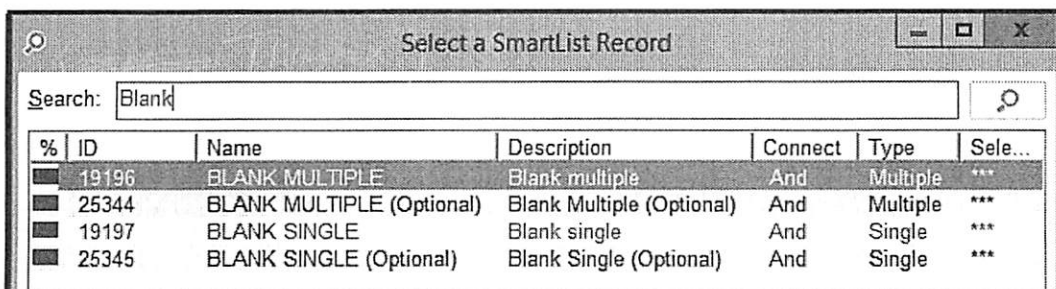
Note: The Optional records allow providers to sign/close a note without resolving/completing the SmartList.

Try It Out – User Workflow

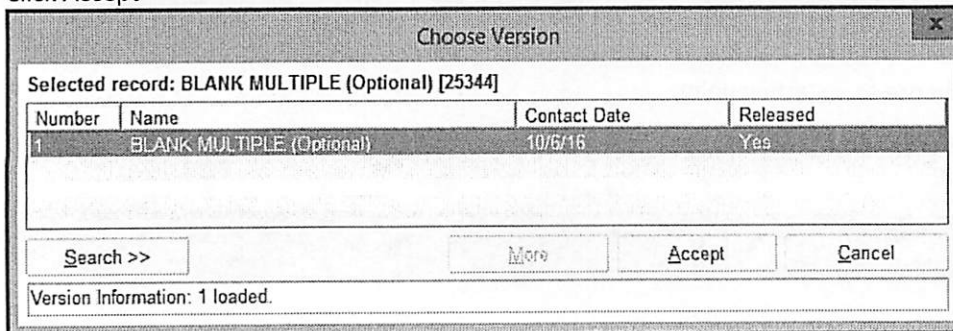
1. Go to your Epic Button
2. Tools
3. SmartTools Editor
4. SmartList



5. Search for a blank template and choose which one you'd like to use



6. Click Accept



Choose Version

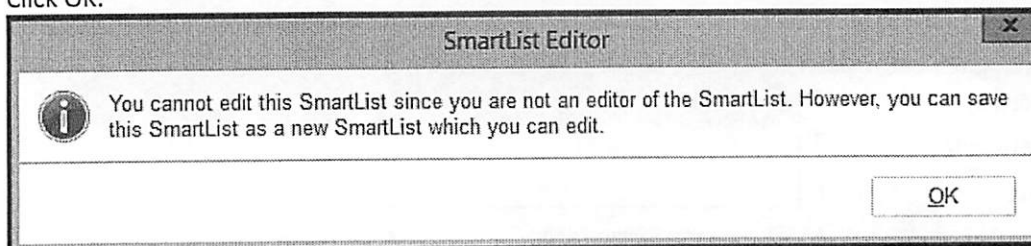
Selected record: BLANK MULTIPLE (Optional) [25344]

Number	Name	Contact Date	Released
1	BLANK MULTIPLE (Optional)	10/6/16	Yes


Search >> More Accept Cancel

Version Information: 1 loaded.

7. Once you click Accept you'll be brought in to the record and prompted with a warning message > Click OK.

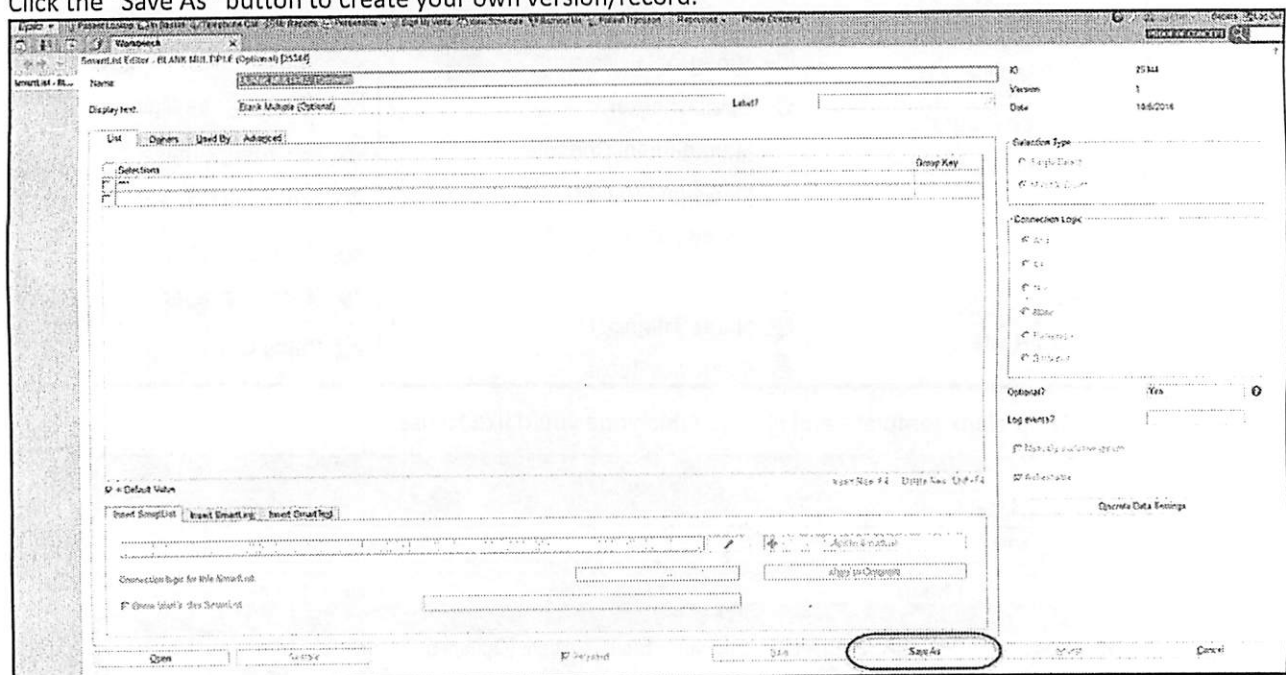


SmartList Editor

 You cannot edit this SmartList since you are not an editor of the SmartList. However, you can save this SmartList as a new SmartList which you can edit.

OK

8. Click the "Save As" button to create your own version/record.



SmartList Editor - BLANK MULTIPLE (Optional) [25344]

Name: BLANK MULTIPLE (Optional) List? Display text: Blank Multiple (Optional)

List: Columns: Used By: Advanced: Group Key

Selections: [Empty list]

Default Value: [Empty field]

Print SmartList Insert SmartList Insert SmartList

Connection type for this SmartList: [Empty field]

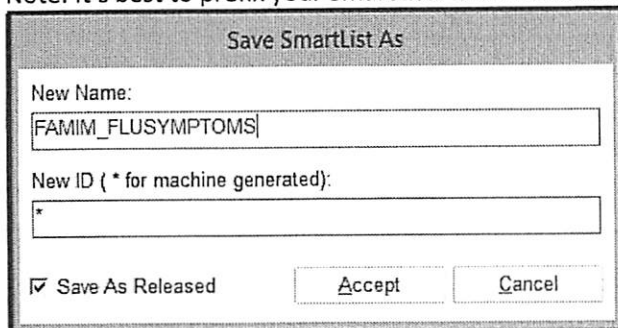
Optional? Yes 0 Log name? [Empty field]

Open Data Settings

Save As

9. Give your SmartList a Name and leave the other items as is

Note: It's best to prefix your SmartLists with the same text so you can search for them easily



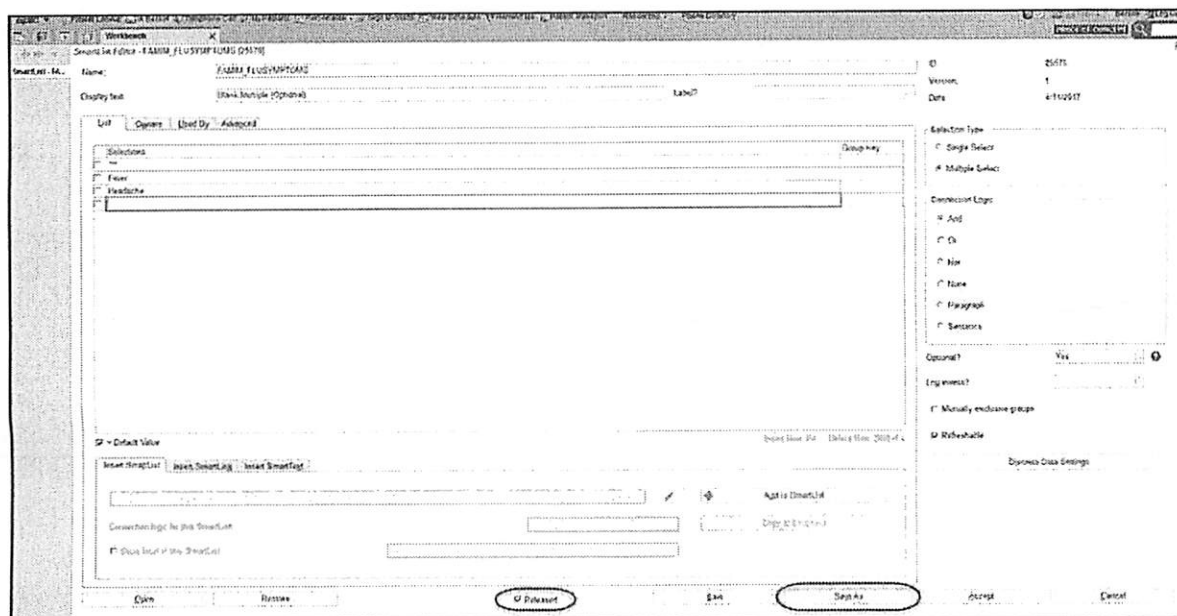
Save SmartList As

New Name:

New ID (* for machine generated):

☒ Save As Released

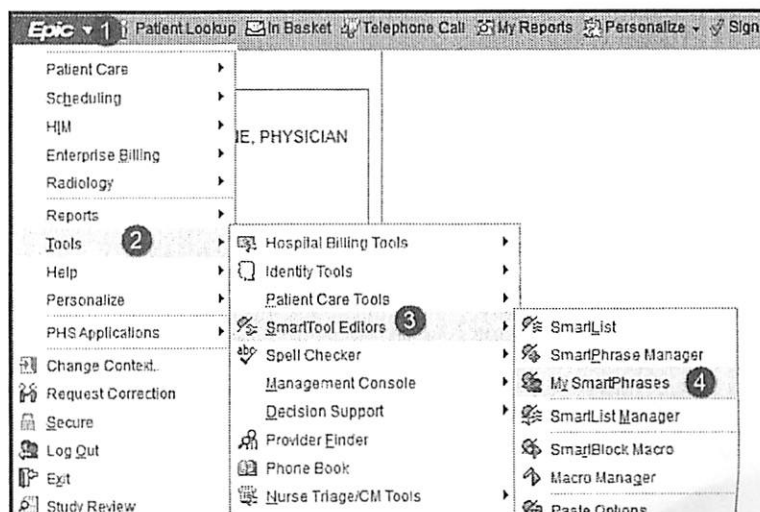
10. From there you can make your list and click Accept. Please be sure that the Released box is checked off. This allows for you to search/pull in your new SmartList when entering a note.



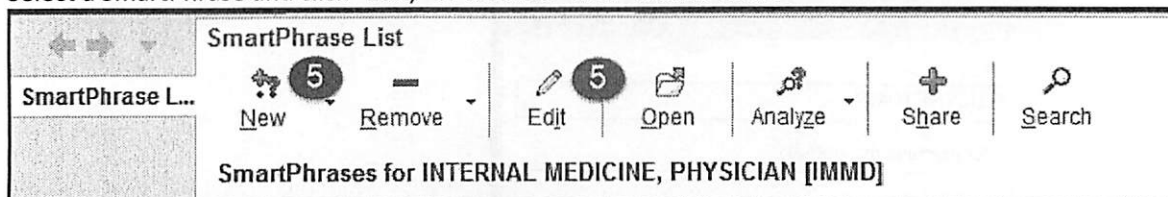
The screenshot shows the SmartList Editor window. The 'Name' field contains 'FAMIM_FLUSYMPOMS'. The 'New ID' field contains '*'. The 'Save As Released' checkbox is checked. The 'Accept' button is highlighted.

Add your SmartList to a SmartPhrase

1. Select Epic Button
2. Tools
3. SmartTool Editor
4. Navigate to "My SmartPhrases"



5. Select a SmartPhrase and click "Edit," or create a "New" SmartPhrase



6. Search for the Smartlist that was created: FAMIM_FLUSYMPTONS
7. Place the cursor in the body of the SmartPhrase where you would like to insert the SmartList
8. Click the Add to SmartPhrase in order to put the Smart list where the cursor is placed
9. The SmartList should now populate in the body of the SmartPhrase.
10. Select F2 to instigate the list.
11. Name of the SmartPhrase

