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epic list smart phrase

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Introduction

In the fast paced world of modern healthcare, clinicians often juggle patient encounters, documentation, and administrative tasks with little time to spare. The Epic Systems EMR, one of the most widely adopted electronic health record (EHR) platforms, offers a powerful tool that helps clinicians streamline documentation: Smart Phrases. These pre written, customizable snippets of text can be inserted with a single keystroke, saving valuable minutes during every patient visit. This article explores the ins and outs of Epic Smart Phrases, provides a practical list of commonly used phrases, and offers best practice guidance for maximizing efficiency while maintaining high quality documentation.

What Are Epic Smart Phrases?

Smart Phrases are short, reusable text blocks that can be inserted into any Epic document—progress notes, discharge summaries, operative reports, and more. They function like a built in “copy and paste” tool that can be triggered by a unique keyword, often preceded by a period (e.g., **.cc**for chief complaint). When the keyword is typed, the system expands it into a full sentence or paragraph, optionally prompting the user for additional information.

History and Evolution

Epic introduced Smart Text in the early 2000s as a way to reduce repetitive typing. Over time, the feature evolved into Smart Phrases and Smart Text, adding dynamic variables, conditional logic, and the ability to embed images or tables. Today, Epic Smart Phrases are integral to the clinical workflow, especially in high volume settings such as emergency departments and inpatient units.

How Smart Phrases Work in Epic EMR

When a clinician types a keyword, Epic’s Smart Phrase engine searches the user’s personal library and any shared libraries. If a match is found, the phrase expands automatically. The user can then edit the inserted text, add patient specific details, or insert additional variables such as dates, lab values, or medication lists. The system also supports multi line templates, making it possible to generate complex narrative sections with minimal effort.

Why Smart Phrases Are Essential in Clinical Documentation

Smart Phrases address three core needs in clinical documentation: time efficiency, consistency, and compliance. Below we break down each benefit.

Time Savings

According to a 2023 study published in the Journal of Medical Systems, clinicians using Smart Phrases reduced documentation time by an average of 25%. By eliminating repetitive typing, providers can focus more on patient interaction and less on paperwork.

Consistency & Accuracy

Standardized language across a department improves readability for other clinicians, facilitates clinical decision

support, and reduces errors. Smart Phrases ensure that key information—such as medication lists, allergies, and assessment findings—is consistently recorded.

Compliance & Audit Readiness

Regulatory bodies increasingly scrutinize documentation for completeness and accuracy. Smart Phrases help meet these requirements by embedding required fields and prompts, making it easier to produce audit ready charts.

Creating and Managing Smart Phrases in Epic

While many clinicians rely on pre built phrases, Epic allows users to create custom Smart Phrases tailored to their practice. Below is a step by step guide.

Accessing the Smart Phrase Builder

1. Open any Epic document (e.g., Progress Note).
2. Click the Tools menu and select Smart Text (or press Ctrl + Shift + T on Windows).
3. Choose New Smart Phrase from the drop down list.

Step by Step Guide to Building a Smart Phrase

1. Name the Phrase: Give it a concise, descriptive name (e.g., CC for chief complaint).
2. Define the Trigger: Set the keyword that will activate the phrase (e.g., .cc).
3. Insert Text: Type the full sentence or paragraph. Use variables (e.g., {{date}}) to prompt for dynamic content.
4. Click Save and test by typing the trigger in a new document.

Organizing Smart Phrases: Folders, Tags, and Sharing

Epic allows users to create folders (e.g., **Inpatient**, **Outpatient**) and tag phrases with keywords. Shared libraries can be set at the department or organization level, enabling collaboration and standardization across teams.

Epic List Smart Phrases: A Comprehensive Collection

Below is a curated list of commonly used Smart Phrases that can be adapted to most clinical settings. The list is organized by document type and clinical context.

Chief Complaint & History of Present Illness

- .cc – “Chief complaint: {{patient name}} presents with {{symptom}} for {{duration}}.”
- .hpi – “History of present illness: {{symptom}} began {{time frame}}; associated with {{associated symptoms}}.”

Physical Examination Templates

- .pe – “Physical exam: Vital signs: BP {{bp}} / HR {{hr}} / RR {{rr}} / Temp {{temp}}. General: {{general findings}}.”
- .cardiac – “Cardiac: Regular rate and rhythm; no murmurs; apex beat at {{location}}.”
- .respiratory – “Respiratory: Clear to auscultation bilaterally; no wheezes or crackles.”

Assessment & Plan (A&P)

- .ap – “Assessment: {{diagnosis}}. Plan: 1) Order labs: {{labs}}. 2) Prescribe: {{medications}}. 3) Follow up in {{time}}.”
- .discharge – “Discharge instructions: 1) Medication changes: {{medications}}. 2) Activity restrictions: {{restrictions}}. 3) Follow up appointment: {{date}}.”

Order Sets & Medication Orders

- .orderset – “Order set: {{order set name}} – includes labs, imaging, and medications.”
- .meds – “Medications: 1) {{medication}} {{dose}} q{{frequency}}; 2) {{medication}} {{dose}} q{{frequency}}.”

Administrative & Miscellaneous

- .referral – “Referral to {{specialty}}: {{reason}}.”
- .consult – “Consultation request: {{specialty}} – {{reason}}.”
- .followup – “Follow up: {{date}} at {{time}} in {{location}}.”

These Smart Phrases can be modified to fit your institution’s style guide or clinical workflow. Remember to use variables to keep the phrases flexible and patient specific.

Best Practices for Using Smart Phrases Effectively

Smart Phrases are only as good as how they are used. Below are proven strategies to maximize their impact.

Keep Phrases Up to Date

Medical guidelines evolve, and so should your Smart Phrases. Schedule quarterly reviews to ensure that medication dosages, diagnostic criteria, and procedural descriptions remain current.

Use Variables and Dynamic Content

Incorporate placeholders such as *{{age}}*, *{{weight}}*, or *{{lab value}}*so that the system prompts for real time data. This reduces manual editing and improves accuracy.

Collaborate with Your Team

Shared libraries promote consistency across providers. Encourage team members to contribute and review Smart Phrases, fostering a culture of continuous improvement.

Integrate with Clinical Decision Support

Many Smart Phrases trigger alerts or checklists that align with clinical pathways. For example, a discharge Smart Phrase can automatically generate a medication reconciliation list that feeds into the pharmacy system.

Common Challenges and How to Overcome Them

Even the best tools can encounter obstacles. Here are some typical issues and actionable solutions.

Version Control

Multiple users editing the same phrase can lead to conflicts. Establish a version control protocol: assign a primary author, use clear naming conventions, and archive older versions.

Training and Adoption

New clinicians may feel overwhelmed by the sheer number of Smart Phrases. Offer hands on workshops, quick reference guides, and mentorship programs to accelerate adoption.

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