



TEMPLATE (EPIC) SYNOPTIC OPERATIVE REPORT

2020- Hernia Pilot

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Hernia Synoptic Operative Note

Epic SmartPhrase Creation Guide

Introduction

Thank you for participating in the synoptic hernia op note initiative. The following instructions will detail how to create a more powerful and efficient synoptic hernia operative note using Epic software functionality. The following guide was created for the express purposes of this pilot and should not be used, adapted, or transmitted for any other purpose or reason.

Images and instructions in this guide we're abstracted from a single institution's Epic Software package. Certain images and text may have been edited to prevent unnecessary disclosures of information. User experience and Epic functionality may vary by institution. Contact your Information Technology Service provider for questions relating to functionality and software access.

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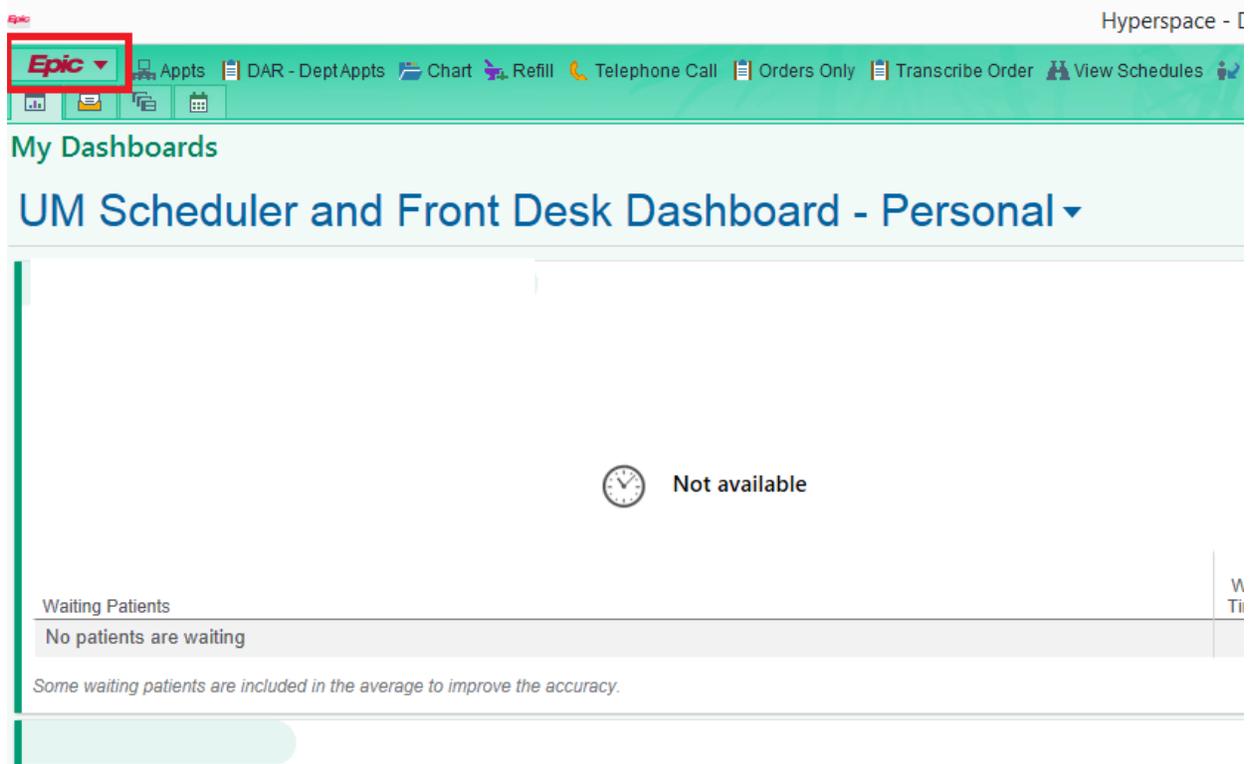
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Step 1: Navigating to the Smartphrase Editor

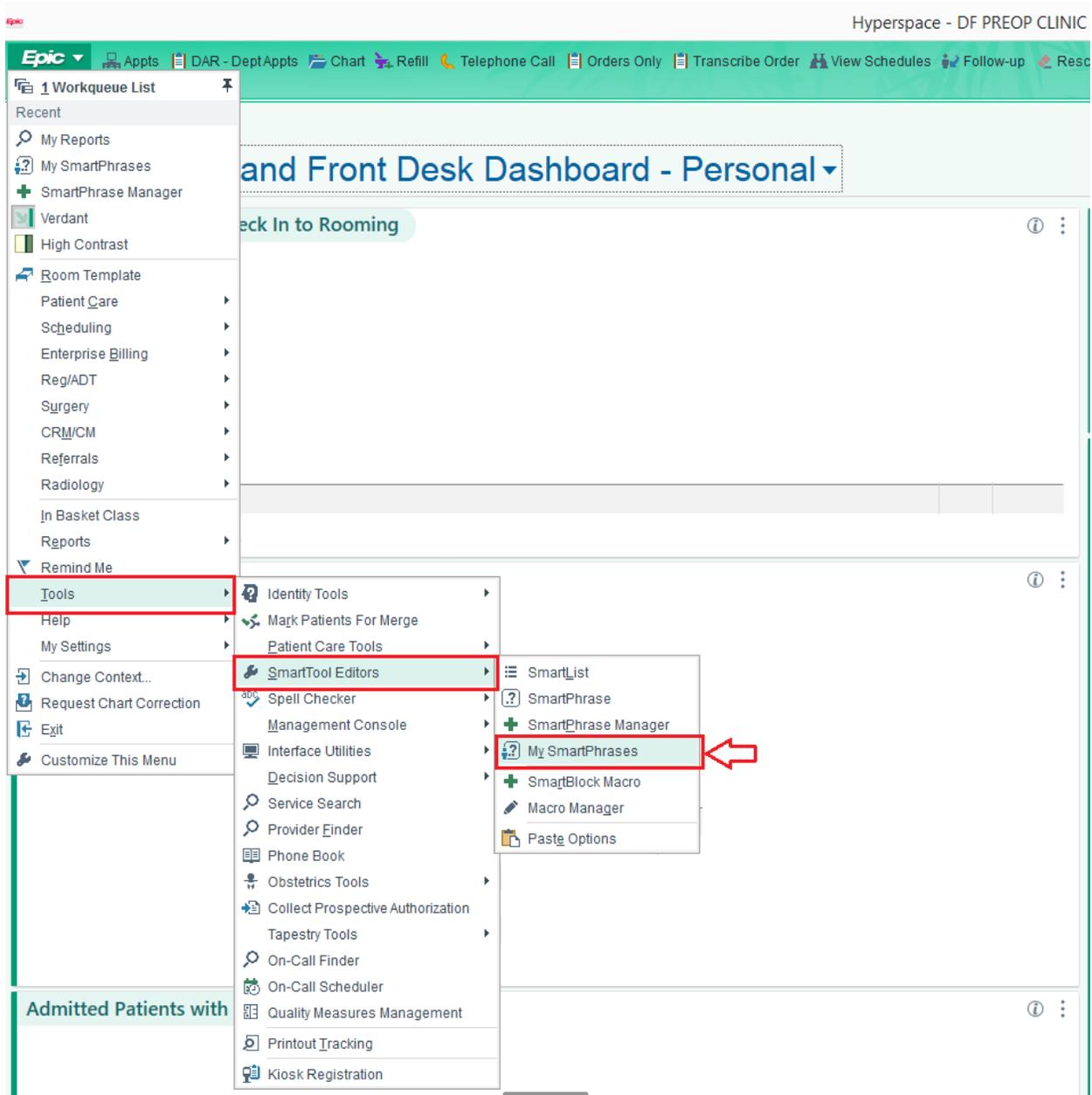


1. Open your Epic computer application and click the Epic Dropdown menu button in the top left corner of your screen.



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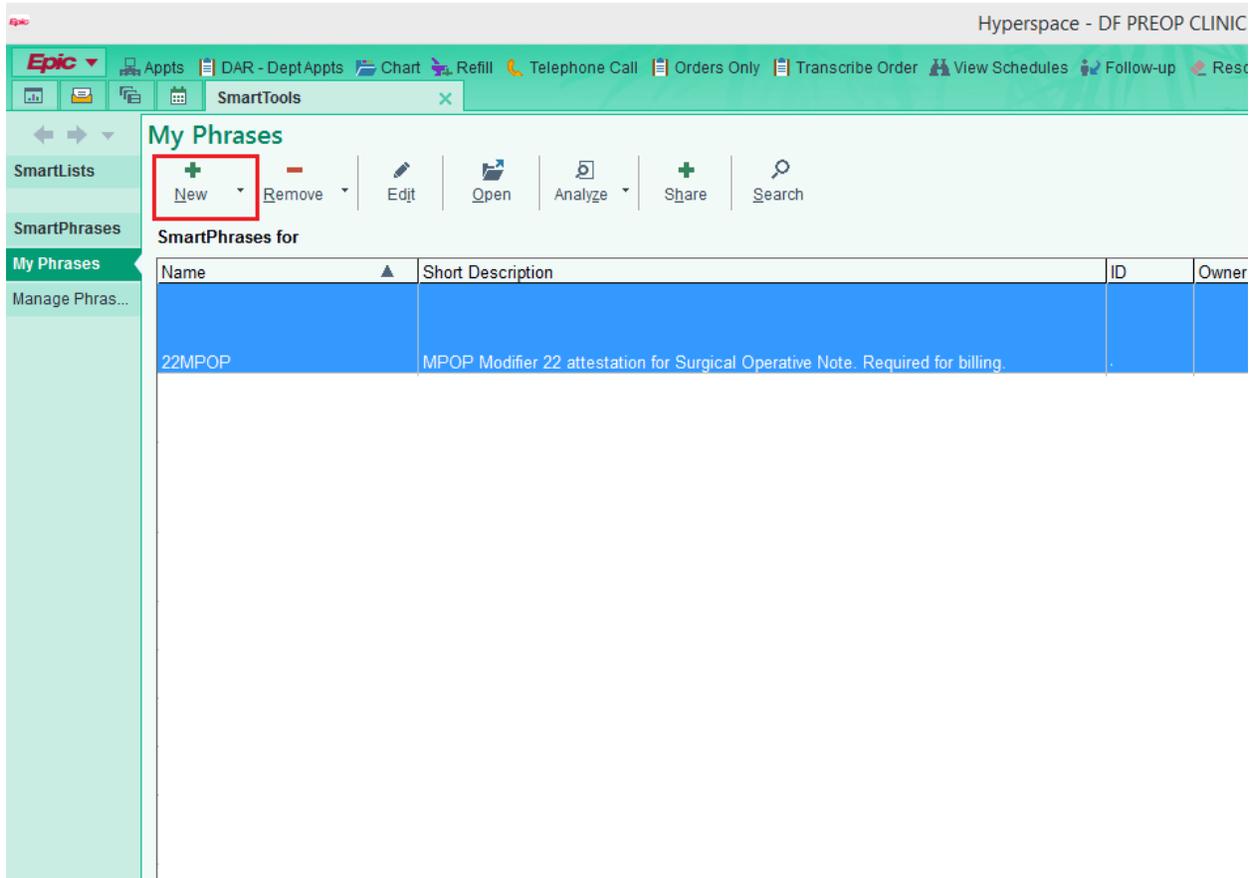
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2. In the dropdown menu, place your mouse over “Tools” > “SmartTool Editors” > and click “My SmartPhrases”

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The screenshot displays the Epic SmartTools interface. At the top, the title bar reads "Hyperspace - DF PREOP CLINIC". Below this is a navigation bar with various icons and labels: "Epic", "Apts", "DAR - Dept Apts", "Chart", "Refill", "Telephone Call", "Orders Only", "Transcribe Order", "View Schedules", "Follow-up", and "Resc". A "SmartTools" window is open, showing the "My Phrases" section. The "New" button is highlighted with a red box. Below the navigation bar, there are icons for "Remove", "Edit", "Open", "Analyze", "Share", and "Search". The main area is titled "SmartPhrases for" and contains a table with the following data:

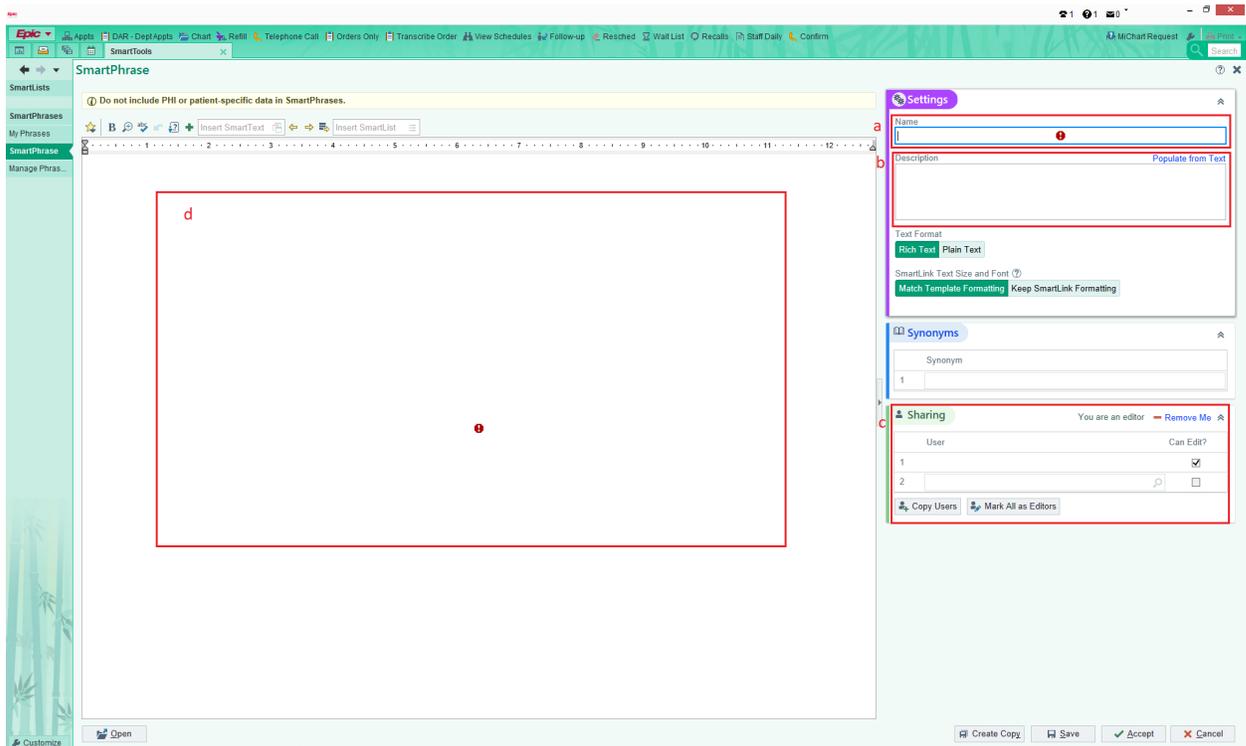
Name	Short Description	ID	Owner
22MPOP	MPOP Modifier 22 attestation for Surgical Operative Note. Required for billing.		

3. You are now viewing your personal SmartPhrase manager. This window will allow you to create, view, and edit your personal SmartPhrases. To create the Synoptic Hernia Op Note, click on the "New" button in the top left.

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Step 2: Creating the Synoptic OP-Note Smartphrase



4. Smartphrase Editor Overview: This is the window in which you create and edit a specific SmartPhrase
 - a. **Name** – choose a name for your SmartPhrase! This is the “phrase” that users will type to populate the note’s text (e.g., if your Smartphrase was named “hernia,” users would type “.hernia” to use the phrase). It is important to make this name simple, descriptive, and memorable. In our example, we will use “HERNIAOPNOTE”
 - b. **Description** – write a brief description for your phrase. This description will help users differentiate multiple SmartPhrases that share similar names. In this example: we will use: “Synoptic operative note template for hernia repair.”
 - c. **Sharing** – Insert the names of users with whom you would like to share your phrase. If you would like to allow a specific user to be able to edit the text and functionality of your phrase, click the box under the “Can Edit?” heading, next to their name. Be careful to whom you grant editing privileges; it is good practice to only grant editing privileges upon request. **DO NOT SHARE YOUR SMARTPHRASE UNTIL IT IS COMPLETE AND TESTED.** Sharing your Smartphrase will be the last step [cert] of this guide.
 - d. **Text editing space** – this is the space in which you will enter the text you would like your SmartPhrase to populate.

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Step 3: Paste the Synoptic OP-Note Template

Instructions: Copy (LCtrl+c) and paste (LCtrl+v) this note directly into the Smartphrase editor's text editing space (d. above). Verify that the text formatting appears as desired. The embedded images will likely need correcting. Do not delete any bullets or text; you will add more to the note in a moment.

Synoptic Operative Note: Hernia

Patient Name:

MRN:

DOB:

Age:

Gender:

Date:

Acct:

Provider Name:

Record of Operation

-

Diagnosis and Procedure:

Pre-operative Diagnosis:

Postoperative Diagnosis:

Anesthesia: [ANESTHESIA]

Procedure:

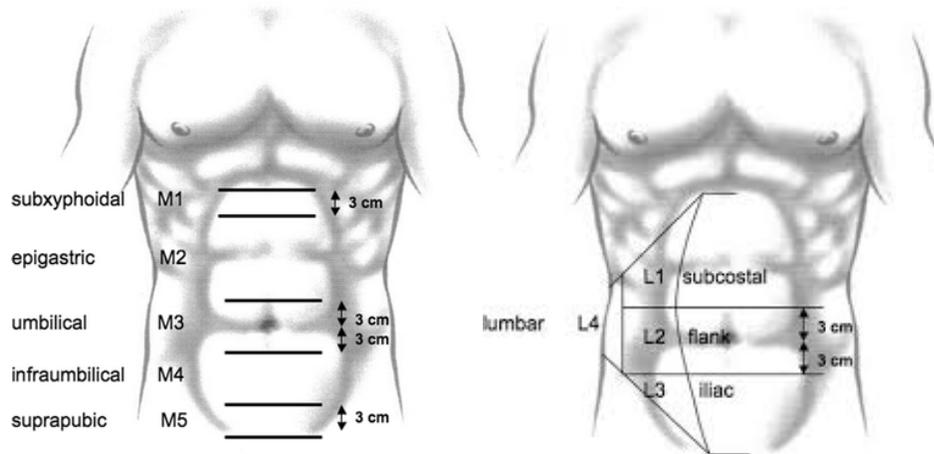
- [APPROACH] [HERNIA PROCEDURE SELECT] Hernia Repair
- Component separation: [YES/NO]
- [ANT/POST]

Operative Findings:

- Hernia characteristics
 - Recurrent: [YES/NO] Number of previous repairs: ***
 - Hernia length (cm): ***
 - Hernia width (cm): ***
 - Location: [Hernia Location]

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Procedure Details:

Wound classification: [WOUND CLASS]

Abdominal Entry

- *Patient prep and position* - The patient was placed in the [SUPINE OR LATERAL] position. Venodynes were placed and the patient was prepped and draped in standard sterile fashion.
- *Operative Approach:* [OPERATIVE APPROACH]
- Adhesiolysis (min) ***
- Excision of old mesh: [EXCISION OF OLD MESH]

Hernia repair:

- Mesh used: [YES/NO]
- Mesh location: [MESH LOCATION]
- Mesh size (cm): ***
- Type of mesh: [TYPE OF MESH] Brand of mesh: ***
- Mesh fixation (pick all that apply): [MESH FIXATION]
- Fascia closed: [YES/NO]



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Pathology (free text):

- Specimens sent:

Fluids:

- EBL (mL): ***

Closure:

- Drains (# and location): ***
- Fascial closure: [FASCIAL CLOSURE]
- Skin closure: [SKIN CLOSURE]
- Sponge and instrument count correct: Yes
- Complications: No***
- I was present for the entire procedure: Yes***

Step 4: SmartPhrase Example

The screenshot displays the Epic SmartPhrase creation interface for a hernia repair. The main window is titled "User SmartPhrase - HERNIAOPNOTE". The interface includes a top navigation bar with various application icons and a search bar. The main content area is divided into several sections:

- Patient Information:** Fields for Patient Name, MRN, DOB, Age, Gender, Date, Acct, and Provider Name.
- Record of Operation:** A dropdown menu.
- Diagnosis and Procedure:** Fields for Pre-operative Diagnosis, Postoperative Diagnosis, Anesthesia: [ANESTHESIA], and Procedure: [APPROACH] [HERNIA PROCEDURE SELECT] Hernia Repair.
- Operative Findings:** A list of findings including Hernia characteristics, Recurrent: [YES/NO] Number of previous repairs: ***, Hernia length (cm): ***, Hernia width (cm): ***, and Location: [].

Below the Operative Findings section is a diagram of the abdominal wall showing the L4, L5, and Iliac regions. The right sidebar contains the following sections:

- Settings:** Fields for Name (HERNIAOPNOTE) and Description (Synoptic operative note template for hernia repair). It also includes options for Text Format (Rich Text, Plain Text), SmartLink Text Size and Font, and Match Template Formatting.
- Synonyms:** A section for adding synonyms.
- Sharing:** A section for sharing the SmartPhrase, including a table for users and their edit permissions.

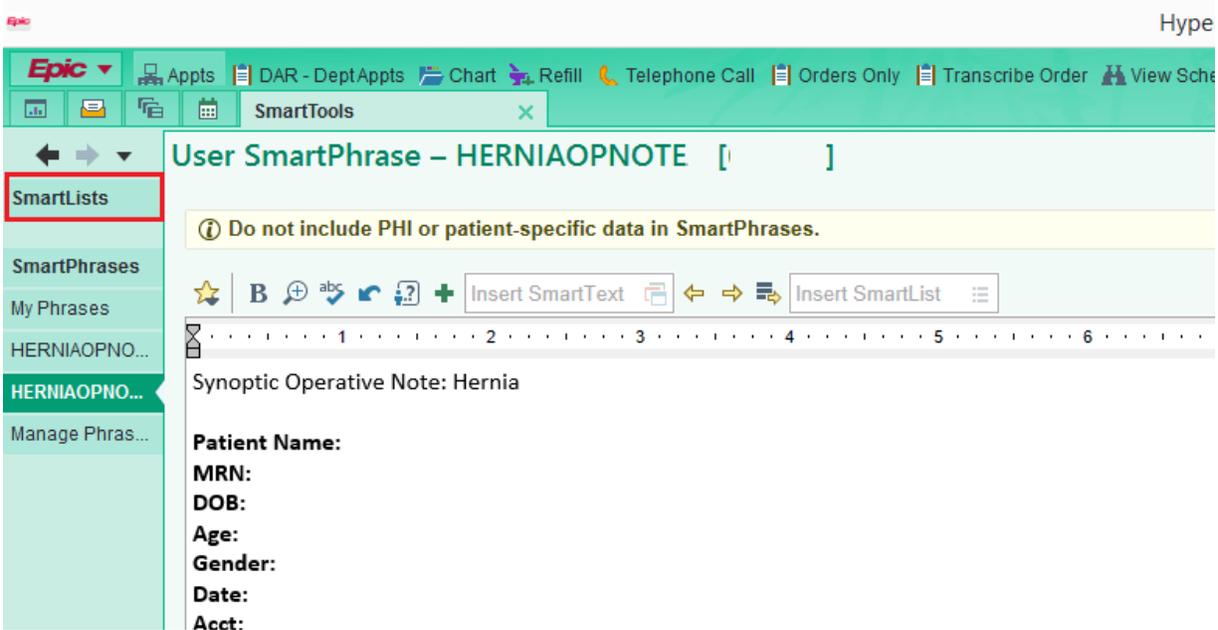
At the bottom of the window, there are buttons for "Create Copy", "Save", "Accept", and "Cancel". The "Save" button is highlighted with a red box.

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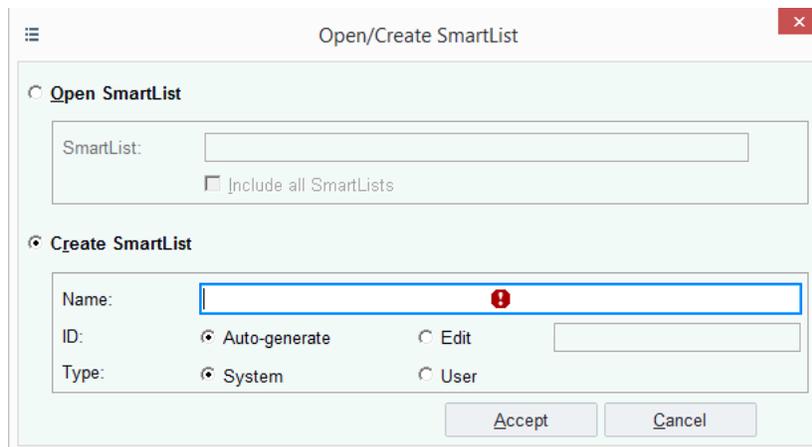
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If you have followed the instructions to this point, your SmartPhrase should have a title, description, and the note template should be pasted in the navigator with any preliminary formatting adjustments complete. Press the “Save” button in the bottom left corner. You do not need to close this page; we will return in a moment.

Step 5: Creating SmartLists – Walkthrough Example



1. From the SmartPhrase editor, you may be able to navigate to the SmartList Creator by clicking the button in the top left of your window. If not, [follow the instructions \(ctrl+click this link\)](#) you used to navigate to “My SmartPhrases,” but click “SmartLists” instead of “My SmartPhrases.”



2. You should now see this pop-up. Select “Create SmartList.”

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Open/Create SmartList

Open SmartList

SmartList:

Include all SmartLists

Create SmartList

Name:

ID: Auto-generate Edit

Type: System User

3. Name your first SmartList "Yes/No". Set the "ID" and "Type" as above (it may be defaulted to those values). All SmartLists that you create for the Synoptic Op-Note should be "System" SmartLists.
4. Click Accept.

Open/Create SmartList

Open SmartList

SmartList:

Create SmartList

Name:

ID: Auto-generate Edit

Type: System User

Hyperspace

There is an existing SmartList named Yes/No.
Do you want to create a new SmartList with this name?

5. You may encounter this messaging when creating SmartLists. Click "Create." Epic will generate a unique ID for your SmartList so that it does not interfere with others, and vice-versa.

Choose Version

Selected record: Yes/No [46339]

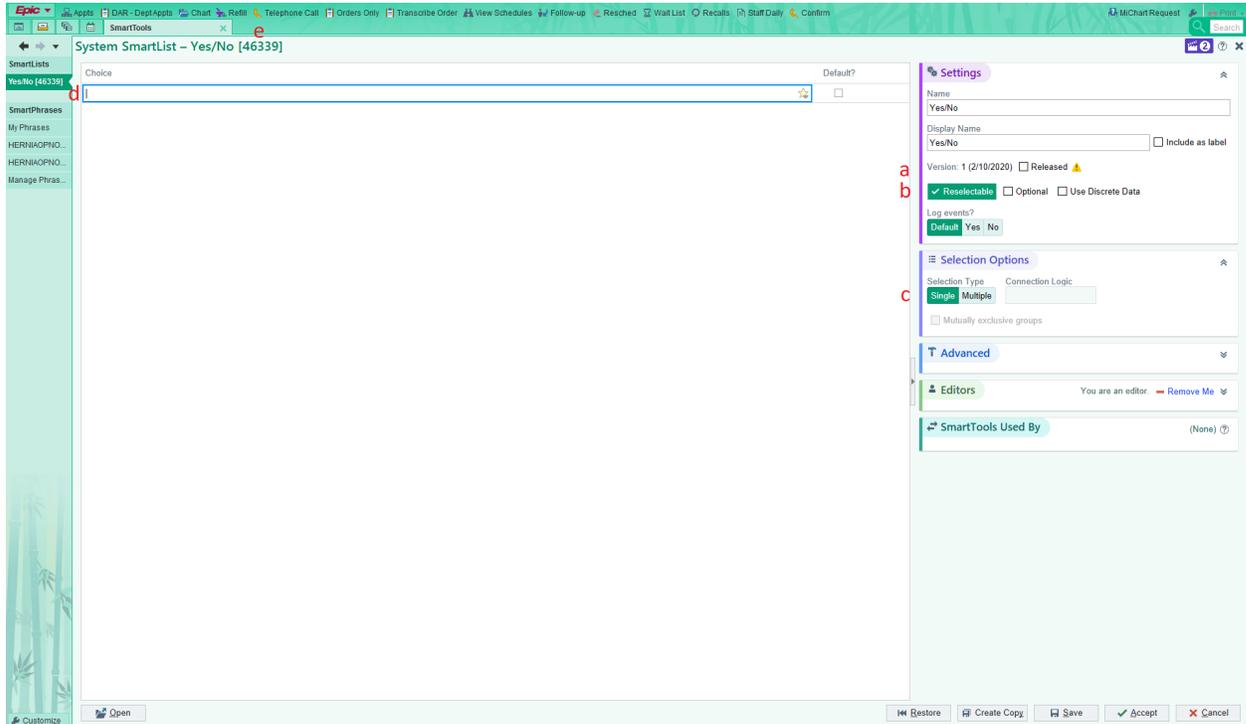
Number	Name	Contact Date	Released
1	Yes/No	2/10/20	

Version Information: 1 loaded.

6. Select the latest version (in this case there is only one option), and Click Accept.

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7. Welcome to the SmartList editor! Familiarize yourself with this tool!
 - a. **Version** – Lists the current version you are editing. Press the button Next to “Released” to make this list public. **YOUR SMARTLIST WILL NOT BE USABLE BY ANYONE UNTIL YOU CLICK THIS BOX. MAKE SURE YOU DO THIS ON EVERY SMARTLIST YOU CREATE.**
 - b. **Functionality Options** – these options dictate how users may interact with your SmartList. You will not need to utilize these options for the Hernia Op Note. All SmartLists you create should follow the default options shown above.
 - i. **Reselectable** – allows users to reselect options from the SmartList once they have already selected an option. This item should always be checked.
 - ii. **Optional** – optional SmartLists do not require selections and, if left unselected, are removed from some notes when signed.
 - iii. **Use Discrete Data** – allows users to enter discrete values in the SmartList option.
 - c. **Selection Type** – dictates whether users may select only one or multiple items from the SmartList.
 - d. **Choice** – this is where you will enter the list options. Some may have one or two options; others may have many. Remember: SmartLists simplify data entry by allowing the user to quickly navigate a note template and click (instead of type) variables in the exact places where data entry is necessary. “Choices” will be the text or variable that users click to input that text string into their note.
 - e. **Unique ID** – This is the unique ID that is generated when you create a new SmartList. Your Unique ID’s will be different than the examples in this guide, even though the SmartList names are the same. **IMPORTANT:** Record your SmartList name and Unique ID to ensure you will be able to find it during later steps of this guide.

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System SmartList – Yes/No [46339]

Choice

Choice	Default?
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

Settings

Name: Yes/No

Display Name: Yes/No Include as label

Version: Released Reselectable Optional Use Discrete Data

Log events? Yes No

Selection Options

Selection Type: Single Multiple Mutually exclusive groups

Advanced

Editors: You are an editor.

SmartTools Used By: (None)

- Now that you are familiar with the SmartList editor, enter the list choices. For the Yes/No List you will enter two choices...type “Yes” and type “No.” Do not default any options.
- Click Save.
- MAKE SURE YOU HAVE CLICKED THE BOX NEXT TO “RELEASED!”**
- Click “Accept” in the bottom right corner.
- Your first SmartList is complete!

Step 6: Creating SmartLists – Instructions

The following section will list abbreviated instructions for the remaining Op Note SmartLists you need to create. Each SmartList instruction will start with a recommended Name, followed by the selection options you need to select for each list. All setting and options not mentioned should be left as default. Refer back to [Step 5](#) if you get lost or do not recognize certain nomenclature.

Example (You should have already completed this in [Step 5](#))

Name: Yes/No

Selection Options: Single

Choices:

Yes

No

Name: Anesthesia

Selection Options: Single

Choices:

General

Sedation

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Name: Approach

Selection Options: Single

Choices:

Open

Laparoscopic

Robotic

Name: Hernia Procedure Select

Selection Options: Single

Choices:

Ventral

Incisional

Recurrent Incisional

Umbilical

Epigastric

Suprapubic

Subcostal

Flank

Inguinal

Parastomal

Name: ANT/POST

Selection Options: Single

Choices:

Anterior

Posterior (Transversus Abdominis Muscle Release, Tar)

None

Name: Hernia Location

Selection Options: **Multiple (Connection Logic: And)**

Choices:

M1

M2

M3

M4

M5

L1

L2

L3

L4

Inguinal – Left

Inguinal – Right

Inguinal – Bilateral

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Name: Wound Class

Selection Options: Single

Choices:

Clean

Clean-Contaminated

Contaminated

Dirty

Name: Supine or Lateral

Selection Options: Single

Choices:

Supine

Lateral

Name: Operative Approach

Selection Options: Single

Choices:

Laparotomy

Laparoscopy

Robotic

Name: Excision of Old Mesh

Selection Options: Single

Choices:

None

Partial

Complete

Name: Mesh Location

Selection Options: Single

Choices:

Onlay

Inlay

Retrorectus/retromuscular

Preperitoneal

Underlay (intraperitoneal)

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Name: Type of Mesh

Selection Options: Single

Choices:

Synthetic

Biosynthetic

Biologic

Vicryl

Name: Mesh Fixation

Selection Options: **Multiple (Connection Logic: And)**

Choices:

Suture

Fibrin Glue

Absorbable Tacks

Non-absorbable Tacks

Other:

Name: Fascial Closure

Selection Options: Single

Choices:

No

Interrupted. Suture Used: ***

Running. Suture Used: ***

Name: Skin Closure

Selection Options: Single

Choices:

Staples

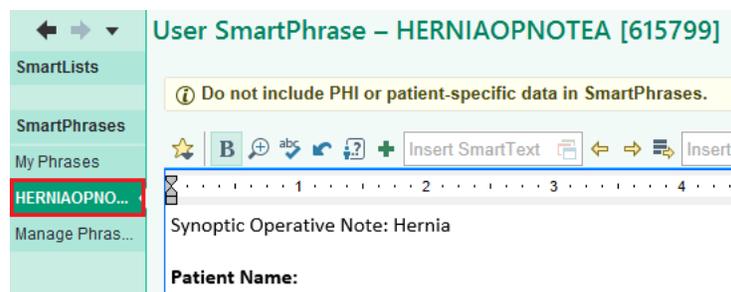
Suture

Step 7: Embedding SmartLists in the SmartPhrase

Now that you have created all the necessary SmartLists, it is time to insert them into the SmartPhrase.

Return to your Synoptic Op Note SmartPhrase editor. You may do this by either:

- a. Selecting your note (if it is still open) from the menu on the left



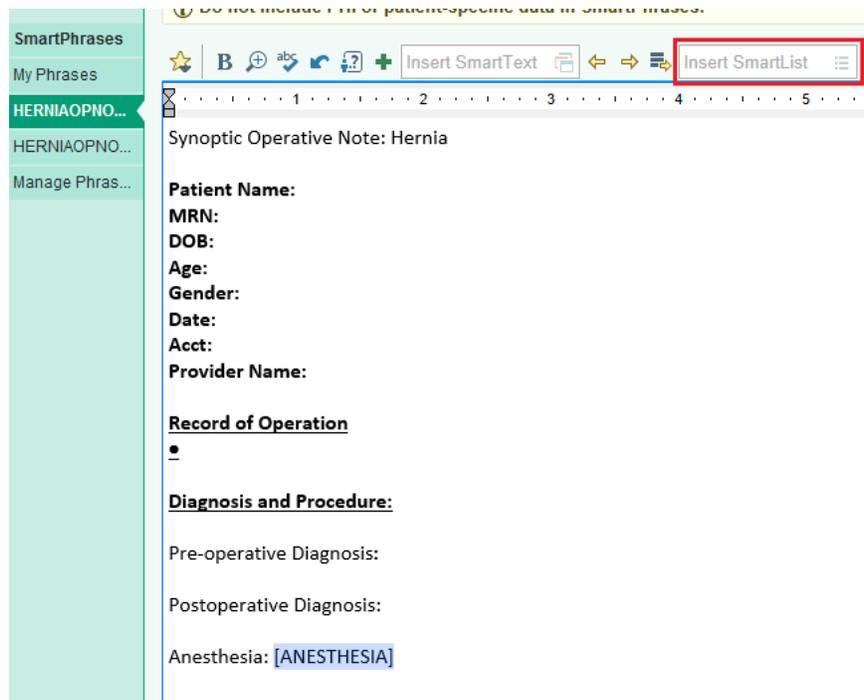
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- b. Or by following the [instructions for navigating to "My SmartPhrases."](#) Once in the smartphrase manager, select your phrase from the list.

When you return to the SmartPhrase editor, replace all [Bracketed] texts with their corresponding SmartLists. To insert a SmartList:

1. Highlight the [Bracketed] text.
2. Then, in the "Insert SmartList" field, search for your SmartList by either the Name or [Unique ID](#) Number that you should have recorded for the corresponding [Bracketed] text. Type the Name or Unique ID and press the Enter Key on your keyboard.



3. Type the Name or Unique ID and press the Enter Key on your keyboard.

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The screenshot shows the 'SmartList Lookup' window. At the top, there is a search bar containing the ID '46342'. Below the search bar, a 'Matches' section on the left lists 'Anesthesia'. To the right of this list, the word 'Anesthesia' is displayed in blue. Below the word, there is a checkbox labeled 'Include as label' which is currently unchecked. To the right of this checkbox is a text input field containing the word 'Anesthesia'. Below these elements is a table with two columns: 'Default?' and 'Choice'. The table contains two rows: one with a radio button and the text 'General', and another with a radio button and the text 'Sedation'. At the bottom left of the window is a 'Restore' button with a left-pointing arrow. At the bottom right are two buttons: 'Accept' with a green checkmark icon and 'Cancel' with a red X icon.

4. Select your phrase from the Menu on the left (in this case there's only one option because we used the unique ID).
5. Press Accept

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User SmartPhrase – HERNIAOPNOTE [615799]

Do not include PHI or patient-specific data in SmartPhrases.

SmartLists

SmartPhrases

My Phrases

HERNIAOPNO...

Manage Phras...

Synoptic Operative Note: Hernia

Patient Name:

MRN:

DOB:

Age:

Gender:

Date:

Acct:

Provider Name:

Record of Operation

•

Diagnosis and Procedure:

Pre-operative Diagnosis:

Postoperative Diagnosis:

Anesthesia {Anesthesia:46342}

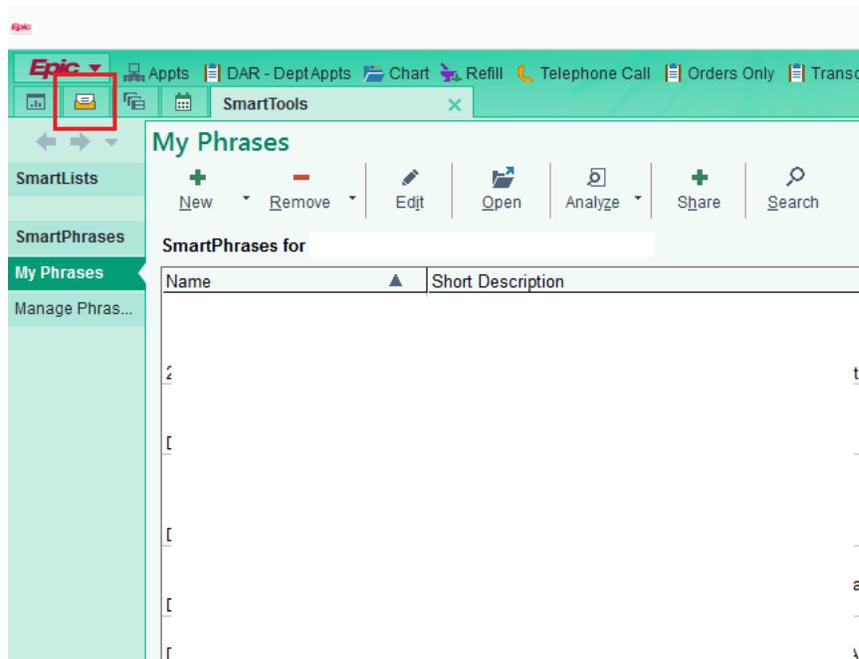
6. You should now see that the [Bracketed] text was replaced with the corresponding coding in your SmartPhrase (as seen above). Don't worry how this simple code looks, it will transform into a list of selectable options when your SmartPhrase is used in a real OP Note! (We will test all of your phrases in [Step 7](#)).
7. Repeat this process for all [Bracketed] text options in the SmartPhrase; be careful not to miss any! You will use the "Yes/No" SmartList in multiple locations, that is okay!
8. Once you have inserted all SmartLists, save your SmartPhrase and click Accept using the buttons in the bottom right corner of the SmartPhrase editor. It is now time to test the functionality.

Step 8: Testing your Smartphrase

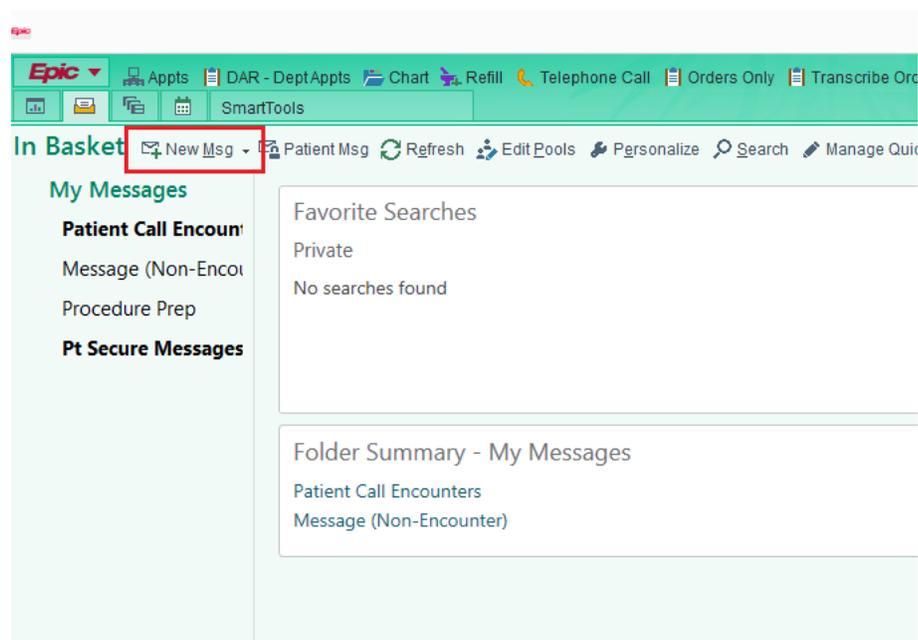
1. Navigate to your In Basket by clicking the mail icon in the top left of your screen or by pressing Ctrl+Alt+2 on your keyboard.

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2. In the In Basket page, click “New Msg.” By default, this should open “Message (Non-Encounter)”

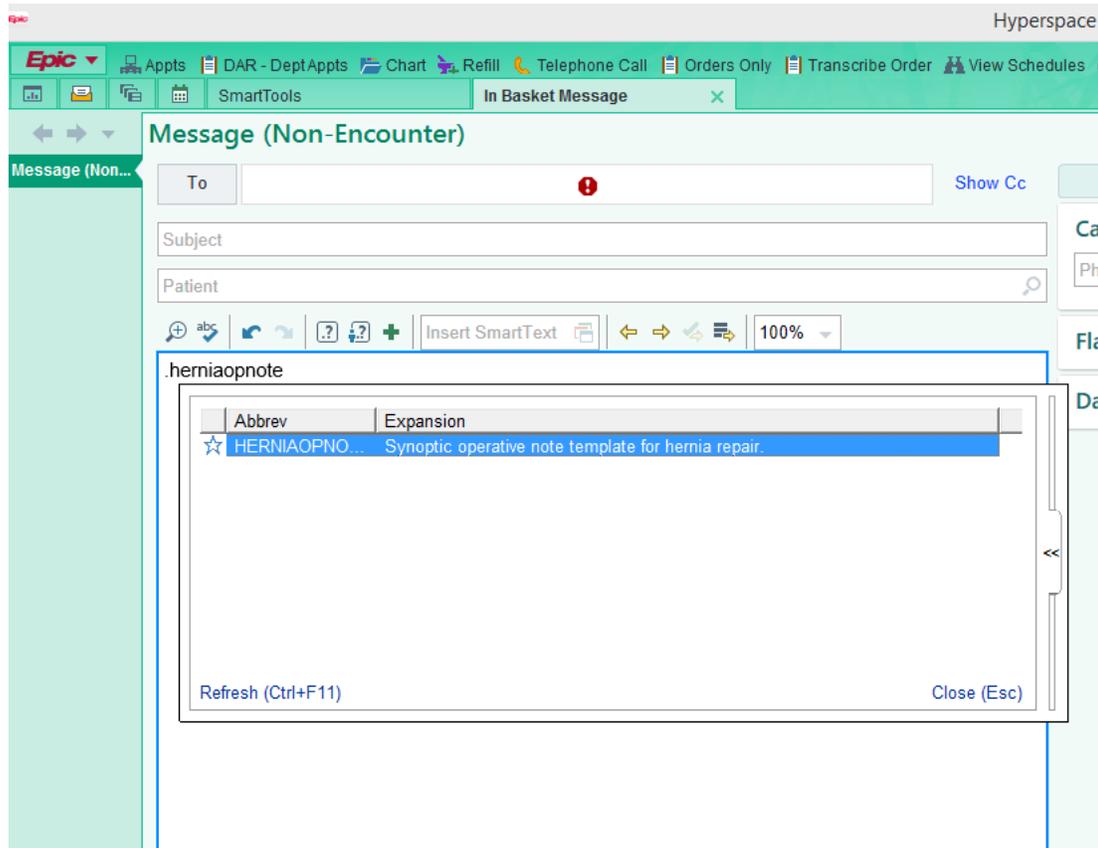


3. You should now see a blank message. Do not address the message, and leave the subject and patient fields empty. Go straight to the blank message field and type a period “.” followed by the name of your Hernia Op Note SmartPhrase. In our example, the Smartphrase is named HERNIAOPNOTE, so we type .herniaopnote. As you begin typing, you will notice a prompt

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appears that will allow you to select the desired phrase, even before you finish typing. Double click the correct phrase (in this case there is only one option) and your note template will appear. Note: because In Basket Messages do not support Rich Text, the body-reference images from the Smartphrase will not appear. Instead they will appear as “??.” This only happens in notes that restrict the use of Rich Text, so don't worry!



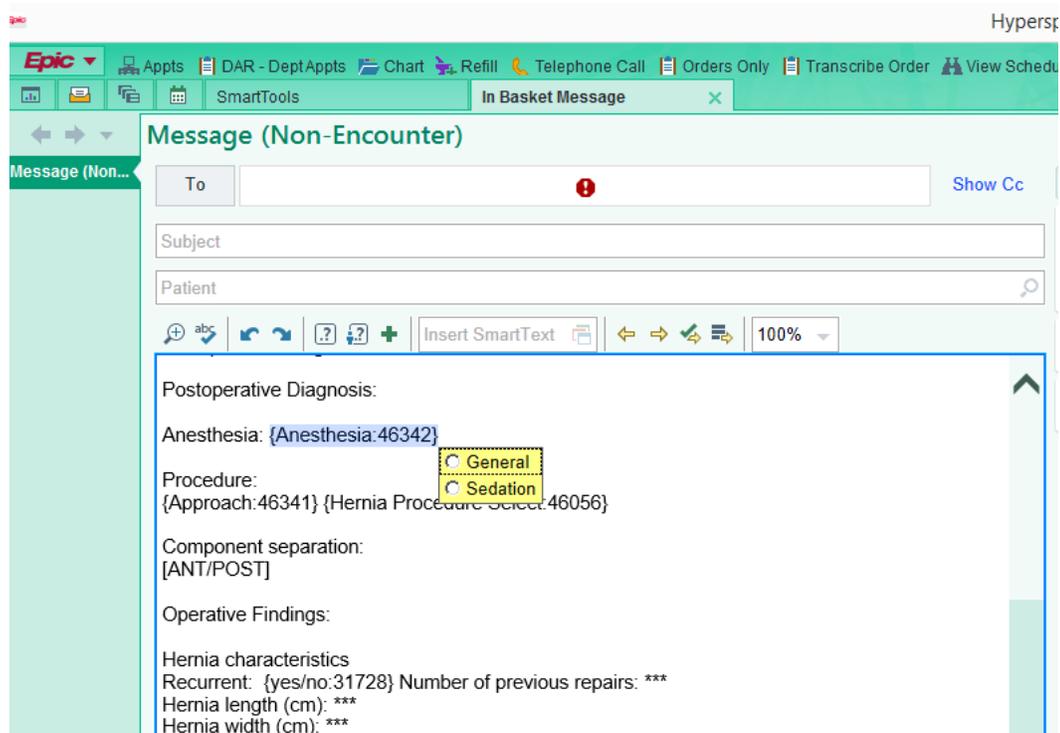
4. Scroll to the top of the note, make sure your cursor is flashing in the text (i.e. click the text as if you are going to type something) and press F2 on your keyboard.

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5. When you press F2, your cursor should snap to the first line of SmartList code, presenting you with the SmartLists' corresponding Choices. In this example, we will select "General" for the Anesthesia SmartList.



6. Double click one of the choices, and your choice text should replace that SmartLists' code in the note, while your cursor snaps to the next available SmartList. In this example, we selected "General" for the Anesthesia SmartList.

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The screenshot shows the Epic Hyperspace interface for creating a message. The message title is "Message (Non-Encounter)". The "Anesthesia" section is highlighted with a red box, and the "General" radio button is highlighted with a yellow box. The text in the message editor includes:

Anesthesia: **General**

Procedure:
{Approach:46341} {Hernia Procedure Select:46056}

Component separ [ANT/POST]
 Open
 Laparoscopic
 Robotic

Operative Findings:

Hernia characteristics
Recurrent: {yes/no:31728} Number of previous repairs: ***
Hernia length (cm): ***
Hernia width (cm): ***
Location:
??

Procedure Details:

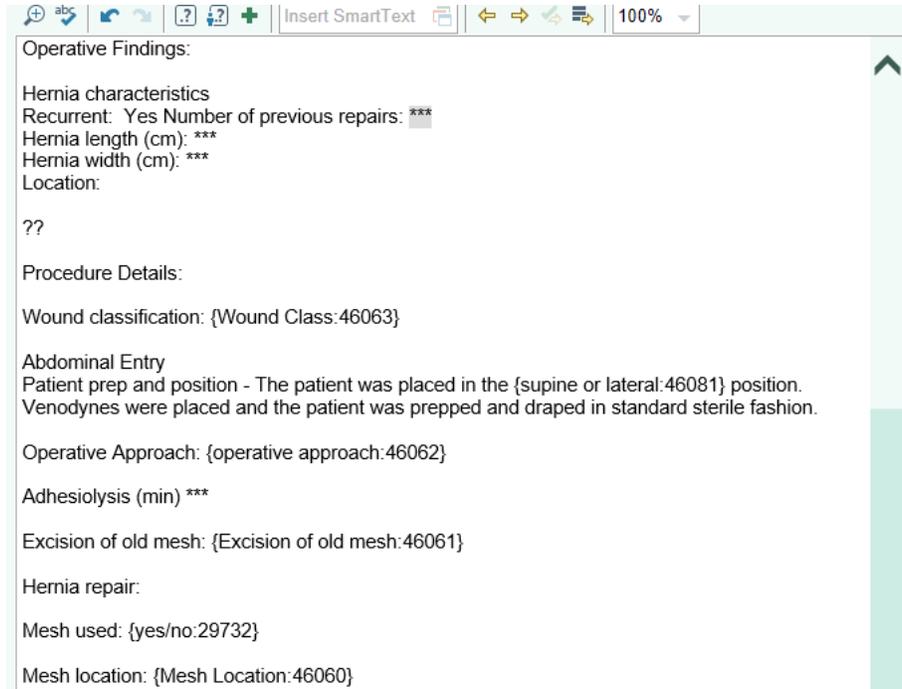
Wound classification: {Wound Class:46063}

Abdominal Entry
Patient prep and position - The patient was placed in the {supine or lateral:46081} position.
Wound dressings were placed and the patient was prepped and draped in standard sterile fashion

7. As you click through the SmartLists, you will notice your cursor will stop on the triple asterisks "***". These are stopping points where Users will manually type data. Type in some test text, and then press F2 to advance to the next triple asterisk or SmartList in your note.

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8. Scan through the note, making sure all SmartLists are functional. Make note of any necessary edits and adjustments and return to your SmartPhrase editor to apply those edits. Note: if you make an edit to the SmartPhrase or Lists, you will have to completely delete all of your In Basket test note and [reenter your SmartPhrase](#) for the edits to take effect.
9. When you are satisfied with your SmartPhrase's formatting and functionality, your phrase is complete and it is now safe to share the Phrase with the intended Users.

Step 9: Sharing your Smartphrase

1. [Navigate to "My SmartPhrases"](#) and select your Hernia Op note. In the Sharing Pane on the right of the screen, type the names of each user whom you would like to be able to use the SmartPhrase.



2. When all of the names have been entered, Press Save and Accept in the bottom right corner of the SmartPhrase editor. Congratulations! You are all done! Be sure to collect feedback from your users and modify the SmartPhrase/Lists according to their needs!