

# Agenda AMBNUR206: Outpatient Nursing Quick Wins: Personalization

**Date:** 5/20/2026 at 8:00:00 AM America/Chicago

**Trainer(s):** Cassi Craig

## Course Learning Objectives

Following this training, participants will be able to:

- Customize Epic personalization settings (tasks, reports, activities, patient lists, and toolbars) to support efficient shift planning and patient review.
- Apply personalization tools within the Brain, chart, and Patient Lists to organize work, reduce cognitive load, and improve task management.
- Evaluate personalization choices to determine which configurations best support individual workflows while maintaining team visibility and consistency.

## Agenda

Time	Topics
5 minutes	<b>Welcome and Introduction to Class Format and Agenda</b> - No credit is provided for this section
15 minutes	<b>Manage Tasks in the Brain</b> Personalize the Brain tool by adding in personal tasks, setting documentation reminders and using other filtering and sorting options.
10 minutes	<b>Efficiently review information in the chart</b> Learn to customize information in the chart for easier reviewing and key search phrases to save time.
15 minutes	<b>Organize documentation tools</b> Customize your set up within a patient's chart by reorganizing activities, updating your main toolbar, editing secure chat settings and personalizing navigators.
15 minutes	<b>Customize Patient Lists</b> Learn to add system lists to favorites, how to edit and filter lists, and how to create a list from scratch.

All training sessions use a current release of the application. If your organization is using an older version of the software, you will likely encounter some discrepancies between the features and functionality you learn and what is available in your system.