# Physician Build – Basic

CLN150

##### Training Room: TBD (see Welcome Board upon arrival for your room assignment)

##### Dates: March 2-4

##### Trainers: Sara Stevenson, John Nelson, Mark Henkelmann, Mark Phelan, & Andy Stoffels

### Prerequisites

Live use of EpicCare or a clinical Fundamentals course (for example, AMB100 or CLN101).

### Purpose of Training:

As a result of this training, Physician Builders will be able to:

* Describe the tools Epic offers for documentation and ordering, including the advantages of each
* Explain how to create SmartTexts, SmartPhrases, SmartLists, and SmartLinks; how to apply rules that determine the most appropriate documentation to present to a user
* Identify how to create SmartForms for NoteWriter
* Discuss how to create SmartSets, Order Sets, and Order Panels
* Describe how to use and create BestPractice Advisories

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| **Study Hall:** An optional half-day Study Hall is offered the afternoon after Physician Build – Advanced class (CLN160). During Study Hall, a Trainer is present to assist you with questions, and you can practice in our classroom training environment and/or work on your Physician Builder projects in the Certification Environments. There is no charge to attend Study Hall. Contact your registrar to sign up if you’re interested! |

**Notes:**

* All Epic 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 at Epic and what is actually available in your system.
* The following agenda will incorporate two 15-minute breaks each day in addition to the scheduled lunch hour.

## Day 1

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| 8:30 | **Welcome and Introduction** |
| 8:45 | **Epic Data Structures**   * Static Data * Dynamic Data * Record Viewer |
| 10:00 | **SmartPhrases and SmartLinks**   * User and System Phrases * User and System SmartLink Parameters |
| 12:00 | **Lunch** |
| 1:00 | **SmartLists**   * Single/Multiple * Lists of Lists * Mutual Exclusivity |
| 3:00 | **Creating SmartTexts and SmartLists**   * SmartText Note Templates * Advanced SmartLists |
| 4:30 | **Introduction to Certification Environments** |
| 5:00 | Hotel shuttles depart Epic |

## Day 2

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| 8:30 | Welcome and questions from the previous day |
| 8:45 | **Overview of Data Migration** |
| 9:00 | **Dynamic Documentation**   * Rule Records (CER) * CERMSG SmartLinks * Groupers |
| 11:00 | **SmartBlock SmartForms**   * SmartData Structure * SmartData Elements |
| 12:00 | **Lunch** |
| 1:00 | **SmartBlock SmartForms, continued**   * SmartForm Designer * Creating SmartBlock SmartLinks * Text Generation |
| 3:00 | **BestPractice Advisories**   * Criteria Records * Base Records |
| 4:00 | Meet one-on-one with your Epic counterparts  Optional: Quiet hands-on and opportunity for questions |
| 5:00 | Hotel shuttles depart Epic |

## Day 3

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| 8:30 | Welcome and questions from the previous day |
| 8:45 | **BestPractice Advisories, continued**   * Logic Considerations * Using CER Rules |
| 9:30 | **SmartSets**   * SmartGroups * SmartSets * Express Lanes |
| 12:00 | **Lunch** |
| 1:00 | **Order Set Build**   * SmartGroups * Order Sets * Merge Templates |
| 2:00 | **Dynamic SmartSets**   * Criteria * SmartSet Base |
| 3:00 | **Order Panels** |
| 3:30 | **Evaluations\* and Adjourn**  \*Available for up to two weeks after class at: <https://training.epic.com/Evaluations> |