This tip sheet provides step by step instructions on how to (1) open and document UHealth Wellness and Fitness visits, (2) create an addendum to a closed encounter, (3) create a telephone encounter, (4) review a patient’s chart, (5) Check In Basket for referrals and (6) create a smartphrase.

Opening a new Wellness encounter

1. On the main toolbar, click the Encounter button and look up your patient.

2. Click the New button to create a new encounter for your patient.
In the new encounter window, select **Wellness** as the Type of encounter and click **Accept** to continue.

New encounter opens to the **Visit Navigator**

Most of the sections in this navigator are for review purposes. The only sections you will be required to document are the **Visit Info** (reason for visit) and **Progress Note** to be able to close this type of encounters. **All encounters must be closed!**
Visit Info

Note: If unable to find the reason for visit, select ‘Other’ and free text in Comment field.

Progress Note

Once you complete this encounter, Close Encounter.

If you try to close an encounter without a progress note, the following required item will display:

Creating an Addendum to a closed encounter (Epic>Patient Care>Addendum)

1. Look up your patient.
2. Select the encounter you wish to addend and Accept.
3. Once updates have been made, click Sign/Route Addendum.
Documenting a patient telephone call

1. Click **Telephone Call** on the main toolbar and look up the patient.

Check the **Provider** and **Department** information are correct and click **Accept** to open the telephone encounter.
Telephone encounter opens to the visit navigator:

Document the following sections:

Contacts

Reason for Call
Once you have completed the sections mentioned above, click **Close Encounter**.

**Viewing a patient’s chart (Chart Review)**

To view information about past visits, progress notes, imaging, letters, and more, open the **Chart Review** activity.

1. Click **Chart**. The Chart Review activity opens.

2. To view past visits, select the **Encounters** tab. All of the patient’s visits appear in a list.
Creating SmartPhrases

A SmartPhrase is a type of SmartTools use to pull in long words, phrases, or paragraphs into your documentation. You can pull system smartphrases by using a dot (.) or you can create your own. You can use SmartTools in many places throughout UChart, such as notes, patient instructions, and letters. If you see these buttons, the field is SmartTool-enabled:

On the Fly

While writing a note or letter, type the text you want to make into a SmartPhrase.

1. Click and highlight to select the text.
2. Click to open the SmartPhrase Editor window.

3. In the Name field, enter a name for your SmartPhrase. This name should be easy to remember and as short as possible.
4. Click Accept to save your SmartPhrase.
5. To use your SmartPhrase, type a period followed by its name. In the example pictured below, you would enter ‘ointment’ to use the SmartPhrase.

Not On the Fly

Epic button > Tools > My SmartPhrases. The SmartPhrase Editor does not open when you follow this path. Instead, the SmartPhrase List activity opens in a Workbench workspace. To create a new SmartPhrase, click the New button on the SmartPhrase List toolbar.