

Creating SmartSets to include patient education in Epic EHR



SmartSets including patient education

Order Sets, called **SmartSets** in Epic EHR, provide simultaneous ordering of all necessary components associated with effective clinical care such as lab tests, x-rays, and medications. **SmartSets** are efficient for the provider and can lead to better care.

SmartSets can be used for immunizations to help ensure patients receive all the appropriate recommended immunizations, complete the series for multi-dose immunizations, and receive appropriate patient education information such as the Vaccine Information Statement (VIS) and information on why series completion is important.

Benefits of patient education as a SmartSets component

SmartSets can help providers to remember to order all the necessary components of an immunization, including related patient education.

Consideration:

User privileges to create **SmartSets** may be limited to select users with specific security privileges or subject to practice business policies.

If you have further technical questions, consult your internal or external Electronic Health Record (EHR) support resources.

This guide provides a high-level overview of how to create a SmartSet, complete with patient education, within Epic EHR. This overview is designed to provide guidance for you, your practice's EHR champion, or IT staff.

Please note that this guide was created based upon Epic EHR version 2020. Screens and features may change as new software versions are released.

This guide is for informational purposes only and is not intended to replace detailed instructions provided to you by your internal or external EHR support resources. The information in this guide is subject to change without notice. GSK makes no claims or warranties about the applicability or appropriateness of this information.

SmartSets for immunizations and patient education

SmartSets can be set up narrowly with single choices for specific diagnoses or conditions, or very broadly with multiple choices. **SmartSets** may be similar; for example, an **Adult Wellness Visit SmartSet** could be similar to an **Adult Female Preventive Interventions SmartSet**.

To add a immunization to a SmartSet

Creation of a new **SmartSet** or updating an existing one is typically managed by the health system IT support team with an established process for requesting, approving, and implementing an update. When making an IT request to set up or modify a **SmartSet**, consider including the following information to ensure it is appropriately configured:

- The **SmartSet** being modified; for example, **Adult Female Preventive Interventions SmartSet**
- Select the **Smart Group** where the modifications will occur; for example, **Immunizations** is a **Smart Group** within the **SmartSet** and used for immunizations to be administered in the practice. **Medications** is also a **Smart Group** within a **SmartSet** and used for immunizations to be administered at the pharmacy
- The name of the new immunization to be added to the **Smart Group**: for example, **Product X Vaccine**
- Whether the immunization is to be added is an ambulatory order and if it will be considered routine, and whether the administration will be performed in the clinic
- Parameters such as age can be also included

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To add patient education

In addition to adding an immunization to a **SmartSet**, patient education material can also be added. The IT request to add patient education should include:

- The **SmartSet** being modified
- **Smart Group** where the modifications will occur; for example, patient education
- The name of the patient education material to be added

SmartSet configuration for **Adult Female Preventive Interventions**. The configuration includes several sections, each with a 'Close' button:

- Diagnoses**: Preventive Codes
- Labs**: Hepatitis C screening, HIV screening, Lipid / metabolic screening, Pap smear
- Imaging**: DEXA
- Procedures and Other Orders**: Colon cancer screening
- Medications**: Hepatitis B Vaccine
- Immunizations** (expanded):
 - Immunizations (expanded):
 - Flu vaccine, adult, preservative-free IM
 - Pneumococcal polysaccharide vaccine 23-valent, adult, subcutaneous/IM
 - Td vaccine, adult, preservative-free IM
 - Product X Vaccine
- Level of Service**: Preventive Service - New Patient, Preventive Service - Established Patient
- Patient Education**:
 - The Influenza vaccine - What you need to know
 - The Pneumococcal vaccine - What you need to know
 - Hepatitis B Vaccine - What you need to know
 - Product X - What you need to know

*An example of how the immunizations might appear in a **SmartSet** for Adult Female Preventive Interventions.*

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