How to Create a Note Template in Epic Using SmartPhrases and SmartLists

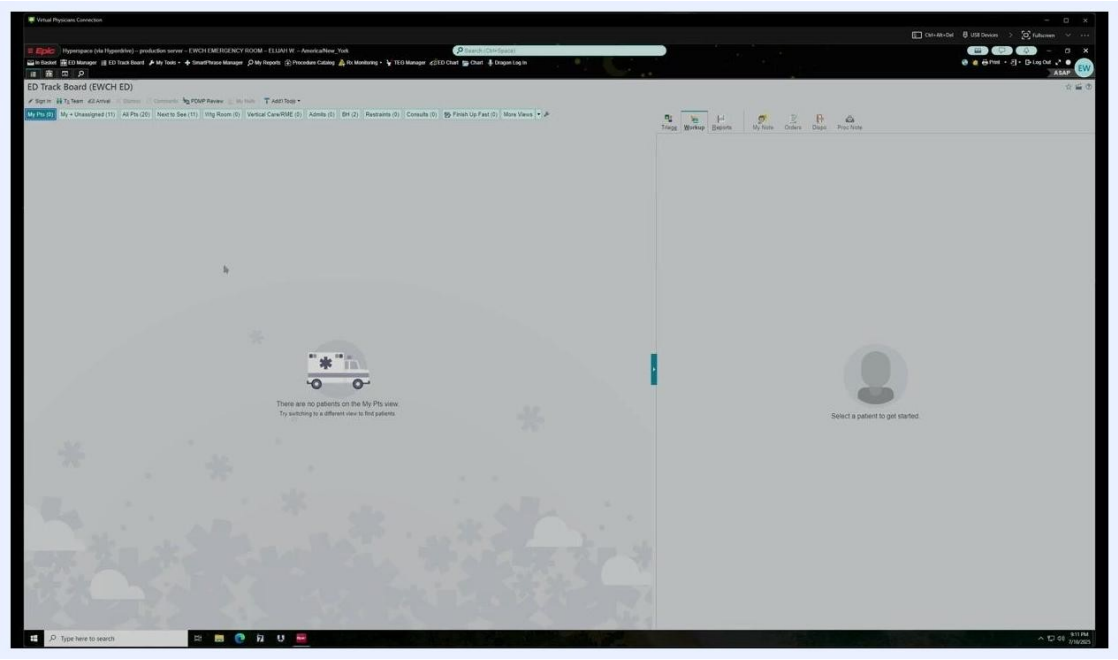
Epic's SmartPhrase and SmartList tools let you build reusable note templates that automatically pull patient-specific data into your documentation. This guide walks you through how to create a note template in Epic, customize it with SmartLinks and SmartLists, and share it with your team to streamline clinical documentation and discharge instructions.

Prerequisites

- Access to the Epic main interface with permissions to open SmartPhrase Manager.
- Familiarity with your facility's existing SmartPhrases, if any have already been shared with you.

Step 1: Open the Epic main interface

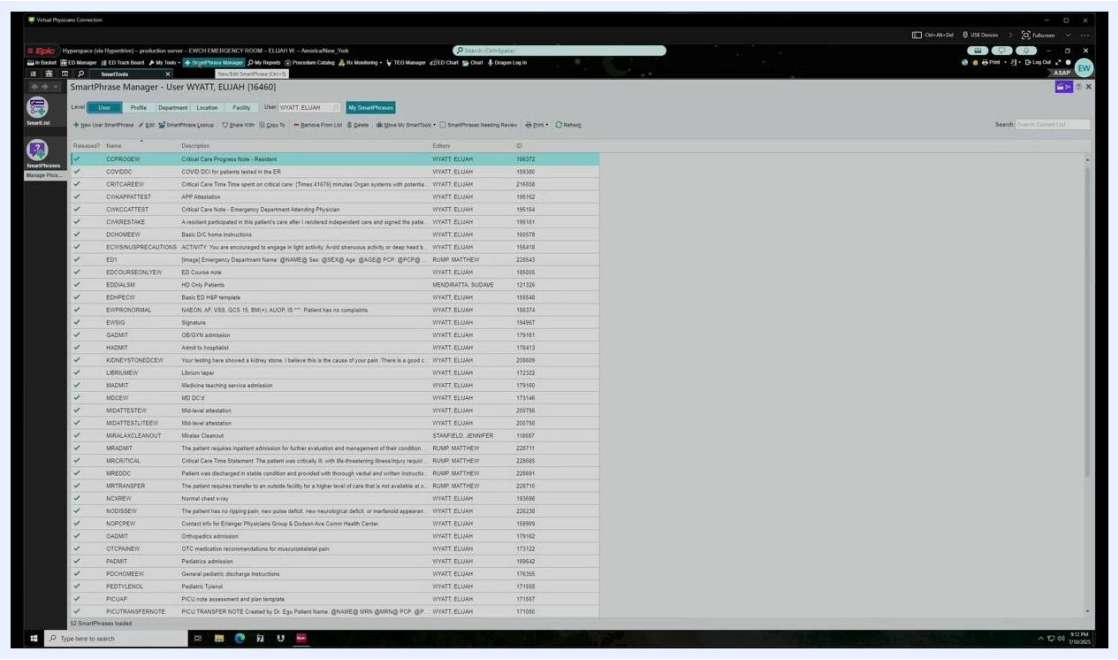
The main screen displays the ED Track Board. The top menu bar includes options such as Epic, ED Manager, ED Track Board, My Tools, and SmartPhrase Manager. The patient list area may be empty if no patients are assigned, and the right panel includes tabs for Triage, Workup, Reports, My Note, Orders, Dispo, and Proc Note.



Epic ED Track Board main screen with an empty patient list and visible navigation tabs

Step 2: Navigate to SmartPhrase Manager

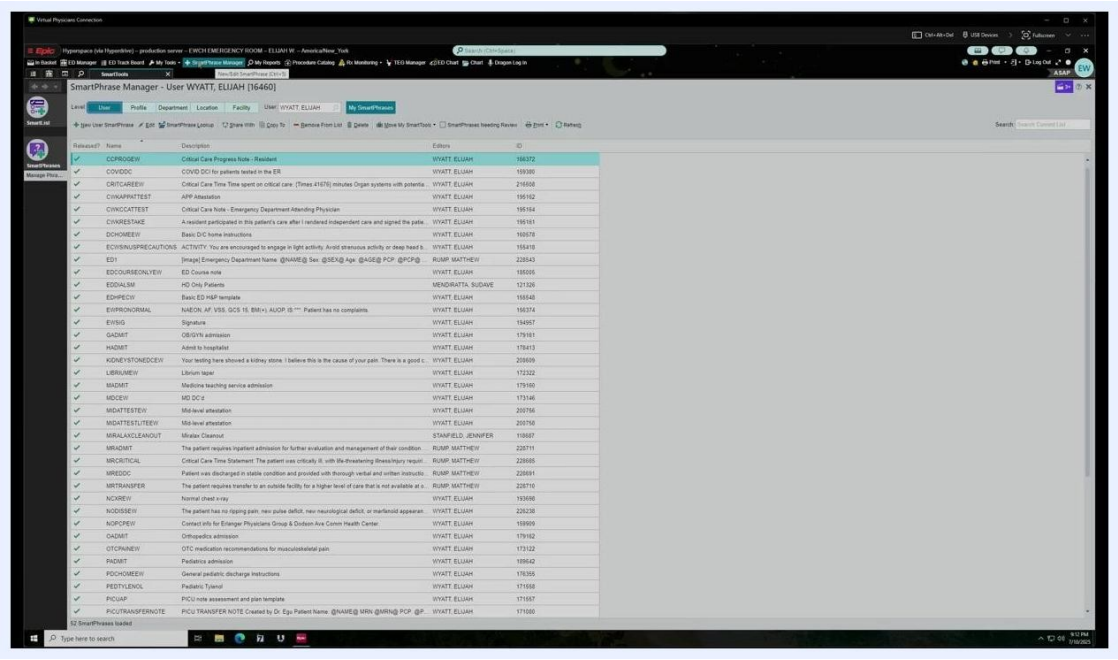
Click the Epic button in the upper left corner, then go to Tools and select SmartPhrase Manager from the dropdown menu. You can right-click SmartPhrase Manager to pin it to your toolbar for quicker access in the future. If it is already pinned, open it directly from the toolbar.



Epic interface showing the path to SmartPhrase Manager through the toolbar

Step 3: Review your SmartPhrase list

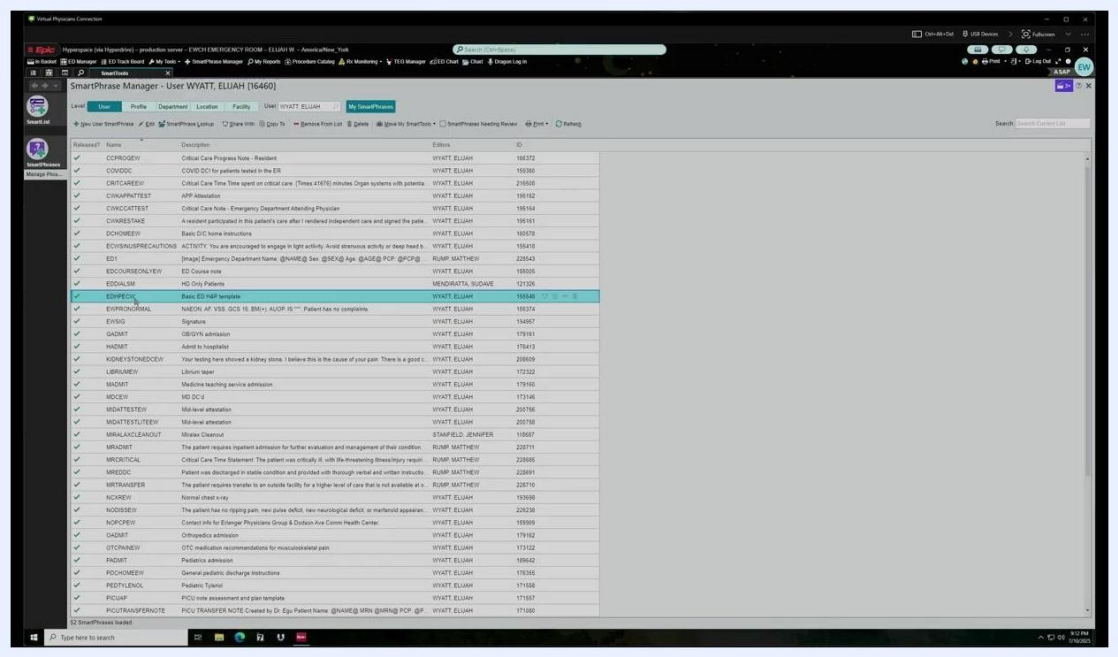
The SmartPhrase Manager window displays a list of available SmartPhrases. Your list may be empty if you have not created or received any, or it may already contain templates shared by colleagues. The list includes columns for the phrase name, description, and editor.



SmartPhrase Manager window listing SmartPhrases with name, description, and editor columns

Step 4: Select a template to view or edit

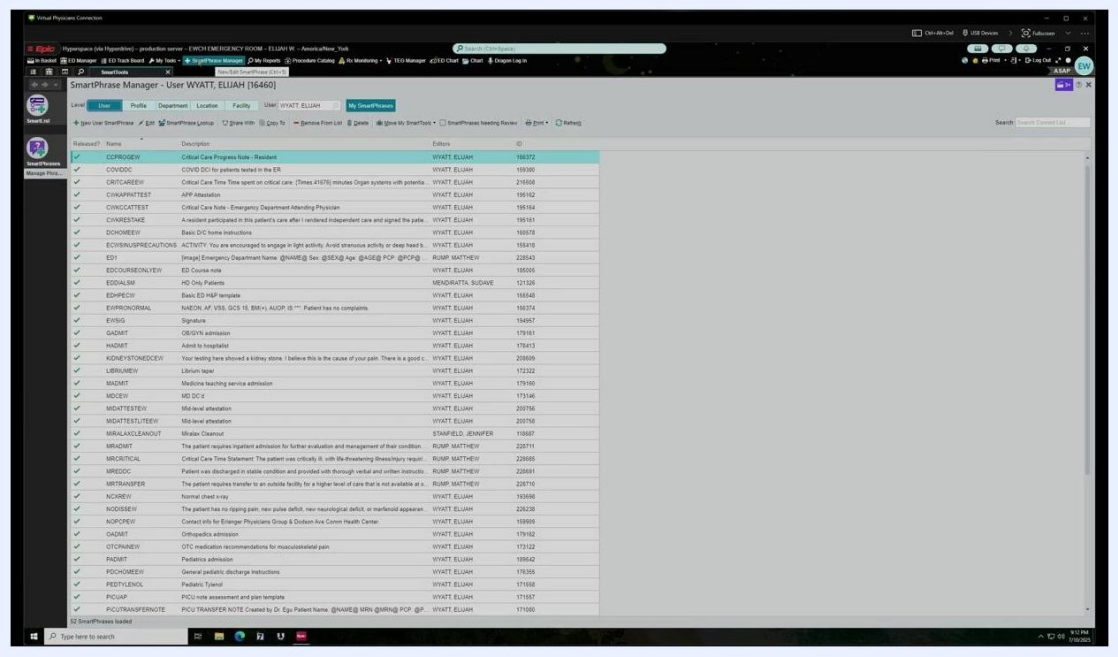
Click on a SmartPhrase from the list, such as EDHPECW for a basic ED H&P template. The selected template opens in an editor that resembles a word processor and supports rich text formatting so you can modify it as needed.



SmartPhrase Manager with a template selected and ready to open

Step 5: Edit the template content and settings

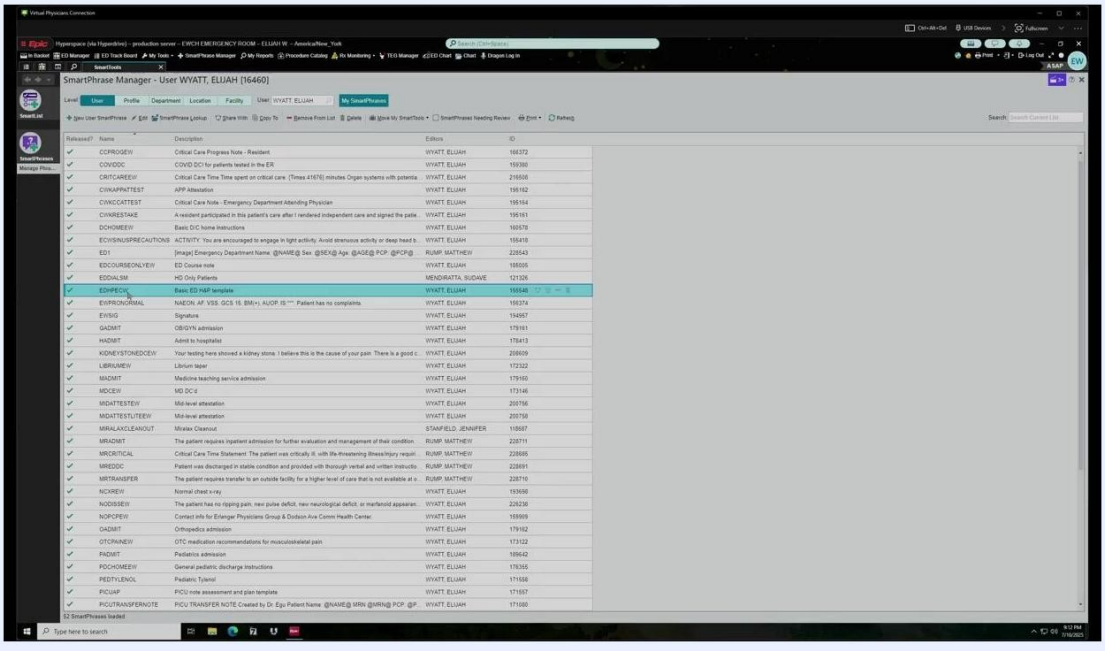
The template editor displays the content of the SmartPhrase, which you can freely edit, format, and add to or remove from. The right panel includes settings for the template name, description, text format (Rich Text or Plain Text), and sharing options, where you can specify which users can view or edit the template.



SmartPhrase template editor showing editable fields, formatting options, and sharing settings

Step 6: Use variables and SmartLinks to auto-populate data

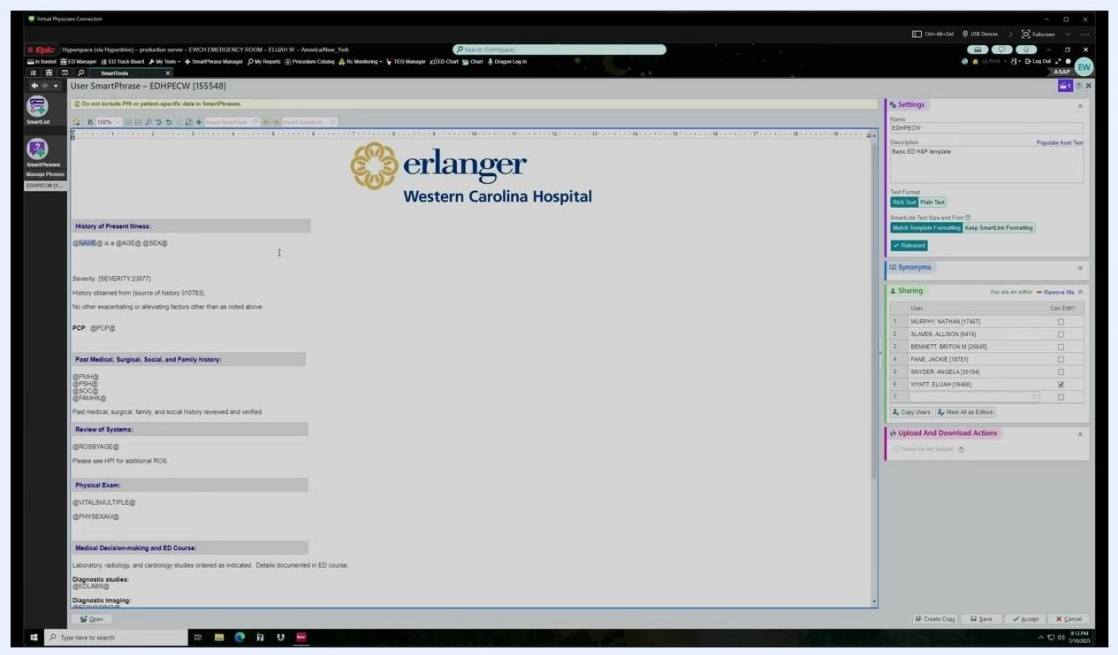
Items surrounded by "@" symbols, such as @NAME@, @AGE@, and @SEX@, are placeholders that automatically pull patient-specific data from the chart. Additional SmartLinks are available for fields like first name and last name, and a database of available SmartLinks can be found online for further customization.



SmartPhrase template editor showing SmartLinks in use alongside hospital branding

Step 7: Explore and customize further

Browse the available SmartLinks and templates to enhance your documentation workflow. Modify existing templates or create new ones to suit your needs, then save your changes and share templates with colleagues as appropriate.



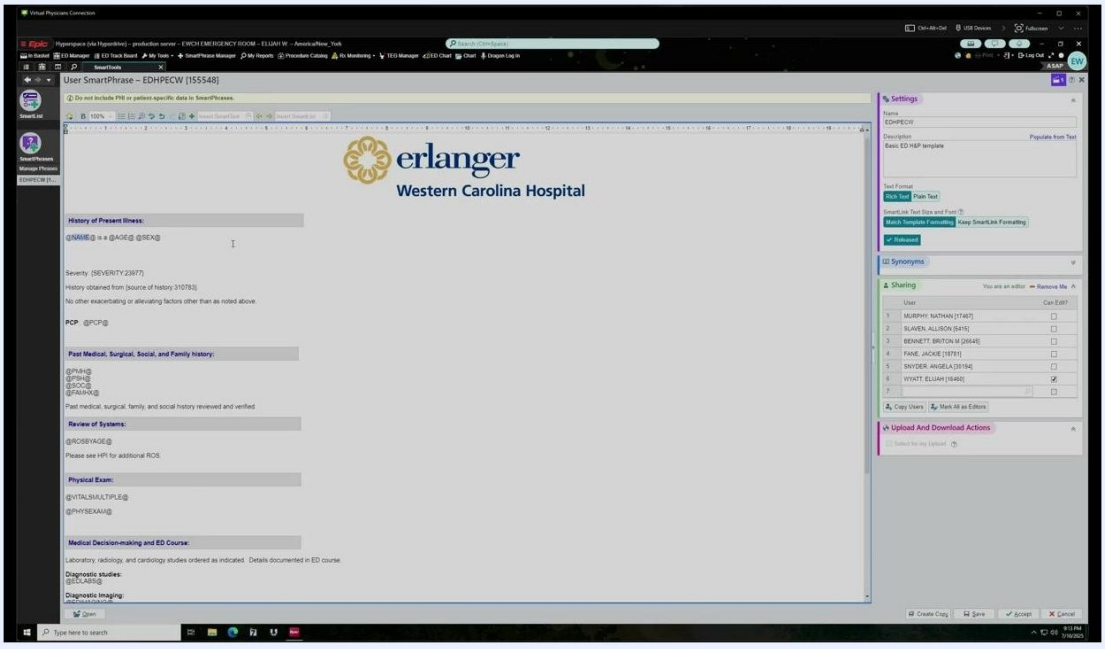
SmartPhrase template editor displaying the hospital logo, SmartLinks, and sharing options

Step 8: Review a full template structure

A comprehensive note template typically includes these sections:

- History of Present Illness — uses SmartLinks such as @NAME@, @AGE@, @SEX@ to auto-populate patient data
- Past Medical, Surgical, Social, and Family History — uses SmartLinks like @PMH@, @PSH@, @SOC@, @FAMHX@
- Review of Systems — uses @ROSBYAGE@ and prompts for additional review of systems
- Physical Exam — uses @VITALSMULTIPLE@ and @PHYSEXAM@
- Medical Decision-making and ED Course — includes SmartLinks for labs, imaging, therapies, procedures, and clinical course
- Final Impression — uses @DIAG@ to pull in the diagnosis
- Signature — optionally includes a custom signature SmartPhrase such as @ME@

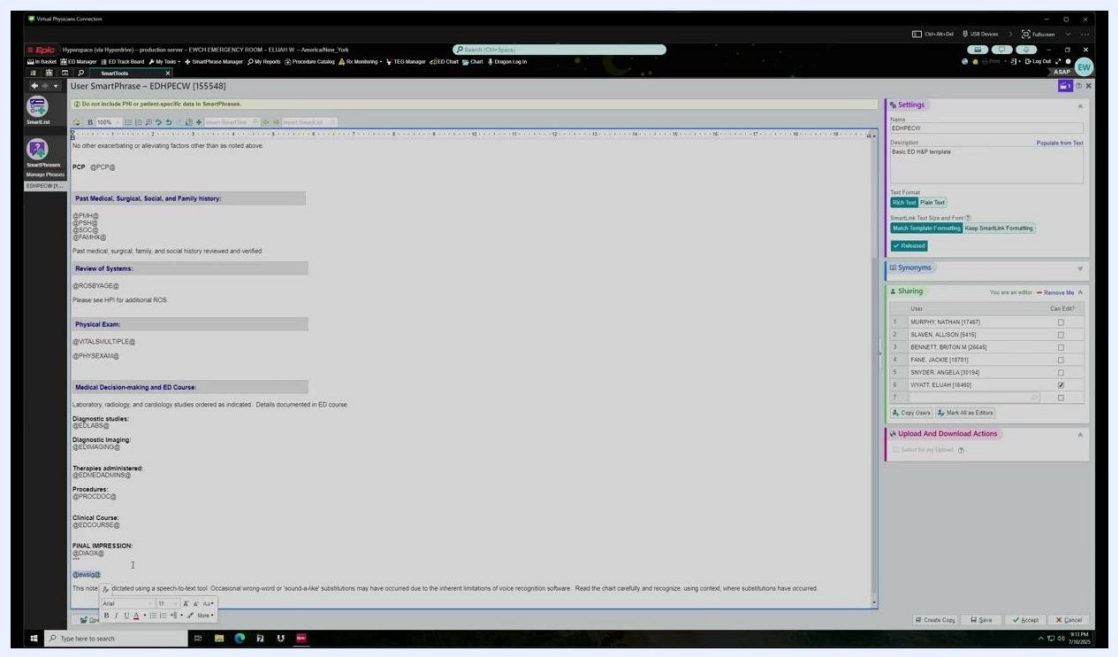
The right panel displays template settings, sharing options, and synonym management.



SmartPhrase template editor showing all major sections, SmartLinks, and sharing settings

Step 9: Understand how clinical data is pulled in

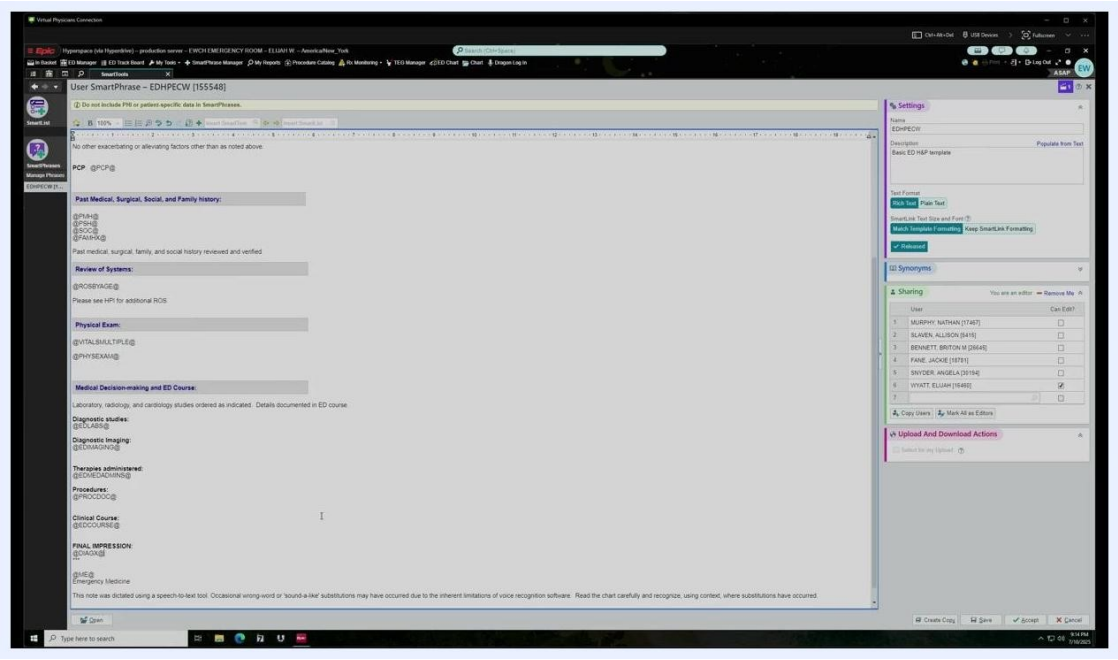
SmartLinks such as @EDLABS@, @EDIMAGING@, @EDMEDADMINS@, and @PROCDOC@ automatically insert relevant labs, imaging studies, administered therapies, and procedure notes performed in the ED. Document your Medical Decision Making in the "ED Course" section, and the "Final Impression" section pulls in the diagnosis using @DIAG@. The signature section can use a custom SmartPhrase like @ME@ to insert your name and credentials automatically.



SmartPhrase template with populated SmartLinks for labs, imaging, therapies, procedures, and signature

Step 10: Create a reusable signature SmartPhrase

Develop a separate template for your signature, for example containing your name and "Emergency Medicine." Insert the signature SmartPhrase, such as @ME@, at the end of your main template. This lets you update your signature in one place, and the change will reflect across every template using @ME@.



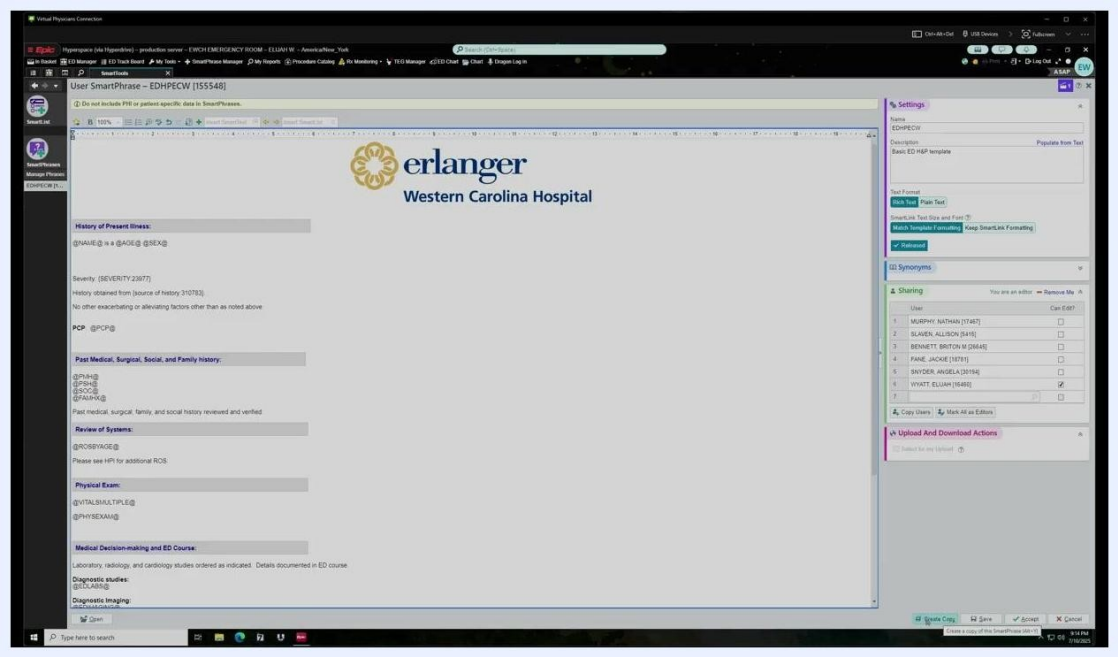
SmartPhrase template editor with a signature SmartPhrase followed by the text "Emergency Medicine"

Step 11: Recognize SmartLists within templates

Items surrounded by brackets with numbers, such as [ ], represent SmartLists. These provide selectable options within your documentation, allowing for quick selection of predefined options and streamlining documentation further.

Step 12: Copy an existing template

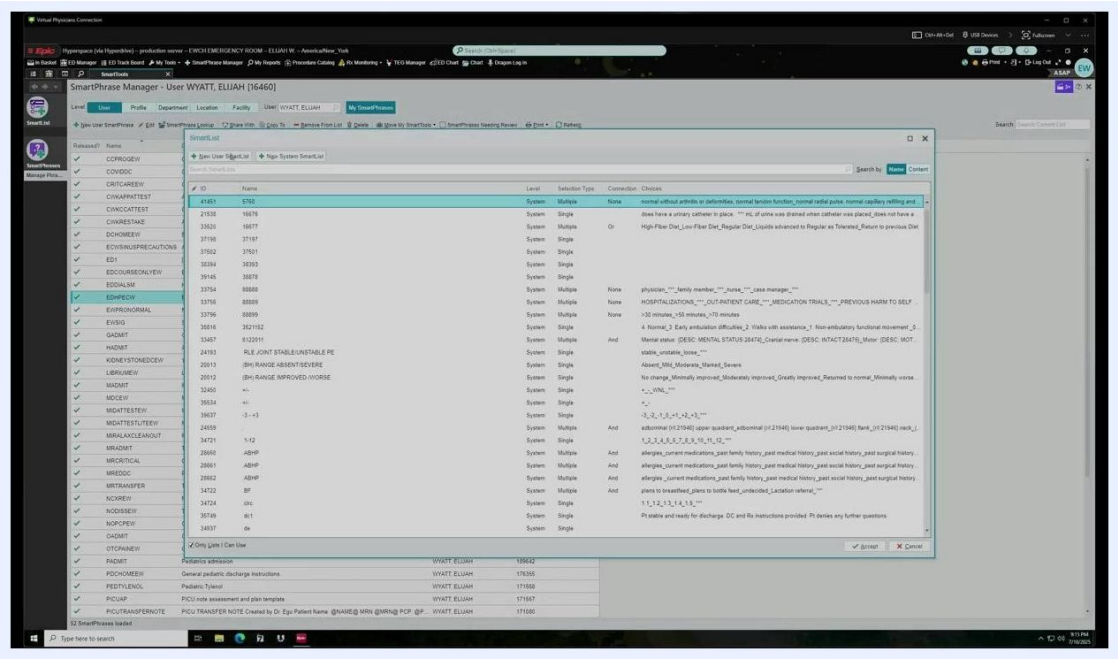
Click Create Copy at the bottom of the SmartPhrase editor window, then enter a new name for the copied template, such as "EWCHP." Save the new template for personal use or for sharing with colleagues.



SmartPhrase editor showing the "Create Copy" button and a field for entering the new template name

Step 13: Browse all available SmartLists

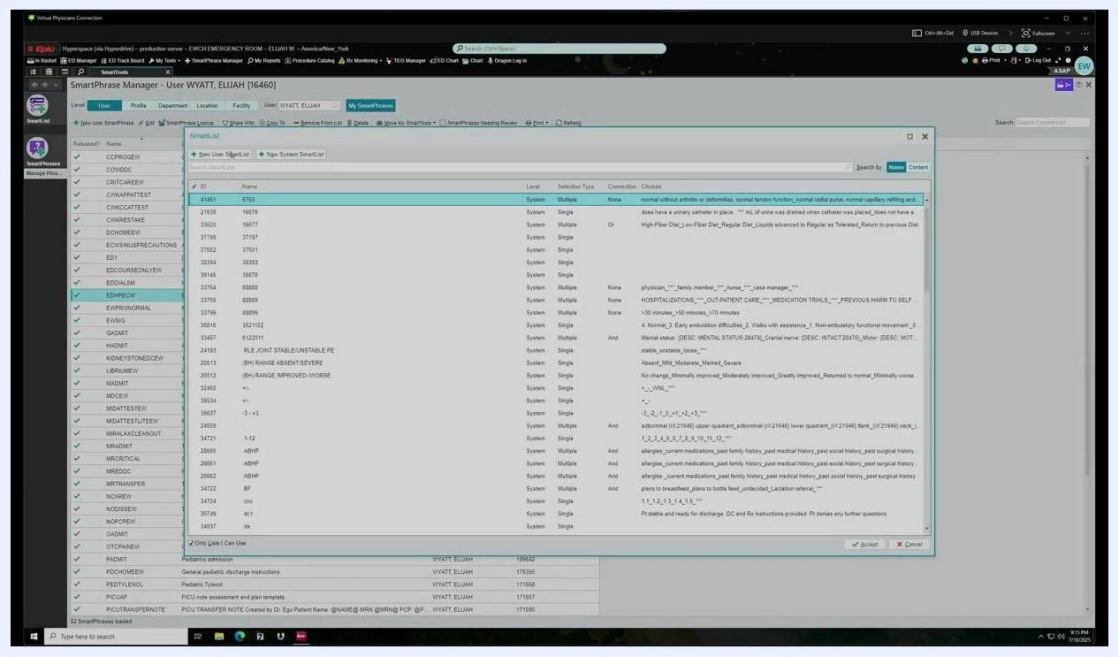
In the SmartPhrase Manager, locate the SmartList tab at the top of the window and click it to display a comprehensive list of all standard SmartLists in the system. There are thousands of SmartLists available, each with a unique ID, name, selection type, and list of choices.



SmartPhrase Manager showing the full list of system SmartLists with ID, Name, Level, Selection Type, and Choices columns

Step 14: Create a new SmartList

Click New User Smart List at the top of the SmartList window to open a new editor. Enter each option on a separate line, pressing Enter after each one. Optionally, check the Default? box next to any option you want selected by default — useful for discharge instructions where you may want to pre-select the most common instruction.



User SmartList editor with multiple options entered and a default option checkbox

Step 15: Configure SmartList settings and save

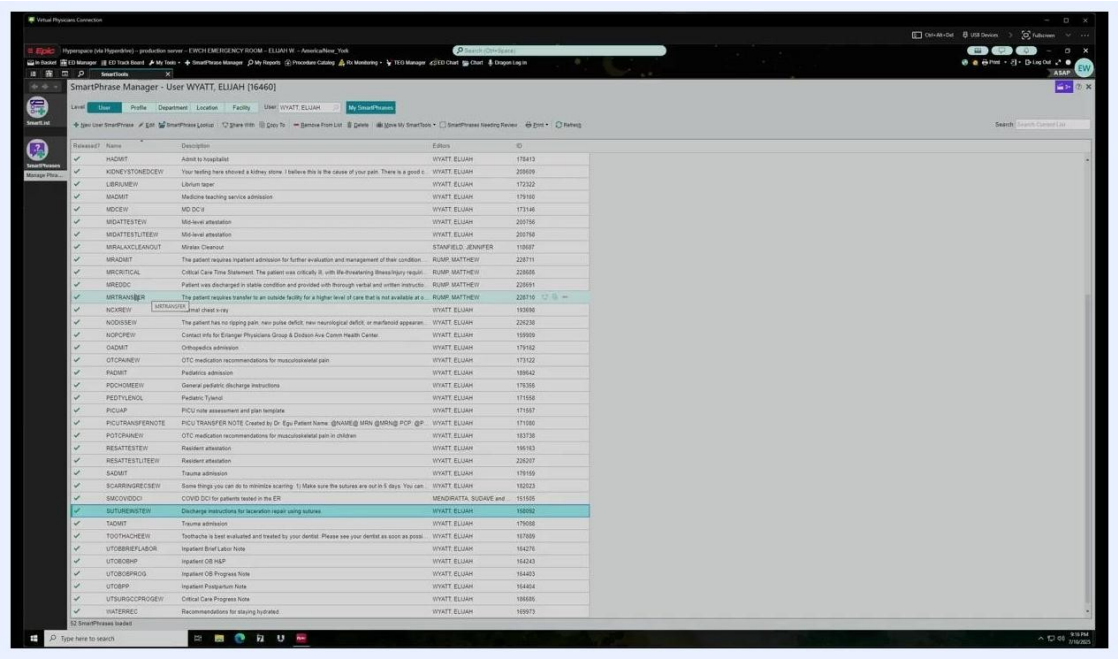
On the right panel, enter a name for your SmartList in the Name field, and optionally provide a display name and choose whether to include it as a label. Set the selection type (Single or Multiple) and connection logic if needed, and manage sharing permissions by adding users and specifying who can edit the SmartList. Click Save at the bottom right to finish.

Step 16: Insert a SmartList into a template

While editing a SmartPhrase, click Insert Smart List at the top of the editor and search for your SmartList by name or content. Double-click the desired SmartList to insert it into your template, where it will appear in the note in a bracketed format.

Step 17: Apply SmartLists to discharge instructions

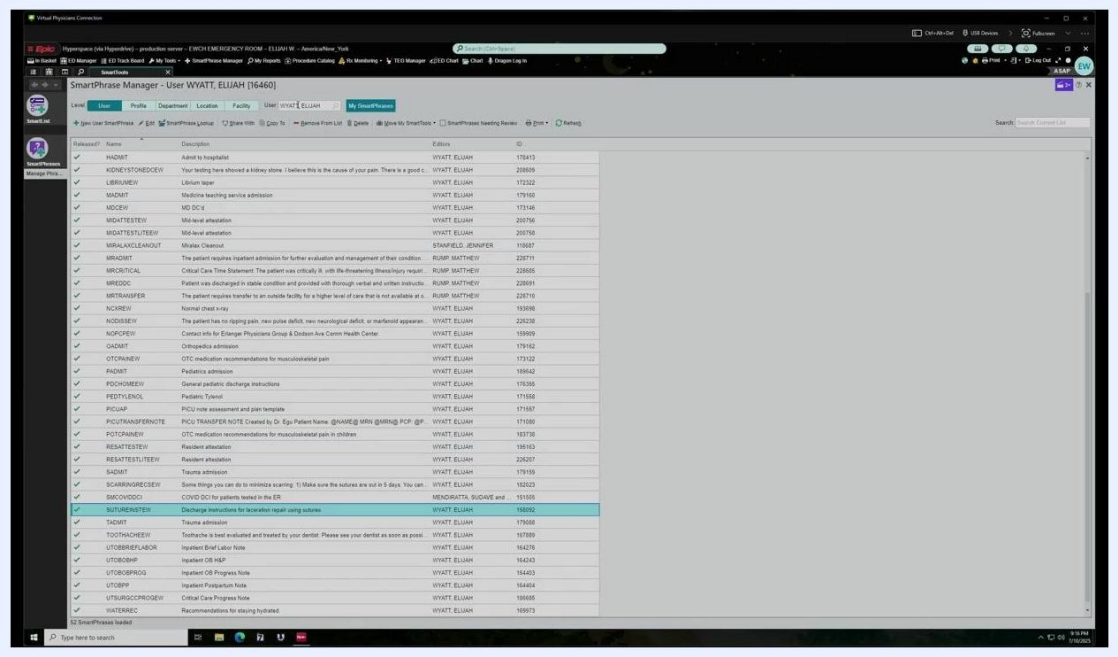
Create SmartLists for variables such as suture type (absorbable or non-absorbable) and suture removal timing, then insert them into your discharge instruction SmartPhrase template. This lets you quickly select the appropriate options for each patient.



SmartPhrase template for suture discharge instructions with embedded SmartLists for suture type and removal timing

Step 18: Share SmartLists and SmartPhrases with other users

In the SmartPhrase Manager, type the name of the user whose templates you wish to view, then select the desired SmartPhrase or SmartList from their list. Use Share to subscribe to their template so you receive updates if they make changes, or use Copy Users or Mark All as Editors to manage permissions efficiently.



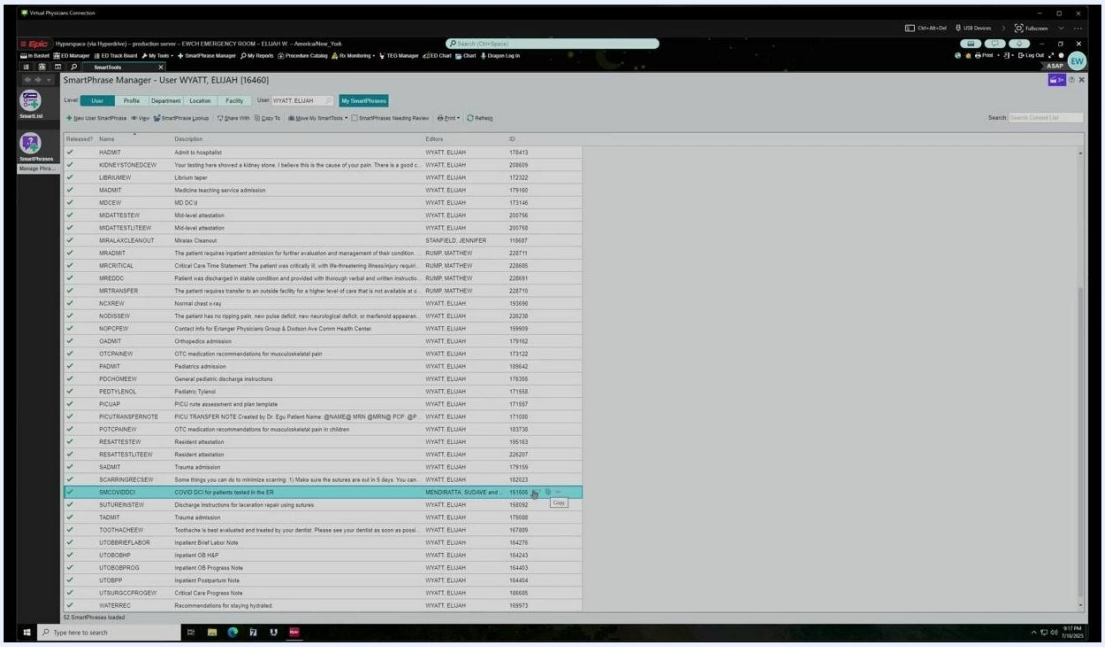
SmartPhrase Manager showing user search, template selection, and sharing options

Step 19: Choose between "Share" and "Copy"

Both options are accessible from the SmartPhrase Manager by selecting a template and clicking either Share or Copy next to the entry. The interface displays available templates with columns for Name, Description, Editors, and ID.

- Use Share to subscribe to the original template; any changes made by the owner will automatically update for you as well.
- Use Copy to create a separate copy in your account; changes made by the original owner will not affect your copy, which is useful for customizing a template without being affected by future updates.

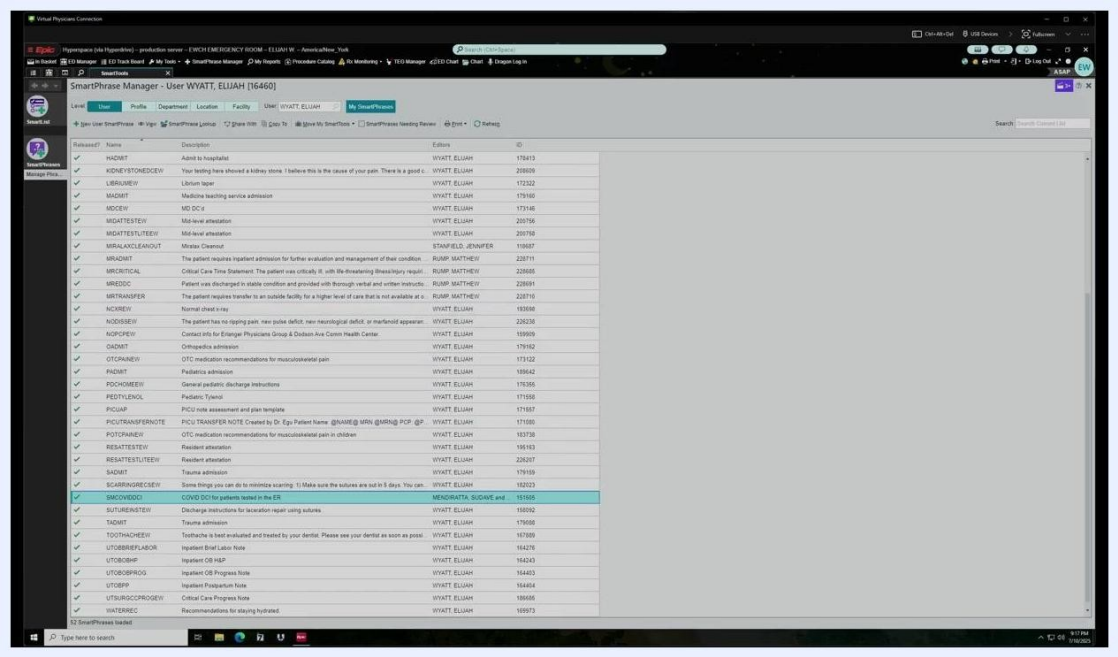
For example, to copy the "COVID D/C for patients tested in the ER" SmartPhrase, click Copy next to it. To subscribe to updates instead, click Share.



SmartPhrase Manager showing the "Share" and "Copy" buttons for a highlighted template

Step 20: Verify your template is available

Check the SmartPhrase Manager under My SmartPhrases to confirm that your selected or newly created SmartPhrase or SmartList appears in your account and is ready for use.



SmartPhrase Manager main screen showing the full list of SmartPhrases and SmartLists with no active selection

Summary

You now know how to create a note template in Epic using SmartPhrases, enrich it with SmartLinks that auto-populate patient data, and add SmartLists for quick, standardized selections such as discharge instructions. You can also copy existing templates for personal customization or share them with colleagues to keep everyone working from the same up-to-date documentation.

What's next

Continue customizing your templates by exploring the full SmartLink database for additional fields, and consider building SmartLists for other repetitive documentation needs across your workflow.