# Smart Tools Naming Convention

## Smart Stuff

As clinicians tap the power of personalization, they build and share preference lists, Smart Phrases, Order Sets and other efficiency boosts. Many 'smart' things (SmartTools, SmartText, SmartPhrases, SmartLists, SmartLinks, SmartSets, SmartForms, etc.), allow personalized variants to be shared with colleagues. The lists of localized content can get long and confusing, with tools that address similar clinical areas separated in different parts of a cluttered list. Attention to even the simplest naming convention makes it easier to find what one seeks.

## Naming Limitations

Some of Epic's savable personalizations have constraints on how they can be named. SmartPhrase names, for example, cannot contain spaces (which would indicate the end of the name). Happily, it is usually possible to save short, informative, labels for shared items.

## Completion Matching

Trying to find a specific tool within a long list of tools is made easier with completion matching. This allows the first few letters to be typed in a search-box, with rapid filtering of the pick-list to items containing those letters. The first letters of any object name are important to efficient completion matching. One does not have to include in a name reflection of things that can be known or filtered outside the object name, such as the author.

## Name Elements

If a preference, Smart object or other personalization is specific to an individual, then the first letters of the item name should be the idividual's initials and the item should not be shared.

Sharing is most likely to occur within specialty groups. Accordingly, the first letters of an object (e.g. SmartPhrase) name should reflect the specialty. If there is strong localization (the tool is only relevant for a zone or facility), then a localization abbreviation can be added at the beginning.

The second most important consideration is the clinical context, as tools that work in Inpatient may not work in Emergency or Outpatient contexts.

The third most important consideration might be the applicable workflow or function, such as History or Medications.

## Naming Convention

These elements can be the basis of a naming convention. The first few letters of a name can represent the clinical area. The next can reflect the context and letters that follow can represent the topic or use.

**XXXYYZZTopic**

- XXX – (Localization+) Clinical Area
- YY – clinical context
- ZZ – workflow, task or function
- Topic – actual clinical purpose or use

## Localization

Abbreviations for locations are common in Connect Care pick-lists and so are easy to emulate. In most cases, however, a Smart Tool does not have to be localized to a zone or a facility, so this can be dropped. Wave 1 localization abbreviations include:

| DEV | Devon | EDM | Edmonton | FTS | Fort Saskatchewan |
|-----|-------|-----|----------|-----|-------------------|

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|---|---|---|---|---|---|
| LED | Leduc | STA | St Albert | STO | Stoney Plain |
| SWP | Strathcona | | | | |

## Clinical Area

Clinical Areas also have common 3-letter short abbreviations. We suggest the following mappings:

| | | | | | |
|---|---|---|---|---|---|
| AN | Anesthesiology | AUD | Audiology | CAR | Cardiology |
| DER | Dermatology | RAD | Diagnostic Imaging | EMD | Emergency |
| END | Endocrinology | FAM | Family Medicine | GAS | Gastroenterology |
| GEN | Genetics | GIM | General Internal Medicine | IDX | Infectious diseases |
| MED | Internal Medicine | | | | |
| ICU | Intensive Care | NEO | Neonatology | NEU | Neurology |
| NUS | Neurosurgery | NUC | Nuclear Medicine | OBG | Obstetrics/Gynecology |
| OCC | Occupational Medicine | ONC | Oncology | OPT | Ophthalmology |
| ORT | Orthopedics | OTO | Otolaryngology | PAT | Pathology |
| PED | Pediatrics | PHA | Pharmacology | PLS | Plastic Surgery |
| PSY | Psychiatry | PUL | Pulmonary Medicine | RDO | Radiation Oncology |
| RHU | Rheumatology | SUR | Surgery | TXP | Transplant |
| TRA | Trauma | URO | Urology | VAS | Vascular |

## Clinical Context

Terms for clinical context may vary by specialty, with the following illustrative only:

| | | | | | |
|---|---|---|---|---|---|
| ER | Emergency | IP | Inpatient | CC | Critical Care |
| OP | Outpatient | CN | Continuing Care | RH | Rehabilitation |
| PR | Procedural | OR | Operating Room | MU | Medical Outpatient Unit |
| HX | History | RS | Review of Systems | HX | History |
| PE | Physical Exam | DX | Diagnosis | RX | Medication |
| TX | Therapy | PX | Procedure | SX | Surgery |
| AD | Admit | DC | | TR | Transfer |

## Examples

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|---|---|
| **.GIMHXDM2** | Smart phrase that brings up a standard block of history information for summarizing the status of type 2 diabetes; as adopted by general internal medicine. |
| **GIM IP AD Iron Def** | Custom group of orders to be added to an admission orderset to address iron deficiency on top of the admission problem |
| **EDM GIM UAC FU** | Letter template uniquely used by Internal Medicine Urgent Access Clinic in Edmonton zone. |

## Where can more information be found?

Changes and enhancements to these guides may appear in the Connect Care Physician Manual, Connect Care Help Files, or a Connect Care Learning Home Dashboard.

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