

Documentation in Epic

Streamlining your note writing workflow

HEALTH &
HARMONY

Epic

Learn more about documentation tools available in Epic, designed to optimize and improve your note writing process.

Key documentation tools



- **Notewriter:** Your central hub for creating and managing all patient notes within Epic.
- **SmartPhrases:** Boost efficiency and standardize documentation with shortcuts ("phrases"). Type a period and the phrase name to insert predefined text blocks. For example, ".hpi" inserts a formatted History of Present Illness section.
- **OpTime:** Document pre-operative assessments and surgical notes for post-operative review.
- **Dragon (speech-to-text):** Dictate directly into Epic using voice recognition. Dragon adapts to your voice, features a comprehensive medical vocabulary, and significantly improves note completion time. All physicians and ACPs will receive access to Dragon when they go live on Epic. **Be sure to download in advance of your [User Settings Lab](#).**
- **AQuity (for transcribed notes):** Voice file generated for Epic via telephony and transcribed via speech to text tool and scribe. Access and manage transcribed notes seamlessly within Epic (for select locations). *Note: all current provisioned physicians and ACPs will have access to AQuity once on Epic (including approved wave 1 practices and hospitals).*

Dragon setup + usage



1. Log into Epic.
2. Ensure your microphone is set up (PowerMic Mobile for phones or a plugged-in handheld microphone).
3. Position the microphone 1-3 inches from your mouth (or speak directly into your phone).
4. Tap the record button to start/stop dictation.
5. Speak naturally; Dragon filters "um" and "uh."
6. Dictate all punctuation ([see guide](#) for commands). Wait for the green microphone indicator before speaking.
7. Keep the Dragon window open to monitor dictation status. An orange light indicates a connection issue.

In locations where both Dragon and AQuity are available, physicians or ACPs may use their preferred tool.

Key Dragon commands

Navigation: "go to top," "go to end of sentence/paragraph," "go to bottom," "new line," "new paragraph"

Deletion: "select [text]," "scratch that" / "delete that," "undo that," "select all," "scratch that" / "delete that"

Dictation Box: "open/close dictation box"



Scan for
more resources

Documentation in Epic

Streamlining your note writing workflow



AQuity dictation process

- 1 Dial the dictation system.
- 2 Enter your Dictation Provider ID (no prefix; contact HIM Department if you need your Provider Dictation ID) followed by #.
- 3 Enter the Location Code followed by #.
All sites will now key a location code. Some sites will be required to key a different code than what they're used to for a given location.
- 4 Enter the Work Type followed by #.
- 5 Enter the Contact Serial Number
A Contact Serial Number (CSN) uniquely identifies a specific patient encounter, such as an ER visit, a surgery, or a clinic appointment. You can find the patient's Epic CSN by hovering over the patient's name in the Storyboard and seeing it in the info bubble that opens, just below MRN.
- 6 Enter the 6-digit Date of Service followed by #.
- 7 Begin dictation at the tone.

Detailed instructions are available near telephones, in physician lounges, operating rooms and within Health Information Management (HIM) departments.

The screenshot shows the Epic Summary page for a patient named Angie Orders. The patient's information includes: Female, 34 y.o., 5/23/1990, MRN: 204868, Bed: Master Pool 03, Code: FULL (no ACP docs). The Summary section displays: 34 y.o., 5/23/1990, Legal sex: Female, Marital status: Domestic Partner, Race: White, Ethnicity: Not Hispanic, Latino/a, or Spanish origin, Languages: English, 123 Somewhere St. MADISON WI 53703, MRN: 204868, CSN: 39706 (highlighted in a red box), HAR: 1000657. Contact information includes: 333-455-6666 (Work Phone), 554-987-6666 (Home Phone), and Alternate Contact Person: Orders, Mikayla (Mother), 324-346-4444 (Mobile). Unit: EMH MASTER PATIENTS, Bed: Master Pool 03.