Uploading Patient Education in Electronic Health Record (EHR) Systems

Contents

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Overview

Instructions

Boehringer Ingelheim has developed instructions that may assist organizations in uploading patient education into their EHR systems, including Allscripts TouchWorks®, Athenahealth®, Cerner®, eClincalWorks®, and Epic®. These instructions are for this purpose only and are not applicable to other EHR systems.

Considerations

- The customer shall be solely responsible for implementation, testing, and monitoring of the instructions to ensure proper orientation in each individual EHR system
- Capabilities, functionality, and setup (customization) vary among individual EHR systems. Boehringer Ingelheim shall not be responsible for revising the implementation instructions they provide to any customer in the event that customer modifies or changes their software or the configuration of their EHR system, after such time as the implementation instructions have been initially provided by Boehringer Ingelheim
- While Boehringer Ingelheim tests its implementation instructions on multiple EHR systems, the instructions are not guaranteed to work for all available EHR systems, and Boehringer Ingelheim shall have no liability thereto
- While EHRs may assist providers in identifying appropriate patients for consideration of assessment and treatment, the decision and action should ultimately be decided by a provider, in consultation with the patient, after a review of the patient's records to determine eligibility, and Boehringer Ingelheim shall have no liability thereto
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Background

Patient education is a key component of informing and engaging patients in their healthcare. EHRs currently make these resources available by leveraging third-party licensed content delivered through the EHR.

Although clinical staff may have access to these resources in the EHR, there may be instances in which existing resources do not meet the needs of specific patient populations. In addition, the option to provide patient education to other health information technology (HIT) solutions, such as the patient portal, may represent a great opportunity to help drive patient engagement.

Boehringer Ingelheim has created instructions for EHR systems to assist in uploading patient education into the EHR.

Notes

- These instructions may be provided to healthcare providers and institutions for their educational purposes
- The time commitment for the document upload is estimated to be 1 to 2 hours, but may vary by EHR system
- End users using the new resources should be informed of the availability, content, and target audience. Most likely, selected end users already use the described functionality for other conditions, so training may require minimal time and effort
- It is recommended that the delivery of educational resources to patients is incorporated in the organization's workflow and business and clinical practices

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Allscripts TouchWorks

Patient education may be uploaded to Allscripts TouchWorks in a number of ways. Although Allscripts TouchWorks comes with a large number of instructions, monographs, and patient education resources, the end user may consider adding new content.

Since CareGuides are popular to help manage and document chronic conditions, the update of patient education resources in the CareGuides may be a first logical step when uploading new resources. Alternatively, ad-hoc information may be added, potentially using text templates. Finally, the Orderable Item Dictionary (OID) may be updated (consider updating the OID).

EHR

CareGuides

Allscripts TouchWorks contains a library of CareGuides used to help manage patients. The CareGuide library of existing CareGuides may be modified to meet the institution's or clinician's preferences.

CareGuides consolidate different components into one central location for help in managing conditions. Patient Education/Instructions are a component of CareGuides.

To update the patient education component, select **Monographs** and **Instructions/Patient Education** and complete the desired edits.

Administrators may use the CareGuide Template Management workspace to manage CareGuide templates for an organization. Administrators may access the CareGuide Template Management workspace from the Physician Administration Tool (PAT).

Users can select items in a CareGuide, and then save them using a personal template for future use. The available CareGuide editing activities are controlled by a preference setting, which is set by the organization's administrator in **EHRAdmin/General** (allows advanced personal editing of CG templates).

Ad-hoc Patient Education Resources

A manual, ad-hoc option is available to add patient education resources. Text templates may be created in **PhysAdmin** and **TTemplates**. Select **New**, create a name according to the institution's naming conventions, and select the area where it will be used. After selecting the user groups, activate the content and save it.

Orderable Item Dictionary

The OID is the dictionary containing orderable items available for the institution. Patient education items may be found under **Instructions (OID)** → **Non-Medication** → **Instructions**. For manual updates, use **TWAdmin**, select **Dictionaries** → **Orderable Items** → **Non-Medication** → **Instructions** and complete the update.

Patient Portal

Documents may be forwarded to the patient portal FollowMyHealth. Set the preference in the FollowMyHealth dashboard to allow organizational interfacing with the EHR's patient education resources. Set the allowable document types to include documents (patient education resources, etc).

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Athenahealth

Within Athenahealth, patient education materials may be referred to as Educational Info Items and/or Clinical Papers. In addition, some practices may desire to upload the content as downloadable forms for the patient portal.

EHR

Clinical Paper Form

Upload the content (co-pay card, patient education)

1. Go to **Settings** → **Clinicals Admin** → **Clinical Paper Forms**
2. Name the content title
3. Choose the content document and select the correct extension as type
4. Effective and Expiration dates should be based on individual customer practice and policy
5. Choose **Patient** from dropdown
6. Check **Make Viewable in Portal**
7. Upload content
8. Click **Update**

Add Educational Order Form

1. Go to **Settings** → **Clinicals Admin** → **Order Configuration** → **Educational Info Order**
2. Set description and name
3. Choose **Clinical Paper Form** from dropdown
4. Click **Update**

Patient Portal

Manually add to the patient portal website

• A link with content (patient education) may be added into the clinical practice profile to allow for efficient patient download

Cerner

Cerner has multiple options to integrate patient education resources. Although there are different methods for adding and/or modifying resources, adding Custom Instructions is a popular choice. It is recommended to keep a backup of patient education content.

EHR

Custom Instructions

1. Custom Instructions may be added using the **PatEdContentManager.exe**

2. **Create the Custom Instructions** using a unique file name

3. Select the database and desired instruction file

4. Particular care should be observed using RTF files:

   • Do not create as a .doc file or converted from .doc file using Save As

   • Size should not exceed 5000 KB

   • If user elects to use an image, do not exceed 600 pixels wide and please use a JPEG format

5. The RTF file may be uploaded as a Custom Instruction using the **PatEdContentManager.exe** tool

Patient Instructions

1. In the Patient Education tree, find the **Treatment and Misc** folder

2. Select instructions titled **Template**

3. Enter the desired instructions. You can use copy and paste functionality

4. Save as **Custom Personal** or **Custom Public**

If new instructions need to be added to the content, consider a blank template that exists in **Patient Education.**

Patient Portal

Patient education resources may be published to the patient portal as part of the clinical visit summary. In addition, a custom page may be created to link to patient education content beyond the third-party solutions. To set up a custom page, open the **HealtheLife Administration Tool**. Select **Features** and select **Access Custom Pages**. Select a **Template** (eg, **Custom Pages**), enter the title and content, and **save.**

eClinicalWorks

eClinicalWorks has multiple options for adding patient education resources, allowing end users to select a method best aligned to their workflow.

EHR

Order Set

Order sets consolidate treatment options (prescriptions, labs, diagnostic imaging, procedures, patient education, referrals, etc) for a problem or diagnosis. Patient education resources may be added to existing or new order sets. To modify or create an order set and to set the patient education resources, follow these steps:

1. Select **Order Set Administration** from the EHR menu

2. Select **Edit existing order set** or **Create a new order set**

3. Set the other order set components as desired (treatments, etc)

4. Add the desired patient education resources (PDFs, hyperlinks, and/or attachments) by selecting **Add next** to the patient education header

5. Select the resource from the local drives to locate the patient education resource

6. Click **Save**

Treatment Section

Patient education resources may also be uploaded from the Treatment Section

1. Open the patient's progress note

2. Select **Treatment** in the note

3. Select **Education:** a pull-down menu will appear

4. Select **Custom Patient Education** from the menu

5. Search for the desired patient education resource, print as desired

Patient Portal

1. Using administrator rights, activate **Enabling publishing of patient education material** from the **Patient Portal setting window**

2. Select the patient education resource from the **Treatment window**

3. Click **Push to Portal** to upload the third-party education resource to the patient portal

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Epic

Epic has multiple options for adding patient education resources, allowing end users to select a method best aligned to their workflow.

EHR

SmartPhrase

1. Click the **Epic logo** and select **Tools**
2. Select **Management Console** and select **SmartPhrase Editor** option
3. Select **Create** tab
4. Choose a unique name and description
5. Set up the desired text (using other **SmartTools** if so desired) in the **General** tab. Formatting may be completed in the **General** tab
6. Select **Restrictions** tab to complete desired restrictions (eg, MR Patient Instructions for patient education). Further limitations (reason for visit, user, age, etc) may be added if desired
7. Release the newly created SmartPhrase record
8. Open a patient chart and select **Patient Instructions**
9. Use the previously created SmartPhrase to add the patient education resource
10. Consider printing the **After Visit Summary (AVS)** as future reference for the patient beyond the visit

References/Patient Education Library

1. Select **References** from **Visit Navigator**
2. The **Clinical References** library will open
3. Select the desired patient education resource and click **Add to Patient Instruction**
4. Additional edits may be made in the **Patient Instructions** tab window

Note: Several third-party patient education resources providers are available and offer licensed patient education libraries. Most vendors offer options to modify existing content or add custom content. Since patient education resources are licensed content, assistance from the technical account manager and/or a ticket may have to be created to modify existing libraries.

Patient Portal

1. Create the new patient education resource
2. Add the desired patient education resources to the patient's **After Visit Summary (AVS)**
   – The **AVS** may be attached to **MyChart** for future patient review