

- 1. In Web Client, select the Application Drawer icon and select Tables.
- 2. From the left pane, select **Clinical**.
- 3. Under the Patient Education Maintenance section, select Document Maintenance.



4. Select New.

Tables Patient Ed	ucation Documents List		Table	e Maintenance 🛛 🛛	Patient Education Documents List ×	^
😑 New 🍞 Ei	lit 🚑 Refresh					
58 : f10 MPEMR	IN HOSPITAL					
t Education	Document Search					
	Document Code v					
ant Cada A	Description A	C -1				
nent code 🔍	Description V	Category *				
	Elbow Bursitis Exercises	ORTHOPEDICS				
	Shin Splint Exercises	ORTHOPEDICS				
	Tennis Elbow Exercises	ORTHOPEDICS				
	Carpal Tunnel Syndrome Exercises	ORTHOPEDICS				
	Angina	CARDIOLOGY				
	Transient Ischemic Attack	GERONTOLOGY				
	Heart Attack	CARDIOLOGY				
	Heart Failure	CARDIOLOGY				
	Coronary Artery Disease	CARDIOLOGY				
	Mitral Valve Prolapse	CARDIOLOGY				
	Atrial Flutter	CARDIOLOGY				
	A-fib (Atrial Fibrillation)	CARDIOLOGY				
	Supraventricular Tachycardia	CARDIOLOGY				
	Mitral Valve Open Commissurotomy	CARDIOLOGY				
	Aortic Balloon Valvuloplasty	CARDIOLOGY				
	Chest Pain	CARDIOLOGY				
	Heart Palpitations	CARDIOLOGY				
	Mitral Stenosis	CARDIOLOGY				
	Mitral Regurgitation	CARDIOLOGY				
	Aortic Stenosis	CARDIOLOGY				
	Aortic Regurgitation	CARDIOLOGY				



5. The document **Code** will automatically populate. Select the **Category 1** dropdown and choose an option from the list. In the **Name 1** field, enter a description.

TruBridge Tables Patient Education Documents Maintenance	Table Maintenance S Patient Education Documents List	Patient Education Documents Maintenance \times
🖨 🖕 📮 Save 🍞 Edit 🔇 Delete 😨 Show Shared 🔌 Print 🔇 Add Code 🔇 Remove Code		
Facility 58 : f10 MPEMR IN HOSPITAL		
Patient Education Document Maintenance		
Code: 101143		
Category 1:		
Category 2:		
Category 3:		
Category 4:		
Name 1:		
Name 2:		
Name 3:		
Name 4:		
Name 5:		
Name 6:		
Name 7:		
Classification Codes		
Cade Ture A		
· · ·		

6. Select Add Code.

TruBridge	Tables Patient Education Documents Maintenance		Patient Education Documents Maintenance X
🔶 🛃 S	ave 📝 Edit 🙁 Delete 🔹 Show Shared 🔒 Print 🙋 Add Code 📀 Remove Code		_
Facility 58 : f	LO MPEMR IN HOSPITAL		
Patient Ed	ucation Document Maintenance		
Code:	101143		
Category 1:	PATIENT PORTAL ACCESS ~		
Category 2:	·]		
Category 3:	· · · · · · · · · · · · · · · · · · ·		
Category 4:	~		
Name 1:	Patient Portal		
Name 2:			
Name 3:			
Name 4:			
Name 5:			
Name 6:			
Name 7:			
Classificatio	in Codes		
Code 🗢	Code Type 🔶		



7. Enter the code in the applicable field (LOINC and ROI codes must be entered manually) or select the binoculars icon next to the field to search for a code by the code number or description. After adding the code, select **Save**; then select the blue back arrow to return to the Document Maintenance screen.

NOTE: In order to meet the "Provider to Patient Exchange: Provide Patients Electronic Access to Their Health Information" measure, a custom Patient Education Document must be created to provide the patient all of the details needed to view, download, or transmit their information. This document must be attached to the ROI/Purpose code for "Patient Possesses Info to Access Portal" that is set up in the ROI Control Record.

-	TruBridge Tables Patient Education Documents Maintenance	Table Maintenance	Patient Education Documents List 🛛 🗙	Patient Education Documents Maintenance ×
	💠 🛃 Save 🛃 Show Shared 😓 Print			
	Facility 58 : f10 MPEMR IN HOSPITAL			
	Classification Codes			
	Code: 101143			
	ICD 9 Diag:			
	ICD 9 Proc: 🦠			
	ICD 10 Diag:			
	ICD 10 Proc: *			
	LOINC:			
	SNOMED: *			
_	ROI: PIA			

- 8. Scroll to the bottom of the page. Under the **Edit Document** section, select **English** or **Spanish** from the **Language** dropdown.
- 9. Under the **Edited** column, select the radio button for the type of document you want to build (Pre-Care, General Information, Inpatient Care, Continuing Care, or Discharge Care).

-	TruBridge	Tables Patient Education Documents Maintenance	Patient Education Documents List	Patient Education Documents Maintenance \times
	* H	Save 🍞 Edit 🧿 Delete 😫 Show Shared 🔌 Print 😋 Add Code 👩 Remove Code		
	Name 4: Name 5: Name 6:			
	Name 7:			
	Classificat	tion Codes		
	Code 🔅	Code Type 🔅		
	PIA	ROI		
	Edit Docu	ment		
	Language:	English ~ Original Edited		
>	Pre-Care General Inf Inpatient C Continuing Discharge	formation O O O O O O O O O O O O O O O O O O O		



10. Select **Edit** on the action bar at the top of the screen.

M TruBridge	Tables Patient Education	Documents Mainte	enance			Table Maintenance 🛛 🛛	Patient Education Documents List	Patient Education Documents Maintenance X
🖻 🌸 🖷	Save 🍞 Edit 📀	Delete 🔀 Show	/ Shared 🔌 Print 🚯 Add Cod	le 🙁 Remove Code				
Name 4:					1			
Name 4.					J			
Name 5:					J			
Name 6:					J			
Name 7:]			
Classific	ation Codes				<u> </u>			
Code 💠	Code	Type 🌣						
PIA	ROI							
Edit Dee								
Cur Doc								
Language	e: English ~							
	Original	Edited						
Pre-Care	0	0						
General Ir	nformation 🔘	0						
Inpatient	Care 🔿	0						
Continuir	ng Care	0						
> Discharge	e Care 🔿	0						
Discitarge		~						

11. Microsoft Word should open automatically. Copy and paste your text and images into the document.

NOTE: Images must saved as jpegs before being added to the document, and the entire document size cannot exceed 10MB. To check the size of the document, select **File > Info**; then refer to the **Size** value under **Properties**.

12. Select File > Save to save the Word Document; then select the X to close Microsoft Word.

MutoSave Off ☐ ∽ ひ マ usr3_f_micro	_ND101136d - Compatibility Mode 🗟 🗸	♀ Search
File Home Insert Draw Design Layout Refe	rences Mailings Review View Help Acrobat	
Paste ✓ Gorrat Painter ✓ Growat Painter ✓ Galibri (Body) → 12 → A B I U → ab x₂ x² A	Υ Α΄ Αα ~ Αϕ Ε ~ Ε ~ Ψ ~ Ε Ξ Δ↓ ¶ Α ~ ∠ ~ Α ~ Ε Ε Ε Ε ΙΕ ~ Δ ~ Ε ~	Normal No Spacing Heading 1 Heading 2
Clipboard 🖪 Font	ی Paragraph ک	Styles
	Thank you for choosing Tru provide you with excellent o	Patient Portal Access Bridge Hospital as your provider of medical s care and hospitality. In compliance with the



w u		ND101136d - Co	ompatibility Mode	6				
¢		Good	afternoon					
⋒ Hor	me	~ New						
🗋 Nev	v							
🗁 Оре	en				Take a tour		Insert your first Table of contents	
Info	,				÷			
Save	e	E	llank document	w	elcome to Wo	rd Insert yo	our first table o	of cont
Save	e As							
Save PDF	e as Adobe :	م]	Search					

13. When prompted to save and exit from the document editor, select Yes.



14. Select **Save** on the action bar at the top of the screen.





15. Select the blue back arrow to return to the Clinical Tables screen; then select Rebuild Indexes.

-	TruBridge Clinical		♠ ९ 箇 昂 啰 🤋 🏨 😖 ▾
	Clinical Facility: 10 MPEMR IN HOSPITAL ~		Î
	Clinical Decision Support	Patient Education Maintenance	Physician Application
120	CDS Alert Configuration (Legacy)	Document Maintenance	Clinical Monitoring
Đ	Decision Support Interventions	Create a New Document	Reminders
	DSI Provisioning	P Update User-Defined Documents	3 Physicians
R	DSI Configuration	Rebuild Indexes	Physician Documentation Titles
_	Clinical Documentation	Setup Cover Page	Physician Documentation Header
-	Signature Statements	Pharmacy Control	Physician Documentation Templates
-	P Department Categories	Alternating Comp. Table	Physician Documentation Sections
B	Flowcharts / Pathways / Documents	Charges Pricing Table	Physician Documentation Instructions
_	Fostions (Questions List	Clinical Monitoring	Physician Documentation Scripting
· · ·	Sections/Questions List	Control Information	Physician Security
Ð	Report Department Categories	Custom TDN Notor	Physician Group
	Backup Reports By Department	Custom Printees Dietary Classes	Problem List Type