



# **Patient Education Documents User Guide**

# Patient Education Documents User Guide

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## Chapter 1 Introduction

### 1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. TruBridge EHR Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on TruBridge EHR's interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client's attestation, TruBridge bears no responsibility for attestation information submitted by the client.

### 1.2 Overview

Patient Education Documents allows the user to select and print patient education documents for the patient. This app utilizes the Micromedex CareNotes™ database. Quarterly updates ensure that providers have the latest patient care information available. These documents provide patients with education ranging from general information about a topic to discharge instructions. The documents are written at a 6th - to 8th-grade reading level in English and Spanish. Patient Drug Information is also accessible via the Patient Education Documents application.

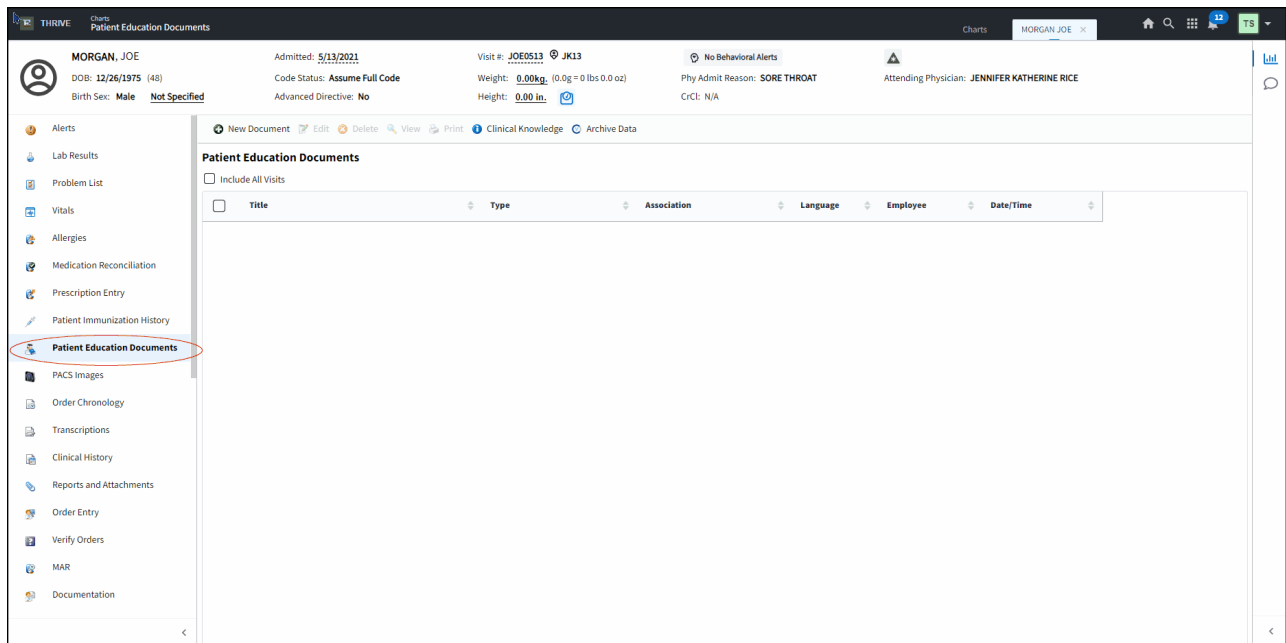
#### Getting Started

To ensure your site is set up properly for using Patient Education Documents, please review the following:

- For table maintenance and setup in TruBridge EHR, see the [Table Maintenance - Clinical](#) user guide.
- The Patient Drug Information available in Patient Education Documents is available via the Clinical Monitoring application.
- Facilities outside of the United States may choose an alternate date format of MMDDYY, DDMMYY, or YYMMDD to be used on all date fields in the Patient Education Documents Application. If desired, contact an TruBridge EHR Support Representative for the date format at your site to be changed.
- When the **Clinical Knowledge** button is accessed, users are automatically logged into Truven™ to access additional content, purchased from Truven™. For more information, contact an TruBridge EHR Support Representative.

#### To Access Patient Education Documents

Once you have selected a patient (from the Tracking Board, Whiteboard, or by searching for a patient name), click the **Patient Education Documents** option in the left hand menu. The Patient Education Documents screen is displayed. If there are existing education documents on the patient record, they are displayed here.



Accessing the Patient Education Documents Application

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## Chapter 2 Existing Documents

### 2.1 Working with Existing Documents

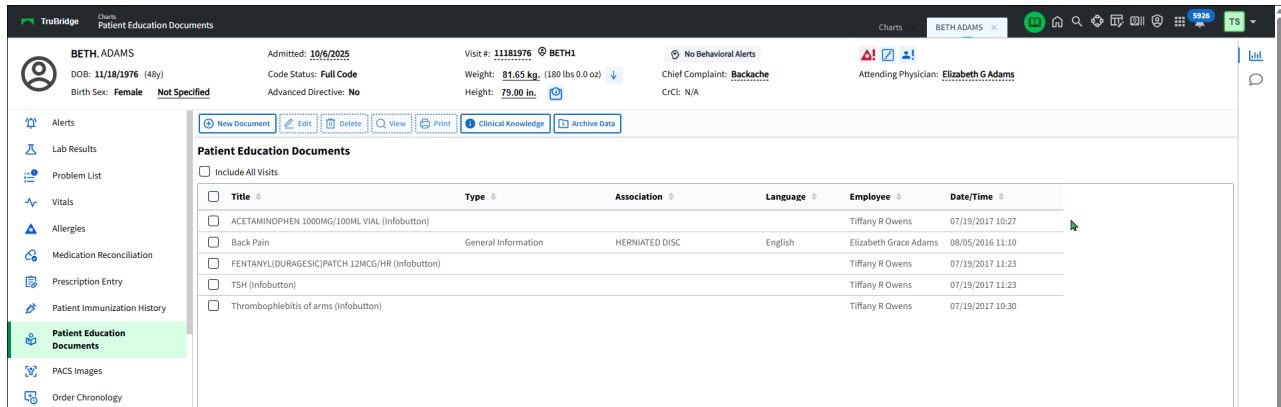
When you access the Patient Education Documents grid for a specific patient, existing documents for the visit are displayed in the grid. To include documents for all visits, select the **Include All Visits** check box. From this list, you can perform several different actions. Select the topic(s) by checking the check box next to the title of the document. Then, select one of the following buttons:

- **View** - This displays a PDF document in a viewer. This can only be done for a single document at a time. To print from this view, select the printer icon.
- **Print** - This displays the **Select a printer** screen. Select the desired printer and click **OK**. TIP: Double-clicking the desired printer also sends the selected document(s) to the printer. An alternate way to print would be to select **View** and print using the printer icon in the PDF viewer.
- **Delete** - This option deletes the selected document(s) from the patient education list. NOTE: There is no warning message. Once you select the **Delete** button, the documents are deleted from the record.
- **Archive Data** - This option launches the Galen Vital Center Online for archiving.
- **Access Additional Clinical Knowledge** - Select the **Clinical Knowledge** button. This launches the Clinical Knowledge screen where you can view additional education documents using a database. In the **List** field, select a category. Then, in the **Document Type** field, select the type of document you are looking for. From the list, select the blue information (i) button to display documents related to that topic. (NOTE: It may take a few seconds for the list to display due to retrieving them from the database.) Once the documents are displayed, select the desired document and then click the **Select** button to view it. Once the document is displayed, you can save the document to the patient documentation list (**Save** button) or you can print the document and save it to the record at the same time (**Print/Save** button). Or, click the blue back arrow button to return to the previous screen. See the [Clinical Knowledge](#) section for additional information.
- **Add a New Document** - To add a new education document to the patient education list, click the **New Document** button. See the [New Document](#) section for addition step by step instructions.

## Chapter 3 New Patient Education Documents

### 3.1 Adding a Document

From the main Patient Education Documents window, select **+ New Document** to begin. The Patient Education Document Search screen is displayed.



- Search for an Education Topic:** There are several ways to browse for patient education topics. In the **Search** field, select the option that works best for the document you are looking for:
  - Patient-Specific:** This is the default selection and provides a list of education documents related to the patient's problem list, medication list, and ordered lab tests. Use the **Category**, **Type**, **Language**, and **Keyword** fields to further refine your search. Once the related topics are displayed, you can select **Include Resolved Problems** or **Include DC'd Medications** to include those items in the list.
  - By Category:** Selecting this option requires that you make a selection in the **Category** field. The **Category** field lists categories of topics available in the education database. Select the appropriate category. Then, type the text you are looking for in the **Keyword** field. Items that match the keyword text found in the category you selected are displayed. Use the **Type** and **Language** fields to further refine your search. Once the related topics are displayed, you can select **Include Alternate Titles in Keyword Search** to include additional topics that include the keyword you typed in the **Keyword** field. A topic has a main title or name that appears on the related education documents and up to six additional descriptions that may be used as search terms. NOTE: If you select the **Include Alternate Titles in Keyword Search** check box while searching by Category and then switch to Custom (or vice-versa), the **Include Alternate Titles in Keyword Search** check box remains checked.
  - Custom Create Documents:** This option displays site-specific custom documents and documents that have been modified for the patient. Use the **Category**, **Type**, **Language**, and **Keyword** fields to further refine your search. Once the related topics are displayed, you can select **Include Alternate Titles in Keyword Search** to include additional topics that include the keyword you typed in the **Keyword** field. A topic has a main title or name that appears on the related education documents and up to six additional descriptions that may be used as

search terms. NOTE: If you select the **Include Alternate Titles in Keyword Search** check box while searching Custom documents and then switch to Category (or vice-versa), the **Include Alternate Titles in Keyword Search** check box remains checked.

- [Lab Tests](#): Selecting this option displays documents associated with the patient's resulted lab tests (to display here, the lab item must have an associated LOINC code in the hospital item master. Use the **Type**, **Language**, and **Keyword** fields to further refine your search.
  - [Problem List](#): This option displays topics associated with the ICD-9 and ICD-10 codes on the patient's Problem List. Use the **Type**, **Language**, and **Keyword** fields to further refine your search. Once the related problem topics are displayed, you can select **Include Resolved Problems** to include problems on the patient record that are marked as Resolved.
  - [Drug Information](#): Selecting this option displays a list of medication education documents based on the patient's home medications as well as active medications. Use the **Category** and **Language** fields to further refine your search. Once the related topics are displayed, you can select **Include DC'd Medications** to include those items in the list.
2. **Select the Topic(s) and Add to Pending List**: Select a single or multiple topics using the check boxes. Then, select **Add to Pending** (located above the Patient Education Document Search window). Or, you can double-click a single topic to add it to the Pending Documents List (located to the right of the screen). Repeat the search process using the information in step 1 to add more documents to the Pending List.
  3. **Move, View, or Print Topics on the Pending List**: From the Pending List, select one or multiple topics and then select any of the following options:
    - **Update Pending** - This option adds the selected documents to the patient's Patient Education Document list.
    - **View Selected** - This option displays the document in a viewer. Only one document can be viewed at a time. If multiple documents are selected, the View Selected button is disabled.
    - **Print Selected** - This displays the **Select a printer** screen. To print to the current workstation printer, select the **Workstation** button. Or, select the desired printer and click **OK**. TIP: Double-clicking the desired printer also sends the selected document(s) to the printer.
    - **Remove** - This option removes the document from Pending List. NOTE: There is no warning message. Once you select the **Remove** button, the document is removed.
    - **Clear All Pending** - This option clears the pending list of all topics. NOTE: There is no warning message. Once you select the **Clear All Pending** button, the documents are removed.
  4. Once you have finished adding documents, click the blue back arrow button to return to the Patient Education List. The documents you added are now displayed in the patient's education list. You can do perform several actions with the documents on the list. See the [Working with Existing Documents](#) section for details.

## Patient Specific

The Patient Specific search option is the default selection and provides a list of education documents related to the patient's problem list, medication list, and ordered lab tests.

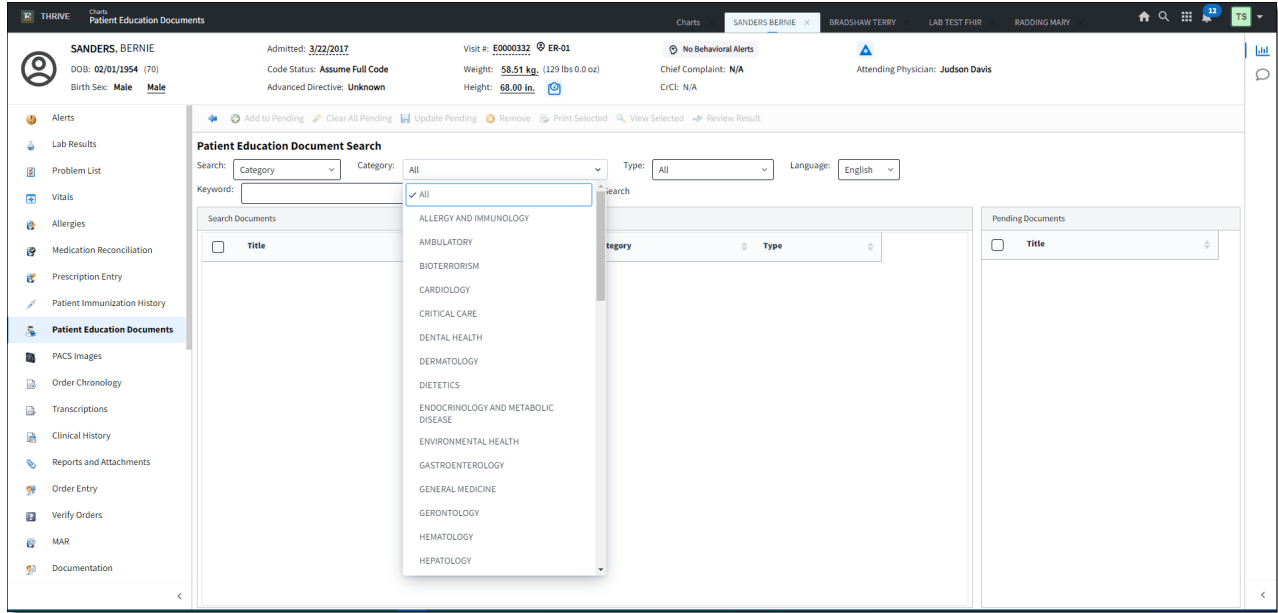
The screenshot shows the 'Patient Education Documents' search interface for patient SANDERS, BERNIE. The search is set to 'Patient Specific' and shows a list of 15 education documents related to asthma. The documents are listed in a table with columns for Title, Category, Type, Source Description, and Source Type. The documents are sorted alphabetically by title.

Title	Category	Type	Source Description	Source Type
<input type="checkbox"/> How to Use a Peak Flow Meter	PULMONOLOGY	General Information	ASTHMA	Problem
<input type="checkbox"/> How to Use a Peak Flow Meter	PULMONOLOGY	Discharge Care	ASTHMA	Problem
<input type="checkbox"/> How to Use a Peak Flow Meter	PULMONOLOGY	Continuing Care	ASTHMA	Problem
<input type="checkbox"/> Exercise-Induced Bronchoconstriction	PRIMARY CARE	General Information	ASTHMA	Problem
<input type="checkbox"/> Exercise-Induced Bronchoconstriction	PRIMARY CARE	Continuing Care	ASTHMA	Problem
<input type="checkbox"/> How to Use an Incentive Spirometer	SURGERY	General Information	ASTHMA	Problem
<input type="checkbox"/> How to Use an Incentive Spirometer	SURGERY	Discharge Care	ASTHMA	Problem
<input type="checkbox"/> How to Use an Incentive Spirometer	SURGERY	Continuing Care	ASTHMA	Problem
<input type="checkbox"/> How to Use a Metered-Dose Inhaler	PEDIATRICS	General Information	ASTHMA	Problem
<input type="checkbox"/> How to Use a Metered-Dose Inhaler	PEDIATRICS	Discharge Care	ASTHMA	Problem
<input type="checkbox"/> How to Use a Metered-Dose Inhaler	PEDIATRICS	Continuing Care	ASTHMA	Problem
<input type="checkbox"/> How to Use a Dry-Powder Inhaler	PEDIATRICS	General Information	ASTHMA	Problem
<input type="checkbox"/> How to Use a Dry-Powder Inhaler	PEDIATRICS	Discharge Care	ASTHMA	Problem
<input type="checkbox"/> How to Use a Dry-Powder Inhaler	PEDIATRICS	Continuing Care	ASTHMA	Problem
<input type="checkbox"/> Bronchospasm	ENVIRONMENTAL HEALTH	General Information	ASTHMA	Problem

Patient Specific

## Category

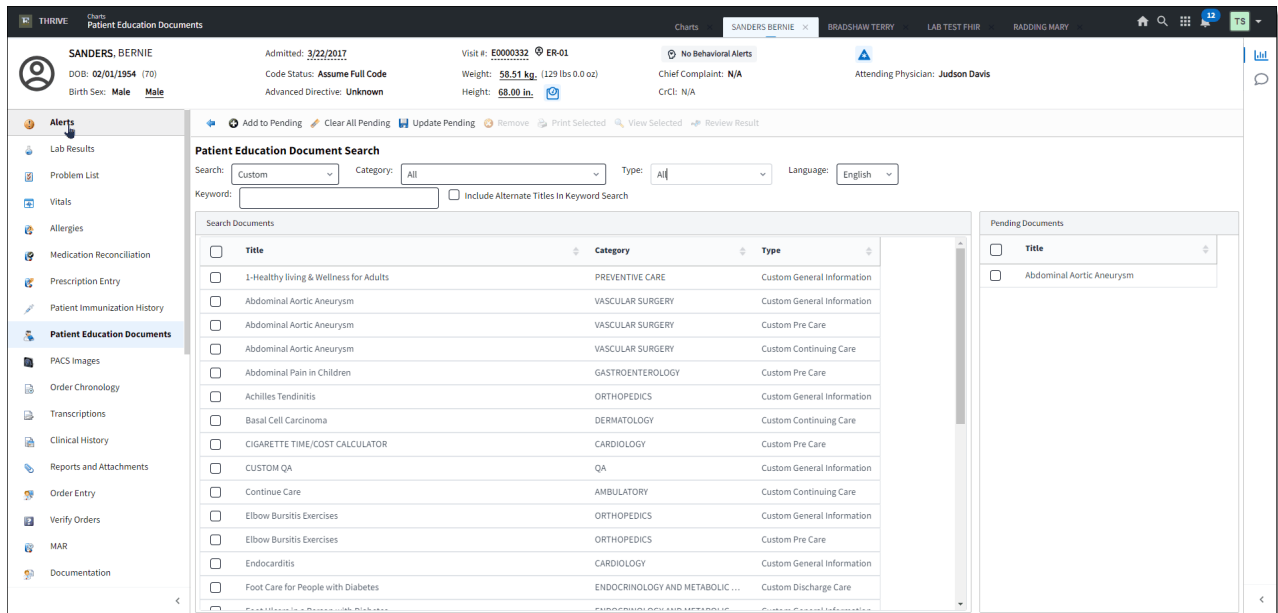
Selecting this option displays topics by a pre-determined list of categories. Once you select the **Category** option from the **Search** field, you must make a selection in the **Category** field to display the available topics in that category from the education database. Categories are listed alphabetically. Topics may be included in up to four categories for search purposes. Use the **scroll bar** to view the entire list. Single-click to select a category from the list.



Category List

### Custom

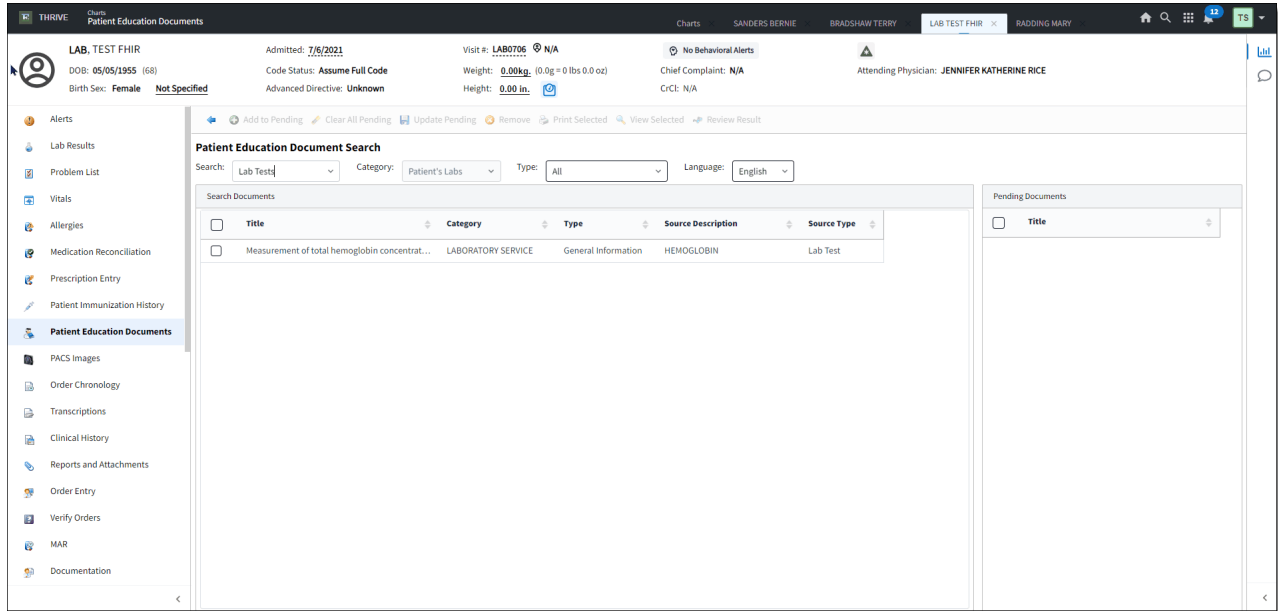
The **Custom** search option displays site-specific custom documents or documents that have been customized for the patient. For this option, it is best to use the **Type** and **Keyword** fields to refine the list and locate the topic you are looking for.



Patient Education Custom

## Lab Tests

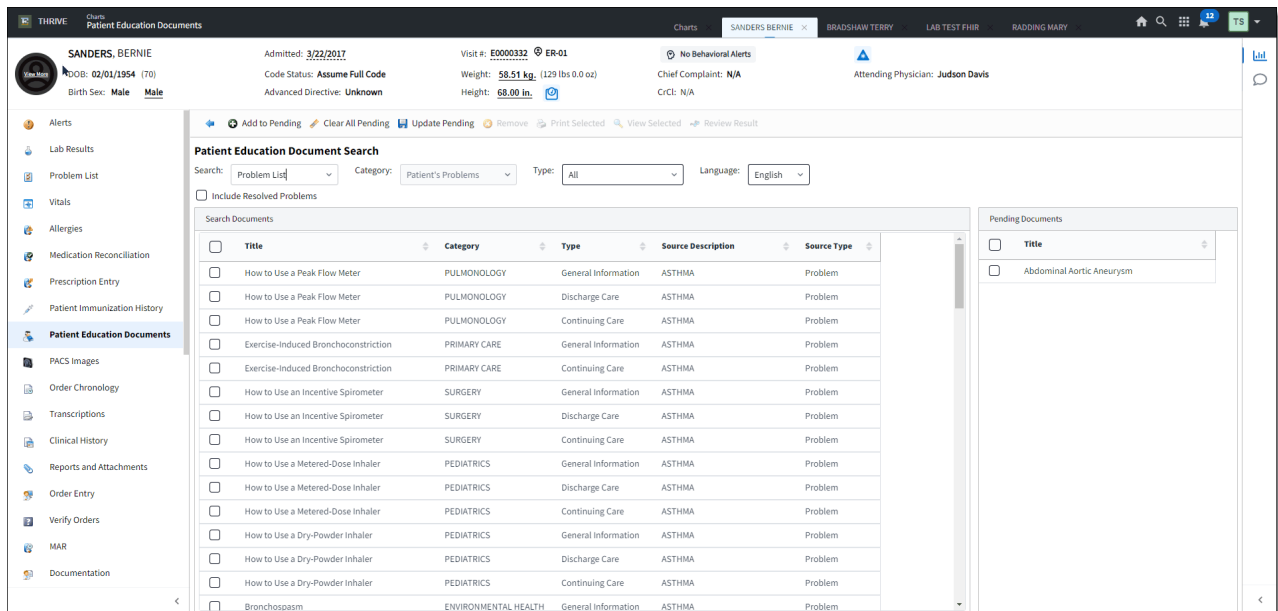
Selecting this option displays documents associated with the patient's resulted lab tests (to display here, the lab item must have an associated LOINC code in the hospital item master).



Lab Tests

## Problem List

This option displays topics associated with the ICD-9 and ICD-10 codes on the patient's Problem List.



Problem List

## Drug Information

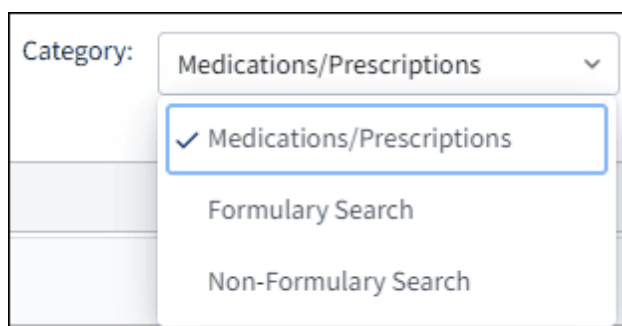
Selecting this option displays a list of medication education documents based on the patient's home medications as well as active medications.

The screenshot shows the 'Patient Education Documents' interface for patient SANDERS, BERNIE. The search criteria are set to 'Drug Information' and 'Medications/Prescriptions'. The search results table is as follows:

Title	Category
<input type="checkbox"/> LOVENOX (ENOXAPARIN) 5YR 80MG/0.8ML	Active Med
<input type="checkbox"/> Albuterol Inh./Neb Solution 0.042%	Prescription
<input type="checkbox"/> tramadol HCl Oral Cap ER 100MG	Prescription
<input type="checkbox"/> Revlimid Oral Capsule 10MG	Prescription
<input type="checkbox"/> Ambien Oral Tablet 5MG	Prescription
<input type="checkbox"/> Velcade Inj Powder for Solution 3.5MG	Prescription

Drug Information

It is recommended to use the **Category** field to refine your search based on the Formulary, Non-Formulary, or Medications/Prescription options to more easily find the appropriate document.



Category Drop-down Menu

## 3.2 Using Clinical Knowledge

The Clinical Knowledge database is used to view education documents based on the patient's lab results, medications, prescriptions, and active and resolved problems. LOINC codes must be entered on lab items and associated reference range for the item in order to pull to the display list. In addition, Clinical Knowledge provides Truven data, which looks at the age, gender, and language to narrow down documents that are relevant to that patient. To access, select **Clinical Knowledge** from the Patient Education Documents Main Menu. These documents will also be available in the

Patient Portal. When Clinical Knowledge documents are saved, the SNOMED codes that are attached to a document are saved and can then be used by other applications such as Quality Measures.

**NOTE:** There is a way for sites to access additional/greater content, purchased from Truven™, through TruBridge EHR. For more information, contact a TruBridge EHR support representative.

1. To access the Clinical Knowledge database, select a patient, go to the **Patient Education Documents** screen, and select the **Clinical Knowledge** button. The Clinical Knowledge list is displayed.

To navigate back to the Patient Education Documents page, select the blue back arrow. To change the language of the printed documents, select the **Change Preferred Language** button, which displays the **Patient Demographics - Personal** screen to update the patient's **Preferred Language**. This updates the Preferred Language that displays on the Clinical Knowledge main screen. Documents may be printed/viewed in different languages when the documents are available in those languages. Languages include; Arabic, Chinese (Simplified), Chinese (Traditional), English, French (Canadian), German, Italian, Japanese, Korean, Polish, Portuguese (Brazilian), Russian, Spanish, Turkish, and Vietnamese.]

#### Patient Education Documents > Clinical Knowledge

2. The list is displayed in alphabetical order and the **List** field defaults to **All**, which includes the patient's lab results, medications, prescriptions, active and resolved problems. If a result is included in a lab panel, the lab panel and associated results will display separately for selection. Select an option in the **List** field to display related knowledge items:

- **Active Problems:** View only active problems on the Problem List.
- **Labs:** View completed/resulted lab tests/results, along with the test value and units. This information pulls from the LOINC code setup on the reference range. If a resulted value falls outside of the reference range for the item, the following will display to the right of the value:

- **H:** High
  - **HC:** High Critical
  - **L:** Low
  - **LC:** Low Critical
  - **Medications:** View discontinued and active medications.
  - **Prescriptions:** View active prescriptions.
  - **Resolved Problems:** View resolved problems on the Problem List.
3. The **Document Type** field defaults to **All**. Use this field to select an option to narrow the list using the following options:

**NOTE:** The **Document Type** drop down is disabled if the user selects any of the following **List** options: **Lab Tests, Medications, or Prescriptions**.

- **AfterCare:** This option should default for ER stay types. When this option is selected, only documents that have AfterCare instruction versions are displayed.
  - **Ambulatory Care:** This option should default for Clinic stay types. When this option is selected, only documents that have Ambulatory Care instruction versions are displayed.
  - **Discharge Care:** When this option is selected, only documents that have Discharge Care versions are displayed.
  - **General Information:** When a document is selected with this type, only documents that have General Information are displayed.
  - **Inpatient Care:** When a document is selected with this type, only documents that have Inpatient Care information are displayed.
  - **Precare:** When a document is selected with this type, only documents that have Precare information are displayed.
4. Select the Info button (blue "i" icon - see image above) to the right of the item to view the related document topics. If a lab test includes multiple results, the results will display independently of the lab test for selection. The Related Documents screen displays the Document Title and a Related Phrase.

The screenshot shows the THIRIVE Patient Education Documents interface for patient MULDER, FOX. The patient's information includes DOB: 11/30/1964 (59), Admitted: 7/27/2020, Visit #: 20001496, Weight: 99.79 kg, Height: 68.00 in., and Attending Physician: DR ASHLEY DEVERY PHYS QA. The left sidebar lists various medical categories, with 'Patient Education Documents' selected. The main content area displays a table of 'Related Documents'.

Document Title	Related Phrase
ACUTE HEADACHE	ACHING HEADACHE
ALLERGIC RHINITIS	ACUTE EXACERBATION OF ASTHMA CO-OCCURRENT WITH ALLERGIC RHINITIS
BACTERIAL MENINGITIS	ACUTE ADRENAL INSUFFICIENCY WITH MENINGOCOCCAEMIA
CHRONIC POST TRAUMATIC HEADACHE	NONPSYCHOTIC POST-TRAUMATIC BRAIN SYNDROME
COLD SYMPTOMS	ACUTE CORYZA
DRIVING RESTRICTIONS	DIFFICULTY DRIVING A CAR
FUNGAL MENINGITIS	CEPHALALGIA
GENERAL HEADACHE	ACHING HEADACHE
INFLUENZA	ACTIVE IMMUNISATION
MOTOR VEHICLE ACCIDENT	INJURY DUE TO MOTOR VEHICLE ACCIDENT
NEAR SYNCOPE	ARRHYTHMIA
NECK EXERCISES	ACUTE CERVICAL SPRAIN
TENSION HEADACHE	HEADACHE DISORDER
VIRAL MENINGITIS	ABACTERIAL MENINGITIS

### Related Documents

5. Select a topic title by double-clicking (or selecting the item and selecting the **Select** button) to display the available education documents.

The screenshot shows the THIRIVE Patient Education Documents interface for patient MULDER, FOX. The patient's information is the same as in the previous screenshot. The left sidebar remains the same. The main content area displays a table of 'Selected Document'.

Document Title	Document Type	Language
ALLERGIC RHINITIS	General Information	English
ALLERGIC RHINITIS	Ambulatory Care	English

### Selected Document

6. Select a document by double-clicking (or selecting the item and selecting the **Select** button) to view the document. The document is displayed in the viewer. From here, you can **Print/Save** or **Save**. User will not be able to edit Clinical Knowledge documents. However, Clinical Knowledge documents may be deleted from the main Patient Education Documents screen. Copyright information will print at the bottom of the document.

- **Print/Save:** To print and save the document at the same time. Displays the **Select a printer** screen where you can select a printer and then saves the document to the patient's education list.
- **Save:** To save the document to the patient's education list.

The screenshot displays the THIRVE Patient Education Documents interface. At the top, patient information for MULDER, FOX is shown, including DOB (11/30/1964), Admitted date (7/27/2020), and various clinical alerts. A left sidebar contains navigation options such as Alerts, Lab Results, Problem List, Vitals, Allergies, Medication Reconciliation, Prescription Entry, Patient Immunization History, Patient Education Documents (highlighted), PACS Images, Order Chronology, Transcriptions, Clinical History, Reports and Attachments, Order Entry, Verify Orders, MAR, and Documentation. The main content area shows a PDF document titled 'Allergic Rhinitis' with the following text:

**WHAT YOU NEED TO KNOW:**  
**What is allergic rhinitis?** Allergic rhinitis, or hay fever, is swelling inside your nose caused by an allergen. An allergen can be anything that causes an allergic reaction. Allergies to weeds, grass, trees, or mold often cause seasonal allergic rhinitis. Indoor dust mites or pet dander can also cause allergic rhinitis.

**What are the signs and symptoms of allergic rhinitis?**

- Sneezing, coughing, or clearing your throat often
- Runny, stuffy, or itchy nose
- A sore or scratchy throat
- Red, itchy, watery eyes
- Severe tiredness
- Dark circles under your eyes
- Rash or hives
- Headache
- Postnasal drip (nasal drainage down the back of your throat)

**How is allergic rhinitis diagnosed?** Your healthcare provider will ask about your symptoms and examine you. Tell the provider if you know which allergens trigger your symptoms. You may need any of the following:

- A **skin prick test** may show what you are allergic to. A provider lightly pricks or scratches your skin with tiny amounts of a possible allergen. The provider watches to see how your skin reacts. If a bump appears within a few minutes, you are likely allergic to the allergen.
- A **blood test** may show what you are allergic to.
- A **nasal swab** may be used to test fluid from your nose. This fluid may show which allergen are causing your symptoms.
- A **rhinoscopy** is used to check for polyps or a foreign body in your nose. Your provider will use a rhinoscope to look inside your nose. A rhinoscope is a thin, bendable tube with a light and camera on the end.

### Clinical Knowledge Document

**NOTE:** Patient Audit Log will show Save, Print, and Delete actions.

## Chapter 4 Table Maintenance - Clinical

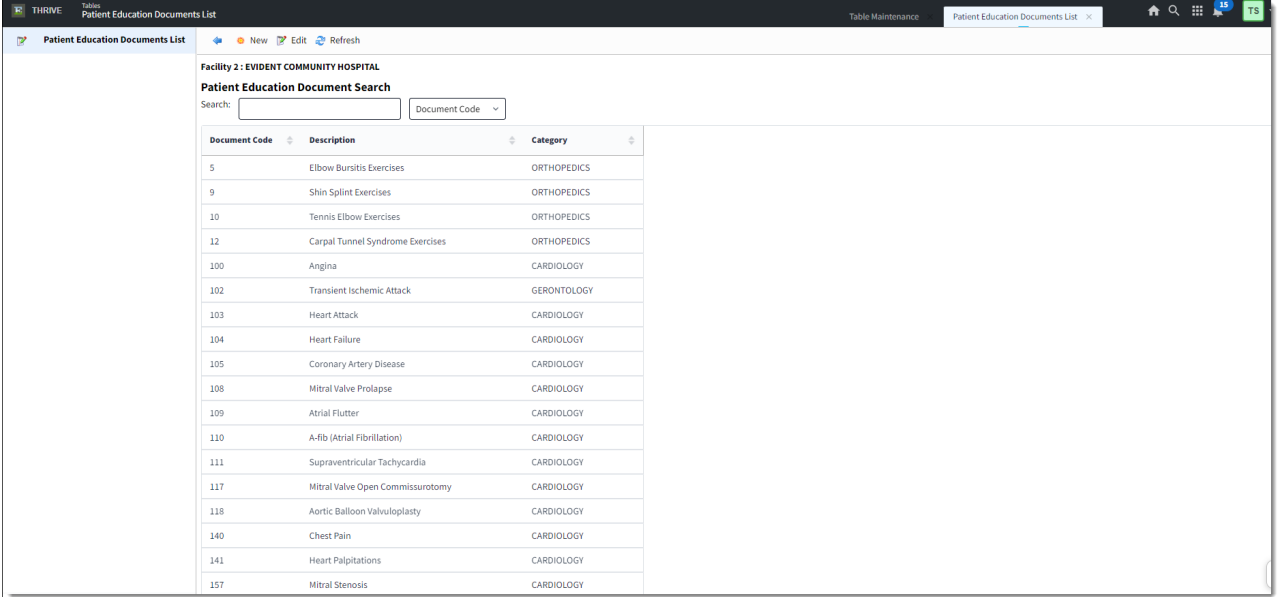
### 4.1 Table Maintenance Overview

This section discusses setup areas available via Table Maintenance. To access Patient Education Maintenance in the Clinical section of Table Maintenance, go to **Web Client > Tables > Clinical > Patient Education Maintenance**

### 4.2 Document Maintenance

To perform maintenance on an existing document, select **Document Maintenance**.

Select **Web Client > Tables > Clinical > Document Maintenance**. The Patient Education Document Search window is displayed.



The screenshot shows the 'Patient Education Document Search' window. At the top, it says 'Facility 2: EVIDENT COMMUNITY HOSPITAL'. Below that is a search bar with a 'Search:' label and a 'Document Code' dropdown menu. The main area contains a table with the following data:

Document Code	Description	Category
5	Elbow Bursitis Exercises	ORTHOPEDECS
9	Shin Splint Exercises	ORTHOPEDECS
10	Tennis Elbow Exercises	ORTHOPEDECS
12	Carpal Tunnel Syndrome Exercises	ORTHOPEDECS
100	Angina	CARDIOLOGY
102	Transient Ischemic Attack	GERONTOLOGY
103	Heart Attack	CARDIOLOGY
104	Heart Failure	CARDIOLOGY
105	Coronary Artery Disease	CARDIOLOGY
108	Mitral Valve Prolapse	CARDIOLOGY
109	Atrial Flutter	CARDIOLOGY
110	A-fib (Atrial Fibrillation)	CARDIOLOGY
111	Supraventricular Tachycardia	CARDIOLOGY
117	Mitral Valve Open Commissurotomy	CARDIOLOGY
118	Aortic Balloon Valvuloplasty	CARDIOLOGY
140	Chest Pain	CARDIOLOGY
141	Heart Palpitations	CARDIOLOGY
157	Mitral Stenosis	CARDIOLOGY

**Document Maintenance**

The grid displays the following information:

- **Document Code:** Displays the topic code of up to six digits.
- **Description:** Displays the topic description.
- **Category:** Displays the category to which the topic is assigned.

The default sort is numerical by Document Code. You can search using one of the three available drop-down searches: **Document Code**, **Description** or **Category**. Key the search term in the **Search** field, then select the search type from the drop-down menu to sort the list. The list may also be sorted by selecting a column header. Use the vertical scroll-bar to view the entire display list.

From the Patient Education Document Search screen, you can access the following actions:

- **New:** Select this option to create a custom document. See [Create a New Document](#) for setup options.
- **Edit:** Select this option to modify an existing document. See [Editing an Existing Document](#).
- **Refresh:** Select this option to manually update the selection list if a documented is created or edited.
- **Blue Back Arrow:** Select this option to return to the previous menu.

### Editing an Existing Document

To access the maintenance screen, select the topic and then select **Edit**. The Patient Education Document Maintenance screen is displayed.

**Facility 2: EVIDENT COMMUNITY HOSPITAL**

**Patient Education Document Maintenance**

Code: 5

Category 1: ORTHOPEDICS

Category 2: SPORTS MEDICINE

Category 3: PHYSICAL THERAPY

Category 4: AMBULATORY

Name 1: Elbow Bursitis Exercises

Name 2: ACUTE BURSTITIS

Name 3: BURSTITIS, ACUTE

Name 4: INFECTED BURSA

Name 5: INFLAMMATION OF BURSA

Name 6: INFLAMMATION OF BURSA OF OLECRANON

Name 7: CAPPED ELBOW

Code	Code Type
72633	ICD-9
M06	ICD-10
M062	ICD-10

**Patient Education Document Maintenance**

For the selected document, you can review or edit the following fields:

- **Code:** Topics are assigned a unique code up to six digits long. This field cannot be edited.
- **Category 1 - 4:** Topics may be assigned to up to four categories for searching purposes. If a custom document has been selected, the **Category** fields may be modified. Select **Save** on the action bar to save changes. Categories cannot be edited for documents provided by Micromedex.
- **Name 1 - 7:** The topic description is displayed in field 1. Fields 2 through 7 are utilized for alternate search terms. If a custom document has been selected, the **Name** fields may be modified. Select **Save** on the action bar to save changes. Names cannot be edited for documents provided by Micromedex.

- **Classification Codes:** The Code and Code Type, including ICD-9, ICD-10, LOINC and/or SNOMED codes, associated with the topic are displayed in this field (if applicable). If a custom document has been selected, codes may be added or removed using the **Add Code** and **Remove Code** options on the action bar. See [Create a New Document](#) for additional information. Classification Codes cannot be edited for documents provided by Micromedex.
- **Edit Document:** This section provides access to edit the document. In the **Language** field, select **English** or **Spanish** to identify the version of the document to be viewed/edited.
  - To view the original version of a Micromedex document, select the radio button in the **Original** column for the document type, then **Edit** on the action bar. The document is displayed for editing.
  - To view the edited version of a Micromedex or custom document, select the radio button in the **Edited** column for the document type then **Edit** on the action bar. The document is displayed for editing.
  - See [Create a New Document](#) for additional information on custom documents. Original Micromedex documents must be modified via Patient Education Maintenance. See Document Maintenance.
- **Delete Document:** To delete a custom document, select the radio button in the **Edited** column for the document type then **Delete** on the action bar. Original documents provided by Micromedex may not be deleted.

In addition, you have the following options available via the action bar at the top of the grid:

- **Show Shared:** This option will display setup being shared by multiple facilities.
- **Print:** Select this option to print the setup selections for the document.
- **Back Arrow:** Select this option to return to the previous screen.

### **Create a New Document**

To create a new topic and its corresponding documents, select **New** from the Patient Education Document Search window.

THRIVE  
Patient Education Documents Maintenance

Table Maintenance Patient Education Documents List Patient Education Documents Maintenance

Save Edit Delete Show Shared Print Add Code Remove Code

Facility 2: EVIDENT COMMUNITY HOSPITAL

Patient Education Document Maintenance

Code: 101142

Category 1:

Category 2:

Category 3:

Category 4:

Name 1:

Name 2:

Name 3:

Name 4:

Name 5:

Name 6:

Name 7:

Classification Codes

Code	Code Type

### Patient Education Documents

For the new document you are creating, enter the appropriate information in the following fields:

- **Code:** Topics are assigned a unique code up to six digits long. This field cannot be edited.
- **Category 1 - 4:** You can select up to 4 categories to be used for search purposes. In the **Category 1** field, select the appropriate category. Repeat as needed in each of the four category fields. After you have made your selections Select **Save** on the action bar to save changes.
- **Name 1 - 7:** You can enter up to names or topic descriptions. In the Name 1 field, enter the topic description. Repeat as needed in fields two through seven. After you have made your entries, select **Save** on the action bar to save changes.
- **Classification Codes:** If applicable, add classification codes, e.g., ICD-9, ICD-10, LOINC, SNOMED and/or ROI, to the document.
  - To add a code, select **Add Code** from the action bar. Multiple code fields are displayed. Enter the code in the applicable field (LOINC codes must be entered manually) or select the binoculars icon next to the field to search for a code by code number or description. When searching for codes, the codes are listed alphabetically by description. The list may also be sorted by the column headers. Highlight the desired code, then click the **Select** button. TIP: You can also double-click the code to select it. You are returned to the Classifications Codes screen and the code is displayed in the appropriate field. Select **Save** in the action bar to save changes.
  - To remove a classification code, select it from the grid, then select **Remove Code** from the action bar.

Classification Codes

- **Edit Document:** Select **English** or **Spanish** to determine the version of the document to be created.
  - To create the custom document, select the radio button in the **Edited** column for the document type then **Edit** on the action bar. the new blank document is displayed in Microsoft Word. Enter the text for the document then save and exit from Word. Select **Yes** to save the custom document or **No** to abort.



Save Changes?

- To delete a document, select **English** or **Spanish** to determine the version of the document to be deleted. Select the radio button in the **Edited** column for the document type, then **Delete** on the action bar. Select **Yes** to delete or **No** to abort.



Delete Document?

Additional options available via the action bar:

- **Show Shared:** This option will display setup being shared by multiple facilities.
- **Print:** Select this option to print setup.
- **Back Arrow:** Select this option to return to the previous screen.

### **Update User Defined Documents**

Select **Web Client > Tables > Clinical > Patient Education Maintenance > Update User Defined Documents** to view a list topics for which one or more original documents have been edited. It is recommended that edited documents be reviewed and compared against original documents at each quarterly update. See Document Maintenance for document selection options and maintenance.

## Rebuild Indexes

The Rebuild Indexes option is available for use at any time patient education documents are suspected of being lost or corrupted. This option is commonly used whenever Micromedex quarterly updates are loaded to the system. It may also be used to manually refresh selection lists after a new category or document has been created. Select **Web Client > Tables > Clinical > Patient Education Maintenance > Rebuild Indexes**.

## Setup Cover Page

A facility-defined cover page may be created to generate with Patient Education Documents when they are printed. To access the cover page for setup, go to **Web Client > Tables > Clinical > Setup Cover Page** to launch Microsoft Word. Enter the text for the cover page document, then save and exit from Word. Select **Yes** to save the cover page or **No** to abort. **NOTE:** In TruBridge EHR, when a document is printed from Clinical Knowledge, the hospital's cover sheet (if setup) will also print. This is the same cover sheet that the Patient Education Documents application utilizes.



Save Changes

The following TruBridge EHR AR database codes may be used on the cover sheet to automatically generate data:

- PATNAME: Patient's name
- PATNUM: Patient's account number
- PATSEX: Patient's sex
- PATAGE: Patient's age
- PATADMIT: Patient's admission date
- PATDISCHARGE: Patient's discharge date
- PATMRNUM: Patient's medical record number
- PATTYPE: Patient's stay type
- PATROOM: Patient's room number
- PATBDAY: Patient's date of birth
- PHYS1NUM: Admitting physician's number (system number)
- PHYS1NAME: Admitting physician's name
- PHYS1ABR: Admitting physician's abbreviated name
- PHYS2NUM: Secondary physician's number (system number)
- PHYS2NAME: Secondary physician's name
- PHYS2ABR: Secondary physician's abbreviated name
- DEPTNAME: Name of department the document is printed from
- PRINTDATE: Date document printed
- PRINTINIT: Initials of person printing document