



# EHR Go Guide: Creating New Patients or Activities

## Introduction

Faculty users have the ability to create new patients or activities in EHR Go.

**Patients** are healthcare scenarios presented in the form of a realistic and interactive electronic health record (EHR) for the healthcare encounter. Step One of patient-based content contains concept-based teaching/learning resources related to the patient case in Step Two. Patients can be used as the basis for any type of concept-based learning, skills practice, or clinical simulation. Teaching Tips are available under **Help/Resources** as examples of how to use patients in classroom, lab, and clinical applications.

**Activities** are structured assignments for the EHR. EHR Go provides four types of activities: Orientation (foundational concepts and informatics), Knowledge (case study), Skills (documentation practice), and Application (clinical simulation) activities. Activities include an assignment, student instructions, learning objectives, and faculty answer key or teaching materials in Step One.

Patients and activities that you or your colleagues add to EHR Go stay private for users within your program. No other Go users will have access to those patients or activities. EHR Go will also publish new content by request – please see the FAQs under the Help tab on [neehrperfect.com](http://neehrperfect.com) for more information. Content added by EHR Go are published for all Go users to access.

After creating a new patient or activity, faculty users within your program will also have access to it and may assign it to their students. If you'd like a colleague to assist you with creating or editing a patient or activity, he or she can be added as a Co-Author. You may also edit or create new versions of existing patients or activities, including those pre-loaded by EHR Go. It may be preferable to adapt an existing patient or activity to meet your learning objectives rather than building new. For more information about editing or creating new versions of existing activities, please see *EHR Go Guide: Editing Patients or Activities*.

## Additional resources



View the corresponding video found under **Help|Videos**, *Creating New Patients or Activities*. If you'd like to modify and/or create new versions of existing patient activities, please refer to the separate guide and video on *Editing Patients or Activities*.

## FAQs about creating patients or activities

1. **How do I find patients or activities that I created?**
  - a. When on the Create tab, you will see the items you've authored, co-authored, and your program's custom content, which will include any patients or activities authored by you or your colleagues.
  - b. When on the Library tab, you can also view the items you've authored or co-authored by selecting **Items I've Authored** and/or **Items I've Co-Authored** under the Quick category in the Filter & Sort box to the left.
2. **Can I delete a patient or activity?**
  - a. Yes, you may delete a patient or activity that you authored. Designated co-authors may not delete an activity but can make edits.
3. **Can I edit an existing patient or activity?**
  - a. Yes, you may directly edit a patient or activity that you authored or were listed as a co-author. You may also duplicate any existing patient or activity in order to make your own edits, including those pre-loaded by EHR Go. Please see separate *EHR Go Guide: Editing Patients or Activities* for more information.

## Important concepts

### Patient vs Activity

**Patients** are healthcare scenarios presented in the form of a realistic and interactive electronic health record (EHR) for the healthcare encounter. Step One of patient-based content contains concept-based teaching/learning resources related to the patient case in Step Two. Patients can be used as the basis for any type of concept-based learning, skills practice, or clinical simulation. Teaching Tips are available under **Help/Resources** as examples of how to use patients in classroom, lab, and clinical applications.



**Activities** are structured assignments for the EHR. EHR Go provides four types of activities: Orientation (foundational concepts and informatics), Knowledge (case study), Skills (documentation practice), and Application (clinical simulation) activities. Activities include an assignment, student instructions, learning objectives, and faculty answer key or teaching materials in Step One.

### Time

Charts (EHRs) in EHR Go! are displayed in *relative time* so they are always current. Relative time is generated based on a time offset of the last chart entry, known as the key event. For example, the chart may always appear as though it were 15 minutes after the last progress note was entered and the timing of the other chart entries is adjusted accordingly.

Charts are created and edited in *static time* using actual timestamps. Generally, charts are built with arbitrary dates in the recent past. When building a new chart, select a date for the patient admission or clinic visit and enter the date of the additional chart entries accordingly. These dates will then be automatically converted to relative time when students view the chart.

EHR Go recommends using relative time, but there is also an option to keep the chart in static time, where the dates of the chart entries stay fixed. More information about this is described further in the guide.

### Views

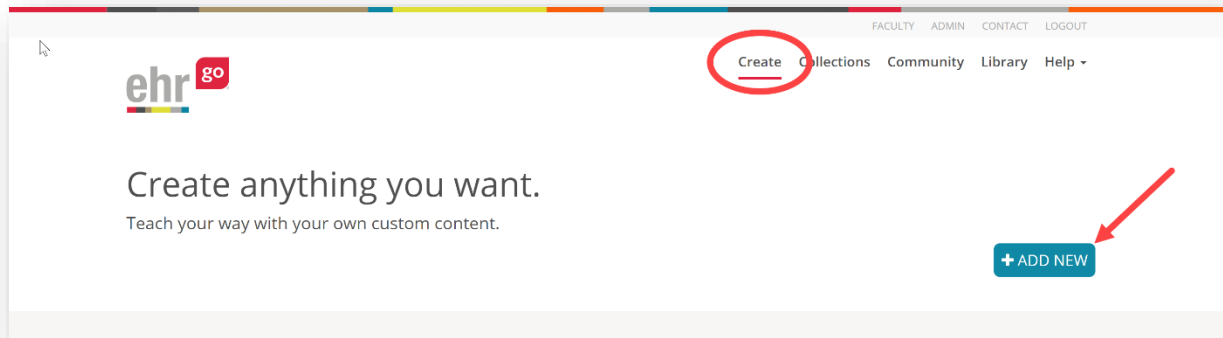
There are three views available when viewing a patient or activity in EHR Go: Edit, Faculty, and Student. Use the Edit View to create new patients or activities and make edits to existing patients or activities. Use the Faculty View to assign the patient or activity to students – you’ll find a link to post in your learning management system under Step 3. Use the Student View to view the activity as your students will see it.

When in the Faculty or Student Views, the EHR will be displayed in relative time. When in the Edit View, the EHR will be in static time.

## Starting a new patient or activity



From the **Create** tab, select **+ Add New**.



You'll be brought to the Step 1: Overview & Resources section and will automatically be in Edit View. This is the first step in the simple three-part authoring process.

## Three-step authoring process

### Step 1: Overview & Resources

**If you are creating a new patient**, you can enter the patient's name and sex. You can also enter a Short Description of the patient for your students. You may wish to provide some background about the patient and/or instructions for the students. Hint: View some existing EHR Go patients for sample descriptions.

**If you are creating a new activity**, you can enter the name and sex of the patient whose EHR your students will access as part of the activity. You will also want to provide an activity title by checking the **Add Activity Title** box and entering an activity title below (e.g. Registering a Patient 1) – this will be the title of the activity for your students. Ensure your Activity Title is unique. If an activity already exists with the same name, you may wish to incorporate an identifier such as your course number. You can also enter a Short Description of the activity for your students.

Next, upload an image of your patient by selecting **+ Add New Photo**. An image file (.jpg,



.png, .gif) may be selected as long as it is 60KB or smaller. If the file size is larger than 60KB, it must be reduced and programs such as Microsoft Paint® may be used to reduce the file size.

Click the **Save Changes** button.

A screenshot of the 'Edit' view for a patient named Charles Blue. The interface has a red header with navigation tabs: 'Views: Faculty Student Edit', '1 Overview & Resources', '2 Edit EHR', and '3 Invite'. Below the header, the patient's name 'Charles Blue' is displayed with an '(EDIT VIEW)' link. To the right are 'DUPLICATE' and 'DELETE' buttons. The main form area includes a 'Patient Name' section with input fields for 'Charles', 'Middle Name', 'Blue', 'Suffix', and 'Male'. Below this is a 'Short Description' section with a rich text editor toolbar (bold, italic, underline, link, unlink, list, indent, outdent, text color, background color, font size, font family) and a text area containing the placeholder text 'This is where you provide an overview of your patient/activity for your students.' To the right of the text area is a photo of a smiling man. At the bottom left is a 'SAVE CHANGES' button, and at the bottom right is a '+ ADD NEW PHOTO' button.

Next, upload any materials you would like included with your patient or activity by clicking on the **+Add New Material** button. If you are creating a new activity, you will want to include the activity document here for students. For patients or activities, you can include any supporting documents that you'd like included with the patient chart. These materials may include references, clinical practice guidelines, supplemental scenario information, and more.

Note: If the chart includes scheduled medication orders, then a digital barcode sheet is automatically generated by the system and will automatically appear here. There is no need to add the barcode sheet.

Next, you will be prompted to Select File, enter a category, and add a description (optional).



**Select File:** Locate any saved file to upload. These files may include documents from Microsoft Word (.doc), Excel (.xls), Adobe (PDF), or image files (.jpg, .png, or .gif).

**Category:** Select a category. Most often, the “Resource” category should be used for resources and other supplemental information. When creating a new activity, the student activity document should be tagged as an “Activity”. Students do not receive files with the category “Activity Answer Key”. Use that category for anything you’d like only your colleagues to see.

**Description:** [Optional] Enter a brief description about the file and/or what students should do with it.

The screenshot shows a dialog box titled "Add New Material" with a close button (X) in the top right corner. Inside the dialog, there is a blue "Select file" button. Below it is a "Category" label followed by a dropdown menu. Underneath the dropdown is a "Description" label followed by a large text input area. At the bottom right of the dialog are two buttons: "Cancel" and "Save".

Select **Save**. Continue to add materials by clicking **+Add New Material** until you are done.

If desired, populate the Patient/Activity Tags. More than one tag may be added and additional tag options will appear by clicking in the field. Remove existing tags by clicking the **X** in front of the tag. If you don’t see a tag option that meets your needs, the field may be left blank.



**Type of Activity (only applicable when creating a new activity):** Please see the *Instructor Guide* for a complete description of the different activity types in EHR Go or leave blank.

**Body System:** Indicate the body system(s) that are the focus of the patient or activity. Often multiple tags are used in this field.

**Patient Age:** Indicate the age range of the patient.

**Discipline:** Indicate the type of program(s) that may find this patient or activity applicable. Keep in mind, only users within your program will see this chart.

**Type of Visit:** Indicate if the patient is currently being seen for an inpatient or an outpatient visit.

A screenshot of the "Patient Tags" form in EHR Go. The form has a light grey background and a white border. It contains five sections, each with a title and a text input field: "Body System" (with a placeholder "Select body system ..."), "Patient Age" (with a placeholder "Select patient age ..."), "Discipline" (with a placeholder "Select discipline ..."), and "Type of Visit" (with a placeholder "Select type of visit ..."). Above the first section is a prompt: "Start typing to see what tags are available."

## Step 2: Edit EHR

This section is where the patient's chart (EHR) is created. Select **Edit Patient Chart** to begin building the patient chart for the patient or activity.



Views: Faculty Student Edit

1 Overview & Resources 2 **Edit EHR** 3 Invite

Patient: **Charles Blue** (EDIT VIEW)

Click the "Edit Patient Chart" below to edit the patient's chart.

Charles Blue EDIT PATIENT CHART

When a new session of a chart is started, the Go! EHR automatically sets your case to relative time with the most recent event occurring 15 minutes ago. This relative time feature allows the chart to stay current for a realistic simulation. If you would like the relative timing of the chart to be more or less than 15 minutes, click Advanced Options below.

Advanced Options

By default, the Registration section will be displayed. Select **Edit** in the bottom right corner.

Patient: Charles Blue DOB: Invalid date M MR#: Search

Admit Date:

Discovery Health Pharmacy Account **Registration** Encounters Insurance Scheduling Claims Ledger Reports

### Registration Details

Patient Information

Suffix:		
First Name: Charles	Last Name: Blue	Middle Name or Initial:
Alias or Non-Legal Name:	Sex: Male	Date of Birth:
Medical Record Number:	SSN:	Marital Status:
Current Gender Identity:	Patient Race/Ethnicity:	Language:
Street Address:	Apmt #:	
City:	State/Province:	
ZIP/Postal Code:	Email:	Home Phone:
Cell Phone:	Employment Status:	Employer:
Work Phone:	Occupation:	

EDIT

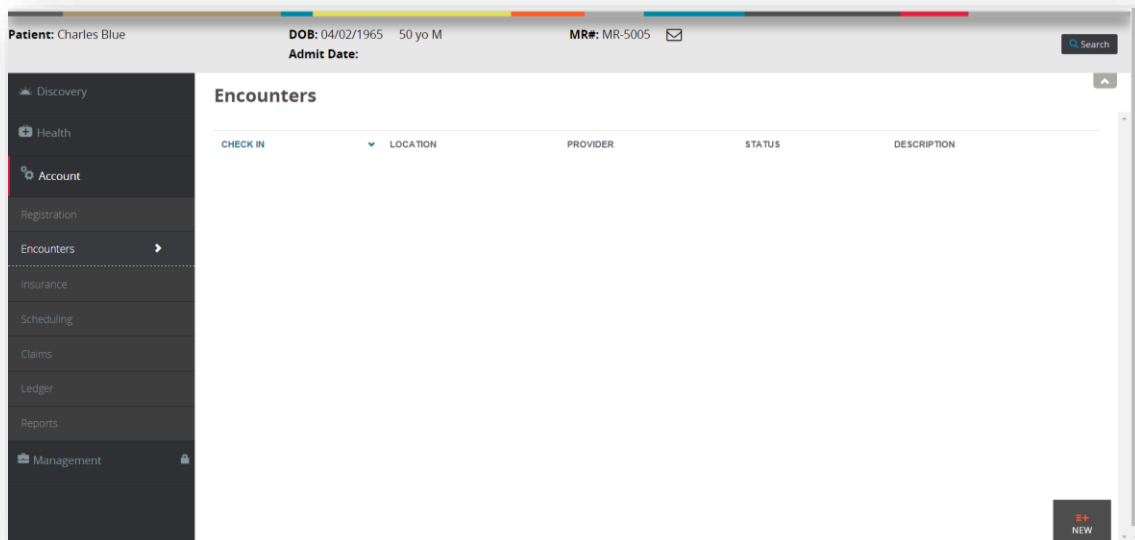
The patient's name that you originally entered in the network under Step 1: Overview & Resources will auto-populate here. If you change the patient's name inside the EHR, it will also update on the network. Populate any other applicable fields. Please review the *EHR Go Guide: Registration in the EHR* for more information about the registration fields.

Select **Upload photo** and attach the same patient image here as you did in the Activity Info section. Then select **Save** in the bottom, right corner to complete the patient registration.





Next, select the **Encounters** tab then **New**.



Populate the following encounter fields. When selecting a date, choose an arbitrary date and time in the recent past. Keep in mind, the chart will be converted to relative time when viewed in the Faculty and Student View. The date entered below in static time is only relevant in regards to the other chart content you're adding now in the Edit View. The other chart entries need to have dates relative to the encounter date entered below.

The chart will automatically be converted to relative time in the Faculty and Student View. Relative time is generated based on a time offset of the last chart entry, known as the key event. For example, the chart may always appear as though it were 15 minutes after the last progress note was entered and the chart entry timestamps are adjusted accordingly. This offset can be adjusted and will be discussed later in this guide.

**Date:** Enter an arbitrary date the patient is being admitted or seen in the clinic. Generally, this is a date in the recent past. For example, this date may be yesterday at 8am.



**Author:** Select “Current User” if you’d like your name to be listed on the chart as the author or select one of the generic providers listed.

**Status:** Select “Admitted” if the patient is an inpatient. Select “Checked in” if the patient is being seen in an outpatient clinic.

**Status Notes:** [Optional] Add notes about the patient status (i.e. “Stable”)

**Facility Type:** Select Inpatient, Outpatient, or Long-Term Care.

**Service Location:** Select a pre-loaded location where the patient is being seen.

**Check In/Admit Date:** Enter the same date used above in the Date field.

**Check Out/Discharge Date:** This field is only visible if the Status is set to Checked out or Discharged and is generally not applicable for this step.

**Provider:** Select a Provider from the dropdown list. This may be the same as the Author selected above.

**Description:** [Optional] Enter a description about the encounter.

Select **Save** in the bottom, right corner when finished.



Patient: Charles Blue      DOB: 04/02/1965   50 yo M      MR#: MR-5005  

Admit Date:

**Encounter Edit**

Date:	12/31/2015 08:00	
Author:	Padma Amit, MD	
Status: *	Admitted	
Status Notes:	Stable	
Facility Type: *	Inpatient	
Service Location: *	General Hospital ER	
Check In/Admit Date: *	12/31/2015 08:00	
Provider: *	Padma Amit, MD	
Description:		

**Notes**

Date	Author *	Comment *	Attachment
01/01/2016 19:05	Current User	Comment here	

If the patient has insurance, select the **Insurance** tab and enter the information. Please see *EHR Go Guide: Insurance* for more details. If applicable, populate the additional tabs in the Account section and view corresponding guides as needed.

Move on to the **Health** section of the chart. The Overview tab will provide a summary of what information has been entered thus far.



**Patient:** Charles Blue  
General Hospital ER

**DOB:** 04/02/1965 50 yo M  
**Admit Date:** 12/31/2015 08:00

**MR#:** MR-5005

**Health**

**Overview**

**Patient Info**

NAME	CONTACT INFORMATION	PATIENT LANGUAGE	PATIENT RACE/ ETHNICITY
Blue, Charles	405-555-9900 (Home)		

**Encounters**

DATE	LOCATION	PROVIDER	STATUS	DESCRIPTION
12/31/2015 08:00	General Hospital ER	Padma Amil, MD	Admitted Stable	

**Alerts**

DATE & TIME	SUBJECT	STATUS	ALERT TYPE

**Problems**

PRIORITY	STATUS	DESCRIPTION	IMMEDIACY	DATE OF ONSET	PROVIDER

**Orders**

PRIORITY	STATUS	DESCRIPTION	IMMEDIACY	DATE OF ONSET	PROVIDER

Go through the various tabs in the Health Section to add chart content. **As content is added, ensure the date fields correspond to the date you selected in the Encounter.** For example, if the patient was admitted yesterday at 8:00am, the additional chart entries should be entered relative to that date. Refer to additional guides on the various tabs and their associated fields found under **Help | Guides**.

**Alerts:** Add an adverse reaction/allergy or indicate No Known Allergy (NKA), advanced directive, crisis note, or clinical warning.

**Problems:** Add problems, procedures, and diagnosis. These problems can be related to the current encounter or entered for historical purposes. Even if a problem has been treated, resolved, or has become inactive, it may still be listed as part of the patient's history.

**Vitals:** Add vital sets. Depending on the patient scenario, you may wish to add a set of admission vitals and additional vital entries that occur throughout the patient visit.



**Orders:** Add orders including patient care, procedures, consults, therapy, scheduling, location, medications, diet, laboratory, and more. Refer to the *EHR Go Guide: Orders* for more information.

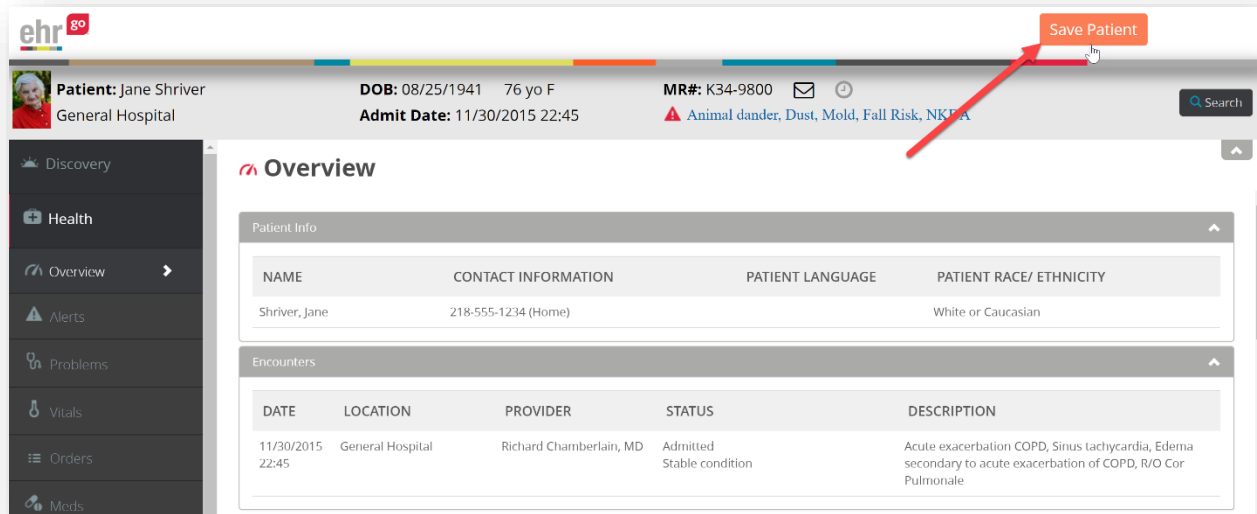
**Meds:** This tab is where medications are administered. Medication orders added on the Orders tab will automatically appear here. Medication administration history may also be incorporated into the orders if past administrations are important to the scenario. See separate *EHR Go Guide: Adding Medication History* for more information.

**Notes:** Add documentation notes about the patient's condition and history. There are many types of notes in the EHR including: admission notes, assessments, SOAP notes, exams, reports, screening tools, progress notes, evaluations, and more. The free text note allows you to document without a pre-loaded template and enter your preferred title. Images may also be included with notes.

**Care Plan:** Add a care plan, if applicable.

**Labs:** Enter lab results. Use the Other Lab Tests section at the end if your lab result field isn't displayed.

After all the chart entries are complete, select **Save Patient** in the upper, right corner of the screen. If this is not done, your work will not be saved!

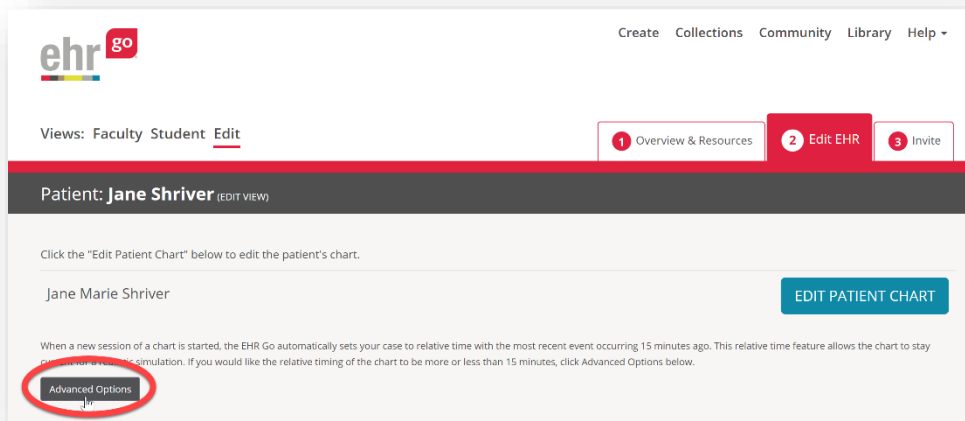


It may take a few moments for the chart to close and return to the patient or activity listing. Return to **Step 2: Edit EHR** to view and adjust the relative timing of the chart.

When a new session of a chart is started, the Go EHR automatically sets the chart to relative time so the chart stays current for a realistic simulation. This is achieved by applying a time offset to the most recent event in the chart, known as the Key Event. By default, this offset is 15 minutes, meaning the most recent event will always have occurred 15 minutes ago with the rest of the chart entries adjusted accordingly.

Selecting the Faculty or Student View allows you to view the chart under Step 2 in relative time as it will be seen by students.

If you would like to adjust the relative timing of the chart, select **Advanced Options** under **Step 2: Edit EHR** in the Edit View.



The Key Event (the most recent event in the chart) will be displayed. The offset is based off this event. In the example below, the chart will always appear as if the most recent lab result (Key Event) was entered 15 minutes ago. If you would like another chart entry to be the key event, return to **Edit Patient Chart** and adjust the preferred chart entry so that it has the most recent timestamp.

The screenshot shows the 'Edit EHR' interface for a patient named Neveah Williams. At the top, there are tabs for 'Views: Faculty Student Edit' and a progress bar with three steps: '1 Overview & Resources', '2 Edit EHR' (which is active), and '3 Invite'. Below the patient name, there is an 'EDIT PATIENT CHART' button. The main content area includes an 'Advanced Options' section with a 'KEY EVENT' (Nursing Progress Note Note - 12/01/2015 01:30 AM) and a 'TIME CONTROLS' section. The 'TIME CONTROLS' section has a 'How long ago?' field set to '15' and a 'Time Mode' section with a 'Disable relative time?' checkbox. A red oval highlights the 'TIME CONTROLS' section, and an 'Apply Advanced Options' button is at the bottom.

Adjust the Key Event Offset (How long ago? Field) if you would like the offset to be more or less than 15 minutes. Then select **Apply Advanced Options**.

Relative time may be disabled if you would like the chart to always appear in static time for your students. Static time would maintain the exact dates and times used when the chart was created (as seen in the Author Perspective). These dates would stay fixed over time so the patient may appear to have been admitted months ago, or longer, depending on when the chart is viewed. Select the **Disable relative time?** box to convert the chart to static time.

### Step 3: Invite

If you would like colleagues within your program to have the ability to *edit* your original activity or patient, they must be designated as a co-author. Colleagues may view and assign any patient or activity without being a co-author. They may also duplicate and create their own version of your patient or activity without being a co-author, in which case your original version will not be altered.

Select **Step 3: Invite**





Views: Faculty Student Edit

1 Overview & Resources 2 Edit EHR 3 Invite

Patient: **Charles Blue** (EDIT VIEW)

Invite faculty from your program to edit your chart.

Faculty	Permission
Perfect, Neehra <neehra@neehrperfect.com>	Author

Select co-author to invite ...

Your colleagues with EHR Go accounts will appear in the “Select co-author to invite” dropdown list. Select a co-author(s) and the designated co-author(s) will receive an email letting them know they can edit the activity or patient. To do so, he or she will select the patient or activity from the Library and then choose the Edit View.

## Assigning the patient or activity to students

To locate the assignment link to provide to your students, switch from the Edit View to the Faculty View. Then select **Step 3: Assign**. Copy the link provided and post it in your learning management system (LMS) or preferred location for assigning work to your students.

Views: Faculty Student

1 Overview & Resources 2 Review EHR 3 Assign

Activity: **RT Interpreting ABGs** DUPLICATE

Assign RT Interpreting ABGs to Students

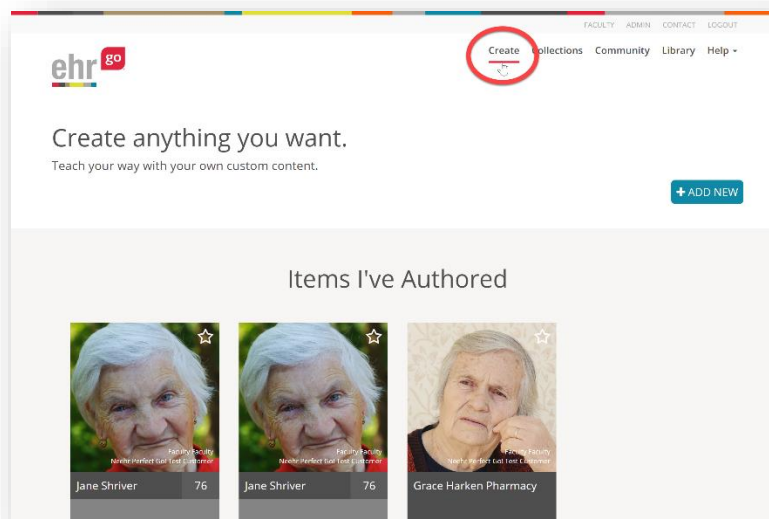
Copy and paste this link into your Course Management System, Learning Management System (LMS) or simply paste into an email. When students click on the link, they're brought right to the patient chart.

<https://web21.ehrgo.com/rd/?courseActivityId=59>



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Filter and sort ^

Clear All

☒ Recently Viewed  
☐ Newest  
☐ A to Z  
☐ Z to A


Filter by patient  
Select patient ...

Quick  
☐ Only Show My Favorites  
☐ Include Items I've Archived  
☒ Items I've Authored  
☒ Items I've Co-Authored  
☒ Customized Items  
☐ Neehr Perfect Items

Looking for something specific?

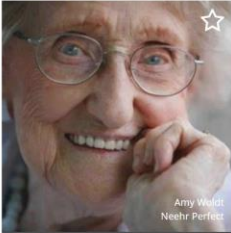
Search

Currently viewing: Customized Items Items I've Authored Items I've Co-Authored




Charles Blue52

OPENACTIONS



Meridith Dewietz Pharm101

OPENACTIONS



Registering a Patient 1

OPENACTIONS