EHR Go Guide: Editing Patients or Activities

Introduction

As a faculty user, you may directly edit any patient or activity that you authored or have been added as a co-author to by a colleague within your program. If you are not the original author or a co-author of a patient or activity, you may duplicate the patient or activity and make edits. Essentially any patient or activity, including those pre-loaded by EHR Go, may be edited using one of these methods. Edited versions of patient and activities stay private for users within your program and are not visible to other EHR Go users.

In addition to editing the chart itself, the supporting materials provided with the patient or activity may be modified. These materials may include a student activity document, references, clinical practice guidelines, scenario information, or anything that you feel would be useful for the student. Remove or add material provided with existing patients or activities, if desired.

When editing the existing version of a patient or activity (as an author or co-author), the link to assign the chart to the students stays the same. Students will automatically see the updates when accessing the activity even if it has already been assigned. It's important to check with your colleagues who may be using the activity before making edits. To be safe, you may prefer to duplicate the patient or activity in order to create your own new version, in which case there is a new link to assign the patient or activity to students and the original version and link are preserved for those already using it.

Additional resources

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

FAQs about editing charts

1. **Can I delete a patient or activity?**
    a. Only the original author may delete a patient or activity. Co-authors may not delete a patient or activity but can make edits.

2. **Do I need to post a new link to assign the patient or activity to my students after making edits?**
    a. If you are the original author or a designated co-author of a patient or activity, you may edit the original version, in which case the assignment link stays the same. If you duplicated the patient or activity to create your own new version, then there is a new link to assign to your students. This link is found under **Step 3: Assign** of the Faculty View.

3. **How do I find my version of the patient or activity?**
    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 or edited by you or your colleagues.
    b. When on the Library tab, you can also view the items you've edited/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.

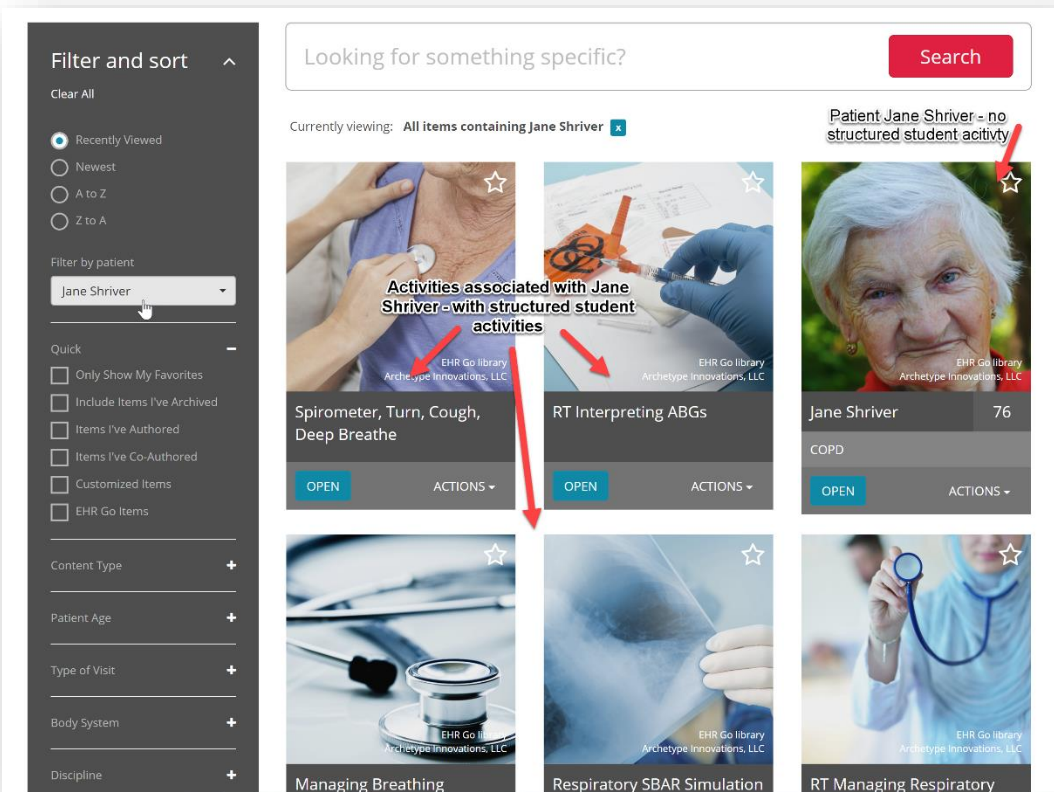
Important concepts

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.

In the screen shot below, Jane Shriver was selected from the "Filter by patient" option in the Filter and sort area of the Library tab. Here you will find the patient Jane Shriver, which includes no structured student activity. You will also see any activities associated with Jane Shriver's EHR, which will include a structured student assignment. You can choose to further filter by "Content Type" in the Filter and sort area to view only the patient or only the activities, if desired.



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 dates in the past. **It's important to maintain the original time profile when adding new chart entries.** For example, if you'd like to add a new order to an existing chart, refer to the timestamp of the other orders in the chart so that new entries are consistent.

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.

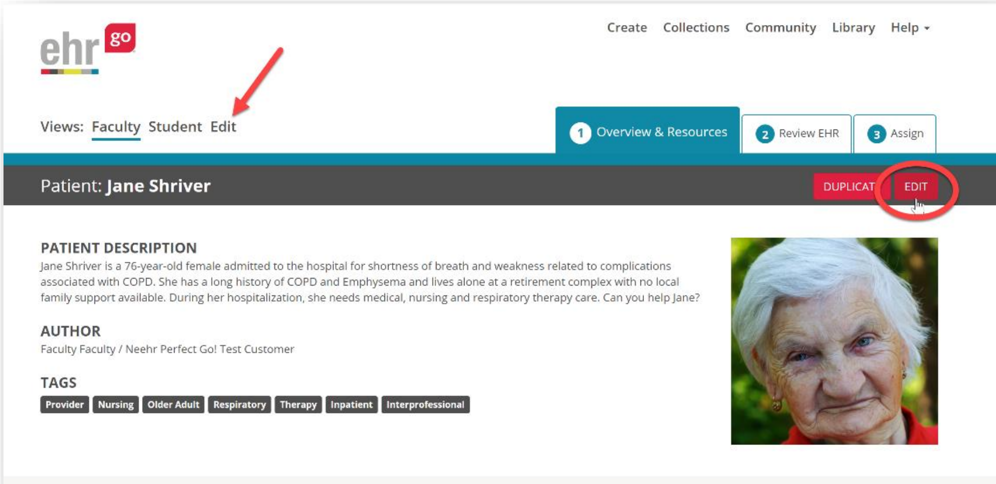
Views

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.

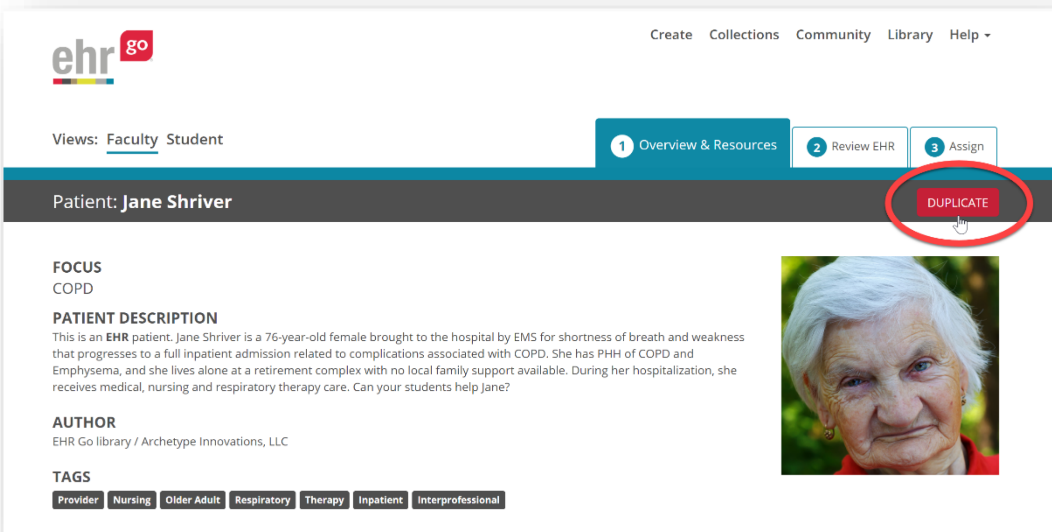
When in the Faculty or Student Views, the EHR will be displayed in relative time. When in the Edit View, the EHR will be in static time.

Editing vs creating a new patient or activity

If you are the author or a designated co-author of the patient or activity, then you may edit the original version. After selecting a patient activity you'd like to edit, select the Edit View in the left corner or select the Edit button to the right to make changes – both options will bring you to the Edit View where you can edit the patient or activity.



If you are not the original author or a designated co-author of a patient or activity, you must select **Duplicate** to proceed (the original version cannot be edited).



Even if you have the ability to edit the patient or activity, it may be preferable to duplicate in order to create a new version and maintain the original version for those already using it.

Duplicating is also useful for building unfolding scenarios or new scenes built upon the previous version. After **Duplicate** has been selected, the Edit View is now active, which enables edits.

Edit View

Whether you are editing the original patient or activity or duplicating, you'll be brought to the Edit View to make changes. Any changes made in the Faculty View or Student View will not propagate out to other users. Only the Edit View allows changes that will be seen by other users in your program.

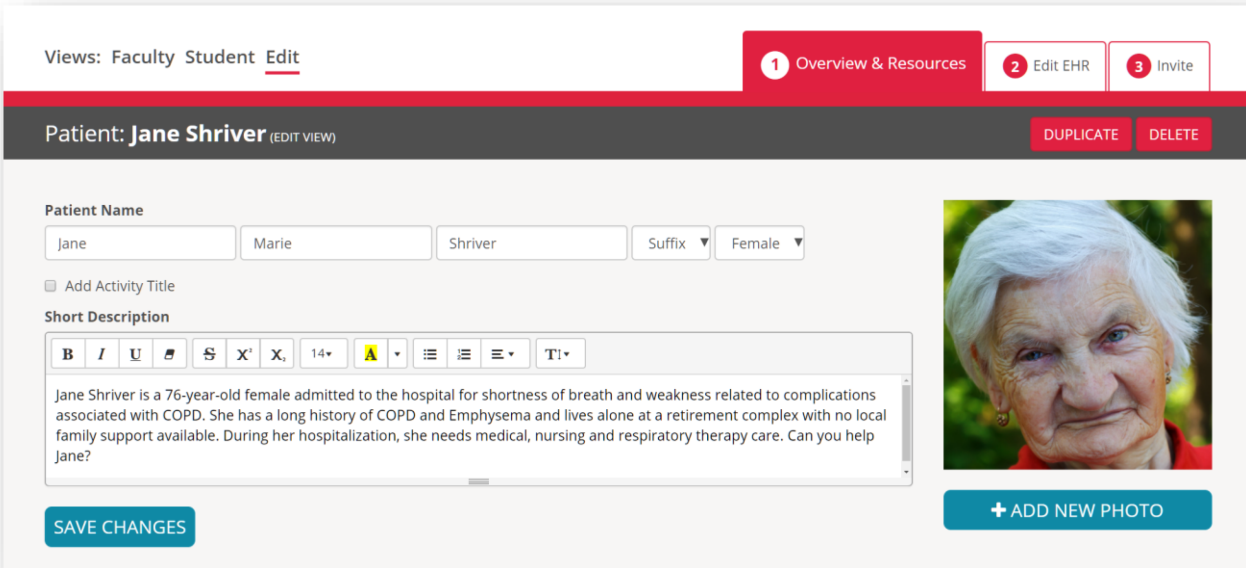
Three-step edit process

Step 1: Overview & Resources

The author's original patient/activity name and description entries will be displayed under Step 1: Overview & Resources. Modify the name/title, description and picture, if desired.

If you are editing a patient, you can change the patient's name and sex, if desired, or leave as is. You can also edit/enter the 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 editing an activity, you can change the name and sex of the patient whose EHR your students will access as part of the activity. You can also edit the Activity Title. 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 edit/enter a Short Description of the activity for your students.



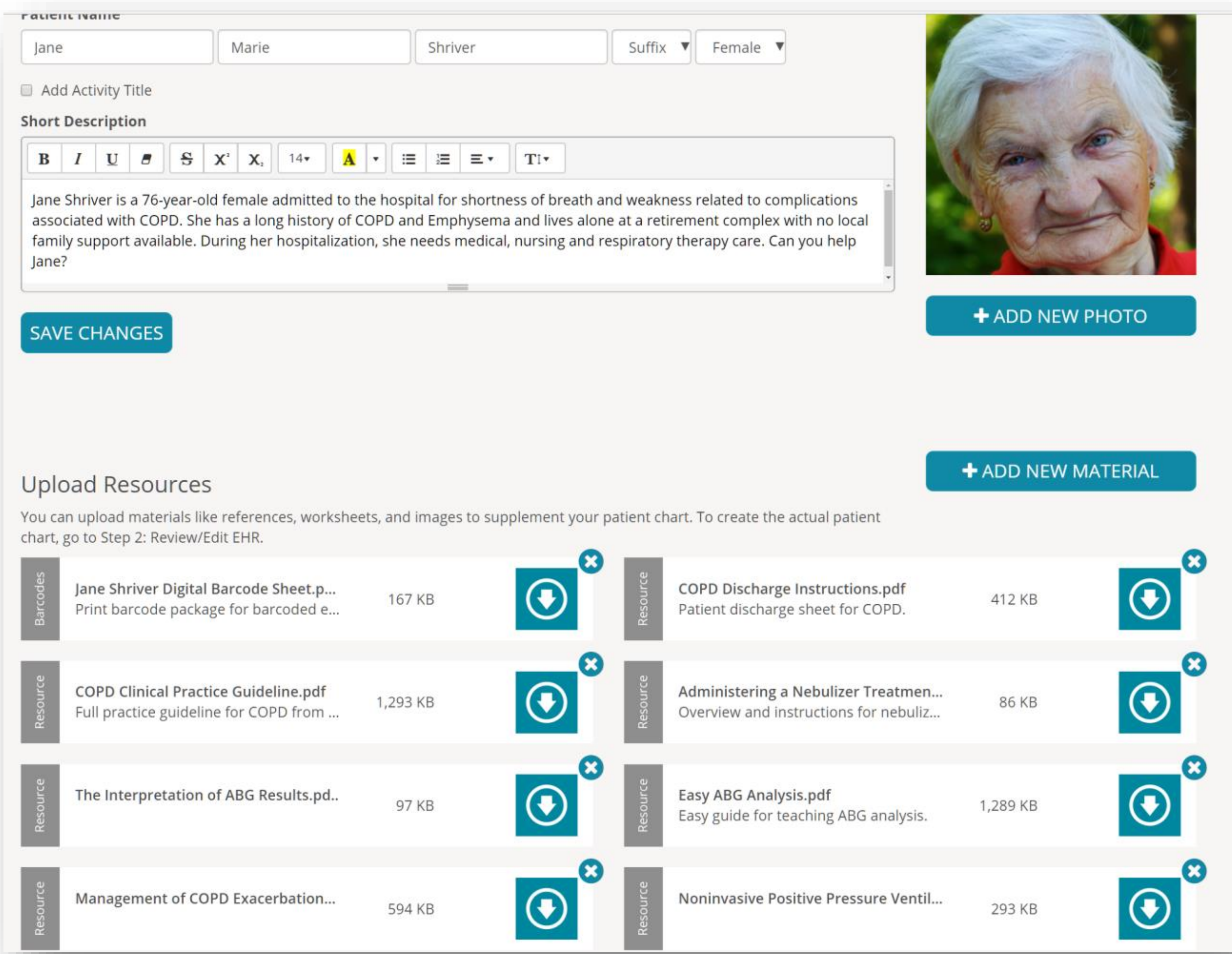
If desired, you can change/upload an image for your patient or activity by selecting **+Add New Photo.** An image file (.jpg, .png, .gif) may be selected as long as it is 60KB or smaller. If the file size is larger than 60KB, it must be reduced and programs such as Microsoft Paint® may be used to reduce the file size.

Click the **Save Changes** button.

Next you can edit the supporting documents that are included with the patient or activity. These materials may include references, supplemental information, student activities, and more.

Remove a document by clicking the **X** icon to the right of the listing. Then select **OK** at the confirmation message.

Note: If the chart includes scheduled medication orders, then a digital barcode sheet is automatically generated by the system and will automatically appear as a resource. There is no need to modify the barcode sheet, but you can remove it if desired.



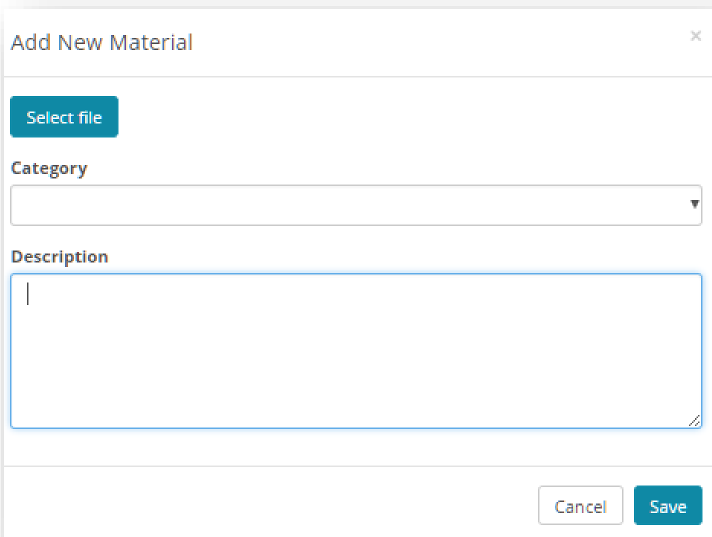
Add an additional document by selecting the **+Add New Material** button.

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.

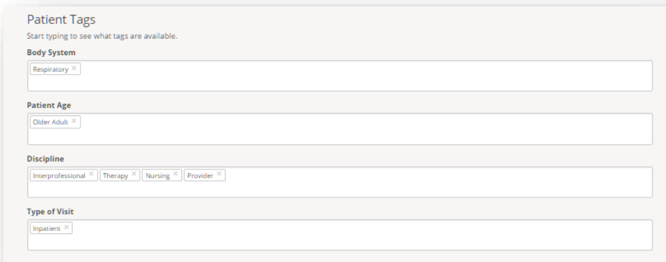


Select **Save** to return and continue adding materials, if desired.

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

The remaining fields include preloaded 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** to the left of the tag. If you don't see a tag option that meets your needs, the field may be left blank.

Patient Tags example:



Activity Tags example:

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.

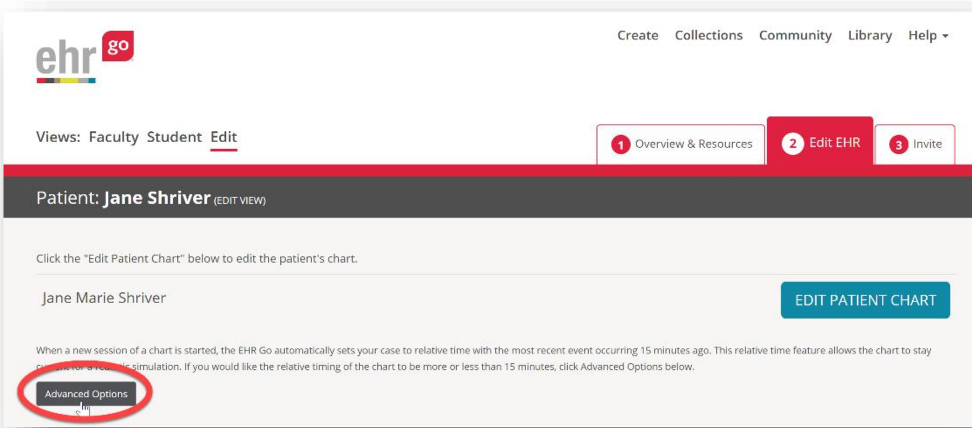
Type of Visit: Indicate if the patient is currently being seen for an inpatient or an outpatient visit.

Step 2: Edit EHR

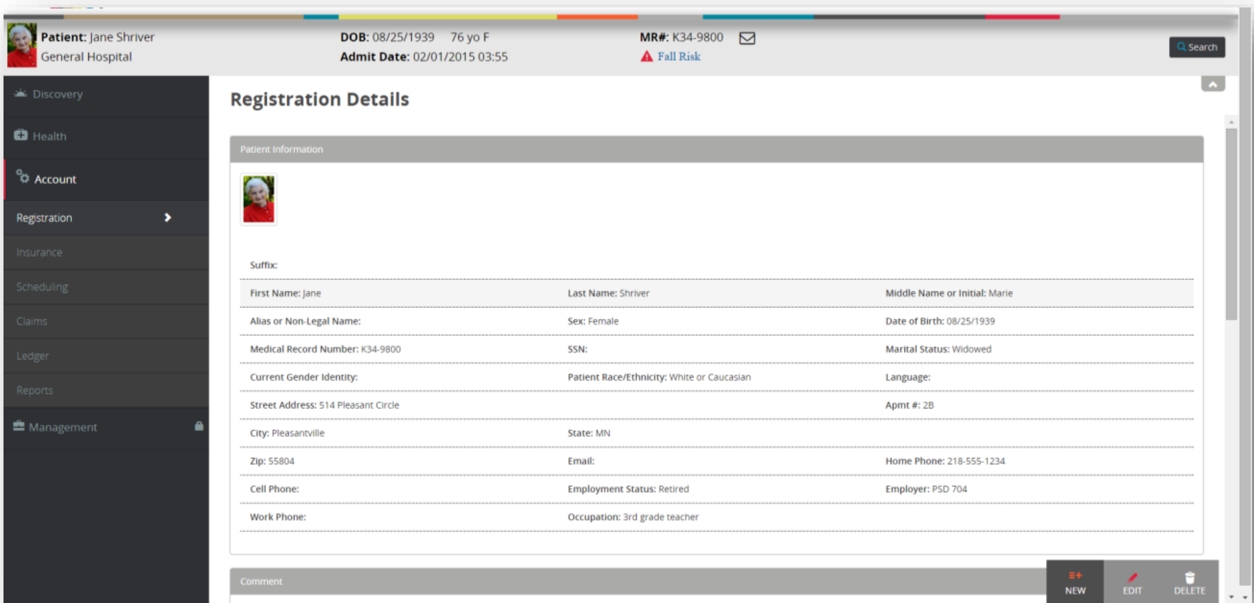
This section is where the patient's chart (EHR) may be edited. Charts are edited in static time, meaning actual timestamps are assigned to chart entries. When the chart is viewed in the Faculty View or Student View, the chart is converted to relative time so it always appears up-to-date. Relative time 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.

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

Under the Edit View, select **Advanced Options** to change the time offset or to disable relative time. See *Key Event Offset* section later in this guide.



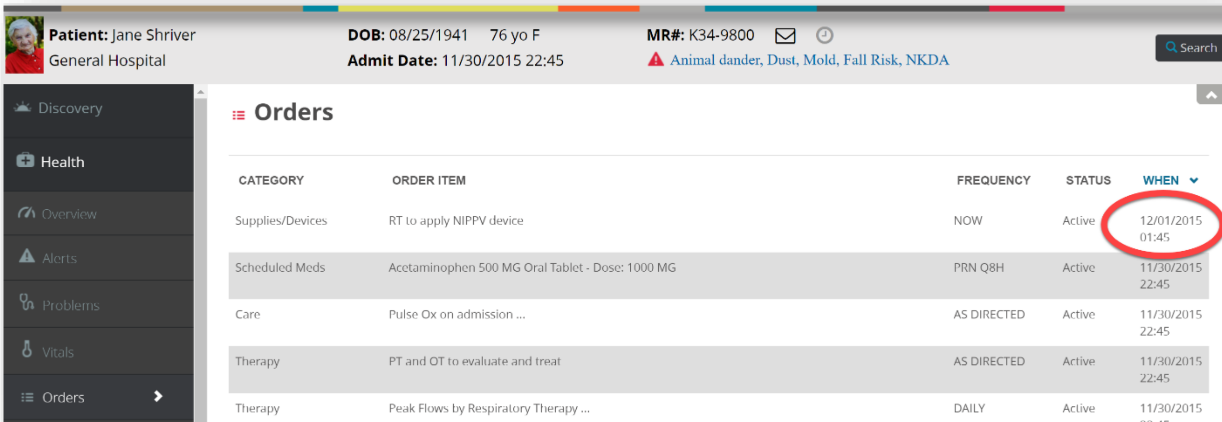
Select **Edit Patient Chart** to make changes to the chart. By default, the Registration section will be displayed.



Note: If you changed the patient's name or photo in the activity or patient listing in the network, the new name will be auto-populated here. Select **Edit** in the bottom, right corner to make any updates.

Go through the various tabs and modify the chart content, as desired. Please see additional guides on each section of the EHR for more details about adding new chart content and the various fields associated with each section. These guides are found under **Help|Guides**.

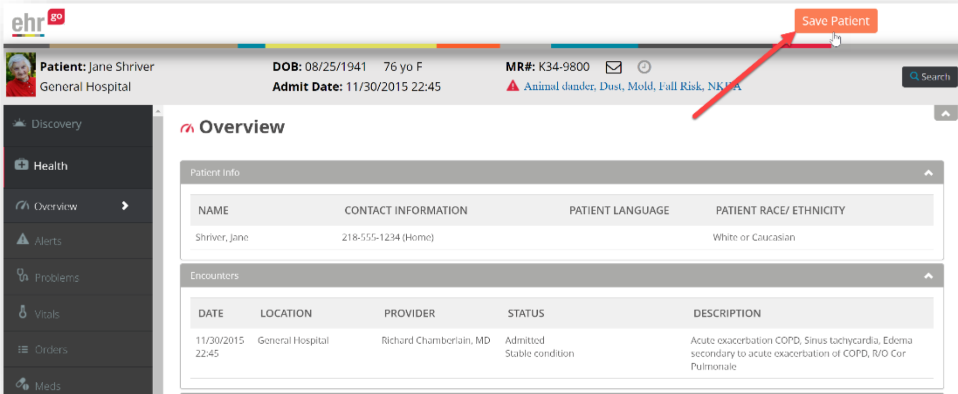
<u>Observe the timestamps associated with the existing chart entries</u>. These timestamps will be in the past. New content should be entered based on the existing times. For example, in this chart the existing orders have a start date and time of 12/01/2015 01:45.



For consistency, you may also want to note the Provider, Author, and Ends on date in addition to the Date and Starts on. Click on an existing order to view this information.

New orders and other chart entries should be added relative to the existing timestamps. If a new order is added and should be part of the same initial order set, then the date should be adjusted to be 12/01/2015 01:45 as well in this example. In most cases, the Date field will be the same as the Starts on field, and the Author field will be the same as the Provider field.

After all of the chart edits are complete, select **Save Patient** in the upper, right corner of the screen**.** If this is not done, your work will not be saved! (Hint: If you see Close Session instead of Save Patient then you are not in the Edit View and you need to re-enter the edits in the Edit View.



It may take a few moments for the chart to close and return to the patient or activity in the network. At this point, the edits will be visible to you and your colleagues.

Key Event Offset

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.

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

The Key Event (the most recent event in the chart) will be displayed. The offset is based off this event. For example, the chart will always appear as if the most recent progress note 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.

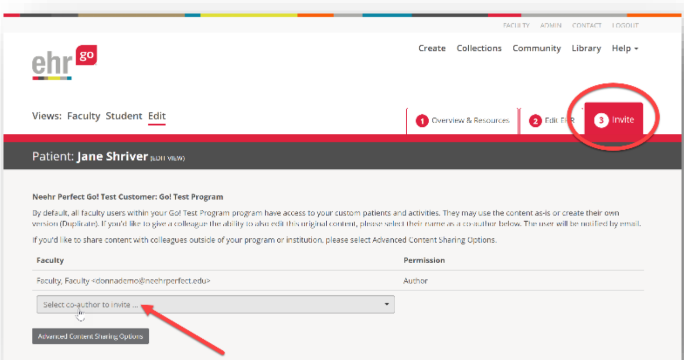
Adjust the Key Event Offset if you would like the offset to be more or less than 15 minutes. Then select **Apply Advanced Options.** If desired, you may select the Faculty or Student View to see the chart in relative time.

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 Edit View). 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 version of the patient or activity, they must be designated as a co-author. Colleagues may view and assign any chart without being a co-author.

Select **Step 3: Invite**



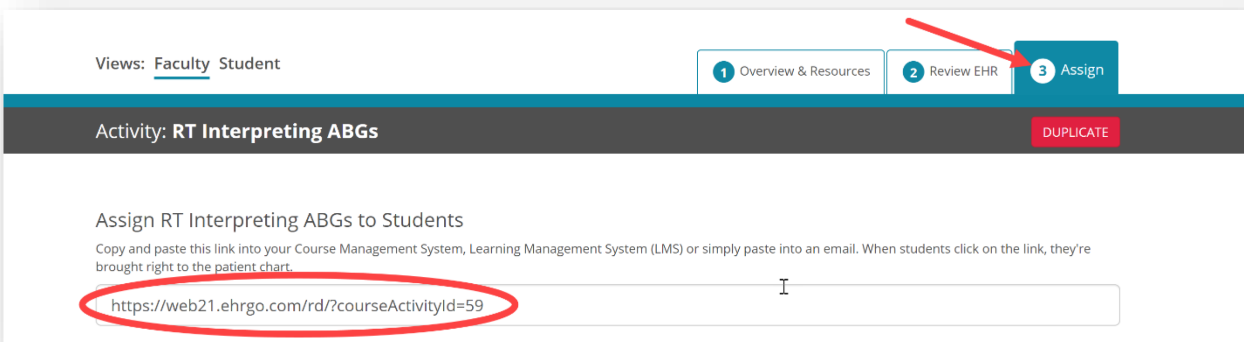
Your colleagues with EHR Go accounts will appear in the “Select co-author to invite” dropdown list. Select a co-author(s) and the designated co-author(s) will receive an email letting them know they can edit the activity or patient. To do so, he or she will select the patient or activity from the Library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

Assigning the chart or activity to students

When editing the existing version of a patient or activity (as an author or co-author), the link to assign the patient or activity to the students stays the same. Students will automatically see the updates when accessing the activity even if it has already been assigned.

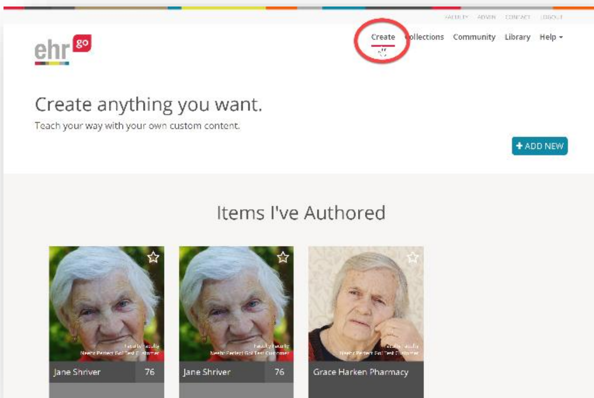
If you have duplicated a patient or activity to create a new version, there will be a new assignment link to provide to your students.

To locate the assignment link to provide to your students, click on the activity or patient and select 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.



Locating your program's custom patients and activities

When on the **Create** tab, you will see the items you've authored/edited, co-authored, and your program's custom content, which will include any patients or activities authored by you or your colleagues.



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. Selecting Customized Items will display those items created or edited by colleagues within your program.