



EHR Go Guide: Group Work for Faculty

Introduction

The group work feature in EHR Go allows multiple students to work collaboratively in the same EHR session and see each other's documentation. The group work feature also allows faculty to join the group and add new documentation "on-the-fly" as students are interacting with the chart. Group work can be done with students in the same program or with students in other programs for a full IPE experience.

Setting up Group Work

The group work feature is available for any program using EHR Go. Faculty can enable group work for any patient, whether the patient is from the EHR Go library or a custom patient you created.

Group work is enabled by creating a group work link(s) for the patient which will then be provided to students. To create a group work link(s) for a patient:

1. Select and open the patient in EHR Go so you see the 1-2-3 above the patient's photo.
2. Click the 3: Assign tab, and then click the **Activate Advanced Assign** button below. This area will allow you to create group work link(s) to provide to your students. You will also have the option of selecting a Start and End date and time for any links you create, if desired.



Views: Faculty Student

1 Overview & Resources 2 Review EHR 3 Assign

Patient: **Maria Ramirez** DUPLICATE

Assign Maria Ramirez 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.

Activate Advanced Assign

Add Custom Link

Title*

Start Date

End Date

Link Type*

SAVE

A B C

Hide Advanced Assign

- a. Title: this is the title of the link that will be provided to your students. Using a descriptive title will help faculty stay organized when creating multiple links. Best practices for custom link titles are to include the patient's name along with a group name and a date (e.g. Maria Ramirez Group One 11.21.2018)
- b. Start Date and End Date: If desired, you can add a start date/time and end date/time to control students' access to the chart. If students are provided with the link and click it before the set start date/time, they will be denied access to the chart. Once the end



date/time has passed, the patient will no longer appear in the students' library and the link will no longer work. Setting a start and end time for links is optional

- c. Link Type: Here, select either Individual or Group option. An Individual link would allow students to only see their own instance of the chart, and they would be unable to collaborate with their classmates. A Group link would allow all students provided with the link to collaborate with each other in the same chart at the same time. your needs.

3. Click **Save** when finished.

A screenshot of the "Add Custom Link" form. It contains four input fields: "Title*" with the value "Maria Gomez Group 1 - 11/28/2018", "Start Date" with "11/28/2018 01:00 PM", "End Date" with "11/28/2018 06:00 PM", and "Link Type*" with a dropdown menu set to "Group". A blue "SAVE" button is located at the bottom right, with a red arrow pointing to it.

4. The link title you just created will now show as a custom link. Click the **Show Link** button to expose the link.

A screenshot of the "Assign Maria Ramirez to Students via Custom Links" section. It includes a table with columns for Title, Start Date, End Date, and Link Type. The table contains one row with the title "Maria Gomez Group 1 - 11/28/2018", start date "11/28/2018 01:00 PM", end date "11/28/2018 06:00 PM", and a "SHOW LINK" button. A red arrow points to the "SHOW LINK" button.

5. Copy the link and paste it in your learning management system for students. You can also provide it via email or another preferred method.



Assign Maria Ramirez to Students via Custom Links

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

| Title | Start Date | End Date | Link Type |
|--|---------------------|---------------------|---|
|  Maria Gomez Group 1 - 11/28/2018 | 11/28/2018 01:00 PM | 11/28/2018 06:00 PM |   |

https://web21.ehrgo.com/customlink/u/100205/p/522589/n/maria_gomez_group_1_11_28_2018

If you will have multiple groups of students accessing the patient's chart, you can create additional custom links. To do so, add another custom link following the same steps outlined above.

These custom links can be edited by clicking on the blue pencil icon to the left of the Title. This allows you to:

- Change the title of the custom link
- Add or change the start and end dates/times for the custom link
- Change the link type to individual or group
- Delete the custom link

Assign Maria Ramirez to Students via Custom Links

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

| Title | Start Date | End Date | Link Type |
|--|---------------------|---------------------|---|
|  Maria Gomez Group 1 - 11/28/2018 | 11/28/2018 01:00 PM | 11/28/2018 06:00 PM |   |
|  Maria Gomez Group 2 - 11/28/2018 | | |   |
|  Maria Gomez Group 3 - 11/28/2018 | | |   |

Add Custom Link

Title* Start Date End Date Link Type*



Note: If a custom link that was already provided to students is deleted, students will no longer have access to the patient. Deleted custom links can be restored, by clicking on **Show Previously Deleted Links** and choosing **Restore**. If a custom link that was already provided to students is deleted and then restored, the patient will then become available in the students' library again (provided the date/time falls within any set start and end date parameters for the link).

Joining a Group Work Session as Faculty

The faculty who creates the custom group link(s) for students will be able to see each group session(s) and join them under the 2: Review EHR tab for the patient. **If other faculty will be involved in the group session, they must also be provided with the links in order to join the group.**

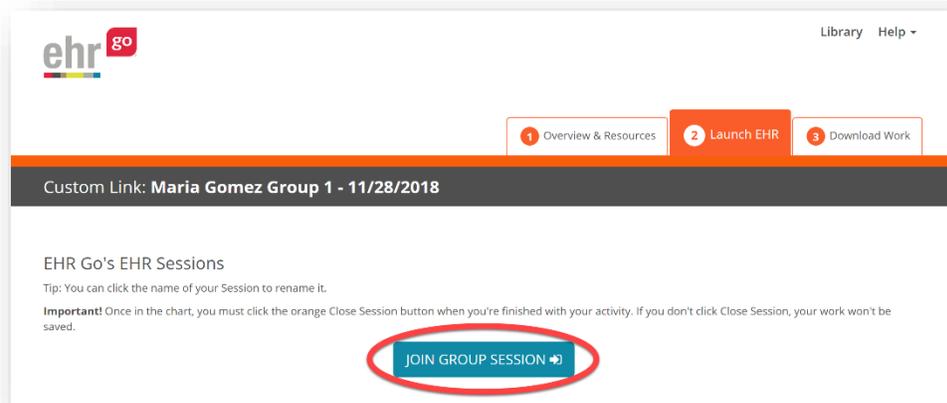
If you generated the custom link(s), click on **2: Review EHR** for the patient. You will see the group session(s) you created below and can click the **Join** button next to the session to join the group and be brought into the patient's chart.

A screenshot of an EHR interface. At the top, there are tabs for 'Views: Faculty Student' and three numbered tabs: '1 Overview & Resources', '2 Review EHR', and '3 Assign'. Below this is a patient header for 'Maria Ramirez' with a 'DUPLICATE' button. The main section is titled 'Custom Links' and contains a table with three rows. Each row has columns for 'Title', 'Start Date', 'End Date', and 'Link Type'. The first row is 'Maria Gomez Group 1 - 11/28/2018' with start date '11/28/2018 01:00 PM' and end date '11/28/2018 06:00 PM'. The 'Link Type' column for this row shows a group icon and a blue 'JOIN' button with a right-pointing arrow, which is circled in red. The other two rows have similar titles and dates but no end dates or link types shown.

If you did not generate the custom link(s), you will need to receive the link from the colleague who did in order to join the group. Once you click the link and sign in using your username and



password when prompted, you will now be able to join the session by clicking on **2: Launch EHR** and then clicking the **Join Group Session** button.



Once inside the chart, faculty can edit, add or remove data from the patient's EHR as students are working in the chart, allowing faculty to incorporate on-the-fly additions as the scenario unfolds. See the *Collaborating in a Group Work Session* section below for more details.

Timing in a Group Work Session

Charts in EHR Go are converted to “relative time”, so the chart always appears up-to-date. The default timing is for the key event, or most recent chart entry, to have happened 15 minutes prior to the beginning of the session. **In a group work session, the first user - faculty or student -to join the group session locks in the timing of the chart data.** As an example, if the first user joins a session at 10am on December 1, the most recent chart entry will be dated for 9:45am on December 1 with the rest of the chart entries adjusted accordingly. That timing will remain consistent for all other users in the group, no matter when they access the group session.

To ensure the timing of the chart will be current for the session, either hold off on providing the link to other users until it is time for the session to begin or set a Start Date and Time for the link so it cannot be accessed prior to the set date/time.



If students will be reviewing the patient prior to a simulation, creating a separate “pre-planning” link is recommended. Using the standard link found under 3: Assign (click the **Hide Advanced Assign** button under 3: Assign in order to find the standard link) can be used for this, or a custom pre-planning link with a specific start and end time can be created so access to the pre-planning link can be controlled.

Collaborating in a Group Work Session

Inside the EHR of a group work session, both students and faculty can add new data and edit existing data within the chart. All members of the group, students and faculty, will see each other’s documentation as it is recorded in the chart. This feature allows faculty to add “on-the-fly” data to the chart as the scenario unfolds, if desired. Any data entries will update in real time for all users. If a user joins the session later, they will see all documentation completed in the session prior to them joining the session.

Note: The Accounts section of the chart (registration, insurance, claims, ledger) **Do Not** have group functionality with this initial release.

As seen in the example below, a change has been made to the Orders section of the EHR, as indicated by the **1** icon next to the Orders tab along the left side of the chart.



Patient: Maria Ramirez DOB: 06/21/1972 46 yo F MR#: 657643211 Admit Date: NKA

Overview

Patient Info

| NAME | CONTACT INFORMATION | PATIENT LANGUAGE | PATIENT RACE/ ETHNICITY |
|----------------|--|------------------|-------------------------|
| Ramirez, Maria | 714-525-9162 (Emergency Contact) 714-255-1826 (Mobile) | English/Spanish | Hispanic |

Encounters

| DATE | LOCATION | PROVIDER | STATUS | DESCRIPTION |
|------------------|----------------|-----------------------|--|---|
| 11/21/2018 13:13 | Central Clinic | Corina Saucedo, MD | Checked Out C & S pending | Cystitis |
| 10/15/2018 13:58 | Central Clinic | Martina Perez, PharmD | Checked Out Follow-up with provider in three months or sooner PRN | DM monitoring visit with Pharmacy |
| 08/24/2018 13:47 | Central Clinic | Erin Glaser, PharmD | Checked Out Follow-up with labs in one month | Pharmacy Clinic visit for change in insulin |
| 07/18/2018 14:18 | Central Clinic | Corina Saucedo, MD | Checked Out New patient visit | Follow-up with Pharmacy Clinic in one month |

Once the corresponding tab (Orders in this case) is clicked, the user will be prompted to refresh to process changes made to that section of the chart. Once the Refresh button is clicked, any new items entered will now appear and will be flagged as new, as shown below.

Patient: Maria Ramirez DOB: 06/21/1972 46 yo F MR#: 657643211 Admit Date: NKA

Orders

Warning: New orders are available. Click Refresh to process changes.

Refresh

| CATEGORY | ORDER ITEM | FREQUENCY | STATUS | WHEN |
|---------------|---|--------------|----------|------------------|
| Prescriptions | Rutinex DS 800 MG / 160 MG Oral Tablet - Dose: 1 Tablet | RD | Complete | 11/21/2018 13:58 |
| Laboratory | Urine dipstick | NOW | Complete | 11/21/2018 13:48 |
| Diagnostics | Diabetic Consult | AS DIRECTED | Active | 11/21/2018 13:48 |
| Laboratory | Culture & Sensitivity | AS DIRECTED | Complete | 11/21/2018 13:28 |
| Laboratory | CMP | AS DIRECTED | Complete | 08/31/2018 18:02 |
| Scheduling | Follow-up Pharmacy Consult | ONCF | Complete | 08/24/2018 13:52 |
| Prescriptions | Hydrochlorothiazide 12.5 MG Oral Capsule - Dose: 12.5mg daily | DAILY (0800) | Active | 07/18/2018 14:46 |



Orders

| CATEGORY | ORDER ITEM | FREQUENCY | STATUS | WHEN |
|------------------------|---|-------------|----------|------------------|
| NEW Diagnostics | X-ray of chest | ONCE | Complete | 11/28/2018 13:03 |
| Prescriptions | Bactrim DS 800 MG / 160 MG Oral Tablet - Dose: 1 Tablet | BID | Complete | 11/21/2018 13:48 |
| Laboratory | Urine dipstick | NOW | Complete | 11/21/2018 13:48 |
| Dietetics | Dietetic Consult | AS DIRECTED | Active | 11/21/2018 13:48 |
| Laboratory | Culture & Sensitivity | AS DIRECTED | Complete | 11/21/2018 13:28 |

Clicking on the new item will process it and remove the New flag. If a new item has been processed and then updated, users will be notified of that as well. See screenshot below.

Orders

| CATEGORY | ORDER ITEM | FREQUENCY | STATUS | WHEN |
|----------------------------|---|-------------|----------|------------------|
| UPDATED Diagnostics | X-ray of chest | ONCE | Pending | 11/28/2018 13:03 |
| Prescriptions | Bactrim DS 800 MG / 160 MG Oral Tablet - Dose: 1 tablet | BID | Complete | 11/21/2018 13:48 |
| Laboratory | Urine dipstick | NOW | Complete | 11/21/2018 13:48 |
| Dietetics | Dietetic Consult | AS DIRECTED | Active | 11/21/2018 13:48 |
| Laboratory | Culture & Sensitivity | AS DIRECTED | Complete | 11/21/2018 13:28 |
| Laboratory | CMP | AS DIRECTED | Complete | 08/31/2018 18:02 |

Clicking on the updated item will process the item and remove the flag.

Please note that while users may document on the same tab within the EHR at the same time (e.g. two students can be entering or editing separate orders under the Orders tab at the same time), users will not be able to edit the exact same item at the same time (e.g. two students cannot select the same order and both edit that exact same order at the same time). Instead, the user who opens the item first will be able to edit, and any other user who tries to edit that



item at the same time will receive a “Locked for editing” message until the first user’s edits are complete.

☰ **Order Details (Locked for editing)** 🔒

This feature prevents multiple individuals from editing the same item at the same time.

Student Work

Students can download a PDF Progress Report of their work for a group work session, following the same steps as they would for an individual session: saving their work, clicking the Close Session button in the top right corner of the chart, and downloading their progress report under 3: Download. The student progress report will only reflect **that individual student’s** documentation during the session. Documentation by other students in the session will not appear on the progress report.