

Using UpToDate Engagement Manager with UpToDate Journeys



Enrollment



Enrolling a patient in UpToDate® Journeys

Schedule Program

Patient Information

Last Name:

First Name:

Gender:

Date of Birth: / / MM/DD/YYYY

☐ Treat Patient as a minor

Email:

Phone: () - (recommended)

☒ I have permission to text this number.

Programs

Program

Provider:

Program

Type in keyword(s) or program name:

Show:

- COPD JOURNEY (DIGITAL)
- COPD JOURNEY (DIGITAL) CONFIGURABLE QUESTIONS TEST
- COPD JOURNEY (IVR AND DIGITAL) SWITCH
- PNEUMONIA JOURNEY (DIGITAL)
- PNEUMONIA JOURNEY (IVR)
- TEST COPD CHRONIC CHECK-IN 1

Location:

View-by Date: / / MM/DD/YYYY

Question Mode:

1. Review the UpToDate Journeys enrollment flier with the patient.
2. Enter the patients phone number and email address in the patient information section of "Schedule UpToDate Engagement Manager".
3. Schedule the series appropriate for the patient's condition. All topics are designated by a digital hierarchy or phone icon.
4. If the series you're looking for does not first appear in the list, use the keyword search.
5. Schedule additional UpToDate Journeys topics for the patient if he/she has any other chronic conditions, such as asthma, diabetes, or hypertension.



Enrolling Circle of Care members in UpToDate Journeys

Available for the following series: AMI, Behavioral Health, COPD, Heart Failure 30 Day, Heart Failure 45 Day, Pneumonia and Stroke

Circle of Care Information (optional)

Member 1:
Last Name:
First Name:
Email:
Phone: () - -
Relationship to Patient:

Member 2:
Last Name:
First Name:
Email:
Phone: () - -
Relationship to Patient:

Member 3:
Last Name:
First Name:
Email:
Phone: () - -
Relationship to Patient:

Member 4:
Last Name:
First Name:
Email:
Phone: () - -
Relationship to Patient:

1. Follow the steps listed above to enroll a patient.
2. Once you select "Finish Scheduling," a Circle of Care page will appear.
3. Fill out the Circle of Care contact information (a phone number is required).
4. Select "Sign Up Circle of Care."

Deactivation



Deactivating from UpToDate Journeys

TEST, TEST (COPD CHRONIC CARE JOURNEY (DIGITAL))
Gender: FEMALE
Access Code: 12132839502
DOB: Jan 1, 1980
Journey Start Date: Apr 11, 2024
View-by Date: May 16, 2024
Provider: DOE, DOCTOR
Program: COPD CHRONIC CARE JOURNEY (DIGITAL)
Location: DKNUIROWSKI TEST
Question Mode: TEAM DEFAULT
Email: TEST.TEST@WOLTERSKLUWER.COM
Phone: (555) 555-5555
Date Created: Apr 10, 2024
Scheduled By: (dknurowski)

Confirm Deactivate
Are you sure you want to deactivate the following program?
Name: TEST, TEST
Gender: FEMALE
Program: COPD CHRONIC CARE JOURNEY (DIGITAL)
Access Code: 12132839502
DOB: Jan 1, 1980
View-by Date: May 16, 2024
Provider: DOE, DOCTOR
Location: DKNUIROWSKI TEST
Email: TEST.TEST@WOLTERSKLUWER.COM
Phone: (555) 555-5555

1. On the "Patient List" tab, search for the patient's last name.
Only the top 1,000 results will be returned. Refine search if you don't see your patient.
2. Click on the patient's name next to the appropriate series.
3. Click "Deactivate UpToDate Engagement Manager."
4. The patient will be removed from UpToDate Journeys - no longer receiving notifications.



For more information please visit <https://www.wolterskluwer.com/en/solutions/uptodate/enterprise/patient-engagement> or contact us at <https://www.wolterskluwer.com/en/solutions/uptodate/contact>