

Using UpToDate Engagement Manager with UpToDate Journeys



Enrollment

Enrolling a patient in UpToDate® Journeys

Schedule Program

Patient Information

Last Name	TEST
First Name	TEST
Gender	FEMALE
Date of Birth	01 / 01 / 1980 MM/DD/YYYY
<input type="checkbox"/> Treat Patient as a minor	
Email	TEST.TEST@WOLTERSKLUWER.COM
Phone	(555) 555-5555 (recommended)
<input checked="" type="checkbox"/> I have permission to text this number.	

Programs

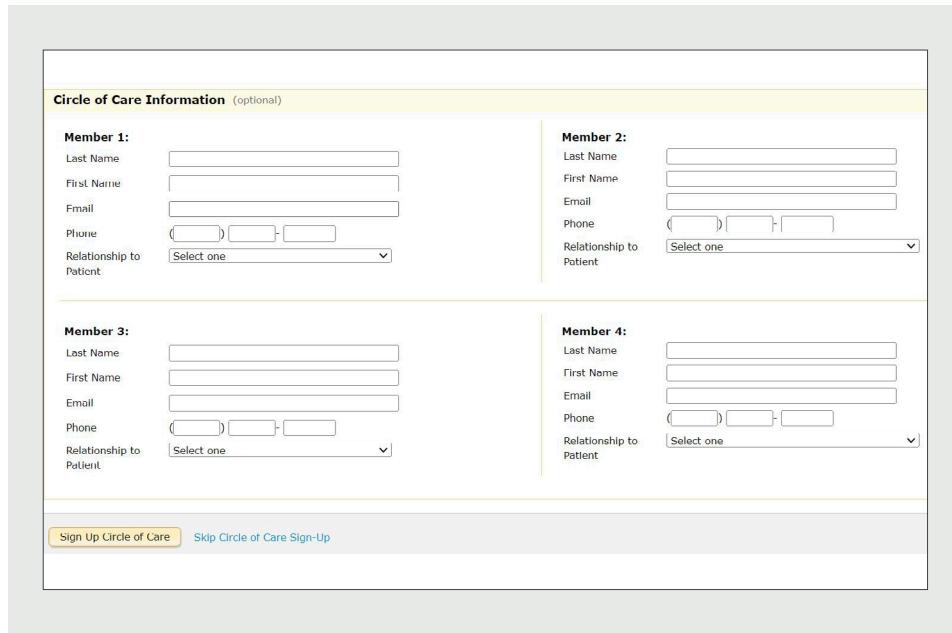
Program

Provider	UNSPECIFIED, DOCTOR
Program	Type in keyword(s) or program name: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>
Show: Pulmonary	
<ul style="list-style-type: none">COPD JOURNEY (DIGITAL)COPD JOURNEY (DIGITAL) CONFIGURABLE QUESTIONS TESTCOPD JOURNEY (IVR AND DIGITAL) SWITCHPNEUMONIA JOURNEY (DIGITAL)PNEUMONIA JOURNEY (IVR)TEST COPD CHRONIC CHECK-IN 1	
Location	Select Location
View-by Date	<input type="text"/> / <input type="text"/> / <input type="text"/> MM/DD/YYYY <input type="button" value="Calendar"/>
Question Mode	TEAM DEFAULT

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:

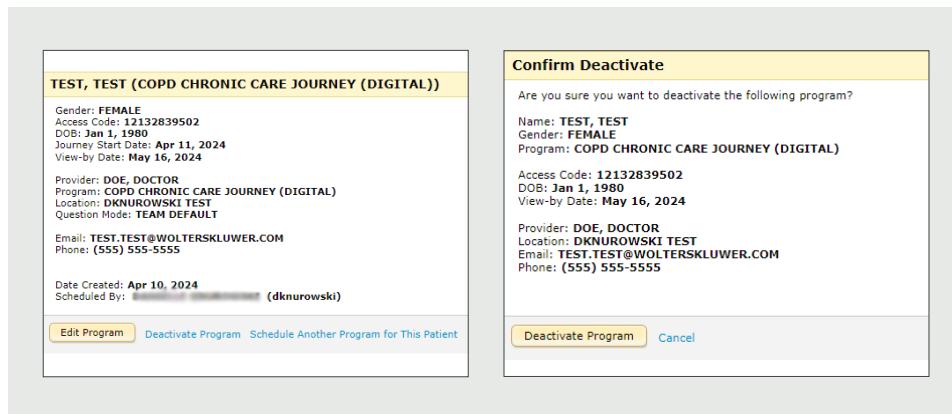
Member 3:
Last Name:
First Name:
Email:
Phone: --
Relationship to Patient:

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: DKNUROWSKI 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: DKNUROWSKI 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>