A Guide to UpToDate Journeys Real-Time Dashboard

Getting started

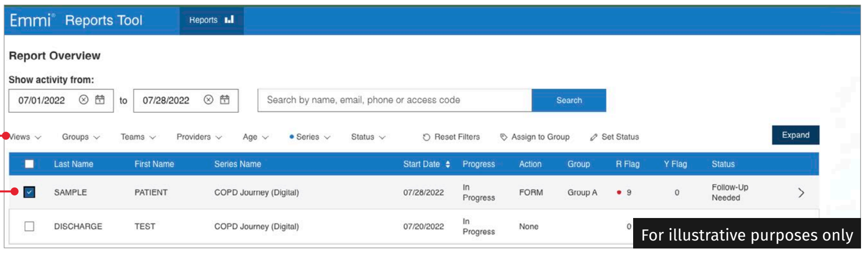
Accessing the UpToDate® Journeys Dashboard

- UpToDate® Patient Engagement will provide staff with access to UpToDate Engagement Manager. Staff users will only be able to see patients under teams they have access to.
- Use the link to Launch Reporting Tool from the upper right-hand corner in UpToDate Engagement Manager. The link will also be sent out to dashboard users.

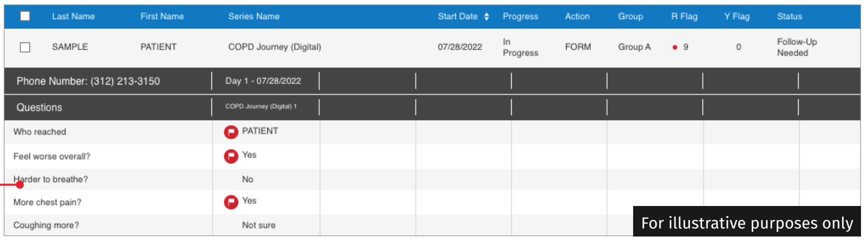
Using the Dashboard

The report defaults to a summary of all the ongoing patient responses. Patients with the most red flags populate to the top of the list, followed by patients with the most yellow flags, and then patients who haven't been flagged.

Staff can filter their view to display only the patient population they're managing.



One or multiple patients can be selected using the checkboxes at the start of each row to **Expand** the rows to see more information, **Assign to Groups**, or **Set Status**.



Expansion of each Patient Row shows any patient interactions from the last seven touchpoints. Patients' responses will appear with any red or yellow flags displayed next to the response.

Staff can also click the arrow at the end of the patient row for a complete view of all the available patient data, as well as the patient's interactions with assigned multimedia education programs, e.g. x program assigned/viewed/completed.

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Tips and Tricks for Managing Your Patients

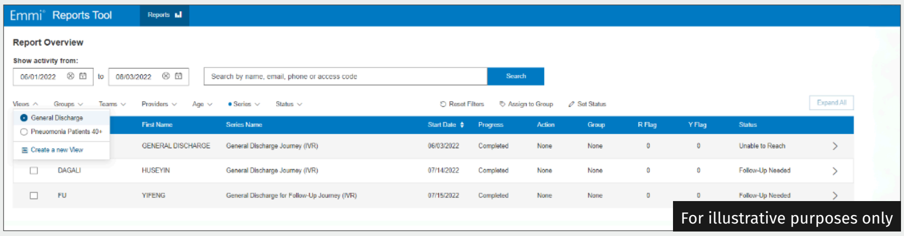
Adjusting the Report Date Range

The dashboard default view is today's date, but can be adjusted to view patient activity within 1-90 day increments from the last 6 months. However, the red flag counts will always be based on the end date in the date range.

Setting Report Filters

Users can customize their own report view(s) to limit the report to the patients they're responsible for managing.

Custom Views can also be leveraged to speed up the delegation of patient responsibilities – e.g., create a View for patients falling under the General Discharge Series, which Sarah oversees; create a View for patients 40+ falling under the Pneumonia Series, which Katie oversees, etc.



For illustrative purposes only

Custom views can be set using the various filter options, e.g. groups (see below for tips on using groups), teams, providers, patient ages, series, and status on communication with the patient.

Staff can create multiple custom views and edit/delete any of those views as needed.

Assigning Patients to Groups

Streamline the triaging process with the Grouping feature. Define which Group each Staff member oversees, filter on each Group's related Custom View, and then assign one or multiple patients to each Group – e.g., patients falling under the General Discharge Series go to Group B, which Sarah oversees; patients 40+ falling under the Pneumonia Series go to Group C, which Katie oversees, etc.

Using the checkboxes at the start of each row, select one or multiple patients to **Assign to Group**. Staff members can filter the Dashboard by **Group** to view the patients they're responsible for managing.

Using the Status Feature to Coordinate Patient Management

Delegate follow-up tasks by assigning a status to a Group of patients that a Staff member is managing. Filter the Dashboard by **Group** and use the checkboxes at the start of each row to **Set Status**.

Timestamped statuses allow staff to document and share patient follow-up with the rest of the team. Update a patient's status by using the checkboxes at the start of each row in the Patient Overview or by using the **Set Status** button in the Patient Breakdown.

Please reach out to your customer success specialist if you have additional questions.