From the Office of Health Informatics

Quick Reference Guide (QRG)
Document Patient Education

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This Quick Reference Guide (QRG) reviews the steps for documenting patient education.

Common Buttons & Icons

More Options...	**More Options** button
X	**X Close** Button
Remove	**Remove** button
Close	**Close** button
Favorites	**Favorites** button
Modify	**Modify** button
Print	**Print** button
☆	**Favorite** icon

Document Patient Education

➢ **From the Provider View Workflow page:**

STEP 1: Navigate to the **Patient Education** component.

NOTE: **It's important that This Visit diagnoses are associated prior to providing patient education as this component pulls in suggested education materials based on the patient's diagnosis for the visit.**

STEP 2: Click a diagnosis in the left pane. Suggested education displays for the diagnosis.

- Medication leaflets can be found within this window and by clicking the **Medication Leaflets** tab.

NOTE: **Click More Suggestions in the bottom right-hand corner to view additional education suggestions. If the needed education is not listed as a suggestion, conduct a search for it by completing the following steps:**

- **Click More Options. The Add Education window opens.**
- **Enter the desired education in the Search field.**
- **Click the desired education.**
- **Click the X Close button.**

STEP 3: Click the desired education. It now displays in the Added Education section.

NOTE: **To remove education, click Remove in the Added Education section.**

STEP 4: Repeat steps 2-3 as needed.

STEP 5: Modify the education, if desired.

NOTE: **To modify the education, complete the following steps:**

- **Click Modify in the Added Education section.**
- **Update the contents, as needed.**
- **Click Sign.**

STEP 6: Click **Print** to print the education individually, if needed.

NOTE: **Keep in mind that all education that has been selected will print with the patient's Ambulatory Patient Summary.**

Add a Favorite

➢ **From the Patient Education component:**

STEP 1: Click the **Favorite** icon in the row for the education to add as a favorite.

STEP 2: Select the **Personal Favorites** check box.

STEP 3: Click **Close**.

NOTE: **To access favorites, click Favorites in the Quick Suggestions header.**