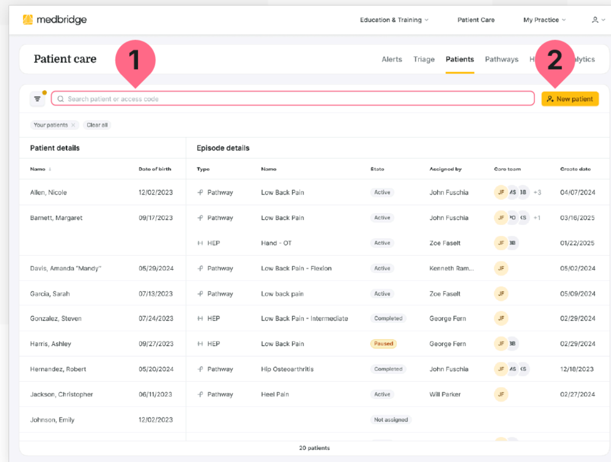
Job Aide: Getting Started With Pathways in Medbridge Care

1. Find an Existing Patient



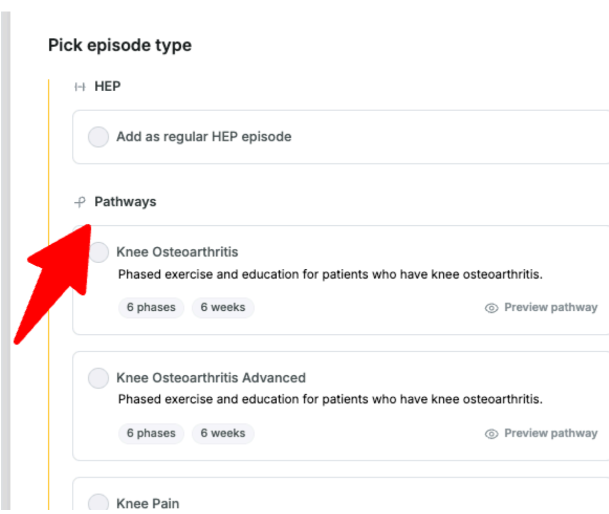
- Go to **Patients** to open the Patient List.
- Use **Search** or **Filters** (Active, Paused, My locations).
- Select the **patient name** to open the record, or select an **episode** to jump directly into it.

2. Create a New Patient

1. From the Patient List, click **New patient** (top right).
2. Enter required: **First name, Last name, DOB**.
   Add optional details: **Preferred name, Email, Phone**.
3. Toggle **Allow messaging** to allow communication.
4. Select **Add new patient**.

Tip: Make sure First Name, Last Name, and DOB are typed correctly as the patient needs these to match to log in.

3. Create a New Episode



- From the patient record, select **Create new episode**.
  - Select a **Treatment category** (drives Pathways suggestions and HEP naming).
  - Select recommended **Pathway**
  - Enable **RTM** if needed

Tip: Add care team members if other staff (e.g., PTA) may be treating patient.

4. Share the Program

→ Email	→ Text	→ QR Code
1. Select Email icon. 2. Enter patient's email address. 3. Confirm patient has given consent to receive their HEP via email. 4. Click "Send Email." 5. Patient will receive a link to access their program via Medbridge GO or the online Patient Portal.	1. Select Text message icon. 2. Enter patient's phone number. 3. Confirm patient has given consent to receive their HEP via text. 4. Click "Send Text." 5. Patient will receive a link to access their program via Medbridge GO or the online Patient Portal.	1. Select invite via QR code. 2. Ask the patient to download the Medbridge GO app. 3. Have the patient scan the QR code within the Medbridge GO app on a printout of the code

Tip: Leverage your front desk to help educate patients on the Medbridge platform through predesigned [patient resources.]

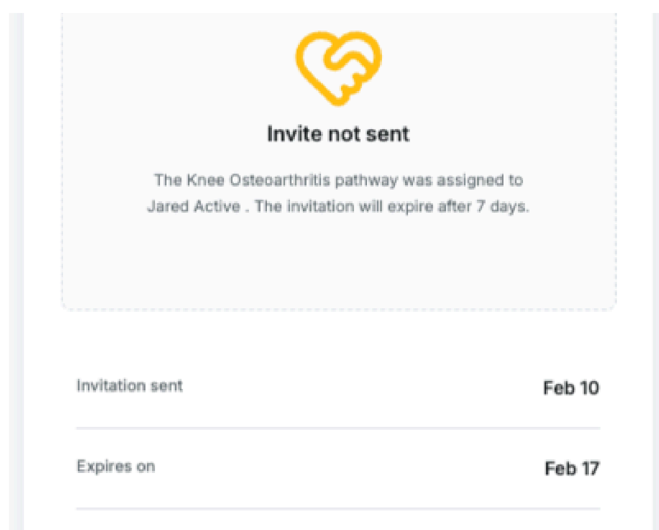
Best Practices

- Help patient accept invite and download app **during appointment**, and provide resources for the patient.
- Encourage digital access—patients are **9x more likely** to activate electronically than by print.
- Use the "Document" option to easily copy and paste your home exercise program into your EMR.

Reviewing and Managing Programs

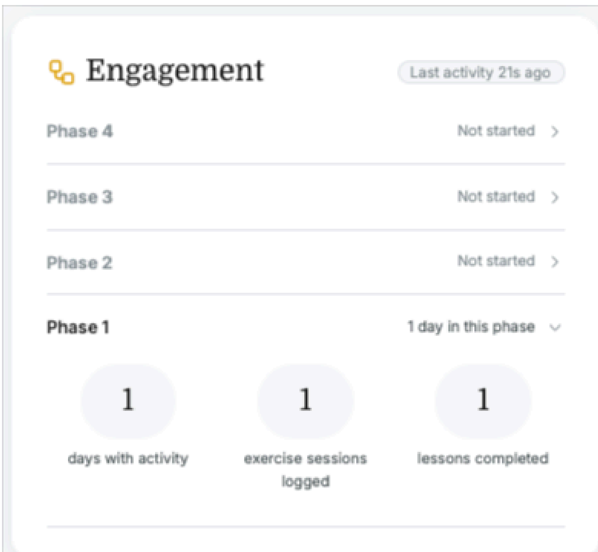
1. Track Invite Status

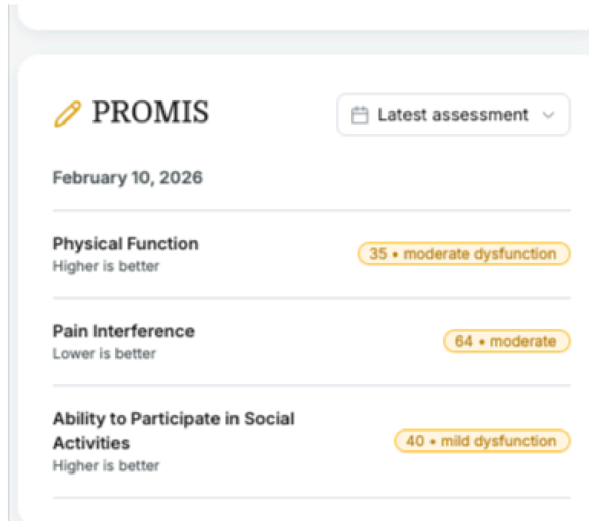
- **Patient Record → Overview**
- See **Invitation Status card** to understand if they have activated an account → Resend if needed.
- Use QR code for quick activation in the clinic.
- Access-code orgs: View codes under **HEP → Access Codes**.



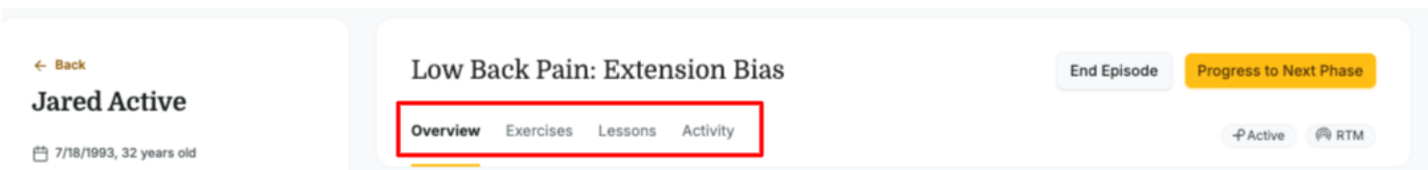
2. Monitor Activity and Outcomes

- Engagement, Outcomes, and RTM data display in their own cards.





- Click Exercises or Lessons for detailed adherence data around the program.



Tip: Check the patient record prior to every in-person visit to understand the patient's activity. Reference adherence data and any feedback to help drive accountability to home programs.

Quick Reference Tips

- ✓ Use **Favorites** for efficiency.
- ✓ Encourage **in-session app download** for best adherence.
- ✓ Document via EMR summary (copy/paste program list).
- ✓ **Digital > Print** for engagement and outcomes.

Need Help?

- Visit the [Help Center] for detailed articles.
- Contact [Medbridge Support] for assistance.