

eSyM Setup Tip Sheet

The tool developed to track and react to symptoms is eSyM (electronic symptom management) which is integrated into Patient Gateway and Epic Hyperspace.

Please review the steps below to learn how to track and follow-up with patient participants.

If you have any questions, please email esym@dfci.harvard.edu.



How to Access the eSyM Dashboard in Epic

Search for, select, and favorite the eSyM dashboard. You will only have to do this step once.



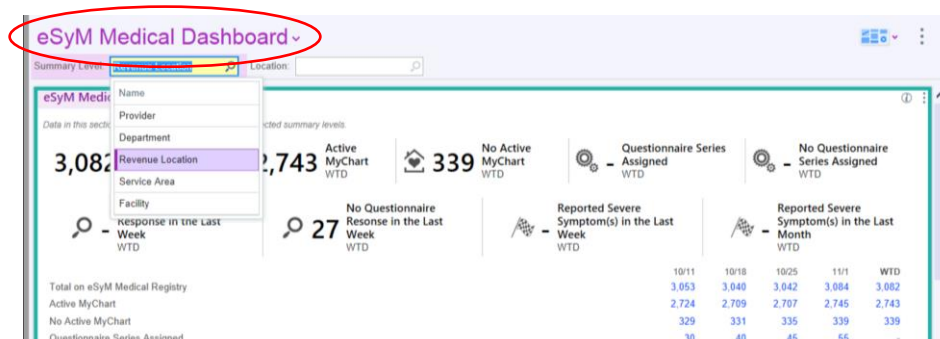
1. Log into Epic
2. From your default dashboard, click the drop-down arrow next to the name
3. In the search field, type in and search for “eSyM”
4. Click the star in the top right corner to favorite the eSyM dashboard.

Once it is favorited, you will be able to easily access the eSyM dashboard by clicking on the drop-down arrow next to the name listed on your default dashboard.



How to Run eSyM Reports from the eSyM Dashboard

1. At the top of the dashboard, you can “drill down” the metrics displayed by changing the summary level. Use “revenue location” to find all patients treated at your practice site (e.g., Milford, South Shore, Longwood), “department” to find all patients treated in your department (e.g., DF GCC), or “provider” to display all patients treated by a specific oncologist or surgeon.



- From the eSyM Dashboard, run the reports in the **eSyM Reports** component found in the bottom left of the screen.

Note that changes made to the summary level at the top of the dashboard do not automatically apply to the reports found at the bottom left of the dashboard. Each report can be customized, but this has to be done after the report has been selected and run.

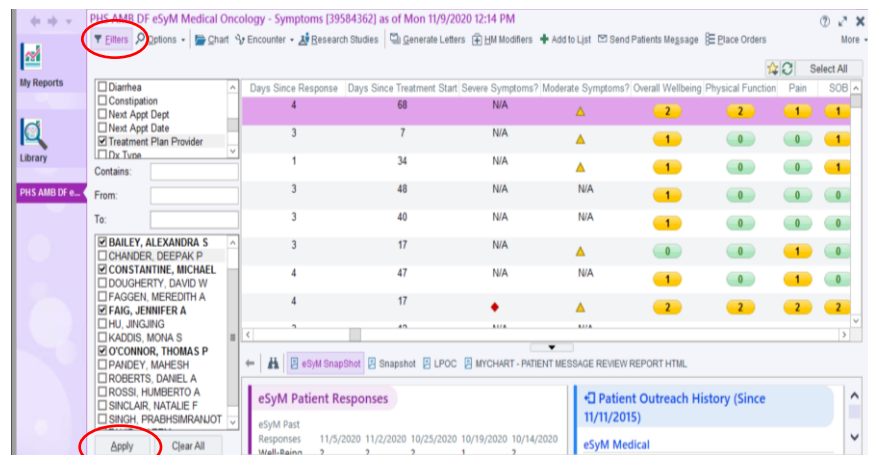


Below is a summary of the relevant report you may run:

- Patients Requiring Outreach Report:** Shows patients with an upcoming D1C1 or surgery in the next 30 days and patients who have not completed eSyM in more than 2 weeks
- All eSyM Symptoms – Weekly Report:** Shows the symptoms of all patients who have submitted an eSyM questionnaire in the last 7 days

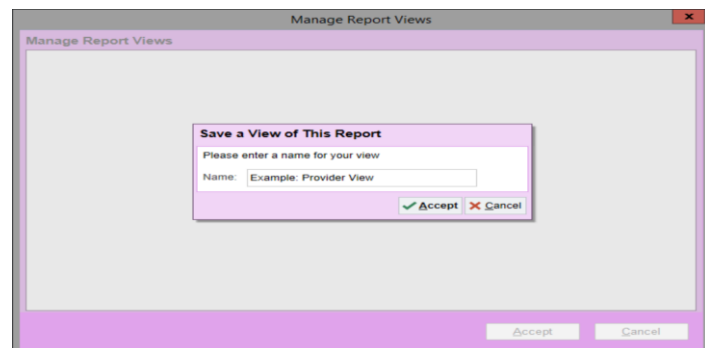
- Save your preferred report view.

- Open the report you want to view by clicking on the blue hyperlink.
- On the left-hand side, click on the “Filters” button
- In the window that opens, select the columns you want to filter by. Common options include: Next appt dept and/or treatment plan provider
- Click apply in the bottom left-hand corner



- If this is the view you’ll want to see most often, click on the start icon in the upper right-hand corner of the report. Click save view, type in a report name, and click accept

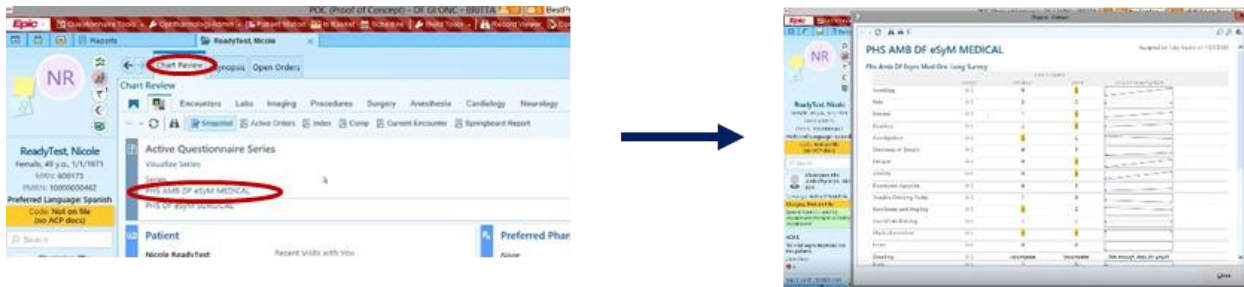
| | Pain ^{▲2} | SOB | Nausea | Vomiting | Diarrhea | Constipation |
|---|--------------------|-----|--------|----------|----------|--------------|
| n | 0 | 0 | 0 | 0 | 0 | 0 |
| | 2 | 0 | 1 | 1 | 0 | 0 |
| | 0 | 0 | 1 | 1 | 0 | 1 |
| | 2 | 1 | 0 | 0 | 0 | 1 |
| | 3 | 3 | 0 | 0 | 0 | 0 |





How to View an Individual Patient's Reports

1. Open a patient's chart and view the active questionnaire series assignments under the snapshot report
2. If a patient is eligible for eSyM, there will be link to their most recent responses
3. Click on "PHS AMB DF eSyM Medical" under Active Questionnaire Series section.



4. Clicking on "Visualize Series" under the Active Questionnaire Series section will open a form that includes arrows to easily identify symptoms reported with an increase or decrease since the patient's last eSyM submission.

Active Questionnaire Series Expand All Collapse All

PHS AMB DF eSyM MEDICAL Submitted 11/5/20 Assigned 10/8/20

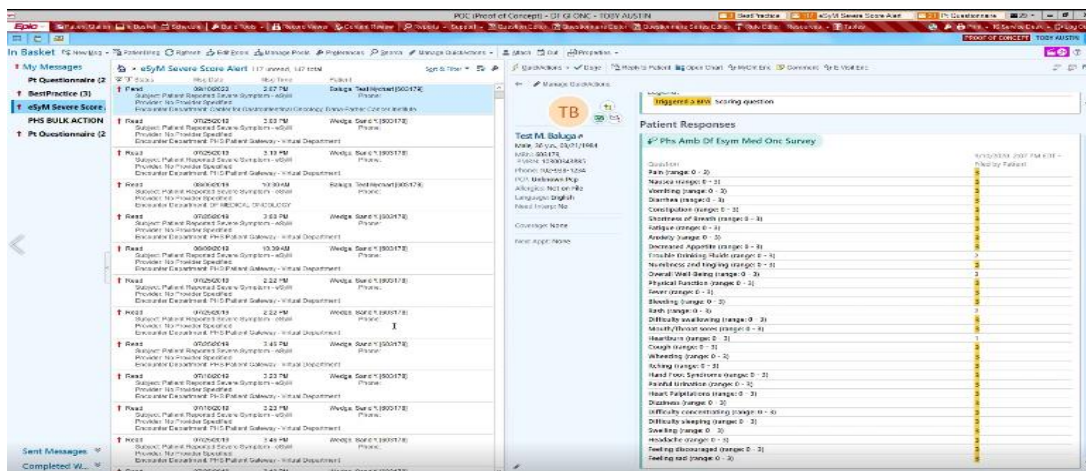
| | | | | | |
|-------------------------|------------|-----------------------|------------|--------------------------|------------|
| Vomiting | 0 | Pain | 1 | Nausea | 1 |
| Diarrhea | 1 | Constipation | 0 | Shortness of breath | 1 |
| Fatigue | 2 | Anxiety | 1 | Decreased Appetite | 0 |
| Trouble Drinking Fluids | 0 | Numbness and tingling | 2 | Overall Well-Being | 2 |
| Physical Function | 2 | Fever | 0 | Bleeding | Incomplete |
| Rash | 0 | Difficulty swallowing | Incomplete | Mouth/Throat sores | Incomplete |
| Heartburn | 1 | Cough | Incomplete | Wheezing | Incomplete |
| Itching | Incomplete | Hand Foot Syndrome | Incomplete | Painful Urination | Incomplete |
| Heart Palpitations | Incomplete | Dizziness | Incomplete | Difficulty concentrating | 1 |
| Difficulty sleeping | Incomplete | Swelling | Incomplete | Headache | 1 |
| Feeling discouraged | Incomplete | Feeling sad | Incomplete | | |

5. Patient responses can also be viewed under flowsheets and the encounters tab.



eSyM InBasket Messages

1. An InBasket message will be generated for all reported severe symptoms. One message will be sent for each questionnaire with a summary of all reported symptoms.
2. Please resolve and/or forward these messages accordingly.
3. Use your clinical judgment. Responses are not mandated.





How to Document eSyM Patient Outreach

1. From any eSyM report, highlight the patient you have contacted and click on the **'Track Patient Outreach'** button

| MRN | Patient | DOB | Age Sex | Language | SO? | MO? | MyChart Status | Last Pt Outreach | Next Pt Outreach |
|--------|------------------|------------|--------------|----------|----------|--------|----------------|------------------|------------------|
| 601540 | Rubble, Barney | 01/01/1971 | 48 y.o. Male | English | Inactive | Active | Inactivated | 06/06/2019 | Not Specified |
| 603260 | Freecare, Freddy | 01/02/1922 | 97 y.o. Male | african | Inactive | Active | Inactivated | | Not Specified |

2. Enter how you contacted the patient
3. Under Contacted About, select **'eSyM Medical'**
4. Include a follow-up date if you wish
5. Select **Accept**
6. This info will populate in the Last and Next Outreach Date columns

Track Patient Outreach

Date: 6/6/2019 Time: 4:35 PM

Contacted via: Telephone (selected)

Contacted about: eSyM Medical (selected)

Number of patients selected: 1

Accept (highlighted) Cancel

Please keep in mind:

- No responses are required
- Follow your regular workflow
- This feature gives you the option to document if you reach out to patient to enroll or to nudge them to report



How to Document Patient Symptom Management

You can pull a patient's symptoms responses into your notes using smartphrases:

- .eSyM
- .eSyMall

Chart Review

Encounters Labs Imaging Procedures Surgery Anesthesia Cardiology Neurology Meds Notes Letter

Refresh (4:00 PM) Route Review Selected Preview Tag Add to Bookmarks

Filters Default Filter Me Department Op Notes Discharge Consults Progress Note Providers ACP Notes

Service Date Filing Date Enc Type Dept Specialty Author Note Type

Yesterday... 11/04/2020... Telephone DFMN Infusion Therapy Telephone

Telephone Encounter Addendum Encounter Date: 11/4/2020

Left VM 11/4 at 11:08am in response to e-sym scoring.
Pt has an appt today
Notified Emily of esym scores.

eSyM Past Responses 11/4/2020

| | |
|--------------------------|----|
| Well-Being | 3 |
| Physical Function | 3 |
| Pain | 3 |
| Nausea | 3 |
| Vomiting | 3 |
| Diarrhea | 0 |
| Constipation | 3 |
| Shortness of Breath | 1 |
| Fatigue | 3 |
| Anxiety | 2 |
| Bleeding | -- |
| Cough | -- |
| Decreased Appetite | 3 |
| Difficulty Concentrating | -- |
| Dizziness | -- |
| Feeling Discouraged | 1 |
| Feeling Sad | -- |
| Fever | 0 |
| Hand and Foot Redness | -- |
| Headache | 3 |
| Heart Palpitation | 1 |
| Heartburn | 1 |
| Itching | -- |
| Mouth and Throat Sores | 2 |
| Numbness and Tingling | 0 |
| Painful Urination | -- |

eSyM smartphrase used to pull in past responses



How to Track a Panel of Patients

1. Run the 'All eSyM Symptoms – Weekly' Report from the hyperlink on the eSyM Dashboard.
2. Key things to keep in mind:
 - Red indicates a score of 3, a severe symptom.
 - Yellow indicates a score of 1-2, a mild or moderate symptom.
 - Green indicates a score of 0, no symptoms.
3. Follow-up with these patients using your clinical judgement.

| MRN | Patient | Age | Next Appt Date | Treatment Plan | Dx Type | Days Since Survey | Days Since Tr | Severe Symptoms? | Moderate Symptoms? | Overall Wellbeing | Physical Function | Pain | SOB | Nausea | Vomiting | Diarrhea | Constipation |
|---------|-------------|---------|----------------|----------------|---------|-------------------|---------------|------------------|--------------------|-------------------|-------------------|------|-----|--------|----------|----------|--------------|
| E259469 | Esym, Three | 32 y.o. | | | | 0 | X | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| E259471 | Esym, Five | 34 y.o. | | | | 0 | X | | 0 | 1 | 1 | 2 | 0 | 1 | 1 | 0 | 0 |
| E259470 | Esym, Four | 33 y.o. | | | | 0 | X | 1 | 0 | 2 | 2 | 0 | 0 | 1 | 1 | 0 | 1 |
| E259468 | Esym, Two | 31 y.o. | | | | 0 | X | | 0 | 2 | 1 | 2 | 1 | 0 | 0 | 0 | 1 |
| E259467 | Esym, One | 30 y.o. | | | | 0 | X | 1 | 0 | 3 | 1 | 3 | 3 | 0 | 0 | 0 | 0 |

Recommendations for using the 'All eSyM Symptoms – Weekly' Report:

- 1) ONNs recommended to review 2 times/week to identify patients who recently reported multiple grade 2 symptoms (i.e., three or more grade-2 symptoms) but no grade 3 symptoms; these patients will not automatically appear in the InBasket, however it may be beneficial to follow- up with them.
- 2) If a clinician is away from clinic, ONNs use the Symptom Report to review responses for that clinician's patients to ensure that all grade 3 symptoms have been addressed.
- 3) Practice coordinators review the Symptom Report weekly to see which symptoms are commonly reported as severe and determine if any patterns emerge that could warrant further investigation.

Recommendations for using the 'Patients Requiring Outreach' Report:

- 1) Practice coordinators review the Patients Requiring Outreach report on Friday to see if any patients coming into clinic the following week could be approached to encourage them to respond to eSyM prompts.



How to Add the eSyM Column to Your Schedule View

- 1) On your schedule view, select the wrench button.
- 2) You will then search for 'eSyM Assigned' under the available columns section.
- 3) Click 'Add Column' and then 'Accept' to add this column to your view.

Please note: The 'eSyM Assigned' column will display a green circle when an eligible patient has been assigned the eSyM questionnaire and a grey square when eSyM is not assigned. This column can also be added to the DAR.

