



My Patient Summary

User Guide

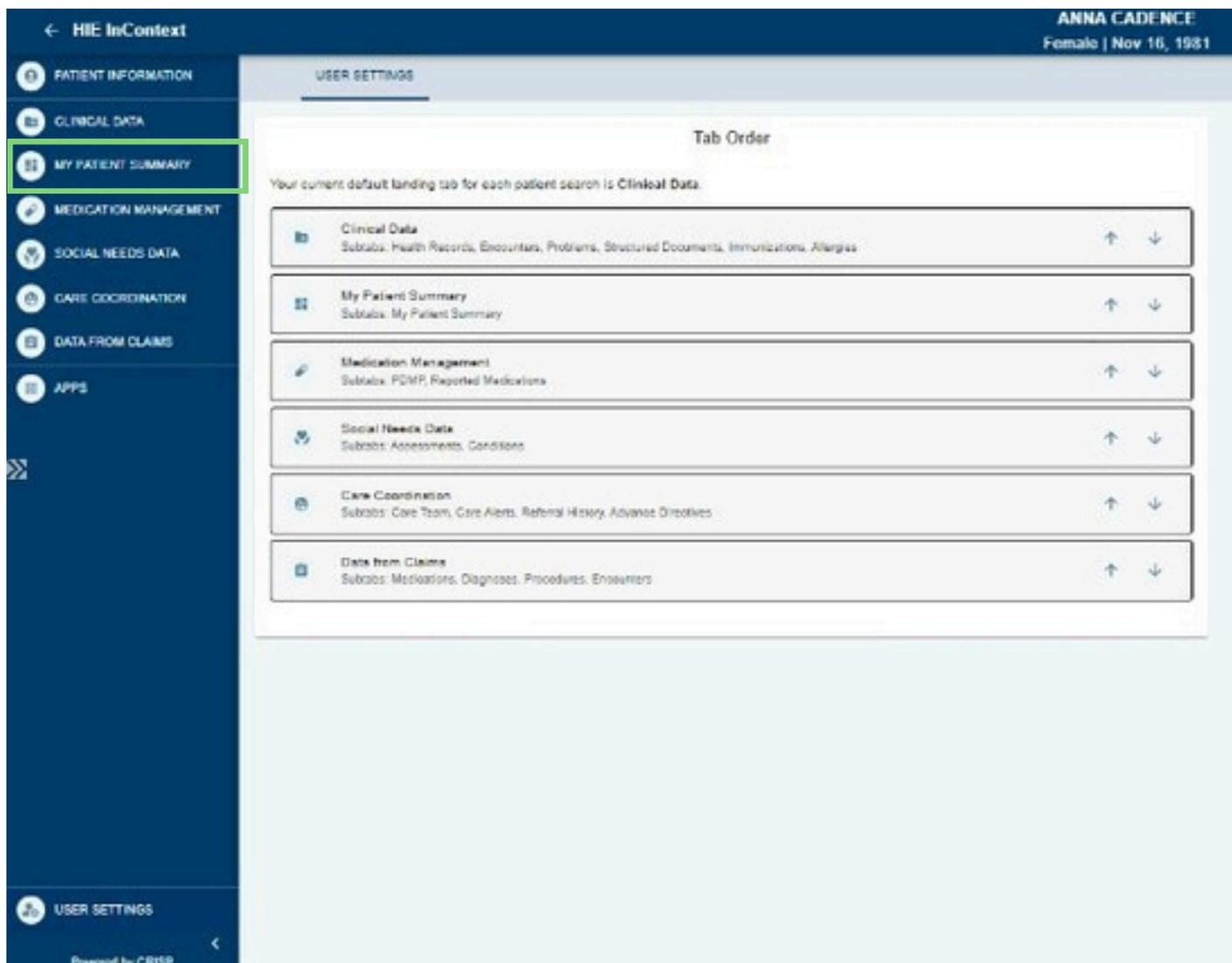
What is My Patient Summary.

My Patient Summary is designed to save users time locating regularly viewed patient data within InContext. This feature **enables users to customize a unique tab and/or landing page containing self-selected priority data views**, so that users can quickly access the data most important to them without the hassle of excess clicks and toggling through different data tabs.

This editable dashboard focuses on giving users control from start to finish - it's a space built for their needs and their needs only. Users can configure their unique view by pinning up to 8 tabs, eliminating repetitive time spent clicking through InContext looking for the data they commonly need.

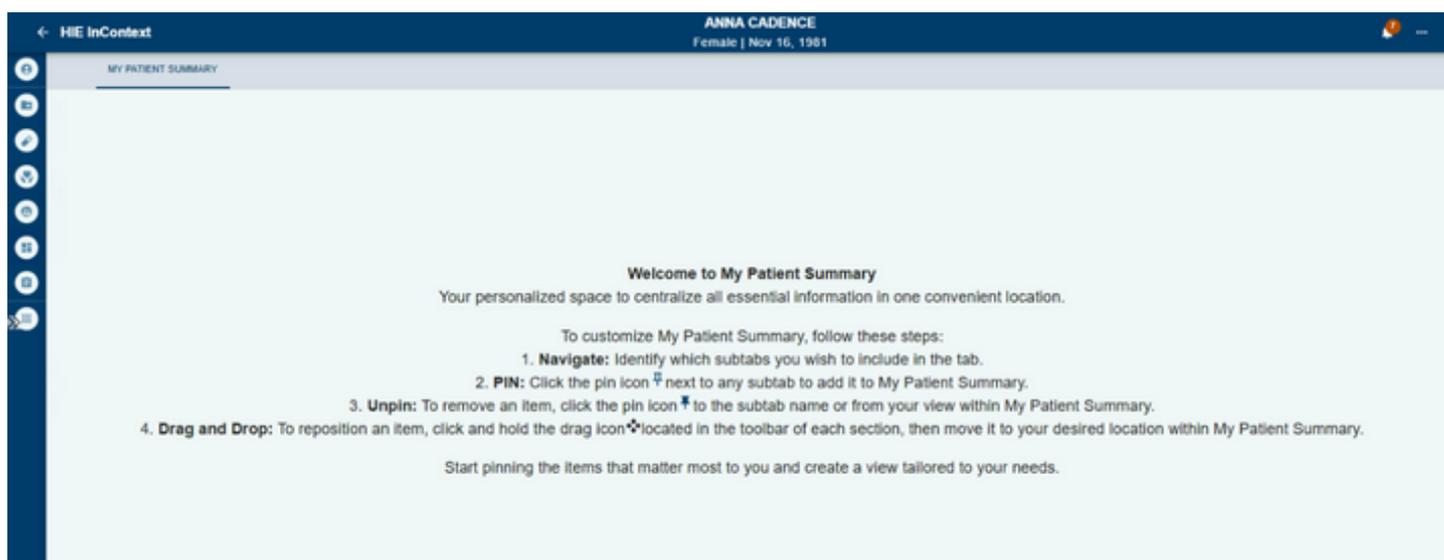
How to Access

Available through both the web-based portal and EHR application, My Patient Summary can be found on the left side panel of InContext.



Set Up

Upon clicking into My Patient Summary, users will find instructions on how to configure their view.

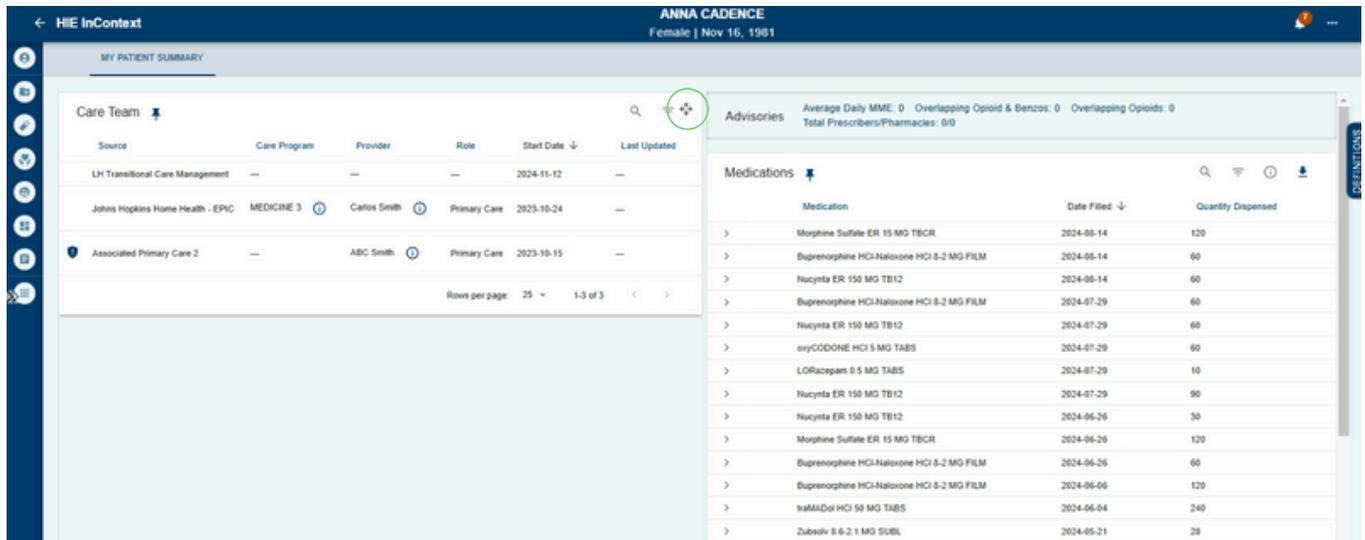


Customization: Pinning/Un-pinning Tabs

Users can pin up to 8 tabs/subtabs from within InContext to their My Patient Summary tab. This can be done by locating the pin icon next to the title of each data tab/subtab.

Enhanced Customization: Reordering pinned tabs/subtabs

To reorder pinned tabs within My Patient Summary in order of preference, the reorder button can be found on the top right of each quadrant/table. Clicking on the button and dragging the table will allow users to arrange the order of pinned tabs/subtabs as they wish.

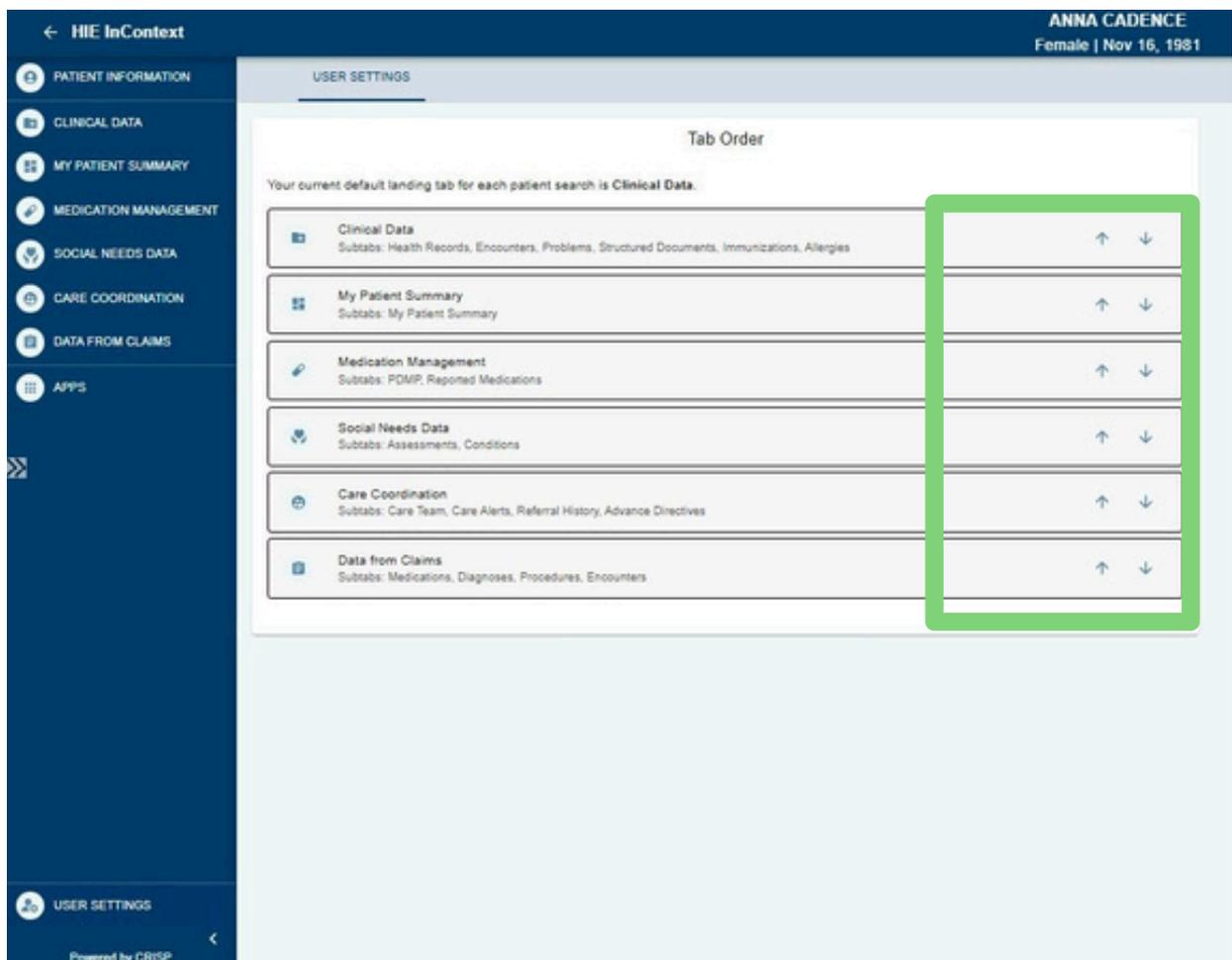


The screenshot displays the 'MY PATIENT SUMMARY' page for 'ANNA CADENCE', Female, born Nov 16, 1981. The interface is divided into several sections:

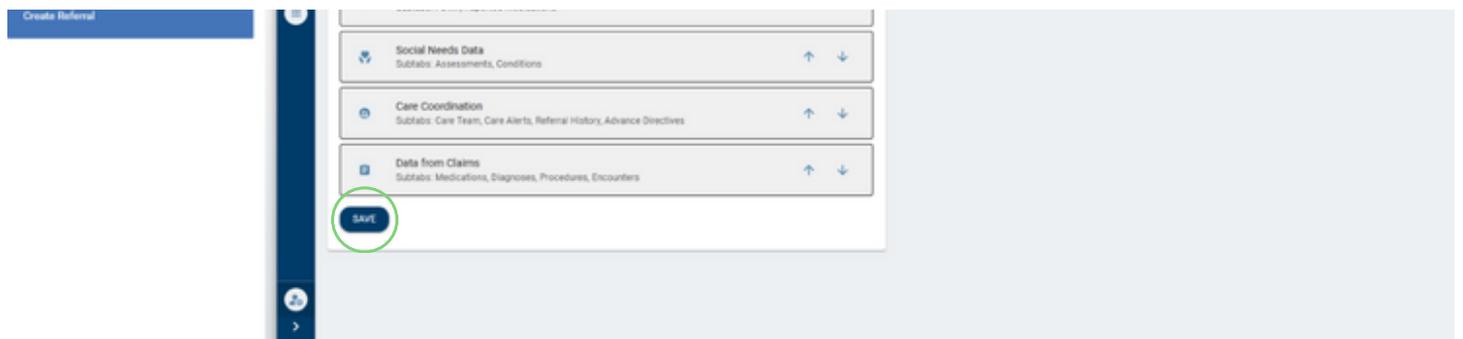
- Care Team:** A table with columns: Source, Care Program, Provider, Role, Start Date, and Last Updated. It lists three providers: 'LH Transitional Care Management', 'Johns Hopkins Home Health - EPIC MEDICINE 3' (Carlos Smith), and 'Associated Primary Care 2' (ABC Smith). A green circle highlights a reorder icon (four arrows) in the top right corner of this table.
- Advisories:** A section showing 'Average Daily MME: 0', 'Overlapping Opioid & Benzos: 0', 'Overlapping Opioids: 0', and 'Total Prescribers/Pharmacies: 0/0'.
- Medications:** A table with columns: Medication, Date Filled, and Quantity Dispensed. It lists various medications such as Morphine Sulfate ER 15 MG TBCR, Buprenorphine HCl/Naloxone HCl 8-2 MG FILM, Nycynta ER 150 MG TB12, and others, with their respective dates and quantities.

How to Set as Landing Page

My Patient Summary can be made a user's default landing page for InContext. Navigate to User Settings, then use the arrows to reorder the tab arrangement. The tab on the top will become the new landing page.

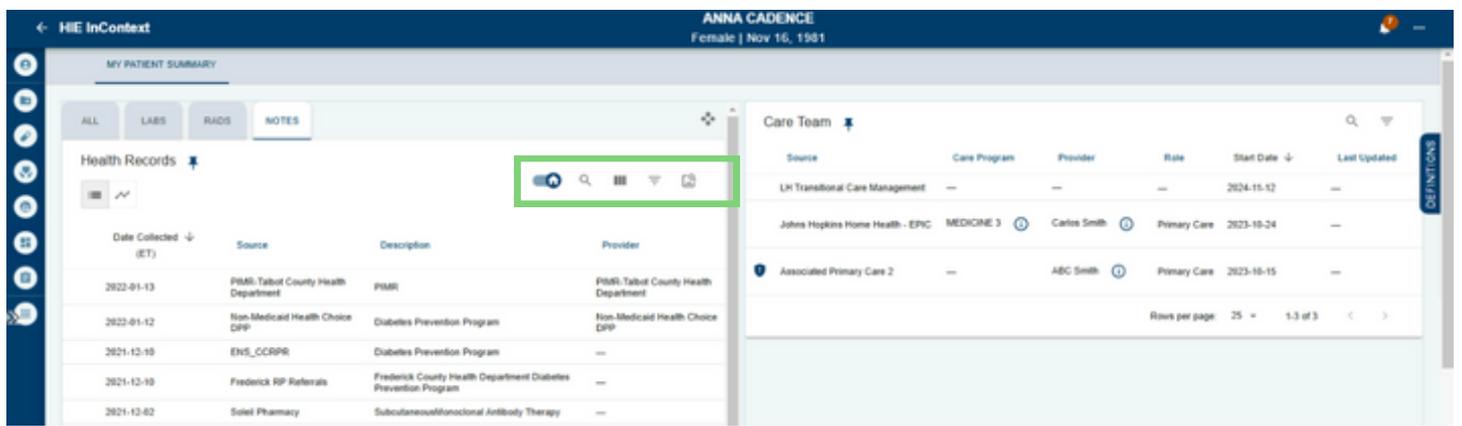


Once the tab order has been arranged, click "Save".



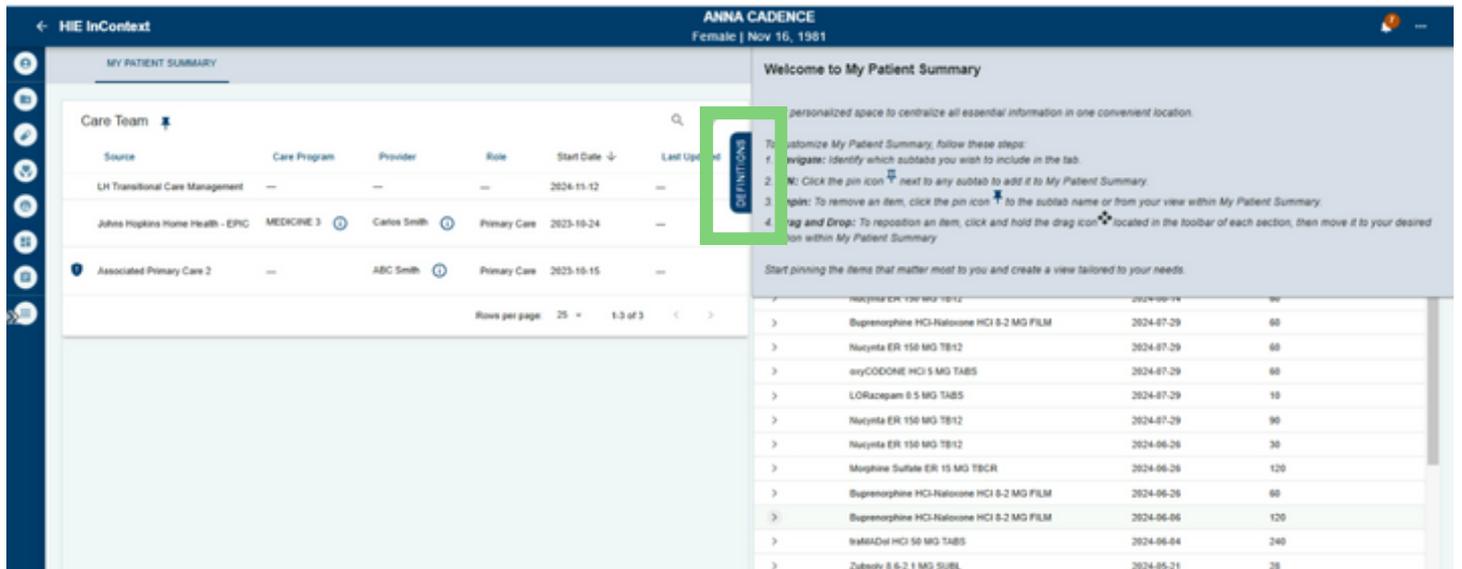
Advanced Search and Filtering

Users are also able to use the search, filter and hide My Organization Data features on a specific pinned tab/subtab. These can be found in the top right corner.



Easy-access Instructions

To quickly access instructions for My Patient Summary once the feature has been configured, users can click on the retractable drawer labelled “Definitions” in the top right corner of the dashboard. The instruction tab remains stationary and easily accessible whenever the dashboard has at least one tab pinned to it.



FAQs

- **Would a user need to configure their My Patient Summary each time they look up a patient?**

No. Once My Patient Summary has been configured with pinned tabs, the same view persists until the user adjusts their chosen pinned tabs. Users may remove their pinned tabs at any time.

- **How many tabs/subtabs can a user pin within My Patient Summary?**

Users can choose to select up to 8 tabs/subtabs.

- **Once My Patient Summary is live, will it automatically present itself in InContext as the user's landing page?**

No. To make My Patient Summary their landing page, users need to arrange the feature as the top tab in the Tab Order section in their user settings. Once user settings have been saved, My Patient Summary will be their InContext landing page.

- **Can users access My Patient Summary through the web portal or only through the EHR application?**

Regardless of how users access InContext, My Patient Summary is available to all users through both the web portal and EHR application.

Is My Patient Summary only applicable for users at the frontline of care?

My Patient Summary is a helpful feature for all InContext users regardless of their role or use. For users like care navigators or care coordinators, pinning highly utilized tabs such as demographics, care team and social needs data can save users unnecessary clicks and help users get to the data they need, quickly.