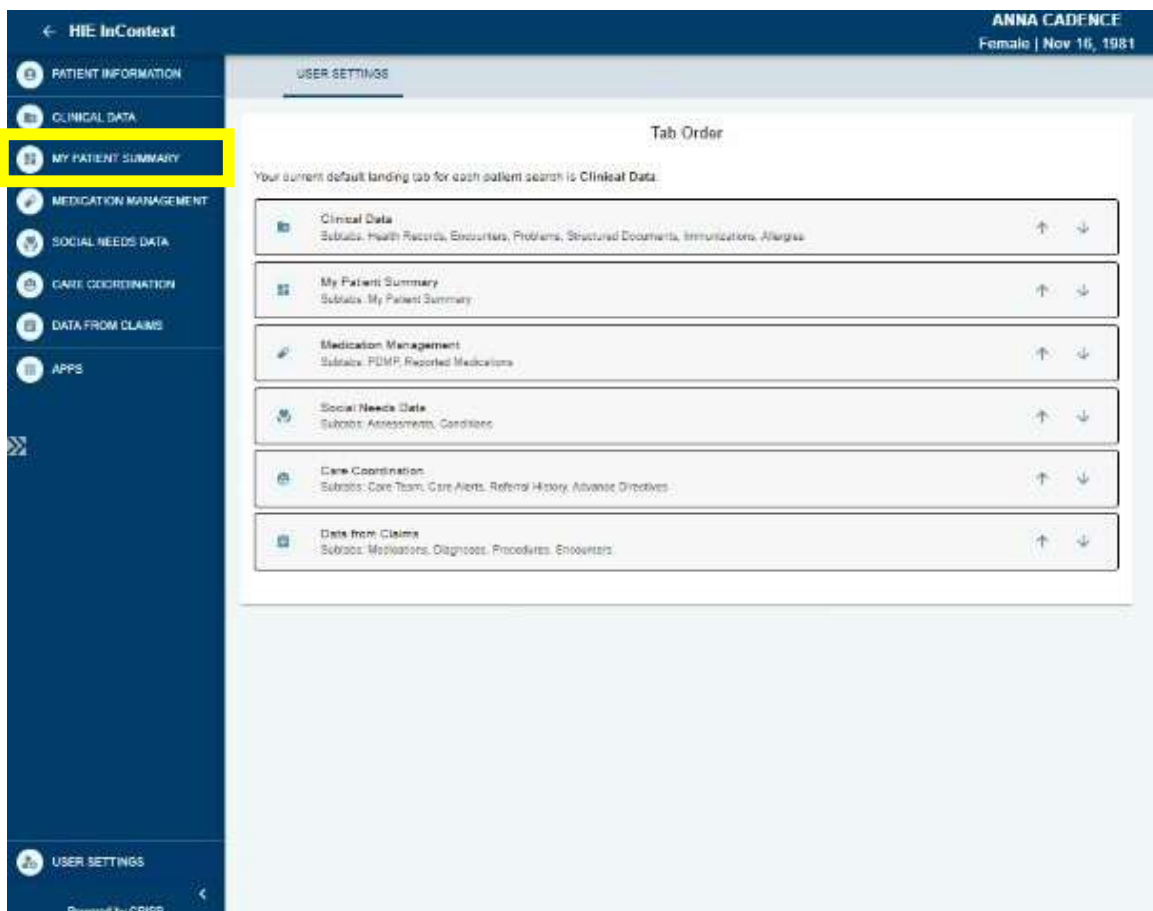# CRISP

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.

Once clicked, the pin icon becomes solid blue *(color filled)*, and users will find that specific tab/subtab displayed in the My Patient Summary dashboard.

To unpin, locate the blue pin icon by the title of the tab/subtab to remove it from the dashboard. This can be done from the My Patient Summary view as well.

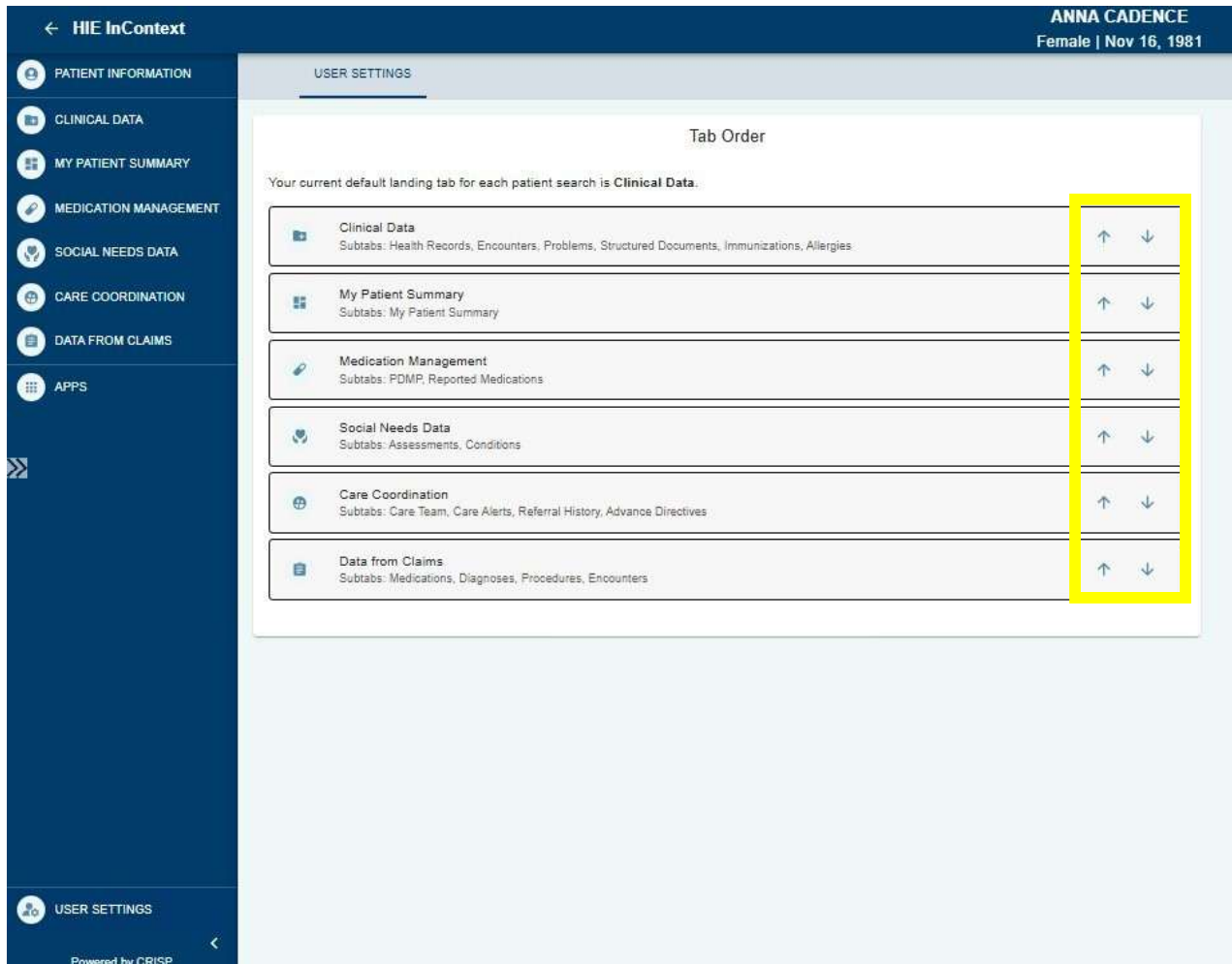## Enhanced Customization: Reordering pinned tabs/subtabs

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.

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.
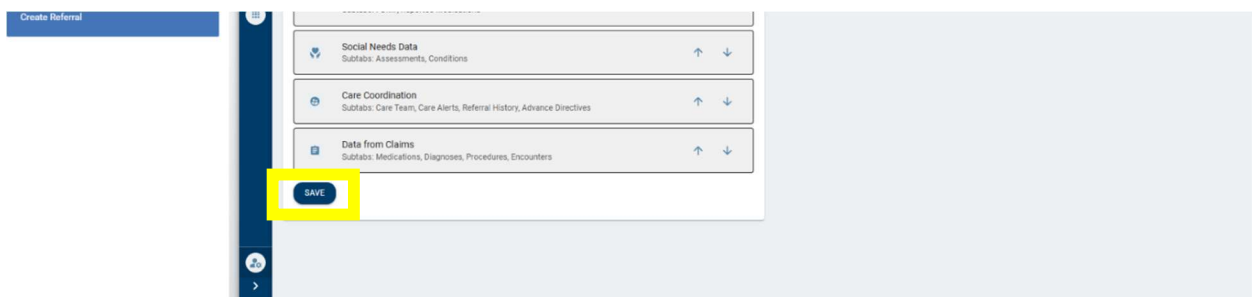

Once the tab order has been arranged, click "Save".

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.