

My Patient Summary User Guide

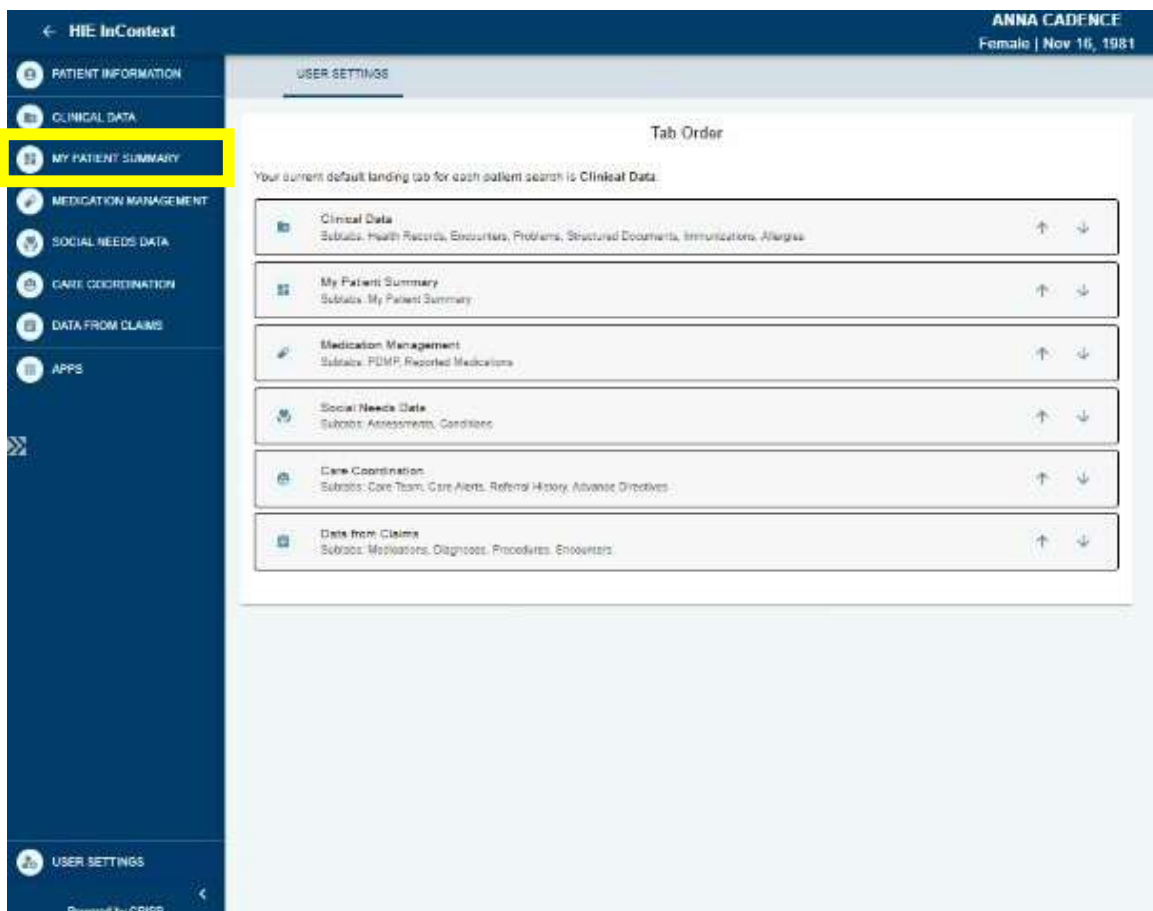
What is My Patient Summary

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.



The screenshot shows the 'USER SETTINGS' page in the InContext application. The left sidebar contains a list of navigation options: PATIENT INFORMATION, CLINICAL DATA, MY PATIENT SUMMARY (highlighted with a yellow box), MEDICATION MANAGEMENT, SOCIAL NEEDS DATA, CARE COORDINATION, DATA FROM CLAIMS, and APPS. The main content area is titled 'Tab Order' and displays a list of six tabs that can be configured. The current default landing tab is 'Clinical Data'. Each tab entry includes a subtab list and up/down arrows for reordering.

Tab Name	Subtabs	Order
Clinical Data	Health Records, Encounters, Problems, Structured Documents, Immunizations, Allergies	1 (Default)
My Patient Summary	My Patient Summary	2
Medication Management	PDMF, Reported Medications	3
Social Needs Data	Assessments, Conditions	4
Care Coordination	Core Team, Care Alerts, Referral History, Advance Directives	5
Data from Claims	Medications, Diagnoses, Procedures, Encounters	6






Set Up

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

Welcome to My Patient Summary
Your personalized space to centralize all essential information in one convenient location.

To customize My Patient Summary, follow these steps:

1. **Navigate:** Identify which subtabs you wish to include in the tab.
2. **PIN:** Click the pin icon  next to any subtab to add it to My Patient Summary.
3. **Unpin:** To remove an item, click the pin icon  to the subtab name or from your view within My Patient Summary.
4. **Drag and Drop:** To reposition an item, click and hold the drag icon  located in the toolbar of each section, then move it to your desired location within My Patient Summary.

Start pinning the items that matter most to you and create a view tailored to your needs.

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.

The screenshot shows the 'Care Team' tab selected and pinned. The pin icon next to the 'Care Team' title is solid blue. Below the tab is a table with the following data:

Source	Care Program	Provider	Role	Start Date ↓	Last Updated
LH Transitional Care Management	—	—	—	2024-11-12	—
Johns Hopkins Home Health - EPIC	MEDICINE 3	Carlos Smith	Primary Care	2023-10-24	—
Associated Primary Care 2	—	ABC Smith	Primary Care	2023-10-15	—

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.

The screenshot shows the 'Care Team' tab selected and unpinned. The pin icon next to the 'Care Team' title is hollow. A tooltip above the pin icon reads 'Unpin tab from My Patient Summary'. The table below the tab is identical to the previous screenshot.



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.

The screenshot shows the 'MY PATIENT SUMMARY' view for 'ANNA CADENCE, Female | Nov 16, 1981'. The 'Health Record' tab is active and pinned, with a blue pin icon highlighted by a yellow circle. The tab title is 'Health Record' and it is pinned to the 'My Patient Summary' dashboard. Below the tab, a table lists health records with columns for Date Collected, Source, Description, and Provider.

Date Collected	Source	Description	Provider
2022-07-21	CRISP_REFER	Referral for further care	---
2022-07-08	CRISP_REFER	Referral for further care	---
2022-07-08	CRISP_REFER	Referral for further care	---
2022-07-08	CRISP_REFER	Referral for further care	---
2022-06-17	CRISP_REFER	Referral for further care	---
2022-06-17	CRISP_REFER	Referral for further care	---
2022-05-03	CRISP_REFER	Referral for further care	---
2022-04-08	MedStar Franklin Square Hospital Center	Example PDF 7	MedStar Franklin Square Hospital Center
2022-02-15	CRISP_REFER	Referral for further care	---
2022-02-15	CRISP_REFER	Referral for further care	---
2022-02-15	CRISP_REFER	Referral for further care	---
2022-02-15	CRISP_REFER	Referral for further care	---
2022-02-15	CRISP_REFER	Referral for further care	---
2022-02-15	CRISP_REFER	Referral for further care	---
2022-02-15	CRISP_REFER	Referral for further care	---
2022-02-15	CRISP_REFER	Referral for further care	---

Enhanced Customization: Reordering pinned tabs/subtabs

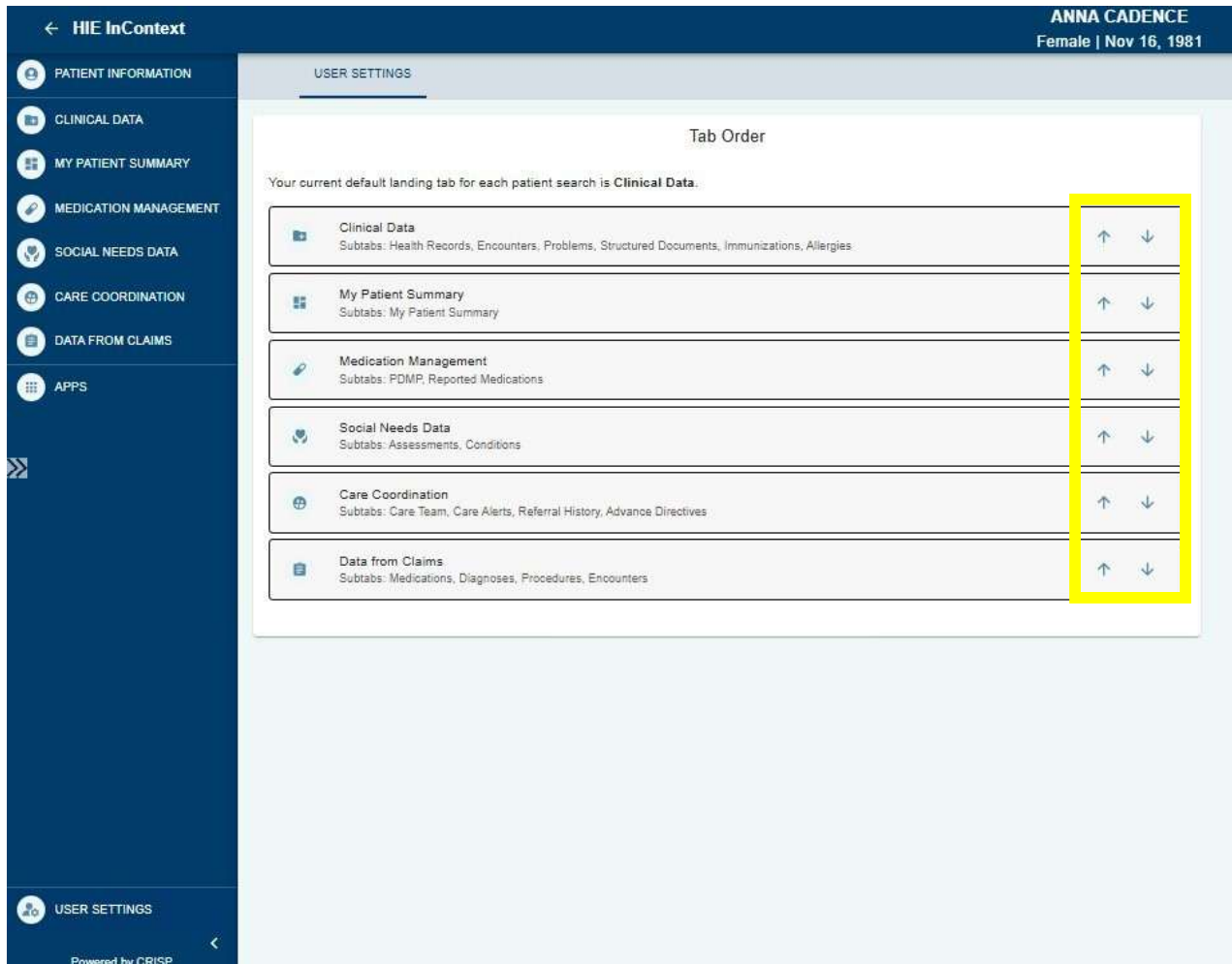
To reorder pinned tabs within My Patient Summary in order of preference, the reorder button can be found on the top right of each quadrant/table. Clicking on the button and dragging the table will allow users to arrange the order of pinned tabs/subtabs as they wish.

The screenshot shows the 'MY PATIENT SUMMARY' view for 'ANNA CADENCE, Female | Nov 16, 1981'. The 'Care Team' table is visible, and a reorder button (a blue icon with four arrows) is highlighted by a yellow circle. The table lists care team members with columns for Source, Care Program, Provider, Role, Start Date, and Last Updated.

Source	Care Program	Provider	Role	Start Date	Last Updated
LH Transitional Care Management	---	---	---	2024-11-12	---
Johns Hopkins Home Health - EPIC	MEDICINE 3	Carlos Smith	Primary Care	2023-10-24	---
Associated Primary Care 2	---	ABC Smith	Primary Care	2023-10-15	---

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.

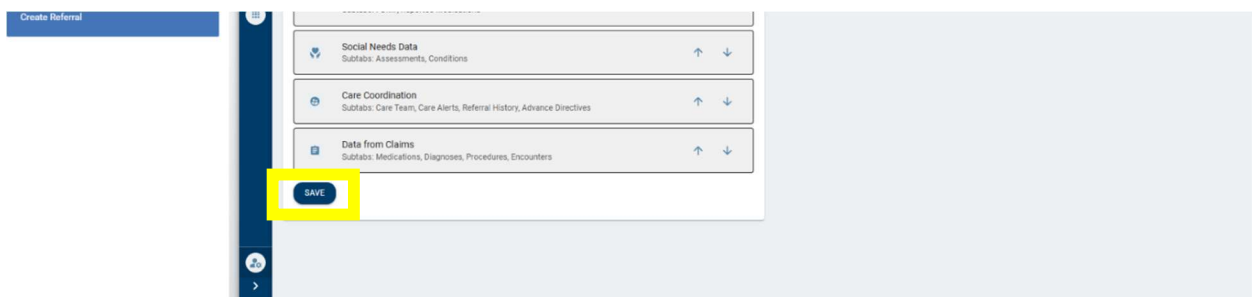


The screenshot shows the 'USER SETTINGS' page in the InContext interface. The left sidebar contains navigation options: PATIENT INFORMATION, CLINICAL DATA, MY PATIENT SUMMARY, MEDICATION MANAGEMENT, SOCIAL NEEDS DATA, CARE COORDINATION, DATA FROM CLAIMS, and APPS. The main content area is titled 'Tab Order' and displays a list of tabs with their subtabs. The current default landing tab is 'Clinical Data'. The tabs are arranged as follows:

Tab Name	Subtabs	Move Up Arrow	Move Down Arrow
Clinical Data	Health Records, Encounters, Problems, Structured Documents, Immunizations, Allergies	↑	↓
My Patient Summary	My Patient Summary	↑	↓
Medication Management	PDMP, Reported Medications	↑	↓
Social Needs Data	Assessments, Conditions	↑	↓
Care Coordination	Care Team, Care Alerts, Referral History, Advance Directives	↑	↓
Data from Claims	Medications, Diagnoses, Procedures, Encounters	↑	↓

The arrows for each tab are highlighted with a yellow box. The top of the page shows 'HIE InContext' and 'ANNA CADENCE Female | Nov 16, 1981'. The bottom of the page shows 'USER SETTINGS' and 'Powered by CRISP'.

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



The screenshot shows the 'Create Referral' page in the InContext interface. The left sidebar contains navigation options: SOCIAL NEEDS DATA, CARE COORDINATION, and DATA FROM CLAIMS. The main content area displays a list of tabs with their subtabs. The tabs are arranged as follows:

Social Needs Data	Assessments, Conditions	↑	↓
Care Coordination	Care Team, Care Alerts, Referral History, Advance Directives	↑	↓
Data from Claims	Medications, Diagnoses, Procedures, Encounters	↑	↓

The 'SAVE' button is highlighted with a yellow box. The top of the page shows 'Create Referral'. The bottom of the page shows a navigation bar with a back arrow and a forward arrow.



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.

The screenshot shows the 'MY PATIENT SUMMARY' dashboard for ANNA CADENCE. The 'Health Records' section is active, displaying a table of records. A yellow box highlights the toolbar of the Health Records section, which includes icons for search, filter, and hide. The 'Care Team' section is also visible on the right side of the dashboard.

Date Collected (ET)	Source	Description	Provider
2022-01-13	PIMR, Talbot County Health Department	PIMR	PIMR, Talbot County Health Department
2022-01-12	Non-Medicaid Health Choice DPP	Diabetes Prevention Program	Non-Medicaid Health Choice DPP
2021-12-10	ENS_CCRPR	Diabetes Prevention Program	—
2021-12-10	Frederick RP Referrals	Frederick County Health Department Diabetes Prevention Program	—
2021-12-02	Soleil Pharmacy	Subcutaneous/Monoclonal Antibody Therapy	—

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.

The screenshot shows the 'MY PATIENT SUMMARY' dashboard with the 'Definitions' drawer open. The drawer contains instructions for navigating, pinning, and dragging items. The 'Care Team' section is visible in the background.

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Item Name	Date	Value
Buprenorphine HCl-Naloxone HCl 8-2 MG FILM	2024-07-29	60
Nucynta ER 150 MG TB12	2024-07-29	60
oxyCODONE HCl 5 MG TABS	2024-07-29	60
LORazepam 0.5 MG TABS	2024-07-29	10
Nucynta ER 150 MG TB12	2024-07-29	90
Nucynta ER 150 MG TB12	2024-06-26	30
Morphine Sulfate ER 15 MG TBCR	2024-06-26	120
Buprenorphine HCl-Naloxone HCl 8-2 MG FILM	2024-06-26	60
Buprenorphine HCl-Naloxone HCl 8-2 MG FILM	2024-06-06	120
tramADol HCl 50 MG TABS	2024-06-04	240
Zubsolv 8.6-2.1 MG SUBL	2024-05-21	28