



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.



<u>Set Up</u> 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.

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Θ	_	CARE TEAM CARE ALERTS REFERRAL HISTORY ADVANCE	DIRECTIVES								
∎ ⊘	Care	Tean	Care Program	Provider	Rote	Start Date 🕁		Last Unda	and a	Q,	Ŧ
۲		LH Transitional Care Management	-	-	-	2024-11-12		-			
0		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		-			
۹							Rows per page:	25 +	1-3 of 3	¢	>

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.

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ž	Source	Care Program	Provider	Role	Start Date 🖕	Last Updated	
Š	LH Transitional Care Management	-	-	-	2024-11-12	-	
0	Johns Hopkins Home Health - EPIC	MEDICINE 3 ()	Carlos Smith ()	Primary Care	2023-10-24	-	
8	Associated Primary Care 2	-	ABC Smith	Primary Care	2023-10-15	-	
۲						Rows per page: 25 + 1-3 of 3	\longleftrightarrow

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.

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	Data Collected &	Source	Description	Provider		
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	2002-07-09	CHISP, ADVEN	Referral for further care	-		
	2022-07-05	CRISP_REFER	Referal for further care	-		
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	2012-05-17	CRISP_REFER	Referal for further care	-		
	2022-00-17	CRISP, REFER	Raferol for further care	-		
	2022-05-63	CRISP_REFER	Related for further care	-		
•	2022-04-08	Mediar Frankin Square Hospital Center	Exemple PDF 7	MedDar Franklin Square Hospital Center		
	2022-02-18	OR OP_REFER	Referal for further care	-		
	2602-80-18	CRISP_REPER	Referal for further care	-		
	2022-02-18	CRIDP_REFER	Referal for further care	-		
	2022-02-19	CRISP, REPER	Referal for further care	-		
	2022-00-15	CRISP_REFER	Referal for further care.	-		
	2022-00-19	CRISP, REFER	Referal for further care	-		
	2022-00-18	OR SP, REFER	Referal for further care	-		
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<u>Enhanced Customization: Reordering pinned tabs/subtabs</u> 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.

IIE InContext					ANNA Female	CADENCE Nov 16, 1981				
MY PATIENT SUMMARY										
Care Team 🖡					۹. 🔹	Advisories	Average Daily MME: 0 Overlapping Opioid & Be Total Prescribers/Pharmacies: 0/0	nzos: 0 Overlapping Opioids: 0		
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LH Transitional Care Management	-	-	-	2024-11-12	-	Medications			Q ₹ 0	
Johns Hopkins Home Health - EPIC	MEDICINE 3	Carlos Smith	Primary Care	2023-10-24	-		Medication	Date Filled \downarrow	Quantity Dispensed	
						>	Morphine Sulfate ER 15 MG TBCR	2024-08-14	120	
Associated Primary Care 2	-	ABC Smith ()	Primary Care	2023-10-15	-	>	Bugrenorphine HCI-Naloxone HCI 8-2 MG FILM	2024-08-14	60	
						>	Nucynta ER 150 MG TB12	2024-06-14	60	
			Rows per page	25 + 1-3 of 3	< >	>	Buprenorphine HCI-Naloxone HCI 8-2 MG FILM	2024-07-29	60	
						>	Nucynta ER 150 MG TB12	2024-07-29	60	
						>	enyCODONE HCI 5 MG TABS	2024-07-29	60	
						>	LORappam 0.5 MG TABS	2024-07-29	10	
						>	Nucynia ER 150 MG TB12	2034-07-29	90	
						>	Nucynta ER 150 MG TB12	2024-06-26	30	
						>	Morphine Sulfate ER 15 MG TBCR	2024-06-26	120	
						>	Buprenorphine HCI-Naloxone HCI 8-2 MG FILM	2024-06-26	60	
						>	Buprenorphine HCI-Naloxone HCI 8-2 MG FILM	2024-06-06	120	
						>	traMADel HCI 59 MG TABS	2024-06-04	240	
						>	Zubsolv 8.6-2.1 MG SUBL	2024-05-21	28	

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.

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s,	2822-01-12 Non-Medicaid Health Choice GRP	Diabetes Prevention Program	Non-Medicaid Health Choice DPP				Rows per page:	25 × 1-3 ef 3	$\langle \rangle$	
	2821-12-10 ENS_CCRPR	Diabetes Prevention Program								
	2021-12-10 Frederick RP Referats	Frederick County Health Department Diabetes Prevention Program								
	2821-12-82 Solei Pharmacy	Subcutaneous/Honocional 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.

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0		MY PATIENT SUMMARY						1	Welcome to My Patient Summary	
		Care Team III Source LH Transitional Care Management Jubres Hopkins Home Health - EPHC	Care Program MEDICINE 3 ③	Provider Carlos Smith 🕐	Role Primary Care	Start Dute 🕹 2024-15-12 2023-10-24	Q Let Up 4		personalized space to centralize all essential information in one convenient location. stomcre My Patient Summary, follow these stops: stomcre My Patient Summary, follow these stops: stomcre My Patient Summary, follow these stops: stops:: Clock the pin icon ⁴ next to any autota to add if to My Patient Summary. stomcre To remove an item, click the pin icon ⁴ to the subtab name or from your view within My Patient Summary. stage and Drop: To reposition an item, click and hold the drag icon ⁴ located in the loobar of each action, then move it to on within My Patient Summary.) your deaired
•		Associated Primary Care 2	-	ABC Smith 🔘	Primary Care	2023-10-15	-	1	Start pinning the items that matter most to you and create a view tailored to your needs.	
	-				Rows per page	25 - 1.3 (/3	C >		Heat Jimite DK: 10x Hox 10x LQ JAX 440-11 HA > Bugeneorghine HC: Haldmanne HC: 8-2 MG FILM 2024-87-29 60 > my CODORD HC: 15 MG 7.892 2024-87-29 60 > my CODORD HC: 15 MG 7.885 2024-87-29 60 > my CODORD HC: 15 MG 7.885 2024-87-29 60 > LORacegam 8.5 MG 7.885 2024-87-29 60 > Naryinta ER: 150 MG 7.812 2024-87-29 60 > Maryinta ER: 150 MG 7.812 2024-87-29 60 > Maryinta ER: 150 MG 7.812 2024-87-29 60 > Maryinta ER: 150 MG 7.812 2024-86-28 120 > Maryinta ER: 151 MG 7.812 2024-86-28 120 > Bugeneorghine HCI-Nationene HCI 8-2 MG FILM 2024-86-28 60 > Bugeneorghine HCI-Nationene HCI 8-2 MG FILM 2024-86-28 60 > Bugeneorghine HCI-Nationene HCI 8-2 MG FILM 2024-86-28 60 > Bugeneorghine HCI-Nationene HCI 8-2 MG FILM 2024-86-28 60 >	



• 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.