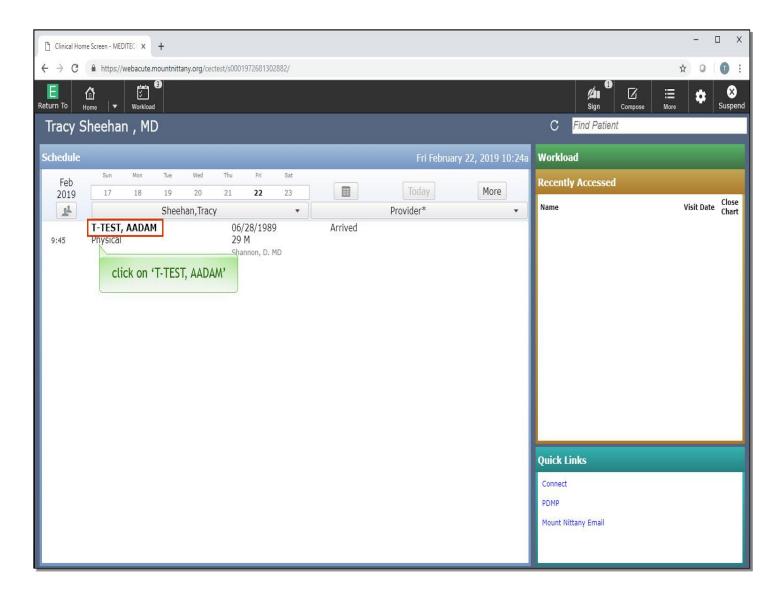


Summary Screen and Reference Region

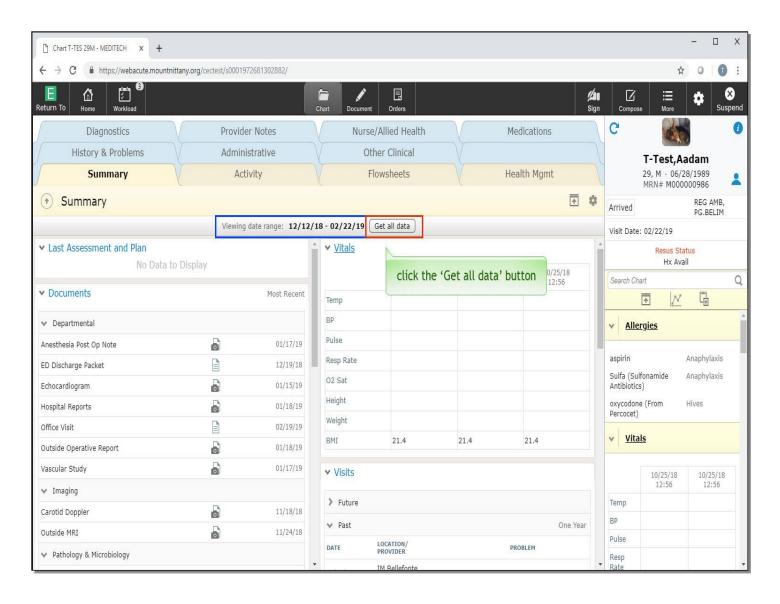
MEDITECH E X P A N S E

This course will guide you through a review of the Summary Screen and Reference Region, and will demonstrate how to customize your widget layout.

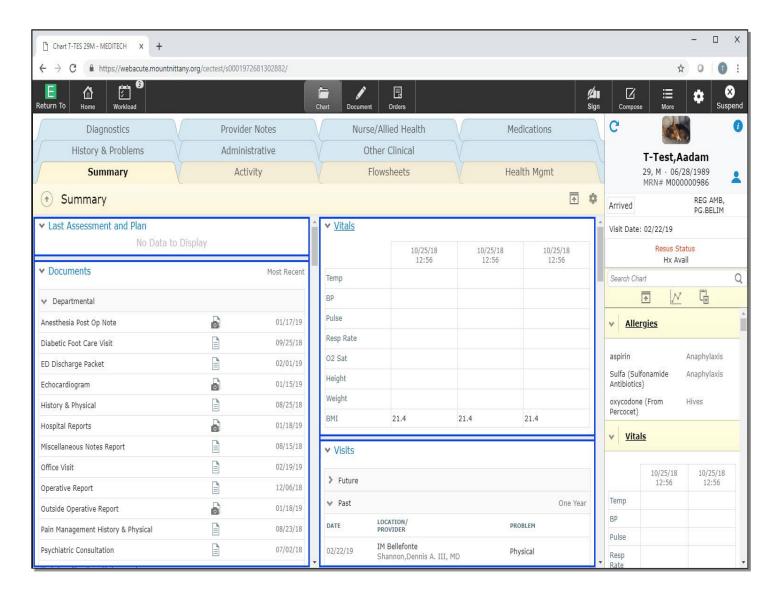
Subtle on screen elements of the LIVE system may vary from what is shown within this course; however, the functionality is as shown.



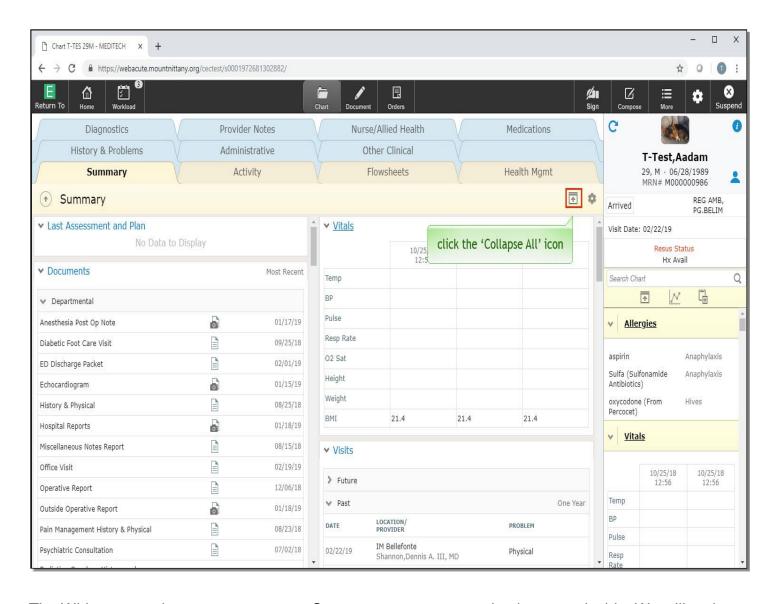
You will begin the lesson on the Clinical Home Screen. The most efficient way to open a patient's chart is clicking directly on the patient's name in your schedule. Select 'T-TEST, AADAM' to enter the patient's chart.



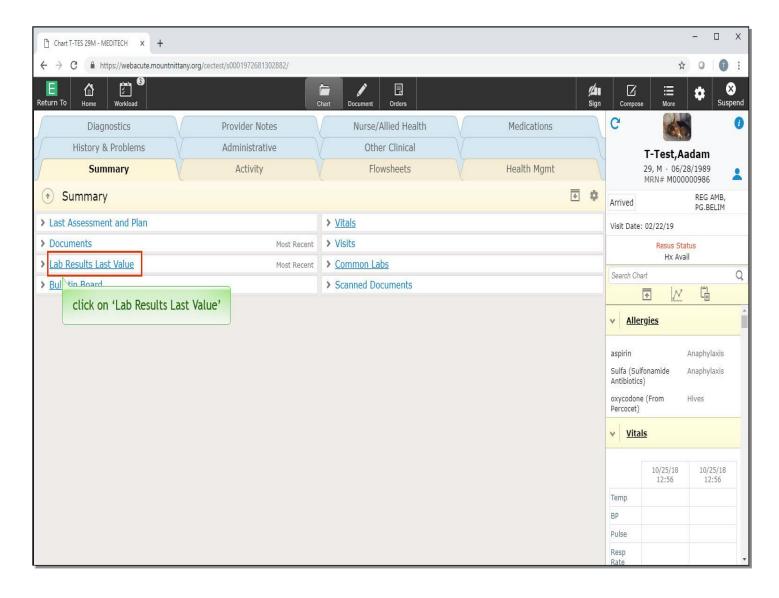
Upon entering the chart, you are presented with the Summary Screen. You'll notice at the top there is a bar that shows the Date Range you are viewing information from. If you need to see older information, click the 'Get all data' button.



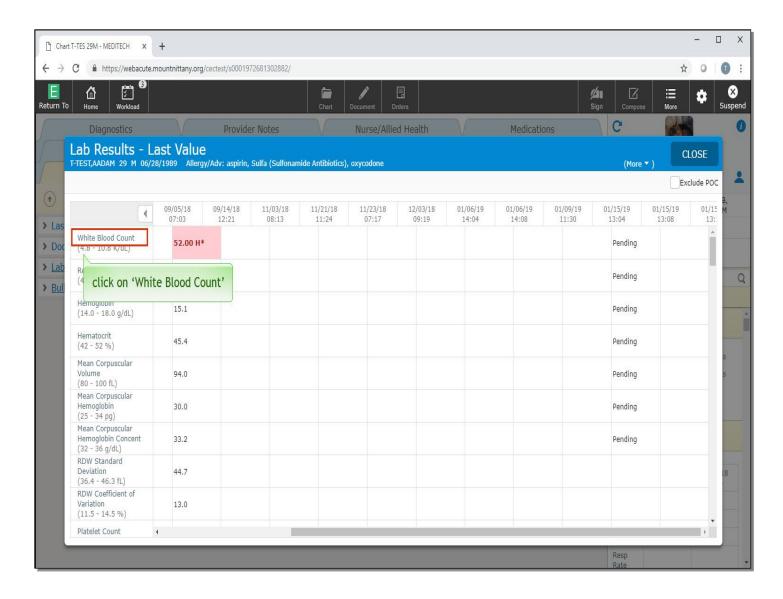
It may take a moment for the screen to load, depending on the volume of data associated with the patient. Once the screen is loaded, you will notice the Summary page is set up into two columns with different sections within each column. These sections are referred to as Widgets, and are designed to pull the most pertinent information to the 'front page' of the chart.



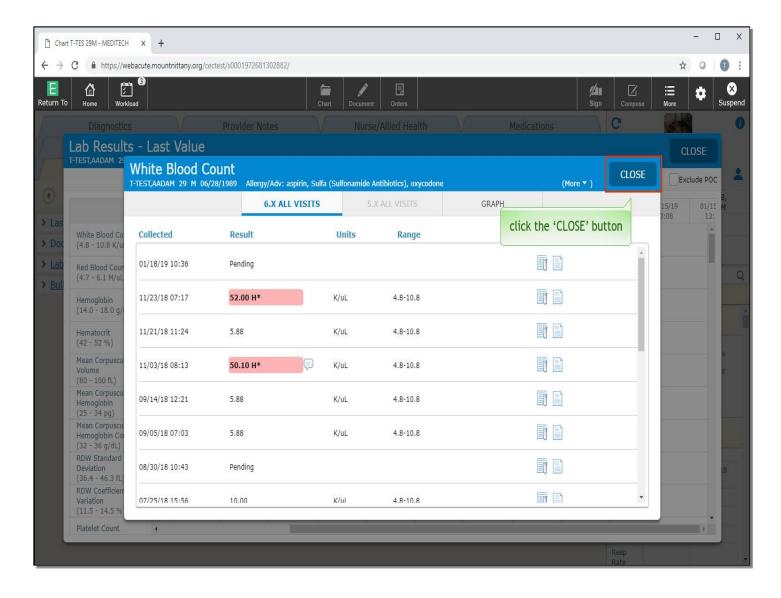
The Widgets you choose to put on your Summary page are completely customizable. We will review how to customize these later in this lesson. To quickly view all Widgets on your Summary Panel, you can collapse the sections by selecting the 'Collapse All' icon, located on the left of the gear icon. Please note that this same icon can be selected when the sections are collapsed and you want to expand them. Now, click the 'Collapse All' button.



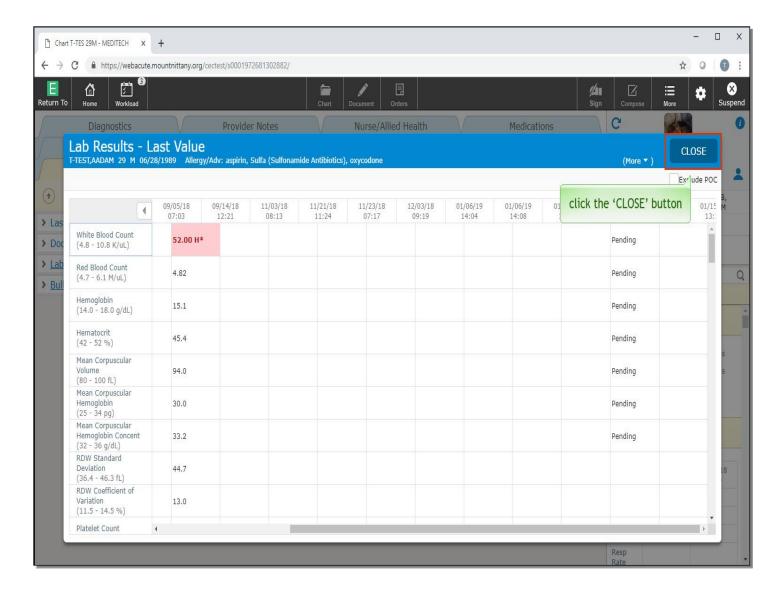
This collapses all the Widget content, leaving just the Widget names. An underlined name is a link that when clicked, will take you into an overlay view of that information. In the left column, click on the Widget name 'Lab Results Last Value'.



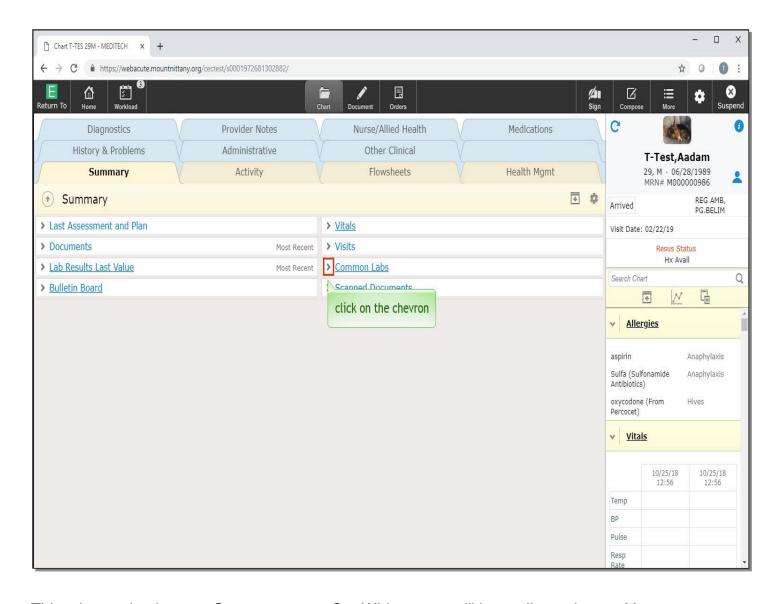
This brings you into the Overlay where you can view previous Lab Values to trend, or compare them to the current Lab Values. For example, let's look at a trend of the 'white blood cell count' by clicking on the laboratory name on the left side.



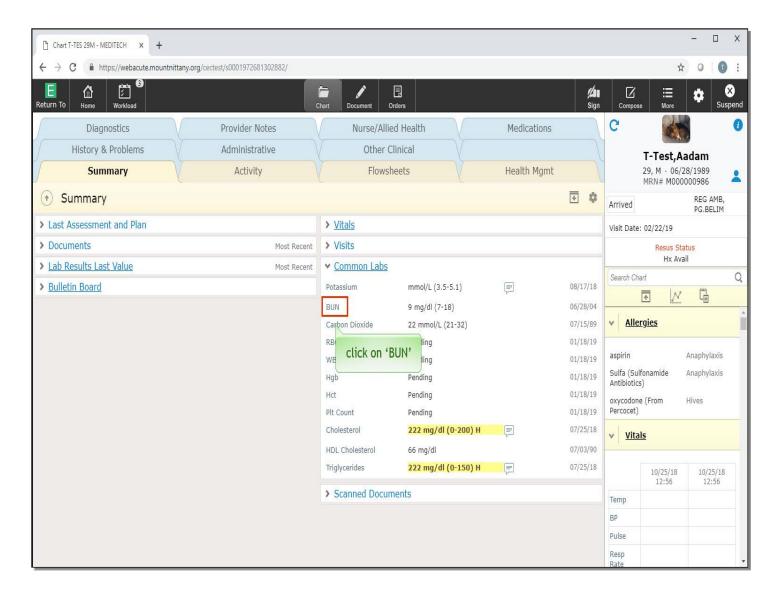
Once you are finished reviewing the results, click the 'Close' button.



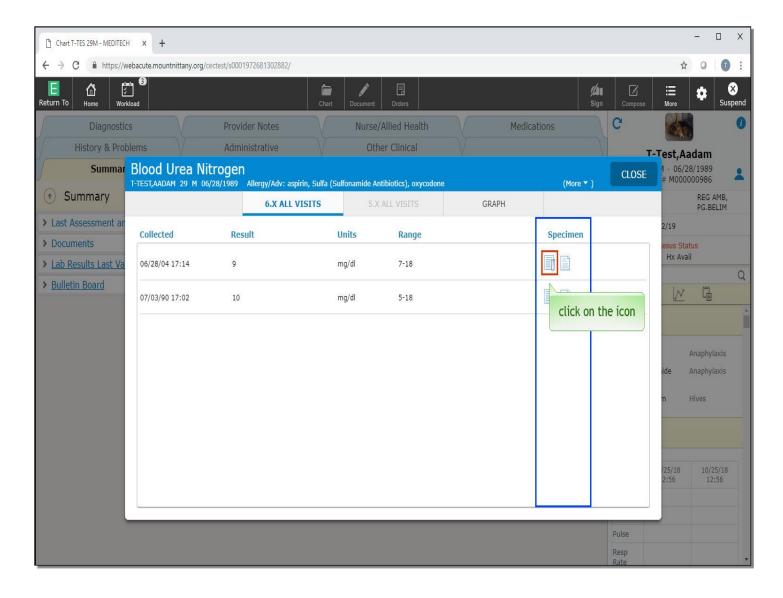
To return to our Summary page, click the 'Close' button.



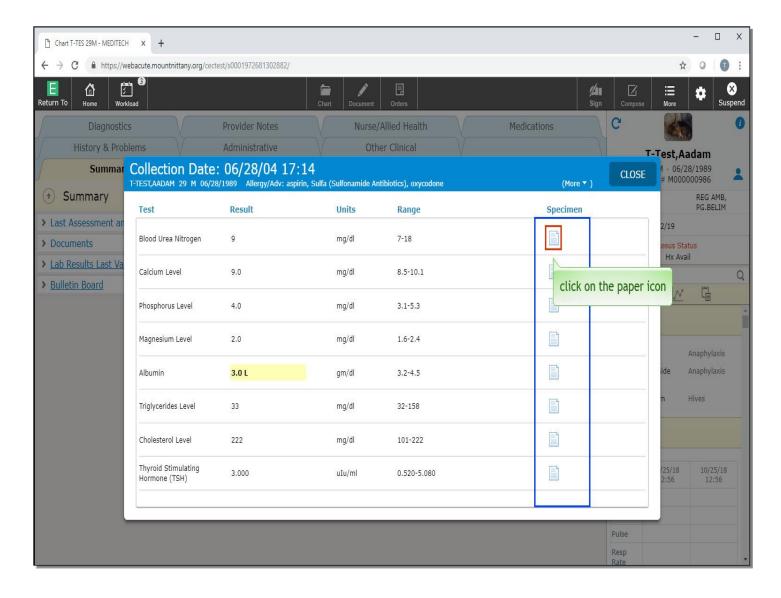
This takes us back to our Summary page. Our Widgets are still in a collapsed state. You can open up an individual Widget by clicking on the chevron next to the Widget name. Click on the chevron to the left of 'Common Labs'.



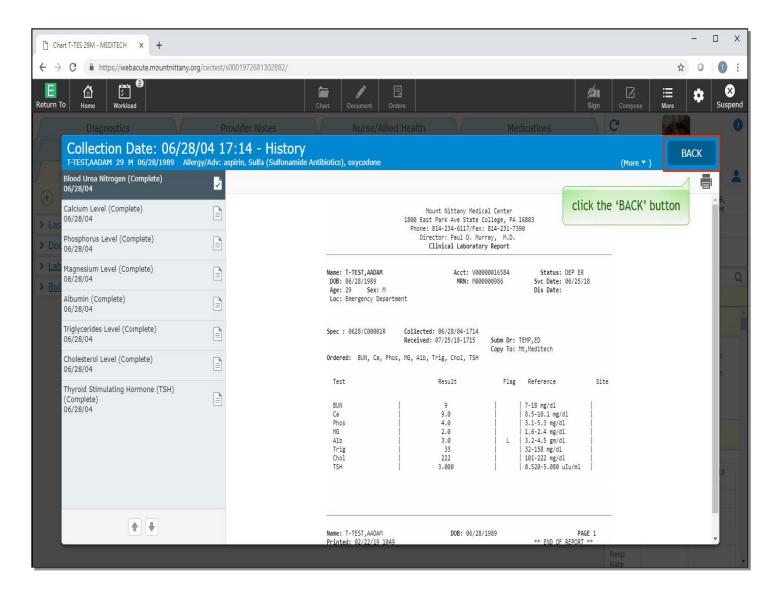
Notice that you can also click on an individual Lab Value if you want to see the previous information for that specific test. Click on 'BUN'.



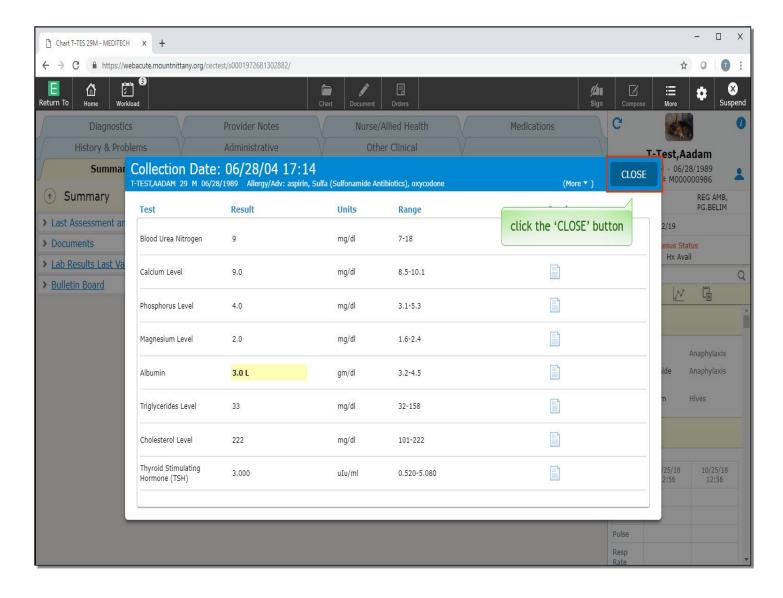
This brings up all BUN values on this patient. The icons in the Specimen column can provide further information. Clicking on the icon with the 'test tube' will show you other values obtained during the same Lab draw. Click on this now.



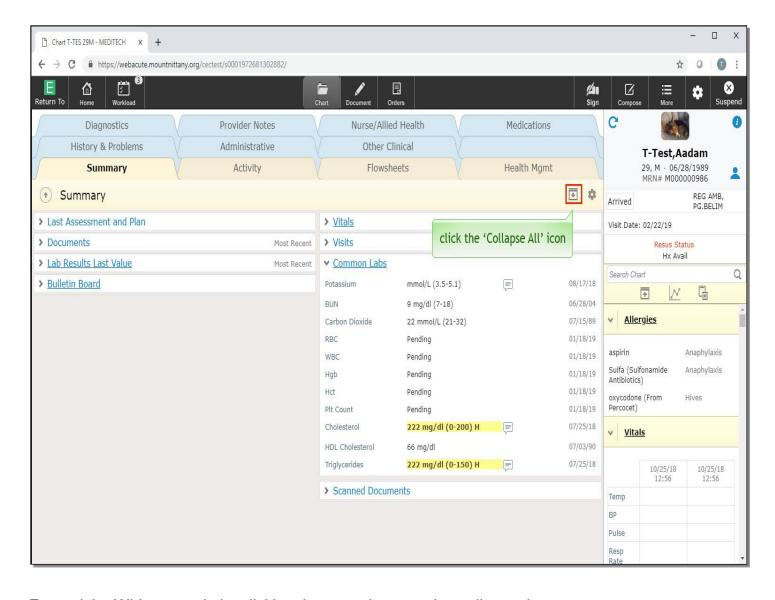
Clicking on the 'paper' icon under the specimen (shown here or on the previous screen) will show you a more traditional view of the Lab results. Now, click on the 'paper' icon.



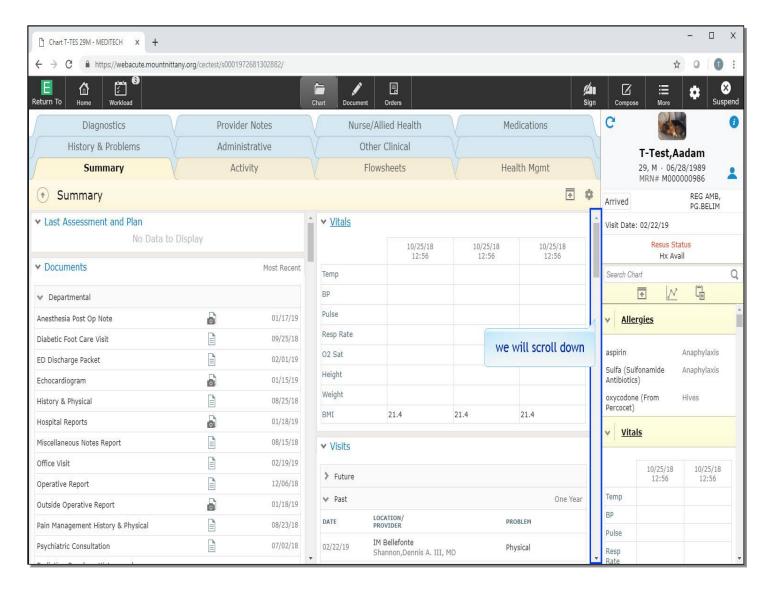
Once you are finished reviewing this screen, click the 'Back' button.



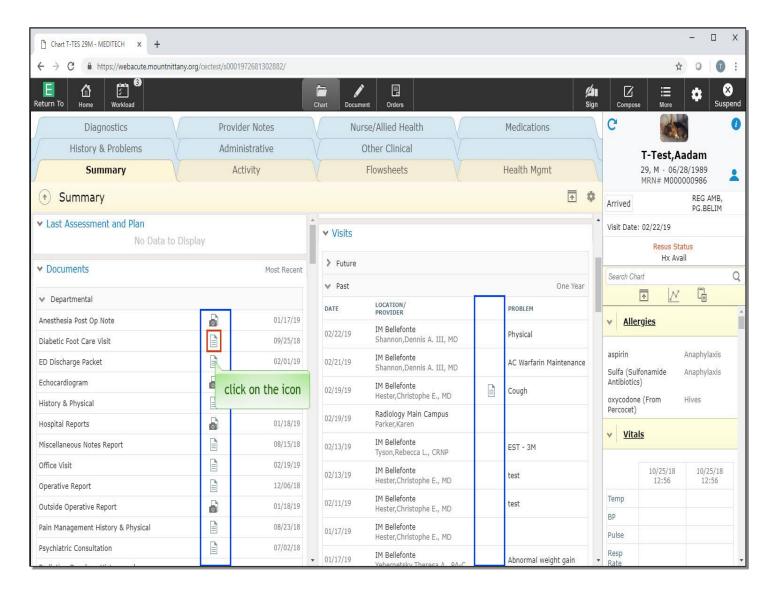
To return to the 'Summary' screen, click the 'Close' button.



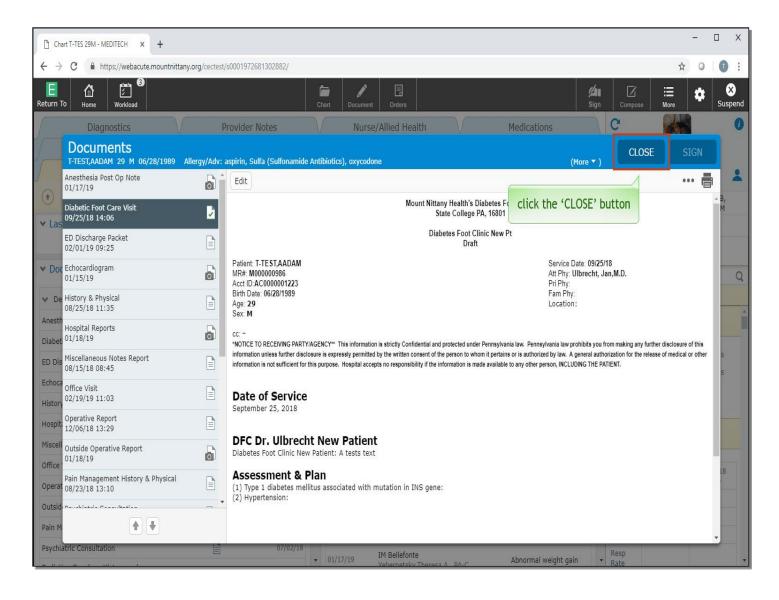
Expand the Widgets again by clicking the same icon used to collapse them.



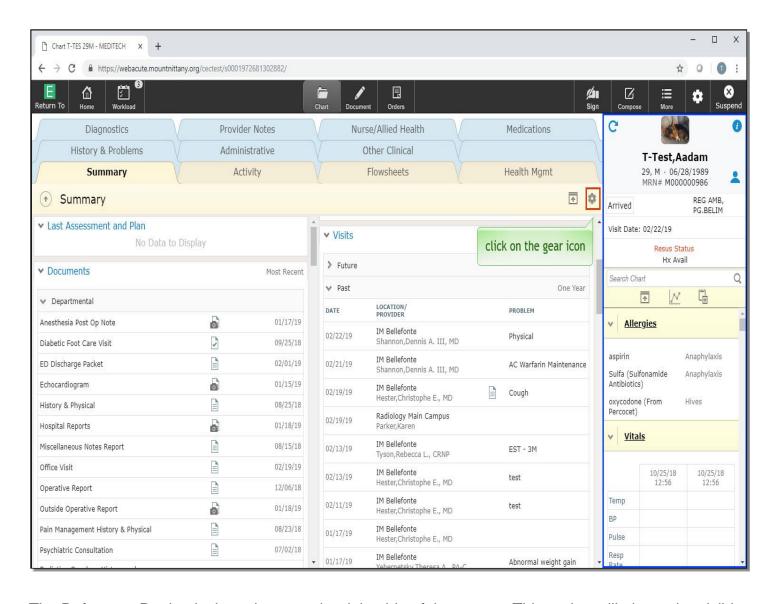
We will scroll down for you, showing that each column of Widgets can be moved independently.



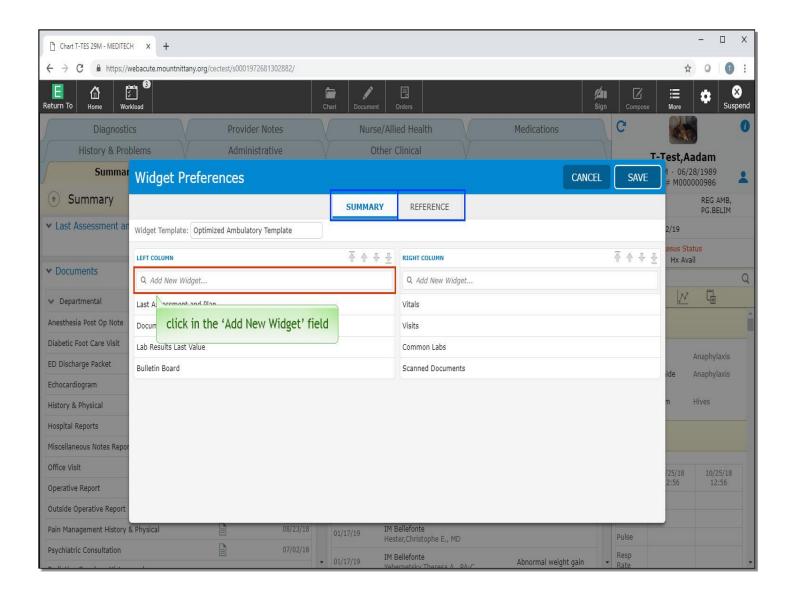
You'll notice the Documents Widget and the Visits Widget both have 'paper' icons or 'picture' icons associated with the document name or visit, respectively. Clicking on these icons will allow you to view the Document from an overlay. Click on the icon next to the 'Diabetic Foot Care' visit.



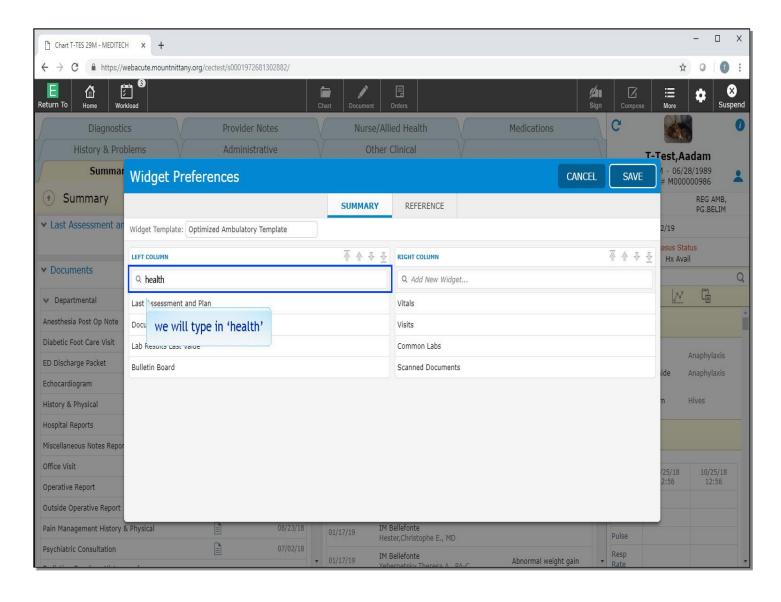
From this Overlay, you can navigate to other documents by clicking on the document in the column on the left, while you can view the document on the right. When you are finished viewing the documents, click the 'Close' button.



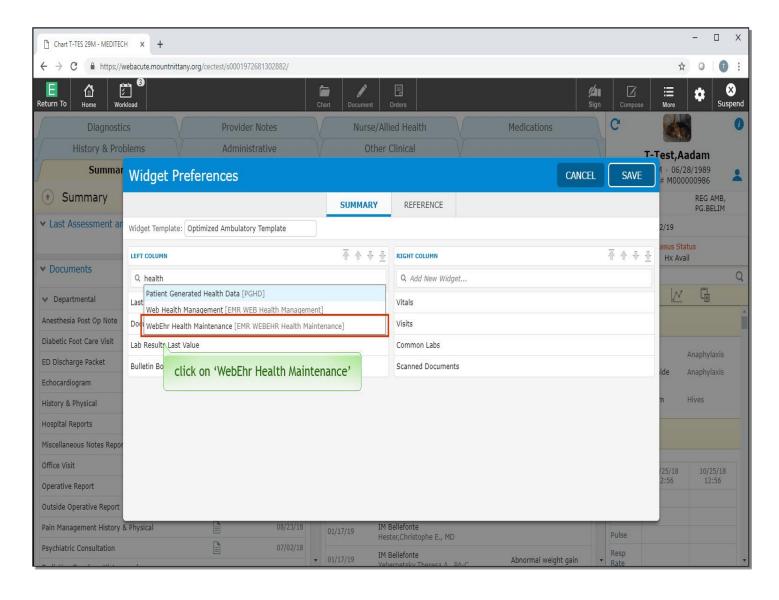
The Reference Region is the column on the right side of the screen. This region will always be visible, regardless of where you are in the patient's chart. The sections within the Reference Region are Widgets as well, and can also be customized to display the Widgets of your choice. Let's now look at how you can customize your Widget layout for the Summary tab and the Reference panel. To customize these Widgets, click on the 'gear' icon in the header area of the Summary page.



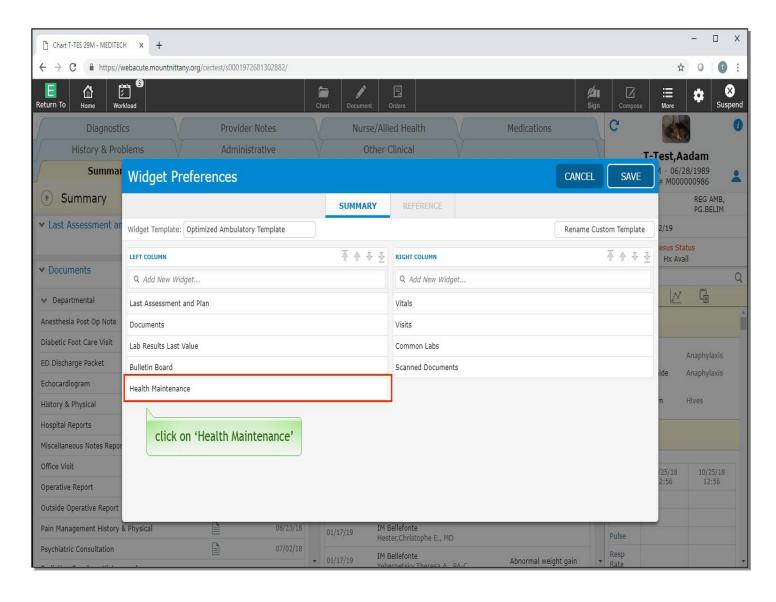
The Widget Preferences Overlay appears. Here you have the ability to customize the Summary section, which is on the left, or the Reference area, which is on the right. Beginning with the Summary tab, note the option to add Widgets to either column. Let's add a Health Maintenance Widget to our Summary page, click in the 'Add New Widget' field on the left side.



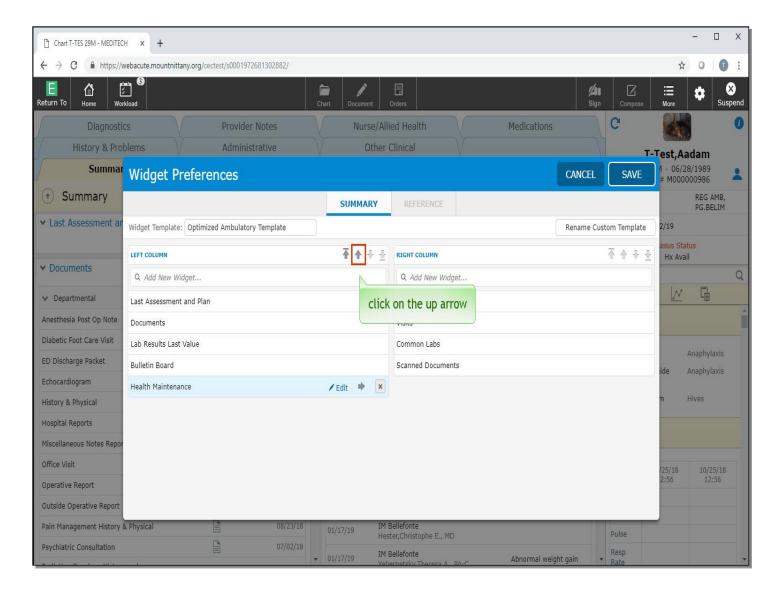
In the 'Search' field we will type in 'health' for you.



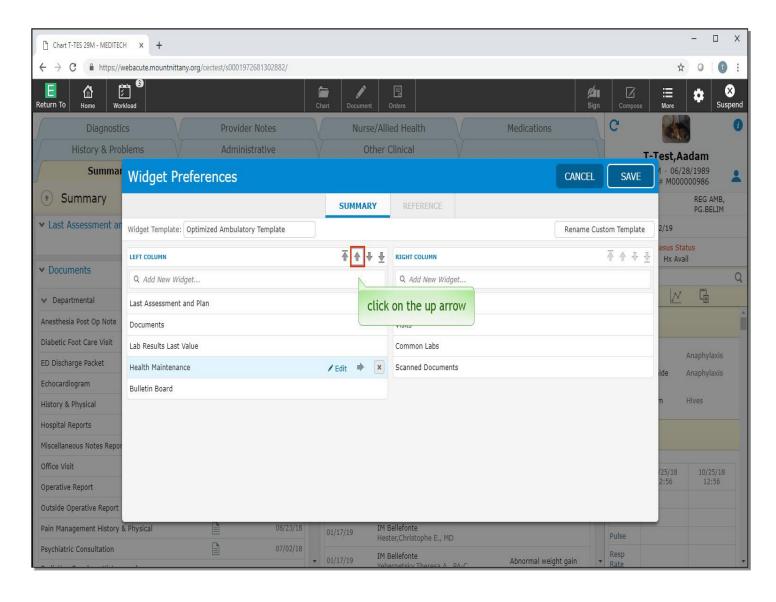
Click on the 'WebEhr Health Maintenance' Widget title to add it to the left column of the Summary page.



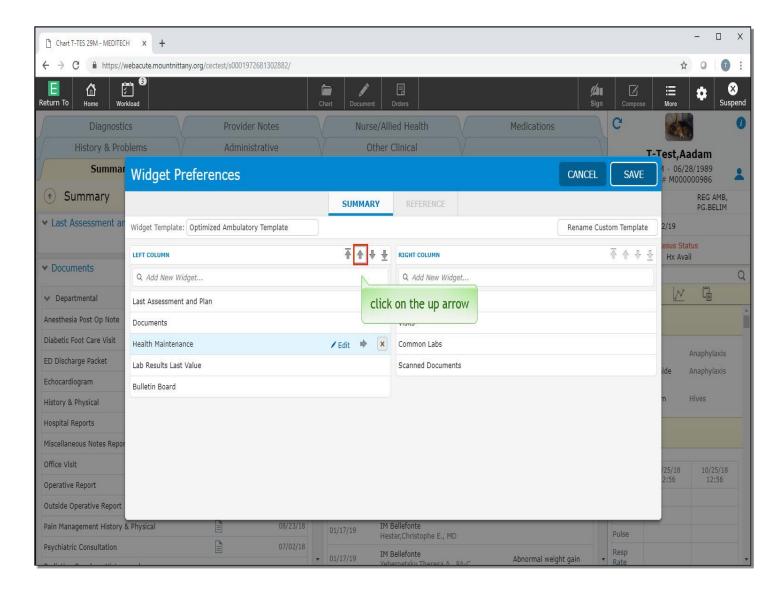
You can also rearrange the order of the Widgets. To do so, click on the newly added 'Health Maintenance' Widget title.



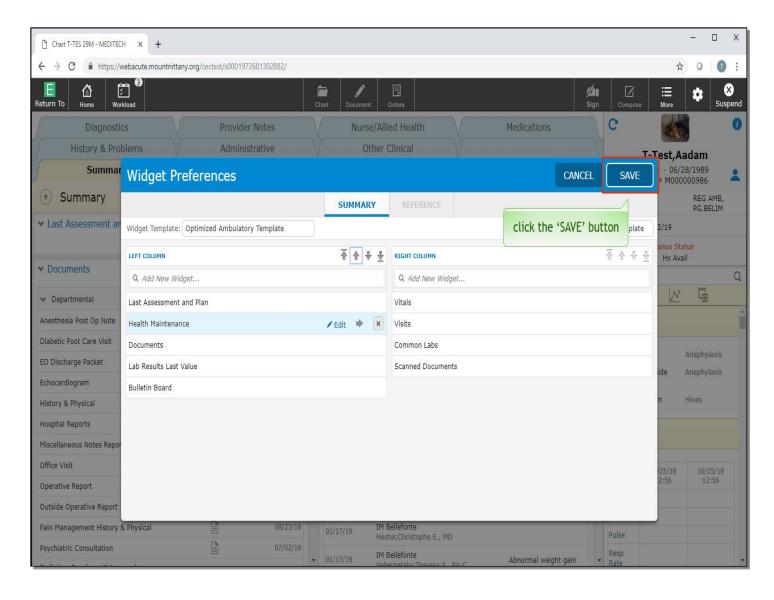
This highlights the Widget. Note that using these buttons you can edit this Widget. Move it to the right column or remove it from your layout altogether. For now we wish to move this Widget to a new position under the Last Assessment and Plan. Click on the 'up arrow' to move it up.



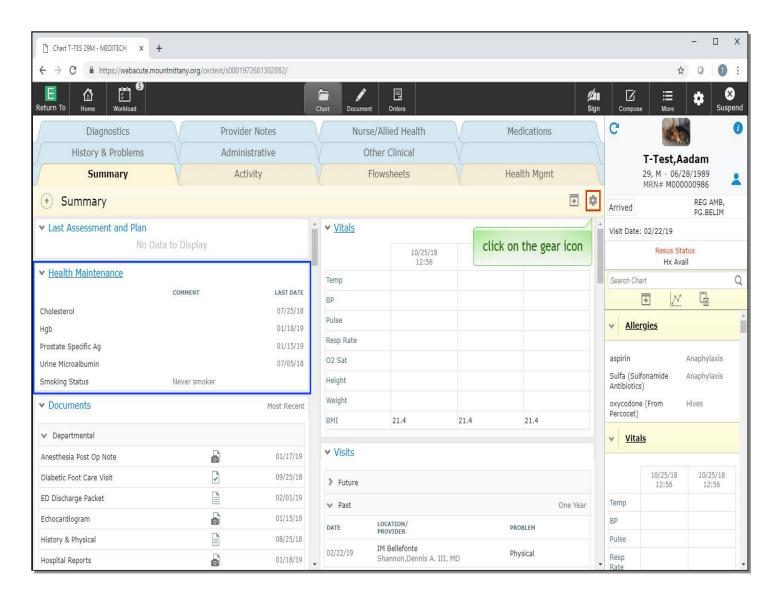
Using the up and down arrows is an easy way to rearrange the order in which the Widgets will appear so you can customize your Summary page. Click on the 'up arrow' again.



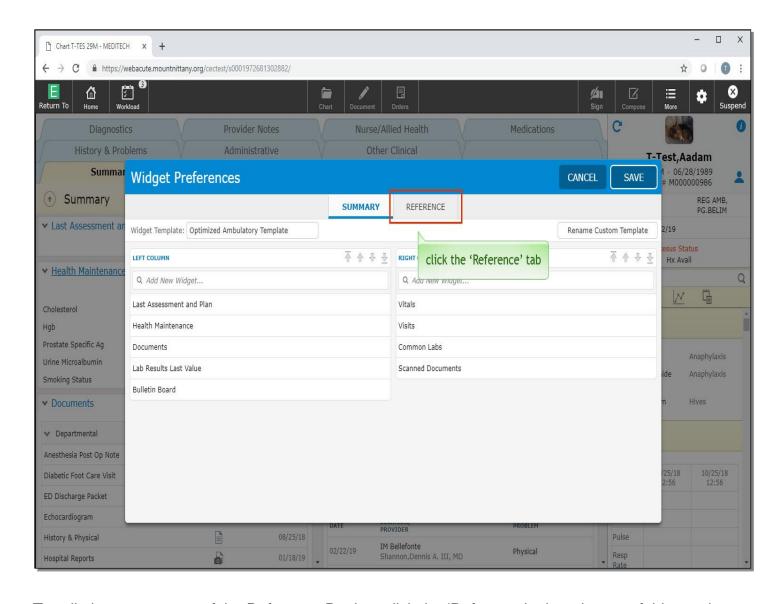
Click on the 'up arrow' one more time.



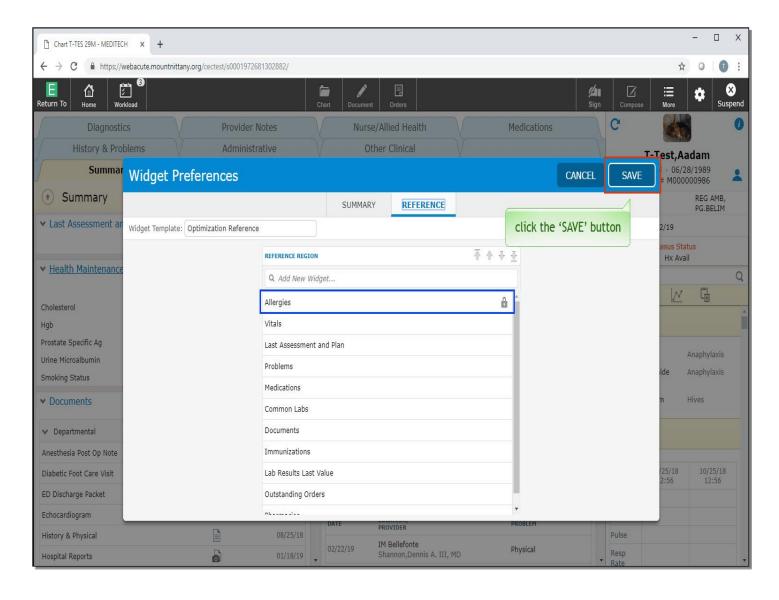
Click the 'SAVE' button.



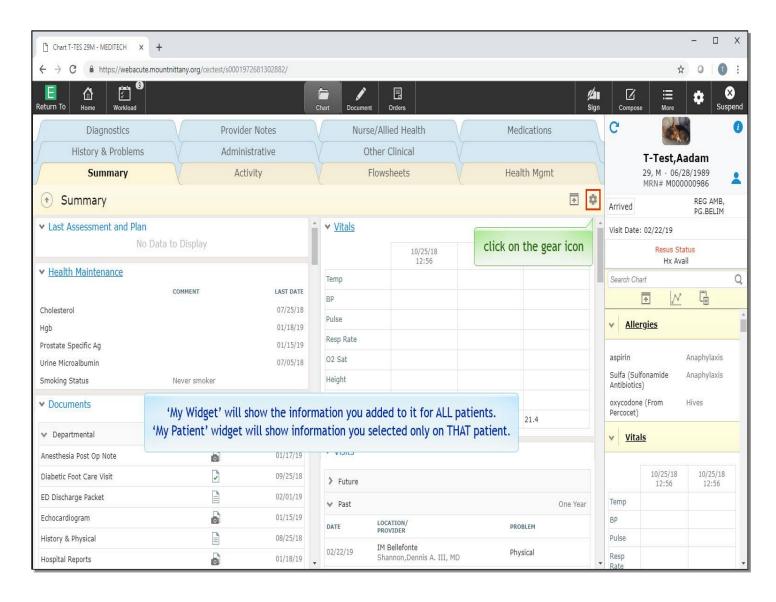
Note the Widget is now present under the Last Assessment and Plan as we intended. You can also add or rearrange Widgets in the Reference Region. To open the Widget Layout Overlay, click the 'gear' icon again.



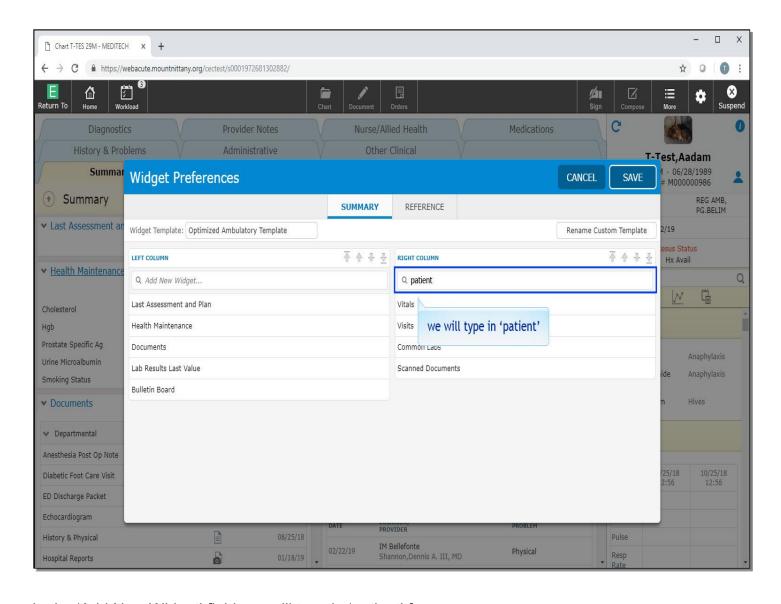
To edit the appearance of the Reference Region, click the 'Reference' tab at the top of this overlay.



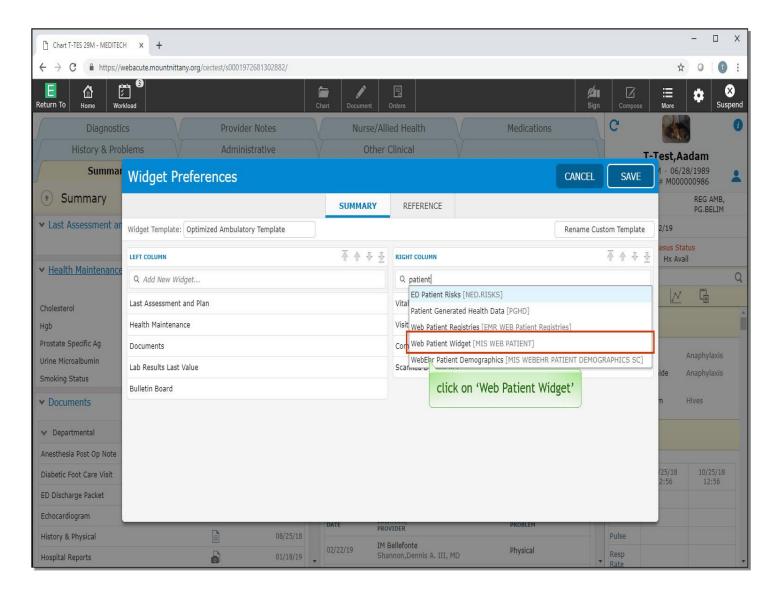
You'll notice the Allergies Widget has a 'padlock' to the right of it. This widget is locked and cannot be moved or removed from the Reference Region. The remainder of the Widget Layout for the Reference Region can be edited as we did for the Summary tab. For now, click the 'SAVE' button.



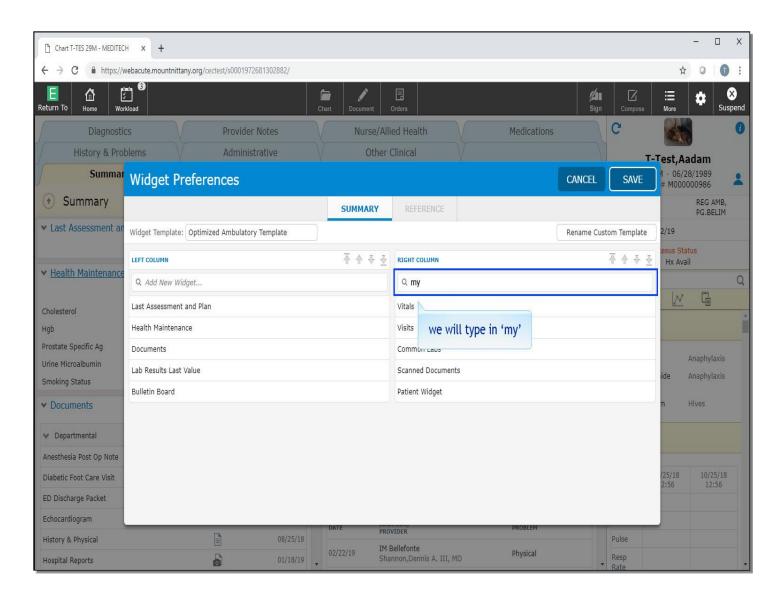
The 'My Widget' and 'My Patient' Widgets can be customized according to what you would like to see on these Widgets. 'My Widget' will show the information you added to it for all patients. 'My Patient' Widget will show information you selected only on that patient. Let's quickly add these to the layout so we can learn how to take advantage of them. Click on the 'gear' icon.



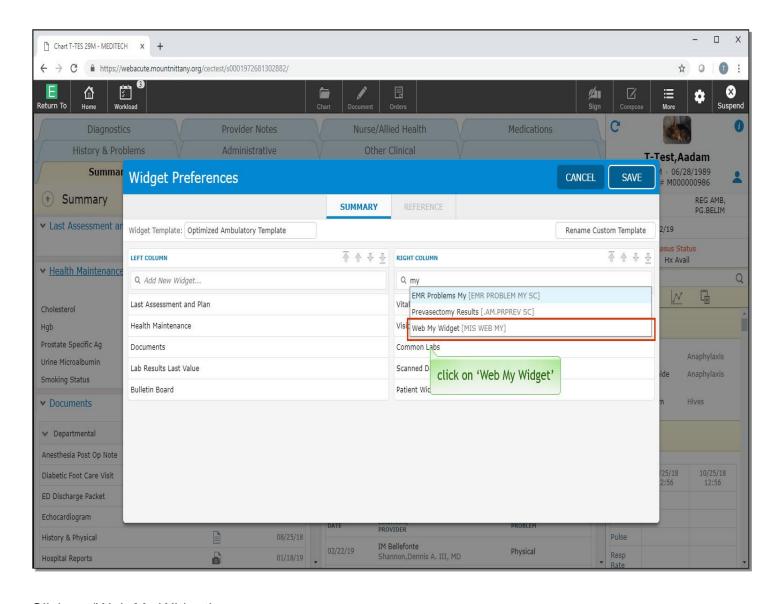
In the 'Add New Widget' field, we will type in 'patient' for you.



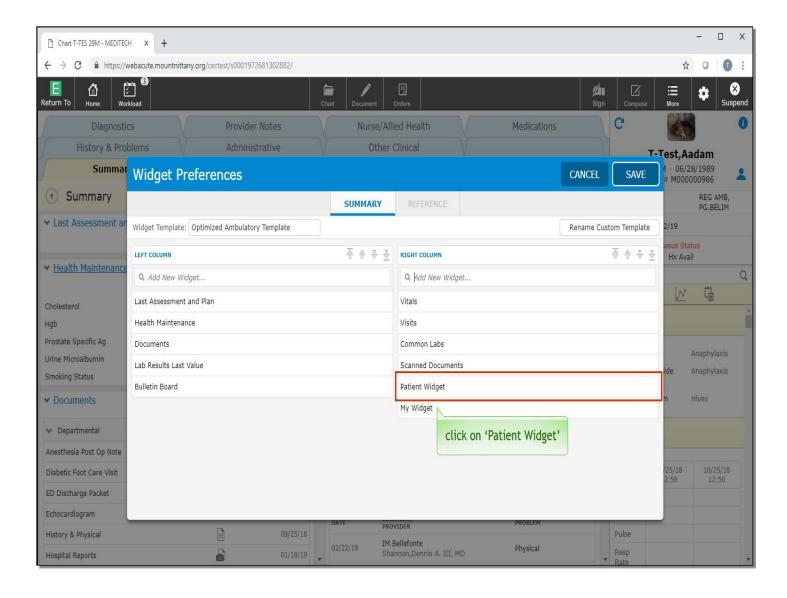
Click on 'Web Patient Widget'.



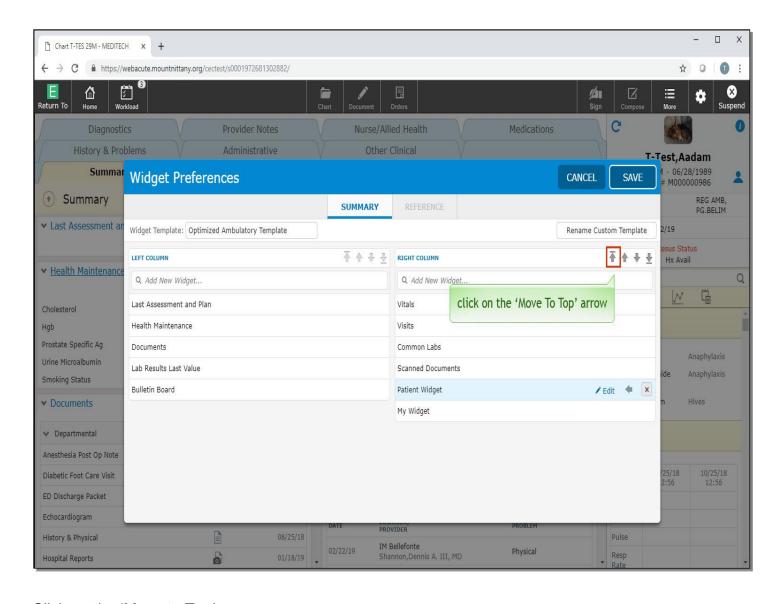
Now we will type in 'my'.



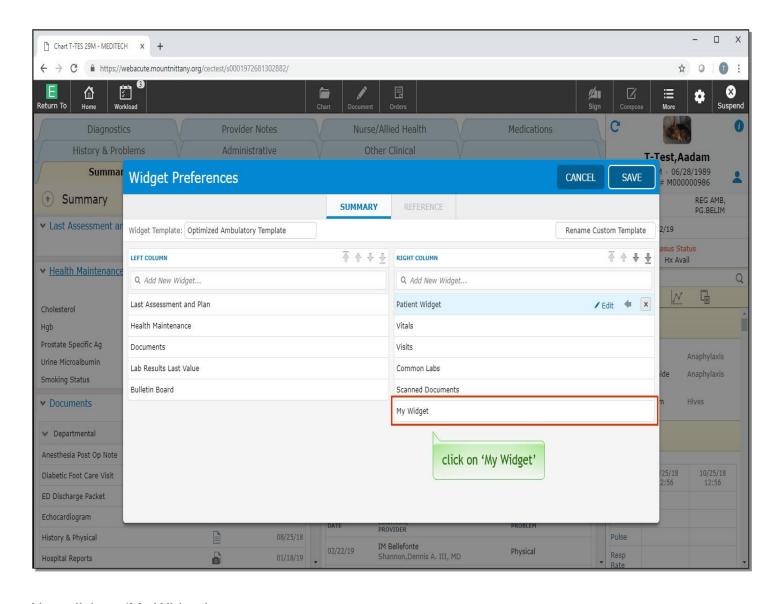
Click on 'Web My Widget'.



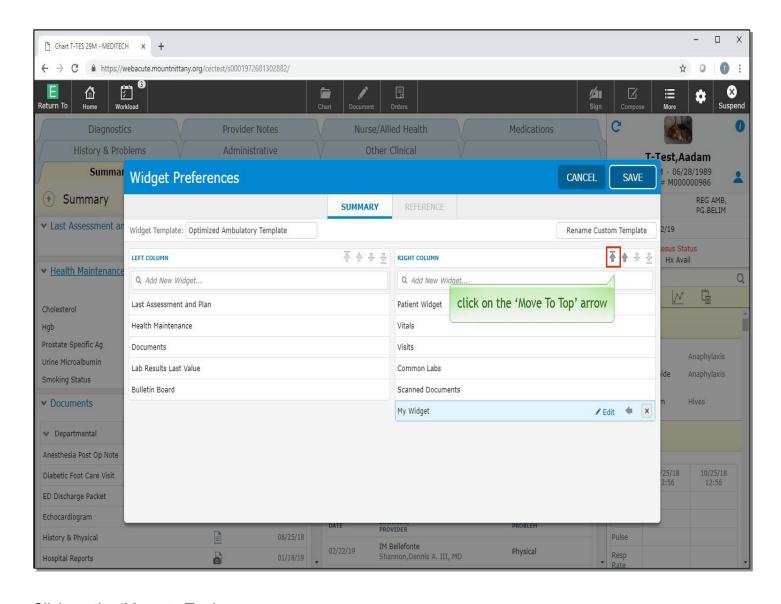
Let's move them to the top of this column, click on 'Patient Widget'.



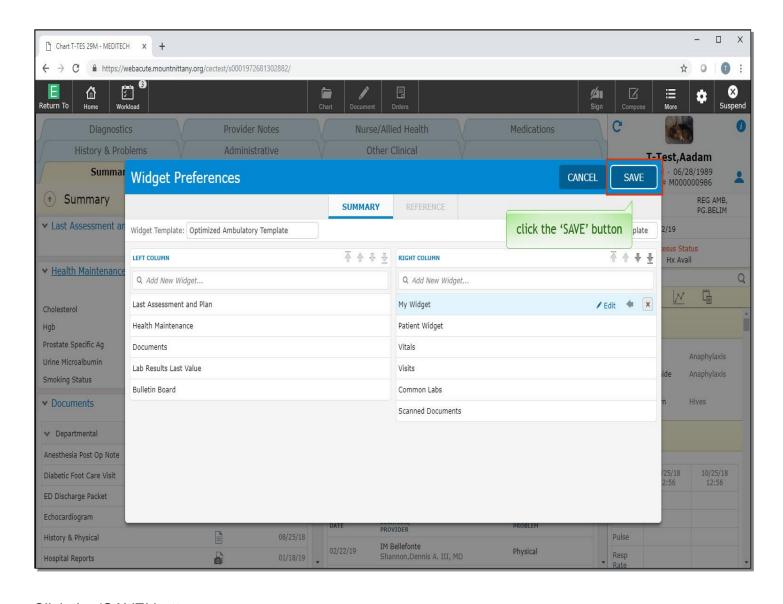
Click on the 'Move to Top' arrow.



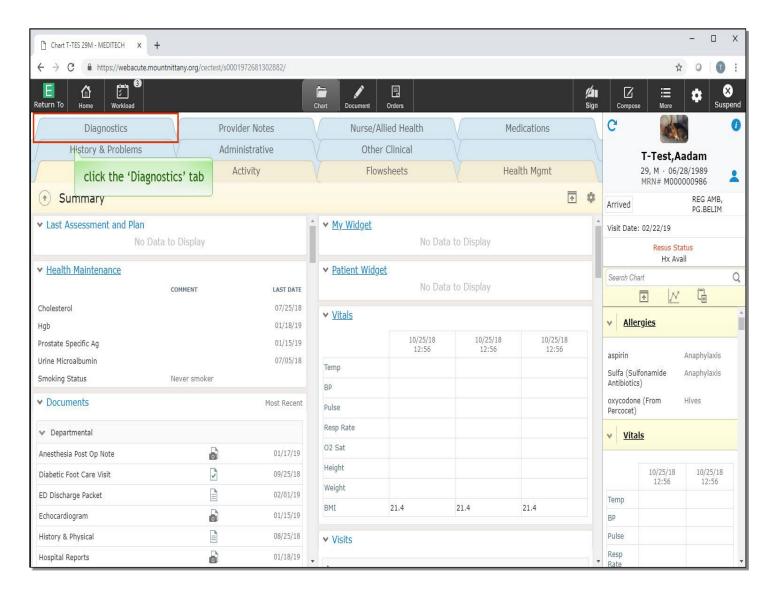
Now click on 'My Widget'.



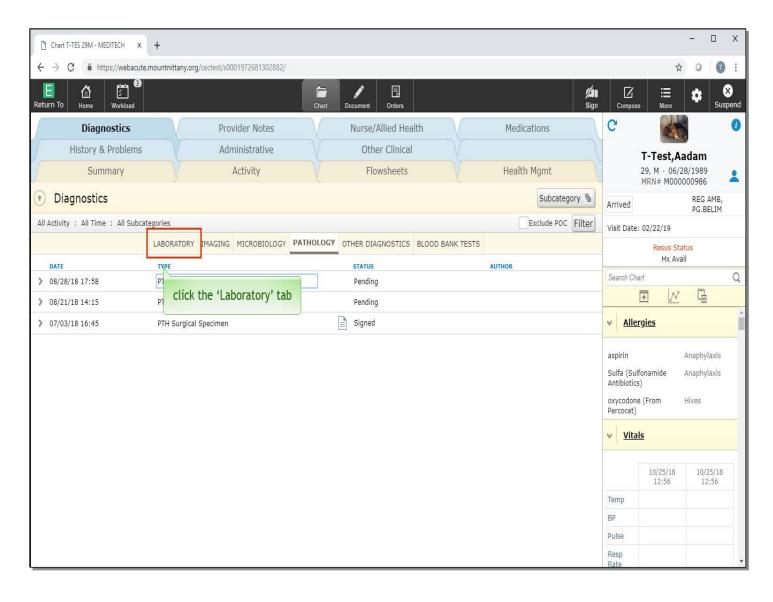
Click on the 'Move to Top' arrow.



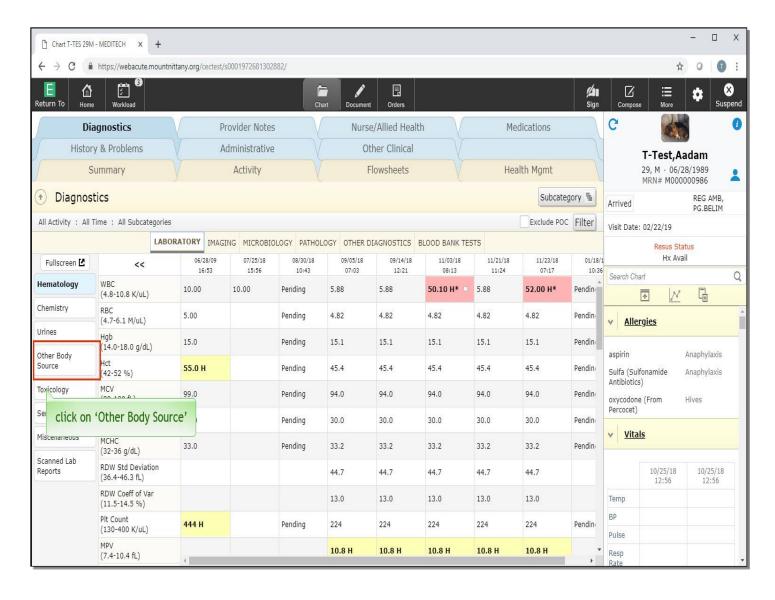
Click the 'SAVE' button.



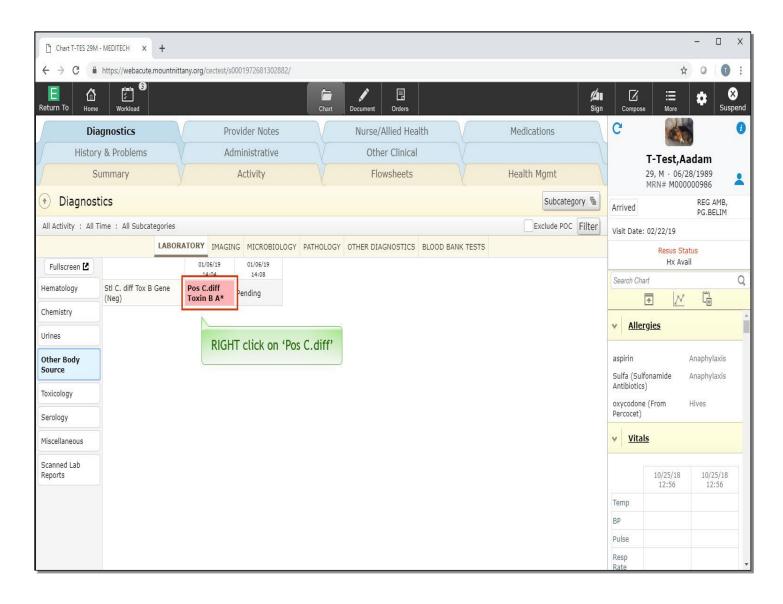
To add information to either of these Widgets, you must navigate to the area of the chart where that information is found. Click the 'Diagnostics' tab,



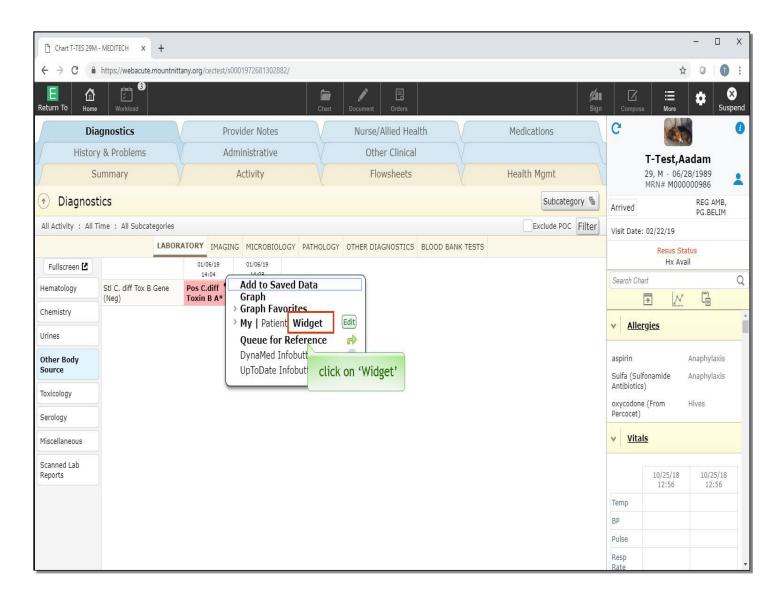
Click the 'Laboratory' tab.



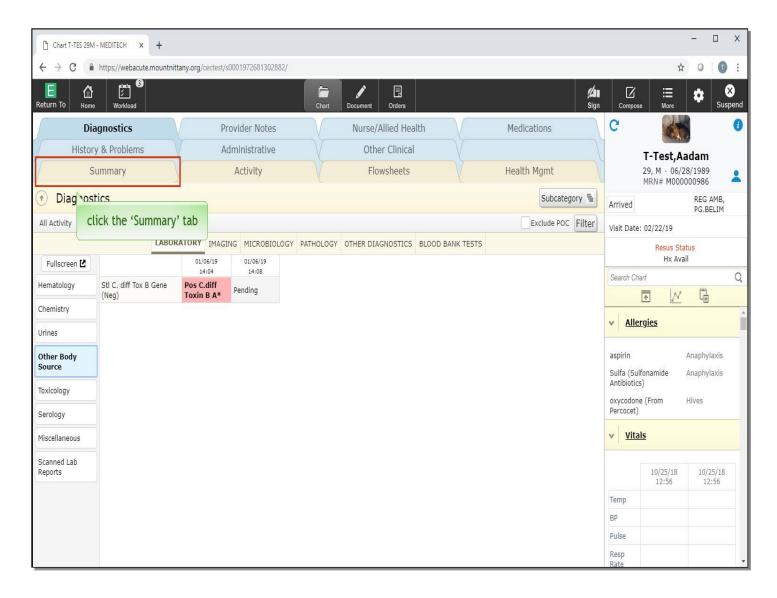
Click on 'Other Body Source'.



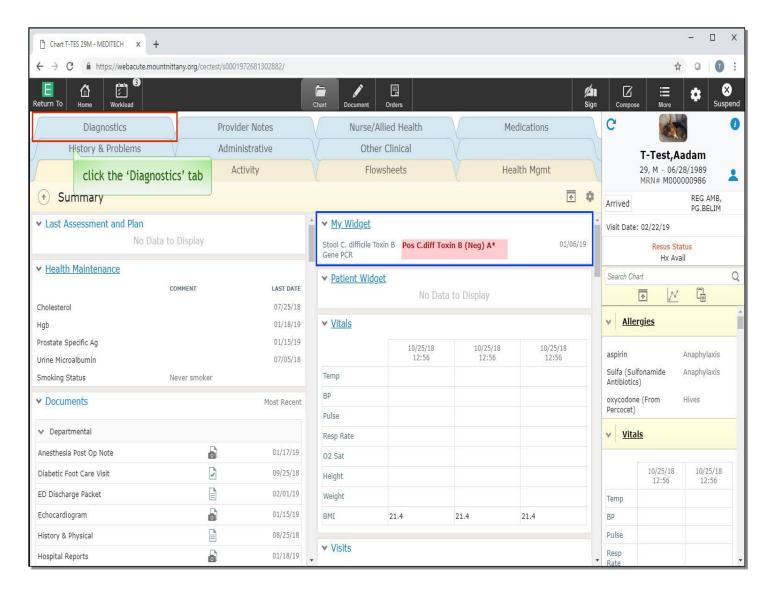
RIGHT click on 'Pos C.Diff'.



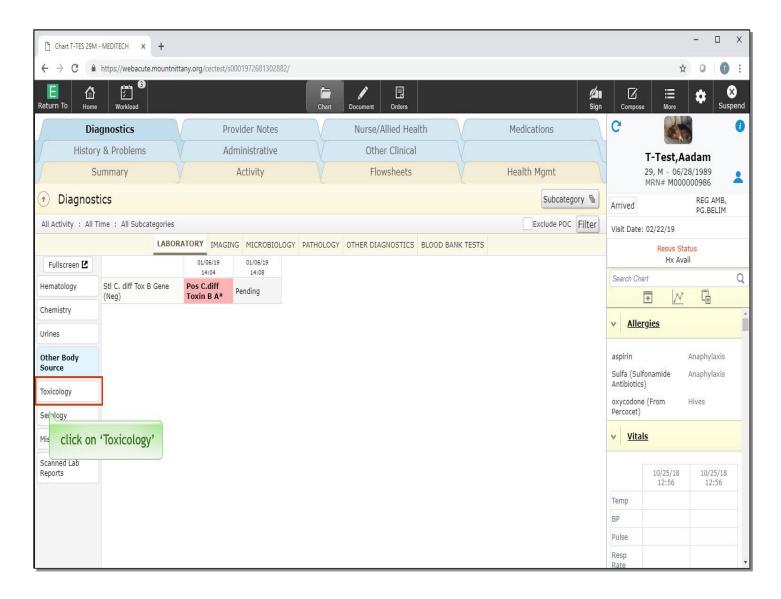
This brings up a menu. Note the words 'My' and 'Widget' are in bold. To add this to 'My Widget', click on the word 'Widget'.



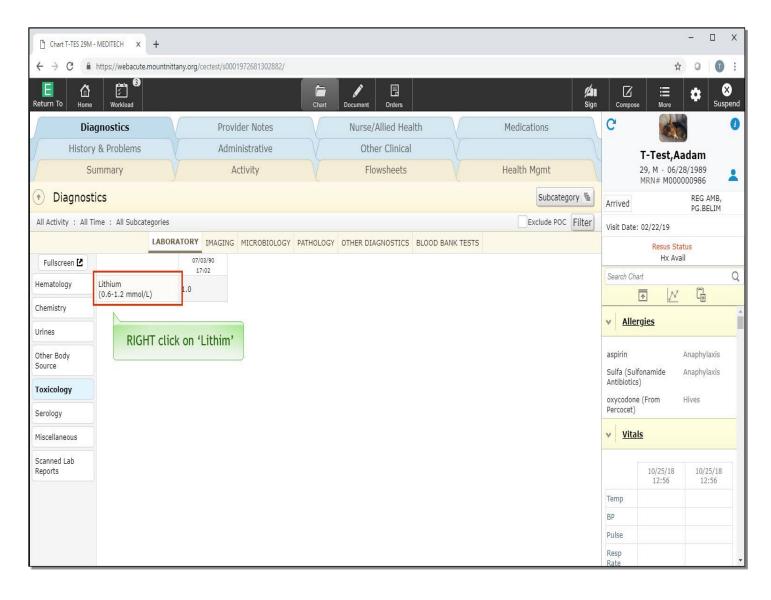
Now, to see the results, click the 'Summary' tab.



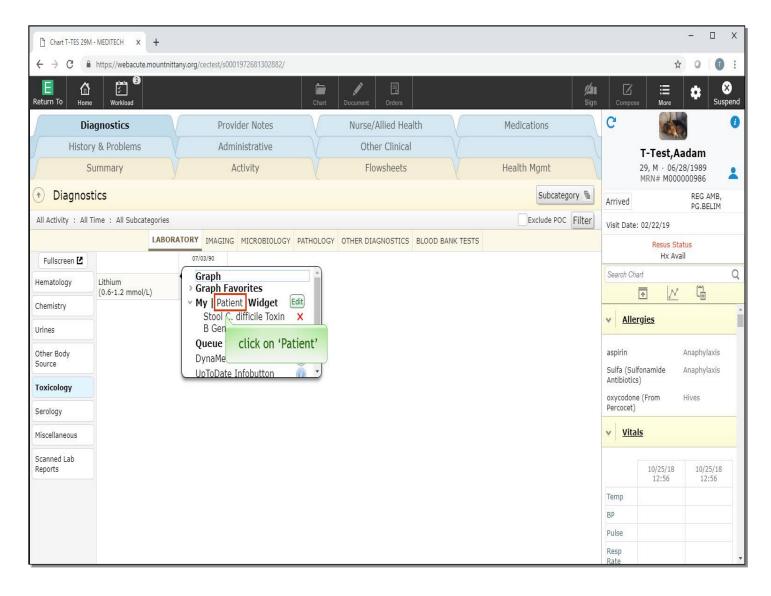
Stool C. Difficile will display the most recent results for all patients that have had this test. In this patient example we wish to keep track of their Lithium level. Let's add that to the patient Widget. Begin by clicking the 'Diagnostics' tab.



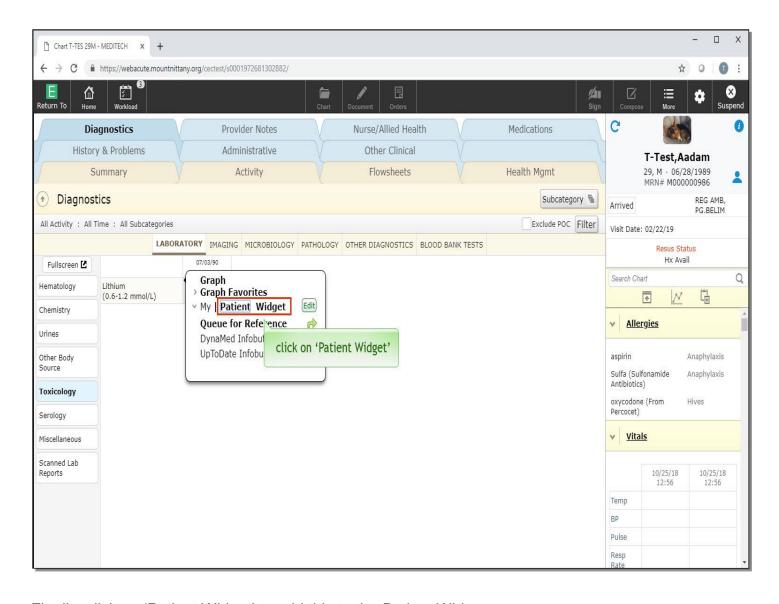
Click on 'Toxicology'.



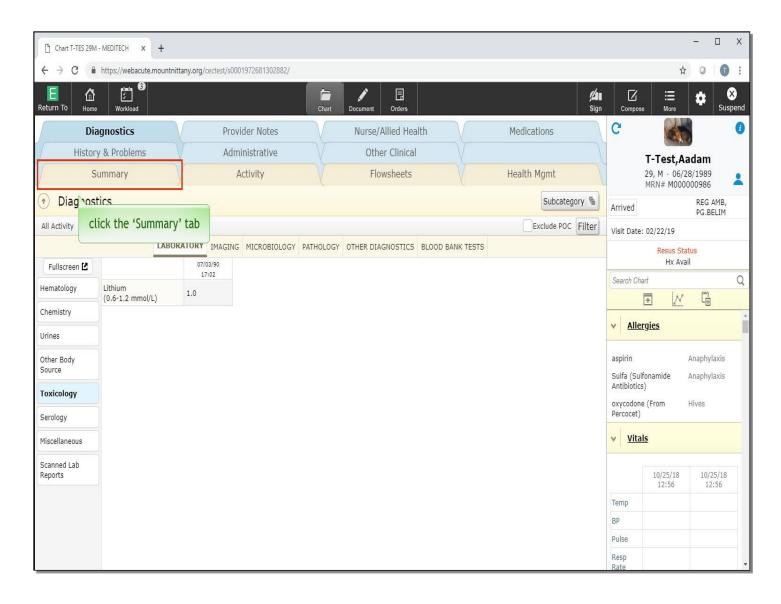
RIGHT click on the word 'Lithium'.



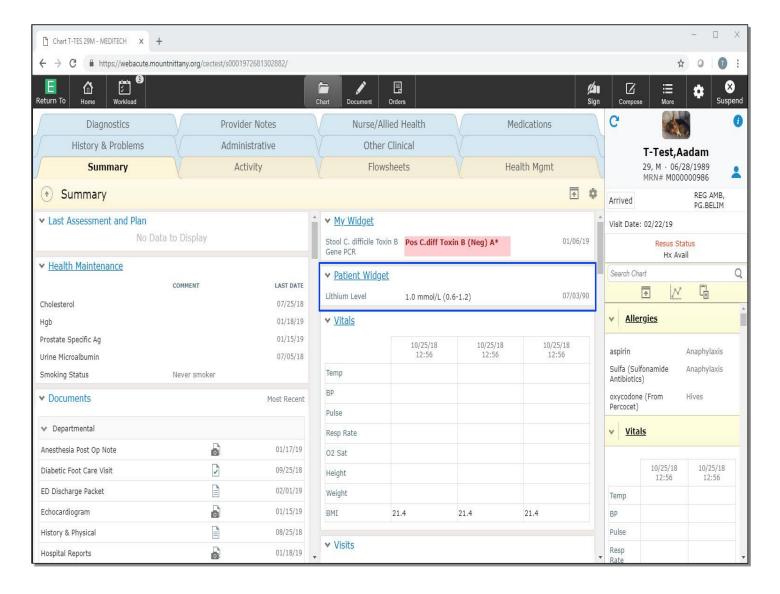
Since we only want to follow this value for this patient, click on the word 'Patient' to make it bold.



Finally, click on 'Patient Widget' to add this to the Patient Widget.



Again let's view the Summary tab to see the result. Click the 'Summary' tab.



Note that this Widget will only show the Lithium level for this patient.

This concludes our lesson on Summary Screen Widgets.

In this lesson, we've demonstrated how to:

- Obtain all data for the patient's Summary page
- Review more information from Widgets
- Customize the Summary Panel and Reference Region Layout.
- Use 'My Patient Widget' and 'My Widget'

MEDITECH best practice guidelines have been integrated into this lesson.

Please refer to your facility-specific workflows for process questions not covered in this course.