# Customizing CHR Dashboard and Summary Views to Maximize User Efficiency

## TELUS Collaborative Health Record

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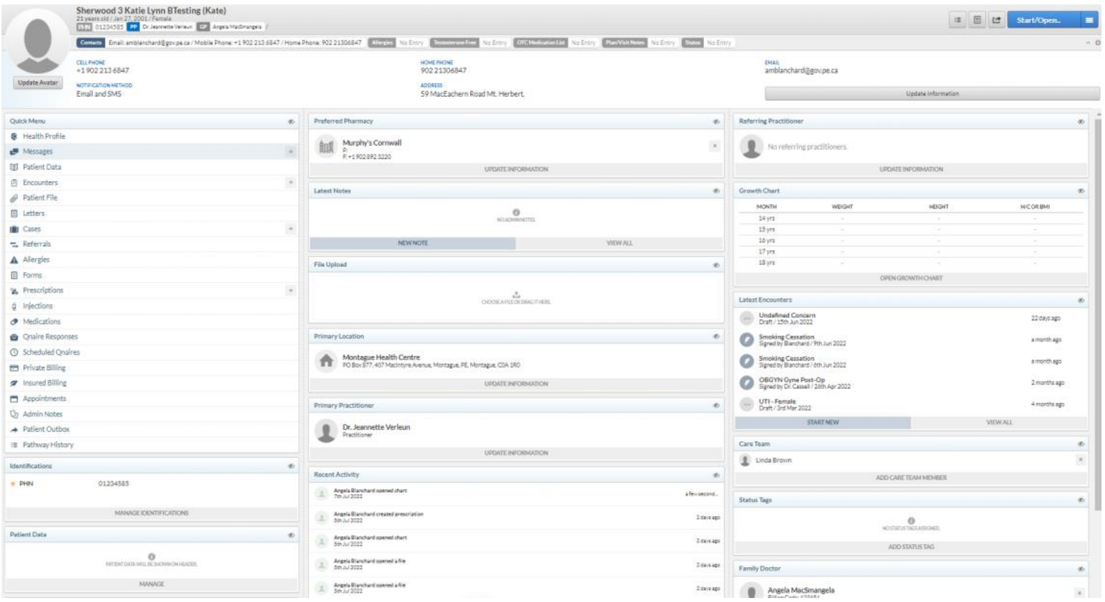
# Customizing CHR Dashboard and Summary Views to Maximize User Efficiency

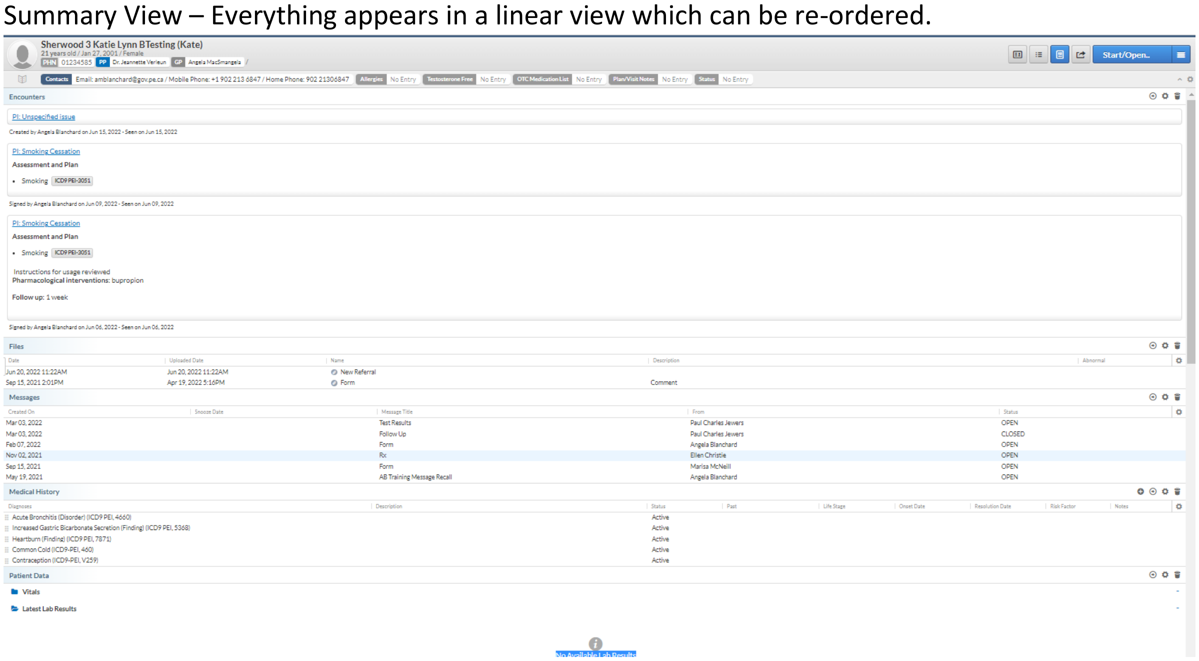
## Overview

Users can customize their dashboard and summary view to suit their preferences. TELUS has recommended certain settings to maximize CHR speed which are highlighted throughout this document.

Dashboard View – Everything appears in Widgets (boxes) which can be moved around the screen.



Summary View – Everything appears in a linear view which can be re-ordered.



## TELUS Training Videos

General Overvie0077

https://learning.inputhealth.com/CHR_Encounters_providers/#/lessons/ispajknVpNnIt7gKKnl6VZaV6JCHl_Dg

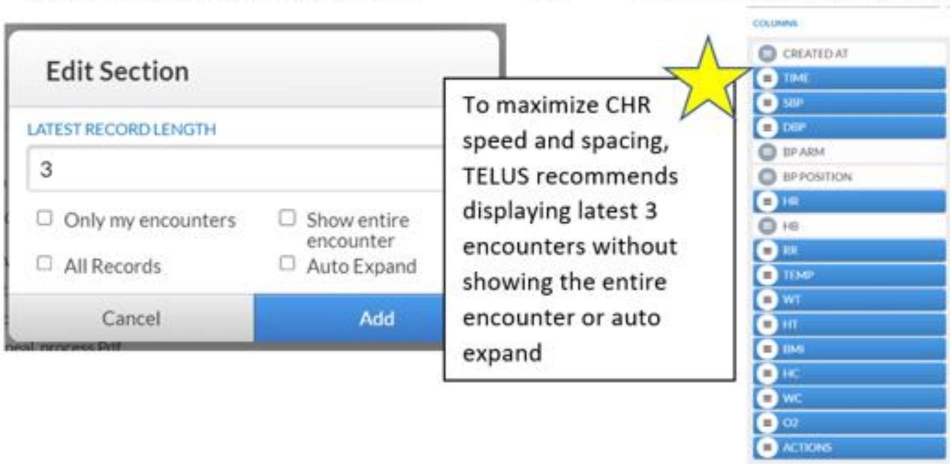
Provider https://www.screencast.com/t/fY9aJqAn

Staff https://www.screencast.com/t/pkOgshAAn3

## Adjustable Settings to Customize Your Summary View Page (Arrow, Cog and Trash Can)

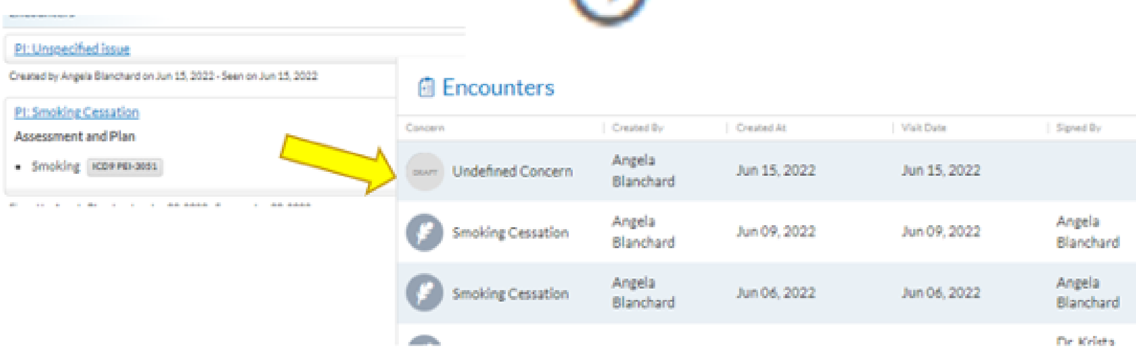
The Cog icon will enable user to sort, filter, add, or delete column headings or configure encounter view settings

Section Headings in Summary View OR Column Headings Within an Encounter



Only Assessment and Plan will show up if you do not show the entire encounter.  You may want to consider where you document your information on the encounters.

Arrow will list items from summary view

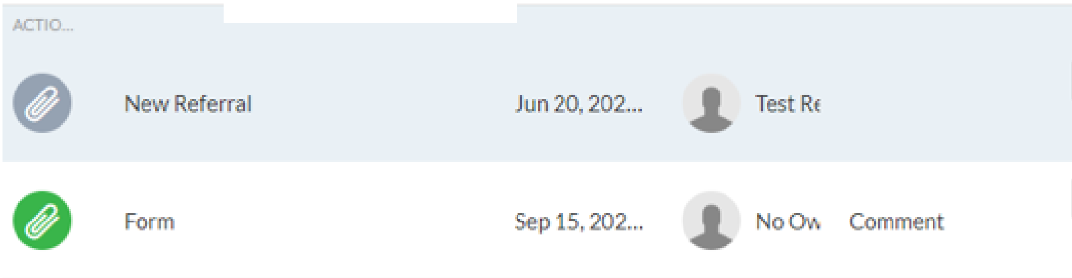


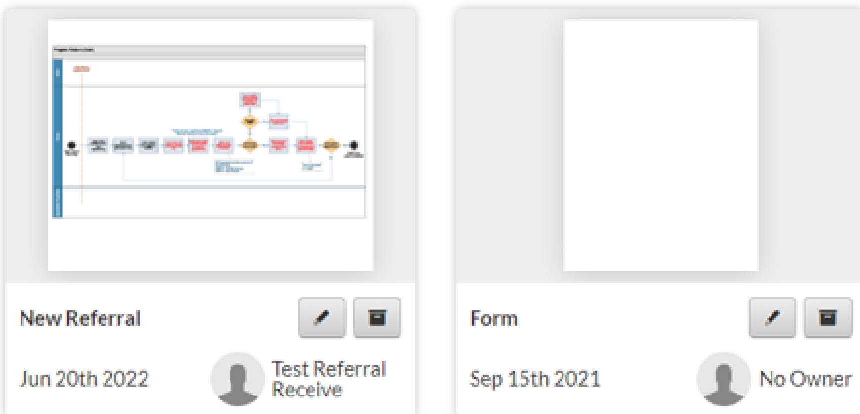

Trash can will delete items

However very few items can be deleted on CHR therefore you may receive a "permission denied" error message if this feature is not available.

List / Gallery View 

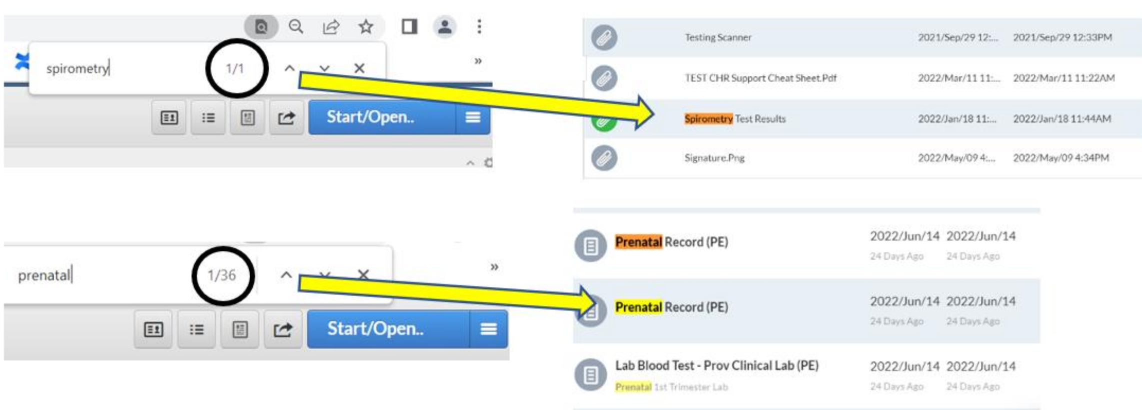
Users can view their files as text (list) or pictures (Gallery)



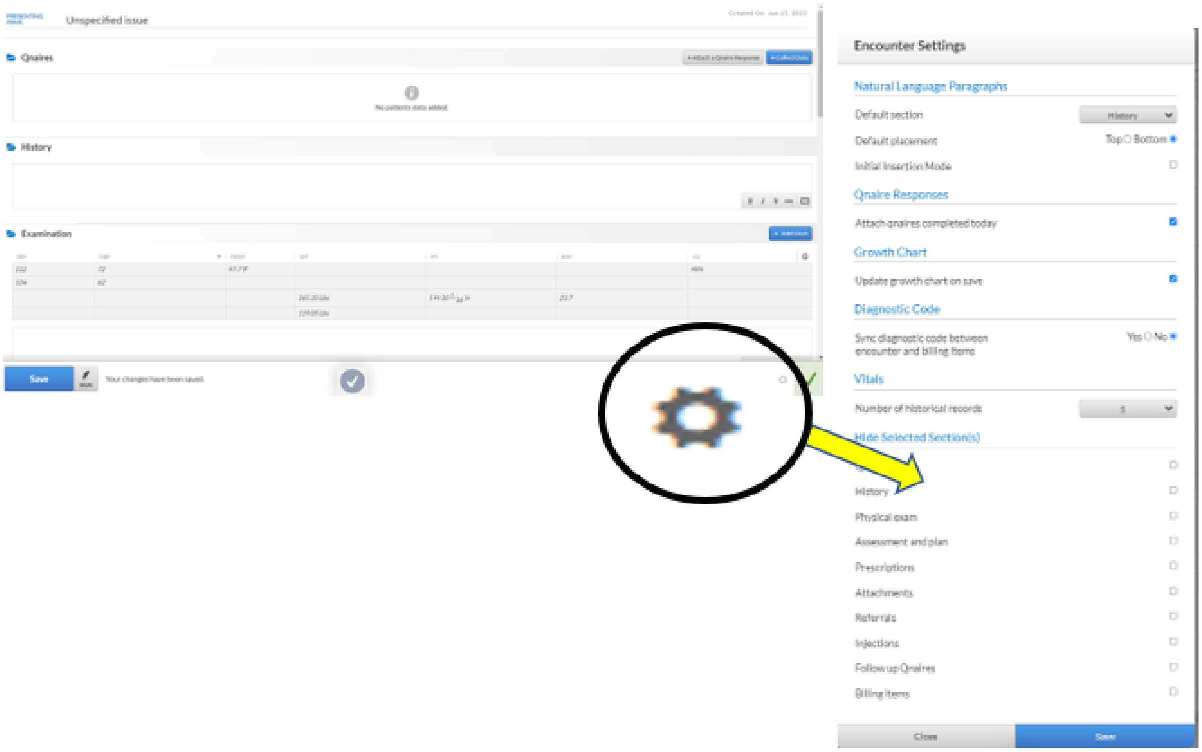

## Easy Search / Find Option

You can search for anything in the CHR by clicking **Control F** on your keyboard. When you click **Control F**, a search box will appear in the upper right-hand corner of your screen. Enter the search criteria and the CHR will highlight all relevant text on the screen



## Customizing Encounter View

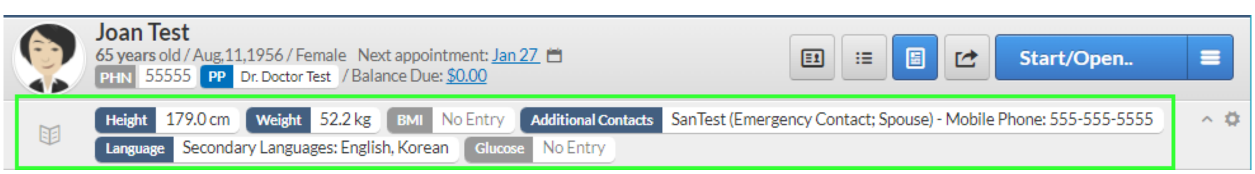
Users can customize their encounters by deleting information that isn't relevant to their workflow. For example, if Allied Health providers do not use prescriptions or billing, these items can be deleted from their encounter screen.




## Customizing Patient Header

Each user can customize the information that appears in the patient header at the top of patient charts. For example, you can display the patient's height, weight, BMI, latest lab results, as well as any other patient data. You can free text information by adding Plan / Visit Notes.

This allows you to see at a glance the information that is important to you while navigating through the patient chart. It also enables you to quickly enter or edit this data. Any customization you make is only for your user profile; it does not affect other users.

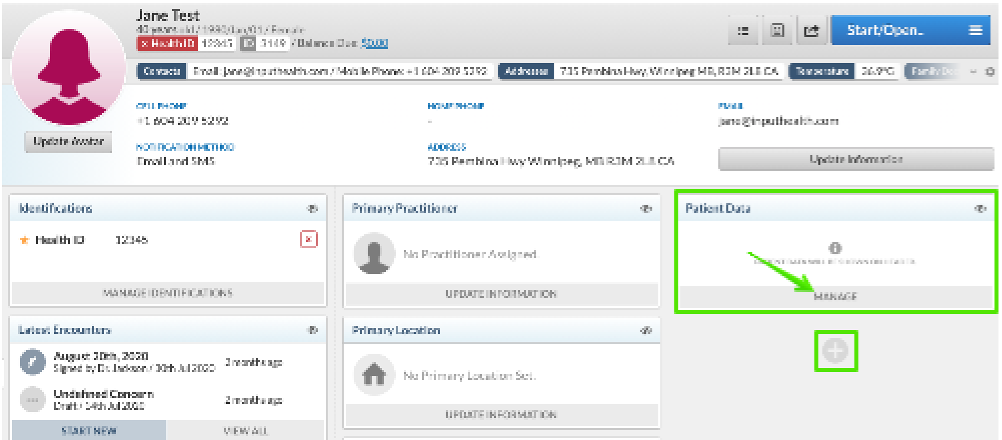



Steps

1. Open a patient chart.
2. Perform one of the following:
   - To the right of the patient header area, click the gear icon.

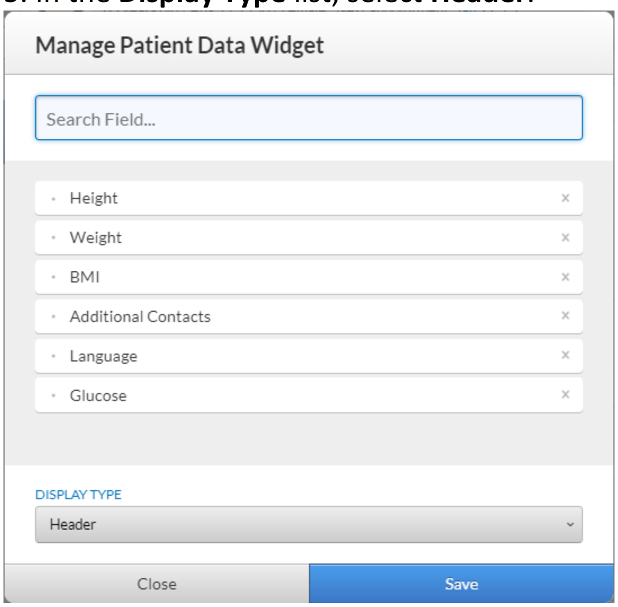
- At the top of the chart, click the **Dashboard** icon, navigate to the **Patient Data** widget and click **Manage**.

  **Tip:** If this widget does not appear, click + to add it (see Customizing the patient dashboard).

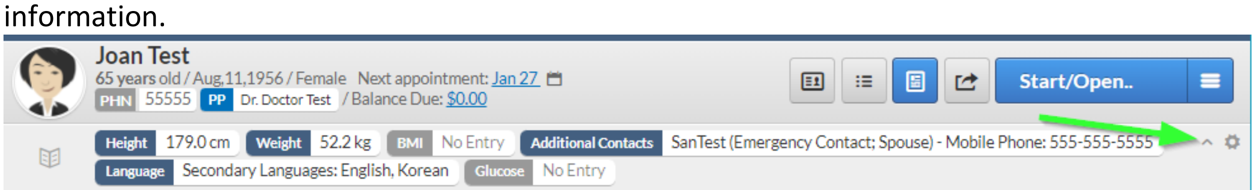



The **Manage Patient Data Widget** window opens.

4. Search for the patient data to include and select it to add it to the list.
5. In the **Display Type** list, select **Header**.




6. To change the order of the data, click and drag the data item to the correct order.
7. Click **Save**.
8. If the patient header information spans more than one line, to the right of the patient header area, click the the up arrow to collapse the information. Click the down arrow to expand the information.

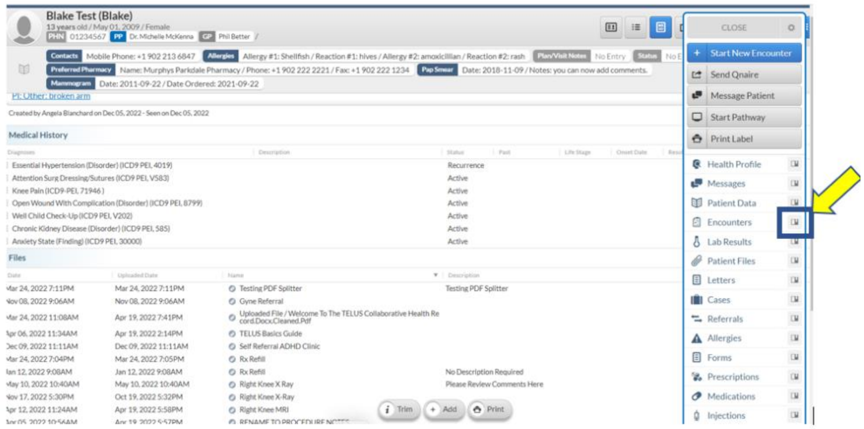


9. To edit information in the header, click the data item.

## Splitting your Screen

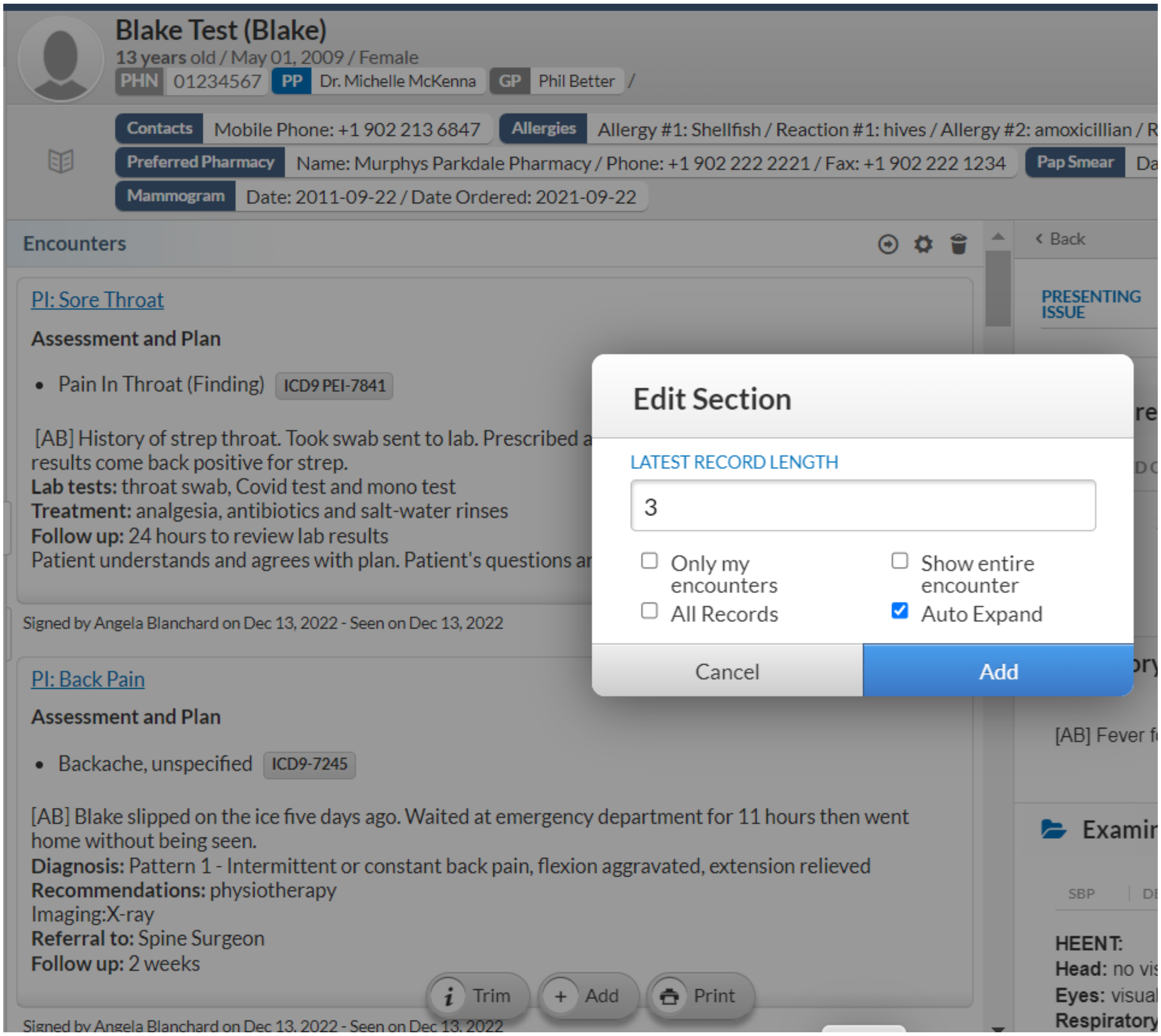
When you are in Summary view, you can split your screen by going to your start / open setting and opening the document or information by clicking on the split screen icon on the right. You have to click on this icon for the screen to split. Whatever you open first moves to the left of your screen.

If you get stuck and can't seem to open the screen you want, click on Summary or Dashboard view to reset your screen. Then try again. It can be tricky at first but once you figure it out it will become like second nature.




## Recording Pertinent Encounter Information in the Assessment and Plan Section

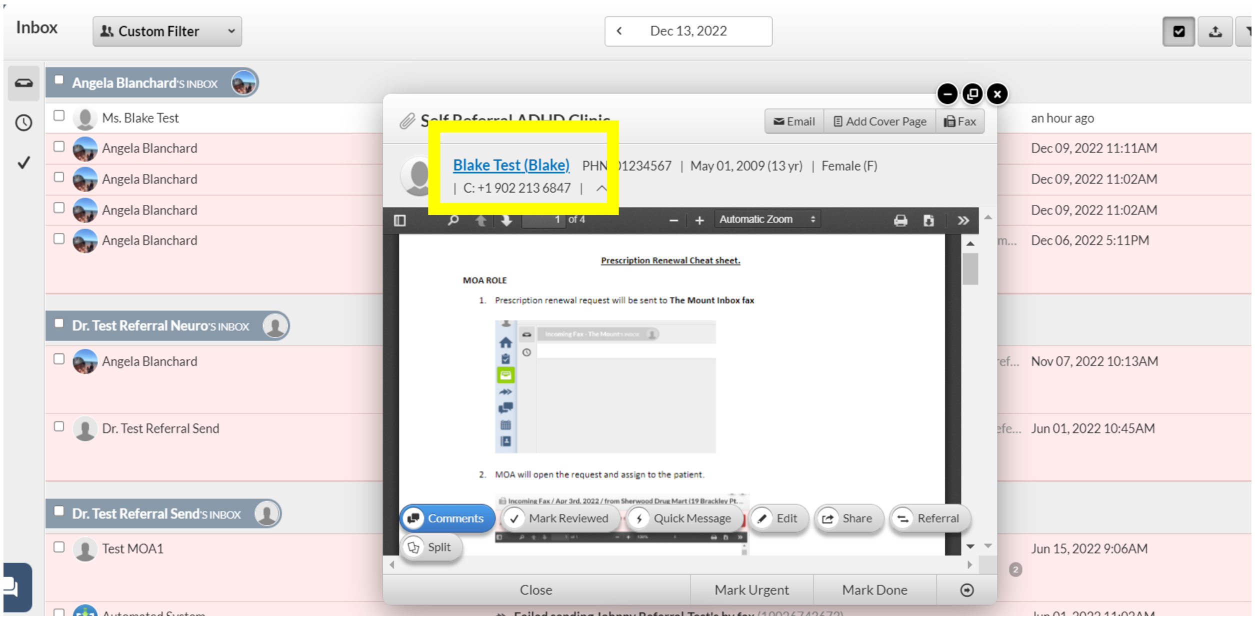
Keeping your encounters collapsed in the summary view setting can help with speed issues. It is recommended that your encounter views be set to display 3 records, auto expand, and not show the entire encounter. When your summary encounter view is set up this way, the information in the Assessment and Plan section is always visible. It is recommended that providers summarize their visit in this section so they can easily find pertinent information without opening and reading through the entire encounter.




## Viewing Files in Split Screen from the Inbox

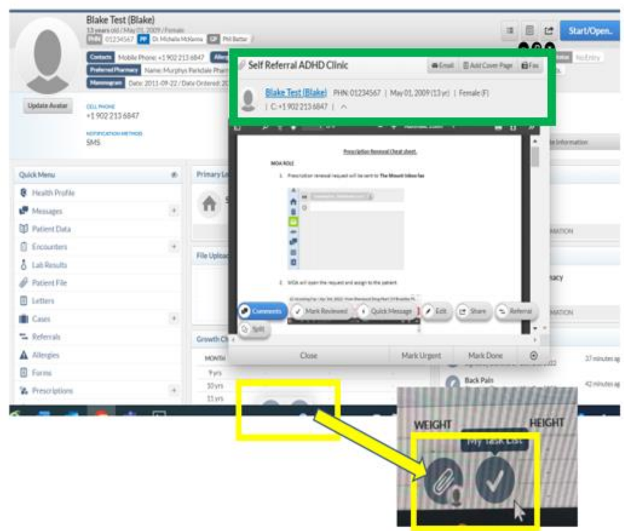
When a user opens a file from the inbox, they can then open the chart by clicking on the patient's name. When the chart opens, the file can then be retrieved by clicking on the bump at the bottom of the screen beside the task bar.

From your inbox, open the attachment. Then, open the patient chart by clicking on the name.



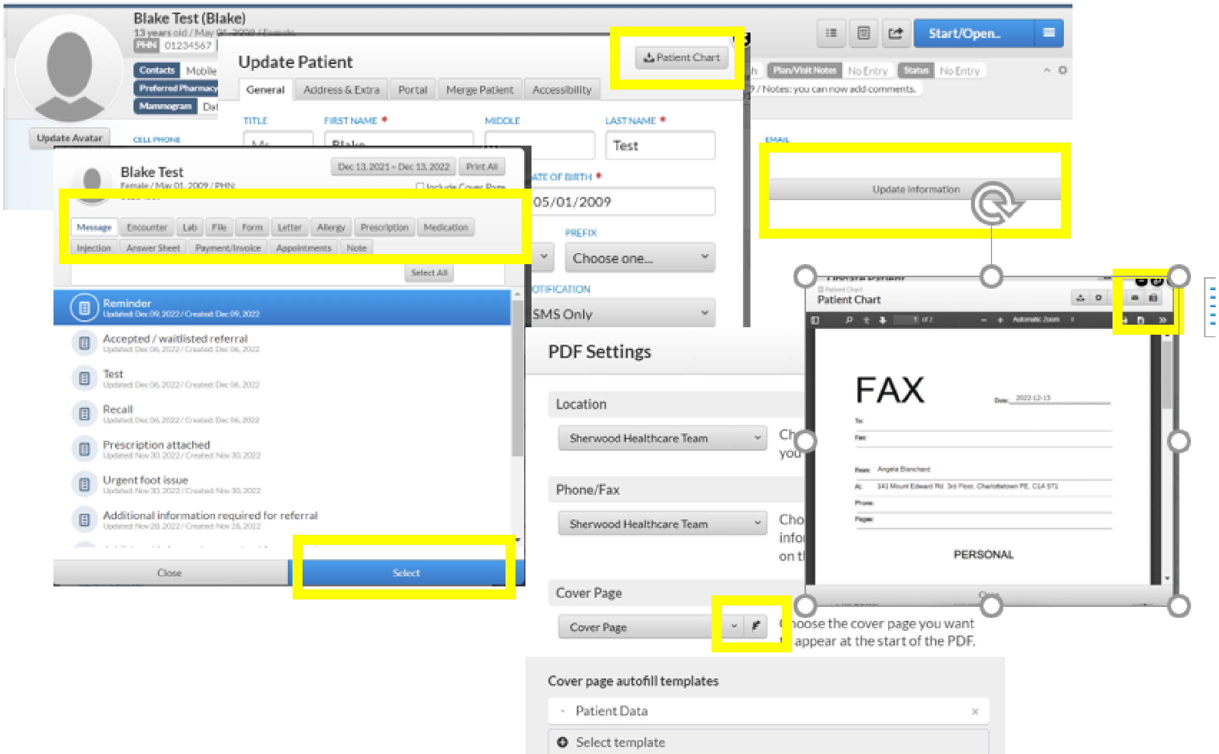

The hidden bumps at the bottom of the screen will reveal your task list and the file you just opened when you click on it. You can then move the file around your page and view other things in the chart.

The file size and location on the screen can be reconfigured by dragging the sides and bottom. Reconfigure the size settings on the green area if you are finding it difficult to get the size settings to stick.




## Selecting Multiple Items to fax from the Patient Chart

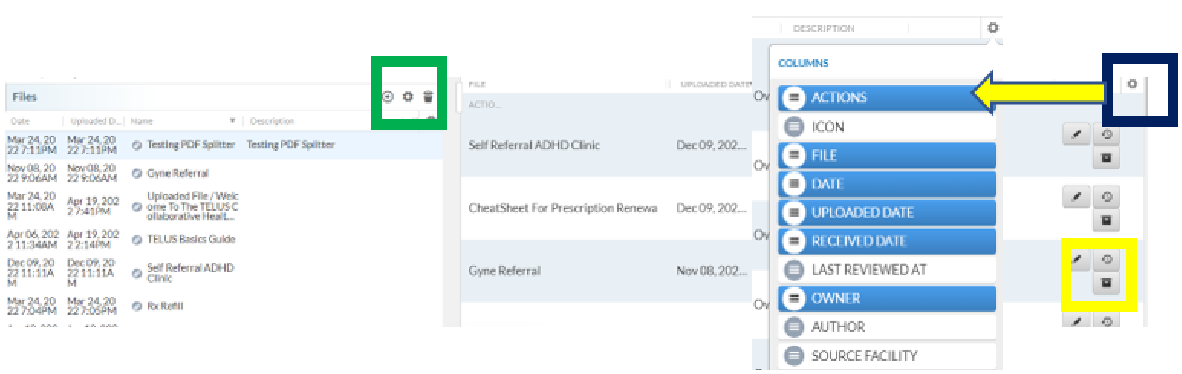
If you must fax multiple items from within a patient chart, you can select and fax them from the Update Information screen. This feature is especially helpful when sending information to insurance companies. DO NOT USE THIS FEATURE TO E-MAIL INFORMATION, ESPECIALLY TO A NON-GOVENRMENT ACCOUNT. This feature should only be used for faxes.



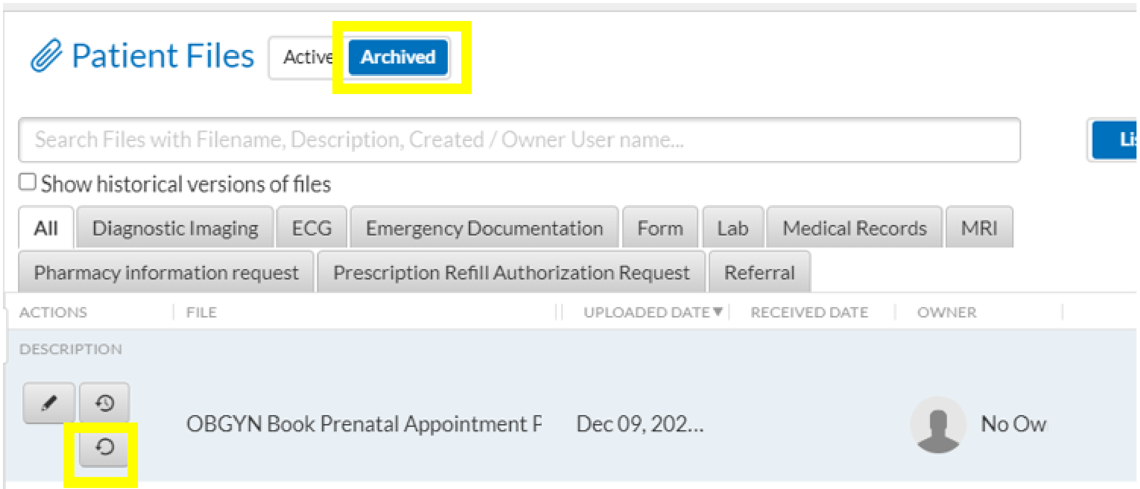

## Archiving Information

There are very few places within the CHR where patient information can be permanently deleted. If a file or form is accidently uploaded to the wrong chart, it must be archived.

Clicking on the arrow in your summary view will (green box) will open the setting that enables the ability to archive. To archive a record, click on the file cabinet icon. If the icon isn't readily visible, go to your settings cog (blue box) and make sure Actions is turned on.

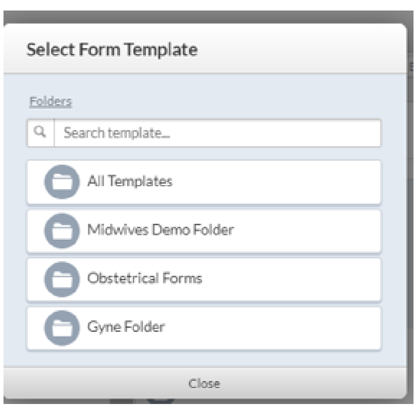


To retrieve an archived file, click on Archived files and restore it.




## Favourite Forms Folders

To reduce the need to search through than many forms on CHR, a favourite forms folder can developed for your clinic. Individualized forms folders are not available at this time however, talk to your EMR advisor to determine if a clinic based forms folder will benefit your site.

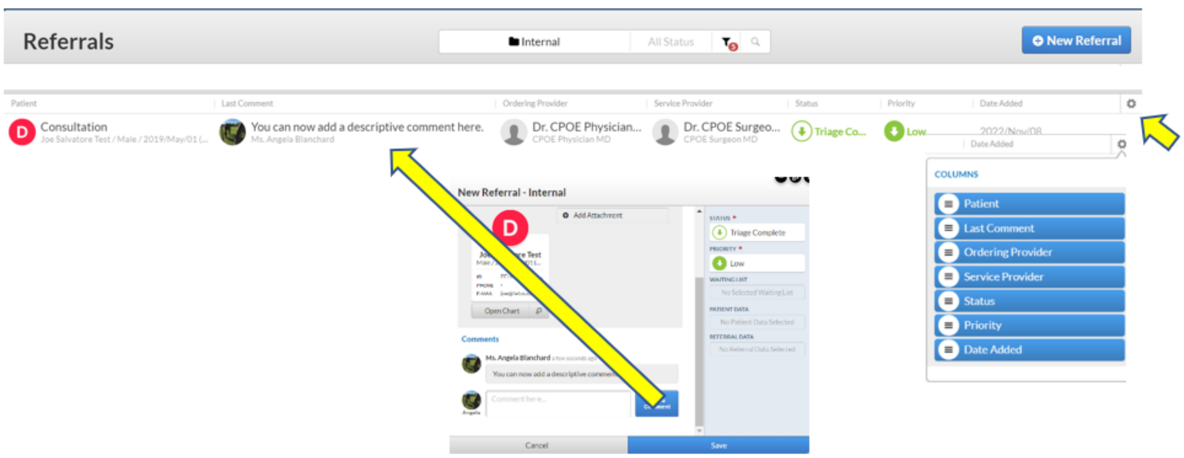



## ADDING THE MOST RECENT COMMENT TO REFERRALS FOLDERS VIEW

Users can now view the last referral comment on their referral folder.  This is a convenient way to add descriptive test to a referral. Please note that the **most recent comment** will appear in this section.

Steps:

1. In a referrals folder, click on the cog on the upper right.
2. Choose **Last Comment** so it is highlighted in blue
3. You can reorder where the comment appears on the folder by dragging it up and down on the list.
4. Click **Refresh.**




When a letter has been sent for outgoing referrals, the following comment will appear.