

InContext and Clinical Information App User Guide

JULY 2025

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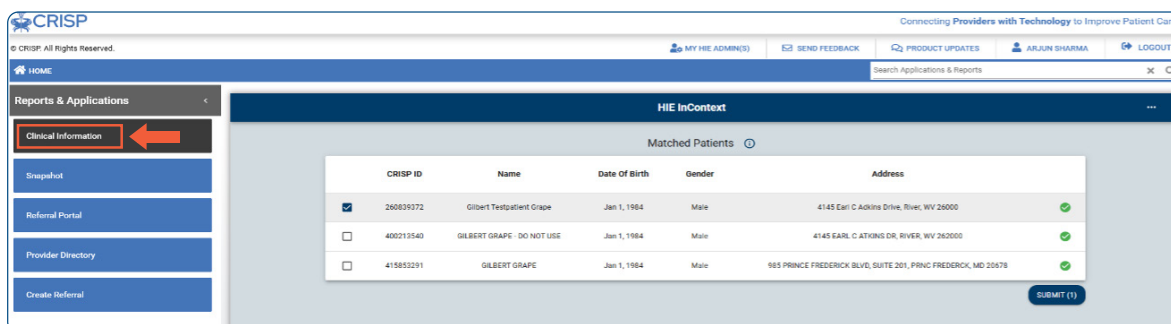
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1 Introduction and Overview



» InContext is an app that delivers high-level information designed to support clinical decision-making by sharing key information on the patient's health. The InContext app is available to be accessed from within the user's EHR workflow &/or via the CRISP portal by clicking into the clinical information section.



The HIE InContext platform gives providers the ability to access critical health information and alerts about patients such as prescription data, lab results, radiology reports, etc. The platform provides access to two major applications: CRISP Health Records and PDMP.

Key features of InContext include:

- **Patient Information** relating to the demographics profile that CRISP has on file plus a Next of Kin section with information on persons the patient has a personal or non-healthcare-specific professional relationship with (i.e., a patient's partner, nearest relatives, etc.)
- **Medication Management** including Advisories, Prescription Drug Monitoring Program (PDMP), and PDMP Interstate Sharing, Medications parsed from CCDs.
- **Clinical Data** including Health Records, Encounters, Problems, Immunizations, Allergies, Vitals and Structured Documents (Continuity of Care)
- **Care Coordination** inclusive of Care Teams, Care Alerts, Referral History, and Advance Directives
- **Social Needs Data** organized by Assessments and Conditions
- **Data from Claims** for Maryland, District of Columbia, West Virginia and Kentucky available to all providers through their point of care tools; this includes Medications, Diagnoses, Procedures, and Encounters

For any customer support items, a user should share issues to the CRISP Shared Services Customer Care Team by emailing support@crisphealth.org or calling **877-952-7477**.

2

Patient Match:
List of Patient Identities

» The Patient List displays all possible identity matches. The HIE receives data from many sources and the demographics can differ from source to source. We use the MPI to match these records but sometimes are unable to, resulting in multiple identities. Each patient will have a “Match Score” which will tell you how closely the patient matches the information sent to the HIE. A patient can either be “Probable” or “Possible”.

Enterprise ID: You may not see this screen if an exact match is found. When that happens, the system will open directly into the patient information, assuming this patient is on your panel.

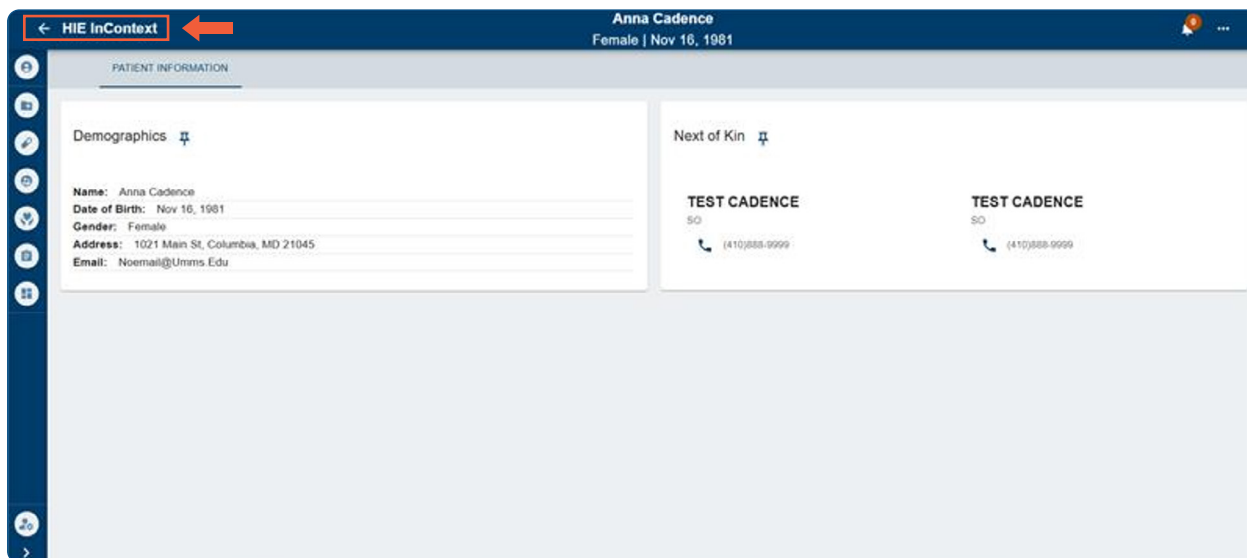
HIE InContext					
Matched Patients ⓘ					
CRISP ID	Name	Date Of Birth	Gender	Address	
79559712	ANNA CADENCE	Nov 16, 1981	Female	1021 MAIN ST, COLUMBIA, MD 21045	✓
80003122	Anna Cadence	Nov 16, 1981	Female	Unknown	✓
81222440	Anna Cadence	Nov 16, 1981	Unknown	1212 Eight Mile Rd, Baltimore, MD 21231	✓
81733470	Anna Cadence	Nov 16, 1981	Female	123 Epic St, Los Angeles, CA 90210	✓
81957879	ANNA CADENCE	Nov 16, 1981	Female	32 main, Owings Mills, MD 21117	✓
81997178	ANNA CADENCE	Nov 16, 1981	Female	Unknown	✓
81997198	ANNA CADENCE	Nov 16, 1981	Female	Unknown	✓
81997204	ANNA CADENCE	Nov 16, 1981	Female	Unknown	✓

3 Menu Items: How to Navigate

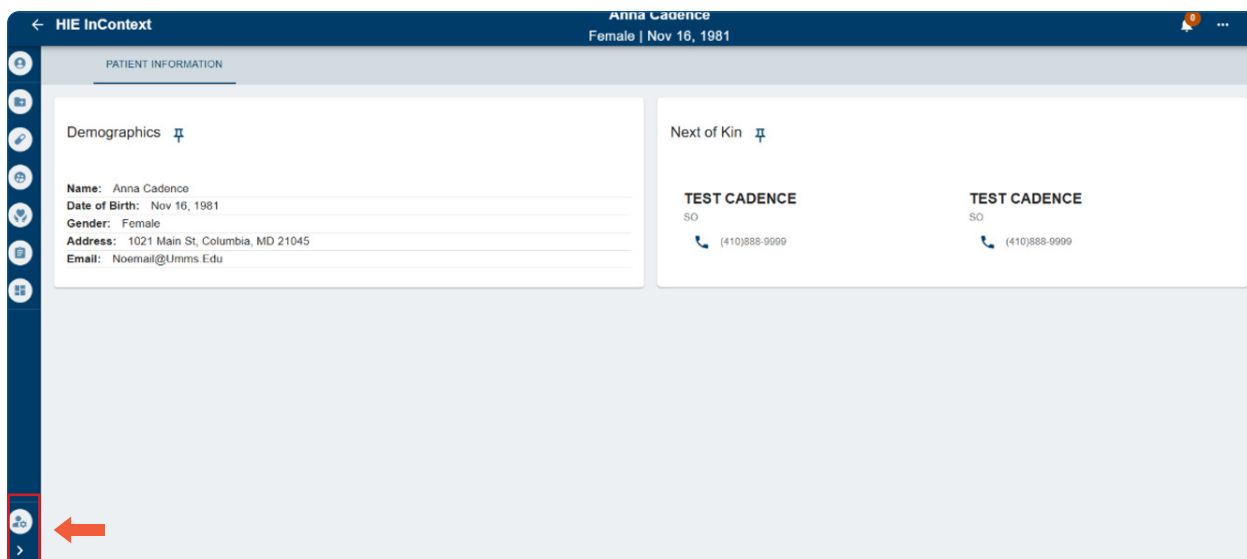


» In **larger screen sizes**, the app menu will appear on the left side. Use this left menu to navigate to the other sections of the app. If you minimize your screen size, this menu will collapse.

If you'd like to go back to the patient list, click the [Back icon](#).



In **smaller screen sizes**, the InContext menu will be collapsed. In order to navigate to other sections of the app, click the [Expand Menu icon in the bottom left corner](#).



4

Refining Patient Information: Quick Access Features



» Data is primarily displayed in tables, enabling a user to quickly search and identify information they are interested in reviewing.

The following table features promote quick access to information:

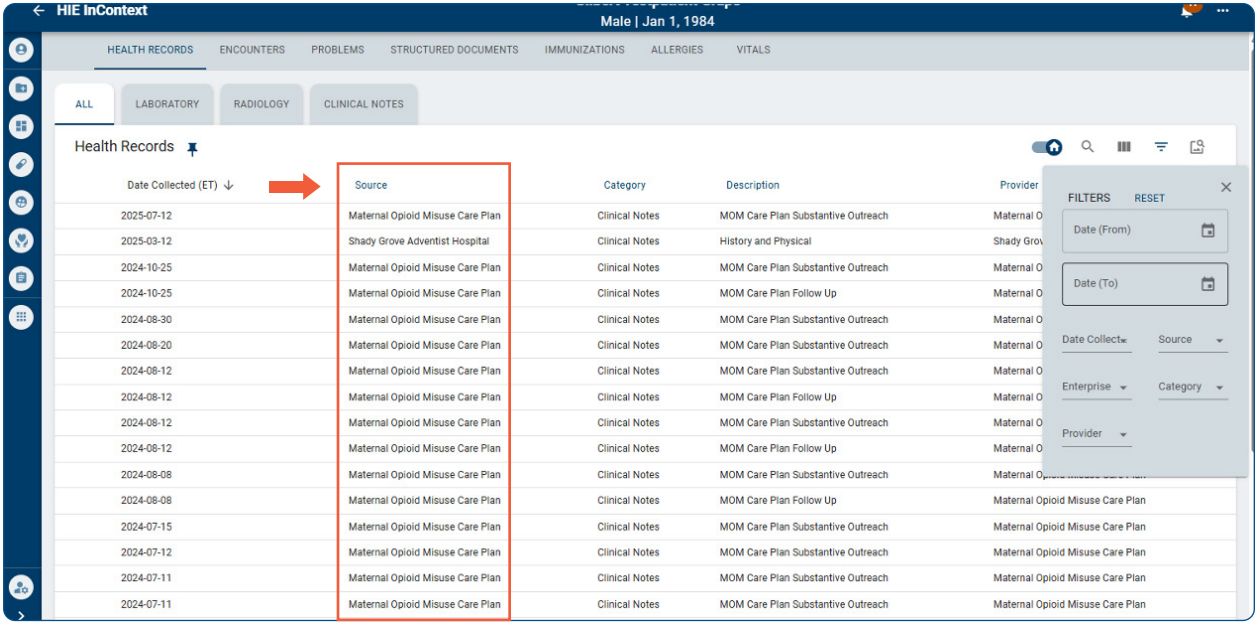
- **Sort:** All columns in tables can be sorted in ascending and descending order. Click on the column name to sort the table by that column's data.
- **Search:** All data in the tables – and underlying records – will be filtered for the content value that is entered into the search textbox
 - Search not only queries the table but also performs a deep search into the underlying documents associated with the rows.
- **View:** Table columns can be added and removed to change the display

Health Records				    
Date Collected ↓	Source	Description	Provider	
 2022-04-08	MEDSTAR_FSH	Example PDF 7	MedStar Franklin Square Hospital Center	
 2022-04-08	University of MD UMMC UMMS	Example PDF 1	University of Maryland Medical Center	
 2022-04-08	University of MD UMMC UMMS	Example PDF 2	University of Maryland Medical Center	
 2022-04-08	University of MD UMMC UMMS	Example PDF 3	University of Maryland Medical Center	
2022-04-05	CRISP_REFER	Referral for further care	—	
2022-03-21	Western Maryland Hospital	Serum or plasma potassium measurement (moles/volume)	ZZZJLW JORDAN WILSON	
2022-02-16	CRISP_REFER	Referral for further care	—	
2022-02-16	CRISP_REFER	Referral for further care	—	
2022-02-16	CRISP_REFER	Referral for further care	—	
 2022-02-10	TIDALHEALTH	ECG 12-LEAD	30160 CHRISTIAN BOUNDS	
 2022-02-01	TIDALHEALTH	ECG 12-LEAD	30160 CHRISTIAN BOUNDS	
2022-01-24	DCH	BASIC METABOLIC PANEL	1043396633 MUSHTAQ SHAH	
2022-01-13	ENS_PIMRRF	PIMR	PIMR-Talbot County Health Department	
2022-01-12	ENS_WKSPWIZ	Diabetes Prevention Program	Non-Medicaid Health Choice DPP	
2022-01-05	CRISP_REFER	Referral for further care	—	

- **Filter:** Specific columns can be filtered for values in order to display specific information of interest to the user.
 - Filter enables querying on a specific column. If a user wanted to only see rows from “University of MD”, she could click Filter Table, select the Source column and select the value “University of MD”. The resulting query would then only display row for that Source .

4

Refining Patient Information: Quick Access Features

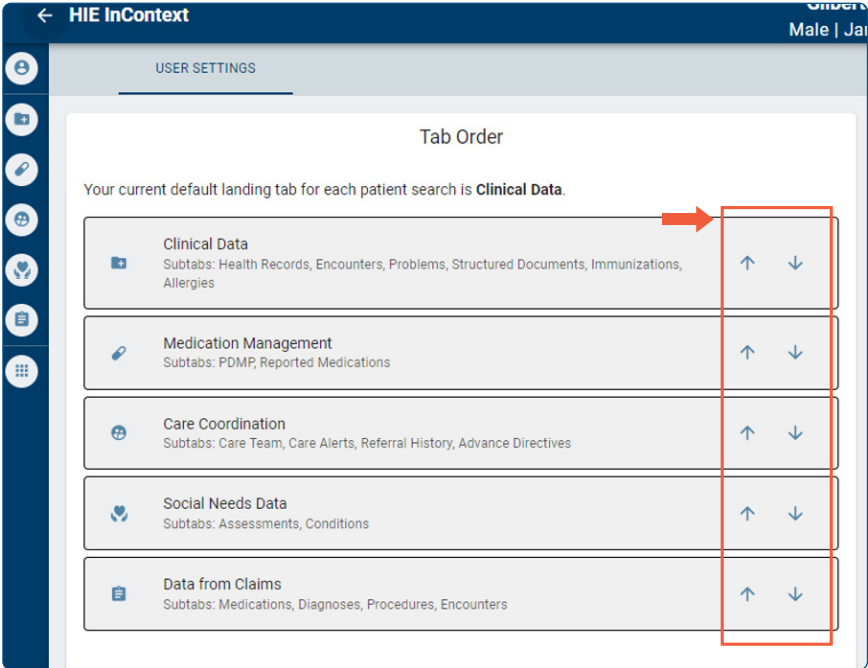


5

Customizing Application Tab Arrangement



» Users can reorder their tab arrangement by going into the user settings and using the arrows. The upper most tab will be the default landing page when users log into the app.



6 Patient Demographics



» The Patient Demographics Information is displayed in two places:

- **Along the header:** First name, Last name, Gender and Date of Birth will be visible to compare against EHR information
- **Patient Information tab:** All the above information is viewable along with further contact information including address and phone numbers

Gilbert Testpatient Grape
Male | Jan 1, 1984

PATIENT INFORMATION

Demographics

Match Grade: ✔ Probable

Name: Gilbert Testpatient Grape

Date of Birth: Jan 1, 1984

Gender: Male

Address: 4145 Earl C Adkins Drive, River, WV 26000

Home Phone: (240) 826-6000

Mobile Phone: (999) 999-4349

Next of Kin

UNEM

NELY GRAPE
U
(444) 555-5555

UNEMPLOYED

GIRLMOM ZZZSGAHREGRESSION
(301) 111-1111

ZZZBROTHER ZZZBROTHER
B

The Next of Kin displays the patient's nearest relative or relatives and their contact information.

ANNA CADENCE
Female | Nov 16, 1981

DEMOGRAPHICS **NEXT OF KIN**

Next of Kin

TEST CADENCE
SO
Phone (Mobile): (410)888-9999

ALAN CADENCE
H
Phone (Mobile): (665)908-7865

NO ONE
Unknown Relationship
Phone (Mobile): (410)888-9999

HELEN TSTMOM
Mother
Phone (Mobile): (410)888-9999

Unknown Name
Other
Phone (Mobile): (410)550-0100

PTher CONTACT
Unknown Relationship
Phone (Mobile): (410)888-9999

JIM CADENCE
H
Phone (Mobile): (555)555-5555

HUSBAND HUSBAND
S
Phone (Mobile): (410)888-9999

OMAR CONTACTNONPT
Unknown Relationship

ANS
Unknown Relationship

7 Priority Alerts



» Priority Alerts is a section which appears on the top tool bar. These alerts will include clinical alerts and infectious control alerts. Users can click the Priority Alerts icon (Bell Icon) to launch the Priority Alerts text box pop up screen. The Priority Alert Icon will display the number of total alerts for the selected patient over the icon itself.

ANNA CADENCE
Male | Nov 16, 1981

Priority Alerts

Opioid & Benzos: 0 Overlapping Opioids: 0 Total Prescribers/Pharmacies: 3/2

Priority Alerts

Date ↓	Source	Description	Type
2020-10-01	University of MD UMMC UMMS	Patient may have experienced a controlled substance related event on 2020-10-01 at University of Maryland Medical Center. Discharge Diagnosis: T40.0X (Poisoning by Robbbbie).	Clinical Alert
2020-04-29	University of MD UMMC UMMS	Patient may have experienced a controlled substance related event on 2020-04-29 at University of MD UMMC UMMS. data: thing (a data thing).	Clinical Alert
2020-01-14	Alert.Source	Infection Control Alert: Refer to facility and CDC policy for CRE isolation and treatment guidance	Infection Control Alert
2019-12-27	AAMC Parent	Infection Control Alert: Refer to facility and CDC policy for CRE isolation and treatment guidance	Infection Control Alert
2019-01-20	University of MD UMMC UMMS	Patient may have experienced a controlled substance related event on 2019-01-20 at Office Test. Discharge Diagnosis: T40.2X1A (Poisoning by other opioids, accidental (unintentional), initial) ((Patient may have experienced an overdose even on 2019-01-20 20:30 at MMC.)). Admit Reason: Overdose on Controlled Dangerous Substance.	Clinical Alert

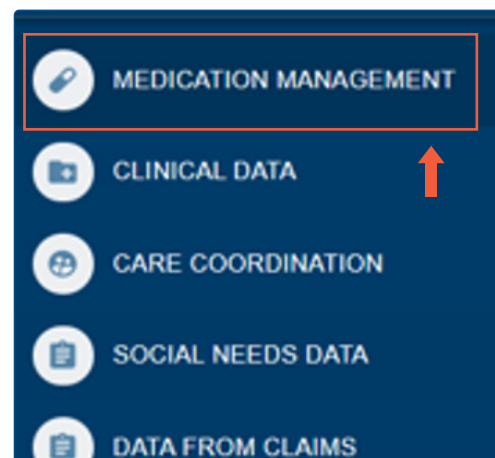
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8 Medication Management



» The “Medication Management” section includes Reported Medications which provides the patient’s medication data received in Consolidated Clinical Documents (CCDs) sent to the HIE. Medications will be displayed in a 90 day view as well as a full historical lookback.

- **Provider** - The provider reported in the medications record
- **Start Date** - Start date present on EMR
- **Last Reported Date** - Most recent date on record received by the HIE



Anna Cadence
Female | Nov 16, 1981

REPORTED MEDICATIONS

LAST 90 DAYS ALL

Reported Medications - All

Generic Name ↑	Medication Name	Dose	Sig	Provider	Start Date	Last Reported Date
diazepam (DIASAT ACUDIAL) 5-7.5-10 mg rectal kit	diazepam (DIASAT ACUDIAL) 5-7.5-10 mg rectal kit	5mg	Place 5 mg rectally once as needed for Seizures Motor seizures greater than 5 minutes	—	2022-04-07	2022-04-26
levETIRAcetam (KEPPRA) 100 mg/mL solution	levETIRAcetam (KEPPRA) 100 mg/mL solution	350mg	Take 3.5 mLs (350 mg) by mouth 2 (two) times daily	—	2022-02-11	2022-04-26
polyethylene glycol (MIRALAX) 17 gram/dose powder	polyethylene glycol (MIRALAX) 17 gram/dose powder	8.5g	Take 8.5 g by mouth daily	—	2022-01-12	2022-04-26

Rows per page: 25 1-3 of 3

9 Clinical Data



» The “Clinical Data” section provides:

- **Health Records** displays Radiology reports, Laboratory reports, and Clinical Notes received from CRISP participants for the patient.

← HIE InContext **Anna Cadence**
Female | Nov 16, 1981

HEALTH RECORDS ENCOUNTERS PROBLEMS STRUCTURED DOCUMENTS IMMUNIZATIONS ALLERGIES VITALS

ALL LABORATORY RADIOLOGY CLINICAL NOTES

Health Records ⌵

Date Collected (ET) ↓	Source	Category	Description	Provider
2025-07-24	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Intake	Maternal Opioid Misuse Care Plan
2025-03-18	St. Agnes Hospital	Laboratory	AFB STAIN SPUTUM	ABBOODHAY HAYDER ABBOOD
2025-03-18	St. Agnes Hospital	Laboratory	AFB SPUTUM	ABBOODHAY HAYDER ABBOOD
2025-02-14	ST. MARYS COUNTY EMERGENCY SERVICES	Clinical Notes	MD Ambulance PDF Report	ST. MARYS COUNTY EMERGENCY SERVICES
2024-08-27	WVHIN - WVU - Berkeley Medical Center	Clinical Notes	Clinical Summary	1629128947 ANTHONY MARK
2024-08-27	CT_THSMH	Laboratory	Blood group antibodies SerPII	1780020073 KRISHNA SURY
2024-08-20	UPMC Western Maryland	Clinical Notes	Outpt Post-Op DCI/Progress Note	1538241153 MARY ANNE
2024-06-13	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Ongoing	Maternal Opioid Misuse Care Plan
2024-06-13	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Ongoing	Maternal Opioid Misuse Care Plan
2024-06-13	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Ongoing	Maternal Opioid Misuse Care Plan
2024-06-13	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Ongoing	Maternal Opioid Misuse Care Plan
2024-06-13	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Ongoing	Maternal Opioid Misuse Care Plan
2024-06-13	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Substantive Outreach	Maternal Opioid Misuse Care Plan
2024-06-13	Maternal Opioid Misuse Care Plan	Clinical Notes	MOM Care Plan Substantive Outreach	Maternal Opioid Misuse Care Plan

- **Encounters** displays information regarding the patient's previous inpatient or outpatient encounters. This includes date, source, and may also include additional information such as Discharge Diagnosis and Admit Reason. This information is parsed from CCDs.

← HIE InContext **Anna Cadence**
Female | Nov 16, 1981

HEALTH RECORDS ENCOUNTERS PROBLEMS STRUCTURED DOCUMENTS IMMUNIZATIONS ALLERGIES VITALS

ALL HOSPITAL OUTPATIENT

All Encounters ⌵

Date	Source	Location	Patient Class	Diagnosis	Discharge Disposition
2025-06-08	Greater Baltimore Medical Associates	FAMCAREASSOCs	Ambulatory	—	—
2025-01-28	UM Urgent Care - Main	9595189401010	Ambulatory	—	—
2024-11-25	University of Maryland Medical System	518893055	Ambulatory	—	—
2024-02-29	UConn Health	FMGENDERMATOLOGY	Ambulatory	—	—
2023-10-10	UPMC - Western Maryland	WAC	Ambulatory	—	—
2023-10-10	UPMC - Western Maryland	7NORTH-A	Inpatient	—	—
2023-09-24	Anchor Mental Health of Catholic Charities	—	Ambulatory	F25.1-Schizoaffective disorder, depressive type; F25.1-Schizoaffective disorder, depressive type	—
2023-09-20	UPMC - Western Maryland	7NORTH-A	Inpatient	—	1
2023-09-13	Greater Baltimore Medical Associates	FAMCAREASSOCs	Ambulatory	Z00.00-Encounter for general adult medical examination without abnormal findings, Z00.00-Encounter for general adult medical examination without abnormal findings	—



- **Problems** displays a consolidated list of active problems from organizations that are parsed from CCDs. Each problem includes first and last reported date and the most recent organization to report the problem to the HIE.

← HIE InContext Anna Cadence Female | Nov 16, 1981

HEALTH RECORDS ENCOUNTERS PROBLEMS STRUCTURED DOCUMENTS IMMUNIZATIONS ALLERGIES VITALS

Problems

Description	Code	First Reported Date	Last Reported Date ↓	Last Reported By
PALPITATIONS (FINDING)	80313002	—	2023-03-12	Charleston Area Med Center Gen Hospital
TYPE 2 DIABETES MELLITUS WITH HYPERGLYCEMIA, WITHOUT LONG-TERM CURRENT USE OF INSULIN	E11.65	2022-01-03	2023-03-12	Meritus Medical Center
URINE FREQUENCY	R35.0	2015-11-09	2023-03-10	Endocrine Associates of CT LLC
AFTERCARE FOLLOWING SURGERY OF THE MUSCULOSKELETAL SYSTEM	V58.78	2022-09-19	2023-03-10	Connecticut Orthopedic Specialists PC
MARIJUANA USE	F12.90	2023-02-23	2023-03-10	United Hospital Center
INSOMNIA, UNSPECIFIED	G47.00	—	2023-03-09	Nuvance Health Medical Practices
CHRONIC RHINITIS	J31.0	2019-09-25	2023-03-09	Connecticut Childrens Medical Center
DIPLOPIA	H53.2	2023-01-24	2023-03-09	Anne Arundel Medical Center
ACUTE PAIN OF LEFT KNEE	M25.562	2021-10-14	2023-03-09	Anne Arundel Medical Center
TYPE 2 DIABETES MELLITUS WITH HYPERGLYCEMIA, WITHOUT LONG-TERM CURRENT USE OF INSULIN (CMS HCC)	E11.65	2022-01-19	2023-03-08	Braxton County Memorial Hospital WV
MACULAR DEGENERATION	H35.30	2022-04-17	2023-03-08	Hartford Healthcare
DILATED RENAL PELVIS	N28.89	—	2023-03-08	Camden Clark Medical Center
MYOFASCIAL PAIN DYSFUNCTION SYNDROME	M79.18	—	2023-03-08	Ruby Memorial
CIGARETTE SMOKER	F17.210	2015-07-07	2023-03-07	Patient Choice Medical Care LLC

- **Structured Documents** lists Continuity of Care Documents (CCD), which contain sections to help healthcare professionals understand a patient's continuation of care. This subtab CCDs from participants facilities as well as CCDs returned from National Network queries.
- **Immunizations** provides a patient's available immunization history parsed from CCDAs, also containing information from the relevant state's Immunization Information System (IIS).

← HIE InContext Anna Cadence Female | Nov 16, 1981

HEALTH RECORDS ENCOUNTERS PROBLEMS STRUCTURED DOCUMENTS IMMUNIZATIONS ALLERGIES VITALS

Electronic Health Records Immunizations

Immunization data from Electronic Health Records may include patient-reported as well as provider-administered immunizations.

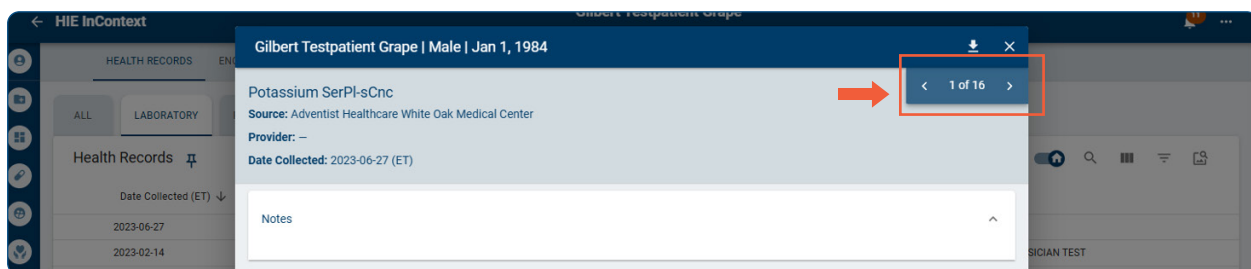
Administered Date ↓	Vaccine	Administered Location	Last Reported By	Last Reported Date
—	Pneumococcal 23	Hartford Healthcare	Hartford Healthcare Corporation	2023-07-25
—	FLU	Hartford Healthcare	Hartford Healthcare Corporation	2023-07-25

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- » • **Allergies** displays a consolidated list of allergies from organizations that contribute electronic health record allergy data to the HIE. Each allergy includes the reaction, comments and the last reported date from the most recent organization to report that allergy to the HIE.
- **Vitals:** This tab displays a patient's vital signs parsed from CCDs. It provides a chronological view of key vitals—such as blood pressure, temperature, heart rate, and respiratory rate—consolidated from external encounters to support clinical decision-making.

This is an example of a Health Record in which users can flip through records using the numbers marked with arrows in the upper right corner, as well as download individual records.



10 Care Coordination



- » The “Care Coordination” section includes Care Team, Care Alerts, Referral History, and Advance Directives.
- **Care Team** displays the organizations that are subscribed to the given patient. This will also include additional information about the patient’s Care Program and Care Manager.

HIE InContext

Anna Cadence
Female | Nov 16, 1981

CARE TEAM		REFERRAL HISTORY				
Care Team						
Source	Care Program	Provider	Role	Start Date	Last Updated	
UMMS EPIC	—	—	—	2024-11-25	—	
Camden Clark Medical Center	—	—	—	2024-11-06	—	
Doctors Community Hospital	—	ELLEGANT SYMEON PEARSON	Primary Care	2024-11-04	—	
Western Maryland Hospital	—	DEENA DOCTOR	Primary Care	2024-11-04	—	
Western Maryland Hospital	—	JORDAN WILSON	Primary Care	2024-11-04	—	
UConn Health System	—	Hector Pun	Primary Care	2024-11-04	—	
Providence Alaska Medical Center	—	—	—	2024-11-04	—	
Yale New Haven	—	—	—	2024-11-04	—	
Ruby Memorial	—	—	—	2024-11-04	—	
Greater Baltimore Medical Associates	—	WILLIAM BENJAMIN HAND	Primary Care	2024-10-09	—	
Providence Alaska Medical Center	—	—	—	2024-06-20	—	
UConn Health	—	Hector Pun	Primary Care	2024-02-29	—	
Ruby Memorial Hospital	—	—	—	2024-01-31	—	

- **Referral History** displays referrals made via the portal to organizations that address the patient’s social needs. It will also include information on the outcomes of the referrals, the referral sender, and the referral recipient when available.

HIE InContext

Anna Cadence
Female | Nov 16, 1981

CARE TEAM		REFERRAL HISTORY		
Referral History				
Date of Referral	Source	Program Name	Status	Last Updated
2025-07-23	CRISPReferralUI	MorgansBigOIPProgram	Pending	2025-07-23
2025-07-07	CRISPReferralUI	PIMR (Postpartum Infant and Maternal Referral) Care Management	Pending	2025-07-07
2025-07-07	CRISPReferralUI	PIMR (Postpartum Infant and Maternal Referral) Care Management	Pending	2025-07-07
2025-06-16	CRISPReferralUI	MD Public Health Agency	Pending	2025-06-16
2025-06-05	CRISPReferralUI	MD Public Health Agency	Pending	2025-06-05
2025-05-15	CRISPReferralUI	MD Public Health Agency	Pending	2025-05-15
2025-05-14	CRISPReferralUI	MD Public Health Agency	Pending	2025-05-14
2025-05-14	CRISPReferralUI	PIMR	Pending	2025-05-14
2025-05-14	CRISPReferralUI	PIMR	Pending	2025-05-14
2025-04-25	CRISPReferralUI	MCOTester1	Expired	2025-04-25
2025-03-17	CRISPReferralUI	MD Public Health Agency	Enrolled	2025-03-25
2025-03-25	CRISPReferralUI	MCOTester	Expired	2025-03-25
2024-08-02	CRISPReferralUI	MCOTester1	Expired	2024-10-31
2024-06-07	CRISPReferralUI	Test Program A	Expired	2024-09-05

11 Social Needs Data



» The “Social Needs Data” section displays data related to a patient’s health related social needs.

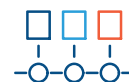
- **Assessments** provide a patient’s responses to structured social determinant of health questionnaires provided to the HIE.

HIE InContext			
Anna Cadence Female Nov 16, 1981			
ASSESSMENTS		CONDITIONS	
Assessments	Date ↓	Source	Description
🚩	2025-05-14	CRISP_REFER	PRAPARESDOH
🚩	2025-05-06	CRISP_REFER	PRAPARESDOH
	2024-09-12	CRISP_REFER	ASCENSIONSDOH
🚩	2024-08-30	CRISP_REFER	BPCHSDOH
🚩	2024-08-30	CRISP_REFER	MSFCSDOHC
🚩	2024-05-06	FMH_ID	FREDERICKSDOH
🚩	2024-05-06	CRISP_REFER	WVUMSDOH
🚩	2023-11-17	CRISP_REFER	FRNSDOH
🚩	2023-11-14	CRISP_REFER	FRNSDOH
🚩	2023-11-14	CRISP_REFER	FRNSDOH
	2023-10-17	MyDirectives.com	MERITUSSDOH
🚩	2023-10-17	MyDirectives.com	UMCSDOH
🚩	2023-07-05	CRISP_REFER	CALVERTSDOH
🚩	2023-06-21	CRISP_REFER	WVUMSDOH
🚩	2023-06-05	CRISP_REFER	FREDERICKSDOH

- **Conditions** display identified conditions from Z-codes sent from participants to the HIE in health records.

HIE InContext			
Anna Cadence Female Nov 16, 1981			
ASSESSMENTS		CONDITIONS	
Conditions	Date ↓	Source	Z-Code
Description			
No Conditions available.			

12 Data from Claims



» The “Data From Claims” section displays the data the HIE receives from Claims sources. Currently, CSS is receiving Claims data from DC, MD, and WV and Kentucky. This data includes **Medications**, **Diagnosis**, **Procedures**, and **Encounters**.

Date	Medication	Quantity	Supply	Prescriber
2022-04-25	loratadine	30	30	WEHBERG, JENNIFER
2021-12-02	amoxicillin	100	10	WEHBERG, JENNIFER
2021-11-29	SARS-CoV-2 mRNA (tozinameran 5y-11y) vaccine	0	1	DONALDSON, KAREN
2021-11-08	SARS-CoV-2 mRNA (tozinameran 5y-11y) vaccine	0	1	DONALDSON, KAREN
2021-06-09	loratadine	30	30	WEHBERG, JENNIFER
2021-06-09	fluticasone nasal	16	30	WEHBERG, JENNIFER
2021-03-16	ketconazole topical	120	14	ADAMS, ADAM
2020-10-06	fluticasone nasal	16	30	ADKINS, AMBER

13 Application Resources



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

» The **user feedback** feature provides the ability to submit comments and/or suggestions for the app. By navigating to the App menu (top right corner – indicated by ellipses), a user can click on the ‘Feedback’ option. This feedback can receive PHI.

The “**Glossary**” feature provides more information about all the app data and features including icons. By navigating to the App menu (top right corner – indicating by ellipses), a user can click on the ‘Glossary’ option.

The “**About**” feature provides information about the version of the app and link to the Release Notes. By navigating to the App menu (top right corner – indicating by ellipses), a user can click on the “I About’ option.

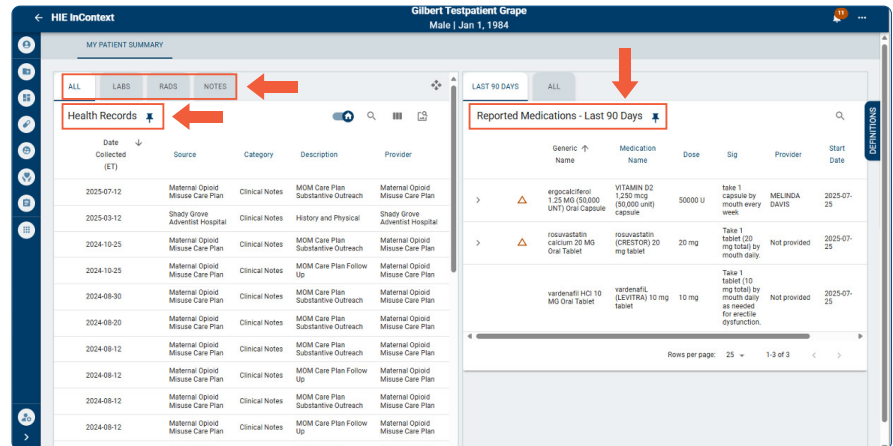
14 My Patient Summary



» My Patient Summary is a customizable landing page that allows users to find the information they need more quickly without clicking into multiple tabs.

Users can:

- **Pin** and unpin tables
- **Size** their window
- **Set** the tab as their landing page
- **Pin** a max of 8 tables
- **Reorder** their pinned tabs using the 4 arrow button on the top right of a pinned tab.

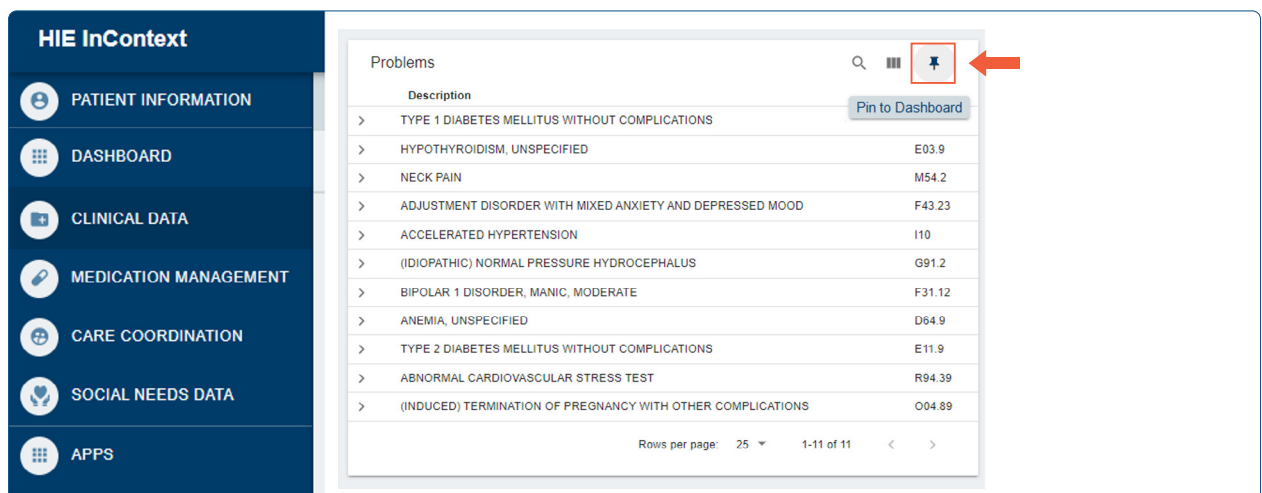


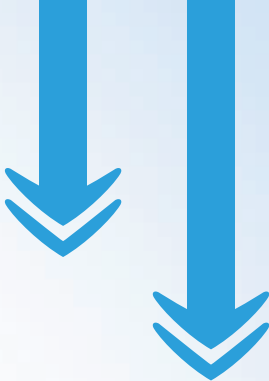
My Patient Summary is a personalized space to centralize all essential information in one location.

Follow these steps for customization:

- 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 unpin icon next to the subtab name or from your view within My Patient Summary

Use steps 2 and 3 to create a dashboard made for your workflow.





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