

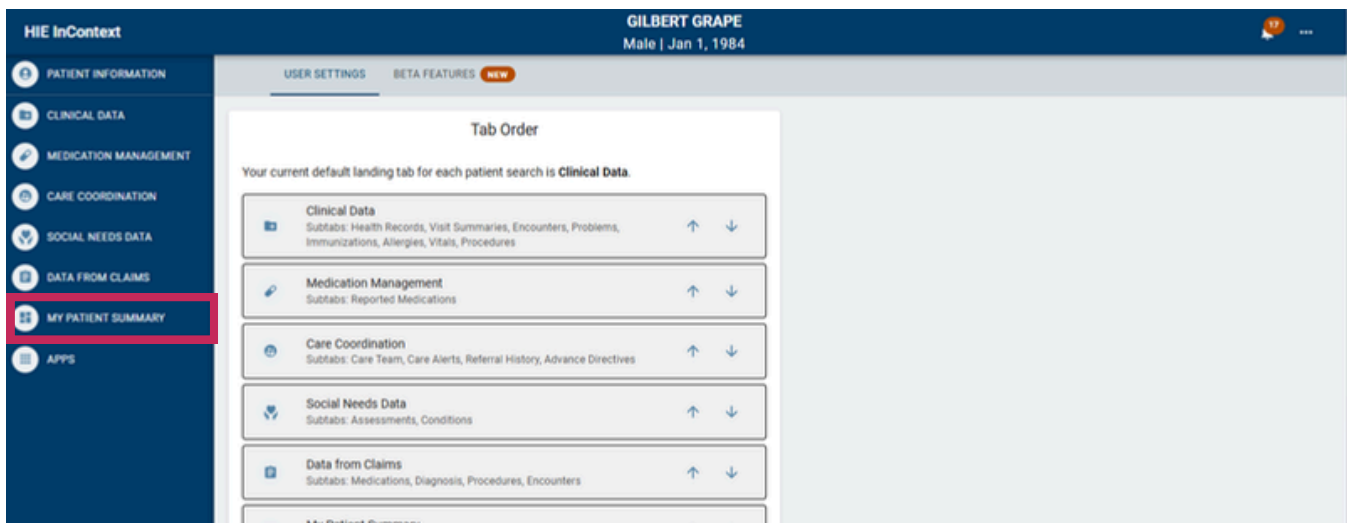
My Patient Summary User Guide

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.

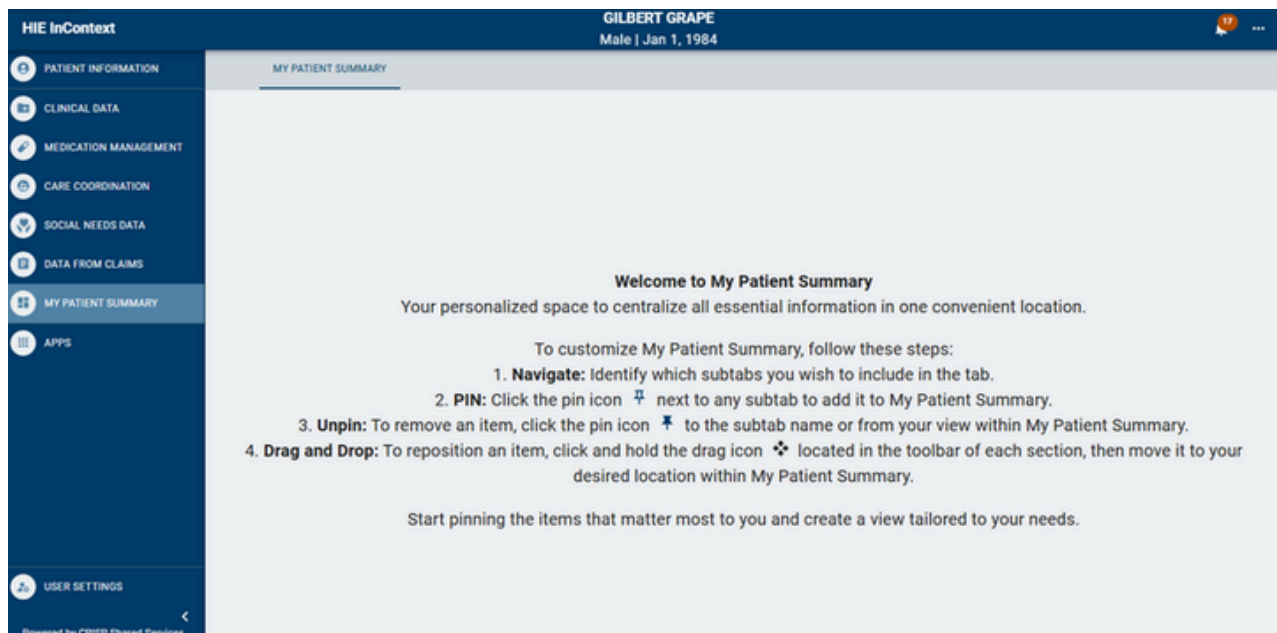
How to Access

Available through both the web-based portal and EHR application, My Patient Summary can be found on the left side panel of InContext.



Set Up

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

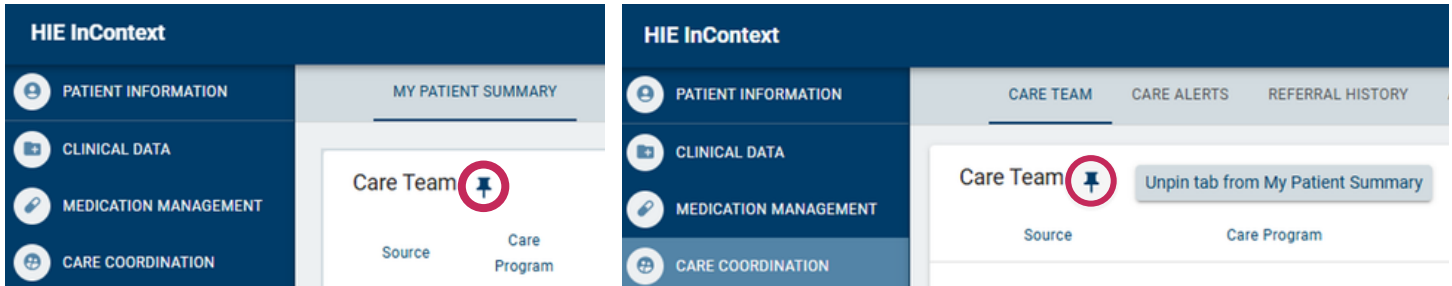


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Customization: Pinning and Un-pinning Tabs

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.

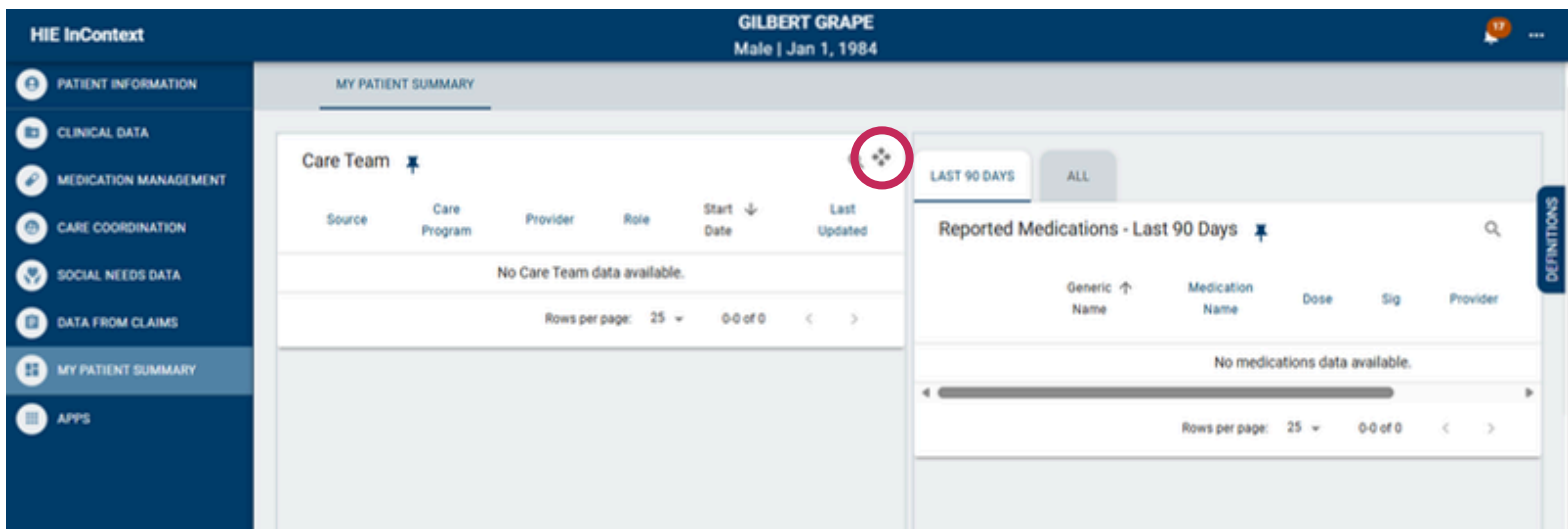
Once clicked, the pin icon becomes solid blue (color filled), and users will find that specific tab/subtab displayed in the My Patient Summary dashboard.



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.

Enhanced Customization: Re-Ordering Pinned Tabs/Subtabs

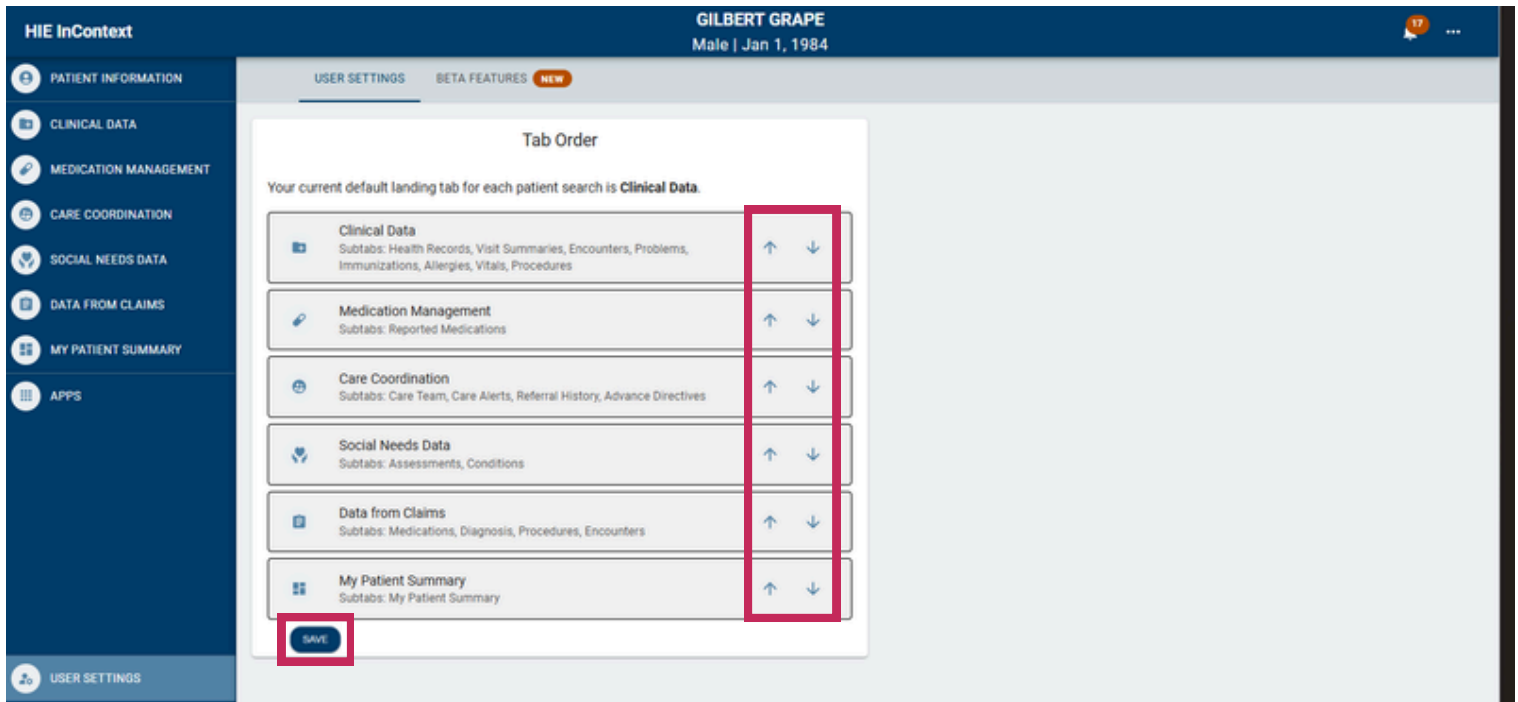
To reorder pinned tabs within My Patient Summary in order of preference, the reorder button can be found on the top right of each quadrant/table. Clicking on the button and dragging the table will allow users to arrange the order of pinned tabs/subtabs as they wish.



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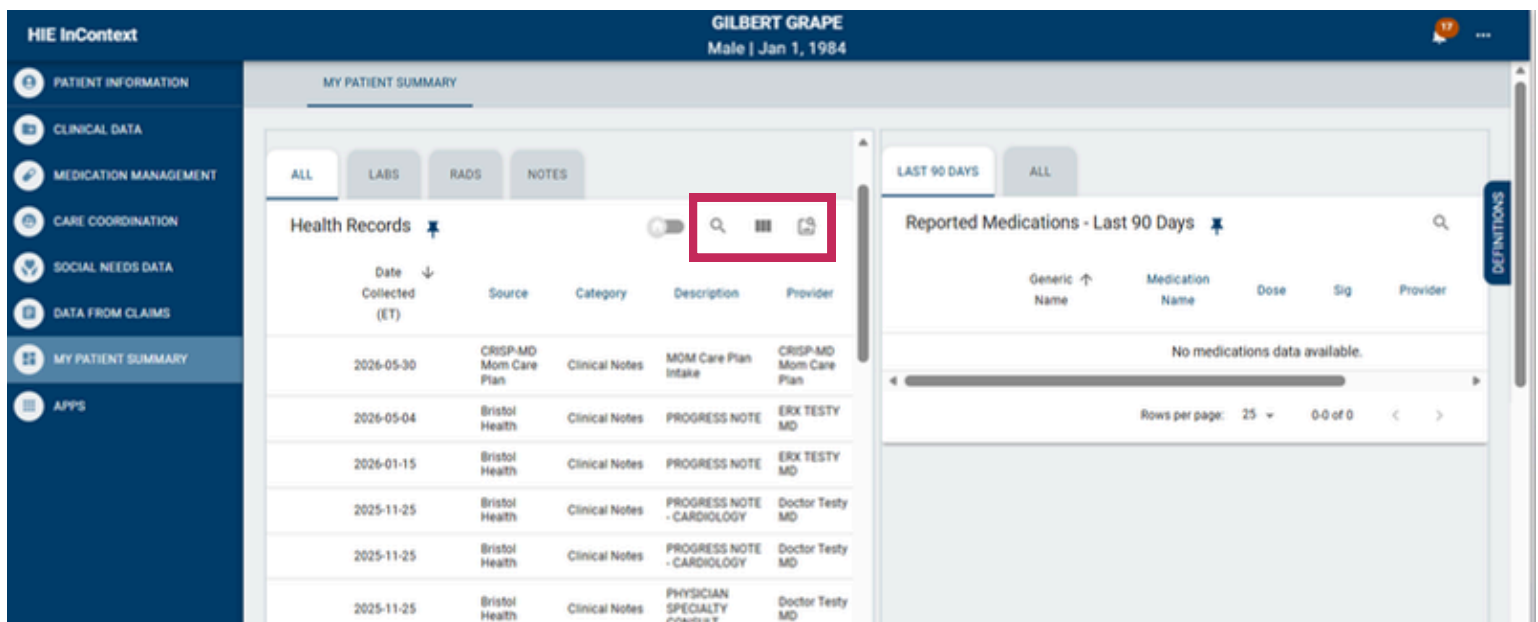
How to Set as Landing Page:

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:

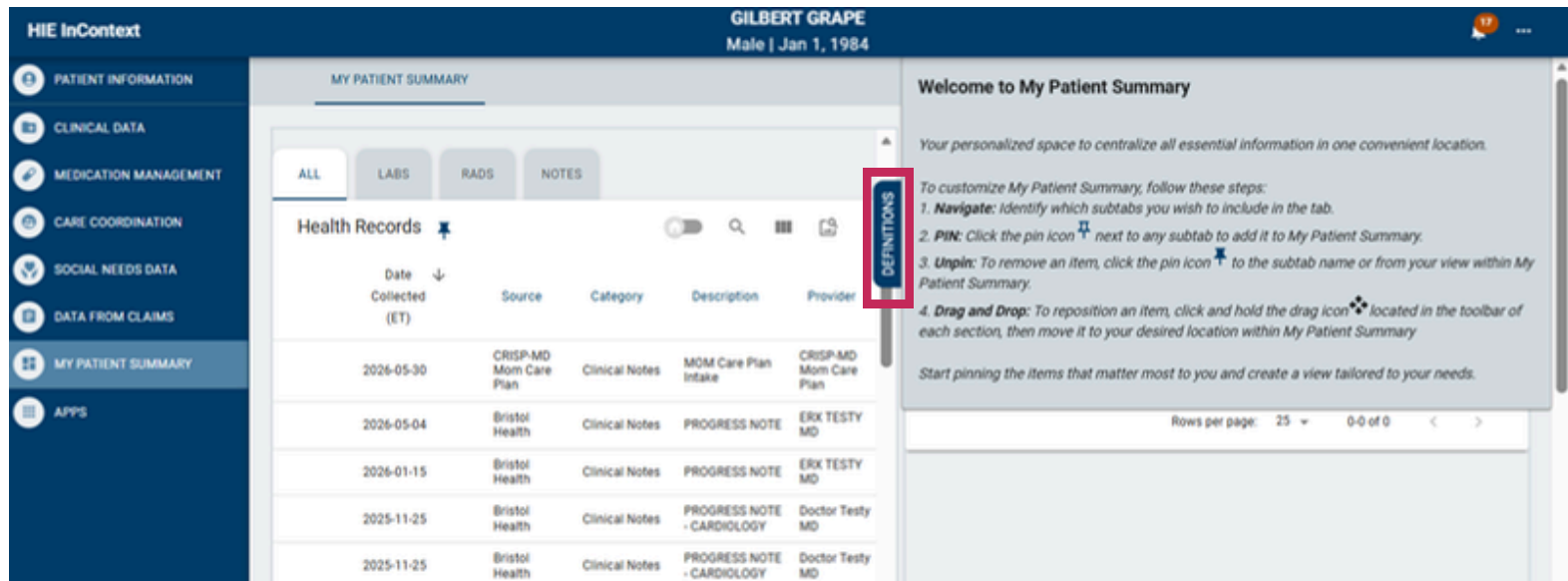
Users are also able to use the search, filter and hide My Organization Data features on a specific pinned tab/subtab. These can be found in the top right corner.



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Easy to 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 HIE InContext dashboard for a patient named GILBERT GRAPE, Male, born Jan 1, 1984. The left sidebar contains navigation links: PATIENT INFORMATION, CLINICAL DATA, MEDICATION MANAGEMENT, CARE COORDINATION, SOCIAL NEEDS DATA, DATA FROM CLAIMS, MY PATIENT SUMMARY (highlighted), and APPS. The main content area is titled 'MY PATIENT SUMMARY' and features tabs for ALL, LABS, RADS, and NOTES. The 'ALL' tab is active, displaying a table of Health Records. A red box highlights the 'DEFINITIONS' drawer in the top right corner, which contains instructions for customizing the My Patient Summary view.

Health Records

Date Collected (ET)	Source	Category	Description	Provider
2026-05-30	CRISP-MD Mom Care Plan	Clinical Notes	MOM Care Plan Intake	CRISP-MD Mom Care Plan
2026-05-04	Bristol Health	Clinical Notes	PROGRESS NOTE	ERX TESTY MD
2026-01-15	Bristol Health	Clinical Notes	PROGRESS NOTE	ERX TESTY MD
2025-11-25	Bristol Health	Clinical Notes	PROGRESS NOTE - CARDIOLOGY	Doctor Testy MD
2025-11-25	Bristol Health	Clinical Notes	PROGRESS NOTE - CARDIOLOGY	Doctor Testy MD

DEFINITIONS

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:

- Navigate:** Identify which subtabs you wish to include in the tab.
- PIN:** Click the pin icon next to any subtab to add it to My Patient Summary.
- Unpin:** To remove an item, click the pin icon to the subtab name or from your view within My Patient Summary.
- 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.

Rows per page: 25 0-0 of 0

Additional Questions or Need Support?

Contact the CRISP DC Outreach team via email at dcoutreach@crispdc.org.