Administrator’s Guide

PatientKeeper®

Configuring Dashboards and Reports

Part Number: CONFIGDASHBOARDSRRAG92022506092022

Contents

1

Configuration Overview for Dashboards and Reports

Revenue Reports mode is designed to improve several aspects of the design and usability of PatientKeeper software while maintaining the overall design and organization of previous versions (known as the "Physician Portal"). From the clinician's perspective, key functional areas (such as the module links organized in the center pane) remain unchanged so that clinicians familiar with the Physician Portal can transition to the new version with ease.

For administrators familiar with previous versions of PatientKeeper software, a few essential concepts are key to understanding how Revenue Reports differs from previous versions. First, **Patient Dashboards** are the screens on the **Patients** tab that clinicians use to accomplish their work. Dashboards organize demographic or charge data in a specific way so that clinicians can complete a particular workflow. Second, **reports and other dashboards** are customizable screens on other tabs that are used by either clinicians or administrators to enter and manage visits or charges, to view links to helpful resources, or to open external web pages. This document uses the term "screen" to collectively describe both dashboards and reports.

Last, **gadgets** serve as the "building blocks" that define a screen. Gadgets are smaller sections within a dashboard or report that you can combine in various ways to define which data is displayed, as well as how it is laid out on the screen. A complete library of supported gadgets can be found in the *PatientKeeper Gadget Help*. When creating or editing a dashboard or report, you can click the **Help** button in the upper right corner of the create/edit screen to access the same *PatientKeeper Gadget Help* system.

This document provides an overview for configuring the screens in Revenue Reports. The key areas covered by this document include the following:

- Administration tasks overview
- Creating and managing screens, including placement of gadgets
- Editing screens
- Configuring patient indicators and user alerts

This chapter provides a very basic overview of the Revenue Reports so that administrators familiar with earlier versions of PatientKeeper software can learn the key differences in how to navigate through the new administrative user interface and begin configuring the system with a minimum of effort.

Creating Administrator Accounts for Revenue Reports

A prerequisite for Revenue Reports administration is the creation of one or more administrative user accounts specifically dedicated to performing tasks from the new Revenue Reports administrative user interface. Configuring Revenue Reports for administrators is a two-fold process that involves creating administrator accounts specifically for use within Revenue Reports and then enabling them to view and modify the Revenue Report screens.

Creating Administrator Accounts

Instead of configuring existing administrators for Revenue Reports administration, you should create new dedicated Revenue Reports administrator user accounts so that Revenue Reports administrators see the correct administration screens when logging into the system. You can create these administrative users by copying preferences from existing administrator user accounts.

To create administrator accounts for Revenue Reports:

1. Log into the system (as a level 0 or 1 administrator).
2. Click the **User** tab, then click the **Add New** button.
3. From the **Create User** window, enter the following data to create the new administrator account(s)
   - **First Name**: The first name of the administrative user.
   - **Last Name**: The last name of the administrative user.
   - **Username**: The administrative user account name. It is recommended that you include information to distinguish this administrator account as pertaining to the new Revenue Reports.
4. From **Clone Preferences from Another User**, navigate to and select the administrative user account to serve as the basis for creating the new Revenue Reports administrative user account.
5. Click **Save**.

Activating Revenue Reports for Administrators

To enable the display of Revenue Reports for administrative users, you must have level 0 or level 1 administrative access.

1. Log into the system (as a level 0 or 1 administrator).
2. Select **Admin** > **User** > [select an administrative user] > **Edit**.
3. Select **Screens** from the left pane.
4. Set **Data View Type** to "Revenue Reports and EPCS Config."
5. Click **Save**.

   The new Revenue Reports mode displays when this administrator logs into the system.

Activating Dashboard Management for Administrators

To enable administrative users to create and edit screens for themselves and for other users, you must have level 0 or level 1 administrative access.

1. Log into the system (as a level 0 or 1 administrator).
2. Select **Admin** > **User** > [select an administrative user] > **Edit**.
3. Select **Screens** from the left pane.
4. Set **Can Create/Copy New Screens** to "Yes, can share with others."
5. Click **Save**.

Overview of Revenue Reports Administration Screens

There are several administration screens that administrators will access on a regular basis to accomplish most tasks:

- **Admin**: The approach for accomplishing many administration tasks is similar to that used in prior releases. Administrators who are accustomed to earlier versions of PatientKeeper software can use the Admin screen to configure their system using a new but familiar administrative user interface. As in the past, the Admin tab is used to configure Institution, Department, User, Facility Group, Location, and System Management settings and options. There are a few settings available on this tab that are applicable to only Revenue Reports mode, and therefore are not available on the **Admin (Classic)** tab below.
- **Admin (Classic)**: The approach for accomplishing many administration tasks remains unchanged in the current release. To facilitate a smooth transition between versions, administrators who are accustomed to earlier versions of PatientKeeper software can use this screen to continue configuring their system using the familiar administrative user interface.
- **Dashboard Management**: Clinicians use Patient Dashboards to view data that is organized in a specific way for accomplishing a specific workflow. Both clinicians and administrators use Reports to enter and manage charges for services. Most Reports are used to manage a specific subset of visits or charges, in order to accomplish a specific goal (for example, entering charges for not coded visits, or reviewing charges that are held for review). The **Dashboard Management** screen allows administrators to configure the content and layout of both dashboards and reports.

- **Gadget Admin**: Gadgets are the building blocks for organizing and displaying data within dashboards and reports. Authorized administrators can use the Gadget Admin screen to copy, organize, customize, and change the core definition of gadgets. For more information, see *Configuring Gadgets*.

Administrators are also expected to make extensive use of the **Patients** screen, since this screen also serves as an access point for many administrative tasks that are specific to the Revenue Reports mode, such as creating, editing, and managing dashboards.

For more information, see *Editing Dashboards and Reports* and *Creating Dashboards and Reports*.

2

Creating Dashboards and Reports

Several dashboards and reports are included with Revenue Reports by default. These default dashboards and reports are designed to be used in some of the more common clinician and administrative workflows. Administrators or end users can create dashboards and reports by copying the default screens to create new ones and then modify them to suit your site's specific needs and workflows (see *Editing Dashboards and Reports*). Or if you prefer, this chapter reviews how to create a dashboard or report that is altogether new, based on a specific screen type. This document uses the term "screen" to collectively describe both dashboards and reports.

Understanding Screen Types

There are several different types of screens, each of which is used for a specific purpose or workflow. The various screen types also contain different categories of data, such as visit data, charge data, problem list data, and so on.

- The screens below (commonly referred to as "dashboards") are used in all systems:
  - **Administrative Dashboard** and **General Dashboard**: These dashboards are typically used to provide links to other systems such as medical reference libraries, and so on. They allow a limited set of gadgets.

- **Patient Dashboard**: These dashboards are available from the **Dashboard Selector** on the **Patients** tab. For a single patient, they show a summary of a specific type of data (for example, problems, documentation, or charges).
- **Web Integration**: These screens support embedding an external web page onto a tab in the PatientKeeper application.

NOTE: Although the option to create **Patient List Dashboards** is present in the application, they are not supported and should not be used.

- These screens (commonly referred to as "reports") are typically only used in organizations where Charge Capture has been implemented:
  - **Calendar Report**: These reports show visit data in a calendar format. They are typically defined to allow users to view the report in a MONTH, WEEK, DAY, or LIST format. The report can also show the charge status for a particular visit day.
  - **Cross-Tab Report**: These reports show visit data in a grid format, with each row representing a visit, and each cell in the row representing a series of seven sequential visit days, from left to right. The report can also show the charge status for a particular visit day.
  - **Drill Down Detail Report**: These reports are used in conjunction with Summary Reports. When a user clicks on a item on a Summary Report to drill down, this is the report format that is then displayed.
  - **List Report**: These reports display visits or charge transactions in a series of rows, each of which may have a checkbox on the left side so that the user can select it in order to take an action on it.
  - **Summary Report**: These reports summarize charge information into various numeric totals. You can typically click on a number to drill down to the specific charge transactions that make up that total, which are then displayed in a list format.

Creating New Screens

Administrators or end users can create dashboards and reports by either a) copying and modifying an existing screen or by b) creating a dashboard or report that is altogether new, based on a specific screen type.

NOTE: The default patient header that is shown at the top of all Patient Dashboards is configured via a different option from all other dashboards and reports; see *Configuring the Default Patient Header* for instructions.

A user's ability to create or copy a screen is based on the setting below:

Admin - User - Screens - **Can Create/Copy New Screens**

Creating a Screen by Copying an Existing One

Often, you are going to want to copy from an existing dashboard or report in order to create a new one. As you become familiar with the product, you are advised to create new screens from the default screens so that you can experiment with test copies. This approach lets you compare any revisions with the original screen definitions so that you can easily revert back to the defaults if needed.

1. Open the dashboard or screen that you want to copy so that you are currently viewing it:

- For Patient Dashboards: Select the **Patients** tab, select the desired Patient Dashboard from Dashboard Selector.
- For all other Dashboards or Reports: Select the desired tab from the navigation bar.

2. Click the **More** icon in the navigation bar at the top right, and select **Copy Dashboard**.

   The Copy [screen type: screen name] screen opens, with the **Overview** tab shown by default.
3. On the **Overview** tab, modify the name and description (which will have been copied) to reflect the new screen.
4. Navigate among the tabs and make the desired changes to the screen configuration. The configurations from the source screen are defaulted for you on each tab of the newly created screen. Each type of dashboard or report has different tabs available for defining the screen, although some tabs are used for all screen types (for example, the **Overview**, **Access**, and **Summary** tabs).

   For instructions on how to define the information on each tab, see:

   - *Configuring the Screen Name and Description*
   - *Configuring the Source Data for a Screen*
   - *Configuring the Criteria for a Screen*
   - *Configuring the Run-time Filters Available on a Screen*
   - *Configuring the Display Gadgets for a Screen*
   - *Configuring the Actions Available on a Screen*
   - *Configuring User Access to a Screen*
   - *Configuring Settings for Web Integrations*

   At any time, you can click the **Help** button in the upper right corner of the create/edit screen to get help on any of the gadgets that you might want to use on your dashboard or report.
5. (Optional) To review all of the details of your new screen at a glance, click the **Summary** tab (see *Using the Summary Tab*).
6. Click **Create**.

   Your new screen is created and can be immediately viewed by end users with view permissions.

Creating Screens from Dashboard Management

If no existing dashboard or report is suitable as the basis for creating a new screen, you can create new screens entirely from scratch, basing it on one of several screen types, as described in *Understanding Screen Types*.

Configuring dashboards or reports by screen type is quite similar to creating screens by copying an existing one, except that the Name and Description fields on the **Overview** tab are blank, and all of the other tabs are blank as well, with nothing predefined as a starting point. However, the same tabs are available for naming and describing the dashboard, defining access policies, adding and configuring run-time filters or gadgets, and so on.

1. Select the **Dashboard Management** tab.
2. Click **Add** in the top right corner of the screen.
3. Select a screen type. For example, Patient Dashboard.

4. From the Create [Screen Type] screen, navigate among the tabs to complete your screen configuration. Each type of dashboard or report has different tabs available for defining the screen, although some tabs are used for all screen types (for example, the **Overview**, **Access**, and **Summary** tabs).

   For instructions on how to define the information on each tab, see:

   – *Configuring the Screen Name and Description*
   – *Configuring the Source Data for a Screen*
   – *Configuring the Criteria for a Screen*
   – *Configuring the Run-time Filters Available on a Screen*
   – *Configuring the Display Gadgets for a Screen*
   – *Configuring the Actions Available on a Screen*
   – *Configuring User Access to a Screen*
   – *Configuring Settings for Web Integrations*

   At any time, you can click the **Help** button in the upper right corner of the create/edit screen to get help on any of the gadgets that you might want to use on your dashboard or report.

5. (Optional) To review all of the details of your new screen at a glance, click the **Summary** tab (see *Using the Summary Tab*).
6. Click **Create**.

   Your new screen is created and can be immediately viewed by end users with view permissions.

Configuring the Default Patient Header

Use the **Edit Default Patient Header** setting to configure the information that is included in the standard patient header that is displayed after an end-user selects a patient. The patient header contains basic identifying information about the patient and helps the end-user confirm that they have selected the correct patient. It is displayed at the top of the **Patients** tab when the end-user is viewing a Patient Dashboard for an individual patient.

In newly installed systems, the patient header contains the following information by default: Patient Name, Date of Birth, Age, Gender, and MRN. You can add or remove gadgets to/from the patient header to suit your organization's needs. Any changes you make affect all end-users on all screens where the patient header is used.

1. Select **Admin > Institution > Screens > Edit Default Patient Header >** Edit.

   The Edit Patient Header: Edit Header screen is displayed, and the **Display** tab is automatically selected. By default, the patient header is composed of a single cell in the display grid that contains the following gadgets: Patient Name, Date of Birth, Age, Gender, and MRN.

2. Review the currently selected gadgets and determine whether you want to modify or delete any of them:

   – To modify a gadget's properties for just the patient header, hover your mouse cursor over the gadget and click **Edit**.
   – To remove a gadget from the patient header, hover your mouse cursor over the gadget and click **Delete**.

3. To add a new gadget to the patient header, follow the steps in *Adding Gadgets to a Screen*, starting at Step 3 on page 14.
4. To change how a gadget is positioned within the display grid for the patient header, see *Defining Gadget Positioning within a Screen*, starting at Step 3 on page 16.
5. Click the **Preview** tab to see a realistic preview of how the patient header will look to the end user.
6. (Optional) To undo your changes, click the **RESET** button on the **Preview** tab. The patient header resets back to the default format as described in the introduction above.
7. Click **Save** when done.

Configuring the Screen Name and Description

Screen types where the **Overview** tab is available: All screen types.

Use the **Overview** tab to identify and describe the screen, by completing the following fields:

- **Name**: Enter a name for the screen.
  - For Patient Dashboards: This is the name that users will see when they click the **Dashboard Selector** on the **Patients** tab.
  - For all other screens: After clicking the **Open a Screen** button in the top navigation bar, this is the name they will see in the THUMBNAILS or LIST VIEW that shows all of the unopened screens. The **Name** will also be used as the tab name, so strive to keep it short and concise.
- **Description**: Enter a full description for the screen.
  - For Patient Dashboards: This information will display if the user hovers over an item in the **Dashboard Selector** on the **Patients** tab.
  - For all other screens: After clicking the **Open a Screen** button in the top navigation bar, this is the information they will see if they hover over the screen name in the THUMBNAILS view. In LIST VIEW it is displayed as a column in the table of screens. The **Description** will also show if the user hovers over the tab name.
- **Supported platforms**: This setting is not yet implemented; only the Portal platform is currently supported.

Configuring the Source Data for a Screen

Screen types where the **Source Data** tab is available:

- Calendar Report
- Cross-Tab Report
- Drill Down Detail Report
- List Report
- Summary Report

The **Source Data** tab allows you to specify which data sets the system should use as a source when retrieving the report results, such as such as coded charges, non-coded charges, visits, and so on.

1. Start the process for creating a new screen or editing an existing screen as described in:

- *Creating a Screen by Copying an Existing One*
- *Creating Screens from Dashboard Management*
- *Editing a Screen*

2. Click the **Source Data** tab.
3. Select the source(s) of data that should be used for the report. Each of the possible sources show a definition describing the type of data that it encompasses. The available sources depend on the type of report--not all sources are available for all report types. There are several considerations you should keep in mind when selecting data sources:
   - Although you may select more than one data source, in some cases, selecting one source may render other sources unavailable for selection.
   - As a general rule, you should select only the data sources that are necessary, since the more sources you use, the larger the data set the report must sift through when retrieving the report results.
   - The sources you select on this tab affect the data fields that are available for selection on the **Criteria**, **Run-time Filters**, and **Result Display Fields** tabs.
   - There are several categories of data:
     - **Coded**: This data source returns charge transactions.
     - **Non Coded**: This data source returns visit dates that do not have charge transactions entered against them. (This source should not be used for Drill Down Detail reports.)
     - **Deleted**: This data source returns deleted charge transactions. (This source should not be used for Drill Down Detail reports.)
     - **Visit**: This data source returns coded and non-coded visits. (This source should not be used for Drill Down Detail reports.)

You can configure a report to have more than one source, such as Coded and Non Coded. If you also configure it to have Criteria or Run-Time filters, and the criteria/filter is applicable to only one of those data sources, then it is only applied to that one data source. In our example, if there was a Run-Time Filter of Billing Provider, and the user running the report selected a specific provider, the report would find all charges (from the Coded source) that had the selected Billing Provider. But all non coded visits (for any provider) would also show on the report, because non coded visits do not have a Billing Provider associated with them.

Configuring the Criteria for a Screen

Screen types where the **Criteria** tab is available:

- Calendar Report
- Cross-Tab Report
- List Report
- Summary Report

Use this tab to define specific search criteria for each of the data sources that you selected on the **Source** tab. You are not required to select any criteria at all, but leaving this tab blank means that all results from the source will be returned, which will impact report performance. For example, you might specify that only certain visit types be returned, or only visits in a certain facility, or only charges with a certain charge location (*Draft*, *Holding Bin*, *Outbox*, or *Sent to Billing*).

1. Start the process for creating a new screen or editing an existing screen as described in:
   - *Creating a Screen by Copying an Existing One*
   - *Creating Screens from Dashboard Management*
   - *Editing a Screen*
2. Click the **Criteria** tab.

   A **Fields** drop-down is displayed on the left side of the screen, and the sources that you selected on the **Source** tab are listed on the right side of the screen.
3. In the **Fields** drop-down, search for a criteria field, such as Location, Visit Type, or Charge Location. See the *PatientKeeper Gadget Help* for definitions of the gadgets that are available to be used as criteria fields.

   The criteria field is added to each of the sources where it can be used, and a dialog opens showing you the possible values for that criteria field.
4. Select one or more values for the criteria field and then click **Add** to add the criteria to the source (the **Add** button is located at the bottom right of the dialog, you may need to scroll down to see it). Or, if you do not want to use the criteria for a particular source, click **Cancel** .
5. Repeat steps 3 and 4 until you have selected all of the criteria you want to use for each source. You can add the same criteria field more than once for a given source, each with a different value, in order to achieve a specific logic statement (see Step 6 for more information).
   - You can delete a criteria field that was entered in error by clicking **Delete** .
   - You can change the values that you selected for a criteria field by clicking **Edit** .
6. (Optional) If you added more than one criteria field for a source, you can modify the logic that is used for those criteria. By default, all of the criteria fields used for a given source are AND'ed together. To change it, click the **Edit Logic** button and then modify it as necessary. You can use AND, OR, and parenthesis in your statement, such as "(1 AND 2) OR (3 AND 4)."

Configuring the Run-time Filters Available on a Screen

Screen types where the **Run-Time Filters** tab is available:

- Calendar Report
- Cross-Tab Report
- List Report
- Summary Report

Run-Time Filters are the filter options that are seen in the left pane of a Report. They allow the user to filter the list of results down to a more concise list. Adding filters to a Report definition makes it more flexible for a given user, and also allows a wider audience of users to take advantage of the same Report. For example, you can define a Report that gathers basic charge or visit data, with standard set of display columns, and then add run-time filters that allow each user to filter the results to the specific set of charges or visits that interest them.

1. Start the process for creating a new screen or editing an existing screen as described in:
   - *Creating a Screen by Copying an Existing One*
   - *Creating Screens from Dashboard Management*
   - *Editing a Screen*
2. Click the **Run-Time Filters** tab.

   A **Filters** drop-down is displayed on the left side of the screen, and a work area for displaying the selected filters is shown on the right side of the screen.
3. In the **Filters** drop-down, search for a filter field, such as Visit Date or Billing Provider. See *PatientKeeper Gadget Help* for definitions of the gadgets that are available to be used as Run-time Filters.

   The filter field is added to the right side of the screen. By default, when an end user clicks on this filter, they will be able to select any of the available values for the field, and no value will be automatically selected as a default.
4. (Optional) Modify the filter as necessary:

   a. Hover your mouse cursor over the filter row and then click **Edit** .

   b. Make any of the following changes:

   - **Label**: Change the label that will be displayed to the end user for this filter.
   - **Type**: Change the type of filter:
     - **Checkbox**: Shows as a checkbox option, which allows the user to turn the filter on (checked) or off (not checked).
     - **Dropdown**: Show a s a drop-down list, and allows the user to select only one value from it.
     - **Dropdown with multiselect**: Show a s a drop-down list, and allows the user to one or more values from it.
     - **Hierarchy**: Shows a list of choices in a hierarchy format (for example, a run-time filter for Visit Location shows in a hierarchy format of Facility, with Nursing Units under each Facility).
     - **Radio**: Shows as a radio button option with choices of Yes or No, which allows the user to turn the filter on (Yes) or off (No).
     - **Search**: Allows the user to search for and select one or more values. For example, a run-time filter for Charge Code allows the user to search for and select one or more specific charge codes.
     - **Switch**: Shows as an on/off switch, which allows the user to turn the filter on (the switch is ON) or off (the switch is OFF).
   - **Available Values**: By default, all available values are shown to the user, but you can limit the list to just a subset. Select the values that you want the user to see.
   - **Default Value**: You can specify that a value be already selected for the user by default (although they can still change it). Select a default value if desired.

   c. Click **Save** to save your changes to the filter.
5. Repeat steps 3 and 4 until you have selected all of the run-time filters that you want to make available on the screen.

– By default, the filters will be listed on the screen in the same order that you selected them. To change the vertical order in which the filters are listed, just click on any filter row and drag and drop it into the desired position.

– You can delete a filter that was added in error by clicking **Delete** .

– You can change the values that you selected for a filter by clicking **Edit** .

Configuring the Display Gadgets for a Screen

Screen types where the **Display** or **Result Display Fields** tab is available:

- Administrative Dashboard
- General Dashboard
- Calendar Report
- Cross-Tab Report
- Drill Down Detail Report
- List Report
- Patient Dashboard
- Summary Report

The **Display** tab (for dashboards) and the **Result Display Fields** tab (for reports) are used to configure the location and layout of gadgets on screens. Both of these tabs behave in a similar manner--they show how a screen is structured in relation to the gadgets belonging to it.

You can filter by gadget category to search for and select any available gadget from the left-hand side of the **Display** or the **Result Display Fields** tab. The positioning of gadgets within the dashboard or report is shown on the right-hand side of the screen, where you can add, remove, and organize all of the gadgets that define the particular screen.

Once you add a gadget to a screen, you can configure any of the properties of the gadget that are specific to that screen. Note that gadget properties are defined with default values that are considered to be clinically relevant in order to minimize the need to make a lot of initial configuration changes.

However, gadget properties are designed to be flexible, since it is expected that you will sometimes need to configure gadgets to achieve specific results within a particular screen. For example, you might want to configure the **Problem List** gadget to display only active problems by enabling the **Show Active Only** property.

Gadget properties vary widely by gadget, and cover a broad range from the very simple (such as gadget labels) to the more complex (such as the **Click Action Row** property of list gadgets). For definitions of all supported gadgets, the screen types and data sources where each is available, as well as the properties that are available for each, see the *PatientKeeper Gadget Help*.

While gadgets are designed to be configured with some flexibility, you might sometimes need to make changes to the gadget that extend beyond a single dashboard or report, instead affecting gadget behavior across a variety of screens. This type of configuration requires changes to the default properties of a gadget. For more information, see *Configuring Gadget Definitions*.

Adding Gadgets to a Screen

To add a gadget to a screen:

1. Start the process for creating a new screen or editing an existing screen as described in:
   - *Creating a Screen by Copying an Existing One*
   - *Creating Screens from Dashboard Management*
   - *Editing a Screen*
2. Click the **Display** tab (for dashboards) or the **Result Display Fields** tab (for reports).
3. From within the Gadget Gallery on the left side of the screen, scroll down until you find the gadget you want, or click into the **Search** field and search for it. See *PatientKeeper Gadget Help* for definitions of the gadgets that are available to be used as Display or Result Display Fields.
4. Use either of the methods below to place the gadget in the desired location in the display grid on the right side of the screen as follows:
   - Drag the gadget from the Gadget Gallery on the left side and drop it into the desired cell in the display grid on the right side.
   - Hover your mouse cursor over the gadget in the gallery and click **Add** ⊕. When using this method, the application automatically places the gadget onto the display grid as described below. However, you can always drag and drop a gadget into a new position, if you don't like where it was placed.
     - On Patient Dashboards, the first and all subsequent gadgets are added to the top left cell of the display grid.
     - On List, Calendar, and Drill Down Detail screens, the first gadget is added to the first column, and each subsequent gadget is placed in a new column to the right. These screens allow you to select more than one source, such as Coded and Non Coded. If you do select more than one source, then the display grid will show a row for each source. When you add a gadget, it is added to both rows, if the gadget is applicable for both sources. For example, **Patient Name** would be added to both the Coded and Non Coded rows, but **Charge Code** would be added to only the Coded row.
     - On Summary reports, the first column is reserved for defining the item by which the totals will be calculated and summarized. It contains a drop-down list with acceptable values-- you must select one item from this list. Any gadgets that you add are then placed in the second and subsequent columns. For example, when creating a Charge Age report, you might select **Billing Department** from the drop-down list for the first column, and then add the **# of Charges by Age** gadget to the next several columns (with each one defined for a different aging bucket, such as 0 to 30 days, 31 - 60 days, and so on). The resulting report will then display the number of charges in each age bucket, summarized for each Billing Department (in other words, with a row for each Billing Department).
     - On Cross-Tab reports, visit data is displayed in a grid format, with each row representing a visit, and each cell on the right side of the report representing a series of seven sequential visit days, from left to right. When defining this type of report, the first gadget is added to the first column, and each subsequent gadget is placed in a new column to the right. You may define as many columns as you want, but you must place the **Charge Status** gadget in the *last* column, as this is what will be shown in the seven visit day cells. For example, you might define a report where the first three columns show gadgets that identify the patient or visit, and the last column shows

Charge Status (which results in the seven visit day columns each showing the charge status for that day).

5. (Optional) For screens that have columns (Cross-Tab, Drill Down Detail, List, and Summary), you can modify the column heading label that the end-user sees when using the report. By default, the gadget name is used as the column heading label. To change it, click into the column heading cell in the display grid and then edit the column heading label as desired.
6. (Optional) To modify a gadget's properties for just this screen, hover your mouse cursor over the gadget you just added to the display grid and click **Edit** .

   Note that simpler gadgets (such as some of the demographic gadgets) do not provide editing options, as they have no configurable properties.

   The gadget is added to the screen definition.

Related topics:

Defining Gadget Positioning within a Screen

Removing Gadgets from a Screen

Additional Display Options for Specific Screen Types

Removing Gadgets from a Screen

While creating or editing a dashboard or screen, you may find that you want to remove a gadget that is no longer needed, or that you added in error.

1. Start the process for creating a new screen or editing an existing screen as described in:
   - *Creating a Screen by Copying an Existing One*
   - *Creating Screens from Dashboard Management*
   - *Editing a Screen*
2. Click the **Display** tab (for dashboards) or the **Result Display Fields** tab (for reports).

   The **Gadget Gallery** displays a summary view to show how all gadgets are organized within the selected dashboard.
3. Hover your mouse cursor over the gadget you want to remove and click the **Delete** icon .

   The gadget is removed from the dashboard definition.

Related topics:

Defining Gadget Positioning within a Screen

Adding Gadgets to a Screen

Additional Display Options for Specific Screen Types

Defining Gadget Positioning within a Screen

Any user(s) with permission to edit a dashboard or report can define how gadgets are organized within any screen by default. You should define a gadget layout that your site determines to be the best starting point for the majority of your users, but note that users might modify this layout for their own specific usage.

Before re-positioning gadgets within your screens, you are advised to carefully plan how you want to manage your screens, because once you save the default screens after repositioning gadgets, your change becomes a permanent change to the default screen definition.

For this reason, you should initially start by copying from a default screen and using a test version to begin repositioning gadgets. This approach lets you compare your revisions with the original dashboard definition so that you can easily revert back to the default if needed.

1. Start the process for creating a new screen or editing an existing screen as described in:
   - *Creating a Screen by Copying an Existing One*
   - *Creating Screens from Dashboard Management*
   - *Editing a Screen*
2. Click the **Display** tab (for dashboards) or the **Result Display Fields** tab (for reports).

   The display grid for the selected screen shows a summary to illustrate how all of its gadgets are organized.
3. Use the drag and drop method to organize gadgets in the display grid.
4. (Optional) Use any of these additional tools to modify the gadget layout:
   - Click the **Display Grid** icon in the upper-right corner of any cell to use the following layout configuration options:
     - **Delete Row**: Removes the selected row and any cells that are contained within it. Note that cells in a row are removed whether or not they contain gadgets (they do not need to be empty).
     - **Delete Col**: Removes the selected column and any cells that are contained within it. Note that cells in a column are removed whether or not they contain gadgets.
     - **Merge Right**: Combines the selected cell with the cell to the right of it.
     - **Unmerge Left**: Divides a single cell into two distinct, horizontally-aligned cells.
     - **Merge Down**: Combines the selected cell with the cell below it.
     - **Unmerge Up**: Divides a single cell into two distinct, vertically-aligned cells.
   - To create a new row or column, drag a gadget onto the line between two columns or rows. You will see text prompting you to drop the gadget to create a new row or column.
   - On reports (as opposed to dashboards), if you click anywhere in a column's cell in the display grid, another mini-grid with three rows and three columns opens. This mini-grid has the same the **Display Grid** icon in the upper-right corner of each cell. The mini-grid allows you to position multiple gadgets in a column, and organize them as desired (one above another, side-by-side, and so on). For example, you might want the first column of your report to contain patient information, such as the patient's name, current location, MRN, and account number. You can use the mini-grid to position all of these items as desired in a single column of the report.

   The dashboard or report is updated with your changes to gadget positioning.

Related topics:

Adding Gadgets to a Screen

Removing Gadgets from a Screen

Additional Display Options for Specific Screen Types

Distributing Gadget Definition Updates to All Users

Several methods are used to ensure that updates to a gadget's definition are propagated out to all users so that users do not continue to use an outdated gadget (including older versions retained in their cache). Each time that users open a screen in Revenue Reports, the system automatically checks whether any of the gadgets used by the screen have been updated and any newer versions are loaded in place of the previous version.

Authorized administrators also have the option to force a more recent gadget version to be propagated out to users by clicking the Clear Local Gadget Plugin Caches button in the header of the Gadget Admin screen, which replaces any older versions found in a user's cache with the most recent gadget version.

Additional Display Options for Specific Screen Types

Certain screen types have additional options on the **Display** tab (for dashboards) or the **Result Display Fields** tab (for reports). These options typically affect overall layout or sorting for the screen.

- **Calendar Report**: There are several setting available at the bottom of the **Result Display Fields** tab.
  - **Date Value**: All Calendar Reports show a calendar widget in the left pane, allowing the user to select the day, week, or month for which they want to see the report results. The calendar widget is always based on the visit date. For example, when a user selects a specific date to display, the report shows the following:
    - For outpatient visits on the selected date, the report displays the appointment at the scheduled time.
    - For inpatient visits that were admitted on the selected date, the report shows the visit starting at the admit time, and continuing until the discharge time or the end of the day (if not discharged that day).
    - For inpatient visits that were admitted on a date other than the selected date, and not yet discharged, the report shows the visit as "all-day."
  - **Time Scale**: This setting defines the size of each time slot when viewing the report in the Day, Week, and List formats.
  - **Available Views**: By default, Calendar Reports allow users to view the report in a Month, Week, Day, or List format. You can allow end users to toggle between all of these different view types, or you can limit them to just a few, by unchecking one or more boxes.
- **Cross-Tab Report**: There are several setting available at the bottom of the **Result Display Fields** tab.
  - **Default Sort**: This setting lets you define how the visit rows should be sorted vertically. You may choose several fields to sort by, so that you can have a primary sort, a secondary sort, and so on. You may only choose items that are currently selected as columns on the report.
  - **Column Ordering**: By default, the report shows seven columns, representing seven days, in ascending order (earliest date on the left, latest date on the right). You can change this to descending order if desired.

- **List Report and Drill Down Detail Report**:
  - A **Default Sort** setting is available at the bottom of the **Result Display Fields** tab. This setting lets you define how the visit or charge rows should be sorted vertically. For example, a common sort might be by Patient Name, in ascending (alphabetical) order. You may choose several fields to sort by, so that you can have a primary sort, a secondary sort, and so on. You may only choose items that are currently selected as columns on the report.
- **Patient Dashboards**:
  - A checkbox to **Hide in Patient Dashboards list** is available at the top of the **Display** tab. Check this box if you do not want the dashboard to show in the Dashboard Selector on the **Patients** tab. This setting is used for dashboards that are intended to only be opened via a click action from a gadget or another dashboard. For example, a given dashboard might contain the Visit History gadget, and it might be configured such that when a user clicks on a visit row, a Visit Detail dashboard opens in a pop-up window. If you did not want the Visit Detail dashboard to be available in the Dashboard Selector as a stand-alone dashboard, you would check the **Hide in Patient Dashboards list** checkbox. Note that this setting should not be confused with the **Who can see this screen setting** on the **Access** tab of the dashboards definition. In our example, a user must still have permission to *view* the Visit Detail dashboard in order for it to open when they click on a visit row in the Visit History dashboard.
- **Summary Report**: There are several settings available at the bottom of the **Result Display Fields** tab that allow you to customize the report format.
  - **Specify a default sort order**. By default, the rows on the resulting report are not listed in any particular order. To add a default sort order:

    a. Click the **Up Arrow/Down Arrow** button to the right of the **Default Sort** field.

    b. In the Default Sort dialog, select a field to sort by. You can choose any of the columns that you currently have defined on the report. Either click into the **Fields** box and start typing a column name to find it, or click the **Up Arrow** to the right of the **Fields** box to view a list of available column names. To add additional sort levels, repeat this step. Once you have selected your sort fields, you can modify them as follows:

      ♦ To change the order of your selected sort fields: Click and hold on the **Grid** icon next to a field, drag the field to a new position, and drop it.

      ♦ To determine whether the report results should sort in ascending or descending order according to the selected sort field, click the **Ascending/Descending** button.

      ♦ To remove a selected sort field, click the **Delete** icon.

    c. Click **Ok**.

    NOTE: Many of the gadgets used on Summary reports are meant to be used more than once on the same report as a Result Display Field. For example, the **# Charges by Age** gadget can be added multiple times, with each instance configured to show a different age range, such as 0-30 days, 31-60 days, and so on. If you want to sort by these columns, you should follow these steps:

    a. Edit each of the gadget's properties and assign a unique **Display Name** to each one, such as "Charges 0-30 days," "Charges 31-60 days," and so on.

    b. Save the entire report and reopen it for editing.

c. Click the **Up Arrow/Down Arrow** button to the right of the **Default Sort** fields and then follow the instructions above to define your sort order.

Taking these steps ensures that you will see the individual columns using their **Display Names** of "Charges 0-30 days," "Charges 31-60 days," etc. in the Default Sort dialog, so that you can clearly identify which columns you want to use for sorting. If you don't assign **Display Names**, then in our example you would instead see the **# Charges by Age** column listed several times (with the same name), making it difficult to distinguish one column from another.

– **Make the first column clickable, so that the user can drill down and view the aggregate totals for any subcategories that make up that column**. This feature is available only when one of these fields have been chosen in the first column: Billing Department, Billing Area, or Facility. For example, if Billing Department is the first column, you can define Billing Area and then Provider as drill-down levels below it. When viewing the report, it will display totals per billing department. The user can then click on any department to see the aggregate totals for the billing areas within that department, and then click on any billing area to see the aggregate totals for any providers who entered charges within that billing area.

a. Select Billing Department, Billing Area, or Facility as the first column.

A drop-down list and an **Add Drilldown Level** button become available just below the **Default Sort** field.

b. Select a field from the drop-down list, and then click **Add Drilldown Level**.

c. If you chose Billing Department as the first column, you can add a second drill-down level by repeating the previous step.

– **Add a grand total at the far right of each row**. Click the **Include Row Totals** checkbox.

– **Add a grand total at the bottom of each column**. Click the **Include Column Totals** checkbox.

Related topics:

Adding Gadgets to a Screen

Removing Gadgets from a Screen

Defining Gadget Positioning within a Screen

Configuring the Actions Available on a Screen

Screen types where the **Actions** tab is available:

- Drill Down Detail Report
- List Report
- Summary Report

The **Actions** tab allows you to add action buttons at the top right of a report. The user can click on a checkbox to the left of a charge row, and then click on an action button at the top right (such as **DELETE**, **HOLD FOR REVIEW**, **SEND TO OUTBOX**, and so on) to take that action against the charge transaction. Or in the case of the **EXPORT** and **PRINT** buttons, they can simply click the action button to export or print the full report results, without first selecting any rows.

1. Start the process for creating a new screen or editing an existing screen as described in:

  - *Creating a Screen by Copying an Existing One*
  - *Creating Screens from Dashboard Management*
  - *Editing a Screen*
2. Click the **Actions** tab.

   A **Search** field with a list of possible actions is displayed on the left side of the screen, and a work area for displaying the selected actions is shown on the right side of the screen.
3. Use the **Search** field to search for an action, or simply click on one from the list.

   The action is added to the right side of the screen.
4. Repeat Step 3 until all of the desired actions have been added.
5. (Optional) Modify the actions as necessary:
   - Reposition the actions from left to right as desired using drag and drop.
   - To change the properties of an action button, hover your mouse cursor over the action and click **Edit** . You can change the **Text Color**, **Font Size**, or **Label** that is displayed to the end user.
   - To delete an action button that was added in error, hover your mouse cursor over the action and click **Delete** .

Configuring User Access to a Screen

Screen types where the **Access** tab is available: All screen types.

Use the **Access** tab to define access rules that are applied per-screen, restricting editing of a particular dashboard or report to a targeted group of users or individual users. A separate configuration lets you restrict who can view a screen to one or more specific users.

Defining Who Can Edit a Screen

By default, newly-created screens are defined with wide-ranging access policies, so you should prioritize defining access restrictions as part of your initial site implementation and deployment work. In the case of editing permissions, the widest possible access policy includes all users (including level 0 - 2 administrators and level 3 users). Level 0 and 1 administrators can always edit screens, whether or not they are explicitly granted edit permissions.

End users also have some control over their report usage, even if they do not have explicit permission to edit a particular report definition, by applying some basic customizations at the time they are viewing a report. For example, all users have the ability to modify the way a report is sorted, change the left-to-right order of the display columns, and add or remove display columns. Any customizations made by an end user do not affect the underlying report definition (only a person with edit permission for a report can edit the report's definition).

> **NOTE:** End users cannot customize a Patient Dashboard unless they have been granted explicit edit permissions.

Therefore, you should carefully consider for which reports or dashboards you wish to extend edit permissions to level 3 users, and only do so if there is a justification for providing more comprehensive edit capabilities.

1. Start the process for creating a new screen or editing an existing screen as described in:

- *Creating a Screen by Copying an Existing One*
- *Creating Screens from Dashboard Management*
- *Editing a Screen*

2. Click the **Access** tab.
3. Under **Who can edit this screen?**, select **Specific**.

   (Additional options let you choose **All Users** (allowing for users of all levels to edit) or **No other users** (editing is restricted to level 1 and 0 administrators, who always have screen edit permissions).
4. A second drop-down menu lets you search for a targeted group of departments, facilities, roles, specialties, or users.

   Note that you can define multiple search criteria to restrict screen editing to multiple targets. For example, you could restrict editing to a specified list of users *and* a specified list of departments.

Defining Who Can View a Screen

This configuration option determines who can view a specific Patient Dashboard on the **Patients** tab, or who can open a specific dashboard or report tab (using the **Open a Screen** button on the navigation bar) to view the screen. You can use this option to restrict the usage of specific dashboards/reports that target a particular specialty or group of users sharing a specific workflow. Level 0 and 1 administrators can always view all screens, whether or not they are explicitly granted view permissions.

Additional options for showing or hiding Patient Dashboards or report tabs for individual users are also available. For more information, see *Managing Dashboards and Navigation Tabs for Users*.

1. Start the process for creating a new screen or editing an existing screen as described in:
   - *Creating a Screen by Copying an Existing One*
   - *Creating Screens from Dashboard Management*
   - *Editing a Screen*
2. Click the **Access** tab.
3. Under **Who can see this screen?**, select **Specific**.

   (Additional options let you choose **All Users** (allowing for users of all levels to view) or **No other users** (viewing is restricted to level 1 and 0 administrators, who always have dashboard view/edit permissions).
4. A second drop-down menu lets you search for a targeted group of departments, facilities, roles, specialties, or users.

   Note that you can define multiple search criteria to restrict screen viewing to multiple targets. For example, you could restrict viewing to a specified list of users *and* a specified list of departments.

Defining User Edit and View Rules for Multiple Dashboards

An additional option lets authorized administrators define user edit and view rules shared by multiple dashboards. To provision dashboards in bulk, administrators can select multiple dashboards on the **Dashboard Management** tab and click the (Update Permissions for Selected Dashboards) icon in the Dashboard Management header. The screen that displays is much the same as the screens for configuring individual users (including the sections

Who can see this screen? and **Who can edit this screen?** as in the previous sections). However, the following two additional options are provided to determine how the bulk edits will take effect:

- Append to Existing Permissions: All existing permissions for the selected dashboards will be replaced with the current configuration.
- Replace all Existing Permissions: All existing permissions for the selected dashboards will remain configured as before. Any additional permissions being defined will be added to the existing permissions. The one exception to this rule is if the existing permission is set to All; in this case, permissions for the selected dashboards will remain unchanged.

Configuring Settings for Web Integrations

Screen types where the **Settings** tab is available:

- Web Integrations

Web Integration screens allow you to embed an external web page onto a tab in the PatientKeeper application. The **URL** field is the only item on the **Settings** tab. Simply enter the full URL (including the "http://" or "https://" portion of the address) of the external page that you would like to open on this screen in the PatientKeeper application.

Using the Summary Tab

Screen types where the **Summary** tab is available: All screen types.

The **Summary** tab is useful as a final quality check before saving a screen definition. It shows a summary of all the settings and components that you configured on all of the other tabs. This information is view-only; to change a item that looks incorrect, go back to the tab where that information is defined.

Managing the Organization's Screens

As you continue to create, edit, and update your dashboards and reports over time, it is important to actively manage your organization's screens to eliminate duplicates and ensure that you retain only those screens that are needed within your facility or institution.

- To review or edit a screen's definition, see *Editing a Screen*.
- To delete a screen that is no longer useful, see *Deleting a Screen*.

3

Editing Dashboards and Reports

Several dashboards and reports are included with Revenue Reports by default. The default dashboards and reports are designed to be used in some of the more common clinician and administrative workflows and their layout resembles prior PatientKeeper release versions to provide a smooth transition for clinicians and administrators accustomed to using PatientKeeper software. This document uses the term “screen” to collectively describe both dashboards and reports.

While the default dashboards and reports allow customers to ramp up on Revenue Reports with a minimum of effort, it is expected that over time, customers will frequently configure screens to suit a particular workflow or situation. Authorized administrators can re-configure the default dashboards and reports for their own purposes by adding, removing, or configuring gadgets to precisely control the information that gadgets display when used within a particular screen. Administrators can also create new screens from the default screens by copying and saving them under a revised name.

End users also have some control over their report usage, by applying some basic customizations at the time they are viewing a report. For example, all users have the ability to modify the way a report is sorted, change the left-to-right order of the display columns, and add or remove display columns. Any customizations made by an end user do not affect the underlying report definition (only a person with edit permission for a report can edit the report’s definition). End user customizations can be undone by that same user by invoking the **Revert to Default** option.

See the *PatientKeeper Revenue Reports User Help* for instructions on how a user can customize a report, as well as how they can revert back to the default definition.

> **NOTE:** End users cannot customize a Patient Dashboard unless they have been granted explicit edit permissions.

Editing a Screen

There are two ways to open a screen for editing. You can open it while actually viewing the dashboard or report, or you can open it from the **Dashboard Management** tab. In order to edit a screen, you must have edit permissions for the particular screen that you want to edit, as described in *Defining Who Can Edit a Screen*.

Editing a Screen While Viewing It

1. Open the dashboard or screen that you want to edit so that you are currently viewing it:
   - For Patient Dashboards: Select the **Patients** tab, and then select the desired Patient Dashboard from the Dashboard Selector.
   - For all other Dashboards or Reports: Select the desired tab from the navigation bar.
2. Click the **More** icon in the navigation bar at the top right, and select **Edit Screen**.

   The screen opens in edit mode, with the **Overview** tab shown by default.
3. Navigate among the tabs and make the desired changes to the screen configuration. Each type of dashboard or report has different tabs available for defining the screen, although some tabs are used for all screen types (for example, the **Overview**, **Access**, and **Summary** tabs).

   For instructions on how to define the information on each tab, see:
   - *Configuring the Screen Name and Description*
   - *Configuring the Source Data for a Screen*
   - *Configuring the Criteria for a Screen*
   - *Configuring the Run-time Filters Available on a Screen*
   - *Configuring the Display Gadgets for a Screen*
   - *Configuring the Actions Available on a Screen*
   - *Configuring User Access to a Screen*
   - *Configuring Settings for Web Integrations*
4. (Optional) To review all of the details of your revised screen at a glance, click the **Summary** tab (see *Using the Summary Tab*).
5. Click **Save**.

   Your screen definition is updated and the changes can be immediately viewed by end users with view permissions.

Editing a Screen from Dashboard Management

1. Select the **Dashboard Management** tab.

A list of all screen definitions is displayed, sorted in alphabetical order by screen name.

Screens that are available for editing or deleting display the **Edit** and **Delete** buttons when you mouse over them (shown on the far right of the screen row). System-created screens cannot be edited.

2. Locate the screen you want to modify, hover your mouse cursor over the row, and click **Edit**.

   The screen opens in edit mode, with the **Overview** tab shown by default.

3. Navigate among the tabs and make the desired changes to the screen configuration. Each type of dashboard or report has different tabs available for defining the screen, although some tabs are used for all screen types (for example, the **Overview**, **Access**, and **Summary** tabs).

   For instructions on how to define the information on each tab, see:

   – *Configuring the Screen Name and Description*

   – *Configuring the Source Data for a Screen*

   – *Configuring the Criteria for a Screen*

   – *Configuring the Run-time Filters Available on a Screen*

   – *Configuring the Display Gadgets for a Screen*

   – *Configuring the Actions Available on a Screen*

   – *Configuring User Access to a Screen*

   – *Configuring Settings for Web Integrations*

4. (Optional) To review all of the details of your revised screen at a glance, click the **Summary** tab (see *Using the Summary Tab*).

5. Click **Save**.

   Your screen definition is updated and the changes can be immediately viewed by end users with view permissions.

Deleting a Screen

You can delete a screen at any time if you deem that it is no longer useful to anyone in the organization. In order to do so, you must have edit permissions for the particular screen that you want to delete, as described in *Defining Who Can Edit a Screen*. Screen deletion is permanent, so use this feature with caution.

Deleting a Screen While Viewing It

1. Open the dashboard or screen that you want to delete so that you are currently viewing it:

   – For Patient Dashboards: Select the **Patients** tab, and then select the desired Patient Dashboard from the Dashboard Selector.

   – For all other Dashboards or Reports: Select the desired tab from the navigation bar.

2. Click the **More** icon in the navigation bar at the top right, and select **Edit Screen**.

   The screen opens in edit mode, with the **Overview** tab shown by default.

3. (Optional) You may want to click on the **Access** tab to review the list of users authorized to view this screen, to confirm that none of them still use it, before you delete the screen.
4. Click the **Delete** button in the lower left corner.
5. When prompted to confirm the deletion, click **Yes**.

Deleting a Screen from Dashboard Management

1. Select the **Dashboard Management** tab.

   A list of all screen definitions is displayed, sorted in alphabetical order by screen name.

2. Locate the screen you want to delete, hover your mouse cursor over the row, and click **Delete** .
3. When prompted to confirm the deletion, click **Yes**.

4

Filtering and Sorting in Dashboard Management

When you open the **Dashboard Management** tab, all non-deleted screens in your system are listed. You can narrow down the list of screens that are displayed to help find the specific screen you are looking for based on screen type, users associated with the screen, and more. To do this, use the Dashboard Search pane on the left side of the screen. You can close the pane or open it at any time by clicking the **Close** icon or the **Open** icon .

Most of the search criteria correspond to the headings in the display area. Note that you can sort the display based on headings.

To search for screens:

1. Click the **Dashboard Management** tab.
2. In the left pane, enter the filter criteria you want.
   - **Name** search field: Type the name, or part of the name, of the screen you are looking for and then press the Enter key to perform the search. This field accepts up to 100 alphanumeric values.
   - **Type** drop-down: Select only the screen type(s) that you want to want to see. All active screen types are included in the drop-down list.

- **By User** drop-down: Select the type of users who have some link to the screens. The two drop-down available here are: Link Type and Entity Type.
  - **Link Type-** The type of association a user has with the screen. Link options include:
    - View Permissions- When selected, the Entity drop-down becomes available.
    - Manage Permissions- When selected, the Entity drop-down becomes available.
    - Open For- screen is available to a specific user. You can only search for users with this option.
  - **Entity Type**- Specify the entity by which you want to filter. After you've specified the entity, you can enter the value you want to search for in the Search field. Entities options include:
    - All Types- This option looks for all types with the selected Link Type (View/Manage Permissions).
    - Departments- This option looks for users with the selected Link Type (View/Manage Permissions) for the specified department(s).
    - Facilities- This option looks for users with the selected Link Type (View/Manage Permissions) for the specified facility(ies).
    - PAT Access Level- This option looks for users with the selected Link Type (View/Manage Permissions) for the specified access level.
    - Roles- This option looks for users with the selected Link Type (View/Manage Permissions) for the specified user role(s).
    - Specialties - This option looks for users with the selected Link Type (View/Manage Permissions) for the specified specialty(ies).
    - Users- This option looks for specific a user(s) with the selected Link Type (View/Manage Permissions).

  To see all options in search field, press the **Enter** key when no text is entered.
- **Tab Screens Only**: Select this option to limit the list of screens to only those screens available on the Open a Screen page. When selected, the list excludes the Patient Dashboards that are available on the **Patients** tab.
- **Contains Gadgets**: Search for screens that contain the specified gadget(s). By default, only active gadgets are considered. To include inactive gadgets, select the **Include Inactive Gadgets** checkbox.
- **Owner**: Filters the list by the screen owner. Enter the first name, last name, or user name of an active or deleted user to find the screen owner by which you want to filter. When an owner is selected, only those screens owned by that user are displayed.
- **Creator**: Filters the list by user who created the screen. Enter the first name, last name, or user name of an active or deleted user to find the screen creator by which you want to filter. When a creator is selected, only those screens created by that user are displayed.
- **Updated-By**: Filters the list by user who last updated the screen. Enter the first name, last name, or user name of an active or deleted user to find the user by which you want to filter. When a user is selected, only those screen that were last updated by that user are displayed.
- **Created Date**: Filters the list based on when a screen was created. Only those screen created within the specified timeframe are displayed.

- **Updated Date**: Filters the list based on when a screen was last updated. Only those screen updated within the specified timeframe are displayed.

To sort the list of screens:

- Click the heading to sort in ascending order.

  Click again to reverse the sort in descending order.

Related topics:

Editing a Screen

Deleting a Screen

5

Managing Dashboards and Navigation Tabs for Users

Administrators can use the **Dashboard and Tab Configuration** setting to configure which Patient Dashboards are hidden or shown in the **Dashboard Selector** on the **Patients** tab for a user, which navigation tabs are open or closed in the **Navigation Bar**, and the order in which the Patient Dashboards and navigation tabs are displayed. This configuration can be done for an individual user or for a group of users.

Configuring for Users versus Groups

You can define dashboard and tab configuration using any of the methods below:

- For an individual user via the setting below:

  Admin - User - Screens - **Dashboard and Tab Configuration**

- For a selected group of users, found using the **SEARCH FOR USER** option under **Admin > Bulk User Edit**.
- For a non-user entity such as a Department, Facility, or Role, found using the **BULK SELECT** option under **Admin > Bulk User Edit**.

When configuration changes are made for non-user entities, the change is saved for the entity itself, not for the users who are currently associated with that entity (for example, for the Cardiology department, not for the ten users currently in the Cardiology department). This allows entity-specific configuration changes to be applied automatically as users are associated or disassociated from an entity.

Related topics:

Defining Dashboard and Tab Configuration for an Individual User

Defining Dashboard and Tab Configuration for a Group

How Configuration Conflicts are Resolved

How Configuration Conflicts are Resolved

It is possible that there could be a conflict if dashboards or navigation tabs are configured in different ways for different entities. For example, a navigation tab could be configured as Open for a department to which a user belongs, and as Closed for a role assigned to the user. The tie-breaker logic below is used when there is a conflict:

- The configuration for an individual user overrides the configuration for an entity to which the user belongs. For example, if a tab is configured as Open for a user but Closed for the user's department, then the user's configuration of Open takes precedence.
  - Note that a user's dashboards and tabs can also be configured by the user at runtime, by simply opening or closing navigation tabs, or by using the **Dashboard Management** option in the **Dashboard Selector** drop-down on the **Patients** tab. Changes made in this manner are considered to be a saved configuration for a user.
  - Changes made in **Bulk User Edit** for a group to which the user belongs *after* a user configuration is saved overrides whatever has been done at runtime. For example, if a new tab is configured as Open for a group to which the user belongs, then that tab is opened for the user the next time they log in. The user can then once again override this at runtime.
- If dashboards and tabs are configured in different ways for different entities to which the user belongs, and there is no user configuration to use as a tie-breaker, then the most recently updated configuration is used. For example, if tab order was set for a user's role, and then later it was set for a user's department, the department's tab order would be used.

Related topics:

Defining Dashboard and Tab Configuration for an Individual User

Defining Dashboard and Tab Configuration for a Group

Defining Dashboard and Tab Configuration for an Individual User

To configure a single user's dashboard and tab configuration:

1. Go to **Admin > User > [select a user] > Screens**.
2. Click **Edit** next to the **Dashboard and Tab Configuration** setting.

   The Dashboard and Tab Configuration screen is displayed. It contains the three sections below:

- Tab Screens
- Patient Dashboards
- Patient List Dashboards (Note that this type of dashboard is not supported in Revenue Reports mode. Therefore, administrators should not configure them here.)

3. Configure the user's navigation tabs as described in *Configuring Behavior for Navigation Tabs*.
4. Configure the user's Patient Dashboards as described in *Configuring Behavior for Patient Dashboards*.
5. Click **Update** in the bottom right corner to save your changes.

   The configuration is applied at the user's next login.

Related topics:

Defining Dashboard and Tab Configuration for a Group

Resetting a User's Dashboard and Tab Configuration

How Configuration Conflicts are Resolved

Resetting a User's Dashboard and Tab Configuration

You might reset a user's configuration if you had edited a the user's configuration, and then realized that you wanted to reset it back to that of a group to which the user belongs.

1. Go to **Admin > User > [select a user] > Screens**.
2. Click **Edit** next to the **Dashboard and Tab Configuration** setting.

   The Dashboard and Tab Configuration screen is displayed.
3. Click **Reset** in the bottom left corner.

   The next time the user logs in, their configuration will reflect that of their group.

Defining Dashboard and Tab Configuration for a Group

1. Go to **Admin > Bulk User Edit**.
2. Search for users or entities using either of these methods:
   - Click **SEARCH FOR USER** and then search for users based on their Name, Access Level, Department, Facility, Role, or Specialty.

     The users who match your search criteria are listed on the left side of the display area. Click the check-box next to one or more user names to select them.
   - Click **BULK SELECT** and then search for one or more entities such as All Users, a Department, a Facility, a Specialty, an Access Level, or a Role.

     The entities that you select are listed on the left side of the display area.

   See *Bulk User Editing* for more information on searching for and selecting users or entities.
3. Once the desired users/entities are selected, click the **Screens** heading on the right side of the screen to expand it.
4. Click the **Dashboard and Tab Configuration** button.

The Dashboard Search screen is displayed. It lists every active screen that is defined in your system.

5. Use the criteria on the left side of the screen to search for the screens that you want to configure for the group. Then click the checkbox next to one or more screens to select them.

   You may perform multiple searches and select any combination of screens or screen types. See *Filtering and Sorting in Dashboard Management* for more information on searching.

6. Click the **Settings** button at the top left of the display area.

   The Dashboard and Tab Configuration screen is displayed. It contains up to the three sections below, depending on which screen types you selected in Step 5 on page 34:

   – Tab Screens

   – Patient Dashboards

   – Patient List Dashboards (Note that this type of dashboard is not supported in Revenue Reports mode. Therefore, administrators should not configure them here.)

7. Configure the group's navigation tabs as described in *Configuring Behavior for Navigation Tabs*.
8. Configure the group's Patient Dashboards as described in *Configuring Behavior for Patient Dashboards*.
9. Click **Update** in the bottom right corner to save your changes.

   The configuration is applied to each user in the group at their next login.

Related topics:

Defining Dashboard and Tab Configuration for an Individual User

How Configuration Conflicts are Resolved

Configuring Behavior for Navigation Tabs

The Tab Screens section of the **Dashboard and Tab Configuration** option allows you to:

- Define which navigation tabs are open, locked open, or closed for a user.
- Set a default tab to be the active tab when a user first logs in.
- Define the order of the tabs, left to right, in the **Navigation Bar**.

Instructions:

1. Follow the steps in either of the topics below to access the Dashboard and Tab Configuration screen:

   – *Defining Dashboard and Tab Configuration for an Individual User* (Step 1 on page 32 through Step 2 on page 32)

   – *Defining Dashboard and Tab Configuration for a Group* (Step 1 on page 33 through Step 6 on page 34)

2. Click the **Expand Arrow** at the far right of the Tab Screens heading to expand the section.

   – If you are configuring for an individual user, click the **Add** drop-down field Add at the top of the Tab Screens section, and then search for and select on or more screens that you wish to configure for the user. As you select each screen, it is added to the Tab Screens section. (You might have to expand the section again to view all the screens.)

– If you are configuring for a group via **Bulk User Edit**, all the screens you selected from the Dashboard Search screen are displayed. There is also an **Add** drop-down field Add at the top of the section, so that you can select even more screens, if necessary. You can also remove a screen, if you decide you do not want to configure it after all. Hover your mouse cursor over the screen's row to expose the **Remove** button , and then click it.

3. Configure the sort order for the selected screens by clicking and holding the **Sort** button for specific screens, and then dragging and dropping them into the desired order. The screen that you place at the top of the list will be the left-most tab, while the one at the bottom will be the right-most tab.

   Or, if you want the screens to display in alphabetic order by name, click the **Alphabetic Sort** button , located in the heading.

   If a user currently has additional screens open that were not selected here, those screens will remain open and in their current sort order before any new tabs are added. For example, if a user currently has screens A, B, and C open, and an administrator sets the tab order as B, D, E, F for the user, then the user will have the following tabs open upon next login: A, C, B, D, E, F.

4. For each screen, configure its open/closed state:

   – **Open**: The tab for the screen will be open by default (and unlocked) upon their next login. If a selected user does not have permission to view this screen, it will be set as open but will not be visible to the user at runtime. If the permissions for the screen are later modified to allow the user to view it, the user will automatically see it as open the next time they log in.

   – **Locked Open**: The tab for the screen will be open by default, and the user will not be able to close it (the small X that is typically available in the upper right corner of the tab will be hidden). If the tab was already open for the user, it will remain open and the state will be updated to locked. If a selected user does not have permission to view this screen, it will be set as locked open but will not be visible to the user at runtime. If the permissions for the screen are later modified to allow the user to view it, the user will automatically see it as open and locked the next time they log in.

   – **Closed**: The tab for the screen will be closed by default upon the next login. If the user does not have permission to view the screen, it will be set as closed. If the permissions are later modified to allow the user to view it, it will *not* be automatically open the next time the user logs in (the user would have to explicitly open it to see it).

5. Select one screen to be the active tab for the user upon their *next* login, by clicking the radio button for that screen in the **Default Selected** column. For any *subsequent* logins, the last selected tab in the previous session will be open by default upon login.

Related topics:

Defining Dashboard and Tab Configuration for an Individual User

Defining Dashboard and Tab Configuration for a Group

Configuring Behavior for Patient Dashboards

Configuring Behavior for Patient Dashboards

The Patient Dashboards section of the **Dashboard and Tab Configuration** option allows you to:

- Define which Patient Dashboards are shown or hidden in the user's **Dashboard Selector** list.
- Define the order of the Patient Dashboards in the user's **Dashboard Selector** list.
- Define the default Patient Dashboard for the user (the one at the top of the user's **Dashboard Selector** list).

Instructions:

1. Follow the steps in either of the topics below to access the Dashboard and Tab Configuration screen:
   - *Defining Dashboard and Tab Configuration for an Individual User* (Step 1 on page 32 through Step 2 on page 32)
   - *Defining Dashboard and Tab Configuration for a Group* (Step 1 on page 33 through Step 6 on page 34)
2. Click the **Expand Arrow** at the far right of the Patient Dashboards heading to expand the section.
   - If you are configuring for an individual user, all available Patient Dashboards are displayed in the section.
   - If you are configuring for a group via **Bulk User Edit**, all the dashboards you selected from the Dashboard Search screen are displayed. There is also an **Add** drop-down field Add at the top of the section, so that you can select more Patient Dashboards, if necessary. You can also remove a dashboard, if you decide you do not want to configure it after all. Hover your mouse cursor over the screen's row to expose the **Remove** button, and then click it.
3. Configure the sort order for the selected Patient Dashboards by clicking and holding the **Sort** button for specific dashboards, and then dragging and dropping them into the desired order. The order that you configure here will be the order in which the Patient Dashboards are listed in the **Dashboard Selector** drop-down on the **Patients** tab.

   Or, if you want the Patient Dashboards to display in alphabetic order by name, click the **Alphabetic Sort** button, located in the heading.

   If a user currently has additional Patient Dashboards in their **Dashboard Selector** list that were not selected here, those dashboards will remain in their current sort order before any new dashboards are added. For example, if a user currently has dashboards A, B, and C in their list, and an administrator sets the order as B, D, E, F for the user, then the user will have the following dashboards in their list upon next login: A, C, B, D, E, F.
4. (Optional) Select one Patient Dashboard to be the active one for the user upon their next login, by clicking the radio button for that dashboard in the **Default** column. Once you click the radio button, the dashboard is automatically sorted to the top of the list (if not already there). If a user does not have permission to view the default dashboard, the next dashboard in the list that they have permission to view will be the first/ default dashboard for the user.
5. For each screen, configure its show/hide state:
   - **Show**: The Patient Dashboard will be available in the user's **Dashboard Selector** list upon their next login. If a selected user does not have permission to view this dashboard, it will be set as available but

will not be visible to the user at runtime. If the permissions for the dashboard are later modified to allow the user to view it, the user will automatically see it in their list the next time they log in.

– **Hide**: The Patient Dashboard will be set as hidden in the user's **Dashboard Selector** list upon the next login. If the user does not have permission to view the dashboard, it will still be set as hidden. If the permissions are later modified to allow the user to view it, it would *still* be set as hidden the next time the user logs in (the user would have to explicitly unhide it to see it via the **Manage Dashboards** option in the **Dashboard Selector** drop-down).

Related topics:

Defining Dashboard and Tab Configuration for an Individual User

Defining Dashboard and Tab Configuration for a Group

Configuring Behavior for Navigation Tabs