Connect Custom Patient Menus Training

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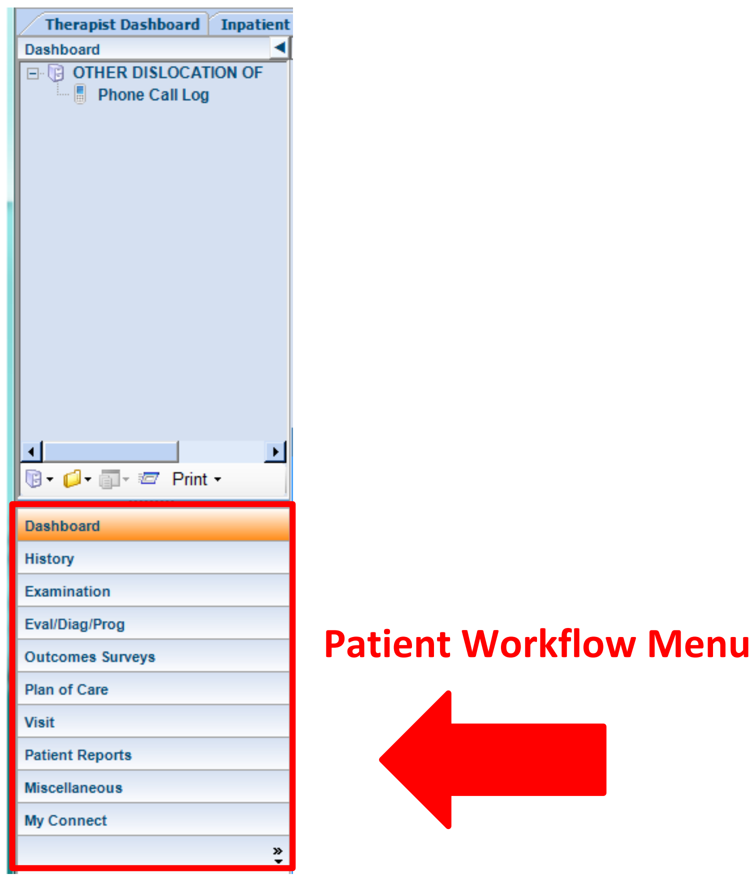
Contents

Introduction

Introduction

For this training, we are going to learn how to customize the patient menu on the lower left side of your patient's dashboard. The Patient Workflow menu is visible whenever the user is in a patient chart in Connect.



Customizing the Patient Workflow Menu streamlines Connect's workflow to meet your organization's needs. This customization will allow you to rename buttons, create new buttons, add or remove forms associated with each button and group forms according to your preferences. If you have created or customized your own forms, this is where you will make them available in each patient's chart.

Preparing to Create your

Before beginning, think about the patient examination and treatment workflows for your organization including mapping out patient charting from start to finish and then begin the Patient Workflow menu customization process. For example, if your

Custom Patient Menu

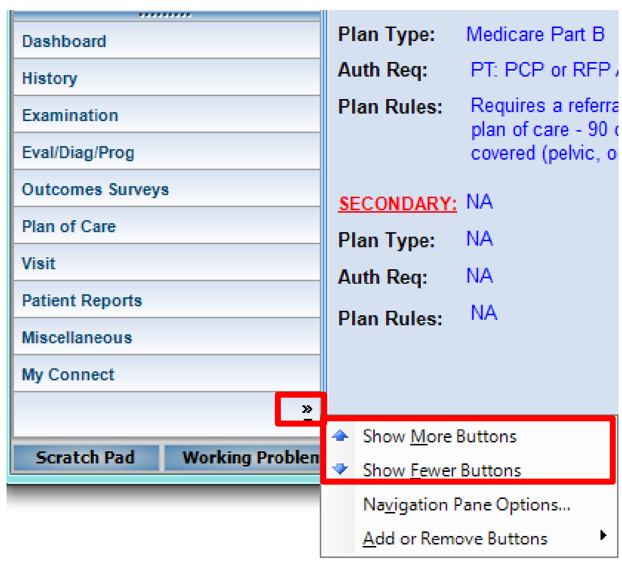
therapists begin each visit by taking a history, then move onto exams, and then outcome surveys, you may want this reflected in the sequence of the buttons in your Patient Workflow menu.

There are two ways to customize Patient Workflow menus. The first way allows the user to make minor changes to sequence and formatting. The second way allows for complete customization of the Patient Workflow menu for the entire organization including creating new buttons (and the forms associated with them), deleting buttons and renaming buttons.

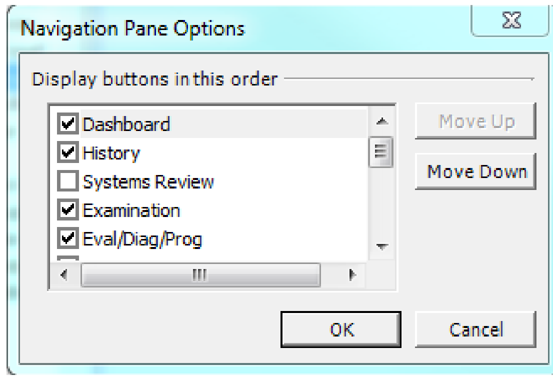
Minor Formatting at the User Level

At the bottom of the Patient Workflow menu, you will see several carets; these take users to a menu that allows them to make minor formatting changes to their work station Patient Workflow menu.

Clicking **Show More Buttons** or **Show Fewer Buttons** will reduce or increase the number of buttons showing in the Patient Workflow menu.

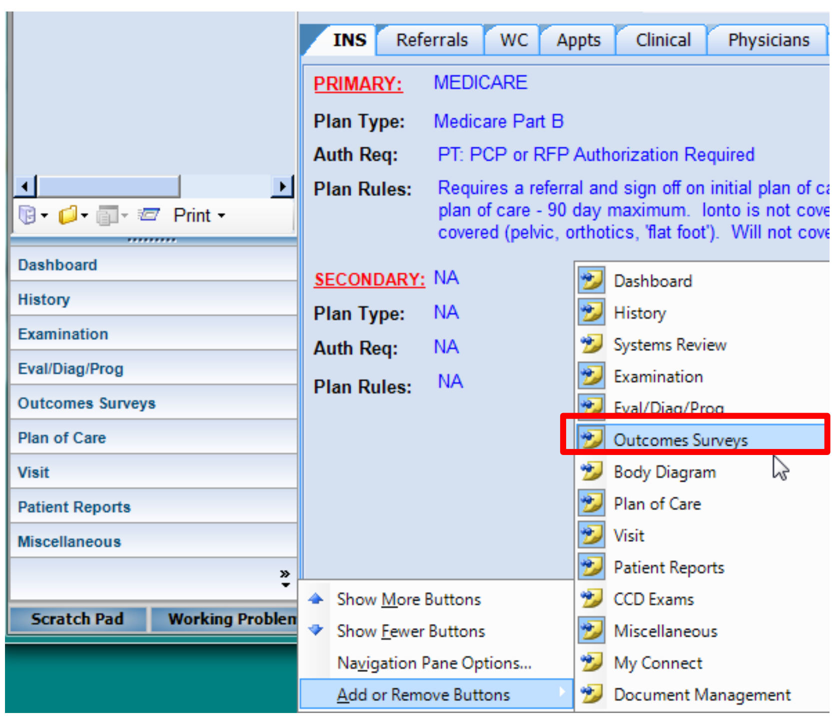


Clicking the **Navigation Pane Options** menu will give the user the opportunity to choose which buttons show in the **Patient Workflow** menu and which order the



buttons appear.

The final button, Add or Remove Buttons, allows the user to have the buttons available but not showing. They are available as a sticky note icon at the bottom of the Patient Workflow menu. Hovering over the sticky note will show the label of the button.



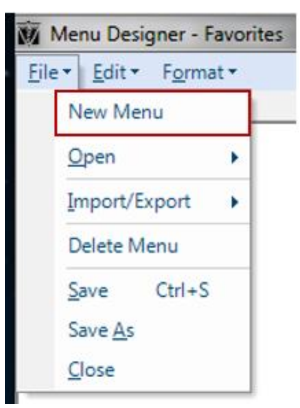
Navigating to Patient Menu Editor

First click on **Utilities** in **Connect's** menu bar and select **Patient Menu Editor**.

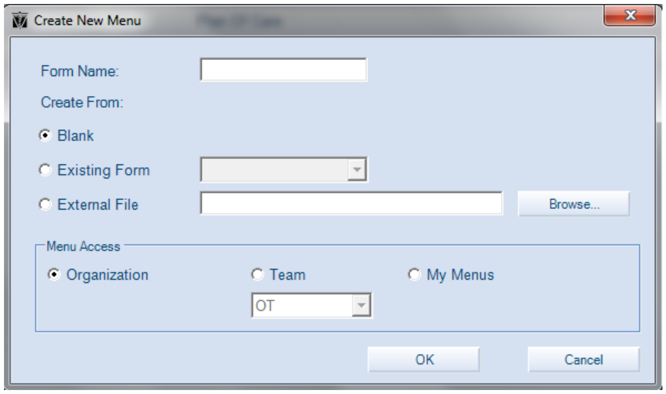
Creating a Custom Patient Menu

The new window will allow you to create a menu from a blank template or edit an existing template.

To create a Patient Workflow menu for your organization, click the **File** button in the upper left corner of your screen and then click **New Menu**.



In the **Create New Menu** window, you can define certain characteristics of your new menu.



Form name

In the form name field, type in the name of your custom Patient Workflow menu. You may want to name it something simple to recognize so you can easily choose it from a drop down box.

Create from

Decide if you would like to start with a blank form, an existing form or an external document. It is strongly recommended that you create your Patient Workflow Menu from an existing template available within CONNECT.

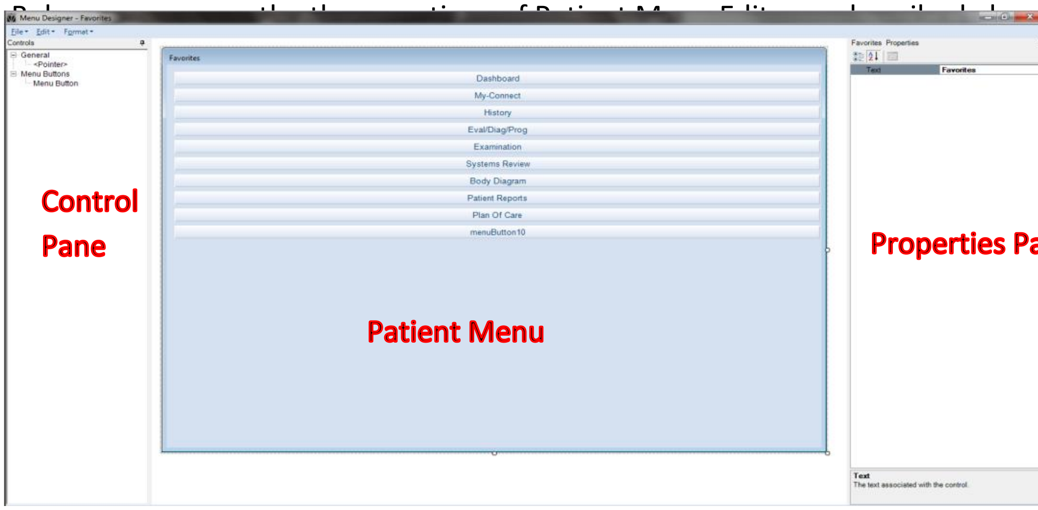
Access level

Next, decide if the Patient Workflow menu should be available to your entire organization, a particular team or only you. It is recommended that you create Patient Workflow menus at the organizational level for continuity across your staff.

Once you have completed these three fields, click **OK** at the bottom of the window.

After you click **OK**, your new screen should display the template you've chosen.

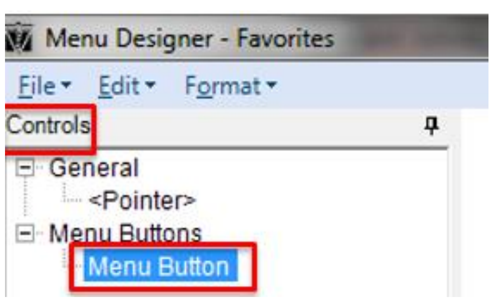
On the left side of the screen, you will see the **Control Panel** with the functionality tools, in the center your will see the **Patient Workflow Menu**, and on the right side you will see the **Properties Box** for formatting your new Workflow menu.



The Control Pane

The control pane holds the Patient Menu functionality.

To add a new button to your Patient Menu, drag and drop the **Menu Button** into your Patient Menu. You don't need to resize the button as CONNECT will automatically resize it in the Patient Workflow chart.



When you drop the new button onto the Patient Workflow menu, a new window will appear where you can assign specific functionality to the button.
In the **New Menu Preset** window, you can see that you have the option to choose a preset and name the new button (menu name).

By **choosing a preset**, the new button can be based on a standard CONNECT button, or you can mix and match forms by choosing **None**.

The name for each button should reflect the group of forms populated within the button.

If you **chose a preset** button, you will not be taken to the Menu Editor, because the system will assume you are going to use the specific preset menu.

If you chose **None**, clicking **OK** will take you to the **Menu Editor** window.

When creating buttons for the Patient Workflow Menu, it is very important to assign a **Dashboard** button in order for CONNECT to function properly. The **Dashboard** button works as a home button for you patient chart. Also please include the preset **Visit** button with the appropriate forms associated with a patient visit nested within so CONNECT can appropriately push charges. Finally, to ensure National Outcomes Database points are being collected, please include the **Miscellaneous** button or a link to **Data Completeness**. Additionally, if you removed the Patient Reports tab from your therapist dashboard, you will want to ensure all necessary patient reports are available to your users via the Patient Workflow menu.

Associating Forms with a Button

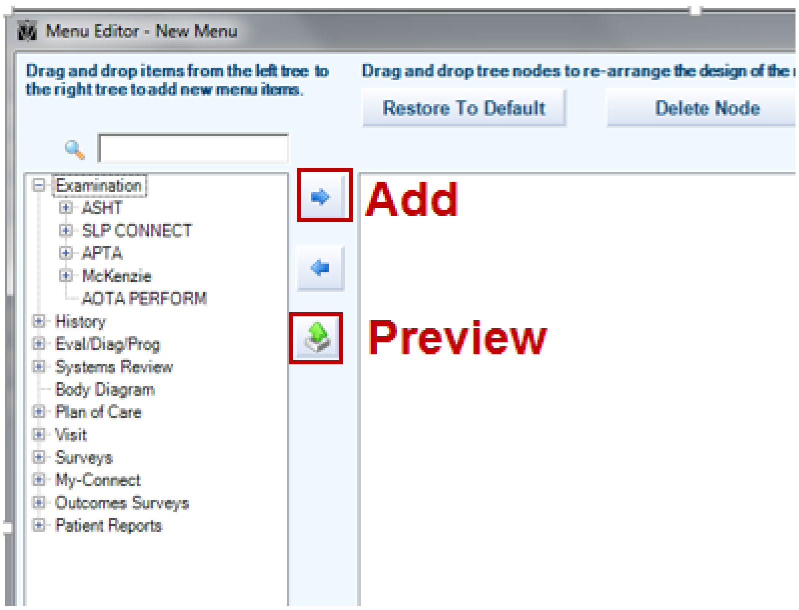
If you chose **None** for the preset menu button, you will need to add forms to the button. By choosing **None**, you will automatically be taken to the **Menu Editor – New Menu** window.

The **Menu Editor – New Menu** window is made up of two areas; all available forms can be found on the left side of the screen and a list of forms associated with the button you just created will be on the right side of the screen.

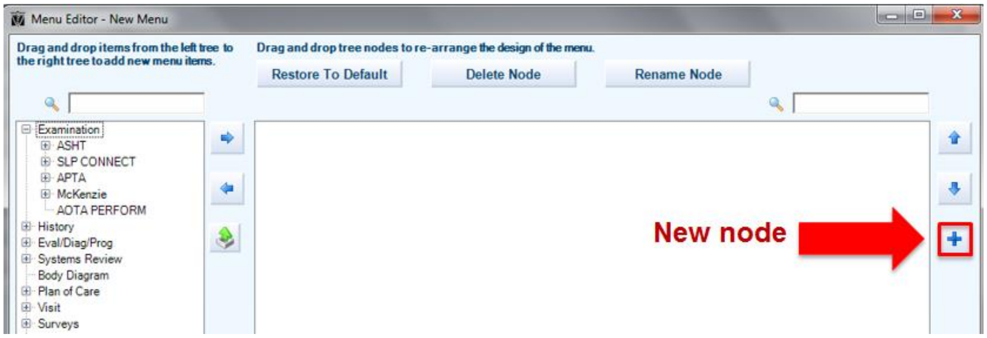
To find a specific form, you can search through each description tree or you can search using the **Search** box on the upper left side of the screen.

Please note that not all buttons can have forms or surveys associated with them (for example the **Dashboard** button).

Once you find the form you are looking for, highlight it and preview it by selecting the Preview button located between the two Menu Editor panes; if it is the form you are looking for, click the blue right arrow.



To create a node or a group of similar forms with a single header, click the blue plus sign on the right side of the screen.



In the new window, type the name of node and click **OK.** An example of a node name would be APTA Forms. If you would like to rename your node, click the **Rename Node** button at the top of the screen.

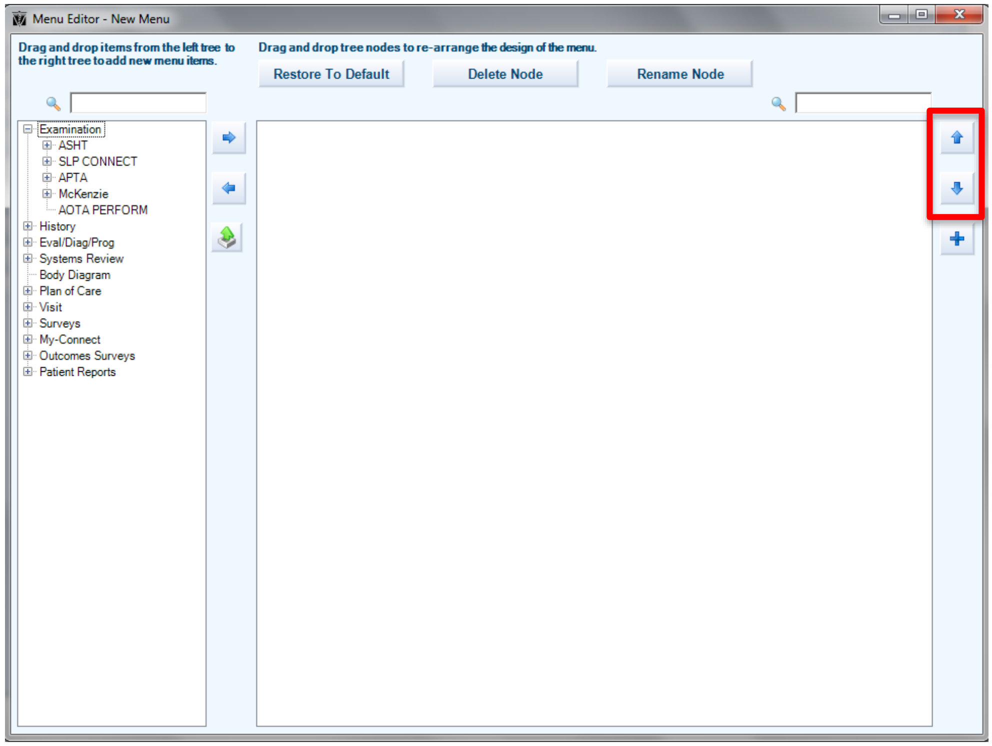
Now you can select the forms (or group of forms) you would like to associate with that node. Highlight the node you just created and then drag and drop the forms (or click the blue right arrow) to nest them under the new node.

The **Restore to Default** button restores the buttons to default status or the last saved status.

To remove forms that you have added, highlight the unwanted forms then click the left blue arrow, or push the **Delete** key on your keyboard.

You can add as many forms as you would like to each button, however you may want to split your forms under different buttons to organize and streamline the content.

If you would like to rearrange the order in which the forms or nodes appear, highlight the specific form and click the blue up or down arrow on the right of the screen to rearrange the sequence of the form or node.



Once you are done attaching all the appropriate forms to that button, click the red **X** in the upper right corner of your screen to save the content you have created and close the window.

Continue to create buttons and associate the appropriate forms until you have completed your custom Patient Workflow menu.

Organizing your Patient Menu Buttons

After you finish creating all your menu buttons, you can rearrange their order by dragging and dropping them to the desired position and in the desired sequence.

Saving your Custom Patient Menu

When you are done customizing your menu buttons, there are three ways to save your new or edited menu.

1) Go to the File menu and select Save.
2) On your keyboard, hold down the *Ctrl* button and select *s*.
3) Click the red **X** in the upper right corner to close the Menu Designer. When prompted, click **Yes** to save the new Patient Workflow menu you just created.

Import/Export/ Delete Patient Menus

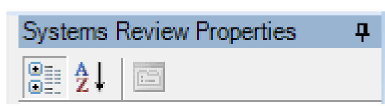
Under the File menu at the top of your screen, you also have the options to **Save**, **Save As**, **Delete**, and **Import/Export** your Patient Workflow Menu.

The Properties Box

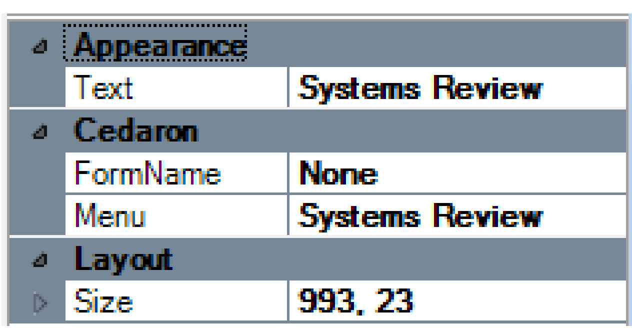
To change the formatting of a particular button you will utilize the Properties Box on the right side of your **Menu Editor** window.

First highlight the button you wish to format. The Properties Box will have different formatting options available for each button depending on the type of button.

You can sort the formatting options for a specific button in one of two ways: alphabetically or by category.



There are three different formatting options categories available: Appearance, Cedaron and Layout.



To change the name of the associated with your buttons, highlight the button you want to edit, and change the name in the *Text* property.

To change the content of the forms associated with your buttons, highlight the button you want to edit and click the **Menu** option in the **Properties Box** on the right side of the screen. Now click on the **ellipses** box on the right side of the menu column. The editor will take you to the Menu Editor window where you can add, delete forms or rearrange associated with that button.

Editing an Existing Patient Menu

To edit an existing Patient Menu, click on **Utilities** in CONNECT's menu bar and select **Patient Menu Editor**.

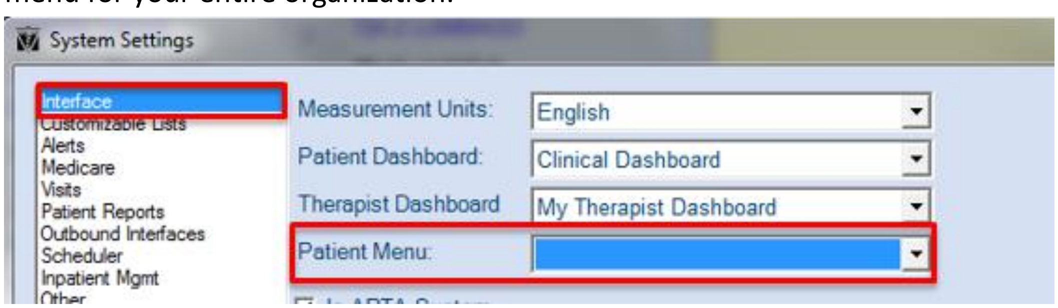
In the window, click **File**, then **Open** and select the Patient Workflow menu you would like to edit.

When you open the Patient Workflow menu you would like to edit, you will be taken to the same screen you utilized to create the Patient Menu.

Enabling a New Patient Workflow Menu for Your Organization

To enable a new Patient Workflow menu, first close any open Workflow charts, then click on **Utilities** menu on your Connect menu bar, and select **System Settings.**

In the **System Settings** window, click **Application Features,** and pick the appropriate menu from the **Patient Menu** drop down box. This will change the Patient Workflow menu for your entire organization.



Click **OK** to save your changes.

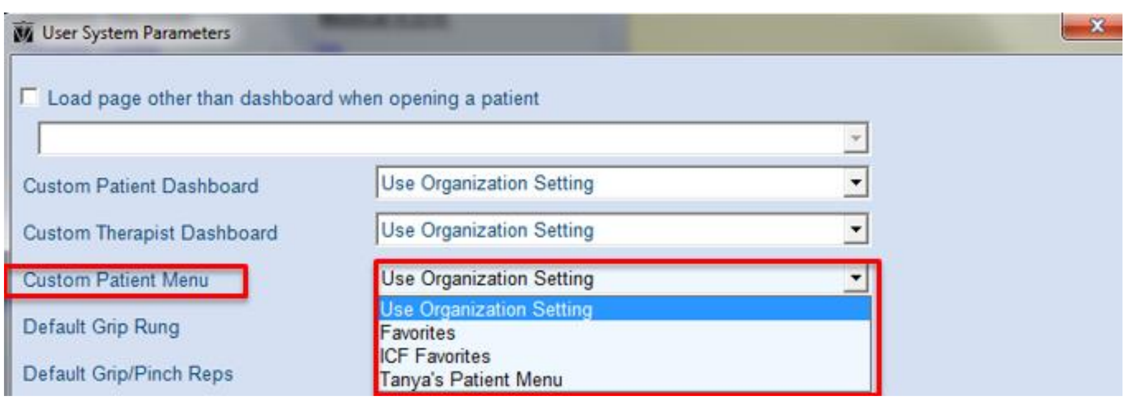
Enabling a

To change the Patient Workflow menu for your user only, click on **Utilities** then **User**

Patient Menu for your User

System Settings.

In the **User System Settings** window, click on the Workflow menu you would like to use for your login only from the drop down box next to **Custom Patient Menu**.

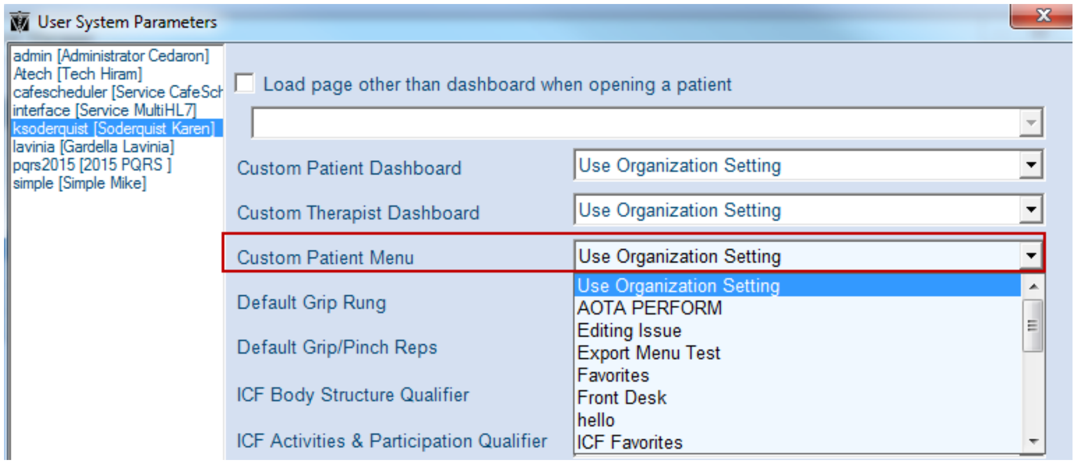


Click **OK** to save your changes.

Assigning a Patient Menu

To change the Patient Menu for another user or multiple other users, click on **Security** then **User Manager** and then **Settings.**

for Another User



In the **User System Parameters** window, select the user for whom you would like to assign a different menu in the left column, and then select the ***Custom Patient Menu*** *Menu* you would like to use for that user only.

Click **OK** to save your changes.

Review & Homework

Review

Homework

1. Gather any paper forms that you currently use (steps below will help you identify what you can use in the system to meet your needs and what you might want to custom build)
2. Familiarize yourself with the stock content within Connect
   a. Make note of which stock forms your organization wants to use as-is.
   b. Make note of which stock questions your organization wants to reuse when creating new forms.
   c. Make note of any content your organization wants to create from scratch (questions/surveys/forms)
3. Decide on workflows for your organization to replicate in Connect
4. Consider how you want to create custom Patient Menus (at the Organization level? User level? Menus for each PT/OT/Speech?)
5. Create your custom Patient Menu(s)

a. Start from scratch or use a template.
b. Add or remove buttons as desired to facilitate your workflow.
c. Add or remove forms from buttons to leave only those forms that you want to use as-is.