Table Maintenance - Patient Summary

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by TruBridge

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Clear the way for care.

Table Maintenance - Patient Summary

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Chapter 1   Introduction

1.1   Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. TruBridge's Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on TruBreidge's interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client's attestation, TruBridge bears no responsibility for attestation information submitted by the client.

1.2   What's New

This section introduces the new features and improvements for the **Table Maintenance - Patient Summary** for release Version 22.01. A brief summary of each enhancement is given referencing its particular location if applicable. As new branches of Version 22.01 are made available, the original enhancements will be moved to the Previous Work Requests section. The enhancements related to the most current branch available will be listed under the main What's New section.

Each enhancement includes the Work Request (WR) Number and the description. If further information is needed, please contact the **Client Services** Support.

NOTE: Version 22.01 does not include any new enhancements.

Chapter 2   Overview

The Patient Summary tables enable the facility to customize the tables related to various applications in the system. Maintenance to the Patient Summary tables may be performed using the Table Maintenance option.

To access the Patient Summary tables, select **Tables** from the navigation menu. Then select Patient Summary from the navigation menu.

Select **Web Client** > **Tables** > **Patient Summary**
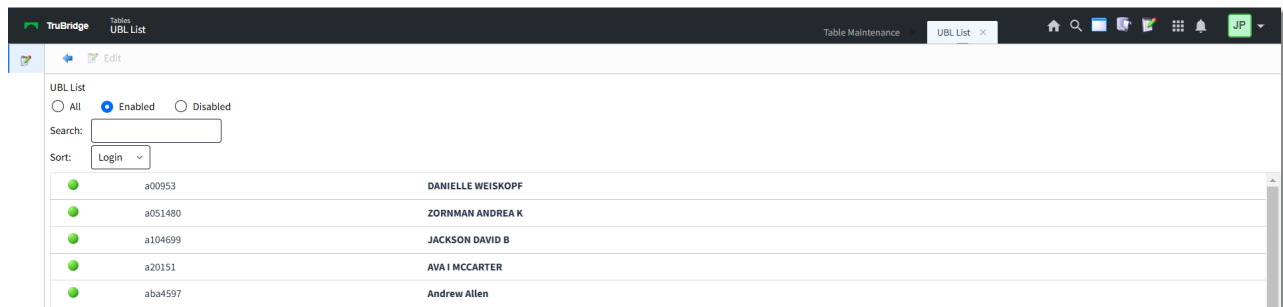

Patient Summary Table
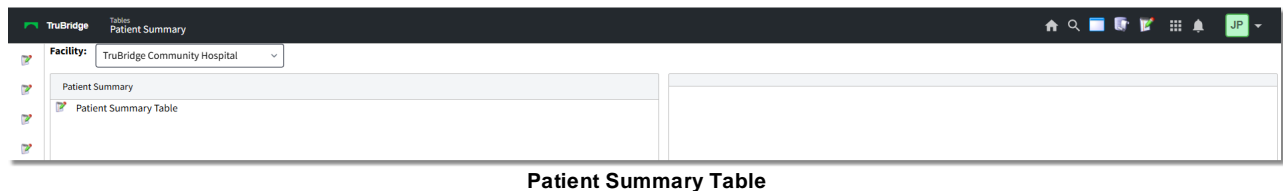
NOTE: *Facilities outside of the United States may choose a date format of MMDDYY, DDMMYY or YYMMDD to be used on all date fields in the Patient Summary tables. Where four-digit dates display, a date format of MMDD, DDMM or MMDD, respectively, will be used. Whichever date format is selected will be reflected in all date fields and column displays throughout the tables. A TruBridge Representative should be contacted in order for the date format to be changed.*

Chapter 3   Patient Summary Table

The Patient Summary Table will allow an administrator to setup, edit and delete Patient Summary views for other users within the Patient Summary application.

Select **Web Client > Tables > Patient Summary > <u>Patient Summary Table</u>**


UBL List

To create a new Patient Summary view for another user login, select **Patient Summary** from Table Maintenance.

- Select **Patient Summary Table**.

- The user logins may be sorted by **All**, **Enabled** or **Disabled** from the available radio options on the UBL List.

- The **Sort** option drop-down allows the logins to be searched by **Name** or **Login**.

- Enter the desired **Name** or **Login** in the **Search** field.

- Select the desired login and select **Edit**.

The **Edit View** option provides a listing of all saved views and their configurations. The **New** option allows a new view to be created or a previously saved view may be edited by highlighting the view configuration and selecting **Edit**.

Previously saved views may be deleted with the **Delete** option. One view configuration may be set as the default by highlighting it and selecting **Default**. Once a different view configuration is selected, the prior default will display as **No**.

Select **Web Client** > **Tables** > **Patient Summary** > <u>**Patient Summary Table**</u>
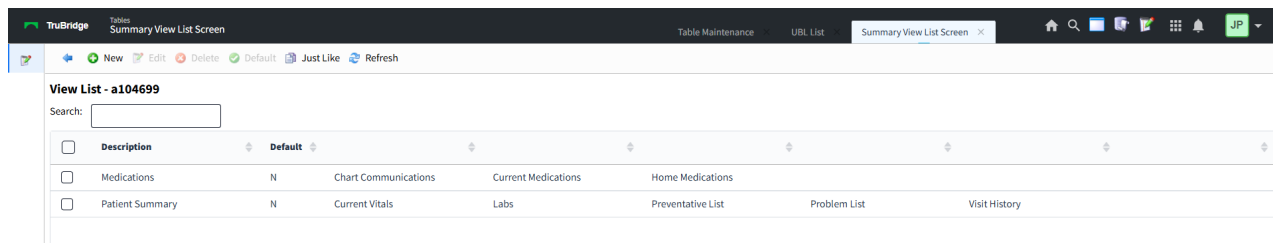

View List

The View List screen provides a listing of all saved views with the Description of the view in the first column. The second column defines which view is currently set as the default. The following Element 1 through Element 6 columns display the applications set to display in the view. The number of defined elements determine the number of components which will display in the Patient Summary.

To create a new view for the Patient Summary, select **New**.

Select **Web Client** > **Tables** > **Patient Summary** > **Patient Summary Table** > <u>**New**</u>
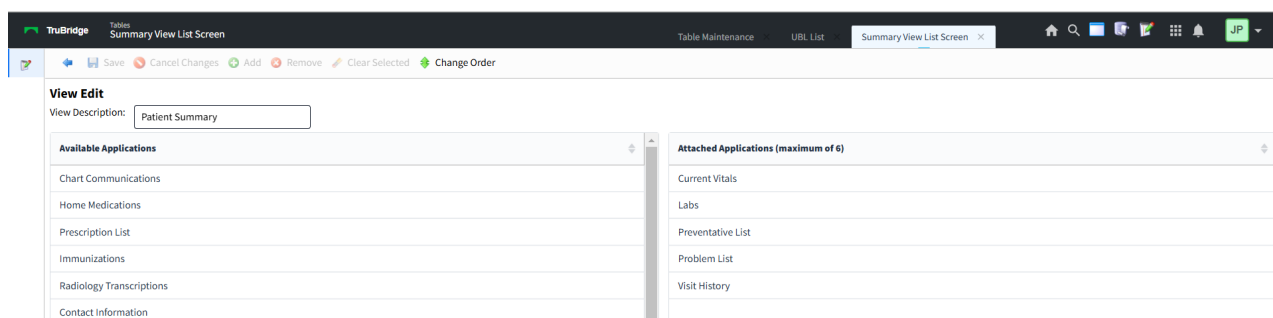
View Edit

1. Enter the name of the view within the **View Description** field with up to 35 characters.

2. Highlight any of the applications from the **Available Apps** column and select **Add** to move the application to the **Attached Apps** column.

3. If an application is added incorrectly, highlight the application in the Attached Apps column and select **Remove** from the action bar.

4. Select **Save** from the action bar to save the new view for the Patient Summary.

Cancel Changes allows the user to back out of the View Edit without saving any changes made.

Clear Selected allows the user to remove any changes made while in the View Edit and return to what was previously saved.