



**BPAC** Clinical Solutions

# Patient Prompt Dashboard Setup

User Guide

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# BPAC Patient Prompt Dashboard Setup

## 1 Choosing the Patient Prompt for the Dashboard

1. Click the Options icon
2. Select 'Reference Nos'

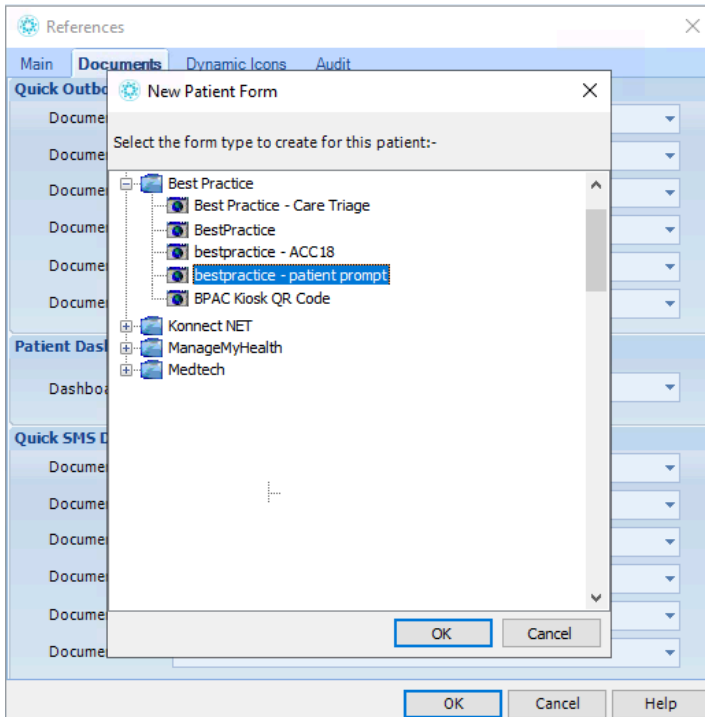


The screenshot shows the 'Options' window with a sidebar on the left containing various setup categories. The 'Reference Nos' category is highlighted in orange. The main area displays the 'References' configuration window, which has tabs for 'Main', 'Documents', 'Dynamic Icons', and 'Audit'. The 'Main' tab is active, showing fields for 'Next Invoice Reference' (7), 'Next Payment Reference' (1), 'Next Chart Number' (60), and 'Next Internal Patient Id' (20). There are buttons for 'Find Next Inv', 'Find Next Ref', 'Find Next Char', and 'Re-calc'. Below these are 'Keyword Names' with four 'User Defined' fields. A red arrow points to the 'Documents' tab.

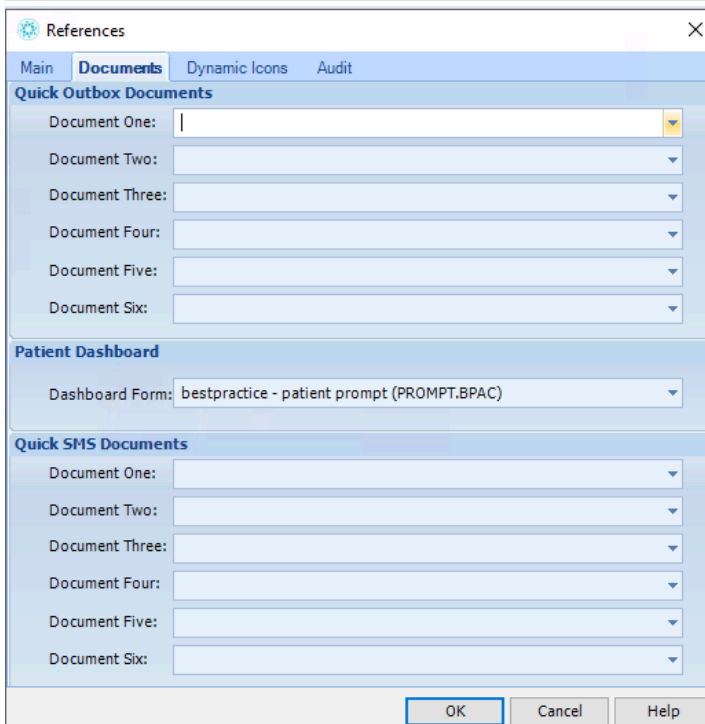
3. Click the 'Documents' tab

The screenshot shows the 'References' window with the 'Documents' tab selected. It contains sections for 'Quick Outbox Documents' (Document One to Six), 'Patient Dashboard' (Dashboard Form dropdown), and 'Quick SMS Documents' (Document One to Six). A red arrow points to the 'Dashboard Form' dropdown menu.

4. Click the 'Dashboard Form' dropdown



5. Click the '+' next to 'BestPractice' and select the 'Patient Prompt' option
6. Click 'OK'



7. Click 'OK' and a message will pop up stating that you need to exit Medtech for the changes to take effect.

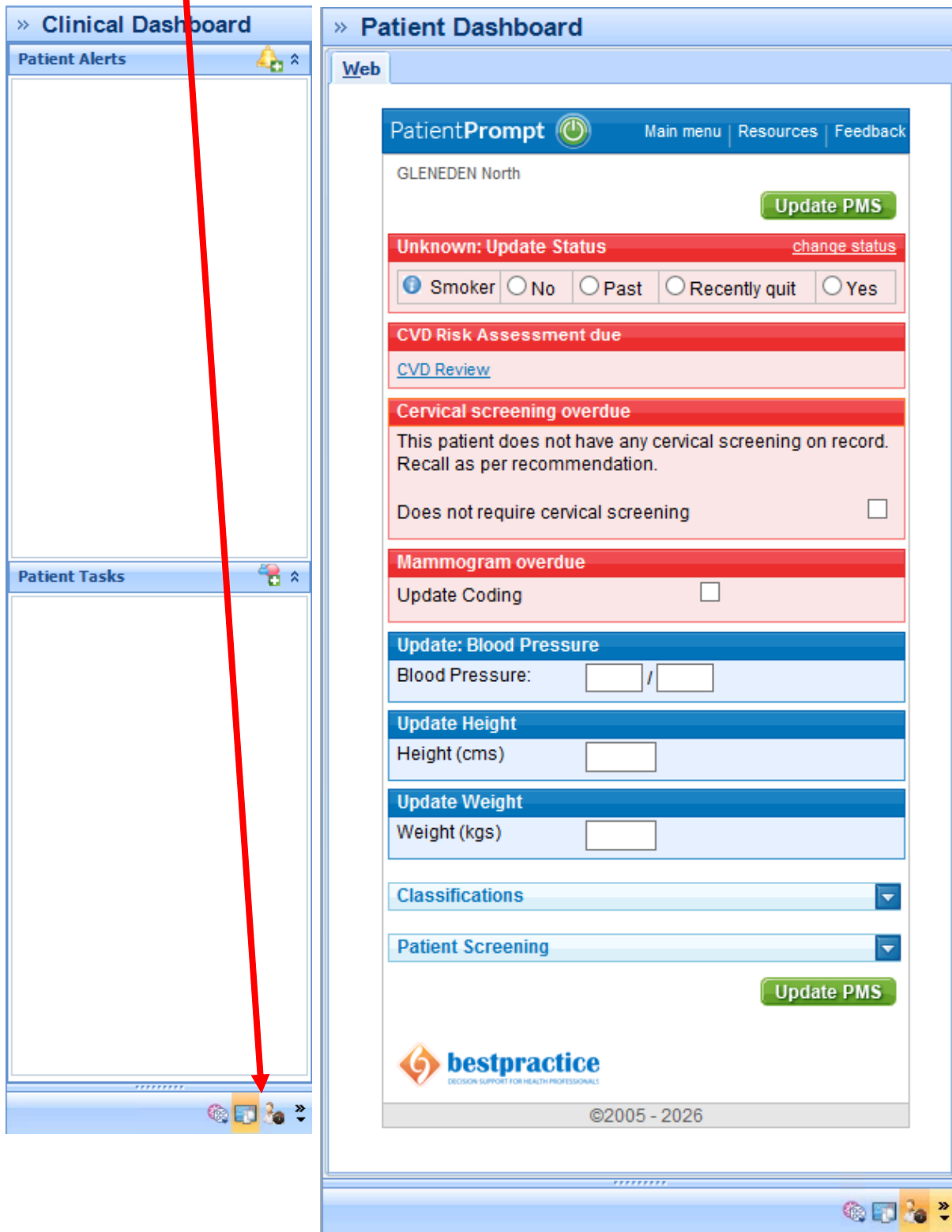


8. Click 'OK', close Medtech and reopen Medtech

9. After opening a patient record, if the Patient Dashboard is not the default dashboard, click the person icon in the 'Clinical Dashboard'

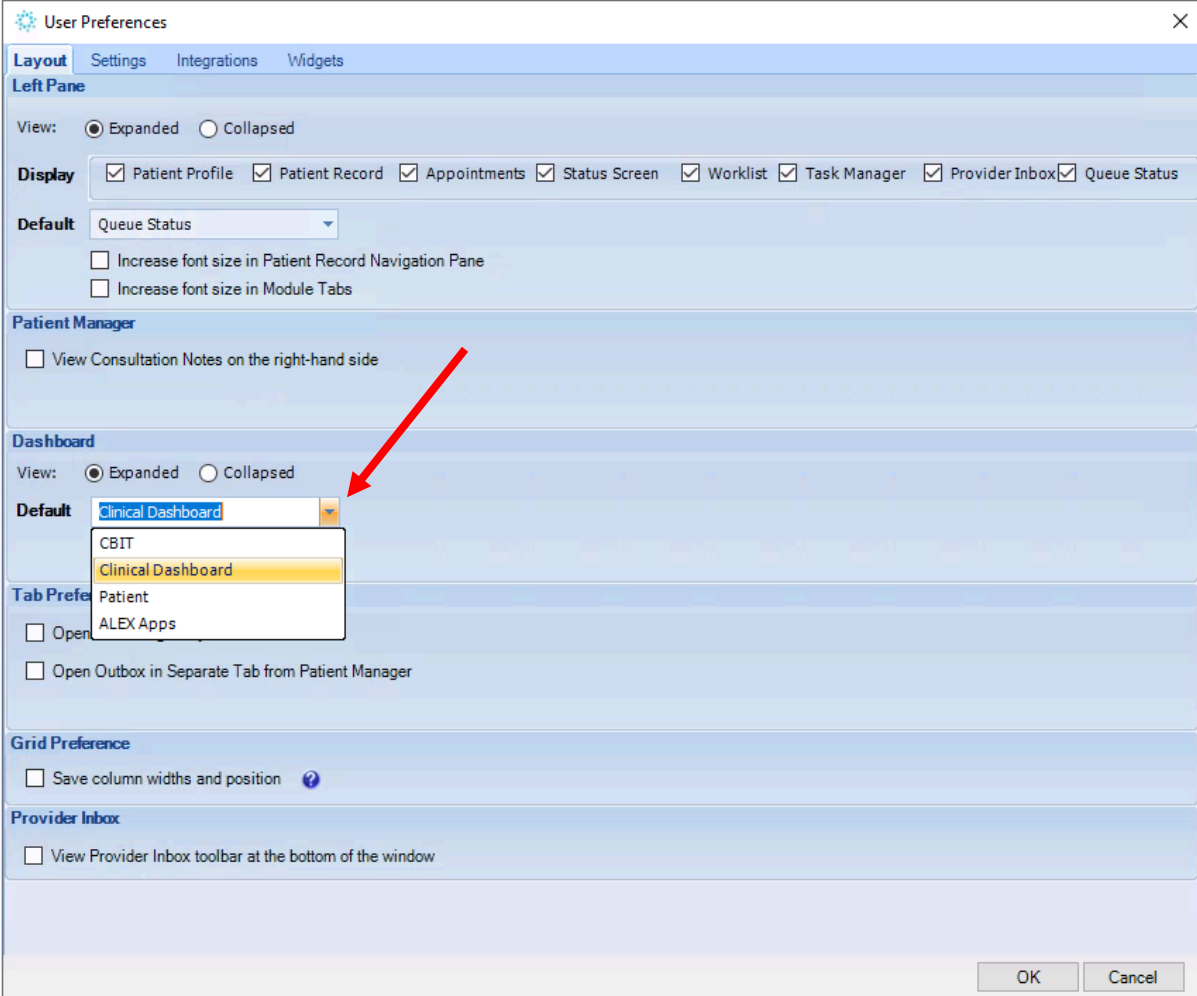
10. The BPAC Patient Prompt will be presented for that patient

NB: If the 'Patient Dashboard' is the default dashboard, you won't need to click the person icon. See the next section in this document for setting up the Patient Dashboard as the default dashboard.



## 2 Setting up the Patient Dashboard as the default dashboard

1. Options (Setup)
2. User Preferences



The screenshot shows the 'User Preferences' dialog box with the 'Layout' tab selected. The 'Dashboard' section is expanded, and the 'Default' dropdown menu is open, showing options: 'Clinical Dashboard', 'CBIT', and 'Patient'. A red arrow points to the 'Default' dropdown menu. The 'Patient' option is highlighted in yellow. Other sections visible include 'Left Pane', 'Patient Manager', 'Tab Preference', 'Grid Preference', and 'Provider Inbox'.

3. Under 'Dashboard' click the 'Default' drop down
4. Select 'Patient'

**User Preferences**

Layout Settings Integrations Widgets

**Left Pane**

View:  Expanded  Collapsed

**Display**  Patient Profile  Patient Record  Appointments  Status Screen  Worklist  Task Manager  Provider Inbox  Queue Status

**Default** Queue Status

Increase font size in Patient Record Navigation Pane

Increase font size in Module Tabs

**Patient Manager**

View Consultation Notes on the right-hand side

**Dashboard**

View:  Expanded  Collapsed

**Default** Patient

**Tab Preference**

Open Screening Entry in Tab

Open Outbox in Separate Tab from Patient Manager

**Grid Preference**

Save column widths and position

**Provider Inbox**

View Provider Inbox toolbar at the bottom of the window

OK Cancel

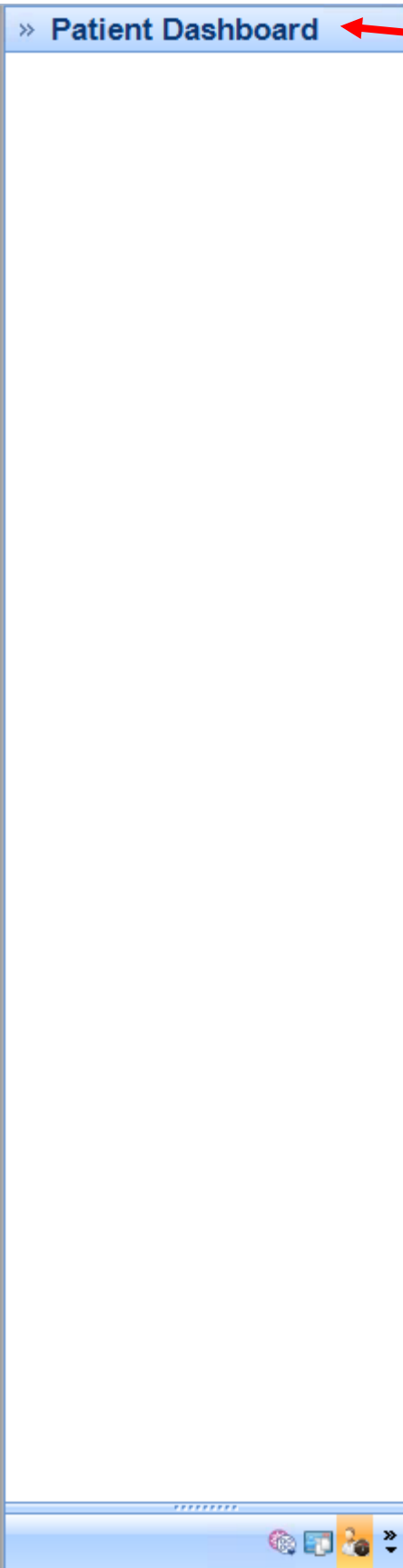
- Click 'OK' and a message will pop up stating that you need to exit Medtech for the changes to take effect.

**Information**

You must exit MedTech Evolution for these changes to take effect

OK

- Click 'OK', close Medtech and reopen Medtech



7. The 'Patient Dashboard' is now the default dashboard
8. Open a patient's record and the BPAC Patient Prompt for that patient will be presented in the Patient Dashboard

