



Training Guide:

My Patient Summary

Updated January, 2026

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The purpose and benefits of the My Patient Summary tool

My Patient Summary (MPS) is a customizable dashboard within the HIE Portal that lets each user create a personalized view of the patient information most relevant to their role and workflow. Instead of navigating across multiple tabs and subtabs to access specific data, MPS consolidates selected views into a single dashboard.

How it works:

- MPS is a tiled dashboard made up of pinned tabs or subtabs from elsewhere in the portal
- You can pin up to 8 items
- Each pinned item appears as its own window (tile)
- Tiles display live data and retain the same functionality as their original tab views
- Once configured, your layout applies across all patient charts you view

The screenshot displays the My Patient Summary tool interface for patient GILBERT GRAPE. The interface is a tiled dashboard with a navigation sidebar on the left and a main content area. The sidebar includes 'Reports & Applications' with sub-items: 'Clinical Information', 'PMP', and 'Consent Tool'. The main content area is titled 'HIE InContext' and 'MY PATIENT SUMMARY' for patient GILBERT GRAPE (Male, Jan 1, 1984). The dashboard features several tiles: 'All Encounters' (a table of medical encounters), 'Problems' (a list of medical conditions), 'Demographics' (patient information), and 'Health Records' (a table of lab and radiology results). A red box highlights the 'All Encounters' tile and the 'Problems' tile. The 'All Encounters' table lists encounters from 2023-08 to 2025-09-16, including sources like Adventist HealthCare and Howard University Hospital, and diagnoses such as 'Z02.89-Encounter for other administrative examinations' and 'T401X-Poisoning by and adverse effect of heroin'. The 'Problems' list includes conditions like 'TYPE 2 DIABETES MELLITUS WITHOUT COMPLICATIONS' and 'ABNORMAL CARDIOVASCULAR STRESS TEST'. The 'Demographics' section shows the patient's name, date of birth, gender, address, and email. The 'Health Records' section shows a table with columns for Date Collected, Source, Category, Description, and Provider, with one entry for 'Potassium SerPL- sDC' on 2023-06-27.

Date	Source	Patient Class	Diagnosis
2025-09-16	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.89-Encounter for other administrative examinations; Z02.89-Encounter for other administrative examinations
2025-09-09	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.89-Encounter for other administrative examinations; Z02.89-Encounter for other administrative examinations
2025-09-02	Adventist HealthCare Shady Grove Medical Center	Inpatient	—
2025-01-29	Howard University Hospital	Emergency	T401X-Poisoning by and adverse effect of heroin; T43624A-Poisoning by amphetamines, undetermined, initial
2025-01-28	MFA COVID RPM	Emergency	T43641A-Poisoning by ecstacy, accidental (unintentional), initial
2025-01-27	Howard University Hospital	Emergency	T424X4-Poisoning by benzodiazepines, undetermined
2024-03-28	Immaculate Medical Services, LLC	Ambulatory	—
2024-01-24	St. Mary's Loomis Health Department Referrals	Ambulatory	Thrive by Three
2023-08-09	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.89-Encounter for other administrative examinations; Z02.89-Encounter for other administrative examinations
2023-08-	Adventist HealthCare Shady Grove Medical	Ambulatory	E23.2-Diabetes insipidus; E23.2-Diabetes

Description	Code
TYPE 2 DIABETES MELLITUS WITHOUT COMPLICATIONS	E11.9
ABNORMAL CARDIOVASCULAR STRESS TEST	R94.39
TYPE 1 DIABETES MELLITUS WITHOUT COMPLICATIONS	E10.9
(INDUCED) TERMINATION OF PREGNANCY WITH OTHER COMPLICATIONS	O04.89
BIPOLAR 1 DISORDER, MANIC, MODERATE	F31.12
(IDIOPATHIC) NORMAL PRESSURE HYDROCEPHALUS	G91.2
NECK PAIN	M54.2
ACCELERATED HYPERTENSION	I10
ADJUSTMENT DISORDER WITH MIXED ANXIETY AND DEPRESSED MOOD	F43.23
HYPOTHYROIDISM, UNSPECIFIED	E03.9
ANEMIA, UNSPECIFIED	D64.9

Demographics

Name: GILBERT GRAPE
Date of Birth: Jan 1, 1984
Gender: Male
Address: 4145 Earl C Adkins Dr, RIVER, WV 26000
Email: AHCPatientPortalStaging1@gmail.com

Date Collected (AKT)	Source	Category	Description	Provider
2023-06-27	Adventist Healthcare White Oak Medical	Laboratory	Potassium SerPL- sDC	—

How to configure your My Patient Summary dashboard

Log into the HIE Portal & Open a Patient Chart

- Log into the HIE Portal (For organizations using Single Sign-On, the portal may also be accessed from within your Electronic Health Record (EHR) system.)
- Open any patient chart .

Important: Initial setup must be completed from within a patient chart. Once configured, your dashboard settings will carry over to all patient charts you access.

Select Tabs or Subtabs to Include

- Navigate through the available tabs and subtabs to locate the views most useful for your workflow.
- To add an item to your dashboard, click the pushpin icon next to the tab or subtab title to add it to MPS
- You may pin up to 8 total items.

Notes:

- A solid (filled) pin indicates the item is pinned. An empty pin indicates the item is not pinned.
- To remove an item, click the solid pin again to unpin it. This can be done from the original tab or from within My Patient Summary.
- If you're unfamiliar with the data contained in each tab, we recommend reviewing the Introduction to the HIE Portal guide or video.

HIE InContext **GILBERT GRAPE**
Male | Jan 1, 1984

HEALTH RECORDS ENCOUNTERS **PROBLEMS** STRUCTURED DOCUMENTS IMMUNIZATIONS ALLERGIES VITALS PROCEDURES

Problems 

Description	Code	First Reported Date	Last Reported Date ↓	Last Reported By
TYPE 2 DIABETES MELLITUS WITHOUT COMPLICATIONS	E11.9	—	2021-10-06	Adventist Ambulatory eCW Hub
ABNORMAL CARDIOVASCULAR STRESS TEST	R94.39	—	2021-10-06	Adventist Ambulatory eCW Hub
TYPE 1 DIABETES MELLITUS WITHOUT COMPLICATIONS	E10.9	—	2021-10-06	Adventist Ambulatory eCW Hub
(INDUCED) TERMINATION OF PREGNANCY WITH OTHER COMPLICATIONS	O04.89	—	2021-10-06	Adventist Ambulatory eCW Hub
BIPOLAR 1 DISORDER, MANIC, MODERATE	F31.12	—	2021-10-06	Adventist Ambulatory eCW Hub
(IDIOPATHIC) NORMAL PRESSURE HYDROCEPHALUS	G91.2	—	2021-10-06	Adventist Ambulatory eCW Hub
NECK PAIN	M54.2	—	2021-10-06	Adventist Ambulatory eCW Hub
ACCELERATED HYPERTENSION	I10	—	2021-10-06	Adventist Ambulatory eCW Hub
ADJUSTMENT DISORDER WITH MIXED ANXIETY AND DEPRESSED MOOD	F43.23	—	2021-10-06	Adventist Ambulatory eCW Hub
HYPOTHYROIDISM, UNSPECIFIED	E03.9	—	2021-10-06	Adventist Ambulatory eCW Hub
ANEMIA, UNSPECIFIED	D64.9	—	2021-10-06	Adventist Ambulatory eCW Hub

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Viewing and Rearranging Your Dashboard

Once you have pinned at least one item:

- Open the My Patient Summary tab from the patient navigation menu (1).
- Your dashboard will display tiled windows containing your pinned items.

Reordering tiles by:

- Hover over the tile or window you wish to move. A four-way arrow icon will appear in the top right (2).
- click and drag this icon to rearrange tiles in your preferred order.
- Your layout changes are saved automatically.

Date	Source	Patient Class	Diagnosis
2025-09-16	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.89-Encounter for other administrative examinations; Z02.89-Encounter for other administrative examinations
2025-09-09	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.89-Encounter for other administrative examinations; Z02.89-Encounter for other administrative examinations
2025-09-02	Adventist HealthCare Shady Grove Medical Center	Inpatient	—

Description	Code
TYPE 2 DIABETES MELLITUS WITHOUT COMPLICATIONS	E11.9
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NECK PAIN	M54.2
ACCELERATED HYPERTENSION	I10
ADJUSTMENT DISORDER WITH MIXED ANXIETY AND DEPRESSED MOOD	F43.23

Setting My Patient Summary as Your Default View

- Navigate to User Settings (3). You will see a hierarchical list of patient menu items.
- Use the arrows (4) to reorder the list. Move My Patient Summary to the top of the list to make it your default view.
- Click Save (5) to apply your changes.

Once saved, My Patient Summary will open automatically when you access a patient chart.

Tab Order

Your current default landing tab for each patient search is **Clinical Data**.

- Clinical Data (Subtabs: Health Records, Encounters, Problems, Structured Documents, Immunizations, Allergies, Vitals, Procedures)
- Social Needs Data (Subtabs: Conditions)
- My Patient Summary (Subtabs: My Patient Summary)
- Medication Management (Subtabs: Reported Medications)
- Care Coordination (Subtabs: Care Team)

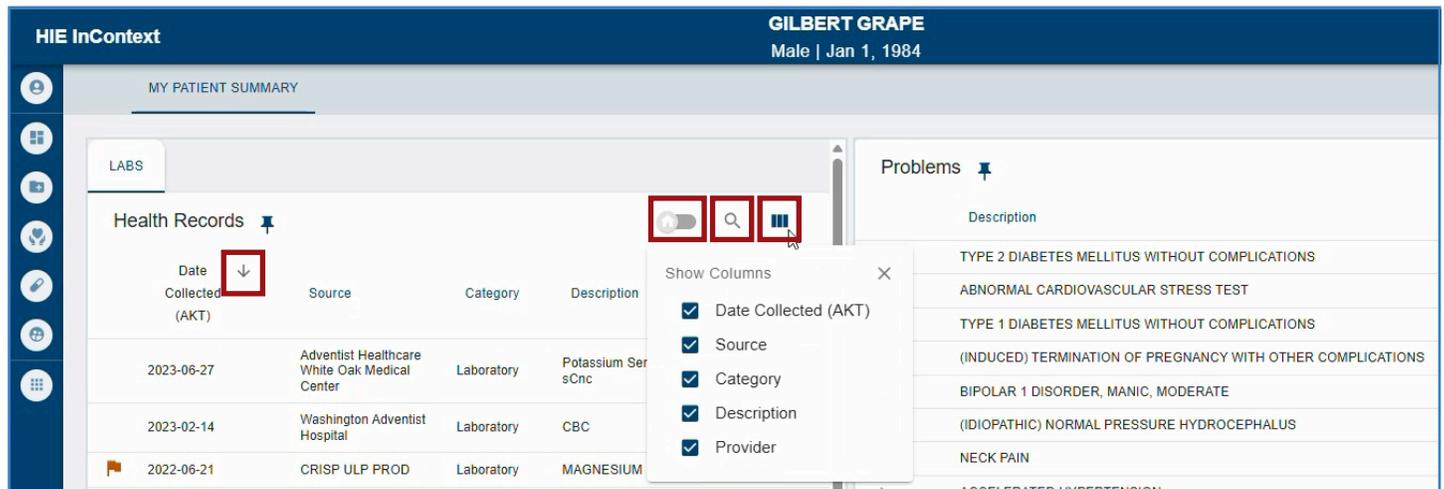
SAVE

Helpful tips for Using and Managing your Dashboard

Using Data Controls Within My Patient Summary

All standard data controls remain available within pinned tiles, including:

- Search
- Sort
- Column display options
- Hide My Organization Data (when applicable)
- These controls function the same way they do in their original tab locations.



Accessing Built-In Instructions

Quick reference instructions are always available within My Patient Summary (6).

- Click the retractable drawer labeled Definitions in the top-right corner of the dashboard.
- This instruction panel (7) remains available whenever at least one tab is pinned.

