NOTES

- Dashboards are in setup, so user must have clinical setup access.
- Dashboard scoping is directly related to the scope of the staff position for which you are creating the dashboard.
- You must create the same dashboard for each position who will need access to view or print it.
- Users require security to dashboard panes selected in the layouts. Users who do not have security do not see the dashboard pane.

Procedure

1. Do one of the following:
   - Single facility: Clinical > Setup > Standard Dashboard Layout.
   - Multi-facility: Management Console > Standards > Care Management > Standard Dashboard Layout.

Flow Sheet Types

Tasks
Task Library
Standard Documentation Frequencies

Dashboards
Standard Dashboard Layouts

At this point, you can either edit existing resident dashboards if you have created them already and add NEW VIEW or create a new dashboard.

2. For existing resident dashboards, click edit (go to step 5), for new click New Layout.
3. Select Position
4. Select Resident as Dashboard type.

Editing Dashboard Layout

Position: Director of Operations

Dashboard Type: Resident Dashboard

Views

Main

Current View Description: Resident Summary

5. Select New View to add to existing resident dashboards.
6. Change the Current View Description to "Resident Summary" or your preferred language.
7. Check the panes that you want on the view.

Editing Dashboard Layout

Position: Director of Operations
Dashboard Type: Resident Dashboard

Views   New View

Main

Current View Description: Resident Summary

(x2) - Item Requires 2 Columns

Dashboard Items   **Layout Preview**

- ☑ Most Recent Vitals
- ☑ Proceed to Care Plan RAPs/CAAs
- ☑ Diet
- ☑ Activities of Daily Living
- ☑ MDS Scores
- ☑ UDA Scores
- ☐ High Priority Progress Notes
- ☑ Advance Directive
- ☐ Scheduled Events
- ☐ CP Goals Due/Overdue
- ☑ Medications
- ☑ Quality Indicators and Quality Measures
- ☑ Resident Photo
- ☐ T/P/R Graph
- ☐ Blood Pressure Graph
- ☐ Alerts (x2)
- ☑ Therapy Minutes Summary In The Last 7 Days
- ☐ General Notes (x2)
- ☐ Progress Notes in Last 30 Days
- ☑ Active Diagnoses
- ☑ Census Summary
- ☑ Active Allergies
- ☑ Laboratory Results
- ☐ POC Unscheduled Task Alerts (x2)
- ☐ Order Alerts (x2)
- ☐ Undocumented PRN Orders (x2)
- ☐ Unreviewed Radiology Results
- ☑ Administered PRN Orders - Resident
- ☐ COT Alerts (x2)
- ☑ Antibiotic Medication (x2)
- ☑ Psychotropic Medication (x2)

Layout Preview panes: Most Recent Vitals | Proceed to Care Plan RAPs/CAAs; Diet | Activities of Daily Living; MDS Scores | UDA Scores; Advance Directive; Medications | Quality Indicators and Quality Measures; Resident Photo; Therapy Minutes Summary In The Last 7 Days; Active Diagnoses; Census Summary | Active Allergies

Save & Close   Save   Cancel

8. Move them into order by clicking and dragging the panes on the screen.
9. Click Save.
10. Click Enforce to assign newest changes to existing positions.

Hints and Tips

- Panes in each view can be dragged and dropped into side by side or standalone positions.
- The timkristkes two (x2) indicates that the pane covers the entire width of the page.
- Enforcing dashboard layouts to a position forces the layout setup to all users. Users with security can edit their own layouts and view.