

# Storyboard: Personalize & Make it Yours

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# STORYBOARD FOR PROVIDERS

Storyboard gives you easy access to a patient's story, no matter where you are in their chart. Review key information, hover for additional detail, and click to take action.

## Try It Out: Storyboard Basics

Open a patient's chart. Storyboard appears on the left side of the screen, and the activity tabs appear at the top of the screen.

A. Hover over any item in Storyboard to see more. You also can hover over an icon to determine what an icon signifies.

**Click hyperlinks in Storyboard to jump to an activity to see more detail or take action.**

B. Click the back arrow to get back to where you were.

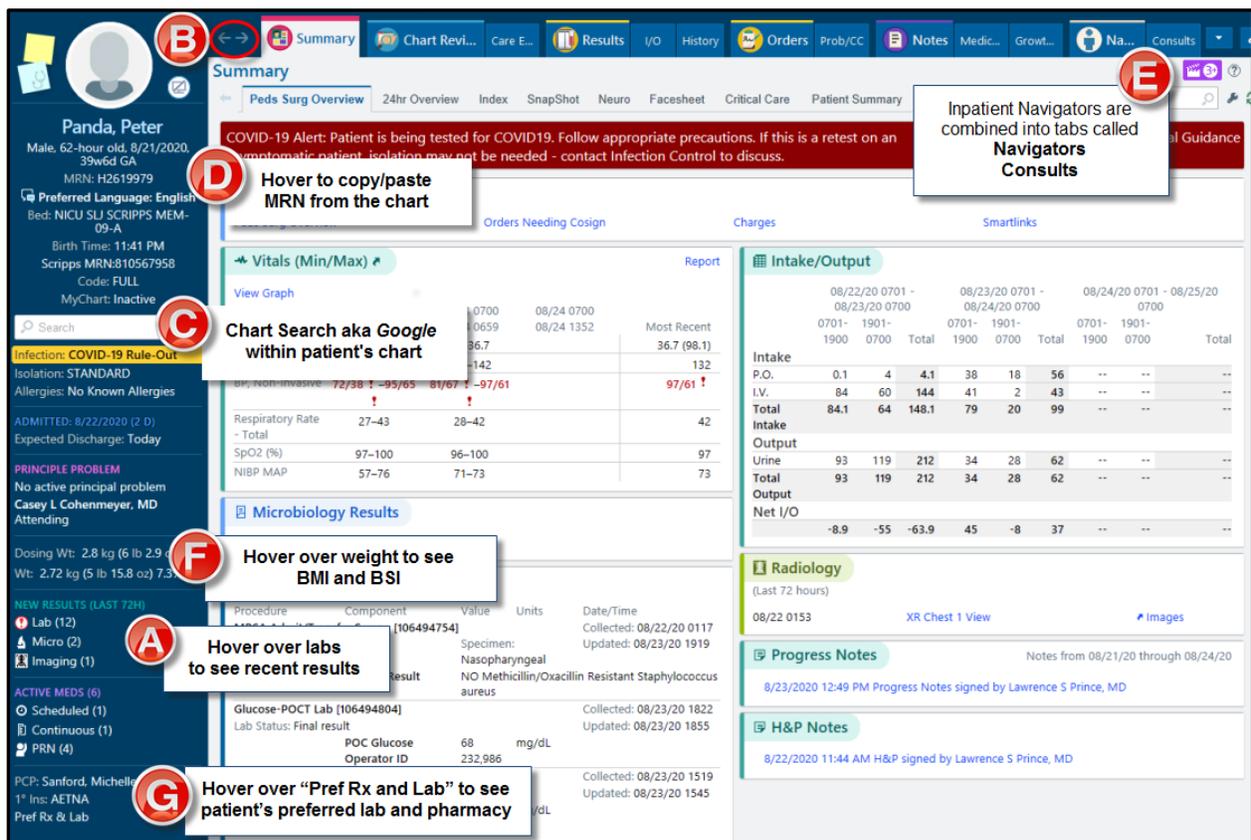
C. Use Chart Search to find the information you're looking for. For example, enter "CBC" to search the patient's chart for prior lab results.

D. Copy the MRN, CSN, HAR from the hover bubble. You cannot copy the MRN directly from the storyboard.

E. Inpatient Navigators are combined into tabs called **Navigators | Consults**.

F. Hover over weight to see BMI and BSI.

G. Hover over "Pref Rx and Lab" to see patient's preferred lab and pharmacy.



The screenshot shows a patient's medical storyboard for Peter Panda. The interface includes a patient profile on the left, a central summary area with various tabs (Vitals, Microbiology Results, etc.), and a right-hand sidebar with tabs for Intake/Output, Radiology, Progress Notes, and H&P Notes. Callouts A through G highlight specific features: A (hover over labs), B (back arrow), C (chart search), D (copy MRN), E (inpatient navigators), F (weight hover), and G (preferred lab and pharmacy).

**Callout A:** Hover over labs to see recent results

**Callout B:** Click the back arrow to get back to where you were.

**Callout C:** Chart Search aka Google within patient's chart

**Callout D:** Hover to copy/paste MRN from the chart

**Callout E:** Inpatient Navigators are combined into tabs called Navigators | Consults

**Callout F:** Hover over weight to see BMI and BSI

**Callout G:** Hover over "Pref Rx and Lab" to see patient's preferred lab and pharmacy

## Try It Out: Review Patient Identity Information

A patient's preferred name, if they have one, always appears in Storyboard. The preferred name appears first with the legal name below it. If there is a preferred gender it appears under the Gender/Age/Dob Info.

Hover over preferred gender to see more detailed information, including the patient's legal name, preferred pronouns, legal sex, and sex assigned at birth.

**Home Health, Bennie**

Legal: **Home Health, Charlie**

Male, 11 y.o., 4/29/2009

**Prof Gender - Female**

MRN: H3011682

**Preferred Language: English**

Bed: 2 ROSE-210-01

Code: Not on file

**Home Health, Bennie** (Preferred)

**Home Health, Charlie** (Legal)

11 y.o., 4/29/2009

Gender identity: Female (sensitive)

Legal sex: Male (sensitive)

Sex assigned at birth: Male (sensitive)

Marital Status: Single

MRN: H3011682

CSN: 80098235

HAR: 826297

BS
Chart Review
SnapShot
Summary
Results
MAR
Notes
Review Visit

**Sidebar, Becca**

Female, 12 y.o., 12/20/2007

**Prof Gender - Transgender Male**

MRN: H3011425

**Preferred Language: English**

Bed: 2 ROSE-203-01

Code: Prior

Search

**PRECAUTIONS**

Moderate Risk - VTE Precaution

**Order Sets**

**Orders**

VTE Prevention Moderate Risk - Contraindications to Sequential Compress

**Sidebar, Becca** (Legal)

12 y.o., 12/20/2007

Gender identity: Transgender Male (sensitive)

Legal sex: Female (sensitive)

Marital Status: Single

MRN: H3011425

CSN: 80096373

HAR: 825186

Room and Bed: 2R203, 203-01

Current location: CHN MAIN CAMPUS

15th street

MADISON WI 53703

608-293-4444 (Home Phone)

## Try It Out: Review Treatment Team and Send a message

A. Hover over the attending provider information to see the patient's full treatment team and their contact information. The team pager number for provider care teams appears, when available.

B. Start a Secure Chat right from the hover bubble with individual providers or a provider care team, when Secure Chat is available for those providers.

The screenshot shows a medical interface with a search bar at the top left. Below it, the profile of Cynthia L Kuelbs, MD, is displayed. A red circle with the letter 'A' is overlaid on the profile picture. The profile includes the text 'COVID-19: Unknown' and 'Isolation: None'. Below this, the 'ALLERGIES' section shows 'No Known Allergies'. To the right, a 'Suggested' section is visible, featuring a 'Treatment Team' header. Under this header, two team members are listed: Cynthia L Kuelbs, MD (Attending, Since 6/25/2020, 858-966-5803, 858-493-7294) and RADY, NURSEONE (Registered Nurse, Since 6/25/2020). A red circle with the letter 'B' is overlaid on the 'New chat' link at the bottom of the team list.

## Try It Out: Customize Storyboard

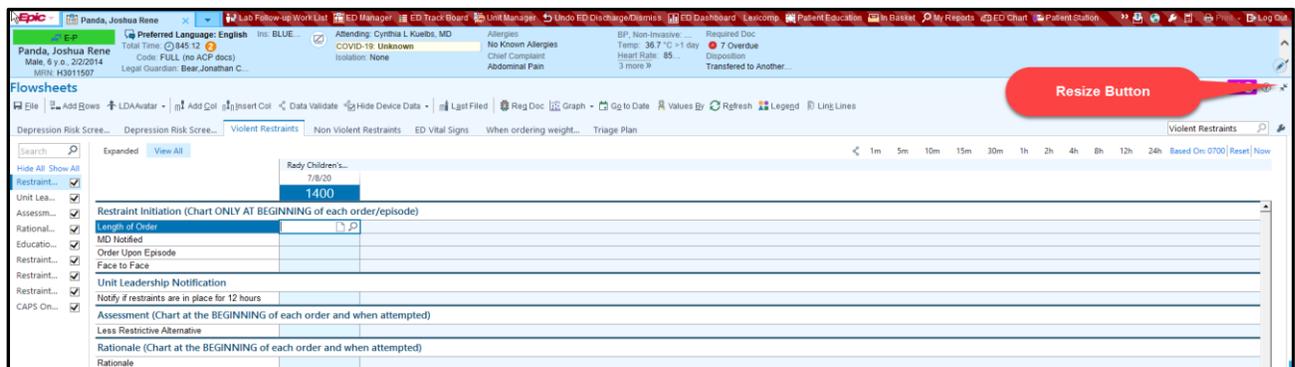
You can customize Storyboard to best suit your needs. There are a few ways you can customize storyboard.

Right click anywhere in Storyboard to be brought to menu.

- Refresh** Storyboard updates automatically. You can manually refresh by right clicking anywhere in storyboard and selecting refresh.
- Copy** You can copy the data over which you are hovering.
- Width** You can customize Storyboard width as needed based on your monitor size as needed. Select Auto, Narrow or Wide width.



- If you are frequently in data dense activities such as flowsheets or results review, you can use the resize options near the upper right corner to widen activity to full screen. This will flip the storyboard to a horizontal header across the top of your workspace. Resize again to flip storyboard back when you are done in activity. Everything that appears in storyboard will not appear in horizontal header.



## Try It Out: Customize Your Horizontal Activity Tabs

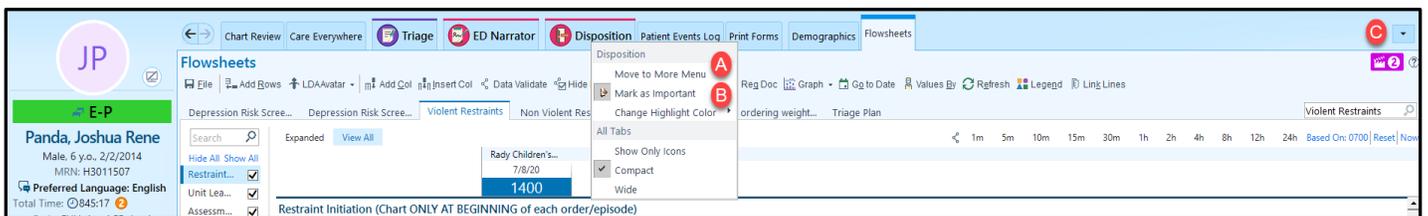
With Storyboard, your activity tabs now appear across the top of the screen, and you can customize those tabs to best suit your needs. Tabs you don't use very often have been automatically moved to the More menu to simplify your screen. It is recommended that you only have the activities you use most often as tabs and move the other tabs to More menu. This will ensure you can easily see the tabs. If you have a small computer screen the activity tabs will be smaller and part of the wording will be cut off. When you customize your activity tabs you will see the changes in each patients chart you open.

Right-clicking an activity tab opens a tab customization menu.

A. Click Move to More Menu to move your less commonly used activity tabs to the More menu.

B. Use Mark as Important to add an icon and make the activity tab stand out.

C. Click the arrow to open the More menu.



## Try It Out: Use the Wrench

With Storyboard, your activity tabs now appear across the top of the screen, and you can customize those tabs to best suit your needs. Tabs you don't use very often have been automatically moved to the More menu to simplify your screen.

- A. Click the wrench icon at the top right of the screen to open the Customize activity.
  - You can rearrange, add, or remove activities.
  - Change the size of tabs and add or remove icons from a tab.
  - Switch to icon only tabs.
  - Review your own usage statistics to help guide customization.
  - To see recommendations based on your usage, you can click the Optimize to Usage button.
  - You can also right-click activity tabs directly in the toolbar to update their formatting.
- B. Follow the directions on the screen to drag and drop activity tabs to a different spot across the top of the screen or into the More menu. The more menu can be a place for rarely used activities.

The screenshot shows the 'Modify Workspace: Admission' interface in Epic. The top toolbar contains tabs for Summary, Chart Review, Results, I/O, History, Orders, Prob/CC, Notes, Medications, Growth Chart, and Navigators. A 'More' menu is open on the right, listing various activities such as Allergies, Enter/Edit Results, Episodes of Care, FYI, Health Maintenance, Images, Reference, Validate Data by..., Advance Care Pla..., Bilirubin, BPA Review, Care Everywhere, Care Team, Charge Router Ch..., and Document Content. A 'Rarely Used' section is visible at the bottom of the 'More' menu. Handwritten annotations include: 'Occasionally used items go here' pointing to the 'More' menu; 'Drag and drop to rearrange tabs' with a red circle 'B' pointing to the toolbar; 'Drag and drop between menus' with a red circle 'B' pointing to the 'More' menu; and 'Good spot for things you don't use' with a red circle 'A' pointing to the 'More' menu. A 'Rarely Used' section is visible at the bottom of the 'More' menu.