

Menu Configuration

Empowering Extraordinary Patient Care

Embrace the new world of healthcare



Your phone has been automatically muted. Please use the Q&A panel to ask questions.

The screenshot shows a webcast application window. The main content area displays a slide titled "Embrace the new world of healthcare" with the Galen logo and text: "The webcast will begin momentarily...". The slide content is divided into three sections: "PROFESSIONAL Services" (Project Assessment, Project Management), "Implementation Services", and "Connecting Community Healthcare". A red arrow points from the main content area to a red-bordered box on the right side of the interface. This box contains the "Q&A" panel, which has a "Collapse the panel" button at the top. Below this, there is a text input field with a placeholder message: "Select a participant in the ask menu first and type your question here. There is a 256 character limit." and a "Send" button. The "Ask:" dropdown menu is set to "All Panelists". The "Participants" panel on the right shows a list of participants, including "Galen Healthcare Solutions (host)" and "Tracy Kimble".

Agenda

- **Overview of Menus**
- **Best Practices for creating Menus**
- **Creating a new Menu/Workplace**
- **Assigning Workplaces**

Overview: Menus

- **Menus consist of:**
 - The Workplace (WP)
 - The Vertical Tool Bar (VTB)
 - The Horizontal Tool Bar (HTB)

Overview: Menus

- **Workplaces are comprised of Vertical Toolbars**
- **Vertical Toolbars are comprised of Horizontal Toolbars**
- **Horizontal Toolbars are comprised of Documents**

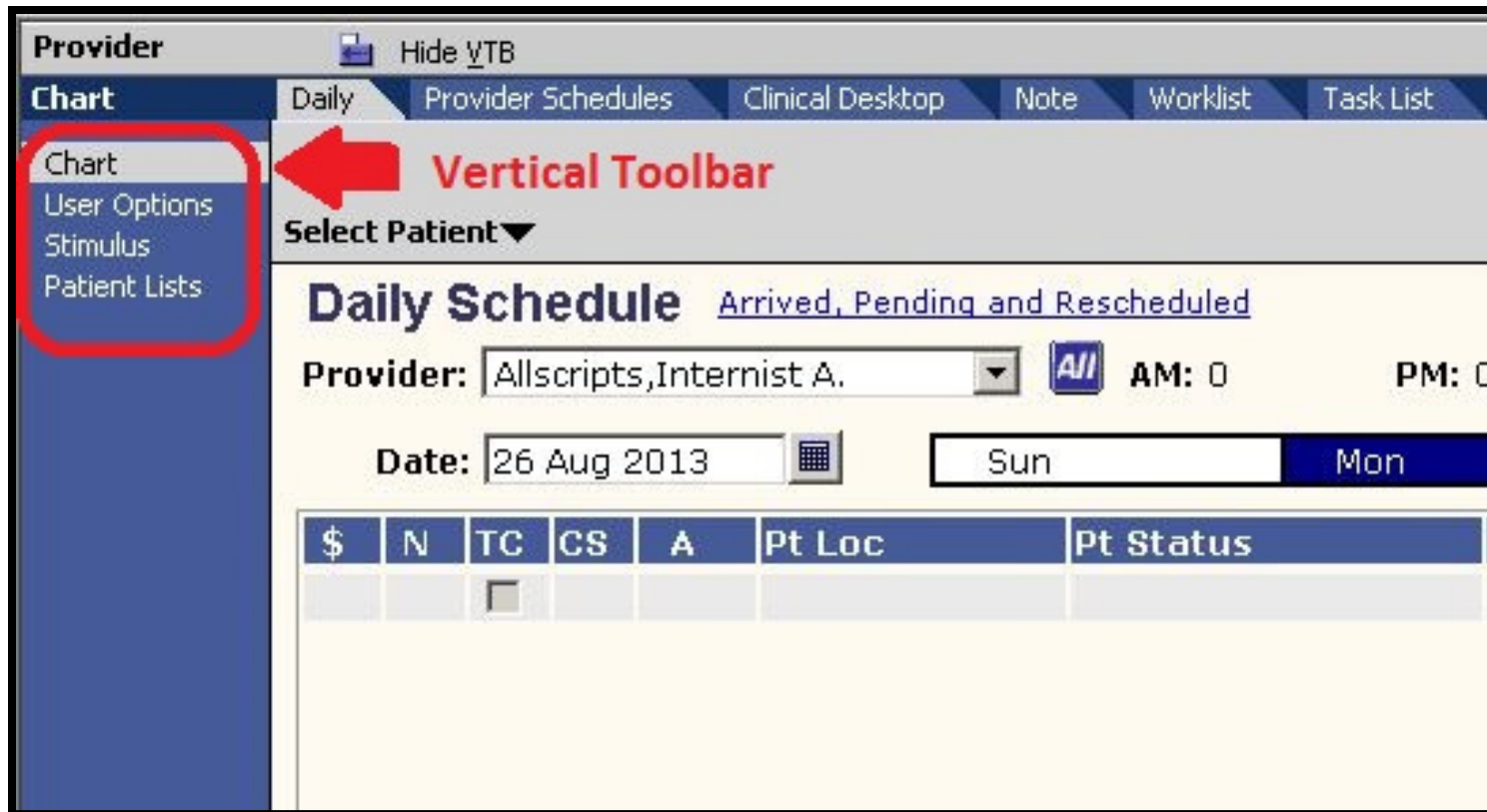
Overview: Menus

- **A Workplace is the screen configuration a user sees when they are logged in to Allscripts Enterprise**

Overview: Menus

- The Vertical Toolbar (VTB) is the toolbar that is located down the left-hand side of the screen. This toolbar shows links to different Horizontal Toolbar configurations.

Overview: Menus



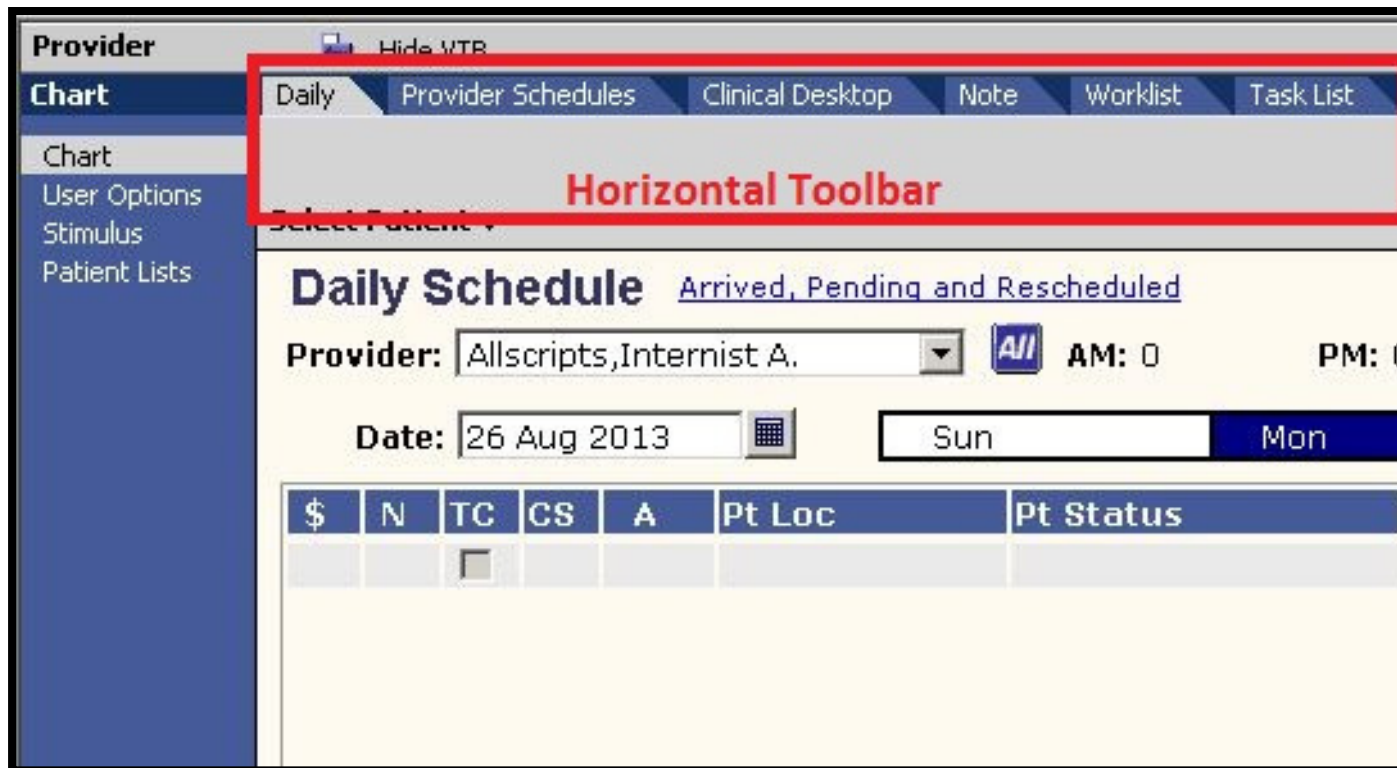
The screenshot displays the GALEN healthcare software interface. On the left, a vertical toolbar is highlighted with a red box and a red arrow pointing to it from the text 'Vertical Toolbar'. The toolbar contains the following items: 'Chart', 'User Options', 'Stimulus', and 'Patient Lists'. The main window is titled 'Provider' and has a 'Hide VTB' button. Below the title bar, there are tabs for 'Daily', 'Provider Schedules', 'Clinical Desktop', 'Note', 'Worklist', and 'Task List'. The 'Daily' tab is selected. The main content area shows a 'Select Patient' dropdown menu. Below this, there is a section titled 'Daily Schedule' with a link 'Arrived, Pending and Rescheduled'. The 'Provider' field is set to 'Allscripts, Internist A.' with a dropdown arrow and a 'All' button. The 'Date' field is set to '26 Aug 2013' with a calendar icon. The 'AM: 0' and 'PM: 0' fields are also visible. At the bottom, there is a table with columns: '\$', 'N', 'TC', 'CS', 'A', 'Pt Loc', and 'Pt Status'. The table has one row with a checkbox in the 'TC' column.

\$	N	TC	CS	A	Pt Loc	Pt Status
		<input type="checkbox"/>				


Overview: Menus

- The Horizontal Toolbar (HTB) contains multiple tabs across the top of the user's screen

Overview: Menus



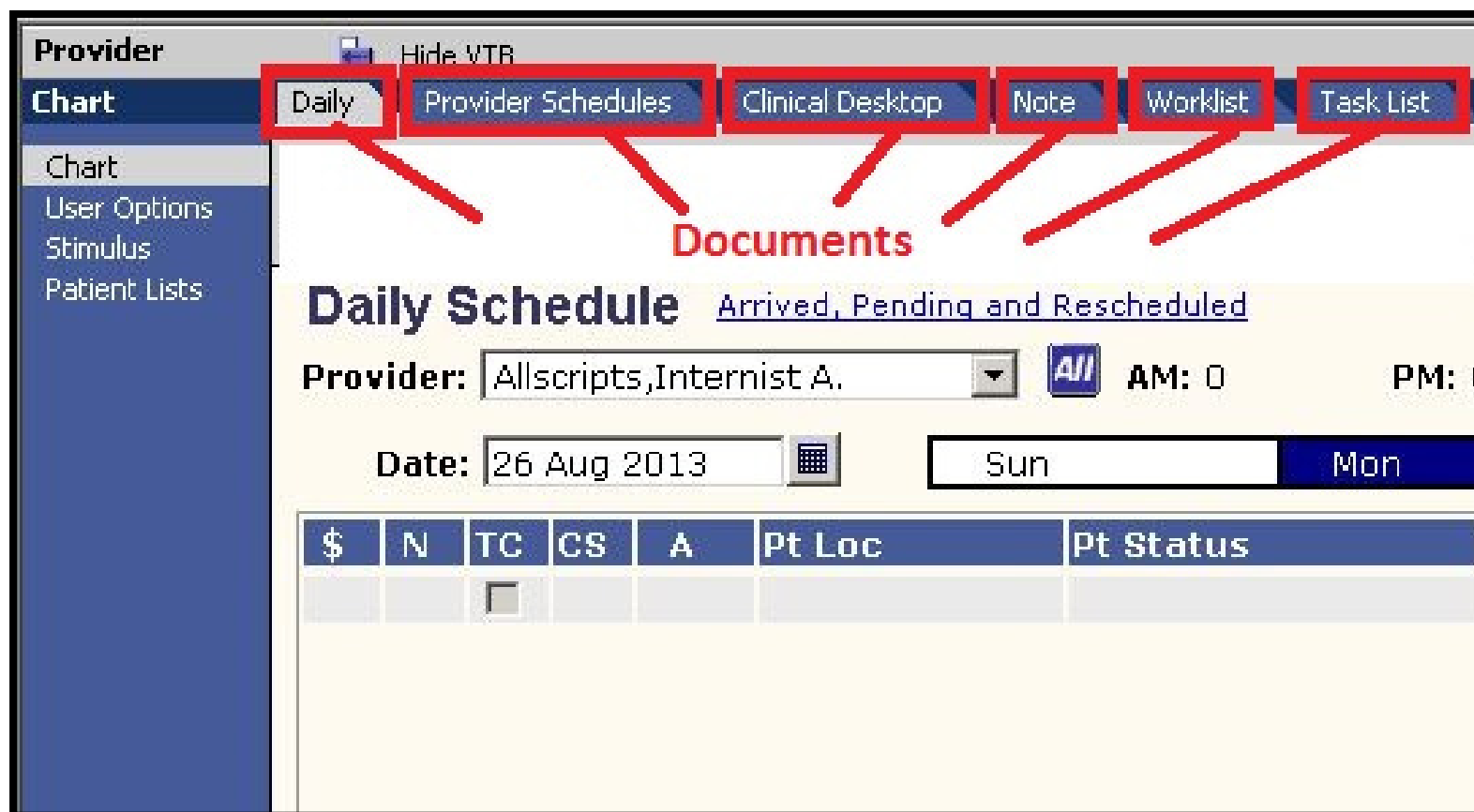
The screenshot displays the GALEN healthcare software interface. A red box highlights the 'Horizontal Toolbar' located at the top of the main content area. The toolbar contains several tabs: 'Daily', 'Provider Schedules', 'Clinical Desktop', 'Note', 'Worklist', and 'Task List'. Below the toolbar, the 'Daily Schedule' section is visible, featuring a dropdown menu for 'Provider' (set to 'Allscripts, Internist A.'), a date selector (set to '26 Aug 2013'), and a day selector (set to 'Sun'). The 'Daily Schedule' section also includes a table with columns for '\$', 'N', 'TC', 'CS', 'A', 'Pt Loc', and 'Pt Status'. The 'TC' column contains a small icon.

\$	N	TC	CS	A	Pt Loc	Pt Status
						

Overview: Menus

- **Documents are used to create the appearance of tabs across the HTB. These documents contain the different functionalities of Allscripts Enterprise**

Overview: Menus



Provider Hide VTR

Chart **Daily** **Provider Schedules** **Clinical Desktop** **Note** **Worklist** **Task List**

Documents

Daily Schedule [Arrived, Pending and Rescheduled](#)

Provider: Allscripts, Internist A. **All** **AM:** 0 **PM:** 0

Date: 26 Aug 2013 **Sun** **Mon**

\$	N	TC	CS	A	Pt Loc	Pt Status
		<input type="checkbox"/>				

Best Practices

- **Create Menus that are Role Specific**
- **Do not use the default menus provided. These may revert back to their defaults during an upgrade/service pack install**
- **Use a naming convention that includes your Organization's mnemonic, role, and menu type**
 - Ex: GHS_Clinical_WP

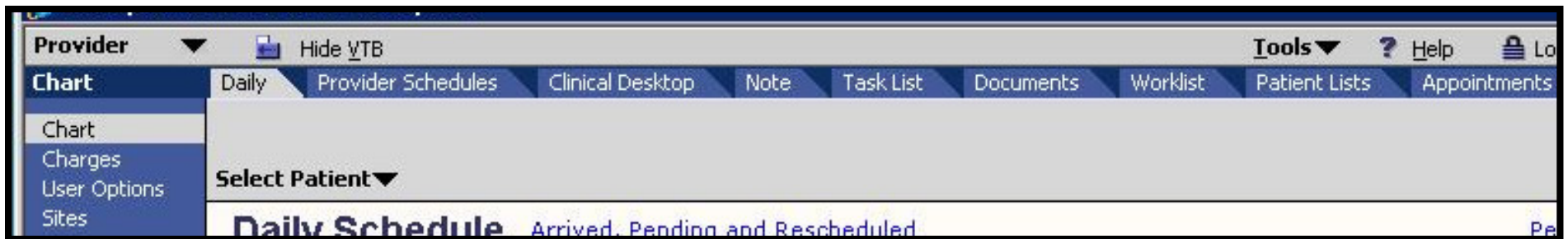
Best Practices

- **Build Menus from the bottom up**
 - **Verify Documents are Active**
 - **Start by building your HTB**
 - **Follow by building your VTB**
 - **Lastly, build your WP**

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Provider Workplace Example



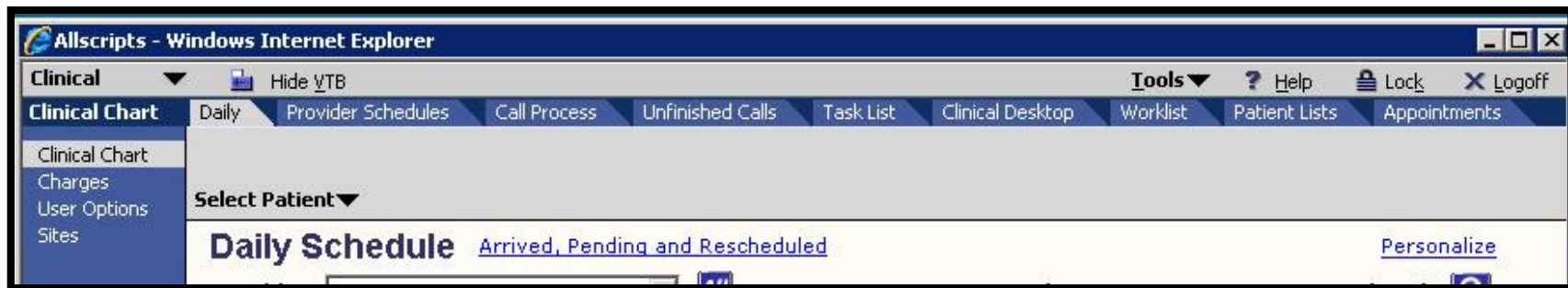
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Clinical Workplace Example



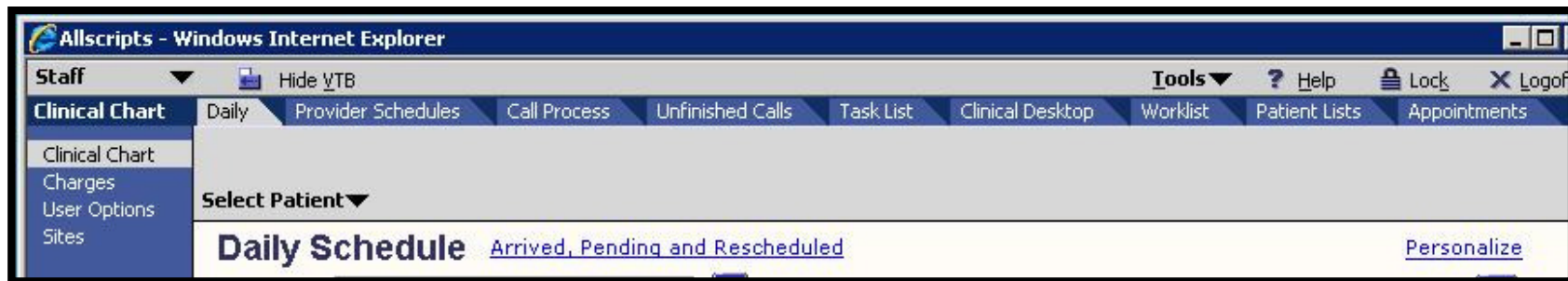
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Staff Workplace Example



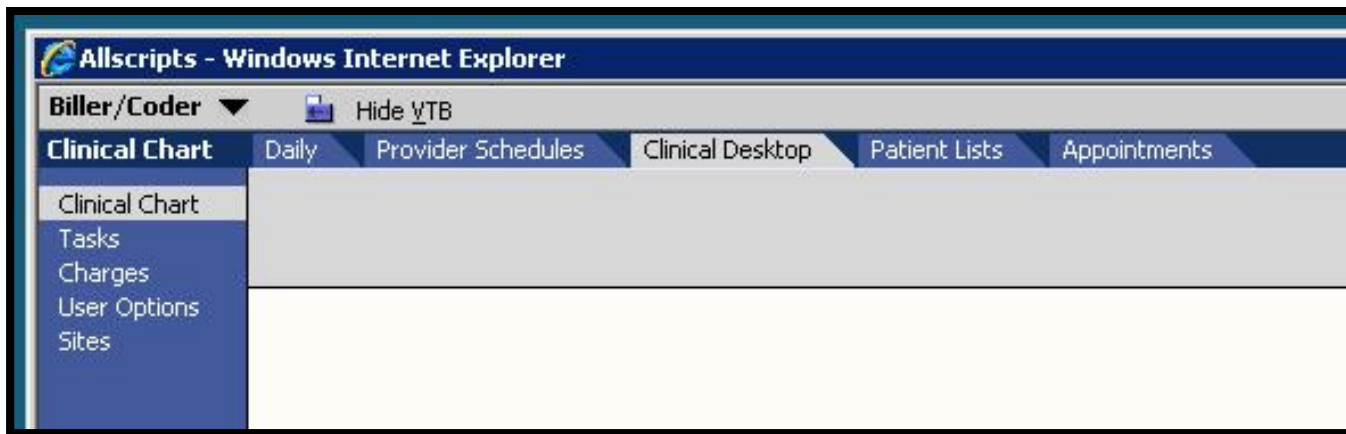
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Coder Workplace Example



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Creating Menus

- **Menus are created in the Admin workplace**
 - Users creating Menus will need full Administrative privileges
- **Before creating a menu, verify all required documents are “Active”**
 - To verify documents are Active, navigate to the “Document” tab in the Admin workplace
 - Perform a search for all required Documents
 - » To check Active status of a document, click the document to bring it in context, then click the “Edit” tab. Verify the “Active” checkbox is checked.

Creating Menus

- **Build the Horizontal Toolbar**
 - From the Admin WP, click menus.
 - Click New.
 - Fill in appropriate items
 - Click “Save”
 - After clicking “Save”, there will be a pop-up asking “Do you wish to specify Menu items...” Click “OK”
 - Add enough new menu items for each required Document that will be placed in the HTB
 - Verify the dropdown says “Documents”
 - Click the ellipses and search for the appropriate documents

Creating Menus

- **Build the Horizontal Toolbar (Continued)**
 - Continue adding documents until all necessary items are added
 - Click “Save”
 - With the newly created HTB in context, click the “Edit” tab
 - Click the ellipsis beside the “Default Document” field. The default document is the tab that the HTB will open to every time the HTB is selected.
 - Search for the document you want to be defaulted & select the document
 - Click Save to save the HTB.

Creating Menus

- **Build the Vertical Toolbar**
 - From the Admin WP, click menus.
 - Click New.
 - Fill in appropriate items
 - Click “Save”
 - After clicking “Save”, there will be a pop-up asking “Do you wish to specify Menu items...” Click “OK”
 - Add enough new menu items for each HTB/Document you wish to add to the VTB
 - Verify the dropdown says “HTB”
 - Click the ellipses and search for the appropriate HTBs

Creating Menus

- **Build the Vertical Toolbar (Continued)**
 - Continue adding until all necessary HTBs are added
 - Click “Save”
 - With the newly created VTB in context, click the “Edit” tab
 - Click the ellipsis beside the “Default HTB” field. The default HTB is the toolbar that the VTB will open to every time the user logs in, or that VTB is selected
 - Search for the HTB you want to be defaulted & select the HTB
 - Click Save to save the VTB.

Creating Menus

- **Build the Workplace**
 - From the Admin WP, click menus.
 - Click New.
 - Fill in appropriate items
 - Click “Save”
 - After clicking “Save”, there will be a pop-up asking “Do you wish to specify Menu items...” Click “OK”
 - Add enough new menu items for each VTB you wish to add to the WP (Typically this will be only 1)
 - Verify the dropdown says “VTB”
 - Click the ellipses and search for the appropriate VTBs

Creating Menus

- **Build the Workplace (Continued)**
 - Continue adding until all necessary VTBs are added
 - Click “Save”
 - With the newly created WP in context, click the “Edit” tab
 - Click the ellipsis beside the “Default VTB” field. The default VTB is the toolbar that the WP will open to every time the user logs in
 - Search for the VTB you want to be defaulted & select the VTB
 - Click Save to save the WP.

Editing Menus

- **Editing a HTB**

- Find the HTB needing editing & bring it into context.
- To add or remove documents, select the “menu items” tab at the top.
- To remove a document, click Delete beside the appropriate document, then click Save.
- To add a document, click Add, then use the ellipsis to search for the appropriate document as before, then click Save,
- To insert a document between 2 existing documents in the HTB, click Insert on the document you wish to appear after your newly inserted document. This will insert a menu item box before that item. Then use the ellipsis to find the appropriate document, as before, then click Save.

Editing Menus

- **Editing a VTB**

- Find the VTB needing editing & bring it into context.
- To add or remove HTBs/documents, select the “menu items” tab at the top.
- To remove a HTB, click Delete beside the appropriate HTB, then click Save.
- To add a HTB, click Add, then use the ellipsis to search for the appropriate HTB as before, then click Save.
- To insert a HTB between 2 existing HTB in the VTB, click Insert on the item you wish to appear after your newly inserted HTB. This will insert a menu item box before that item. Then use the ellipsis to find the appropriate HTB, as before, then click Save.

Editing Menus

- **Editing a WP**

- Find the WP needing editing & bring it into context.
- To add or remove VTBs, select the “menu items” tab at the top.
- To remove a VTB, click Delete beside the appropriate VTB, then click Save.
- To add a VTB, click Add, then use the ellipsis to search for the appropriate VTB as before, then click Save.
- To insert a VTB between 2 existing VTB in the WP, click Insert on the item you wish to appear after your newly inserted VTB. This will insert a menu item box before that item. Then use the ellipsis to find the appropriate VTB, as before, then click Save.

Assigning Workplaces

- **To assign a workplace, navigate to the TWAdmin -> TWUser Admin section of the EHR**
- **Search for the user that needs to have the Workplace assigned**

Assigning Workplaces

TW Admin ▼ Hide VTB

TWUser Admin User Admin

Charge Admin
Chart Admin
Dictate Admin
Dictionaries
Document Admin
Group Admin
iHealth Queue
Note Admin
Concept Mapping
Org Setup
PHB Comp Admin
PHB Sec Admin
Preferences
Printing
Provider Admin
Pt List Admin
Results Admin
Report Admin
Security Admin
Task Admin
TWUser Admin

Select User ▼

Search: Last Name ▼ Starting With ▼

User Type ▼	Last Name ▼
User	Allscripts

User Details

User Name: jallscripts

Default Site: TouchWorks Clinic


Employee#:

Credentials:

Assigning Workplaces

- **Scroll to the Workplaces section of the user setup screen**
 - **Highlight the appropriate system and click “Edit Workspaces”**
 - **Click on the ellipsis and search for the newly created WP.**
 - **Click on the WP to close the search box, then click Save**

Assigning Workplaces

 **Workplaces**

SystemID	SystemName	MenuKey
PHYCHAN	Phychan	
test	test	
TestMed	TestMed Default	
TM	TestMed System	
TouchWorks	TouchWorks Default	

Edit Workspaces

Assigning Workplaces

System WorkPlace Menus -- Webpage Dialog

System WorkPlace Menus Save Help Cancel

System ID	System Name	WorkPlace Menu
PHYCHAN	Phychan	<input type="text"/>
TouchWorks	TouchWorks TEST 2	<input type="text"/>

The screenshot shows a web-based dialog box titled "System WorkPlace Menus -- Webpage Dialog". It contains a table with two columns: "System ID" and "System Name". The first row is "PHYCHAN" and "Phychan". The second row is "TouchWorks" and "TouchWorks TEST 2". To the right of each row is a text input field for the "WorkPlace Menu". A red rectangle highlights the input field for the "TouchWorks" row, which contains three dots "...".

Further Information

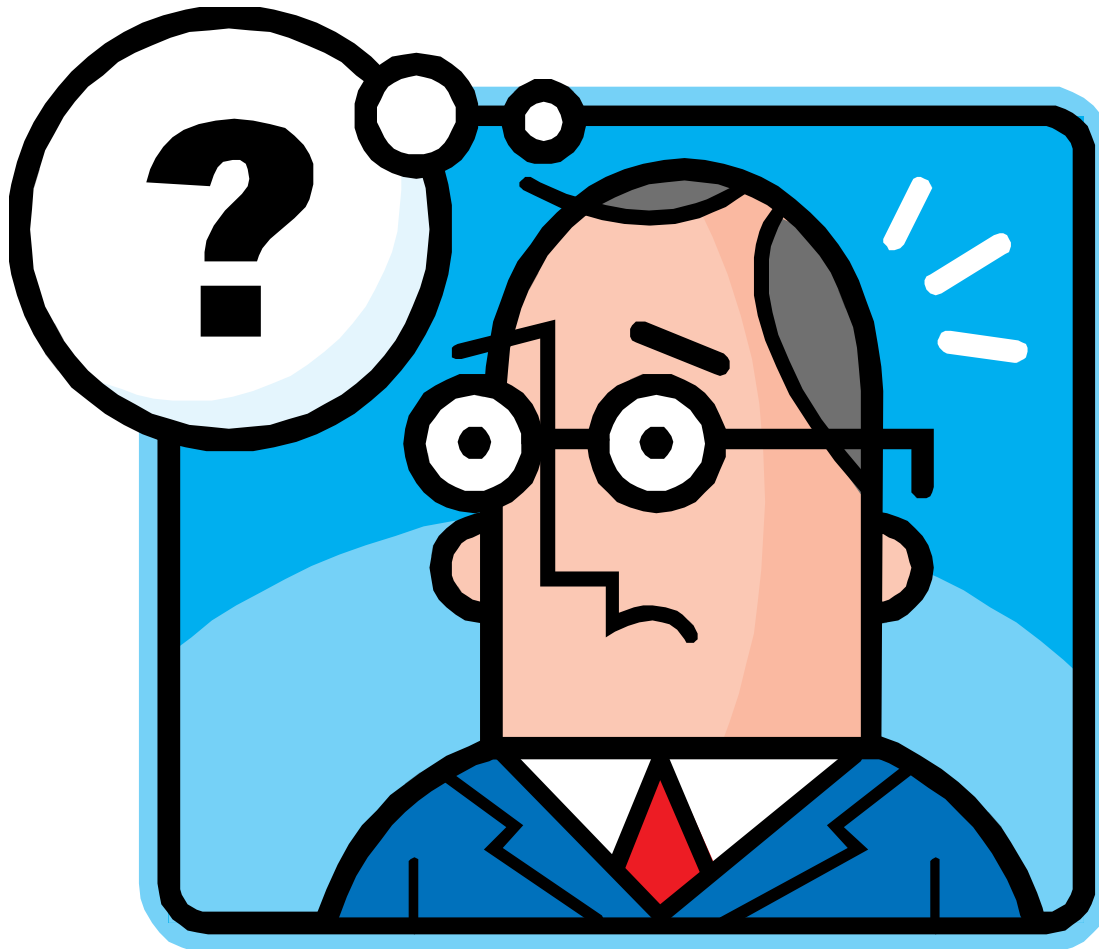
Galen Wiki:

- <http://wiki.galenhealthcare.com/Category:Webcasts>

Additional Questions? Feel free to email us at:

- education@galenhealthcare.com

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