From the Office of Health Informatics

Quick Reference Guide (QRG) Manage the GetWell Loop Dashboard

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This Quick Reference Guide (QRG) reviews the GetWell Loop Dashboard.

GetWell Loop allows care teams to engage with patients across their care journey through automated virtual check-ins. By sending the right information at the right time, patients who need help can be immediately identified.

Patients will use the GetWell Loop from the patient portal. After a patient completes their GetWell activation and checklist items, the Care Team can begin using the GetWell Dashboard to monitor and manage the patient's care.

Manage the GetWell Dashboard

This section describes important features of the GetWell Dashboard.

➢ **Access the GetWell Dashboard**

- From the Home screen of PowerChart, click the **GetWell Dashboard** button in the toolbar. GetWell Dashboard

➢ **Patient Status**

- In the Patient Status section, patients are grouped in the Red, Yellow, Pre-Op, or Monitored sections for easy identification by the level of attention they require. Red and Yellow statuses are determined by the patient's responses to questions. By clicking a status, the Needs Attention list on the right can be filtered.

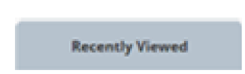
➢ **Monitor a Patient**

- Monitoring a patient allows the user to receive notifications based on the patient's status over time.
- From the At a Glance tab:
  - Click a patient in the patient list.
  - Click **Monitor.** MONITOR
    - The Monitor Patient pop-up opens.
  - Set the appropriate re-alert time and Message to Patient.
  - Click **Monitor.**

➢ **Patient Engagement**

- The Patient Engagement section shows a list of all patients in the Practice with assigned loops, grouped by their level of engagement. Click any of the Engagement Statuses on the left to sort the list.

- **Patient Overview**
  - The patient overview includes important information regarding a patient's loop. This includes the alert level, loop activity status, procedure, provider, loop enroll date, and the trigger time and reason for the alert. To access this screen, click the patient's name in the either the Patient Status or Patient Engagement list in the At a Glance tab.
- **Patient Overview – Messages**
  - To effectively use the Messages section of the Patient Overview, consider the following:
    - The Messages section contains all messages that have been sent to the patient or by the patient via their GetWell Loop. Images and attachments can be sent by either the care team or the patient. This is typically done when a patient wants to send a picture of a worsening condition, or a provider wants to send a patient educational material.
    - To send a message, click the text field, type the message, then click **Send**.
    - To send an attachment or access Canned Messages, click the **Ellipsis**. Then click the appropriate option. 
    - If an alert or message sent by a patient from the GetWell Loop is urgent, use current state workflow for contacting providers, such as face-to-face or telephone communication.
- **Patient Overview – View Patient Activity**
  - This section contains the patient's check-ins, which include the patient's responses to periodic questions. The section also includes the Patient Checklist, Patient Resources, and Outcome Surveys.
- **Patient Overview – Edit**
  - This section allows for viewing and editing of the Patient's Information, Loop Information, and Medical Information.
- **Patient Overview – History**
  - The History section displays all interactions within the patient's GetWell Loop.
- **Action Items**
  - To access the Action Items list, click the **Action Items** dropdown arrow from various places within the GetWell Loop Dashboard. Currently, the Handoff and Bill Time items are not being used; however, the Internal Note action allows users to write a note for future reference. 

- **Recently Viewed Tab**
  - To see patients that have recently been viewed, click the **Recently Viewed** tab. Once viewing the tab, click any of the patients in the list to quickly re-open their Overview. 

- **My Patients Tab**
  - This list includes patients that have been viewed recently and patients that have been favorited. To favorite a patient, click the **Star** icon by their profile image in their Overview.
- **Filter Tab**
  - The Filter tab allows for filtering of patients based on one or more criteria. When applying a filter, the patient list at the bottom of the screen will be adjusted to only include patients that satisfy the filter criteria.
- **Canned Messages**
  - Canned Messages are pre-written messages that can quickly be sent to the patient. To use this feature effectively, consider the following:
    - To access the Canned Messages screen, click the profile dropdown arrow at the top right of the dashboard; then click **Canned messages**.
    - Although personal canned messages can be created, many have been created already to address common situations.
    - Saved messages appear in the left column. These favorites can be filtered by clicking the relevant option above the list.
    - To add a new favorite, click a message's **Star** icon, or drag and drop it into the favorite's column.
    - To create a new canned message, click **+Add New**; then create the message in the subsequent pop up. Finally, click **Save**. 

    - Edit any message by clicking its **Edit** icon.