
This Quick Reference Guide (QRG) reviews how to use the Clinical Review MPage

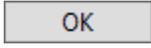
Use the Clinical Review MPage

Navigate to the Patient's Chart

➤ **From the Worklist with your patient list in view:**

STEP 1: Click the patient's name in the Patient Column.

- The assign a Relationship window displays.

STEP 2: Select the appropriate relationship; then click .

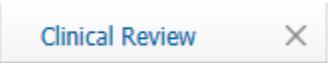
- The patient's chart displays, open to the Clinical Review tab.

Navigate the Clinical Review MPage

STEP 1: Click the  tab.

- The UM Summary tab displays.

NOTE: Here you can review the patient's individual Care Management information. The This Visit and Cross Visit providers are listed within the Care Team component.

STEP 2: Click the  tab.

- The Clinical Review tab displays.

STEP 3: Review the component information in view; then scroll down.

STEP 4: Click the **Insurance Information** drop-down arrow; then use the menu to navigate to other areas such as PM Conversation for review or documentation.

STEP 5: Click the **Insurance Information**  expansion arrow.

NOTE: Within some components, information can be added using free text.

STEP 6: Hover over the **Auth Comments** field.

- A blue dotted field displays.

STEP 7: Click the **Auth Comments** field.

- The Edit Comment window displays.

STEP 8: Enter the comment in the **Edit Comment** field; then click .

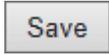
NOTE: Comments entered here will display in PM Conversation; comments entered in PM Conversation will pull into the Insurance Information component.

STEP 9: Click the **Vital Signs** drop-down arrow (next to the component header) to navigate to specific details pertaining to that particular component.

NOTE: This is true for any component header with a drop-down arrow.

STEP 10: Click the **Care Management Notes**  Plus icon.

- The Compose New Note window displays.

NOTE: Document the Type field; then enter any additional details and click .

STEP 11: Click the  **Add MPage** icon to add an additional MPage view.

- A New View tab displays.

STEP 12: Select the view you wish to add to the MPage.

STEP 13: Click the  icon for a view to remove a view from the MPage.

STEP 14: Click the  **Orders for Signature** icon to view and sign orders for the patient.

STEP 15: Click  **No Severity** (IPass) to view basic information entered by providers.

- A window displays the provider information.

STEP 16: Click  **No Severity** (IPass) once more to close the window.

STEP 17: Click the  **Customization Menu** drop-down arrow to set up your view of the components list.

STEP 18: Click the Components  Right Arrow icon.

- The components list displays.

NOTE: Components that are currently visible display with a check mark. Click any component to remove the check mark and hide the component from view; however, it is recommended to keep all components displayed.

STEP 19: Click **Expand All** to expand all components at the same time.

STEP 20: Click **Collapse All** to collapse all components at the same time.

STEP 21: Click **Drag and Drop** to rearrange the component list according to your preference.

STEP 22: Click the appropriate component header you wish to move; then drag it to the position you want.

STEP 23: Click **Drag and Drop** once more to deselect it from the Customization Menu.