Personalising Expanse

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usable | workable | safe

Why personalise Expanse?

- Improve efficiency of use – reduce searching and clicks
- See what you want to see more easily on the chart
- Document more quickly and easily

## What can I personalise in Expanse?

- Physician documentation (PDOC) templates and document sections favourites
- Quick text – personalised sections of editable text e.g. routine post-operative instructions
- Formatted data – insert specific data
- Problem favourites
- Graph favourites
- Flowsheets
- Ordering – medications, tests & requests
- .

Physician Documentation (PDOC) favourites

- Favourite your commonly used PDOC templates by clicking the star icon beside the PDOC name.
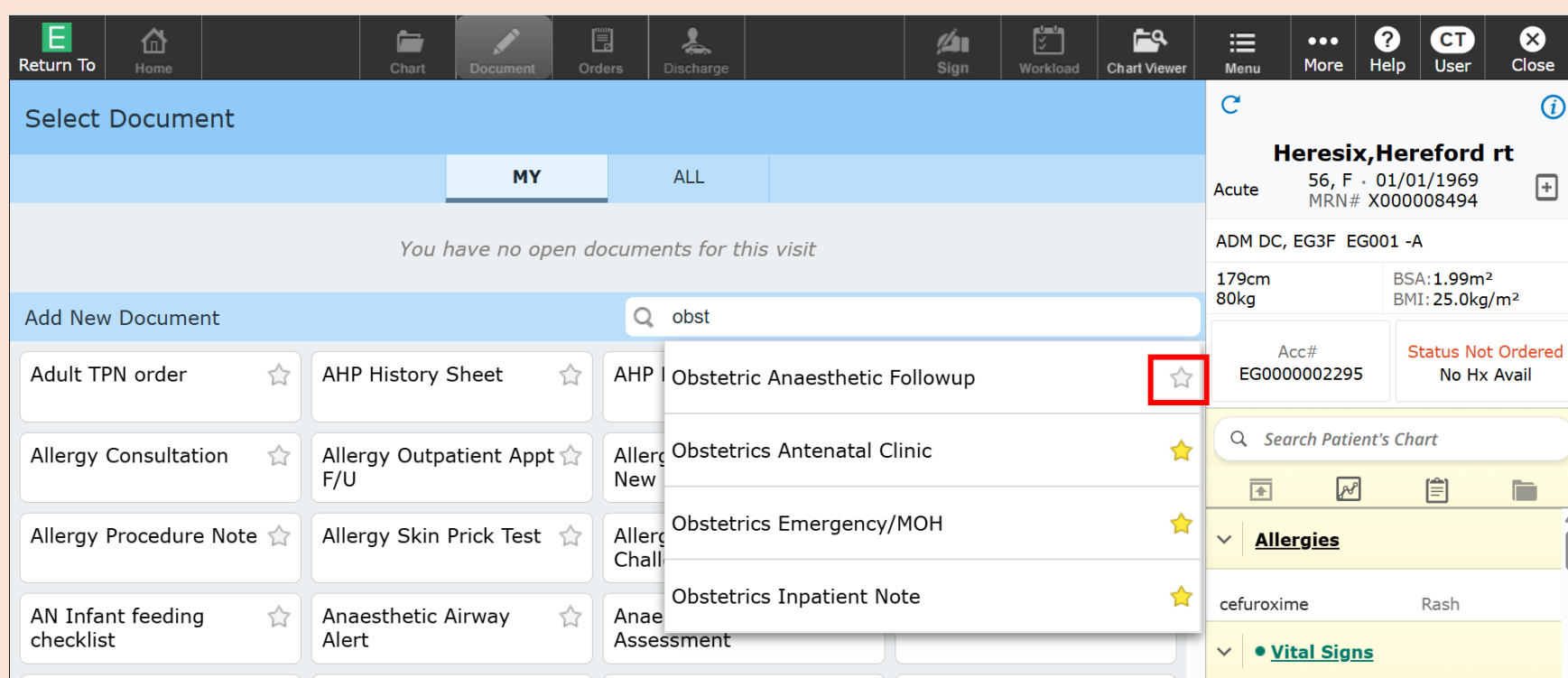

- Once selected, favourites appear on the document selection screen, eliminating the need to scroll and allowing you to select them with a single click.

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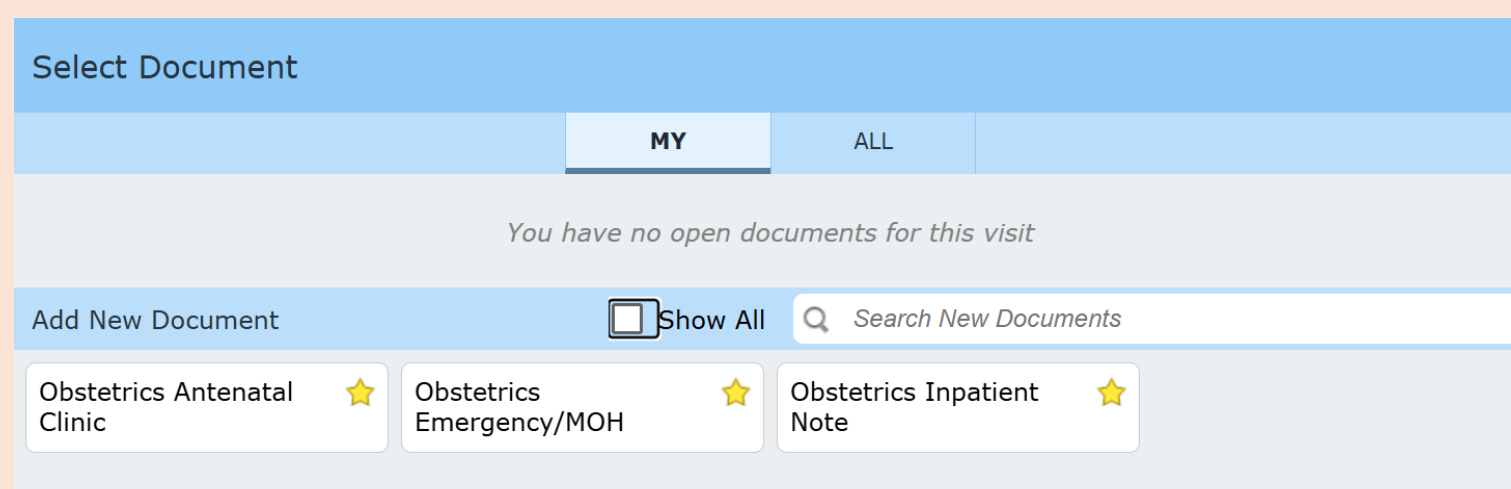
Document section favourites

- Document sections can be favourited in a similar manner. Open any PDOC and click on the 'Add content' option to open the 'Add section' overlay.
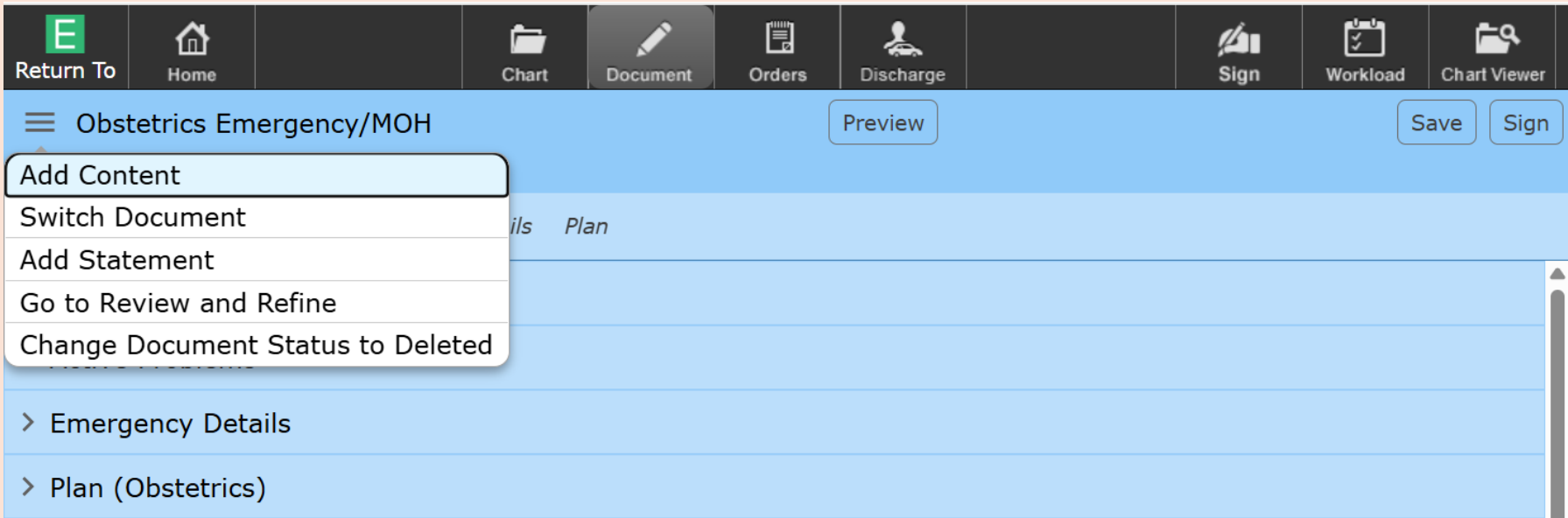
- Search using the type-ahead search box, or scroll the list, and click the star icon next to the document section name to favourite. Click elsewhere on the overlay to add to your favourites list, or onto the document section name to select to be added to the document.
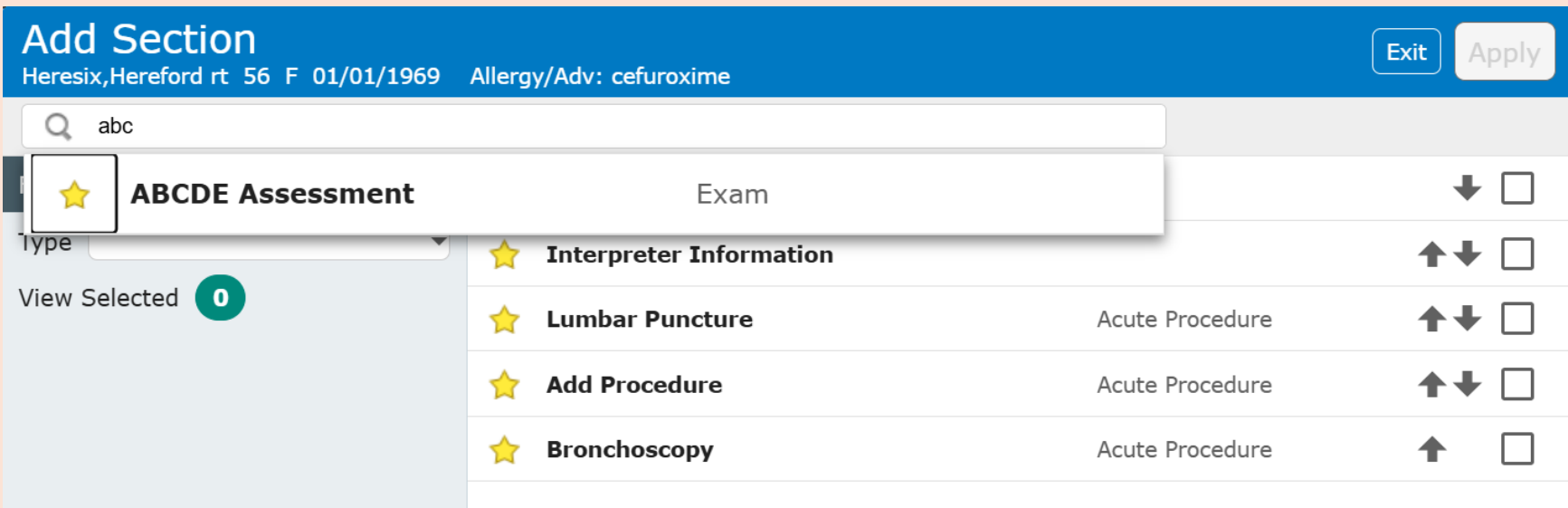
- The selected document section will now appear on your favourites list. The ticked checkbox shows that it will be added to the document – this can be deselected.
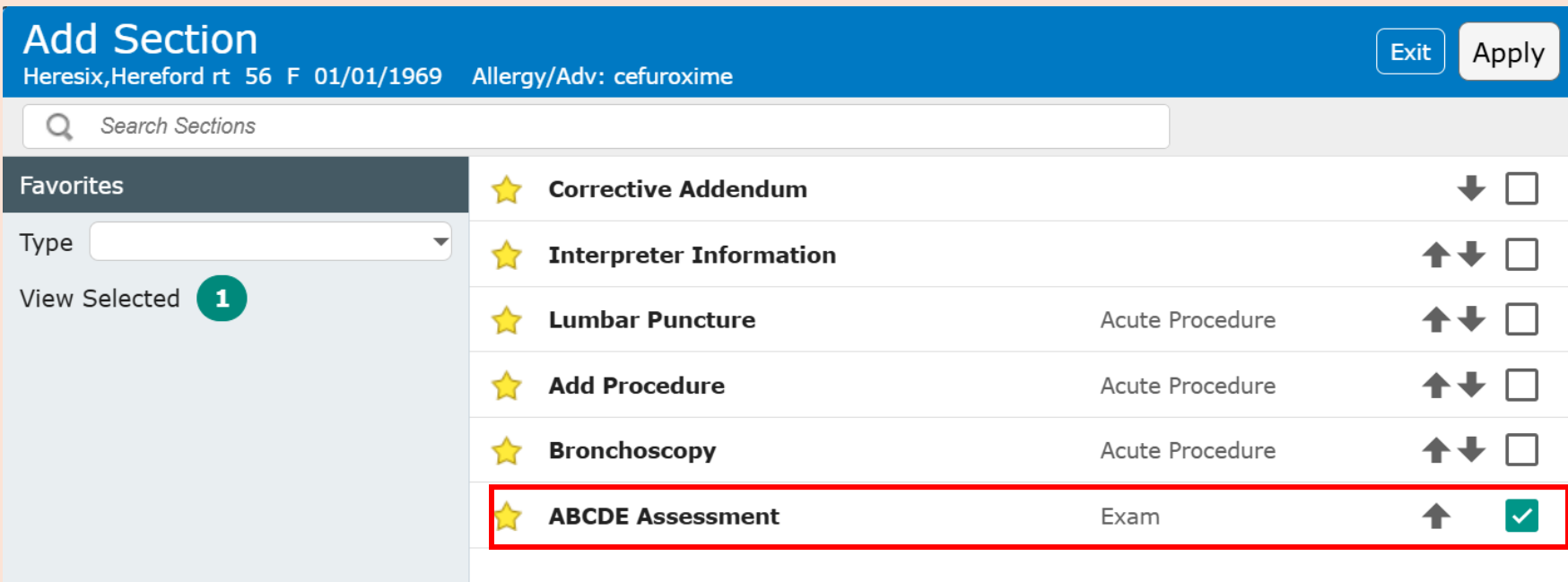
- Once a section is added, use the up and down arrows to move the item up or down in the list depending on where you would like it displayed. By deselecting the star icon you can remove the item from the list. *Note* : The item can be added again later.

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Problems (Problem List) favourites

- Access the Problems & History List overlay from:
  - *Summary* tab – PFSH widget: click on 'Medical History' or 'Surgical History';
  - *History & Problems* tab – click on 'Edit';
  - *Reference bar* - Active Problems widget: click on 'Active problems'';
  - *Via a PDOC* – 'Active problems' section: click on 'Add problem'; or, 'Past Medical and Surgical Hx' section: click on 'Medical history' or 'Surgical history'.

- Search using the type-ahead search box. A maximum of twenty options will be displayed but as more detail is added, the search terms available will refine e.g.

vs.

- You can also search by entering the IMO/SNOMED directly into the search box.

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Problems (Problem List) favourites

- To favourite a problem, click on the star icon beside the entry.

- To access your list of Problem favourites, click on the yellow star beside the search box; if you have more than 20 favourites, there may be a short delay in load time.

Graph favourites

- It is possible to favourite specific graphable data that you monitor frequently. These favourite graph items are then immediately viewable from the graphing screen for any patient you review.
- Select the data value you wish to favourite from the Diagnostics tab or Flowsheets tab e.g. haemoglobin level, NEWS2 score and right-click on the numerical result.

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Graph favourites

- From the menu that opens, click on 'Graph Favourites'. This adds the item to the Graph Favourites menu and closes the menu. You will now be able to graph this result for this patient during this session.

- On the Reference bar, select the Graph button and view your graph favourites that will now be automatically selected for each patient that you view. To view other values for a patient, add these to the Graph menu – if not favourited, this selection will not carry over to the next chart you view.

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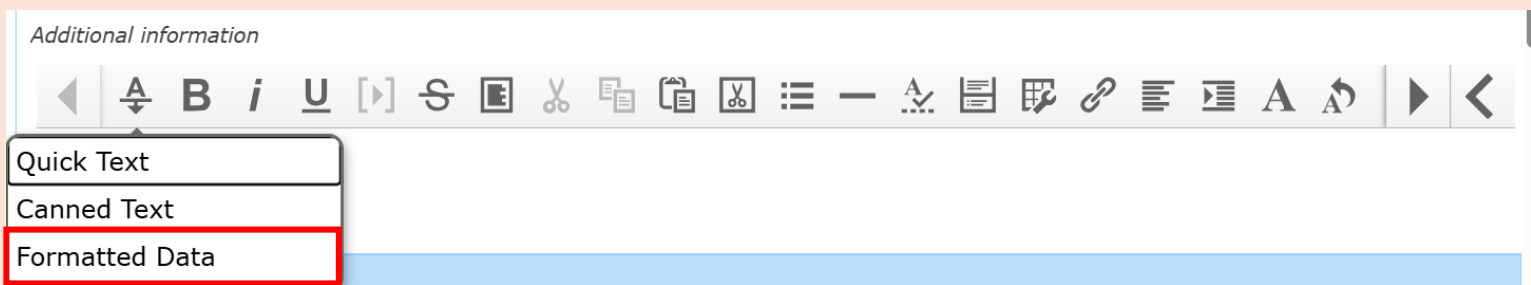
Formatted Data favourites

- Formatted Data favourites can be created by accessing the Formatted Data overlay within a Meditor box (free text entry box) from within a PDOC.

- Selecting the Formatted Data option from the 'A' icon. From the Formatted Data overlay, start typing to search for a specific Formatted Data value e.g. 'micro' and mark it as a favourite by selecting the star icon. The favourited items are then available as a blue box when the lookup is launched.
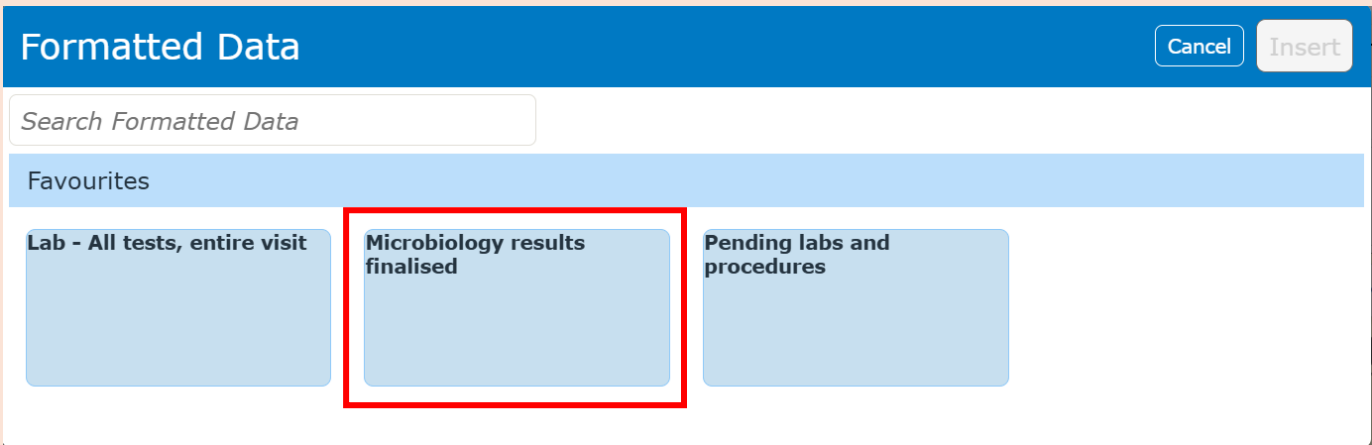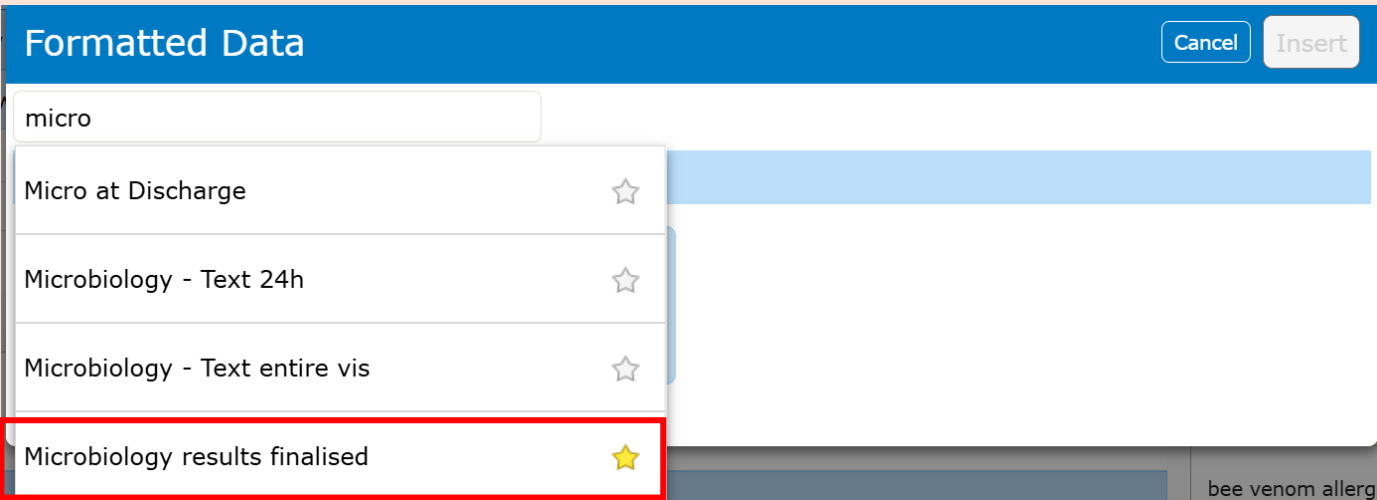
- Click on the desired favourite and the formatted data is inserted into the Meditor box, and can be edited or annotated as desired.

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Quick Text

- Quick Text is personalized text that a user can pull into a Meditor (free text entry) box in a PDOC. Quick Text allows custo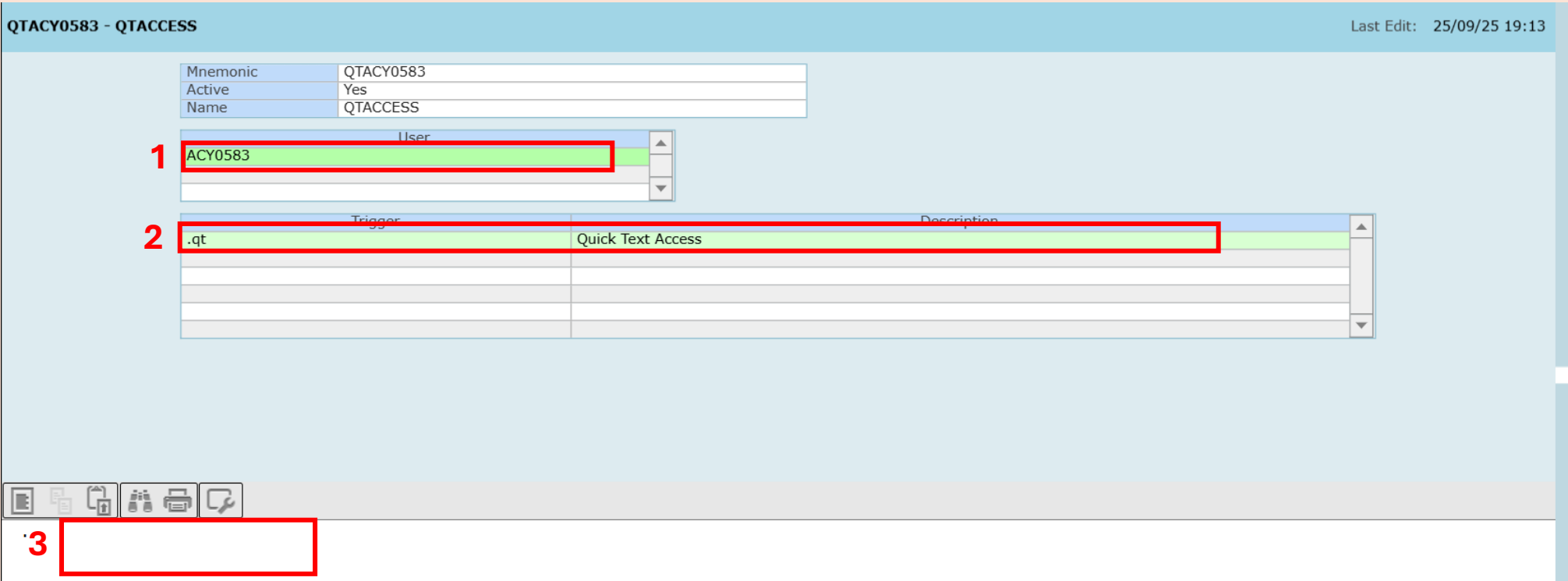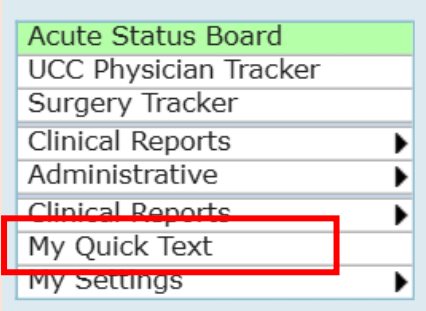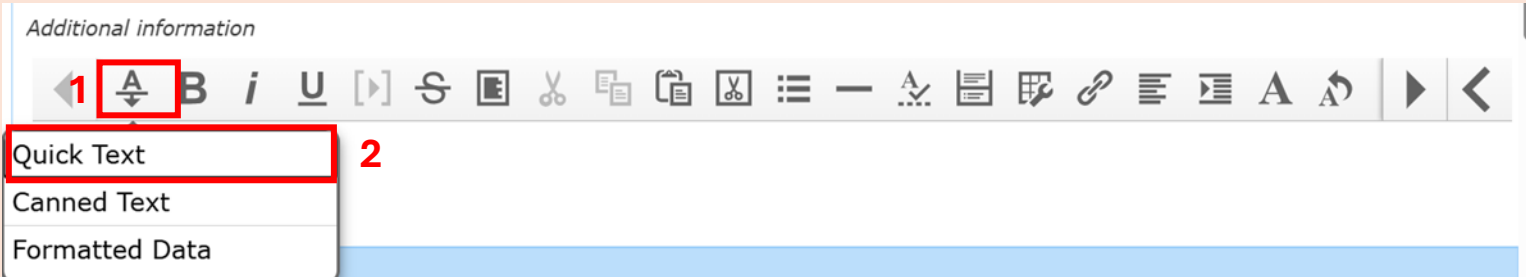mised documentation text to be entered quickly (e.g. routine post-operative instructions) and reduces documentation time.
- Quick text is editable once inserted into a Meditor box.
- Use the 'My Quick Text' function to add new triggers or edit your Quick Text, via the Quick Text dictionary.

Acute Status Board	
UCC Physician Tracker	
Surgery Tracker	
Clinical Reports	▶
Administrative	▶
Clinical Reports	▶
My Quick Text	
My Settings	▶

QTACY0583 - QTACCESS   Last Edit: 25/09/25 19:13

Mnemonic   QTACY0583
Active   Yes
Name   QTACCESS

User
1 ACY0583

Trigger   **Description**
2 .qt   Quick Text Access

'3

- The Quick Text Dictionary houses all Quick Text entries where users are then attached to an individual entry **1**. Each entry consists of triggers **2**, which are individual text commands that pull the text **3** into the document, and the text content. Each entry must have a trigger which starts with '.' a full stop (period) e.g. '.qtaccess'.
- To add a new entry, enter your new Trigger and Description in field **2**, then enter the full body of the text in field **3**. You can copy and paste into the text entry field from another source (e.g. an operating note template), but it is recommended to past first into Notepad and then into Expanse to avoid formatting issues.

- You can also create new Quick Text entries while within a PDOC, via the Quick Text overlay. In a Meditor box, select the A icon **1** to display the drop-down for the Quick Text overlay **2**.

*Document > Meditor Toolbar > 'A' icon*

Additional information

1 [toolbar icons]

Quick Text	**2**
Canned Text	
Formatted Data	

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Quick Text (continued)

- In Edit mode, you can create a new trigger via the 'Create New Trigger' **1** button. Add the trigger text **2** in the space below and enter the description and full body of text **3** to the right. Select 'Save' **4** to retain edits to the entry and 'Insert' to pull it into the document.
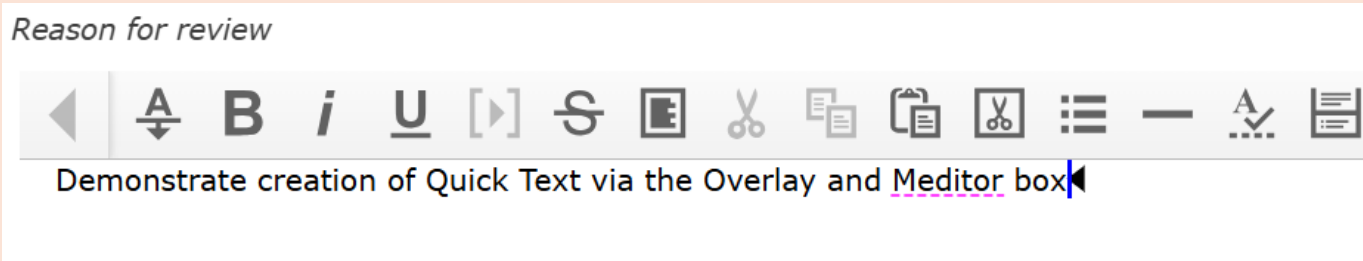- Edit the description and text of an existing entry by highlighting the name on the left.

  Document > Meditor Toolbar > 'A' icon> Quick Text
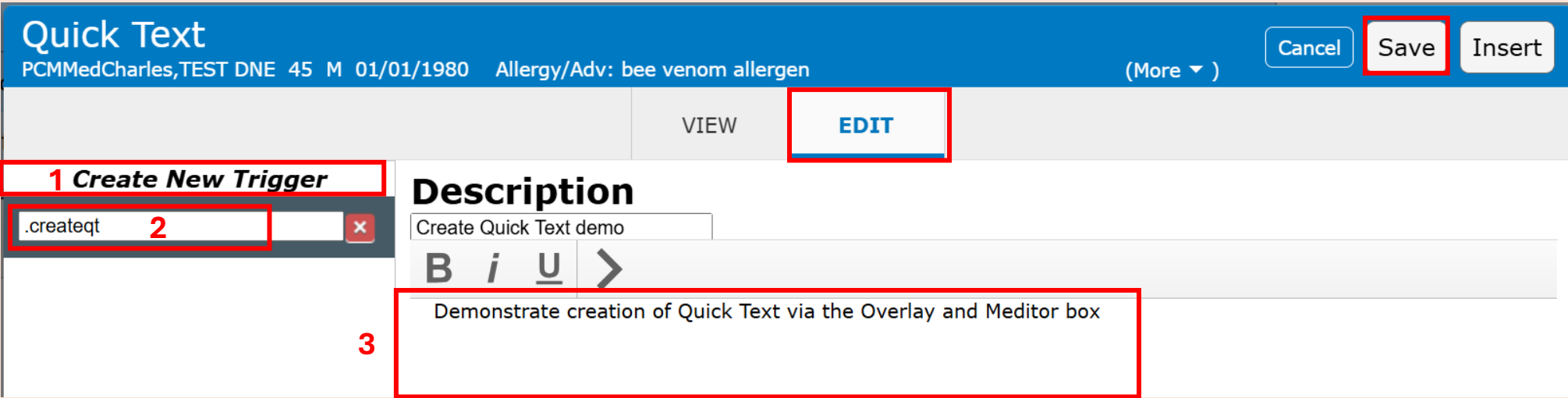
- In View mode, personalised trigger entries **1** display on the left, while their associated descriptions **2** display to the right. Select 'Insert' **3** to pull the body of text into the Meditor box.
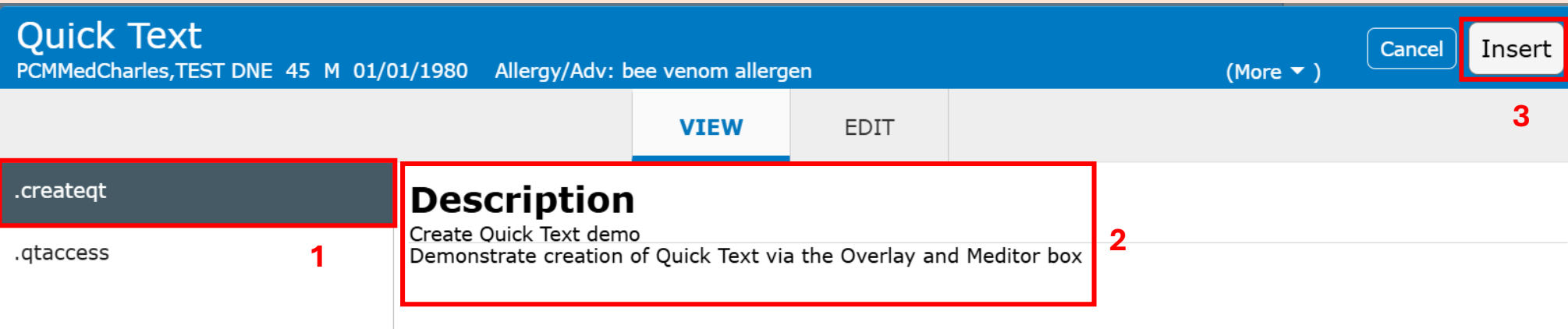
Inserted Quick Text in Meditor box:

- Quick text can be inserted directly by typing the trigger into the Meditor box, followed by a SPACE

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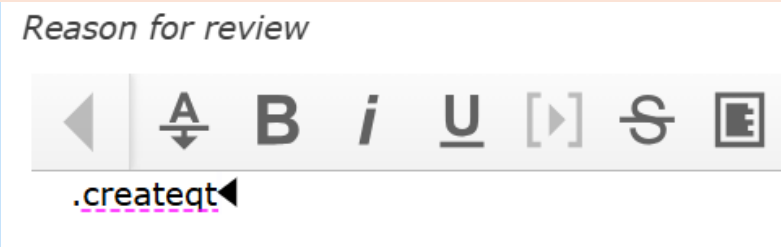
Order favourites

- Orders for medications, investigations, or nursing actions can be favourited in a similar manner to other items, streamlining the entry of frequently used items. Selecting the star icon next to an order string or name makes that order/medication available under the Ordering Favourites menu. By deselecting the star icon you can remove the item from the list. *Note* : The item can be added again later.
- As shown below, you can define a favourite at the name or string level.

Orders > Identify Order Set > Star icon

Orders > Identify Order String > Star icon

Orders > Favourites

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Flowsheet favourites

- In the patient's chart, flowsheets are available. These contain patient data combined from multiple sources within clinical documentation into a single time-oriented flowsheet. In the Flowsheet's tab, you can search for flowsheets by selecting the Viewing field. Selecting the star icon saves the flowsheet as a favourite. By deselecting the star icon you can remove the item from the list. *Note* : The item can be added again later.
- Favourited flowsheets always display at the top of the dropdown list, for ease of use.

Clinical > Acute Status Board or UCC Physician Tracker > Chart > Flowsheets > Viewing field

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'My Flowsheet'

- Viewing the Flowsheets Tab in the chart, patient data is combined into a single time-oriented flowsheet. The clinical panels within the Flowsheets tab house different groups of information. Users can also create a personalized flowsheet called 'My Flowsheet' to view specific pieces of EMR data according to their personal preference.
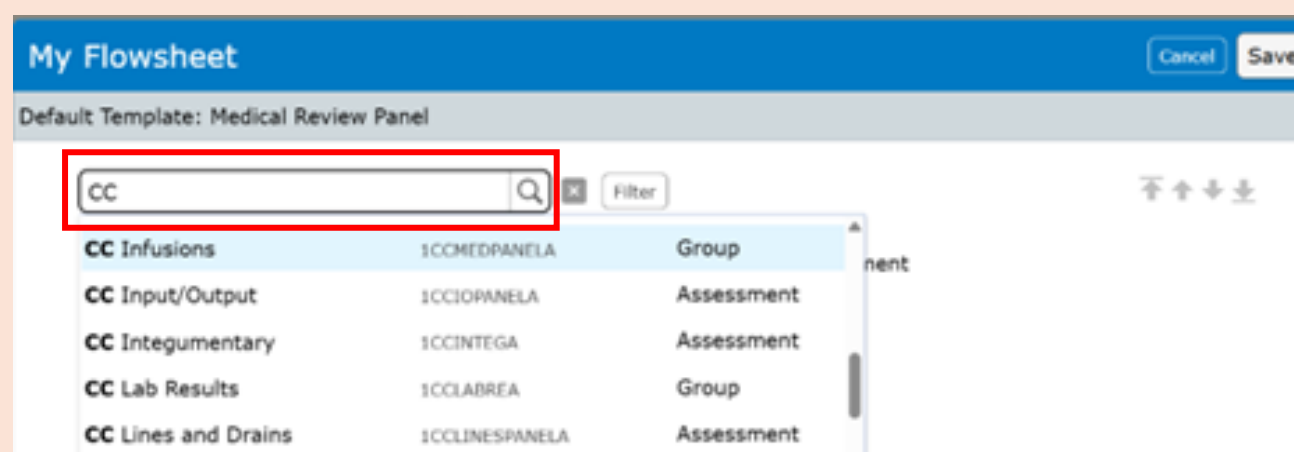
1. Open My Flowsheet

- Once you select the Viewing: drop-down arrow **1**, My Flowsheet is found at the top of the drop-down list in the Flowsheets Tab of the chart. Select My Flowsheet **2** to see the items already added to your personalized flowsheet. The default view is the Medical Review panel.
  Clinical Home screen > Chart > Flowsheets Tab > Viewing: drop-down list
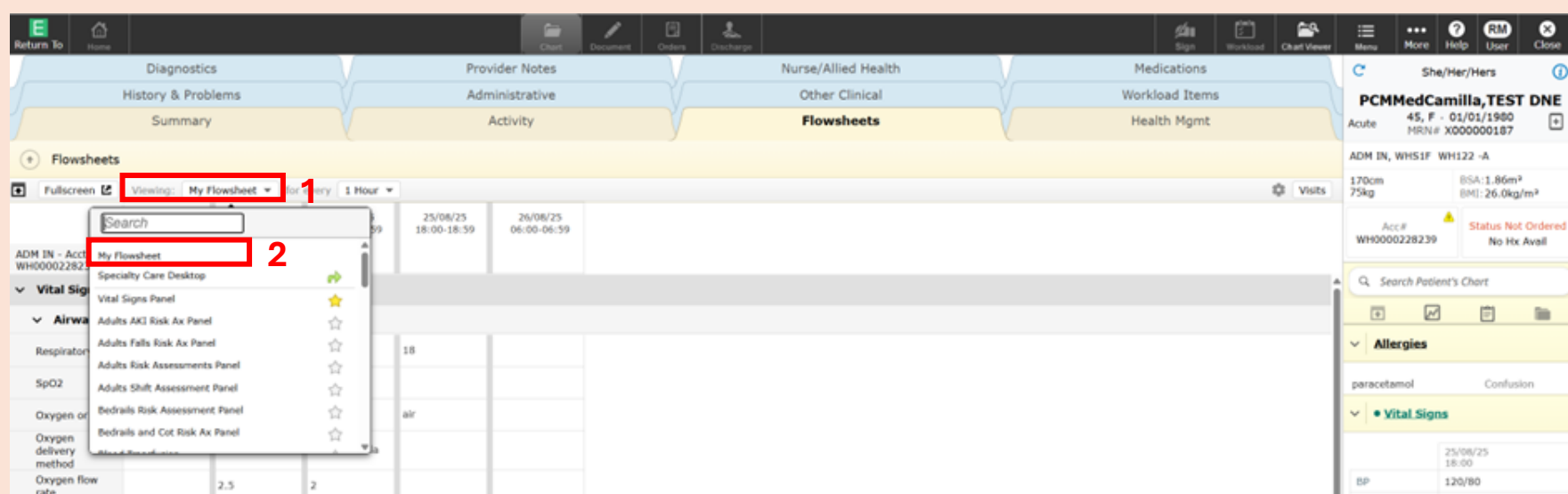

2. My Flowsheet overlay – add items

- The My Flowsheet overlay now displays. Here you can add an assessment or clinical panel group entry using the type-ahead Search field at the top of the overlay.

- **Tip:** CC Lab Results will allow you to view your patient's blood results from within My Flowsheet.
- You can also review the list of available assessments and clinical panels and select from the list.
- To add a clinical panel group/flowsheet, click on 'Filter' **1** and deselect 'Assessments' **2** – this reduces the displayed items and makes it easier to review. Click on the magnifying glass **3** to display the list.
- To add an assessment (one of the components of a panel) on its own, click on 'Filter' **1** and select 'Assessments' **2** only. Click on the magnifying glass **3** to display the list.
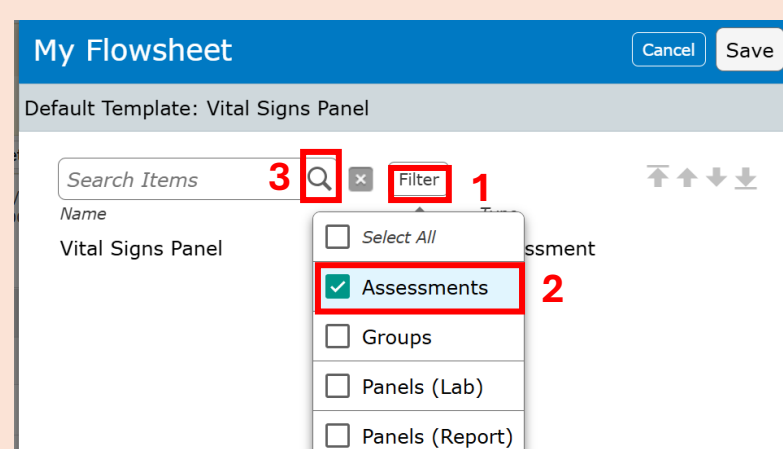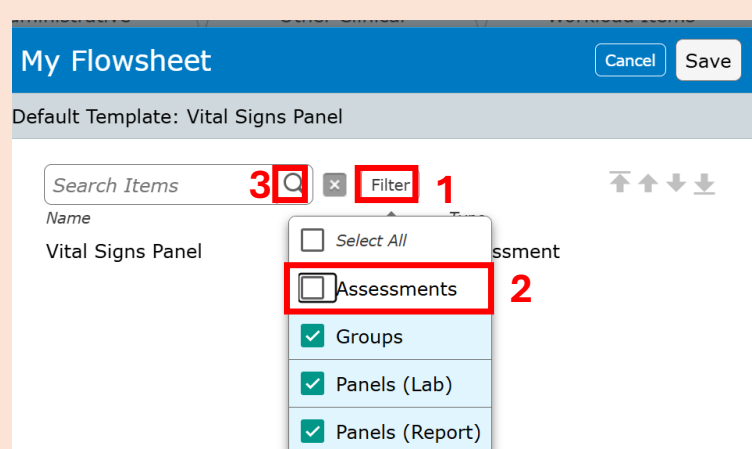
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3. Optimising your My Flowsheet layout

- Once an item is added, move the item up or down in the list using the up and down arrows **1**, depending on where you would like it displayed in the chart. Using the **x** on the right side of the item **2**, remove the item from the list. *Note* : The item can be added again later.
- Once you have finished adding or removing items, save your changes. Select the Save button **3**.

Order optimised:
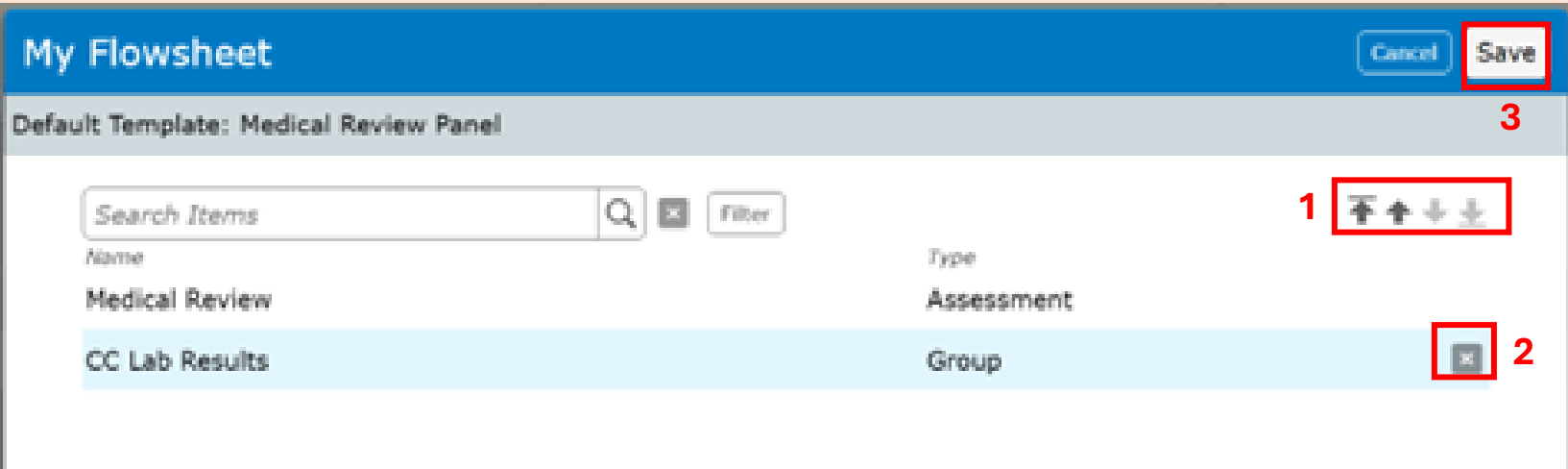
My Flowsheet displays with the sections in desired order: