Patient Chart Sidebar Navigation

Last modified on 09/27/2024 6:54 pm EDT

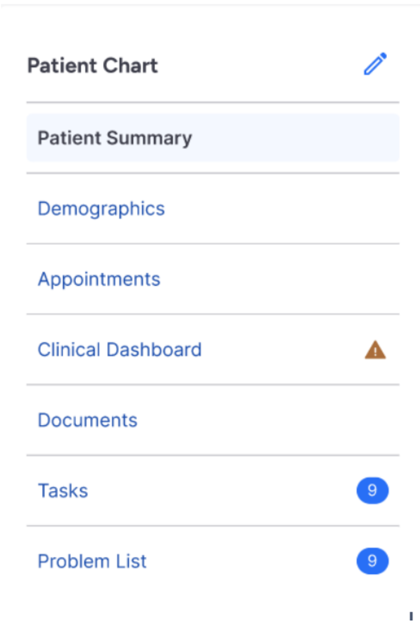
The primary purpose of the patient chart is to facilitate informed decision-making by healthcare providers, ensuring access to vital information during patient visits.

The patient sidebar navigation has been updated to allow users to easily display or hide various sections of the patient chart, significantly improving the efficiency of their daily workflow. By customizing the visibility of chart components, users can quickly access the information most relevant to their tasks, enabling a more streamlined experience.

This article will cover

- **Overview of the patient chart sections**
- **Permission and patient chart settings**
- **Customizing the patient chart sidebar**

Updated patient chart sidebar



Overview of Patient Chart Sections

- **Patient Chart**: display, hide, and reorder various sections of the patient chart.
- **Patient Summary**: a snapshot of the patient's medication list, problem list, allergy list, and locked clinical notes.

- **Demographics:** Basic patient information, including name, age, contact details, and insurance data.
- **Appointments:** Schedule and manage patient visits, including past and upcoming appointments.
- **Clinical Dashboard:** A visual overview of the patient's health status and key metrics at a glance.
- **Documents:** Access to important patient documents, such as consent forms and medical records.
- **Eligibility:** Verification of patient insurance coverage and eligibility for services.
- **Tasks:** List of actionable items and reminders for healthcare providers related to patient care.
- **Problem List:** A summary of active medical issues and diagnoses for the patient.
- **Medication List:** Comprehensive inventory of current and past medications prescribed to the patient.
- **Send eRx:** Functionality to electronically send prescriptions to pharmacies.
- **Allergy List:** Record of patient allergies, including reactions and severity.
- **Drug Interactions:** Information on potential interactions between prescribed medications.
- **CQMs (Clinical Quality Measures):** Metrics used to assess the quality of care provided to patients.
- **Intake Data:** Information collected during patient intake, including medical history and lifestyle factors.
- **Lab Orders:** Details of laboratory tests ordered for the patient, along with results.
- **Immunizations:** Record of vaccinations administered to the patient.
- **Patient Cost Estimator:** Tool for estimating out-of-pocket costs for services and treatments.
- **Growth Charts:** Graphical representations of a patient's growth metrics over time.
- **OnPatient Access:** Patient portal access for patients to view their health information and communicate with providers.
- **Education Resources:** Materials and information to educate patients about their health and treatments.
- **Communication:** Tools and methods for facilitating communication between patients and healthcare providers.
- **Family History:** Documentation of medical conditions and history of health issues within the patient’s family.
- **Imaging Orders:** Records of imaging tests (e.g., X-rays, MRIs) requested for the patient.
- **Implantable Devices:** Information regarding any devices implanted in the patient, such as pacemakers or joint replacements.

Permission and Patient Chart Settings

Permission and Patient Chart Settings

- When adjusting permissions and chart settings, the system follows a hierarchical order notated below.
    - The system initially looks for any user-level setting to display. If there is no user setting...
    - The system will then look for any role-level settings to display. If there is no role-level setting...
    - The system will then look for any practice-level setting. If there is no practice level setting...
    - The system will display the DrChrono default settings.

Please note, that if any users within your practice are assigned to a “custom” role, this may impact your ability to leverage this new functionality. See below for more information.

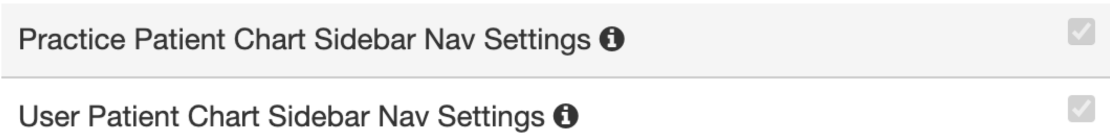
- When any permissions are adjusted at the user level, the user's role will automatically switch to "custom" upon saving (Account > Staff Permissions > Providers or Staff tab). To revert to a standard public role, the user must select an option from the drop-down menu for role types and then save the changes.   It is best practice and recommended to create a new role through the Roles tab from the Permissions Administration screen to customize permissions and assign staff members (as a group) to a specific role, to prevent possible workflow disruptions.

Your browser does not support HTML5 video.

Permission Settings

To access the updated patient chart sidebar navigation view, users can enable permission settings based on the administrative or user level. To adjust permissions navigate to Account > Staff Permissions.

- Practice Patient Chart Sidebar Navigation Settings - allow the user to customize the patient chart header settings for the practice.
- User Patient Chart Sidebar Navigation Settings - allow the user to customize the patient chart header settings for the user.



Customizing the Patient Chart Sidebar

After enabling the permission settings, users can view and adjust the patient header and the patient chart side navigation settings. There are two (2) ways to customize the patient chart side navigation, from patient chart settings or the patient chart.

1. Patient Chart Settings

To edit navigate to Account Settings > Practice Settings > Patient Chart Settings.

Patient Chart Side Navigation

Eligibility Tab Configuration

Please note that the 'Eligibility ' tab in the patient chart settings is only available to customers with the Billing Module and Real-Time-Eligibility enabled. If your practice meets these requirements, you can configure the eligibility screen for both practice-level and role-level settings. If the tab does not appear in the patient chart after being enabled, please contact support.

Default Settings

System defaults - view which settings are enabled, hidden, and disabled

Practice defaults - view and edit which sections appear on the chart sidebar for the practice.

User Role Settings

Add or remove which sections appear on the chart sidebar for specific staff roles.

Editing Practice Default Settings

1. Click edit under the action column to navigate to the patient information screen
2. Select up to 8 patient information to display in the patient header.
3. Press the (+) or (−) to add and remove menu items.
4. Drag and drop to reorder the menu list.
5. Cancel, Restore System Default, or Save Settings.

Editing User Roles Settings

1. .Click + Role Settings to navigate to the patient information screen.
2. Select a role to add settings.
3. Select up to 8 patient information to display in the patient header.
4. Press the (+) or (−) to add and remove menu items.
5. Drag and drop to reorder the menu list.
6. Cancel, Restore System Default, or Save Settings.

Other Settings

- Display Patient Photo - enable to display patient photo in the patient header.
- Display Chart ID - enable to display chart ID in the patient header.
- Display CDS Flags - enable to display CDS flags in the patient header.
- Collapsed Patient Header by Default - enable to display collapsed patient header by default

Once a user updates the chart settings, the selected sections will appear on the patient chart sidebar.

2. From the patient chart (sidebar)

To customize the user-level role from the patient chart ...

- Press the ( ) icon next to Patient Chart on the left sidebar to enter edit mode.
- Drag and drop to reorder the menu list.
- Click the ( ) icon to show or hide a section in the menu list.
- Click exit edit mode to return to the menu list,

Click play to view the patient chart settings demonstration video.

Your browser does not support HTML5 video.

Click the help center articles below to learn more.

Patient Header	Patient Chart Summary
How to Customize the Patient Chart Header	