

Customizing the Patient Chart Header

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The customizable patient header allows users to select which patient information is displayed, providing a quick overview of essential details for daily workflows. Adjustments can be made at both the user and practice levels.

This article will cover

- [Permission settings](#)
- [Customizing the patient header](#)

Permission 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.

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Permission Settings

To view the updated patient chart header, users can enable the permission at either the administrative or user level by going to Account > Staff Permissions.

- Practice Patient Chart Header Settings - allow the user to customize the patient chart header settings for the practice at the administrative level.
- User Patient Chart Header Settings - allow the user to customize the patient chart header settings at the user.

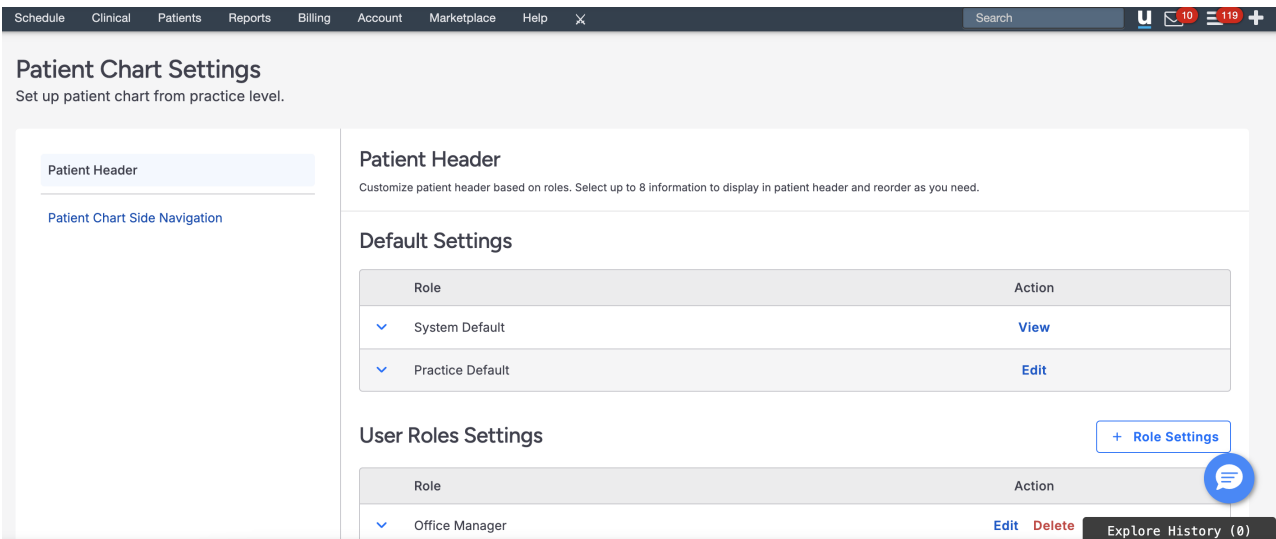
Practice Patient Chart Header Settings 	<input checked="" type="checkbox"/>
User Patient Chart Header Settings 	<input checked="" type="checkbox"/>

Customizing the Patient Header

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 header, from patient chart settings or the patient header.

1. Updating Practice Patient Chart Settings

Navigate to Account Settings > Patient Chart Settings.



Patient Chart Settings
Set up patient chart from practice level.

Patient Header
Customize patient header based on roles. Select up to 8 information to display in patient header and reorder as you need.

Default Settings

Role	Action
System Default	View
Practice Default	Edit

User Roles Settings [+ Role Settings](#)

Role	Action
Office Manager	Edit Delete

[Explore History \(0\)](#)

Patient Header Settings

Default Settings

System defaults - view what patient information appears in the patient header for the system default level.

Practice defaults - view and edit what patient information appears in the patient header at the practice level.

User Role Settings

Add or remove what patient information appears in the patient header at the user level.

Editing Practice Default Settings

Edit Role Settings



Patient Information

Select up to 10 patient information to display in the patient header.

All Information

:: Primary Ins	+
:: Secondary Ins	+
:: Patient Balance	+
:: Eligibility	+
:: Smoking Status	+
:: Language	+
:: Prev Appt	+
:: Provider	+
:: Address	+

Selected Information (Up to 10)

:: Email	-
:: OnPatient	-
:: Ethnicity	-
:: Date Added	-
:: Next Appt	-
:: Referred by	-
:: Race	-
:: Preferred Pharmacy	-
:: Phone	-



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Other Settings

Display Patient Photo

Enable to display patient photo in the patient header.




Cancel

Restore System Default

Save Settings

1. Click edit under the action column to navigate to the patient information screen
2. Select up to 10 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  to navigate to the patient information screen.
2. Select a role to add settings.
3. Select up to 10 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.

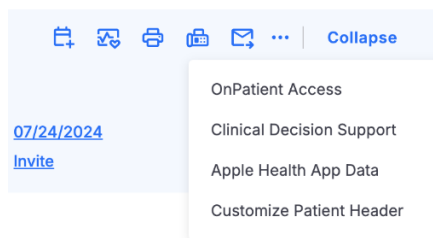
Other Settings

- 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

2. Updating User Patient Chart Header Settings

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

1. Navigate to the action items section drop-down > customize patient header to navigate to the patient information screen.



2. Select up to 10 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.

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

Press play to preview the demonstration videos.

[From Patient Chart Settings](#)

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[From Customize Patient Header in Chart](#)

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Related Help Center Articles

Patient Chart Sidebar Navigation	Patient Chart Summary
Patient Header	Patient Header Tutorial Video
