Customize the Patient Chart Header

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Select this link to watch a video with step-by-step instructions.

After you turn on the patient chart permissions, you can view and modify the patient information shown in the **Patient Chart Header** from within the patient chart or from **Patient Chart Settings**.

Customize from within the patient chart

You can customize what's shown on the Patient Header for the user from within the patient chart.

1. In the patient chart, on the right side of the **Patient Header**, select **More actions** ... to open the dropdown for additional actions and then select **Customize Patient Header**.



The **Customize Patient Header** side panel opens.

2. Select the plus icon + or minus icon to add or remove the information (up to 10) shown on the **Patient Header**.

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ther Settings				
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- 3. Drag and drop to reorder the menu list.
- 4. Select Save.

Other Settings

Do one of the following and then select **Save**.

- Display Patient Photo: Turn the toggle switch on to show the patient's photo in the Patient Header.
- Display Chart ID: Turn the toggle switch on to show the chart ID in the Patient Header.
- Display CDS Flags: Turn the toggle switch on to show the DSI flags in the Patient Header.
- **Collapsed Patient Header by Default:** Turn the toggle switch on to show the **Patient Header** collapsed (the demographics section is hidden) by default.

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isplay Chart ID able to display chart ID in the patient header. isplay CDS Flags able to display CDS flags in the patient header. ollapsed Patient Header by Default able to display collapsed patient header by default.			

Customize from Patient Chart Settings

You can customize what's shown in the Patient Header from Patient Chart Settings.

Select Account Settings > Patient Chart Settings.

Default settings

Patient Chart Settings Set up patient chart from practice level.								
Patient Header	Patient Header Customize patient header based on roles. Select up to 10 information to display in patient header and reorder as you need.							
Patient Chart Side Navigation	Default Settings							
	Role	Action						
	✓ System Default	View						
	Practice Default	Edit						
	User Roles Settings	+ Role Settings						
	Role	Action						
	 Provider 	Edit Delete						
	1–1 of 1 item							

System default

Select View to see which settings are turned on, hidden, and turned off.

Practice default

Select Edit to view and edit what's shown on the Patient Header for the practice.

User Roles Settings

Select **Edit** to view and edit what's shown in the **Patient Header** for specific roles. When you delete a user role's settings, it inherits the practice default settings. See Edit user role settings.

Edit practice default settings

- 1. In Patient Chart Settings, select Edit under the Action column to open the Edit Role Settings side panel.
- 2. Select the plus icon + or minus icon to add or remove menu items.
- 3. Drag and drop to reorder the menu list.
- 4. Select Save Settings.

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Add a user role setting

- 1. In Patient Chart Settings, select Role Settings to open the Add Role Settings side panel.
- 2. Click in the search bar and then select a role.
- 3. Select the plus icon + or the minus icon to add or remove menu items.
- 4. Drag and drop to reorder the menu list.
- 5. Select Add Setting.

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Edit a user role setting

- 1. In Patient Chart Settings, select Edit under the Action column to open the Edit Role Settings side panel.
- 2. Select the plus icon + or the minus icon to add or remove menu items.
- 3. Drag and drop to reorder the menu list.
- 4. Select Save Settings

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Settings Summary

Practice Patient Chart Header Settings

- 1. Allows user to customize the patient chart header settings for the entire practice group.
- 2. This header format will appear for all users in the practice group unless the individual user had saved their own patient chart header format.
- 3. This header format is applied to all patients when the user is viewing their chart.

User Patient Chart Header Settings

- 1. Allows user to customize the patient chart header settings at the user level which will override the practice level patient chart header format.
- 2. This header format will only appear for this user and no other users in the practice group.
- 3. This header format is applied to all patients when the user is viewing their chart.

Role-Level Configuration

In addition to user-specific and practice-wide configurations, our system supports **role-level settings** to provide greater flexibility and control. The settings resolution hierarchy operates as follows:

- 1. User-Level Settings If a specific setting is defined at the user level, it takes precedence.
- 2. Role-Level Settings If no user-level setting is found, the system checks for a setting defined at the role level.
- 3. **Practice-Level Settings** If neither user nor role settings are present, the system applies the setting defined at the practice level.
- 4. System Defaults If none of the above are specified, the system falls back to default values.