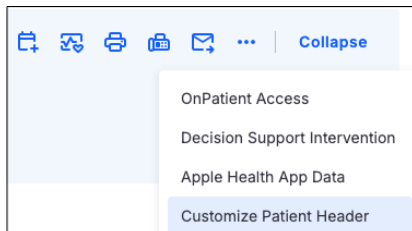# Customize the Patient Chart Header

> 💡 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**.

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.

Customize Patient Header

⠿ Smoking Status	+	
⠿ Language	+	
⠿ Race	+	
⠿ Ethnicity	+	
⠿ Pref Pharmacy	+	

⇄

⠿ OnPatient	—
⠿ Date Added	—
⠿ Prev Appt	—
⠿ Next Appt	—

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Other Settings

Display Patient Photo
Enable to display patient photo in the patient header.
ON

Display Chart ID
Enable to display chart ID in the patient header.
ON

Display CDS Flags
Enable to display CDS flags in the patient header.
ON

Collapsed Patient Header by Default
Enable to display collapsed patient header by default.
OFF

Close   **Save**

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 Chart Side Navigation

Patient Header
Customize patient header based on roles. Select up to 10 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
⌄ 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**.

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**.

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**

Edit Role Settings   ✕

Patient Information

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

All Information   Selected Information (Up to 10)

	All Information	
⠿	Referred by	+
⠿	Primary Ins	+
⠿	Secondary Ins	+
⠿	Patient Balance	+
⠿	Eligibility	+
⠿	Smoking Status	+
⠿	Language	+
⠿	Race	+
⠿	Ethnicity	+

⇄

	Selected Information	
⠿	Provider	−
⠿	Address	−
⠿	Phone	−
⠿	Email	−
⠿	OnPatient	−
⠿	Date Added	−
⠿	Prev Appt	−
⠿	Next Appt	−

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Other Settings

Display Patient Photo   🔵 ON

Enable to display patient photo in the patient header.

Cancel   Restore System Default   **Save Settings**