Customize the Patient Chart Header

Last modified on 11/13/2026 9:30 am EST

Customize from within the patient chart | Customize from Patient Chart Settings

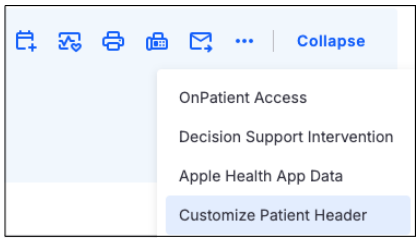
Select this link to watch a video with step-by-step instructions.

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.

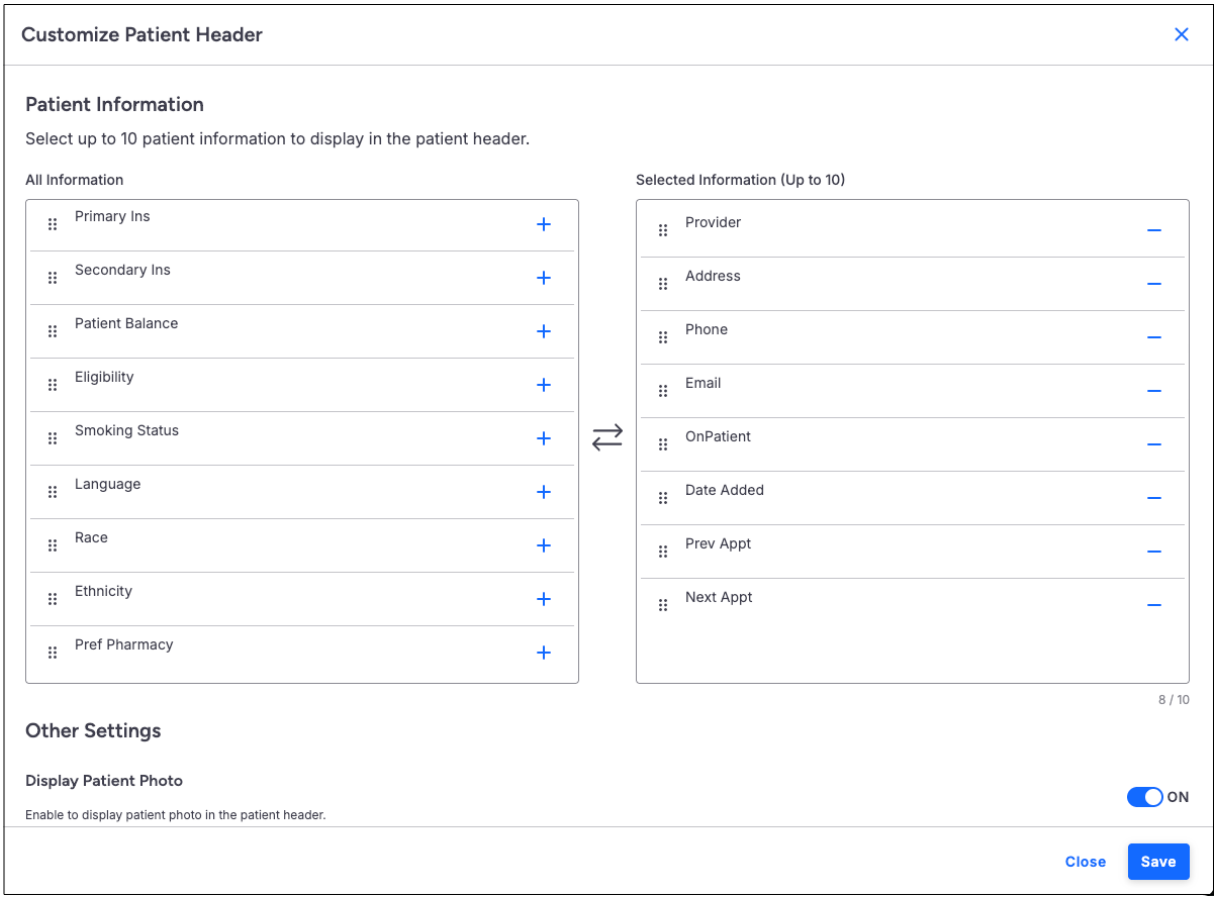
1. In the patient chart, on the right side of the **Patient Header**, select **More actions** ••• to open the dropdown for additional actions and then select **Customize Patient Header**.



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

   *Please note, the apple health app data for providers is no longer supported.

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



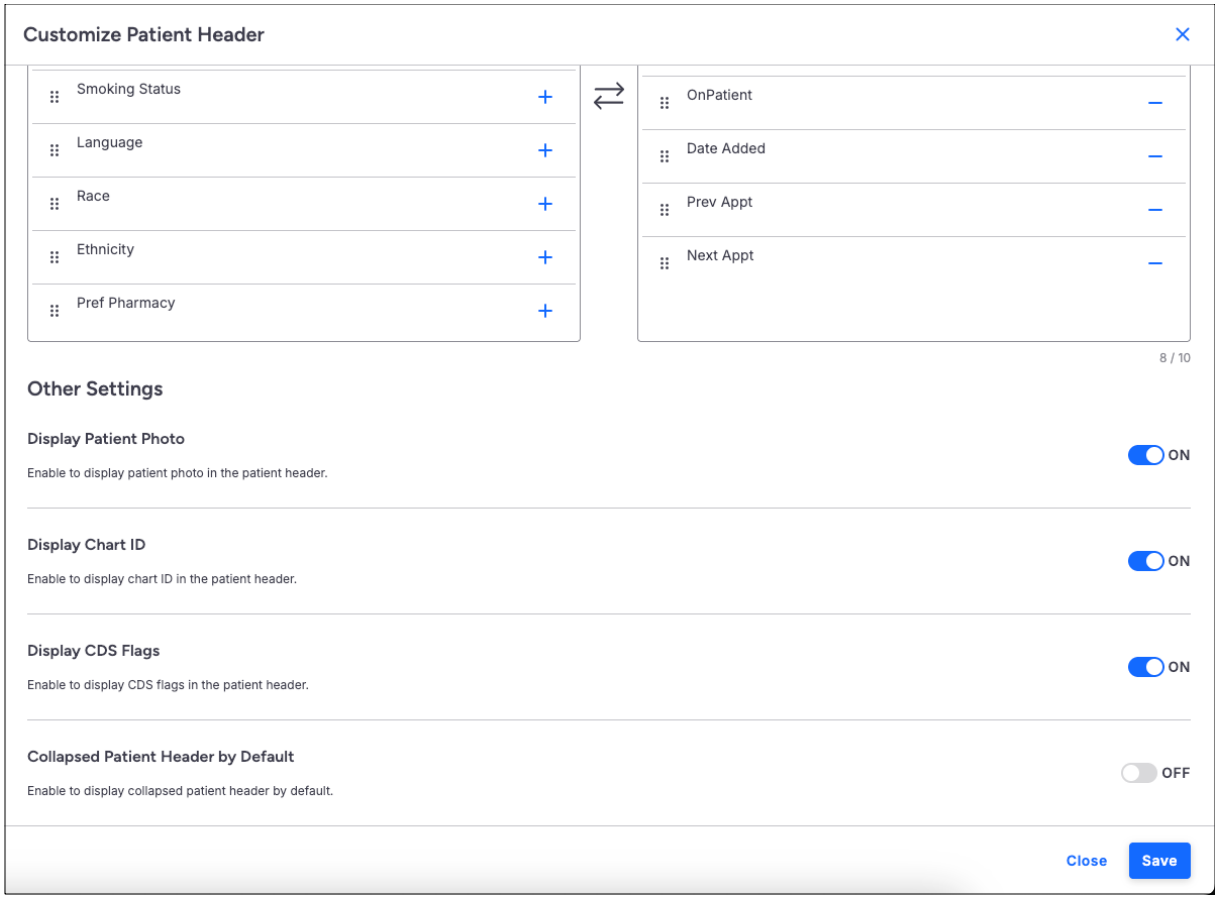
3. Drag and drop to reorder the menu list.

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.

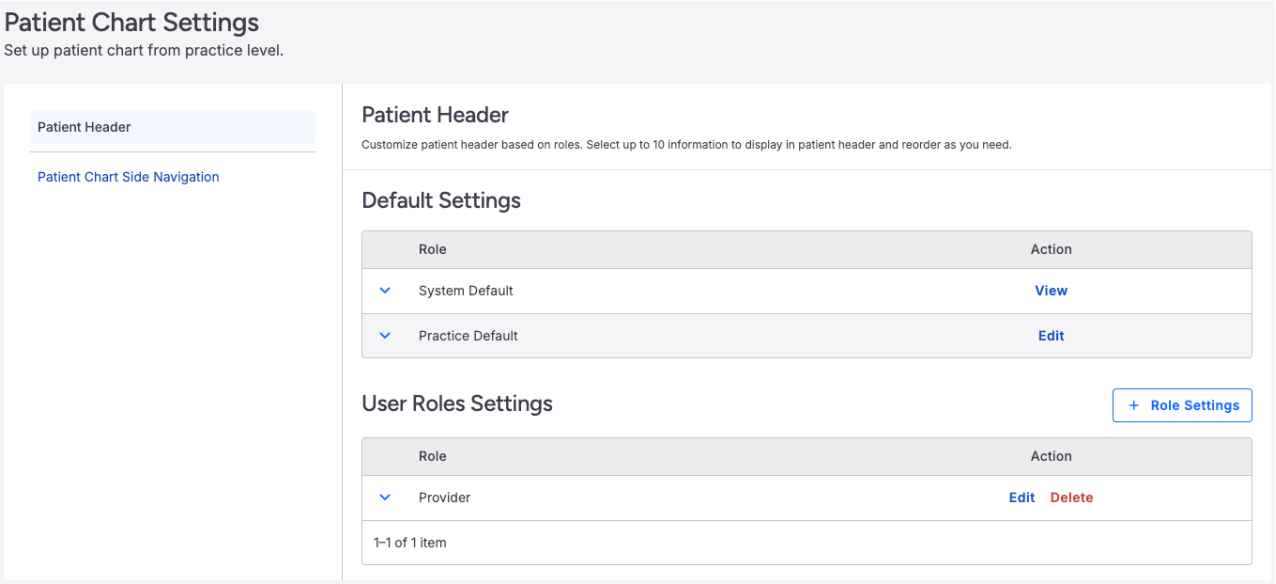


Customize from Patient Chart Settings

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

Select **Account** > **Practice Management** > **Patient Chart Settings** > **Patient Header**.

Default settings



System default

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

Practice default

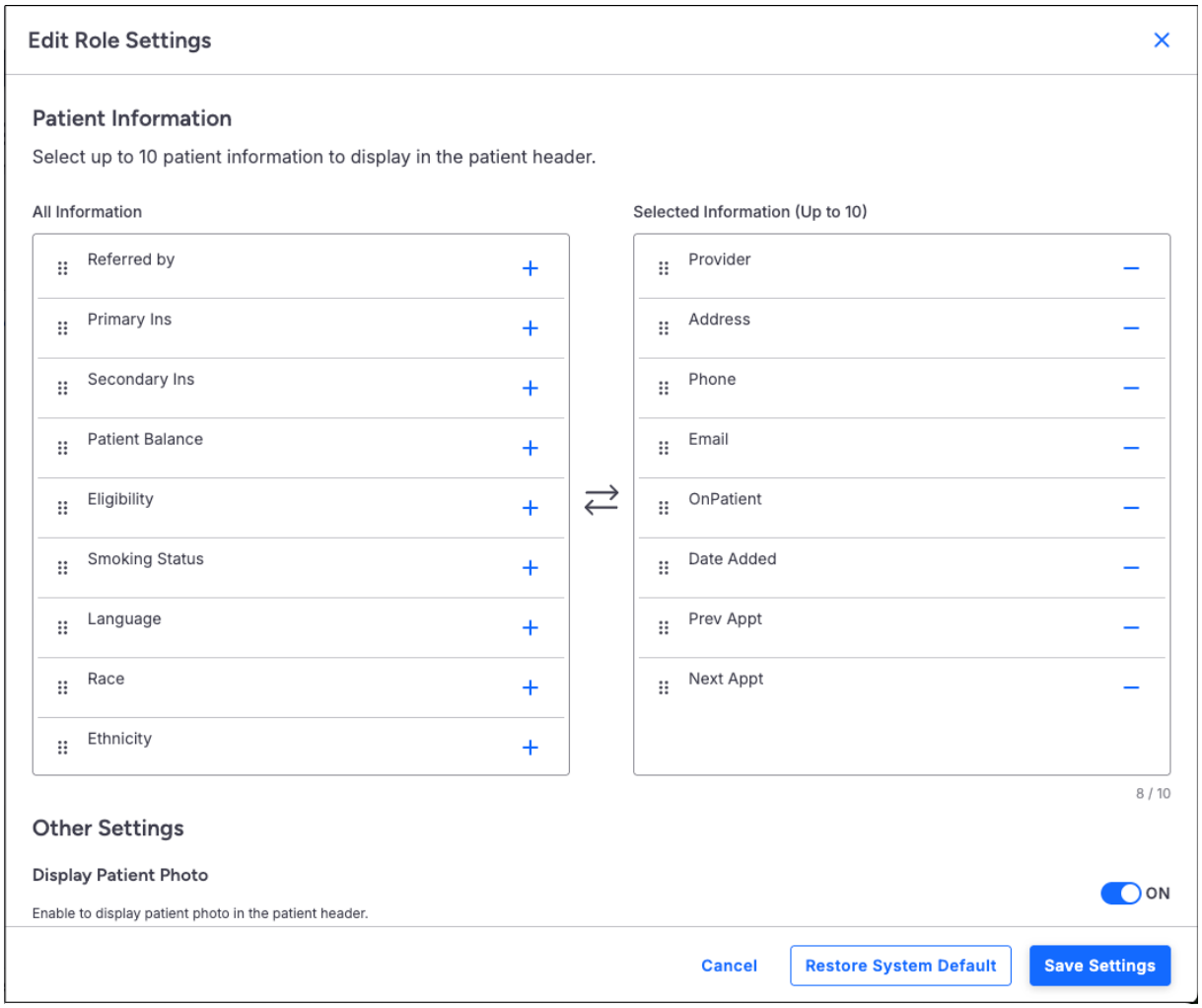
Select **Edit** to view and edit what's shown on the **Patient Header** for the practice.

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.

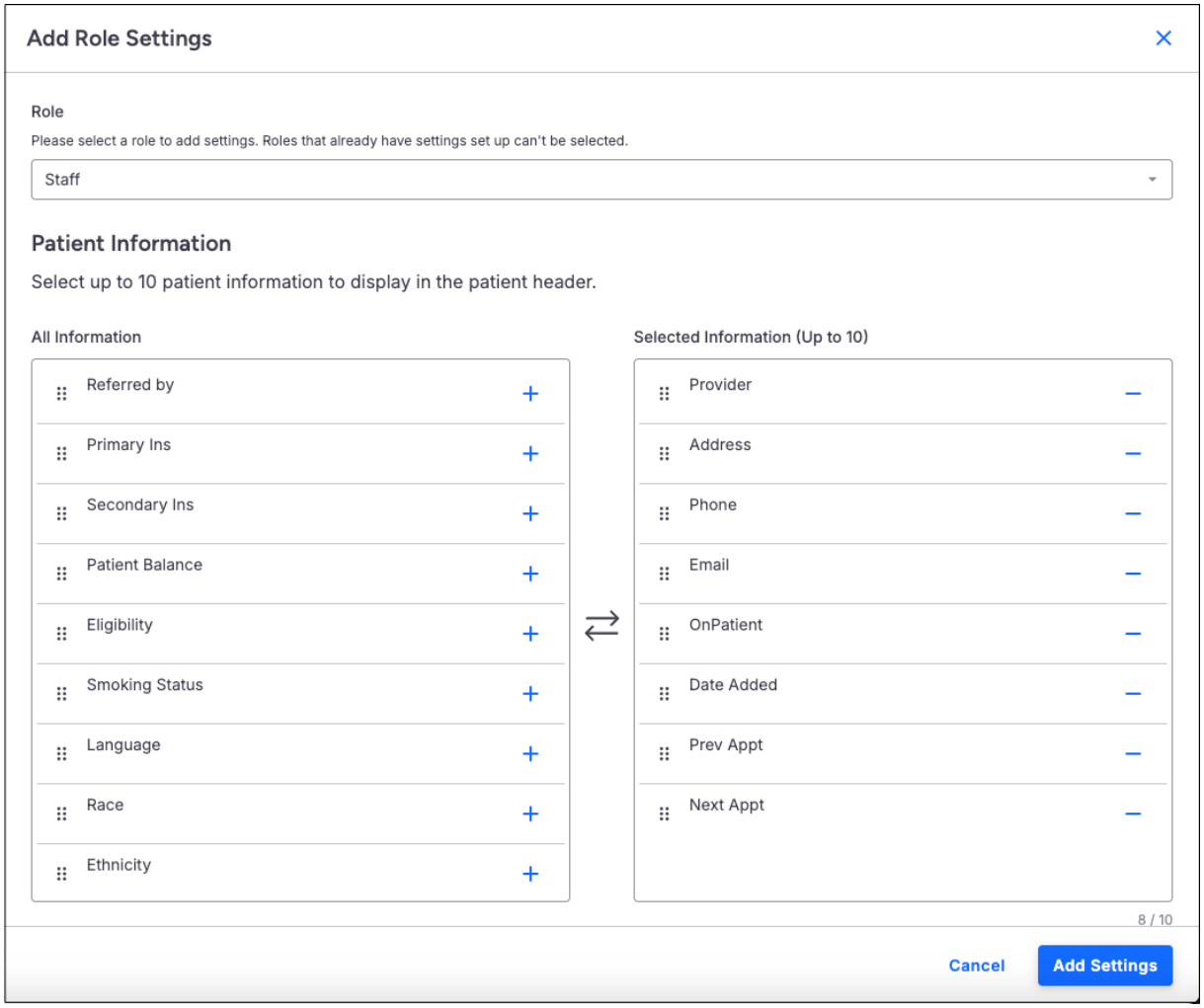
Edit practice default settings

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**.



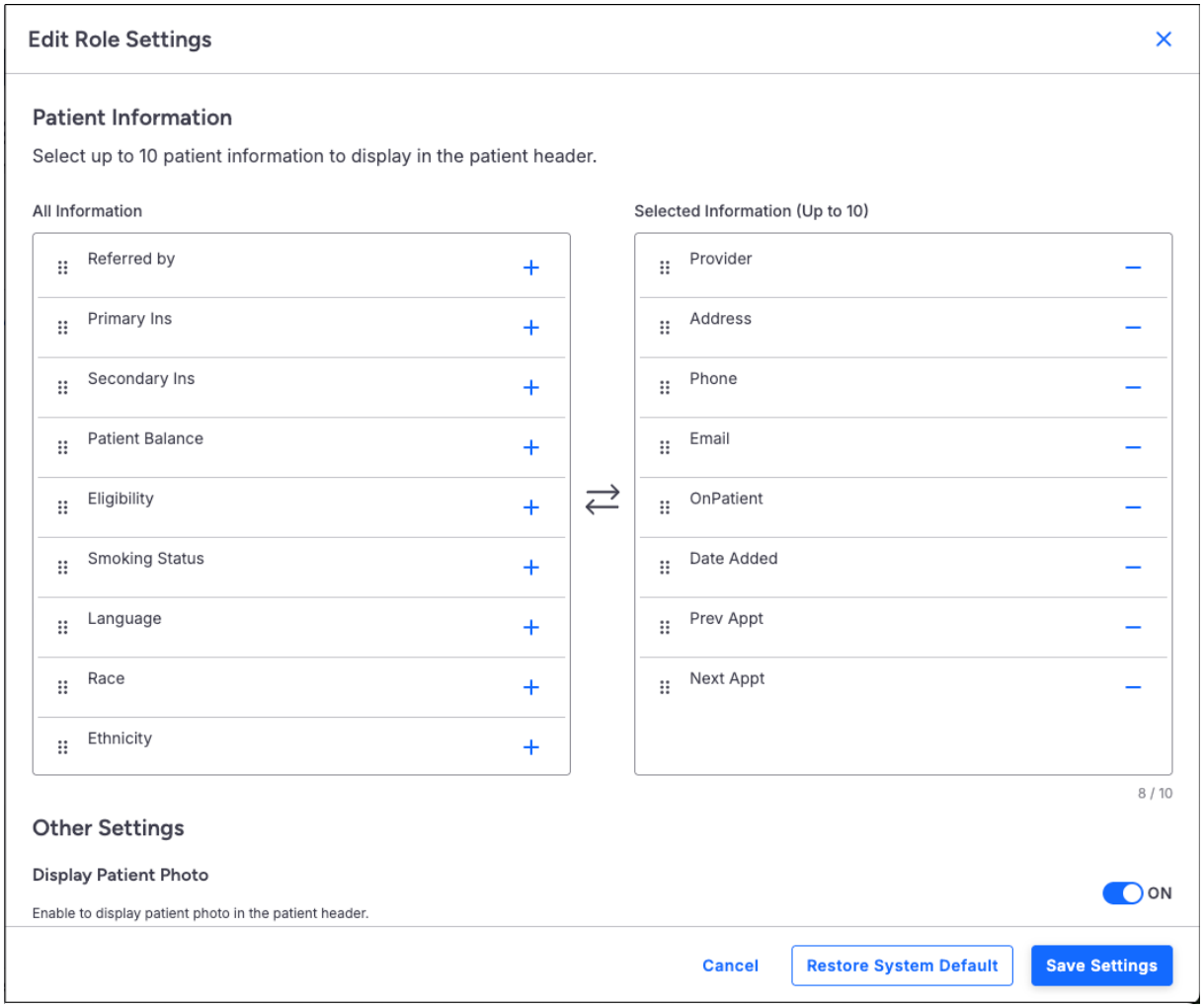
Add a user role setting

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**



Settings summary

Practice Patient Chart Header Settings

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

User Patient Chart Header Settings

- Allows user to customize the patient chart header settings at the user level which will override the practice level patient chart header format.
- This header format will only appear for this user and no other users in the practice group.
- 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:

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