

Customize the Patient Chart Header

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



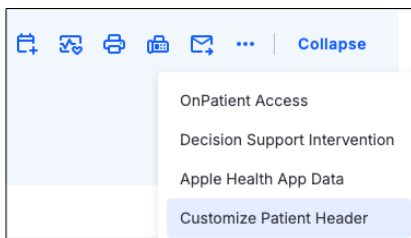
Select [this link](#) to watch a video with step-by-step instructions.

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.

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

Customize Patient Header ✕

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	+
Race	+
Ethnicity	+
Pref Pharmacy	+

⇄

Selected Information (Up to 10)

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.

Close
Save

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 ON
Enable to display patient photo in the patient header.

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

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

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

[Close](#) [Save](#)

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

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**.

Edit Role Settings

Patient Information

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

All Information		Selected Information (Up to 10)
Referred by	+	Provider
Primary Ins	+	Address
Secondary Ins	+	Phone
Patient Balance	+	Email
Eligibility	+	OnPatient
Smoking Status	+	Date Added
Language	+	Prev Appt
Race	+	Next Appt
Ethnicity	+	

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Other Settings

Display Patient Photo

Enable to display patient photo in the patient header. ON

Cancel Restore System Default 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**.

Add Role Settings
✕

Role
Please select a role to add settings. Roles that already have settings set up can't be selected.

Staff

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

All Information

⋮ Referred by	+
⋮ Primary Ins	+
⋮ Secondary Ins	+
⋮ Patient Balance	+
⋮ Eligibility	+
⋮ Smoking Status	+
⋮ Language	+
⋮ Race	+
⋮ Ethnicity	+

↔

Selected Information (Up to 10)

⋮ Provider	-
⋮ Address	-
⋮ Phone	-
⋮ Email	-
⋮ OnPatient	-
⋮ Date Added	-
⋮ Prev Appt	-
⋮ Next Appt	-

Cancel
Add Settings

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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**

Edit Role Settings
✕

Patient Information

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

All Information

⋮ Referred by	+
⋮ Primary Ins	+
⋮ Secondary Ins	+
⋮ Patient Balance	+
⋮ Eligibility	+
⋮ Smoking Status	+
⋮ Language	+
⋮ Race	+
⋮ Ethnicity	+

⇌

Selected Information (Up to 10)

⋮ Provider	-
⋮ Address	-
⋮ Phone	-
⋮ Email	-
⋮ 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

Cancel
Restore System Default
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.

