

Customize the Patient Chart Sidebar

Last modified on 06/16/2026 8:00 pm EDT

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



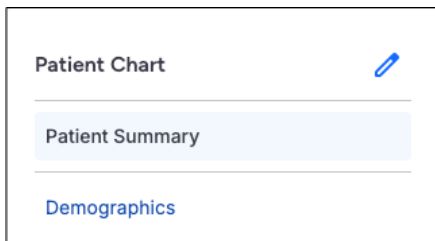
Select [this link](#) to watch a video with step-by-step instructions.



After you turn on the [patient chart permissions](#), you can view and modify the patient chart sidebar from [within the patient chart](#) or from [Patient Chart Settings](#).

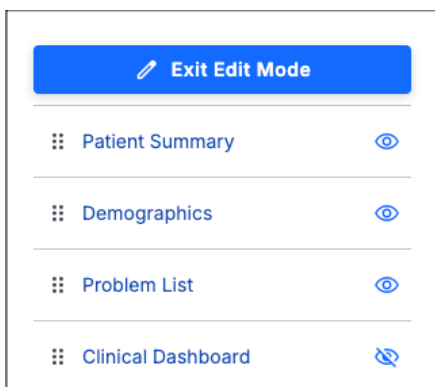
Customize from within the patient chart

You can customize the chart sections in the patient chart sidebar from within the patient chart.

1. Select the pencil icon  next to **Patient Chart** to enter edit mode.



2. Hover over the drag dots icon  (the cursor changes to a grab cursor) and then drag and drop to reorder the menu list.
3. Select the eye icon  to show or hide a section on the menu list.
4. Select **Exit Edit Mode** to return to the menu list.



Customize from Patient Chart Settings

You can customize the chart sections in the patient chart sidebar from [Patient Chart Settings](#).

Select [Account](#) > [Practice Management](#) > [Patient Chart Settings](#) > [Patient Chart Side Navigation](#).

Patient Chart Settings

Set up patient chart from practice level.

Patient Header

Patient Chart Side Navigation

Patient Chart Side Navigation

Customize patient chart side navigation based on roles. Reorder side navigation items and show or hide certain items.

Eligibility Tab Configuration

Please note that the "Eligibility" tab in the patient chart settings is only available to customers with the Billing Module and Real-Time Eligibility enabled. If your practice meets these requirements, you can configure the eligibility screen for both practice-level and role-level settings. If the tab doesn't appear in the patient chart after being enabled, please contact support for assistance.

Default Settings

Role	Action
System Default	View
Practice Default	Edit

User Roles Settings

[+ Role Settings](#)

Role	Action
No results	



The **Eligibility** tab in **Patient Chart Settings** is available only to customers with the billing module and real-time eligibility turned on. If your practice meets these requirements, you can configure the **Eligibility** screen for both practice- and role-level settings.



Create a [support case](#) if the **Eligibility** screen doesn't appear in the patient chart after being turned on.

Default settings

Patient Header

Patient Chart Side Navigation

Patient Chart Side Navigation

Customize patient chart side navigation based on roles. Reorder side navigation items and show or hide certain items.

Eligibility Tab Configuration

Please note that the "Eligibility" tab in the patient chart settings is only available to customers with the Billing Module and Real-Time Eligibility enabled. If your practice meets these requirements, you can configure the eligibility screen for both practice-level and role-level settings. If the tab doesn't appear in the patient chart after being enabled, please contact support for assistance.

Default Settings

Role	Action
System Default	View
Practice Default	Edit

User Roles Settings

[+ Role Settings](#)

Role	Action
Nurse	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 which sections appear on the patient chart sidebar for the practice.

User roles settings

Select **Edit** to view and edit the sections on the patient chart sidebar 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**.

The screenshot shows a dialog box titled "Edit Role Settings" with a close button (X) in the top right corner. Below the title is the section "Patient Chart Side Navigation" with the instruction "Drag and drop to reorder and decide what you would like to see in your patient chart side navigation." The dialog is divided into two columns: "All Side Navigation Items" and "Selected Side Navigation Items".

All Side Navigation Items:

- Growth Charts (+)
- Imaging Orders (+)
- Implantable Devices (+)

Selected Side Navigation Items:

- Patient Summary (-)
- Clinical Dashboard (-)
- Appointments (-)
- Demographics (-)
- Documents (-)
- Eligibility (-)
- Tasks (-)
- Problem List (-)
- Medication List (-)

At the bottom of the dialog are three buttons: "Cancel", "Restore System Default", and "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 Settings**.

Add Role Settings
✕

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

Nurse

Patient Chart Side Navigation
Drag and drop to reorder and decide what you would like to see in your patient chart side navigation.

All Side Navigation Items

⋮ Patient Summary +

⋮ Demographics +

⋮ Problem List +

⋮ Medication List +

⇌

Selected Side Navigation Items

⋮ Immunizations -

⋮ Patient Cost Estimator -

⋮ Growth Charts -

⋮ OnPatient Access -

⋮ Education Resources -

⋮ Communication -

⋮ Family History -

⋮ Imaging Orders -

⋮ Implantable Devices -

Cancel
Add Settings

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 minus icon **-** to add or remove menu items.
3. Drag and drop to reorder the menu list.
4. Select **Save Settings**.

Edit Role Settings



Role

Nurse

Patient Chart Side Navigation

Drag and drop to reorder and decide what you would like to see in your patient chart side navigation.

All Side Navigation Items

⋮ Growth Charts	+
⋮ Imaging Orders	+
⋮ Implantable Devices	+

Selected Side Navigation Items

⋮ Patient Summary	-
⋮ Demographics	-
⋮ Appointments	-
⋮ Clinical Dashboard	-
⋮ Documents	-
⋮ Eligibility	-
⋮ Tasks	-
⋮ Problem List	-
⋮ Medication List	-



Cancel

Save Settings