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

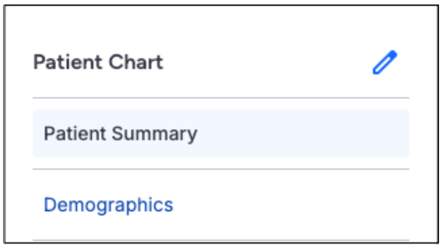
Select this link to watch a video with step-by-step instructions.

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.

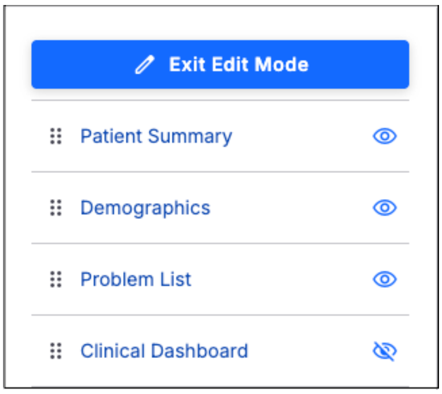
1. Select the pencil icon next to **Patient Chart** to enter edit mode.



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.

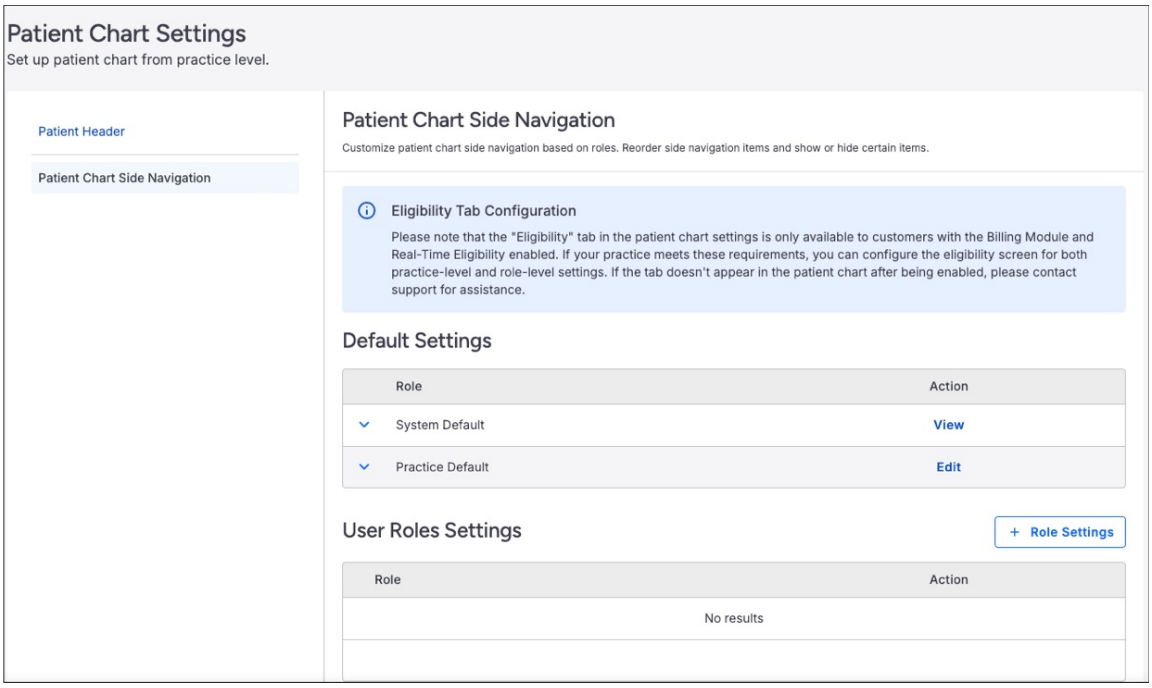
4. Select **Exit Edit Mode** to return to the menu list.



Customize from Patient Chart Settings

You can customize the chart sections in the patient chart sidebar from **Patient Chart Settings**.

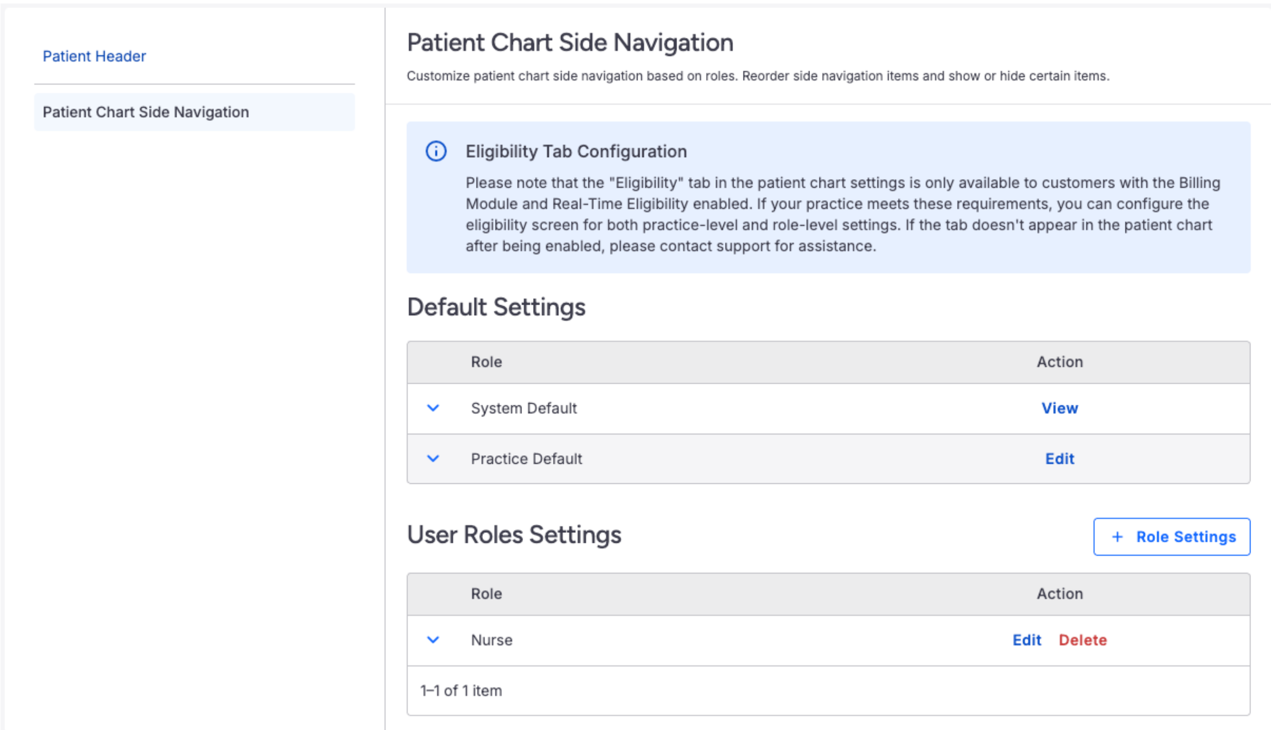
Select **Account** > **Practice Management** > **Patient Chart Settings** > **Patient Chart Side Navigation**.



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



System default

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

Practice Default

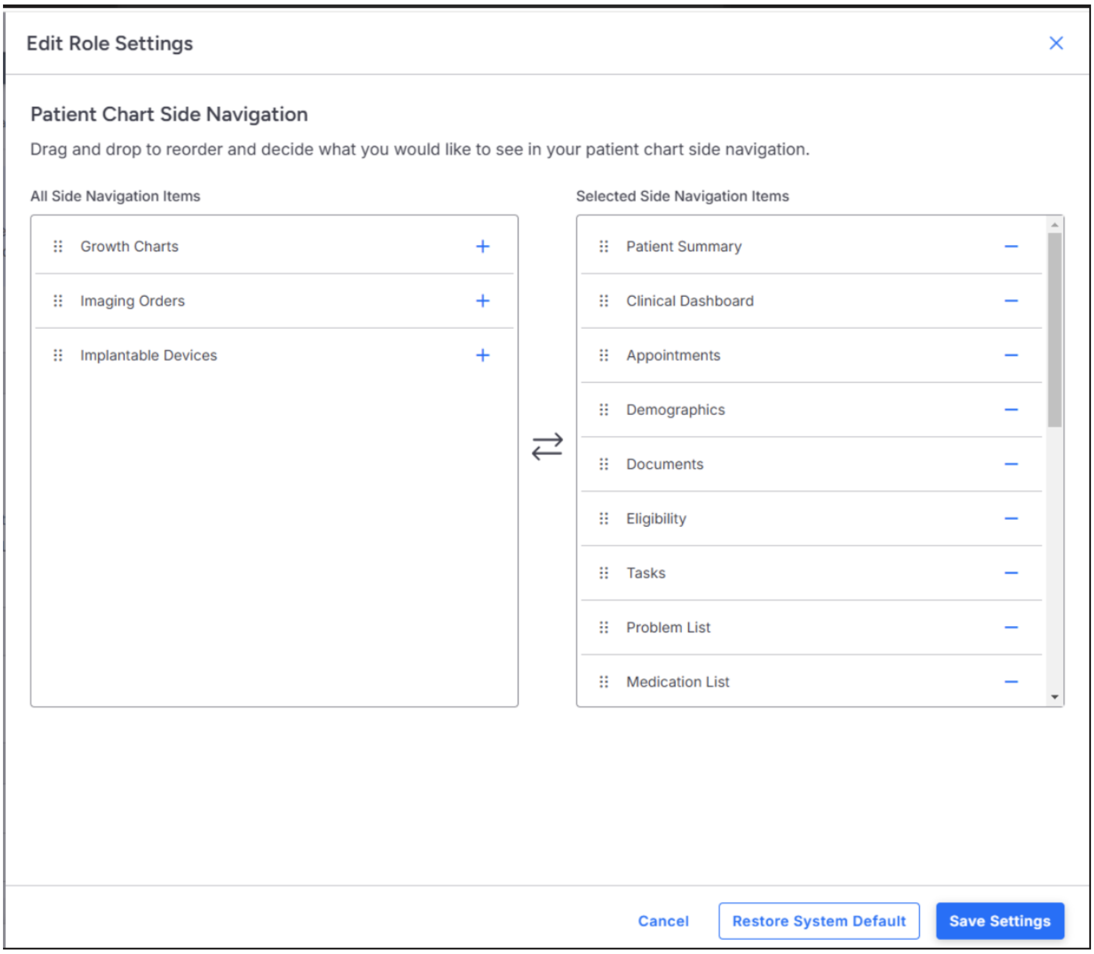
Select **Edit** to view and edit which sections appear on the patient chart sidebar for the practice.

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**.



Add a user role setting

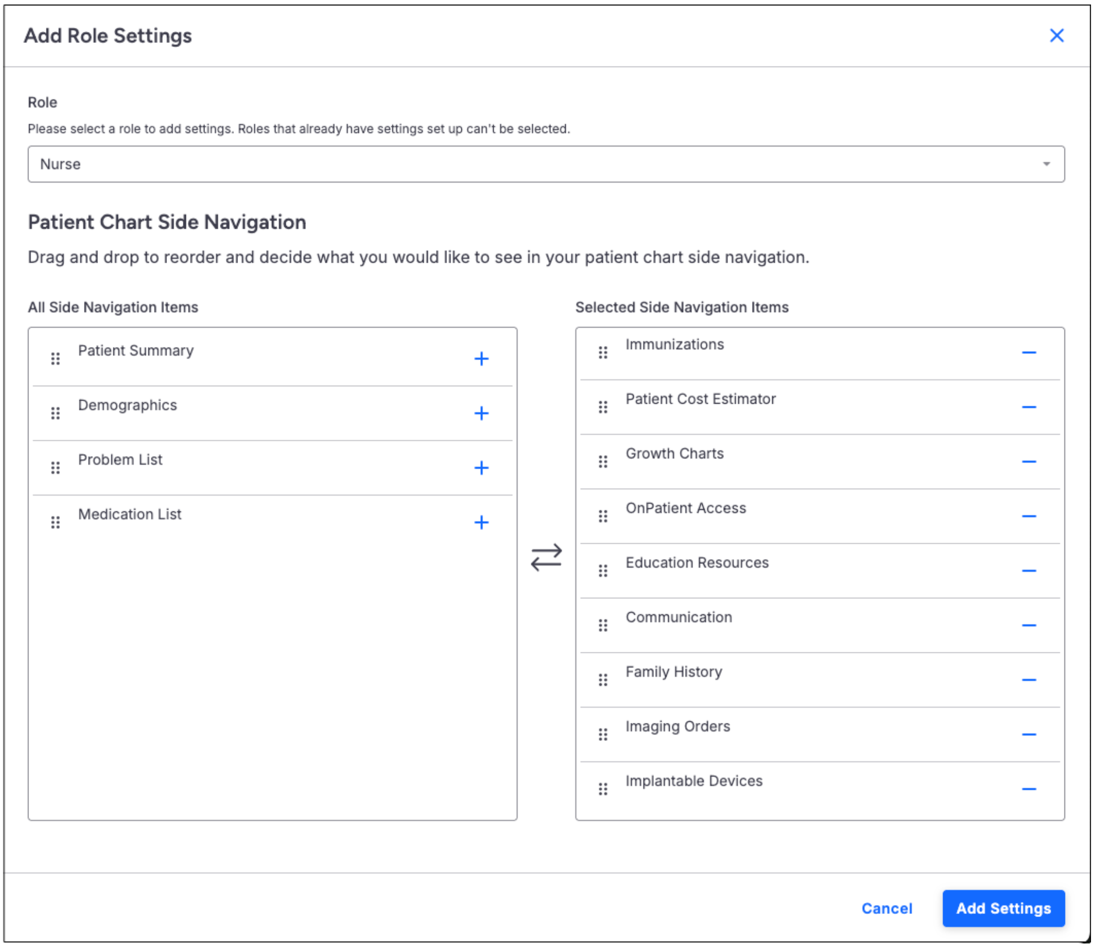
1. In **Patient Chart Settings**, select **Role Settings** to open the **Add Role Settings** side panel.

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**.



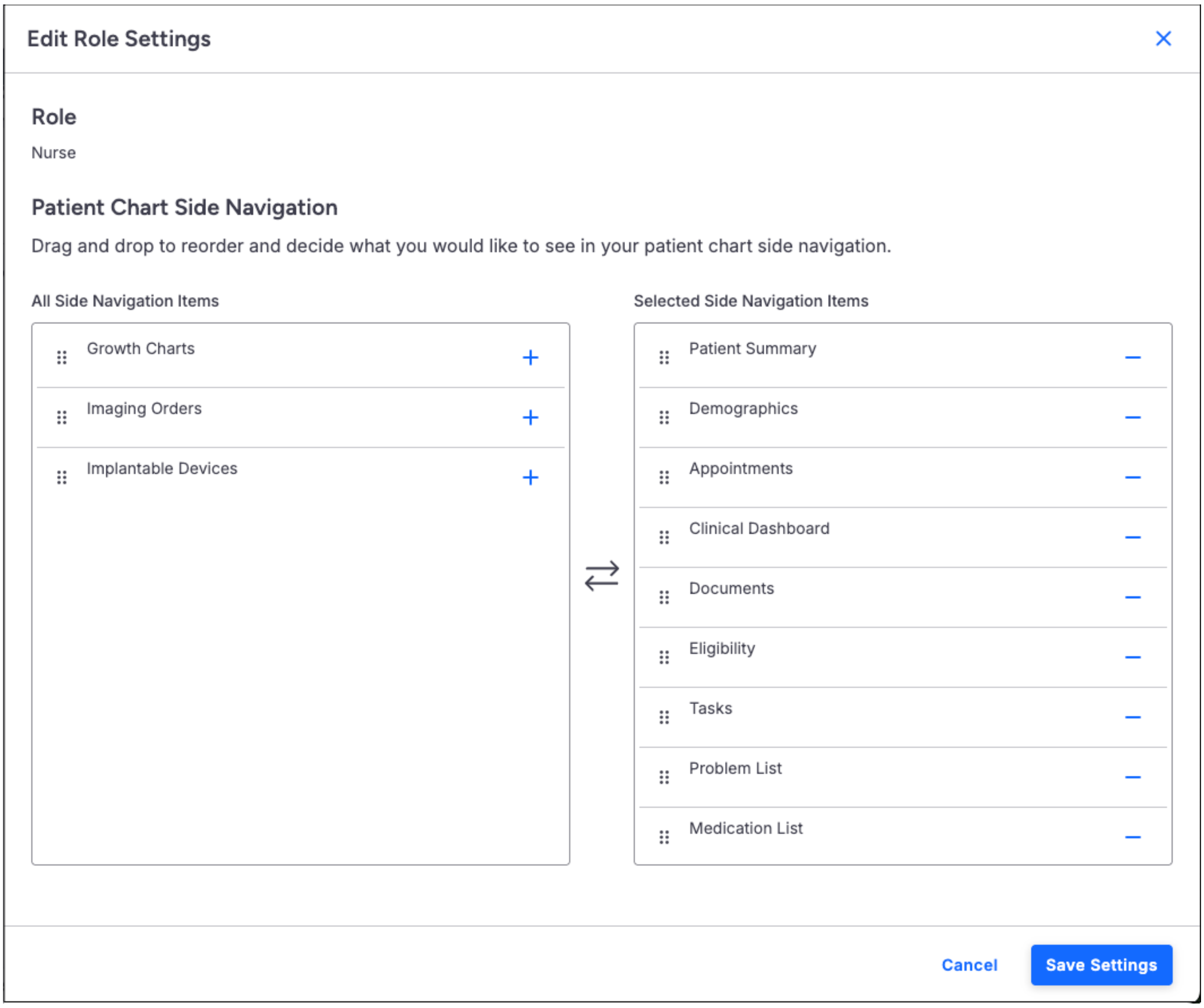
Edit a user role setting

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