Customize the Patient Chart Sidebar

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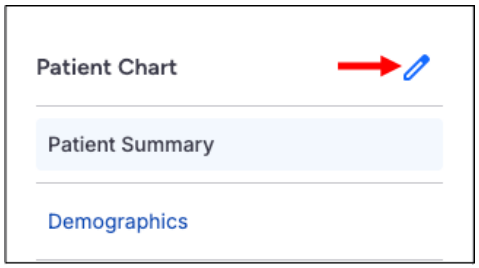
After you turn on the patient chart permissions, you can view and adjust the **Patient Chart Sidebar** from within the patient chart or from **Patient Chart Settings**.

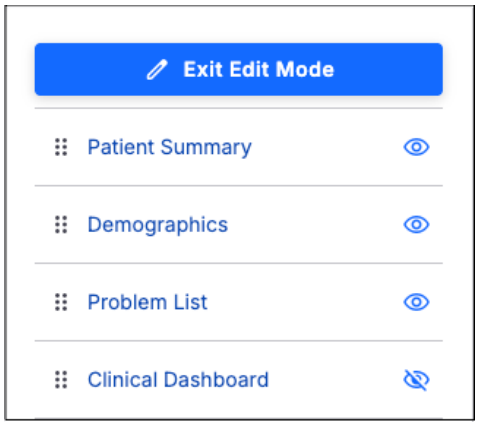
Customize from within the patient chart

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.



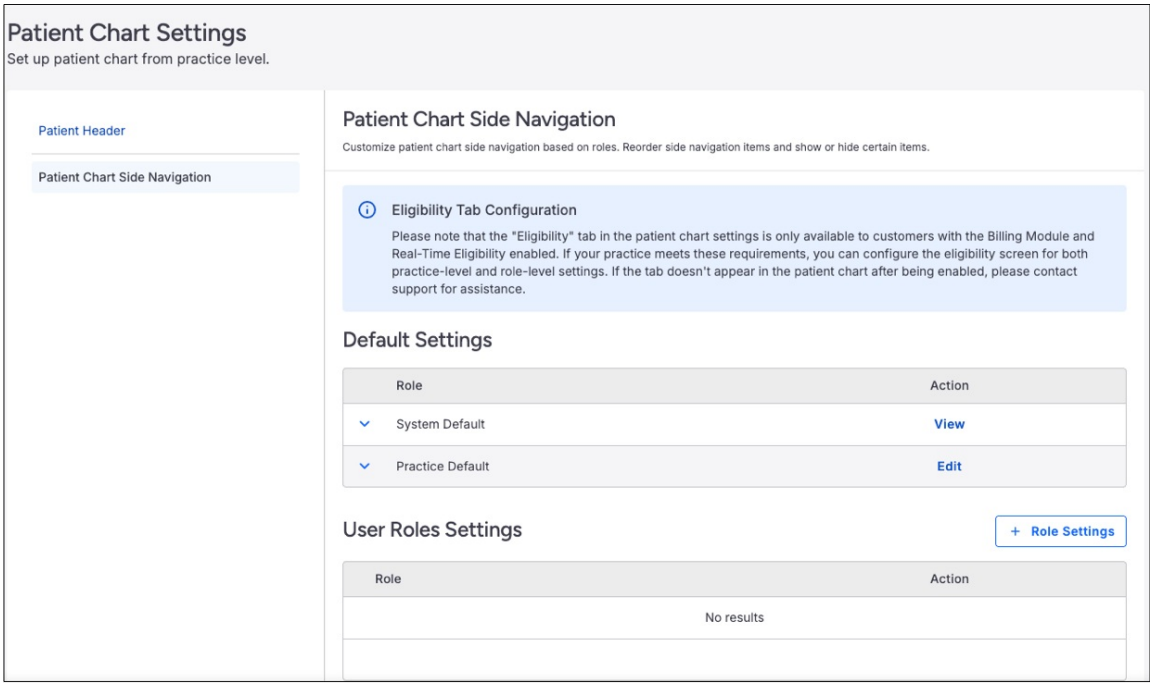
2. Hover over the drag dots icon (the cursor changes to a grab cursor) and then drag and drop to reorder the menu list.
3. Select the eye icon to show or hide a section on the menu list.
4. Select **Exit Edit Mode** to return to the menu list.



Customize from Patient Chart Settings

You can customize the chart sections in the **Patient Chart Sidebar** from within the patient chart.

Select **Account Settings** > **Patient Chart Settings**.



The **Eligibility** tab in **Patient Chart Settings** is only available 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

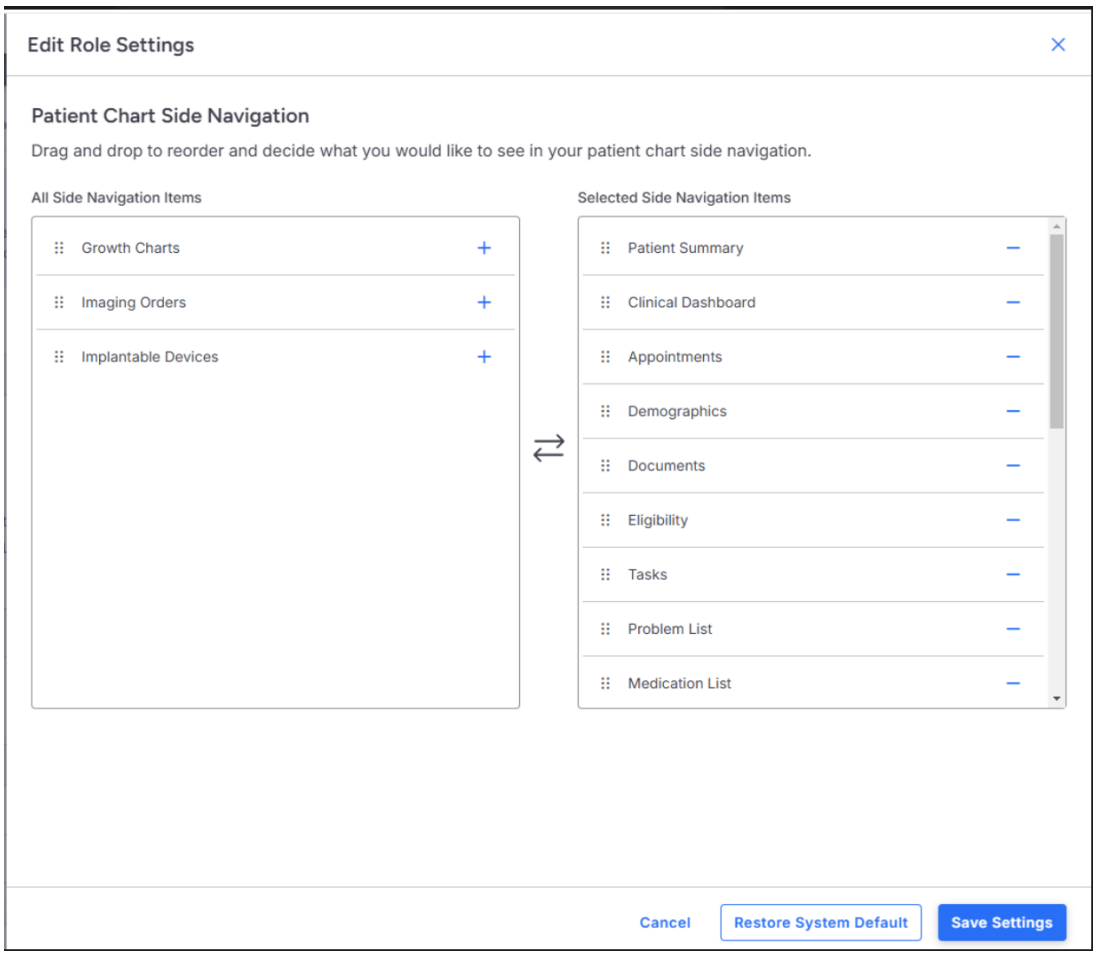
- **System Default:** View which settings are turned on, hidden, and turned off
- **Practice Default:** View and edit which sections appear on the patient chart side navigation for the practice.

User roles settings

You can add or remove the sections on the patient chart sidebar for specific staff roles.

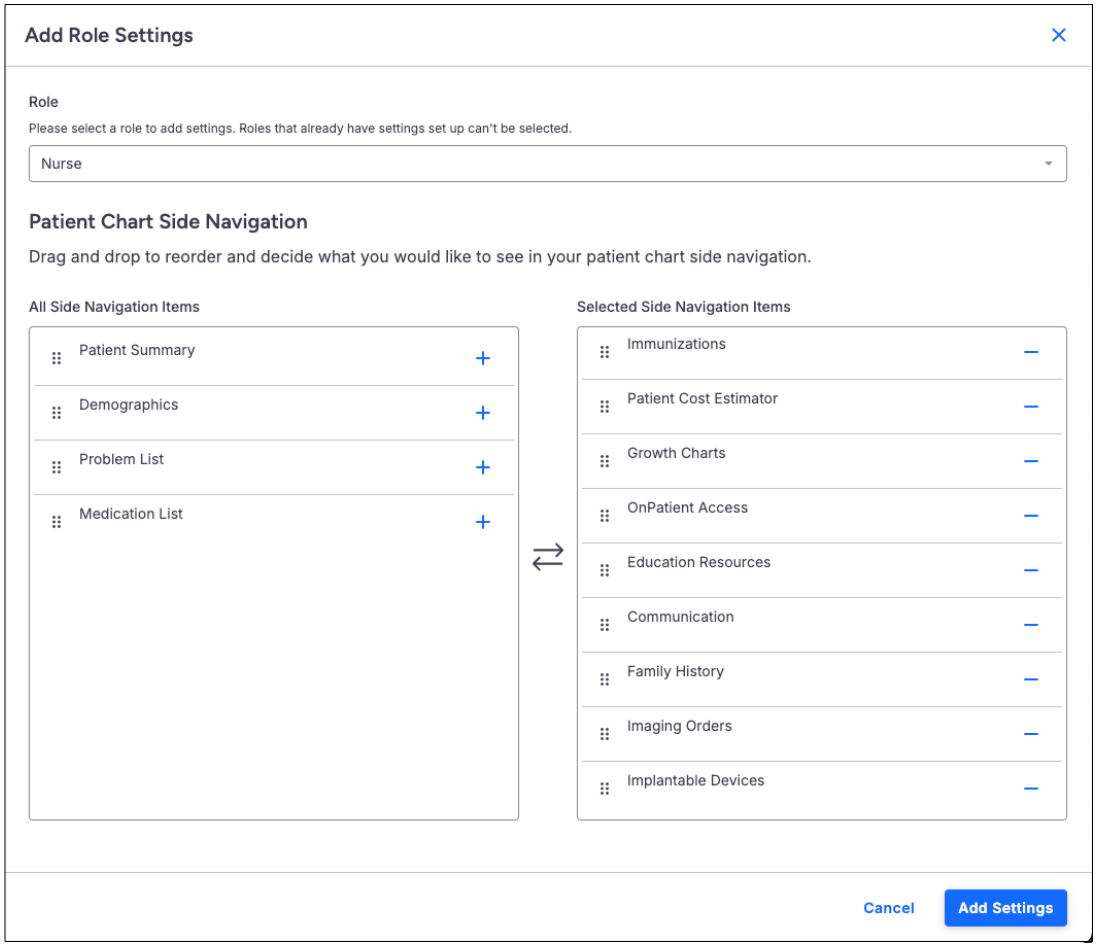
Edit practice default settings

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 user role settings

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 **Save 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