Customize the Patient Chart Sidebar

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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.

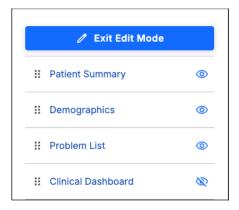
Customize from within the patient chart

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.



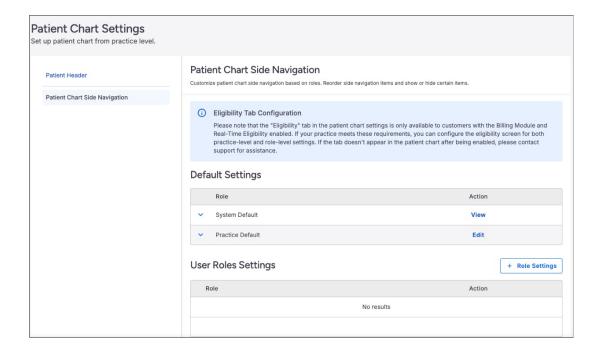
- 2. Hover over the drag dots icon i (the cursor changes to a grab cursor) and then drag and drop to reorder the menu list.
- 3. Select the eye icon on the menu list.
- 4. Select Exit Edit Mode to return to the menu list.



Customize from Patient Chart Settings

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

- 1. Select Account Settings > Patient Chart Settings.
- 2. Select Patient Chart Side Navigation on the sidebar.



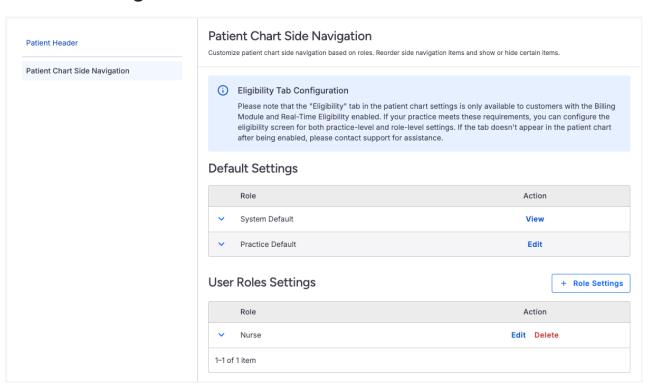


The **Eligibility** tab in **Patient Chart Settings** is only available to customers with the billing module and real-time eligibility turned on. If your practice meets these requirements, you can configure the **Eligibility** screen for both practice- and role-level settings.



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

Default settings



System default

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

Practice Default

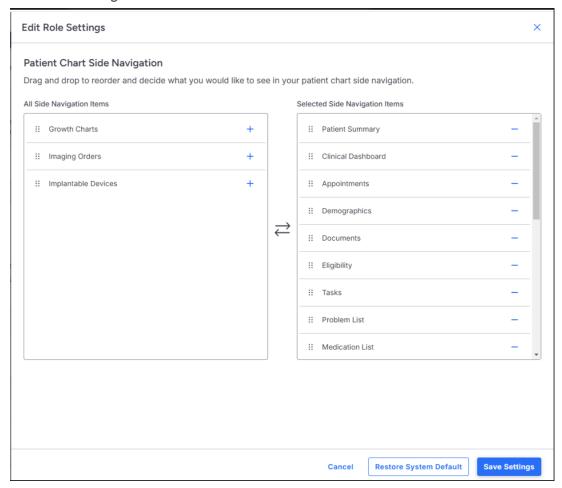
Select **Edit** to view and edit which sections appear on the patient chart sidebar for the practice.

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.

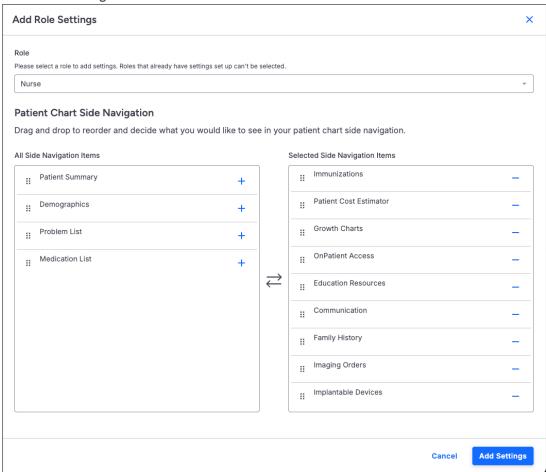
Edit practice default settings

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

