

Customize the Patient Chart Sidebar

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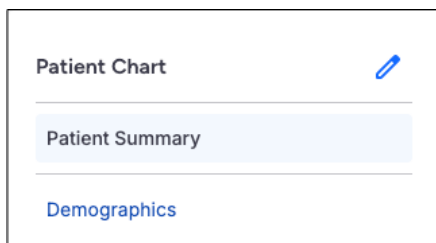
Select [this link](#) to watch a video with step-by-step instructions.



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](#).

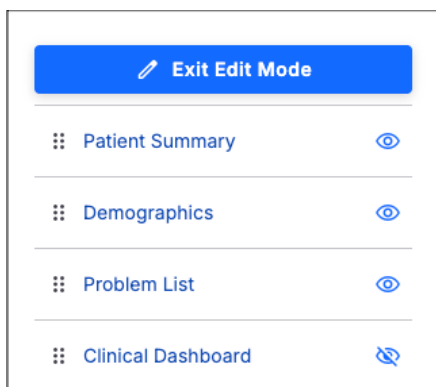
Customize from within the patient chart

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  (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**.

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

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 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

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**.

Edit Role Settings

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

-

Clinical Dashboard

-

Appointments

-

Demographics

-

Documents

-

Eligibility

-

Tasks

-

Problem List

-

Medication List

-

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 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