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How to Customize Your View

How to Change the Display of a Portlet

1. To temporarily change how information is listed,

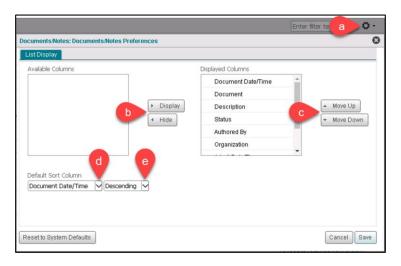
hover over a column header until a down arrow appears. Select the arrow, then select from the menu to:

- Sort in ascending or descending order
- Show/hide the columns that appear in the list
- Apply a filter to display only certain types of information

Note: These changes apply to the current session only

- 2. To **permanently change your view preferences** (for columns that are not locked):
 - a) Select Preferences, then List Display Settings
 - b) To show/hide columns, select an item in Available Columns/Displayed Columns. Select **Display/Hide**
 - c) To change the order in which the columns appear, select the item. Select **Move Up** or **Move Down**
 - d) To change the **Default Sort Column**, select the down arrow, then select an item from the list
 - e) Select the down arrow to specify the sort order

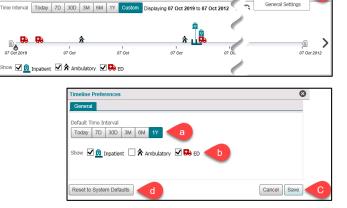
| DocumentsNotes | | | | | | |
|-------------------|---|----------------------|--------------------|-----|-------------------------|--------------------------------|
| | | | | | | ocument Date/Time 🗸 🛛 Document |
| 15 Aug 2019 14:33 | 8 | Physician Consult | ੈ⊉↓ Sort Ascending | | Martins, Elizabeth MD | |
| 15 Aug 2019 14:09 | 4 | Triage Note | X↓ Sort Descending | | Manuel, Deidra | |
| 03 May 2019 18:06 | 8 | Triage Note | Columns | > | Document Date/Time | |
| 09 Aug 2016 12:10 | 6 | Neurology Consult | Filters | > 🛽 | Document | |
| 28 May 2016 13:59 | 8 | Admission Assessment | Final | | Description | |
| 28 May 2016 11:01 | 8 | Discharge Summary | Amended (A) | | Status | |
| 18 Apr 2016 14:27 | 8 | Psychiatry Consult | Final | | Authored By | |
| 17 Apr 2016 11:04 | 8 | Cardiology Consult | Final | | | |
| 16 Apr 2016 11:27 | 8 | Admission Assessment | Final | | | |
| 15 Apr 2016 15:30 | 8 | Neurology Consult | Final | | | |
| 15 Apr 2016 14:33 | a | Physician Consult | Final | | j Discharge Date/ Hitte | |



How to Set Timeline Preferences

To **permanently change the timeline** for all patients and for every time you log in:

- 1. On the Timeline, select Preferences, then General Settings
- 2. In Timeline Preferences:
 - a) Select the desired default time interval **Note:** It is not possible to select a custom interval
 - b) Select the desired encounter types to display
 - c) Select Save
 - d) Select **Reset to System Defaults** to permanently return to original Timeline preferences
- 3. The Timeline refreshes to reflect the preferences set.







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How to Customize Your View

How to Use Custom Views (My Views)

Creating a Custom View

- From the Patient Care tab, select the **double arrow** on the top of the navigation bar to expand it
- Select the Add New icon
 Note: If the Add New icon is not visible, select the My Views heading or the Expand icon
- 3. Select Single Column Layout or Three Column Layout
- 4. Choose the portlets for your custom view:
 - a) Select an available portlet, then select **Add** OR
 - b) Drag and drop a portlet into the Clinical View Layout frame
- 5. Enter the name of your new view
- 6. Enter a description of the view, as needed (optional)
- 7. Select an appropriate icon for the view
- 8. To change the columns displayed in the portlet:
 - a) Select the Preferences ^O icon and List Display Settings

OR

- b) Three-column layout: select the Actions \equiv icon and select Preferences > List Display Settings
- 9. To change the order of portlets:
 - 1. Drag and drop the portlet above or below other portlets

OR

- 2. Select the up and down arrows
- To <u>remove</u> a portlet from the view, select the **Remove** icon. In Three Column Layout, select the ≡ • button to display **Remove**
- 11. Set the new view as your default clinical view, as desired
- 12. Select Save

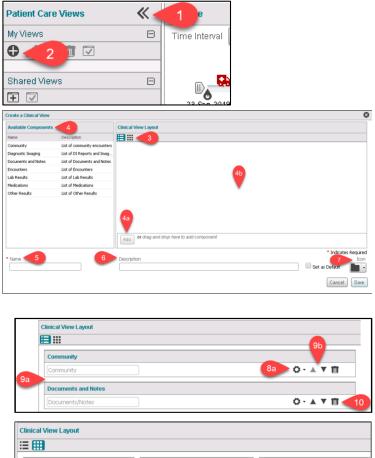
Reminder: By default, the Timeline and Patient Banner display as the first two components at the top of any view and cannot be removed or modified. Remove any unnecessary portlets and/or columns to minimize avoidable viewing of personal health information (PHI).

Diagnostic Imaging Small View

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Other Results Small Vie

Other Results

Cancel

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Icon

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Save

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How to Customize Your View

Working with Custom Views

- 1. With the navigation bar expanded, select a custom view, then perform one of the following actions:
 - a) Edit the view in order to select a different layout, add/remove portlets, change the name, etc. (Follow steps 3-12 of Creating a Custom View)
 - b) **Duplicate** a view to create a copy of the selected view that you can then use for another purpose
 - c) Delete a view when it is no longer required
 - d) Set the selected view as the default view

Note: To change the layout of a clinical view, edit the view and select Single Column layout or Three Column Layout. You will need to add the portlets back into the Clinical View Layout frame.

Creating a Custom View from a Shared View

Shared Views are predefined clinical views. Although Shared Views cannot be modified, you can create your own customized version under My Views.

- 1. With the navigation bar expanded, select a shared view
- 2. Select Add to My Views
- 3. Select the copy from the My Views list
- Select Edit to customize the view. (Follow steps 3-12 of Creating a Custom View)

