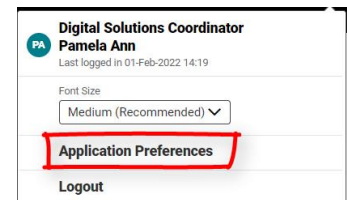# User Preferences Quick Reference Guide

Group/Ungroup preferences in list pane

eChart categories can be set to view clinical information alphabetically (Group) or in reverse chronological order (Ungroup), and it remembers the setting until the next time the user changes it.

IMPORTANT

eChart recommends using <u>Ungroup</u> when viewing Medications and Labs, to display the most current information at the top. The default setting for these categories is <u>Group</u>, so they will need to be changed.

To Ungroup data

From the list pane, select a category and click the <u>Group</u> button to change it to <u>Ungroup</u>.

Change default settings

An eChart user can personalize preferences for basic settings and save them as a default.

- Select preferred **font size**
- Display clinical data by date or category
    - **Category View**– This is the default setting when you log into eChart, the information is categorized by clinical domains, e.g. Labs, Medications, Immunizations, etc.
    - **View by Date**– The information is listed in reverse chronological order.
- **Expand and collapse** clinical data by a category

Step 1 Click on your user initials located on the far right-hand side of the grey application bar.

Step 2 Select Application Preferences to change the settings

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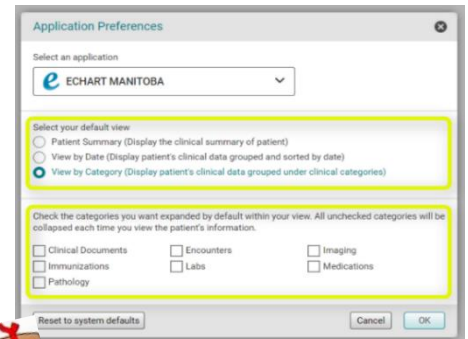**Step 3** There are two settings that control how data is organized and how much displays in the list pane, each time a user logs in.

- **Default View:** The default setting is View by Category. To change the default view to display by date in reverse chronological order, click View by Date. Note: Patient Summary is not an option.

- **Expanding Categories:** The default setting automatically collapses all categories each time information is viewed. To expand certain categories, select the those you would like expanded by default.

Select OK to save your changes.

NOTE: You can always come back to the Application Preferences to restore system defaults

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