

Set Visibility Levels and View Restricted Chart Info

Last Modified on 01/20/2024 4:49 pm EST



OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 14.19

Overview

Each staff member in the Staff Directory is set up with visibility permissions granting them a level of access to patient information. There are five levels of visibility. For an explanation of each visibility permission, click [here](#).

Below is a list of common locations in OP where a Privacy Restriction may be placed in effect.

Allergies

- To set visibility on Allergies, follow the paths below:
 - **Patient Chart > Allergies/Reactions > Add New or Edit Existing Allergy > Visibility drop-down**
 - **Patient Chart > Encounter or Well Visit Note > Allergies/Reactions > Add New or Edit Existing Allergy > Visibility drop-down**
- To view Allergies that have restricted visibility: Select the Include EFR checkbox located at the top of the Allergies window.

Care Plans (*global setting*)

- To set visibility on Care Plans, follow the path below:
 - **Clinical tab > Care Plans > Care Plans/Registries tab > Add New or Edit Existing Care Plan > View Privacy drop-down**
- To view Care Plans that have restricted visibility: In the Patient Chart, select the Include Confidential checkbox located at the top of the window navigation panel.

Chart

- To set visibility on an entire patient's chart, follow the path below:
 - **Patient Chart > Privacy/Sharing > Overall Chart Visibility drop-down**
- To view the patient chart, a user must have appropriate Standard and Emergency Medical Record Visibility settings in the Staff Directory.

Diagnostic Tests (*global setting*)

- To set visibility on Diagnostic Tests at the global level, follow the path below:
 - **Clinical tab > More button (Customize group) > Diagnostic Tests > Select test > Privacy level drop-down**
- To view Diagnostic Tests that have global visibility restrictions, do the following:
 - **Clinical Work:** Select the Include EFR checkbox located at the top of the window.
 - **Patient Chart/Encounter or Well Visit Note:** Select the Include Confidential checkbox in the window navigation panel.

Diagnostic Tests (*patient-specific*)

- To set visibility on a specific patient's Diagnostic Test(s), follow the path below:
 - **Patient Chart > Diagnostic Tests > Add New or Edit > Privacy Level drop-down**
 - **Patient Chart > Encounter or Well Visit Note > Diagnostic Tests > Add New or Edit > Privacy Level drop-down**

- To view Diagnostic Tests that have restricted visibility for a patient, do the following:
 - **Clinical Work:** Select the Include EFR checkbox at the top of the window.
 - **Patient Chart/Encounter or Well Visit Note:** Select the Include Confidential checkbox in the window navigation panel.

Documents

- To set visibility on a patient's Documents, follow the paths below:
 - **Clinical or Practice Management tab > Document Management button > Scan New or Search Existing Document > Privacy Level drop-down**
 - **Patient Chart > Documents > Select document > Privacy Level drop-down**
- To view Documents that have restricted visibility, do the following:
 - **Clinical Work:** Select the Include EFR checkbox at the top of the window.
 - **Medical Records:** Select the Include Private Records (EFR) checkbox at the top of the window.
 - **Patient Chart:** Select the Include Confidential checkbox in the window navigation panel.

Encounters

- To set visibility on an Encounter, follow the paths below:
 - **Main Navigation Panel > Encounters > Edit > Summary > Note Visibility drop-down**
 - **Patient Chart > Encounters > New or Open Note (unfinalized) > Summary > Note Visibility drop-down**
- To view an Encounter with restricted visibility, do the following:
 - **Clinical Work:** Select the Include EFR checkbox at the top of the window.
 - **Patient Chart:** Select the Include Confidential checkbox in the window navigation panel. If this does not permit you to view the note contents, open the encounter note in question, go to the **Alternate Notes** tab, click the **Include records/sections with limited visibility (EFR)** checkbox, and click **Rebuild Summary**.

General Notes

- To set visibility on General Notes, follow the path below:
 - **Patient Chart > General Notes > Add New or Edit Existing Note > Visibility drop-down**
 - **Patient Chart > Well Visits > New or Open Note (unfinalized) > Summary > Note Visibility drop-down**
- To view a Well Visit with restricted visibility, do the following:
 - **Clinical Work:** Select the Include EFR checkbox at the window navigation panel. If this does not permit you to view the note contents, open the well visit note in question, go to the **Alternate Notes** tab, click the **Include records/selections with limited visibility (EFR)** checkbox, and click **Rebuild Summary**.

Medication Favorites (*global setting*)

- To set visibility on Medication Favorites at the global level, follow the path below:
 - **Clinical tab > Medication Favorites > Double-click Medication > Privacy Level drop-down**
- To view Medications that have global visibility restrictions, do the following:
 - **Patient Chart:** Select the Include Confidential checkbox in the window navigation panel.
 - **Encounter or Well Visit Note:** Select the Include EFR checkbox located at the top of the window.

Medications (*patient-specific*)

- To set visibility on a patient's specific Medication, follow the paths below:
 - **Patient Chart > Medications > Add New or Edit Existing Prescription > Notes/Visibility tab > Visibility drop-down**
 - **Patient Chart > Encounter or Well Visit Note > Medications > Add New or Edit Existing Medication > Notes/Visibility tab > Visibility drop-down**
- To view Medications that have restricted visibility for a patient, do the following:
 - **Patient Chart:** Select the Include Confidential checkbox in the window navigation panel.
 - **Encounter or Well Visit Note:** Select the Include EFR checkbox located at the top of the window.

Messages

- To set visibility on a Message, follow the paths below:
 - **Main Navigation Panel > Phone > Add New Message > Visibility drop-down**
 - **Patient Chart > Messages > Add New Message > Visibility drop-down**
- To view a Messages that have restricted visibility, do the following:
 - **Message Center:** Select the Include EFR checkbox at the top of the Message Center window.
 - **Patient Chart:** Select the Include Confidential checkbox located at top of the window navigation panel.

Problem List

- To set visibility on Problem List entries, follow the paths below:
 - **Patient Chart > Problem List > Add New or Edit Existing Problem > Visibility drop-down**
 - **Patient Chart > Encounter or Well Visit Note > Problem List > Add New or Edit Existing Problem > Visibility drop-down**
- To view Problem List entries that have restricted visibility, do the following:
 - **Patient Chart/Encounter or Well Visit Note** Select the Include EFR checkbox located at the top of the window.

Risk Assessment (*global setting only for practice created questions*)

- To set visibility on Risk Assessments, follow the path below:
 - **Clinical tab > More (Customize group) > Risk Assessment > Privacy drop-down**
- To view Risk Assessments that have restricted visibility, do the following:
 - **Patient Chart:** Select the Include Confidential checkbox located at the top of the window navigation panel.

Surveys (*global setting*)

- To set visibility on Surveys at the global level, follow the path below:
 - **Clinical tab > More button (Customize group) > Surveys New or Edit Existing Survey > Default Visibility drop-down**
- To view Surveys that have restricted visibility, do the following:
 - **Clinical Work:** Select the Include EFR checkbox at located at the top of the window.
 - **Patient Chart/Encounter or Well Visit Note:** Select the Include Confidential checkbox located at the top of the window navigation panel.

Surveys (*patient-specific*)

- To set visibility on patient-specific Surveys, follow the paths below:
 - **Patient Chart > Surveys > New > Visibility drop-down**
 - **Patient Chart > Encounter or Well Visit Note > Surveys > New > Visibility drop-down**
- To view Surveys that have restricted visibility, do the following:
 - **Clinical Work:** Select the Include EFR checkbox at located at the top of the window.
 - **Patient Chart/Encounter or Well Visit Note:** Select the Include Confidential checkbox located at the top of the window navigation panel.

Well Visits

- To set visibility on Well Visits, follow the paths below:
 - **Main Navigation Panel > Well Visits > Edit > Summary > Note Visibility drop-down**
 - **Patient Chart > Well Visits > New or Open Note (unfinalized) > Summary > Note Visibility drop-down**
- To view a Well Visit with restricted visibility, do the following:
 - **Clinical Work:** Select the Include EFR checkbox at the top of the window.
 - **Patient Chart:** Select the Include Confidential checkbox in the window navigation panel.

Version 14.10

Each staff member in the Staff Directory is set up with visibility permissions granting them a level of access to patient

information. There are five levels of visibility. For an explanation of each visibility permission, click [here](#).

Below is a list of common locations in OP where a Privacy Restriction may be placed in effect.

Show entries

Filter:

Make This Private	Where To Make Private	How to Override Privacy Settings with Appropriate Permissions
Allergies	Patient Chart > Allergies/Reactions > Add New or Edit Existing Allergy > Visibility dropdown	Select the Include EFR checkbox in the top-right area of the Allergies/Rxns window.
Allergies	Patient Chart > Encounter Note > Allergies/Reactions > Add New or Edit Existing Allergy > Visibility dropdown	Select the Include EFR checkbox in the top-right area of the Allergies/Rxns window.
Allergies	Patient Chart > Well Visit Note > Allergies/Reaction > Add New or Edit Existing Allergy > Visibility dropdown	Select the Include EFR checkbox in the top-right area of the Allergies/Rxns window.
Care Plans	Utilities > Manage Clinical Features > Care Plans > Add New or Edit Existing Care Plan > View Privacy dropdown	Patient Chart: Select the Include Confidential checkbox at the bottom-left area of the window.
Chart	Patient Register > Privacy Tab > Overall Medical Records Visibility	Ability to view this patient record will depend upon two settings in your staff user profile. Standard Medical Records Visibility and Emergency Medical Records Visibility .
Diagnostic Tests	Utilities > Manage Clinical Features > Diagnostic Test Setup > Select DX Test > set Default Visibility dropdown	Schedule and Practice Workflow: Select the Include EFR checkbox at the bottom-left area of the window. Patient Chart: Select the Include EFR checkbox at the bottom-left area of the window. Encounter Note: Select the Include EFR checkbox at the bottom-left area of the window. Well Visit Note: Select Include Confidential at the bottom-left of the window.
Documents	Docs > Scan New or Edit Existing Document > Set Privacy Level dropdown	Schedule and Practice Workflow: Select the Include EFR checkbox at the bottom-left area of the window. Chron: Select the Include Private Records (EFR) checkbox at the top of the window.
Encounters	Schedule and Practice Workflow > Encounters	Select the Include EFR checkbox at the bottom-left area of the window.
Encounters	Patient Chart > Encounters	Select the Include Confidential checkbox at the bottom-left area of the window.
General Notes	Patient Chart > General Notes > Add New or Edit Existing Note > Visibility dropdown	Select the Include EFR checkbox at the top of the window.

Make This Private	Where To Make Private	How to Override Privacy Settings with Appropriate Permissions
Medication Favorites	Utilities > Manage Clinical Features > Medication Favorites > Select Medication > set Default Visibility dropdown	See below
Medications	Patient Chart > Medication > Add New or Edit Existing Prescription > Notes/Visibility tab > Visibility dropdown	Select the Include Confidential checkbox at the bottom-left area of the window.
Medications	Patient Chart > Encounter Note > Medications > Add New or Edit Existing Medication > Notes/Visibility tab > Visibility dropdown	Select the Include EFR checkbox at the top of the window.
Medications	Patient Chart > Well Visit Note > Medications > Add New or Edit Existing Medication > Notes/Visibility tab > Visibility dropdown	Select the Include EFR checkbox at the top of the window.
Medications (e-Rx)	Schedule and Practice Workflow > e-Rx > Add New or Edit Existing Prescription > Notes/Visibility tab > Visibility dropdown	Select the Include EFR checkbox at the bottom-left area of the window.
Messages	Schedule and Practice Workflow > Messages > Add New Message > Note Visibility dropdown.	Select the Include EFR checkbox at the bottom-left area of the window.
Messages	Patient Chart > Messages > Add New Message > Note Visibility dropdown.	Select the Include Confidential checkbox at the bottom-left area of the window.
Overview	Patient Chart > Overview	Select the Include Confidential checkbox at the bottom-left area of the window.
Problem List	Patient Chart > Problem List > Add New or Edit Existing Problem > Visibility dropdown	Select the Include EFR checkbox at the top of the window.
Problem List	Patient Chart > Encounter Note > Problem List > Add New or Edit Existing Problem > Visibility dropdown	Select the Include EFR checkbox at the top of the window.
Problem List	Patient Chart > Well Visit Note > Problem List > Add New or Edit Existing Problem > Visibility dropdown	Select the Include EFR checkbox at the top of the window.
Surveys	Utilities > Manage Clinical Features > Survey Administrator > Create New or Edit Existing Survey > Default Visibility dropdown	<p>Schedule and Practice Workflow: Select the Include EFR checkbox at the bottom-left area of the window.</p> <p>Patient Chart: Select the Include Confidential checkbox at the top of the window.</p> <p>Encounter Note: Select the Include Confidential checkbox at the top of window.</p> <p>Well Visit Note: Select the Include Confidential checkbox at the top of the window.</p>
Well Visits	Schedule and Practice Workflow > Well Visits	Select the Include EFR checkbox at the bottom-left area of the window.
Well Visits	Patient Chart > Well Visits	Select the Include Confidential checkbox at the bottom-left area of the window.

Showing 1 to 24 of 24 entries

[Previous](#)

1

[Next](#)

