Enable and Customize the Patient Banner
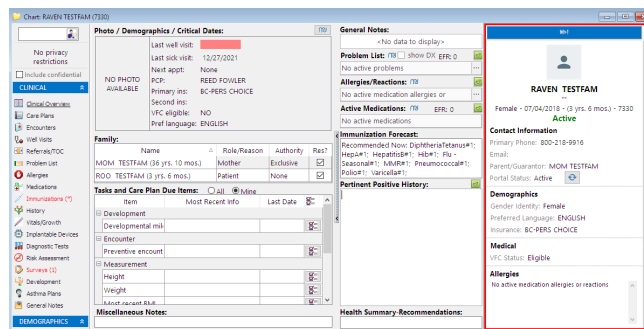
Last Modified on 07/26/2023 1:56 pm EDT

Version 21.1
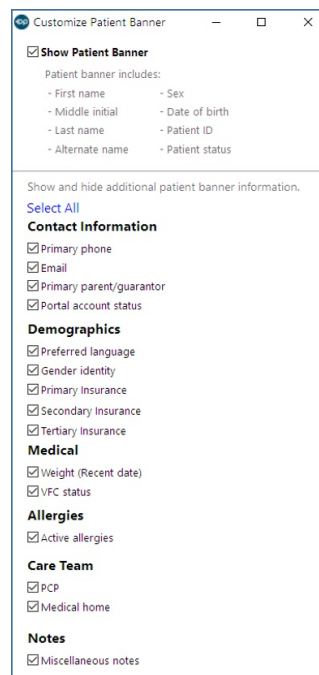
Path: Personalize tab > Patient Banner

About

The Patient Banner can be enabled to display chart-driven patient info on the right-side of the Patient Chart, open Encounters and Well Visits, and messages, as long as a patient is selected. Each logged-in user can decide what information they want to be displayed in the banner and set their preference to display the banner as expanded or collapsed in each of the windows where it is available. A **detailed video** showing how to enable and customize the banner can be found below.

Summary of Steps

1. Navigate to the Customize Patient Banner window by following the path above.
2. Select the **Show Patient Banner** checkbox to enable the banner and activate the bottom section of the window where you can choose additional patient information to include in the banner. To disable the Patient Banner, deselect the checkbox.
3. Select the checkboxes for the information you want to include in the banner and deselect checkboxes for the information you don't want to see.

4. Click the **Save** button.

Detailed Video

Learn how to enable and customize the Patient Banner and save a preference for the banner to be collapsed in the Patient Chart.

> 📌 **Note**: The video below may not show all of the available customization options for the Patient Banner. See the image under Step 3 above for an up to date list of the available options.

> 🎞 **Tip**: To enlarge the video, double-click it, or click the**Fullscreen** button ⛶ . When you're done viewing, press**Esc** to exit fullscreen mode.
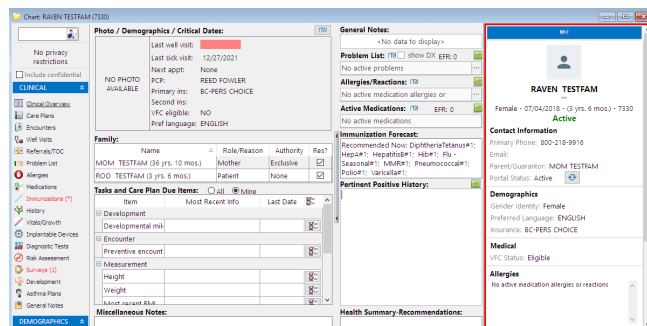
Your browser does not support HTML5 video.

Version 21.0

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