

Documentation contains a cumulative list of patient documents. Predefined system level filters are available within the Display dropdown to pair down the documents a user has on view. Advanced filters can be built, based on individual preferences for user level filters.

## Creating Personal Filters

Filters can be created using Document Status, Encounter, Document Types, Author and more.

**STEP 1:** Navigate to **Documentation**.

**STEP 2:** Select **Advanced Filters**.

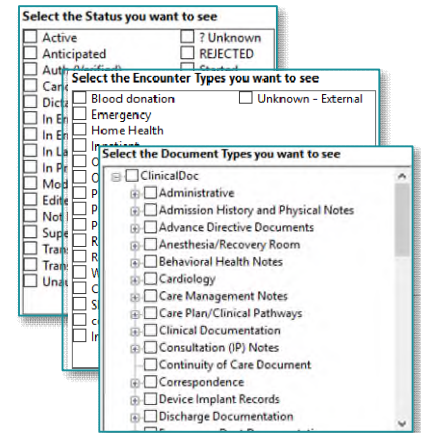
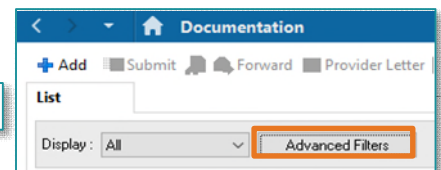


**STEP 3:** Select **New** at the bottom.

- This is necessary to save the settings to be available individually under the Display dropdown.

**STEP 4:** Select the desired criteria:

- Status: Select the status of the documents to pull into the filter.
- Encounter Type: Select the encounters to pull into the filter.
- Document Type: Select the Document Type to pull into the filter.
  - Select the + next to the Document type to drill to specific Note Types within that folder.
- Additional Filter Settings: Indicate how far back, who the author or contributor was for a note.

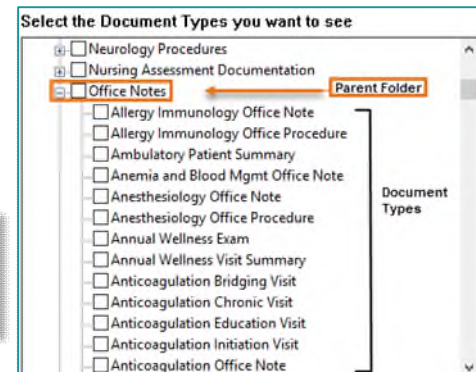
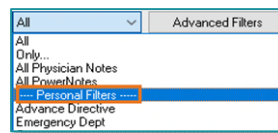


**STEP 5:** Select **Apply**.

- An alert will fire asking to save the filter, select **Yes**.

**STEP 6:** Name the filter and select **Save**.

**STEP 7:** Locate the filter under the **Personal Filter** line of the display dropdown.



**NOTE:** When creating filters based on documents, doing so at the parent folder vs. individual document type will reduce filter maintenance requirements, should any document types be updated or added.