

## From the Office of Health Informatics Oracle Health (Cerner) Millennium Personal Documentation Filters April 28, 2025

Documentation contains a cumulative list of patient documents. Predefined system level filers are available within the Display dropdown to pare down 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.

- **<u>STEP 1</u>**: Navigate to **Documentation**.
- **<u>STEP 2</u>**: Select **Advanced Filters**.
- **<u>STEP 3</u>**: Select **New** at the bottom.
  - This is necessary to save the settings to be available individually under the Display dropdown.

Save

- **<u>STEP 4</u>**: Select the desired criteria.
  - Status:
  - Encounter Type:
  - Document Type:
    - Select the + next to the Document type to drill to specific Note Types within the folder.
  - Additional Filter Settings: Indicate how far back and who the author or contributor was for the note.
- STEP 5: Select Apply.
  - An alert will fire asking to save the filter, select **Yes**.
- **<u>STEP 6</u>**: Name the filter and select **Save**.
- **<u>STEP 7</u>**: Locate the filter under the **Personal Filter** line of the display dropdown.
- <u>NOTE</u>: 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.

For questions regarding process and/or policies, please contact your unit's Clinical Educator or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.

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