

Documentation contains a cumulative list of patient documents. Predefined system level filters 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.

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:**
- **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**.

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.

