## **PowerChart/FirstNet Tip: How to Permanently Change Search Criteria**

You may prefer to change the search criteria one time and have that carry through to every patient chart that you open. Like temporarily changing search criteria, permanently changing this criteria is tab-specific and will only be applied to your profile. Once you make your changes on all the tabs you would like to set, you must log out in order for your changes to take effect. There are slightly different steps for the Documents/Reports tab; those tab specific instructions are at the bottom of this handout.

## To Permanently Change the Clinical Date Range (Search Criteria) for Quick View, Lab Results, Radiology and Form Browser tabs:

- **1.** From inside a patient's chart, select the tab you would like to change.
- 2. From the **Options** menu, select **Properties** to open the *Flowsheet properties* window. (If you are on the **Documents/Reports** tab, go to the **Documents** menu and select **Options**.)
- 3. Click on the **Defaults** tab, and set the desired criteria.

😓 Flowsheet Properties	×
Settings Display Defaults	
These defaults must be saved and the appli	ication restarted for them to take effect.
Default Retrieval Type	Default Range Offsets
C Clinical range	Forward 1 Units Days
O Posting range	Back 3
C Result count	Default Result Count
O New results	Results 100 Years 3
<ul> <li>Admission date to current date</li> </ul>	Number of Hours Previous to the Admit Date: 24
Filter by selected encounter	Re-apply defaults for each new chart.
Adjustment Increments	
1 Days 🔽 or	50 Results
	Save OK Cancel

- 4. Click the **Save** button.
- 5. Click the **OK** button to return to the patient chart window.

**TIP**: You must change the default date range for each tab independently. Repeat steps one through four for each additional tab you wish to change. To change the search criteria for the Documents/Reports tab follow the steps in the next section – Changing Search Criteria for the Documents/Reports tab.

- 6. Close all patient charts and log out.
- 7. Log in to see your changes take effect.

## To Permanently Change the Clinical Date Range (Search Criteria) for the Documents/Reports tab:

- **1.** From inside a patient's chart, select the Documents/Reports tab.
- 2. From the **Documents** menu and select **Options** to open the *Clinical Note Options* window.
- 3. Click on the **Index Defaults** tab, and set the desired criteria.

Clinical Note Options	
Document Types Index Defaults	
Document Lookup	
Documents for selected encou	Inter
<ul> <li>Filtered By</li> <li>Date Range</li> </ul>	C Document Count
Days Forward: 1	Number Of Documents: 10
Days Backward: 5	Adjust Offset Count:
Adjust Offset Days: 2	C Admission - Current
	<ul> <li>All documents</li> </ul>
View Preferences	
Reverse Chronological	efault Expanded Folder
<ul> <li>Reverse Chronological</li> <li>Expand History</li> </ul>	efault Expanded Folder Default Expandable Folders
Reverse Chronological     Expand History     Load First Document in First D	
Reverse Chronological     Expand History     Load First Document in First D  All Folder Types  Addendum Discussion Addendum Microscopic Des Addendum Report Additional Find Advanced Directive-Living V	

**Tlp**: If you are selecting a specific date range in order to span multiple encounters, be sure and <u>uncheck</u> the **Documents for Selected Encounter** checkbox.

- 4. Click the **OK** button to return to the patient chart window.
- 5. Close all patient charts and log out.
- 6. Log in to see your changes take effect.