

From the Office of Clinical Informatics Cerner Millennium Personal Documentation Filters December 11, 2023

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.

Save Save As... Apply New Remove Close

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.
- **<u>STEP 4</u>**: 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**.
- **<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 Clinical Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.



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Advance Directive Documents

Anesthesia/Recovery Room Behavioral Health Notes Cardiology Care Management Notes

Care Plan/Clinical Pathways

Consultation (IP) Notes Continuity of Care Documen

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