# 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.
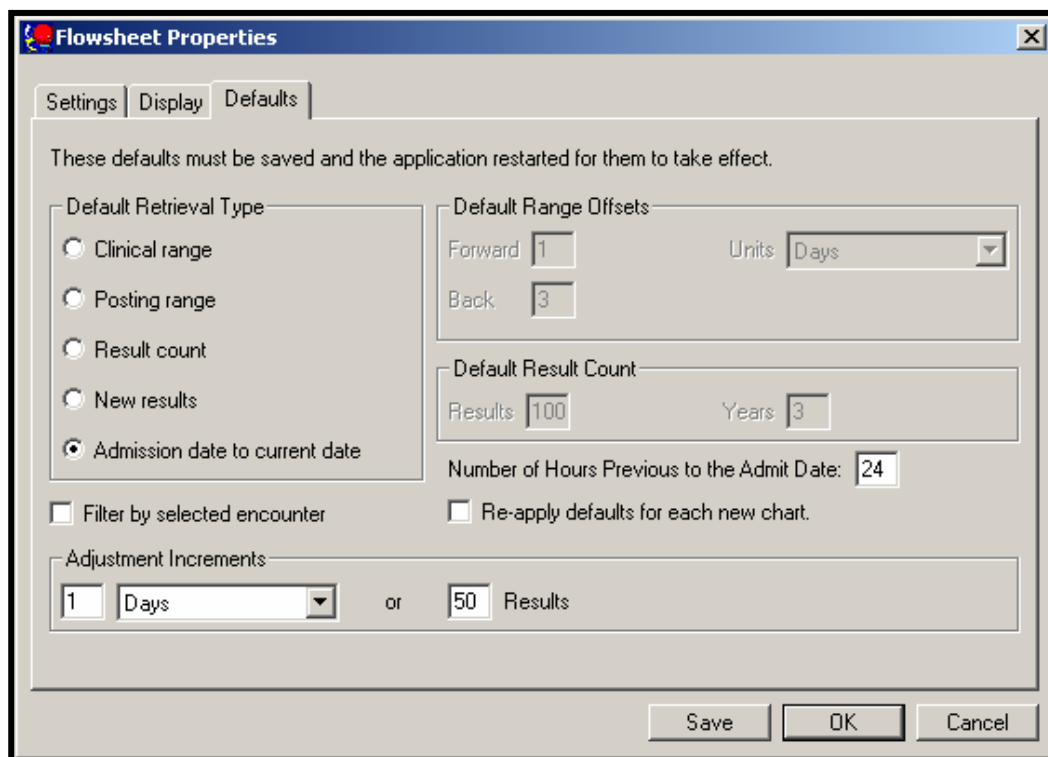

4. Click the **Save** button.

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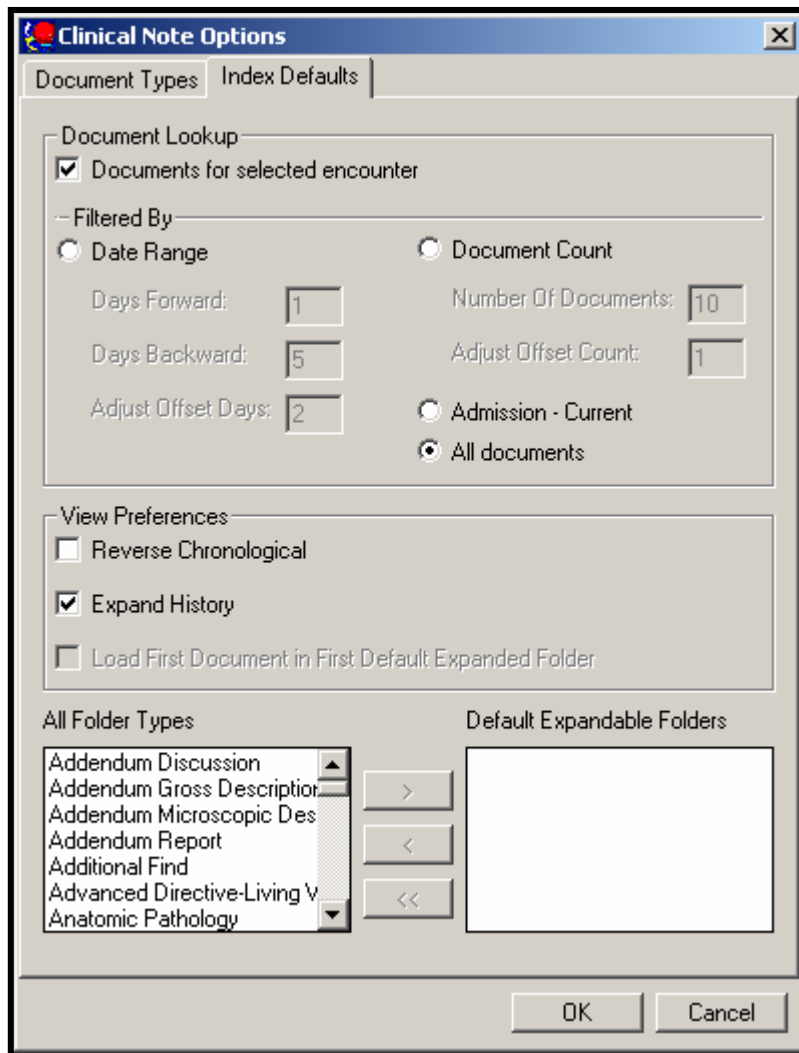
*Tip: If you are selecting a specific date range in order to span multiple encounters, be sure and **uncheck** the **Documents for Selected Encounter** checkbox.*

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.