

First Steps with CareSync Exchange

Quick reference guide (1 of 3 pages)

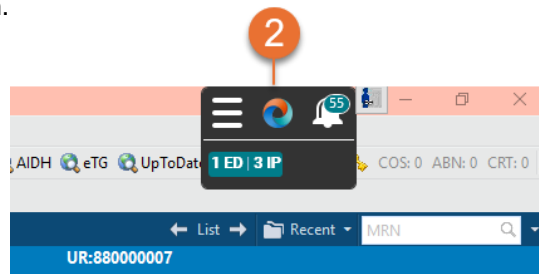
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A guide for getting started with CareSync Exchange.

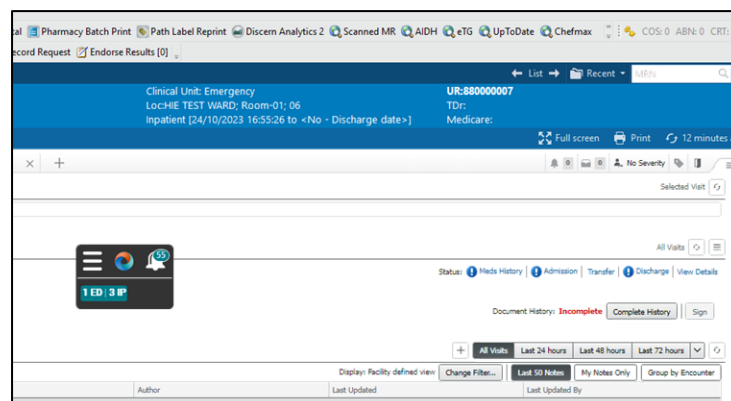
- [How to launch CareSync Exchange](#)
- [Personalising your View](#)
- [Key elements of the widget](#)
- [How to change Font size](#)

Open CareSync Exchange

- 1 Open a patient record from your Patient List.
- 2 The CareSync Exchange Widget will appear in the top right of your screen.



Reposition the widget by clicking and dragging with your mouse to your preferred spot on the screen. It will stay in this chosen location throughout your current EMR session but will reset to its default position when you sign in for your next session.

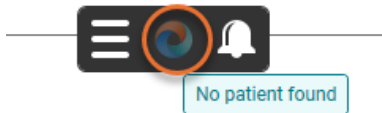


Key Elements of the Widget

1 Personalise application settings, change Font size and access the 'About CareSync Exchange' page on the Clinicians Health Channel.

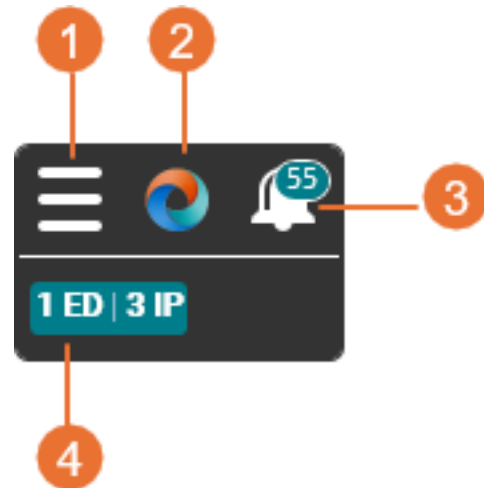
2 Launch CareSync Exchange window.

Where no patient data is available, the CareSync Exchange button will be greyed out (inactive)



3 Notification of new patient information in last 30 days.

4 At-a-glance patient information for the past 12-months.



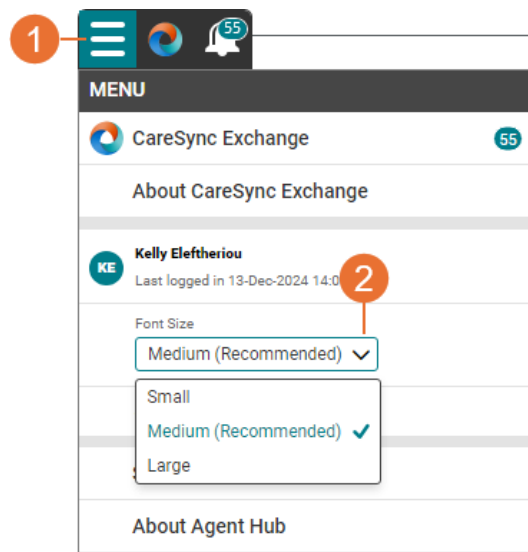
For detailed instruction on **Notifications** please refer to **the Identifying New Patient Information – Notification and Badges** quick Reference Guide.

Change Font Size

1 Select 'Menu'.

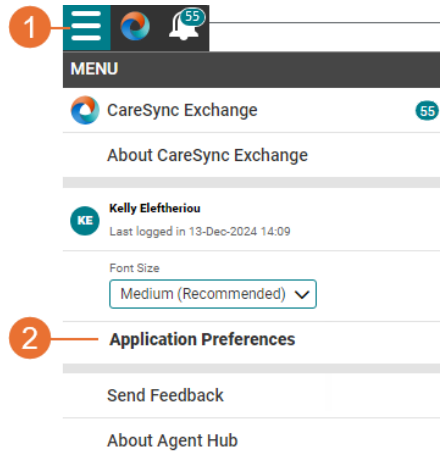
2 Note the default (recommended) font size used within CareSync is Medium.

If required adjust the font size to small or large.

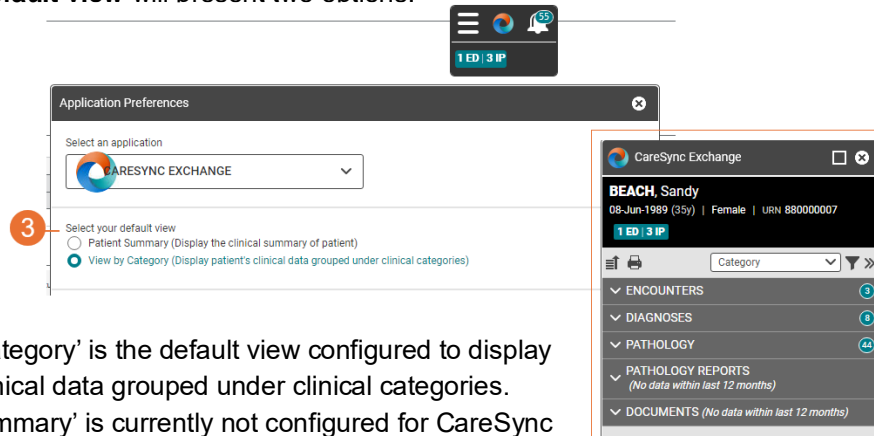


Personalising your View

- 1 Select 'Menu'.
- 2 Select 'Application Preferences'.



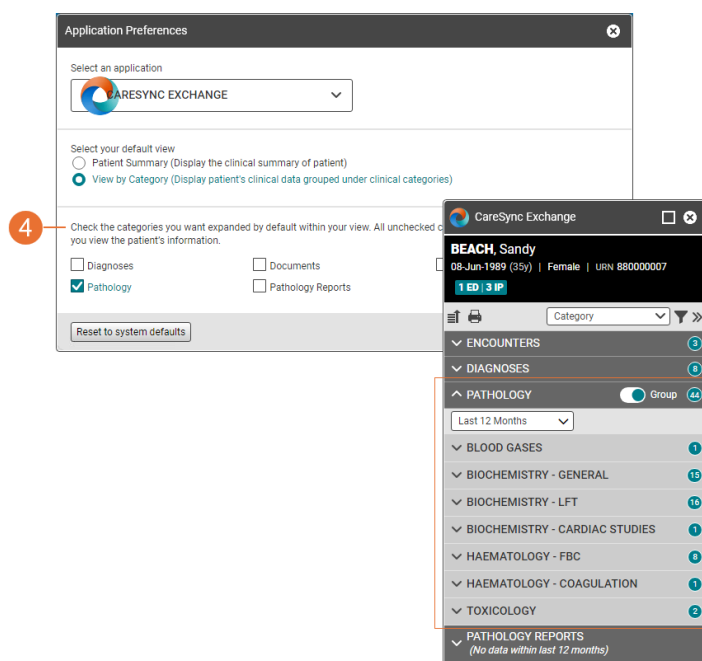
- 3 Select your default view will present two options:



- 'View by Category' is the default view configured to display patient's clinical data grouped under clinical categories.
- 'Patient Summary' is currently not configured for CareSync Exchange.

- 4 CareSync Exchange is configured with all clinical categories grouping collapsed by default.

The **Check the categories you want expanded by default within your view** presents category check boxes for expanding the selected category as a default for your view.



Any changes made to application preferences will take effect on next login.