

# Using the CareSync Exchange Filter to Control Data Views

This guide explains how to use the CareSync Exchange Filter to change the patient data displayed including Delta view, local data visibility, and active, inactive, or cancelled patient card statuses.

- Default filters control the data shown in CareSync Exchange.
- Delta view displays other health service data by default.
- Local data can be displayed alongside external data.
- Patient card statuses can show active, inactive, or cancelled information.
- Use the Filter to control the statuses displayed.

## Using the CareSync Exchange Filter

The CareSync Exchange filter controls the patient data displayed.

## Using the Delta View

Learn how Delta view affects whether patient information is shown from other health services only, or alongside local data.

## Understanding Status Display

Learn how active, inactive, and cancelled patient data appears on CareSync Exchange and how to use the Filter to control which statuses are shown.

## Displaying Categories

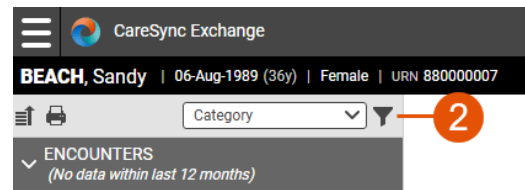
By default, all CareSync Exchange clinical domains containing patient information are shown. You can adjust the filter to display only the domains (categories) relevant to your needs.

## Using the CareSync Exchange Filter

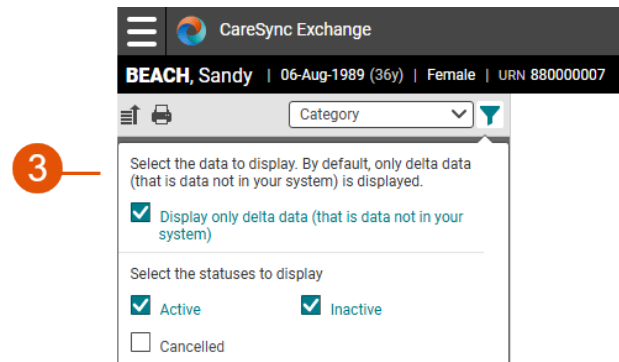
1. Launch CareSync Exchange.




2. Select the Filter icon.



3. The Filter pane will open.



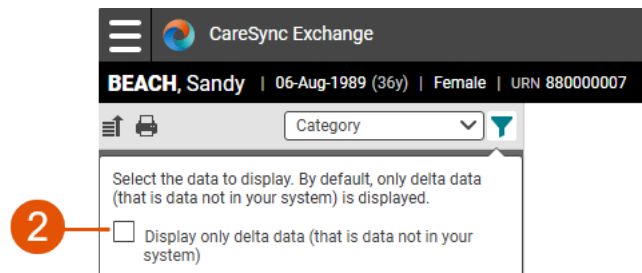
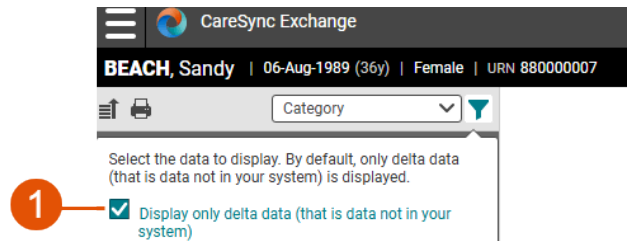
 The Delta view for Parkville precinct health services will display all health services from outside the Precinct itself. The Delta view for health services within the Gippsland region will display all health services from outside the Gippsland region.

## Understanding the Delta View

1. By default, CareSync Exchange displays data from other health services only.

This is known as the Delta view and helps highlight information not already available within your own health service.

2. Uncheck the Display only delta data checkbox to view local data alongside other health service data.



## Understanding Status Display

1. Patient cards in CareSync Exchange display active and inactive information by default.

This is controlled by the Select the statuses to display section in the Filter pane.

Select the data to display. By default, only delta data (that is data not in your system) is displayed.

Display only delta data (that is data not in your system)

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Select the statuses to display

Active  Inactive

Cancelled

2. Inactive data, for example a health condition that has been resolved, remains in CareSync Exchange.

These are still displayed by default but are differentiated with a grey background and italic text.

Select the statuses to display

Inactive

Cancelled

01-Oct-2021 00:00 Inactive

*Finger, right MRI, Org1*

*Z*

3. Cancelled data, for example a future patient booked appointment that was cancelled, remains in CareSync Exchange.

This is not displayed by default but can be seen by selecting the Cancelled status.

When displayed these are differentiated with a grey background and struck through italic text.

Select the statuses

Active

Cancelled

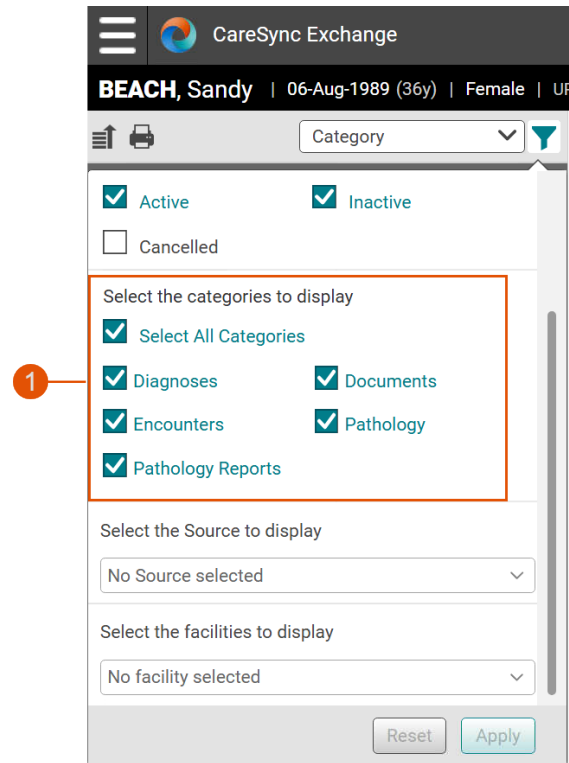
01-Oct-2021 00:00 Cancelled

~~*Bones-SPECT, Org1*~~

~~*Z*~~

## Displaying Specific Categories

1. The CareSync Exchange filter also provides you the flexibility to tailor which categories are visible to you. By default, all categories are shown.



2. Select or deselect categories such as Diagnoses, Documents, Encounters, Pathology and Pathology Reports to control what you prefer to have displayed.
3. Once you've updated your filter selections, click Apply to refresh the view.

