

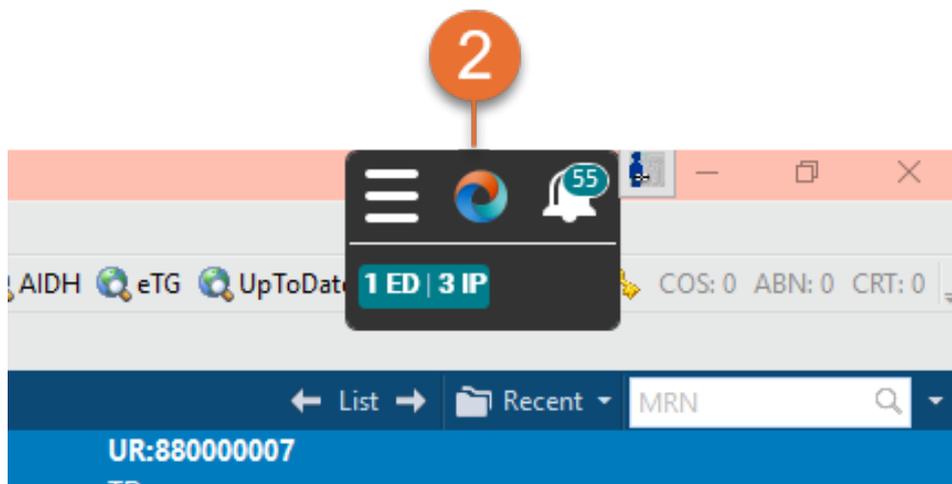
First steps with CareSync Exchange

A guide for getting started with CareSync Exchange.

- [How to launch CareSync Exchange](#)
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- [Getting to know the key elements of the widget](#)
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How to launch CareSync Exchange

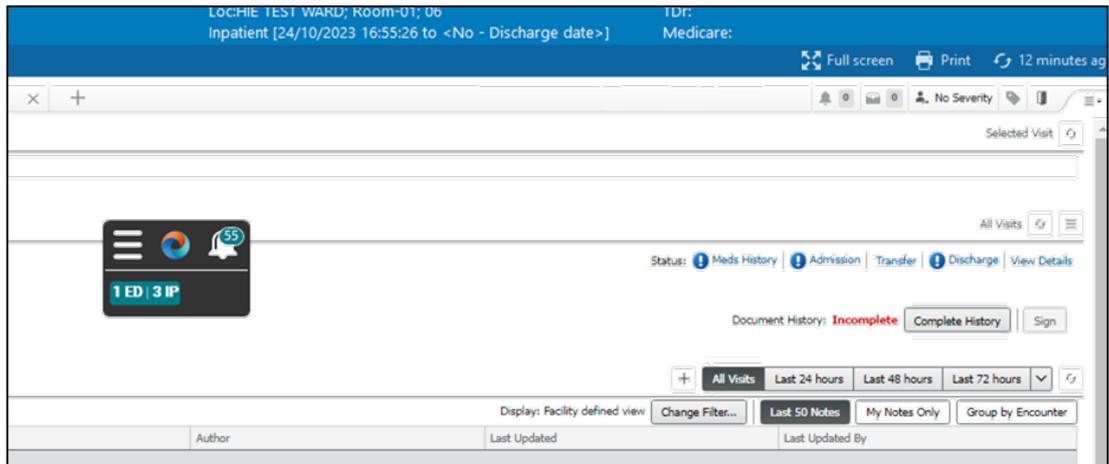
- 1 Open a patient record.
- 2 The CareSync Exchange widget will appear in the top right corner of your screen.



How to reposition the widget on your screen

Reposition the widget by clicking and dragging with your mouse to your preferred spot on the screen.

The widget will stay in your chosen location throughout your current EMR session. It will reset to the default position when you sign in for your next session.



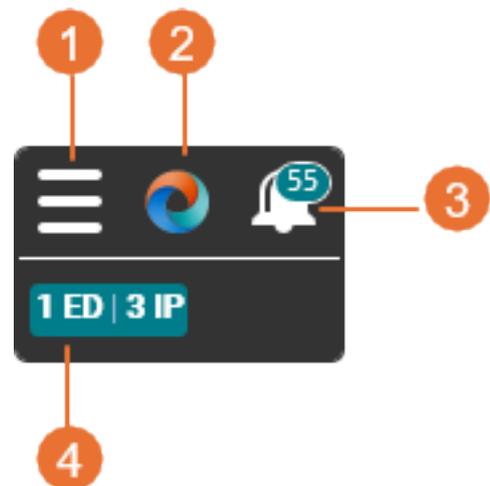
Getting to know the key elements of the widget

- 1 Personalise application settings, change Font size.
- 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 the last 30 days.
- 4 At-a-glance patient information for the past 12-months.

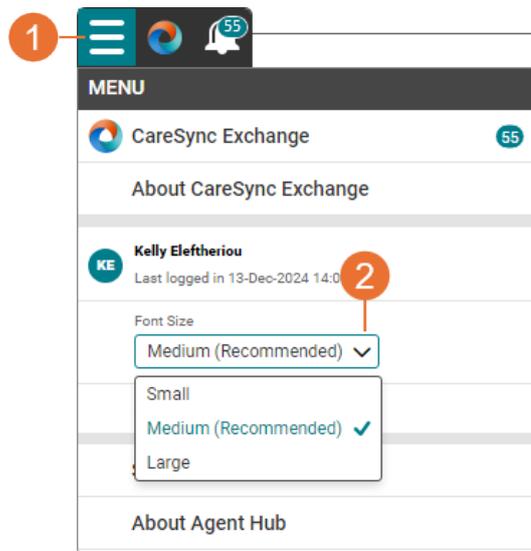


For detailed instruction on Notifications please refer to **the Identifying New Patient Information – Notification and Badges** quick Reference Guide.

How to change the font size

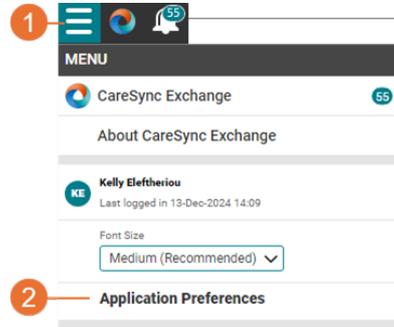
- 1 Select Menu (hamburger icon).
- 2 Note the default (recommended) font size used within CareSync Exchange is Medium.

If required adjust the font size to small or large.

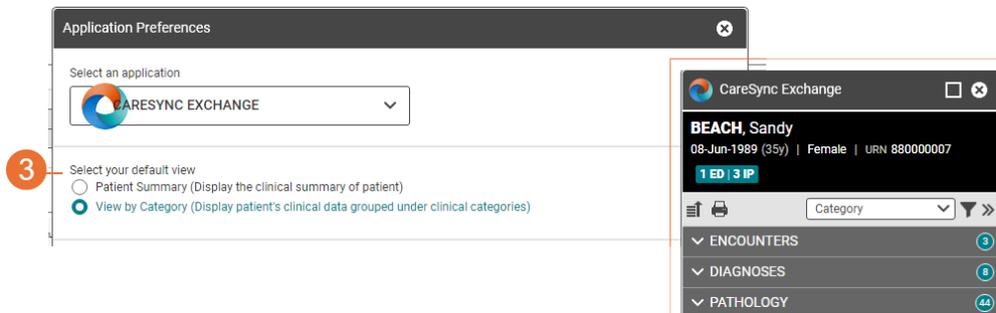


Personalising your view

- 1 Select Menu (hamburger icon).
- 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.

- 3 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.

