

Editing Basic Patient Information through OnPatient

07/08/2024 7:36 pm EDT

Allow your patients to submit their information before they even reach the office. They'll need to set up an OnPatient account which you can learn more about [here](#).

1. Once you have an OnPatient account, log in and go to **Appointments**. The patient will need to have an appointment scheduled to edit their basic demographic information. If they have an appointment set up click **Check In**.

The screenshot shows the OnPatient web interface. At the top left is the OnPatient logo. A navigation menu includes 'Appointments' (highlighted with a blue box), 'Doctors', 'Billing', 'Messages', 'Documents', and 'Health Profile'. The user 'Jenny Harris' is logged in. The main heading is 'Appointments', with buttons for 'Book Video Visit' and 'Book Appointment'. Below this is a section for 'UPCOMING APPOINTMENT' featuring a patient card for James Smith with a 'Check in' button. A blue arrow points to this button.

2. This will direct the patient to their demographic information along with Additional Information and Reason for Visit that is specific to your OnPatient forms.

Note: Data that is input through the Additional Information, Reasons for Visit, Medications, Allergies, Conditions, or Questions & Comments sections will populate in the clinical note. All other information will populate the patient's chart.

Onboarding forms

Patient Photo



Choose a file:

No file chosen

Name & Gender

First Name	Middle Name	Last Name	Suffix
<input type="text" value="Jenny"/>	<input type="text"/>	<input type="text" value="Harris"/>	<input type="text"/>
Gender	Nickname		
<input type="text" value="Female"/>	<input type="text" value="Jen"/>		

Address

Street Address	State	Zip Code
<input type="text" value="1001 N Rengstorff Ave"/>	<input type="text" value="California"/>	<input type="text" value="94040"/>
City		
<input type="text" value="Mountain View"/>		

3. As the patient completes the check-in process, they can make changes to their demographic information, for example, updating their address or contact information.

4. If needed, the patient will need to sign any consent forms and click **I'm done**. After clicking **I'm done**, the information the patient entered will be saved.

Consent & Signature

2 unread consent forms		
<input type="checkbox"/>	No Show Policy	Required
<input type="checkbox"/>	HIPAA Data Use Agreement	Required

I'm done