

Patient Demographics

07/08/2024 7:36 pm EDT

A lot of important patient information can be found on the patient demographic page.

To get to the patient chart quickly, use the hotspot search. It's located in the top right corner of the website, no matter what page you're on. It will take you directly to the patient's chart.

Reports Billing Account Marketplace Help

+ Event Today Refresh Print Appts

Apr 4 2022

Daily

Laurie

DR. JAMES SMITH

Laurie Sample 12/08/1990

Mon 4/4

10:00am

10:00 - 10:30 am
Sample Patient: Office 1

10:40 - 11:10 am
Laurie Sample: Office 1

11:00am

11:20 - 11:50 am
Jennifer (Demo) Harris: Office 1

You can also find a patient by navigating to **Patients > Patient List**.

Patients Reports

PATIENT

Patient List

Consent Forms

Patient Flags

Patient Groups

Send Email

Send Referral

Once there, you can search for a particular patient or select the patient from the list.

DOFR000001	Doctor Doctor	Doe	Frank	(301) 555-5555	Thu, 08/09/2018
DOFR000002	Doctor Doctor	Dough	Frank	(443) 555-5555	
DOJA000001	Doctor Doctor	Doe	Jane	(240) 555-5555	Fri, 01/10/2020
DOJA000002	Doctor Doctor	Dough	Jane	301-555-5555	Fri, 07/27/2018

You can also use the **More Filters** option on the right of the screen to add additional search options such as including inactive patients, patients with incomplete billing information, etc.

Manage your existing patients ?

Bulk Import QRDA 1 Import Export (CSV) Export (C-CDA XML)

Patient search... Search

More Filters

Manage your existing patients ?

[Bulk Import](#) [QRDA I Import](#) [Export \(CSV\)](#) [Export \(C-CDA XML\)](#)

Patient search...

- Possible duplicate patients
- Patients with follow-up appointment dates set
- Patients with incomplete billing information
- Patients who unsubscribed email
- Inactive patients include
- Inactive patients only

Once you have selected your patient, you can reach their demographics page by selecting the option on the right of your screen.

Jenny (Jen) Harris (Female | 40 years old | Feb. 11, 1980)

Phone: (844) 569-8628 Email: Missing Date Added: Nov. 3, 2020
Address: 1001 N Rengstorff Ave Last Scheduled Appt: Wed Jan 13, 2021
Mountain View, CA 94040 Next Scheduled Appt:
CDS: [Adult Immunization Schedule Age: 27-49](#)

onpatient access enabled
Primary Provider: James Smith

Demographics | Insurances | Authorizations | Smoking Status | Flags | Balance | onpatient Payments

Sufficient patient demographics to bill insurance. Needs Authorization: Needs prior auth for procedure on 1/31.

Demographics

Patient SSN	<input type="text" value="111-11-1111"/>	
Patient Date of birth	<input type="text" value="02/11/1980"/>	e.g. 8/8/1979
Approx Age (if DOB unknown)	<input type="text"/>	
Sex	<input type="text" value="Female"/>	
Gender Identity	<input type="text" value="Unknown"/>	
Sexual Orientation	<input type="text" value="Unknown"/>	
Race	<input type="text" value="White"/>	
Ethnicity	<input type="text" value="Not Hispanic or Latino"/>	
Preferred Language	<input type="text" value="English"/>	
Patient Student Status	<input type="text" value="Not a Student"/>	For patients that are 19 years or older and not handicapped
Country	<input type="text" value="UNITED STATES"/>	
Street Address	<input type="text" value="1001 N Rengstorff Ave"/>	

Once you're on the patient chart, you can do many different things. For example, if you have your patients fill out their demographic information through OnPatient or the DrChrono Check-In App, you can find that information in the Demographics tab.

You can also manually add the information, or make changes. So if the patient has an updated email, phone number, address, etc., you can change that under the demographics tab below. You can also document things such as insurance authorizations and adding patient flags.

FAQ

- How can I edit or change my patient's email?

Click on the Demographics tab on the left side menu and then the Important tab in the middle of the page, and you'll be able to access the patient's email information. You can change the email here. Make sure to scroll to the bottom of the page once you're finished and click the blue **Save Demographics** button to save any changes.

- What format are phone numbers recorded in?

Phone numbers can be entered in many formats: XXX-XXX-XXXX, XXXXXXXXXXX, (XXX)-XXX-XXXX.

Home Phone

Cell Phone [Required for SMS/Text. Click here to verify cell phone for US patient](#)

Disable SMS/Txt Disable all SMS/Txt messages for this user.

Office Phone Office Ext.:

Email Allow Duplicate Email

Alternate Email

Preferred Communication

Reminder Language For email reminders only

Decline Clinical Summary Patient declines to receive Clinical Summary

Medication History Consent Patient has given consent to obtain medication history.

Payment Profile Affects default procedure prices

Patient's Copay \$

Default Appointment Profile

Follow-up Date Patient will get reminders around this date to make an appointment.

Follow-up Reason e.g. 2 week follow-up

Last Appointment

[Save Demographics](#)