

Patient Search

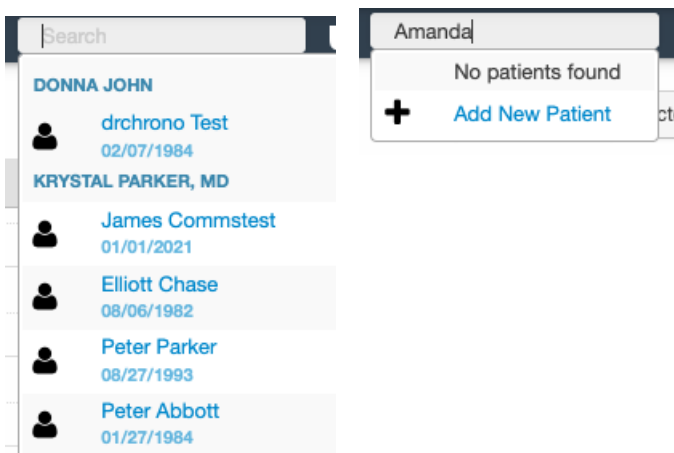
Last modified on 03/27/2025 3:00 pm EDT

Web

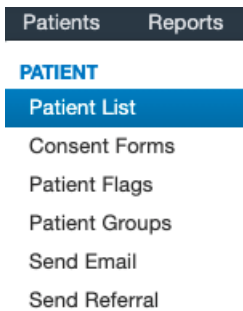
To quickly access a patient's chart, use the hotspot search located in the top right corner of the website, regardless of which page you are on. It will take you directly to the patient's chart.

The search option displays the last 5 patient charts accessed within a single day. The recent searches reset every 24 hours, and the list will remain blank until the user begins searching for patient charts on that day.

If no patient results are found, an "Add New Patient" hyperlink will display. Clicking it will direct the user to a screen to create a new patient chart.



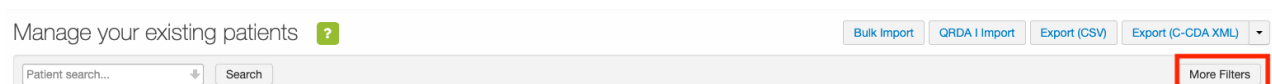
You can also find a patient by navigating to **Patients > Patient List**.



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
						Fri, 08/31/2018

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.



Patient search... Hide Filters

- 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

From the Patient Chart

Once you have selected your patient, you can click sections from the menu or patient header to manually add, edit and/or view patient information whether entered by the provider or the patient via OnPatient or the DrChrono Check-In App.

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	<input type="text" value="6504444444"/>	
Cell Phone	<input type="text" value="650-444-4444"/>	<small>Required for SMS/Text. Click here to verify cell phone for US patient</small>
Disable SMS/Text	<input type="checkbox"/> Disable all SMS/Text messages for this user.	
Office Phone	<input type="text" value="(650) 333-3333"/>	Office Ext.: <input type="text"/>
Email	<input type="text" value="sample@sample.com"/>	<input type="checkbox"/> Allow Duplicate Email
Alternate Email	<input type="text"/>	
Preferred Communication	<input type="text"/>	
Reminder Language	<input type="text" value="English"/>	<small>For email reminders only</small>
Decline Clinical Summary	<input type="checkbox"/> Patient declines to receive Clinical Summary	
Medication History Consent	<input type="text"/>	<small>Patient has given consent to obtain medication history.</small>
Payment Profile	<input type="text" value="Insurance"/>	<small>Affects default procedure prices</small>
Patient's Copay \$	<input type="text"/>	
Default Appointment Profile	<input type="text" value="-----"/>	
Follow-up Date	<input type="text"/>	<small>Patient will get reminders around this date to make an appointment.</small>
Follow-up Reason	<input type="text"/> <small>e.g. 2 week follow-up</small>	
Last Appointment	<input type="text" value="04/24/2019"/>	

Mobile

To quickly access a patient's chart, tap the  located in the top right corner of the page and type their name.

The search option displays the last 5 patient charts accessed within a single day. The recent searches reset every 24 hours, and the list will remain blank until the user begins searching for patient charts on that day.

If no patient results are found, click the "+" icon to create a new patient.

From the Patient Chart

Tap the patient name to display the dropdown menu

Tap any section under the Patient column to manual add, edit and/or edit view demographic information.

Patient	Actions
Patient Information	Send eRx
Patient History	Log Phone Call
Face Sheet	Check Insurance Eligibility
Timeline	Take Clinical Photo
Problems 0	Upload Files
Medications 0	Send Referral
Allergies 0	Data Visualization
Labs	Patient Education
Vitals	App Directory
Patient Flags	Quick Charting
Appointment List	Apple Health App Data NO
Family History	
Growth Charts	
Patient Tasks 0	
Communication History	