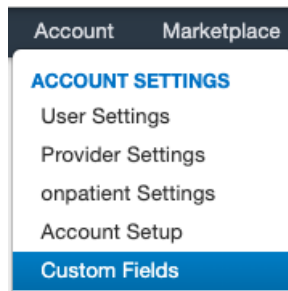


# Creating Custom Patient Demographics

Last modified on 04/08/2025 4:00 pm EDT

Some specialties need to collect information that goes beyond the basics of everyday practice. Custom Patient Demographics allow our users to create additional demographic fields to meet the needs of the practice. You can also run reports on custom demographics. To learn more, see our article [here](#).

1. Go to Account > Custom Fields.



2. Select Patient Demographics on the left menu. This will bring up a list of all your current custom patient demographics. Click +Add New Field to create a new demographic field.

3. Enter a name and description of the demographic you would like to create.

- The description could serve as instructions or a description of the field.
- If you would like to pull information from this field into your clinical forms through the form builder, enter a Form Name in the field.
- Select a Field Type.
- If you would like to display this during Check-In through OnPatient or the iPad App, check the Show on OnPatient & DrChrono Check-In checkbox.
- You can also make the field mandatory on OnPatient and Check-In by checking the Required on OnPatient & DrChrono Check-In.

## Edit Custom Patient Demographics



Name	<input type="text" value="Attorney Name"/>
Description	<input type="text" value="Please provide your attorney's first and last name."/>
Form Name	<input type="text" value="AttorneyName"/>
Field Type	<input type="text" value="Text Field"/>
Show on onpatient & DrChrono Check-In	<input checked="" type="checkbox"/>
Required on onpatient & DrChrono Check-In	<input type="checkbox"/>

## Field Types

Field Type	<input checked="" type="checkbox"/> Text Field <input type="checkbox"/> Text Area <input checked="" type="checkbox"/> Selection <input type="checkbox"/> Multiple select
Show on onpatient & DrChrono Check-In	

**Text Fields** are short fields (

What is your preferred pharmacy

) to enter text information with a 30-character limit.

**Text Areas** are larger fields (

Employer  Employer info

)to enter text information with no character limit.

**Selection** fields allow you to create a menu where one option can be selected from the list.

Have you seen a therapist before

☒ Yes  
☐ No

**Multiple Select** allows you to create a list where more than one option can be selected from the list.

Past Surgical Information

4. Once you have set up the custom demographic, click Save.

### Edit Custom Patient Demographics

Name	<input type="text" value="Attorney Name"/>
Description	<input type="text" value="Please provide your attorney's first and last name."/>
Form Name	<input type="text" value="AttorneyName"/>
Field Type	<input type="text" value="Text Field"/>
Show on onpatient & DrChrono Check-In	<input checked="" type="checkbox"/>
Required on onpatient & DrChrono Check-In	<input type="checkbox"/>

5. You can access the Custom Demographics from the patient's chart under the Demographics tab. Scroll down to Custom Demographics. Click on the Manage Custom Patient Demographics to access the Manage Custom Patient Demographics page.

+ Add new patient

Demographics

Appointments

Clinical Dashboard

Documents

Tasks 2

Problem List 13

Medication List 7

Send eRx

Allergy List 4

Drug Interactions

Jenny (Jen) Harris (Female)

Phone: (650) 215-6343

Email

Address: 328 Gibraltar Ave

Sunnyvale, CA 94040

CDS: Adult Immunization Sched

onpatient access enabled

Primary Provider: Brendan Wilberton

New Referral

Fax Demographics

Print Demographics

Important

Demographics

Insurances

Eligibility

Authorizations

Sufficient patient demographics to bill insurance.

Demographics

Custom Demographics

Manage Custom Patient Demographics

What is your preferred pharmacy

DL Number

Employer

Driver's License

Employer info

6. You can pull up this demographic information in your templates by filling out the **Form Name** section. This will allow you to pull up the demographics easily when creating your forms.

Edit Field

Label Name

Custom Demos Example

Try to keep it short!

Wide field

Required field

Spacing within note

New Line

New Paragraph

Smart Field

Default value

OFF

Generated text

Edit

Preview

Value

Patient

Date

Date & Time

Field Date

Field Date & Time

Header

Subheader

Bold

Italic

Underline

x<sub>2</sub>

x<sup>2</sup>

Pt Demogr

Service

Date & Time

System Vitals

Custom Vitals

Custom Pt Demogr

{{cpd\_PastSurgicalInfo}}

What is your preferred pharmac

Employer

DL Number

Attorney Name

Past Surgical Information

Billing Profile

(None)

Clinical codes

Code System	Code	Description

+ Add New

Cancel

Update field