

Creating Custom Patient Demographics

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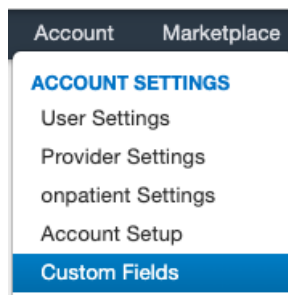
Some specialties need to collect information that goes beyond the basics of everyday practice. Custom Patient Demographics allow our users to create additional demographic fields to meet the needs of the practice. You can also [run reports](#) on custom demographics if needed.



Click this [link](#) for a demonstration video with step by step instructions.

Creating a custom patient demographic

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 (top right corner) 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 clinical form management, 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
Show on onpatient & DrChrono Check-In	<input checked="" type="checkbox"/> Selection
	<input type="checkbox"/> Multiple select

- Text Fields are short fields to enter text information with a 30-character limit.
- Text Areas are larger fields to enter text information with no character limit.
- Single Select fields allow you to create a menu where one option can be selected from the list.
- Multiple Select allows you to create a list where more than one option can be selected from the list.

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

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.

Using a custom patient demographic in a form

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.

- Navigate to Clinical > Clinical Form Management
- Edit or create a new form.
- Add or open a free text field.
- Click Customized Note > Patient Info.
- Select custom to insert your custom demographic.

General

Customized Note

Billing Code Attachment

Variable

Generated text

Value

Patient Info

Basic >

Contact >

Medical >

Pronoun >

Custom >

History of Present Illness: {{value}}

Family History

Leave voicemail at work

Person responsible for account

Insurance

Payment Profile

Adjuster Name

Insurance Claim #

Referral Source