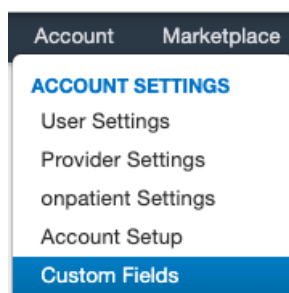


Creating Custom Patient Demographics

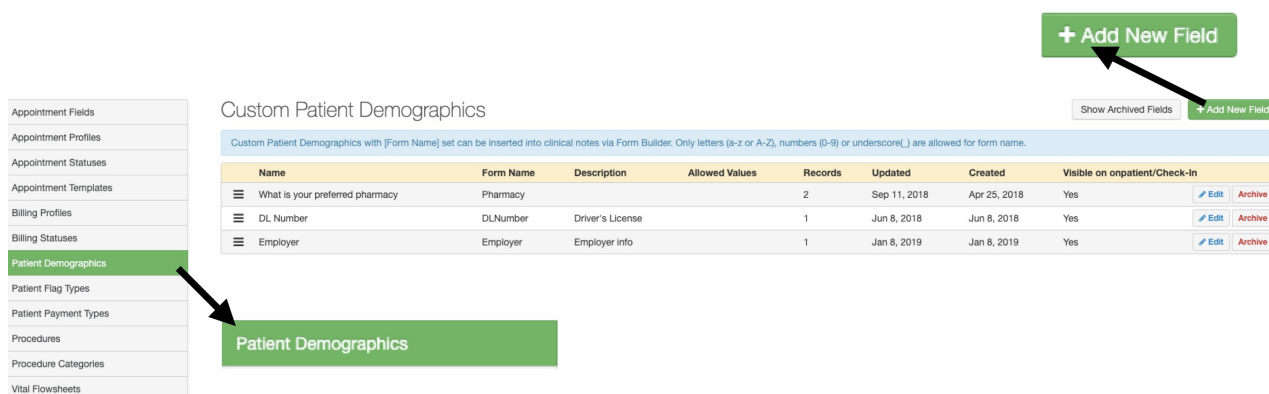
07/08/2024 7:58 pm EDT

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

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

- none
- AP
- Angioplasty
- Tonsillectomy
- Laparotomy

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.

The screenshot shows a patient chart for Jenny (Jen) Harris. On the left is a navigation menu with 'Demographics' highlighted. The main content area shows patient information, a primary provider (Brendan Wilberton), and a 'Demographics' tab highlighted with a black box. Below the tab is a green notification: 'Sufficient patient demographics to bill insurance.' Underneath, the 'Custom Demographics' section is visible, with 'Manage Custom Patient Demographics' highlighted by a black box. An arrow points from this link to a form with fields for 'What is your preferred pharmacy', 'DL Number', and 'Employer'.

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 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 x₂ x²

{{cpd_PastSurgicalInfo}}

- What is your preferred pharmac
- Employer**
- DL Number
- Attorney Name
- Past Surgical Information

Billing Profile

Clinical codes

Code System	Code	Description	
			<input type="text"/>