

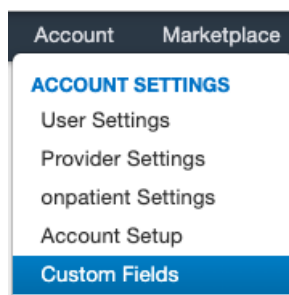
# Creating Custom Patient Demographics

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Creating a custom demographic enables us to identify and target specific groups based on unique attributes that standard demographic categories may not capture. This tailored approach enhances our understanding of key populations and allows for more precise analysis. Additionally, custom demographics can be used to generate detailed reports as needed.

## 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

Attorney Name

Description

Please provide your attorney's first and last name.

Form Name

AttorneyName

Field Type

Text Field

Show on onpatient & DrChrono Check-In

☒

Required on onpatient & DrChrono Check-In

☐

Cancel

Save

## Field Types

Field Type

- ✓ Text Field
- Text Area
- Selection**
- Multiple select

Show on onpatient & DrChrono Check-In

- 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.

Edit Text Field ×

General **Customized Note** Billing Code Attachment

Variable

Value

Patient Info

Generated text

History of Present Illness: {{value}}

Basic >

Contact >

Medical >

Pronoun >

Custom >

Family History

Leave voicemail at work

Person responsible for account

Insurance

Payment Profile

Adjuster Name

Insurance Claim #

Referral Source



Learn more about [Reporting on Custom Demographics](#)