Patient Header

Last modified on 12/04/2024 1:09 pm EST

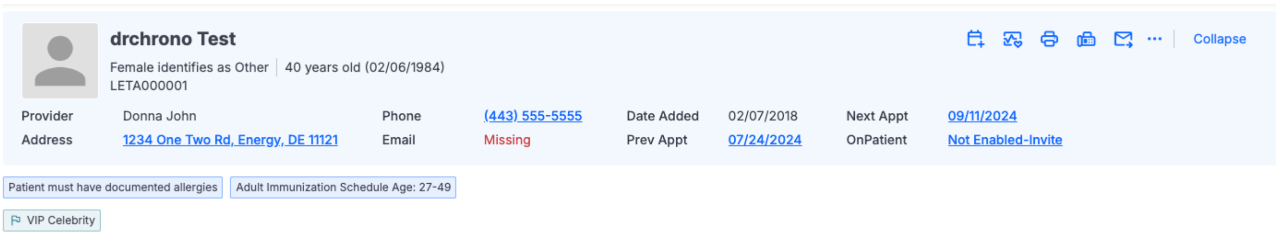
The Patient Header is designed to enhance the user experience by providing quick access to essential patient details. It consolidates critical information, allowing healthcare professionals to easily view and manage patient data without navigating multiple screens. This streamlined approach not only improves efficiency but also ensures that clinicians have the necessary information at their fingertips.

This article will cover

- **Overview of patient header**
- **Permission and patient chart settings**
- **Customizing the patient header**

Overview of patient header

Updated patient header



The patient header consists of four sections. Click on each item below for a detailed description.

1. Patient Information
2. Key Demographics
3. Action Items
4. Alerts

Patient Information Section

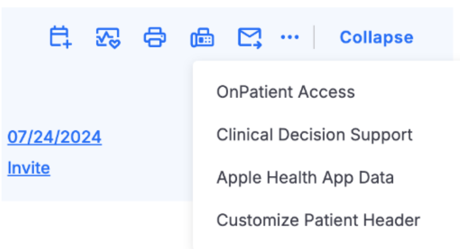
- patient name - displays as first name, middle name/initial, last name, nickname. Users also have the option to copy the patient's name to the clipboard by hovering over their name and clicking the icon to copy the name.
- sex and gender identity- if a patient's sex and gender identity are different, both will display.
- date of birth

- chart identification number- the chart ID consists of four letters followed by six digits.

Key Demographics Section

- provider - primary provider listed in the chart
- phone number
- physical address
- email address
- date added - the date that the patient chart was created
- previous appointment date -clicking the date will take you to the appointment screen
- next appointment date- clicking the date will take you to the appointment screen
- balance - balance information
- eligibility - patient insurance and benefit status
- referred by - the name of the provider that preferred patient
- primary insurance
- secondary insurance
- smoking status - yes or no
- language - patient's preferred language, can also note other language
- race
- ethnicity
- onpatient status - displays "enabled" or "not enabled-invite". Clicking the hyperlink will display an onpatient access pop-up window to view the access history or enable patient access (button) to send an invitation. Learn more about OnPatient Basics.

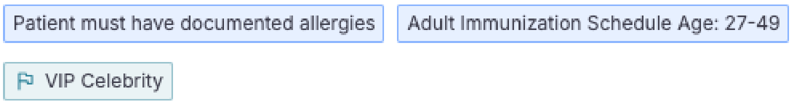
Action Items Section



- schedule appointment - will take you to the new appointment screen
- vitals - pop-up window will appear to view and/or record vitals
- print demographics - option to print demographics
- fax demographics - option to fax demographics
- send referral - will take you to the message center section to send a referral
- more actions - the ellipsis symbol will display a drop-down for additional actions

- onpatient access - can view access history or enable invite
- clinical decision support - will take you to the screen to view active and resolved CDS rules for the patient or set up CDS rules. Learn more about Clinical Decision Support (CDS) Rules.
- apple health app data - view collected health data from the apple health app integration
- customize patient header - select the patient information you would like to display in the patient header. Learn more about How to Customize the Patient Chart Header

Alerts Section

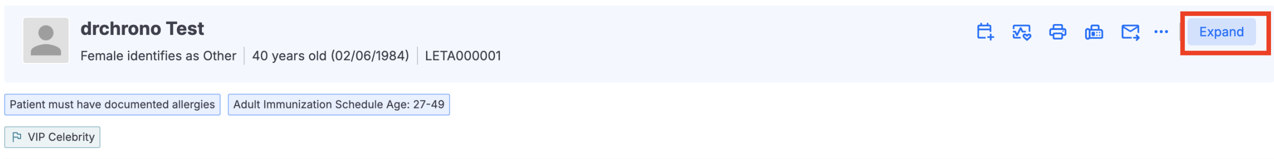


- patient flags - display custom flags created by the practice
- CDS alerts -display active clinical decision support rules for the patient

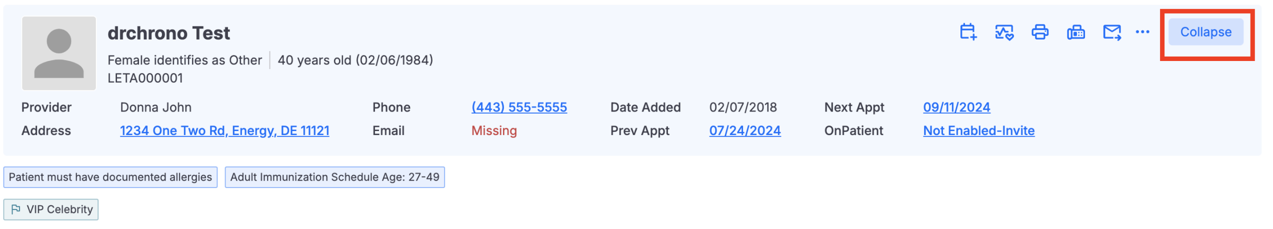
Key Functions of the Patient Header

- Remains persistent, allowing users to scroll up and down the chart without losing visibility.
- Automatically collapses, hiding the key demographic section when scrolling up and down the chart.
- Provides the ability to manually collapse and expand.

Collapsed View



Expanded View



Permission and Patient Chart Settings

Permission and Patient Chart Settings

- When adjusting permissions and chart settings, the system follows a hierarchical order notated below.
    - The system initially looks for any user-level setting to display. If there is no user setting...
    - The system will then look for any role-level settings to display. If there is no role-level setting...
    - The system will then look for any practice-level setting. If there is no practice

level setting...
- The system will display the DrChrono default settings.

Please note, that if any users within your practice are assigned to a “custom” role, this may impact your ability to leverage this new functionality. See below for more information.

- When any permissions are adjusted at the user level, the user's role will automatically switch to "custom" upon saving (Account > Staff Permissions > Providers or Staff tab). To revert to a standard public role, the user must select an option from the drop-down menu for role types and then save the changes. It is best practice and recommended to create a new role through the Roles tab from the Permissions Administration screen to customize permissions and assign staff members (as a group) to a specific role, to prevent possible workflow disruptions.

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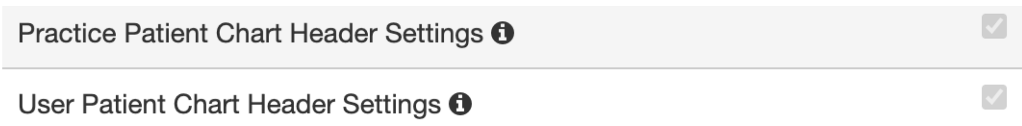
Permission Settings

To view the updated patient chart header, users can enable the permission at either the administrative or user level by going to Account > Staff Permissions.

- Practice Patient Chart Header Settings - allow the user to customize the patient chart header settings for the practice at the administrative level.
- User Patient Chart Header Settings - allow the user to customize the patient chart header settings at the user.



Patient Chart Settings

After enabling the permission settings, users can view and adjust the patient header and the patient chart side navigation settings by going to Account Settings > Patient Chart Settings.

Patient Header

Default Settings

System defaults - view which settings are enabled, hidden, and disabled.

Practice defaults - view and edit what patient information appears in the patient header at the practice level.

User Role Settings

Add or remove what patient information appears in the patient header at the user level.

Editing Practice Default Settings

1. Click edit under the action column to navigate to the patient information screen

2. Select up to 10 patient information to display in the patient header.

3. Press the (+) or (−) to add and remove menu items.

4. Drag and drop to reorder the menu list.

5. Cancel, Restore System Default, or Save Settings.

Editing User Roles Settings

1. .Click + Role Settings to navigate to the patient information screen.

2. Select a role to add settings.

3. Select up to 10 patient information to display in the patient header.

4. Press the (+) or (−) to add and remove menu items.

5. Drag and drop to reorder the menu list.

6. Cancel, Restore System Default, or Save Settings.

Other Settings

- Display Patient Photo - enable to display patient photo in the patient header.
- Display Chart ID - enable to display chart ID in the patient header.
- Display CDS Flags - enable to display CDS flags in the patient header.
- Collapsed Patient Header by Default - enable to display collapsed patient header by default

Press play to preview the demonstration video.

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Customize patient header

Click the help center article to learn How to Customize the Patient Chart Header.

Related Help Center Articles

Patient Chart Sidebar Navigation	Patient Chart Summary