Patient Chart Header

Last modified on 11/13/2026 9:28 am EST

> Select this link to watch a video with step-by-step instructions.

The **Patient Header** enhances your user experience by providing quick access to essential patient chart details. It consolidates critical information so healthcare professionals can view and manage patient data without opening multiple screens. This streamlined approach improves efficiency and ensures that clinicians have the necessary information at their fingertips.

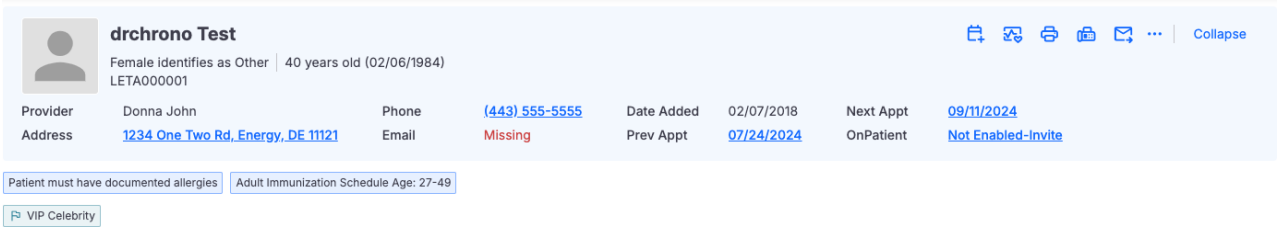
The **Patient Header** remains persistent, so you can scroll up and down the chart without losing visibility.

Learn about patient chart permissions and how to customize the Patient Header.

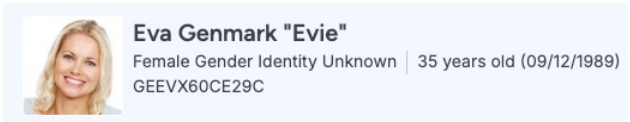
Patient Header overview

The **Patient Header** consists of four sections:

- Patient information
- Demographics
- Action items
- Alerts



Patient information



The patient information section contains the following by default:

- Patient's photo
- Patient's name: First name, middle name or initial, last name, and nickname. To copy the patient's name to the clipboard, hover over their name and then select **Copy name** .
- Sex and gender identity: If the patient's sex and gender identity differ, both appear.
- Age and date of birth
- Chart ID: Consists of the first two letters of last name + first two letters of first name + 8 random alphanumeric characters. The format of older charts is the first two letters of last name + first two letters of first name + six numbers.

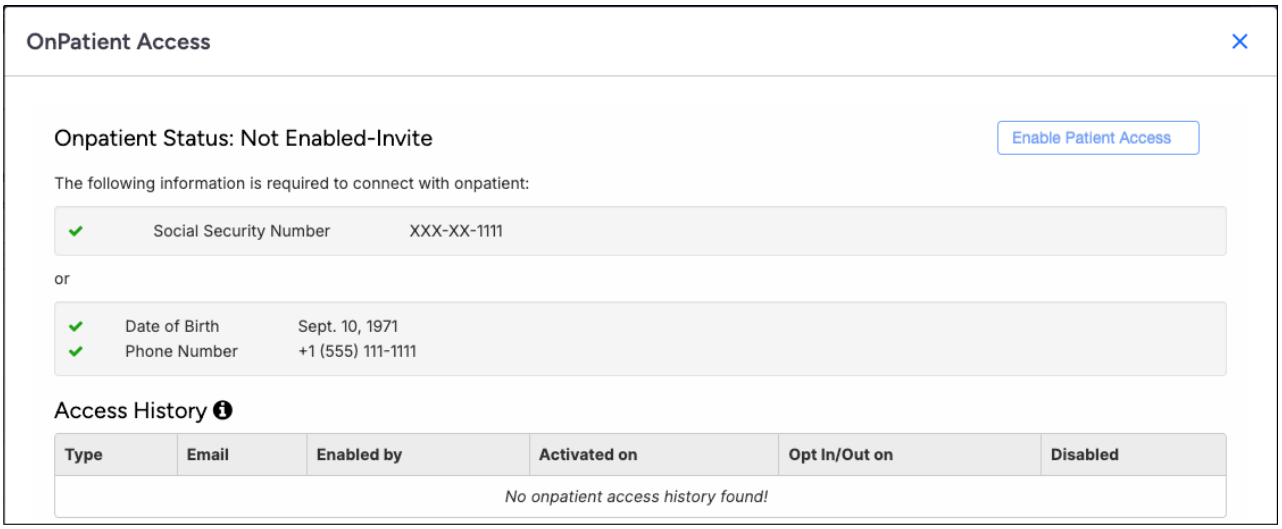
Demographics



Default information

The demographics section contains the following by default:

- Provider: Primary provider listed in the chart
- Physical address
- Phone number
- Email address
- OnPatient status: Shows as **Enabled** or **Not Enabled-Invite**. Select the hyperlink to open the **OnPatient Access** window, where you can view the access history or turn on patient access by selecting **Enable Patient Access** to send an invitation. For more information, refer to OnPatient Basics.
- Date added: The date that the patient chart was created
- Previous appointment date: Select the date to open the appointment screen
- Next appointment date: Select the date to open the appointment screen



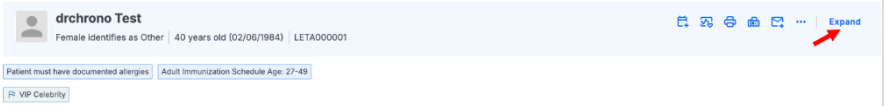
Additional information

Customize the **Patient Header** to add the following information:

- Referred by: The name of the provider that referred the patient
- Primary insurance
- Secondary insurance
- Language: Patient's preferred language (can also note other language)
- Race
- Preferred pharmacy: Patient's default preferred pharmacy. For more information, refer to Add Patient Preferred Pharmacies in DrChrono.
- Ethnicity
- Smoking Status: Yes or no
- Eligibility: Patient's insurance and benefit status
- Patient Balance: Patient's balance information

Action items

Icon/Button	Description
Schedule appointment	Opens the **New Appointment** page

Icon/Button	Description
Vitals	Opens the Vitals window to view and/or record vitals
Print demographics	Option to print demographics
Fax demographics	Option to fax demographics
Send referral	Opens the **Message Center** to create a new referral
More actions (three dots)	Select **More actions** ••• to open the dropdown for additional actions. See the image below.
OnPatient Access	View the access history or turn on patient access by selecting**Enable Patient Access** to send an invitation. For more information, refer to OnPatient Basics.
Decision Support Intervention	Opens the **Decision Support Intervention** side panel to view active and resolved DSI rules for the patient or set up DSI rules. Learn more about Decision Support Intervention (DSI) Rules.
RecordSync	Opens the RecordSync & Consent side panel. Learn more about RecordSync.
Customize Patient Header	Customize the **Patient Header** to select the patient information shown in the **Patient Header**.
Collapse/Expand	Select **Collapse** or **Expand** to manually collapse or expand the header (the demographics section is hidden or shown) or customize the **Patient Header** to have it collapsed by default. 

Alerts

The alerts section contains the following alerts by default:

- DSI alerts - Active Decision Support Intervention rules for the patient
- Patient flag alerts - Custom patient flags created by the practice
- Ability to see the count with a clickable option to expand and view all
    - Patient flag - Select the "+" icon to add a new patient flag
    - Decision Support Intervention - Select **View All** to setup a new DSI rule

