

Improved Patient Demographics

Last modified on 06/26/2025 2:08 pm EDT



This feature is currently in beta. To become a beta partner, add a comment to the corresponding [DrChrono roadmap portal card](#).

DrChrono has significantly enhanced the Patient Demographics experience, boosting user efficiency and data accuracy. With reduced clicks, optimized screen space, and visual improvements, the workflow becomes faster and more intuitive for providers and front office staff.


The **Demographics** page consists of five tabs:

- [Demographics](#)
- [Insurances](#)
- [Authorizations](#)
- [Patient Flags](#)
- [Payments](#)

This article explores the Demographics tab, click the links above to learn more about the additional tabs.



Select [this link](#) to watch a video with step-by-step instructions



Christina A. Johnson Jr. "Tina"

Sex Unknown identifies as Trans Woman | 11 mo 3 wo (12/01/2014)

BRCH000001

Provider

Alice Bruce, MD

Address

123 Sesame Street, Los Angeles, CA 12345

Phone

(123) 456-7890

Email

christina.johnson@gmail.com

OnPatient

[Invite](#)

Date Added

12/12/2020

Prev Appt

08/14/2023

Next Appt

None

CDS Flag

CDS Flag

CDS Flag

CDS Flag

CDS Flag

Patient Flag

Patient Flag

Patient Flag

Patient Flag

Patient Flag

Patient Chart

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Demographics

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Patient List / Christina Johnson /

Demographics

Print

Fax

Demographics


Insurances

Authorizations

Patient Flags

Payments

Patient Profile



Christina Ann Johnson Jr.

Active

Preferred Name

Tina

Suffix

Jr.

Title

Ms.

Ethnicity

Not Hispanic or Latino

Race

Asian

Race Subcategory

American Indian - Abenaki

Gender Identity

Female

Sexual Orientation

Lesbian / Gay

Patient SSN

111-11-1111

Preferred Language

English

Marital Status

None

Student Status

None

Primary Provider

Alice Bruce

Date of Birth / Approx. Age

12/12/1995

Sex

Female

Previous Names

Christina A. Bruce Jr.

01/01/1990 - 01/01/2021

View 5 More

Smoking Status

Current some day smoker

Start Date: 12/21/2024 | Date Recorded: 12/21/2024

Current some day smoker

Start Date: 12/21/2024 | Date Recorded: 12/21/2024

Current some day smoker

Start Date: 12/21/2024 | Date Recorded: 12/21/2024

View 5 More

Preferred Pharmacies

CVS Pharmacy #1234

Retail

Long Term Care

123 456 ST SW, Los Angeles, CA 12345

(123) 456-7890

CVS Pharmacy #1234

Retail

Long Term Care

123 456 ST SW, Los Angeles, CA 12345

(123) 456-7890

CVS Pharmacy #1234

Retail

Long Term Care

123 456 ST SW, Los Angeles, CA 12345

(123) 456-7890

View 5 More

Patient Profile

Patient Info

Term	Definition
Edit Button	Ability to modify and save changes to field.
Profile Picture	Picture of patient.
Status	Choose is patient is actively being seen by provider, inactive or deceased.
Primary Provider	Primary provider listed in the chart.
Date of birth/ Approximate Age	Choose which age format to display.
Sex	The biological characteristics, male or female.
Preferred Name	The name a person chooses to be called, different from their legal or given name.
Suffix	Examples such as, Sr. , Jr. , etc.
Title	Examples such as, Dr. , Mr. , Mrs. , etc.

Ethnicity	Social/cultural background (ie: Hispanic or Latino, Not Hispanic or Latino).
Race	Physical/social characteristics (ie: American Indian, Asian, African American, etc).
Race Subcategory	A more specific classification within a broader racial category (ie: Chinese, Indian, Japanese, etc.).
Gender Identity	A person's internal sense of their gender, which may be different from the sex assigned at birth.
Sexual Orientation	A person's sense of identity based on attractions to different or same sex (ie: heterosexual, lesbian, gay, bisexual, unknown, other, or choose not to disclose).
Patient SSN	The patient's social security number.
Preferred Language	The language most preferred to use for communication.
Marital Status	The state of being married or not married.
Student Status	For students aged 19 or older who do not have a disability.

Previous Names/Smoking Status

Term	Definition
Add Record Button	Add a new previous name or smoking status > click "Cancel" , "Save & Add Another" or "Add Record" when finished.
Pencil /Trashcan Icon	Edit or delete a record.
Previous Name	Any name the patient may have used in the past, which is different from their current name.
Smoking Status	Information about whether the patient currently smokes, has smoked in the past, or has never smoked

Preferred Pharmacies

Term	Definition
Add Pharmacy Button	Use search options and filter to add a new pharmacy
Star and Trashcan Icon	Set pharmacy as a default click "Cancel" , "Save & Add Another" or "Add Record" when finished or Delete pharmacy.
Preferred Pharmacies	The specific pharmacy or pharmacies that the patient chooses to use for filling their prescriptions.
Learn more about adding patient preferred pharmacies	Add Patient Preferred Pharmacies in DrChrono

Patient Contact/ Contact Info

Contact Info Fields

- To modify fields, click the [Edit](#) button, make your updates, and then click "Cancel" or "Save Contact Info" when finished.

Cell Phone	Home Phone	Office Phone
Email	Alternate email	Home Address
Mail Address (if different from home address)	Preferred Contact Method - preferred confidential communication method (ie: cell phone, email, text, etc.).	Email
Email Reminder Language	Time Zone (patient's preferred timezone)	Contact Setting (option to disable all SMS text messages)
Emergency Contact Name	Emergency Contact Phone	Emergency Contact Relationship

Previous Address

Add Record Button	Add a previous address, > click "Cancel" , "Save & Add Another" or "Add Record" when finished.
Pencil and Trashcan Icon	Edit or Delete
Learn more about adding a patient's previous name and address	Adding a Patient's Previous Name and Address to the Chart.

Employer

Edit Button	Ability to modify and save changes to field, then click "Cancel" , "Save Employer" or "Save Responsible Parties" when finished.
Employer	A person, company, organization, or government entity that hires one or more individuals (employees) to perform work or services in exchange for compensation, typically in the form of wages or a salary.
Responsible Parties	An individual or entity legally or ethically accountable for something.

Provider Information

Term	Definition
Edit Button	Ability to modify and save changes to field, then click "Cancel" , "Save Referring Provider" or "Save Ordering Provider " when finished.
Referring Provider	The name of the provider that referred the patient
Ordering Provider	The provider that authorizes or requests a specific test, procedure, or treatment for a patient.

Medical Management & Notes

Term	Definition
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Edit Button	Ability to modify and save changes to field, then click "Cancel" or "Save " when finished.
Follow-up Date	Patient will receive reminders on this date to make an appointment.
Follow-up Reason	Reason for follow-up visit.
Default Appointment Profile	Fields will auto-populate in appointment screen based on default profile.
Consent Signature	Confirms if consent form electronic signature was captured via OnPatient check-in.
EPSDT Service	Early and Periodic Screening, Diagnostic, and Treatment Service is a Medicaid program that provides comprehensive health services for children under the age of 21.
EPSDT Referral Condition:	A specific health issue or concern identified during an EPSDT (Early and Periodic Screening, Diagnostic, and Treatment) screening that requires a referral to a specialist or additional diagnostic services for further evaluation or treatment.
Payment Profile	The stored collection of payment-related information and preferences associated with a specific patient, guarantor, or insurance provider. Changes to the payment profile will affect default procedure prices.
Patient Copay	The amount a patient pays for a healthcare service or prescription, typically at the time of the visit, with the remaining balance covered by their insurance plan.
Receive Clinical Summary	Patient receives clinical summary by default or declines to.
Medication History Consent	Patient has given consent to obtain medication history, declines to or unknown.
Note	Additional documentation.

Custom Demographics

Creating a custom demographic allows us to better understand and target a specific group of individuals based on unique characteristics that are not captured by standard demographic categories.

Learn more about custom demographics	Managing Custom Patient Demographics.
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Insurances

Accurate and up-to-date insurance information is essential for ensuring smooth billing processes and avoiding delays in reimbursement for services rendered. Keeping a patient's insurance details current not only supports timely payment but also helps maintain clear communication between healthcare providers, patients, and payers.

Learn more about adding patient insurance	Adding/Updating Insurance on Patient Accounts
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Authorizations

The Authorizations tab is designed to streamline the management of insurance authorizations within the clinical workflow. It offers a centralized location where users can easily add new insurance authorizations, track those that are nearing expiration or have already expired, and monitor the status or manually add a of prior authorizations.

Learn more about prior authorizations	<ul style="list-style-type: none">• Authorizations• Submitting a Prior Authorization using the CoverMyMeds integration (Web)
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Patient Flags

Patient flags provide a convenient way to communicate important information that physicians and staff need to be aware of during care. Patient flags function like digital post-it notes—serving as a quick, visible reminder that can be seen by anyone involved in the patient's treatment. Whether it's a critical medical note, a special instruction, or an administrative reminder, flags help ensure that key details are communicated clearly and consistently across the care team.

Learn more about patient flags	Patient Flags
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Payments

The Payments tab offers a comprehensive snapshot of key patient financial information, helping staff manage billing and payment-related tasks more efficiently. This section provides quick access to important details such as the patient's current account balance, billing statements, and payment history. In addition, users can also manage payment plans, view subscription or membership plans, and more!

Learn more about patient payments	Patient Payments
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