

Tracking Important Dates and Information Using Custom Demographics

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Custom demographics allow you to create structured data fields on a patient's chart to capture information that isn't included in DrChrono's standard fields. This is ideal for tracking items like pregnancy due dates, form expiration dates, task due dates, or any other date or detail your practice needs to monitor consistently.

Because custom demographics are reportable, they're especially useful when you need to pull a list of patients based on a specific value – for example, all patients whose ROI forms expire in July.

Step 1: Create the Custom Demographic Field

- Go to Account > Custom Fields.
- Select Patient Demographics from the left menu. This displays all existing custom demographics.
- Click +Add New Field in the top right corner.
- Fill in the following:
 - **Name:** Enter a clear label, such as "Pregnancy Due Date," "ROI Expiration Date," or "Task Due Date."
 - **Description:** Use this to provide instructions for staff entering data, e.g., "Enter the patient's estimated due date in MM/DD/YYYY format."
 - **Form Name:** Optional. If you want this field to populate in clinical form templates, enter a form variable name here (e.g., "PregnancyDueDate").
 - **Field Type:** Select the type that best matches what you're capturing:
 - Text Field – Short entries up to 30 characters (good for a date in MM/DD/YYYY format)
 - Text Area – Longer entries with no character limit (good for detailed task notes)
 - Single Select – Dropdown with one choice (good for status fields like "Pending / Complete")
 - Multiple Select – Checklist of options (good for tracking multiple document types)
- **Show on OnPatient & DrChrono Check-In:** Check this if you want patients to fill in this field themselves during check-in.
- **Required on OnPatient & DrChrono Check-In:** Check this to make the field mandatory during check-in.
- Click Save.



A Text Field is the simplest choice for tracking a due date. Enter dates consistently (e.g., always MM/DD/YYYY) so reports filter predictably.

Step 2: Enter the Custom Demographic on a Patient's Chart

- Open the patient's chart from Patients > Patient List or via search.
- Click on the Demographics tab.
- Scroll down to the Custom Demographics section.
- Click Manage Custom Patient Demographics.
- Find the field you created and enter the relevant value (e.g., "09/15/2025" for a due date).
- Click Save.

Step 3: Report on Custom Demographics

There are two ways to generate a report based on your custom demographic fields.

Option 1: Filter in the Advanced Report

1. Go to Reports > Advanced Report.
2. Click Patient Filters.
3. Scroll to the right side of the Patient Filter menu to find your custom demographics fields.
4. Check the box next to the field(s) you want to filter by and click Close.
5. Enter the value you want to filter on, then click Update Filter.

The report will display all patients matching your filter criteria.

Option 2: Custom Export

1. Go to Reports > Advanced Report.
2. Click Export to File > Custom Export.
3. On the right side of the Custom Export window, you will see your custom demographic fields listed.
4. Check the boxes for the fields you want included in the export, along with any other data columns you need.
5. Click Export. The report will be delivered to your Message Center.



The Custom Export is ideal when you need a spreadsheet with due dates across your entire patient population – for example, to sort by date and proactively reach out to patients whose forms are expiring soon.

Choosing Between Patient Flags and Custom Demographics

Both tools can help track due dates and tasks, but they serve slightly different purposes:

Use Patient Flags when:

- You want a highly visible at-a-glance indicator visible across the chart, appointments, and clinical notes.
- You want staff to receive a pop-up alert when opening the chart.
- The information is more of a status or category (e.g., “Pregnant,” “Balance Due”) rather than a specific value.

Use Custom Demographics when:

- You need to store a specific value, such as an exact date.
- You want to filter or export a list of patients based on that value.
- You need the data to populate into clinical form templates.
- You want patients to enter the information themselves during check-in.

For many use cases – like tracking pregnancy – using both together works well: a flag provides the visible alert, while a custom demographic stores the specific due date that can be filtered in reports.
