Creating Custom Patient Demographics

07/24/2024 1:25 pm EDT

Some specialties need to collect information that goes beyond the basics of everyday practice. Custom Patient Demographics allow our users to create additional demographic fields to meet the needs of the practice. You can also run reports on custom demographics. To learn more, see our article here.

1. Go to Account > Custom Fields.

Account	Marketplace			
ACCOUNT S	ETTINGS			
User Settin	igs			
Provider Se	ettings			
onpatient \$	Settings			
Account Setup				
Custom Fie	elds			

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** to create a new demographic field.

								+ Add New F	ield	
3	Custom Patient Demogra	phics						Show Archived Fields	+ Add I	New Fiel
	Custom Patient Demographics with [Form Name]	set can be inserted into cli	nical notes via Form Build	er. Only letters (a-z or A-Z),	numbers (0-9) or i	underscore(_) are allow	ved for form name.			
	Name	Form Name	Description	Allowed Values	Records	Updated	Created	Visible on onpatient/Check	k-In	
	What is your preferred pharmacy	Pharmacy			2	Sep 11, 2018	Apr 25, 2018	Yes		Archive
	DL Number	DLNumber	Driver's License		1	Jun 8, 2018	Jun 8, 2018	Yes		Archiv
	Employer	Employer	Employer info		1	Jan 8, 2019	Jan 8, 2019	Yes	/ Edit	Archi
	X									
	Patient Demographics									

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 the form builder, 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
Field Types	
riold type	t Field t Area
Show on onpatient & Sel	ection Itiple select
Text Fields are short fields	(
What is your preferred pharmacy Text Fie	ld Example
) to enter text informat	ion with a 30-character limit.
Text Areas are larger fields	5 (
Employer Text Area Example	Employer info

)to enter text information with no character limit.

Selection fields allow you to create a menu where one option can be selected from the list.

Have you seen a therapist before	✓ F
	Yes
	No

Multiple Select allows you to create a list where more than one option can be selected from the list.

Past Surgical Information	Angioplasty × Tonsillectomy ×
	none
	AP
	Angioplasty
	Tonsillectomy
	Laparotomy

4. Once you have set up the custom demographic, click **Save**.

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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

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.

+ Add new patient	Jenny (Jen) Harris (Female
Demographics	Phone: (650) 215-6343 Email Address: 328 Gibraltar Ave
Appointments	Sunnyvale , CA 94040
Clinical Dashboard	CDS: Adult Immunization Sched
Documents	☑ onpatient access enabled
Tasks 2	Primary Provider: Brendan Wilberton
Problem List	New Referral Fax Demographics 🖨 Print Demographics
Medication List	Important Demographics Insurances Eligibility Authorizations
Send eRx	✓ Sufficient patient demographics to bill insurance.
Allergy List	
	Demographics
	Custom Demographics Manage Custom Patient Demographics
	What is your preferred pharmacy
	DL Number Driver
	Employer Emplo

6. 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.

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Edit Field

Label N	ame Cu	Custom Demos Example Try to keep it short!							
		Wide field	Required field	d					
Spacing within	note 🗌 I	New Line	🗌 New Paragra	oh ⊡Sn	nart Field				
Default v	alue	OFF							
	Genera	ated text							
Edit	O Value	& Patient	🛗 Date 🕐 Da	te & Time	field Dat	e Ø Field Date & Tim	e		
Preview	Header	Subheader	Bold Italic	Underline	X ₂ X ²				
	Pt Demo	ogr ▼ Servi	ice ▼ Date & T	ïme ▼ S	ystem Vitals	Custom Vitals ▼	Custom Pt Demogr -		
	{{cpd_Pa	d_PastSurgicalInfo}}						What is your preferred pharmad	
								Employer	
							DL Nu		
								ey Name	
Billing Pr	ofile (I	None) 🕶					Past S	Surgical Information	
Clinical co	des Co	ode System		Cod	e	Description			
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							Ø Cance	el 🗸 Update field	