

Patient Setup Screen

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Beta Feature: Want early access? Reach out to your CSM or create a support case request Beta access

The modernization of the Patient Setup container screen was a required first step to support enhancements to Demographics, Emergency Contact, and related screens. By updating this framework, we created the foundation needed to build in *HTI-1/USCDI v3 required data fields and value sets* for regulatory compliance. This dependency ensures we can meet certification requirements efficiently while also delivering a more consistent, user-friendly experience across all patient setup areas.

Overview

The Patient Setup container screen has been modernized to establish a consistent UI foundation across demographics, summary, and related person tabs.

Key Updates

- **Modernized Patient Header** – Always visible across tabs for quick reference to key patient details.
- **Enhanced Navigation** – Updated left-hand menu with clear location indicators for easier workflow.
- **Improved Patient Flags** – Flags now display consistently across all Patient Setup tabs, ensuring important alerts are never missed.

The screenshot displays the 'Patient Setup' interface. At the top, the title 'Patient Setup' is followed by buttons for 'New', 'Save', and a menu icon. The patient information bar shows '48625 | Ferrer, Alexander A. (Result Data) | 01/01/2010 | (15.9y) | M'. Below this, there are icons for a person, a flag, the number '18', and a speech bubble. The left sidebar contains a list of tabs: Summary (selected), Demographics, Insurance, Responsible Party, Emergency Contact, Comments, Case Management, Dialysis, MML Self Schedule, Sliding Fee, Immunization Registry, Patient Extension, Miscellaneous, and Referral Tracking. The main content area is a grid of colored squares representing data fields, with colors including light blue, light orange, light grey, and light green.

