

Patient Setup Screen

Last Modified on 05/27/2026 5:03 pm EDT

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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.

Patient Setup

[New](#) [Save](#) [Menu](#) [Close](#)

94080 | O'Test, Auto | 02/14/2000 (26y) | M

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- Summary
- Demographics
- Insurance
- Responsible Party
- Emergency Contact
- Comments
- Case Management
- Dialysis
- MML Self Schedule
- Sliding Fee
- Immunization Registry
- Patient Extension
- Miscellaneous
- Referral Tracking

Chart 94080

123 Automation Dr. Knoxville TN, 37918 test@gmail.com
Home (865) 555-5555
Work
Other
PCP Goldsmith, Clarence
SSN 999-55-8888
Marital Married
Language English
Employer Not Hispanic or Latino
Ethnicity White
Race

Insurance (Active)

Payer Name	Type	Start	Signature On File	Copay	Member ID	Group/Policy #
Aetna (865) 555-5555	Individual Policy	02/15/2000	02/14/2000	\$10.00	123456788	45656756756
Blue Shield - Mississippi	Group Policy		02/14/2000	\$20.00	123456789	123456789

Responsible Party

Name	Address	Home	Work	Other
Auto O'Test	123 Automation Dr. Knoxville TN, 37918	(865) 555-5555		

Appointments - Past

Appointment Date	Duration	Resource	Location	Status	Type
05/07/2026 9:00AM	30m	Doctor MD, Donald	Northwest	Scheduled	New GYN
04/16/2026 11:00AM	30m	Doctor MD, Donald	Northwest	Checked-In	New GYN
02/13/2026 2:00PM	15m	Davidson MD, Clifford	Core Medical Center (sanexas)	Reminder Sent	QA1

Balance Display

Patient Balance: \$18,185.45			
Current	31 - 60	61 - 90	90+ Days
\$140.00	\$0.00	\$0.00	\$18,045.45
Insurance Balance: \$200.00			
Current	31 - 60	61 - 90	90+ Days
\$0.00	\$0.00	\$0.00	\$200.00
Unsubmitted Balance: \$3,193.00			
Current	31 - 60	61 - 90	90+ Days
\$0.00	\$0.00	\$0.00	\$3,193.00
Do Not Bill Totals: \$0.00			
Current	31 - 60	61 - 90	90+ Days
\$0.00	\$0.00	\$0.00	\$0.00