

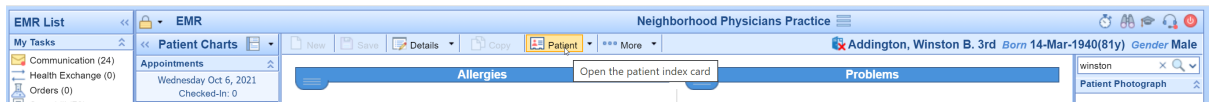
Patient Setup

Last Modified on 10/02/2025 8:14 pm EDT

Patient Rx History Consent

The Patient Setup > Rx Hist. Consent field captures whether a patient consents to the practice pulling the RxHub Patient Medication History for them. Follow these steps to access/update this setting for a patient:

1. Open the **Patient Setup** screen for the appropriate patient.



2. Click on the **Demographics** tab.



3. Select the **Rx Hist.** field and choose the **Consent Given** option if the patient consents to the practice pulling the RxHub Medication History report.

Patient Setup

Summary

Demographics

Insurance

Responsible Party

Emergency Contact

Comments

Case Management

Dialysis

MML Self Schedule

Immun. Registry

New

Save

Train

More

Addington, Winston B. 3rd

Name

First

* Winston

Middle

Barnaby

Last

* Addington

Nick

Suffix

3rd

Address

Address 1

178 Paradise Crescent

Address 2

City

Royal Palm Beach

State

FL

Country

Zip

33411

Demographics

Gender

* Male

Ethnicity

Race

Lang.

English

Location

Primary Location

Active

☒

Reportable

☒

Do NOT print Statements

☐

Contact

Home

(234) 234-2342

Ext

Work

Ext

Other

Ext

Email

Reminder

Provider

PCP

Consent Given

Referring

No Consent

Doctor

Parental/Guardian Consent

Rx Hist.

Parental/Guardian Prescriber Only

Prescriber Only

Consent Given

4. Press the **Save** button.

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Train

More

Addington, Winston B. 3rd Born 14-1

Name

First

* Winston

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Last

* Addington

Address

Address 1

178 Paradise Crescent

Address 2

City

Royal Palm Beach

Patient Setup Screen

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.



Demographics Tab

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

Patient Demographics within Patient Setup Screen

Overview

The Patient Demographics modernization provides a redesigned experience for managing patient data within the Patient Setup screen. This release aligns with USCDIv3 compliance requirements while improving usability and supporting client-requested features.

Key Updates

- **Component Layout:** Demographic data (Name/DOB, Chart Settings, Address, Contact, Occupation, etc.) presented as distinct movable sections.
- **Drag-and-Drop Customization:** Users can reorder sections based on workflow preference. Settings are sticky per user.
- **Preferred Contact Phone Number:** Users can designate Home, Work, or Mobile/Other as the preferred contact. The selected number is displayed with a gold star throughout demographics and summary views.
- **Occupation & Industry Section:** Supports USCDI v3 data requirements with standardized value sets, date tracking (start/end), and support for multiple occupations.
- **Chart Settings Consolidation:** Signature on file, reportable status, “Do Not Print Statements,” and Responsible Party configuration grouped into a single section.
- **Field Label Enhancements:** “Other Phone” updated to “Mobile/Other” for clarity.

Patient Setup | New | Save | 48625 | Ferrer, Alexander A. (Alex) | 01/01/2010 | (15.9y) | M

Name / DOB

First Name * Alexander
Middle Name A
Last Name * Ferrer
Suffix
DOB 01-01-2010
Preferred Name Alex

Address

Address1 * 5669 Pinto Circle
Address2
ZIP Code 46228
City Indianapolis
State IN
Country USA

Contact

Home (555) 555-5555
Home Extension
Work (444) 444-4444
Work Extension
Mobile/Other * (333) 333-3333
Mobile/Other Ext
Email email@email.com
Preferred Contact Mobile/Other
Reminder Phone Other (No VM)

Chart Settings

RHC
User Defined
Signature on File * Yes 01-01-2022
Chart Settings Active
Reportable
Do NOT Print Statements
Responsible Party Same as Patient


Status

Marital Married
Identification SSN 555-22-4444

New Preferred Contact Field

This new field allows users to set a patient's preferred contact. Doing so appends a gold star icon to indicate a

favorite contact number for reaching the patient. This will display in the Demographics tab, the Summary tab, and in the Patient Header tool-tip across all main system screens when set in the Patient Setup screen on the Demographics tab under contacts:



| Contact | |
|-------------------|-----------------|
| Home | (555) 555-5555 |
| Home Extension | |
| Work | (444) 444-4444 |
| Work Extension | |
| Mobile/Other ★ | (333) 333-3333 |
| Mobile/Other Ext | |
| Email | email@email.com |
| Preferred Contact | Mobile/Other ▼ |
| Reminder | Home |
| Status | Mobile/Other |
| | Work |

Summary Tab Display

| Chart 48625 | | | | | |
|------------------------|----------------|----------------|-----------------|---------------------|-------------------------------------|
| 5669 Pinto Circle | Home | (555) 555-5555 | PCP | Goldsmith, Clarence | Employer General Access |
| Indianapolis IN, 46228 | Work | (444) 444-4444 | SSN | 555-22-4444 | Ethnicity Hispanic or Latino |
| email@email.com | Other ★ | (333) 333-3333 | Marital | Married | Race Other |
| | | | Language | English | |

Patient Header Tooltip Display

| Care Team Members | |
|--------------------------|-------------------------------------|
| Name > Kinsey Davis, DPT | Patient Ferrer, Alexander A. (Alex) |
| | Born 01-Jan-2010 (15.9y) |
| | Gender Male |
| | Primary Ins. Medicare |
| | Secondary Ins. Medicaid |
| | Home (555) 555-5555 |
| | Work (444) 444-4444 |
| | Other ★ (333) 333-3333 |
| | Referring Smith MD, Lane C. |
| | Phone (574) 534-0050 |
| | Fax (574) 534-0411 |
| | Doctor Smith MD, Lane C. |
| | Phone (574) 534-0050 |
| | Fax (574) 534-0411 |
| | PCP Goldsmith, Clarence |
| | Phone (555) 337-2278 |
| | Fax (555) 505-5005 |
| | MML Status Not Enabled - Invite |
| | Chart # 48625 |
| | Flags Edit Settings |

Occupation

This new Demographic section is added for compliance with USCDiv3 to capture the official values for Occupation and Industry using our new search fields to load from the large data values that are required for incorporating occupation data into patient CCDA documents. This new field is not going to capture data from the original 'Employer' field contained within the Demographics 'Status' section because the values do not align with the USCDiv3 requirements. For that reason, all users will initially see a blank occupation section as shown below:

| Occupations | | | |
|----------------------------------|----------|--------------|----------|
| Start Date * | End Date | Occupation * | Industry |
| + Add Occupation | | | |

To create an entry users will just click on the Add Occupation button and complete the minimum required fields. Occupation and Industry field values are values designated by USCDIV3 - the listing is vast so we have provided flexible search capabilities for efficiency. With the required fields completed just save the changes.

| Occupations | | | |
|---|----------------------|---|---|
| Start Date * | End Date | Occupation * | Industry |
| <input type="text" value="10-17-2019"/> | <input type="text"/> | <input type="text" value="Firefighters"/> | <input type="text" value="Investigation Services"/> |
| + Add Occupation | | | |

If you need to remove an occupation you can click on the red trash can icon to the right of the record. You will be prompted to confirm the you want to remove the record. Clicking 'yes' permanently removes the entry and clicking 'no' cancels the deletion. Auditing for this new section is found in the Demographics audit screen.

Patient Setup

Sexual Orientation

Ethnicity

Specific Ethnicity

Race

other *

Hispanic or La

Cuban

Other

Hispanic India

New

Save

Menu

48625 Ferrer, Alexander A.

Confirm

Are you sure you want to remove occupation: Firefighters?

Yes No

Summary Tab

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

Summary Tab within Patient Setup Screen

Overview

The Summary tab has been redesigned for usability and flexibility.

Key Updates

- ### Note

Patient Setup - Google Chrome

Patient Setup

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

New
Save
Menu

48625 | Ferrer, Alexander A. (Result Data) | 01/01/2010 | (15.9y) | M

Icons

Chart 48625

| | | | | | |
|---|------------------------|--|-----------------------------|--------------------------------|----------------|
| 5669 Pinto Circle Indianapolis IN, 46228 | Home Work Other | (555) 555-5555 (444) 444-4444 (333) 333-3333 | PCP Marital Language | Employer Ethnicity Race | General Access |
|---|------------------------|--|-----------------------------|--------------------------------|----------------|

Insurance (Active)

| Payer Name | Type | Start | Signature On File | Copay | Member ID | Group/Policy # |
|----------------------------|-----------------|-------|-------------------|--------|-------------|----------------|
| Medicare | Medicare Part B | | 01/01/2022 | \$0.00 | 583451326A | |
| Medicaid (333) 333-3333 x0 | Medicaid | | 01/01/2022 | \$0.00 | 11048487311 | |

Cases (Active)

| Care Date | Program | Status | Case Manager |
|------------|---------|--------|----------------------|
| 12/11/2024 | CCM/RPM | Active | Ferrer, CCMA, Ginnie |

Employer (Active)

| Clinic Start | Clinic End | Registration | Wellness | Health Plan | Sub Population | Department | Locality |
|--------------|------------|--------------|----------|-------------|----------------|------------|----------|
| 06/04/2020 | | 06/04/2020 | | | | | |

Responsible Party

| Name | Address | Home | Work | Other |
|--------------------------------------|--|----------------|----------------|----------------|
| Alexander Ferrer (Self) Minor | 104 Sloan Drive Springfield TN, 37172 | (615) 667-4169 | (615) 389-6394 | (615) 389-1341 |
| Alexander A. Ferrer | 5669 Pinto Circle Indianapolis IN, 46228 | (555) 555-5555 | (444) 444-4444 | (333) 333-3333 |

Appointments - Past

| Appointment Date | Duration | Resource | Location | Status | Type |
|--------------------|----------|----------------------|---------------------------|------------|--------------|
| 09/09/2025 3:15PM | 15m | Davis's M.D., Thomas | | Checked-In | TPI |
| 03/06/2025 12:00PM | 15m | Davis DPT, Kinsey | EverHealth Medical Center | Checked-In | Allergy Shot |
| 02/21/2025 2:00PM | 15m | Davis DPT, Kinsey | EverHealth Medical Center | Scheduled | Allergy Shot |

Patient Balance \$0.00

Emergency Contact Tab

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

Emergency Contact Tab (Related Person)

Overview

Emergency Contact now reflects USCDiv3 “Related Person” compliance requirements. Existing information within this screen has been preserved and properly mapped to the designated USCDiv3 fields and expands the selections available to users as is required by CMS.

Key Updates

- Primary and Secondary contacts labeled more clearly.
- Users can switch which contact is designated as primary utilizing the radio buttons above the name field without losing contact details.
- The new eraser icon allows users to easily delete contact details.
- Permissions for PHI access, medication pickup, and detailed messaging retained.
- Relationship drop-down delivers several more options for relationship designation (in accordance with USCDiv3 requirements).
- Modernized UI aligned with other updated screens.

Patient Setup - Google Chrome

Patient Setup

48625 | Ferrer, Alexander A. | 01/01/2010 | (15.9y) | M

Related Person (Primary)

Related Person (Secondary)

Summary

Demographics

Insurance

Responsible Party

Emergency Contact

Comments

Case Management

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MML Self Schedule

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Immunization Registry

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Miscellaneous

Referral Tracking

Related Person

Primary Secondary

Name

Relationship

Home

Home Extension

Work

Work Extension

Mobile/Other

Mobile/Other Extension

Email

Permissions

Granted Full PHI Access

May Pick Up Medications

Authorized to Leave Detailed Messages for Contact

Exclusions to PHI

Comments

Related Person

Primary Secondary

Name

Relationship

Home

Home Extension

Work

Work Extension

Mobile/Other

Mobile/Other Extension

Email

Permissions

Granted Full PHI Access

May Pick Up Medications

Authorized to Leave Detailed Messages for Contact

Exclusions to PHI

Comments

Miscellaneous Tab

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

Overview

Minor modernization for consistency across Patient Setup.

Key Updates

- Component layout for Chronic Care Management and NY Preschool Billing.
- Drag-and-drop reordering supported.
- Usability tested and updated for compliance.

Tip: For more details on any of the features within this miscellaneous tab, you can use the search field at the top of the page for the specific item such as "RecordSync" or "CKCC".

Patient Setup - Google Chrome

48625 | Ferrer, Alexander A. | 01/01/2010 | (15.9y) | M

Patient Setup

Summary
Demographics
Insurance
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Emergency Contact
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Appointment Reminders

| Reminder Type | Consent | Reminder Value |
|---------------|-------------------------------------|---|
| Phone Calls | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> Home <input type="radio"/> Work <input type="radio"/> Other <input type="radio"/> Override |
| Text Messages | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> Home <input type="radio"/> Work <input type="radio"/> Other <input type="radio"/> Override |
| Email | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> Patient <input type="radio"/> Override |

Health Information Exchange

| | |
|----------------|--|
| Consent | <input type="radio"/> Unknown <input type="radio"/> Granted <input type="radio"/> Denied |
| Effective Date | <input type="text"/> |

CKCC Status

| | |
|------------|---|
| CCM Status | <input type="radio"/> Unknown <input type="radio"/> Enrolled <input type="radio"/> Disenrolled <input type="radio"/> Opted-Out <input type="radio"/> Deceased |
| CCM Date | <input type="text"/> |

Prescription Education

| | |
|----------------|-------------------------------------|
| Education Type | Consent |
| Text Messages | <input checked="" type="checkbox"/> |

MDRevolution Status

| | |
|------------|--|
| CCM Status | <input type="radio"/> Unknown <input type="radio"/> Enrolled <input type="radio"/> Disenrolled <input type="radio"/> Opted-Out |
| CCM Date | <input type="text"/> |
| RPM Status | <input type="radio"/> Unknown <input type="radio"/> Enrolled <input type="radio"/> Disenrolled <input type="radio"/> Opted-Out |
| RPM Date | <input type="text"/> |

Record Locator Consent

| | |
|---------------|---|
| Consent Given | <input type="checkbox"/> |
| Sync Status | Not synced with Surescripts yet <input type="button" value="Sync"/> |