

Patient Setup

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

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.

Patient Setup

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

- 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
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Insurance (Active)

Payer Name	Type	Start	Signature On File	Copay	Member ID	Group/Policy #
Aetna (865) 555-5555 Blue Shield - Mississippi	Individual Policy Group Policy	02/15/2000	02/14/2000 02/14/2000	\$10.00 \$20.00	123456788 123456789	45656756756 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			
\$0.00	\$0.00	\$0.00	\$200.00
Unsubmitted Balance: \$3,193.00			
\$0.00	\$0.00	\$0.00	\$3,193.00
Do Not Bill Totals: \$0.00			
\$0.00	\$0.00	\$0.00	\$0.00

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

- **Drag-and-Drop Component Reordering** (sticky user preference).
- Dedicated **Edit (pencil) icons** required to update sections.
- **Preferred Contact Phone** (gold star indicator) driven by new Demographics field allowing users to set patient's Preferred Contact.
- **Minor Flagging**: Responsible party flagged as MINOR in red when under configured age of majority.
- **Appointment Data Grouping**: Past and Future sections move together.

Note

Historically the minor flag has been hard coded and set to flag any patient under the age of 18 as a minor. Practices can now designate their desired age to meet their needs via a new company setting (see [Responsible Party is a Minor](#) for more details).

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

Chart 48625

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

Payer Name	Type	Start	Signature On File	Copay	Member ID	Group/Policy #
Medicare	Medicare Part B	01/01/2022	01/01/2022	\$0.00	583451326A	
Medicaid (333) 333-3333 x0	Medicaid			\$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 Alexander A. Ferrer	104 Sloan Drive Springfield TN, 37172 5669 Pinto Circle Indianapolis IN, 46228	(615) 667-4169 (555) 555-5555	(615) 389-6394 (444) 444-4444	(615) 389-1341 (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

Demographics Tab

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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.

The screenshot shows a 'Patient Setup' form for Alexander A. Ferrer. The form is organized into several sections:

- Name / DOB:** First Name: Alexander, Middle Name: A, Last Name: Ferrer, Suffix: (empty), DOB: 01-01-2010, Preferred Name: Alex.
- Address:** Address1: 5669 Pinto Circle, Address2: (empty), ZIP Code: 46228, City: Indianapolis, State: IN, Country: USA.
- Contact:** Home: (555) 555-5555, Home Extension: (empty), Work: (444) 444-4444, Work Extension: (empty), Mobile/Other: (333) 333-3333 (marked with a gold star), Mobile/Other Ext: (empty), Email: email@email.com, Preferred Contact: Mobile/Other, Reminder: Phone Other (No VM).
- Chart Settings:** RHC: (empty), User Defined: (empty), Signature on File: Yes (checked), Date: 01-01-2022, Chart Settings: Active (checked), Reportable (checked), Do NOT Print Statements (unchecked), Responsible Party Same as Patient (checked).
- Status:** Marital: Married.
- Identification:** Primary: SSN, Phone: 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 Indianapolis IN, 46228 email@email.com	Home (555) 555-5555 Work (444) 444-4444 Other ★ (333) 333-3333	PCP Goldsmith, Clarence SSN 555-22-4444 Marital Married Language English	Employer General Access Ethnicity Hispanic or Latino Race Other
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Patient Header Tooltip Display

48625 | Ferrer, Alexander A. (Alex) | 01-Jan-2010 (15.9y) | M

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

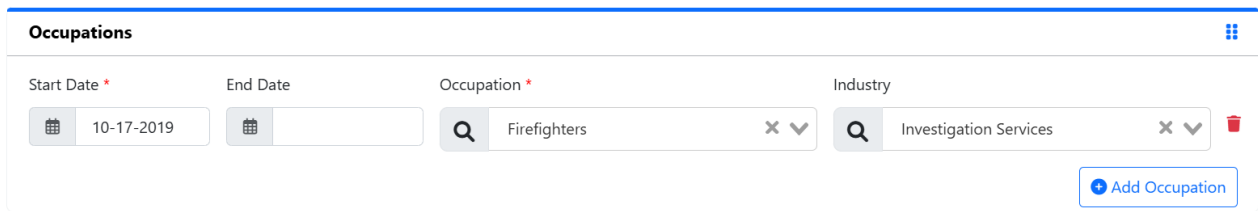
This new Demographic section is added for compliance with USCDiv3 to capture the official values for Occupation and Industry using our new search fields to load from the large data values that are required for incorporating occupation data into patient CCDAs. This new field is not going to capture data 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.

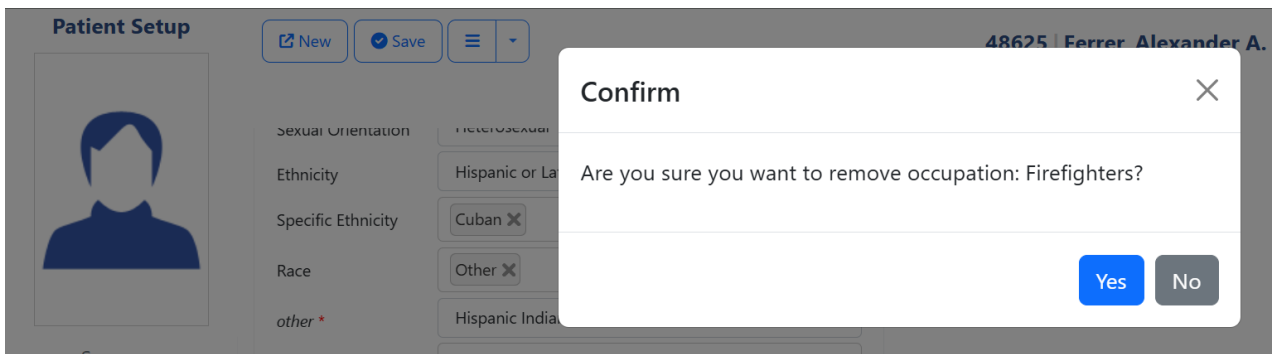


Occupations

Start Date * 10-17-2019 End Date Occupation * Firefighters Industry 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 48625 Ferrer, Alexander A.

New Save

Sexual Orientation: heterosexual
Ethnicity: Hispanic or La
Specific Ethnicity: Cuban
Race: Other
other * Hispanic India

Confirm

Are you sure you want to remove occupation: Firefighters?

Yes No

Emergency Contact Tab

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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.

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Miscellaneous Tab

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

Overview

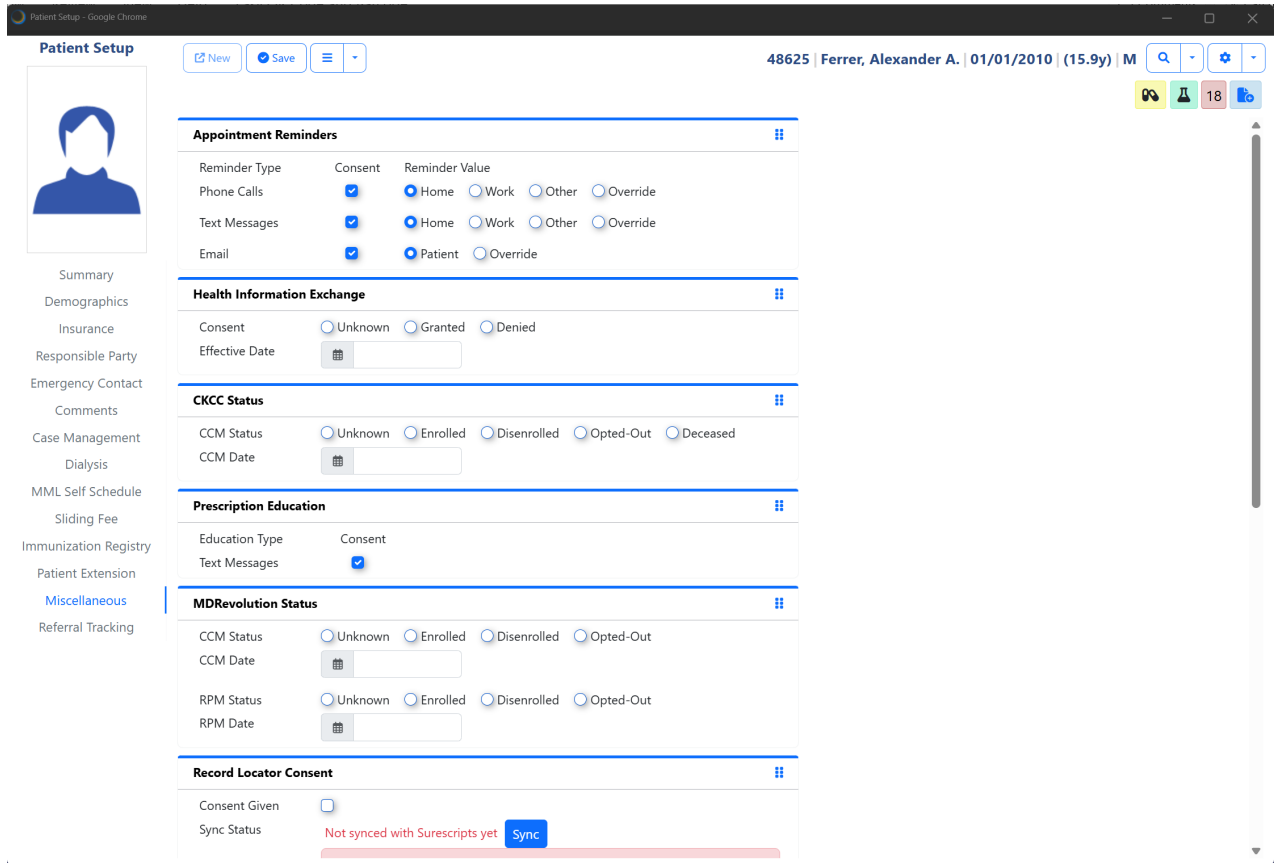
Minor modernization for consistency across Patient Setup.

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 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.

Patient Setup

Chart 311999
 178 Paradise Crescent Home Work (234) 234-2342 PCP SSN
 Royal Palm Beach, FL 33411 Other Marital Language English
 USA

Apparatus Inc. (Active)
 Clinic Start 08/08/2019 Health Plan
 Clinic End 08/08/2019 Sub. Pop.
 Registration 08/08/2019 Department
 Wellness Locality

Winston B. Addington 3rd
 178 Paradise Crescent Home Work (234) 234-2342
 Royal Palm Beach, FL 33411 Other
 USA

Past 3 Visits
 08/18/2021 1:00PM (30m) Brooks MD, Kristi F. St Vincents Hospital Scheduled Adult Physical

Summary
Demographics
 Insurance

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

Addington, Winston B. 3rd

New Save Train More

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

Contact

Home (234) 234-2342 Ext
 Work Ext
 Other Ext
 Email
 Reminder

Active Reportable Do NOT print Statements

Provider

PCP **Consent Given**
 No Consent
 Parental/Guardian Consent
 Parental/Guardian Prescriber Only
 Prescriber Only

Referring
 Doctor
 Rx Hist. Consent Given

Summary
Demographics
 Insurance
 Responsible Party
 Emergency Contact
 Comments
 Case Management
 Dialysis
 MML Self Schedule
 Immun. Registry

4. Press the **Save** button.

Patient Setup

Addington, Winston B. 3rd Born 14-

New **Save** Train More

Save record

Name

First * Winston
 Middle Barnaby
 Last * Addington

Address

Address 1 178 Paradise Crescent
 Address 2
 City Royal Palm Beach

