

Demographics Tab

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

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 USCDI v3 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 - Google Chrome

Patient Setup [New] [Save] [Menu]

48625 | Ferrer, Alexander A. (Alex) | 01/01/2010 | (15.9y) | M [Search] [Settings] [Close]

[Icons: Home, Person, Bell, 18, Mail]



Summary

Demographics

Insurance

Responsible Party

Emergency Contact

Comments

Case Management

Dialysis

MML Self Schedule

Sliding Fee

Immunization Registry

Patient Extension

Miscellaneous

Referral Tracking

Name / DOB		Address	
First Name *	Alexander	Address1 *	5669 Pinto Circle
Middle Name	A	Address2	
Last Name *	Ferrer	ZIP Code	46228
Suffix		City	Indianapolis
DOB	01-01-2010	State	IN
Preferred Name	Alex	Country	USA

Contact		Chart Settings	
Home	(555) 555-5555	RHC	
Home Extension		User Defined	
Work	(444) 444-4444	Signature on File *	Yes 01-01-2022
Work Extension		Chart Settings	Active
Mobile/Other ★	(333) 333-3333		Reportable
Mobile/Other Ext			Do NOT Print Statements
Email	email@email.com		Responsible Party Same as Patient
Preferred Contact	Mobile/Other		
Reminder	Phone Other (No VM)		



Status		Identification	
Marital	Married	Primary	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	<input type="text" value="(555) 555-5555"/>
Home Extension	<input type="text"/> <input type="text"/>
Work	<input type="text" value="(444) 444-4444"/>
Work Extension	<input type="text"/> <input type="text"/>
Mobile/Other ★	<input type="text" value="(333) 333-3333"/>
Mobile/Other Ext	<input type="text"/> <input type="text"/>
Email	<input type="text" value="email@email.com"/>
Preferred Contact	<div>Mobile/Other ▼</div>
Reminder	<div>Home</div> <div>Mobile/Other</div> <div>Work</div>

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 - In vite
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

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

10-17-2019

Firefighters

x

Investigation Services

x

+ 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

New

Save

48625 Ferrer, Alexander A.

Sexual Orientation

Ethnicity

Specific Ethnicity

Race

other *

Heterosexual

Hispanic or La

Cuban

Other

Hispanic India

Confirm

Are you sure you want to remove occupation: Firefighters?

Yes

No