Demographics Tab

Last Modified on 09/09/2026 12:45 pm EDT

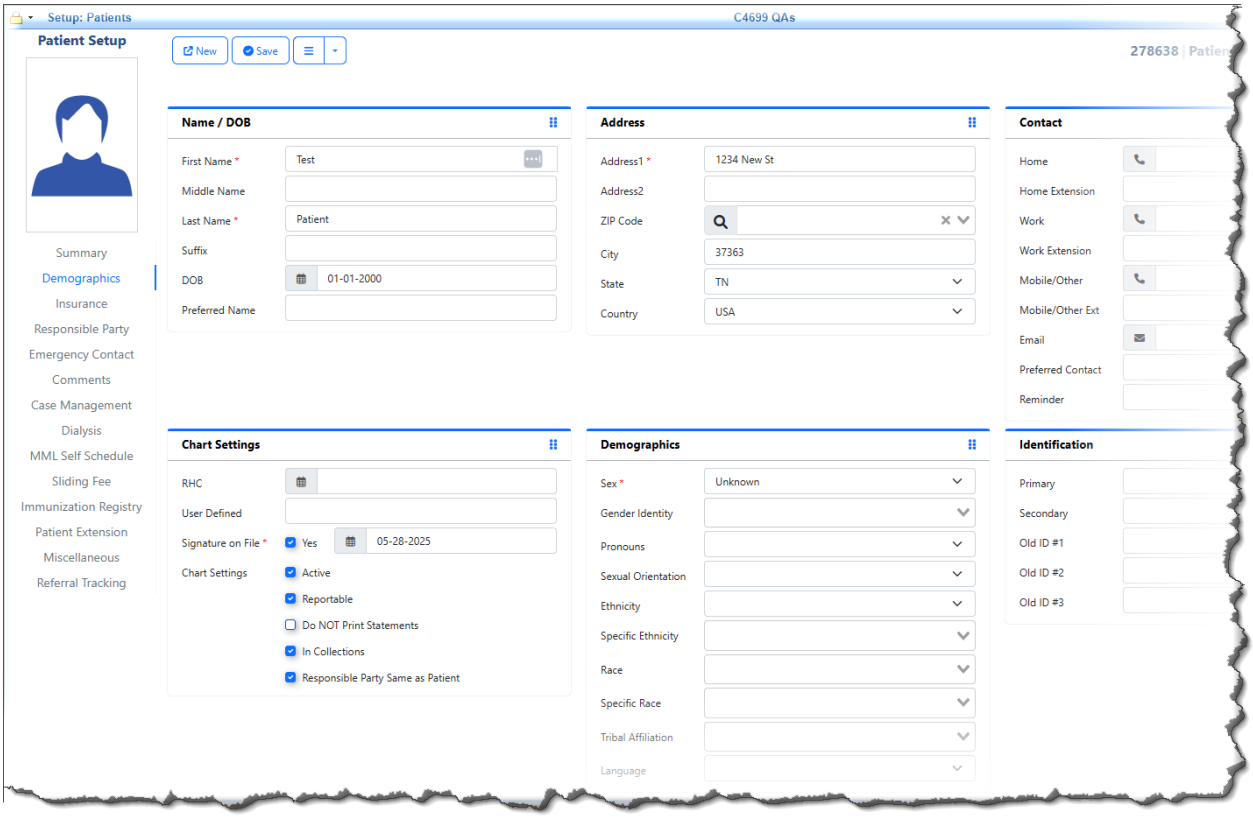
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Patient Demographics within Patient Setup Screen

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.

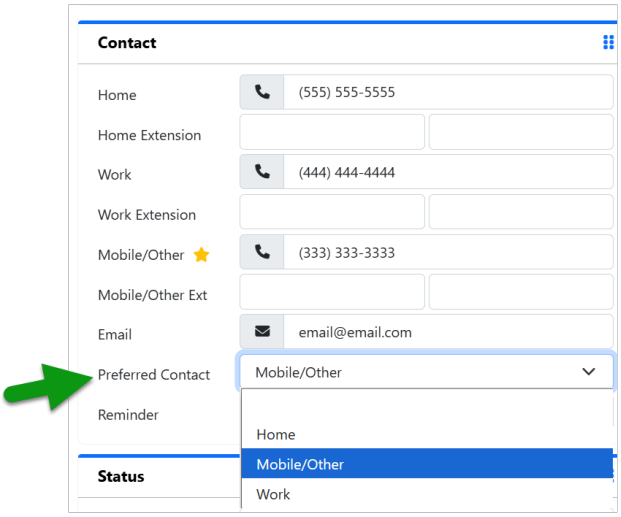
Key Updates

- **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,” In Collections (which triggers a collection alert that displays anywhere the patient is loaded), and Responsible Party configuration grouped into a single section.
- **Field Label Enhancements**: “Other Phone” updated to “Mobile/Other” for clarity.

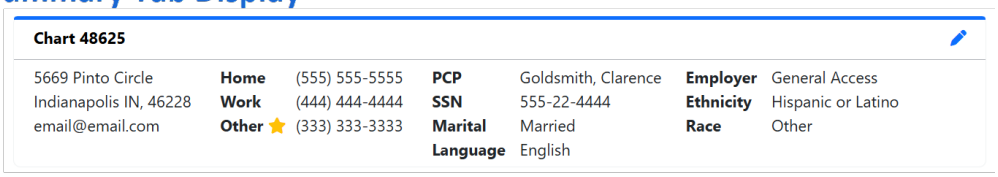


New Preferred Contact Field

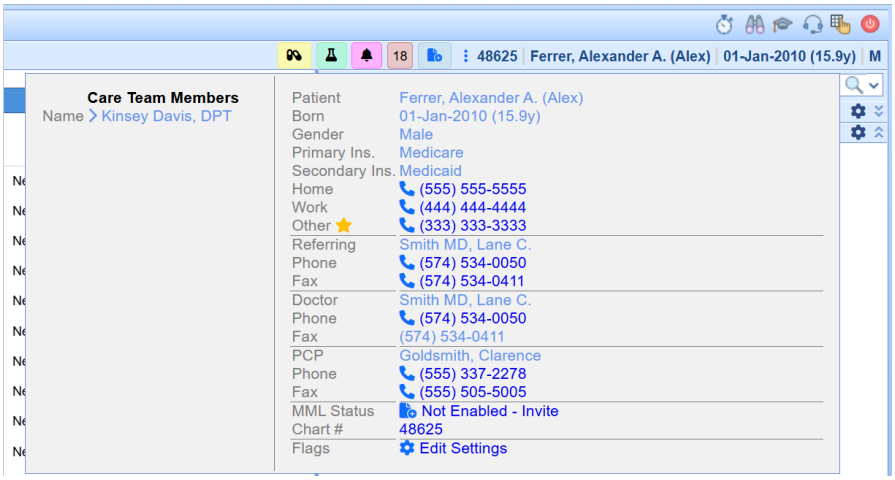
This new field allows users to set a patient's preferred contact. Doing so appends a gold star icon to indicate a favorite contact number for reaching the patient. This will display in the Demographics tab, the Summary tab, and in the Patient Header tool-tip across all main system screens when set in the Patient Setup screen on the Demographics tab under contacts:



Summary Tab Display

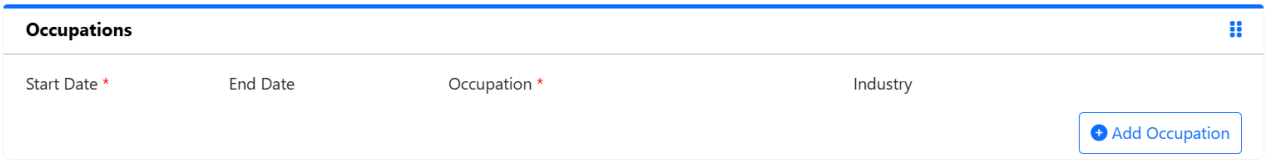


Patient Header Tooltip Display



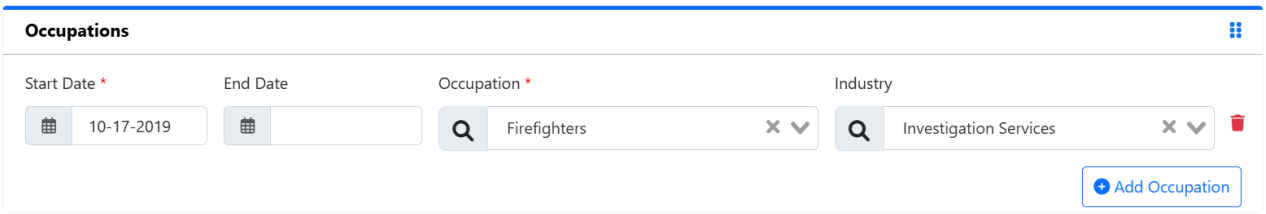
Occupation

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:



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.



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.

