

# Summary Tab

Last Modified on 10/02/2025 6:52 pm EDT

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 - Google Chrome

Patient Setup

NewSaveMenu

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

Icons

Summary

Demographics

Insurance

Responsible Party

Emergency Contact

Comments

Case Management

Dialysis

MML Self Schedule

Sliding Fee

Immunization Registry

Patient Extension

Miscellaneous

Referral Tracking

Chart 48625

5669 Pinto Circle  
Indianapolis IN, 46228

Home (555) 555-5555  
Work (444) 444-4444  
Other (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) <span>Minor</span> 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