

System Preferences: Demographics

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Version 21.1

Path: Admin tab > Global Preferences button > Demographics tab

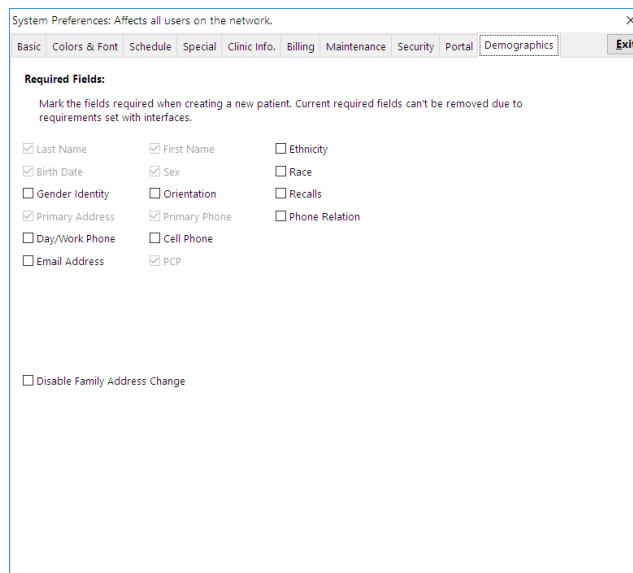


User Permission: The System Preferences window is only available to users with permission: **AA_SystemAdmin_mi**.

About

The Demographics tab of the System Preferences allows you to determine which fields (in addition to the required 7) should be **required** when creating a new patient's chart.

This tab also contains a global preference that will disable the **Family Address Change form** from opening anytime a primary phone or address is changed on a patient.



System Preferences: Affects all users on the network.

Basic Colors & Font Schedule Special Clinic Info. Billing Maintenance Security Portal Demographics Exit

Required Fields:
Mark the fields required when creating a new patient. Current required fields can't be removed due to requirements set with interfaces.

<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Ethnicity
<input checked="" type="checkbox"/> Birth Date	<input checked="" type="checkbox"/> Sex	<input type="checkbox"/> Race
<input type="checkbox"/> Gender Identity	<input type="checkbox"/> Orientation	<input type="checkbox"/> Recalls
<input checked="" type="checkbox"/> Primary Address	<input checked="" type="checkbox"/> Primary Phone	<input type="checkbox"/> Phone Relation
<input type="checkbox"/> Day/Work Phone	<input type="checkbox"/> Cell Phone	
<input type="checkbox"/> Email Address	<input checked="" type="checkbox"/> PCP	

Disable Family Address Change

- **Required Fields**

- Fields that are marked as required will appear in **Red** text on the Demographics screen when creating a new patient's chart. You will not be able to save the new chart until all required fields are met. **Last Name, First Name, Birth Date, Sex, Primary Address, Primary Phone, and PCP** will always be required and can't be changed.
- To set new required fields when registering a new patient, check the **checkbox** for each field you want to be required, then **close** out of the System Preferences window.
- You can remove any required fields you have set to be required except for the seven that OP makes required to meet requirements with interfaces. To remove, uncheck the checkbox next to the field you would like to remove.
- To view the changes, navigate to the **Patient Chart > Demographics** tab. You will see the text for each required field appear in **Red** (pictured below). As information is entered into the required fields, the text will turn to black. Once all the required fields are met, you can save the new patient's chart. If you try to save with the required fields left blank, the system will alert you and will not save the chart.

Demographics
New Delete Save Cancel Copy From Merge Print

New patient: Please complete and save this page first, then the rest of the chart will become available.

Patient number: 17696 Last / Suffix: <input type="text"/> First: <input type="text"/> Middle: <input type="text"/> Birth date: <input type="text"/> <input type="text"/> Sex/ Gender: <input type="text"/> Unknown Identity: <input type="text"/> Orientation: Don't Know Language: <input type="text"/> Primary address: <input type="text"/> County/country: <input type="text"/>	Alternate ID: <input type="text"/> Alt last name: <input type="text"/> Alt first name: <input type="text"/> Age: <input type="text"/> Ethnicity: <input type="text"/> Unknown Race(s): <input type="text"/> Unknown Status: Active as of: 2/1/2023 Register date: 02/01/2023 Last visit: Last update: by: Portal Acct: Inactive
Phone # Ext. Relation: Primary phone: - - Day/Work: - - Cell phone: - - Email address: Emerg. contact: VFC eligibility: NOT ELIGIBLE Medical home: A PCP: Team: Risk group:	Patient Preferred Contact Methods Recalls: <input type="text"/> General: Portal: Reminders: Photo ID

- **Disable Family Address Change**

- By default, all practices have the Family Address change enabled, meaning the **Family Address Change form** will open anytime a primary phone or address is changed on a patient.
- To disable this, select the **Disable Family Address Change** checkbox, then **close** the System Preferences window.