
10-5-2020

Demographics (PM)

Redesigned Demographics Screen

We are happy to announce a comprehensive redesign of patient **Demographics**. You can now search, retrieve, and work with patient data within a customizable framework of demographic links, corresponding summary cards, and a central work screen. The streamlined screen layout provides easy access to all demographics topics.

To use the redesigned demographics screen, click the new orange Patient icon. 

The **Demographics** screen redesign will be released to clients in stages.

Key enhancements for this release include the following:

- **Summary Cards**
- **Customizable Screen Layout**
- **Navigation Pane**
- **Enhanced Patient Search**
- **Patient Quick Add Icon**
- **Redesigned Patient Action Icons**

Future developments for the **Demographics** screen redesign will include updating all demographics topic work screens, beginning with **Inbound**, **Outbound**, and **Marketing Referrals**, and adding a summary card for each additional topic.

Click the **Patient Info (New)** icon. 

Patient

Patient Name: BETZ, NANCY
 Apt / Site #: 1449
 Address: 324 PEACH TREE DRIVE
 Zip Code: 84111-4333 City: SALT LAKE CITY State: UT Country: USA

Sex: FEMALE
 GI: FEM
 SO: STRU
 Title: MS

Preferred Phone: (801) 209-4432 (CELL)
 Email: NBETZ@GMAIL.COM
 Confidential: EMAIL

Marital Status: MARRIED
 Date of Birth: 01/07/1960 80 Y / 7 M
 Inactive / Deceased
 SSN#: 2399

Financial Class: BC (BLUE CROSS BLUE SHIELD)
 Relationship: 18-SELF
 Provider Profile: NTYLER TYLER, NATALIE
 Employer: SUPERIOR CARE PHARM PCP: RIC00 Race & Ethnicity:

Seq	Coverage	Carrier	Subscriber	ID #	Copy
2	AUTO	UNITED HEALTHCARE	BETZ, NANCY	2399	12.00
1	UNEMPLOYED	UNITED HEALTHCARE	BETZ, NANCY	2399	12.00

Unapplied: 0-30 31-60 61-90 91-120 121+ Total

Patient: 0.00 0.00 2411.00 0.00 500.40 2911.40

Insurance: 0.00 0.00 69.00 0.00 0.00 69.00

Active Work Screen

Card is active


Insurance

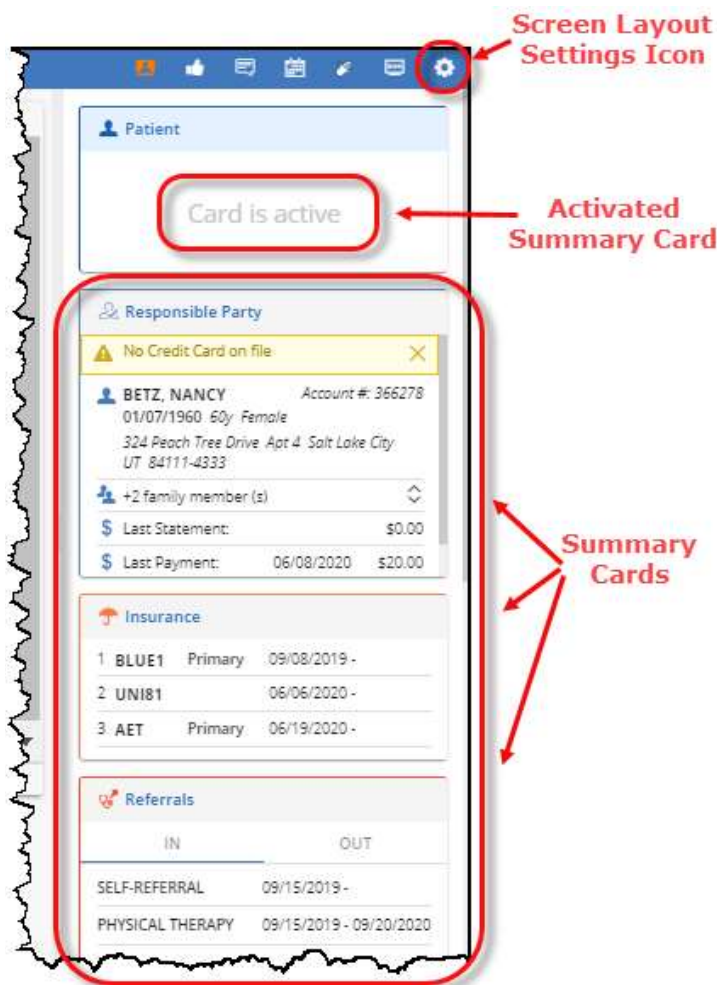
1	BLUE1	Primary	09/08/2019 -
2	UNIB1	06/06/2020 -	
3	AET	Primary	06/19/2020 -

Referrals




IN	OUT
SELF-REFERRAL	09/15/2019 -
PHYSICAL THERAPY	09/15/2019 - 09/20/2020

View Summary Cards and Customize Screen Layout

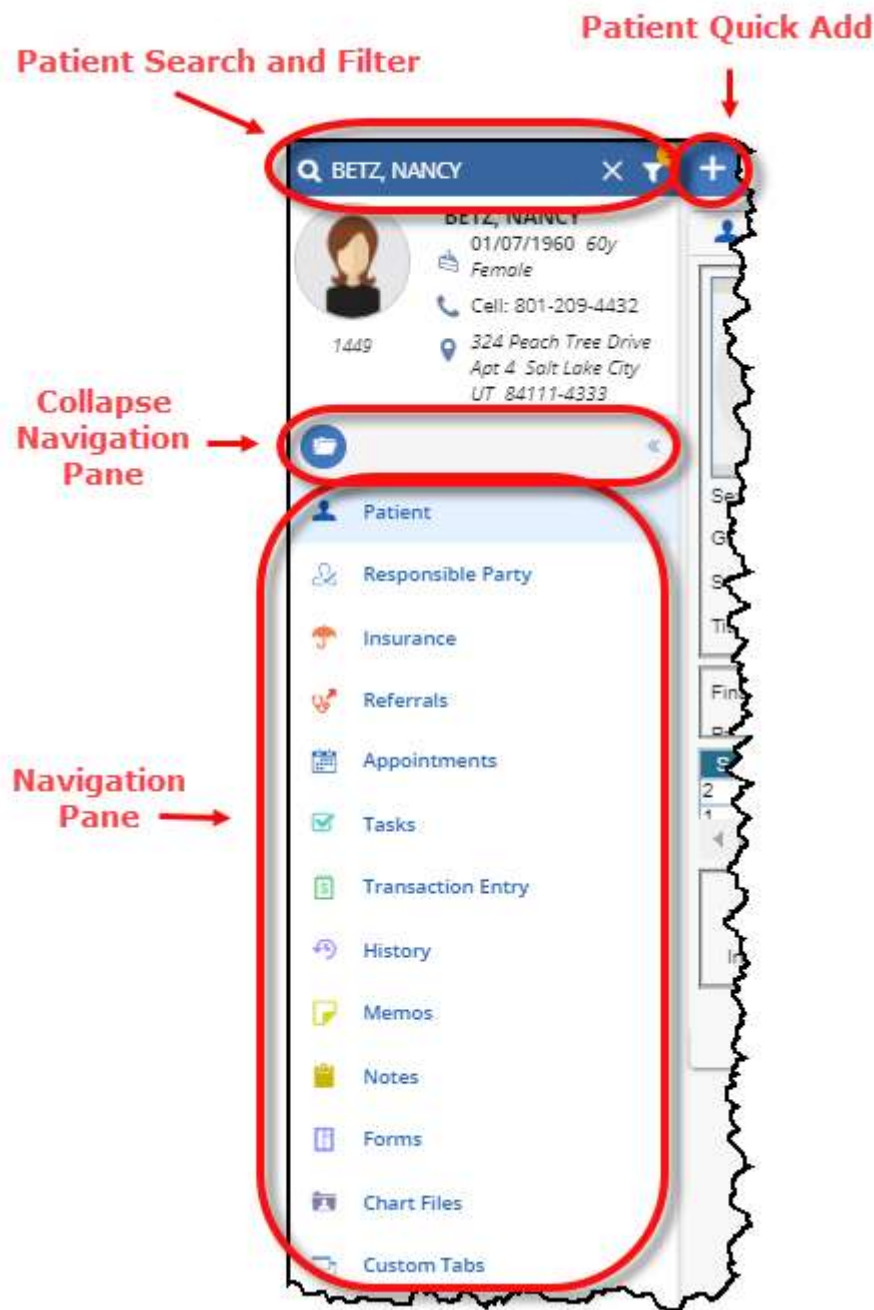
- Each demographic screen topic has an associated summary card to display key data in a compact format. You can click a summary card to activate the associated work screen.
- Customize your workspace by rearranging and resizing summary cards. Additionally, you can move summary cards to the other side of the screen using the Settings icon. 
- The following summary cards are available on the new **Demographics** screen with this release:
 - Patient**
 - ResponsibleParty**
 - Referrals**
 - Insurance**
 - Appointments History**



Use Navigation Pane, Enhanced Patient Search, and Patient Quick Add Icon

- Demographics tabs have been replaced by a new navigation pane with links to demographics work screens. When you click a topic link in the navigation pane, the associated work screen launches. To gain workspace, collapse the Navigation pane by clicking the Folder icon  or the Collapse icon, .
- Patient search has been enhanced to match the patient search and filtering in **Scheduler**.
- We have added **Patient Quick Add** icon  to the Demographics screen toolbar for

easy access.



Redesigned Patient Action Icons

The newly designed demographics screen also includes redesigned patient action icons. There is no change in functionality for the icons.

Patient Action Icons

