Set Phone Number and Date of Birth Formats for EHR Copy Paste

Purpose: Make copied data paste directly into your EHR without edits.

Steps

1. Open any call.
2. In the right panel, locate the settings for Phone Number Format and Date of Birth Format.
3. Choose the format your EHR expects.
   - Phone example formats: (617) 800-9983, 617-800-9983, 6178009983.
   - DOB example formats: 12-03-1994, 12/03/1994, 1994-12-03.
4. Save your selection.
5. The display and copy action will now use your saved formats for all calls.

Tips and good practice

- These settings are persistent. Set them once per workspace.

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