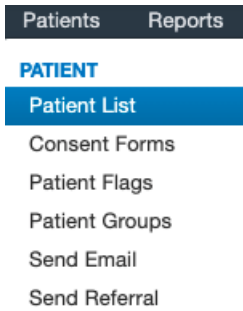


How do I add new patients and how do I edit information on existing patients?

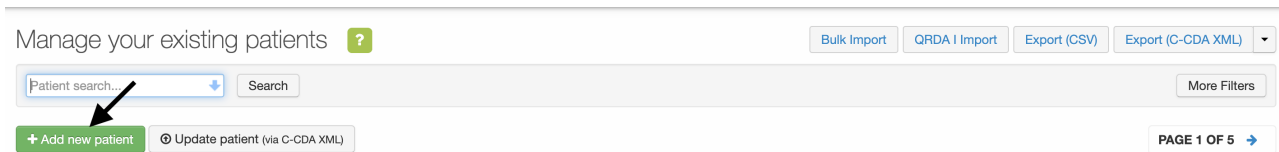
07/08/2024 7:59 pm EDT

1. Hover over **Patients** and click **Patient List**.



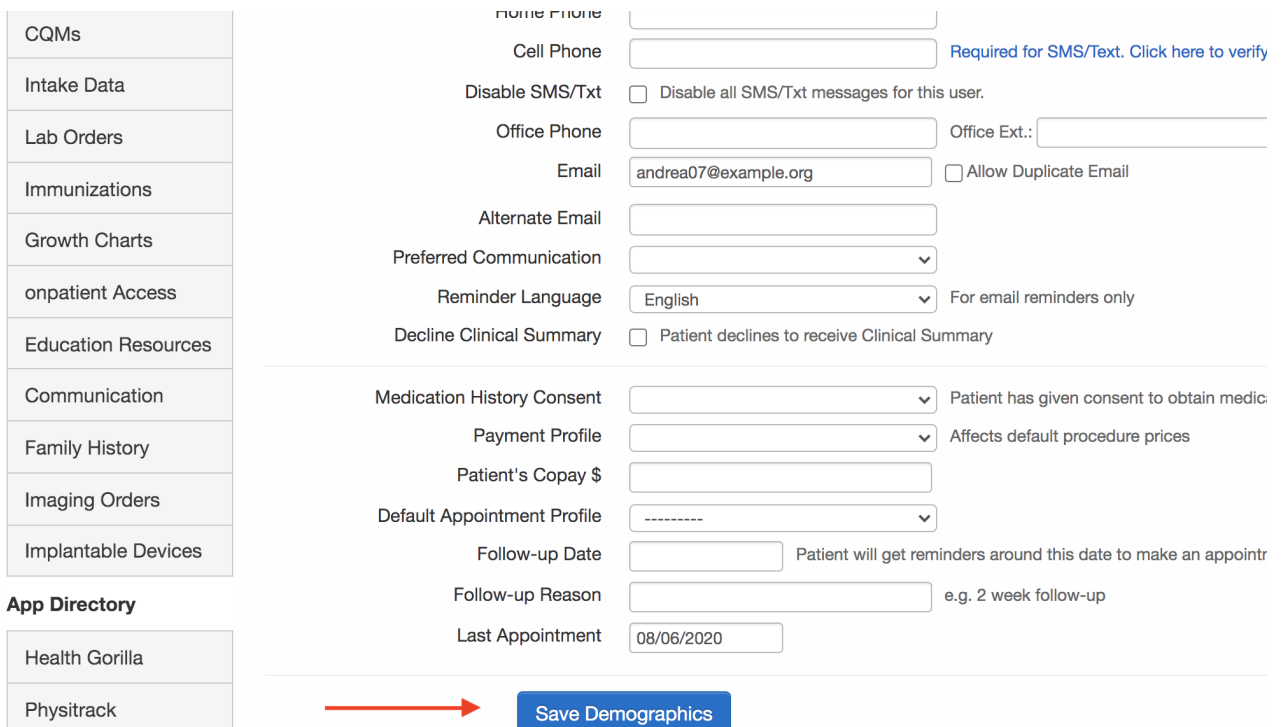
The screenshot shows a navigation menu with two main items: **Patients** and **Reports**. Under **PATIENT**, there is a sub-menu with the following options: **Patient List** (highlighted in blue), **Consent Forms**, **Patient Flags**, **Patient Groups**, **Send Email**, and **Send Referral**.

2. To add a patient, click **+Add new patient**, then enter all necessary fields. As noted on the New Patients page, you can enter all necessary fields for each patient including demographics, insurance information, and billing data.



The screenshot shows the 'Manage your existing patients' interface. It includes a search bar with a dropdown arrow and a 'Search' button. Below the search bar are two buttons: **+ Add new patient** (highlighted in green) and **Update patient (via C-CD A XML)**. On the right side, there are buttons for **Bulk Import**, **QRDA I Import**, **Export (CSV)**, and **Export (C-CD A XML)**. A 'More Filters' button is also present. The page number **PAGE 1 OF 5** is shown at the bottom right.

3. To edit information on existing patients, open the patient chart, edit the necessary fields, and click **Save Demographics** at the bottom of the page.



The screenshot shows a patient demographics form. On the left is a sidebar with various menu items: **CQMs**, **Intake Data**, **Lab Orders**, **Immunizations**, **Growth Charts**, **onpatient Access**, **Education Resources**, **Communication**, **Family History**, **Imaging Orders**, **Implantable Devices**, and **App Directory** (with sub-items **Health Gorilla** and **Physitrack**). The main form contains the following fields:

- Home Phone**: [Text input]
- Cell Phone**: [Text input] [Required for SMS/Text. Click here to verify](#)
- Disable SMS/Txt**: Disable all SMS/Txt messages for this user.
- Office Phone**: [Text input] **Office Ext.:** [Text input]
- Email**: Allow Duplicate Email
- Alternate Email**: [Text input]
- Preferred Communication**: [Dropdown menu]
- Reminder Language**: For email reminders only
- Decline Clinical Summary**: Patient declines to receive Clinical Summary
- Medication History Consent**: [Dropdown menu] Patient has given consent to obtain medic
- Payment Profile**: [Dropdown menu] Affects default procedure prices
- Patient's Copay \$**: [Text input]
- Default Appointment Profile**: [Dropdown menu]
- Follow-up Date**: [Text input] Patient will get reminders around this date to make an appointr
- Follow-up Reason**: [Text input] e.g. 2 week follow-up
- Last Appointment**:

At the bottom of the form is a blue button labeled **Save Demographics**, with a red arrow pointing to it from the left.

For uploading a bulk list of patients click [here](#).

Go to your patient list [now](#).
