Register a New Patient

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Version 21.1

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button**

About

A new chart should only be created after you've already searched for the patient and confirmed there is not already a chart for them. The instructions below instruct on how to register a new patient from the Patient Chart. For more information on registering a new patient while scheduling their appointment, click **here**.

Search For and Add a New Patient

1. Access the Patient Chart by following the path above.
2. Click the **Patient Search** button. The patient search window is displayed.
3. Search for the patient and proceed only if the patient was not located in your search.
4. Click the **New Patient** button. The Demographics window is displayed.
5. Complete the patient's information using the tables below as guides. The tables are broken down by fields that are required to save a chart and those that are additional information about the patient.

> **Note**: Fields that are marked as required will appear inred text on the Demographics screen when creating a new patient's chart. Your practice may have additional required fields, depending on preferences set. You will not be able to save the new chart until all required fields are met.

Required Fields

Field	Description
Last / Suffix	Enter the patient's full last name. A suffix is optional. The characters allowed in this field are: upper or lower case a-z, hyphen (-), apostrophe (*), and/or spaces.
First	Enter the patient's full first name. The characters allowed in this field are: upper or lower case a-z, hyphen (-), apostrophe (*), and/or spaces.
Birth date	Enter the patient's date of birth.
Sex	Click the drop-down to choose from the options: Male, Female, or Unknown.
Primary Address	Enter the patient's address. As a shortcut, skip the City and State fields and enter only the Zip Code. The system will automatically provide the corresponding city and state. Be sure to confirm the accuracy of what was auto-populated for you.
Primary Phone	Enter the patient's primary phone number.
Primary Provider (PCP)	In a single-provider Practice, this field is automatically populated. In a multi-Provider Practice, click the **Address Book** button and select the Provider who will be the patient's Primary Care Provider.

Additional Information

Field	Description

Field	Description
Middle Name	Enter the patient's middle name.
Gender Identity	The default selection in this field is Unknown. To enter the patient's Gender Identity, click the drop-down and choose from the options. If Other is selected and confidential details are needed, enter them as General Notes or in the Problem List with a privacy constraint.
Orientation (sexual)	The default selection in this field is Don't Know. To enter the patient's Sexual Orientation, click the drop-down and choose from the options.
Details	Enter information about the patient's orientation. This field is only available when Other, please specify is selected in the Orientation field. If confidential details are needed, enter them as General Notes or in the Problem List with a privacy constraint.
Language(s)	Select the patient's primary and secondary languages. This is a type-ahead field that holds multiple selections.
County/Country	This code is used for some Immunization Registries. To edit the valid list of counties, navigate to the **Practice Management tab > More button (in Reference Data group) > Vaccine Registry Codes** and select **County** in the drop-down.
Primary phone /Relation	Enter the relationship to the patient for the primary phone number.
Day/Work/Ext/Relation	Enter the day or work number and extension, if applicable, and the relationship to the patient for the Day/Work number.
Cell phone/Relation	Enter a cell phone number and the relationship to the patient.
Email address	Enter the email address for the patient, if applicable.
Emergency Contact	Select the Emergency Contact for the patient. This list is populated with the individuals entered into the Family Contacts section of the patient's chart. If that information has not yet been entered, return to this field once it has been.
VFC Eligibility	This is the patient's eligibility status for the Vaccines for Children Program, based on their insurance. The system default setting is 5: Not Eligible. To select an alternate eligibility status, use the drop-down arrow to select the correct status. This field is automatically populated when the insurance has been added to the patient's record.
Medical home	In a single-location Practice, this field auto-populates. If there are multiple Practice locations, select the location where the patient will primarily be seen.
Team	If the patient is being assigned to a Care Team, as defined by the Practice, select the team using the drop-down. The **Demographic Analysis and Recall report** can be used to find all patients that have been assigned to Teams.
Risk Group	If the patient is considered to be part of one of the practice's Risk Groups, use the drop-down to indicate which Risk Group here. The Demographic Analysis and Recall report can be used to find all patients that have been assigned to Risk Groups.
Alternate ID	If the Practice is converting to OP from another system, their legacy number may be displayed here.
Alt last name	The alternate last name can be used to indicate if a patient has an alias.
Alt first name	The alternate first name should be populated with a patient's preferred first name. Any entry here will display on the Calendar, in the Patient Appointment window, and in the Tracking tab.
Ethnicity	To enter the patient's Ethnicity, click the drop-down and select from the options.

Field	Description
Details (Ethnicity)	Enter Ethnicity details as they are provided by the patient/parent. The details in this field are intended to provide more information on Hispanic or Latino origin. This is a type-ahead field that holds multiple selections. To remove selections, click the corresponding **X**. Clicking the **X** will reset the Ethnicity selection.
Race	The default selection if this field is Unknown. To enter the patient's Race, click the drop-down to select from the options. If Declined to Specify is selected, the other options will be greyed out. If selected in error, deselect and proceed by selecting the correct Race checkbox(es). Once another option is selected, Declined to Specify is greyed out and cannot be selected.
Details (Race)	Enter Race details as they are provided by the patient/parent. The details in this field are intended to provide more information on the racial origin of the patient. This is a type-ahead field that holds multiple selections. As selections are made, the Race will automatically update. To remove selections, click the corresponding **X**. Clicking the **X** will alter the Race(s) selection.
Status	When creating a new record for a patient they will automatically be listed as "Active." The patient is now an active member of the Practice. The **Portal Acct** status indicator is only displayed when the practice is using the Patient Portal. This status reflects the status of the patient's portal account. A **Refresh** button is available to refresh the Portal Acct status, when necessary.

6. *(Optional)* Complete the Patient Preferred Contact Method Information. This is used when a patient is no longer a minor. Contact methods include:
    - No contact
    - Mail Address (not included in the Patient Portal)
    - Home Phone (not included in the Patient Portal)
    - Work Phone (not included in the Patient Portal)
    - Cell Phone (not included in the Patient Portal)
    - Text to Cell
    - Fax (not included in the Patient Portal)
    - Home Email
    - Work Email
7. Click the **Save** button to save the record.

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