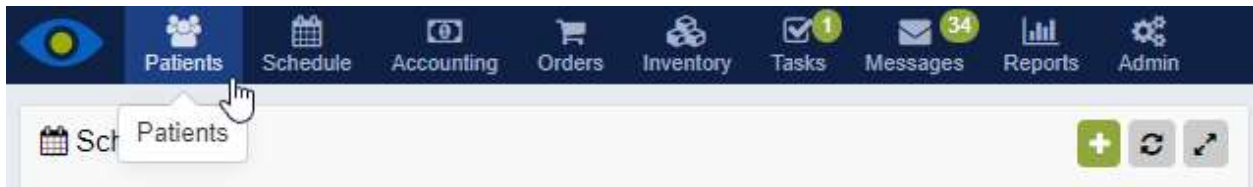
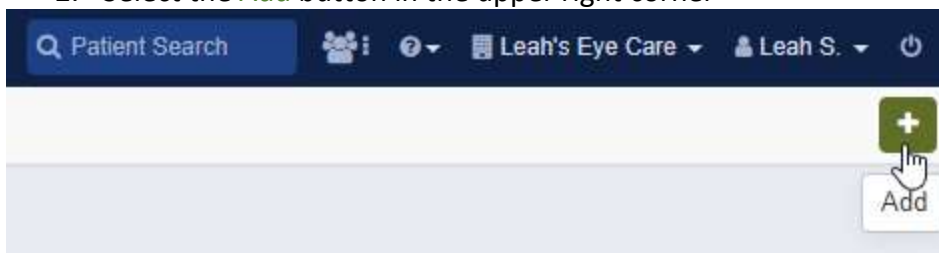


## How to Enter a New Patient

1. Select the Patients module

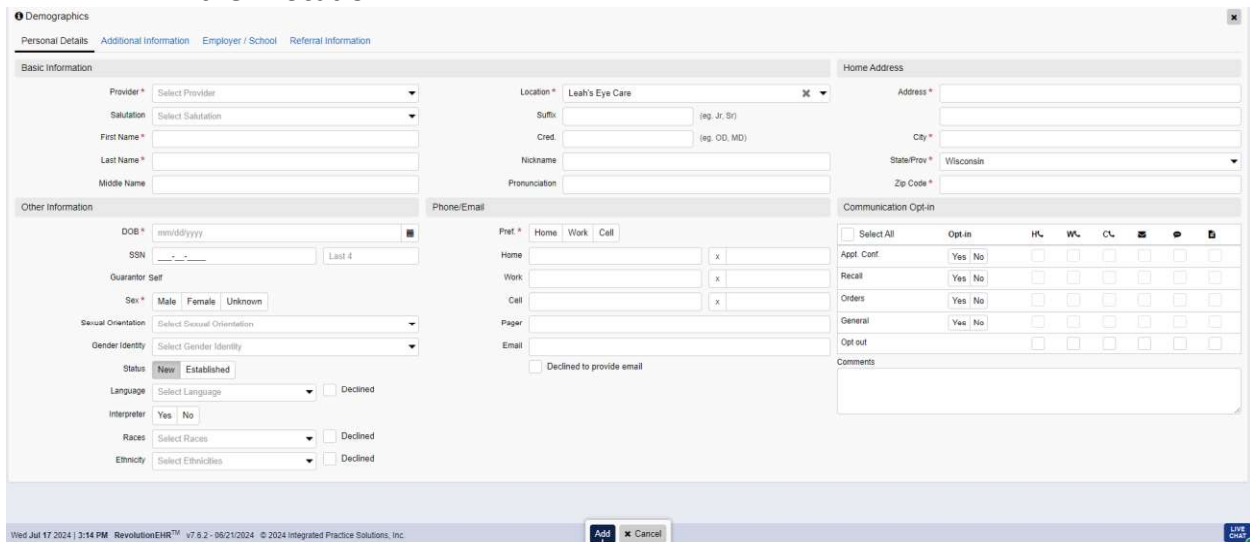


2. Select the **Add** button in the upper right corner



3. Enter all required fields

- a. All required fields will have a red asterisk (required fields include Provider, First Name, Last Name, Location, Address, City, State/Prov, Zip Code, DOB, Sex, and Phone Number) **\*\*If this is a test patient, please use Practice and Training as their Location\*\***



The screenshot shows the 'Demographics' form for a new patient. The form is divided into several sections: Personal Details, Additional Information, Employer / School, and Referral Information. The 'Basic Information' section includes fields for Provider, Salutation, First Name, Last Name, Middle Name, Location, Address, City, State/Prov, and Zip Code. The 'Other Information' section includes fields for DOB, SSN, Sex, Sexual Orientation, Gender Identity, Status, Language, Interpreter, Races, and Ethnicity. The 'Phone/Email' section includes fields for Home, Work, and Cell phone numbers, and an email field. The 'Communication Opt-in' section includes checkboxes for various communication preferences. At the bottom of the form, there are 'Add' and 'Cancel' buttons.

4. Select **Add** at the bottom of the screen to create the patient file