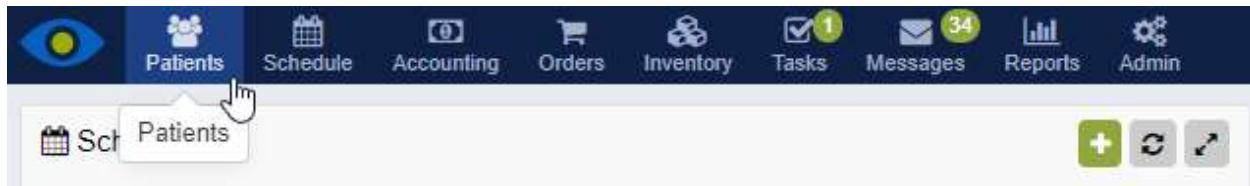
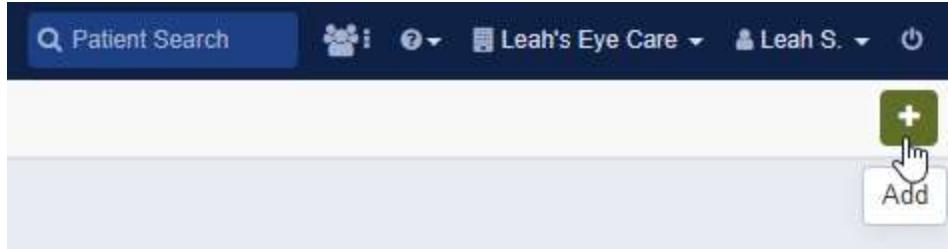


How to Enter a New Patient

1. Select the Patients module

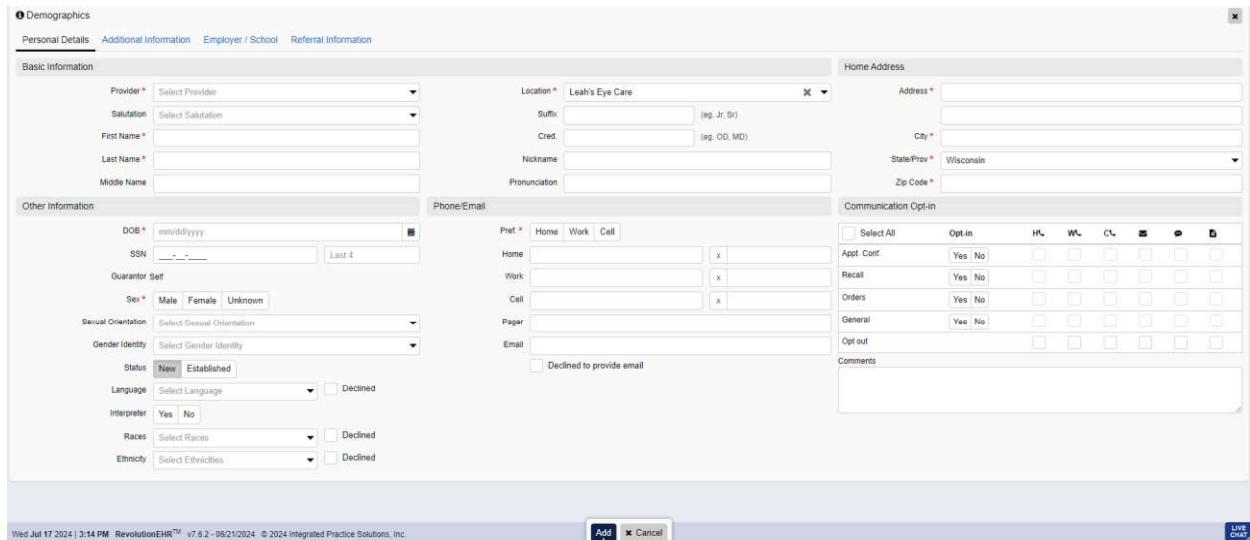


2. Select the **Add** button in the upper right corner



3. Enter all required fields

- 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 form is divided into several sections:

- Personal Details:** Fields include Provider (dropdown), Salutation (dropdown), First Name, Last Name, Middle Name, and Suffix.
- Basic Information:** Fields include DOB (date input), SSN (input), and Gender (radio buttons: Male, Female, Unknown).
- Other Information:** Fields include Sexual Orientation (dropdown), Gender Identity (dropdown), Status (radio buttons: New, Established), Language (dropdown), Interpreter (radio buttons: Yes, No), Races (dropdown), and Ethnicity (dropdown).
- Location:** Fields include Location (dropdown set to Leah's Eye Care), Suffix (input), Cred. (input), Nickname (input), Pronunciation (input), and Address (input).
- Phone/Email:** Fields include Pref. (radio buttons: Home, Work, Cell), Home (input), Work (input), Cell (input), Pager (input), and Email (input). There is also a checkbox for Declined to provide email.
- Home Address:** Fields include City (input), State/Prov (dropdown set to Wisconsin), and Zip Code (input).
- Communication Opt-in:** A grid of checkboxes for various communication preferences (e.g., Select All, Opt in, Recall, Orders, General, Opt out).
- Comments:** A large text area for additional notes.

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