Add Patient Record Quick Reference Guide

Note: Before creating a new record within imMTrax, conduct a broad search to identify any existing records.

imMTrax staff recommends the following two search steps before proceeding with any new record creation:

1. Search using <u>only</u> the first three letters of the First and Last name followed by the wildcard "%."
2. Search using <u>only</u> the Birth Date.

Use the Clear button on the patient search screen to reset your Search. The system will retain your patient search even as you navigate throughout the system.

Steps to Follow:

1. Click Search/Add, located under the Patient panel.

2. Enter First Name, Last Name, and DOB. Click Search. After searching for a patient and no matching records are found, check the box that says "Check here if adding a new patient."

3. Enter all of the **required** information (highlighted in red).

   ➢ For patients 18 years of age or younger, Mother's Maiden Name is highlighted in red but is **<u>not required</u>**.

4. Click Search.

Workflow tip: Skip over the city and state. Entering in the zip code auto-populates the city and state.

5. After clicking the Search button, a message appears with one of the following messages. Click OK.

   ➢ *Before adding, ensure the patient you want to add is not listed in the Patient Search Results.*
   ➢ *This record already exists in the database. An exact match has been found.*
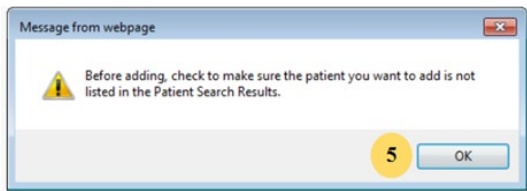
6. If a match is found - select the patient. If the system finds a match, you cannot add a new patient record. If no match is found, click Add Patient.

7. Enter the patient information in the appropriate fields.
- ➢ All fields marked with **red text** are required
    - **i.** For patients, 18 years of age and younger, at least one Guardian First Name is required. **Must select Add before clicking Save to include Guardian First Name in the record.**
- ➢ All fields marked below with a star are recommended fields. (Middle Name, Military Status, Race, Ethnicity, Reminder/Recall Publicity code, *Phone Number* (be sure to click the **add** button if adding a phone number)

8. Click the **Primary** checkbox in the Address section and click the **Add** button (next to the checkbox).

9. Click the Save button.