

Edit Patient Demographics Quick Reference Guide

Steps to Follow:

1. Click **Search/Add**, located under the **Patient** menu.
2. Use the search fields to search for the patient. imMTrax staff recommends one of the following two searches:
 - Search using only the first three letters of the First and Last name followed by the wildcard "%."
 - Search using only the Birth Date.
 - *imMTrax Tip:* Use the % as a wildcard to substitute for any letter in a patient's name when you do not know the exact spelling of the patient's name. (You must type the % symbol in both name fields to use this feature).
3. Click the patient's name to open the demographics section.



- If the patient search result displays in red, the patient has either consent status of denied or undetermined.

4. Select the **Edit** button (located at the bottom of the patient demographics screen).

5. Edit or update information as needed.



Note: Certain demographic fields impact other parts of the system if a certain value is selected. (fields marked with a star)

- **Consented:** If the patient's consent status is "undetermined" or "no," the patient will not appear on Reminder/Recall outputs. If the patient's consent status is "no," the patient will not be included in Reminder/Recall outputs, Patient Lists, or Reports.
- **Patient Phone Number:** One listed phone number must be designated "Primary" for any listed phone number to be an available contact method for Reminder/Recall outputs. **It's best practice to capture a patient phone number.**
- **Organizational Level:** If the patient status is set to Inactive, the patient will not be automatically included in Reminder/Recall or Reports.
- **Reminder/Recall Publicity Code:** to include patients in any reminder/recall, select "Reminder/Recall- any method" or leave as "—select—." The patient will not be included if other values are selected for the R/R Publicity Code field.

6. Select the **Save** button.

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Note: Expand or collapse fields on the demographics screen using these buttons. + -