# Edit Patient Record Quick Reference

Note: The workflow steps below walk through how to update patient demographic, address, insurance, and contact email. Please note that patients that have registered for multiple clinics may have more than one record. Changes can be made before or after a clinic. It is recommended you make changes before you send clinic data over to imMTrax.
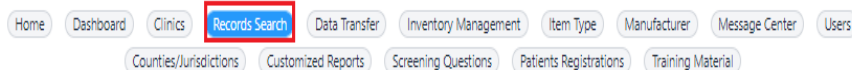
Steps to Follow:

1. Open patient records search through one of the methods below
   a. Click the Find a Record button from the PrepMod main menu
   b. Click the Records Search button from the PrepMod top menu
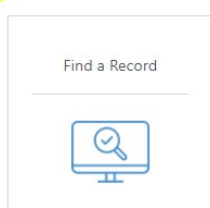
2. Use the search fields to input the patient's name, DOB, or Patient ID number, and click the Search button.

3. When you have found the correct patient record click the **Edit** button

4. Make the necessary updates to the patient record. The following info can be updated

   a. Patient Name
   b. Patient Ethnicity
   c. Patient Phone Number
   d. Patient Email Address
   e. Patient Date of Birth
   f. Address
   g. Insurance Info

5. Once you have made the necessary changes click the **Save and Continue** button