

Creating New Patients

A patient remains "New" until they checkin to their first appointment. Or you uncheck the "new" in their profile. "New" patients can be restricted in various ways in their portal.

There are three places you can create new patients.

From any page go to Patients : New Patient. OR

From the Patients: All Patients page use the "New Patient" button at the top right. This will open a new modal window form for creating a new patient.

Add A New Patient

First Name

Middle Initial

Last Name

Email Address / Username

User Password
Write This Down!, you will not be able to see it once created.

Confirm Password

Phone

Birthday

Also from the patients list page you can import a group of patients by uploading a CSV (comma delimited values) file. The popup modal window explains how to format the CSV.

Import Patients

☐ Ignore First Row

Example of CSV data
Download Sample CSV

Ref#	Pronoun	First	Middle	Last	Nickname	email	phone	cell	street add	city	state	zip	birthdate
123	She	Jane	A	Doe	Janie	jan@mail.com	(615)555-1212	(615)555-1212	123 Main Street	Anytown	NY	10010	04/25/1962
123	She	Jane	A	Doe	Janie	jan@mail.com	(615)555-1212	(615)555-1212	123 Main Street	Anytown	NY	10010	04/25/1962

Download all patients in your database from the Patients : All Patients page. Click the download icon to the top right of the patients listing table.

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