

# 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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