

Edit Patient Demographics Quick Reference Guide

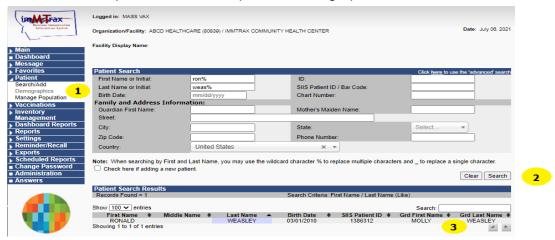


Steps to Follow:

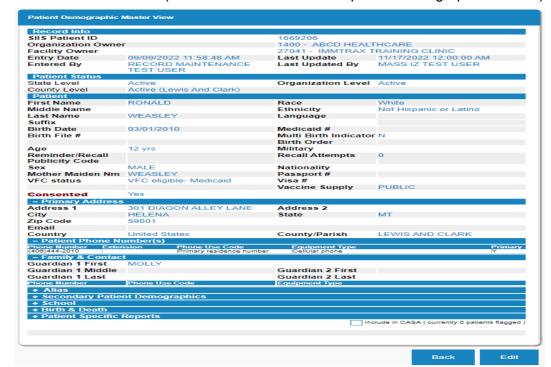
- 1. Click Search/Add, located under the Patient menu.
- **2.** Use the search fields to search for the patient. imMTrax staff recommends one of the following two searches:
 - Search using only the first three letters of the First and Last name followed by the wildcard "%."
 - Search using only the Birth 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.
- Select the Edit button (located at the bottom of the patient demographics screen).

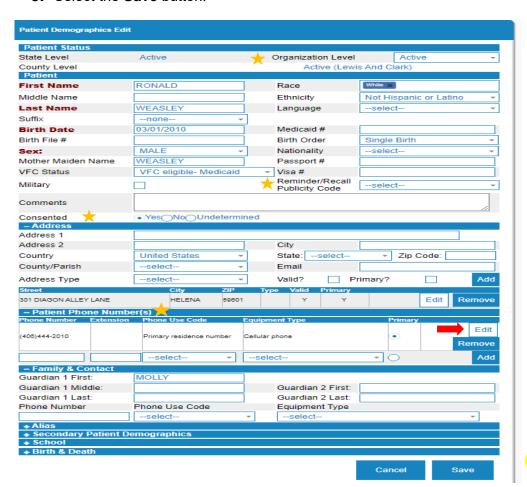


5. Edit or update information as needed.



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.