

# How to Add a New Patient to Your Practice

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## How to Add a New Patient to Your Practice

There are two ways to add a patient to your practice.

### Patient Tab

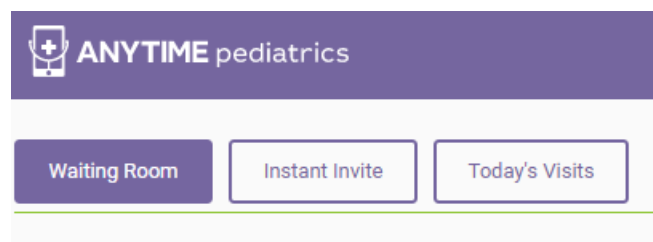
- When a practice creates the patient's account, it will automatically register their profile to your practice.
- Click on the patient tab at the top of your screen, and select patient
- Select "Add New Patient"

A screenshot of the software interface showing search fields for Patient and Practice. The Patient section has input boxes for Patient First Name, Patient Last Name, Parent Phone Number, and Parent Email Address, followed by a Search button and a green 'x' icon. The Practice section has a dropdown menu set to 'All' and an 'Add New Patient' button. A yellow arrow points to the 'Add New Patient' button.

- Enter the patient's information and click "Create Patient Record"
  - The patient will then receive an email in their inbox with instructions on how to set up their password.
  - The practice can proceed to schedule appointments with the patient as well as edit their information.

### Instant Invite

- Click on Instant Invite from your homepage



- Click Add New Patient

Waiting Room
Instant Invite
Today's Visits

Add New Patient

Practice	First Name	Last Name	DOB	Account First Name	Account Last Name	Instant Invite
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- Fill out the patient's information and select Create Patient Record and Send Invite

Add Patient

Directions:

1. The Phone Number or Email address is required.You may enter both the Email and Phone Number.  
2. The Patient First Name, Patient Last Name, and Date of Birth are Required.  
3. The Parent First Name and Parent Last Name is optional.  
4. The Create Patient Record button will save the information and send the invite.

Practice

Big Heart Pediatrics

Clinician

Email

And/Or

Parent Phone Number

Patient First Name (Required)

Patient Last Name (Required)

MM/DD/YYYY (Required)

Parent First Name (Optional)

Parent Last Name (Optional)

Cancel

Create Patient Record and Send Invite

- Your patient will receive a message letting them know their account has been created. The patient will be added to your practice.