New Patient Registration for Clinical and Clerical Staff
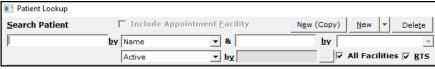
eClinicalWorks Ambulatory **JOB AID**
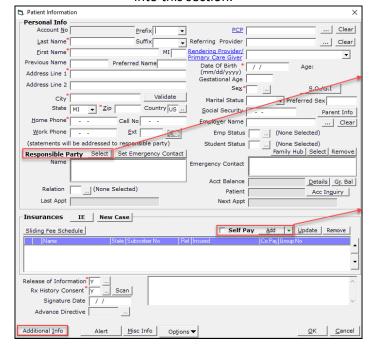
New Patient Registration

1. Click on the **Patient Lookup** icon (Sherlock) to open the Patient Lookup screen.
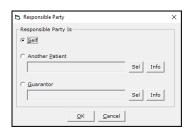   a. Search for the patient to determine if they already exist in the system.

2. New (Copy) vs. New vs. New Caret from the Patient Lookup screen.
   a. The **New Copy** button will copy some demographic information from another patient for quicker registration (i.e., address, insurance information, emergency contacts).
   b. The **New** button opens a blank Patient Information screen.
   c. The **Caret** to the right of the **New** button gives the option of scanning the patient's identification (with or without a photo). eCW will input demographic information into the Patient Information screen for quicker registration.

3. Fill in all required fields in the Patient Information screen.
   a. Fields with a red asterisk are mandatory. All others are suggested.
   b. To select the patient's guarantor/responsible party:
      i. Click **Select** next to Responsible Party.
      ii. Select Self, Another Patient, or Guarantor radio button.
         1. Another Patient and Guarantor will allow those lists to be searched, or to add a new party to the list.
   c. To select the patient's insurance:
      i. Click the box next to Self Pay for no insurance or **Add** to select the insurance company from the list. The **Caret** next to Add allows the insurance card to be scanned and information to populate into this section.
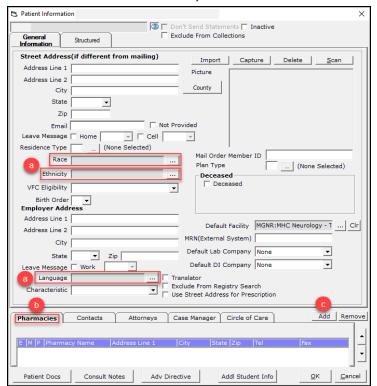
4. Click on the **Additional Info** button to open the second page of patient information.
    a. Fill in the Race, Ethnicity, and preferred Language.
    b. To add the patient's preferred pharmacy, click on the **Pharmacies** tab.
    c. Click the **Add** button.
    d. Select Pharmacy and click **OK**.

5. Click **OK** on the additional info page and again on the first patient info page to complete the registration.