How to Add a New Patient in ECW 11e

From the Resource schedule or the provider schedule, choose an appointment time and double click on the time. There is the option of right clicking to get the dropdown shown here, but this does not reliably pull all the appropriate information – so don't use this method.

Type the provider name, then “new patient”.

Fill in the details – type of visit, reason for visit, provider name and resource.
Now choose the visit and right click to get the dropdown menu. Choose “View Specialty Forms”.

Now choose “PRIMA CARE PATIENT DEMOGRAPHIC”.

Fill out the form, and hit “Save”.
Go back to the schedule and open the visit, then click click on “Hub”.

Click on the dropdown next to “Action” and choose “New Action”.

Choose “Merge Template”.
Choose “New Patient”. This pulls in the necessary information so the action gets to the right people who will complete the process of adding the patient to ECW.

Add your name/timestamp.

This merge is also SUPPOSED to attach the demographic form to the action, but as of 4/23/19, it attaches a BLANK form.

One further step is to go to “Attachments” and attach the form you just completed to this action.

DO click on "Add" to add the form you just filled out

Ignore this attachment - it is a blank form
You can view the form by clicking on the eye to the right if you aren’t sure that you are attaching the correct form. Make sure to click the box to the left of the form and then hit “OK”.

Go back to the schedule and open the visit – click on “Info”.

Make sure as much information is entered as possible, including phone numbers, email, pharmacy, emergency contact, etc.
When the patient has been officially added to ECW, you will get the action back in your “T” jellybean.

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