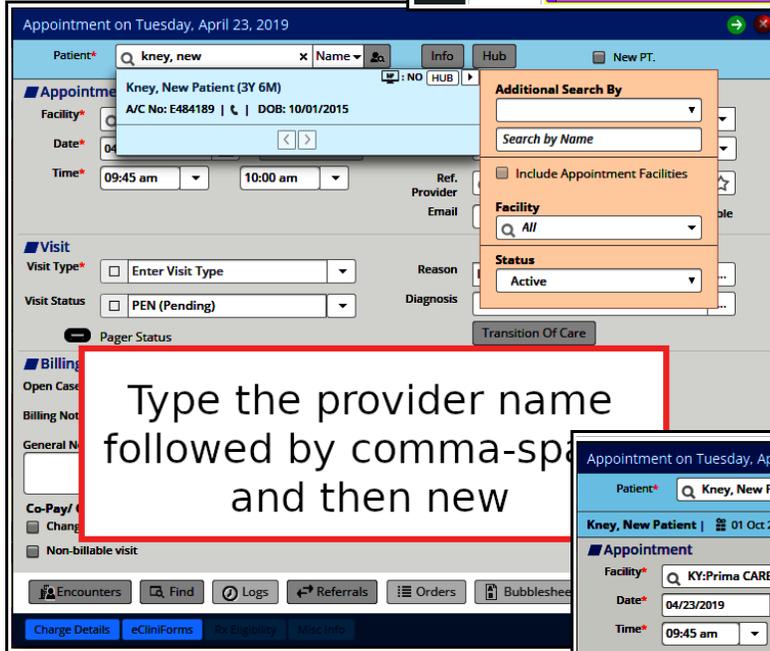
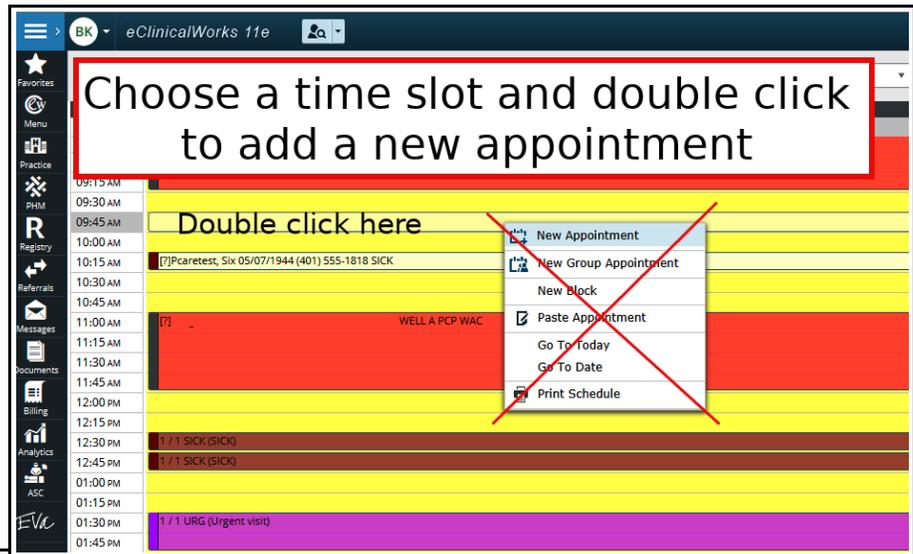
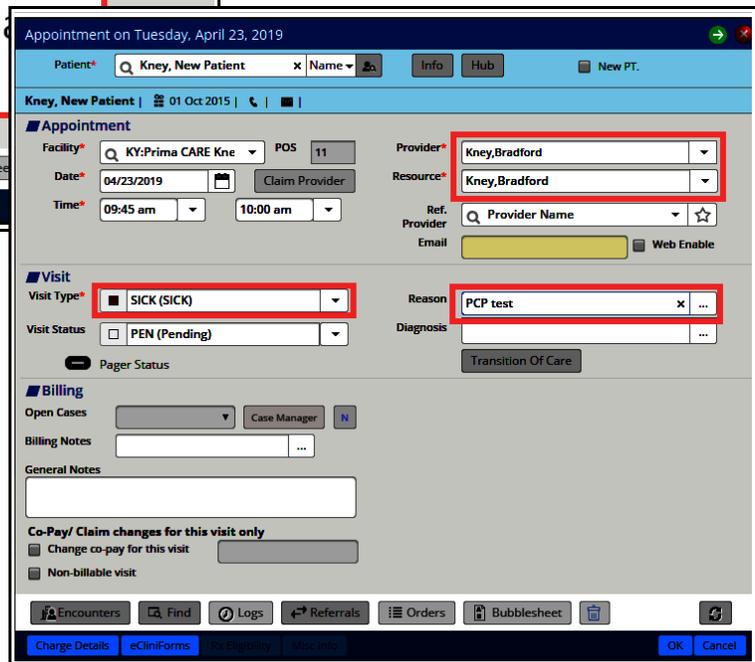


# How to Add a New Patient in ECW 11e

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”.



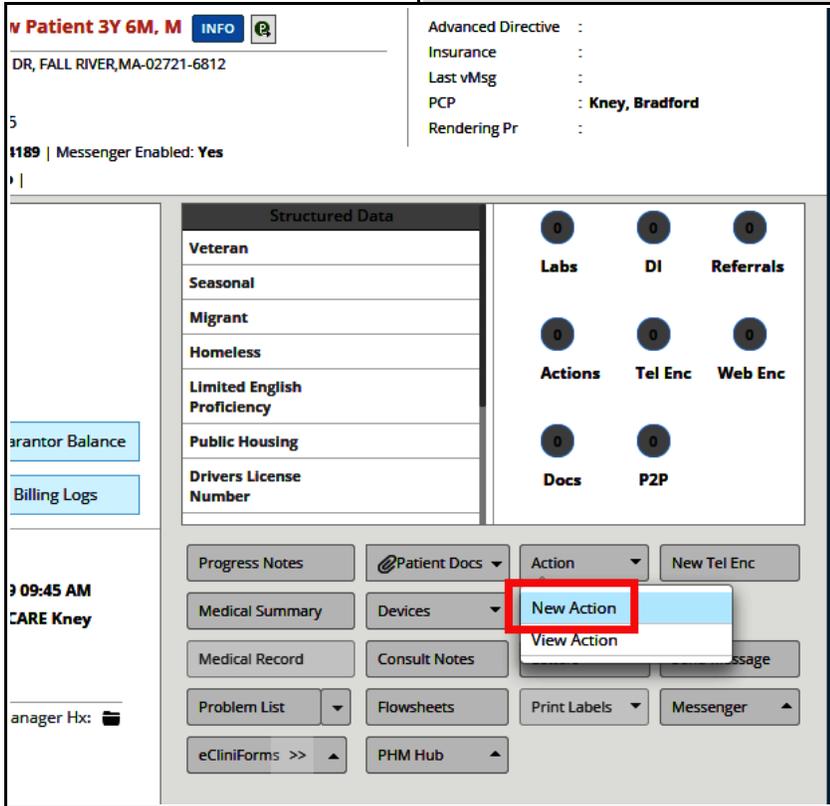
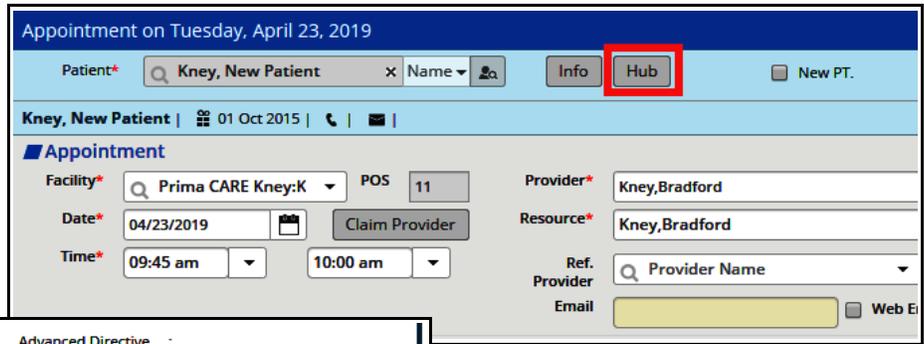
Fill in the details – type of visit, reason for visit, provider name and resource.

Now choose the visit and right click to get the dropdown menu. Choose “View Specialty Forms”.

Now choose “PRIMA CARE PATIENT DEMOGRAPHIC”.

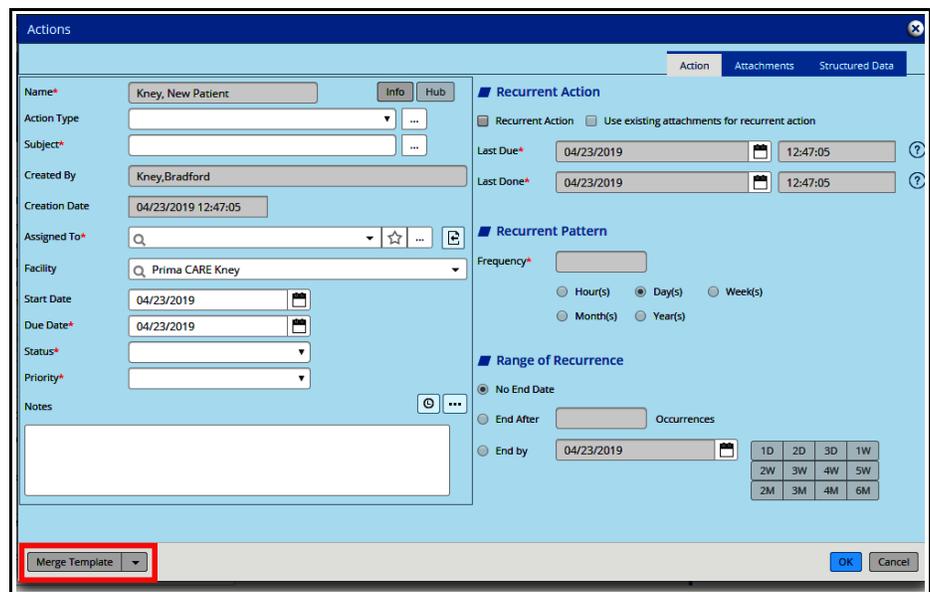
Fill out the form, and hit “Save”.

Go back to the schedule and open the visit, then click on “Hub”.



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

Choose “Merge Template”.



**Actions**

Action View ▸ Action Template

Search:

<input type="checkbox"/>	Action Template Name
<input type="checkbox"/>	Update/change Insurance
<input type="checkbox"/>	Dartmouth
<input checked="" type="checkbox"/>	<b>New Patient</b>
<input type="checkbox"/>	MVA
<input type="checkbox"/>	Death Notice

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.

**Actions**

Action Attachments Structured Data

Name\* Kney,New Patient Info Hub

Action Type Appointments ...

Subject\* New Patient ...

Created By Kney,Bradford

Creation Date 04/23/2019 13:42:13

Assigned To\* Luisi,Sharon x ☆ ...

Facility Prima CARE Kney

Start Date 04/23/2019

Due Date\* 04/23/2019

Status\* In Progress

Priority\* High

Notes

Kney,Bradford 04/23/2019 14:00:33

Recurrent Action

Recurrent Action  Use existing attachments for recurrent action

Last Due\* 04/23/2019 00:00:00 ?

Last Done\* 04/23/2019 00:00:00 ?

Recurrent Pattern

Frequency\* 0

Hour(s) Day(s) Week(s)

Month(s) Year(s)

Range of Recurrence

No End Date

End After 0 Occurrences

End by 04/23/2019

1D 2D 3D 1W  
2W 3W 4W 5W  
2M 3M 4M 6M

Merge Template

OK Cancel

**Actions**

Action Attachments Structured Data

Encounters Add Remove

Date	Reason	Preview

Documents Add Remove

Document Name	Document Description

Specialty Forms

Form Name	Form Type
PRIMA CARE PATIENT DEMOGRAPHIC	Custom Forms

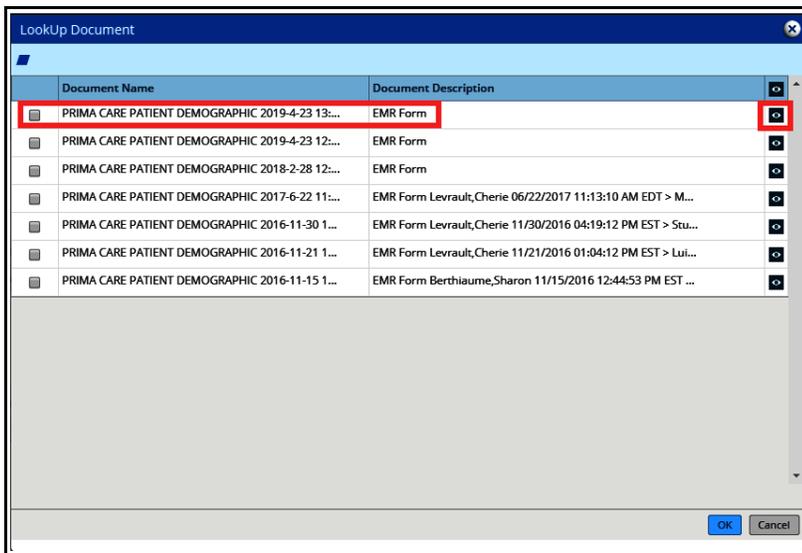
Merge Template

OK Cancel

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

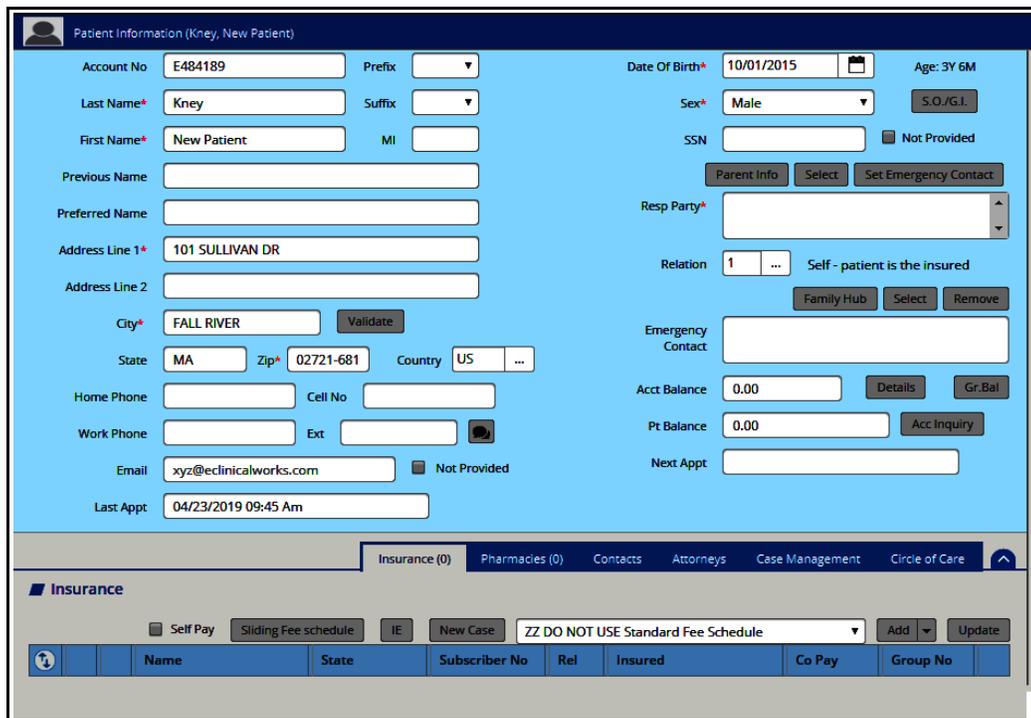
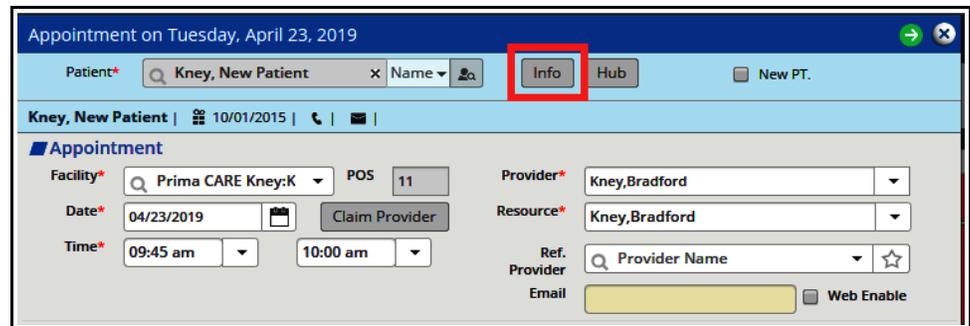
Ignore this attachment - it is a blank form

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



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.

Brad Kney, MD  
April 23, 2019