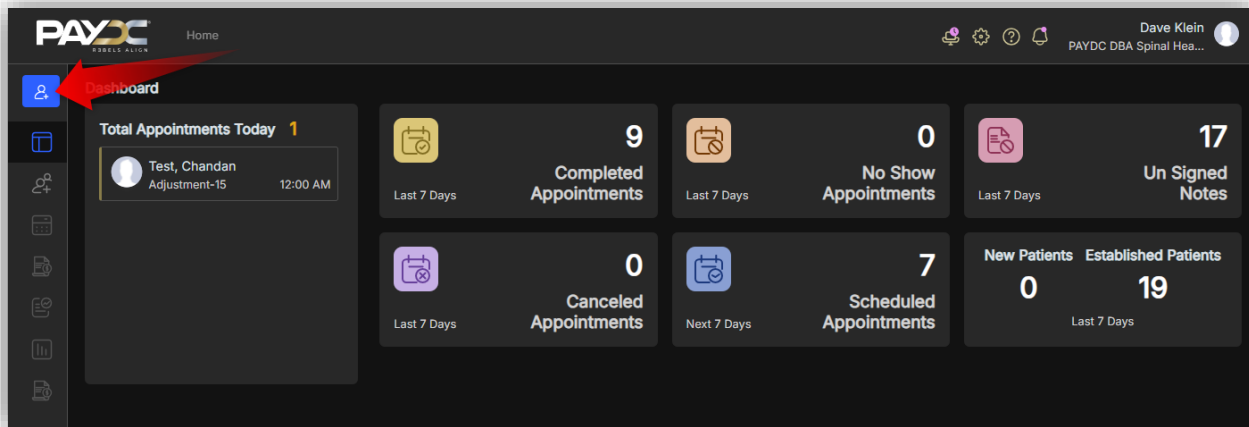
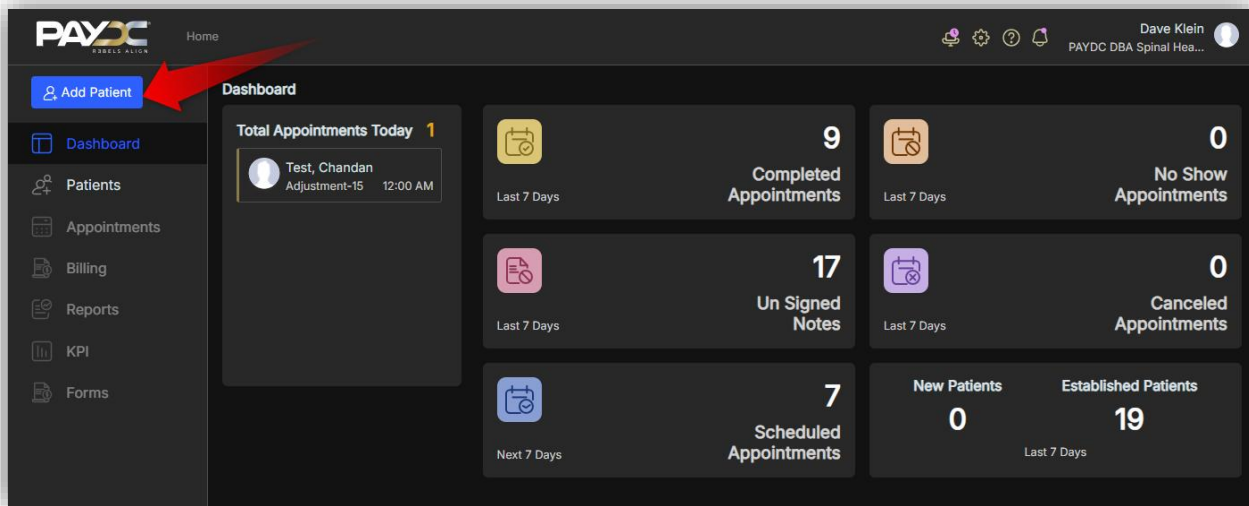


Adding a New Patient

1. The Add Patient button can be accessed from the Main Menu on the left.



2. After clicking “Add Patient,” complete required fields (Frist Name, Last Name, Gender, Date of Birth, Condition Related To) and click Save.

The screenshot shows the PAYOC Patient Portal interface. The 'Add Patient' form is open, and the 'Send Welcome Email' toggle is turned on. The 'Condition Related To?' section is expanded, showing options for 'Auto Accident (Occupant or Pedestrian)', 'Accident in Someone Else's Home', 'Other Accident', 'Work Related Accident', 'Accident on Premises of Someone Else's Business', and 'Non Accident'. The 'Save' button is highlighted with a red arrow.

3. To send a Welcome Email to the patient, be sure to add patient email address, and toggle the Send Welcome Email option in the upper right and corner of the screen.

This will invite the patient to login to the Patient Portal to complete the initial intake information. Your patient will enter things such as demographic details, contact information, health history and a condition specific health questionnaire.

4. You can also choose to send a copy of the email to your office email by using the toggle to the right of the Welcome Email toggle. Click Save.

The screenshot shows the PAYOC Patient Portal interface. The 'Add Patient' form is filled out with patient details: First Name 'Carol', Middle Name 'Fancy', Last Name 'Fancy', Gender 'Female', Date of Birth '09/01/2000', Marital Status 'Single', Email Address 'carolhasfancypants@abs.com', and Primary Phone Number. The 'Send Welcome Email' toggle is turned on, and the 'Send Copy to Office' toggle is also turned on. The 'Condition Related To?' section is expanded, showing options for 'Auto Accident (Occupant or Pedestrian)', 'Accident in Someone Else's Home', 'Other Accident', 'Work Related Accident', 'Accident on Premises of Someone Else's Business', and 'Non Accident'. The 'Save' button is highlighted with a red arrow.

5. After saving, click “OK” to return to the previous screen or “Continue to Demographics” to continue adding additional patient information or move to the Patient Dashboard.

The screenshot displays the PAYOC Patients management interface. A success message is shown in a modal window, indicating that a patient has been successfully added. The message includes a green checkmark icon and the text: "Success Patient Sally Fancy has been successfully added." Below the message are three buttons: "Patient Dashboard", "Continue to Demographics", and "Ok". The background shows a list of patients with columns for Patient Name, Nick Name, DOB, Gender, Patient ID, Primary Phone, Email Address, Status, and Action. The list includes patients like Aaban, Lilly; Aaron, Glassman; Acevedo, Erin; Adams, Ana; Adams, Felicia; Adams, Fred "DME"; Adams, Freha; Adams, Grant; Adams, Greta; Adams, Jeff; Adams, Lynn; Adams, Susan; Adams, Tiffany; Adams, Yolanda; and Adamson, Andy. The interface also features a sidebar with navigation options like Add Patient, Dashboard, Patients, Appointments, Billing, and Reports. The top right corner shows the user's name, Jane Doe, and the Spinal Health Clinic logo.

Patient Name	Nick Name	DOB	Gender	Patient ID	Primary Phone	Email Address	Status	Action
Aaban, Lilly		08/01/1988	Female	3075122		test@pdc.com	Active	...
Aaron, Glassman		06/02/1980	Male	3931300	112223333		Active	...
Acevedo, Erin		05/01/1999	Female	3182817	(310) 947-1197	erinacevedo@gmail.com	Active	...
Adams, Ana		01/01/1977	Female	2302293		ana@psd.com	Active	...
Adams, Felicia		01/01/1977	Female			felicia@pdc.com	Active	...
Adams, Fred "DME"	DME	01/01/1977	Male		(768) 876-8767	fredt@pdc.com	Active	...
Adams, Freha		01/01/1977	Female			freha@pdc.com	Active	...
Adams, Grant		01/01/1977	Male		(675) 858-7585	grant@pdc.com	Active	...
Adams, Greta		01/01/1966	Female	2293884	(875) 785-7885	greta@psyc.com	Active	...
Adams, Jeff		01/01/1967	Male	2372222		jeff@pdc.com	Active	...
Adams, Lynn		01/01/1977	Female	2505251	(586) 586-7675	lynn@pdc.com	Active	...
Adams, Susan		01/01/1977	Female	2284192	(657) 858-7567	susana@pdc.com	Active	...
Adams, Tiffany		01/01/1977	Female	3053877		tiff@pdc.com	Active	...
Adams, Yolanda		01/01/1977	Female	2358314	(658) 587-6785	yolanda@pdc.com	Active	...
Adamson, Andy		01/01/1977	Male	3718852		andy@pdc.com	Active	...

6. Continuing to Patient Demographics, you can finish adding patient identification information like, nickname, marital status and resend the Welcome Email if necessary. Remember to Save in the bottom right corner.

The screenshot shows the 'Patient Demographics' form for 'Fancy, Sally - 03/18/1965'. The form is divided into several sections. The 'Patient Identification Info' section includes fields for First Name, Middle Name, Last Name, Suffix, Nick Name, Account No./MRN, Primary Provider, Date of Birth, Gender, Height, Weight, Social Security No., Driving License No., Primary Email, Primary Phone No., Preferred Language, Race, Select Race, Ethnicity, Marital Status, Sexual Orientation, Gender Identity, and Handedness. The 'Attorney Information' section includes fields for Name, Phone Number, Address, and Email. The 'Will / Does Patient Have an Authorized Representative?' section includes radio buttons for Yes, No, and Not Sure. Red arrows point to the 'Nick Name' field, the 'Send Welcome Email' toggle, and the 'Save' button at the bottom right.

7. Patient Contact Details stores patient address, phone numbers, etc. We can also set notifications preferences here for appointment reminders—either via email or text message.
8. Parent/Guardian and Spouse can be entered if this information is required for insurance billing. Be sure to Save at the bottom right hand side of the screen after any additions.

The screenshot shows the 'Patient Contact Details' form for 'Fancy, Carol - 09/01/2000'. The form is divided into several sections. The 'Current Home Address' section includes fields for Address Line 1, Address Line 2, City, State, ZIP Code, Township, Country, and Is PO Box. The 'Communication' section includes fields for Primary Phone, Mobile Phone, Home Phone, and Primary Email. The 'Notification' section includes radio buttons for Email and Text, a dropdown for Preferred Time, and a text input for the email address. The 'Emergency Contact Information' section includes radio buttons for Spouse, Authorized Representative, and Other. Red arrows point to the 'Patient Contact Details' tab, the 'Current Home Address' section, and the 'Notification' section.

9. If you decide to come back later to add patient information, you can continue to add/modify patient data by clicking “Edit” from the patient dashboard.

PAYDC PHYSICIAN ACCESS Home / Patients / Fancy, Carol Jane Doe Spinal Health Chirop... - 6434

Add Patient

Dashboard Patients Appointments Billing Reports

Fancy, Carol - 09/01/2000

Patient Dashboard Insurance Details File Cabinet Payment Details Health History Questionnaire Pre-Filled Forms

Patient Information

Fancy, Carol Active
09/01/2000 | 25 | Female
Patient Balance: \$0

Account Number: -- Patient ID: 4325452

Phone Number: -- Email: carolhasfancypants@abs.com

Insurance Details

[Self Pay](#)

Appointments

Next Appt: N/A

Current Appt: N/A

Last Appt: N/A

Quick Actions

Patient Payment

Create New Claim

Patient Ledger

Sticky Note

Cases [+ New Case](#)

Case ID	Category	Date	Provider	Status	Notes	Actions
No records available.						

0 - 0 of 0 items