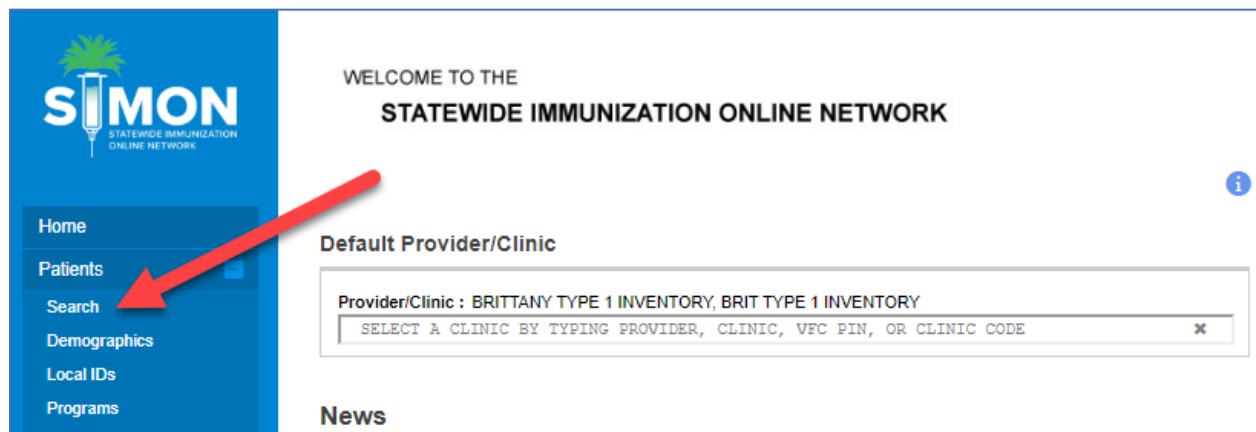


Searching for and Creating Patients/Updating Demographics

This step by step guide shows how to search for a patient in SIMON and add a new patient if they do not exist in the system. You can update the demographics when you've selected an existing patient and the demographics need to be completed for a new patient. Selecting a patient is important to utilize many functions in SIMON.

1. Begin by selecting the "Search" option under the Patients module on the left of the screen.



2. Even if you know a patient is new to the clinic, you must search for them in order to reduce duplicates in the system. Begin with the first two letters of the first and last name.

Patient Search i

T
Links

Search Criteria




| | | | |
|---------------------------------|---------------------------------|----------------------|---|
| Patient ID | Identifier Type | Identifier Value | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Last Name | First Name | Middle Name | DOB |
| <input type="text" value="TW"/> | <input type="text" value="MA"/> | <input type="text"/> | <input type="text" value="MM/DD/YYYY"/> |
| | | | Gender |
| | | | <input type="text"/> |


Previous Criteria
Clear
Search

Info: To minimize the creation of duplicates and aid in the identification of existing duplicates, please initially search for your patient using the first two letters of the first and last name and the date of birth. If a duplicate is found, please notify the helpdesk.

- If you see the patient you're searching for then select the "Demographics" button to the right of the patient information and skip to step 6.


Search Results - 1 record(s)

| ID | Name | Gender | DOB | | Action |
|---------|--|--------|------------|--|----------------|
| 1054198 | CHESNEY, KENNY M 1000 SW JACKSON ST TOPEKA, KS 66612 | M | 05/18/2018 |    | Demographics ▾ |




- To create a new patient, scroll to the bottom of the results and select "New Patient".

Search Results - 0 record(s)

 There are no patients that match your search criteria.

You may add a new patient by clicking the 'New Patient' button.

[New Patient](#)



- The minimum requirements for creating the new patient include last name, first name, date of birth and gender. Complete the fields and click "Create".

Patients New

Click "Create" to create a new patient. 

Add

| | | | |
|---|-----------------------------------|----------------------|-------------------------------|
| Last Name * | First Name * | Middle Name | Generation |
| <input type="text" value="TWAIN"/> | <input type="text" value="MARK"/> | <input type="text"/> | <input type="text" value=""/> |
| DOB * | Gender * | | |
| <input type="text" value="08/09/2010"/> | <input type="text" value="MALE"/> | | |
| Mother Maiden | Mother First | | |
| <input type="text"/> | <input type="text"/> | | |

 [Create](#)

- Now you should see the demographics page for either a new patient or an existing patient. Required fields are marked with red asterisks (*). Complete demographics as thoroughly as possible.

TWAIN, MARK ID: 1055013 DOB: 08/09/2010 AGE: 9Y 1M 25D GENDER: M

Patient Demographics Cancel | ↑ | Links | ⚙ | Update

Edit

[Patient Info](#) | [Primary Contact](#) | [Alias](#) | [Health Ins](#) | [Contact Info](#) | [Address](#) | [Race/Ethnicity](#) | [Birth Info](#)

Patient Information

| | | | |
|------------------------------------|---|----------------------|----------------------|
| Last Name * | First Name * | Middle Name | Generation |
| <input type="text" value="TWAIN"/> | <input type="text" value="MARK"/> | <input type="text"/> | <input type="text"/> |
| Gender * | DOB * | | |
| <input type="text" value="MALE"/> | <input type="text" value="08/09/2010"/> | | |

- Patient Eligibility is related to the funding they qualify for in order to receive their necessary vaccines and will impact your ability to administer vaccines that are related to specific funding sources. Select the appropriate option:

Patient Eligibility *

- (1) IS ENROLLED IN MEDICAID
- (14) SPECIAL PROGRAMS ELIGIBILITY
- (2) DOES NOT HAVE HEALTH INSURANCE - UNINSURED
- (3) AMERICAN INDIAN OR ALASKAN NATIVE
- (4) IS UNDERINSURED
- (5) NOT VFC ELIGIBLE
- (6) ENROLLED IN STATE CHIP PROGRAM - NOT VFC ELI
- (7) VFC ELIGIBLE (LOCAL SPECIFIC ELIGIBILITY)
- (9) VFC ELIGIBILITY NOT DETERMINED/UNKNOWN

Pr **ter Needed?**

First Na

- For patients under the age of 18, a primary contact is required.

Primary Contact

| | | | | |
|----------------------------|----------------------|----------------------|----------------------|----------------------|
| Relationship Type * | Last Name * | First Name * | Middle Name | Generation |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

- If the patient's address is out of state, you'll fill in the "Out of State City" and "Out of State County" but leave the "City" and "County" blank.

Address is Unavailable or Temporary Do Not Include Patient in Reminder/Recall

Mailing Address

Street # * Prefix Street Name * Type Suffix Unit # P.O. Box

City * Out of State City County * Out of State County

Leave Blank DENVER Leave Blank DENVER

State * Country Zip Code *

99999-9999

- If the physical address is the same as the mailing address, use the "Copy Mailing Address to Physical Address" button.

Copy Mailing Address To Physical Address Clear Mailing Address

Copy Physical Address To Mailing Address Clear Physical Address

Physical Address

Street # * Prefix Street Name * Type Suffix Unit # P.O. Box

City * Out of State City County * Out of State County

State * Country Zip Code *

99999-9999

- Click "Update" at the top of the page to save.

TWAIN, MARK ID: 1055013 DOB: 08/09/2010 AGE: 9Y 1M 25D GENDER: M

Patient Demographics ? i

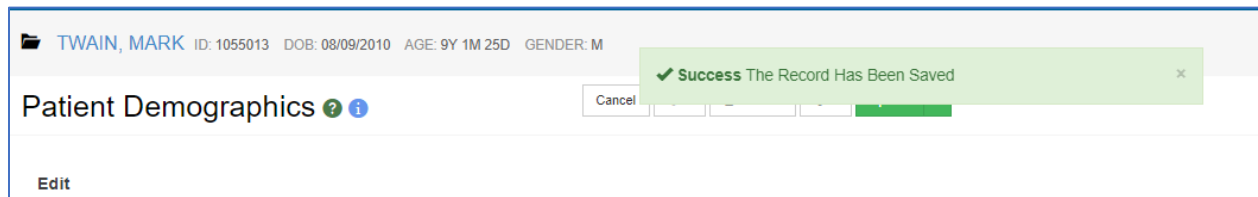
Cancel T Links Settings Update

Edit

Patient Info | Primary Contact | Alias | Health Ins | Contact Info | Address | Race/Ethnicity | Birth Info

Patient Information

12. If you see a message stating an item is required, ensure the required fields are accurately completed until you get a “success” message.



The screenshot shows a patient record form for **TWAIN, MARK** with ID: 1055013, DOB: 08/09/2010, AGE: 9Y 1M 25D, and GENDER: M. The form title is **Patient Demographics**. A green success message box is overlaid on the form, stating: **✓ Success The Record Has Been Saved**. Below the form title, there is an **Edit** button. A **Cancel** button is also visible near the success message.