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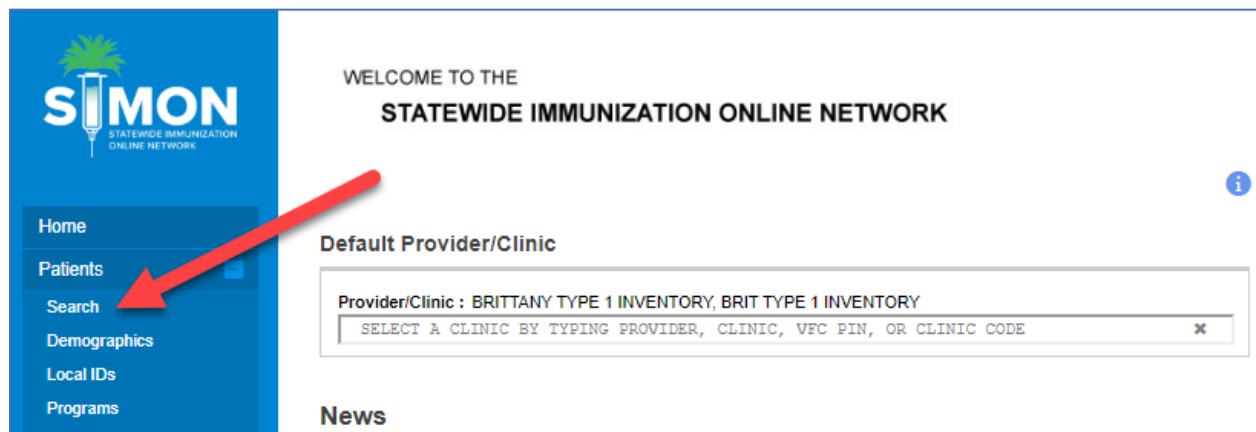
2. Even if you know a patient is new to the clinic, you must search for them in order to reduce duplicates in the system. Begin with the first two letters of the first and last name.

3. 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	▾

4. 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 |

5. 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.   ℹ

Add

Last Name *	First Name *	Middle Name	Generation
TWAIN	MARK		▾

DOB *	Gender *
08/09/2010 📅	MALE ▾

Mother Maiden	Mother First

| Create |

6. 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.

7. 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:

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

9. 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.

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

11. Click "Update" at the top of the page to save.
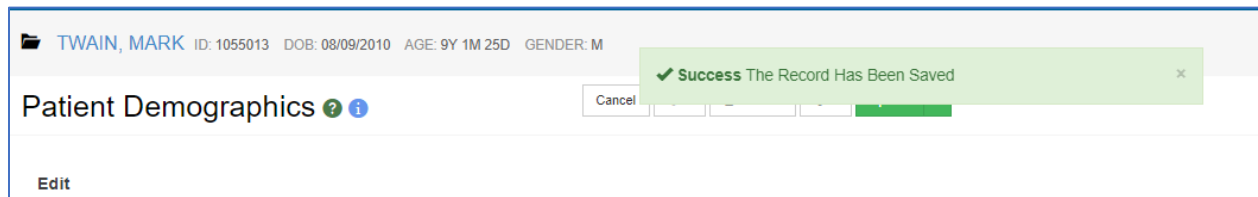
12. If you see a message stating an item is required, ensure the required fields are accurately completed until you get a "success" message.