



**To:** System Users  
**From:** WRS Development Team  
**Date:** 9/30/2022  
**Re:** New Patient Registration User Guide

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[New Patient Registration](#)  
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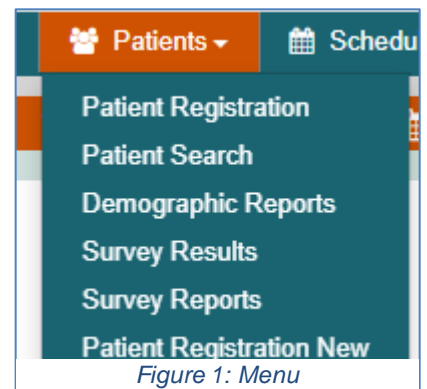
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[How It Works](#)  
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[Required Fields for Preferred Options](#)  
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## New Patient Registration

WRS has created a new, streamlined process for registering a new patient. This new registration page can be found under the “Patients” tab and by selecting “Patient Registration.”



## How It Works

When registering a new patient, your front desk staff's workflow remains the same. The required information is identified by red asterisks next to it, similar to the old registration. However, all of the "additional" and "optional" fields are listed in dropdown menus.

The screenshot shows a web form titled "Patient Registration - Step 1 of 2" with a "HELP" link in the top right. The form is organized into two columns. The left column contains fields for "First Name\*", "Middle Name", "Last Name\*", "Date of Birth\*" (with dropdowns for Month, Day, and Year), "Sex\*" (with radio buttons for Male, Female, and Unknown), and "Social Security Number\*" (with a placeholder XXX-XX-XXXX and a note "No SSN available? Enter all 9s."). The right column contains fields for "Phone\*" (with a placeholder XXX-XXX-XXXX and a "Type" dropdown set to "Cell"), "Email", "Street Address", and "Zip".

Figure 2: Patient Registration

The "additional demographics" section includes areas to:

- Upload a patient's photo.
- Scan and upload a copy of their driver's license / other ID card.
- Select marital and employment status.
- Acknowledge patient policies.

The screenshot shows the "Additional Demographics" section of the form. It is divided into several sub-sections: "Photo" with a "Choose File" button and a note "Maximum image dimensions: 400w x 400h pixels"; "Scanner Access Key" with a text input and a "Get Data from Scanner" button; "Marital Status" and "Employment Status" each with a dropdown menu; "Driver's License Front" and "Driver's License Back" each with a "Choose File" button and a note "No file chosen"; and "Patient Policies" with two sections of radio button options. The first policy section has "Signature Pending" selected, and the second has "Does Not Accept" selected.

Figure 3: Additional Demographics

The “optional demographics” section includes race & ethnicity, language preference, gender identification, and sexual orientation.

The screenshot shows a form titled "Optional Demographics" with an expandable arrow icon. It is divided into three main sections: "Race & Ethnicity", "Gender Identification", and "Sexual Orientation".

- Race & Ethnicity:** Includes a text input field labeled "Select a race" and a list of checkboxes for "American Indian/Alaska Native", "Asian", "Black/African American", "Native Hawaiian or Other Pacific Islander", "White", and "Other". Below the list is a dropdown menu and a "Decline" checkbox.
- Gender Identification:** Includes a list of checkboxes for "Male", "Female", "Transgender male/Trans man/Female-to-male", "Transgender female/Trans woman/Male-to-female", "Genderqueer, neither exclusively male nor female", "Additional gender category/(or other), please specify:", and "Decline".
- Sexual Orientation:** Includes a list of radio buttons for "Straight or heterosexual", "Lesbian, gay, or homosexual", "Bisexual", "Something else, please describe:", "Don't know", and "Decline".

Figure 4: Optional Demographics

If the personnel registering the patient does not want to enter in the additional or optional demographic information upon registration, they can leave it blank. Patients can enter this information in the patient portal, in the check in module, and on their new patient paperwork.

## Required Fields for Preferred Options

Complete Patient Registration requires that the staff collect, at a minimum, the following items:

- First name
- Last name
- Date of Birth
- Sex
- Social Security Number (can be 9's)
- Phone Number
- Street Address
- Zip Code

The screenshot shows a web form titled "Patient Registration - Step 1 of 2". It contains several input fields and dropdown menus. The fields are: First Name, Middle Name, Last Name, Date of Birth (with Month, Day, and Year dropdowns), Sex (with radio buttons for Male, Female, and Unknown), Social Security Number (with a placeholder XXX-XX-XXXX and a note "No SSN available? Enter all 9s"), Phone (with a placeholder XXX-XXX-XXXX), Type (with a dropdown menu showing "Cell"), Email, Street Address, Zip, and Practice Location (with a dropdown menu). There are two expandable sections: "Additional Demographics" and "Optional Demographics". A "Next Page" button is located at the bottom right.

Figure 5: Complete Registration

Portal-Compliant Patient Registration Requires:

- First name
- Last name
- Date of Birth
- Sex
- Social Security Number (can be 9's)
- Phone Number

This screenshot is identical to Figure 5, showing the "Patient Registration - Step 1 of 2" form. It contains the same input fields and dropdown menus: First Name, Middle Name, Last Name, Date of Birth (Month, Day, Year), Sex (Male, Female, Unknown), Social Security Number (XXX-XX-XXXX, "No SSN available? Enter all 9s"), Phone (XXX-XXX-XXXX), Type (Cell), Email, Street Address, Zip, and Practice Location (dropdown). It also features expandable sections for "Additional Demographics" and "Optional Demographics", and a "Next Page" button.

Figure 6: Portal Compliant

## Quick Patient Registration Requires:

- First name
- Last name
- Date of Birth
- Sex
- Social Security Number (can be 9's)

The screenshot shows a web form titled "Patient Registration - Step 1 of 2" with a "HELP" icon in the top right corner. The form is organized into several sections:

- First Name\***: A text input field.
- Middle Name**: A text input field.
- Last Name\***: A text input field.
- Date of Birth\***: Three dropdown menus for "Month", "Day", and "Year".
- Sex\***: Three radio buttons labeled "Male", "Female", and "Unknown".
- Social Security Number\***: A text input field with a placeholder "XXX-XX-XXXX" and a small note "No SSN available? Enter all 9s."
- Phone**: A text input field with a placeholder "XXX-XXX-XXXX" and a "Type" dropdown menu with "Cell" selected.
- Email**: A text input field.
- Street Address**: A text input field.
- Zip**: A text input field.
- Practice Location**: A dropdown menu.

At the bottom of the form, there are two expandable sections:

- ▼ **Additional Demographics**
- ▼ **Optional Demographics**

A blue "Next Page" button is located in the bottom right corner of the form area.

Figure 7: Quick Registration