

How To:

Add & Edit a Patient

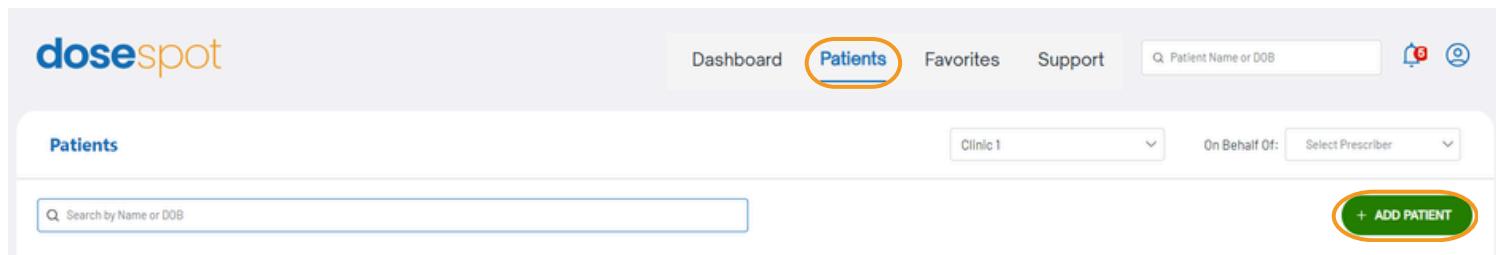
What's Inside

- Add New Patient
- Edit Patient Information
 - View/Edit Patient Information
 - View Coverage Details
 - Add/Edit Drug Allergies
 - Add/Edit Patient Diagnosis Codes
 - Use Patient Diagnosis Codes
 - Manage Patient Pharmacies

How to Add & Edit a Patient

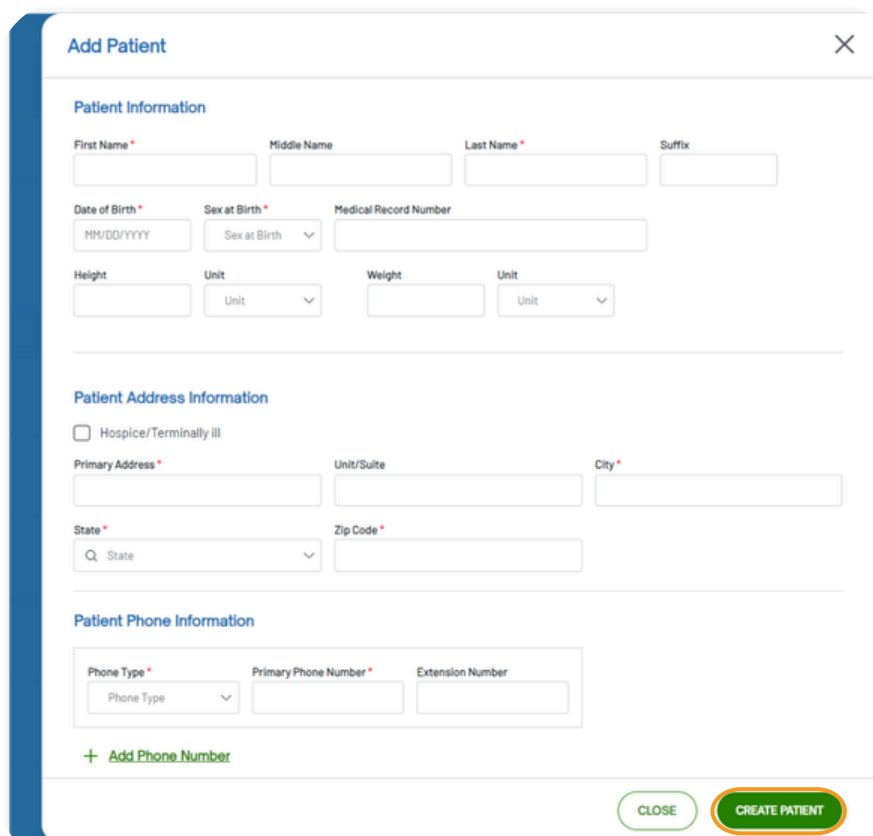
Add a New Patient

1. Select the **Patients** tab on the top of your screen.
2. You will then be brought to the patient list tab where you can search or add a patient.
3. To add a new patient, click the **+ Add Patient** button.



The screenshot shows the DoseSpot web application interface. At the top, the 'dosespot' logo is on the left, and navigation links for 'Dashboard', 'Patients' (highlighted with an orange circle), 'Favorites', and 'Support' are in the center. A search bar on the right contains the text 'Patient Name or DOB'. Below the navigation bar, the 'Patients' tab is active, showing a search bar with the placeholder 'Search by Name or DOB' and a green '+ ADD PATIENT' button on the right.

4. Fill in the new patient's personal and demographic information. Once you click the **Create Patient** button, they will be added to your patient list.



The screenshot shows the 'Add Patient' form, which is a modal window with a close button (X) in the top right corner. The form is divided into three main sections: 'Patient Information', 'Patient Address Information', and 'Patient Phone Information'.
Patient Information: Includes fields for 'First Name *', 'Middle Name', 'Last Name *', and 'Suffix'. Below these are 'Date of Birth *' (with a date picker), 'Sex at Birth *' (with a dropdown), and 'Medical Record Number'. Further down are 'Height' and 'Weight' fields, each with a 'Unit' dropdown.
Patient Address Information: Starts with a checkbox for 'Hospice/Terminally ill'. Below are 'Primary Address *', 'Unit/Suite', and 'City *' fields. At the bottom of this section are 'State *' (with a dropdown) and 'Zip Code *' fields.
Patient Phone Information: Includes 'Phone Type *' (with a dropdown), 'Primary Phone Number *', and 'Extension Number' fields. A green '+ Add Phone Number' link is located below these fields.
At the bottom right of the form are two buttons: a green 'CLOSE' button and a green 'CREATE PATIENT' button.

Edit Patient Information

After adding the patient, you will be automatically redirected to their patient landing page, where you can:

- 1 View or Edit Patient Information**
Easily view or edit patient information to ensure accurate and up-to-date records, enhancing care and communication.
- 2 View Coverage Details**
Access and review coverage details to ensure patients receive the benefits they need, helping you provide informed care.
- 3 Add or Update Drug Allergies**
Quickly add or update drug allergies to maintain accurate patient records, ensuring safety and informed treatment decisions.
- 4 Manage Preferred Pharmacies**
Manage the patient's preferred pharmacies, including the option to set a default pharmacy that seamlessly carries over into the prescribing flow, saving you time and effort with each prescription.

dosespot Dashboard **Patients** Favorites Support 28

Perseus Abingdon
DOB: 09/01/2012
Gender: Male

Patient Overview 6
Medication History
[+ ADD A PRESCRIPTION](#)

Default Pharmacy:
Gateway Pharmacy
1048 N McEwan St
Clare, MI 486171154
Manage Patient Pharmacies 4

Patient Information

Address: 98 Bayview Ave
New Rochelle, NY 10805
Phone: (347) 654-7751
Height: 58 Inch Weight: 75 lb

Insurance Plan PRO-NY-12
Retail: Covered
Mail Order: Covered
Member ID: PRO-PBM*NY*217754X

[View/Edit Patient Information](#) 1 [View Coverage Details](#) 2

Drug Allergies

- Peanut (Allergy)
- Amoxicillin (Allergy)

[Add/Edit Drug Allergies](#) 3

Tasks (6)

Perseus's Prescriptions

Prescriptions Self-Reported Medications

View Inactive Medications

Prescription	Quantities	Pharmacy	Sent By	Sent On	Status
test					
- Addyi Oral Tablet 100 MG - Adderall Oral Tablet 10 MG	Dispense: 20 Refills: 0	Gateway Pharmacy, 1048 N McEwan St Clare, MI 486171154	christian prescriber View Details	Jan 7, 2025 5:53 PM MST	Inactive Completed
Substitutions Allowed 20 day supply Sig: test directions Effective Date: 01/06/2025					
Adderall Oral Tablet 10 MG					

Edit Patient Information

Easily view or edit patient information by clicking on **View/Edit Patient Information** from the landing page to ensure accurate and up-to-date records, enhancing care and communication.

Once changes are made, press **Save** to complete the editing process.

Edit Patient Information

Patient Information

First Name *

Middle Name

Last Name *

Suffix

Winston

Barnaby

Addington

Date of Birth *

Sex at Birth *

Medical Record Number

03/14/1940

Male

123456789

Height

Unit

Weight

Unit

65

cm

162

kg

Patient Address Information

☐ Hospice/Terminally ill

Primary Address *

Unit/Suite

City *

3rd

178 Paradise Crescent

Royal Palm Beach

State *

Zip Code *

Q Florida

33411

Patient Phone Information

Phone Type *

Primary Phone Number *

Extension Number

Cell

(857) 604-4591

Phone Type *

Secondary Phone Number

Extension Number

Cell

(919) 323-6689

✕ Delete Phone

Set as Primary Phone Number

+ Add Phone Number

CLOSE

SAVE

View Coverage Details

On the patient landing page, you have the ability to **View Coverage Details** under the Patient Information section. Once you access the coverage details, you can view the various insurance plans available for the patient.

Select the appropriate plan from the drop-down menu and click **Save** to update the patient's coverage.

Coverage Details

Insurance Plan:

PROINFORMA PBM (PRO-FL_55402) ▼

PBMX (FLORIDA-WE8)

Payer ID: T00000000022652
BIN: 001248
PCN: MW-A554-02
Member ID: PRO-PBM^FL^33256

Eligibility

Retail: Covered
Mail Order: Covered
Long Term Care Pharmacy: Covered

Demographic Information

Winston Addington
03/14/1940, Male
178 Paradise Crescent
Royal Palm Beach, FL 334110124

BACK

SAVE

Add/Edit Drug Allergies

Click **Add/Edit Drug Allergies** on the landing page to maintain accurate patient records, ensuring safety and informed treatment decisions. Here, you can:

- Indicate if the patient has no known allergies.
- View and edit list of current drug allergies.
- Add a new drug allergy.

Once changes are made, press **Save Changes** to complete the editing process.

Add/Edit Drug Allergies ✕

☐ No Known Allergies

Current Drug Allergies

NOTE: Interaction checks will not include any drug allergies marked with an asterisk (*).

Penicillins ▼

+ Add Drug Allergy

Drug Allergy Details ^

Q Search drug allergies

Status * Active ▼ Onset Date * 04/22/2026

Reaction Type * Allergy ▼

Reaction Description

[Clear](#)

CANCEL **SAVE CHANGES**

Click on a current drug allergy to update it.

Identify the status, onset date, and reaction type of a new drug allergy.

Add/Edit Patient Diagnosis Codes

Click **Add/Edit Diagnosis Codes** on the landing page to save diagnosis codes to the patient for future visits and to use the saved diagnosis codes within the prescribing workflow. Here, you can:

- View and edit the list of current diagnosis codes.
- Add a new diagnosis code.

Once changes are made, select **Update Diagnosis** or **Add to Current List** to complete the editing process.

Add/Edit Diagnosis Codes

Current Diagnosis Codes

(L20.84) Intrinsic (allergic) eczema

Diagnosis Code: L20.84

Onset (Optional) Expiration (Optional)

MM/DD/YYYY MM/DD/YYYY

RESOLVE UPDATE DIAGNOSIS

Mark as Error and Remove

Add New Diagnosis Code

Diagnosis Code*

Search diagnosis codes

Onset (Optional) Expiration (Optional)

MM/DD/YYYY MM/DD/YYYY

Cancel ADD TO CURRENT LIST

CLOSE

Click on a current diagnosis code to update onset and expiration dates, resolve, or mark as error and remove.

Identify the diagnosis code, onset date, and expiration date.

Use Patient Diagnosis Codes

Patient Diagnosis Codes are also available within the prescribing workflow. Patient diagnosis codes will appear when selecting the **Current Patient Diagnosis** tab, reducing duplicate work and making it easier to include important diagnosis information for the pharmacy.

New diagnosis codes can also be added by selecting **Diagnosis Search/Add** and searching for new diagnosis codes.

Click on Current Patient Diagnosis to select a diagnosis code.

Click Diagnosis Search/Add and search for new diagnosis codes.

The screenshot shows a prescription form for Hydrocortisone Topical Cream 2.5 %. The form includes fields for Strength (2.5 %), Diagnosis Codes (Optional), Build Medication Using (SIG Builder), Dose Delivery Method, Dose Quantity, Dose Form, Route of Administration, Frequency, Day Supply, and Patient Directions (SIG). The Diagnosis Codes section has two tabs: 'Current Patient Diagnosis' and 'Diagnosis Search/Add'. The 'Current Patient Diagnosis' tab is selected, showing a search bar and a list of diagnosis codes, including '(L20.84) Intrinsic (allergic) eczema'. The 'Diagnosis Search/Add' tab is also visible, with a search bar and a list of diagnosis codes. The form is titled 'Hydrocortisone Topical Cream 2.5 %' and has a close button (X) in the top right corner. The 'Diagnosis Codes (Optional)' section has a search bar and a list of diagnosis codes. The 'Build Medication Using' section has a dropdown menu for 'SIG Builder'. The 'Dose Delivery Method' section has a search bar and a dropdown menu. The 'Dose Quantity' section has a search bar. The 'Dose Form' section has a search bar and a dropdown menu. The 'Route of Administration' section has a search bar and a dropdown menu. The 'Frequency' section has a search bar and a dropdown menu. The 'Day Supply' section has a search bar. The 'Patient Directions (SIG)' section has a search bar. The form has buttons for 'Clear', 'CANCEL', and 'CREATE MEDICATION' at the bottom.

Manage Patient Pharmacies

Manage the patient's preferred and default pharmacies by clicking on **Manage Patient Pharmacies** from the landing page. You can search by pharmacy name, address, or phone number. In the results, you can:

- **Set a default pharmacy.** This default will automatically apply to future prescriptions, but you can still choose a different pharmacy each time you send a prescription, if needed.
- **Add pharmacy as patient preferred.** This will appear in your preferred pharmacy list, making it easy to choose when you don't want to use the default option.
- **Remove pharmacy as patient preferred.** This will ensure it no longer shows up in your preferred list.

Perseus Abingdon
DOB: 09/01/2012
Gender: Male

Patient Overview **19**
Medication History

+ ADD A PRESCRIPTION

Default Pharmacy:
Shollenberger Pharmacy
2002 S. McDowell Blvd Ext
Petaluma, CA 94954
Manage Patient Pharmacies

?

Manage Patient Pharmacies

Current Default Pharmacy:
Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext, Petaluma, CA 94954

←

10805

×

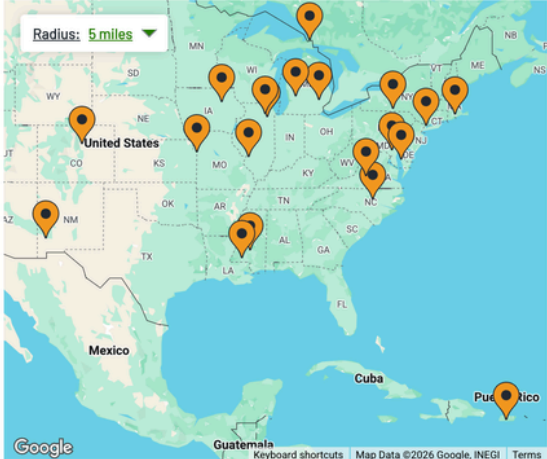
Search Results: 10805

Shollenberger Pharmacy
2002 S. McDowell Blvd Ext Petaluma, CA 94954
Phone: (707) 984-5571 Fax: (707) 988-4744
CURRENT DEFAULT PHARMACY

CVS Pharmacy # 2578
16 WEYMAN AVE. NEW ROCHELLE, NY 10805
Phone: (914) 235-7182 Fax: (914) 235-6626
Remove as Patient Preferred

WALGREENS DRUG STORE #10805
1628 SIMPSON HIGHWAY 49 MAGEE, MS 391114294
Phone: (601) 849-4959 Fax: (601) 849-6645
Add as Patient Preferred

Radius: 5 miles



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CANCEL

UPDATE DEFAULT PHARMACIES