

Check In Process for Clinical and Clerical Staff

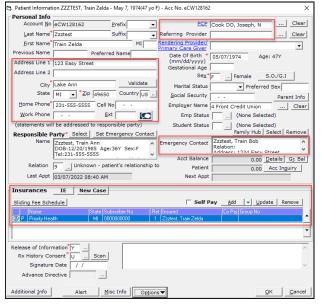
Check In Process

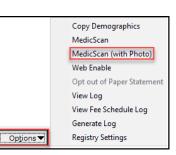
Patient presents at the window.

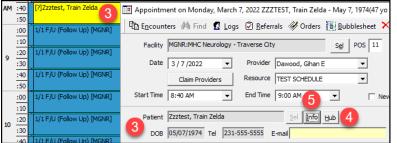
- 1. To open the Resource Schedule:
 - a. Click on the Resource Schedule under the Practice Band or
 - b. Click on the **Letter S** Quick Launch Button (Jellybean) to open the dropdown menu, and then select Resource Schedule.
- 2. Click the checkbox next to the appropriate Provider or Resource to select the schedule.
- Double click the patient's appointment. Use two patient identifiers to verify that you have the correct patient. Enter the patient's email address.
- Click the **Hub** button to determine if the patient's photo identification has been uploaded.
 - a. If the patient does not have a picture in the Hub, ask for photo identification.
- 5. Close the Hub and click the **Info** button to verify the patient's demographic information.
 - a. To scan the photo identification:
 - i. Place the identification card face down in the card scanner.
 - ii. From the Options button on the bottom of the screen, select
 MedicScan (with Photo). Answer the prompts as they appear.
 Answer Yes to override existing information, or No to skip past
 the prompt. Select Yes to update the photo.
- 6. Confirm and/or update the patient's address, phone number, PCP, Referring Provider, emergency contact, and insurance information.
 - a. To add insurance information with the insurance card:
 - i. Place the insurance card face down in the card scanner.
 - ii. In the insurances section of the Patient Info screen, click the Caret to the right of the Add button.

Self Pay	<u>A</u> dd	×	<u>U</u> pdate	Remov	
	Insurance Scan				

iii. Click Insurance Scan.











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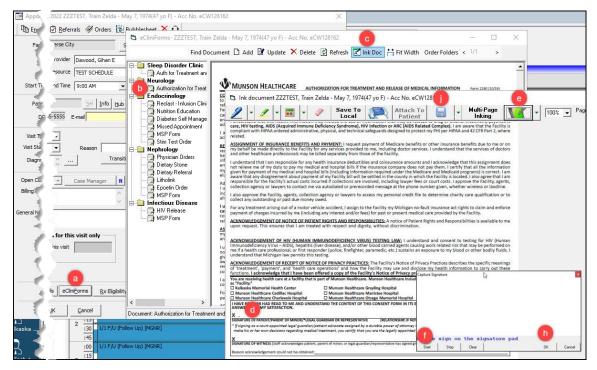
- iv. Select the appropriate insurance company from the list.
- v. Indicate if the insurance is primary, secondary, or tertiary by checking the appropriate box.
- vi. Click **OK**.
- b. To terminate existing insurance information:
 - Select the payer from the list and click Update to open the insurance detail screen.

😂 Patient - Insurance Detail ZZZTEST, Train Zelda - M	lay 7, 1974(47 yo F)	- Acc No. eCW128162
Insurance Address		Source of Payment
Change Insurance [[Insurance Billing Info.]] Priority Health PO BOX 232 GRAND RAPIDS, MI-495010232 Tel: 800-942-4765 Payor Id: 38217 Medigap Id:	 ✓ Primary ☐ Secondary ☐ Tertiary 	CI ANSI-Commercial Insurance Co. Insurance class for reports 2336 Priority Health
	Terminated	Coverage Dates (mm/dd/yyyy) / / to / /

- ii. Check the box to the left of **Terminated** and choose appropriate coverage dates. (A red X will appear to the left of that insurance on the patient info page.)
- iii. Click **OK** until you return to the patient appointment window.

Note: Do not use the remove button in the insurances field unless the insurance was added in error. Inactive insurances need to be left on the list for billing purposes.

- 7. Have the patient review the Authorization for Treatment and Release of Medical Information form. To capture the patient's electronic signature:
 - a. From the bottom of the appointment window, click the **eCliniforms** button.
 - b. Click once on the correct form in the list.
 - c. Click Ink Doc at the top of the screen.
 - d. Scroll to the patient signature line and click the cursor to indicate where the signature will be placed.
 - e. Click on the Green Signature Pad at the top of the screen.
 - f. Click the **Start** button.
 - g. Ask the patient to sign.
 - h. Click the **Ok** button.





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- i. Staff member will sign as witness using mouse.
- j. Click Save.
- 8. Change the visit status to ARR (Check In).

Visit Type	F/U (Follow Up)	•
Visit Status	PEN (Pending)	-
Diagnosis	ANSPH (Voice)	^
Diagnobib	ARR (Check-In)	
	CHK (Check Out)	