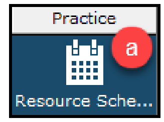
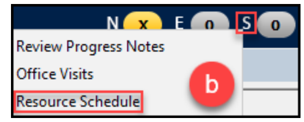
Check In Process

Patient presents at the window.

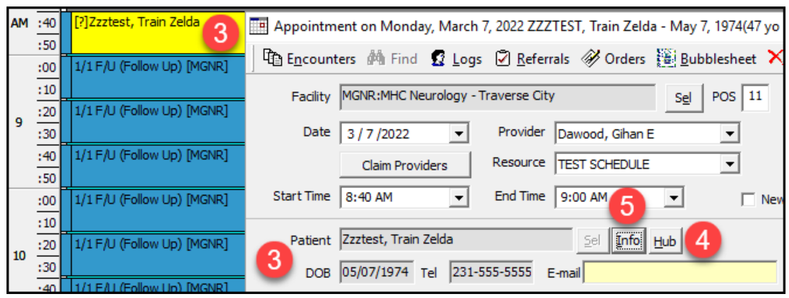
1. To open the **Resource Schedule**:
    a. Click on the Resource Schedule under the **Practice Band** or
    b. Click on the **Letter S** Quick Launch Button (Jellybean) to open the dropdown menu, and then select Resource Schedule.





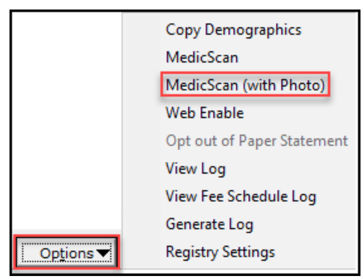
2. Click the checkbox next to the appropriate Provider or Resource to select the schedule.

3. Double click the patient's appointment. Use two patient identifiers to verify that you have the correct patient. Enter the patient's email address.

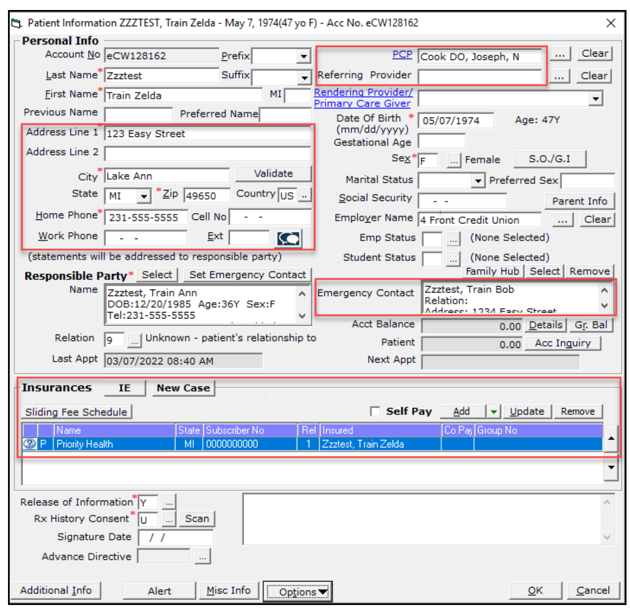


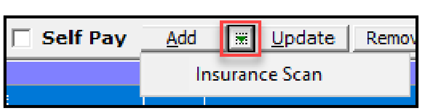
4. Click the **Hub** button to determine if the patient's photo identification has been uploaded.
    a. If the patient does not have a picture in the Hub, ask for photo identification.

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.

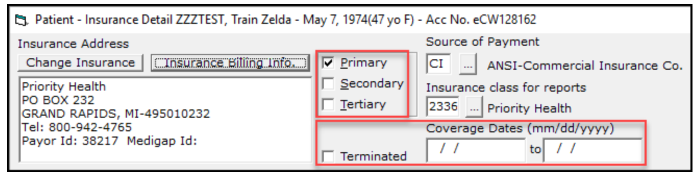




        iii. Click Insurance Scan.

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**.

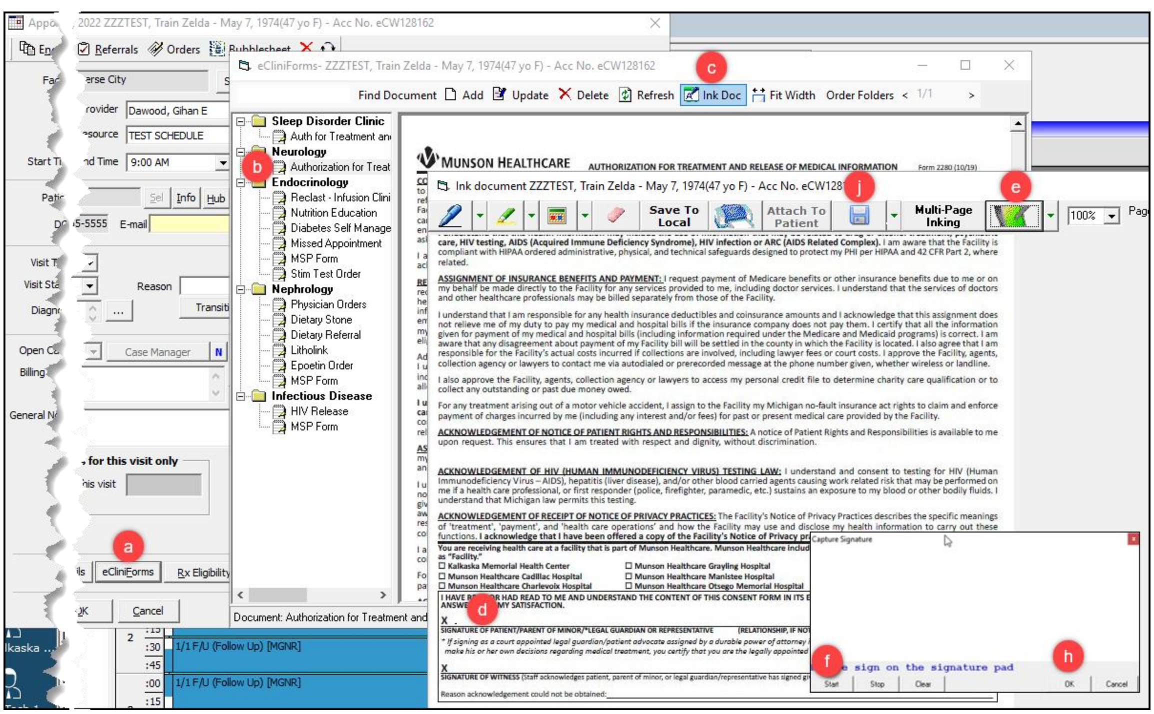
b. To terminate existing insurance information:
   i. Select the payer from the list and click **Update** to open the insurance detail screen.



   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.



   i. Staff member will sign as witness using mouse.
   j. Click **Save**.

8. Change the visit status to **ARR (Check In)**.