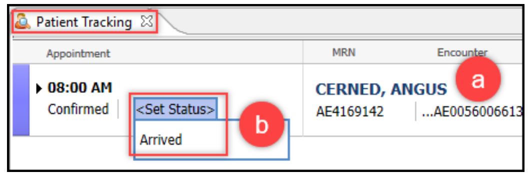
Patient Check In for Clinical and Clerical Staff

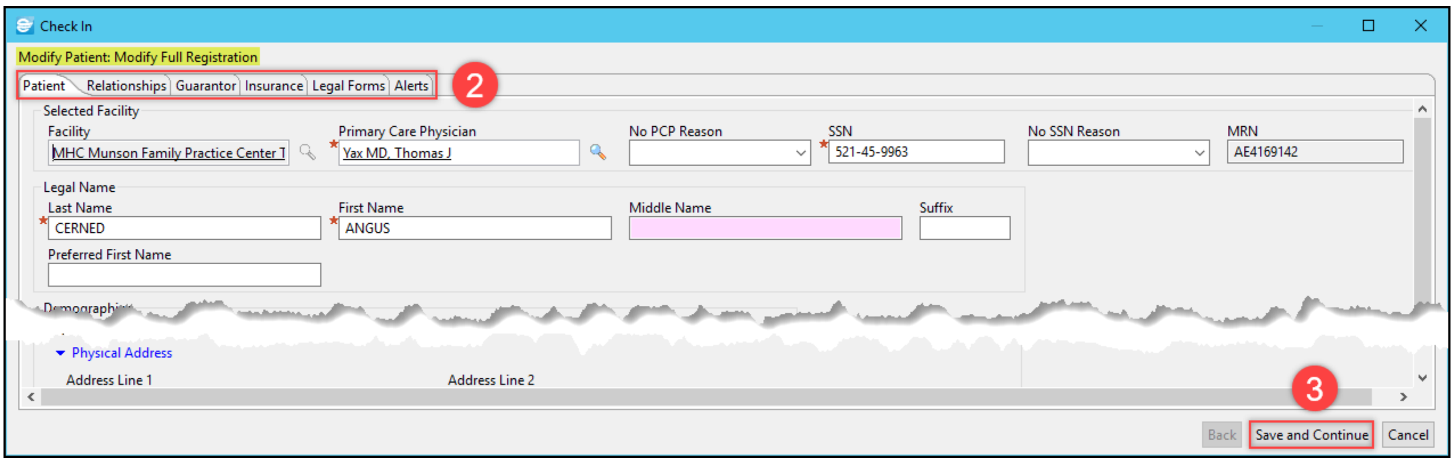
Manual Patient Check In

1. From the Patient Tracking screen:
   a. Locate patient.
   b. Set status to **Arrived** to launch the check-in conversation.

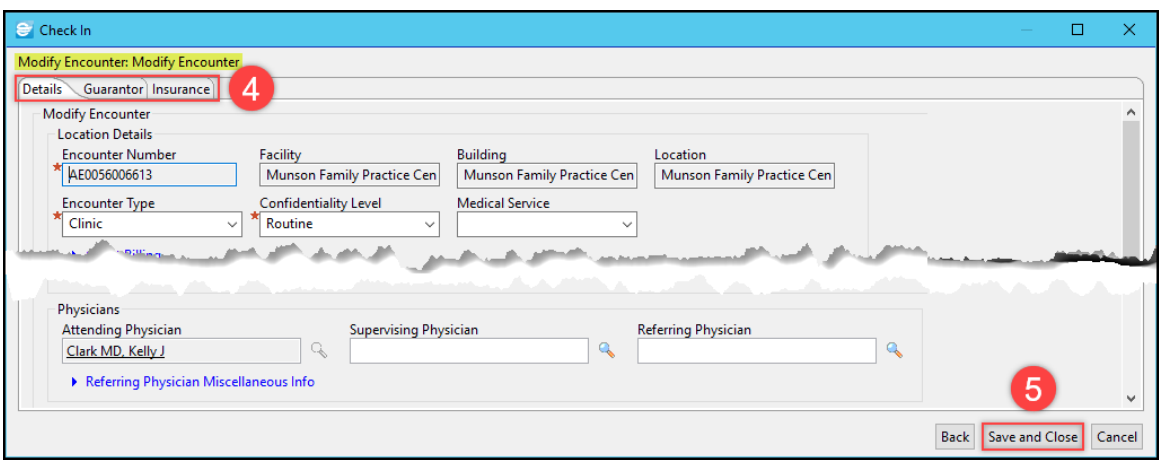


2. Move left to right through the tabs to verify or update patient demographic information within Modify Patient: Modify Full Registration conversation.
3. Click **Save and Continue**.

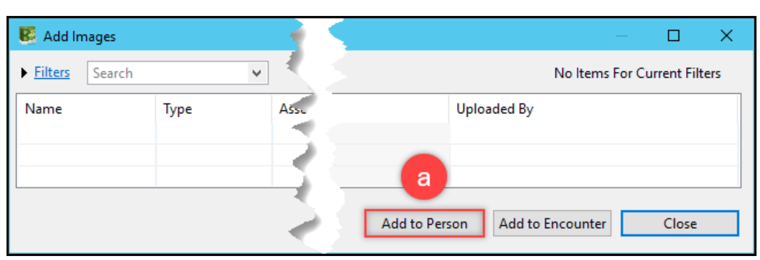
Note: For additional details on the registration process and individual screens, please see the Clinical EHR Education website.



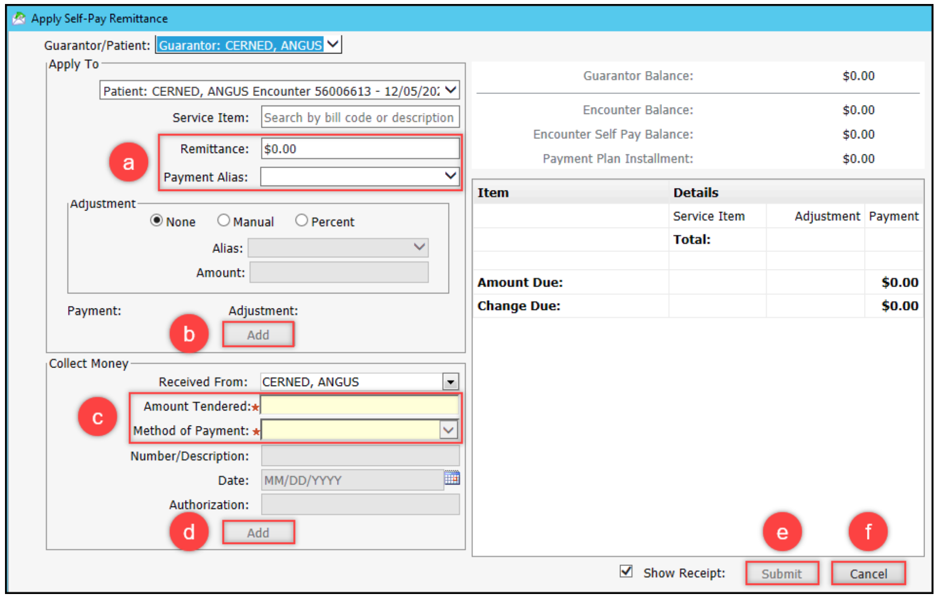
4. Move left to right through the tabs and verify or update encounter specific information within the Modify Encounter conversation.
5. Click **Save and Close**.



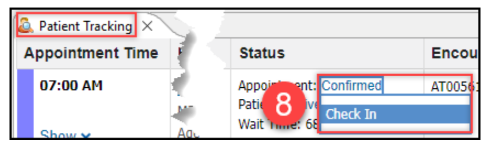
6. Within the Add Images screen:
   a. Click **Add to Person**, then follow the scanning process to scan driver's license and insurance card(s) as needed.



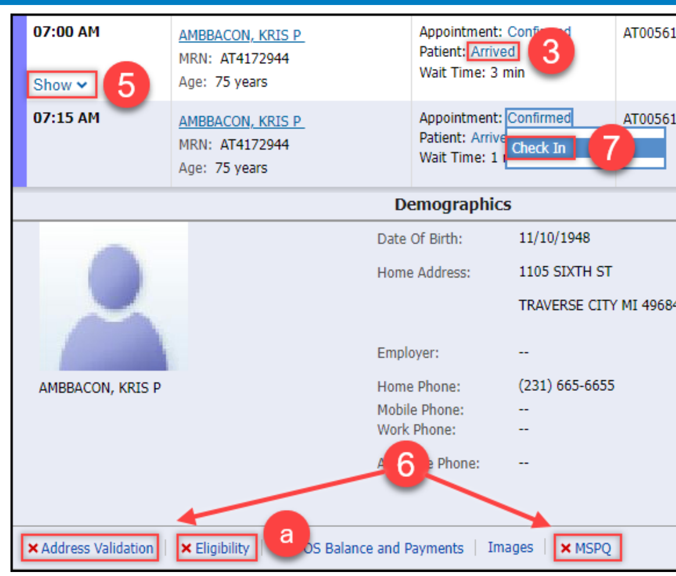
7. Within the Apply Self-Pay Remittance screen (for cash or check payments only):
    a. Complete Remittance and Payment Alias fields.
    b. Click the **Add** button within the Apply To box.
    c. Complete Amount Tendered and Method of Payment fields.
    d. Click the **Add** button within the Collect Money box.
    e. Click **Submit** when complete.
    f. If no copay, not collecting, or if the patient is paying with credit card, click **Cancel**.



8. From the Patient Tracking screen, set the status to **Check In**. This will update the Arrived status to Ready in both Revenue Cycle and PowerChart.



Tonic e-Registration Patient Check In



1. The patient will check in at the clinic using either the QR code or the iPad.
2. Once e-Registration is complete, the patient will return the iPad to the front desk.
3. Staff will see the patient's status has automatically updated to **Arrived** in Revenue Cycle.
4. Follow the Patient Answer Verification process to update insurance information if needed (see Tonic Manual for more details).
5. Open the patient's appointment details on the Patient Tracking screen by clicking in the space next to the time or by clicking Show.
6. Click on items with a red x to review and update.
    a. Click Eligibility to open the encounter. Submit insurance eligibility if needed, then click Save. **This must be completed for the encounter to have a confidentiality level assigned.**
7. From the Patient Tracking screen, set the status to **Check In**. This will update the Arrived status to Ready in both Revenue Cycle and PowerChart.

NOTE: If the patient enters new insurance information into Tonic, click on the patient's name on the Patient Tracking screen to open the chart and enter the new information under the insurance tab. Insurance must be linked at both the person and encounter levels.