Tonic Frequently Asked Questions for Clinical and Clerical Staff

Revenue Cycle and PowerChart FAQs

Does Revenue Cycle automatically update the patient's status?

As soon as the patient scans the QR code or uses the iPad to begin the check in process for their appointment, Revenue Cycle automatically changes their status to Arrived. Once the patient has completed e-Registration, they will hand the iPad back in to the front desk. The completion status is also viewable on the Tonic dashboard. Staff will then manually update the patient's status to Check In.

How do I manually check a patient in on Revenue Cycle if they do not want to use the QR code or iPad?

Locate the patient on the Patient Tracking screen. Change status to **Arrived** to launch the check-in conversation. Once all fields are updated as needed, change the patient's Confirmed status to Check In. This will automatically update the Arrived status to Ready in both Revenue Cycle and PowerChart.

Where do I find the updated information collected by Tonic?

Completed forms are found in PowerChart under Documents or Clinical Notes. Photo identification and insurance cards are located Revenue Cycle under Images.

The patient was unable to answer the MSPQ questions during the check in process. Is there a report that I can run to make sure these are captured?

Yes! From the reporting portal, run **MSPQ Ambulatory Registration Report** with appropriate filters. Make sure to set the end date to one day past the date you are trying to capture on the report.

- If the report shows NOT ANSWERED/Not Answered: The patient was not prompted to complete the questionnaire, as it is only required every 90 days.

- If the report shows Answered/NO: The patient was not able to complete the questionnaire at the time of the appointment. Staff should contact the patient to capture these questions for that date of service.

DATE_OF_SERVICE	FIN	PATIENT	DOB	PT_FAMILY_FRIEND_AVAILABLE	ANSWER_GIVEN	APPT_STATUS
1 10/04/2022	AM0056084521	ZZZZTONICTEST, TODD	01/14/1989	NOT ANSWERED	Not Answered	Checked Out
2 10/13/2022	AM0056084848	ZZZZTONICTEST, ICEMAN	04/29/1985	ANSWERED	No	Checked Out
3 10/14/2022	AM0056084856	ZZZZTONICTEST, ACE	04/29/1985	NOT ANSWERED	Not Answered	Checked Out

Reporting Portal | MSPQ Ambulatory Registration Report ✕

Tonic Survey, e-Form, and Artera Reminder FAQs

How often do patients have to fill out e-Registration forms?

Tonic has logic built in that will only send out forms when they are due. Staff can manually send a form if the patient wants to update information outside of those timeframes.

Driver's License	Annually
Consent Form	Annually per clinic (as defined in Tonic)
Limited PHI Form	Annually across all clinics
Insurance Cards	Once initially, then only when changes are made

Can Tonic send an e-Registration link to patients if they are not signed up for Artera appointment reminders?

> Tonic e-Registration links will only be sent through the 7-day and 1-day Artera appointment reminders if SMS Text is selected in the Appointment Reminder field when scheduling an appointment. If SMS Text is not selected, the patient will not receive a link to complete e-Registration.
>
> Best practice is to use SMS Text for the patient reminder.

How does the patient access the link to their e-Registration on the iPad if they weren't completed prior to the appointment?

> The Tonic app on the iPad will ask the patient to verify their identity and will then show the patient the correct forms for their visit.

If a patient completes e-Registration with the 7-day link, but then reschedules or cancels their appointment, do they have to complete e-Registration again?

> The patient will need to verify demographic information for each subsequent appointment, but if the form requirements have been met, they will not have to fill them out until they are due.

Are new patients able to complete e-Registration though Tonic?

> Yes, all patients and all visits will be able to complete the online forms as long as SMS Text has been selected as the Appointment Reminder type.

What happens if a patient arrives late?

> If a patient tries to check in late (approximately 5 min after appointment time), they will get a message to see the front desk. This does not mean that patient cannot be seen, they just cannot use e-Registration.

Are we trying to get away from staff checking in patients?

> Yes, the goal is to alleviate pressure from the front office staff by leveraging technology. Staff are still able to manually check patients in if needed.

If a patient has difficulty reading, cannot read, is not English speaking, or has trouble with technology, does the process allow for the patient to be checked in manually?

> Yes, manual check in is still an option for any patient that has difficulty with technology or a language barrier. Russian and Spanish are available options for translation in the app.

What do I do if I am locked out of my account?

> Call the IT helpdesk or enter a helpdesk ticket. Please specify if the lockout is on the iPad Tonic app or on the Tonic website dashboard.
>
> Reminder:
> 1. **Tonic app** login on the iPad is a **general clinic login**.
> 2. **Tonic website dashboard** requires the Munson Single Sign-On credentials **per user**.

iPad and Mobile Phone FAQs

How do I combine multiple clinics on the iPad in Schedule Mode?

> 1. On the Clinic List screen, select **Tap to Select Multiple Items at The Same Time**.
> 2. Above the list of clinics, tap **Schedule**.
> 3. Select the desired clinics and tap **Confirm**.

How do I combine multiple clinics on the iPad in Self Check-In Mode?
1. On the Clinic List screen, select **Tap to Select Multiple Items at The Same Time**.
2. Above the list of clinics, tap **Self Check-In**.
3. Select the desired clinics and tap **Confirm**.

How do I switch from Schedule to Self Check-In Mode on the iPad?
Staff can switch between check-in modes by tapping the Menu button in the top right corner of the Tonic app on the iPad.

How do I switch to Schedule and retain Schedule mode?
To switch to schedule permanently, the front desk staff should follow these steps:
1. Go to **Menu** and select **Switch Clinic** from the drop-down menu.
2. Select the same clinic(s) from the list and the Schedule will now be the default view.

How do I temporarily switch from Self Check-in to Schedule on the iPad?
If a patient using Self Check-In mode needs assistance from the front desk staff:
1. Staff can tap the **Menu** button, enter their password in the pop-up window, and press **Continue**.
2. Select **Access Schedule** from the drop-down menu, manually select surveys to be administered.
3. The patient completes the selected surveys.
4. The iPad will automatically revert to the Self Check-In mode for the next patient.

How do I go back to the list of all clinics/locations from the Schedule screen on the iPad?
This option is available only if you have access to several locations. To view data for other clinics, click the **Menu** button in the upper right corner of the screen and select **Switch Clinic** from the drop-down list, a page with the list of all clinics will be presented.

How do I search for specific appointments on the iPad?
From the Schedule screen (all appointments available in your clinic(s)/location(s) for today), search for the specific patient using the **Search** field at the top of the screen. Search filters include a patient's first or last name, date of birth, or medical record number.

How do I filter scheduled appointments by provider?
To see appointments for specific providers only, click the **Filter** button, select the provider from the list of **All providers,** and click the **OK** button to confirm your selection.

How do I change the sorting of the scheduled appointments?
By default, all appointments on the Schedule screen are sorted by time of appointment. To change the default setting, click the **Sorting** button.

What should I do if the wrong patient was selected from the Schedule screen?
If no forms were opened yet: To return to the list of all appointments, click the **Back** button in the upper left corner of the screen.
If any form was already launched: Click the **Menu** button in the upper right corner of the screen and select **Exit survey without submitting data** from the drop-down list.

How do I switch user accounts on an iPad?

In Schedule mode: Click on the **Menu** button in the upper right corner of the screen and select **Log Out** from the drop-down list. The login page will display.

In Self Check-In Mode: Click on the **Menu** button and the **Heads Up** pop-up that warns about an attempt to access administrative functions. Tap **Change User**, enter your credentials (general clinic email and password) in the corresponding fields, and then tap **Log In** to proceed.

The patient received a pop-up message "You have already checked in to an appointment" on their phone (QR Check-In) or the iPad (Self Check-In Mode). What does this mean?

This alert means the patient has already registered for their appointment. Patients can check in to their appointment only one time.

Patient Answer Verification FAQs

Can I review patient answer verification information prior to the patient's appointment?

Yes, staff should be checking their reports or dashboard several times each day.

The patient answered their surveys in another language. How do I retrieve their survey in English?

In the screen that shows current and new answers within Patient Answer Verification, toggle the **Display as in report/export** to ON to view patient answers in English.