

**Summary:** Tonic is a cloud-based software application that collects demographic updates, photo IDs, insurance cards, and consent forms for patients. Much of this data is then integrated directly back into Cerner. Tonic will present the right patient, with the right form(s), at the right time.

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## Glossary

### User Definitions

Survey = Online eForm

PAV = Patient Answer Verification

## Site Access

Site: <https://munson-ss0.tonicforhealth.com/builder/>

Login credentials are passed using Single Sign On (SSO) technology.

## Available Surveys

- ❖ Consent for Treatment
- ❖ Demographic Survey
- ❖ Insurance Information
- ❖ Patient Authorization to Release Protected Health Information (PHI)
- ❖ Photo ID

## Additional Forms

- ❖ Notice of Surprise Billing
- ❖ Attendance/No Show Policy

## Pre-Check In (At Home)

1. Once a patient appointment has been created **with SMS Text selected in the Appointment Reminder field**, an Artera patient reminder notification is scheduled. This notification includes a link for the patient to complete their intake forms.
  - a. Notifications are sent 7 days and 1-day before the visit.
  - b. If a patient completes forms from the 7-day notification, they will still receive a link on the 1-day notification. Clicking that link will display that no further action is needed from the patient.



After clicking the link, the patient will be prompted to answer verification questions (patient's last name and date of birth). These answers need to match the data indicated in the patient's profile in Revenue Cycle. The patient will tap the **Submit** button to complete.

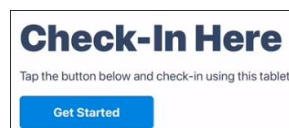
**Note:** The patient must pass verification to review their data and provide input.

2. Once the account has been verified, the patient can review their data, update it, answer questions, and sign any needed consent forms.
3. After answering all questions, the patient will tap the **Done** button to submit the survey. If forms are completed before the visit, the patient does not have to answer the questions again at the time of their visit.

## Patient Self Check In (At Clinic) – RECOMMENDED Workflow



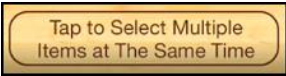
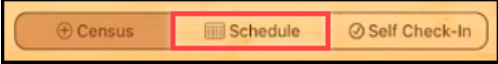
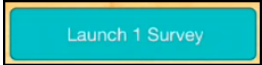
1. There are two options for Patient Self Check In:
  - a. **QR Check In:** Instruct the patient to follow the steps described on the **Check-In Here** poster at the clinic.
  - b. **iPad Check In:**
    - i. Log into the Tonic app using the general clinic login.
    - ii. Select the clinic by tapping on the clinic name (See Staff Assisted Check-In for how to select multiple clinics).
    - iii. Click **Menu** in the upper right-hand corner of the iPad screen and select **Switch to Self Check-In Mode**.
    - iv. The Check-In Here screen is the default screen on the iPad. The patient should tap the **Get Started** button.



2. The patient will be prompted to answer verification questions (patient’s last name and date of birth) to check in for their appointment. These answers need to match the data indicated in the patient’s profile in Revenue Cycle. The patient will tap the **Submit** button to complete.
3. Details of the appointment will appear on the screen.
  - a. If correct, the patient will click the **Tap Here to Continue** button to proceed.
  - b. If incorrect, the patient will be directed to return to the reception desk.
4. The patient will review their demographic information, provide answers to the questions presented, and sign any needed consent forms.
  - a. Demographic information can be updated by clicking the **Edit** button.
5. Once the patient taps the **Done** button and completes the process, they will see the Thank You screen that states their data was successfully submitted.
6. Wipe down the iPad after each patient use and verify that the iPad is back to the Check-In Here screen.



### Check In (Staff Assisted at Clinic Reception Desk)

1. Log into the Tonic app on the iPad using the general clinic login.
  - a. Select the clinic by tapping on the clinic name.
    - i. To select multiple clinics, touch the **Tap to Select Multiple Items at The Same Time** button at the bottom of the screen.
 
    - ii. Tap the **Schedule** tab on the top of the screen.
 
    - iii. Tap the radio button(s) to select the desired clinic(s) or tap **Select All** at the bottom of the screen for all clinics.
    - iv. Tap **Confirm**.
  - b. Find the patient’s appointment on the Schedule List.
  - c. Open details of the appointment by tapping on it.
2. Verify the patient’s identity and click the **Next** button to open the list of auto-assigned surveys.
  - a. From the **All Surveys** tab, additional surveys can be selected, and pre-selected surveys can be unselected before launching. (I.e., Adding Authorization for Release of Health Information)
3. Tap on the **Launch # Survey** button to launch the pre-selected survey(s) on the **Assigned** tab.
 
4. Hand the iPad to the patient to complete the forms.
5. After all forms have been completed and consents have been signed, the patient will tap **Done** to submit the information and will return the iPad to clinic staff.
6. To prepare for the next patient registration, wipe down the iPad and re-enter the password to open the Schedule list.

## Minor Patients (aged 17 and under)

Patients aged 17 and under:

1. Best practice is to encourage selecting SMS Text during appointment creation so an Artera appointment reminder and the Tonic e-Registration link will be sent to parents so consent forms can be signed.
2. The parent/guardian will sign the Consent to Treat and Patient Authorization to Release Limited PHI forms through the Tonic app.

Patients aged 13-17 seeking care privately:

1. Make sure the patient understands where the Artera appointment reminder will be sent.
2. The patient will sign the paper Consent to Treat and Patient Authorization to Release Limited PHI forms during the check in process at the clinic.

During check in, Tonic will verify who is completing the form.

1. If the patient is a minor and selects the Patient button, Tonic will launch the Thank You screen. The patient will then sign the forms at the front desk.
2. If the parent/guardian is completing the forms, they will select Patient's Legal Representative. This will prompt the Tonic app to ask for the representative's relationship to the patient.



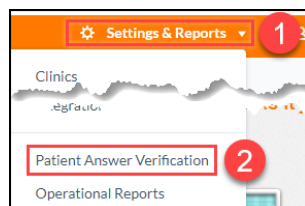
## Patient Answer Verification (PAV) and Reconciliation

Once the patient completes the surveys, the insurance information responses will be available in the Patient Answer Verification (PAV) report or on the appointments dashboard for staff to review and accept. Insurance information must be reviewed for it to populate into Revenue Cycle.

Login to <https://munson-sso.tonicforhealth.com/builder/> using your Single Sign On (SSO) credentials.

### From Settings & Reports (Recommended):

1. Go to **Settings & Reports**.
2. Click on **Patient Answer Verification**.



**NOTE:** If a patient completes their forms through the Artera link before their appointment and PAV is **NOT** completed by staff before check in with the QR code or iPad, the patient will be prompted to redo their forms.

A mobile phone number listed in the PAV appointment dashboard should not be considered confirmation that a text message was sent or that the Tonic surveys were completed by the patient.

PAV must be completed so all forms and demographic information is transmitted to Cerner.

3. On the Review & Approve Patient Answers page:
  - a. Set up your filters (Surveys, Clinics, Attending provider, etc.).
  - b. Click **Run Report**.

**NOTE:** To include non-provider resources in the report (i.e., nurse visits), set the Attending provider(s) selection to Any providers.

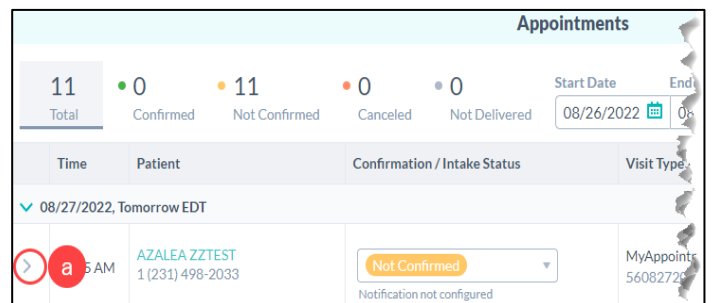


4. A page with all completed surveys that need verification will display.
  - a. Find the correct patient and click **Review Now**.

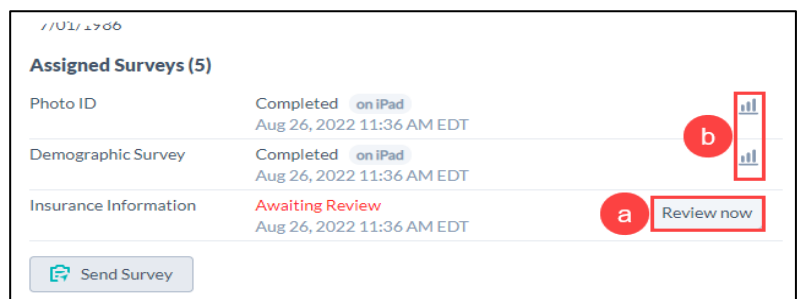
Survey	Patient	Review Status
Insurance Information Completion Date: 08/26/2022, 11:40 AM Administrated by: Jordan Roy jordanmunsonstage@tonicforhealth.com	Last name: [redacted] First name: [redacted] MRN: [redacted]	Reviewed <span>Show report</span> By: Jordan Roy jordanmunsonstage@tonicforhealth.com On: Aug 25, 2022 12:43 PM
Insurance Information Completion Date: 08/26/2022, 11:36 AM	Last name: [redacted] First name: [redacted] MRN: [redacted]	Not Reviewed <span>Review Now</span>

**From the Appointments dashboard:**

1. Find the patient's appointment on the **Appointments** dashboard by scrolling or by using the Search field.
  - a. Expand the patient view by clicking the arrow next to the patient's name.

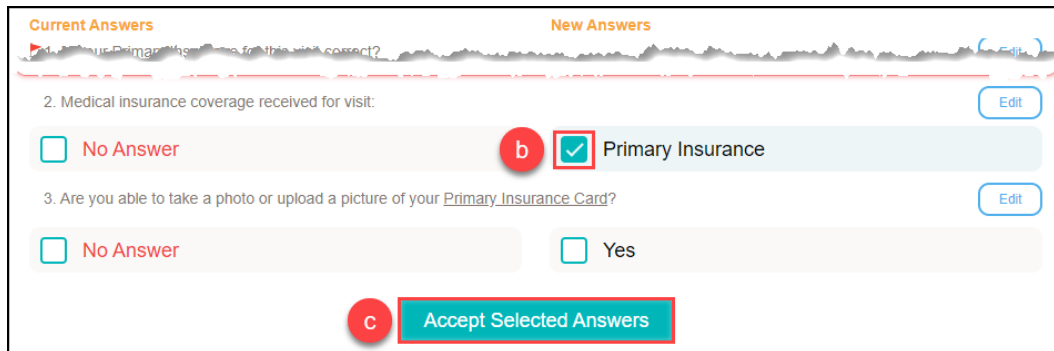
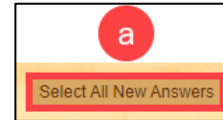


2. Under the **Assigned Surveys:**
  - a. Click on the **Review now** button next to any survey marked as Awaiting Review or Not Reviewed.
  - b. Results from completed surveys can be viewed by clicking on the browse results icon.

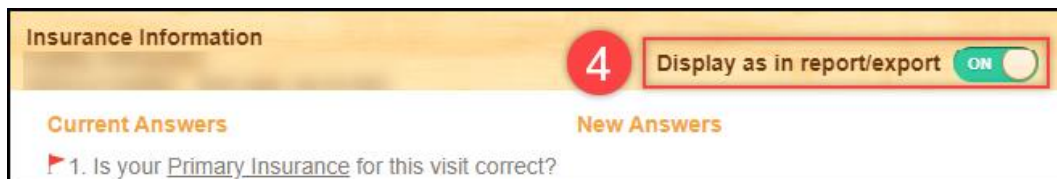


3. Staff will be redirected to a new screen showing current and new answers. Once reviewed:

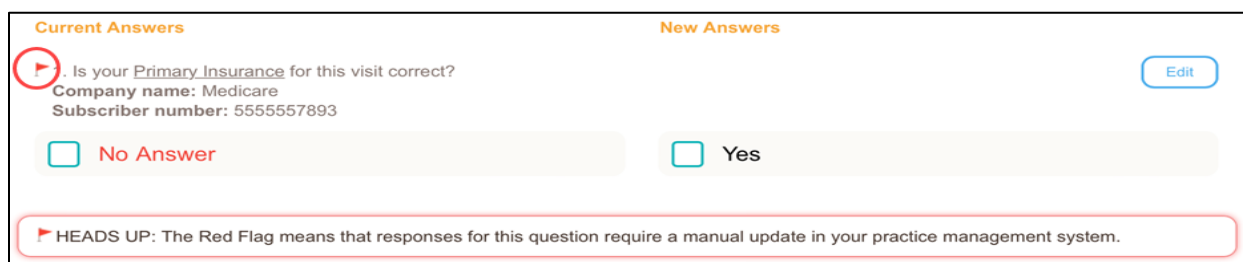
- Click **Select All New Answers** to check all selected answer boxes.
- Or click the **Check Box** next to each answer for individual selections.
- Click **Accept Selected Answers**.
- The results and PDFs will be sent to PowerChart and Revenue Cycle.



4. If the patient has answered their survey questions in another language, toggle the **Display as in report/export** to ON to view patient answers in English. This toggle is located at the top of the screen in the current and new answers section of Patient Answer Verification.



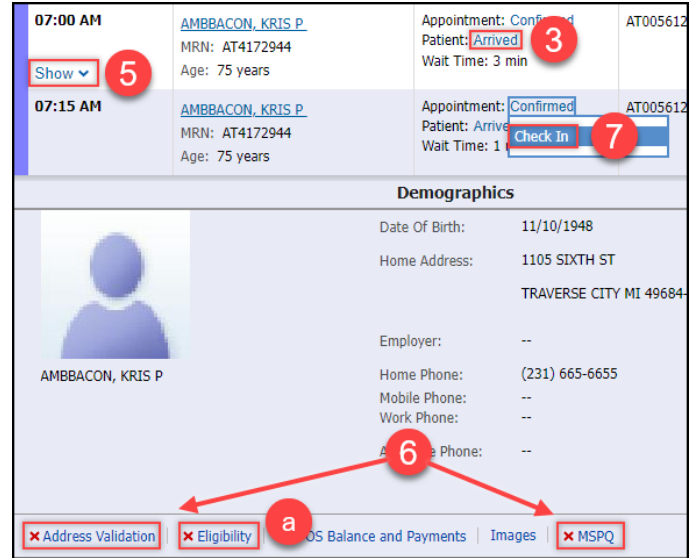
**NOTE:** If a response has a **RED** flag next to it, data must be **manually** entered into the electronic health record.



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

### Revenue Cycle Status Changes – Tonic Check In Workflow

1. The patient will check in at the clinic using either the QR code or the iPad as noted above.
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. The Tonic appointment dashboard will also show the patient’s completion status.
4. Follow the Patient Answer Verification process above to complete insurance update information if needed.
5. In Revenue Cycle, open the patient’s appointment on the patient tracking board by clicking in the space next to the time or by clicking Show.
6. Click on the items with a red x to review and update.
  - a. Click Eligibility to open the encounter. Submit insurance eligibility if needed, then click Save.



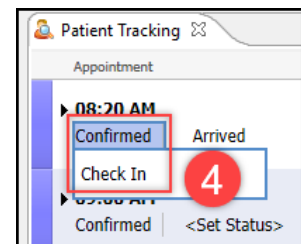
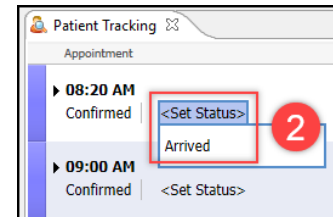
**This must be completed for the encounter to have a confidentiality level assigned.**

7. Manually change the patient’s 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. This will add the new insurance at the patient level. Then open the encounter to link the new insurance to the current encounter.

### Revenue Cycle Status Changes – Manual Check In Workflow

1. Locate the patient on the Patient Tracking screen.
2. Change status to **Arrived** to launch the check-in conversation.
3. Complete all required fields and update patient information as needed.
4. Manually change the patient’s status to **Check In**. This will update the Arrived status to Ready in both Revenue Cycle and PowerChart.



### Additional Resources

[Tonic e-Registration Demo](#)

[Tonic Train the Trainer - Youtube](#)

[Tonic Video Demo – Brief Overview of the Check In Process – Youtube](#)