**Process Description:**

* Process for rooming a patient to prepare and set expectations for the visit with the provider

**Who Must Use this Process?**

* MA

**Process Notes:**

* This standard work applies to all visit types. Additional documentation is needed for procedures.

**Process Steps**

1. Check EPIC to see if patient has arrived
2. Greet patient/Escort to room
3. Gel/wash hands
4. Vitals (H, W – 1x/year, tobacco, social history), mark as reviewed
5. Document chief complaint (unless not different from reason for visit)
6. Set visit expectations (“what is the mean reason for your visit”)
7. Reconcile medications
8. Allergies
9. ConfirmHealth Maintenance (for new, wellness, physicals *only*)
10. Complete POC Orders
11. Offer MyHealth, and activate account
12. Get patient physically ready for exam (if needing to disrobe, provide gown “opening in back”)
13. Edit Time Ready