**Process Description:**

* How to check in an new patient using EPIC

**Who Must Use this Process?**

* PSRs

**Process Requirements:**

* Practice C-I-CARE
* Knowledge of steps to complete check in for the patient in EPIC

**Process Steps**

1. Greet patient using C-I-CARE
2. Find Patient on DAR & check columns
3. **(NEW ONLY)** Inquire if patient completed and brought New Patient forms with them. If not, have them complete the new patient packet.
4. Confirm Demographics/Guarantor information
5. Verify PCP and referring physician
6. Check ID and take patient photo, if needed
7. Verify Pharmacy and Lab
8. Verify contact #
9. Collect Co-pay (if applicable)
10. Offer MyHealth brochure (if not signed up)
11. Care Everywhere (if applicable)
12. Inform patient of any Delays
13. Inform patient he/she is checked in and C-I-CARE Exit
14. Use white dot in EPIC to signal “ready for MA”

**Process Details**

| **Step** | **Why Important?** | **Scripting Examples** |
| --- | --- | --- |
| 1.Greet patient using CICARE | Service is essential, we are not greeting patients appropriately | *“Good morning/good afternoon.”*  *“Hello Mr./Ms. (if recognize).”* OR “*Can I have your name please?”*  *“My name is .* *I will check you in for your appointment today with Dr. .”* |
| 2.Find Patient on DAR & check columns. Read IVS note in DAR. |  |  |
| **3. (NEW PATIENTS ONLY)** Inquire if patient completed and brought New Patient forms with them. If not, have them complete the new patient packet |  | *“I see you are here for your Preventative exam, can you give me the forms we sent you?”*  *“Oh you didn’t bring it, that is ok you can do it now. Please have a seat and complete this.”* |
| 4. Confirm demographics/ guarantor information | Need current insurance information |  |
| 5. Verify PCP and referring physician | For correspondence back/patient care, for tracking/ business reasons |  |
| 6. Verify patient’s ID – check ID/EPIC photo or ask to take patient photo. | Taking a patients photo will eliminate the need check patient’s ID at each visit |  |
| 7. Verify pharmacy and lab |  |  |
| 8. Verify patient’s contact # | Ensure we have the correct contact information |  |
| 9. Collect co-pay (if applicable) | If not, patients get a bill, may go to COLLECTIONS | *“I see you have a $10 co-pay. How would you like to pay?”* |
| 10. Offer MyHealth brochure | Use of MyHealth will improve patient communication and cut down on incoming patient calls. | *“Do you know about MyHealth? It’s a great tool that lets you communicate with your physician, get lab results and in the future schedule appointment. Here’s a brochure. The MA can sign you up in the room, or you can sign up online”* |
| 1. Care Everywhere (Batch Process) | Transitions of care (lots of our patients are seen at PAMF, we need their results easily) |  |
| 1. Inform patient of any delays | Set expectations with patient and avoid patient confusion |  |
| 1. Inform patient he/she is checked in and C-I-CARE Exit | Avoid patient confusion about whether or not they are checked in. | *Ok, Mr./Ms., you are now checked in”*  *“I will notify \_\_\_\_\_\_\_\_, Dr.\_\_\_\_\_\_ medical assistant that you are ready (if not said above)”*  *“Is there anything else I can do for you?”* |
| 1. Use white dot in EPIC to signal “ready for MA” |  |  |