

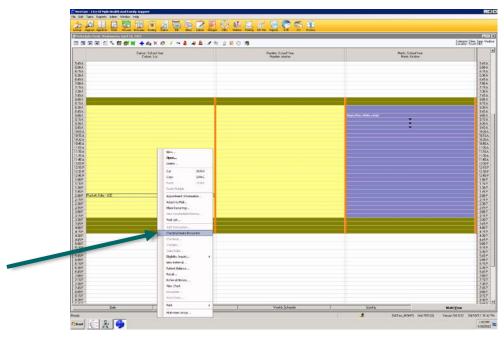


This guide will help you check-in a patient appointment.

I. Check-in an Appointment

A. Create the Encounter

- 1. Select the appointment in the Appointment Book by left-clicking on it.
- 2. Now right-click on the appointment and select *Checkin/Create Encounter*.

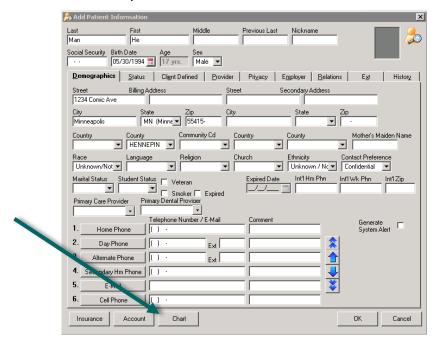


3. New Patient

The following two screens will appear only if you are checking in a new patient.

a. Patient Information

Review the information for accuracy and then click Chart.

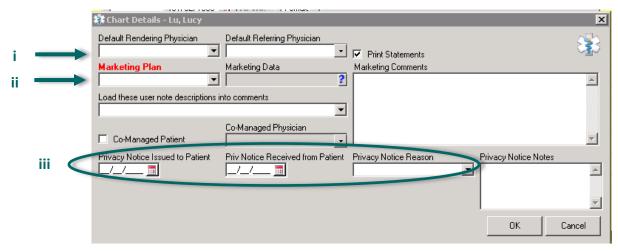






b. Chart Details

Review the information for accuracy and then click Chart.



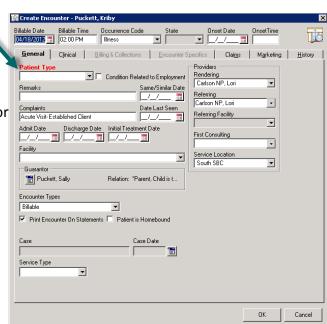
- i. Verify the *Default Rendering Physician* is correct or left blank.
- ii. Ask the patient how he/she found out about the SBC and choose the appropriate selection in the *Marketing Plan* field.
- iii. Verify the Privacy Notice dates and Privacy Notice Reason are complete. If not, fill these in now.
- iv. Click OK

4. Create Encounter

a. Select the *Patient Type*. The patient type is actually the **visit type**. Here are the visit types you can choose:



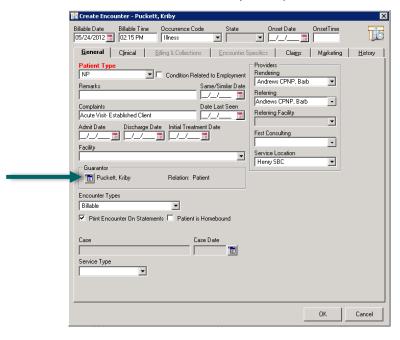
- Immunization
- MA Only
- MD
- Mental Health Counselor
- Mental Health Intern
- Not Ready Now
- NP
- RD
- RN Only
- Social Work
- SSI



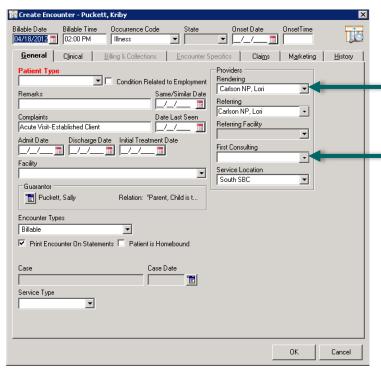




b. Make sure a Guarantor is selected. The Guarantor is always the patient.



- c. If there is not a Guarantor, click on the *Norton* button and select *Self as Guarantor*. Then select it as the default for all encounters.
- d. Under *Providers* make sure a *Rendering* Provider is selected. This is a licensed/credentialed NP, Mental Health Counselor or Dr. Chaisson. This is who the claim will be billed under.
- e. If another provider who is not licensed/credentialed is giving service under this encounter (MA, RN, Mental Health Intern, etc.), include this person as a *First Consulting* Provider.





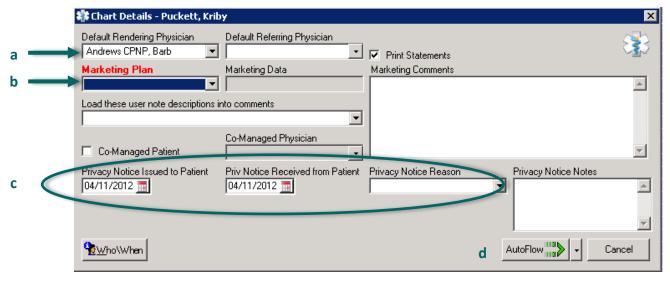


f. Click OK.

B. AutoFlow

You have now entered into the Check-in AutoFlow. This will ensure you properly check-in the patient for the appointment.

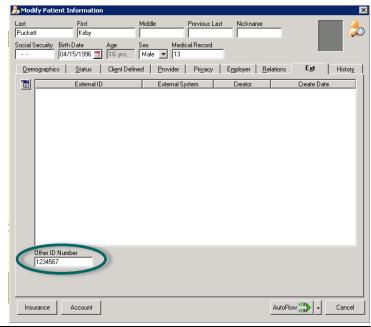
1. Chart Details



- a. Verify the Default Rendering Physician is correct or left blank.
- b. Ask the patient how they found out about the SBC and choose the appropriate selection in the *Marketing Plan* field.
- c. Verify the Privacy Notice dates and Privacy Notice Reason are complete. If not, fill these in now.
- d. Click on AutoFlow

2. Modify Patient Information: Ext Tab

- a. Ensure the Student ID Number is correct in the Other ID Number field by asking the student his/her ID number.
- b. Click on AutoFlow

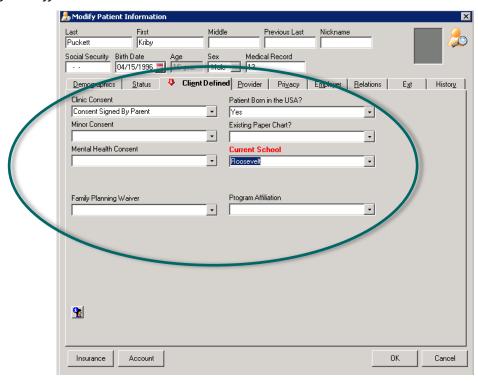




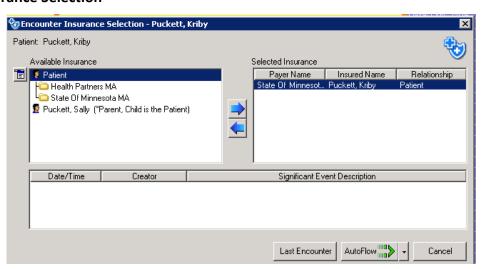


3. Modify Patient Information: Client Defined Tab

a. Make sure all fields are correct including all consent fields, *Existing Paper Chart?* and *Program Affiliation*.



- b. Click on AutoFlow
- 4. Modify Patient Information: Status Defined Tab
 - a. Make sure the Patient Status is Active
- 5. Encounter Insurance Selection



a. Make sure the Selected Insurance is correct.

Note: If the patient is having a confidential service, change the insurance to *Confidential Insurance*.





- b. To change insurance either select another insurance from the *Available Insurance* window, or right-click on the patient and select *New Insurance*.
- c. Click on AutoFlow

6. Print Labels



a. From the *Template* field, select *Encounter Fee Ticket* and select the number of labels you need.

Note: The Encounter Fee Ticket template should also be used for lab specimens and other forms.

- b. Double-check that the correct label printer for your clinic is selected and click on the *Print* button.
- c. Click on AutoFlow

7. Print Data Sheet

- a. This will automatically print to your clinic's 2055 printer.
- b. This should be given to the provider along with the Encounter Fee Ticket and Personal Health History form.
- c. You can also use this form to write down the patient's vitals.
- d. The data sheet should then be shredded after the appointment once the provider is finished with it.

8. Alerts

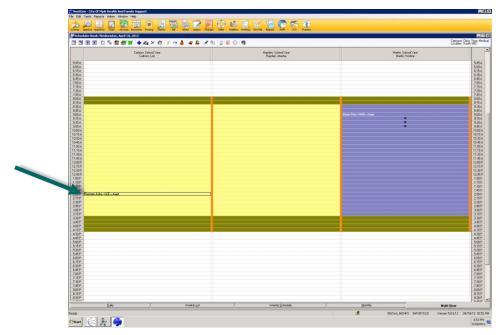
a. Review any Alerts for the patient (if applicable) and correct any issues.





C. Check-in

The appointment in the Appointment Book should now be crossed-out. This means the appointment is checked-in and you have completed the process!



Congrats! You are now done with this How-to Guide.