

Patient Portal Pre-Check-In

Thursday, May 29, 2025

Session Goals

1. Understand how to use pre-check-in within PCC EHR
2. Hear how other practices have managed their implementations & what they have learned
3. Identify ways to improve your system configuration and internal processes to make implementation smooth

Agenda

- Introductions
- Training Survey
 - <https://forms.gle/JM5ztyn4RA3Vwe7SA>
- Review of Portal Pre-Check-In
- Panelist Q&A
- Feedback on upcoming training sessions

Review of Pre-Check-In

- Part 1: What families will see in the Portal
- Part 2: What you will see in PCC EHR
- Part 3: Review configuration options & migration considerations

Portal User's Experience

The screenshot displays the PCC Patient Portal interface. At the top, there are three buttons: 'Sign Out', 'My Kid's Chart', and 'Settings'. Below these, a welcome message reads 'Welcome Daniel Wilson'. The main content area is divided into two sections: 'Patient Charts' and 'Upcoming Appointments'. The 'Patient Charts' section lists three patients: Andrew Wilson (02/06/22), Kellyn Wilson (12/29/19), and Jose M. Wilson (04/13/19) with a note '1 Unread Document'. The 'Upcoming Appointments' section is highlighted with a red box and shows an appointment for 'Thu 09/14/23 10:45am Kellyn'. Below the date, it says 'ADD Initial', 'Leonard McCoy, MD', and 'Burlington Peds - Old North End'. At the bottom of this section is an orange button labeled 'Kellyn - Start Pre-Check-In'.

Sign Out My Kid's Chart Settings

Welcome Daniel Wilson

Patient Charts

Andrew Wilson 02/06/22

Kellyn Wilson 12/29/19

Jose M. Wilson 04/13/19
● 1 Unread Document

Upcoming Appointments

Thu 09/14/23 10:45am Kellyn

ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

Kellyn - Start Pre-Check-In

When the billing account Patient Portal user (or additional pre-check-in recipient) logs into PCC's Patient Portal, they will find and click an orange "Start Pre-Check-In" button for each patient with an appointment scheduled within the next seven days.

Portal User's Experience

Back My Kid's Chart

Pre-Check-In for Kellyn
Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

▼ Patient Information Not Confirmed ⓘ

Name: Kellyn Wilson
Nickname:
Birthdate: 12/29/19
Sex: Female
Race: *Information requested*
Ethnicity: *Information requested*
Language: *Information requested*

Edit

Confirm

► Billing Account Not Confirmed ⓘ

► Insurance Not Confirmed ⓘ

Pre-Check-In Not Ready to Submit

Pre-Check-In is ready to submit when all sections are Confirmed.

Submit

Portal users have 3 areas to complete:

- Patient Information
- Billing Account
- Insurance

Portal users can click “Edit” to update existing info and add any requested information.

Portal User's Experience - Patient Information

Patient Information ...Editing

First Name
Kellyn

Middle Name (optional)

Last Name
Wilson

Suffix, such as Jr. or III (optional)

Nickname (optional)

Birthdate
12/29/19

Sex
Female

Race
Missing information is highlighted orange

Ethnicity

Preferred Language
+

Confirm

When editing, any information missing is highlighted in orange.

Portal User's Experience - Patient Information

Patient Information *...Editing*

First Name
Kellyn

Middle Name (optional)

Last Name
Wilson

Suffix, such as Jr. or III (optional)

Nickname (optional)

Birthdate
12/29/19

Sex
Female

Race
White

Ethnicity
Prefers not to answer

Preferred Language
English

Confirm

Once all information is entered, click "Confirm"

The information already on file for this patient can be edited by the portal user.

After completing any edits to Patient Information and any requested information is filled out, the user will click "Confirm" to save the changes.

Portal User's Experience - Billing Account

[Back](#) [My Kid's Chart](#)

Pre-Check-In for Kellyn
Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

[Patient Information](#) Confirmed ✓

[Billing Account](#) Not Confirmed !

Billing Account: **Daniel Wilson**

Address: RD 7 Box 006
Saxtons River, VT 05154

Home Phone: (802) 555-0183

Work Phone: (802) 555-0109

Cell Phone: (802) 555-0194

Emg Phone: (802) 555-0104

Email: *Information requested*

[Edit](#)

[Confirm](#)

The Billing Account section works the same way as Patient Information: the user will edit any existing information, fill out any orange highlighted missing information, and then click “Confirm”.

Portal User's Experience - Insurance

[Back](#) [My Kid's Chart](#)

Pre-Check-In for Kellyn
Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

> Patient Information

Confirmed ✓

> Billing Account

Confirmed ✓

Insurance

Not Confirmed ⓘ

Insurance: BCBS \$30 OV&WC-other

Subscriber: Mark Wilson
Certificate: SBR186667814
Group: WIL427
Start Date: 12/22/20
Status: Active
Card Images: *Information requested*

Edit

Add Insurance

Confirm

Pre-Check-In

Not Ready to Submit

Pre-Check-In is ready to submit when all sections are Confirmed

In Insurance, users can click “Edit” to confirm that the existing insurance is still active, or mark it as expired if it’s no longer valid. By clicking “Add Insurance” users can enter a new insurance.

Portal User's Experience - Insurance

The screenshot shows a web interface for managing a child's insurance. At the top, there is a 'Back' button and a title 'My Kid's Chart'. Below this is a section for 'Pre-Check-In for Kellyn' with appointment details. The 'Insurance' section is highlighted with a grey bar and an '...Editing' link. It contains a table with insurance details. A callout box points to the 'Insurance' column header, stating 'Insurance can be marked as Active or Expired'. Below the table is a 'Status' section with two radio buttons: 'Active' (selected) and 'Expired'. A second callout box points to the 'Attach a Photo or PDF' button for the front of the insurance card, stating 'Click to attach a photo or PDF of an insurance card'. At the bottom, there are two more 'Attach a Photo or PDF' buttons for the back of the card, and a large blue 'Save' button.

Back My Kid's Chart

Pre-Check-In for Kellyn
Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

Insurance ...Editing

Insurance
Insurance: BCBS \$30 OV&WC-other Subscriber: Mark Wilson ID: SBR186667814 DOB: Wil427 Exp: 12/22/20

Status
☒ Active (This is still the patient's insurance.)
☐ Expired (This is not the patient's insurance.)

Card Images
Attach a photo of the FRONT of the insurance card.
Attach a Photo or PDF
Attach a photo of the BACK of the insurance card.
Attach a Photo or PDF
Save

Insurance can be marked as Active or Expired

Click to attach a photo or PDF of an insurance card

Both “Add Insurance” and “Edit” include the option to upload an image or PDF of the front and back of the patient’s insurance card. These images will be added to an automatically created “Pre-Check-In Insurance Cards” category in PCC EHR, or to a document category selected in Document Administration.

Portal User's Experience

Back My Kid's Chart

Pre-Check-In for Kellyn

Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

> Patient Information	Confirmed ✓
> Billing Account	Confirmed ✓
Pre-Check-In	Confirmed ✓
Ready to Submit	

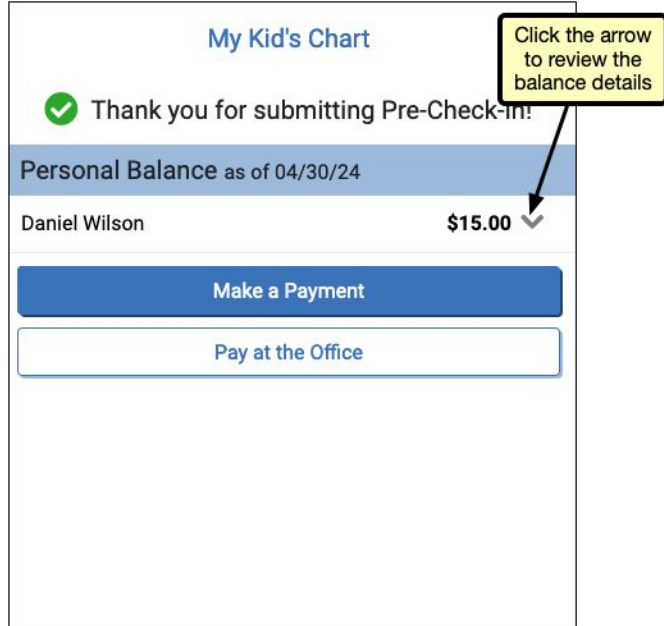
Pre-Check-In is ready to submit when all sections are Confirmed.

Submit

Once each section is completed and confirmed, click "Submit"

When all three sections have been completed and confirmed, each will be marked "Confirmed" in green, but can be edited again by re-opening the section and clicking "Edit" if needed.

Portal User's Experience - Pay Personal Balance



My Kid's Chart

✓ Thank you for submitting Pre-Check-In!

Personal Balance as of 04/30/24

Daniel Wilson	\$15.00 ✓
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Make a Payment

Pay at the Office

Click the arrow to review the balance details

If your office has enabled portal payments, the Pre-Check-In confirmation page includes the option to make a payment for any patient with a personal balance.

Portal User's Experience - Pay Personal Balance

The screenshot displays a patient portal interface for 'My Kid's Chart'. It includes a confirmation message, a personal balance summary for Daniel Wilson, a detailed charge breakdown for a visit on 02/24/24, and two primary action buttons: 'Make a Payment' and 'Pay at the Office'. Callout boxes provide instructions for each button.

My Kid's Chart

✓ Thank you for submitting Pre-Check-In!

Personal Balance as of 04/30/24

Daniel Wilson **\$15.00** ^

Kellyn Wilson (Dr. Williams, New NE)

02/24/24	OV Comprehensive
Total Charge	\$160.00
Payments/Adjustments	-\$0.00
Pending Insurance	-\$145.00
Personal Balance	\$15.00

Total Personal Balance **\$15.00**

This is not a bill and may not reflect the entire account balance.

Make a Payment

[Pay at the Office](#)

Click "Make a Payment" to open the payment screen

Click "Pay at the Office" to return to the Patient Portal home screen

Users can review the details of the balance by clicking the arrow next to the balance. The "Make a Payment" button opens the payment screen, where the portal user can complete a payment. If the user prefers to pay at the office, clicking the "Pay at the Office" button will return the user to the patient portal home screen.

Pre-Check-in in PCC EHR

PCC EHR

FIND

Schedule (11)

Visit Tasks (99+)

E-lab Results (40)

◀

Wed 01/17/24

Visit Status	Room	Tasks	Arrival	Time	Last	First
Scheduled				8:00am	James D.D.S.	Heather "Cole" Danielle
Scheduled				8:00am	Lescavage	Alison Lee
 Scheduled				8:00am	Wilson	Jose M.
Scheduled				8:00am	Peller	Erin Marie
Scheduled				8:15am	Guidarelli Sr.	Christophe "Ty" Lee
 Scheduled				8:15am	Wilson	Andrew
Scheduled				8:30am	Denicholas II.	Caitlyn "Lee" Leigh
 Scheduled				8:30am	Wilson	Kellyn
Scheduled				8:45am	Jones	Cindy

A visit's Pre-Check-In status is indicated on the Schedule queue by a clipboard icon.

Pre-Check-in in PCC EHR

Status Details:

- An empty, gray clipboard icon indicates a visit where Pre-Check-In is available through the Patient Portal, but has not yet been completed by a user.
- A filled, orange clipboard appears on visits where Pre-Check-In has been completed through the Patient Portal, but not yet reviewed and imported by your practice.
- The checked, green clipboard signifies that Pre-Check-In is complete and imported.
- Visit reasons not configured for Pre-Check-In will have no icon.

Pre-Check-in in PCC EHR

▼ Pre-Check-In

Patient Demographics	Current	Pre-Check Information
Name	Kellyn Wilson	Kellyn Wilson
Nickname		
Date of Birth	12/29/19	12/29/19
Sex	Female	Female
Race		☒ White
Ethnicity		☒ Prefers not to answer
Pref. Language		☒ English

Account Demographics	Current	Pre-Check Information
Name	Daniel Wilson	Daniel Wilson
Address	RD 7 Box 006 Saxtons River, VT 05154	RD 7 Box 006 Saxtons River, VT 05154
Home Phone	802-555-0183	802-555-0183
Work Phone	802-555-0109	802-555-0109
Cell Phone	802-555-0194	802-555-0194
	802-555-0104	802-555-0104

	Current	Pre-Check Information
Insurance	BCBS \$30 OV&WC-other	BCBS \$30 OV&WC-other
Status	Active	Active
Card Image		☒ View Image

Import Pre-Check information submitted by Daniel Wilson (Guardian) 09/13/23 10:26am

Information submitted during pre-check-in appears in orange

Checked items will be imported to the patient's record

Submitted card images can be viewed by clicking "View Image"

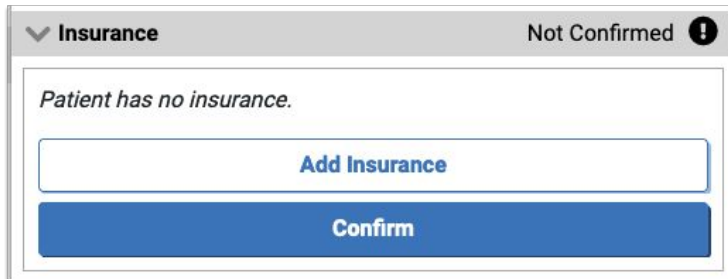
Clicking import will accept all information with a checkmark and completes pre-check-in

When a portal user completes Pre-Check-In in PCC's Patient Portal, the submitted information appears in Patient Check-In. All information added, edited, and confirmed by the portal user appears under the rightmost "Pre-Check Information" column. New or updated information appears in orange, with a checkbox.

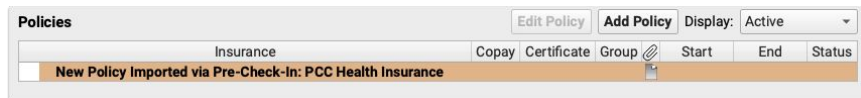
By default, each checkbox is checked. If you decide that the submitted pre-check-in information should not be imported, uncheck the box. Insurance card images can be viewed by clicking the "View Image" button.

Click "Import" to import all checked information and overwrite the current information.

Pre-Check-in in PCC EHR



A dialog box titled "Insurance" with a "Not Confirmed" status and an exclamation mark icon. The message inside says "Patient has no insurance." Below the message are two buttons: "Add Insurance" and "Confirm".



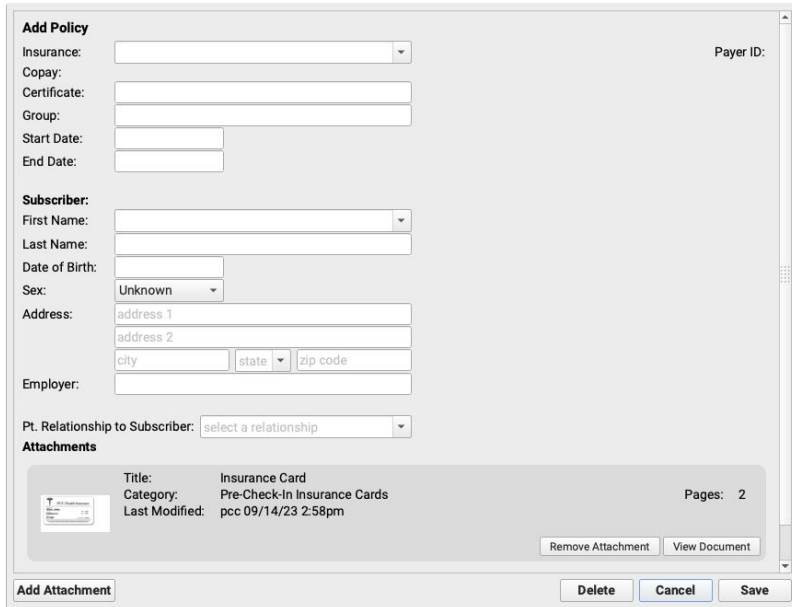
A screenshot of the "Policies" table in the PCC EHR system. The table has columns for Insurance, Copay, Certificate, Group, Start, End, and Status. A new policy has been added, highlighted in orange, with the text "New Policy Imported via Pre-Check-In: PCC Health Insurance".

Insurance	Copay	Certificate	Group	Start	End	Status
New Policy Imported via Pre-Check-In: PCC Health Insurance						

If, during pre-check-in, a patient has no insurance, or a user adds an additional insurance, you'll need to add that insurance during Check-In through PCC EHR.

A "New Policy Imported via Pre-Check-In" line appears under the Policies component in PCC EHR.

Pre-Check-in in PCC EHR



The screenshot shows a web-based form for adding a policy in the PCC EHR system. The form is organized into several sections:

- Add Policy:** Includes fields for Insurance (dropdown), Copay, Certificate, Group, Start Date, and End Date. A Payer ID field is located to the right.
- Subscriber:** Includes fields for First Name, Last Name, Date of Birth, Sex (dropdown with 'Unknown' selected), Address (with address 1 and address 2 lines), city, state (dropdown), and zip code. An Employer field is also present.
- Pt. Relationship to Subscriber:** A dropdown menu with the text 'select a relationship'.
- Attachments:** A section showing a list of attachments. The first attachment is titled 'Insurance Card', categorized as 'Pre-Check-In Insurance Cards', and was last modified on 'pcc 09/14/23 2:58pm'. It has 2 pages. Below the list are 'Remove Attachment' and 'View Document' buttons.
- Footer:** Includes an 'Add Attachment' button on the left and 'Delete', 'Cancel', and 'Save' buttons on the right.

Select the policy and click “Edit Policy” to open and enter the details of the policy.

The images submitted via pre-check-in appear at the bottom of the window, click “View Document” to review the insurance cards for the insurance details.

Pre-Check-in in PCC EHR

Add Policy

Insurance:		Payer ID:
Copay:	Autofill Dana's Policy: BCBS \$30 OV&WC-other (PO Box 890062, Camphill, PA 17089-0062)	
Certificate:	Autofill Kellyn's Policy: BCBS \$30 OV&WC-other (PO Box 890062, Camphill, PA 17089-0062)	
Group:	Aetna 10 Capitated (P.O. Box 91522, Arlington, TX 76015-0022)	
	Aetna 10 Schedule B (P.O. Box 91522, Arlington, TX 76015-0022)	
Start Date:	Aetna EPO \$10 Box 91522 (P.O. Box 91522, Arlington, TX 76015-0022)	
	Aetna EPO \$15 Box 91522 (P.O. Box 91522, Arlington, TX 76015-0022)	
End Date:	Aetna HDHP (PO Box 981106, El Paso, TX 79998-1106)	
	Aetna Managed/Elect Generic	
Subscriber:	Aetna MC \$10 3541 Winchester (3541 Winchester Rd, Allentown, PA 18195-0501)	

If the patient has siblings and the insurance is the same as those siblings, the sibling's policy will appear at the top of the Insurance drop-down menu, and will automatically fill in the policy details.

Pre-Check-in in PCC EHR

▼ **Pre-Check-In** ✓ Imported by Zelda Zen, LNA 09/14/23 3:00pm

Patient Demographics	Before Import	Pre-Check Information
Name	Jeremy Wilson	Jeremy Wilson
Nickname		
Date of Birth	05/15/10	05/15/10
Sex	Male	Male
Race		✓ White
Ethnicity		✓ Prefers not to answer
Pref. Language		✓ English
Account Demographics	Before Import	Pre-Check Information
Name	Daniel Wilson	Daniel Wilson
Address	RD 7 Box 006 Saxtons River, VT 05154	RD 7 Box 006 Saxtons River, VT 05154
Home Phone	802-555-0183	802-555-0183
Work Phone	802-555-0109	802-555-0109
Cell Phone	802-555-0194	802-555-0194
Emg Phone	802-555-0104	802-555-0104
Email		✓ daniel@example.com
New Insurance Policy	Before Import	Pre-Check Information
Insurance		✓ PCC Health Insurance, Image

Pre-Check information submitted by Daniel Wilson 09/14/23 2:58pm

With pre-check-in data imported, and any new insurance added, pre-check-in is complete, and you can continue your check-in process as usual.

Policies							Edit Policy	Add Policy	Display:	Active
	Insurance	Copay	Certificate	Group	Start	End	Status			
▶	1. BCBS \$30 OV&WC-oth...	\$30.00	SBR103385379001	WI427	12/21/20		Active			

Pre-Check-in User Management

Billing Account Reassign Account		Billing Account Information	
Angela Wilson (Account # 1421)		Account Flags:	
First Name:	Angela	EMG Contact:	
Last Name:	Wilson	EMG Phone #:	
Address		Alt Last Name:	
Rd #5, Box 35		Mother Employer:	
address 2		Father Employer:	
Thetford Center	VT 05075	Pharmacy #:	
Phone		Recent Financial History	
Home Phone:	802-555-0120	Last Service:	05/09/24
Work Phone:	802-555-0197	Last Bill Sent:	08/10/20
Cell Phone:	802-555-0176	Last Pers. Pmt:	02/10/21
Emg Phone:	802-555-0136	Last Ins. Pmt:	05/15/21
Email:	angwilson@example.com	Hold Bill Until:	
Billing Account's Portal User		Budget Amt:	\$
Name: Angela Wilson (Guardian)		Last Login: 11/19/24 12:59pm	
Sign In: angwilson@example.com		Identity Verification: Verified	
Portal Notifications: angwilson@example.com		Unread Messages: 0	
Balances: Angela Wilson (Account # 1421)		Unviewed Documents: 0	
Pre-Check-In Recipient		Unlink Manage	
Billing Account:	Angela Wilson (Guardian)		
Additional Recipient:	none		
Recipients can see and edit the Billing Account name, address, phone numbers, and email.			

When a patient has more than one patient portal user associated with their account, those additional patient portal accounts can be added to Pre-Check-In, and complete Pre-Check-In from their own account.

When Pre-Check-In is enabled, a component called “Pre-Check-In Recipient” appears in each patient’s demographics component. In edit mode, it includes a drop-down menu listing all other patient portal users linked to the patient.

Pre-Check-in User Management

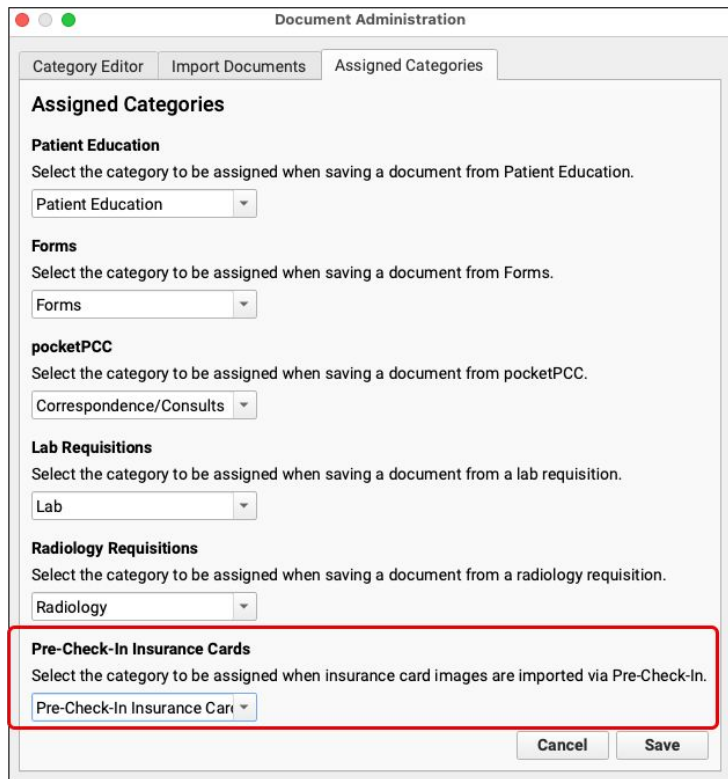
Billing Account's Portal User		Unlink	Manage
Name:	Angela Wilson (Guardian)	Last Login:	11/19/24 12:59pm
Sign In:	angwilson@example.com	Identity Verification:	Verified
Portal Notifications:	angwilson@example.com	Unread Messages:	0
Balances:	Angela Wilson (Account # 1421)	Unviewed Documents:	0

Pre-Check-In Recipient	
Billing Account:	Angela Wilson (Guardian)
Additional Recipient:	none none Daniel Wilson (Guardian) daniel@example.com

Select an patient portal user linked to this patient to receive the Pre-Check-In notification and option to complete Pre-Check-In.

After selecting a user and saving your changes, additional users can be added the same way.

Pre-Check-in Configuration: Document Category



Document Administration

Category Editor | Import Documents | Assigned Categories

Assigned Categories

Patient Education
Select the category to be assigned when saving a document from Patient Education.
Patient Education

Forms
Select the category to be assigned when saving a document from Forms.
Forms

pocketPCC
Select the category to be assigned when saving a document from pocketPCC.
Correspondence/Consults

Lab Requisitions
Select the category to be assigned when saving a document from a lab requisition.
Lab

Radiology Requisitions
Select the category to be assigned when saving a document from a radiology requisition.
Radiology

Pre-Check-In Insurance Cards
Select the category to be assigned when insurance card images are imported via Pre-Check-In.
Pre-Check-In Insurance Cards

Cancel Save

When Pre-Check-In is enabled, a new document category called “Pre-Check-In Insurance Cards” is automatically created. By default, insurance card images are added to this category. ***If you already have an insurance card category, PCC highly recommends that you use that existing category, as the annual insurance card request is tied to this function.***

Pre-Check-In Insurance Cards appears at the bottom of the Assigned Categories tab. Select your existing category in the drop-down menu, and click save.

Pre-Check-in Configuration: Visit Reasons

Visit Reason Configuration

Visit Reasons | Visit Types | Defaults

Visit Reasons

Provider: All Search Filter:

Visit Type	Visit Reason	Pre-Check-In	Dr. Woodward
Well	Ex Well Visit	Yes	15 min
Sick	Extended Sick Call	Yes	15 min
	Flu Vaccine	Yes	15 min
	Hosp Newborn	Yes	15 min
	Hospital Visit	Yes	15 min
	Immunization		15 min
	Injury		15 min
Consult	Introductory Visit	Yes	15 min
	Lab Only	Yes	15 min

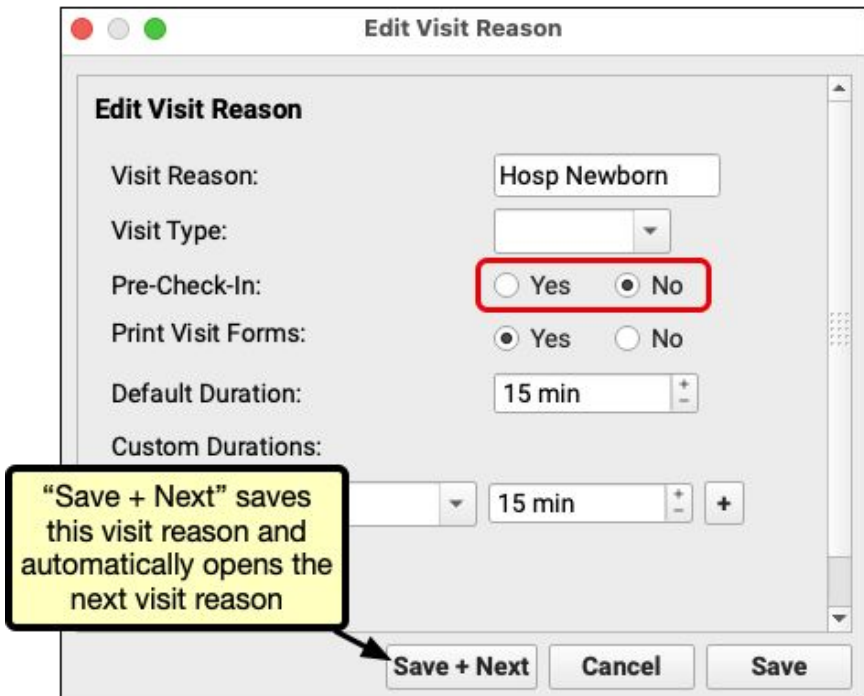
Select a visit reason, then click edit

Add Delete Edit Configure Pre-Check-In Close

PCC EHR's Visit Reason Editor includes two Pre-Check-In configuration options, so your practice can set which visit reasons should use Pre-Check-In and which should not.

By default, all visit reasons are set to use Pre-Check-In. Open Visit Reasons from PCC EHR's Configuration menu. In Visit Reason Configuration, select a visit and click "Edit".

Pre-Check-in Configuration: Visit Reasons



The screenshot shows a window titled "Edit Visit Reason". It contains several fields: "Visit Reason:" with a text box containing "Hosp Newborn"; "Visit Type:" with a dropdown menu; "Pre-Check-In:" with radio buttons for "Yes" and "No", where "No" is selected and highlighted by a red rectangle; "Print Visit Forms:" with radio buttons for "Yes" and "No", where "Yes" is selected; "Default Duration:" with a text box containing "15 min"; and "Custom Durations:" with a dropdown menu, a text box containing "15 min", and a "+" button. At the bottom are three buttons: "Save + Next", "Cancel", and "Save". A yellow callout box with a black border and an arrow pointing to the "Save + Next" button contains the text: "Save + Next saves this visit reason and automatically opens the next visit reason".

Edit Visit Reason includes a “Pre-Check-In” line with a “Yes” and “No” button. Selecting “No” will disable Pre-Check-In for the selected visit reason.

Patients scheduled with a visit reason set to “No” will not find the orange “Start Pre-Check-In” button when they log into the Patient Portal and will not receive the notification inviting them to complete Pre-Check-In.

Click “Save” to save your work and close the window or click “Save + Next” to save and automatically edit the next visit reason in your list.

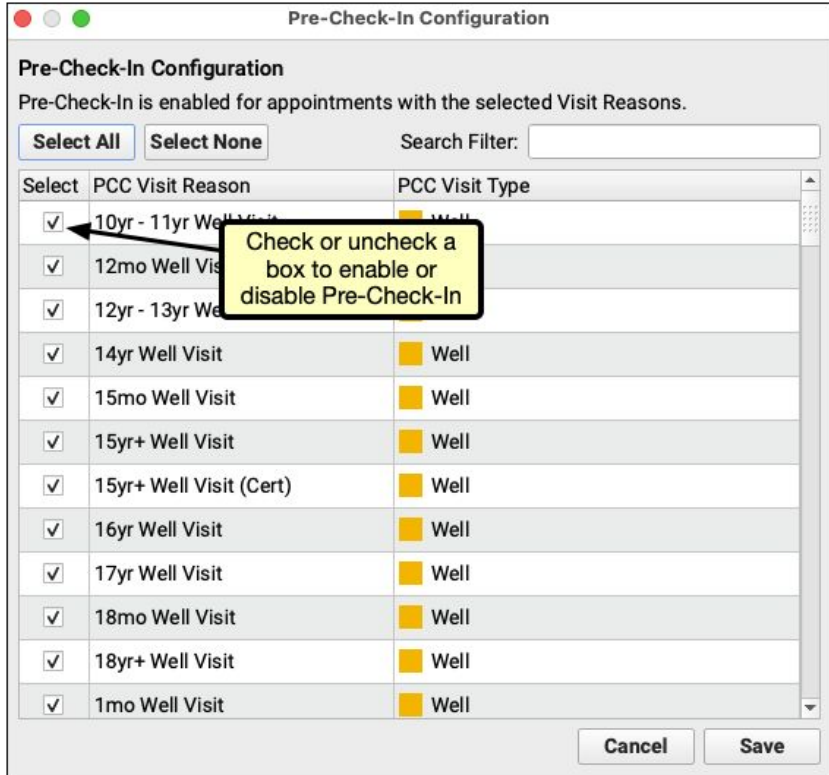
Pre-Check-in Configuration: Visit Reasons

The screenshot shows a window titled "Visit Reason Configuration" with three tabs: "Visit Reasons", "Visit Types", and "Defaults". The "Visit Reasons" tab is active. Below the tabs, there is a "Provider:" dropdown menu set to "All" and a "Search Filter:" text box. A table lists various visit reasons with columns for "Visit Type", "Visit Reason", "Pre-Check-In", and "Dr. Woodward". The "Pre-Check-In" column contains "Yes" for all listed reasons. At the bottom of the window, there are buttons for "Add", "Delete", "Edit", "Configure Pre-Check-In", and "Close". The "Configure Pre-Check-In" button is highlighted with a red rectangular box.

Visit Type	Visit Reason	Pre-Check-In	Dr. Woodward
Well	10yr - 11yr Well Visit	Yes	15 min
Well	12mo Well Visit	Yes	15 min
Well	12yr - 13yr Well Visit	Yes	15 min
Well	14yr Well Visit	Yes	15 min
Well	15mo Well Visit	Yes	15 min
Well	15yr+ Well Visit	Yes	15 min
Well	15yr+ Well Visit (Cert)	Yes	15 min
Well	16yr Well Visit	Yes	15 min
Well	17yr Well Visit	Yes	15 min
Well	18mo Well Visit	Yes	15 min
Well	18yr+ Well Visit	Yes	15 min

You can configure multiple visit reasons by clicking “Configure Pre-Check-In” on the Visit Reason Configuration window.

Pre-Check-in Configuration: Visit Reasons



Pre-Check-In Configuration

Pre-Check-In is enabled for appointments with the selected Visit Reasons.

Select All **Select None** Search Filter:

Select	PCC Visit Reason	PCC Visit Type
☒	10yr - 11yr Well Visit	Well
☒	12mo Well Visit	Well
☒	12yr - 13yr Well Visit	Well
☒	14yr Well Visit	Well
☒	15mo Well Visit	Well
☒	15yr+ Well Visit	Well
☒	15yr+ Well Visit (Cert)	Well
☒	16yr Well Visit	Well
☒	17yr Well Visit	Well
☒	18mo Well Visit	Well
☒	18yr+ Well Visit	Well
☒	1mo Well Visit	Well

Cancel **Save**

Check or uncheck a box to enable or disable Pre-Check-In

Pre-Check-In Configuration lists all your Visit Reasons with a column of checkboxes. Use the Search Filter to narrow the list to the visit reasons you need, or work through the list line by line. Unchecking a box will disable Pre-Check-In for that visit reason.

Pre-Check-in: Considerations

There are a few conditions that may affect your decision to begin using Pre-Check-In in its current version:

- Pre-Check-In needs to be completed individually for each patient, so accounts with multiple patients with appointments on the same day will need to enter and confirm information multiple times.
- The information requested fields cannot be edited or removed, and no additional fields can be added.
- Pre-Check-In is available within Patient Portal seven days before an appointment, and a notification is sent to the Portal user two days before the appointment. This timeline cannot be changed.
- Multiple Patient Portal users can complete Pre-Check-In. Use the Pre-Check-In Recipient component to allow additional portal users to complete Pre-Check-In.
- Accounts with a privacy-enabled patient can complete Pre-Check-In. Add privacy-enabled patients in the Pre-Check-In Recipient component. Use the relationship of “Self” when creating a portal account for a privacy-enabled patient. Only the patient should have the relationship of “Self.”

Pre-Check-in: Prerequisites

To use Portal Pre-Check-In, clients must also be using:

- Appointment Book
- Patient Check-In via PCC EHR
- Patient Portal

Pre-Check-in: Review Your Practice Workflows

To get started with Portal Pre-Check-In, clients should:

- Review Phone Numbers
 - If you place shorthand like “mom” or “dad” after a phone number to denote who a phone number belongs to, this will not work with pre-check-in. Contact PCC Support to discuss alternate options for number tracking.
- Review Notifications
 - Pre-check-in sends notifications at 48 hours in advance of the appt. You may want to adjust your notification batches and cadence accordingly.
- Review Eligibility Processes
 - Users can submit updated insurance information through Pre-Check-In. Be prepared to review any Pre-Check-In results when checking Insurance Eligibility.

Panelist Questions

Panelist Introduction

- Shana Loterbauer - Pearland Pediatrics (TX)

EHR Configuration

- What EHR system settings and configuration did you update as part of the move to pre-check-in?
- How did you manage accounts and pre-check-in access?
 - Has this changed since we added the function for additional pre-check-in recipients?

Internal Processes

- What workflows did you change or add to use pre-check-in?
- How do you track pre-check-in completion?
- How have staff responded to the integration and change to processes?
- How have you ensured good office-wide communication about plans and processes?
- How have your families responded to this functionality?

Open Q&A

Feedback

Ensure Success Education Sessions - Live Polling



Join at
slido.com
#3705 335

Resources

You can learn more about the Portal Pre-Check-In by visiting learn.pcc.com.

- [Portal Pre-Check-In](#)

Thank you for attending!