Patient Portal Pre-Check-In

Thursday, May 29, 2025

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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

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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

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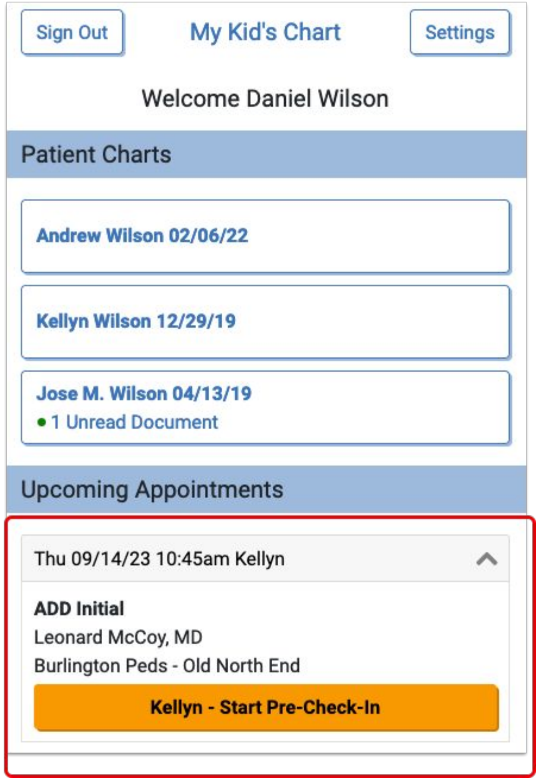
Portal User’s Experience



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.

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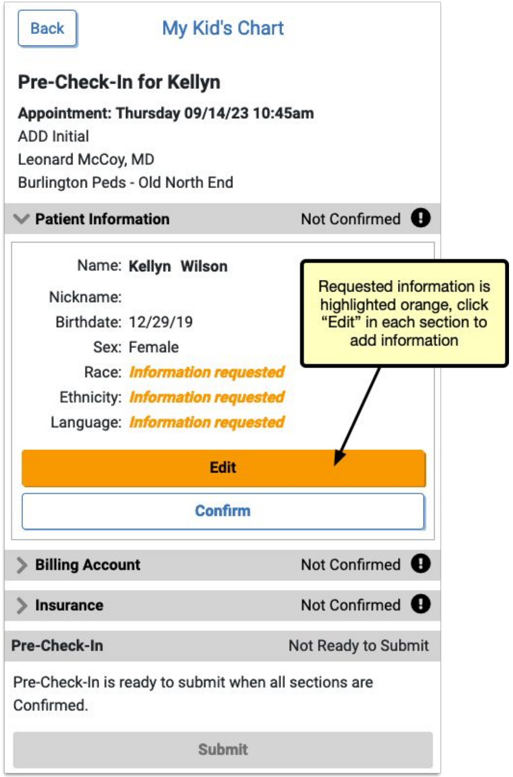
Portal User’s Experience



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.

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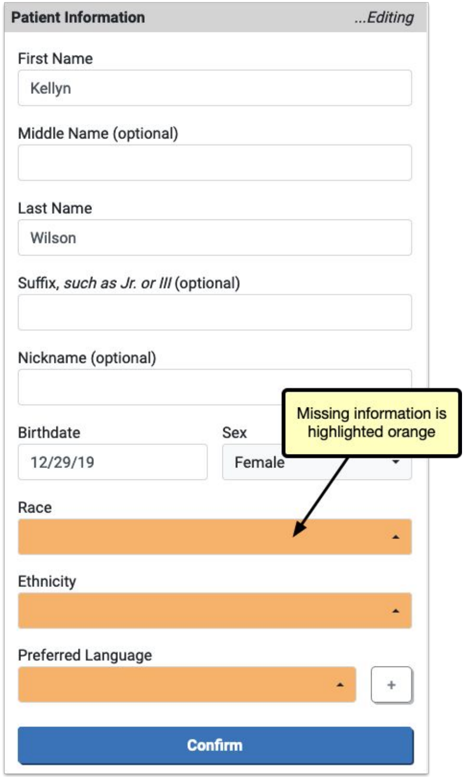
Portal User’s Experience - Patient Information



When editing, any information missing is highlighted in orange.

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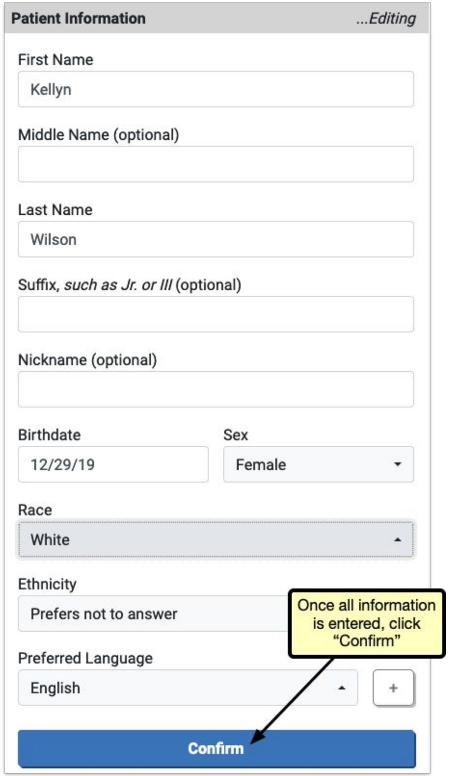
Portal User’s Experience - Patient Information



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.

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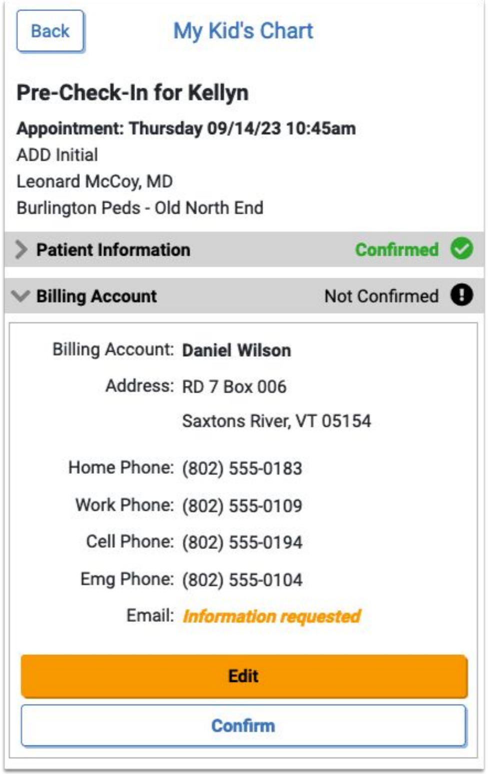
Portal User’s Experience - Billing Account



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”.

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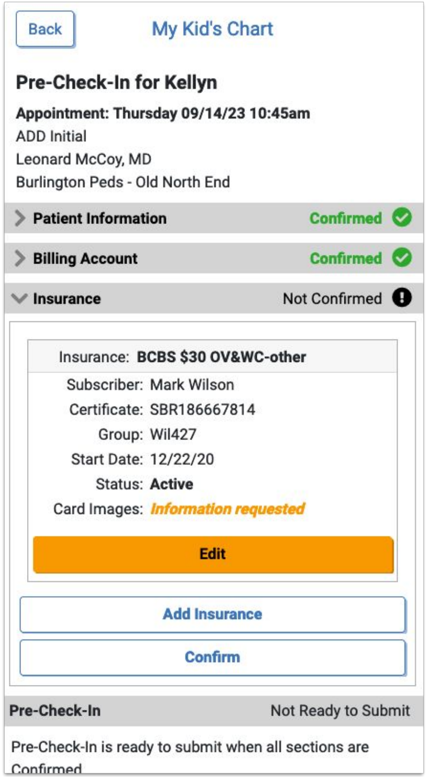
Portal User's Experience - Insurance



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.

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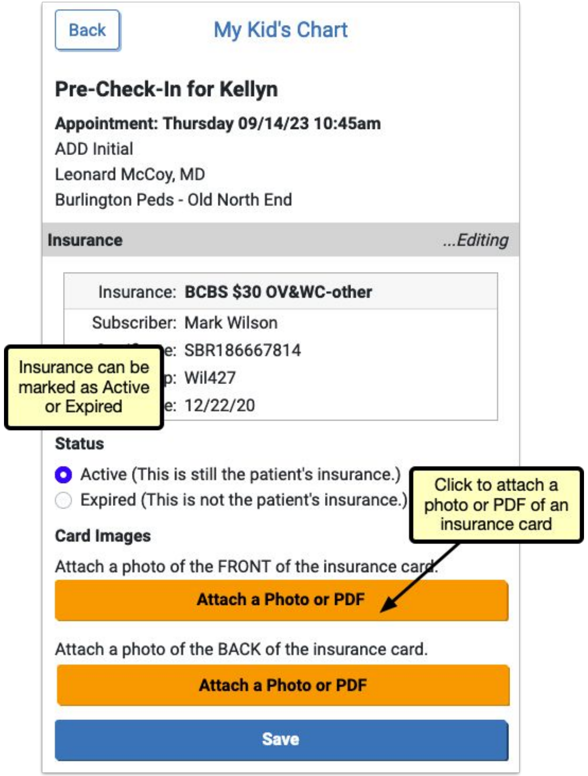
Portal User's Experience - Insurance



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.

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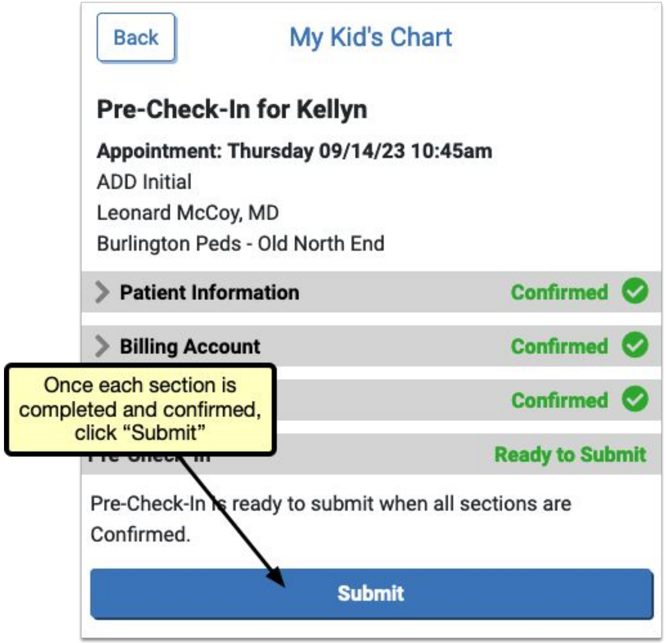
Portal User's Experience



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.

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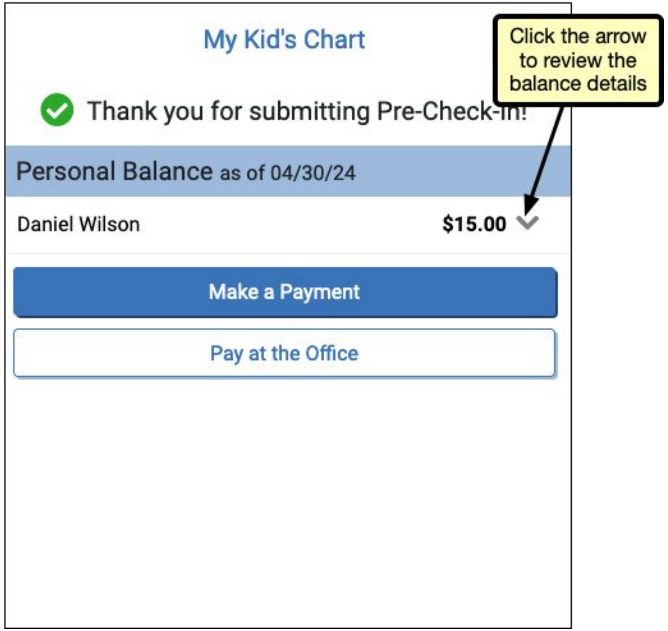
Portal User's Experience - Pay Personal Balance



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.

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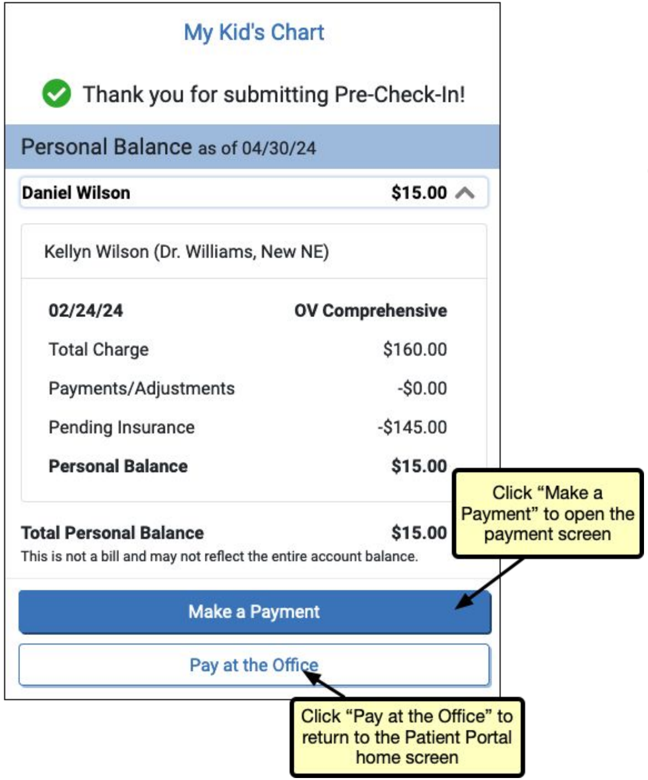
Portal User’s Experience - Pay Personal Balance



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.

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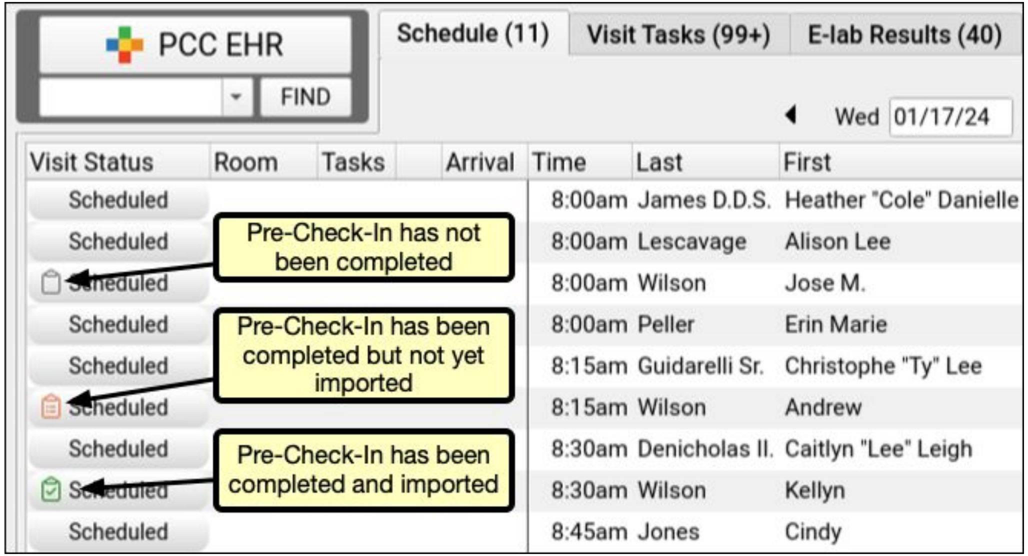
Pre-Check-in in PCC EHR



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

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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.

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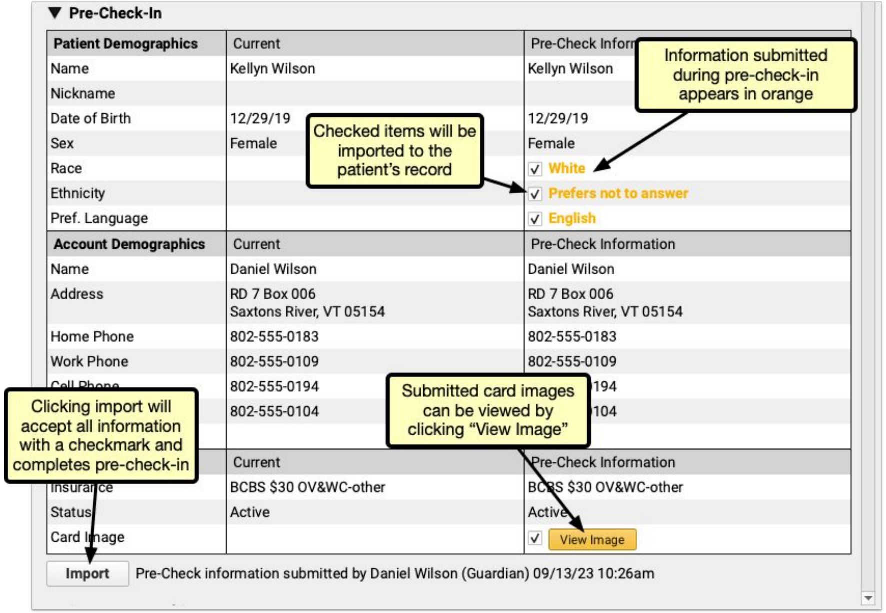
Pre-Check-in in PCC EHR

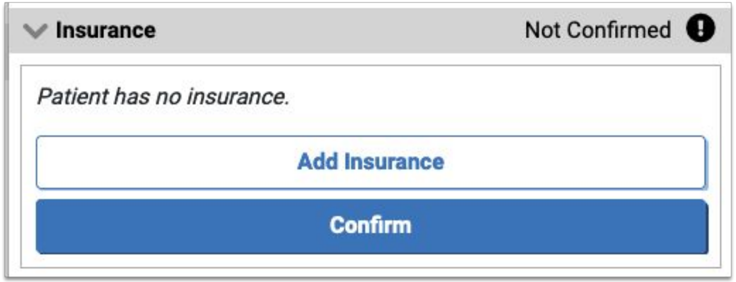


When a portal user completes Pre-Check-In in PCC's Patient Portal, the submitted information appears in Patient Check-In. All information added, edited, and confirmed by the portal user appears under the rightmost "Pre-Check Information" column. New or updated information appears in orange, with a checkbox.

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



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.

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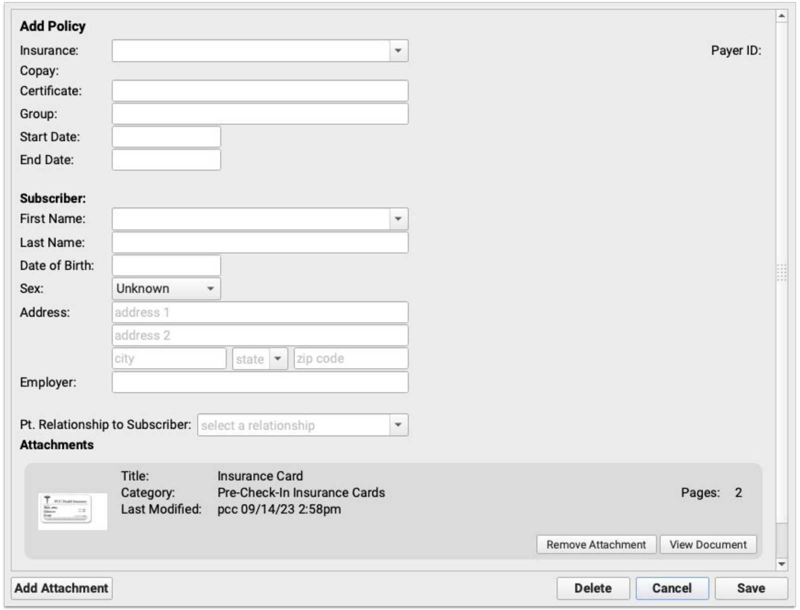
Pre-Check-in in PCC EHR



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.

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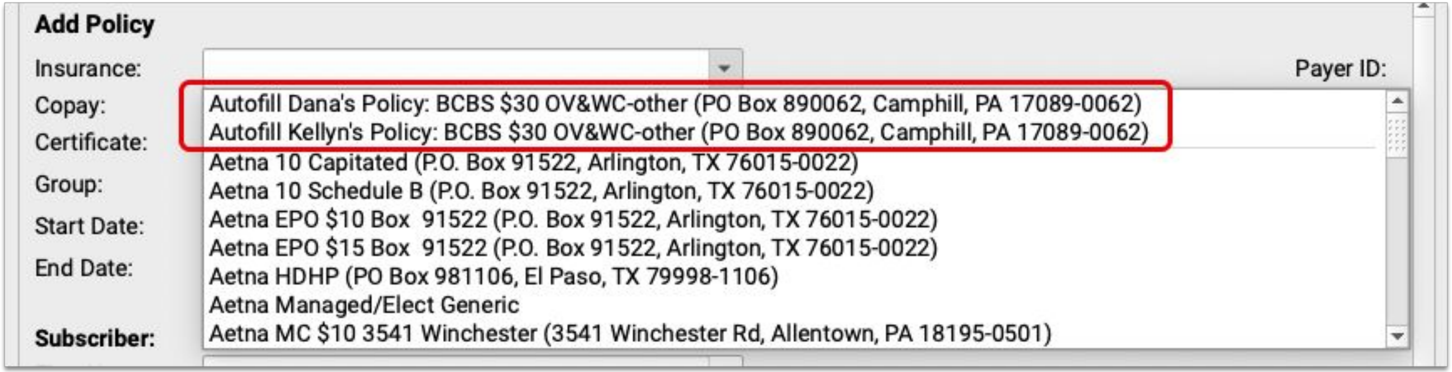
Pre-Check-in in PCC EHR



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.

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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

Policies Edit Policy Add Policy Display: Active

Insurance	Copay	Certificate	Group		Start	End	Status
1. BCBS $30 OV&WC-oth...	$30.00	SBR103385379001	Wil427		12/21/20		Active

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.

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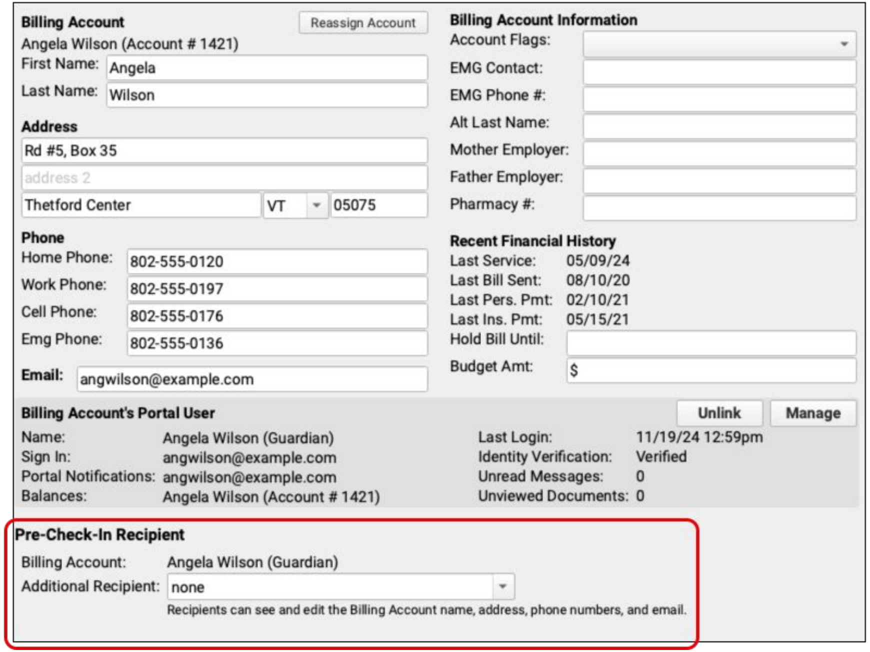
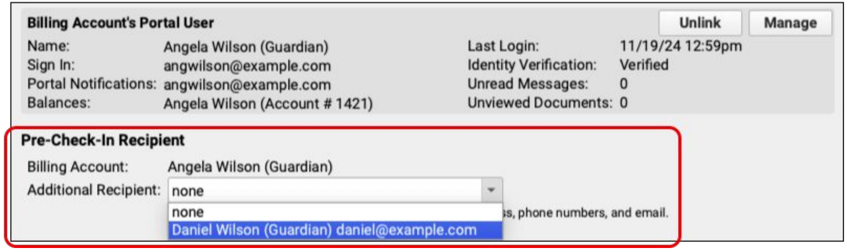
Pre-Check-in User Management



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



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.

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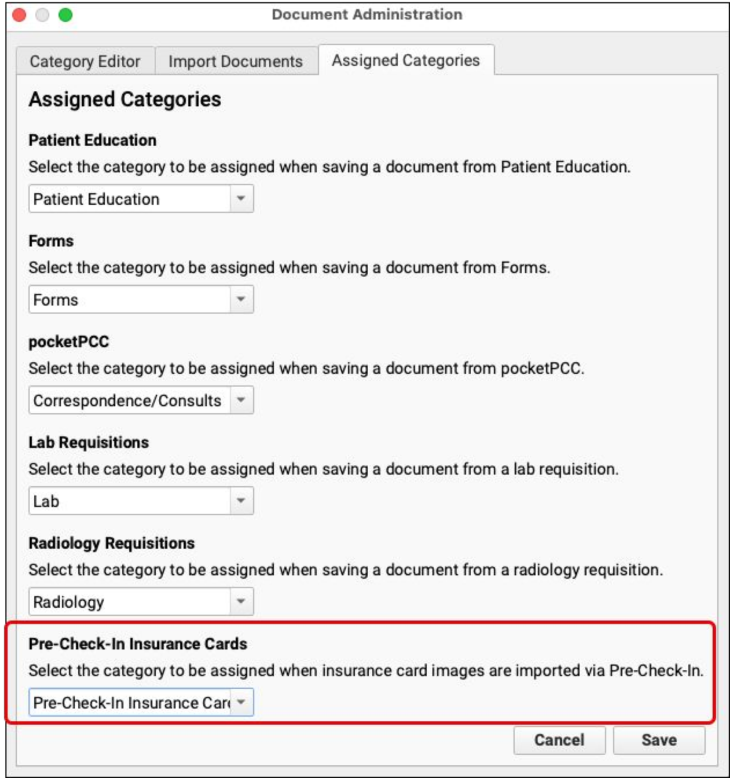
Pre-Check-in Configuration: Document Category



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.

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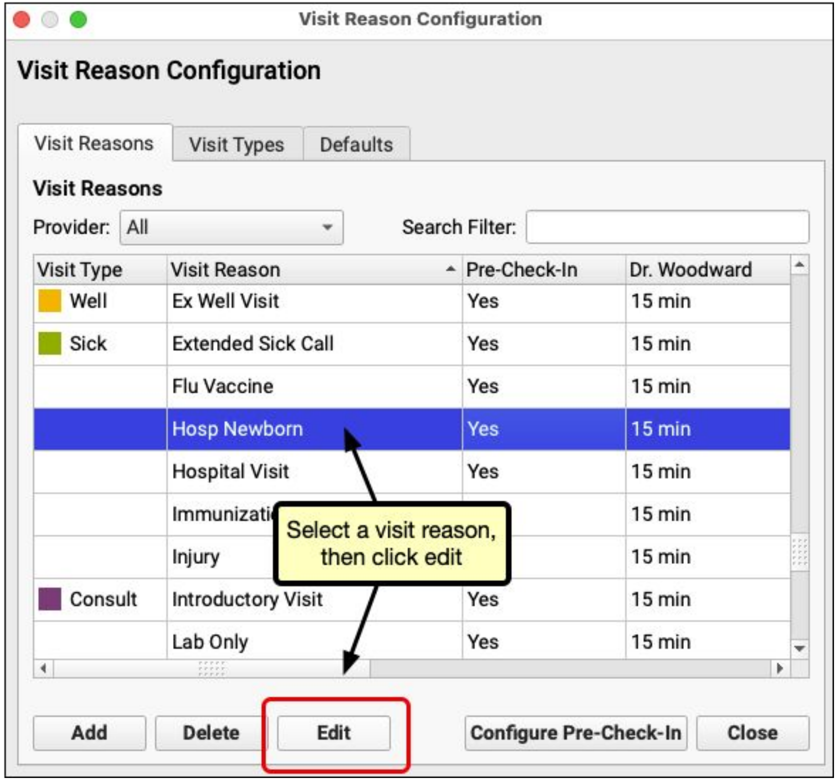
Pre-Check-in Configuration: Visit Reasons



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".

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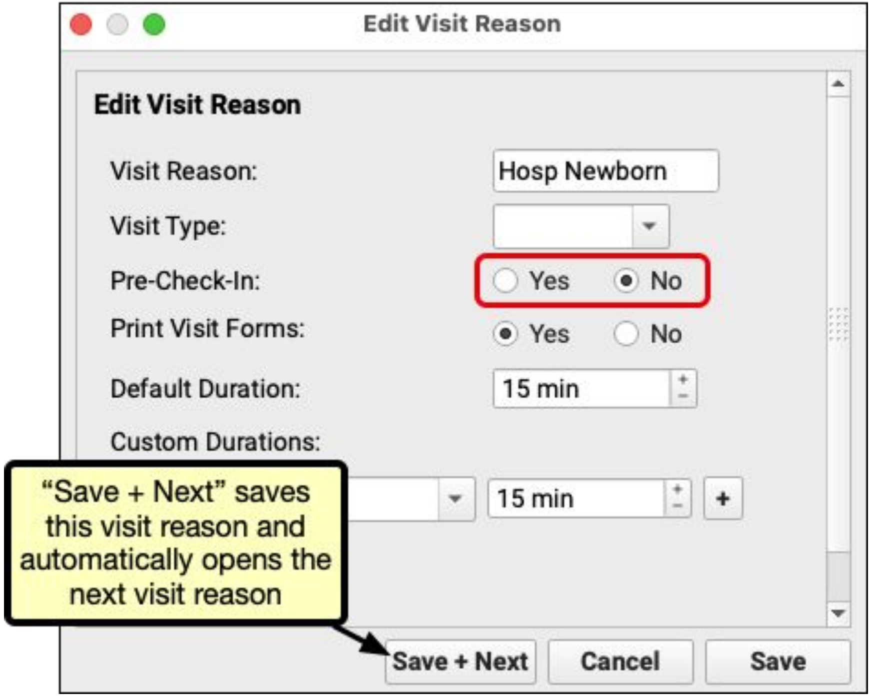
Pre-Check-in Configuration: Visit Reasons



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.

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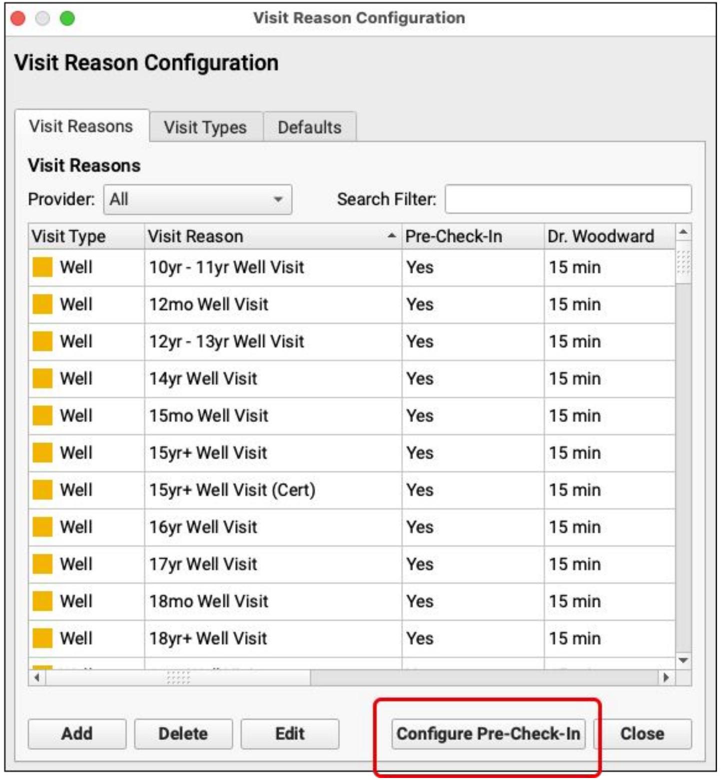
Pre-Check-in Configuration: Visit Reasons



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

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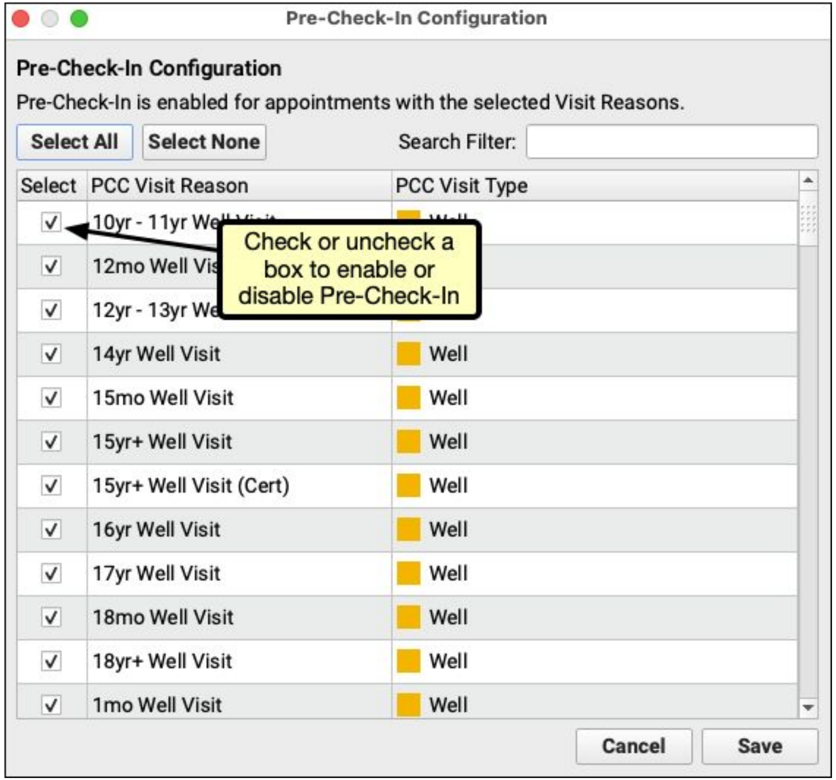
Pre-Check-in Configuration: Visit Reasons



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.

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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.”

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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

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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.

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Panelist Questions

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Panelist Introduction

- Shana Loterbauer - Pearland Pediatrics (TX)

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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?

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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

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Feedback

Ensure Success Education Sessions - Live Polling

Join at
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#3705 335

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Resources

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

- Portal Pre-Check-In

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Thank you for attending!

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