PCC Pediatric EHR Solutions

Front Desk Workflows

Pre-visit Front Desk Workflow

1. Send Appointment Reminders
    a. Send Reminders Manually
        - Use the appointment book to find the visit
        - Open the patient's chart to get the contact phone number
        - Update the appointment note with the visit confirmation
        - Reschedule as needed

    b. Use Notify to Send Reminders
        - Check **notifylog**
            - Open the **Practice Management** window
            - Arrow down to **Account/Patient Communications** and hit enter
            - Select **Review Notification Center Reports**
            - Review this link on how to check cancellations and patients not contacted: https://learn.pcc.com/help/review-the-notification-log-and-canceled-appointments/
            - Delete canceled appointments (how you do this will vary based on your configuration)
            - Call patients to verify cancellations and to reschedule
2. Review Eligibility (Instructions at: https://learn.pcc.com/help/patient-insurance-eligibility/)
3. Print Visit Forms
    a. These should include demographics and/or questionnaires
4. **Optional:** Print your daily huddle sheet

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Patient Check In Workflow

1. For more details on the check in process, visit https://learn.pcc.com/help/check-in-a-patient/
2. If your practice is migrating from another system, give patients a demographic form to ensure accurate demographic information
3. Review and print necessary forms
4. Review portal information, and add new portal user(s) if necessary. Instructions are available at: https://learn.pcc.com/help/my-kids-chart-administration/
5. Review billing notes
6. Review and update patient demographics
7. Review and update policies
    a. Scan the insurance card if necessary
        - Attach the scanned card to the patient
    b. If the plan does not exist in the drop down
        - Create a new document task on the insurance card with instructions to add the plan to the system
        - Assign the task to the billing user
8. Review eligibility
9. Review account balances

10. Collect copay / personal payments
    a. Swipe credit card before posting payment
    b. Use check number for last 4 digits of credit card
11. Enter Patient's Confidential Communication Preference for appointment reminder program
12. Save + Check-in

Front Desk Checkout

1. Use the forms component to print any necessary forms
2. Schedule the patient's next appointment
3. Post self pay charges (see the Charge Posting Workflow)
4. Collect any new copays or other balances
5. Print the Patient Visit Summary as needed

End of Day Front Desk Workflow

1. Manage any missed appointments
2. Verify that all visit and message tasks are completed
3. Reconcile payments
4. Use Correct Mistakes in Practice Management to delete any mistakes
5. Use "Post Regular Payments" in Practice Management to post payments after the date of service