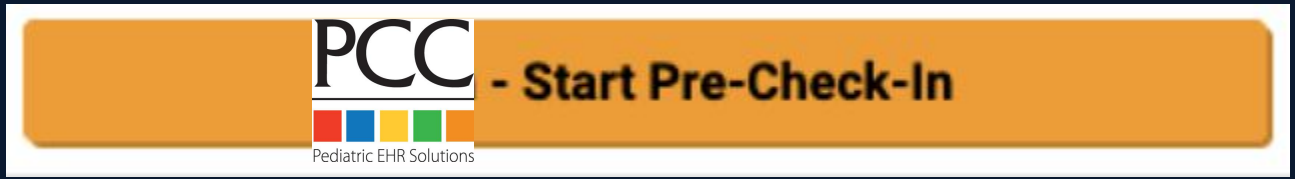
Get Started

with

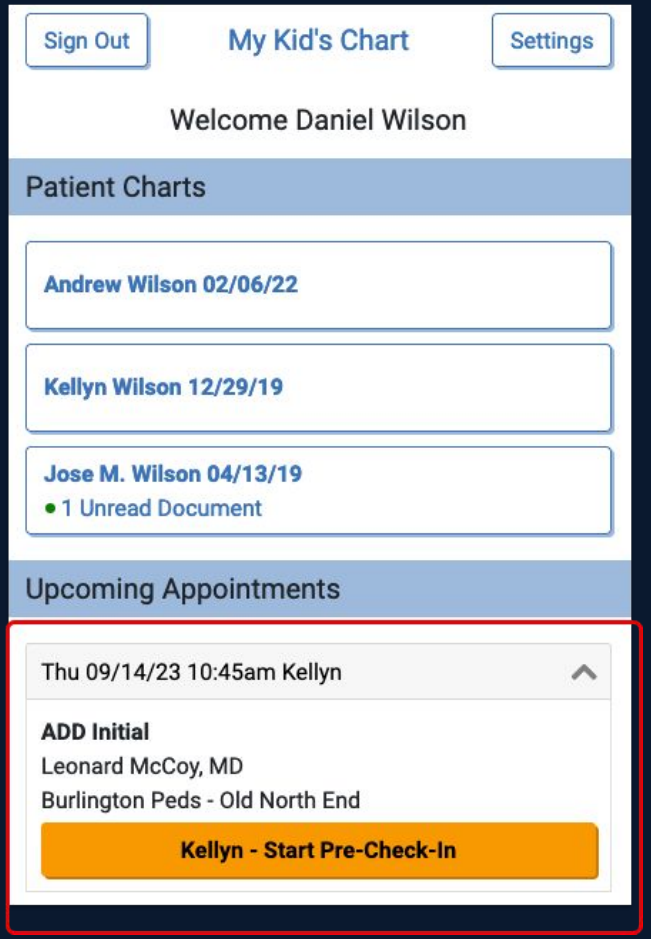
Patient Pre-Check-In

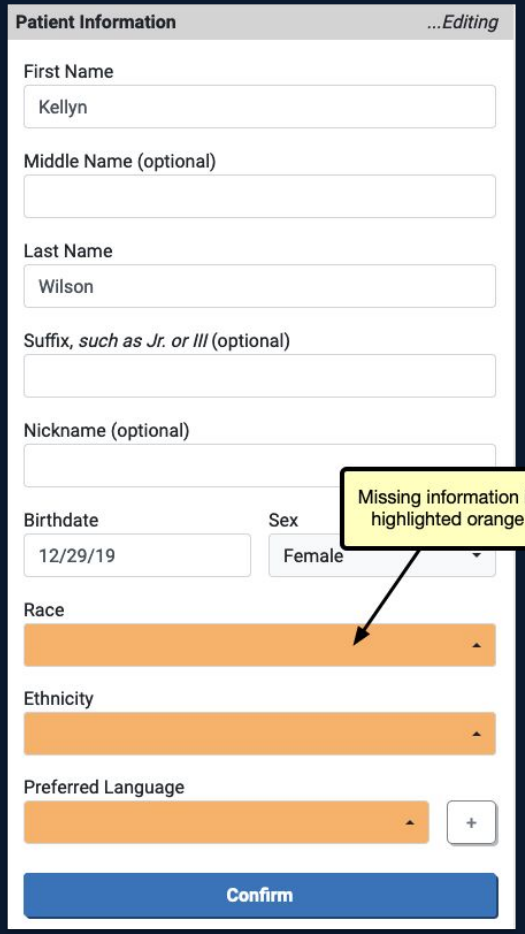


Benefits of Pre-Check-In

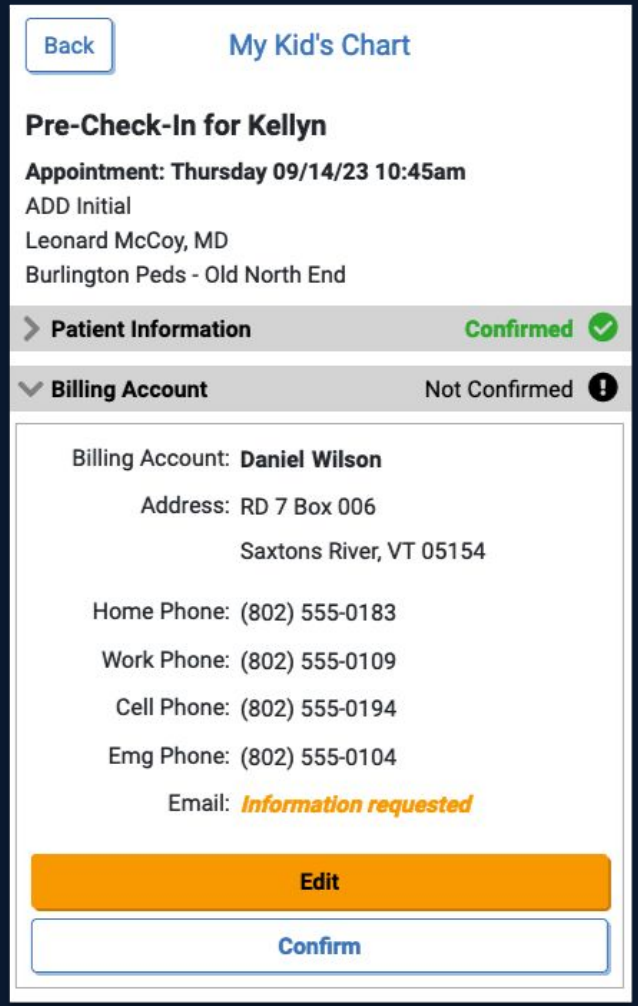
- Reduction of waiting room time
- Completion of pre-visit policies
- Increased accuracy of demographic data
- Reinforcement of the Patient Portal
- Reduction in scanning and indexing documents
- Increased time for other projects at the front desk

Patient Information

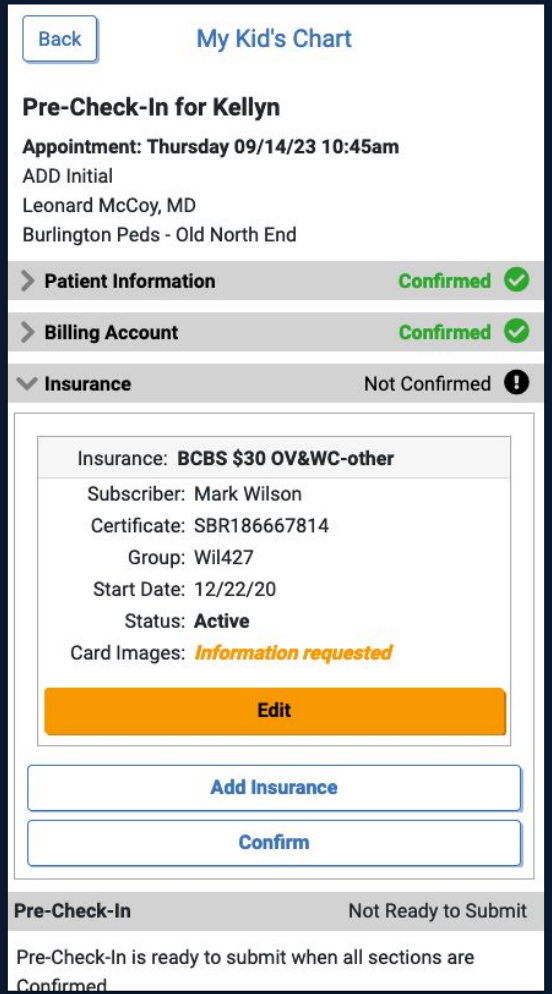




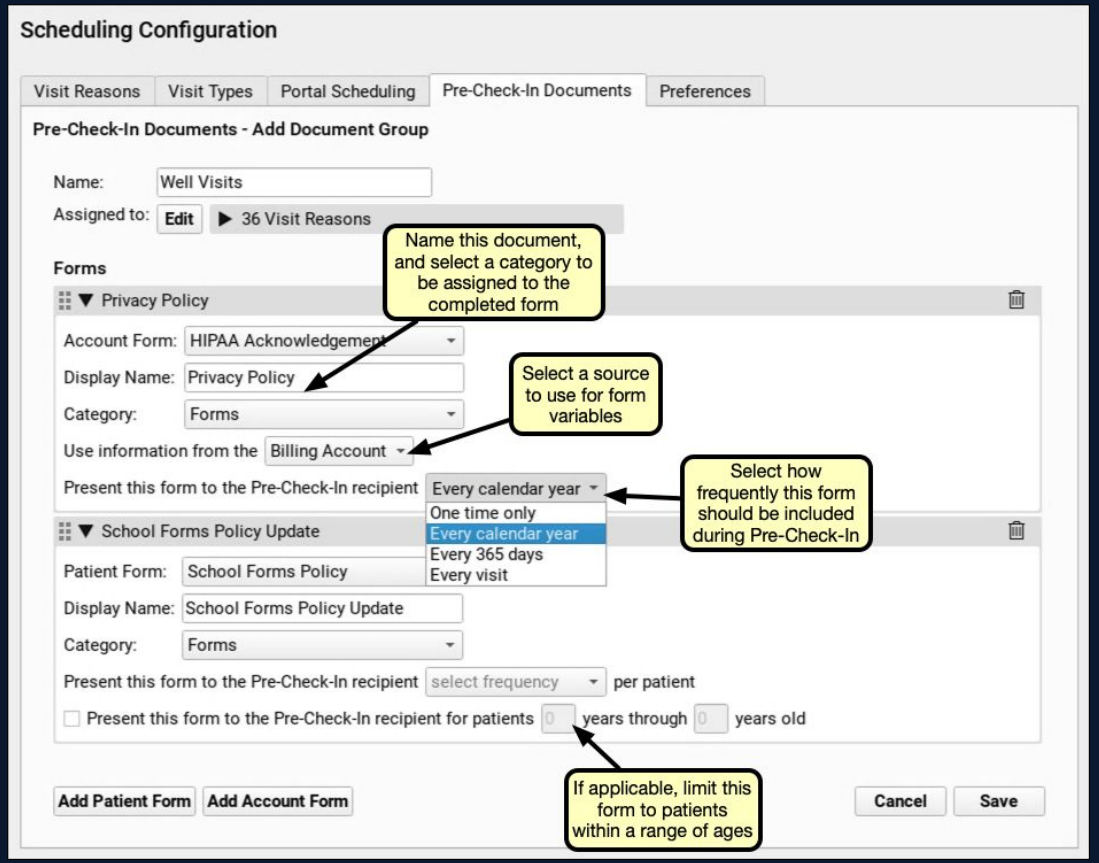
Billing Account



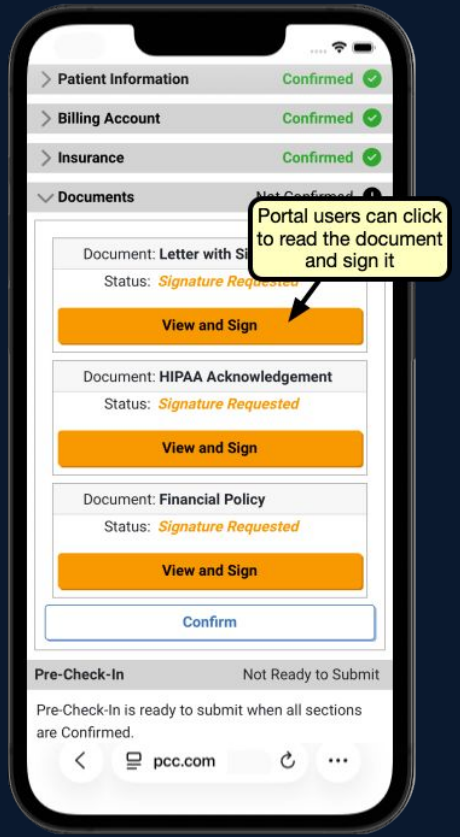
Insurance

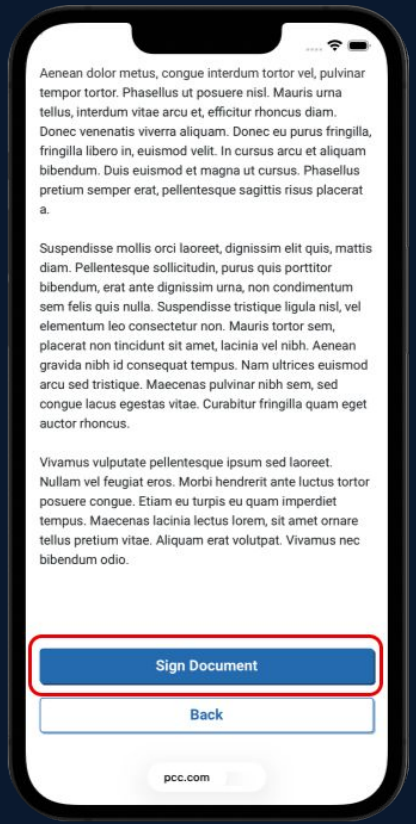

Back
My Kid's Chart
Pre-Check-In for Kellyn
Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End
Patient Information
Confirmed
Billing Account
Confirmed
Insurance
Not Confirmed
Insurance: BCBS $30 OV&WC-other
Subscriber: Mark Wilson
Certificate: SBR186667814
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

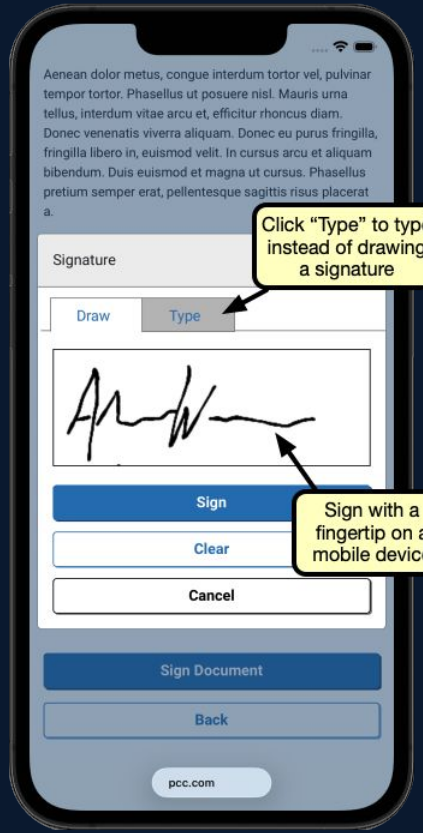
New! Fall 2026 Release - Signable Documents



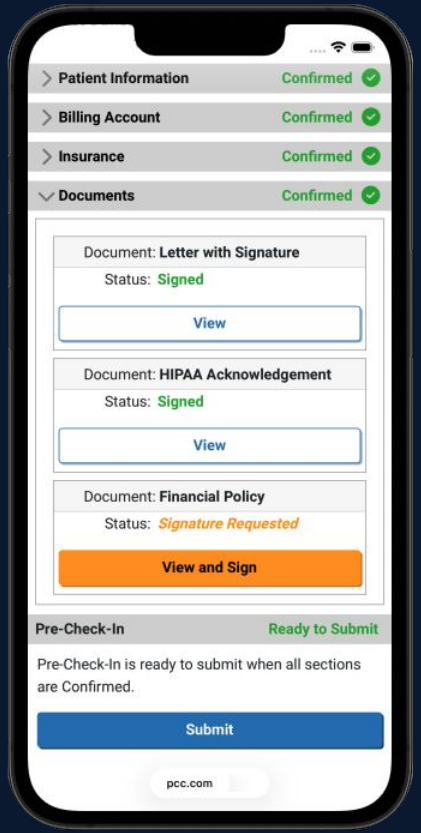
New! Fall 2026 Release - Signable Documents

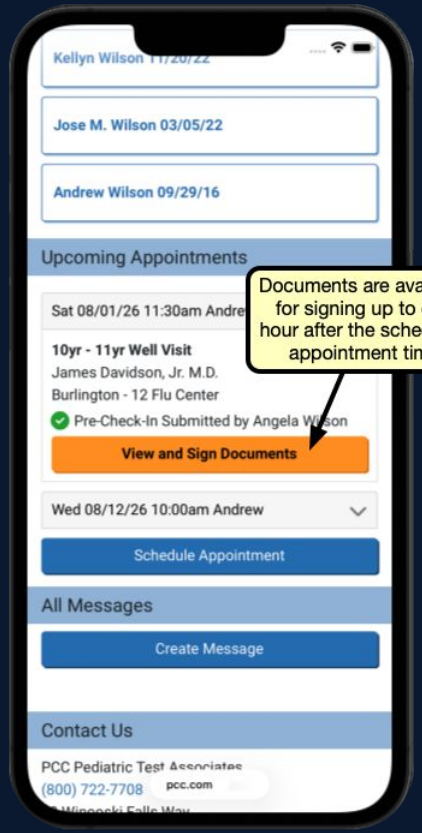






New! Fall 2026 Release - Signable Documents





New - Fall 2026 Release - Signable Documents



Implementing Pre-Check-In

Prerequisites

- Appointment Book
- Patient Check-In
- Patient Portal

Review Workflows

- Phone numbers
- Notifications
- Eligibility
- Documents

Configure Pre-Check-In

- Visit Reasons
- Ins Card Document Category
- Documents

Account Management - Best Practices

1. Create a single Home and Billing Account who will receive notifications for appointments.

2. Make the second parent a Personal Contact. Consider whether to include their phone number as part of the Home/Billing Account.

They can also be listed as Additional Recipient under Pre-Check-In Recipient.

PCC Learn Resources

Patient Pre-Check-In Archives

Fall 2026 Release: Signable Documents

Configure Pre-Check-In

Frequently Asked Questions

Portal & Billing Integration

- How do we ensure Billing Accounts are linked to portal users?
- How can we increase the percentage of portal-linked Billing Accounts?

Data Handling & Validation

- Why doesn't portal data auto-update the EHR?
- Why aren't specific data fields required?
- What data inputs are specifically disallowed?
- How does the system handle text entered into phone or email fields?
- Why do checkboxes sometimes appear alongside blank data?

Frequently Asked Questions

User Interface (UI) & Display Logic

- Why use the same "blank clipboard" icon for both missing portal users and unresponsive users?
- Why does the Pre-Check-In button appear 7 days out, but notifications send at 48 hours?
- What logic determines which fields highlight orange for "information requested"?

Insurance Management

- What are the rules for "on file" versus "expired" insurance cards?
- Why can't insurance policies be edited while viewing the card?
- How are "No Insurance" or other non-standard policy entries handled?

Appointment Workflows

- How are administrative non-visits and confidential visits processed?
- Why can't an accidentally "arrived" appointment be reverted to "Scheduled"?