Patient Pre-Check-In

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This session will review:

- Pre-Check-In features, benefits, and limitations
- Account management best practices and challenges
- How to implement Pre-Check-In at your practice
- Frequently asked questions
- Client feedback

Pre-Check-In Features

Let’s take a tour of the Portal and EHR to see what your patients and your practice will experience with Pre-Check-In.

Benefits of Pre-Check-In

- Increased accuracy of demographic data entered into the EHR.
- Reduction of time spent in the waiting room.
- Reinforcement of the Patient Portal as a tool for communication with your practice.
- Less time spent scanning insurance cards and attaching those to patients.
- More time for other tasks/projects instead of demographic and insurance transcription.

Limitations of Pre-Check-In

We are currently in version 1 of Pre-Check-In.

Some important items to note about the current features:

- Families with multiple patients (siblings) coming in same day will Pre-Check-In for each patient
- Pre-Check-In fields and “information requested” can’t be customized
- Phone numbers might pose some challenges (labels, notes)
- No special functionality for offices who assign a policy of “Uninsured”
- Notification time frame is not customizable (48 hours)
- Families with patients marked Privacy Enabled can’t Pre-Check-In

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.

Account Management - Challenges

Ampersand/And/Slash Accounts

The linked Patient Portal account name will be overwritten to match the name of the Billing Account. This may cause challenges when sending portal messages.

Separate Home and Billing Accounts

You should exercise caution in changing the Billing Account, given that the account's Billing History can't be migrated easily.

Moving Billing History requires deleting the charges under the old account and posting them to the new account, or merging the accounts

Implementing Pre-Check-In

Prerequisites ✓

- Appointment Book
- Patient Check-In
- Patient Portal

Review Workflows ✓

- Phone numbers
- Notifications
- Eligibility

Configure Pre-Check-In ✓

- Visit Reasons
- Insurance Card Document Category

Frequently Asked Questions

- How do we make sure our Billing Accounts have portal users?
- Why does Portal user data not automatically update the EHR?
- Why don't we "require" certain data?
- Why do we display the same icon (blank clipboard - Pre-Check-In is not done) when there is no portal user just like we do when the portal user hasn't responded?
- Why can't I edit policy while viewing the insurance card?
- Why does the orange Pre-Check-In button display 7 days before the appointment but the notification goes out 2 days (48 hours) before the appointment?
- How do I improve the percentage of portal accounts linked to Billing Accounts?

Frequently Asked Questions

- What is the logic behind why some fields are orange ("information requested")?
- What happens if the practice has text in a phone number field? (this is true of email too)
- Is there any input that we specifically disallow?
- What are the rules for insurance card on file and insurance card expired?
- What about policies called "No Insurance" or other non-policy entries?
- How do you handle administrative non-visits and confidential visits?
- Why do I have a checkbox with blank data?
- How come I can't revert an appointment to "Scheduled" that I accidentally arrived?

Additional Resources

[Patient Portal - Pre-Check-In - PCC Learn]

Please fill out the course survey in the app

What Questions Do You Have?

Image References

Adorable little builders - source

Little builder head - source

Checkmark - source