

Patient Check-In

PCC



Pediatric EHR Solutions

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1. Introduction

The **checkin** program checks in patients. During checkin, you can update account and patient information, update insurance information, review outstanding balances, check eligibility, and post a copay payment.

Because **checkin** has links to many essential Partner programs, it can be a great starting point for any staff member who deals with patients and accounts.

The **checkin** program is the perfect tool for the front office. In **checkin**, you can quickly confirm and verify essential information, make needed changes, and post a copay. The **checkin** program also tells your EHR and other Partner programs that the patient has arrived.

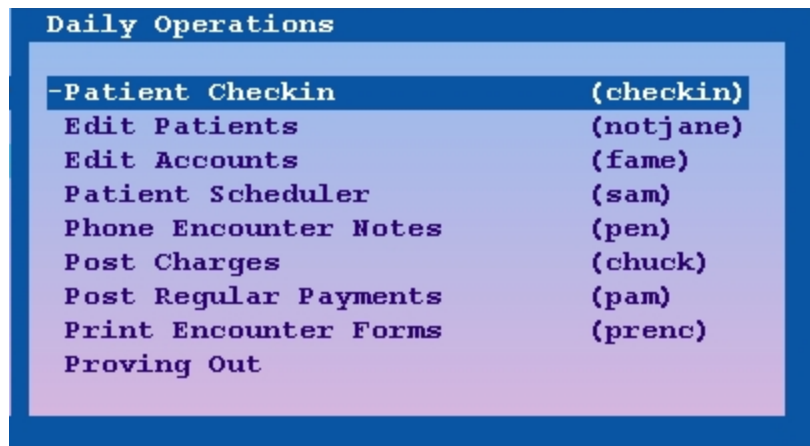
Visit learn.pcc.com to watch a training video on **checkin**, **checkout**, and many other basic Partner programs. Contact PCC Software Support at 1-800-722-1082 with any questions.

2. Quickstart: Check In a Patient

What is your office's procedure for checking in patients? Do you review their address, check their insurance information, and ask them for their copay? Whatever your procedure, **checkin** has tools to help you. The procedure below covers all the screens in **checkin**: Demographics, Additional Demographics, Eligibility, Insurance, Balance and Copay, and the optional Personal Payment screen.

Step 1: Run checkin

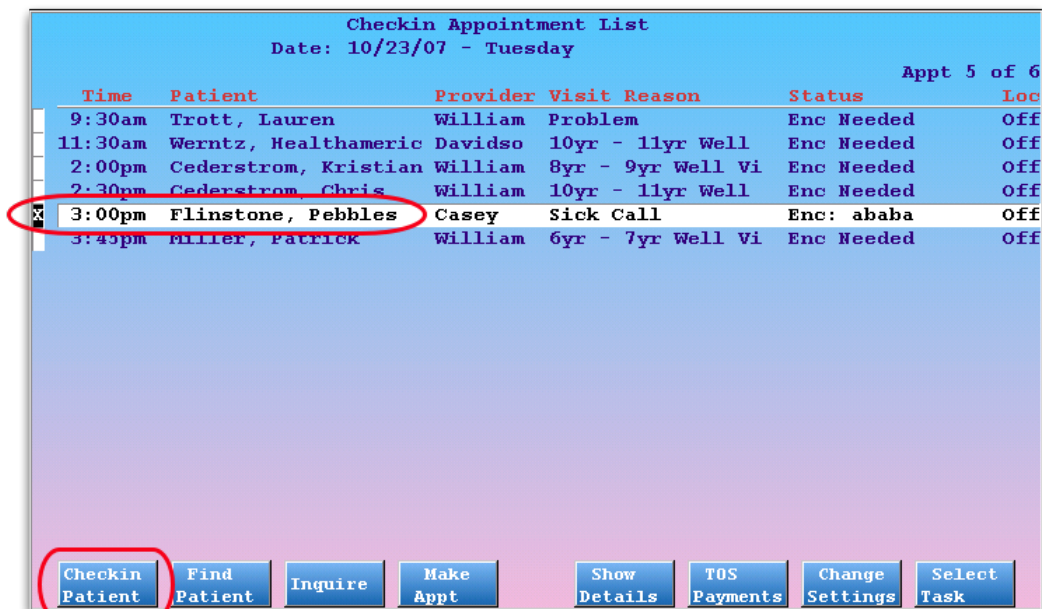
You can run **checkin** from your Partner windows.



You can also type **checkin** at a command prompt.

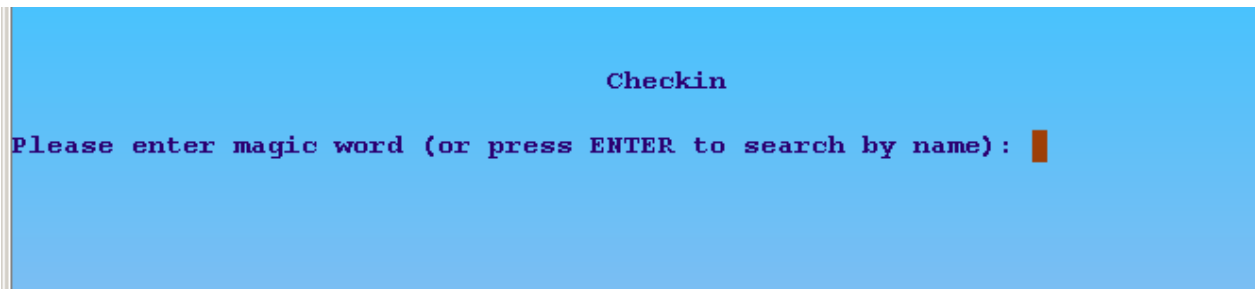
Step 2: Select or Find a Patient

When you run **checkin**, you must select the patient you wish to check in. Use the arrow keys to pick from a list of patients who are scheduled to visit that day:

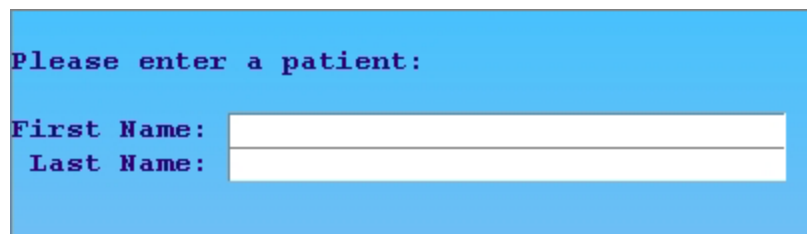


Press [F1 -- *Checkin Patient*] to check in the selected patient. To learn more about the patient selection screen in Partner, read *Appointment Lists*.

If the patient is not scheduled to visit, you can press [F2 -- *Find Patient*] to use a "magic word" or search by other means:

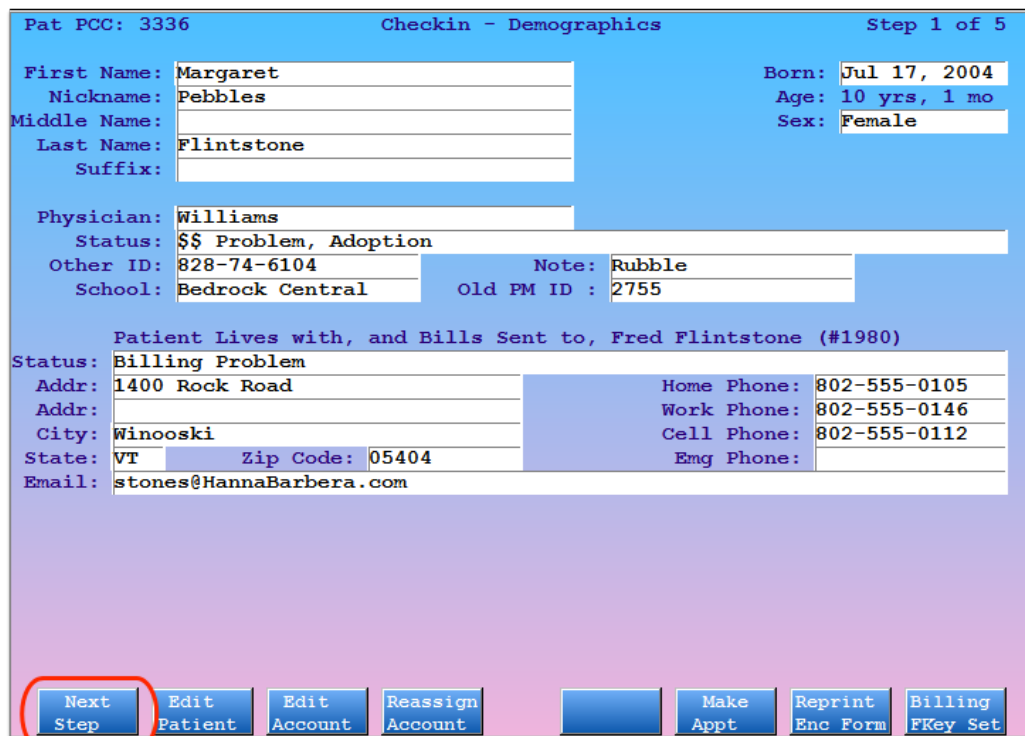


Or, after pressing **Enter**:



Step 3: Confirm and Update Demographic Information

Next, confirm the patient's basic demographic information. Are the name and address entered correctly? Are bills being sent to the proper account? On the Demographics screen, you can quickly review and update this essential information.



Pat PCC: 3336		Checkin - Demographics		Step 1 of 5		
First Name:	Margaret	Born:	Jul 17, 2004			
Nickname:	Pebbles	Age:	10 yrs, 1 mo			
Middle Name:		Sex:	Female			
Last Name:	Flintstone					
Suffix:						
Physician:	Williams					
Status:	\$\$ Problem, Adoption					
Other ID:	828-74-6104	Note:	Rubble			
School:	Bedrock Central	Old PM ID :	2755			
Patient Lives with, and Bills Sent to, Fred Flintstone (#1980)						
Status:	Billing Problem					
Addr:	1400 Rock Road	Home Phone:	802-555-0105			
Addr:		Work Phone:	802-555-0146			
City:	Winooski	Cell Phone:	802-555-0112			
State:	VT	Zip Code:	05404	Emg Phone:		
Email:	stones@HannaBarbera.com					
Next Step	Edit Patient	Edit Account	Reassign Account	Make Appt	Reprint Enc Form	Billing FKey Set

The function keys at the bottom of the screen allow you to jump to other Partner programs. Read the article on Demographics for more information about tools on this screen.

Once you have finished checking and updating the patient's basic information, press [F1 -- Next Step] to continue.

Step 4: Confirm and Update Additional Demographic Information

Next, confirm the patient's race and ethnicity, preferred languages, and confidential communication preferences.

Pat PCC (#3336) Checkin - Additional Demographics Step 2 of 5

First Name:	Pebbles	Born:	Jan 12, 2002
Last Name:	Flintstone	Age:	10 years
Physician:	Mark Williams, M.D.	Sex:	Female
Status:	\$\$ Problem, Adoption		

Ethnicity: Not Hispanic or Latino
Race: White

Preferred Language: English
Other Language:
Other Language:

Patient Confidential Communication Preference:

Contact Name: _____
Method:
Mailing Address
Cell Phone
Work Phone
Home Phone
Text
E-mail
 No Preference (Custodial Name and Mailing Addr. will be used.)

Next Step Edit Policies Imms Record Patient History Patient Forms

The function keys at the bottom of the screen allow you to jump to other Partner programs. Read the section on Additional Demographics for more information about tools on this screen.

Once you have finished checking and updating the patient's information, press [F1 -- Next Step] to continue.

Step 5: Confirm Eligibility

Review the insurance carrier's Eligibility Response, along with other eligibility details. The Patient Eligibility screen displays the patient's primary insurance policy along with the most recent eligibility result for the appointment.

Pat PCC: 2974 Patient Eligibility Step 2 of 4

Patient: Pebbles Flinstone (12/02/2001)
 PCP: None Subscriber: Wilma Flinstone
 Appointment: 04/20/09 10:45am Sick Call

PRI: SuperHealth \$10 CERT: 999999999 GRP: ABCD

Notes: Status: Validated Date Verified: 04/20/09
 Notes regarding eligibility status.

Eligibility Response Date: 04/21/2009 (ACTIVE)

Service: 04/21/2009
 Enrollment: 12/31/2007
 PROFESSIONAL (PHYSICIAN) VISIT - OFFICE
 Active Coverage
 MSG: REFERRAL IS REQUIRED
 Auth: Yes
 \$25 Individual Copayment Visit
 MSG: MEDICAL CARE - PRIMARY CARE (OB/GYN), NURSE PRACTITIONER
 \$35 Individual Copayment Visit
 MSG: MEDICAL CARE - OTHER COVERED PROVIDER

Next Step Scroll Backward Scroll Forward Edit Policies Edit Patient Request Elig See Full Report Change Status

Note: Press [F6 -- Request Elig] to request updated information from the carrier. Eligibility confirmation usually takes several seconds.

Once you have reviewed patient eligibility, press [F1 -- Next Step] to continue.

Step 6: Confirm Insurance Information

On the Insurance screen, you can confirm or update the patient's policy information. The Insurance screen shows you information about every insurance policy associated with the patient.

Checkin - Insurance Step 3 of 4
 Pebbles Flinstone

Copay	Insurance Company	Certificate #	Group #
20.00	BCBS \$20 Empire	5555555503	MOY205
15.00	Aetna MC \$15 Box 1125	4444444405	TAM13
10.00	(Expired) Cigna PPO \$10	3333333302	BRY623

Press the Right Arrow Key for More Information

BCBS \$20 Empire / BCBS Empire / BCBS
 Dept 778983 Payor ID: SB865
 Harrisburg, PA 17177-8983 Phone:

SUBSCRIBER
 First: Fred Birth: 02/12/1976 Start: 04/11/2005
 Last: Flintstone Sex: Male End:
 Address: 479 Granite Avenue ReIn: Child
 Bedrock, VT 05056 Employr:

Next Step Scroll Backward Scroll Forward Edit Policy Insert Policy Move Policy Delete Policy Expire Policy

You can arrow up and down to review each of the insurance policies, and you can use the function keys at the bottom to edit, insert, move, delete, or expire any policy. If you change the patient's primary policy, you may wish to **Page Up** to the Patient Eligibility step and request updated eligibility status from the carrier.

Once you have checked the patient's insurance card and confirmed it matches the screen, press [F1 -- Next Step] to continue.

Step 7: Check Copay, Copay Notes, and Outstanding Balances

On the Balance and Copay screen, you can review the appointment's expected copay, an aging summary for outstanding balances, and any available insurance eligibility information for the patient.

Checkin - Copay and Balance Step 4 of 4

***** COPAY: \$20.00 *****

Copay Note: Copay requires \$20 for first sick, but no copay after that
Policy: Cigna PPO \$20

***** PERSONAL BALANCE: \$37.00 *****

Account: Fred Flintstone (#1980)

AGING	0-29	30-59	60-89	90-119	120+	CREDIT	BALANCE
PER:	0.00	0.00	0.00	0.00	37.00	0.00	37.00
INS:	0.00	0.00	0.00	0.00	128.00	0.00	128.00
Med:	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Buttons: Finish Checkin, Show Detail, TOS Payments, Print

Step 8: Optional: Press [F6 -- TOS Payments] and Post Copay

If you collect copay payments during checkin, press F6 to visit the Personal Payment screen.



Checkin - Personal Payment

Guarantor Fred Flinstone
10/23/07 Appointments

Patient	Copay	Insurance	Visit Reason
Pebbles Flinstone	\$ 20.00	BCBS \$20 Empire	Sick Call
Total Copay: \$ 20.00			
Old Personal Bal: \$ 30.00			
Total Possible Bal: \$ 50.00			

Date	Payment/Adjustment Type	Amount	Check #	Provider
10/23/07	Check	\$ 50.00	434	Casey

Buttons: Save Payment, New TOS Pmt, Balance Details

Enter the payment type, payment amount, and optionally a check number or provider.



Press [F1 -- *Save Payment*] to save your payment and continue, or press F12 to cancel and not enter a payment.

Step 9: Press [F1 -- *Finish Checkin*]

If you need to review any previous **checkin** steps, or you want to go back to a previous screen, just press **Page Up**. You can also press F12 at any time during checkin to quit.



Press [F1 -- *Finish Checkin*] from the Balance and Copay screen to finish checking in the patient. **checkin** will update the appointment's status to "Checked In," and you can select the next patient in line.

Now that you know how to check in a patient in Partner, read the sections below to learn about other tools and functions you can perform during checkin.

3. Checkin Screens

3.1. Appointment Lists in Checkin, Checkout and Nimms

Partner's **checkin**, **checkout**, and **nimms** programs have appointment lists that make selecting a patient fast and easy. Instead of typing in a patient's name, you can pick from a list of patient appointments. When you need to, you can skip the list and enter a name, but the appointment lists save time and reduce mistakes.

3.1.1 Overview

When you run **checkin**, **checkout**, or **nimms**, you see a customizable list of today's patients:

Checkin Appointment List
Date: 03/29/05 - Tuesday

Time	Patient	Provider	Visit Reason	Status	Appt 1 of 27	Loe
8:00am	Luster, Matthew	Crusher	Physical	Enc Word: canto	Off	
8:15am	King, Jamilettes	Crusher	Recheck Ear	Enc Word: caper	Off	
8:30am	Howell, Joannamari	Crusher	Walk-In	Enc Word: caret	Off	
9:00am	Sousa, Brian	Crusher	Recheck Ear	Enc Word: carey	Off	
9:00am	Salkins, Joseph	Crusher	Sick Call	Enc Word: cargo	Off	
9:30am	Knittle, Johnny	Crusher	Physical	Enc Word: carib	Off	
10:15am	Anderson, Henry	Crusher	Sick Call	Enc Word: carla	Off	
10:30am	Milo, Mackenzie	Crusher	Physical	Enc Word: carlo	Off	
11:15am	Mcosker, Samantha	Crusher	Sick Call	Enc Word: carne	Off	
11:45am	Harrigan, John	Crusher	Physical	Enc Word: carob	Off	
12:15pm	Blakeman, Anna	Crusher	Sick Call	Enc Word: array	Off	
1:15pm	Walsh, Michael	Crusher	Sick Call	Enc Word: carol	Off	
1:15pm	Krukonis, Navit	Crusher	Physical	Enc Word: carry	Off	
2:15pm	Blakeman, Anna	Crusher	Sick Call	Enc Word: arlen	Off	
2:30pm	Williams, Jason	Crusher	Sick Call	Enc Word: carte	Off	
2:45pm	Webb, Denise	Crusher	Physical	Enc Word: carve	Off	
3:00pm	Friedrich, Leanne	Crusher	Physical	Enc Word: casey	Off	
3:00pm	Hamel, Leo	Crusher	Physical	Enc Word: caste	Off	
3:15pm	Twombley, Katy	Crusher	Sick Call	Enc Word: catch	Off	
3:30pm	Twombley, August	Crusher	Sick Call	Enc Word: cater	Off	
3:30pm	Manning, Anthony	Crusher	Physical	Enc Word: cathy	Off	
3:45pm	Robinson, Paul	Crusher	Physical	Enc Word: caulk	Off	
4:00pm	Kallas, Amelia	Crusher	Physical	Enc Word: cavil	Off	

Buttons at the bottom: Checkin Patient, Find Patient, Inquire, Make Appt, Show Details, Change Settings, Select Task.

Basic visit information is included on the list, and you can quickly select a patient and press **F1** to continue. Function keys at the bottom of the screen help you find any patient or perform other important tasks.

By default, patients disappear from the Checkin Appointment List after they are checked in and disappear from the Checkout Appointment List (or Nimms list) when checked out. You can customize that behavior.

3.1.2 Reviewing the Appointment List

When you run a program that uses an appointment list, such as **checkin**, Partner finds all the appointments that match certain criteria and creates a custom "Appointment List" for the program you are running.

Page Up		F12		Page Down	
Checkin Appointment List					
Date: 03/29/05 - Tuesday					
					Appt 1 of 27
Time	Patient	Provider	Visit Reason	Status	Loc
8:00am	Luster, Matthew	Crusher	Physical	Enc Word: canto	Off
8:15am	King, Jamilettes	Crusher	Recheck Ear	Enc Word: caper	Off
8:30am	Howell, Joannamari	Crusher	Walk-In	Enc Word: caret	Off
9:00am	Sousa, Brian	Crusher	Recheck Ear	Enc Word: carey	Off
9:00am	Salkins, Joseph	Crusher	Sick Call	Enc Word: cargo	Off
9:30am	Knittle, Johnny	Crusher	Physical	Enc Word: carib	Off
10:15am	Anderson, Henry	Crusher	Sick Call	Enc Word: carla	Off
10:30am	Milo, Mackenzie	Crusher	Physical	Enc Word: carlo	Off
11:15am	Mcosker, Samantha	Crusher	Sick Call	Enc Word: carne	Off
11:45am	Harrigan, John	Crusher	Physical	Enc Word: carob	Off
12:15pm	Blakeman, Anna	Crusher	Sick Call	Enc Word: array	Off
1:15pm	Walsh, Michael	Crusher	Sick Call	Enc Word: carol	Off
1:15pm	Krukonis, Navit	Crusher	Physical	Enc Word: carry	Off
2:15pm	Blakeman, Anna	Crusher	Sick Call	Enc Word: arlen	Off
2:30pm	Williams, Jason	Crusher	Sick Call	Enc Word: carte	Off
2:45pm	Webb, Denise	Crusher	Physical	Enc Word: carve	Off
3:00pm	Friedrich, Leanne	Crusher	Physical	Enc Word: casey	Off
3:00pm	Hamel, Leo	Crusher	Physical	Enc Word: caste	Off
3:15pm	Twombly, Katy	Crusher	Sick Call	Enc Word: catch	Off
3:30pm	Twombly, August	Crusher	Sick Call	Enc Word: cater	Off
3:30pm	Manning, Anthony	Crusher	Physical	Enc Word: cathy	Off
3:45pm	Robinson, Paul	Crusher	Physical	Enc Word: caulk	Off
4:00pm	Kallas, Amelia	Crusher	Physical	Enc Word: cavil	Off

The list automatically scrolls to the current time. If it is two o'clock in the afternoon, the list will scroll to show patients who are scheduled for two o'clock.

Use the arrow keys or press **Page Up** and **Page Down** to scroll up and down and view the entire day. Press the right or left arrow key to move through the days. In this way, you can review appointment lists for any date, just as if you were flipping through a paper scheduling book.

Once you have chosen an appointment with which to work, press **F1** to continue working with the patient in the **checkin**, **checkout**, or **nimms** programs.

Created in PCC EHR? If an appointment was created in an EHR and not Partner, you will see "(EHR" appended to the status.

Checkin Appointment List					
Date: 10/11/12 - Thursday					
					Appt 8 of 24
Time	Patient	Provider	Visit Reason	Status	Loc
11:00am	Case, Riley D.	Davidso	Sick Call	Enc: Brian	Off
11:10am	Flintstone, Dino	Crusher	Sick Call	Enc: allis (EHR)	Off
11:15am	Hestattler, Amanda	William	Recheck	Enc: hanna	Off
11:15am	Yentsch, Eric	Davidso	Sick Call	Enc: breve	Off
11:15am	Drescher, Reid	Casey	Recheck	Enc: bravo	Off
11:30am	Hamann, Adam	Casey	5yr Well Visit	Enc: boyar	Off
12:00pm	Wagner, Makena	Davidso	Sick Call	Enc: brice	Off
12:15pm	Daniels, Jordan J	Casey	Recheck	Enc: boyle	Off
1:45pm	Spohn, Eryn	William	6yr - 7yr Well Vi	Enc: bosom	Off
2:15pm	Weiss, Jennifer S	Casey	2wk Well Visit	Enc: bract	Off
2:45pm	Firestone, Kelsey	William	Medication Follow	Enc: botch	Off

"EHR" appears with the Status

3.1.3 Can't Find an Appointment?

If you can't find an appointment, you can run the **inquire** program and check the patient's schedule. If you can't find the appointment in **checkout**, you might switch over and review the **checkin** program. By default,

appointments do not appear in **checkout** until they are checked in.

If the patient does not have an appointment, you can press F4 to schedule one. The patient will be added to your list, and (optionally) Partner will print an encounter form for the appointment.

If you wish to proceed without an appointment, press [F2 -- *Find Patient*] to search by name or other criteria. Read *Finding Patients and Accounts* to learn more about finding patients.

3.1.4 Extra Functions and Tools

While you are choosing a patient to work with, you can perform many other useful functions.

[F3 -- *Inquire*]

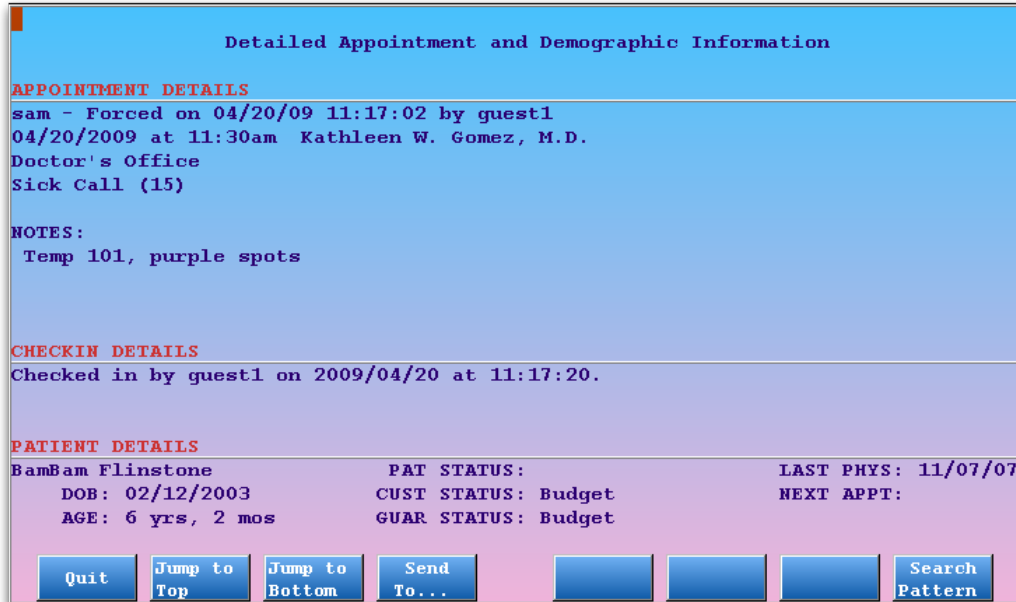
Press **F3** to run **inquire** for the currently selected patient. You can review the patient's visit history, change notes for the visit, and cancel, delete, or mark any appointment as missed.

[F4 -- *Make Appt*]

Press **F4** to run **sam** and schedule any patient. You should do this for all "Walk-In" visits so they will have an encounter form and an appointment in your system. If your office does not use **sam**, **F4** can be configured to run **encount**.

[F5 -- *Show Details*]

Select an appointment and press **F5** to view the Appointment and Demographic Information screen, which contains full details about the patient and the currently scheduled appointment:



[F7 -- *Change Settings*]

Press **F7** to open the Settings window for the Appointment List. For a complete guide to configuring what appears on your appointment lists, read the Configure Appointment Lists article.

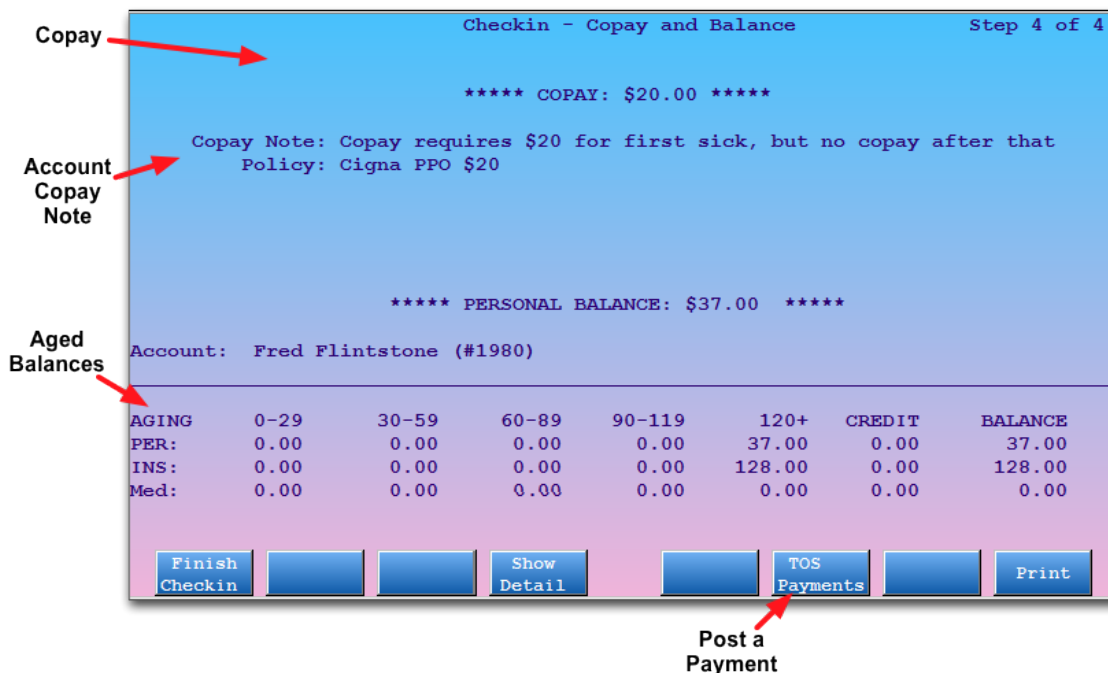
[F8 -- *Select Task*]

Press **F8** to switch between patient check-in (**checkin**) and check-out (**checkout**). You can view a custom appointment list in both programs.

3.2. Demographics

The first screen in **checkin** shows demographic information and allows you to jump into other basic Partner programs. This screen is a great benefit to anyone using Partner, especially if they are at the front desk, answer phones, or need to use several different Partner programs with a patient at once.

3.2.1 Reading the Demographics Screen



The Demographics screen shows the patient's name, age, primary care provider, sex, and status line as well as four customizable patient fields. The screen also includes the status line, address, and phone information for any family account(s) associated with the patient.

Status Lines: Status lines contain status flags that you can assign to patients or accounts. In the example above, Pebbles Flintstone has the status of "Medicaid" and "Needs Extra Time," and his guarantor (Fred Flintstone) has the status of "Budget." To see the list of statuses on your system, enter an asterisk (*) in any Status field. PCC can teach you how to create new status flags that will help your office identify certain patients or accounts.

Use the **Enter** and **Backspace** keys to move among the fields and make changes. Press **End** to erase the text after the cursor. In some fields, you can use an asterisk (*) to get a list of possible choices.

For example, if you learned that Pebbles Flintstone is really the patient of Dr. Crusher, you could press **Enter** until your cursor was in the Physician field, press **End** to erase Dr. McCoy's name, and then enter a "C" for Crusher.

Get an Updated Encounter Form: After changing important information about a patient, press [**F7** -- *Reprint Enc Form*] so the encounter form for the visit has the most up-to-date information. You may want to confirm insurance information on step two of **checkin** first.

One or Two Families? If your patient has only one family serving as both the guarantor and custodian, you will see only one family listed on this page. If the patient has one account as a custodian but a different account as a guarantor, you will see both accounts at the bottom of the screen. A two-account patient would look like this:

Pat PCC (#3336) Checkin - Demographics Step 1 of 4

First Name: Pebbles Born: Oct 17, 2001
 Last Name: Flintstone Age: 10 yrs, 1 mo
 Physician: Williams Sex: Female
 Status: \$\$ Problem, Adoption
 SSN: 828-74-6104 Alt Name: Rubble
 School: Chart #:

Patient Lives with Wilma Flintstone (#1981)

Status: CONFIDENTIAL
 Addr: 15 Quarry Lane Home Phone: 802-568-2814
 Addr: Work Phone: 802-978-3681
 City: Winooski Cell Phone: 802-835-8364
 State: VT Zip Code: 05404 Emg Phone: 802-240-9803
 Email: wstone@HannaBarbera.com

Bills Sent to Fred Flintstone (#1980)

Status: Billing Problem
 Addr: 1400 Rock Road Home Phone: 802-987-6578
 Addr: Work Phone: 802-784-8287
 City: Winooski Cell Phone: 802-878-9892
 State: VT Zip Code: 05404 Emg Phone:
 Email: stones@HannaBarbera.com

Next Step Edit Patient Edit Account Reassign Account Make Appt Reprint Enc Form Billing FKey Set

Two Seperate Family Accounts

3.2.2 Function Keys on the Demographics Screen

From this screen, you can jump into the patient or family editors (**notjane**, **fame**), assign the patient a new guarantor or custodian, or reprint the encounter form. You can also run many basic Partner programs, including scheduling, charge posting, and billing programs. Whatever task you jump into, you can always return to this screen by pressing **F12**. Read the function key descriptions below to learn more.

[F1 -- Next Step]

Press **F1** (or **Page Down**) to continue the check-in process and move to the Insurance step. Any demographic changes will be saved.

[F2 -- Edit Patient]

Press **F2** to run the Patient Editor (**notjane**) for the patient shown. From **notjane** you can view and edit immunization information, run reports on the patient's diagnosis and procedure history, and perform other patient related functions.

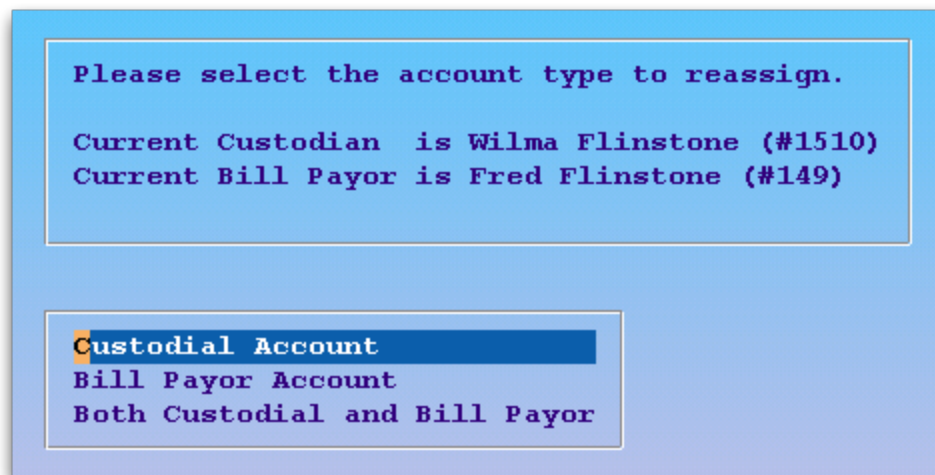
[F3 -- Edit Account]

Press **F3** to run the Family Editor (**fame**) for the guarantor or custodian of the patient. If the patient has two different accounts as custodian and guarantor, Partner will ask you which account you wish to edit.

In **fame** you can review and revise complete account information, run various reports on the billing history, and perform other account-specific actions.

[F4 -- Reassign Account]

Press **F4** to *change* the child's custodian or guarantor account. You will see the following:



After making your selection, Partner will ask you to find the new custodian or billing account. If the account is not in your system yet, you can add it immediately.

[F5 -- CUSTOMIZABLE]

The **F5** key can be set to any tool or function in Partner. For example, if your office uses the Phone Encounter Note (**pen**) program, PCC can change **F5** so that it runs **pen** for the current patient.

[F6 -- Make Appt]

Press **F6** to run **sam**, the Partner scheduler. If your office does not use **sam**, or you need a function key for generating instant encounter forms, PCC can configure **F6** to run **encount** instead.

[F7 -- Reprint Enc Form]

Press **F7** to print an encounter form for the appointment. Encounter forms are generally printed a day or more in advance of a visit, but if you have changed the patient's name or other important information, you may want to reprint the encounter form.

[F8 -- Billing FKey Set]

Press **F8** to change the function keys on the screen to billing-related programs. **checkin** is a great program for a biller who needs to hop among programs such as **oops**, **pip**, and **checkout** while still viewing important demographic information.

The new function keys that will appear look like this:



[F1 -- Next Step]

Press **F1** to save any changes and move to the Insurance page.

[F2 -- Correct Mistakes]

Press **F2** to run the **oops** program, where you can modify previously posted charges and fix

mistakes.

[F3 -- Post Charges]

Press **F3** to run the **checkout** program and post charges.

[F4 -- Post Ins Payments]

Press **F4** to run the **pip** program and post insurance payments or adjustments.

[F5 -- Post Reg Payments]

Press **F5** to run the **pam** program and post personal payments or adjustments.

[F6 -- Form Letters]

Press **F6** to open the form letter screen for patients. You can generate an excuse letter or another patient form.

[F7 -- Refund]

Press **F7** to run the **refund** program and post refunds or adjustments.

[F8 -- Checkin FKey Set]

Press **F8** to switch the function keys back to the standard set for this screen.

[Page Down] and **[Page Up]**

Press **Page Down** to continue to the Additional Demographics screen. Press **Page Up** to go backward to the Balance and Copay screen. All changes on this page will be saved. If you do not wish to save changes, you should press **F12**.

3.3. Additional Demographics

The second screen in **checkin** shows extra demographic information and allows you to jump into other basic Partner programs.

3.3.1 Updating Additional Demographics

In addition to Name, date of birth, primary care physician, sex, and status, the screen includes race and ethnicity, preferred language, and confidential contact preferences.

Pat PCC (#3336) Checkin - Additional Demographics Step 2 of 5

First Name: Born:

Last Name: Age:

Physician: Sex:

Status:

Ethnicity:

Race:

Preferred Language:

Other Language:

Other Language:

Patient Confidential Communication Preference:

Contact Name:

Method:

 No Preference (Custodial Name and Mailing Addr. will be used.)

Use the **Enter** and **Backspace** keys to move among the fields and make changes. Press **End** to erase the text after the cursor.

In some fields, you can use an asterisk (*) to get a list of possible choices.

Preferred Language:

Other Language:

Other Language:



- Somali
- South Ndebele
- Southern Sotho



Preferred Language:

Other Language:

Other Language:

You may only select a single Confidential Communication Preference. Once selected, fields particular for that selection will appear.

For example, if the patient has a private address distinct from their parents, you can select Mailing Address and enter that new address.

Patient Confidential Communication Preference:
Contact Name: Debby Rubble
Method: Mailing Address: 224 Birdstock, Apt 4
 Cell Phone
 Work Phone City: Bedrock
 Home Phone State: NV Zip Code: 881122
 Text
 E-mail
 No Preference (Custodial Name and Mailing Addr. will be used.)

Select a method...

...and related fields appear.

Why Track This Information? Race and ethnicity, language, and confidential communication preferences help your practice in several ways.

- You can use the communication preferences to work directly with patients on confidential issues or on the maintenance of medical concerns that are their own responsibility.
- You can use any of these fields on form letters.
- You can limit some SRS reports by these fields.
- You can use the Patient Recaller (**recaller**) to calculate patient population numbers, generate patient lists, or generate mailings for a certain demographic based on a set of criteria.
- These fields are related to both the ARRA incentive and PCMH programs.

Ethnicity, Race, and Language Lists: The Ethnicity, Race, and Language fields are limited to values accepted by the ARRA Meaningful Use standard. You may enter more than one race by using a comma between entries.

Configuration Options: These fields appear in both the Patient Editor (**notjane**) and Patient Checkin (**checkin**). You can use the Configuration Editor (**ced**) to hide the Confidential Communication Preferences from **checkin** if your office does not collect this information and the fields distract from your checkin workflow.

3.3.2 Function Keys on the Additional Demographics Screen

From this screen, you can jump into the Edit Policies (**policy**) program, the patient's immunization record (**imms**), the Patient History program (**patinfo**) and the list of patient form letters. Whatever task you jump into, you can always return to this screen by pressing **F12**. Read the function key descriptions below to learn more.

[F1 -- Next Step]

Press **F1** (or **Page Down**) to continue the check-in process and move to the Insurance step. Any demographic changes will be saved.

[F2 -- Edit Policy]

Press **F2** to run Edit Policies (**policy**) for the patient shown. From **policy** you can review and update the

patient's insurance policies.

[F3 -- *Imms Record*]

Press **F3** to run the Immunization History (**imms**) for the patient. You can review and update immunization history, or generate an automatic school form.

[F5 -- *Patient History*]

Press **F5** to run Patient History (patinfo) for the patient. You can review a history of a patient's diagnoses, organized by visit date or by frequency of billed diagnosis.

[F6 -- *Patient Forms*]

Press **F6** to jump directly to the form letter generator found in the Patient Editor (notjane). You can generate any of your custom patient form letters for this patient.

[Page Down] and [Page Up]

Press **Page Down** to continue to the Insurance screens. Press **Page Up** to go backward to the Demographics screen. All changes on this page will be saved. If you do not wish to save changes, you should press **F12**.

3.4. Eligibility Screen

The Eligibility page, which appears in **checkin** when the patient has an appointment, displays the patient's primary insurance policy and the most recent visit eligibility information.

You can review and edit status and notes about eligibility for the appointment, review the Partner-summarized eligibility report (if available), or send a request for information to the insurance carrier (if participating).

3.4.1 Reading the Eligibility Screen

The eligibility step in **checkin** looks like this:

Pat PCC: 2974 Patient Eligibility Step 2 of 4

Patient: Pebbles Flinstone (12/02/2001)
PCP: None Subscriber: Wilma Flinstone
Appointment: 04/20/09 10:45am Sick Call

PRI: SuperHealth \$10 CERT: 999999999 GRP: ABCD

Notes: Status: Validated Date Verified: 04/20/09
Notes regarding eligibility status.

Eligibility Response Date: 04/21/2009 (ACTIVE)

Service: 04/21/2009
Enrollment: 12/31/2007
PROFESSIONAL (PHYSICIAN) VISIT - OFFICE
Active Coverage
MSG: REFERRAL IS REQUIRED
Auth: Yes
\$25 Individual Copayment Visit
MSG: MEDICAL CARE - PRIMARY CARE (OB/GYN), NURSE PRACTITIONER
\$35 Individual Copayment Visit
MSG: MEDICAL CARE - OTHER COVERED PROVIDER

Next Step Scroll Backward Scroll Forward Edit Policies Edit Patient Request Elig See Full Report Change Status

The top of the screen shows patient and policy information, the middle shows fields for entering status, date, and notes, and the bottom of the screen shows Partner's summary of information sent by the insurance carrier. The date of the most recent eligibility request, along with Active/Inactive status, appears in red.

After reviewing the eligibility information on the screen or using function keys to gather more information, you may update the status, date, or notes and press **F1** or **Page Down** to continue to the next step.

Updating the Information: If a patient's primary policy changes, you can request a new eligibility report by pressing [**F6** - *Request Elig*]. If you would like Partner to *automatically* request a new eligibility report whenever a patient's primary policy changes, ask PCC Support to activate that feature.

3.4.2 Function Keys on the Eligibility Screen

[**F1** -- *Save, Next Step*]

Press **F1** to save your changes. If you are viewing the Patient Eligibility screen in **checkin**, you will continue to the next step in the checkin process.

[**F2** -- *Scroll Backward*], [**F3** -- *Scroll Forward*]

If the eligibility details extend below the screen, press **F2** and **F3** to scroll that portion of the screen.

[**F4** -- *Edit Policies*]

Press **F4** to visit the patient's policy screen, where you may review or edit their insurance policies.

[**F5** -- *Edit Patient*]

Press **F5** to visit the Patient Editor (**notjane**). Press **F7** from **notjane** to edit the account.

[**F6** -- *Request Elig*]

Press **F6** to check eligibility. If the patient's primary insurance allows automatic eligibility requests, Partner will perform the check and update the eligibility information on the screen.

[**F7** -- *See Full Report*]

The screen includes a summary of the carrier's eligibility report. To view the report, press **F7**.

[**F8** -- *Change Status*]

Press **F8** to jump down to the Status field.

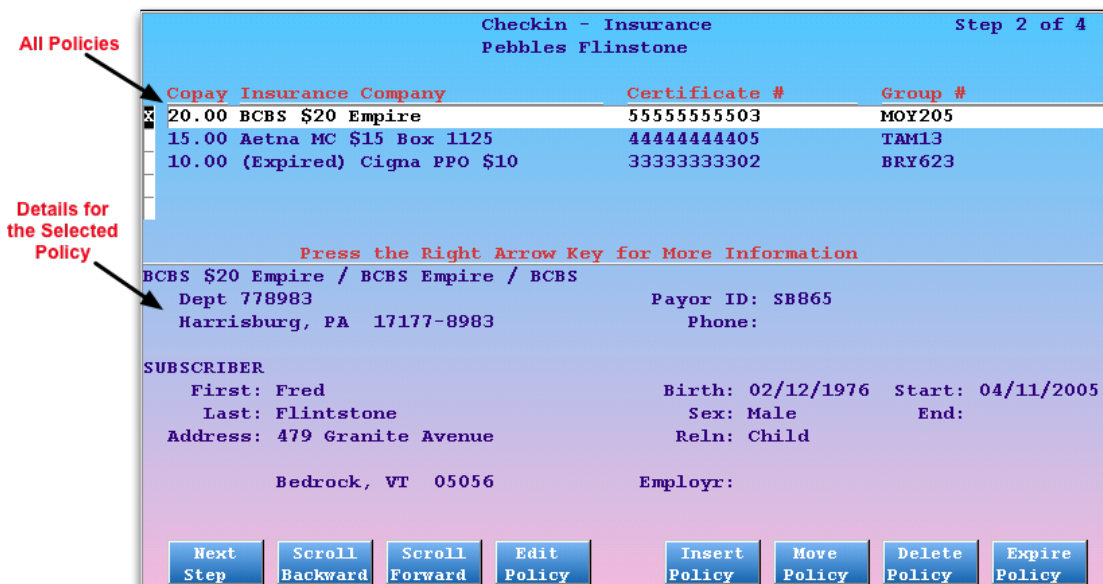
3.5. Policy Screen

The Insurance page shows you a list of all insurance policies associated with the patient. You can review a patient's active and expired policies. You can edit, add, move, delete, or expire any policy.

Insurance Policy Manual: For a complete guide to the insurance policy screen in Partner, read *Managing Insurance Policies*. A brief description of the page and how to use it is below.

3.5.1 Reading the Insurance Screen

The second page of **checkin** looks like this:



At the top of the screen is a list of all insurance policies for this patient. The list shows the copay, company name, and certificate and group numbers. Complete details about the selected policy are shown at the bottom of the screen.

Use the arrow keys to select a policy on the screen. Once you have selected a policy, full details appear at the bottom of the screen. You can then use the function keys to make changes to the selected policy or insert a new policy above it.

If a family has a long history of changing policies, you can use [F2 -- *Scroll Backward*] and [F3 -- *Scroll Forward*] to view the rest of the policies.

3.5.2 Function Keys on the Insurance Screen

From this screen you can edit, add, move, delete, or expire insurance policies on the patient's guarantor account.

[F1 -- *Next Step*]

Press F1 to save any changes and move on to the Balance and Copay page.

[F2 -- *Scroll Backward*] and [F3 -- *Scroll Forward*]

Press F2 and F3 to move up and down through a large list of insurance policies. Normally you can use the arrow keys to move among the listed policies, but if the account has more old policies than will fit on the screen, you can use F2 and F3 to scroll through the list.

[F4 -- *Edit Policy*]

Press F4 to edit the currently selected insurance policy. The bottom section of the screen will shift to show you fields for editing the policy.

[F5 -- *Insert Policy*]

Press F5 and follow the prompts on the screen to insert a new insurance policy. While adding a policy,

you will see options for copying a recently edited policy from a family member and for inserting the new policy to all family members.

[F6 -- Move Policy]

Press **F6** to move the currently selected policy up or down within the list of policies. Expired policies will still auto-sort below active policies, but you can control which active policy is primary or secondary.

[F7 -- Delete Policy]

If you created a new policy by mistake, you can press **F7** to delete it. You will be shown a confirmation screen to make certain you really wish to erase the plan from the account's records.

[F8 -- Expire Policy]

Press **F8** to expire the selected policy. The screen will switch to allow editing, and the cursor will move to the "End" date field. After expiring a policy, the screen will offer to expire the same policy for patients who share a guarantor with the current patient.

[Page Down] and **[Page Up]**

Press **Page Down** to continue to the Balance and Copay screen. Press **Page Up** to go backward to the Demographics screen. All changes on this page will be saved. If you do not wish to save changes, you should press **F12**.

3.6. Balance and Copay

The Balance and Copay screen shows the expected copay, an aging summary of outstanding balances, and any available eligibility information for the patient. Function keys provide access to additional information and a tool for posting a copay payment.

3.6.1 Reading the Balance and Copay Screen

The third step of **checkin** looks like this:

Copay →

Account Copay Note →

Aged Balances →

Post a Payment →

```
Checkin - Copay and Balance Step 4 of 4
***** COPAY: $20.00 *****
Copay Note: Copay requires $20 for first sick, but no copay after that
Policy: Cigna PPO $20
***** PERSONAL BALANCE: $37.00 *****
Account: Fred Flintstone (#1980)
AGING  0-29  30-59  60-89  90-119  120+  CREDIT  BALANCE
PER:   0.00  0.00  0.00  0.00  37.00  0.00    37.00
INS:   0.00  0.00  0.00  0.00  128.00 0.00    128.00
Med:   0.00  0.00  0.00  0.00  0.00  0.00    0.00
```

Buttons: Finish Checkin, Show Detail, TOS Payments, Print

The guarantor account name and PCC number appear at the top of the screen. The guarantor for the account is usually a parent, but could also be an organization or the patient herself. The account shown is responsible for the patient's bills; if you need to change the Guarantor account, press **Page Down** to return to the first page of **checkin** (Demographics) and press [**F4** -- *Reassign Account*]. See the Demographics section for more information.

In the main viewing window of the Balance and Copay screen, Partner shows:

- **Copay Amount:** This is the expected copay for the patient's primary insurance policy. It may be a new insurance policy, or it may expire tomorrow, but the amount is the patient's *current* copay. Some insurance companies have special copay rules for sick and well visits; the copay listed is the default copay for the patient's primary insurance plan.
- **Policy:** The insurance policy from which the copay information is drawn.
- **Copay Note:** The guarantor account's Copay Note, stored in the Family Editor (**fame**). This note will only be shown if the insurance policy in question requires a copay.
- **Aging Balance Totals:** Underneath the copay is a brief aging balance summary for the account. You can see outstanding balance amounts that are Personal (to the account holder), pending one or more insurance companies, or pending your default Medicaid company. The balances are aged into 30-day categories. Amounts are aged by payor responsibility, which means that old balances that just recently became personal will be under the 0-29 day column in the Personal line.

3.6.2 Function Keys on the Balance and Copay Screen

[**F1** -- *Finish Checkin*]

Press [**F1**] to complete the patient check in. Partner will set the patient's visit status to "Checked In" and inform any EHR or EMR that the patient has arrived.

[**F4** -- *Show Detail*]

Press **F4** to run the Collection Report (**coll**) and review a summary of the family's outstanding balances. For more information, read the Collection Report manual.

[**F5** -- *CUSTOMIZABLE*]

If your staff frequently needs to run a specific program or report when they are finished checking in a patient, you can add a function key for that program on this screen. The **F5** key is customizable and can be configured through the "Patient Check In" section of the Configuration Editor (**ced**). Call PCC support at 1-800-722-1082 for assistance.

[**F6** -- *TOS Payments*]

Press **F6** to visit the Personal Payment screen and post a time-of-service payment. See the section below for more information.

[**F8** -- *Print*]

Press **F8** to print the contents of the display window, consisting of the copay, aging balance chart, and

eligibility information.

4. Post a Copay or Other Payment During Checkin

Use the Personal Payment screen in **checkin** to post a copay or other payment received during checkin.

Step 1: Open the Personal Payment Screen

Press [F6 -- *TOS Payments*] from the Checkin Appointment List or from the third page of the **checkin** program to open the Personal Payment screen:



Checkin - Personal Payment

Guarantor Fred Flinstone
10/23/07 Appointments

Patient	Copay	Insurance	Visit Reason
Pebbles Flinstone	\$ 20.00	BCBS \$20 Empire	Sick Call
Total Copay: \$ 20.00			
Old Personal Bal: \$ 30.00			
Total Possible Bal: \$ 50.00			

Date	Payment/Adjustment Type	Amount	Check #	Provider
10/23/07		\$ 0.00		Casey

Save Payment New TOS Pmt Balance Details

Step 2: Review Visit Information

The guarantor for the current patient is shown at the top of the screen, along with details about each patient visiting. You may see one patient or several siblings.

Responsible Account

Guarantor Fred Flinstone
10/23/07 Appointments

Patient	Copay	Insurance	Visit Reason
Pebbles Flinstone	\$ 20.00	BCBS \$20 Empire	Sick Call
Total Copay: \$ 20.00			
Old Personal Bal: \$ 30.00			
Total Possible Bal: \$ 50.00			

Estimated Total Copays For Today

Estimated Total For Today

The Copay and Insurance columns indicate the expected copay for the visit. If several patients with the same account have appointments, you will see multiple patients and the total copay amount. Confirm this information with the patient or guardian visiting the practice.

Old Personal Balance: The screen also displays the account's personal balance. While the screen is designed for posting a copay, you may post a payment towards the old balance. To research the charges, press [F4 -- *Balance Details*] to run the Collection Report.

Step 3: Enter Date, Payment/Adjustment Type, Amount, Check #, and Provider

Enter payment details in the appropriate fields. Use **Enter** and **Backspace** to move among the fields.

Total Possible Bal: \$ 50.00

Date	Payment/Adjustment Type	Amount	Check #	Provider
10/23/07	Check	\$ 50.00	434	Casey

Step 4: Optional: Press [F3 -- *New TOS Pmt*]

Press **F3** to add an additional payment. If the payment consists of two or more checks or cash payments, use **F3** to add new lines.



Total Possible Bal: \$ 50.00

Date	Payment/Adjustment Type	Amount	Check #	Provider
10/23/07	Check	\$ 20.00	434	Casey
10/23/07	Cash	\$ 30.00		Casey

Save Payment New TOS Pmt Balance Details Delete TOS Pmt

If you need to remove a line, use the arrow keys to select it and press [F5 -- *Delete TOS Pmt*].

Step 5: Press [F1 -- *Save Payment*]

Press **F1** to save the payment. If your practice prints receipts, one will be generated immediately.

5. Review Checkin Status: Who Checked a Patient In?

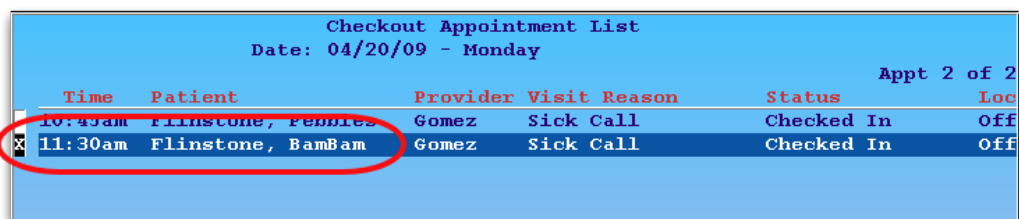
When a patient is checked in, Partner records the time of checkin, the user who checked them in, and the office location. You can view that information using [F5 -- *Show Details*] in **checkout**.

Step 1: Run Checkout

Run the **checkout** program. You can run **checkout** from the Daily Operations window.

Step 2: Select the Appointment

Use the arrow keys to select an appointment.

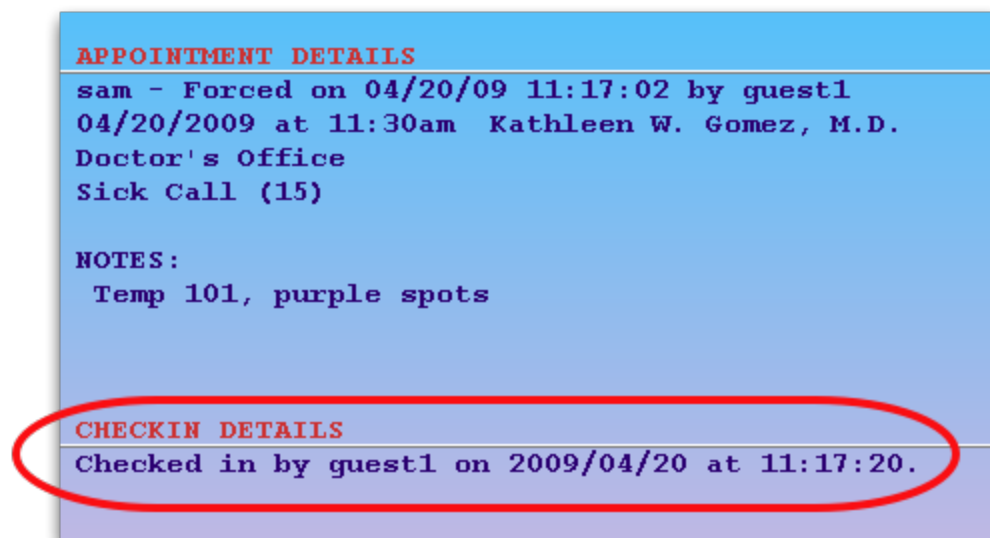


Checkout Appointment List						
Date: 04/20/09 - Monday						
Time	Patient	Provider	Visit Reason	Status	Loc	Appt 2 of 2
10:45am	Flinstone, Pebbles	Gomez	Sick Call	Checked In	Off	
11:30am	Flinstone, BamBam	Gomez	Sick Call	Checked In	Off	

Step 3: Press [F5 -- *Show Details*]

Step 4: Review Appointment and Checkin Information

The Detailed Appointment and Demographic Information screen shows patient information as well as the time the patient was checked in and who checked them in.



APPOINTMENT DETAILS
sam - Forced on 04/20/09 11:17:02 by guest1 04/20/2009 at 11:30am Kathleen W. Gomez, M.D. Doctor's Office Sick Call (15)
NOTES: Temp 101, purple spots
CHECKIN DETAILS
Checked in by guest1 on 2009/04/20 at 11:17:20.

Tip: The details screen also displays useful account information. Press **Page Down** to see more.

Press **F12** to return to the **checkout** appointment list.