Checking in a Patient

Last Modified on 02/19/2024 3:59 pm EST

Version 21.3

> **Path: Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button**
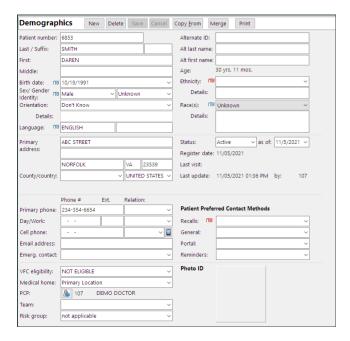
About

A complete patient check-in process includes:

- Verifying Patient Demographics
- Verifying Family Contacts
- Verifying Insurance Information
- Marking the Patient as Checked-In and Collect a Copay
- Check-in a Patient

Getting into the habit of doing this for every patient, at every appointment ensures that the patient's information in OP is up to date.

Verifying Patient Demographics

1. Access the Calendar window by following the path above.
2. Click the patient's appointment to select it.
3. Click the **Patient Chart** button in the Clinical, Practice Management, or Billing tab.
4. Click **Basic Information** to verify the patient's Demographic information, and make edits if necessary.
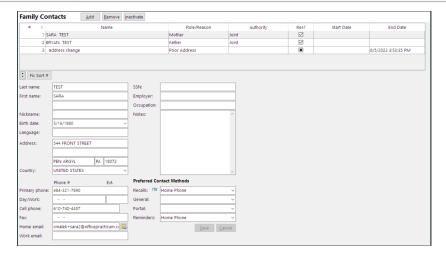5. *(Optional)* If edits were made to the patient's demographics, click the **Save** button.

Verifying Family Contacts

1. In the Patient Chart, click **Family Contacts** and verify the contact information. To add a contact, see **Adding Contacts to a Patient's Chart**.
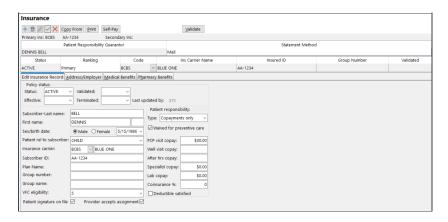
Verifying Insurance Information

1. Click **Insurance** and verify the insurance information and the Patient Responsibility Guarantor. To add insurance, see **Create a New Insurance Record**.
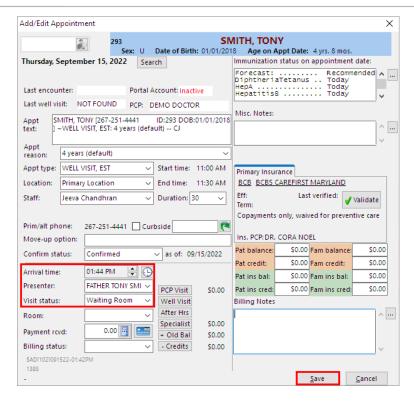

6. Click the **X** button to close the Patient Chart.

Marking the Patient as Checked-In and Collect a Copay

1. On the Calendar window, double-click to open the **Add/Edit Appointment** window.
2. Click the **Presenter** drop-down and select the presenter from the list.
3. Click the **Visit Status** drop-down and select a status from the list. Once a Visit Status is selected the **Arrival time** will update.

7. If a co-pay is collected for this visit, see **Enter a Copay**. Once the copay is entered, the appointment is updated with a **CoPaid** indicator.

8. Click the **Save** button.

Version 20.17

> **Path: Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button**
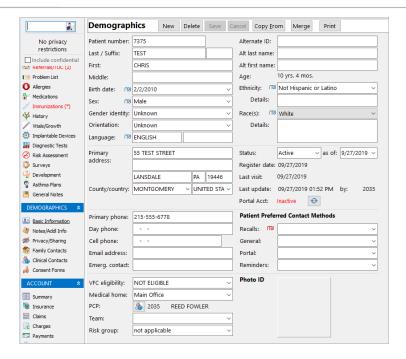
About

A complete patient check-in process includes verifying patient Demographics, Insurance information, and Family Contact information. Getting into the habit of doing this for every patient, for every appointment ensures that the patient's information in OP is up to date. It is also recommended to collect patient copays and balances during check-in so that your Practice's Patient A/R does not grow unnecessarily.
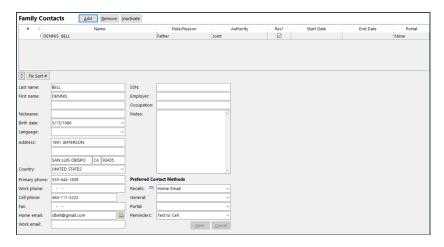
Check-in a Patient

1. Access the Calendar Schedule window by following the path above.
2. Click the patient's appointment once to select it.
3. Click the **Patient Chart** button located in the Clinical, Practice Management, or Billing tab.
4. Click **Basic Information** in the Demographics section of the Chart Navigation Panel.
5. Verify the patient's Demographic information, and make edits if necessary.
6. *(Optional)* If edits were made to the patient's demographics, click the **Save** button.
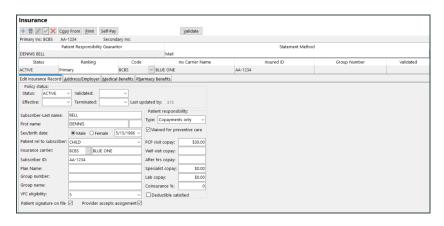
7. Click **Family Contacts** and verify the contact information. To add a contact, see **Adding Contacts to a Patient's Chart**

8. Click **Insurance** and verify the insurance information. To add insurance, see **Create a New Insurance Record**.
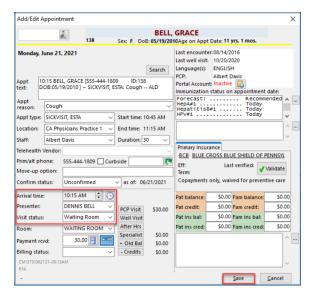

9. Click the **X** button to close the Patient Chart.
10. On the Calendar window, double-click to open the **Add/Edit Appointment** window.
11. Click the drop-down in the **Presenter** field and select the presenter from the list.

12. Select a **Visit Status** from the drop-down menu. This updates the Arrival time.

13. If a co-pay is collected for this visit, see **Enter a Copay**. Once the copay is entered, the appointment is updated with a **CoPaid** indicator.

14. Click the **Save** button.