

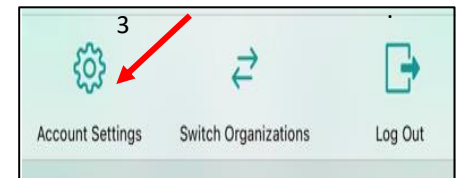
eCheck-In

With eCheck-in via MyChart, patients are able to update their record right from their app. Patients will be able to update their demographics, insurance, allergies, medications, and their problem list. They can will also be able to pay their copay, complete assigned questionnaires, and sign documents. This will help speed up the registration and rooming process.

MyChart active patients will get a notification 3 days prior to their appointment, offering them to utilize eCheck-In. Depending on their communication preferences they might get an email, a push notification, or both. The notification function is only available if they have their push notifications enabled.

How to Enable Push Notifications

1. When the patient first signs into MyChart, they will click on their account picture or their initials if no photo has been added.
2. They will be taken to a screen with the following options;
 - Account Settings • Switch Organizations • Log out
3. They will select **Account Settings**
4. They will be taken to the app settings. The last option is Notifications.
 - They will click on the **Switch Icon** ()
5. Once they have clicked, the switch icon should change to green indicating that feature has now been enabled. ()



eCheck-In Patient Workflow


- The patient will get the notification either via the app or their email. If they click on the notification, they will be taken directly into the app or they can go to the MyChart app manually.
- On the main screen they can see the details about their upcoming appointment. They will click **eCheck-In** to begin the eCheck-In process.

Demographics



- The first section is verifying the demographic information on file is current and accurate. They can make edits to the information using the **Edit** button.
- Once they have confirmed the accuracy, they will scroll down and click the blue banner that states

This information is correct



- Once they have marked the information as correct, the button will change to green and give them the option to continue into the next section. They will click 

Insurance



- The next section is verifying their insurance information on file is current and accurate. They can see the guarantor info under “Responsibility for Payment”.
- They will verify the guarantor information is correct.
- They will mark if they want to use their insurance for the visit and they can also view what insurance they currently have on file.
- They will also have the ability to add coverage.

Adding a Coverage

- They will search for the name of the insurance and select the correct one from the list.
- They will fill in the information such as member number and if they are the policy holder.
- They will click on  and  to take pictures of the insurance card to upload.
- Once they have taken the images, they will click **Submit**. The images will take a few seconds to upload.
- Once they are taken, they can view them to make sure it is a clear image or remove them.
- Once both images are added they can click **Submit** again.
- This will send the insurance information out to be verified (Similar to RTE). It may take up to 45 seconds to verify.
- Once the response has come back, they will click **Next**.


Payments




- The next section is the payments section where they can pay their copay.
- They can choose to pay their copay now or later at the office.
- They will select which option they would like and click **Next**.

- If they selected to pay it now, it will ask them to choose which card they would like to use.
- If they have already added a card to their MyChart account, it will be saved for quick selection.
- If they have not used a card before they will have the option to add a new payment method.
- After they have selected the correct card, it will give them a summary including the total amount that will be charged, and which card will be used.
- If everything is correct, they will click **Next**.
- They will get a notification stating whether their payment was successful or not. They will also get a message that states their card will not be charged until they check-in for their appointment.
- They will then click **Next**.

Allergies

- The next section is verifying their allergy information on file is current and accurate. They can review the list of allergies they already have on file, remove any that are no longer relevant, or add an allergy.
- To add an allergy they will click 
- They will then choose what the name of the allergy is, select the reaction to the allergen, and enter a start date. Scrolling down will display an option to add a comment if needed.
- Once they have completed the questions appropriately, they will click **Accept**.
- The recently added allergy does not go into the “Allergies on File” section. It goes into the “Allergies You Reported” section, until reviewed by clinical staff later.
- Once all allergies have been added or confirmed as accurate, they will click **This Information is Correct** and then **Next**.


Health Issues (Problem List)

- The next section is verifying their health issues on file are current and accurate. They can review the list of the health issues they already have on file, remove any that are no longer relevant, or add a new health issue.
- To report a new health issue they will click 
- They will search for the health issue name and choose the closest match from the suggestions.

- They will enter a start date for the health issue, enter any relevant comments, and then click **Accept**.
- It will then be listed in the “Health Issues You Reported” section until verified by the provider.
- Once all health issues have been added or confirmed as accurate, they will click **This Information is Correct** and then **Next**.

Medications



- The next section is verifying their medications on file are current and accurate. They can review the list of the medications that are currently on file, remove any that they are no longer taking, or add a new medication.
- To add a new medication they will click  **Report a medication**
- They will search for the medication name and choose the closest match from the suggestions.
- They will enter a start date for the medication, enter any relevant comments, then click **Accept**.
- It will then be listed in the “Medications You Reported Taking” section until verified by clinical staff.
- Once all medications have been added or confirmed as accurate, they will need to select the pharmacy they would like to use for this visit.
- Once they make their selection, they will click **This Information is Correct** and then **Next**.

Questionnaires




- The next section is completing all assigned questionnaires. The Questionnaires that are assigned are based upon the department’s preferences.
- They will complete the questionnaires as appropriate. When completed they will click **Continue**.
- They will have the chance to review their answers and make changes if necessary.
- If the information is accurate, they will click **Submit**.

Sign Documents



- The final section is signing documents. They will sign any documents that have been assigned based upon the department’s preferences.
- All departments will have a HIPAA that will need signed if it has not already been signed.

- They will click **Review and sign**
- They will see a digital version of the document to read through.
- Once they have read the document, they will click in this  box
- They will then have the option to Auto-generate a signature or Draw to Sign.
- They will make their selection and can select Save for Future Use if they would like.
- They will click **Accept**.
- They will see the signature with a green checkmark meaning they have completed the task.
- They will click **Accept**.
- They will then have a chance to review the document one final time.
- If everything is good, they will click **Submit**.
- They should get a message stating “Thanks for using eCheck-In! The information you’ve submitted is now on file”.
- The eCheck-In patient workflow is now completed.