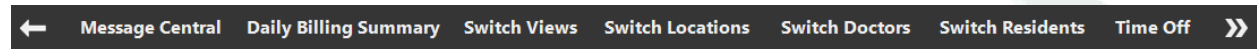


Check-In Process

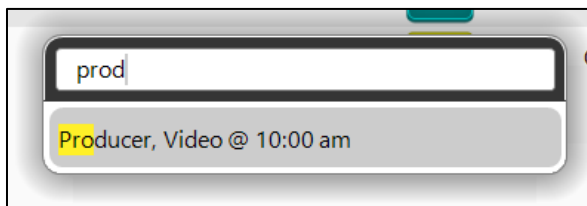
Chart Central

Check-in for new and existing patients is completed from Chart Central.

- Medical Records > Chart Central
 - Switch Views (Administrative)
 - Switch Locations
 - Switch Doctors




- Search for Patient: Click  and type the patient's name.



- Change the **Status** to 

Patient Information

- Chart Central > 

Patient Info

- Verify Patient Demographics: Name, Address, Phone, Email, DOB, Sex/Gender, Race/Ethnicity and Language.
- Enter a Preferred Name if the patient prefers a nickname rather than their legal name.

Note: Additional personal information may be required by the practice.

Practice Info

- **Location:** Select the location where the patient is being seen.
- **Provider:** Add the provider who the patient is seeing.
- **RDr:** If applicable, select the referring doctor.
- **PCP:** If applicable, select the primary care physician.

Practice Info			
	Location	1	Main Office
	Provider	3	Test, Sarah, M.D.
	RDr	18	MEDS, NP
	PCP	10	Portal, Jack, NP
	Resident		
	Nurse Practitio...		
	Physician Assis...		
Chart #		71930	

Insurance

- Verify the patient’s insurance info.
 - If the insurance expired, click on the insurance and enter the expiration date in the Member area.

Insurance 02/07/2022

EXCELLUS CNY BLUESHIELD Insured: **Video Producer**

Onset 04/15/2024 Referral

[+Add New Insurance Company](#)

Member

Video Producer ID#

07/16/1991 Not Expired

S = Self Bill Order = 1 Onset 04/15/2024

Expired

- For new insurance, scan the insurance card and add new info.
- Verify eligibility.

Secondary Address

A secondary address is required for patient's less than 18 years of age.

- Click the **2nd Address** button at the bottom of the screen to enter the responsible party's name and address for the patient's balance. The end date will auto-calculate based on the child's birthday.
- Check **Infinite End Date** for Permanent Billing Address.

Note: The 2nd Address button will appear blue if one exists.

2nd Address

Patient Portal


- Click **Patient Portal** at the top of the screen.
- Click **Print Activation Letter** to print the letter.
- Check the box next to **Code given verbally** if the letter wasn't printed.
- Click **Patient Declined** if the patient declined the portal.

Note: If the patient does not have an active portal account, some practices require an activation letter be offered each visit.

Rx Coverage/Pharmacy

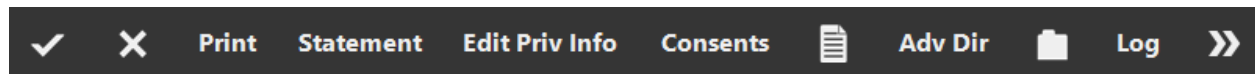
- Add Rx Coverage information.
- Verify the patient's primary, secondary and mail order pharmacy.

HIPAA

Access HIPAA  from Patient Information or Chart Central. Complete all that is required by the practice.

- Check all that apply for **Appointment** and **Medical** Information.
- Under **Contacts**, enter emergency contacts, parents of pediatric patients, relatives or individuals who have permission to access the patient's medical record.

- Emergency contacts may be required for some insurances.
- Custody and legal documents may be linked to this page.
- Ask the patient, responsible party or POA to add their **signature**.
- Click **Adv Dir** to add Advanced Directives and link legal forms.
- Click **Consents** to manage consents signed by the patient, representative or responsible party. Consents should be finalized so the signature cannot be inadvertently removed.



Required Documentation

This is an optional feature that can be implemented.

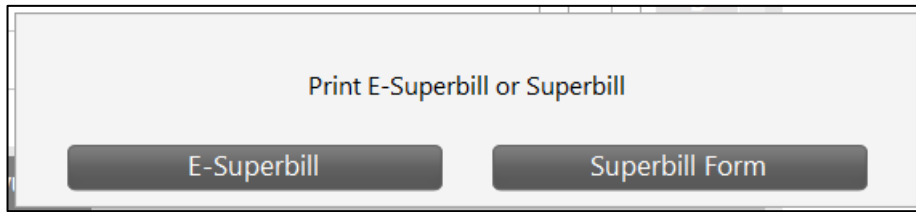
- Chart Central >
- Complete consents and required documents.
 - a. Required documentation incomplete.
 - b. Required documentation complete.
 - c. No required documentation for the patient.

E-Superbill (ESB)

- Chart Central >
- **Pay Code:** Cash, Check or Card
- **Check#:** Enter Check # or Credit Card Authorization #
- **Amt:** Enter the Dollar Amount
- **+ Add Additional Payment:** Add optional second payment
- **Allocate Payments:** Set up payment allocation for Co-Pay, Prior Personal Balance, Unapplied and Future ESBs. Apply any unapplied payments.

Payment #1			
Pay Code			Op
Check#		Amt	0.00
+ Add Additional Payment			
Allocate Payments		Pending Allocation: \$ 0.00	
Copay	0.00	Allocate Re...	
Prior Bala...	0.00	Allocate Re...	Allocate by Dr/Spe.
Unapplied	0.00	Allocate Re...	Allocate by Dr/Spe.
Future ES...			
Apply Un...			

- **Print:** E-Superbill (Receipt)

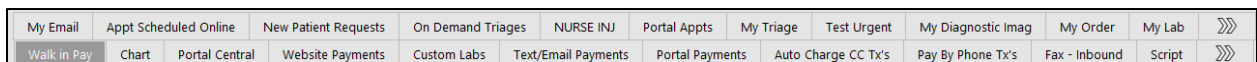
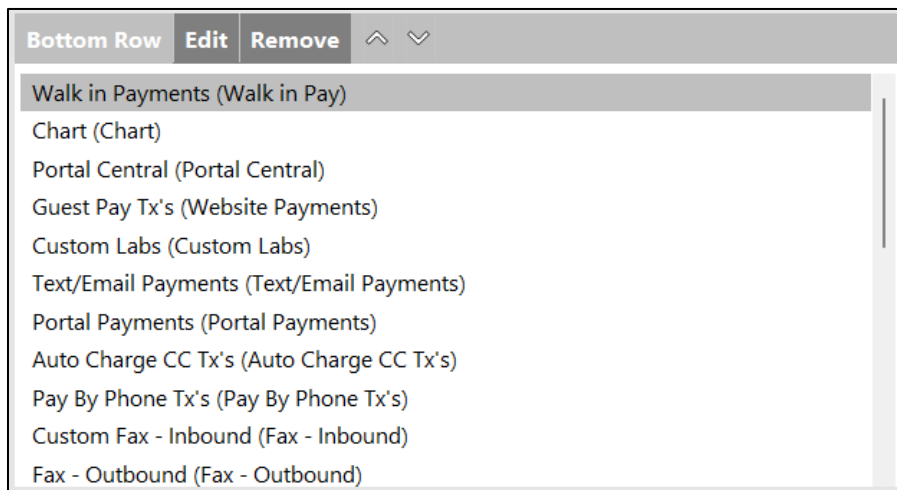


- **Status:** Change **Status** from Arrived to Waiting

Walk-In Payments

You can add a Walk in Pay button to the bottom button line on Chart Central.

- Chart Central > >
- Select **Walk in Payments** from Bottom Row Options to move it to the Bottom Row box. Optional: Click **Edit** to change the Display Name.



- Click **Walk in Pay** and select the patient from the lookup.
- **Pay Code:** Add Payment Code Cash, Check or Credit Card.
- **Check#:** Enter the Check Number or Credit Card Authorization Number.
- **Amt:** Enter the Dollar Amount.
- **+Add Additional Payment**
- **Print:** E-Superbill (receipt), if requested.

Balance Cash Drawer

- Practice Management > Billing > Superbills > Cash Out Report
- Print Report for Location and Initials

Resources

medent manual:

www.medent.com/htmlmanual/html/v237/patientinformationnewpatientregistrationpat.html

www.medent.com/htmlmanual/html/v237/hipaaprivacyinformationpat.html

www.medent.com/htmlmanual/html/v237/consentschart.html

www.medent.com/htmlmanual/html/v237/requireddocumentationcc.html

www.medent.com/htmlmanual/html/v237/editviewsuperbillssb.html

www.medent.com/htmlmanual/html/v237/walkinpaymentcc.html

www.medent.com/htmlmanual/html/v237/cashoutreportsb.html