medent

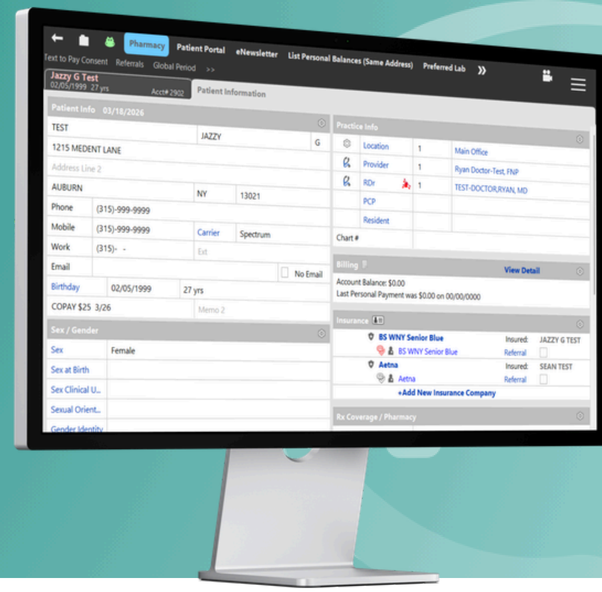
# So you need to check in a patient in medent.

## What's next?

The Check-In process for new and existing patients is completed from Chart Central.

Medical Records > Chart Central > **Switch Views**

**Switch Locations** **Switch Doctors** Switch to Admin View (F7)



## Change Status

- In Chart Central, in Admin View, click and type a patient name or do a partial name search.
- Change the Status to Arrived .

## Patient Info

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

Additional Personal Information may be required by the practice.

## Practice Info

- Add Location where the patient is being seen.
- Add Provider who the patient is seeing.
- If applicable, enter the Referring Doctor (RDr).
- If applicable, enter the Primary Care Physician (PCP).

**Click here for more info on Patient Registration.**

## Insurance

- Verify insurance information.
  - If Insurance is expired, add Expiration Date.
  - Scan Insurance Card and add New Insurance information.
- Verify Eligibility.

**NOTE:** A Secondary Address is required for patients under 18 years of age. Click **2nd Address** at the bottom of the screen and 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. For a Permanent Billing Address, check the box next to Infinite End Date .

## Rx Coverage/Pharmacy

- Verify the Primary, Secondary and Mail Order Pharmacy.
- Add Rx Coverage Info.

## Patient Portal

- Click **Patient Portal** .
- Click Print Activation Letter to print the letter.
  - Check the box next to Code given verbally if the letter has not been printed. Code given verbally
  - Click Patient Declined if the patient declines.

Some practices offer a letter at each visit.

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# Check-in process continued...

After verifying patient demographics, practice information, insurance, pharmacy and Patient Portal, you should review HIPAA, Required Documentation and the E-Superbill.

## HIPAA

HIPAA may be accessed from Patient Information or Chart Central. Complete all that is required by your practice.

- Appointment Information: Check all that apply.
- Medical Information: Check all that apply.
- Contacts: Enter Emergency Contacts, Parents of Pediatric Patients, Family Members 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.
- Signature: Ask the Patient, Responsible Party or POA to add their signature.
- AdvDir: Click to add Advanced Directives and link legal forms.

**NOTE**: Consents may be signed by the Patient, Representative or Responsible Party. Consents should be finalized so that the Signature cannot be inadvertently removed.

**Click for more info on HIPAA, Advanced Directives and Consent.**

**NOTE**: Add a Walk-in Payments button to the bottom of Chart Central. Click it to select a patient and enter the Pay Code, Check #, Amt, Additional Payment and/or Print E-Superbill.

## Required Documents

In Chart Central, click the Required Documentation icon next to the patient's name to complete Consents and Required Documents.

**NOTE:** This is an optional feature that can be implemented. There will be an x through the icon if there is no check for required documentation for the patient. A green checkmark indicates all documentation requirements for the patient have been met.

**Click here for more info on Required Documentation.**

## E-Superbill (ESB)

In Chart Central, click the ESB button ESB next to the patient's name to add payments.

- Pay Code: Cash, Check or Credit Card
- Check #: Check or Credit Card Authorization #
- Amt: Dollar Amount
- Add Additional Payment: Add a second payment
- Allocate Payments: Payment allocation for Co-Pay, Prior Personal Balance, Unapplied and Future E-Superbills. Apply any unapplied payments.
- Print E-Superbill: E-Superbill Receipt
- Status: Change from Arrived to Waiting

**Balance Cash Drawer:**
Billing > Superbills > Cash Out Report: Print Report for Location and Initials