Check In/Check Out

Objective:

- Understanding check-in/out window views, filters and screen sections
- Checking in patient, verifying, editing, adding, scanning information, copay
- Reviewing middle panel information as patient progresses thru clinic
- Checking in a walk-in patient
- Checking out a patient

Hot Key
F10 – Opens the Check-In/Out screen

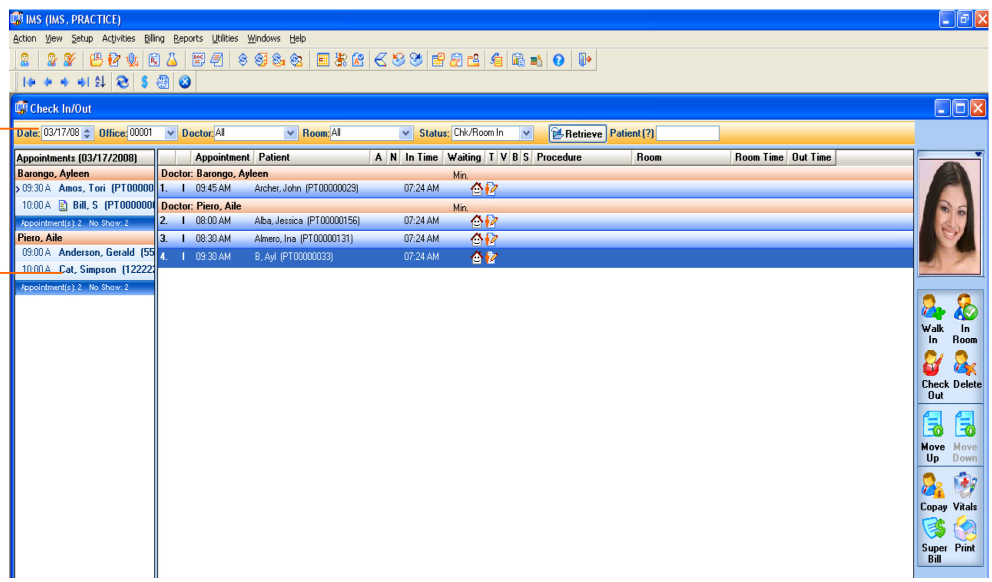
Understand the layout of the Check In/Check Out screen:

Upper panel
consist of filters:
Date
Office
Doctor
Room
Status

Left panel
contains the scheduled appointments by provider.

Middle panel
Displays patients who have arrived at office.

Right panel
Action taken



****

NOTES:

Filters of the Check In/Check Out screen

The upper panel of the screen contains the filters. These filters will change the information viewed in the middle "check in" screen.. The user may wish to filter by Office, Doctor, Room, Status or Patient

Date: Located on the uppermost left of the CICO screen. When you double click on it, it will bring you to the calendar window. Clicking on the arrows provided on the bottom part of the calendar allows one to go back historically into different dates of the Check In/out screen.

Office: Let's you see all scheduled appointments for all offices. If you want to choose a certain office to view appointments, then you can click on the drop down list and select the appropriate office. Then it will show the appointments according to the criteria that you selected.

Doctors: If you scheduled by any doctor, it gives you the option of either selecting a specific doctor or all doctors and view all their scheduled appointments for the day.

Room: If you scheduled by any room, it will let you select all or a specific room to which you would want to view scheduled appointments.

Status: There are 5 options on how the middle panel of the screen will appear. You can either **All**, displays all patients checked-in regardless of status. **Checked-In**, only displayed status of Checked-in. **In Room** displays patients only in the room, **Checked-Out** displays only patients who have been checked out. **Ck**/**Room In** displays patient which have been checked-in and also those marked as In Room.
If you select **ALL**, user has ability of seeing everyone in the clinic.

At the end of the day, we recommend users confirm all patients have been marked as **Checked-Out.** This can be accomplished by changing the status to **Checked-In, In Room** and verify there are no patients listed in the middle panels.

Patient Search: Using the patient search filter, allows user to quickly check-in a patient. Example 60 patients are scheduled on that day, the patient comes in; instead of scrolling up and down in the left panel appointment screen, instead type in the patient's name, hit tab, the search screen is displayed, select the patient's name and hit ok. The system will ask if you wish to check the patient in. The Checked-In intake window appears and the user continues the regular steps.

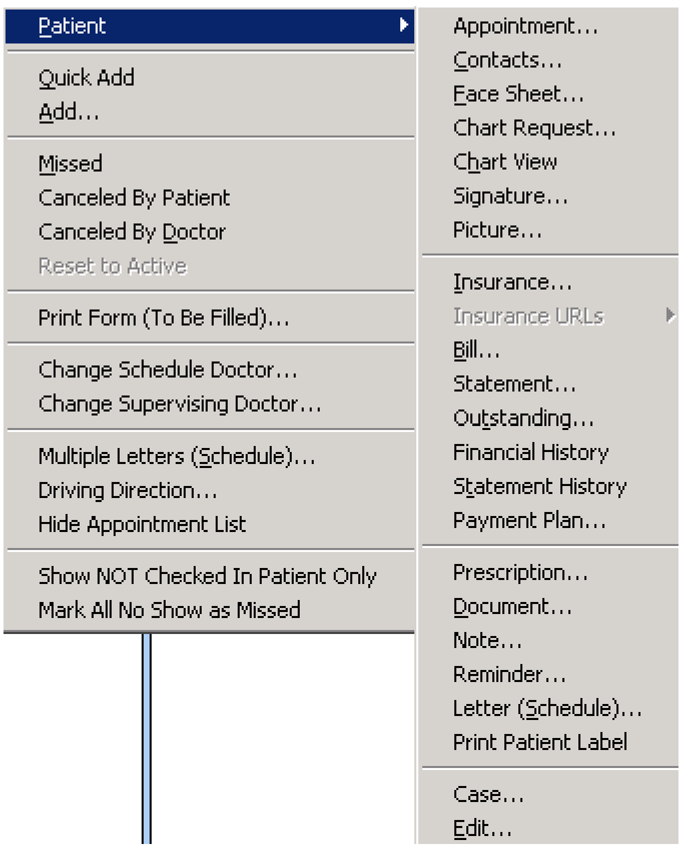
****

NOTES:

Left Panel

In the left panel of the Check In/out screen the user can view the appointment list, according to the criteria made with the Top Panel filters.

The appointments will appear in a light blue color, once the patient has been checked in the name will display in a light gray color.



By right clicking on a patient name in the **Left Panel,** this menu will display.
Patient – displays menu.
QuickAdd checks patient in bringing up quickly the check-in window.
Add – checks patient in also, however, user goes thru 2 screens to confirm information.
Missed allows user to mark patient missed
Canceled by patient/doctor – allows user to mark patient appointment as cancelled by patient or by doctor.
Print Form – allows user to print forms.
Change Scheduled/Supervising Doctor – allows user to change provider choices
Multiple Letters – allows user to print letter
Driving Direction – obtain driving directions via the internet
Hide Appointment List – allows user to remove Left Panel from view.
Show NOT Checked In Patient Only – narrows patients in list to only those not checked in yet.
Mark All No Show as Missed – allows user to quickly marked all those patients not checked in as "no show" and places an (M) next to patient name to denote Missed.

****

NOTES:

____

____

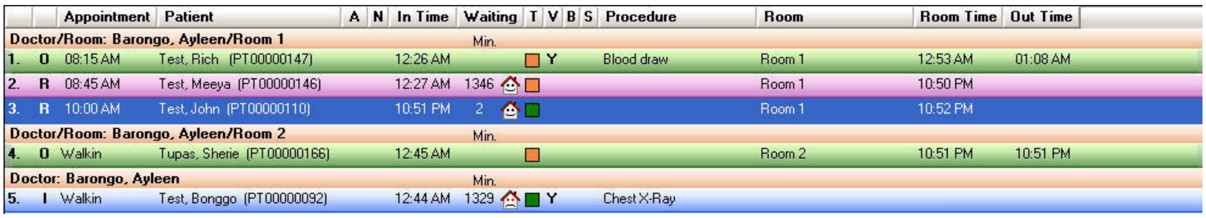
____

____

____

Middle Panel

The middle panel will display the patients that are in the clinic. Patient's status is shown in the same area.



		Appointment	Patient	A	N	In Time	Waiting	T	V	B	S	Procedure	Room	Room Time	Out Time
Doctor/Room: Barongo, Ayleen/Room 1							Min.								
1.	O	08:15 AM	Test, Rich (PT00000147)			12:26 AM			Y			Blood draw	Room 1	12:53 AM	01:08 AM
2.	R	08:45 AM	Test, Meeya (PT00000146)			12:27 AM	1346						Room 1	10:50 PM	
3.	R	10:00 AM	Test, John (PT00000110)			10:51 PM	2						Room 1	10:52 PM	
Doctor/Room: Barongo, Ayleen/Room 2							Min.								
4.	O	Walkin	Tupas, Sherie (PT00000166)			12:45 AM							Room 2	10:51 PM	10:51 PM
Doctor: Barongo, Ayleen							Min.								
5.	I	Walkin	Test, Bonggo (PT00000092)			12:44 AM	1329		Y			Chest X-Ray			

Once the patient is successfully checked in, the patient's information (the appointment time, name, authorization status, in time, waiting time, and others) will be displayed in the middle panel of the screen.

The bottom of the Middle Panel includes important information regarding the patients which have been checked into the clinic.

The middle panel also displays the following:
Status of the patient:

- I Checked In patient's
- R In Room patient's
- O Checked Out patient's

Authorization Status

- P Pending authorizations
- A Authorized
- D Denied authorizations

N: Note- indicates a note was entered at the time the user scheduled the patient.

T: indicates Visit Status – Displays either visit note icon or colorful boxes that will serve as a communication tool for the staff in the clinic. Similar to flags outside an examination door. Each box can have a different color, and each color will indicate the patient's status in the clinic.

****

NOTES:

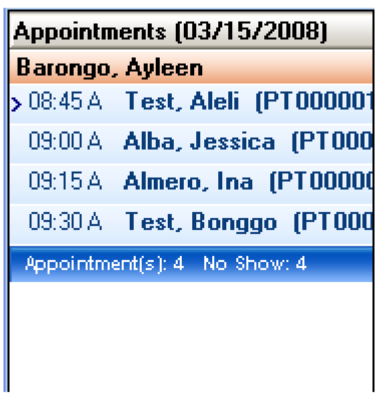
(Note: the visit status is setup from Setup >>> Visit Note >>> Other >>> Status, user defined definitions and colors)

V: Vitals – If the vitals have been entered for the patient a Y will be displayed. It there is nothing in the column, then no action has been taken.

B: Super Bill - If a super bill has been created again a Y will be displayed.

S: Sign Off - If the Visit Note has been signed off a Y will be displayed.

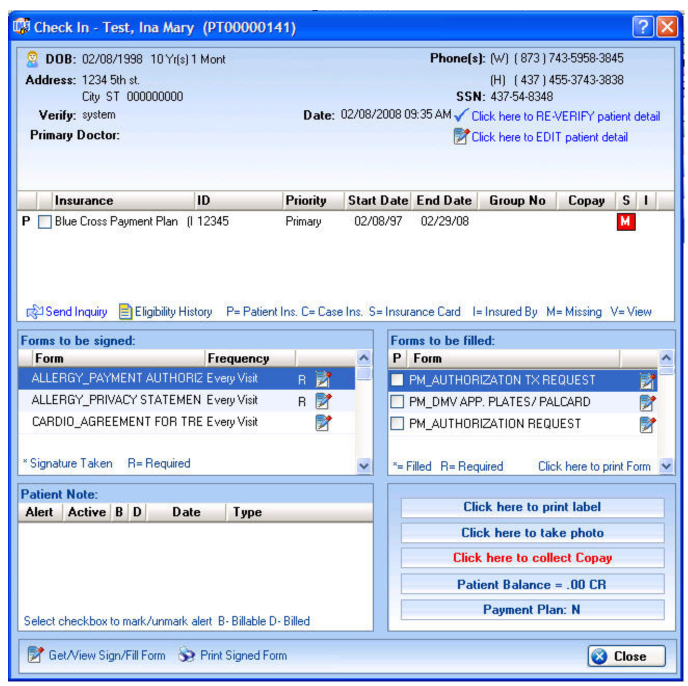
Checking in patient



To check in the patient from the left panel of the Check In/out screen the scheduled appointment list will be displayed. To check in a patient, select a patient and double click the patient's name from the appointment list.

When the patient is checked in, the check in screen will be displayed.

This screen allows the user to verify patient information. Edit if necessary, input insurance information, scan in insurance care, get signatures on forms. Alerts user to notes, Take photo, collect copay, etc.



****

NOTES:

____

____

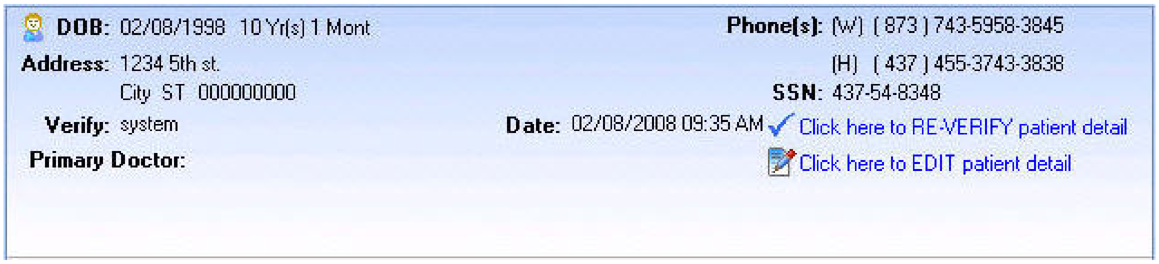
____

____

____

Verifying patient information

When checking in a patient, the user can verify all patient information. Once verified, the user information of who took this action, the date and time are now stamped on this patient file. Therefore it is very important that all users actually verify the information and not assume it is correct. Simply asking the patient can avoid claim rejection or a patient statement being sent to wrong address.



To edit the patient information click the EDIT patient detail text. The patient master screen will appear allowing user to make the necessary changes.

Insurance screen

To enter insurance information, simply double click in the window and add the insurance information. Note the V represents the insurance card was scanned in and can be Viewed. A red M indicates there is no scanned image of the insurance card. Clicking on the red M will cause the scan function to launch.

Forms to be filled and Forms to be signed

To access the form click on the paper icon, the form will display allowing user to have patient sign, view, print for patient, etc.

****

NOTES:

____

____

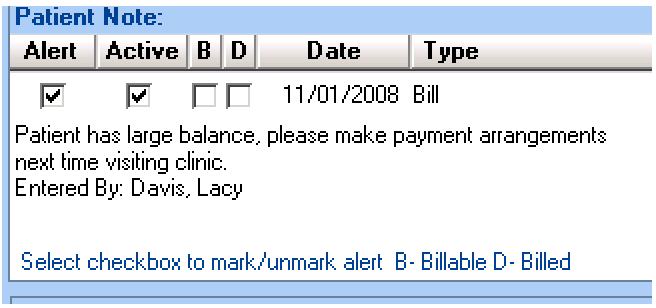
____

____

____

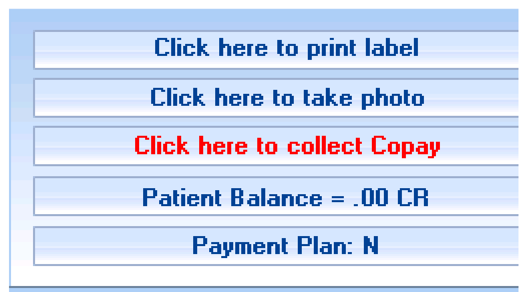
SuiteMed Beyond EMR

Patient notes and alerts window
Any notes linked to this patient which has been checked as an “alert” will display in this window. Health maintenance alerts will also display.



The bottom right section of the screen displays options the user may take such as:
taking the patient’s photo
printing a label
collecting copayment
viewing patient statement if patient has a balance
viewing payment plan

*****Clicking on the patient balance allows user to hand to patient a patient statement and collect any outstanding debt at the time of check in.*****

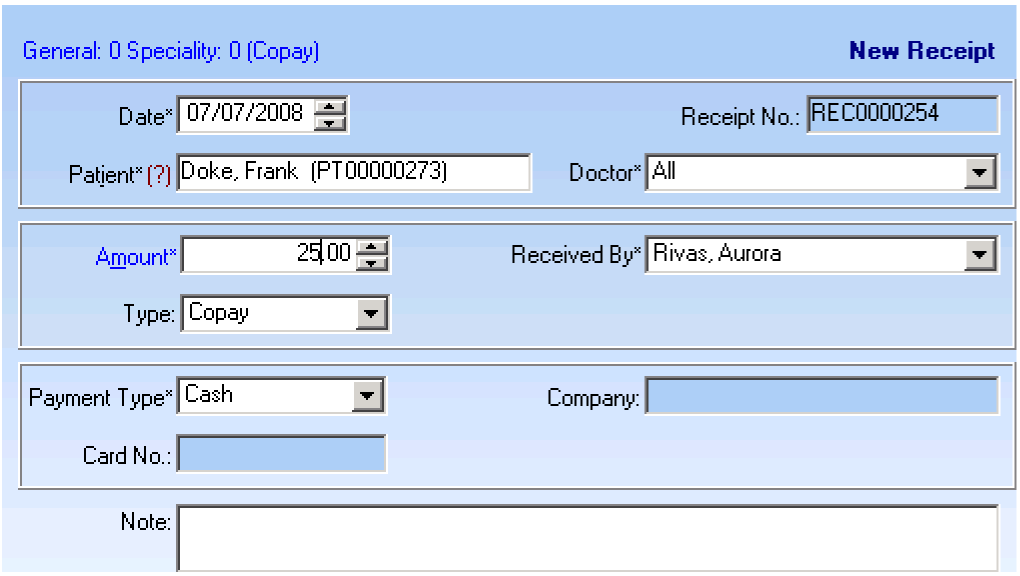


****

NOTES:

To collect a payment from the patient, click the red text as indicated to “click here to collect copay”. The payment window will display. The date, patient, doctor, received by will automatically populate the fields. The amount will auto popular IF the copayment amount has been defaulted in the patient insurance screen.

Input the payment amount, click to save, choose to print or not to print a receipt and Close the window.



Once user is finished, click to Close the Check in window.

After the patient is checked in if the patient photo was taken, the photo will display to the right. As each patient is selected (name highlighted in middle check in window) the patient photo will display.

****

NOTES:

____

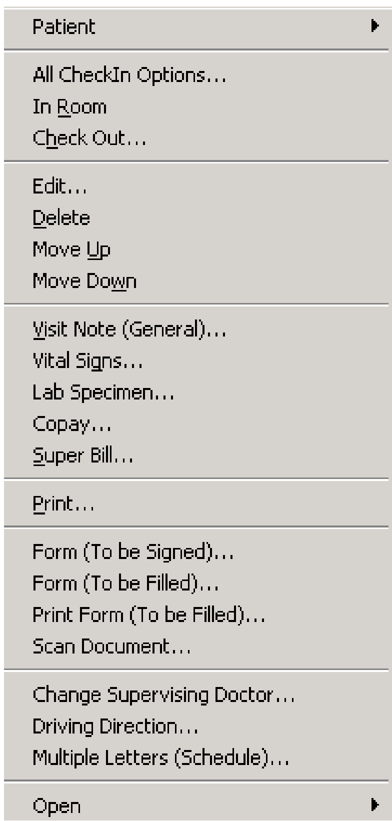
____

____

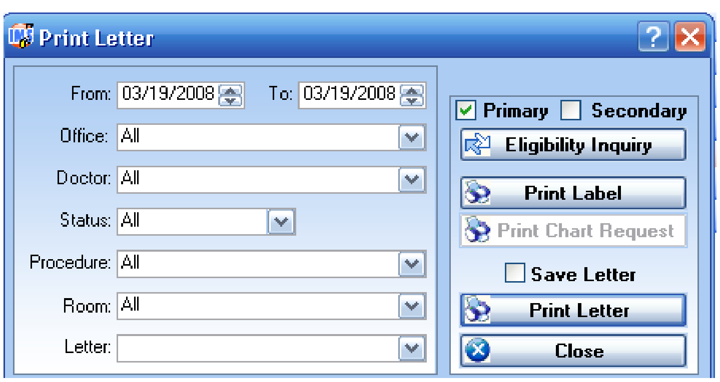
____

____

By right clicking on any patient in the Middle Panel, the user will see the following menu box.



By choosing **Patient**, the same options appear thru out the program to view information pertinent to that patient.
All CheckIn Options opens the Check-in window allowing user to view insurance, alerts, forms to be filled and signed, collect copay, etc.
In Room allows user to place patient in room.
Check Out allows user to check out patient
Edit allows user to edit information in Check-in window
Delete allows user to delete the patient from the Check-In window, however, this does not delete the patient from the Left Panel/schedule.
Move Up/**Down** allows user to move the Checked In patient up or down the list.
Visit Note/**Vitals** opens the visit not to enter information.
Lab Specimen allows user to denote collection of specimen.
Copay allows user to collect copay
Superbill allows user to enter superbill for this visit
Print allows user to print all documentation linked to this patient
Forms Signed/**Filled** allows user to bring up forms to be filled or signed for patient and **Print Forms**
Scan Document allows user to scan in documents such as Driver's License and link to patient, or scan in forms the patient has brought in with this for this visit. It is important to link to correct category.
Change Supervising Doctor allows user to change provider linked to the schedule for this patient, especially useful if provider is not available.



Driving Direction allows user to obtain via the internet driving directions from patient home to office.
Multiple Letters allows user to select a letter to be printed and handed to patient(s) based on filters as displayed.
Open allows user to open patient **Case, Visit Note, Prescription**.

By clicking the Option tab the same menu above will appear.
****

NOTES:

____

____

____

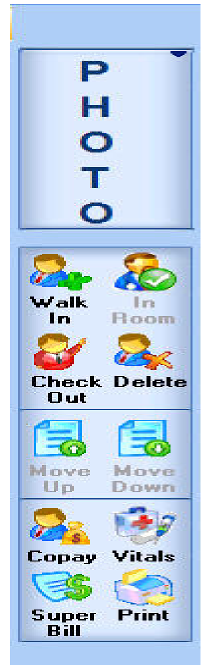
____

____

Right Panel

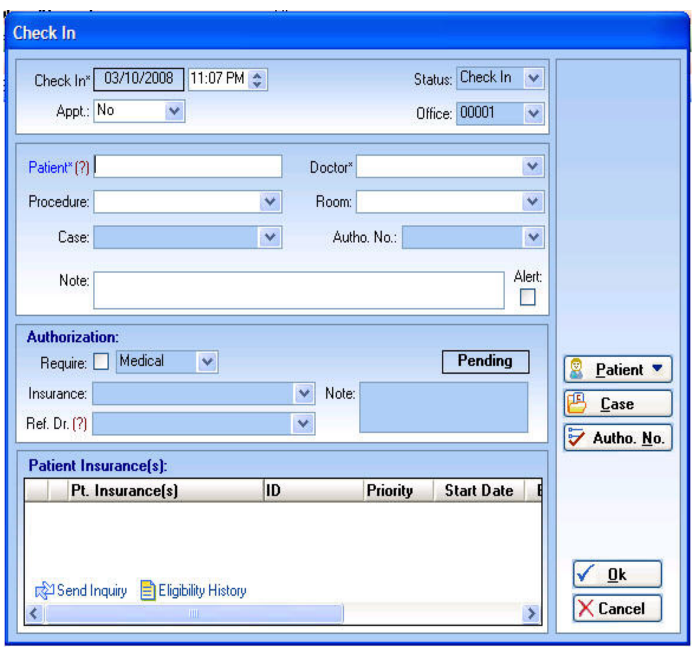
Photo

The highlighted patient photo will display in the photo box if taken.



Checking in a walk in-patient

Users can check in a patient without an appointment schedule (a walk-in). Click on the “walk in” icon; input the patient name, the physician to see the patient, procedure (reason for visit)…..all much like before with a scheduled patient. Once finished click “ok”, and the All check In options screen will be displayed. Make any necessary changes in the patient's demographic, insurance details, and others. Save and close.



****

NOTES:

____

____

____

____

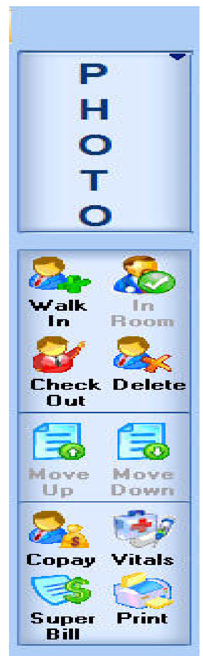
____

In Room

To place the patient in a room, highlight the patient, click In Room from the right panel and select the room.   Note: Rooms are setup in Setup >>> Scheduler >>> Rooms

Check Out

To check out a patient, highlight the patient, click Check Out. The Check Out window will display with any charges, items which need to be printed such as Prescription, Lab Orders, Patient Careplans, etc



Delete

Allows user to highlight a patient who has perhaps been incorrectly check-in and delete from the check-in window. This does not delete the patient from the patient master or scheduler , it only removes the patient from the Middle Panel for checked in patients.

Move Up / Move Down

Allows user to move one patient up or down in the check-in screen view.

****

NOTES:

____

____

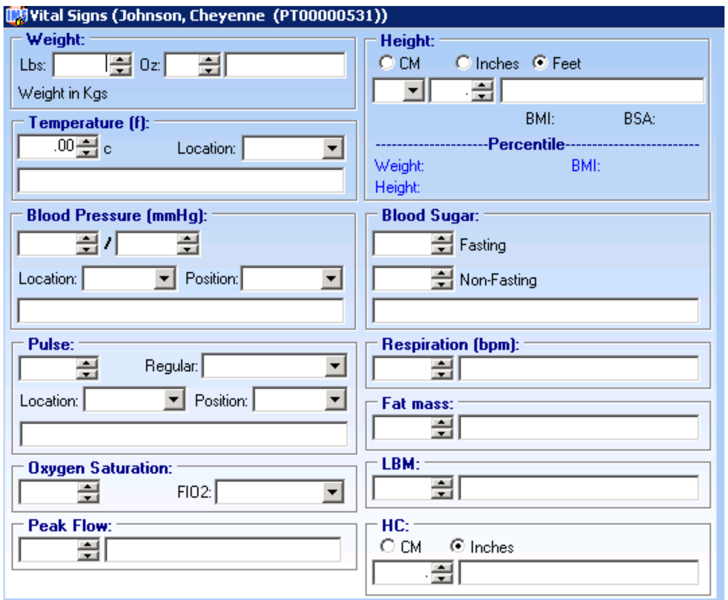
____

____

____

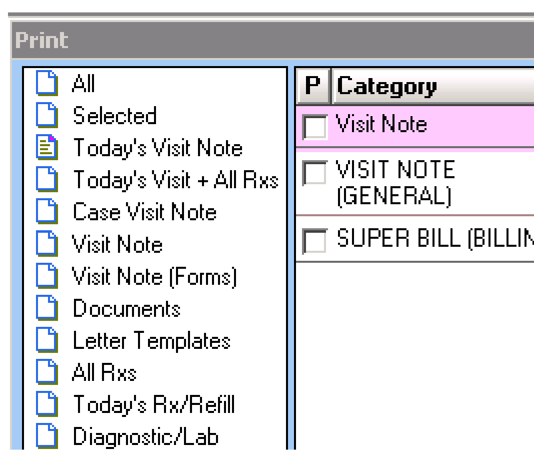
Copay
User can enter copayment by clicking on the copayment icon. This is very useful if the user did not collect the copayment when checking in the patient using the copayment feature.

Vitals
The highlighted patient vitals can be recorded from the check-in screen as well as in the visit note.



Superbill
An electronic superbill / fee ticket can be generated in lieu of a paper superbill by highlighting the desired patient, clicking the superbill icon and recording the CPT and ICD9 codes.
The Superbill area is important for billing.

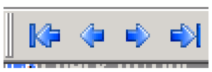
Print
The Print window appears with all documents related to the highlighted patient. From this window the user can print Rx, visit notes, letters, superbills, etc. Note the available items in the left panel window. Simply place a check in the box and print.

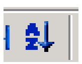


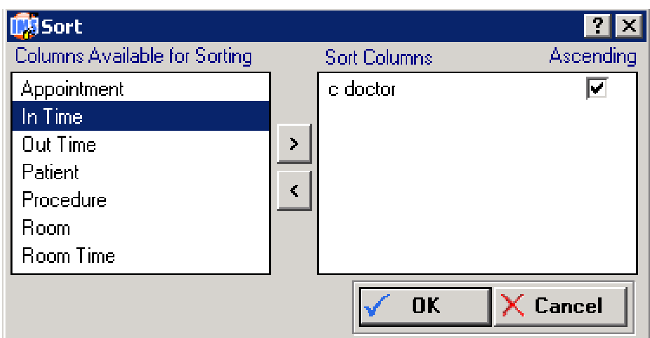
****

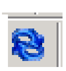
NOTES:

The panel above the Check-In window allows users the following: 

 Moving up and down in the patient list

 Allows user to soft by the options displayed in the Sort window as shown below.



 Refreshes screen view

 Providers use with a Daily Deposit Report based only on payments input from Check-In screen.

****

NOTES:

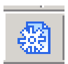
____

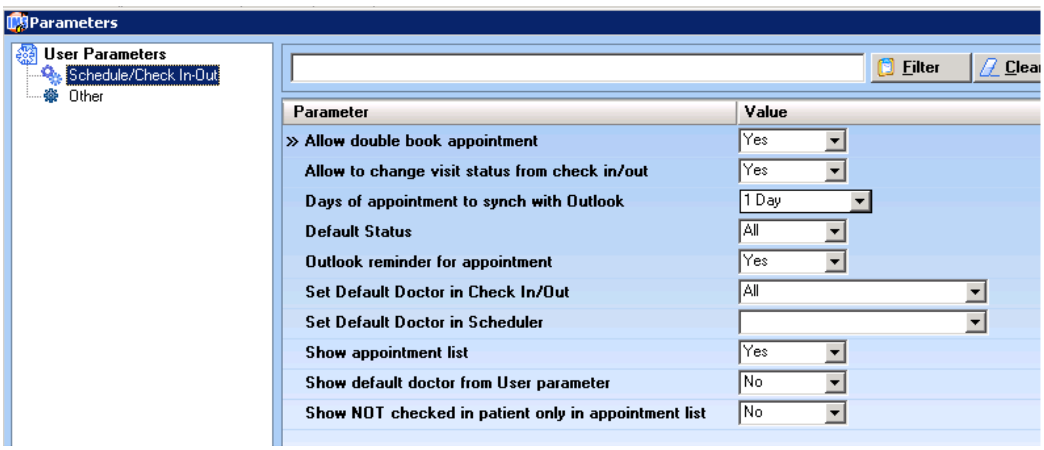
____

____

____

____

 Opens the Parameter window as displayed below.



****

NOTES:

____

____

____

____

____

SuiteMed
Beyond EMR

Tips:

USER Parameter Settings include

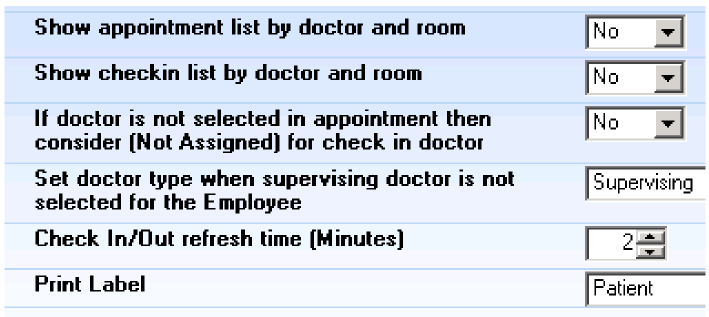
Parameter	Value
» Allow double book appointment	Yes
Allow to change visit status from check in/out	Yes
Days of appointment to synch with Outlook	1 Day
Default Status	All
Outlook reminder for appointment	Yes
Set Default Doctor in Check In/Out	All
Set Default Doctor in Scheduler	
Show appointment list	Yes
Show default doctor from User parameter	No
Show NOT checked in patient only in appointment list	No

SYSTEM Parameter Settings include

Parameter	Value
» Patient check in doctor is different than schedule doctor	No
Select Room when clicking <In Room>	Yes
Alert for referral doctor during checkin	No
Ask for patient picture?	No
Show different color for all incompleted tasks in check out	Yes
Chart request letter	
Print first visit of case when patient checks in	No
Print last _ visit(s) of case when patient checks in	
Default document category for scan	
Show patient picture	Yes
Add visit when send patient in room	Ask
Allow to open visit note if patient is not in room	Yes
Use visit note doctor signature when print/fax Rx from check out	Yes
Show superbill when check out	Do not show

****

NOTES:



Show appointment list by doctor and room	No
Show checkin list by doctor and room	No
If doctor is not selected in appointment then consider (Not Assigned) for check in doctor	No
Set doctor type when supervising doctor is not selected for the Employee	Supervising
Check In/Out refresh time (Minutes)	2
Print Label	Patient

****

NOTES: