

# Patient Check-In Process

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Patients can use healow CHECK-IN to check in for appointments, update demographic information, verify medical history, sign consent forms, complete questionnaires, verify insurance information, pay for services, and announce their arrival. healow CHECK-IN walks patients through the check-in and registration process, step-by-step.

The following topics are covered in the Patient Check-In Process chapter:

- [Check-In for Appointments](#)
- [Verify Patient Demographics](#)
- [Verify Insurance](#)
- [Acknowledge Consent Forms](#)
- [Verify Medical History](#)
- [Complete Questionnaires](#)
- [Payment Options](#)
- [Check-In Complete](#)
- [Arrival Announcement](#)
- [Additional healow CHECK-IN Methods](#)

## Check-In for Appointments

Patients can use healow CHECK-IN to check in for appointments using the mobile web app (SMS), healow app, healow.com, or the Patient Portal.

### Check-In Using the Mobile Web App (SMS)

**Note:** This section describes the check-in process using the mobile web app.

For information about additional check-in options, refer to the following sections:

- [Check-In Using the healow App](#)
- [Check-In Using the Patient Portal](#)
- [Check-In from healow.com](#)

The healow CHECK-IN mobile web app enables patients to check in for appointments using a web-based application, compatible with most mobile web browsers. No installation is necessary.

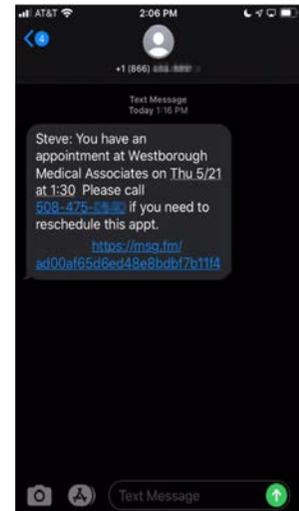
The steps involved in checking-in using the Mobile Web App (SMS) are as follows:

- [Step 1: SMS Appointment Reminder](#)
- [Step 2: Confirm Appointment](#)
- [Step 3: Begin Check-In](#)
- [Step 4: Authentication](#)

## Step 1: SMS Appointment Reminder

Text-enabled patients receive an SMS appointment reminder before their appointment. The message contains a secure link to the healow CHECK-IN mobile web app, where patients can update demographic information, verify medical history, sign consent forms, complete questionnaires, verify insurance information, pay for services, and announce their arrival.

The patient taps the link in the SMS message to launch the healow CHECK-IN mobile web app in a browser.



## Step 2: Confirm Appointment

After the patient taps the link in the SMS message, the healow CHECK-IN mobile web app opens in a browser, displaying the appointment details, and the confirmation options.

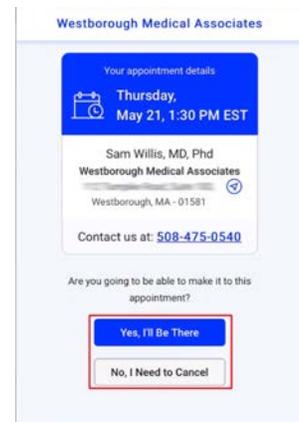
For more information about setting up Messenger, refer to the *eClinicalMessenger User Guide* available from the [my.eclinicalworks.com](http://my.eclinicalworks.com) Customer Portal.

The appointment confirmation options are as follows:

- **Yes, I'll Be There** - The patient taps this button to confirm that they intend to keep the appointment as scheduled.
- **No, I need to Cancel** - The patient taps this button to alert the practice that they wish to cancel the appointment. The Visit Status is updated, and the check-in process ends.

Additional features on the Appointment Confirmation window are as follows:

- **Calendar** - The patient taps the calendar icon to add this appointment to the calendar on the mobile device.
- **Map** - The patient taps the location service icon to open the facility address in a mobile map application.
- **Contact Us** - The patient taps the telephone number to call the practice.



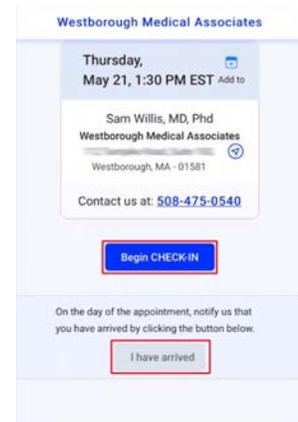
### Step 3: Begin Check-In

Tapping *Yes, I'll Be There* on the Appointment Confirmation window begins the check-in and arrival notification process.

The check-in and arrival options are as follows:

- **Begin CHECK-IN** - The patient taps *CHECK-IN* to start the check-in process.
- **I Have Arrived** - The patient taps the *I Have Arrived* button to notify the practice that they have arrived at the facility for their scheduled appointment. On the day of the appointment, the patient taps the link from the original SMS appointment reminder to return to the Check-in window.

**Note:** The *I Have Arrived* option is active only on the day of the appointment.



### Step 4: Authentication

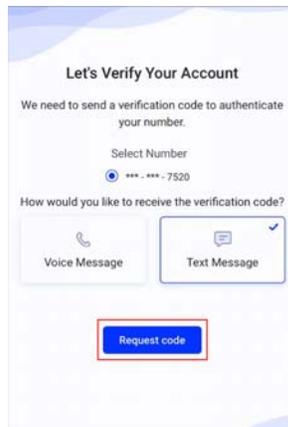
Tapping *Begin CHECK-IN* on the Appointment Confirmation window opens the DOB authentication window. The patient enters the date of birth, then taps *Start CHECK-IN*:

After the patient's date of birth is verified, the Phone Authentication window opens.

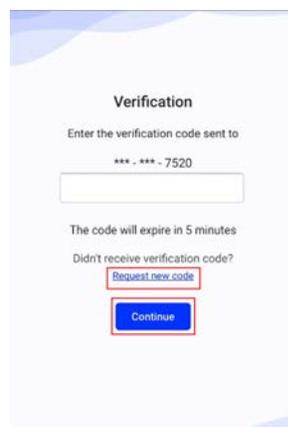
#### To authenticate by phone:

1. The patient selects a registered mobile number.
2. The patient taps one of the following options:
  - ◆ **Voice Message** - The patient receives a verification code through an automated telephone call.
  - ◆ **Text Message** - The patient receives a verification code through a text message.

3. The patient taps *Request Code* to initiate the call or text message:



4. After the verification number is received, the patient enters that number into the field provided, then taps *Continue*:



**Note:** If no code is received, the patient taps *Request new code* to initiate another request.

The Patient Information section displays. For more information, refer to [Verify Patient Demographics](#).

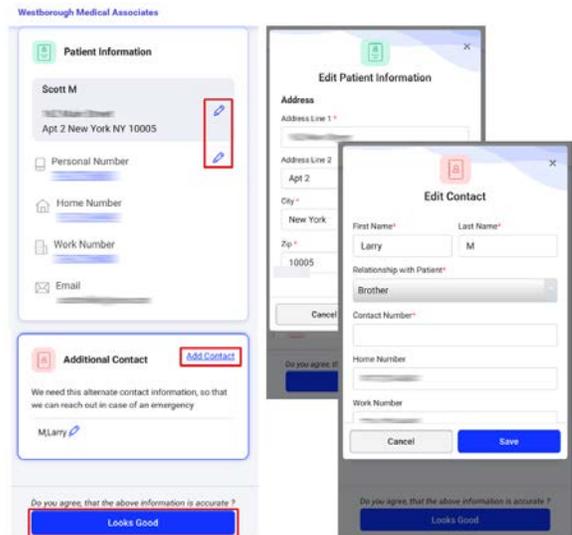
# Verify Patient Demographics

In the **Patient Information** section, the patient taps the pencil icons to add or edit information, if necessary.

In the **Additional Contacts** section, the patient taps the pencil icons to edit an existing contact and taps *Add Contact* to create a new contact, as necessary.

The patient verifies the information and taps *Looks Good* to save and continue.

The Insurance section displays for user review. For more information, refer to [Verify Insurance](#).



# Verify Insurance

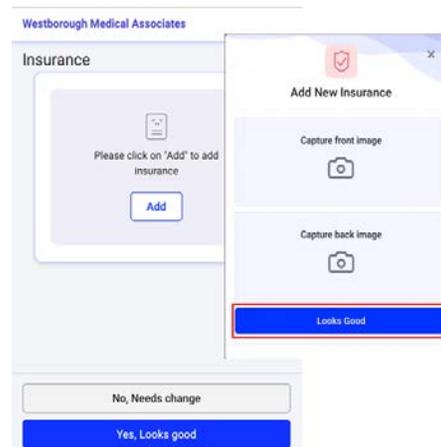
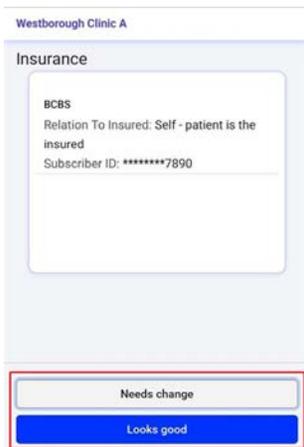
If an insurance is already associated with a patient, the details will display. The patient reviews the insurance information, then selects one of the following options:

- **No, needs to change** - The Add New Insurance window opens, where a photo of the front and back of the insurance card can be captured and uploaded.
- **Yes, Looks good** - The patient verifies the information is accurate, then advances to the next window:

If no insurance is associated with a patient, an image of the insurance card (front and back) can be captured and uploaded to the practice.

**To add an insurance:**

1. The patient taps *Add* on the Insurance window.
2. The patient captures images of the front and back of their insurance card on the Add New Insurance window.
3. The patient taps *Looks good* to save and submit the images:



The Consent Forms section displays for the user’s acknowledgment. For more information, refer to [Acknowledge Consent Forms](#).

## Acknowledge Consent Forms

The patient reads and acknowledges each consent form, then taps *Accept*. The patient must accept all consent forms before continuing and completing the check-in process:

Westborough Medical Associates

**Consents**

**Consent Form**

I hereby give my consent for Westborough Medical Associates to use and disclose protected health information (PHI) about me to carry out treatment, payment and healthcare operations (TPO). Westborough Medical Associates Notice of Privacy Practices provides a more complete description of such uses and disclosure.

I have the right to review the Notice of Privacy Practices prior to signing this consent. Westborough Medical Associates reserves the right to revise its Notice of Privacy Practices at any time. A copy of the Notice of Privacy Practices may be obtained at the front desk, or by forwarding

Accept

The Allergies section displays for the patient’s verification. For more information, refer to [Verify Medical History](#).

## Verify Medical History

The patient reviews the allergies, medications, hospitalizations, and surgical history, then taps *Next* to verify that the information is accurate and complete. If any information needs to be added, removed, or modified, patient enters comments to that effect, then taps *Next*:

Westborough Clinic A

Please review and comment if any changes are required in your allergy list below

**Allergies**

| Name       | Reaction |
|------------|----------|
| Cat Dander |          |

Add your comment

Next

Westborough Clinic A

**Medications**

Please review and comment if any changes are required in your medication(s) listed below

Advil 200 MG 1 tablet with food or milk as needed Orally Three times a day

Lisinopril 40 MG 1 tablet Orally Once a day

Add your comment

Next

Westborough Clinic A

Please review and comment if any changes are required in your hospitalization(s) listed below

**Hospitalizations**

| Reason       | Date |
|--------------|------|
| Ankle sprain | 2011 |

Add your comment

Next

Westborough Clinic A

Please review and comment if any changes are required in your surgical history listed below

**Surgical History**

| Reason | Date |
|--------|------|
| ACL    | 2011 |

Add your comment

Next

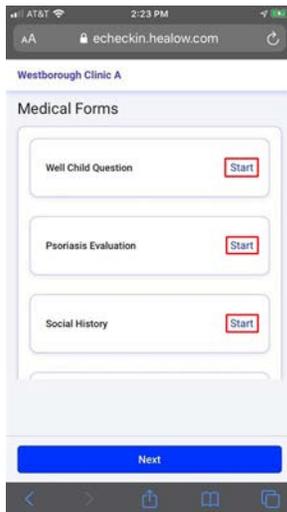
The Medical Forms section displays for the user to fill out the questionnaires. For more information, refer to [Complete Questionnaires](#).

# Complete Questionnaires

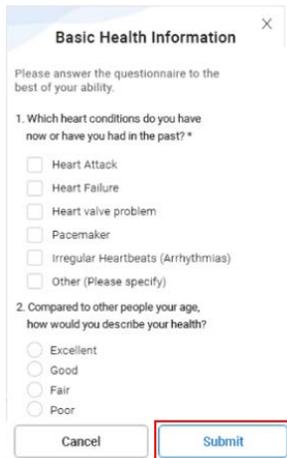
Questionnaires are interactive forms used to collect patient information before an appointment. All Questionnaires requiring patient input display on the Medical Forms window.

## To complete questionnaires:

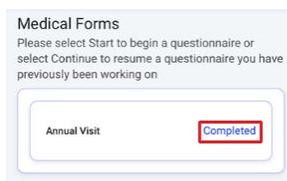
1. The patient taps *Start* on each questionnaire to open that form:



2. The patient answers the questions, and then taps *Submit* when completed:



After submitted forms are accepted, the Start status indicator changes to Complete:



3. The patient opens and completes any additional questionnaires.
4. Th patient taps *Next* after all questionnaires are completed.

**Note:** All Questionnaires must be submitted before continuing the check-in process.

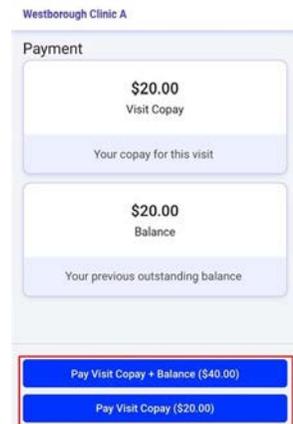
The Payment section displays, if applicable. For more information, refer to [Payment Options](#).

## Payment Options

If applicable to the current appointment, the patients have options to pay their co-pay and any outstanding balances. Depending on the [healow Payment Services](#) configuration, these payments may be required before the patient can complete the check-in process:

### To make patient payments:

1. The patient taps either *Copay* or *Balance*.
2. The patient enters payment information in the healow Payment Services window.
3. (Optional) If permitted, the patient taps *Pay Later* to bypass the Payment window and continue the check-in process. The Check-In Complete section displays. For more information, refer to [Check-In Complete](#).



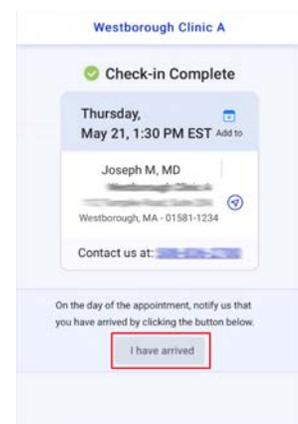
## Check-In Complete

After all the steps, in the check-in process have been completed, the Check-in Complete window opens, displaying appointment details and the confirmation message, *Check-in Complete*.

The *I Have Arrived* button is also enabled for the patient to inform the practice about the arrival. For more information, refer to [Arrival Announcement](#).

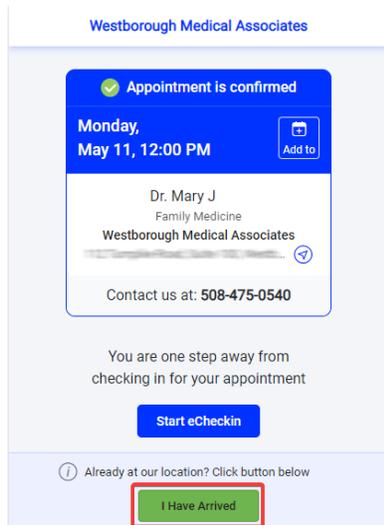
Additional features on the Check-In Complete window include:

- **Calendar** - The patient taps the calendar icon to add this appointment to a calendar on the mobile device.
- **Map** - The patient taps the location service icon to open the facility address in a mobile map application.
- **Contact Us** - The patient taps the telephone number to call the practice.



## Arrival Announcement

On the day of the appointment, the patient taps the *I Have Arrived* button (from the original SMS appointment reminder message) to notify the practice that they have arrived at the facility for their scheduled appointment:



**Note:** The *I Have Arrived* button is active only on the day of the appointment.

## Additional healow CHECK-IN Methods

In addition to the SMS method, patients can use healow CHECK-IN to check in for their appointments using the following methods:

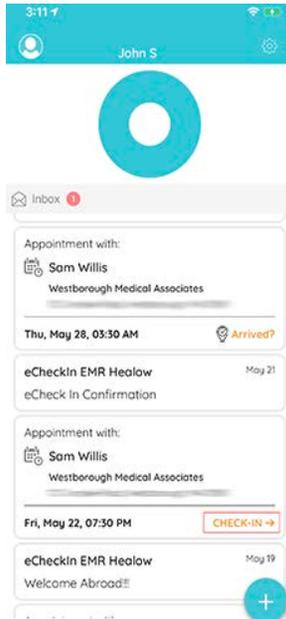
- Check-In Using the healow App
- Check-In Using the Patient Portal
- Check-In from healow.com

## Check-In Using the healow App

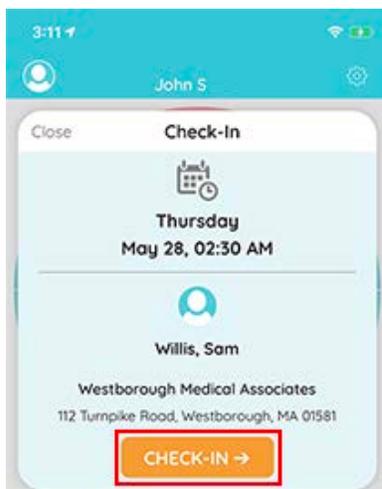
The patient can check in for an appointment using healow CHECK-IN from the healow mobile app.

### To check-in from the healow app:

1. The patient taps *CHECK-IN* next to the appointment details:



2. From the Check-In window, the patient taps *Check-In*:

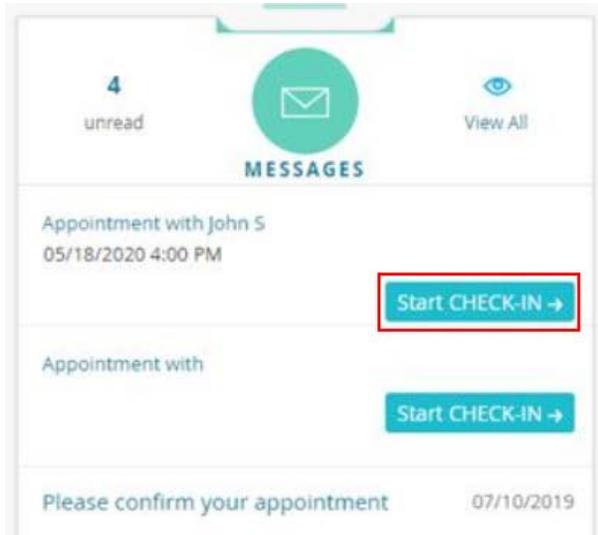


The Patient Information section displays for the user's review. Patient completes the check-in process, performing the following steps:

1. Verify Patient Demographics
2. Verify Insurance
3. Acknowledge Consent Forms
4. Verify Medical History
5. Complete Questionnaires
6. Payment Options
7. Check-In Complete
8. Arrival Announcement

## Check-In Using the Patient Portal

The patient can check in for an appointment using healow CHECK-IN from the Patient Portal. The patient taps the *Start CHECK-IN* button on the Message panel of the Patient Portal Dashboard:



The Patient Information section displays for the user's review. Patient completes the check-in process, performing the following steps:

1. Verify Patient Demographics
2. Verify Insurance
3. Acknowledge Consent Forms
4. Verify Medical History
5. Complete Questionnaires
6. Payment Options
7. Check-In Complete
8. Arrival Announcement

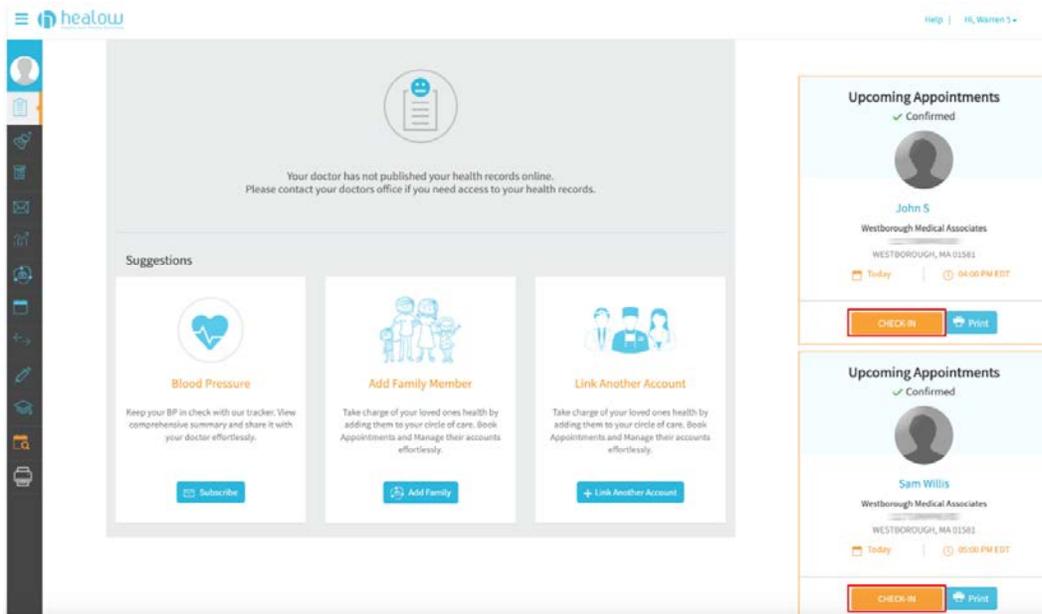
## Check-In from healow.com

When an appointment reminder text is sent to a patient, a message is also sent to that patient on healow.com.

The patient can check in to their appointment on healow.com either from the Upcoming Appointments Panel or by clicking the appointment reminder message.

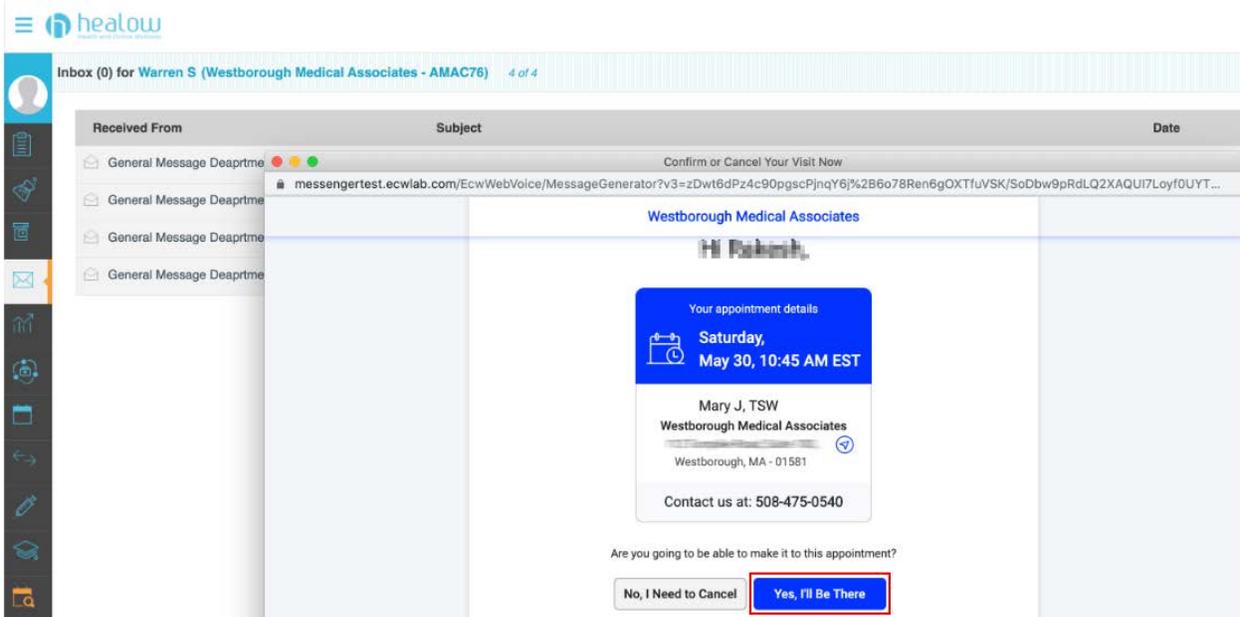
To check in from healow.com:

The patient clicks *Check-In* on the Upcoming Appointments Panel:



OR

From the Message band, the patient clicks *Inbox*, then selects a message to open the appointment details. The patient then clicks the *Yes, I'll Be There* button:



The Patient Information section displays for the user's review. Patient completes the check-in process, performing the following steps:

1. Verify Patient Demographics
2. Verify Insurance
5. Complete Questionnaires
6. Payment Options

3. Acknowledge Consent Forms
4. Verify Medical History
7. Check-In Complete
8. Arrival Announcement