

Checking In a Patient

Notes:

- All Scheduled patients must be checked in using the Action Manager.
- After completing each task, remember to **GO FORWARD**.

Remember To Do Checklist:

- Verify Patient Information including patient name, address, marital status, etc.
- Verify Contact Information including phone number and email address.

(If the patient no longer has a land line and uses his/her cell phone for their primary contact, then put the patient's cell phone number as their Home number.)

- Verify and assign a Provider
- Link family members, if necessary.
- Verify primary, secondary and other insurance plan
- Scan insurance medical card, if necessary
- Verify insured on policy and change, if necessary
- Change relationship of patient to insured, if necessary
- Confirm all insurance coverages