# Front Desk
# Patient Check In using ActionManager

When a patient arrives for their scheduled appointment, greet the patient and click on the patient's clipboard icon in the ActionManager.

Have patient complete new patient or appointment forms and ask for the patient's insurance card and driver's license, if necessary.

## Patient Record

1. Confirm / Update Patient Information (address, birth date, martial status, sex, etc.)
2. Confirm / Update Contact Information (phone number, email address, etc.)

   *(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.)*
3. Assign Responsible Provider
4. Link Family, Guarantor and Employer (if applicable)
5. **Click the Go Forward Arrow**

## Primary Insurance

1. Confirm / Update Primary, Secondary and Other Insurance Information
2. Enter Insurance plan addresses, if necessary
3. Enter Insured's Information *(Important: Remember to Clear Insured)*
4. Enter Policy Number in ID field of Insured and Group Number
5. Select relationship of patient to insured
6. Enter Prior Authorization for VSP #'s and Spectera K #'s
7. Confirm Signature on File (Patient Claim Information)
8. Scan insurance card and drivers license (if necessary)
9. Copy insurance card and drivers license (if necessary)
10. **Click the Go Forward Arrow**

**All Scheduled patients must be checked in using the ActionManager™.**

**After completing each action, remember to GO FORWARD.**