OnPatient Onboarding/Check-In Overview

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Patients can use the OnPatient portal to check in for their appointment before visiting your office. Your patients can onboard/check in through the OnPatient website or iOS application and have all their information saved in DrChrono.

Within DrChrono, you can customize what the patient sees and enters in the form. The sections described here are the default sections included with your DrChrono account. Each section can be reordered or removed based on your needs.

The information obtained through OnPatient check-in is stored in the patient's chart or their clinical visit.

Patient Chart Information

The following sections populate information into the patient's chart:
- Profile Photo
- Name & Gender
- Address
- Background Information
- Contact Information
- More Information (Custom Demographics)
- Emergency Contact
- Primary Insurance
- Secondary Insurance
- Insurance Photo
- Consent Forms

Patients can use these sections to enter all their basic check-in information: name, gender, date of birth, social security, language, race, ethnicity, contact information, address, etc.

Contact Information

Email Address

sample@sample.com

Home Phone

(844) 569-8628

Cell Phone

(650) 555-5555

Work Phone

(650) 555-5555

More Information

What is your preferred pharmacy

DL Number

Driver's License

Employer

Employer info

Emergency Contact

Name

Edward Harris

Relation

Husband

Phone

(844) 569-8628

Primary Insurance

Primary Insurance Company

Cigna

Plan Name

Test Plan

Insurance ID Number

1234567890

Group Number

12345678

Patient Student Status

Not a Student

☑ Are you the insurance subscriber?

Secondary Insurance

Secondary Insurance Company

Plan Name

Insurance ID Number

Group Number

Patient Student Status

Not a Student

☑ Are you the insurance subscriber?

Once entered and saved, the data appears in the patient's chart under the **Important**, **Demographics,** and **Insurances** tabs.

Consent Forms

Patients can read and sign consent forms through OnPatient. After being signed, consent forms are stored in the chart under **Documents** > **Signed Consent Forms** tab.

Clinical Note Information

The **Additional Information** and **Reasons for Visit** sections are customizable sections, and you may add any fields you wish using the DrChrono EHR Form Builder. Any short text fields, single/multi checkboxes, toggle switches, selection boxes, and fraction fields can be added here. A sample template is shown below.

Additional Information

Where did you find us?

[⌄]

Which specialists do you see?

```
Chiropractor
Acupuncturist
Allergist
Massage therapist
```

Hold the Shift or Control key to select multiple options (Command key on Mac)

Who referred you?

[   ]

☐ Do you use online scheduling?

☐ Want access to online portal?

Anything special we need to know

[   ]

Reasons For Visit

☐ Allergies	☐ Annual Physical Exam
☐ Anxious	☐ Asthma
☐ Attention Problems	☐ Back Problems
☐ Broken/ Fractured Bones	☐ Cold
☐ Cough	☐ Depression
☐ Dizzy	☐ Earache
☐ Diabetes	☐ Diarrhea
☐ Facial Questions	☐ Heartburn
☐ Headache	☐ Weekly Recur Exam

Select **Clinical** > **Clinical Form Management** and search the form to edit from forms list.

Allergies, Medications, Conditions, and Questions and Comments

Patients can verify their medications, allergies, and conditions and document any changes. They can also note questions or comments for the provider.

> ℹ️ Changes made by a patient do not automatically update to their chart. A provider or staff member must manually enter the updated information into the patient's chart

Changes to Allergies

Allergy	Reaction
Non-Drug Allergy: Cats	Shortness of breath/difficulty breathing
Non-Drug Allergy: Milk	Hives
penicillin	Hives
d00170 aspirin	Hives

Changes to allergies

Changes to Medications

Medication & Dosage	Indication
Mirena 52 mg intrauterine device	
Flonase 50 mcg/inh nasal spray	
Cranberry oral capsule	
12 Hour Nasal	
ZyrTEC 5 mg oral tablet, chewable	
amoxicillin 500 mg oral tablet	
Azithromycin 5 Day Dose Pack 250 mg oral tablet	

Changes to medications

Changes to Medical Conditions

Problem	Code	Status	Diagnosed
Chronic urinary tract infection (disorder)	N39.0	active	07/25/2018
Idiopathic scoliosis AND/OR kyphoscoliosis (disorder)	M41.20	active	07/25/2018
Multiple environmental allergies (disorder)	T78.49XA	active	07/25/2018

Changes to medical conditions

Questions & Comments

Question or Comment #1

Question or Comment #2

Question or Comment #3

Once entered and saved, the information can be found in the clinical note under the **OnPatient/Check-In** form. Providers can discuss the responses with the patient and make adjustments or notes in the chart or note.

When everything has been completed, the patient selects **I'm done** and has all the information in this form uploaded to DrChrono and populated into their patient account or clinical note.