OnPatient Onboarding/Check-In Overview

09/06/2024 5:07 pm EDT

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.

Onboarding forms

Patient Photo

📷 Webcam   ⬆ Upload

Choose a file:

[Choose File] No file chosen

[Upload]   [Cancel]

Name & Gender

First Name
Jenny

Middle Name

Last Name
Harris

Suffix

Gender
Female ⌄

Nickname
Jen

Address

Street Address
1001 N Rengstorff Ave

City
Mountain View

State
California ⌄

Zip Code
94040

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.

+ Add new patient
Demographics
Appointments
Clinical Dashboard
Documents
Eligibility
Tasks · 0
Problem List · 5
Medication List · 14
Send eRx
Allergy List · 4
Drug Interactions · 2
CQMs
Intake Data

Jenny (Jen) Harris (Female | 42 years old | Feb. 11, 1980)

Phone: (443) 555-5555   **Email:** sample@sample.com

Address: 1001 N Rengstorff Ave
Mountain View , CA 94040

CDS: Adult Immunization Schedule Age: 27-49

Las
Nex

Primary Provider: Dr. James Smith

[New Referral] [Fax Demographics] [🖨 Print Demographics]

| Important | Demographics | Insurances | Authorizations | Smoking Status | Flags | Balan |

✓ Sufficient patient demographics to bill insurance.   🚩 **Fall Risk**   🚩 **Gestational Diabetes**   🚩

Important Information

Primary Provider	Dr. James Smith ⌄	
Status	Active ⌄	
Title	Mrs	e.g. Mr, Mrs, Ms
First Name	Jenny	
Nick Name	Jen	

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**.

Consent & Signature

	2 unread consent forms	
☐	No Show Policy	Required
☐	HIPAA Data Use Agreement	Required

+ Add new patient

- Demographics
- Appointments
- Clinical Dashboard
- **Documents**
- Tasks ②
- Problem List ⑬
- Medication List ⑦
- Send eRx
- Allergy List ④
- Drug Interactions ①
- CQMs

←

Jenny (Jen) Harris (Female | 40 years old | Feb. 11, 1980) ✎   HAJE000001

Phone: (650)-555-5555   **Email:** sample@sample.com   **Date Added:** Aug. 13, 2020
Address: 1001 N Rengstorff Ave   **Last Scheduled Appt:** Tue Sep 29, 2020
Mountain View , CA 94040   **Next Scheduled Appt:** Wed Sep 30, 2020
CDS: Adult Immunization Schedule Age: 27-49

☑ onpatient access enabled | New Referral | Fax Demographics | 🖨 Print Demographics   ♥ Vitals | + Schedule New Appointment

Upload images, scanned paper documents, or PDFs downloaded from other electronic medical records.

Uploaded Documents   Locked Clinical Notes   **Signed Consent Forms**   Outbound Referrals   Lab Results   Amendments

Signed Consent Forms

Consent Form	Date of Appointment	Date of Signature	Actions		
No Show Policy	Sep 04, 2020 1:30 p.m.	Sep 04, 2020 11:14 a.m.	Fax Consent Form	Fax Signature	Retract from onpatient
HIPAA Data Use Agreement	Sep 04, 2020 1:30 p.m.	Sep 04, 2020 11:14 a.m.	Fax Consent Form	Fax Signature	⇄ Send to onpatient

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** > **Form Builder** and select the form to edit under the preset form list to edit these sections.

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 noted by patients do not automatically update their charts. A provider or staff must enter the new information in their charts.

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** section under the respective tab. 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.

Consent & Signature

	All consent forms signed	
☑	No Show Policy	Required
☑	HIPAA Data Use Agreement	Required

I'm done