# 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.

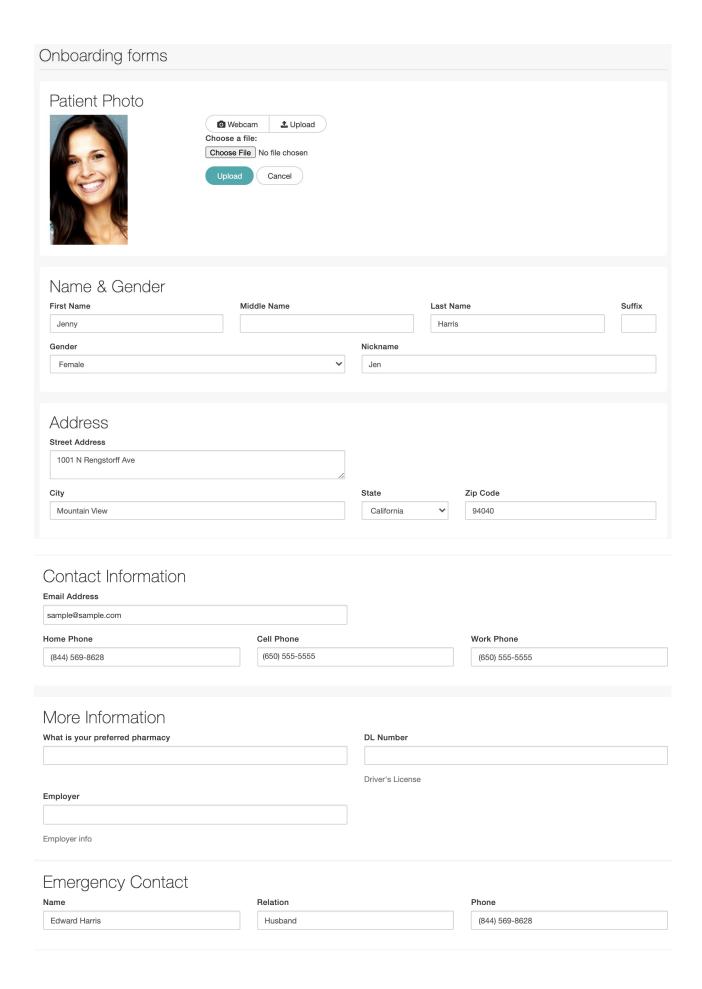
The information obtained through OnPatient check-in is stored in the patient's chart or their clinical visit.

## **Patient Chart Information**

The following sections populate information into the patient's chart:

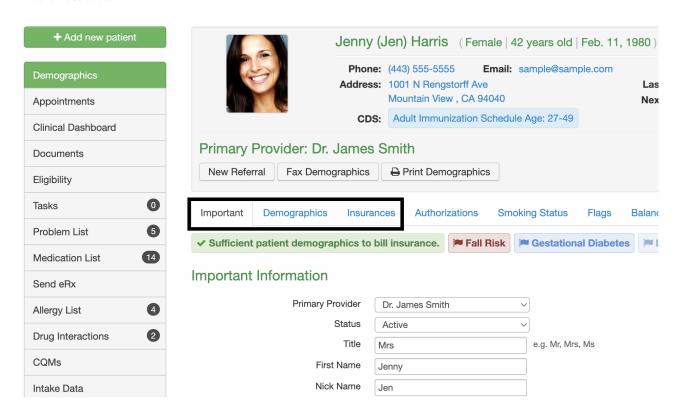
- Profile Photo
- Name & Gender
- Address
- Background Information
- Contact Information
- More Information (Custom Demographics)
- Emergency Contact
- Primary Insurance
- Secondary Insurance
- Insurance Photo
- Consent Forms

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.



#### Primary Insurance Primary Insurance Company Plan Name Ciana Test Plan Insurance ID Number Group Number 1234567890 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.

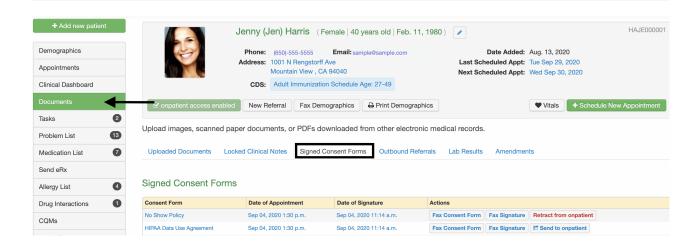


# **Consent Forms**

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

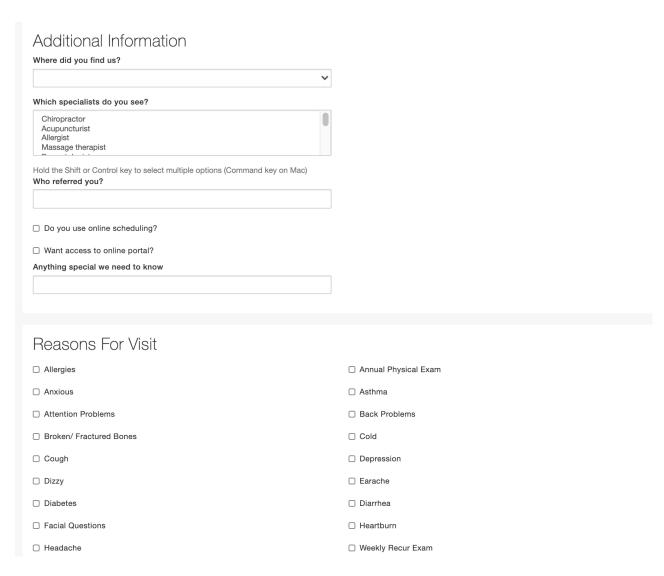
#### Consent & Signature



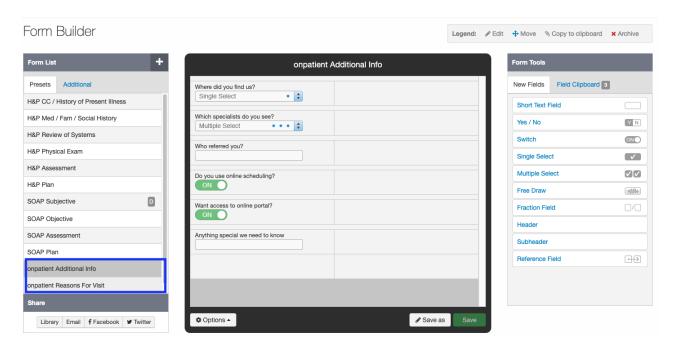


## **Clinical Note Information**

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.



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**

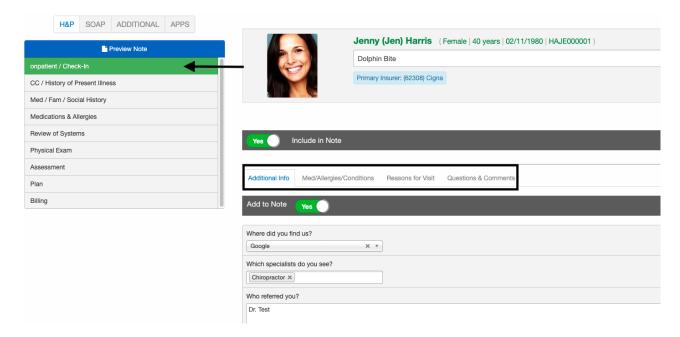
Patients can verify their medications, allergies, and conditions and document any changes. They can also note questions or comments for the provider.



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

Allergy	Reaction				Changes to allergies
Non-Drug Allergy: Cats	rgy: Cats Shortness of breath/difficulty brea				
Non-Drug Allergy: Milk Hives					
penicillin Hives d00170 aspirin Hives					
Changes to Me	edication	S			
Medication & Dosage			I	ndication	Changes to medications
Mirena 52 mg intrauterine device					
Flonase 50 mcg/inh nasal sp	oray				
Cranberry oral capsule					
12 Hour Nasal					
ZyrTEC 5 mg oral tablet, chewable amoxicillin 500 mg oral tablet					
Azithromycin 5 Day Dose Pa	ck 250 mg oral tab	let			
Changes to Me	edical Co	nditior	ns		
Problem		Code	Status	Diagnosed	Changes to medical conditions
Chronic urinary tract infection	n (disorder)	N39.0	active	07/25/2018	
Idiopathic scoliosis AND/OR (disorder)	kyphoscoliosis	M41.20	active	07/25/2018	
Multiple environmental allerg	ies (disorder)	T78.49XA	active	07/25/2018	
Questions & C	omments	6			
AUCOHOLIO A C					

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





#### I'm done