

Best Practices for Check-In

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Accurate patient information collected at appointment check-in is critical to ensuring clean claims and timely reimbursement. Suggested items to verify at each patient appointment include:

1. Verifying insurance details
2. Obtaining clear copies of the front and back of the patient's insurance card
3. Confirming insurance eligibility and obtaining benefit details from the DrChrono system
4. When the patient is covered by multiple carriers, confirming the correct priority order and collecting the subscriber's information is especially important
5. Depending on office policies, copays can be collected upfront, or financial obligations can be discussed with the patient so they are not surprised when they receive an invoice

Following these best practices can help prevent downstream errors such as claim rejections, denials, or payment delays. These steps provide billing teams with complete and reliable information, enabling faster claim processing, fewer rework cycles, and more predictable cash flow.
