

EPIC TRAINING



**ED eCheck-In
Quick Start Guide
HMTW ED Pilot**

HOUSTON
Methodist[®]
LEADING MEDICINE



Table of Contents

- ED eCheck-In Communication Information 4
 - Requirements for patients to receive notifications to complete the ED eCheck-In process 4
 - Requirements for patients using MyChart mobile app for this process..... 4
 - Methods to receive notifications..... 4
 - Updating Communication Preferences..... 4
- ED eCheck-In Workflow..... 5
 - ED Trackboard..... 5
- Patient eCheck-In Workflow 6
 - Patient Communication for eCheck-In..... 6
 - Patient Identification Verification..... 7
 - Patient Personal Information 8
 - Patient Insurance Information 8
 - Patient Questionnaires 10
 - Medicare Patients..... 10
 - Patient Documents 11
 - Completed ED eCheck-In..... 12
- Completing the registration..... 13
 - Using Patient Questionnaire Information 13
 - Adding Patient Coverage 15
 - Confirming Patient Documents 16
- Patient Estimate..... 17
 - Creating the Patient Estimate 17



Audience: HMTW ED

Patients have the option of using the **ED eCheck-In** process for completing their emergency visit registration using their smartphone. The patient is able to complete certain ED registration items online and pay emergency visit estimate amounts.

ED eCheck-In Communication Information

Requirements for patients to receive notifications to complete the ED eCheck-In process

- Current mobile phone/email address in demographics.
- Communication preferences in Epic include text messages/emails notifications.

Requirements for patients using MyChart mobile app for this process

- MyChart mobile app version installed on their device must be version 9.9.2 or higher.

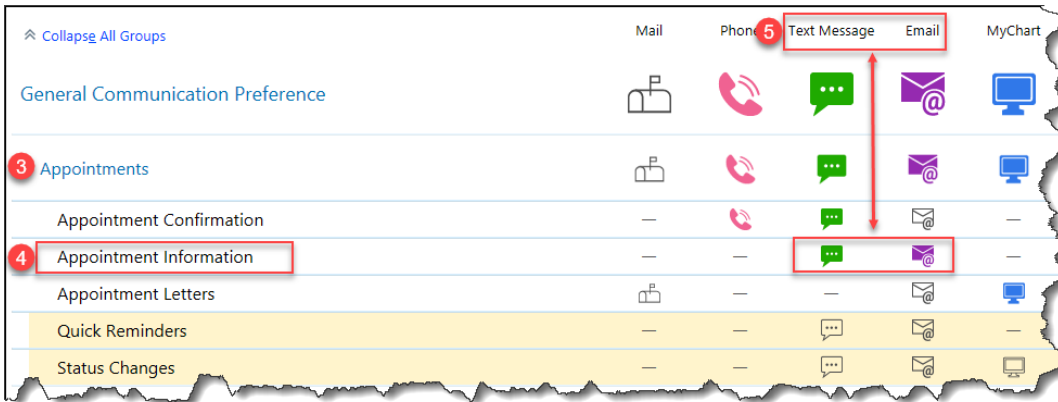
Methods to receive notifications

There are three ways patients can receive the notification to complete the ED eCheck-In process:

1. **Text Message** – must have communication preferences set to receive text messages in Epic.
2. **Email Communication** – must have communication preferences set to receive email notifications in Epic.
3. **Push Notifications** – must have MyChart mobile app with version 9.9.2 or higher installed on their device.

Updating Communication Preferences

1. In the patient registration, click **Additional Demographics**.
2. Click **Go to Communication Preferences**.
3. Click **Appointments**.
4. Select **Appointment Information**.
5. Update **Text Message** and **Email** preferences as requested by the patient.



ED eCheck-In Workflow

ED Trackboard

1. The patient is arrived using the **Arrival** quick registration workflow. A contact phone number and/or email is needed.
2. The patient is triaged, bedded, and seen by the ED provider.
3. The **First provider eval** is completed.
4. The patient record appears on the **Ready for Reg** tab.
5. The ED trackboard columns track the patient's **eCheckIn** progress.

- **First Provider eval** – when completed, the patient record displays in the **Ready for Reg** tab.
- **eCheck In Status** – hover over the **eCheck-In Status** to see the detail of that status.

First Provider	eCheck In Status
7725	Completed
7603	Completed
1533	In Progress
	Not Started

- **Not Started:** The patient has not started the **eCheck-In** process.
- **Not Offered:** The patient does not have an active MyChart account.
 - Status will change to **Not Started** after the 1st provider eval is complete
- **In Progress:** The patient emergency visit **eCheck-In** registration is in progress.

Personal Information: Completed
 Guarantor: Not Offered
 Insurance: In Progress
 Questionnaires: Not Started
 ESign Documents: Not Started

}

In Progress

- **Completed:** Personal, Guarantor, Insurance, Questionnaires and ESign documents have been completed.



Personal Information: Completed
 Guarantor: Completed
 Insurance: Completed
 Questionnaires: Completed
 ESign Documents: Completed

completed

ED Track Board (HMTW ED)

Refresh | Arrival | Room | Registration | Discharge | Identify Pt | Admit | Visit Contacts | Tx Team | Open Chart | ED Manager | ED Map | Sign In | Edit Shifts | My Note | Comments | Message Log | Legend | More

Ready for Reg (3) | Medically Stable Reg (0) | Ready for Identification (0) | To Be Admitted (0) | Ready for Discharge (0) | All Patients (6) | Ready for Dispo (0) | vICU (0) | More Views

Bed	Patient	Age	Complaint	A	TT	R/N/L/VN	MD/MID	Copay D	MSE Clear?	Copay P	Comments	Visit Contact Info?	Travel Screen Corr	MS	First Provider	eCheck In Status
ED18	Garlic, Nathan W...	42 y.o.	Fever	3	128.45	BD						✓			7725	Completed
ED21	Adt, Storyboard (F)	34 y.o.	test		126.40			0				⊘			7603	Completed
ED24	Adt, New (M)	35 y.o.	test		25.34							⊘			1533	In Progress
																Not Started

Patient eCheck-In Workflow

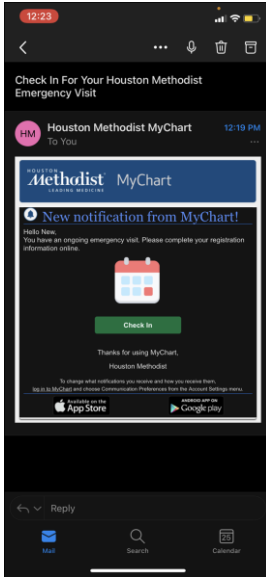
Patient Communication for eCheck-In

1. The patient receives a text or email to complete their emergency visit **eCheck-In** registration.



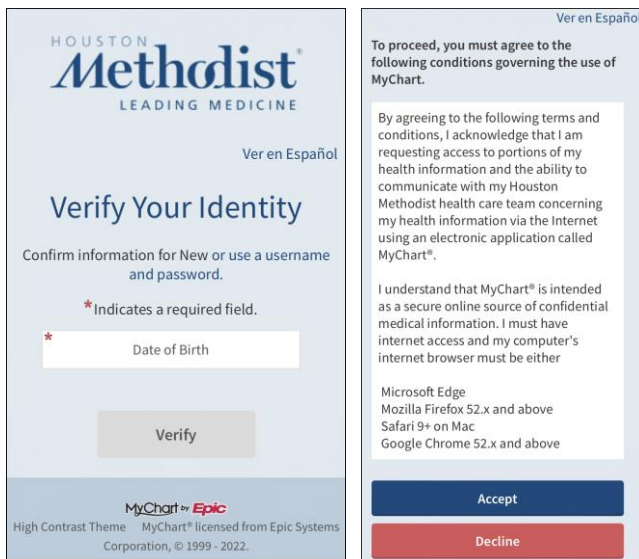


2. The patient can begin the eCheck-In process.



Patient Identification Verification

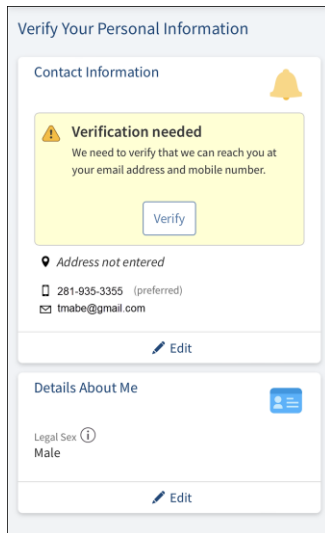
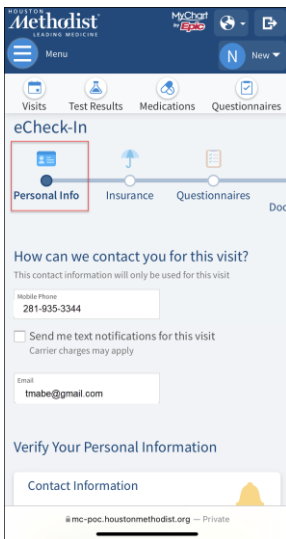
1. The patient verifies their identity.





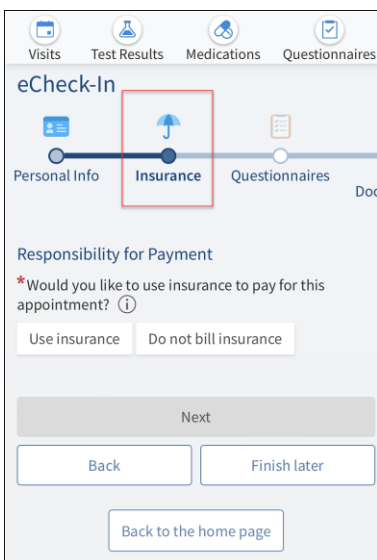
Patient Personal Information

1. The patient completes the **Personal Info** section of the **eCheck-In** workflow. Any updates to a patient's personal information automatically updates in their ED registration.



Patient Insurance Information

1. The patient completes the **Insurance** portion of the **eCheck-In** workflow.





2. The patient can add coverage information. RTE is automatically run when a patient adds an RTE enabled insurance plan.

Insurance on File

You have no insurance on file.

Add a coverage
Choose your insurance provider. If your insurance provider is not listed choose "Other".

* Indicates a required field

* Insurance
Cigna

Member Number
3453268999

* Are you the policy holder for this insurance?
Yes No

Please upload images of your insurance card. ⓘ

Add front
File types: BMP, JPEG, JPG, PDF, PNG, TIF, TIFF.
The maximum file size is 4 MB.

Insurance on File

You have no insurance on file.

+ Add a coverage

Pending Review

Cigna		Added
Subscriber Name	Adt, New	Subscriber Number 3453268999

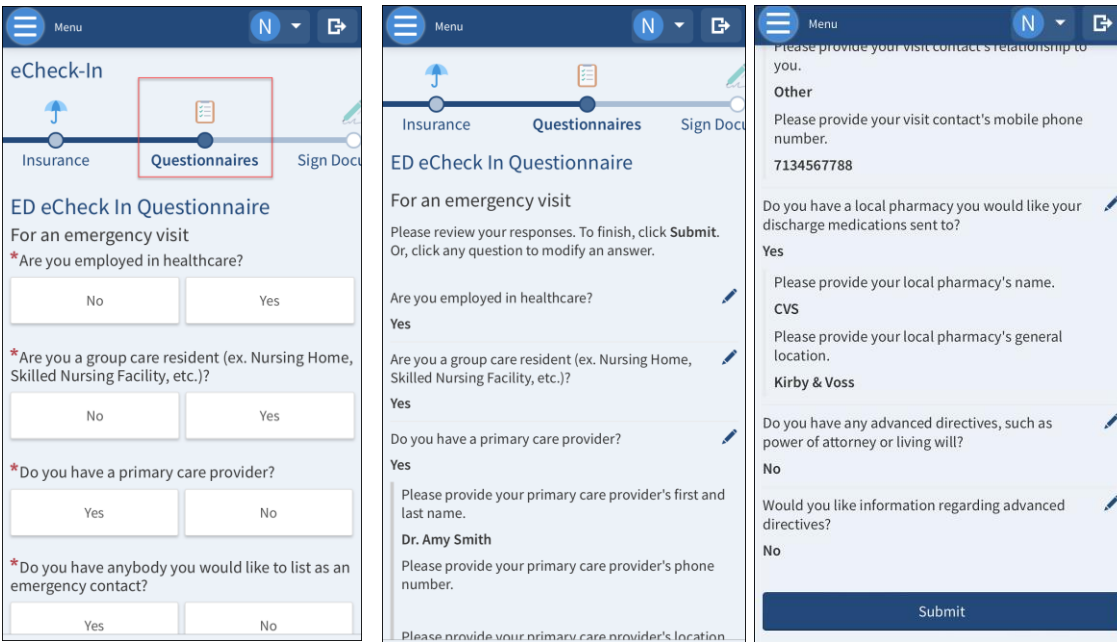
Next

Back Finish later



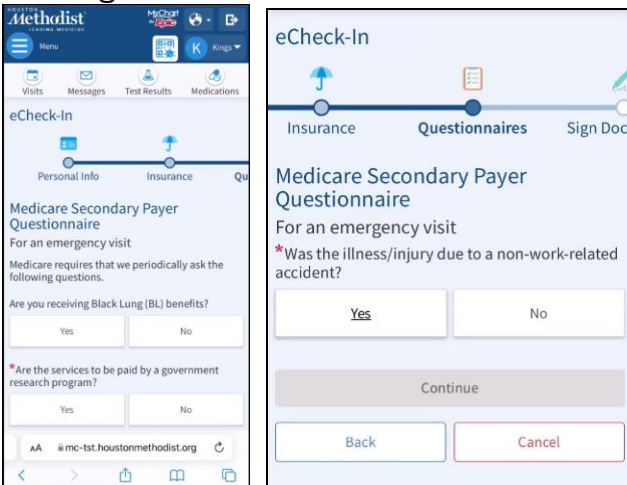
Patient Questionnaires

1. The patient completes the **Questionnaires** section of the **eCheck-In** workflow. The patient can edit information by clicking on the **pencil** icon.



Medicare Patients

1. For Medicare patients, the MSPQ automatically launches for the patient to complete it and files it to their registration.



ED eCheck-In Quick Start Guide

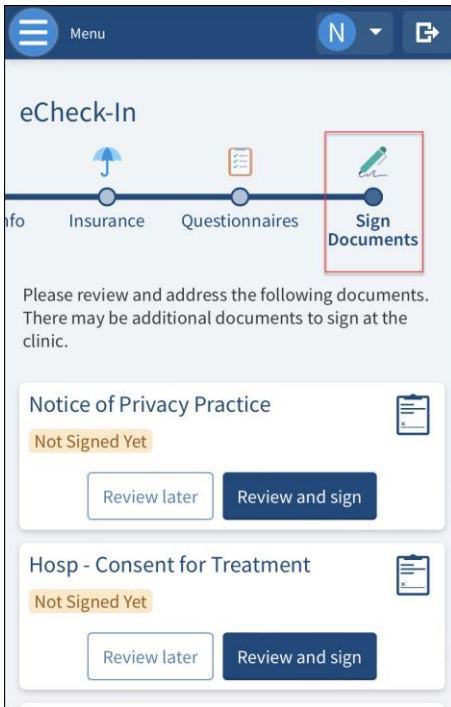
Created: 1/26/2022

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Patient Documents

1. The patient can review and sign documents during the **eCheck-In** workflow.



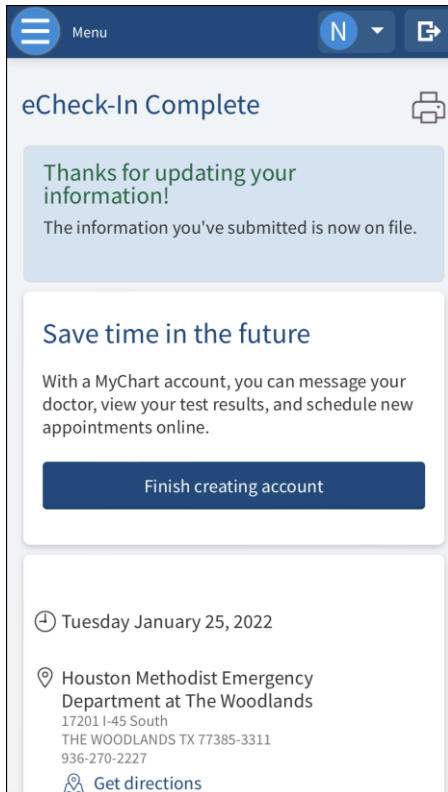
2. The patient can click **auto-generate** for their signature or click **Draw to sign** to sign with their finger.





Completed ED eCheck-In

1. The patient's eCheck-In is complete.

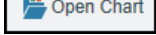




Completing the registration

Using Patient Questionnaire Information

To complete outstanding registration items and the registration checklist, answers to the patient questionnaire need to be transcribed from the patient chart into the registration.

1. From the **ED Track Board** toolbar, click .
2. Click the **Chart Review** tab.
3. Click the **Misc Reports** tab.
4. Double-click **MyChart – Patient Message Review Report**.
5. Click **Questionnaire Submission** link.

The screenshot shows the Epic MyChart interface. The 'Chart Review' tab is selected, and the 'Misc Reports' sub-tab is active. In the left-hand report list, 'MyChart - Patient Message Review Report' is highlighted. The main content area displays a list of messages sent to 'Mabe Test'. The message dated 1/24/2022 12:16 PM is highlighted, and the 'Questionnaire Submission' link in its subject line is circled in red.

Report	Description
Immunization Summary	Patient immunization history
Health Maintenance W/History	Health Maintenance
MyChart - Patient Message Review Report	MyChart Message Review Report
Diabetes Management Summary	Diabetes Management
Chart Review: Routing History	Chart Review: Routing History
HM AMB Facesheet	AMB Clinic Face Sheet
HM Medication List	List of current medications
Meds Dispense Information	Meds with dispense info
HM Longitudinal Plan of Care - Happy Together	Plan of Care
AMB Care Manager Registry Metrics	Care Manager Registry Report
HM MyChart - Telemed Consent Form	Video Visit Consent
HM External Transfer Report V2	HM EFTS
AMB Current Meds and Allergies	Meds & Allergies
HM Reg Hospital Face Sheet	Reg Hospital Face Sheet

Delivery	Read	From	Message Type	Attachments	Subject
8/8/2021 12:31 PM	N	Mychart, Generic	Patient Appointment Schedule Request		Appointment Missed
7/11/2021 12:32 PM	N	Mychart, Generic	Patient Appointment Schedule Request		Appointment Missed
7/7/2021 10:51 AM	N	Mychart, Generic	Patient Appointment Schedule Request		Appointment Scheduled
7/4/2021 9:45 AM	N	.Eardon, Michael J, MD	Case Reminder Message		Upcoming Procedure Information

Delivery	Read	To	Message Type	Attachments	Subject
1/24/2022 12:16 PM	Y	General Questionnaire Submission	General Questionnaire Submission		Questionnaire Submission



6. Using the patient answers to the questionnaire, enter the information in the appropriate registration fields.



Answers to the **employed in health care** and **group care resident** questions auto-populate in the additional demographics section of the patient registration.

- a. Patient **PCP** information
- b. **Emergency Contact** information
- c. **Visit Contact** information
- d. **Pharmacy** information
- e. **Advanced Directives** information

Patient Questionnaire

Patient Questionnaire Submission

Questionnaire: ED eCheck In Questionnaire

Question: Are you employed in healthcare?
Answer: No

Question: Are you a group care resident (ex. Nursing Home, Skilled Nursing Facility, etc.)?
Answer: No

a Question: Do you have a primary care provider?
Answer: Yes

Question: Please provide your primary care provider's first and last name.
Answer: chen, david

Question: Please provide your primary care provider's phone number.
Answer: 2818898877

Question: Please provide your primary care provider's location.
Answer: houston tx

Question: Would you like your primary care provider notified of your visit?
Answer: Yes

b Question: Do you have anybody you would like to list as an emergency contact?
Answer: Yes

Question: Please provide your emergency contact's first and last name.
Answer: test, Daniel

Question: Please provide your emergency contact's relationship to you.
Answer: Spouse

c Question: Please provide your emergency contact's phone number and specify the type (home or mobile).
Answer: 2819877788

Question: We send out text messages on your progress throughout your visit. Would you like for us to use this emergency contact to receive status updates throughout the course of your visit?
Answer: Yes

d Question: Do you have a local pharmacy you would like your discharge medications sent to?
Answer: Yes

Question: Please provide your local pharmacy's name.
Answer: cvs

Question: Please provide your local pharmacy's general location.
Answer: houston tx

e Question: Do you have any advanced directives, such as power of attorney or living will?
Answer: Yes

Question: Do you have the document with you? We would like to make a copy of this for your record.
Answer: No



Adding Patient Coverage

If the patient added coverage during the **eCheck-In** process, RTE is automatically run for RTE enabled insurance plans. The plan needs to be attached to the **patient encounter** in Epic.

1. In the **Possible Coverage to Create** section on the **IFS**, you will see insurance information the patient added during the **eCheck-In** workflow.
2. Click the **Response Received** button.

The screenshot shows the 'ED Update' interface with a sidebar on the left containing navigation options like 'Intambiszero, Kings', 'Emergency Visit Info', and 'Hospital Accounts'. The main content area displays 'Guarantor Demographics' and 'Coverage Info' for two insurance plans: '1. E-MEDICARE/MEDICARE PART A' and '2. E-AETNA/AETNA PPO OPE'. Below this, a section titled 'Possible Coverages to Create' is highlighted with a red box and a red '1' in a circle. It lists 'Bcbs (from MyChart)' with a 'View Query' link and 'Member ID: Intambiszero,Kings 1245'. At the bottom of the interface, a 'Response Received' button is highlighted with a red box and a red '2' in a circle.

3. On the **Eligibility Response** form, click **Create New Coverage** to attach eligible coverage to the **patient encounter**.

The screenshot shows the 'Patient Eligibility Response' form. The 'Query Status' section shows a green checkmark and the word 'Eligible', with patient details: 'Patient: Asap Orders', 'As of: January 12, 2022', and 'Payer: Bcbs'. Below this is the 'Administrative Use Only' section containing various system codes and settings. On the right side, a 'Take an Action' panel is visible, containing two buttons: 'Create New Coverage' (with a green plus icon and a red '3' in a circle) and 'Ignore Response' (with a red X icon).



Confirming Patient Documents

Confirm the receipt of the signed documents in the **Documents** folder.

1. When the patient signs the documents via **eCheck-In** workflow, the document **Status** is set to **Received**.
2. The **Received By** column displays **OPEN SCHEDULING, BACKGROUND** for documents signed during the **eCheck-In** workflow.
3. Obtain any other unsigned documents to complete the registration.

Documents

New Document Type + Add Show All Documents Refresh Filter

+ 1 Notice of Non C... + 2 ABN + 3 Surprise Billing...

Type	1 Status	2 Received By	Received On	Expire...
Estimate	Received	ADT, PATIENT ACCESS	01/24/2022	-
Disaster ImmTrac Consent	Received	OPEN SCHEDULING, BACKGRO...	01/24/2022	-
CBO Auth for Disp & Use of Inf	Received	OPEN SCHEDULING, BACKGRO...	01/24/2022	-
CBO ROI	Received	OPEN SCHEDULING, BACKGRO...	01/24/2022	-
Hosp - Consent for Treatment	Received	OPEN SCHEDULING, BACKGRO...	01/24/2022	-
Notice of Privacy Practice	Received	OPEN SCHEDULING, BACKGRO...	01/24/2022	-
Adult ImmTrac Consent	-	MABE, KARA	08/26/2021	-
PAS Patient Disclosures	Not Received	-	-	-
Medicare Message	-	-	-	-
Medicare OP Obs Notice	Not Received	-	-	-



Patient Estimate

Creating the Patient Estimate

1. Use **HB Case** estimate to pull historical data.
2. Enter the acuity level CPT Code.

Estimate

Emergency Visit at Houston Methodist The Woodlands Hospi

Patient TEST, MABE [100171567]	Guarantor TEST, MABE [12715]	Primary Coverage Self-Pay
-----------------------------------	---------------------------------	------------------------------

HMTW Parent

Account Class: Emergency
Hospital Historical Case: **CPT® 99282 - HC ER VISIT LEVEL II**

3. The patient is notified of the estimate via text/email.

HOUSTON METHODIST SERVICE AREA

New Estimate

Account ending in 2715

Hi Mabe,

You have a new estimate for a visit on Jan 24.

Estimate Summary

Subtotal	\$905.00
Discount	-\$452.50
Your Estimated Portion	\$452.50

[View estimate details](#)

Prepay Due
\$452.50

[Make a payment](#)

Have questions about your estimate or need further assistance?
Call 832-667-6291

[Change your communication preferences](#)

4. The estimate is available for the patient.

Emergency Department

Thanks for updating your information!
The information you've submitted is now on file.

Monday January 24, 2022

Houston Methodist
Emergency Department at
The Woodlands
17051 I-45 South
THE WOODLANDS TX 77380-3311
936-270-2227
[Get directions](#)

Get ready for your visit!

[Make payment](#)
\$452.50
Save time by completing payments ahead of time.

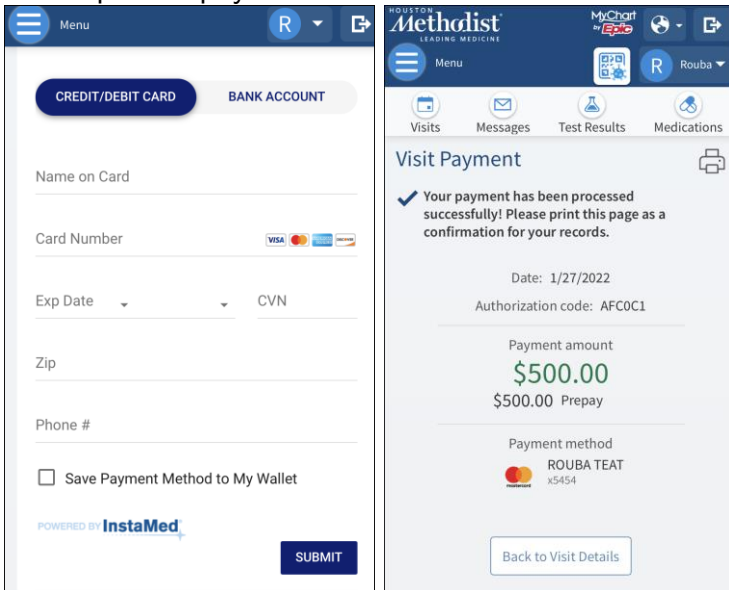
Review your questionnaire answers below.
 ED eCheck In Questionnaire (Print)

This visit cannot be canceled online. To cancel, please call 936-270-2227.

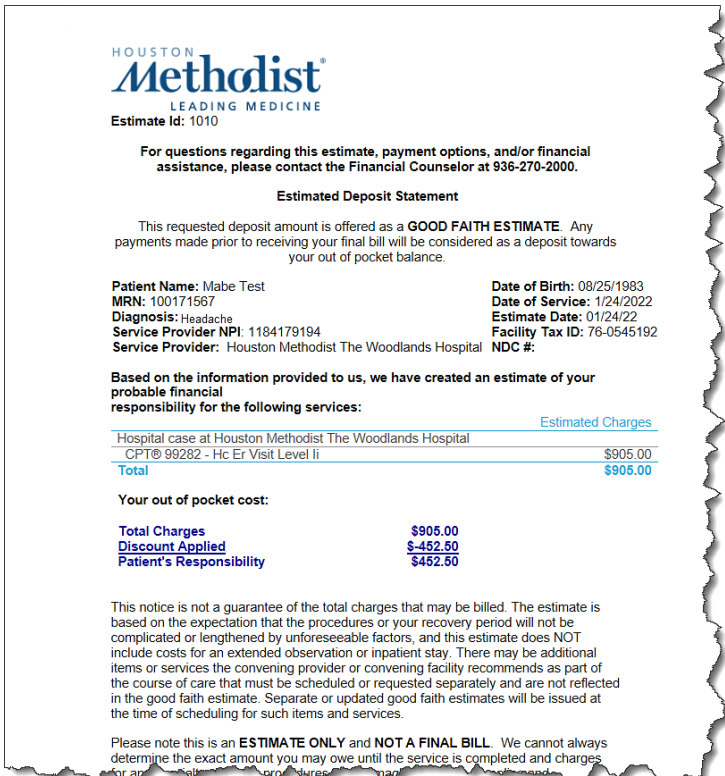
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5. The patient pays the estimate amount and receives an email when the payment is processed.



6. The registrar confirms payment and the patient signs the estimate letter.





7. The patient record falls off the **Ready for Reg** tab. Completed registration, eCheck-In status and payment information display on the **All Patients** tab on the **ED Track Board**.

ED Track Board (HMTW ED)

Refresh | Arrival | Room | Registration | Discharge | Identify Pt | Admit | Visit Contacts | Tx Team | Open Chart | ED Manager | ED Map | Sign In | Edit Shifts | My Note | Comments | Message Log | Legend | More

Ready for Reg (4) | Medically Stable Reg (0) | Ready for Identification (0) | To Be Admitted (0) | Ready for Discharge (0) | **All Patients (6)** | Ready for Dispo (0) | vICU (0) | More Views

Bed	Patient	Age	Complaint	TT	RN/LVN	Provider	Primary Payor	Disposition	Reg	Visit Conti	Copay D	Copay P	Comments	Pt Clk FYI	eCheck In Status	Payment Remaining
—	Six, Patient (M)	45 y.o.	—	—	—	—	—	—	—	⚠	—	—	—	ED	Not Offered	0.00
ED24	Adt, New (M)	35 y.o.	test	21:13	—	—	CIGNA	—	✗	⚠	—	—	—	ED	Not Started	0.00
ED21	Adt, Storyboard (F)	34 y.o.	test	122:19	—	—	CIGNA	—	✗	⚠	0	—	—	ED	Not Started	0.00
ED18	Garlic, Nathan W "Nate" (M)	42 y.o.	Fever	124:24	BD	—	—	—	✗	✓	—	—	—	ED	Not Started	0.00
ED11	Test, Rouba "Rabroub" (F)	32 y.o.	Headache	122:16	—	—	AETNA	—	✗	✓	0	—	—	ED	Completed	1,500.00
ED08	Test, Mabe (F)	38 y.o.	Headache	01:48	—	—	—	Medical Screening...	✓	✓	0	—	—	ED	Completed	0.00