

## Established Patient Check-In Process

### NextGen Patient Portal

#### Review Prior to Beginning

**0.1 After each step, always click "Save"**

Save
Reset
Cancel

**0.2 Once information is saved a message will read "The information you entered has been successfully saved"**

✔ The information you entered has been successfully saved.

**0.2 After saving information in each section, navigate to the top and click "NEXT"**

Appointment Check-in Process

Use the select menu or PREV and NEXT buttons below to navigate the Appointment Check-in Process.

Appointment Check-in

NEXT

#### Patient Check-In

**1.1 Click yellow "Appointment Check-in" box**

\$0.00  
Balance Due  
View Current Charges

Schedule an Appointment  
Schedule an Appointment

06/22/2020  
2:30 PM  
Appointment Check-in  
Appointment Check-in

Review Medical Record  
Review Medical Record

0  
New Messages  
Message a Provider  
Message a Provider

Contact Us  
Contact Us

**1.2 Click "NEXT" to begin the process**

Appointment Check-in Process

Use the select menu or PREV and NEXT buttons below to navigate the Appointment Check-in Process.

Appointment Check-in

NEXT

#### Verify Patient Information

**2.1 Verify contact information, if updates are needed click "UPDATE PATIENT INFORMATION"**

+ UPDATE PATIENT INFORMATION

Patient Information

<b>Name</b>	VICTORIA DEMO
<b>Date of Birth</b>	08/18/1988

**2.2 Verify insurance information, if updates are needed click "ADD PATIENT INSURANCE"**

+ ADD PATIENT INSURANCE

Insured	Payer	Group No.
DEMO, VICTORIA	Aetna	001122

#### Enter Reason for Visit

**3.1 Type reason for visit in search box and select from automated list**  
**3.2 Click "Add it manually"**

If not available in search results

**3.2 Click "Add it manually"**

What is the reason for the visit?

Lookup a reason for this visit using the Search

e.g., Sore Throat (3 Characters Min)

CLEAR SEARCH

Don't see the results you're looking for? Add it manually.

**3.3 Enter reason for visit in new text box**  
**3.4 Click Save**

What is the reason for the visit?

Save
Reset
Cancel

\* Reason for Visit

\_\_\_\_\_

## Body System Review

### 4.1 Select "Mark All No"

or the body systems.

MARK ALL "NO"  CLEAR ALL

Save Body System Information

### 4.2 Select body system that relates to reason for visit & answer questions in that section

General	✓
Head	✓
Eyes	✓
Nose	✓

## Allergies & Medications

### 5.1 Click "Add Allergy" and enter appropriate information

ADD ALLERGY

No known allergies

Allergen	Symptoms	Type
There are currently no records to display		

### 5.2 Click "Add Medication"

ADD MEDICATION

No medication history

Medication	Directions
There are currently no records to display	

### 6.3 Type medication name in search box and select appropriate dosage

### 6.4 Answer additional information about medication

\* Search medications

e.g. Tylenol

CLEAR SEARCH

How many pills or units are taken at a time:

-- Select one --

What best describes the pills or units taken:

### 6.5 Click "Save Medication"

### 6.6 Repeat steps until all medications are entered

How frequently is this medication taken (e.g., twice a c

-- Select one --

Please enter the reason for taking this medication:

Save Medication

Cancel

## Complete Check-In

### 7.1 Click & complete any section without a green checkmark

- ✓ 1. What is the reason for the visit?
- ✓ 2. Body System Review
- ✓ 3. Have you been told you are allergic to a substance?
- ✓ 4. Are you taking any new medications?
- ✓ 5. Medical History
- ✓ 6. Family History
- ✓ 7. Surgical History
- ✓ 8. Tobacco History
- ✓ 9. Alcohol History
- ✓ 10. GAD-7
- ✓ 11. PHQ-2

### 7.2 Click "Complete Check-In Process"

Complete Check-in Process