

MyPennMedicine Pre-Check In Quick Start Guide

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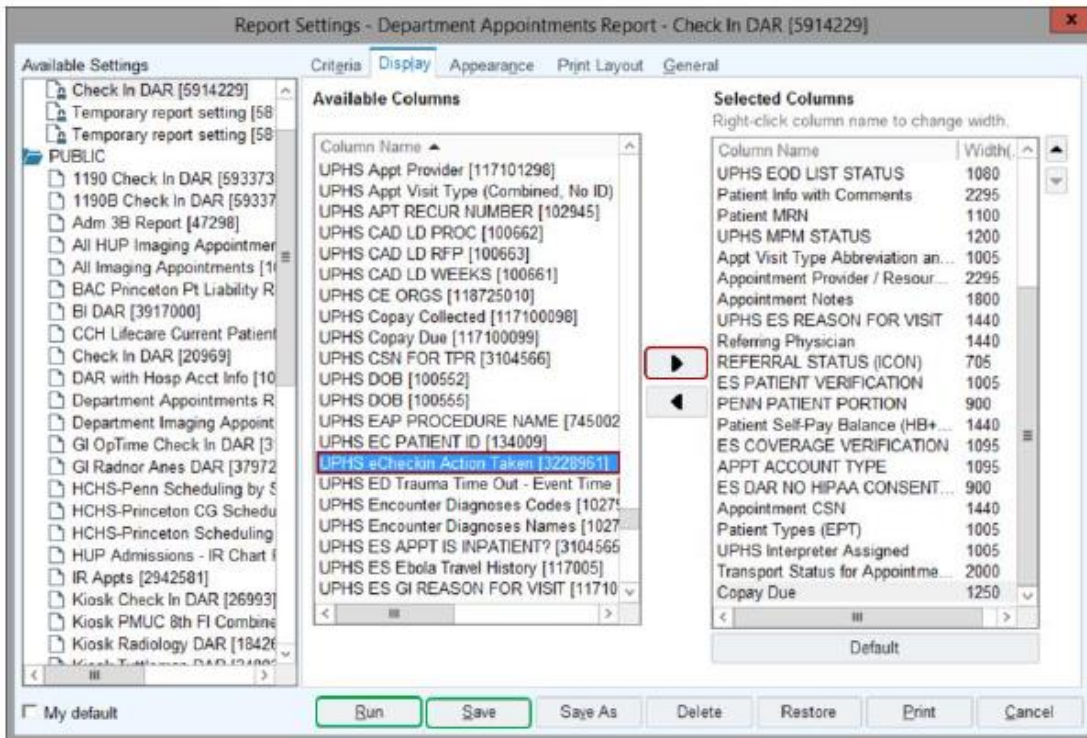
Introduction

myPennMedicine Pre-Check In is a feature that allows patients to verify or request updates to their information such as; demographics, (address, race, ethnic background, preferred language, home number, work number, preferred number, & e-mail address), preferred pharmacies, medications, allergies, health issues, complete questionnaires (where applicable) and even sign certain consents electronically, up to 4 days prior to coming into their appointment within myPennMedicine.

Adding the Pre-Check In Column to your DAR

Follow these steps to add the Pre-Check In column to your personal DAR. Note: This column is already available by default on public DARS.

1. Open your DAR
2. Navigate to the Display tab
3. In the Available Columns window, select **"UPHS eCheckin Action Taken"** and click the right arrow to move it to your Selected Columns window
4. Press Save and Run the report



5. The column will now display on the activity toolbar as **PreCk Update**.

Department Appointments Report: Melissa DAR

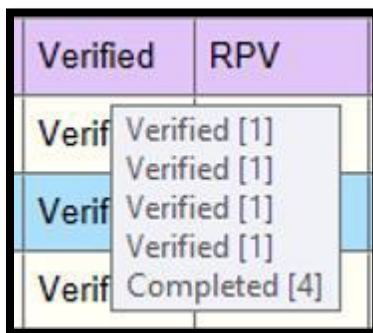
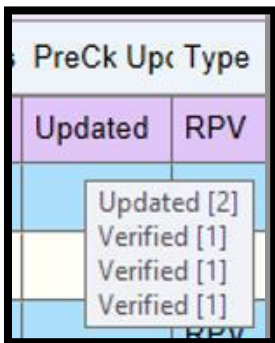
Refresh Settings App Desk Walk In Sign In Check In Check Out Cancel Appt Info Expand Message Registration EQD More

1 Full Appointment List 2 Appointment Totals

Date: 5/8/2020 PENN FAMILY CARE PMUC [989] Total: 192 Row Height: 1

Date	Appt Time	Appt Provider/Resource	Appt Status	Patient Location	Status	Type	MPM STATUS	PreCk Update	Patient-E
05/08/2020	9:20 AM	MYERS, ALLISON	Arrived	PENN FAMILY	Arrived	COV [3592]	Activated	Updated [2]	
05/08/2020	9:20 AM	EDGAR, RICHARD J	Arrived	PENN FAMILY	Arrived	COV [3592]	Activated		Updated [2] Verified [1] Verified [1] Verified [1] Completed [4]
05/08/2020	9:20 AM	GANETZKY, DAVID	Sch		Sch	COV [3592]	Activated		
05/08/2020	9:20 AM	LIANG, YA-FENG	Arrived	PENN FAMILY	Arrived	COV [3592]	Activated		

6. If you hover over the response in the column, you will see 4-5 lines.

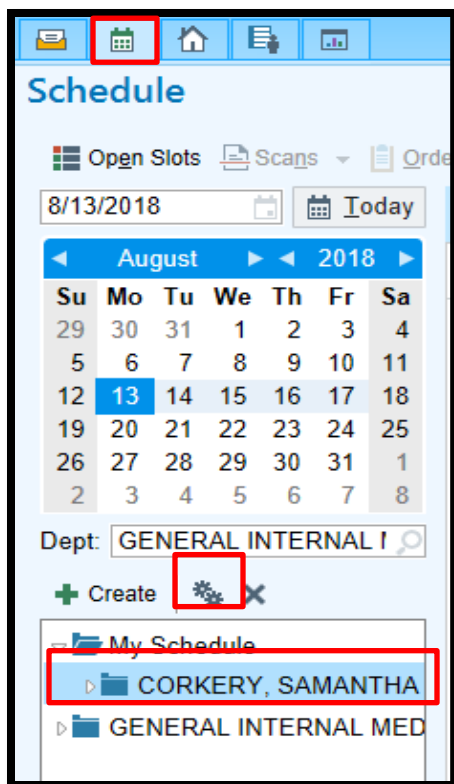


- The lines refer to the actions in MPM.
- Each will say Verified or Updated.
- The numbers shown are the IDs of the response in the list.
- When you edit or mark an item as correct, the corresponding line will show as Updated or Verified in the column.
- If patients decide to finish later, then only the lines that are updated or completed will show up on the column.
- The column will show as Updated or Verified depending on what the response is in the first line.

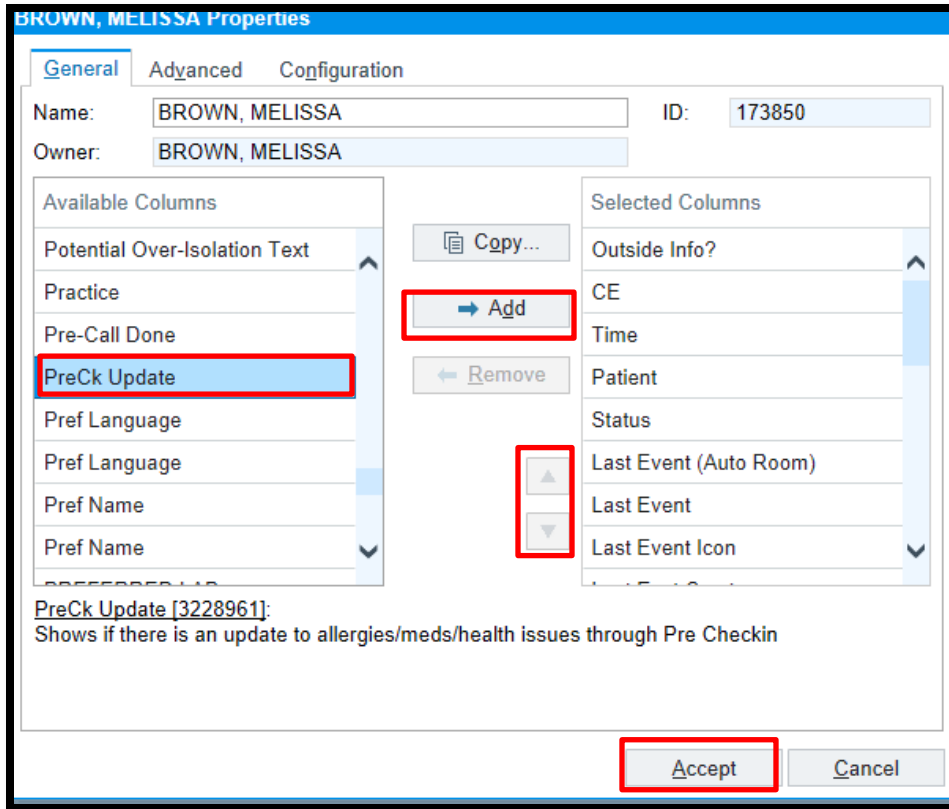
Adding the Pre-Check In (PreCk Update) Column to your Multi Provider Schedule (MPS)

Follow these steps to add the Pre-Check In column to your MPS, which is available by default on the department MPS. This column will allow clinical staff to review information provided by patients via the Pre-Check In processes on myPennMedicine. This column is only specific to Pre-Check In and will not show information available from Care Everywhere i.e. other healthcare institutions or pharmacies.

1. Open your personal MPS
 - a. **NOTE:** You can only add columns to your personal MPS, not the Department MPS
2. Click on the gears to add the column to your MPS



3. Once you click on the gears, search for the "PreCk Update" in the Available Columns.
4. Click on "PreCk Update?" and then click the Add button to move it to your Selected Columns.
 - a. Note: if providers would like to add an additional column that populates if there is also information available from Care Everywhere they can add the "Outside info?" column at this time as well.



5. You can move that column up or down in the toolbar by using the down and up arrows if you would like to.
 - a. If you have also added the "Outside info?" column it may be helpful to place these columns near each other.
6. Once you have that column where you would like it, you can press Accept

Viewing the Pre-Check In (PreCk Update) and Column on your MPS with examples

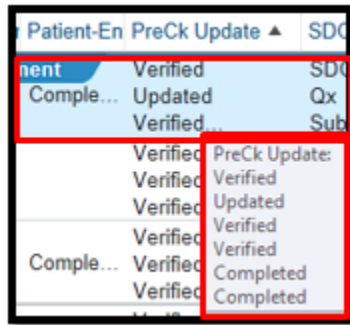
This is how the new column will look on your MPS

1. If there is a list of statuses such as *Verified*, *Updated* or *Completed* in the "PreCk Update" column, this indicates that the patient completed Pre-Check In. By hovering over the list you will see the full drop down list of statuses.
 - a. *Verified* indicates they reviewed current information in pennchart and made no changes
 - b. *Updated* indicates they added new information or requested a change to existing info

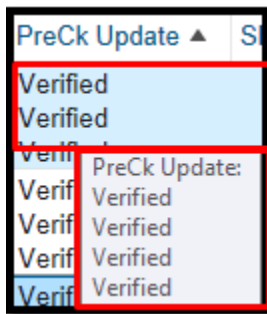
- c. *Completed* refers to certain steps in Pre-Check In such as signing a form or completing a clinical questionnaire.
- 2. By double clicking the patient icon you will be taken directly to the "Reconcile Outside Info" activity in the patient's chart
- 3. The rows will appear in the order below and correspond to the actions taken in MPM



Example 1) The patient completed Pre-Check In and updated clinical information in addition to completing the outpatient general consent form and a clinical questionnaire



Example 2) No general consent or questionnaire was assigned or completed but clinical information was updated



Example 3) No outpatient general consent form was completed but clinical information was updated and a questionnaire was completed

Unar Patient-En PreCk Update ▲	
No	Verified Updated Verified...
No	V PreCk Update: V Verified V Updated V Verified
Yes Started	V Verified

Viewing Patient Updated Clinical information; Medications, Allergies and Health issues

Information provided by patients will display a patient icon with the word 'patient' appearing next to it under source. These requests for updates through myPennMedicine may be added, updated, or discarded in the 'Reconcile Outside Info' activity. (for more information on reconciliation please see [Reconciler Functionality tip sheet](#) or this [brief tutorial video](#))

Medications: Example new medication reported (green) and removal of medication requested (red)

Reconcile Outside Info

Allegries Medications Problems Immunizations

Dispense Report Medication Reconciliation History

Medication	Sig	Start Date	End Date	Source	Updated on
ALPRAZOLAM (BENZODIAZEPINES)					
XANAX (alprazolam) Susp New Add as: alprazolam oral suspension Patient's comments: for anxiety		12/1/2019		Patient	
BIOTIN (WATER SOLUBLE VITAMINS)					
biotin 1000 MCG tablet On chart Patient requested removal Dismiss Patient's comments: not taking	Dose: 1,000 mcg	Take 1,000 mcg by mouth daily.		Local Medical Record	11/15/2019
CALCIUM CARBONATE-VITAMIN D					
calcium carbonate-vitamin D 500-200 MG-UNIT per tablet On chart Patient requested removal Dismiss	Dose: 1 tablet	Take 1 tablet by mouth daily.		Local Medical Record	12/12/2019

Allergies: New allergy reported (green)

The screenshot shows the 'Reconcile Outside Info' window with the 'Allergies' tab selected. A table lists allergy entries. The entry for 'Bee Pollen' is highlighted in green, indicating it is a new allergy. The reaction is 'Hives'. The source is 'Patient'. The 'Updated on' field is empty. There are buttons for '+', '-', and 'e' (edit) next to the entry. A 'Discard Remaining' button is at the bottom right.

Agent	Reaction	Severity	Reaction Type	Comments	Source	Noted	Updated on
Bee Pollen	Hives			New Patient's comments: since childhood	Patient		

Problems: removal requested (red)

The screenshot shows the 'Reconcile Outside Info' window with the 'Problems' tab selected. A table lists problem entries. The entry for 'Edema' is highlighted in red, indicating a removal request. The status is 'On chart'. The source is 'Local Medical Record'. The 'Updated on' field is '12/16/2010'. There are buttons for '+', '-', and 'e' (edit) next to the entry. A 'Resolve' button is at the bottom left. A 'Dismiss' button is at the bottom right. The 'Patient's comments' field contains 'no longer active problem'.

Agent	Reaction	Severity	Reaction Type	Comments	Source	Noted	Updated on
Vitreous hemorrhage				New Add as: Vitreous hemorrhage (CMS-HCC)	Wills Eye Ophthalmology Clinic Inc	1/24/2014	11/15/2019
Edema				On chart Patient requested removal Dismiss Patient's comments: no longer active problem	Local Medical Record	12/16/2010	12/16/2010

Viewing updated Demographic information in PennChart

Updates that patients make to demographic information such as Address, Race, Ethnic background, preferred language, home number, work number, preferred number and e-mail address, will continue to file directly to Pennchart.

1. Staff can review prior registration information in the Registration history in PennChart. Information provided by the patient will appear as being completed by the user "penmedicine,my".

Registration History Report

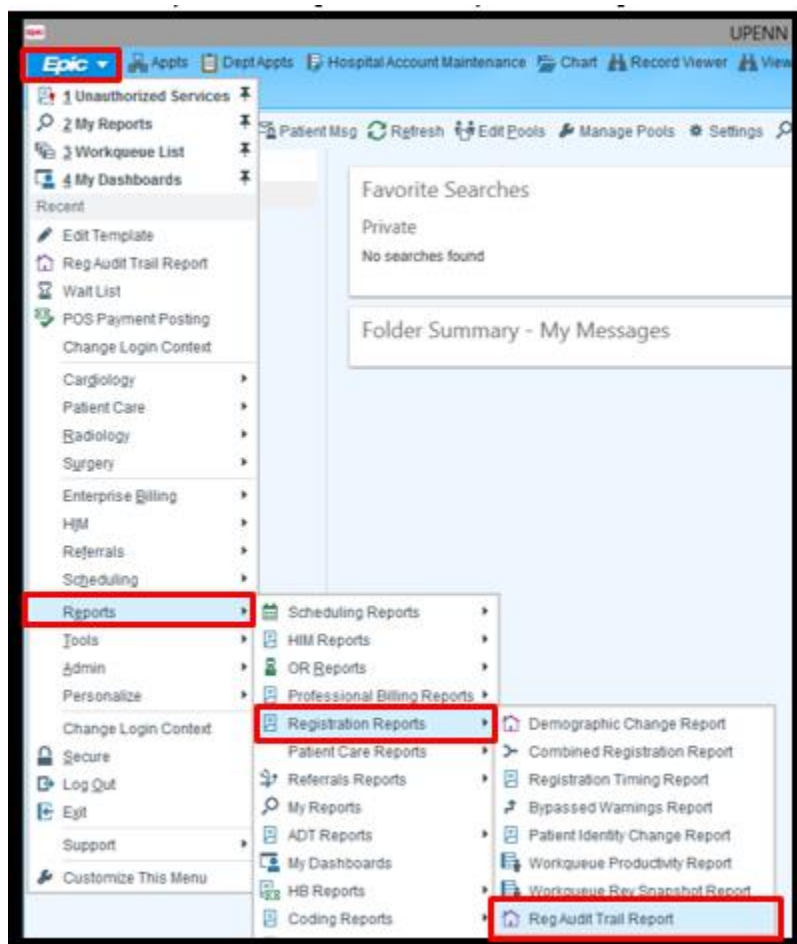
Registration History for the Patient Encounter

Time of Entry	Type	User	Department	From Other Reg
9/19/2018 10:51 AM	Patient encounter created	SMITH, KRISTY M	CHCKGE	
9/19/2018 10:51 AM	Confirmation error	SMITH, KRISTY M	CHCKGE	Unknown
9/19/2018 10:51 AM	Visit account assigned	SMITH, KRISTY M	CHCKGE	Unknown
9/19/2018 10:51 AM	Visit coverage assigned	SMITH, KRISTY M	CHCKGE	Unknown
9/19/2018 10:51 AM	Encounter entered workqueue	SMITH, KRISTY M		
9/20/2018 1:19 AM	Coverage member verified	RTE, BATCHES		Unknown
9/20/2018 1:19 AM	Encounter left workqueue	RTE, BATCHES		
9/26/2018 2:08 PM	Address change	PENMEDICINE, MY		Unknown
<p><u>Old address</u> 952 HERMAN DR</p> <p><u>New address</u> 123 Main St</p> <p>Source record - Patient: [452467814] Coverage: IBC/BC PERSONAL CHOICE EXCHANGE [4096795]</p>				
9/26/2018 2:08 PM	Address change	PENMEDICINE, MY		Unknown

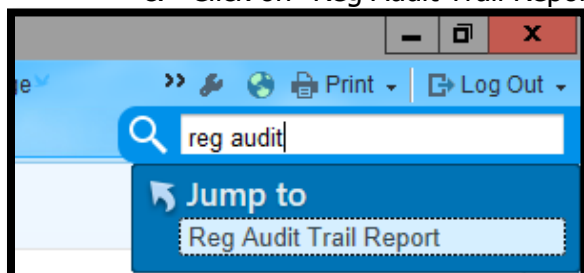
Pathways to Run the Reg Audit Trail Report

There are two different pathways to get to the report. Follow the steps below to run the Reg Audit Trail Report.

1. To run the report from the EPIC button -EPIC button > Reports > Registration Reports > Reg Audit Trail Report



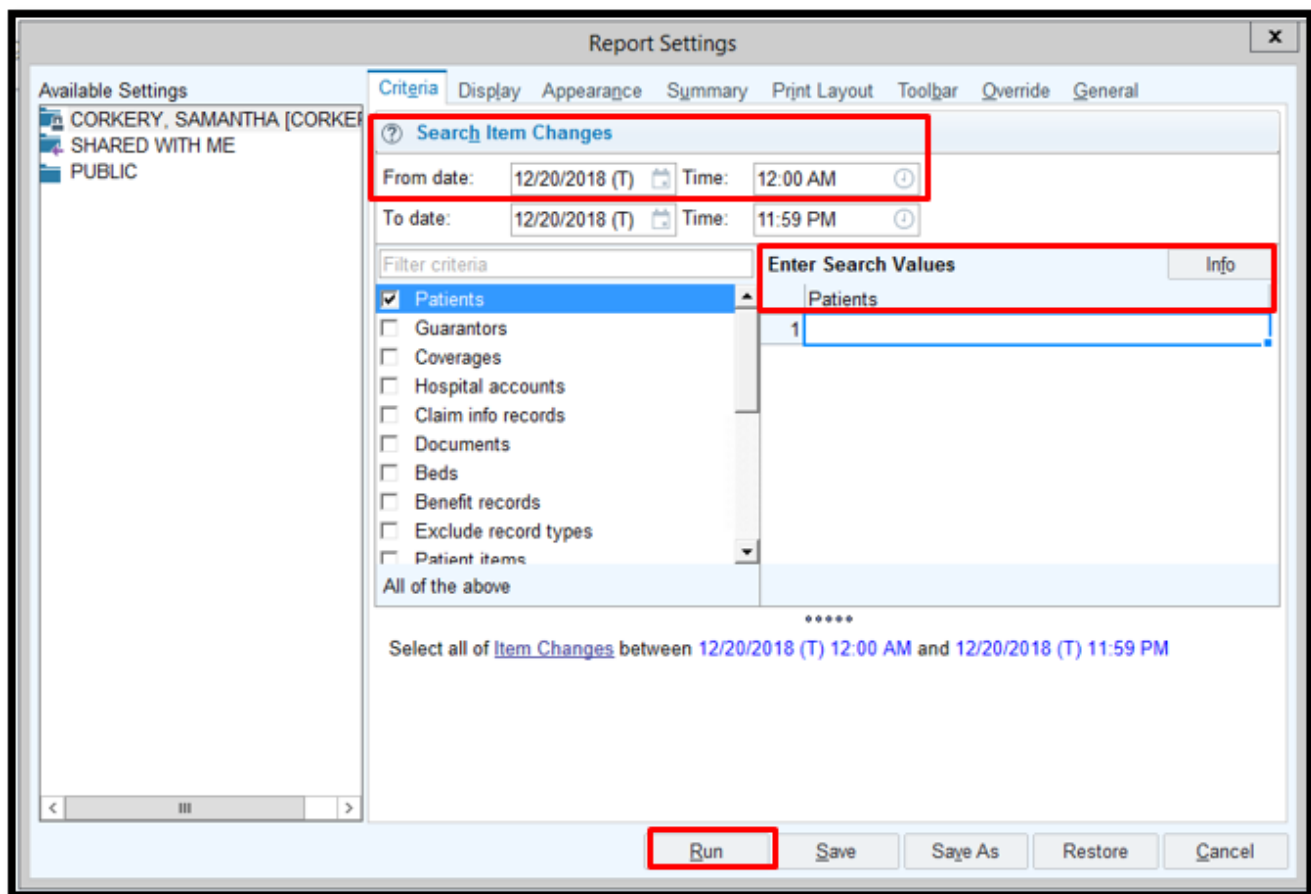
2. To run the report from the search window
 - a. Navigate to the search bar at the top right of your screen (under the Log Out button)
 - b. Type "Reg Audit"
 - i. DO NOT PRESS ENTER OR TAB
 - c. Click on "Reg Audit Trail Report" from the Jump to window



How to Run the Reg Audit Trail Report

The Reg Audit Trail Report is used to show changes that were made to a patient's account including registration, guarantors, coverages and HARs. Follow the steps below to run the Reg Audit Trail Report.

1. Type the patient's name or MRN number in to the Patients field
2. Select the time frame for which you want to search the patient's chart for changes
3. Click Run



How to Read the Reg Audit Trail Report

The Reg Audit Trail Report can show a lot of information depending on the date range and other criteria that you input. The report is configured like an Excel spreadsheet. You can filter by each column header by clicking on the header portion.

1. The **Record Type Column** indicates which type of record the change occurred in.
 - a. i.e. Patient record, Coverage records, Guarantor record. This column corresponds to the Criteria options that are available when running the report.
2. The **Record Column** indicates which record you are searching in

- a. This will usually be your patient
3. The **Item Column** indicates which item was changed
 - a. i.e. Phone number, Address, Coverage
4. The **Old Value Column** indicates the value that was in the patient's chart before a change was made
5. The **New Value Column** Indicates what the old value was changed to
6. The **Date and Time Column** indicates when the end user made the change

The **User Column** indicates the end user who made the change

Record Type	Record	Cnct #	Item	Line	Old Value	New Value	Date and Time	User	Patient
Patient	ZZZEPIC ANTONETTE P [330001900]	N/A	PHONE NUMBERS [90]	1	999-999-9999	215-555-5555	12/20/2018 09:08:30 AM	CORKERY, SAMANTHA [CORKERY]	Zzzepic, Antonette P
Patient	ZZZEPIC ANTONETTE P [330001900]	N/A	OTHER COMMUNICATION NUMBERS [98]	1*	999-999-9999	215-555-5555	12/20/2018 09:08:30 AM	CORKERY, SAMANTHA [CORKERY]	Zzzepic, Antonette P

Viewing The signed annual consent form in PennChart

The Signed outpatient annual consent form will be available in the media tab filed under the date it was completed by the Patient via Pre-Check In.

The screenshot displays the PennChart interface. The 'Chart Review' window is open, showing a list of documents. The 'Media' tab is selected. A document titled 'Outpatient Annual General Consent Form' with a date of 08/25/2018 14:20 is highlighted with a red box. The right-hand pane shows 'Media Information' for this document, including document and source information.

Date/Time	Document Type	Description	Enc Date	File Attached to
Yesterday at 13:56	After Visit Summary	After Visit Summary	Yesterday	08/28/2018 Office Visit with Va...
Yesterday at 13:49	After Visit Summary	After Visit Summary	Yesterday	08/28/2018 Office Visit with Va...
Yesterday at 13:34	Registration	new patient registration	Yesterday	08/28/2018 Office Visit with Va...
Yesterday at 13:11	Release of Informa...	2018 release of information	Yesterday	08/28/2018 Office Visit with Va...
Yesterday at 12:59	Outpatient Annual...	2018		[052023843]
Yesterday at 12:53	Patient Identification	PA license 2018		[052023843]
Yesterday at 12:52	Insurance Card	horizon bcbs & Geisinger #2		[052023843]
08/25/2018 14:20	Outpatient Annual...			[052023843]
08/22/2018 14:34	AMB - Consultation	UROLOGY	08/07/2018	SCANNED RESUL...
08/31/2017 10:48	AMB - Consultation	UROLOGY CONSULT	08/11/2015	SCANNED RESUL...
08/31/2017 10:32	Prior Records / Du...	RECORDS FROM PREVIO...		[052023843]
08/07/2017 09:16	Patient Questionn...	RETURN PATIENT QUESTI...	07/28/2017	Scanned Document...
07/28/2017 12:12	Insurance Card	insurance 2017		[052023843]
07/28/2017	General Consent F...		07/28/2017	Office Visit with Jaff...
12/09/2016 10:04	HIM ROI Authoriza...	RELEASE AUTH		[052023843]
12/09/2016 10:02	Patient Identification	DL PHOTO-old		[052023843]
12/09/2016 10:02	HIPAA Form	HIPAA		[052023843]
12/09/2016 10:01	Insurance Card	BCBS 1-1-16		[052023843]
12/09/2016	Assignment of Be...	AOB	12/09/2016	12/09/2016 Office Visit with Maj...