



## MyChart eCheck-in

### Frequently Asked Questions

#### Q: How do I eCheck-in and sign consents?

A: Once signed into myChart follow the steps below for eCheck-in.

*Please note: You may eCheck-in up to 5 days prior to the day of the appointment.*

1. From the myChart Welcome screen, click the green eCheck-In button next to the scheduled appointment.

The screenshot shows the MyChart website interface. At the top, there is a navigation bar with the MyChart logo and user information. Below the navigation bar, there is a 'Welcome!' section with a user profile for 'Aunt 2'. The main content area is divided into several sections: a 'Learn more' button, a 'Research Annual Report' section with 'Open Research Annual Report' and 'Dismiss' buttons, a 'Pinscher 3' section with a 'Begin Visit' button, and a 'North Follow Up Visit' section. The 'North Follow Up Visit' section includes details for a visit on March 19th at Blue Clinic with Amy Lynn McIntosh. A red circle highlights the 'eCheck-In' button in the bottom right corner of the 'North Follow Up Visit' section.



## 2. Sign Consents:

- a. Click **Review and Sign** for each consent, the consent will open for review and signature.

- b. Enter your full name.
- c. Indicate your relationship to patient.
- d. Signature box will **not be enabled** until steps 2b-c are completed. Once enabled, click on the signature box and your signature will be generated by the system.



- e. Once all documents have been signed, click Next to proceed to the next step.

Please review and address the following documents.

<p><b>MyChart Proxy Access</b>          ✓ Signed on 3/17/2021</p> <p>Review</p>	<p><b>eCom</b>          ✓ Sign</p>
<p><b>Consent to Treatment</b>          ✓ Signed on 3/17/2021</p> <p>Review</p>	<p><b>Privac</b>          ✓ Sign</p>
<p><b>Financial Agreement</b>          ✓ Signed on 3/17/2021</p> <p>Review</p>	<p><b>Assign</b>          ✓ Sign</p>

Once this step is completed, documents will be submitted for clinic review.

Next Finish later

### 3. Verify Personal Information:

- Click **Edit** to update your demographic info.
- After review, click the checkbox next to **'This information is correct'** to confirm the demographic info.
- Click **Next** to proceed to the next step. **Please note: if step 3b is not completed, you may not proceed to next step.**
- Click **Finish Later** to exit the eCheck-In process.



## 4. Verify Insurance Info:

The screenshot shows a web form titled "Insurance on File" for "Aetna Commercial / Aetna - Generic". The form contains the following fields and buttons:

- Subscriber Name:** Zzztest, Queenjo (marked with red callout 'c')
- Subscriber Number:** G45544434
- Member Number:** 4545343434
- Group Number:** G6546444654
- Buttons:**
  - Update coverage:** (marked with red callout 'a')
  - Remove coverage:** (marked with red callout 'b')
  - Add insurance card photos:** (marked with red callout 'c')
  - Add a coverage:** (marked with red callout 'd')
- Confirmation:** A checkbox labeled "This information is correct \*" (marked with red callout 'e').
- Navigation:** "Back", "Next", and "Finish later" buttons (marked with red callout 'f').

- Click **Update coverage** to review or edit the patient's insurance coverage.
- Click **Remove coverage** if you wish to remove coverage.
- Click **Add Insurance Card Photos** to upload the patient's insurance card
- Click **Add A Coverage** to add an additional coverage and proceed to step 5 for further instructions.
- Click the checkbox next to '**This information is correct**' to confirm the patient's insurance information or if you do not have an insurance coverage. Upon completion of this step the '**Next**' button will be enabled and **turn green**.
- Step 3e is required. If you wish to exit eCheck-In before completing 3e, click **Finish Later**. You may return to the previous page by clicking **Back**.

**\*\*Please note: any edits completed in steps 3a-d are sent to hospital staff for further review. Upon their review, staff will finalize the requested changes.**





## 5. Adding a Coverage:

A screenshot of a web form titled "Add a coverage". Below the title is a sub-header: "Choose your insurance provider. If your insurance provider is not listed choose 'Other'." Below this is a note: "\* Indicates a required field". The main form area contains a dropdown menu labeled "Insurance" with a red asterisk to its left. A red circle with the letter "a" is positioned to the right of the dropdown menu.

- a. From the drop-down menu and select 'Other'
- b. Complete all the required information (**labeled with a red asterisk**), upload insurance card (if available), and click **Submit**.
  - o Note: The **Submit** button will not be available until all required information is provided.

A screenshot of the "Add a coverage" form. The "Insurance" dropdown menu is set to "Other". Below it are several required fields, each marked with a red asterisk: "Insurance", "Member Number", and "Group Number". Below these is a question: "\* Is the patient, Pinscher Zzztest, the policy holder for this insurance?" with "Yes" and "No" radio buttons. Below the question is a section for uploading insurance card images, with two dashed boxes labeled "Add front" and "Add back". Each box contains the text: "File types: BMP, JPEG, JPG, PDF, PNG, TIF, TIFF" and "The maximum file size is 3 MB." At the bottom of the form are "Submit" and "Cancel" buttons, and a checkbox labeled "This information is correct" with a red asterisk.



- c. The added coverage will appear under 'Pending Review' until hospital staff finalize review of the new coverage. If no additional coverage needs to be added, confirm verification by clicking 'This information is correct' and click **Next**.

Insurance on File

Aetna Commercial  
Aetna Choice Pos li

Remove coverage

Pending Review

Amerigroup Added

Subscriber Name: Aberdeen, Archer  
Subscriber Number: 78451239

This information is correct

BACK NEXT FINISH LATER

## 6. Complete Questionnaires:

- a. If there is no photo ID on file or if the photo ID on file has expired, you will be prompted to upload Driver's License. If you are unable to upload photo ID, click **No** and then click **Continue**, otherwise click **Yes** and follow the instructions to upload photo.

Sign Documents Personal Info Insurance Questionnaires

### Drivers License upload

For an upcoming appointment with Heather M Richard, PsyD on 5/22/2020

Are you able to upload a photo or copy of your driver's license?

¿Puede usted subir de su teléfono, conmutador o tableta una fotografía o una copia de su licencia de manejar?

Yes No

CONTINUE FINISH LATER CANCEL

- b. Depending on the reason for visit, you may be presented with a series of questionnaires to complete. You will need to answer each question and click **Continue**. Upon completion of the questionnaire(s), you will have the opportunity to review your answers and will then click **Submit** to finalize questionnaire(s).

Sign Documents Personal Info Insurance Questionnaires

### Follow up visit: History of Present Illness

For an upcoming appointment with Amy L McIntosh, MD on 5/22/2020

How is the problem or condition changing over time?

unchanged resolved gradually improving rapidly improving gradually worsening rapidly worsening  
waxing and waning

CONTINUE FINISH LATER CANCEL





7. eCheck-in Complete:

- a. Confirmation of eCheck-In will appear, you can print the barcode to scan at the hospital kiosk if the patient is attending appointment in person.

- b. You will also see the eCheck-In completed status from the myChart Welcome screen:

