

# Patient Portal Self-Check-In Workflow

**The guide outlines the steps patients will take to navigate through the portal self-check-in process.**

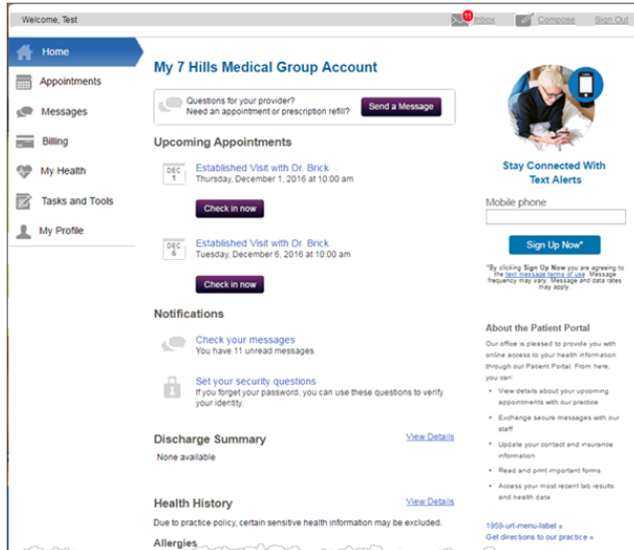
Patients will now complete health history forms as part of their pre-appointment self check-in workflow. If there are multiple patient health history forms available for a single appointment type, questions are merged and present a single workflow to the patient.

Self check-in is available to portal and non-portal users, so everyone completing self check-in has the opportunity to update their health history information prior to their appointment. Once patients complete self check-in, they cannot access the health history form again.

The links to health history forms have been removed from the Patient Portal for clients that have self check-in enabled.

## How a patient completes health history forms from a computer

1. Begin the pre-appointment self check-in workflow on a computer either through a ReminderCall email or from the Patient Portal by clicking **Check in now**:



2. The last step in the workflow is **Health History Forms**. Review the summary page and, if necessary, click **Update** to add/remove/update conditions, or click **No Changes**.

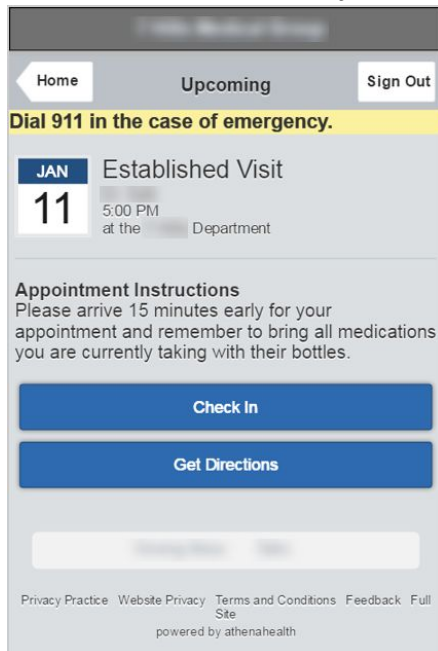
A screenshot of the '7 Hills Medical Group Health History Form' page. The page title is 'Health History Form'. The main heading is 'Has your health changed since your last visit?' with the subtext 'Let us know if our health records are up to date.' There are two main sections: 'Medications' and 'Allergies'. The 'Medications' section has a 'Needs review' icon and 'No Changes' and 'Update' buttons. It lists: Aspirin 500 mg Tablet, delayed Release; Crestor; Crestor 10 mg Tablet; Daliresp 500 mcg Tablet; and Doxycycline Hyclate 100 mg Capsule. The 'Allergies' section also has a 'Needs review' icon and 'No Changes' and 'Update' buttons. It lists: Dog Dander and House Dust (Reaction: Chest pain - Mild to moderate). A 'Show all' link is visible at the bottom of the medications list.

3. Click **Continue** at the bottom of the page to finish self check-in.

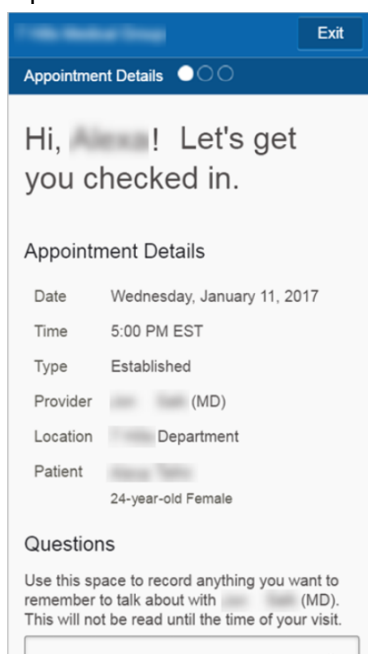
4. When the patient arrives, reconcile the patient's completed health history information within the encounter through the usual reconciliation workflow, or print the form from the Check-in page and manually reconcile it.

### How a patient completes health history forms on a mobile device

1. Begin the pre-appointment self check-in workflow on a mobile device from a ReminderCall email or by tapping **Check In** on the mobile Patient Portal:



2. Enter any **Questions** you'd like to discuss with your provider during your visit and tap **Continue**.




3. Review your contact information and, if necessary, tap **Update** to edit the information, or tap **No Changes**.  
The Health History Form appears.

7 Hills Medical Group **Exit**

Health History Form ●●●

Has your health changed since your last visit?  
Let us know if our health records are up to date.

 **Medications**  
Needs review

**No Changes** **Update**

Current Medications

**Crestor**

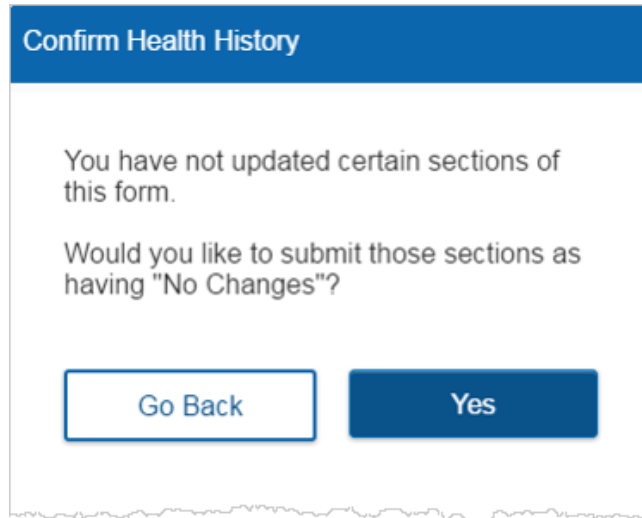
**Daliresp 500 mcg Tablet**

**Doxycycline Hyclate 100 mg Capsule**

Health History Forms on a mobile device include these sections:

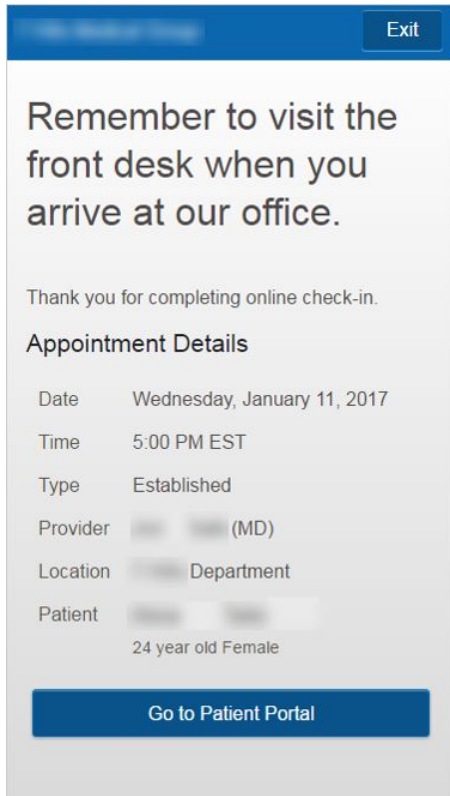
- o Medications
  - o Allergies
  - o Medical History
  - o Surgical History
  - o Social History
  - o Family History
  - o Obstetrics and Gynecology (if applicable)
4. To make changes, tap **Update** or **Add** , depending on the section. Edit your information and tap **Save**.

- o If you tap **No Changes** on each health history section, this message appears at the end of the self check-in workflow:



- o You can go back and make changes or tap **Yes** to complete self check-in.

A final confirmation section appears.



5. When the patient arrives, reconcile the patient's completed health history information within the encounter through the usual reconciliation workflow, or print the form from the Check-in page and manually reconcile it.