# Business Office Operations Policy 702

**Patient Check-In Procedure**

Effective Date: August 9, 2023
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Policy: Client Check in Procedures - Business Office personnel will receive and check-in clients prior to providing services

Procedure:

I. New Patients
   a. Patient is received by individual at Front Office Desk and asked to sign in.
   b. Patient or legal guardian must complete new patient information via paper or on-line via the patient portal.
   c. Business Office Personnel
      i. Scan patient's insurance card(s) (front and back) and photo ID into the EMR system
      ii. Collect co-pay, if applicable
      iii. Once patient is scheduled, they will be issued a portal login. In the portal, they will be able to complete all paperwork and upload a copy of their insurance card(s) and photo ID.
      iv. If patient states they do not have their insurance card, an attempt is made to obtain verification of services. If carrier cannot verify coverage while patient is at the Center, the patient is informed that he/she will have to private pay for that day's service or reschedule the appointment.

II. Returning Patients
   a. Patient is received by individual at Front Office Desk and is asked to sign in legibly.
   b. The business associate will confirm that all paperwork (consents) and demographic information is up to date.
   c. If patient has NOT been seen within the past year, the business associate will:
      i. Ask the patient to complete required paperwork (General Consent, Education Release, and Demographic Info if that has changed) and update information in the EMR.
      ii. Scan in current insurance card (front and back) and photo ID.
      iii. Check for eligibility with insurance carrier.

III. Therapy Patients
   a. First day of therapy patient will check in with business office and update any of the necessary forms or insurance card or IDs
   b. The business associate will scan insurance card (front and back) and photo ID.
   c. Complete needed paperwork if it has been over a year.
   d. Check with insurance for eligibility if not completed prior to visit.
   e. Collect co-pay each visit, if applicable.

IV. All Patients
   a. Patient should not be taken to clinic until all consents are signed.
   b. Clinician will complete the billing, and the patient will pay remaining charges at the time of check out.