

# Upload Consents

## PURPOSE:

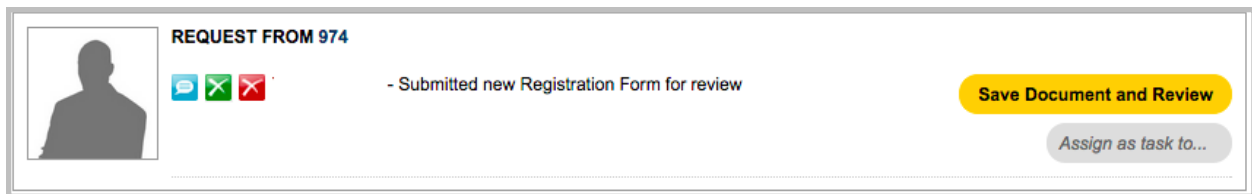
1. Ensure charts are being completed for upcoming appointments.
2. Move requests quickly and efficiently through the flow of the practice.
3. Create continuity with document labeling and processing.

## PROCEDURE:

*Expected Time Frame: As needed.*

Consents include the following documents: Arbitration Agreement, Client Agreement, Informed Consent, Medicare Opt Out, Patient Guide, Registration Forms, Release from [Practice Name], and Release to [Practice Name].

Once the patient completes consent documents, they come into the PPQ as shown below:



1. Click the patient's name to open the chart.
2. In the PPQ, click on "save document and review."
3. Scroll through the informed consent document to make sure the patient signed and completed it.
4. Title: leave as it defaults
5. Document Type: informed consent

### Arbitration Agreements:

1. Patient Notification: leave to default (notification not needed).
2. Show in patient's portal.
3. Needs to be reviewed by doctor: [insert name]
4. Click **Save, Unreviewed**
5. From the patient dashboard, click the tags in the black Patient Information box.
6. Un-check the Arbitration Agreement to show it's been received and "save and close."

### Client Agreements:

1. Patient Notification: leave to default (notification not needed).
2. Show in patient's portal.

3. Click **DONE! File Document**

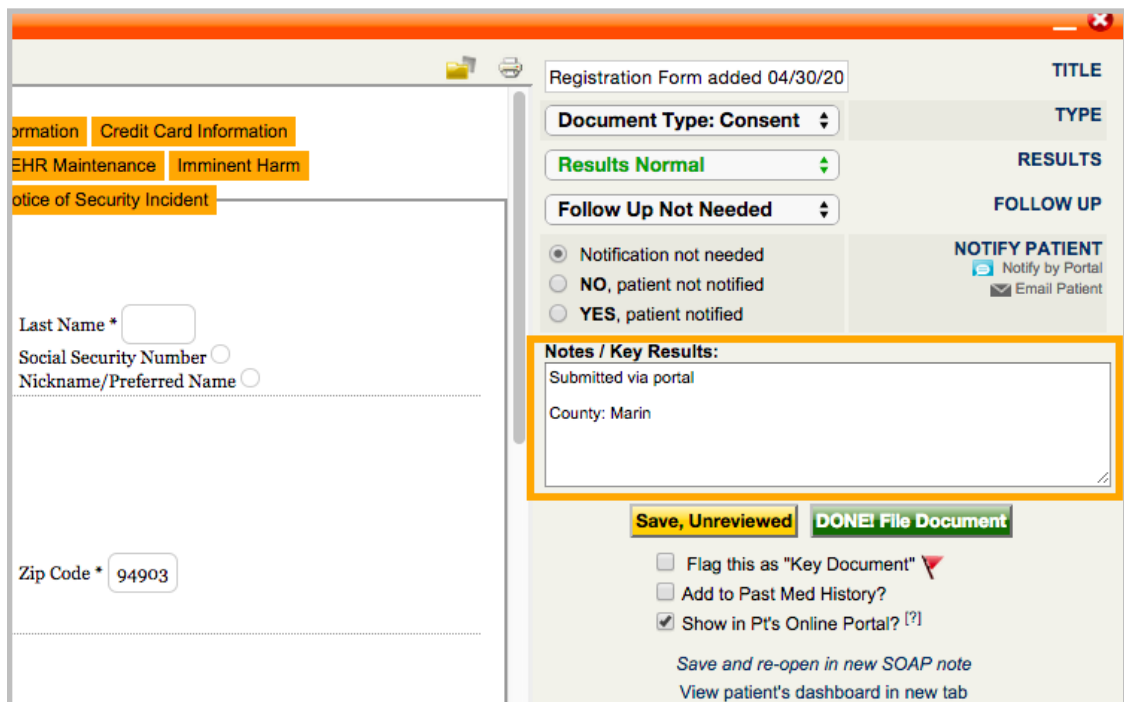
Medicare Opt-Out:

1. Patient Notification: leave to default (notification not needed).
2. Show in patient's portal.
3. Click **DONE! File Document**
4. From the patient dashboard, click the tag in the black Patient Information box.
5. Un-check the Medicare Opt Out to show it's been received.

Registration Forms:

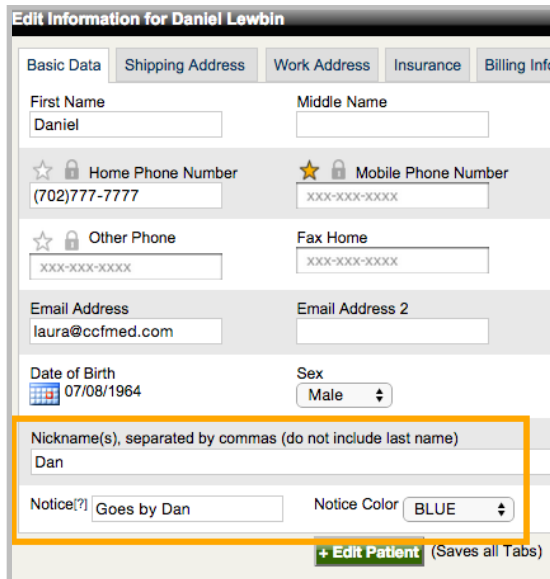
1. These often come in with one of two errors that you need to check:
  1. Date of birth: check to make sure the year was not entered as the current year. If it was, in the "Notes/Key Results" box to the right, make a note: "NEED CORRECTED DOB."
  2. For California residents, sometimes the county is missing. If so, use Google to search "what county is [zip code]." In the "Notes/Key Results" box to the right, make a note: County: [county name].

Example below outlined in orange:



2. Go to the patient's chart to check their assigned provider. Then from the document preview, click Needs to be reviewed by: [insert name].

3. Patient Notification: leave to default (notification not needed).
4. Show in patient's portal.
5. Click **Save, Unreviewed**
6. From the patient dashboard, click the pencil in the black Patient Information box. Check every tab to fix any grammatical errors (i.e. capitalization of proper nouns, make sure whole words are not capitalized, etc.).
7. Make sure phone numbers are formatted correctly: (xxx) xxx-xxxx.
8. Remove any duplicate phone numbers (some patients put their mobile number also in the home & work phone number boxes).
9. If more than one phone number was entered, put an "\*" at the end of the preferred number (will have a yellow star above it).
10. If there is a nickname filled in that is different from the patient's full first name, below that in the Notice box put "Goes by [nickname]" and make the Notice Color blue. Example below, outlined in orange:



**Edit Information for Daniel Lewbin**

Basic Data | Shipping Address | Work Address | Insurance | Billing Info

First Name: Daniel | Middle Name:

Home Phone Number: (702)777-7777 | Mobile Phone Number:

Other Phone: | Fax Home:

Email Address: laura@ccfmed.com | Email Address 2:

Date of Birth: 07/08/1964 | Sex: Male

Nickname(s), separated by commas (do not include last name): Dan

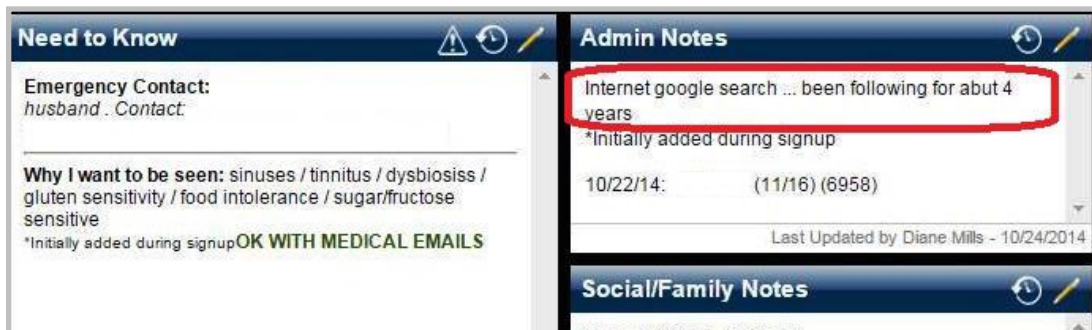
Notice: Goes by Dan | Notice Color: BLUE

**+ Edit Patient** (Saves all Tabs)

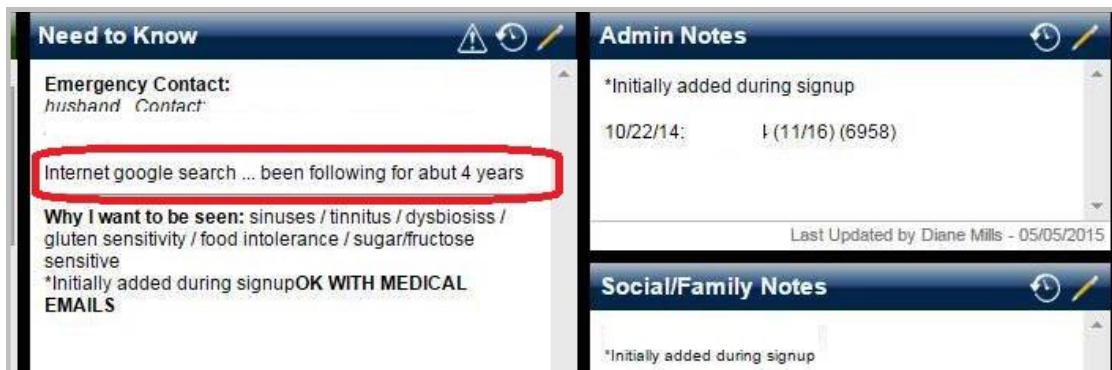
11. If patient is a California resident, put the county into the Shipping Address tab.
12. Click on the Billing Info tab.
13. Checkmark "billing address is different from primary home address."
14. If another address populates there, leave it. If no other address is listed there, un-checkmark "billing address is different from primary home address."
15. Click "edit patient" to close the box when finished.

16. In the navy Admin Notes box to the right of the patient dashboard, click the pencil to edit the box. Highlight any information that appears above the “\*Initially added during signup” and right-click to cut it.
17. Click the disk icon to save the changes to the box.
18. In the navy Need to Know box of the patient dashboard, click the pencil to edit it. Below the Emergency Contact information, enter down a line then right-click to paste the information from the other box (it should be above “Why I want to be seen.” Please see examples below:

“Before” outlined in red:



“After” outlined in red:



Release from [Practice Name]:

1. From the patient dashboard, click the tags in the black Patient Information box.
2. In the “Release from [Practice Name]” box, look to see who’s date/initial stamp is there that sent the release form to the patient.
3. Un-check the “Release from [Practice Name]” box to show it’s been received and “save and close.”
4. Go back to the Portal to where the consent is open.

5. Title: ROI to [Person/Facility] from [Practice Name] exp [exp date]  
Examples:  
ROI to UHC from CCFM no exp  
ROI to Dr. Daniels from CCFM exp 3-1-16
6. Patient Notification: leave to default (notification not needed).
7. Show in patient's portal.
8. Needs to be reviewed by doctor: choose whomever sent the form to the patient.
9. Click **Save, Unreviewed**

Release to [practice name]:

1. From the patient dashboard, click the tags in the black Patient Information box.
2. In the "Release to [Practice Name]" box, look to see who's date/initial stamp is there that sent the release form to the patient.
3. Un-check the "Release to [Practice Name]" box to show it's been received and "save and close."
4. Go back to the Portal to where the consent is open.
5. Title: ROI from [Person/Facility] to [Practice Name] exp [exp date]  
Examples:  
ROI from HP to CCFM no exp  
ROI from Dr. Daniels to CCFM exp 3-1-16
6. Patient Notification: leave to default (notification not needed).
7. Show in patient's portal.
8. Needs to be reviewed by doctor: choose whomever sent the form to the patient.
9. Click **Save, Unreviewed**

6. In the PPQ, click  to archive the message.