MU Front-Desk Training: Quick Reference Guide

eRX Eligibility

For Objective 2, Measure 1: please make sure to perform an RX eligibility for all walk-in appointments and medicine refills. Please follow the steps below to e-prescribe.

1. At check-in, open the Patient's appointment window from the resource schedule.
2. In the appointment window, click 'Rx Eligibility'.
3. In the Rx Eligibility window, click 'Check Rx Eligibility' and close the Eligibility and Appointment window.

Web-Enable Patients: Timely Electronic Access

Please make sure ALL patients are being asked to join the patient portal. The web-enabling process must be completed from the appointment window only!
Patient can also decline to join the patient portal, but it needs to be documented on the patient's demographics to count for Meaningful Use. Please follow the steps below:

If Patient accepts portal Access:

1. Open the patient appointment window when the patient checks in.
2. Enter the e-mail of the patient in the 'Email' box and Check the 'Web-Enable' box.

If Patient declines portal Access:

1. Open the patient appointment window when the patient checks in.
2. Under 'Visit Status' select 'Checked-in/Arrived' and Click 'Ok'.
3. The 'Web Enable Patients' pop-up window should appear, Check the 'Do not web enable' box.
4. Select the reason why the patient decline portal access in the drop down, then click 'Submit' to complete.

Transitions of Care

Identify Patient as Transition of Care Patient or New Patient

1. From the resource schedule, open the patient's appointment and select 'Arrived' under the visit status drop down.
2. Click the 'Transition of Care' box. NOTE: This should only be done for new Patients to the organization or for Patients who are transitioned back to the practice.