



<b>DOCUMENT NUMBER:</b> RIV-PPP-1015
<b>DOCUMENT TITLE:</b> Walk In Lab Procedure Orders on the Active Requests Tab
<b>DOCUMENT NOTES:</b>

<b>LOCATION:</b> RIV-dft	<b>VERSION:</b> 02
<b>DOC TYPE:</b> RIV PPP	<b>STATUS:</b> Draft

<b>EFFECTIVE DATE:</b>	<b>NEXT REVIEW DATE:</b>
<b>RELEASE DATE:</b>	<b>EXPIRATION DATE:</b>

<b>AUTHOR:</b>	<b>PREVIOUS NUMBER:</b>
<b>OWNER:</b>	<b>CHANGE NUMBER:</b> RIV-CR-0480



# Job Aid



<b>All Lab Service Representatives Scheduling/Registration</b>	Date:	September 2024
	Version:	9

## Lab: Walk In Procedure Orders on the Active Requests Tab

Select lab procedure order(s) and walk in from the Active Requests Tab.

- If there is payment, process payment from the Payment Collection window.
- If there is no payment, complete the check in from the Express Check In window
- If there is no payment due but a payment will be collected, launch the payment collection activity from the Express Check In window.

## Access Patient's Appointment Desk and Walk In Lab Procedure Orders

<p>1. Do one of the following:</p> <ul style="list-style-type: none"> <li>• Click <b>Appts</b> on the main toolbar.</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>• Click <b>Epic &gt; Scheduling &gt; Appts.</b></li> </ul>	
<p>The Patient Lookup window appears.</p> <p>2. Type the patient's <b>Medical Record Number (MRN)</b> in the <b>Name/MRN</b> field.</p> <p>3. <b>Optional:</b> Type other information related to the patient in additional fields if needed.</p> <p>4. Press <b>Enter</b> or click <b>Find Patient</b>.</p> <p>5. Verify the patient information.</p> <p>6. Press <b>Enter</b> or click <b>Accept</b>.</p>	



**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

The patient's Appointment Desk appears.

7. Click the **Active Requests** tab.
8. Select the appropriate order(s).
9. Click **Walk In**.

Future		Past		Active Requests		
Procedure	Spec Source	Ordering Provider	Priority	Creation Date	Schedule Inst	
GLUCOSE, URINE	URINE [1300]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
SPECIFIC GRAVITY, URINE, DIPSTICK	URINE [1300]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
LIPID PANEL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
CBC W AUTOMATED DIFFERENTIAL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		

Walk In Expand



**Tip**

To select multiple orders on the Active Requests tab, do the following:

1. Select the first order.
2. Press the Shift key on your keyboard and select the last order in the list.

The blue bar in front of the procedure order(s) indicates the order is selected.

Future		Past		Active Requests		
Procedure	Spec Source	Ordering Provider	Priority	Creation Date	Schedule Inst	
GLUCOSE, URINE	URINE [1300]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
SPECIFIC GRAVITY, URINE, DIPSTICK	URINE [1300]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
LIPID PANEL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
CBC W AUTOMATED DIFFERENTIAL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		

**Payment Due: Process Payment**


If there is a payment due, the Payment Collection window appears. Process the payment.

The Payment Collection window appears.

1. Click **Collect Payment**.

Total Due Now

10.00

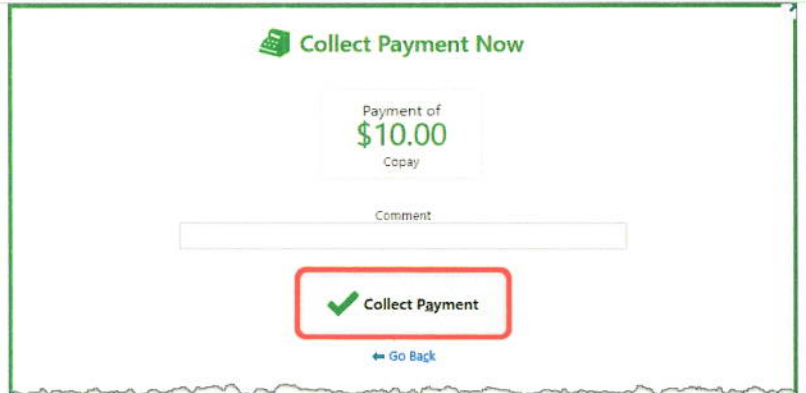


Collect Payment  
\$10.00

**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

2. Click **Collect Payment** again.



The PaymentMate Transaction window appears.

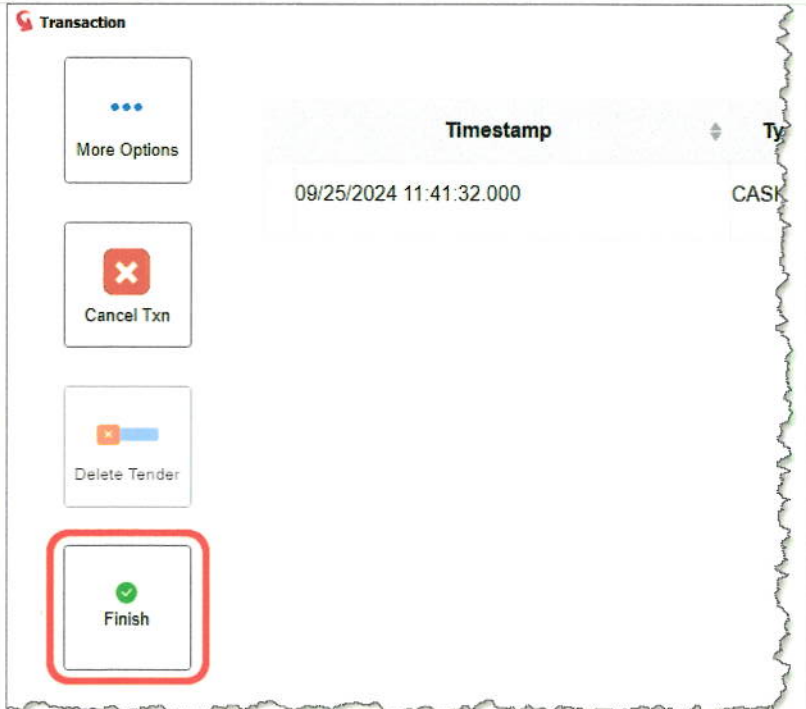
3. Select the form of payment in the **Tender Options** section.



4. Follow system prompts to process the payment.

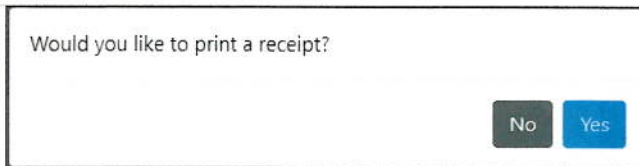
The payment information appears in the PaymentMate Transaction window at the conclusion of the payment process.

5. Click **Finish**.



Confirm with the patient if they would like a receipt.

6. Click **Yes** or **No**.



**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

The Express Check In window appears.

The payment information is updated in the payments section.

**7. Click Check In.**

**Express Check In**

Express Check In

**Demographics**

Permanent  
5231 Brand Blvd  
Burbank, CA 91501

Contact Information  
818-334-7721  
cadence@kp.org

Patient Contacts (1/1)  
Erin Parsons  
Spouse  
951-381-1000  
Notify on admission

**Encounter Guarantor and Coverages**

Hospital Account - 89912221030261  
Outpatient | OPEN | FONTANA MEDICAL CENTER L

Audrey Walrus-Rg [481120505] KFHP 1000/HMO PLAN 16230 (0X668)

Address same as patient  
818-334-7721  
cadence@kp.org  
kp.org Inactive  
Sears Holdings - Full Time

Member ID: xxxxxxxx  
Subscriber ID: xxxxxxxx  
Group: 6543  
Effective from: 1/14/2020  
Relationship to Subscriber: Self

**Payments**

Copay Collected  
10.00 paid

Previous Balance: No previous balance due

**Appointment Information**

LAB at 11:40 AM (10 min)  
Wednesday, September 25, 2024  
ChkLab-Rg Tech in FAMGRTRN LAB  
Check In Time: 11:41 AM

Appointment Type: Outpatient  
Private Encounter: —  
Accident Related?: —  
Appointment Notes: —

Cancel Check In

The processed orders appear on the Finalized Requests tab.

Future	Past	Active Requests	Finalized Requests			
Procedure	Spec Source	Ordering Provider	Priority	Creation Date	Schedule Instructions	
SPECIFIC GRAVITY, URINE, DIPSTICK	URINE [1300]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
LIPID PANEL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
CBC W AUTOMATED DIFFERENTIAL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		

Expand



**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

The scheduled lab appointment appears on the Future tab.

The appointment status is Arrived to indicate that the appointment has been checked in.

Future		Past	Active Requests	Finalized Requests			
W.	Rfl	Status	Encounter Date	Time	Len	Department	Provider
		Arrived	9/25/2024 Wed	11:40 AM	10	FON-LAB*	Chklab-Rg, Techa

Check In   Check Out   Cancel Check In   Edit Appointment Info   Edit Appointment Notes   Cancel/Reschedule

**No Payment Due – Payment will not be Processed**

If there is no payment due, the Express check in window appears.

Continue the check in process if a payment will not be processed.

1. Click **Check In** to complete the check in process.

**Express Check In**

Express Check In

**Demographics**

Permanent  
5231 Brand Blvd  
Burbank, CA 91501

Contact Information  
818-334-7721  
cadence@kp.org

Patient Contacts (1/1)  
Erin Parsons  
Spouse  
951-381-1000  
Notify on admission

**Encounter Guarantor and Coverages**

Hospital Account - 89912221030265  
Outpatient | OPEN | FONTANA MEDICAL CENTER L

Zoe Tiger-Rg [222934585]  
Address same as patient  
818-334-7721  
cadence@kp.org  
kp.org Inactive  
Target Corporation - Full Time

E-VST MBR KP COLORADO/KP INTRGNL COLORADO  
Member ID: xxxxxxxx  
Subscriber ID: xxxxxxxx  
Group: —  
Relationship to Subscriber: Self  
Effective for all dates

**Payments**

Visit Payment  
No Payment Due

Previous Balance  
No previous balance due

**Appointment Information**

LAB at 1:10 PM (10 min)  
Wednesday September 25, 2024  
Chklab-Rg, Techa in FAMRGTRN LAB  
Check In Time: 1:05 PM

Appointment Type: Outpatient  
Private Encounter: —  
Accident Related?: —  
Appointment Notes: —

**Questionnaire**

INTERPRETER SERVICES QUESTIONNAIRE  
CORONAVIRUS SCREENING QUESTIONNAIRE-SCAL

Everything checks out!

Cancel   **Check In**

**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

The processed orders appear on the Finalized Requests tab.

Future		Past		Active Requests		Finalized Requests	
Procedure	Spec Source	Ordering Provider	Priority	Creation Date	Schedule Instructions		
SPECIFIC GRAVITY, URINE, DIPSTICK	URINE [1300]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021			
LIPID PANEL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021			
CBC W AUTOMATED DIFFERENTIAL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021			

Expand

The scheduled lab appointment appears on the Future tab.  
  
The appointment status is Arrived to indicate that the appointment has been checked in.

Future		Past		Active Requests		Finalized Requests	
W.	Rfl	Status	Encounter Date	Time	Len	Department	Provider
		Arrived	9/25/2024 Wed	1:10 PM	10	FON-LAB*	Chklab-Rg, Techa

Check In   Check Out   Cancel Check In   Edit Appointment Info   Edit Appointment Notes   Cancel/Reschedule

**No Payment Due: Process Payment**

- If there is no payment due, the Express Check In window appears.
- If a payment will be processed, launch payment process from the Express Check In window.
1. Click **Payment Collection**.

**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

The screenshot shows the 'Express Check In' interface. The 'Payments' section is highlighted with a red box, showing a 'Payment Collection' button. The 'Appointment Information' section shows a lab appointment at 1:10 PM on Wednesday, September 25, 2024, at ChLab-Rg, Techs In FAMRGTRN LAB. The 'Questionnaire' section includes 'INTERPRETER SERVICES QUESTIONNAIRE' and 'CORONAVIRUS SCREENING QUESTIONNAIRE-SCAL'. A green checkmark icon and the text 'Everything checks out!' are visible in the top right corner.

The Payment Collection window appears.

2. Click **Add Visit Payment** to enable the Collecting fields.

The screenshot shows the 'Payment Collection' window. It displays a table for 'This Visit' with the following data:

Today - Lab Visit	Pay Now	Edit	Due
1:10 PM Laboratory P/F #222934585 • Account #89912221030265 VST MBR KP COLORADO - KP INTRGNL COLORADO	+ Add Copay	+ Add Prepay	0.00
<b>Total</b>			<b>0.00</b>

A red box highlights the 'Add Visit Payment' button, which features a green plus sign icon.

3. Type the payment amount in the **Due** section and press **Tab**.

The amount populates in the Collecting fields.

4. Click **Collect Payment**.



### All Lab Service Representatives Scheduling/Registration

### Lab: Walk In Procedure Orders on the Active Requests Tab

**Payment Collection**  
This Visit

**Today - Lab Visit**

1:10 PM Laboratory  
P/F #222934565 • Account #89912221030265  
VST MBR KP COLORADO - KP INTRGNL COLORADO

Pay Now	Save	Cancel	Due	Collecting
Copay			10.00	10.00
Prepay			0.00	0.00
<b>Total</b>			<b>10.00</b>	<b>10.00</b>

Previous Balance  
No Coverage

Reason Not Collecting

Total Due Now **10.00**

**Collect Payment \$10.00**

Cancel Check In

5. Click **Collect Payment**.

**Collect Payment Now**

Payment of  
**\$10.00**  
Copay

Comment

**Collect Payment**

Go Back

The PaymentMate Transaction window appears.

6. Select the form of payment in the **Tender Options** section.

7. Follow system prompts to process the payment.

Tender Options

E-Wallet Voucher Cash Card Ecash Token E-Check Check

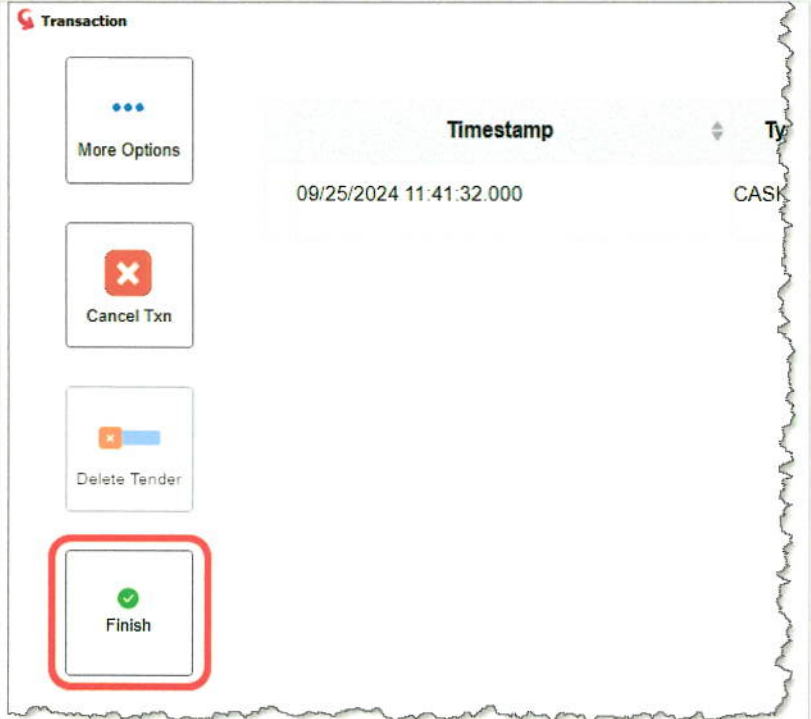
Cash Payments Must Be Tendered Last

**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

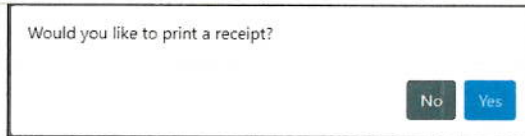
The payment information appears in the PaymentMate Transaction window at the conclusion of the payment process.

8. Click **Finish**.



Confirm with the patient if they would like a receipt.

9. Click **Yes** or **No**.



The Express Check In window appears.

The payment information is updated in the Payments section.

10. Click **Check In**.

**All Lab Service Representatives  
Scheduling/Registration**

**Lab: Walk In Procedure Orders on the Active Requests Tab**

**Express Check In**

**Demographics**

Permanent  
5231 Brand Blvd  
Burbank, CA 91501

Contact Information  
818-334-7721  
cadence@kp.org

Patient Contacts (1/1)  
**Erin Parsons**  
Spouse  
951-361-1000  
Notify on admission

**Encounter Guarantor and Coverages**

Hospital Account - 89912221030265  
Outpatient | OPEN | FONTANA MEDICAL CENTER L

**Zoe Tiger-Rg [222934686]**  
Address same as patient  
618-334-7721  
cadence@kp.org  
kp.org Inactive  
Target Corporation - Full Time

**E-VST MBR KP COLORADO/KP INTRGNL COLORADO**  
Member ID: xxxxxxxx  
Subscriber ID: xxxxxxxx  
Effective for all dates

**Payments**

Copay **Collected**  
10.00 paid

Previous Balance  
No previous balance due

**Appointment Information**

**LAB at 1:10 PM (10 min)**  
Wednesday September 25, 2024  
Chklab-Rg, Tech In FAMRGTRN LAB  
Check In Time: 1:08 PM

Appointment Type: Private Encounter  
Outpatient  
Accident Related?:  
Appointment Notes:

**Questionnaire**

INTERPRETER SERVICES QUESTIONNAIRE  
CORONAVIRUS SCREENING QUESTIONNAIRE-SCAI

Everything checks out!

Cancel **Check In**

The processed orders appear on the Finalized Requests tab.

Future	Past	Active Requests	<b>Finalized Requests</b>			
Procedure	Spec Source	Ordering Provider	Priority	Creation Date	Schedule Instructions	
SPECIFIC GRAVITY, URINE, DIPSTICK	URINE [1300]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
LIPID PANEL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		
CBC W AUTOMATED DIFFERENTIAL	BLOOD [1212]	CADENCE, PROVIDER [2999299]	Routine	01/08/2021		

Expand

The scheduled lab appointment appears on the Future tab.

The appointment status is Arrived to indicate that the appointment has been checked in.

Future	Past	Active Requests	Finalized Requests					
W	Rfl	Status	Encounter Date	Time	Len	Department	Provider	
		<b>Arrived</b>	9/25/2024	Wed 1:10 PM	10	FON-LAB*	Chklab-Rg, Tech	

Check In Check Out Cancel Check In Edit Appointment Info Edit Appointment Notes Cancel/Reschedule





**Tip**

For more information on **processing payments**, go to <http://myhelp.kp.org> and search for the following Keywords: **process payments**.

Regional Parent Document Reference Number: SCPMG-PPP-0459 Rev: 02