



# KAISER PERMANENTE®

<b>DOCUMENT NUMBER:</b> RIV-PPP-1016
<b>DOCUMENT TITLE:</b> Check In a Scheduled Lab Appointment
<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



Service Representatives	Date:	August 2024
Scheduling/Registration	Version:	5

## Check In a Scheduled Lab Appointment

Link procedure orders to the scheduled lab appointment and check in the patient.

### Access Patient's Appointment Desk

1. Do one of the following:

- Click **Appts** on the Main toolbar.

OR

- Click **Epic > Scheduling > Appts.**



The Search for a Patient window appears.

2. Type the patient's Medical Record Number (MRN) in the **Name/MRN** field.

3. Click **Find Patient** or press **Enter**.

4. Verify the patient information.

5. Click **Accept**.



### Link Procedure Order(s) to Appointment and Check In Patient

The Appointment Desk appears.

1. Select the lab appointment.

2. Right-click and select **Link Requests**.



**Service Representatives  
Scheduling/Registration**

**Check In a Scheduled Lab Appointment**

The Link Appointment to Requests window appears.

3. Click **Show all available requests** if the orders are not visible.
4. Select the appropriate procedure order(s).
5. Click **Accept**.

### Link Appointment to Requests

**Appointment Information**

Name:	Walrus-Rg, Audrey	MRN:	200015010019
Date:	4/16/2024	Needs Interp:	<b>No [2]</b>
		Status:	Sch

Linked	Procedure	Spec Source	Ordering Provider	Priority	Creation Date	Schedule Instructions
<input checked="" type="checkbox"/>	CBC W AUTOMAT...	BLOOD [1212]	CADENCE, PROVIDER [299...	Routine	01/08/2021	
<input checked="" type="checkbox"/>	LIPID PANEL	BLOOD [1212]	CADENCE, PROVIDER [299...	Routine	01/08/2021	
<input checked="" type="checkbox"/>	SPECIFIC GRAVI...	URINE [1300]	CADENCE, PROVIDER [299...	Routine	01/08/2021	
<input checked="" type="checkbox"/>	GLUCOSE, URINE	URINE [1300]	CADENCE, PROVIDER [299...	Routine	01/08/2021	

Show all available requests
Expand

The Appointment Desk appears.  
The orders are linked to the lab appointment.

6. Verify the lab appointment is selected.
7. Click **Check In**.

W.	Rfl	Status	Encounter Date	Time	Len	Department	Provider	Visit Type
		Sch	4/16/2024 Tue	2:30 PM	10	FON-LAB*	Chklab-Rg, Techa	LAB [41]
		Sch	4/17/2024 Wed	12:30 PM	15	FOFAM	Month, Doctor-Rg	OFFICE VISIT FOLLOW UP 15 MIN [96T]
		Sch	4/18/2024 Thu	12:30 PM	15	FOFAM	Month, Doctor-Rg	OFFICE VISIT FOLLOW UP 15 MIN [96T]
		Sch	4/19/2024 Fri	12:30 PM	15	FOFAM	Month, Doctor-Rg	OFFICE VISIT FOLLOW UP 15 MIN [96T]

Check Out
Cancel Check In
Edit Appointment Info
Edit Appointment Notes
Cancel/Reschedule
Copy Into Book It

**Process Payment**

The Payment Collection window appears.

1. Click **Collect Payment**.

Total Due Now

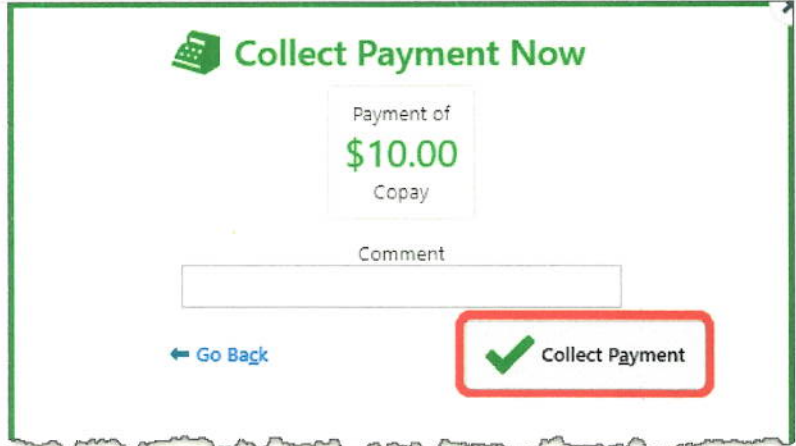
10.00

**Collect Payment**

\$10.00



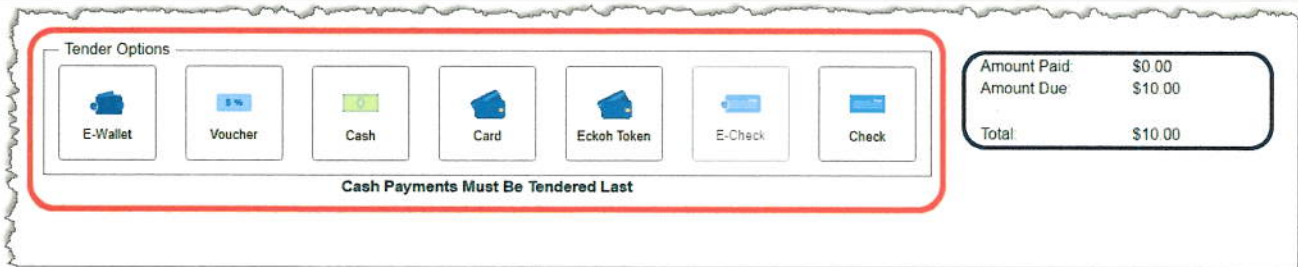
2. Click **Collect Payment** again.



The PaymentMate Transaction window appears.

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

4. Follow system prompts to process the payment.

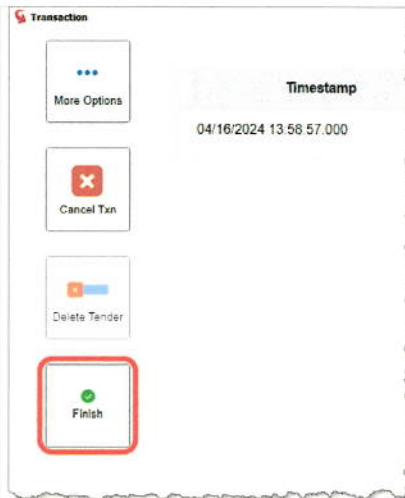


**Tip**

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

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

5. Click **Finish**.



**Service Representatives  
Scheduling/Registration**

**Check In a Scheduled Lab Appointment**

6. Confirm with the patient if they would like a receipt and click **Yes** or **No**.

Would you like to print a receipt?

The Check In window appears.

7. Click **Check In**.

Complete the check in process.

The Appointment Desk appears.

The appointment status changes to **Arrived** to indicate the patient is checked in.

Future		Past		Finalized Requests						
W.	Rfl	Status	Encounter Date	Time	Len	Department	Provider	Visit Type		
		Arrived	4/16/2024	Tue 2:30 PM	10	FON-LAB*	Chklab-Rg, Techa	LAB [41]		
		Sch	4/17/2024	Wed 12:30 PM	15	FOFAM	Month, Doctor-Rg	OFFICE VISIT FOLLOW UP 15 MIN [96T]		
		Sch	4/18/2024	Thu 12:30 PM	15	FOFAM	Month, Doctor-Rg	OFFICE VISIT FOLLOW UP 15 MIN [96T]		

Regional Parent Document Reference Number: SCPMG-PPP-0458 Rev: 02