Patient Connect:
Document Requests

Document requests may be sent to patients with a scheduled appointment. Facilities may request a driver's license, insurance card (front and back), and consent forms requiring patient signature. A Pre-Registration form may be sent to the patient to confirm basic demographic information and allow for changes to be made. All submitted documents will be displayed within Patient Connect and Electronic File Management under the Profile Docs tab.

To initiate the request:

- Select the **Documents Requested** icon in the Documents column on the Scheduled Appointments tab.
- A list of documents that may be requested will be displayed.
- Select the checkbox next to the document to be requested.
- Select Send Requests **Send Requests** once all selections have been made.
- This will then send a request to the patients via email and/or text message.

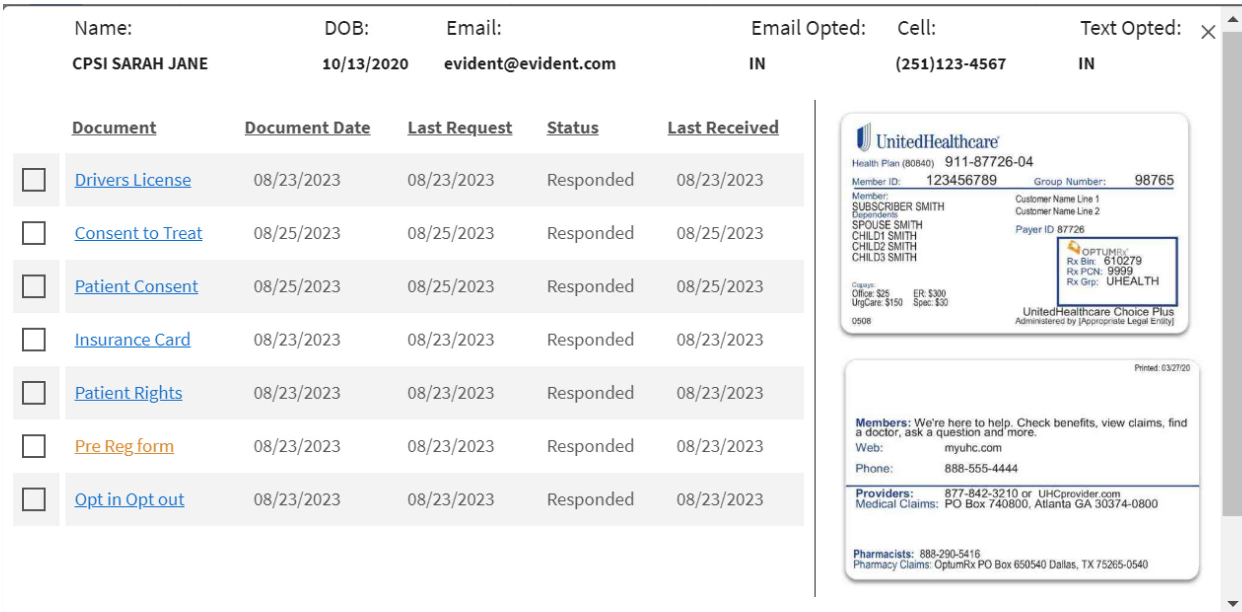
Patients will then receive an email with a link to submit their documents.

Once documents have been requested for a patient, the Documents Requested icon will display a clock.

Viewing Documents

To view documents the patient has submitted:

- Select the **Documents Requested** icon.
- A blue dot next to the icon will reflect that the patient has submitted requested information.



Documents

Below are descriptions of the columns within the Documents pop-up.

- **Document Date:** Reflects the date from Electronic File Management when the document was obtained by the facility. This includes images uploaded directly to Electronic File Management as opposed to Patient Connect.
- **Last Request:** Reflects the date the document was sent to the patient/requested by the facility.
- **Status:** Displays the status of the document: Sent, View, or Responded.
- **Last Received:** The date the document was uploaded via Patient Connect.

NOTE: *Patient submitted documents will display in Electronic File Management, the Profile Docs tab on the profile and to the account once it has been created and linked to the appointment.*

If wanting to request a document again, select the appropriate checkbox in the Document column and select Send Requests **Send Requests**.

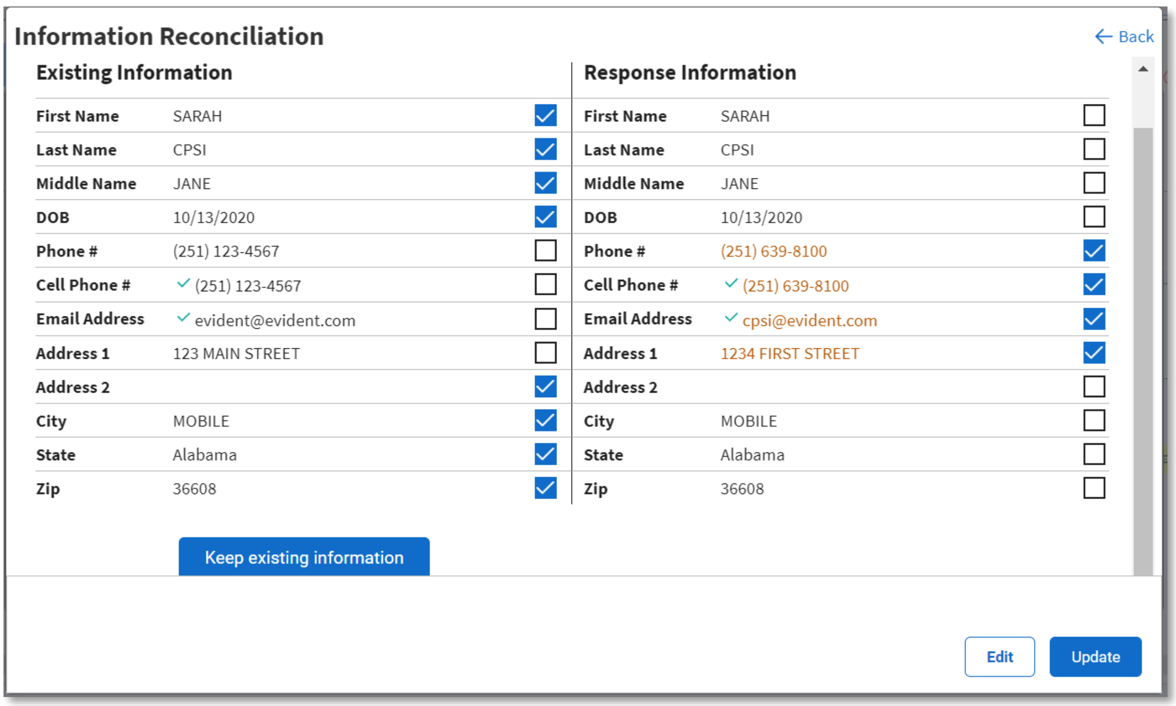
To view a document, select the **Document title** from the Documents column. It will then display on the right side of the screen.

Pre-Registration Form

If a Pre-Registration Form was requested, an orange dot next to the Document icon will indicate that the patient has submitted the form with updated information. The orange dot is displayed to signify the document needs to be reconciled.

To verify and update the demographics:

- Select the form from the view documents screen.
    - The orange display indicates the need for reconciliation.

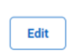


Information Reconciliation

- The information submitted by the patient will be displayed under **Response Information** on the right side.

- Existing profile information will be displayed under **Existing Information** on the left side.

- Information that is different than what is on the patient profile will automatically be selected on the **Response Information** side and will display in orange.

- If needing to edit the information submitted by the patient select 

Edit.

- Once all needed fields are selected, select Update **Update** to update the patient's profile with the new information.

- A copy of the Pre-Registration form will be saved in Electronic File Management for future reference, if needed.

- Select Keep existing information **Keep Existing Information** to keep the patient profile as is and continue with completing the reconciliation.