Taking a Picture of Insurance Cards in the Check-In App

07/24/2024 9:31 pm EDT

Your patients can take pictures of their insurance cards (front and back) right from the DrChrono check-in app.

1. To take a picture of the insurance card, the check-in app must be in the onboarding section. Select the patient from the appointment list and tap **Start Onboarding**.

10:36 AM Tue Sep 28 Filters Today	, č,	Patient Notes	CDS Matches (1)	Flags (4)		€ 83% [6] Q _
Q Search Appointmer	nt Iarris Exam 1	L P C	enny (Jen) Harris (Fe hone (650) 215-6343 hart ID HAJE000001	male 41 02/11/19	980)	This is a Sample Patient In the Main Menu, you can Add Patients, Customize Workflow and turn off Sample Data in Settings.
V			lew Appointment Elig	jibility		Start Onboarding
		No Appoint	ment Profile		Appointment S	Status
		09/28 09:40AM	Exam 1		James Smith	
		Payment	Co-Pay	Add Payment	Billing Status	
				Appointment	Notes	
		R	Tap here to create notes			
dr chrono	v3.1.5					

2. Hand over the iPad so the patient can start filling out their information.

Staff Unlock	Please Hand th	ne iPad to:		START
	Patient Name Jenny (Jen) Harris	Onboarding Language English Span	ish	
	Consent forms for this appointment			
	HIPAA Data Use Agreement		>	
	No Show Policy		>	

3. There's now a section where the patient can take pictures of their insurance cards. They need to tap the pencil icon (



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			Linglish	Lopuno			
	Primary Insurance						1
	Insurance Company Aetna		Insurance ID 12345678ABC		Group Nu 98765432	mber 21	
	Plan Name		Patient Student St	atus			
	Subscriber Name		Relation to Patient		Date of Birth	Social Secur	ity #
	Secondary Insurance	•					1
	Insurance Company		Insurance ID		Group Nu	mber	
	Plan Name		Patient Student St	atus			
	Subscriber Name		Relation to Patient		Date of Birth	Social Secur	ity #
	Insurance Card Photo	os					1
	Primary Insurance Care	d		Secondar	y Insurance Card	I	
	Front	Back		Front	Ba	ick	
			Finish Ch	eck-In			

4. Click on each box to take a picture of the front/back first/second insurance card using the iPad's camera.

10:41 AM Tue Sep 28	Back	Insurance Card Photos	Next	হ ৪2% 🔲
	Primary Insurance Card	Secondary Inst	urance Card	
	Front Tap Here to Take F	Photo Tap H	Here to Take Photo	
	Back Tap Here to Take I	Photo Tap H	Here to Take Photo	

5. Line up the insurance card with the box on the screen and snap the photo!

×			
	Subcorber Name: JOHN DOE Mentification Namber: ZOF 1224565789 Group Number: 122456 Coverage Date: 0910108 SINGLE	Office Copay \$25 Emergency Copay \$106 RJ. Senetic Copay \$25 RJ. Senetic Copay \$25 RJ. Senetic Copay \$50\$\$106 RoBit: 611055 RoBit: 611055	
	Position	ppo po R	

6. Click the **Save** button if the picture looks good.



7. Make sure to get a picture of the back of the insurance card with the same steps as the front.

			Back Insurance	Card Photos Next	
		Primary I	nsurance Card	Secondary Insurance Card	
		Front		Front	_
			BlueCross BlueShield	BlueCross BlueShield	
		JOHN Mentic XOF1:	DOE tion Number 13456789	Subscriber Name. JOHN DOE Identification Number:	
		Covera	X Pr	eview Save	10 00 5
		E	Anthem.	www.anthem.com/ca	05300 D.
		Back	MEMBERS: When submitting inquiries always include your member number from the face of this card. Possession or use of this card does not	Member Services 844-898-5148 Nurse Line 800-700-0197	
MEMBERS: When submitting inquiries always include your member number from the face of this include your member number from the face of this	www.anthem.com/ca Member Services 844-898-5148 Nurse Line 800-700-0197 era3.051.2460	Manatasi men kada pada pada garanne paga Processos al ante pada al ante pada pada pada pada pada pada pada pad	guarantee payment. PROVIDERS: Please submit claims to your local Blue Cross and/or Blue Shield Plan. To ensure prompt claims processing, include the 3-digit	Pharmacist Services 833-201-2460 Pre-Authorization Review 800-274-7767 Contact 844-898-5148	
Guarantee päyment. guarantee päyment. Bille Consa and/or Bille Sheld Plan. To ensue prompt claims proceeding the patient's identi- science patient and the patient's identi- science public and and and and and and and and and science public and and and and and and and and science public and and and and and and and and and science public and and and and and and and and and and and and and and and and and and and	Pre-Authorization Review 800-274-7767 Contact 844-898-5148		fication number listed on the front of this card. For services rendered in CA, file medical claims to P.O. BOX 60007 LOS ANGELES, CA 90060	Anthem Blue Cross is the trade name of Blue Cross of California. Independent licensee of the Blue Cross Association.	
Figu services undered in CA, file medical claims to: PO_BOX 60007 LOS ANGELES, CA 90060	Anthem Blue Cross is the trade name of Blue Cross of California. Independent licensee of the Blue Cross Association.				
Position	card in frame				
			Reta	(e Photo	

8. And you're done!



FAQ

Once the patient has taken the pictures, where do we see them on the DrChrono EHR web?

You can see these insurance card photos under the Patient Demographics Insurance tab.

+ Add new patient		Important	Demographics	Insurance	es Autho	rizations Si	moking Sta	atus Flags	Balance	e onpatient Payments
Demographics		✓ Sufficient	patient demograp	ohics to bill	insurance.	Matto Acc	ident 🏴	Gestational D	iabetes	Must lay down for blood dra
Appointments		Primary Ins	Secondary Ins	Tertiary Ir	ns Auto A	Accident Wo	orker's Con	np Durable I	Aed Eqpt	
Clinical Dashboard		Secondar	y Insurance	Save to	Insuranc	ce History	Patier	nt Insurance	Histor	у
Documents			Subscriber is the Pa	atient 🔽	Insured persor	n is the same pers	son as the P	atient		
Eligibility			Insurance Com	ралу			+			
Tasks	0		Carrier Pay	/er ID			*print	ted on back of insu	rance card	
Problem List	0		Insurance ID Nu	mber						
Medication List	0		Insurance Group N	Vame			*if ava	ailable		
Send eRx			Insurance plan	name			*if ava	ailable		
Allergy List	0		Insurance plan	type			✓ *if av	vailable		
Drug Interactions	0	Insura	ince claim office nu	mber			*if ava	ailable		
CQMs		Second	lary insurance type	code			✓ *requ	uired for Medicare	plans only	
Intake Data			Card issued	date		*Required for	r checking el	ligibility of CA Med	icaid	
Lab Orders		Sec	condary Insurance N	Notes						
Immunizations							11			
Growth Charts			Insurance Photo	Front Cur	rrently: clinic	al/2021/09/a	7b9eeee-5	5ce6-4197-8591	-2bbd2bd	1bc3d.jpg 🗌 Clear
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Communication					2. V.	BlueSh	nield			
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					Anthem.		, chobert			
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Can my patients use their webcam with OnPatient to take a photo of their insurance card?

At this time OnPatient does not have this functionality.

What if I want to have our staff take the photos of the insurance card? Where can they do this?

If you open a Patient Chart in the iPad EHR app and tap on the **Patient Information** tab, you can take the pictures yourself.

12:01 PM Tue Sep 28	奈 1 74% □)
Close	Q +
Visit Patient History	Jenny (Jen) Harris (Female 41 02/11/1980), cc N/A Vitals Tools
Patient Information Patient Information	onpatient: On Health 30-Day Snapshot Audit Logs
Face Sheet	Primary Insurance Save History
Appointment List	Insurance Card Front Insurance Card Back
Problems	BlueCross BucShield Machine - Buckmet - Member Services www.anthem.com/ca Member Services www.anthem.com/ca Member Services Subcripter Nume
Labs	JOHIN DOE Montfiction Number: XOF 123456789 Group Number: Coverage Date: 09/01/08 Emergency Copay \$20 Emergency Copay \$100 Emergency Copay \$100 Em
Growth Charts	RX Generic Copay s25 RX Brand Copay s50s100 RX Brand Copay s50s100 Rx Bink: 011550 RxPRAK: 011550 RxPCAK: LDR RxP
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	Company
	Insurance ID
	Group Number

Plan Name