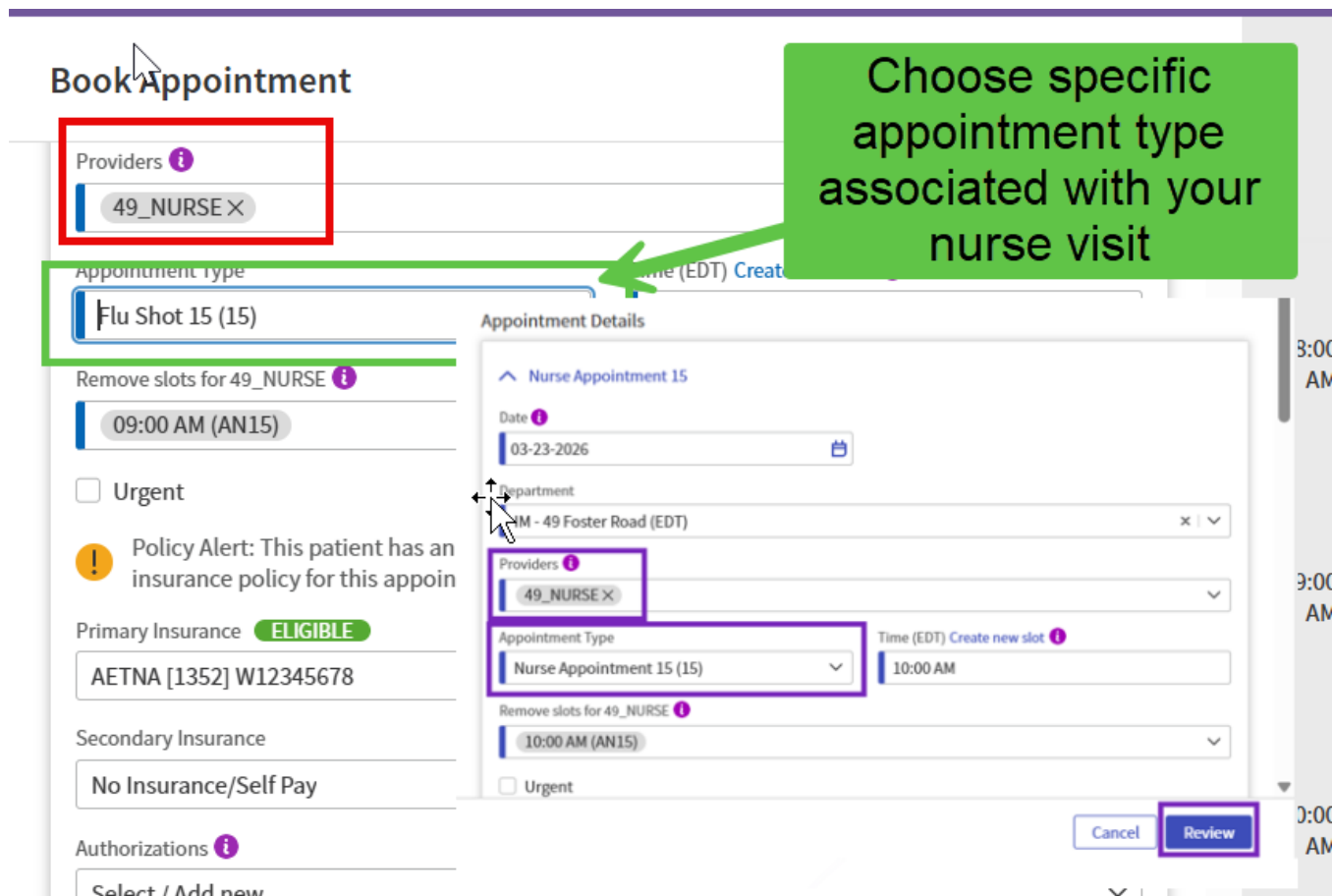


Premier Nurse Visit Workflow

This workflow document describes workflow for nurse visits. The workflow includes scheduling a nurse visit on a non-person provider schedule with the correct appointment type, check in, documentation sign off, change entry, check out, and billing.

Scheduling a Nurse Visit

Schedulers need to be sure to schedule patients on the **non-person nurse provider schedule** and **select the nurse visit appointment type**. Once that is completed, they will proceed to complete the scheduling per the athena standard workflow process.



Book Appointment

Providers *i*

49_NURSE X

Appointment type

Flu Shot 15 (15)

Remove slots for 49_NURSE *i*

09:00 AM (AN15)

☐ Urgent

! Policy Alert: This patient has an insurance policy for this appointment

Primary Insurance **ELIGIBLE**

AETNA [1352] W12345678

Secondary Insurance

No Insurance/Self Pay

Authorizations *i*

Select / Add new

Appointment Details

Nurse Appointment 15

Date *i*

03-23-2026

Department

IM - 49 Foster Road (EDT)

Providers *i*

49_NURSE X

Appointment Type

Nurse Appointment 15 (15)

Time (EDT) Create new slot *i*

10:00 AM

Remove slots for 49_NURSE *i*

10:00 AM (AN15)

☐ Urgent

Cancel Review

Choose specific appointment type associated with your nurse visit

Check-In

1. Find the patient you want to check in on the **Calendar**.
2. **Identify if the patient has completed self-check in** online by looking at the patient's name on the calendar. If you see "Self-Check in Completed" that means they have completed e-check in online and may have filled out some or all the necessary forms for this appointment online.

Week of July 14 - 20, 2024

View by: Department | Go to | ROOM STATUS

SUN 7/14 MON 7/15 TUE 7/16 WED 7/17 THU 7/18 TODAY SAT 7/20

9:00 AM 10min	EB	Edward Beer 64yo M 04-10-1960	
9:10 AM	OPEN		
9:15 AM 15min	ED	Eric Davis 58yo F 06-21-1966	
9:20 AM 20min	JD	Justine Dach 44yo M 10-09-1979	Self Check-in Completed DTS-SSU
9:25 AM 45min	DC	Dameon Crist 43yo M 07-08-1981	
9:30 AM	OPEN		

- If you DO NOT see “Self Check-in Completed” then you will want to send the patient a link to complete their e-check in online BEFORE you check them into athena.

Week of July 14 - 20, 2024

View by: Department | Go to | ROOM STATUS

SUN 7/14 MON 7/15 TUE 7/16 WED 7/17 THU 7/18 TODAY SAT 7/20

9:00 AM 10min	EB	Edward Beer 64yo M 04-10-1960	
9:10 AM	OPEN		
9:15 AM 15min	ED	Eric Davis 58yo F 06-21-1966	
9:20 AM 20min	JD	Justine Dach 44yo M 10-09-1979	Self Check-in Completed
9:25 AM 45min	DC	Dameon Crist 43yo M 07-08-1981	

This patient has NOT completed self check in because this is blank

If self-check in has been completed **SKIP TO STEP 3**

TO SEND PATIENT SELF CHECK-IN LINK:

Clinical Staff: Hover over the patient name you will see a door to the right of their name. This is what you would click on to start the check-in process.

Front Desk Staff: Click on the patient's name on the calendar to initiate the check in process

Week of July 14 - 20, 2024

View by: Department | Go to | ROOM STATUS

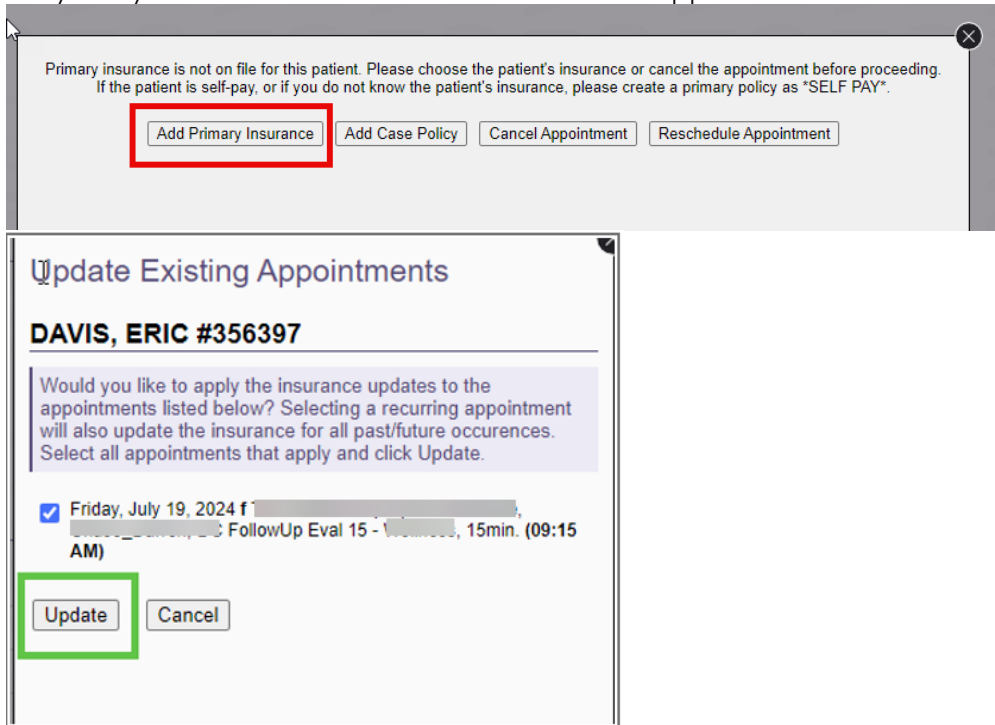
SUN 7/14 MON 7/15 TUE 7/16 WED 7/17 THU 7/18 TODAY SAT 7/20

Darren Chase, DC			
9:00 AM 10min	EB	Edward Beer 64yo M 04-10-1960	
9:10 AM	OPEN		
9:15 AM 15min	ED	Eric Davis 58yo F 06-21-1966	
9:20 AM 20min	JD	Justine Dach 44yo M 10-09-1979	
9:25 AM 45min	DC	Dameon Crist 43yo M 07-08-1981	
9:30 AM	OPEN		
10:10 AM 60min	HT	Helen Test 73yo F 09-21-1950	New Patient Eval 60
10:20 AM		Fiona McKenna	

If you are in clinical person you will see the door. This is how you would start check in.

If you are a Front Desk / Administrative person you will not see the door, you simply click on the patient on the calendar (anywhere in the light blue box)

If the patient does not have insurance on their account yet, athena will prompt you to add insurance and ask you if you want to add this insurance to future appointments:



Primary insurance is not on file for this patient. Please choose the patient's insurance or cancel the appointment before proceeding.
If the patient is self-pay, or if you do not know the patient's insurance, please create a primary policy as "SELF PAY".

Add Primary Insurance Add Case Policy Cancel Appointment Reschedule Appointment

Update Existing Appointments

DAVIS, ERIC #356397

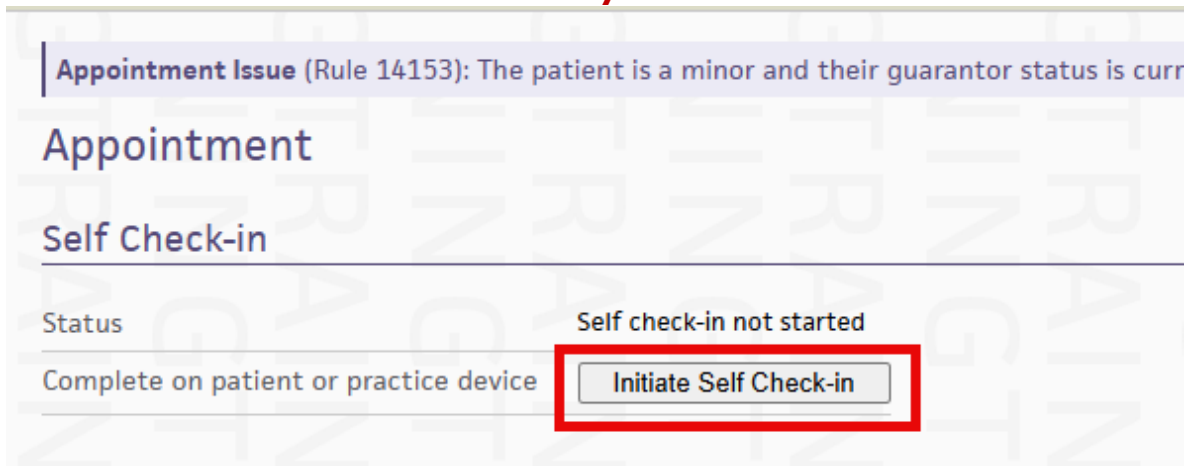
Would you like to apply the insurance updates to the appointments listed below? Selecting a recurring appointment will also update the insurance for all past/future occurrences. Select all appointments that apply and click Update.

☒ Friday, July 19, 2024 11:15 AM - 12:00 PM FollowUp Eval 15 - 15min. (09:15 AM)

Update Cancel

Once entered athena will bring you to the check in screen

DO NOT click Start Check-in yet. Click on "Initiate Self Check-In"



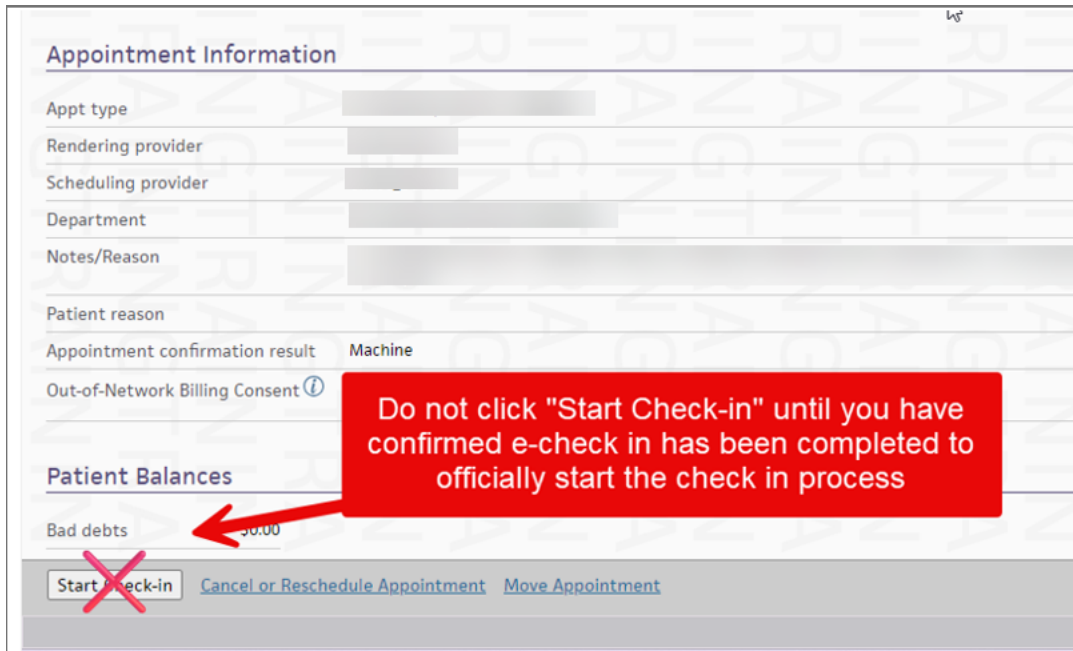
Appointment Issue (Rule 14153): The patient is a minor and their guarantor status is current

Appointment

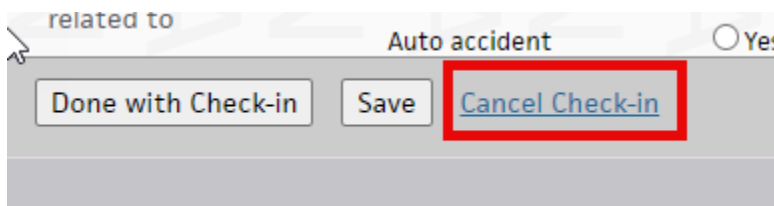
Self Check-in

Status Self check-in not started

Complete on patient or practice device **Initiate Self Check-in**



****Please note:** If you accidentally click on Start check-in you can click on the “Cancel Check-in” button to cancel check-in (see below) and bring you back to the previous page to send the self check-in link to the patient***



Once you click on the “initiate Self Check-in” link a box will pop up and you can send the link to the patient via a text or the patient can scan the QR CODE:

Initiate Self Check-in



Unable to generate a QR code for this appointment.
Try again.

Enter or confirm the patient's mobile number below. Double check to make sure the patient has a smart phone. This modal will close once the link is successfully sent.

Mobile phone number

OR

(555) 217-5964

☐ Change the phone number on file in the patient's record.

Confirm & Send Link

Once the patient has completed self check-in, it will reflect on the calendar:

9:15 AM 15min	ED	Eric Davis 58yo F 06-21-1966	
9:20 AM 20min	JD	Justin Dach 44yo M 10-09-1979	Self Check-in Completed

IF Self Check-In Completed – STAR HERE

- You can start your check-in process by clicking on the patient's name (or the door to the right of their name if you are in clinician mode).

You can see what the patient has filled out online in the check-in screen and can print any documents they have completed from here:

Self Check-in

Self check-in completed (in-office)

Relationship to Patient	Completed	Self
Patient Information	Completed	Audit history
Patient Portal	Completed	Registered 07/18/2024
Statements	In progress	
Billing	Not required	
Consent Forms	Completed	- Policy - HIPAA, Consent, Release of Info, Assignment of Benefits - Combined Signed print - Policy - Payment Signed print
Health History	Completed	Health History for New Patients: Completed Print
Screeners	Not required	

Appointment Information

- On the check-in screen, **change the rendering provider** from the non-person Nurse **to a person provider**. This will usually be the patient's usual provider or the provider the claim will be billed under. Once the rendering provider is selected, it will automatically fill in the supervising provider dropdown.

athenaOne® Calendar Patients Claims Financials Reports Quality Apps Support

AI Anna IM-1-SP
30yo F | 12-17-1995 | #100040 | E#100040
ENG

Contact: M (618)785-9684 +1 | Appointments: Next Nurse Appoi... +1 | Provider: CINDY HA, FNP | Insurance: Primary *SELF PAY* | Medent Legacy Patient ID: N/A | eCW Legacy: N/A

Check-in Intake Exam Sign-off Checkout Nurse Appointment 15 Arrived

Patient Actions: Registration Messaging Scheduling Billing Clinicals Communicator Other

Check-in

Self Check-in

Self check-in is not currently being used for this appointment. (out-of-office)

Appointment Information

Appt type: Nurse Appointment 15 (15 min) ▼

Scheduling provider: 49_NURSE ▼

Supervising Provider: ▼ (the claim typically will be billed under this provider's credentials)

Primary insurance: *SELF PAY* [0] ▼

Secondary insurance: No Insurance/Self Pay ▼

Dept: IM - 49 Foster Road ▼

Rendering provider: 49_NURSE ▼

Must change Rendering Provider to a person provider

athenaOne® Calendar Patients Claims Financials Reports Quality Apps Support

AI Anna IM-1-SP
30yo F | 12-17-1995 | #100040 | E#100040
ENG

Contact: M (618)785-9684 +1 | Appointments: Next Nurse Appoi... +1 | Provider: CINDY HA, FNP | Insurance: Primary *SELF PAY* | Medent Legacy Patient ID: N/A | eCW Legacy: N/A

Check-in Intake Exam Sign-off Checkout Nurse Appointment 15 Arrived

Patient Actions: Registration Messaging Scheduling Billing Clinicals Communicator Other

Check-in

Self Check-in

Self check-in is not currently being used for this appointment. (out-of-office)

Appointment Information

Appt type: Nurse Appointment 15 (15 min) ▼

Scheduling provider: 49_NURSE ▼

Supervising Provider: ▼ (the claim typically will be billed under this provider's credentials)

Primary insurance: *SELF PAY* [0] ▼

Secondary insurance: No Insurance/Self Pay ▼

Dept: IM - 49 Foster Road ▼

Rendering provider: 49_NURSE ▼

Supervising provider should be entered here

Add the ordering provider here

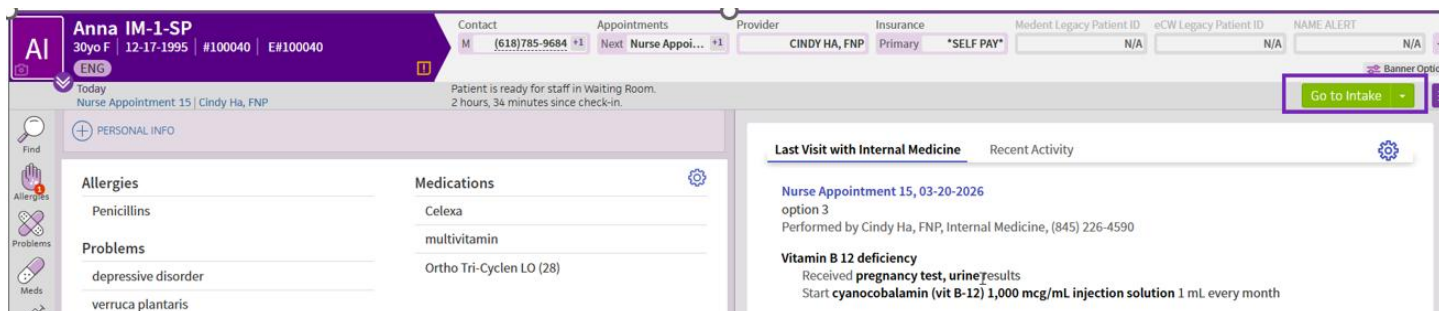
*****Please note***** It is very IMPORTANT to change the rendering provider otherwise athena will skip the clinical sections of the encounter and go straight to checkout. If check-in staff DOES NOT change the rendering provider from a non-person to a PERSON provider and completed check-in, an encounter will not be available for clinical documentation. The front desk staff or MA checking in the patient will need to **go back to the check-in stage, switch the rendering provider to the PERSON PROVIDER** and then **click 'Save'** to correct this.

- Complete the remaining check-in steps, then click **"Done with Check-in"** to complete the check-in process

Done with Check-in Save Cancel Check-in

Clinical Documentation

1. The nurse will locate and open the patient encounter by clicking on the patient's name from the calendar and then click on **"Go to Intake"**:



Anna IM-1-SP
30yo F | 12-17-1995 | #100040 | E#100040

Contact: (618) 785-9684 | Appointments: Next Nurse Appoi... | Provider: CINDY HA, FNP | Insurance: Primary *SELF PAY

Today Nurse Appointment 15 | Cindy Ha, FNP | Patient is ready for staff in Waiting Room. 2 hours, 34 minutes since check-in.

Go to Intake

PERSONAL INFO

Allergies
Penicillins

Problems
depressive disorder
verruca plantaris

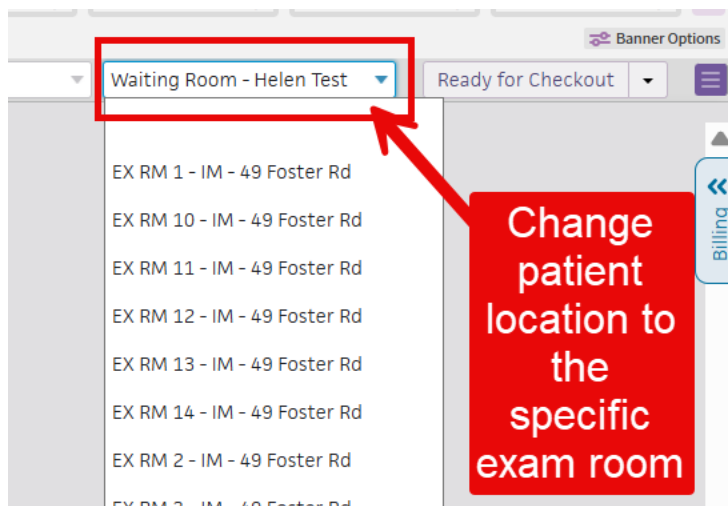
Medications
Celexa
multivitamin
Ortho Tri-Cyclen LO (28)

Last Visit with Internal Medicine
Recent Activity

Nurse Appointment 15, 03-20-2026
option 3
Performed by Cindy Ha, FNP, Internal Medicine, (845) 226-4590

Vitamin B 12 deficiency
Received pregnancy test, urine results
Start cyanocobalamin (vit B-12) 1,000 mcg/mL injection solution 1 mL every month

2. The nurse will then start the intake process by completing the following:
 - a. Change the patient location to the appropriate exam room



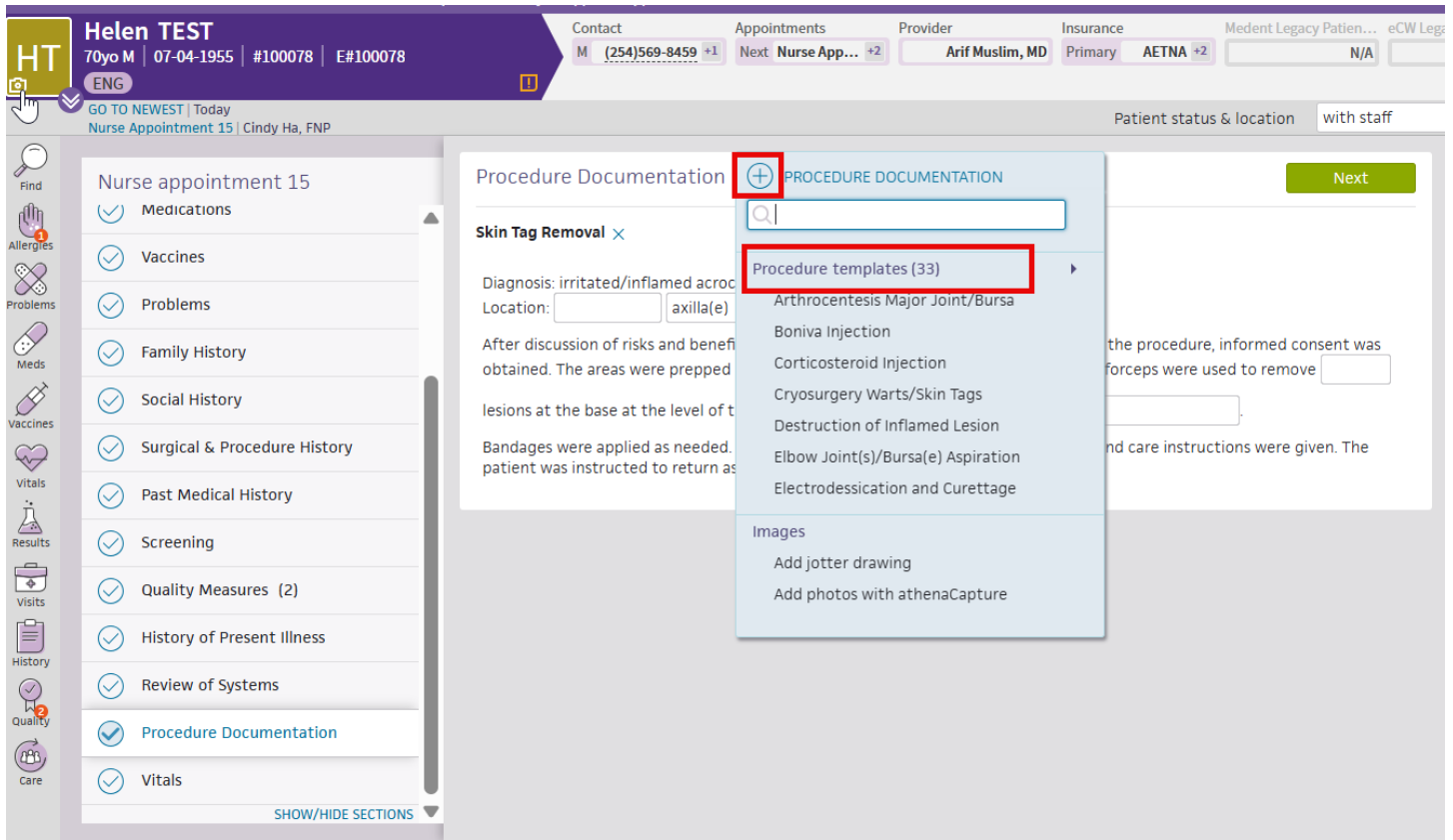
Waiting Room - Helen Test

Ready for Checkout

EX RM 1 - IM - 49 Foster Rd
EX RM 10 - IM - 49 Foster Rd
EX RM 11 - IM - 49 Foster Rd
EX RM 12 - IM - 49 Foster Rd
EX RM 13 - IM - 49 Foster Rd
EX RM 14 - IM - 49 Foster Rd
EX RM 2 - IM - 49 Foster Rd
EX RM 3 - IM - 49 Foster Rd

Change patient location to the specific exam room

- b. Enter **Reason for Visit** – the nurse will enter in the appropriate reason for visit. **Any reason for visit with "EP" will pull in an encounter** plan which populates accelerators within the encounter to help you document.
 - c. Document the intake check list sections in the chart paying special attention to:
 - i. The **Procedures Documentation** section where you can pull in pre-configured templates



The screenshot displays the athenahealth interface for a patient named Helen TEST. The top navigation bar includes patient information (70yo M, 07-04-1955, #100078, E#100078) and a list of tabs: Contact, Appointments, Provider, Insurance, Medent Legacy Patien..., and eCW Leg. The 'Appointments' tab is active, showing a 'Nurse App...' appointment with a 'Next' button. The left sidebar contains a list of sections: Nurse appointment 15, Medications, Vaccines, Problems, Family History, Social History, Surgical & Procedure History, Past Medical History, Screening, Quality Measures (2), History of Present Illness, Review of Systems, Procedure Documentation (highlighted), and Vitals. The main content area shows the 'Procedure Documentation' section for 'Skin Tag Removal'. A dropdown menu is open, displaying a search bar and a list of procedure templates (33). The templates include: Arthrocentesis Major Joint/Bursa, Boniva Injection, Corticosteroid Injection, Cryosurgery Warts/Skin Tags, Destruction of Inflamed Lesion, Elbow Joint(s)/Bursa(e) Aspiration, and Electrodesiccation and Curettage. The 'Procedure Documentation' section also includes a 'Next' button.

- i. The **Orders and Results** section – The nurse should enter in a diagnosis and place the appropriate order (if applicable). If an order is placed, the order listed under the “**Point of Care Test**” section should be chosen so the nurse can document the order in real time:

AI Anna IM-1-SP
30yo F | 12-17-1995 | #100040 | E#100040
ENG

Contact: M (618)785-9684 +1
Appointments: Next Nurse Appoi... +1
Provider: CINDY HA, FNP
Insurance: Primary *SELF PAY*
Medent Legacy Patient ID: N/A

Today
Nurse Appointment 15 | Cindy Ha, FNP

Patient status & location: ready for staff
Waiting Room

Orders and Results + **DIAGNOSES & ORDERS** Sign Orders

Prescription drug monitoring report
Misuse 800 Narcotics 652 Overdose 650 Sedatives 430 Stimulants 000

Patient-Supplied Results +
None recorded

Outstanding Orders
Internal Medicine
pregnancy test, urine (unsigned)
CINDY HA, FNP, Internal Medicine 03-17-2026
Other Specialties
No outstanding orders

Follow Up + RETURN TO OFFICE
Patient will return to the office as needed.

Nurse appointment 15

- Family History
- Social History
- Surgical & Procedure History
- Gynecological History
- Obstetric History
- Past Pregnancies
- Past Medical History
- Screening
- Clinical Add-Ons
- Quality Measures (11)
- History of Present Illness
- Review of Systems
- Procedure Documentation
- Orders and Results

d. The nurse will then perform the test/injection and **enter in the results**

- ii. Note, the result field could be either a dropdown or free text field depending on what the Point of Care (POC) test is

+ DIAGNOSES & ORDERS

Search: preg

Displaying labs from Premier Medical Group - Lab, imaging from Premier Medical Group Imaging. Edit preferences Powered by IMO Health

Diagnoses (20+)	Order Sets (5)
Pregnancy refine>	PMG Cold Symptoms (32) Preview
Positive pregnancy test Z32.01	PMG Contact Dermatitis (12) Preview
Normal pregnancy refine>	PMG Anxiety Depression (14) Preview
High-risk pregnancy refine>	PMG NEW DX Diabetes Type 1+2 (47) Preview
First trimester pregnancy Z34.91 U	PMG Adult Wellness Exam (47) Preview
Second trimester pregnancy Z34.92 U	
Possible pregnancy Z32.00	
Twin pregnancy refine>	
Pregnancy pruritus refine>	
Ectopic pregnancy refine>	
Prolonged pregnancy O48.1	
Planned pregnancy Z34.90 U	
Viable pregnancy refine>	
Pregnancy with history of pre-labor refine>	

Orders (34) ⓘ

- Pregnancy After Age 35: Care Instructions
- gestational diabetes: care instructions
- Postpartum Care at Home With Your Baby: Care Instructions
- high-risk pregnancy: care instructions
- Point Of Care Tests (1) ⓘ**
- pregnancy test, urine

Possible pregnancy



pregnancy test, urine

Visible to everyone

DECLINE | X

Point of care

Send out

Patient access to
results

☐ Do not immediately publish results ⓘ

To prevent the order and result from appearing on patient portal and other patient-facing surfaces, click on the order.

PRINT

VIEW DOCUMENT

Results

HCG

positive

enter results here

☐ Standing order

☐ Discussed with patient

*****Please note***** If the nurse has permission to sign orders (aka approve orders) the nurse will click the "Sign Orders". If the nurse **does not** have permission to sign off on the orders, **SKIP TO THE BILLING TAB section below:**

Orders and Results



DIAGNOSES & ORDERS

Sign Orders (1)

Prescription drug monitoring report

Misuse 800 Narcotics 652 Overdose 650 Sedatives 430 Stimulants 000

Positive pregnancy test





Visible to everyone

pregnancy test, urine

Visible to everyone

DECLINE | X

Point of care

Send out

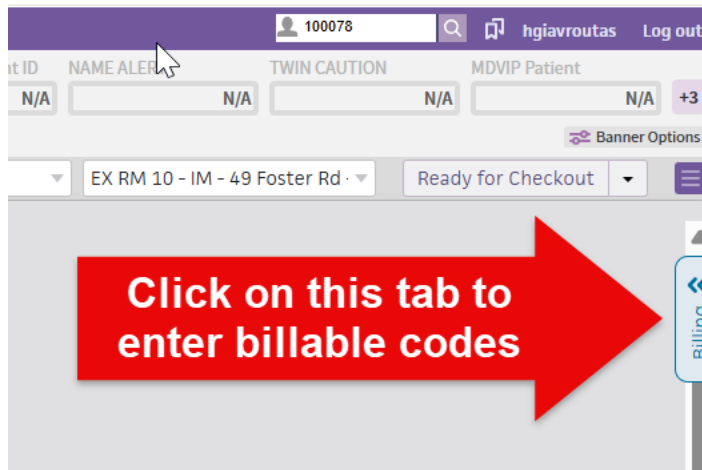
Patient access to
results

☐ Do not immediately publish results ⓘ

To prevent the order and result from appearing on patient portal and other patient-facing surfaces, click on the order.

Billing Tab

1. The nurse will select the billing tab to enter billable codes



- a. Enter applicable CPT codes
- b. Mark services as billable
- c. Check the 'Billing tab review complete' checkbox

Billing

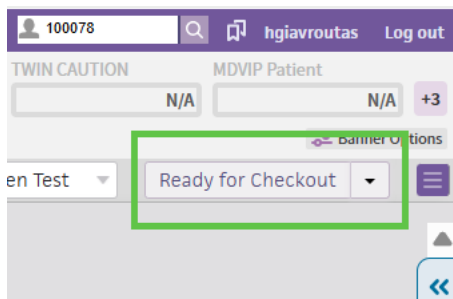
Provider Review must be marked as reviewed to close the encounter. E&M Coder Save & Mark Reviewed Save

Services

Procedure Code	Code Description	Modifiers (Non Fee-Affecting)	Units	ICD-10 Codes	Bill?
E&M				Z3201	☐
Missing Procedure Code					
Labs	PREGNANCY TEST, URINE - Sent to IM - 49 FOSTER ROAD (Internal)			Z3201	☐
Missing Procedure Code					
Miscellaneous					
Add Service					
Notes					
Audit history					
Clinical Add-Ons					
☐ Chlamydia Reporting					
Provider Review					
☐ Billing Tab Review Complete					

Provider Review must be marked as reviewed to close the encounter.

- You will be redirected to the sign off page. Click the **“Ready for Checkout”** button. patient.

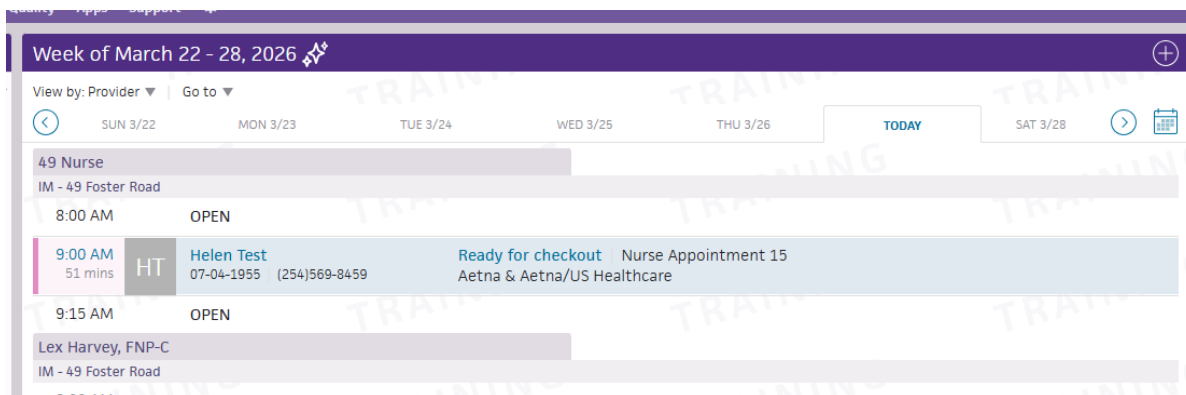


****Please note**** After clicking 'Ready for Checkout' the encounter will **automatically move from the nurse to the providers encounter bucket for the provider to sign off and close the encounter.**

This completes the nurse's portion of the patients' visit.

Check Out

- Front desk checks out the patient by clicking on the patient's name on the calendar:



- Front desk completes check out tasks (prints any documents, prints applicable orders, schedules return to offices, collects payment and prints receipt). When done, the front desk clicks **“Done with check-out”**

Patient Actions: Registration Messaging Scheduling Billing Clinicals Communicator Other

Patient Claim: Billing

Checkout

You can still collect a copay by specifying the amount.

Optional additional payment -- \$

Total amount to be collected \$0.00

Required field

Payment type Cash/Other Post date 03-27-2026 Department IM - 49 Foster Road

Payment method Cash

Record Payment

Receipt

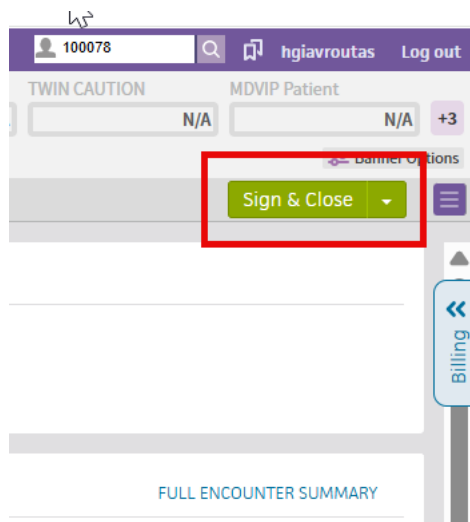
No charges or payments were created for this patient today.

Done with Checkout Save Claim: Billing

Provider Sign Off

- The rendering provider will open the patients' encounter from their encounter bucket, review, sign, and close the encounter by clicking "sign and close" or "Close" if the nurse has already signed off on the orders.

Inbox	Recently Viewed
View by: Type	
Encounters	1
Appointment Requests	0
Patient Cases	0
Orders / Rxs / Auths	0
Lab / Imaging	4



The screenshot shows the athenahealth interface. At the top, there is a header bar with a user profile icon, the ID '100078', a search icon, the name 'hgiavroutas', and a 'Log out' button. Below the header, there are two tabs: 'TWIN CAUTION' and 'MDVIP Patient'. Under 'TWIN CAUTION', there is a dropdown menu showing 'N/A'. Under 'MDVIP Patient', there is a dropdown menu showing 'N/A' and a '+3' button. A red box highlights a green 'Sign & Close' button with a dropdown arrow. To the right of the 'Sign & Close' button is a vertical sidebar with a 'Billing' button and a double arrow icon. At the bottom of the screen, there is a link for 'FULL ENCOUNTER SUMMARY'.

Billing and Claim Creation

1. The Premier billing team will work missing slips bucket per the standard athena process.