


The First Appointment

- New Registration.** When scheduling a new patient in your EMR, also enter them into CareConnections by clicking the red “New Registration” button. 
- Enter New Patient Data.** Fill in the Demographics information and save.
- Queue Initial Evaluation.** This can be done now or during your chart check process (next section).

The Day Before

- Chart Check to Start Cheat Sheet.** During chart check, look in your EMR to note upcoming assessments. Create a cheat sheet (paper or Excel) and include patient name/ID, DOB, and type of assessment (evaluation/interim/discharge). Leave a space for the four-letter kiosk (tablet) access code generated from CareConnections.
- Queue Assessments.** Log in to CareConnections and find the relevant patients using Patient ID Search. Right-click on the registration and select “Queue Assessment.” Fill in relevant info. Note that you can email the assessment to the patient if you filled in patient email when entering patient Demographics.
- Get Four-Letter Codes for Cheat Sheet.** Go to the “Assessment Queue” link and look up the four-letter kiosk (tablet) codes. Note them on your cheat sheet.

The Day Of

- Log In Your First Patient on the Tablet.** Look at the first patient of the day on your cheat sheet. Log them in on the tablet using their code and DOB. Note: If access code does not work, log in to CareConnections and look up the patient (Patient ID Search). See if there is a check in the “Queue” column. If there is no check mark, the patient likely completed the assessment at home via email or you did not queue the patient assessment yet.
- Patient Takes the Assessment.** Hand over the tablet to the patient/client when they come in. Be sure they hit the “End Survey” button to return to the log in page.
- Log in the next patient.**

At the End of the Day

- Fill in the New Patient Puzzle Pieces (Payer Detail to Intake).** For any initial evaluations, find them under “Treatment Registrations” and double click. Fill out the relevant information in the “Payer detail,” “Diagnosis,” and “Intake” sections (most likely found in your EMR or chart notes).
- Start Again at Chart Check!**