Verify patient identity and details

Purpose: Confirm who called and match the record to your EHR.

Steps

1. Open the call.
2. In the right panel, check Patient Info such as name, DOB, patient ID, insurance ID, email, and phone.
3. Use the copy icons to move any values into your EHR.

Tips and good practice

- If the caller supplied photos of IDs in SMS, review them and download for the chart if your policy allows.

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