

Checking In a Patient in NorthstarConnect

Front Desk Quick Reference | 6 steps | About 3 minutes



Before you start ☐ Logged in ☐ Scanner on ☐ Tablet charged ☐ Today's Schedule open

1 Find the patient

On **Today's Schedule**, search by last name. Pick the right appointment time.

Rivera 2 results			
TIME	PATIENT	PROVIDER	STATUS
9:30 AM	Rivera, Jordan DOB 04/12/1986	Dr. Patel	Scheduled
2:15 PM	Rivera, Jordan DOB 11/03/1972	Dr. Nguyen	Scheduled
9:45 AM	Okafor, Grace	Dr. Patel	Scheduled
10:00 AM	Chen, Marcus	Dr. Lopez	Scheduled

2 Confirm who they are

Ask the patient to **say** their full name and date of birth. Never read them aloud first. Then confirm phone, address and email.

PATIENT DETAILS	
Name	Jordan Rivera
Date of birth	04/12/1986
Phone	(512) 555-0148
Address	1840 Maple Ridge Dr, Austin, TX 78704
Email	j.rivera@example.com
☒ Patient stated name and date of birth ☐ Contact info confirmed	

3 Scan the insurance card

Scan front and back, then click **Check Eligibility**. Look for the status:

INSURANCE	
 Blue Horizon PPO Member: JR4481902 Group: 22017	 Blue Horizon PPO Member ID JR4481902 Last checked: 07/14/2026 Check Eligibility Active
Active	Needs Review Inactive

4 Sign forms

Tap **Send to Tablet**. Forms due today show a **Due** tag. The privacy notice is due once a year.

FORMS	
Notice of Privacy Practices Required once a year	Due
Health History Update Required every visit	Due
Financial Policy Signed 01/15/2026	Signed
Consent to Treat Signed 01/15/2026	Signed
Send to Tablet	

5 Collect the copay

The amount is shown in the **Balance** panel. Click **Collect Payment** and offer a receipt.

BALANCE	
Copay (office visit)	\$25.00
Previous balance	\$0.00
Due today	\$25.00
Collect Payment	Receipt: Print Email

6 Mark as Arrived

Click **Arrived**. The clinical team is notified. Tell the patient: "You're all set. Someone will call you back shortly."

Arrived	Marks the patient as arrived and notifies the clinical team. Collect the copay first to avoid a billing hold.
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Common mistakes

- **Wrong patient.** Two patients can share a name. Always check **2 identifiers**: name and date of birth.
- **Skipping insurance for returning patients.** Coverage changes. Check eligibility at **every** visit.
- **Clicking Arrived too early.** It puts the visit on a billing hold. Collect the copay first.



If eligibility fails

Don't turn the patient away.

1. Ask if they have a new card.
2. If not, click **Self-Pay Estimate** and share the amount.
3. Message Billing: **Message > Billing**.

Who to call System issues: IT Help Desk, ext. 4357 | Insurance or billing: Billing, ext. 2200 | Anything else: your Front Desk Lead