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Application Background
The new eBoarding web application was created in 2020 by Beaumont IT to assist in the scheduling of surgical cases. All cases boarded through the eBoarding web application are reviewed and processed by a Beaumont employee in a Surgical Services Office. Cases are reviewed and then entered into EPIC by a surgical boarder, cases entered in to eBoarding are not directly integrated with EPIC.

Accessing the eBoarding Website

eBoarding Provider Site
The eBoarding Provider website is the best resource to find eboarding related updates and helpful guides along with troubleshooting tips and information.

1. Visit https://providers.beaumont.org
2. Navigate to Quick Links in the right-side navigation
3. Click on “eBoarding”
4. Click on “Login” on the eBoarding website
Sign-in to eBoarding

Independent Staff & Physicians

All Independent Physicians and private office staff should use the Green boxes to sign-up and login to eBoarding.

*NOTE – all Independent staff members and Physicians with eBoarding accounts from the previous eBoarding applications must create a new account. Accounts from previous systems will not be transferred over.
New User Accounts

New User Sign-up Form

1. New Independent office staff and Physicians to eBoarding should click on the “Don’t have an account? Sign up now” link at the bottom of the green box to create their user-account.
2. After clicking “Sign up now” users will be directed to a profile page
3. Enter your email address (this can be any email you wish to use, personal or work as long as it is an Independent email address and not a Beaumont email address)

Email verification code
Before you can complete your profile, you must Verify your email address by clicking on “Send Verification Code”.

This will send an email to the address you typed in with a code to enter in the verification code line. You will need to check your email. The verification code will come from MICROSOFT. Email response times may vary.
Once you have entered the code and verified your account you can fill out the rest of the profile and click on “Create”. This will create your user account and sign you into eBoarding.

Returning Users Signing into eBoarding
Users who have already created their account in the new eboarding application should enter the email and password entered when they first signed-up to be logged into eBoarding. If you do not have an account, please follow the steps above to create one.
Beaumont Employees & Physicians

All Beaumont employees and Physicians should login using the Blue Beaumont button at the top of the sign-on screen.
Signing into eBoarding

Sign-in using your Beaumont credentials. Example – FirstName.LastName@beaumont.org and your current password.
Multi-Factor Authentication
For security purposes and according to Beaumont Health IT security and networking policies, all Beaumont employees and Physicians will need perform code verification to verify their account each time they log into the application. This can be done through a text verification code, or a verification phone call.

Please enter the phone number for the phone you have available. This can be a landline or cell phone. Landline numbers will require a phone call verification. Cell phones can receive a phone call or text verification code.

Creating your profile
The first time you sign-in you will be asked to create your eBoarding user profile. Please fill in all fields. Once you have completed the profile you will be asked to login using your Beaumont credentials.
Manage your Account

Change your password

Beaumont Physicians and employees

Beaumont employees and Physicians should use Password Self-Service (PSS) to reset their password if they are unable to login to the application.

Independent office staff and Physicians

Office staff and physicians can change their password on the sign-in screen by clicking on “Forgot your password?”
Once you enter your email address you will be asked to verify your account with a verification code.

Check your email account for an email from Microsoft
Enter the code in the email to verify your eboarding account and click on “Verify code”

After the code has been verified, click “Continue”
You will be asked to enter a second verification code through text or phone. The phone number you entered upon registration with your account will show up as the primary number for verification.

Click on Send Code or Call me to verify your account. Enter the code given through your text message or verify your account through the phone.
Once you are verified, you can enter a new password.

The password must be between 8 and 64 characters. The password must have at least 3 of the following:
- a lowercase letter
- an uppercase letter
- a digit
- a symbol
Update your Profile
All users have a profile in the eboarding application. To update yours, click on your name while on any screen.

Next, click on “Edit Profile”
You will now be able to edit the profile you created when you signed up for eboarding.
**eBoarding Home page**

Once logged in all users will be taken to the home page which displays their current case entries.

Case Entries are grouped according to their status

Pending, Rejected, Submitted, Completed and Reopened.

You may also search all of your cases by using the Search box.

*Note – The search function will only search the page you are on. It will not search across multiple tabs or pages.*
My Case Entries
This is your home screen. Every time you log into eBoarding, you will be taken to the My Case Entries screen to review all the cases you have submitted.
Pending Cases Tab

Pending cases are cases that are in a pending state and have not been submitted to the surgical boarding offices to be scheduled in EPIC.

To edit, update or submit or view a pending case click on the green “View” button
Editing a Pending Case
Pending cases can be edited any time before being submitted. Click on the “View” button in the Pending cases screen

You will be taken to the Confirmation page to choose which section you need to edit or update. Click on “Update” in the section you wish to update.

Pending cases cannot be submitted without the required information for each section.

Submit a Pending Case
Once a case has been submitted you cannot delete it. Submitted cases have been sent to the Surgical Boarding staff for review and scheduling into EPIC.

Submitted cases will be picked up by a surgical boarder for entry into EPIC. Once the case has been entered into EPIC, the case will be marked as “Completed”. This will move the case from your submitted tab to your completed tab.

If a case has been rejected the case will have notes from the surgical boarder in the notes log and appear under your “Rejected” tab.

Delete a Pending Case
Pending cases can be deleted while on the confirmation page view only. Once the case has been submitted, you cannot delete it from the system and must contact a Surgical Boarding office to delete or reject the case for you.

Submitted Cases Tab
Reviewing a submitted case
Once a case has been submitted you can review it by clicking on the “Submitted” tab and clicking on the green “View” button.
Click on “Reopen” to edit the case details

Once the case has been reopened, you will be able to update the necessary sections and re-submit the case. For more information see the Reopen Case Tab section.
Completed Cases Tab

Reviewing completed cases

Click on the green “View” button to see case details of a completed case and the EPIC ID assigned to that case.

All cases that have been approved and entered into EPIC will appear under the Completed Cases tab and contain the EPIC Case ID.

Completed cases can be reopened for editing at any time by clicking on the “Reopen” button.
Rejected Cases Tab
Reviewing rejected notes
Rejected cases have been rejected for several reasons by a surgical boarder. All rejected cases will appear under the “Rejected” tab. Rejected cases can be updated and re-submitted. Click on the green “View” button to update a case.

Updating a rejected case
Once on the confirmation page of the case, click on the “Update” button in any section to update the information and re-submit the case. The notes log will contain information on why the case was rejected.

Reopened Cases & Tab
Editing a Reopened Case
Reopened cases can be edited any time before being submitted. Click on the “View” button in the Reopened cases screen
You will be taken to the Confirmation page to choose which section you need to edit or update.
Reopened cases cannot be submitted without the required information for each section.

You will have the option to delete a reopened case at any time while it is Reopened. Once a case has been submitted you cannot delete it and you must contact a Surgical Boarding office to delete or reject the case for you.

Add a note while on the confirmation screen will allow you to enter notes related to the case for yourself and or the surgical boarder to see and review.
New Case Entry
The new Case Entry section contains all the screens needed to enter patient information to board a case. These sections may have changed compared to previous eboarding application screens. Please include any additional details related to the case in the notes section of the confirmation page. This includes self-pay insurance options, pre-existing conditions, or additional patient requests. Notes can be added by clicking on the orange “Add Note” button while on the confirmation page of a case.

*Note - The sections are NOT auto-save, you must click “Save & Continue” before moving to the next section to save the information you have entered.
Patient Information
The patient information screen captures the required and minimum information needed to locate a
or create a patient in EPIC.

The following fields are required

1. First Name
2. Last Name
3. Address
4. City
5. State
6. ZIP
7. Date of Birth – You can enter the date or choose from a calendar choice
8. Gender
9. Phone Number
After entering all the patient information, click save and continue to move to the next section. Patient information is kept viewable at the top of every section. Once you have completed the patient information section you can freely move to other sections in the New Case Entry screen.

*Please remember cases cannot be submitted until all required fields for each section are entered.*
**Surgery Information**

The surgery information screen captures all the information related to the patient’s surgery. This section includes the primary surgeon’s information. Please include additional surgeons or assistance in the notes section if there are more than one surgeon assigned to the case.

The following fields are required:

1. Surgeon availability date
2. Surgeon availability start and end time
3. Location – this is the location the surgery will be performed at
4. Patient Class

**Add-on Case Check Box**

If you are adding onto a previous case or existing case please check this box and also contact the surgical boarding office for that specific location.
Procedures

The Procedures screen captures the information about the patient’s procedure.

The following are required fields

1. Pre-Op Diagnosis – This is an open field. You may type as many procedure diagnoses as needed.
2. Surgeon Name – This is a searchable field and pre-populated list that pulls all available surgeons. Please search by Physician first or last name. You can also enter multiple physicians into the text area by typing into it. If your surgeon is not listed, please contact the surgical boarding offices.
3. Procedure Description – Please include all details regarding the procedure description.
4. Laterality
5. CPT Code(s) – CPT codes are required for the new eBoarding application.
Patient Information

Name: Bentley Biscuit
Address: 123 Pup Pupville MI 48135
Gender: Male
Date Of Birth: 12/28/1975
Phone: (867) 530-9867
Last 4 Of Social: ****

Procedure Details

Pre Op Diagnosis

The Pre Op Diagnosis field is required.

Surgeon Name

The Surgeon Name field is required.

Procedure Description

The Procedure Description field is required.

Billing Type  Laterality  Anesthesia Type  CPT Code(s)

The Laterality field is required.

The CPT Code(s) field is required.
Surgeon Search Field
This is a searchable field. Please search by Physician first or last name. You can also enter multiple physicians into the text area by typing into it if you do not see your surgeon listed.
Questions

The Questions screen captures additional procedural and surgical information related to the patient’s case.

The following fields are required

1. ERAS (enhanced recovery after surgery)
2. Latex Allergies
3. Needs Interpreter
Special Needs
The Special Needs screen captures special requests for surgery related to equipment and other devices.

There are no required fields in this section.
**Staff Screen**

The staff screen captures additional staff that may be present or assisting in the surgery.

There are no required fields in this section.
Insurance Info

The insurance information screen captures the patient’s insurance information for billing purposes.

The following are required fields

1. Carrier – This is a pre-populated list. Please begin typing the carrier name to find the proper insurance carrier.

You may enter more than one insurance carrier by typing into the field area after selecting the first insurance. You may also add a secondary insurance in the notes section on the confirmation screen.
Confirmation Screen
The confirmation screen captures the information that was entered in the previous sections. It will display in a yellow box the sections that are missing required fields. Cases cannot be submitted without the required fields being filled in for each section. To fill in the missing section click on the “update” button in that section. After the required fields are filled out, you can save the case details and go to the confirmation screen to submit the case.

Cases can be deleted from the confirmation screen.

The top section of the confirmation screen includes the case status. You will see either Pending, Submitted, Rejected, Re-opened.

If the case has been completed, you will see the Epic Case ID

There is a Recent Notes section that captures the edits and history of the case. When it was edited, by whom and any additional notes entered by the user or surgical boarding staff.
### Patient Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Gender</th>
<th>Address</th>
<th>Date Of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laura Mathis</td>
<td>Female</td>
<td>123 street test MI 45839</td>
<td>12/12/2000</td>
</tr>
<tr>
<td>Phone</td>
<td></td>
<td>(248) 588-6950</td>
<td></td>
</tr>
</tbody>
</table>

### Surgery Information

<table>
<thead>
<tr>
<th>Surgeon Availability Date</th>
<th>Location</th>
<th>Patient Class</th>
<th>Add On Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/20/2020 06:30 AM to 09:00 AM</td>
<td>Beaumont Hospital, Dearborn</td>
<td>Inpatient</td>
<td>No</td>
</tr>
</tbody>
</table>

### Procedures

<table>
<thead>
<tr>
<th>Pre Op Diagnosis</th>
<th>Surgeon Name</th>
<th>Procedure Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>test</td>
<td>MOHAD A SOBH DO-1003839685</td>
<td>shoulder surgery</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Billing Type</th>
<th>Laterality</th>
<th>Anesthesia Type</th>
<th>CPT Code(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right</td>
<td></td>
<td></td>
<td>1001, 1002</td>
</tr>
</tbody>
</table>

### Questions

<table>
<thead>
<tr>
<th>ERAS</th>
<th>Latex Allergies</th>
<th>Needs Interpreter</th>
<th>Preferred Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

### Special Needs

<table>
<thead>
<tr>
<th>Equipment Request</th>
<th>Laser Request</th>
<th>Instrument Request</th>
<th>Supply Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implant Request</td>
<td>Bed Or Table Request</td>
<td>Positioning Request</td>
<td>Pre Surgical Block Type</td>
</tr>
<tr>
<td>Other Request</td>
<td>High Blood Pressure</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Staff

<table>
<thead>
<tr>
<th>Surgical Staff</th>
<th>One Surgical PA</th>
</tr>
</thead>
</table>

### Insurance Info

<table>
<thead>
<tr>
<th>Plan Name</th>
<th>Subscriber ID</th>
<th>Pre Authorization Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEAUMONT EMPLOYEE OCCUPATIONAL HEALTH-1625-TROY-Michigan-48083</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Patient Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Gender</th>
<th>Date Of Birth</th>
<th>Phone</th>
<th>Last 4 Of Social</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laura</td>
<td>8600 York St</td>
<td>Female</td>
<td>05/05/1994</td>
<td>(480) 444-7085</td>
<td>5972</td>
</tr>
</tbody>
</table>

- **Add Note**
- **Go back to case details**

**Notes History**

<table>
<thead>
<tr>
<th>ID</th>
<th>Notes</th>
<th>Created By</th>
<th>Created Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>Patient details updated</td>
<td><a href="mailto:Laura.Matlin@beaumont.org">Laura.Matlin@beaumont.org</a></td>
<td>2/11/2020 5:26 PM</td>
</tr>
<tr>
<td>2004</td>
<td>New case entry created</td>
<td><a href="mailto:Laura.Matlin@beaumont.org">Laura.Matlin@beaumont.org</a></td>
<td>2/11/2020 8:56 PM</td>
</tr>
</tbody>
</table>
Help & Support

Surgical Boarding Offices
All email address listed below are for issues related to the eboarding process, request termination of an office employee account or general questions for the hospital. DO NOT include any patient information when emailing any of the surgical boarding offices.

<table>
<thead>
<tr>
<th>Location</th>
<th>Phone Numbers</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dearborn</td>
<td>313-593-7429</td>
<td><a href="mailto:eboardingdearborn@beaumont.org">eboardingdearborn@beaumont.org</a></td>
</tr>
<tr>
<td>Farmington Hills</td>
<td>947-521-8606</td>
<td><a href="mailto:eboardingfarmingtonhills@beaumont.org">eboardingfarmingtonhills@beaumont.org</a></td>
</tr>
<tr>
<td>Grosse Pointe</td>
<td>Surgery 313-473-1976, Endo 313-473-1787</td>
<td><a href="mailto:eboardinggrossepointe@beaumont.org">eboardinggrossepointe@beaumont.org</a></td>
</tr>
<tr>
<td>Taylor</td>
<td>313-295-5399</td>
<td><a href="mailto:eboardingtaylor@beaumont.org">eboardingtaylor@beaumont.org</a></td>
</tr>
<tr>
<td>Trenton</td>
<td>Hospital Boarding Office 734-671-3265, Surgery 734-642-2266</td>
<td><a href="mailto:eboardingtrenton@beaumont.org">eboardingtrenton@beaumont.org</a></td>
</tr>
<tr>
<td>Troy</td>
<td>248-964-8440</td>
<td><a href="mailto:eboardingtroy@beaumont.org">eboardingtroy@beaumont.org</a></td>
</tr>
<tr>
<td>Wayne</td>
<td>734-467-4033</td>
<td><a href="mailto:eboardingwayne@beaumont.org">eboardingwayne@beaumont.org</a></td>
</tr>
</tbody>
</table>
Contact the Help Desk
Visit the Beaumont Help Desk online or by calling 888-481-2448 to submit a problem ticket if you are experiencing issues with the application.

Troubleshooting
I am receiving an error when I try to sign in
Please try closing your browser and opening a new session if you are receiving an error when signing in. If that does not work, please clear your cache.

I tried to sign-in but someone else is still signed in to eBoarding, how do I sign- in?
Please try closing your browser and opening a new session if you are receiving an error when signing in. If that does not work, please clear your cache.

Printing
Cases can be printed while in the Confirmation view. Please use your CTRL + P or print option through your browser.

Chrome Browser Printing
For help on printing while using Chrome.

Internet Explorer (IE) Printing
For help on printing while use Internet Explorer (IE).

Frequently Asked Questions
How do I delete a user account?

To request a user be removed from the eBoarding system please email one of the surgical boarding offices and include the users first name, last name and email address used for eboarding.

How do I view cases assigned to a specific surgeon or one of my co-workers?
Currently only surgical boarders within the hospital can see cases assigned to all surgeons. Only the person who boarded for that surgeon can see his cases. You will not be able to see cases assigned to other people.

Where do I enter pre-existing conditions?

There is no specific section for pre-existing conditions. Please list all pre-existing conditions in the “Recent Notes” section in the confirmation page screen. Notes can be added by clicking on the orange “Add Note” button.

How do I re-assign a case to someone in my office if I am going on vacation or taking a leave of absence?
Currently cases cannot be re-assigned to another person. To have a case re-assigned for any reason, please submit an IT Service Request through the online portal or call the Beaumont Help Desk.

**How do I print a case?**

See the [Printing section](#) for details on how to print a case

**Where should I enter implant or plastic surgery related specific information?**

Please use the notes section to include any plastic surgery related information that is not found under the New Case Entry screens.

**How do I submit feedback about the new eboarding application?**

Please send all feedback to eboarding@beaumont.org