

# **eBoarding Reference Manual**

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Version 2.0

## Table of Contents

eBoarding Reference Manual .....	1
Table of Contents .....	2
What is eBoarding? .....	3
Accessing the eBoarding Website .....	3
Your Account .....	4
Create Your Profile .....	4
Login: Independent Staff & Physician .....	7
Login: Corewell Employees & Physicians .....	8
Change Your Password: Corewell Account .....	10
Change Your Password: Independent Account .....	10
Update your Profile .....	14
eBoarding Home Page .....	15
My Case Entries .....	16
Pending Cases Tab .....	17
Editing a Pending Case .....	18
Submit a Pending Case .....	18
Delete a Pending Case .....	18
Submitted Cases Tab .....	19
Completed Cases Tab .....	21
Rejected Cases Tab .....	22
Reviewing Rejected Notes .....	22
Updating a Rejected Case .....	22
Reopened Cases & Tab .....	23
New Case Entry .....	25
Patient Info Screen .....	26
Surgery Info Screen .....	28
Procedures Screen .....	30
Surgeon Search Field .....	32
Questions Screen .....	34
Special Needs Screen .....	35
Staff Screen .....	36
Insurance Info Screen .....	37
Confirmation Screen .....	38
Help & Support .....	39
Surgical Boarding Offices .....	39
Contact the Help Desk .....	41
Troubleshooting .....	42
Printing .....	42
Frequently Asked Questions .....	42

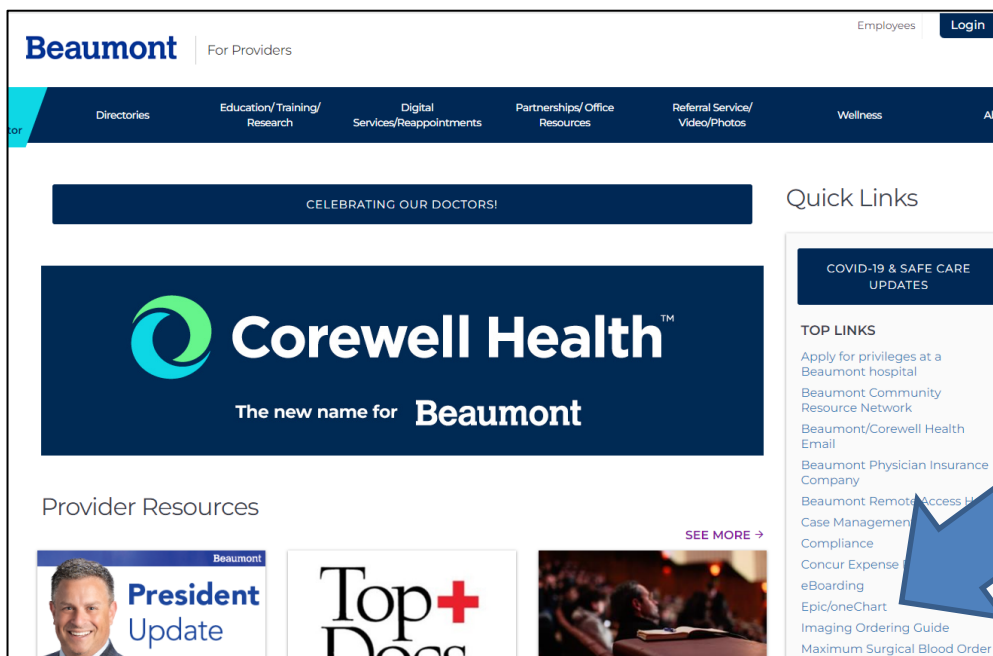
## What is eBoarding?

The eBoarding web application was created by the Corewell East Web Services Team in 2014 to help schedule surgical cases into EPIC. All cases boarded through the eBoarding web application are reviewed and processed by a Corewell employee in a Surgical Services Office. Cases are reviewed and then entered into EPIC by a surgical boarder, cases entered into eBoarding are not directly integrated with EPIC.

## Accessing the eBoarding Website

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

1. Visit <https://providers.Corewell.org>.
2. Navigate to Quick Links in the right-side navigation.
3. Click “eBoarding”.

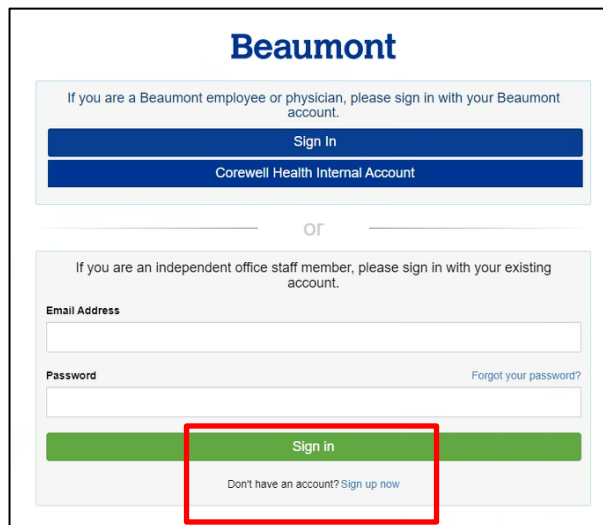


## Your Account

### Create Your Profile

*The first time you sign-in you will be asked to create your eBoarding user profile. Please fill in all fields. Users who have already created their account in the new eBoarding application should enter the email and password entered.*

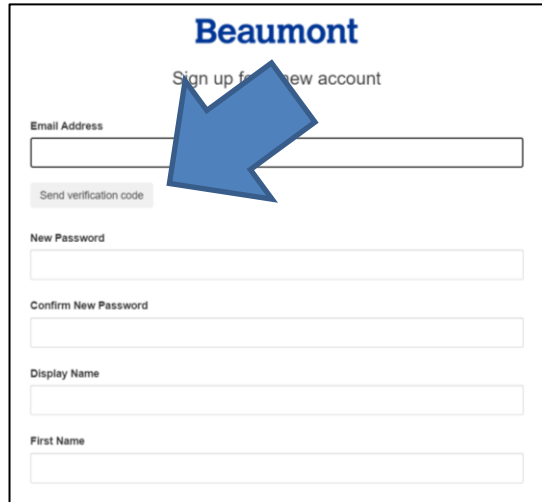
1. Click on **Sign Up Now** link on the bottom of the login page.



The screenshot shows the Beaumont login page. At the top, the word "Beaumont" is displayed in blue. Below it, a light blue box contains the text "If you are a Beaumont employee or physician, please sign in with your Beaumont account." and two blue buttons: "Sign In" and "Corewell Health Internal Account". Below this box, the word "OR" is centered. Underneath, another light blue box contains the text "If you are an independent office staff member, please sign in with your existing account." followed by "Email Address" and a text input field, then "Password" and another text input field. To the right of the password field is a link that says "Forgot your password?". Below the password field is a green "Sign In" button, which is highlighted with a red rectangle. At the bottom of the form, there is a link that says "Don't have an account? Sign up now".

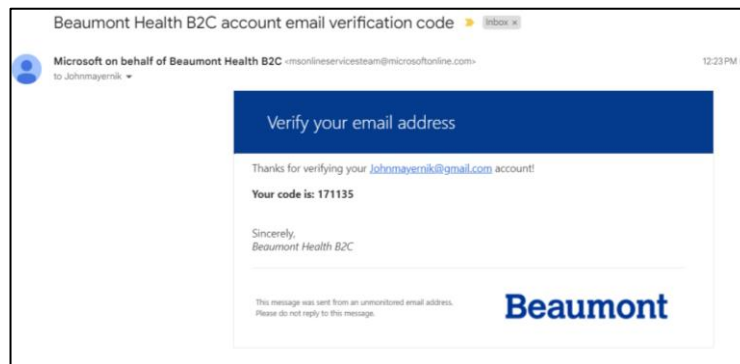
2. Enter your email.

3. Click on “Send Verification Code”. This code will be sent to the email you entered.



The image shows a web form for creating a new account with Beaumont. At the top, the word "Beaumont" is in blue. Below it, the text "Sign up for a new account" is centered. The form contains several input fields: "Email Address", "New Password", "Confirm New Password", "Display Name", and "First Name". A grey button labeled "Send verification code" is positioned below the email field. A large blue arrow points from the "Send verification code" button towards the "Email Address" field.

The verification code will come from MICROSOFT. Email response times may vary. The email will look something like this:



**4. Enter the code.**

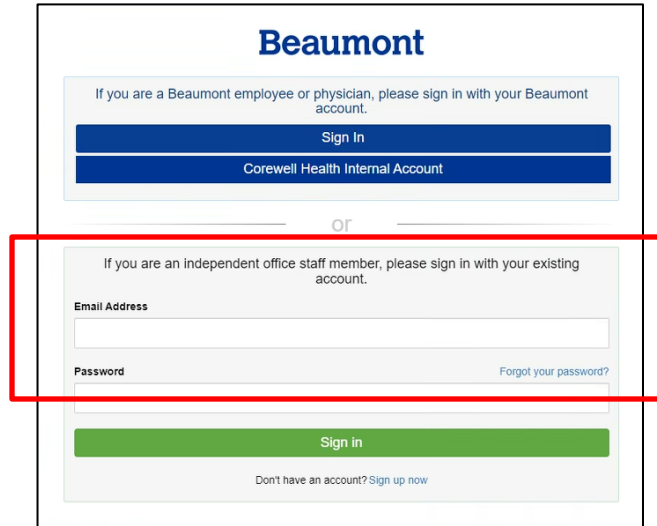
**Beaumont**  
Sign up for a new account  
Verification code has been sent to your inbox. Please copy it to the input box below.  
**Email Address**  
  
**Verification Code**  
  
[Verify code](#) [Send new code](#)  
**New Password**  
  
**Confirm New Password**  
  
**Display Name**

**5. Fill out the rest of the form.**

**6. Click on “Create”.** This will create your user account and sign you into eBoarding.

## Login: Independent Staff & Physician

All Independent Physicians and private office staff should use the green-box section to sign-up and log into eBoarding.



The image shows a login form for Beaumont. The form is titled "Beaumont" in blue. It has two main sections. The top section is for Beaumont employees or physicians, with a light blue background. It contains the text "If you are a Beaumont employee or physician, please sign in with your Beaumont account." and two blue buttons: "Sign In" and "Corewell Health Internal Account". Below this is a horizontal line with the word "or" in the center. The bottom section is for independent office staff members, with a light gray background. It contains the text "If you are an independent office staff member, please sign in with your existing account." and two input fields: "Email Address" and "Password". The "Password" field has a link "Forgot your password?" to its right. Below the input fields is a green button labeled "Sign In". At the very bottom of the form is a link "Don't have an account? Sign up now". A red rectangular box highlights the bottom section, including the text, input fields, and the green "Sign In" button.

**Beaumont**

If you are a Beaumont employee or physician, please sign in with your Beaumont account.

Sign In

Corewell Health Internal Account

or

If you are an independent office staff member, please sign in with your existing account.

Email Address

Password [Forgot your password?](#)

Sign In

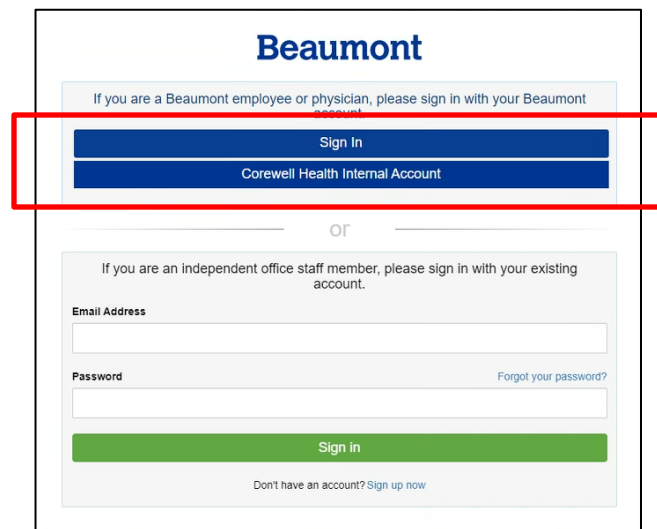
Don't have an account? [Sign up now](#)

## Login: Corewell Employees & Physicians

All Corewell employees and Physicians should login using the Blue Corewell Health button. The original “Sign In” button is for beaumont.org email accounts. This “Sign In” button will not be available after June 23, 2023.

If you use a Beaumont email account, you will have to create a new account in the Corewell environment. Accounts from previous systems will not and cannot be transferred over. This includes long-standing beaumont.org accounts. See [Create Your Profile](#) for instructions.

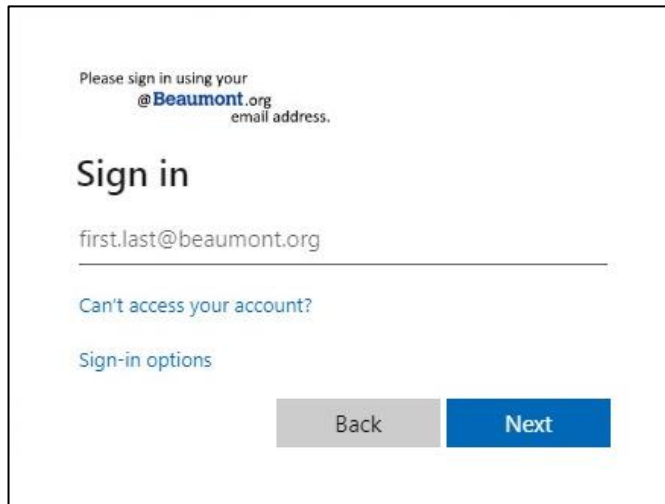
### 1. Click on Corewell Health Internal Account button.



The image shows a login interface for Beaumont. At the top, the word "Beaumont" is displayed in blue. Below it, a light blue box contains the text: "If you are a Beaumont employee or physician, please sign in with your Beaumont account." Below this text are two blue buttons: "Sign In" and "Corewell Health Internal Account". A red rectangular box highlights these two buttons. Below the buttons is a horizontal line with the word "or" in the center. Below the line is another light blue box containing the text: "If you are an independent office staff member, please sign in with your existing account." Below this text are two input fields: "Email Address" and "Password". To the right of the "Password" field is a link that says "Forgot your password?". Below the input fields is a green "Sign In" button. At the bottom of the form is a link that says "Don't have an account? Sign up now".



2. **Sign-in using your Corewell credentials.** Use your current password and your email with the firstname.lastname@corewellhealth.org pattern.



Please sign in using your  
@Beaumont.org  
email address.

## Sign in

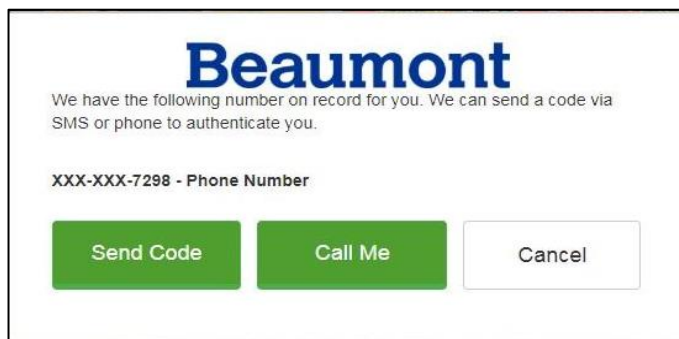
first.last@beaumont.org

[Can't access your account?](#)

[Sign-in options](#)

[Back](#) [Next](#)

3. For security purposes and according to Corewell Health IT security and networking policies, all Corewell 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.



## Beaumont

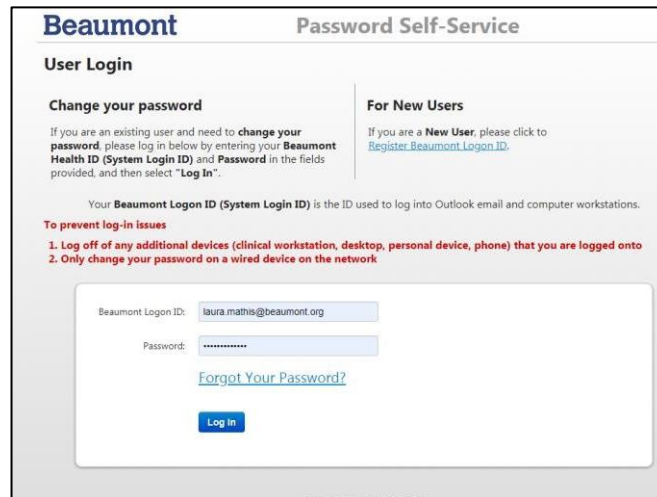
We have the following number on record for you. We can send a code via SMS or phone to authenticate you.

XXX-XXX-7298 - Phone Number

[Send Code](#) [Call Me](#) [Cancel](#)

## Change Your Password: Corewell Account

Corewell employees and physicians should use [Password Self-Service](#) (PSS) to reset their password if they are unable to login to the application.

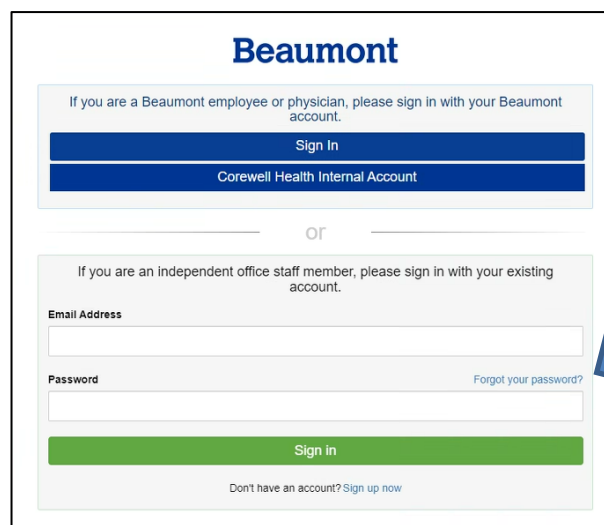


The screenshot shows the 'Beaumont Password Self-Service' page. It has a header with 'Beaumont' and 'Password Self-Service'. Below is a 'User Login' section. On the left, under 'Change your password', it says: 'If you are an existing user and need to change your password, please log in below by entering your Beaumont Health ID (System Login ID) and Password in the fields provided, and then select "Log In".' On the right, under 'For New Users', it says: 'If you are a New User, please click to [Register Beaumont Login ID](#).' Below this, it states: 'Your Beaumont Login ID (System Login ID) is the ID used to log into Outlook email and computer workstations.' There are two red instructions: '1. Log off of any additional devices (clinical workstation, desktop, personal device, phone) that you are logged onto' and '2. Only change your password on a wired device on the network'. The login form has two fields: 'Beaumont Login ID:' with the example 'laura.mathis@beaumont.org' and 'Password:' with masked characters. Below the fields are links for 'Forgot Your Password?' and a blue 'Log In' button.

## Change Your Password: Independent Account

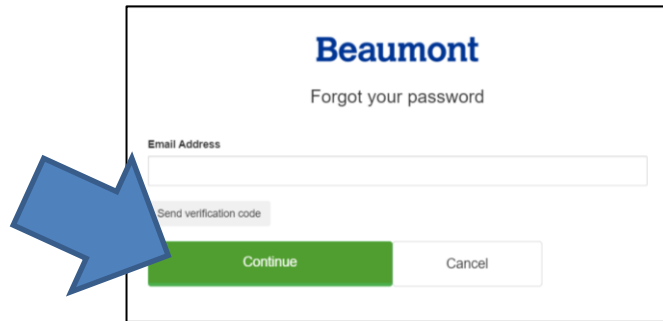
Office staff and physicians can change their password.

1. **Click on Forgot Your Password link.** Whether you actually forgot your password or not, this is the start.



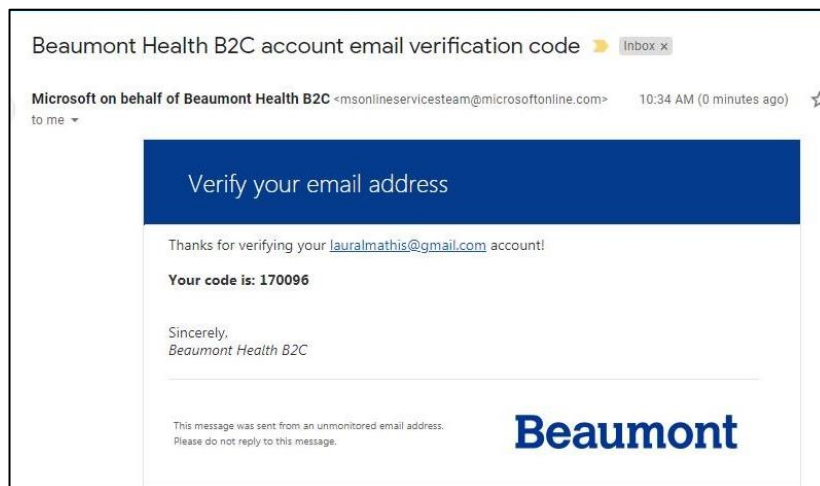
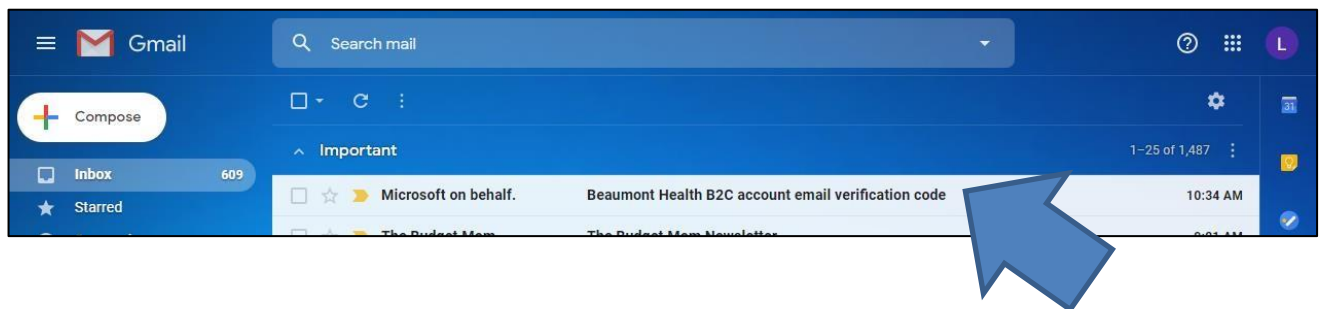
The screenshot shows the 'Beaumont' login page. It has a header with 'Beaumont'. Below is a section for Beaumont employees/physicians with 'Sign In' and 'Corewell Health Internal Account' buttons. Below that is an 'OR' separator. Then, a section for independent office staff members with the text: 'If you are an independent office staff member, please sign in with your existing account.' This section has 'Email Address' and 'Password' fields, a 'Forgot your password?' link, and a green 'Sign In' button. At the bottom, it says 'Don't have an account? Sign up now'. A large blue arrow points to the 'Forgot your password?' link.

2. Type in your password.
3. Click on Send verification code button.



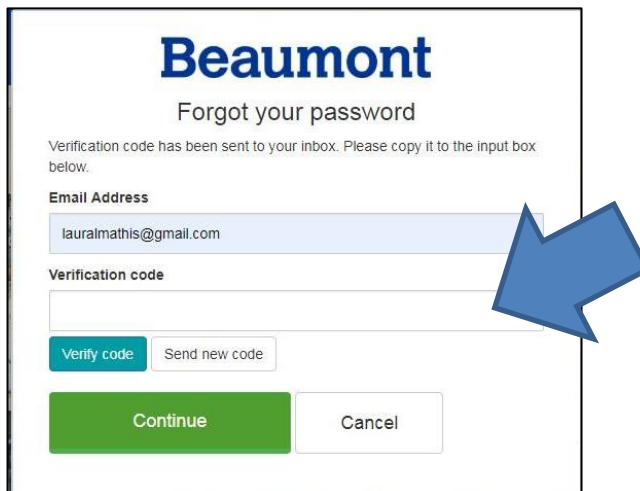
The image shows a web form titled "Beaumont" with the subtitle "Forgot your password". It contains an "Email Address" input field, a "Send verification code" button, and two buttons at the bottom: "Continue" (green) and "Cancel" (white). A large blue arrow points to the "Send verification code" button.

4. Check your email account for an email from Microsoft.



5. Enter the code that was found in the email.

6. Click on “Verify code” button.



**Beaumont**

Forgot your password

Verification code has been sent to your inbox. Please copy it to the input box below.

**Email Address**

lauralmathis@gmail.com

**Verification code**

7. After the code has been verified, click “Continue”



**Beaumont**

Forgot your password

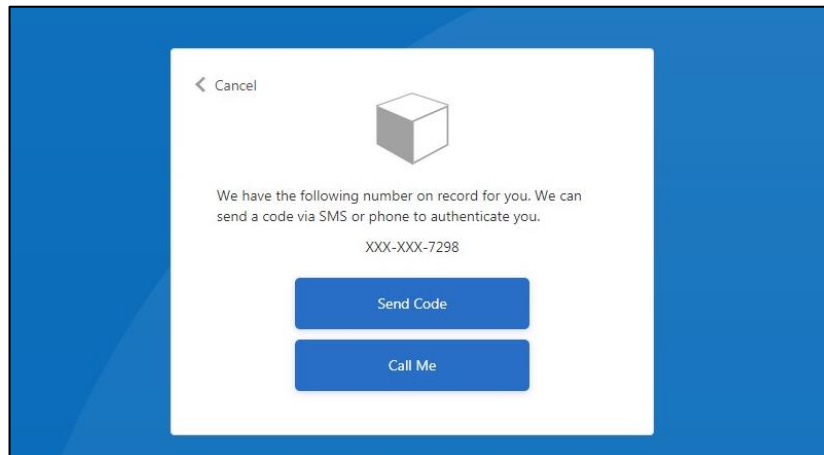
E-mail address verified. You can now continue.

**Email Address**

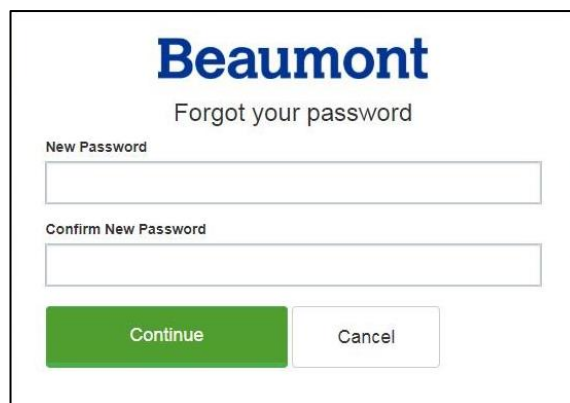
lauralmathis@gmail.com

**Verification code**

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.



8. **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, and / or a symbol.

A screenshot of the Beaumont password reset form. At the top is the "Beaumont" logo in blue, followed by the text "Forgot your password". Below this are two input fields: "New Password" and "Confirm New Password". At the bottom are two buttons: a green "Continue" button and a white "Cancel" button.

9. **Click on Continue.**

## Update your Profile

All users have a profile in the eBoarding application.

1. Click on your name while on any screen.



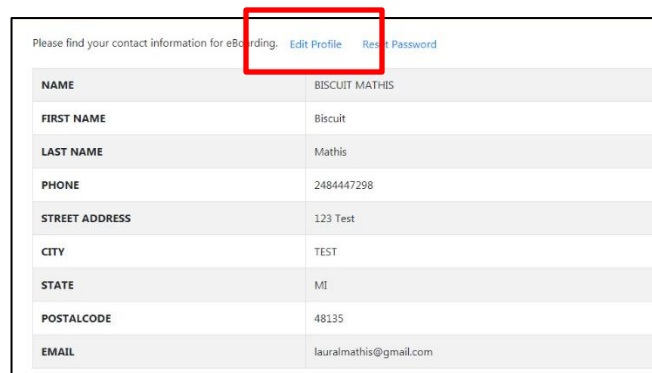
You are logged in as **Biscuit Mathis**

My Case Entries

Pending (0) Rejected (0) Submitted (0) Completed (1) Reopened (0)

You do not have any pending case entries.

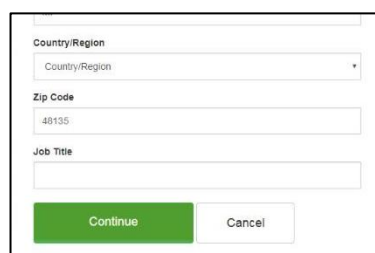
2. Click on Edit Profile.



Please find your contact information for eBoarding. [Edit Profile](#) [Reset Password](#)

NAME	BISCUIT MATHIS
FIRST NAME	Biscuit
LAST NAME	Mathis
PHONE	2484447298
STREET ADDRESS	123 Test
CITY	TEST
STATE	MI
POSTALCODE	48135
EMAIL	lauralmathis@gmail.com

3. You will now be able to edit the profile you created when you signed up for eBoarding.  
**Make your changes.**
4. Click on **Continue**. You are done.



Country/Region

Country/Region

Zip Code

48135

Job Title

Continue Cancel

## 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.

The search function will only search the page you are on. It will not search across multiple tabs or pages.

My Case Entries

Pending (3)

Rejected (0)

Submitted (0)

Completed (1)

Reopened (0)

Show 10 entries

Search:

Patient	Phone	Status	Location	Surgeon Availability	Surgeon	Last Updated By	Last Updated On	
Laura Mathis Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	2/11/2020 5:26 PM	<a href="#">View</a>
LAURA MATHIS Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	1/17/2020 9:09 AM	<a href="#">View</a>
laura mathis Female	(248) 598-6959	Pending			MOHAMAD A SOBH DO-1003030685	Laura.Mathis@beaumont.org	1/15/2020 1:59 PM	<a href="#">View</a>

Showing 1 to 3 of 3 entries

Previous

1

Next

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.

My Case Entries

[Pending \(3\)](#)
[Rejected \(0\)](#)
[Submitted \(0\)](#)
[Completed \(1\)](#)
[Reopened \(0\)](#)

Show  entries

Search:

Patient	Phone	Status	Location	Surgeon Availability	Surgeon	Last Updated By	Last Updated On	
Laura Mathis Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	2/11/2020 5:26 PM	<a href="#">View</a>
LAURA MATHIS Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	1/17/2020 9:09 AM	<a href="#">View</a>
laura mathis Female	(248) 598-6959	Pending			MOHAMAD A SOBH DO-1003030685	Laura.Mathis@beaumont.org	1/15/2020 1:59 PM	<a href="#">View</a>

Showing 1 to 3 of 3 entries

[Previous](#)
[1](#)
[Next](#)



## 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.

My Case Entries

Pending (3)
Rejected (0)
Submitted (0)
Completed (1)
Reopened (0)

Show 10 entries
Search:

Patient	Phone	Status	Location	Surgeon Availability	Surgeon	Last Updated By	Last Updated On	
Laura Mathis Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	2/11/2020 5:26 PM	
LAURA MATHIS Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	1/17/2020 9:09 AM	
laura mathis Female	(248) 598-6959	Pending			MOHAMAD A SOBH DO-1003030685	Laura.Mathis@beaumont.org	1/15/2020 1:59 PM	

Showing 1 to 3 of 3 entries

Previous
1
Next

## 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.

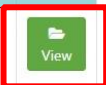

## Submitted Cases Tab

Once a case has been submitted you can review it by clicking on the “Submitted” tab and clicking on the green “View” button.

My Case Entries

Pending (2)
Rejected (0)
Submitted (2)
Completed (1)
Reopened (0)

Show 10 entries
Search:

Patient	Phone	Status	Location	Surgeon Availability	Surgeon	Last Updated By	Last Updated On	
Bentley Biscuit Male	(867) 530-9867	Submitted	Beaumont Hospital, Troy	02/28/2020 07:00 AM - 10:00 AM	VISHAL K PATEL MD-1083877294	Laura.Mathis@beaumont.org	2/13/2020 3:05 PM	
laura mathis Female	(248) 598-6956	Submitted	Beaumont Hospital, Dearborn	02/20/2020 08:00 AM - 12:00 PM	MOHAMAD A SOBH DO-1003030685	Laura.Mathis@beaumont.org	2/13/2020 2:55 PM	

Showing 1 to 2 of 2 entries

Previous
1
Next

Click on “Reopen” to edit the case details

Epic Case ID:		Status: Submitted	
<div>  </div>			
<b>Patient Information</b>			
First Name	Middle Initial	Last Name	Gender
Bentley		Biscuit	Male
Address	City	State	Zip
123 Pup	Pupville	MI	48135
Phone	Last 4 Of SSN	Date Of Birth	
(867) 530-9867	**** 	12/28/1975	
<b>All Notes</b>			
Case entry has been submitted 2/14/2020 4:33:35 PM Laura.Mathis@beaumont.org			
Case entry is reopened. 2/13/2020 3:05:55 PM Laura.Mathis@beaumont.org			
Case entry has been submitted 2/13/2020 3:05:34 PM Laura.Mathis@beaumont.org			

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

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

My Case Entries

[Pending \(2\)](#)
[Rejected \(1\)](#)
[Submitted \(0\)](#)
[Completed \(1\)](#)
[Reopened \(1\)](#)

Show  entries Search:

Patient	Phone	Status	Location	Surgeon Availability	Surgeon	Last Updated By	Last Updated On	
Laura Masthis Female	(259) 875-4695	Completed	Beaumont Hospital, Farmington Hills	01/17/2020 12:30 PM - 04:00 PM	MARC D SMITH MD-1942261615	Narasimharao.Ko davati@beaumont.org	1/09/2020 1:43 PM	

Showing 1 to 1 of 1 entries Previous  Next

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.**

Epic Case ID: 434032433245
Status: Completed

First Name

Cat

Middle Initial

Last Name

Dog

Gender

Male

Address

123 Bone

City

Dogville

State

MI

Zip

48183

Phone

(724) 984-9204

Last 4 Of SSN

\*\*\*\* [Show](#)

Date Of Birth

09/23/2012

Surgeon Availability Date

01/23/2020  
08:00 AM to 11:30 AM

Add On Case

No

Patient Class

Surgery Admit

Location

Beaumont Hospital, Farmington Hills

Reopen

All Notes

Completed, Communicate to the office  
1/04/2020 11:08:57 AM  
Phil.Bettendorf@beaumont.org

System Generated - Case entry has been submitted  
1/17/2020 9:18:19 AM  
lauramathis@gmail.com

System Generated - New case entry created  
1/17/2020 9:15:56 AM  
lauramathis@gmail.com

## 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.

My Case Entries

Pending (2) **Rejected (1)** Submitted (0) Completed (1) Reopened (0)

Show 10 entries Search:

Patient	Phone	Status	Location	Surgeon Availability	Surgeon	Last Updated By	Last Updated On	
laura mathis Female	(248) 598-6956	Rejected	Beaumont Hospital, Dearborn	02/20/2020 01:30 AM - 04:00 AM	MOHAMAD A SOBH DO- 1003030685	Laura.Mathis@beaumont.org	2/13/2020 2:53 PM	

Showing 1 to 1 of 1 entries Previous 1 Next

### 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

Reopened cases can be edited any time before being submitted. Click on the “View” button in the Reopened cases screen

My Case Entries

Pending (2) Rejected (0) Submitted (1) Completed (1) **Reopened (1)**

Show 10 entries Search:

Patient	Phone	Status	Location	Surgeon Availability	Surgeon	Last Updated By	Last Updated On	
Bentley Biscuit Male	(867) 530-9867	Reopened	Beaumont Hospital, Troy	02/28/2020 07:00 AM - 10:00 AM	VISHAL K PATEL MD-1083877294	Laura.Mathis@beaumont.org	2/13/2020 3:05 PM	<b>View</b>

Showing 1 to 1 of 1 entries Previous 1 Next

You will be taken to the Confirmation page to choose which section you need to edit or update

Status: Reopened, please review/ update the case details for final submission.

**Patient Information**

Name: Bentley Biscuit

Gender: Male

Address: 123 Pup, Pupville MI 48135

Phone: (867) 530-9867

Last 4 Of SSN: \*\*\*\* [Show](#)

Date Of Birth: 12/28/1975

[Update](#)

[Submit](#)

**Recent Notes**

[Add Note](#)

System Logs

Case entry is reopened.  
2/14/2020 4:43:55 PM  
Laura.Mathis@beaumont.org

Case entry is reopened.  
2/13/2020 3:05:55 PM  
Laura.Mathis@beaumont.org

Patient has high BP  
2/13/2020 3:05:13 PM  
Laura.Mathis@beaumont.org

**Surgery Information**

Surgeon Availability Date: 02/28/2020  
07:00 AM to 10:00 AM

Location: Beaumont Hospital, Troy

Patient Class: Surgery Admit

Add On Case: No

[Update](#)

**Procedures**

Pre Op Diagnosis: [Update](#)

Surgery to remove tumor, insert stent

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.





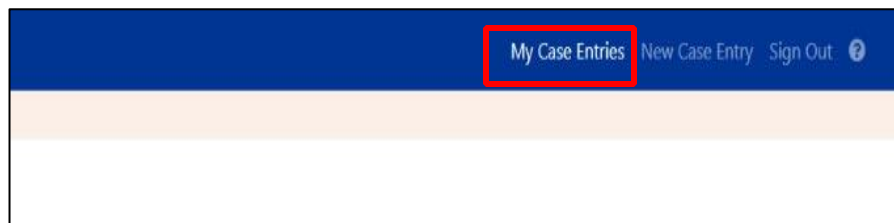
## New Case Entry

The New Case Entry section contains all the screens needed to enter patient information to board a case. Please include any additional details related to the surgical 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.

---

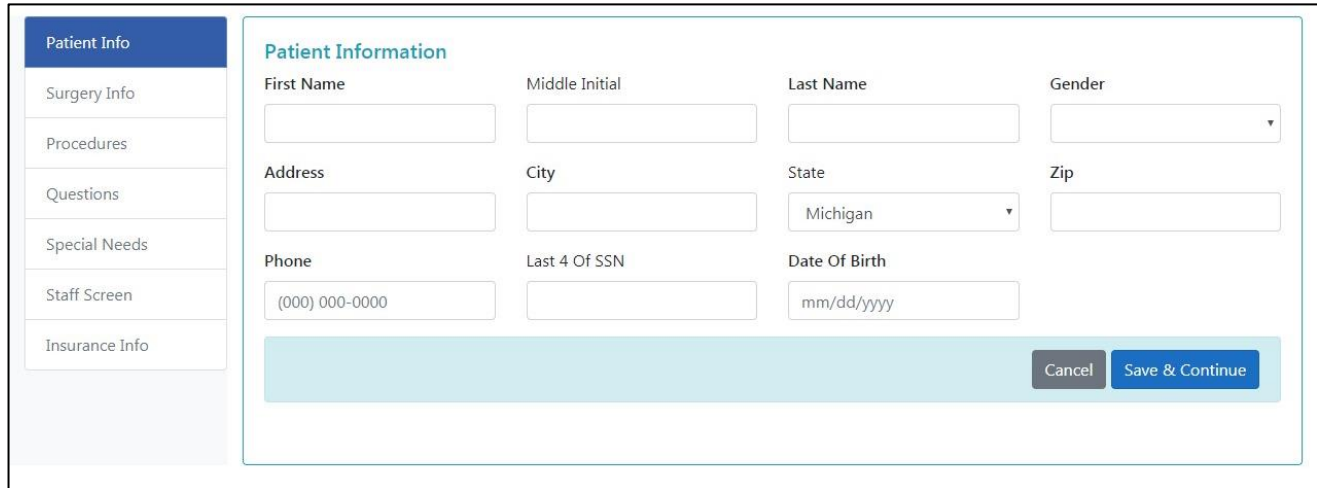
The sections do NOT auto-save, you must click “Save & Continue” before moving to the next section to save the information you have entered.

---



## Patient Info Screen

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

- First Name
- Last Name
- Address
- City
- State
- ZIP
- Date of Birth –You can enter the date or choose from a calendar choice
- Gender
- Phone Number

Patient Info

Surgery Info

Procedures

Questions

Special Needs

Staff Screen

Insurance Info

### Patient Information

First Name <input type="text"/> <small>The First Name field is required.</small>	Middle Initial <input type="text"/>	Last Name <input type="text"/> <small>The Last Name field is required.</small>	Gender <input type="text" value=""/>
Address <input type="text"/> <small>The Address field is required.</small>	City <input type="text"/> <small>The City field is required.</small>	State <input type="text" value="Michigan"/>	Zip <input type="text"/> <small>The Zip field is required.</small>
Phone <input type="text" value="(000) 000-0000"/> <small>The Phone field is required.</small>	Last 4 Of SSN <input type="text"/>	Date Of Birth <input type="text" value="mm/dd/yyyy"/> <small>The Date Of Birth field is required.</small>	

Cancel

Save & Continue

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.

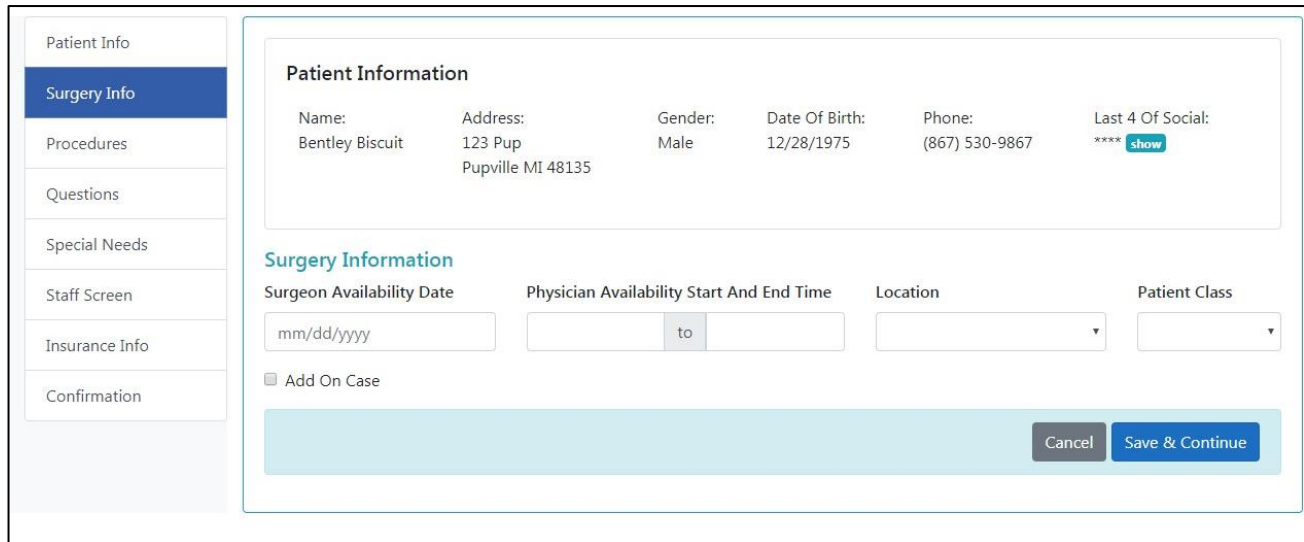
---

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

---

## Surgery Info Screen

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 screenshot shows a web interface for entering surgery information. On the left is a vertical sidebar with menu items: Patient Info, Surgery Info (highlighted in blue), Procedures, Questions, Special Needs, Staff Screen, Insurance Info, and Confirmation. The main content area is titled 'Patient Information' and contains fields for Name (Bentley Biscuit), Address (123 Pup, Pupville MI 48135), Gender (Male), Date Of Birth (12/28/1975), Phone ((867) 530-9867), and Last 4 Of Social (\*\*\*\* with a 'show' button). Below this is a section titled 'Surgery Information' with fields for Surgeon Availability Date (mm/dd/yyyy), Physician Availability Start And End Time (with a 'to' separator), Location (dropdown), and Patient Class (dropdown). There is an 'Add On Case' checkbox and a light blue bar at the bottom containing 'Cancel' and 'Save & Continue' buttons.

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.

Patient Info

**Surgery Info**

Procedures

Questions

Special Needs

Staff Screen

Insurance Info

Confirmation

**Patient Information**

Name:	Address:	Gender:	Date Of Birth:	Phone:	Last 4 Of Social:
Bentley Biscuit	123 Pup Pupville MI 48135	Male	12/28/1975	(867) 530-9867	**** <a href="#">show</a>

**Surgery Information**

Surgeon Availability Date

mm/dd/yyyy

The Surgeon Availability Date field is required.

Physician Availability Start And End Time

to

The Start Time field is required. The End Time field is required.

Location

The Location field is required.

Patient Class

The Patient Class field is required.

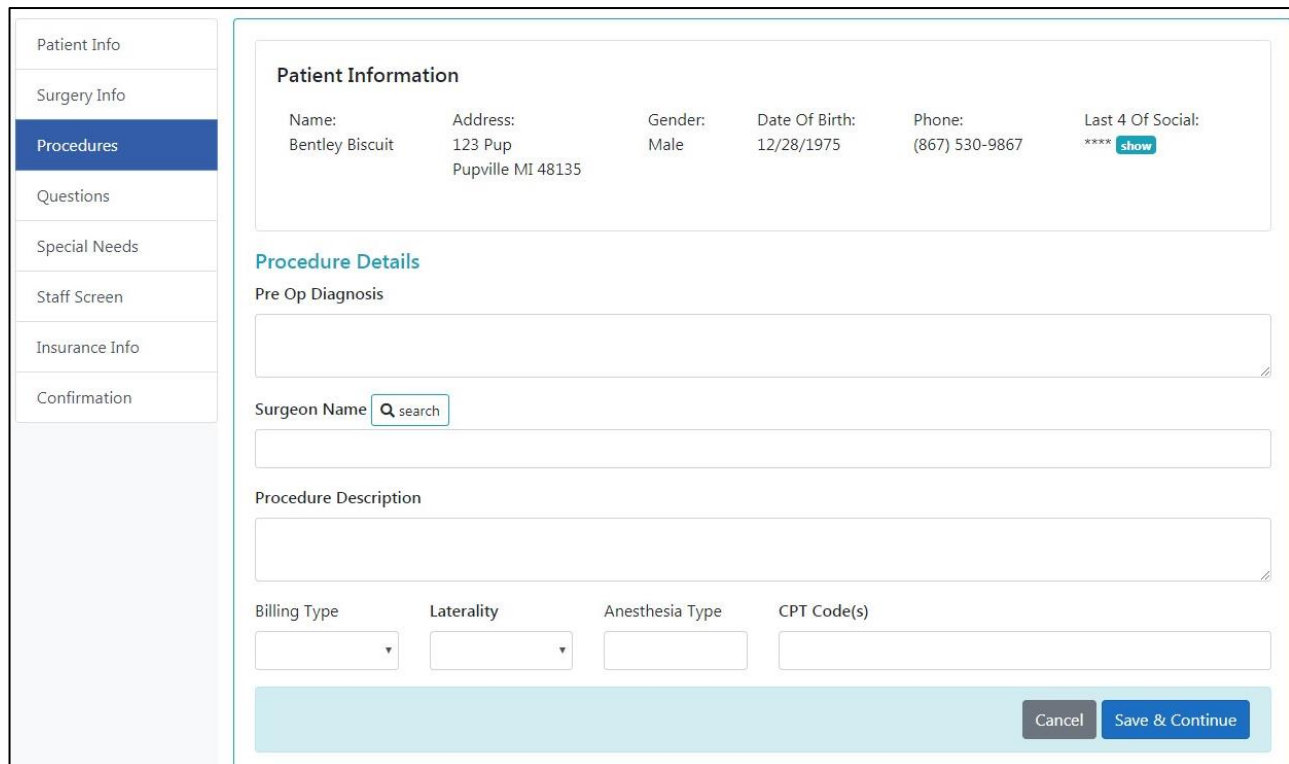
☐ Add On Case

Cancel

Save & Continue

## Procedures Screen

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



The following are required fields

- **Pre-Op Diagnosis** – This is an open field. You may type as many procedure diagnoses as needed.
- **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 you surgeon is not listed, please contact the surgical boarding offices.
- **Procedure Description** – Please include all details regarding the procedure description.
- **Laterality**
- **CPT Code(s)** – CPT codes are required for the new eBoarding application.

Patient Info

Surgery Info

**Procedures**

Questions

Special Needs

Staff Screen

Insurance Info

Confirmation

**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:

\*\*\*\* [show](#)

**Procedure Details**

**Pre Op Diagnosis**

The Pre Op Diagnosis field is required.

**Surgeon Name** [Q search](#)

The Surgeon Name field is required.

**Procedure Description**

The Procedure Description field is required.

**Billing Type**

**Laterality**

The Laterality field is required.

**Anesthesia Type**

**CPT Code(s)**

The CPT Code(s) field is required.

Cancel

Save & Continue

## 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.

Search Physician

First Name

Last Name

NPI

Search

Search Physician

First Name

Patel

NPI

Search

Name	NPI	Specilty	Address	
KIRIT C PATEL MD	1003871294	Cardiology	42557 Woodward #200 Bloomfield Hills Michigan 48304 248-222-1170	<div>select</div>
VISHAL K PATEL MD	1083877294	Pulmonary Disease	3535 W 13 Mile Rd #507 Royal Oak Michigan 48073 248-551-0497	<div>select</div>
SUDHANSHU PATEL MD	1104816370	Gastroenterology & Hepatology	28963 Little Mack #101 St Clair Shores Michigan 48081 586-447-0700	<div>select</div>
SNEHA R PATEL MD	1376504472	Diagnostic Radiology	3601 W 13 Mile Rd Royal Oak Michigan 48073 248-898-6064	<div>select</div>



**Patient Information**

Name:	Address:	Gender:	Date Of Birth:	Phone:	Last 4 Of Social:
Bentley Biscuit	123 Pup Pupville MI 48135	Male	12/28/1975	(867) 530-9867	**** <a href="#">show</a>

**Procedure Details****Pre Op Diagnosis**

Surgery to remove tumor  
insert stint

**Surgeon Name** 

VISHAL K PATEL MD-1083877294

The Surgeon Name field is required.

**Procedure Description**

Remove tumor on lung

**Billing Type****Laterality****Anesthesia Type****CPT Code(s)**[Cancel](#)[Save & Continue](#)



## Special Needs Screen

The Special Needs screen captures special requests for surgery related to equipment and other devices. There are no required fields in this section.

**Patient Information**

Name:	Address:	Gender:	Date Of Birth:	Phone:	Last 4 Of Social:
Bentley Biscuit	123 Pup Pupville MI 48135	Male	12/28/1975	(867) 530-9867	**** <a href="#">show</a>

**Special Needs**

Equipment Request	Instrument Request	Implant Request	Positioning Request
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Laser Request	Supply Request	Bed Or Table Request	Pre Surgical BlockType
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Request			
<input type="text"/>			

[Cancel](#) [Save & Continue](#)

## 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.

**Patient Information**

Name:	Address:	Gender:	Date Of Birth:	Phone:	Last 4 Of Social:
Bentley Biscuit	123 Pup Pupville MI 48135	Male	12/28/1975	(867) 530-9867	**** <a href="#">show</a>

**Staff Information**

Surgical Staff

[Cancel](#) [Save & Continue](#)

## Insurance Info Screen

The insurance information screen captures the patient's insurance information for billing purposes. The following are required fields:

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

Patient Info  
Surgery Info  
Procedures  
Questions  
Special Needs  
Staff Screen  
**Insurance Info**  
Confirmation

**Patient Information**  
Name: Bentley Biscuit    Address: 123 Pup Penville MI 48135    Gender: Male    Date Of Birth: 12/28/1975    Phone: (867) 530-9867    Last 4 Of Social: \*\*\*\* [show](#)

**Insurance**  
Carrier     Subscriber ID     Pre Authorization Number   
The Carrier field is required.

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.

**Beaumont** | eBoarding  
You are logged-in as Mathis, Laura L

My Case Entries   New Case Entry   Manage ▾   Sign out   ?

Patient Info  
Surgery Info  
Procedures  
Questions  
Special Needs  
Staff Screen  
**Insurance Info**  
Confirmation

**Patient Information**  
Name: Bentley Biscuit    Address: 123 Pup Penville MI 48135    Gender: Male    Date Of Birth: 12/28/1975    Phone: (867) 530-9867    Last 4 Of Social: \*\*\*\* [show](#)

**Insurance**  
Carrier     Subscriber ID     Pre Authorization Number

## 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.

Status: Pending, please review/ update the case details for final submission.

Patient Information			Update	Submit	Delete
Name	Gender	Address			
laura mathis	Female	123 street test MI 45859			
Phone	Last 4 Of SSN	Date Of Birth			
(248) 598-6959		12/12/2000			

Recent Notes

+ Add Note

System Logs

Patient Info	Procedure	Staff Screen	Insurance Info	Confirmation
<p>Patient Information</p> <p>Name: Laura Mathis Address: 3690 Tenth Dr. Westland MI 48185 Gender: Female Date Of Birth: 01/20/1984 Phone: (248) 444-7298 Last 4 Of Social: ****</p> <p>Add Note Go back to Case Details</p>				

Case Entry Notes

Id	Notes	Created By	Created DateTime
2065	Patient details updated	Laura.Mathis@beaumont.org	2/11/2020 5:26 PM

## 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.

Location	Phone Numbers	Email
Dearborn	313-593-7429	CHEeboardingdearborn@corewellhealth.org
Farmington Hills	947-521-8606	CHEeboardingfarmingtonhills@corewellhealth.org
Grosse Pointe	Surgery 313-473-1976  Endo 313-473-1787	CHEeboardinggrossepointe@corewellhealth.org
Royal Oak	CVS, PVS, Thoracic, Colon-Rectal, General 248-273-6434  All Urology, OB/GYN, ENT 248-273-6350  Orthopedics, Neurosurgery 248-273-6479  Occuloplastics, Ophthalmology, Oral, General Pediatrics, Podiatry, Plastics, Vitreo-Retinopathy 248-273-6357	CHEeboardingroyaloak@corewellhealth.org
Taylor	313-295-5399	CHEeboardingtaylor@corewellhealth.org

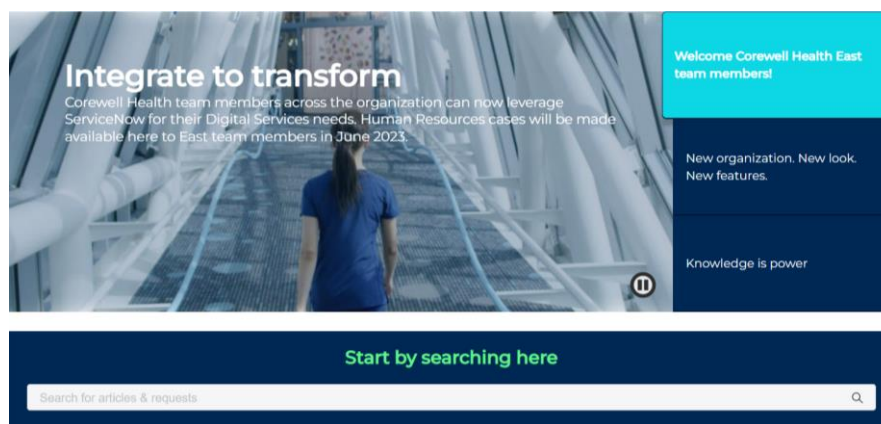
Location	Phone Numbers	Email
Trenton	Hospital Boarding Office 734-671-3265  Surgery 734-642-2266	CHEEboardingtrenton@corewellhealth.org
Troy	248-964-8440	CHEEboardingtroy@corewellhealth.org
Wayne	734-467-4033	CHEEboardingwayne@corewellhealth.org



## Contact the Help Desk

Visit the if you are experiencing issues with the application.

1. Go to [Corewell Help Desk online](#) or call 888-481-2448 to submit a problem ticket.
2. Type “I need something else CHE” in the search box.
3. Select it.



4. When the ticket screen appears, type in your request and select your name.

I need something else CHE

Used when you can't find what you're looking for after searching the Catalog.

**This item is for IS Requests only and to be used when you cannot find what you need in the Catalog.**

If something is broken or not working the way it should, use [Create Incident](#). You can find it on the ServiceNow homepage by clicking on Need Assistance.

Please be specific on the details of your request in the 'Additional information' box below.

Your request will be routed to the Service Desk to determine the appropriate next steps and thus, will take more time to be delivered than an already defined service in the catalog.

Requested for

John Mayernik

×

▼

Requested by

John Mayernik

▼

\* Additional Information

Write the PPG issue here.

5. Click on the Submit button on the right of screen.

## 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 Corewell 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 [CHEeboarding@corewellhealth.org](mailto:CHEeboarding@corewellhealth.org).