eBoarding Reference Manual

Published on May 22, 2023

Version 2.0

Table of Contents

# 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".**
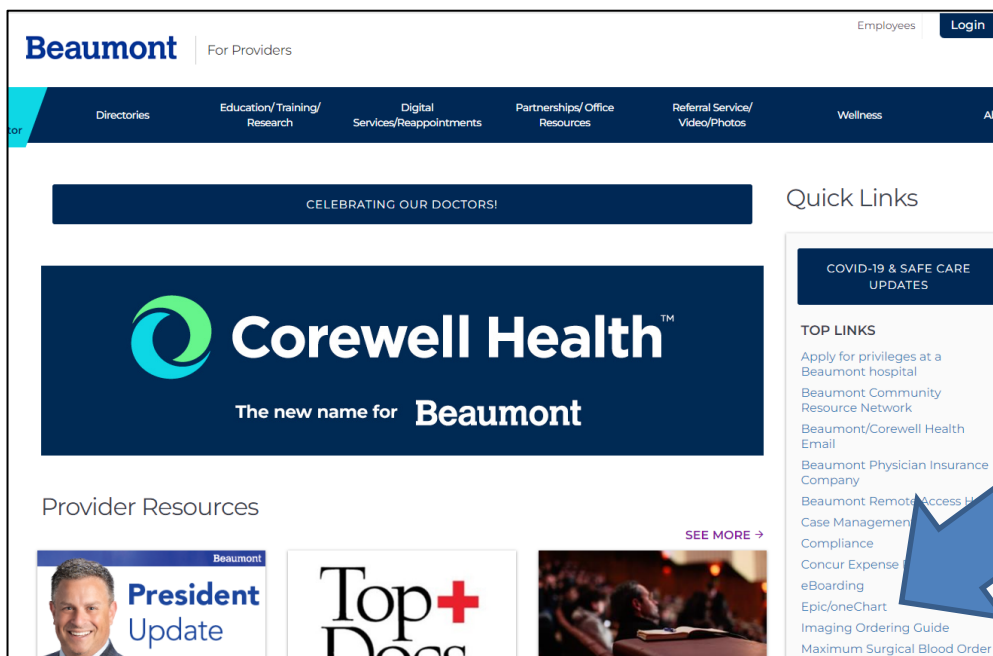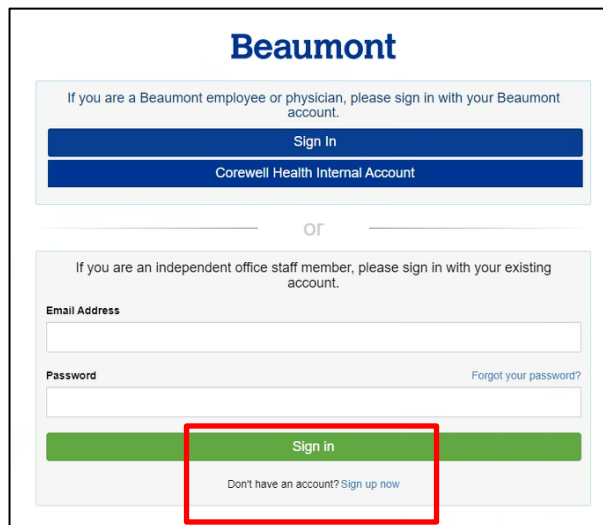
Your Account

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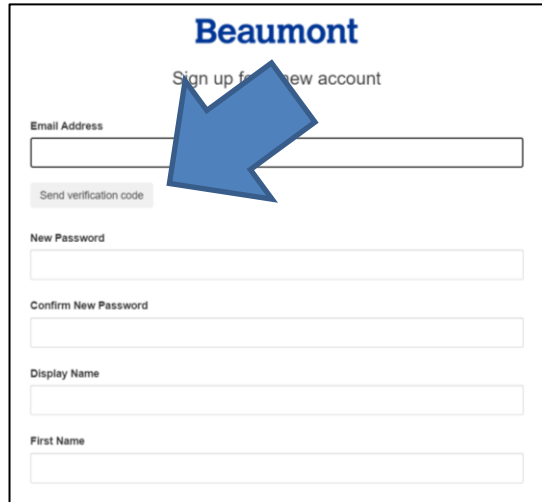
1. **Click on Sign Up Now link on the bottom of the login page.**

2. **Enter your email.**

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

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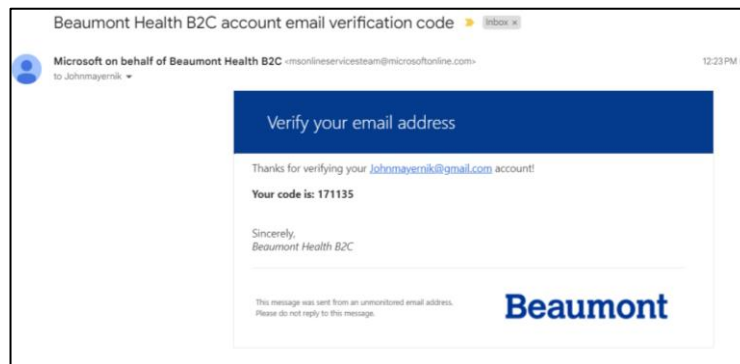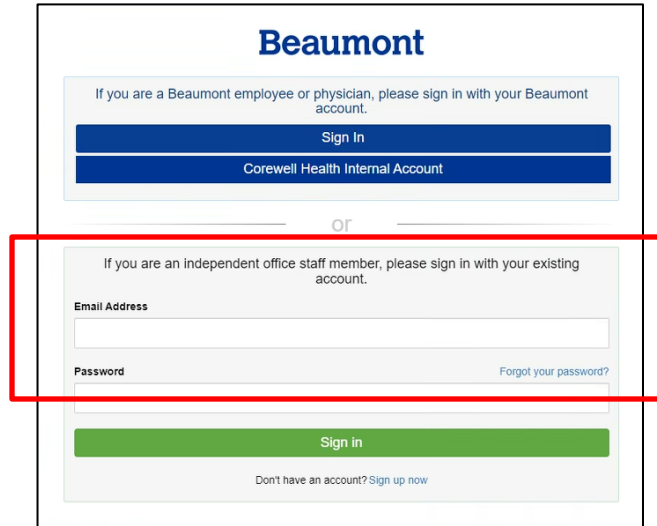
4. **Enter the code.**

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.

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.

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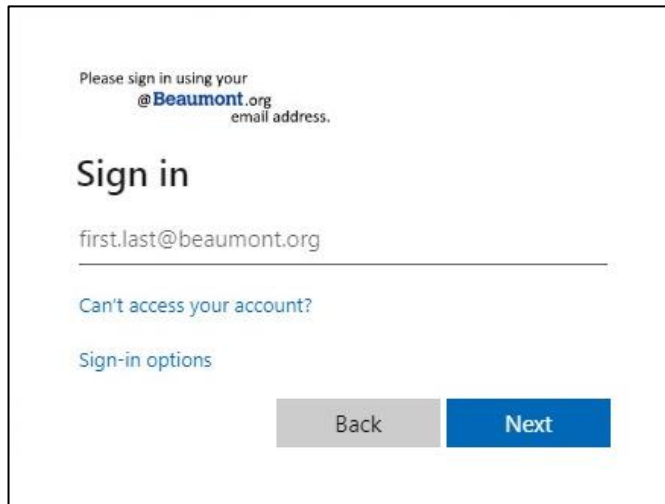
1. **Click on Corewell Health Internal Account button.**

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
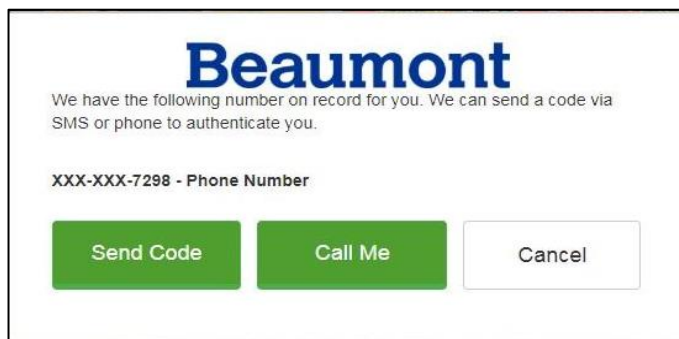
first.last@beaumont.org

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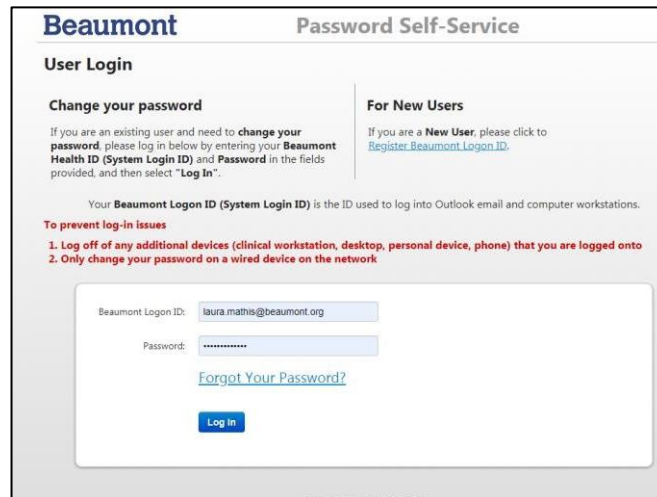
We have the following number on record for you. We can send a code via SMS or phone to authenticate you.

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.

Change Your Password: Independent Account
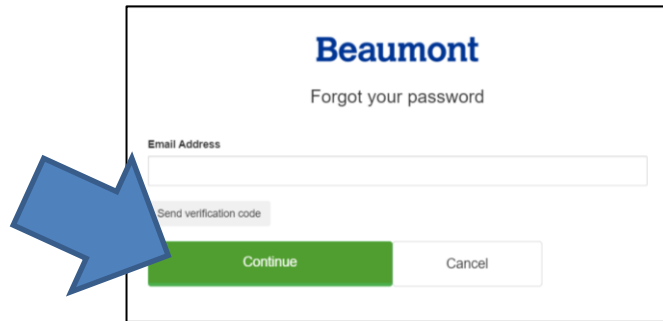
Office staff and physicians can change their password.

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

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

4. **Check your email account for an email from Microsoft.**
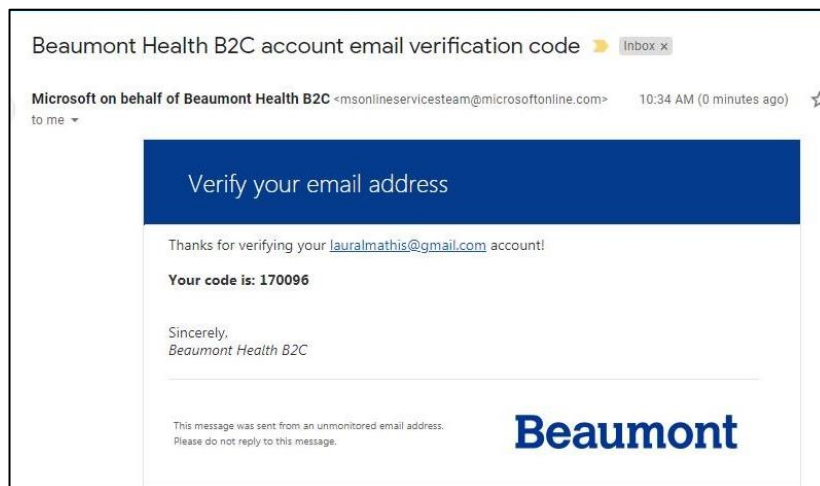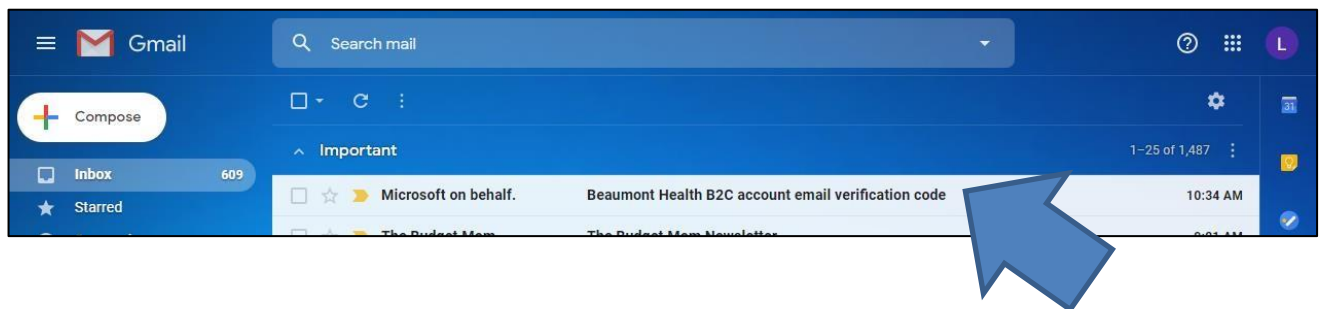
5. **Enter the code that was found in the email.**

6. **Click on "Verify code" button.**

7. **After the code has been verified, click "Continue"**
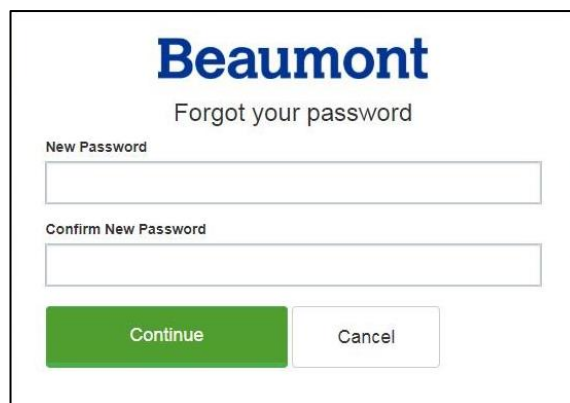
You will be asked to enter a second verification code through text or phone. The phone number you entered upon registration with your account will show up as the primary number for verification.
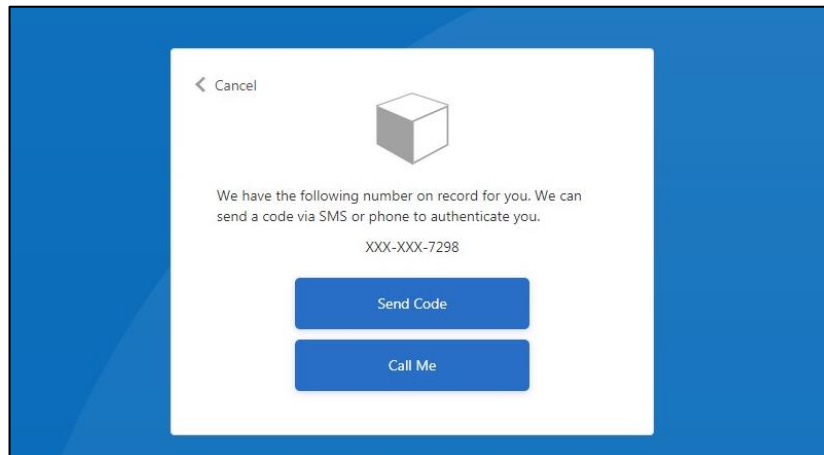
8. **Click on Send Code or Call me to verify your account. Enter the code given through your text message or verify your account through the phone.** Once you are verified, you can enter a new password. The password must be between 8 and 64 characters. The password must have at least 3 of the following: a lowercase letter, an uppercase letter, a digit, and / or a symbol.

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.**
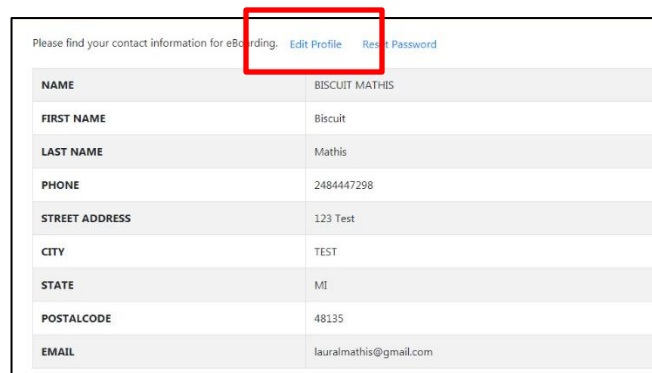
You are logged-in as Biscuit Mathis

My Case Entries

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

You do not have any pending case entries.
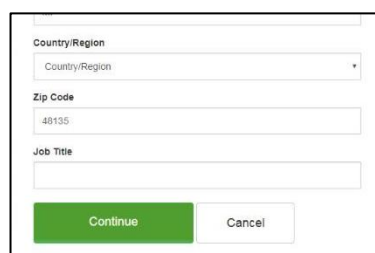
2. **Click on Edit Profile.**

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	View
LAURA MATHIS Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	1/17/2020 9:09 AM	View
laura mathis Female	(248) 598-6959	Pending			MOHAMAD A SOBH DO-1003030685	Laura.Mathis@beaumont.org	1/15/2020 1:59 PM	View

Showing 1 to 3 of 3 entries   Previous   1   Next

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.

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	📁 View
LAURA MATHIS Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	1/17/2020 9:09 AM	📁 View
laura mathis Female	(248) 598-6959	Pending			MOHAMAD A SOBH DO-1003030685	Laura.Mathis@beaumont.org	1/15/2020 1:59 PM	📁 View

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	🗀 View
LAURA MATHIS Female	(248) 444-7298	Pending				Laura.Mathis@beaumont.org	1/17/2020 9:09 AM	🗀 View
laura mathis Female	(248) 598-6959	Pending			MOHAMAD A SOBH DO-1003030685	Laura.Mathis@beaumont.org	1/15/2020 1:59 PM	🗀 View

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.
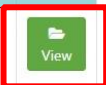
Submitted Cases Tab

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	📁 View
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	📁 View

Showing 1 to 2 of 2 entries   Previous   1   Next

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

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

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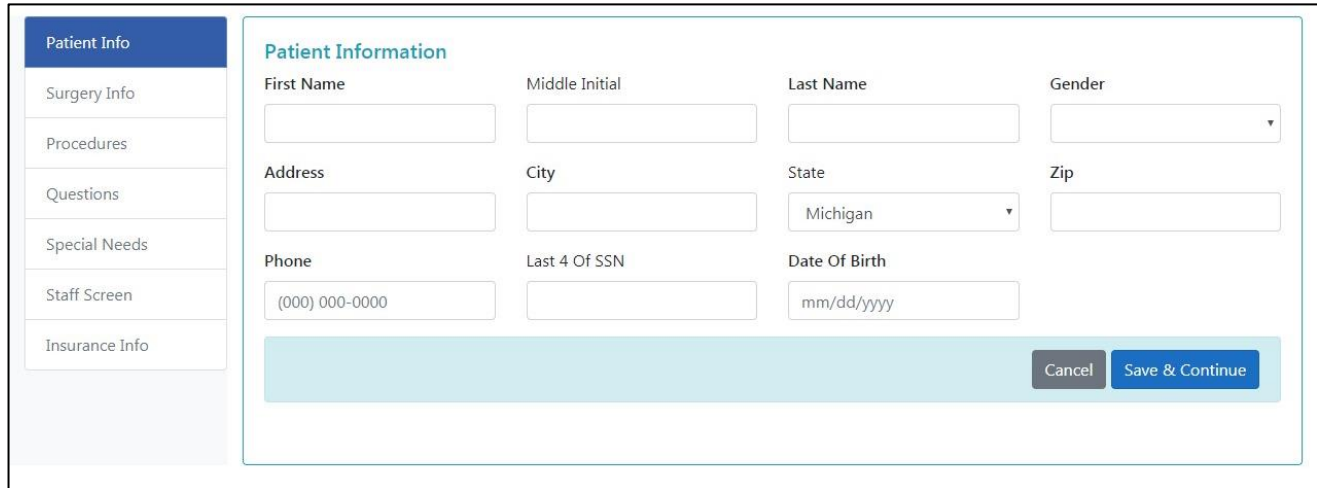
The sections do NOT auto-save, you must click "Save & Continue" before moving to the next section to save the information you have entered.
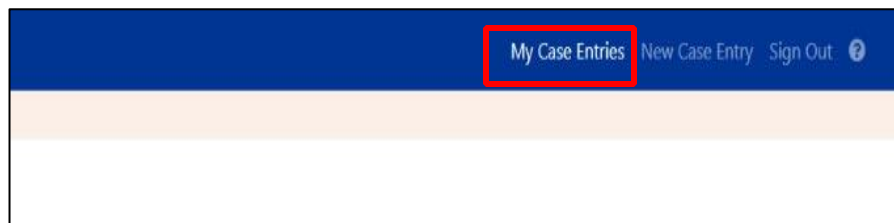
Patient Info Screen

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

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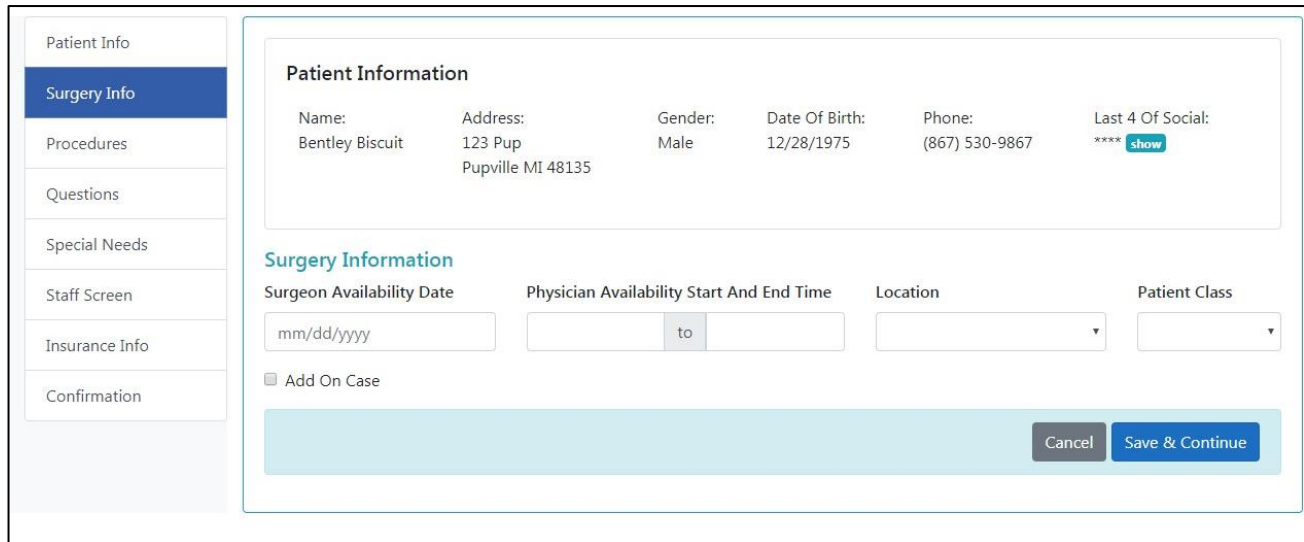
Please remember cases cannot be submitted until all required fields for each section are entered.

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 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	**** show

Surgery Information

Surgeon Availability Date	Physician Availability Start And End Time	Location	Patient Class
mm/dd/yyyy	[ ] to [ ]	[▾]	[▾]
The Surgeon Availability Date field is required.	The Start Time field is required. The End Time field is required.	The Location field is required.	The Patient Class field is required.
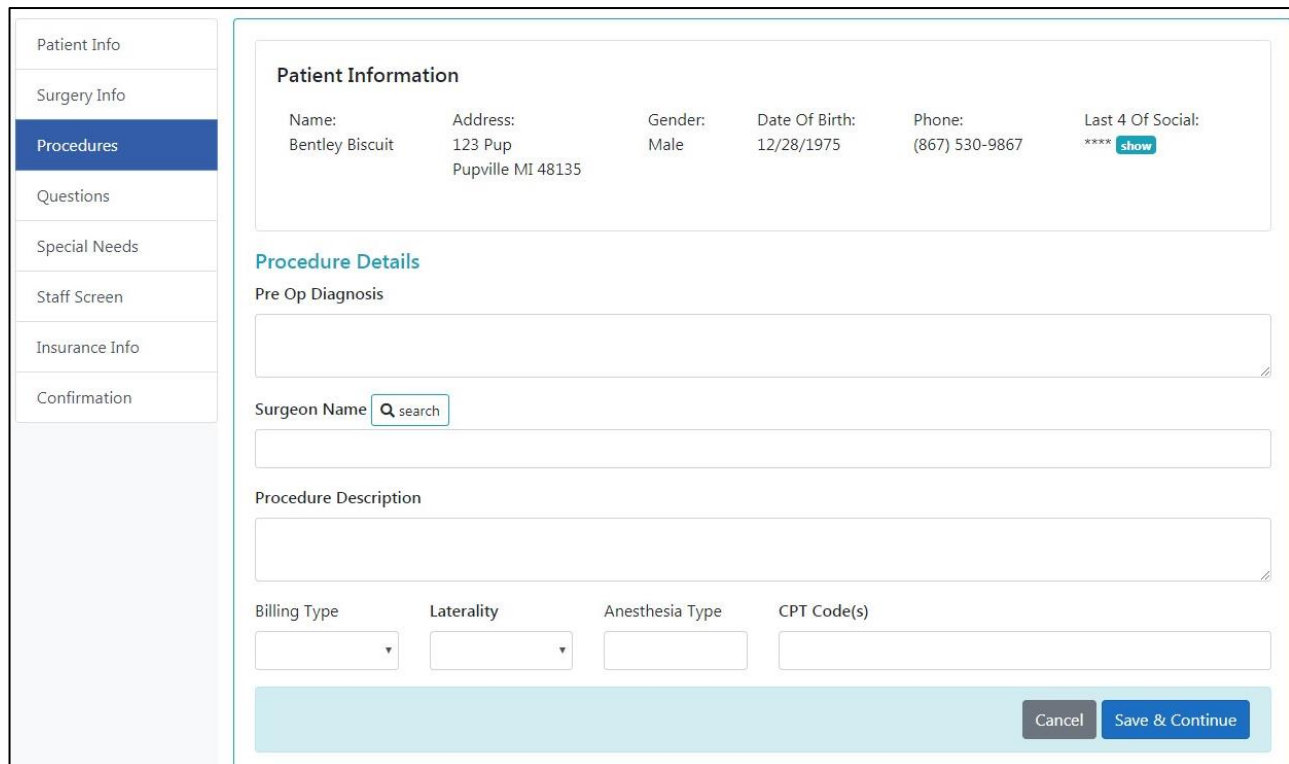
☐ Add On Case

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

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	Anesthesia Type	CPT Code(s)
▾	▾		
	The Laterality field is required.		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.

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

Surgery to remove tumor
insert stint

Surgeon Name 🔍 search

VISHAL K PATEL MD-1083877294

The Surgeon Name field is required.

Procedure Description

Remove tumor on lung

Billing Type

▼

Laterality

Left ▼

Anesthesia Type

CPT Code(s)

1032, 1259

Cancel   Save & Continue

Questions Screen

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

The following fields are required

- **ERAS (enhanced recovery after surgery)**
- **Latex Allergies**
- **Needs Interpreter**

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	Male	12/28/1975	(867) 530-9867	**** show
	Pupville MI 48135				

Special Needs

Equipment Request	Instrument Request	Implant Request	Positioning Request
▼			▼

Laser Request	Supply Request	Bed Or Table Request	Pre Surgical BlockType
▼		▼	▼

Other Request

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	Male	12/28/1975	(867) 530-9867	**** show
	Pupville MI 48135				

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 being typing the carrier's name to find the proper insurance carrier.

Patient Info	**Patient Information**
Surgery Info	
Procedures	Name: Address: Gender: Date Of Birth: Phone: Last 4 Of Social:
Questions	Bentley Biscuit 123 Pup Male 12/28/1975 (867) 530-9867 **** show
Special Needs	Pupville MI 48135
Staff Screen	**Insurance**
Insurance Info	Carrier Subscriber ID Pre Authorization Number
Confirmation	The Carrier field is required.
	Cancel Save & Continue

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   My Case Entries   **New Case Entry**   Manage ▾   Sign out ?

You are logged-in as Mathis, Laura L

Patient Info	**Patient Information**
Surgery Info	
Procedures	Name: Address: Gender: Date Of Birth: Phone: Last 4 Of Social:
Questions	Bentley Biscuit 123 Pup Male 12/28/1975 (867) 530-9867 **** show
Special Needs	Pupville MI 48135
Staff Screen	**Insurance**
Insurance Info	Carrier Subscriber ID Pre Authorization Number
Confirmation	Other, self pay
	Cancel Save & Continue

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.

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	CHEeboardingrossepointe@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

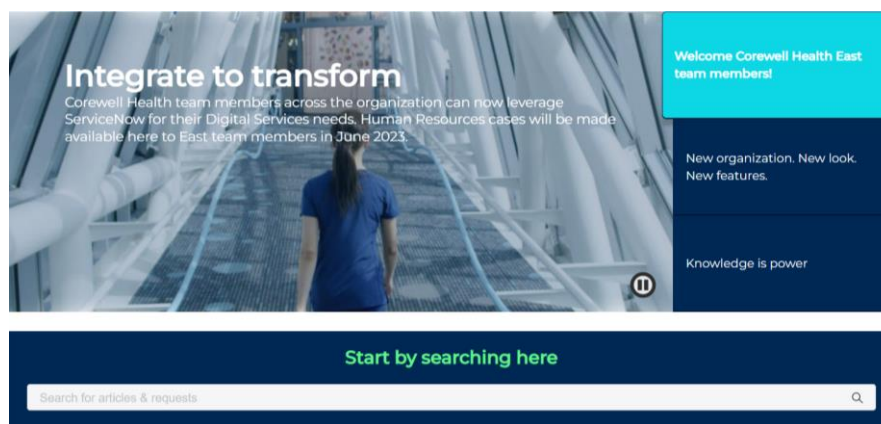| Location	Phone Numbers	Email
Trenton	Hospital Boarding Office 734-671-3265 Surgery 734-642-2266	CHEeboardingtrenton@corewellhealth.org
Troy	248-964-8440	CHEeboardingtroy@corewellhealth.org
Wayne	734-467-4033	CHEeboardingwayne@corewellhealth.org

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.**

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.