



Online Check-In and Scheduling — Skip the Clipboard

————— An Extended Guide · No. 1758 —————

Tech Made Simple. Service Made Personal.

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SUMMARY

The 60-Second Version

If you read one page first, make it this one. Most doctor's offices now use an online patient portal — you may know it as MyChart or by another name. A few days before your appointment, it lets you do "eCheck-in": confirm your address and insurance, look over your medicine and allergy lists, sign the usual forms, answer a few questions, and pay a copay if one is due.

- eCheck-in usually opens a few days before the visit — often about three days, sometimes up to a week.
- You can also book, reschedule, and cancel many appointments right in the portal, and join a video visit from the same place.
- Doing it ahead means you walk in already checked in — you just tell the front desk you've arrived.
- If online scheduling isn't offered for the kind of visit you need, the portal will tell you to call — and that's fine.

WATCH OUT

This guide is about the technology — the buttons and the screens — not about your health. When the portal shows you a medicine list or a question about your symptoms, I can help you find and tap the right thing, but what those answers should be is a conversation for your doctor or nurse. If you feel truly unwell, don't wait for an appointment — call the office, or 911 in an emergency.

THE BASICS

1. What Online Check-In Actually Is

The front-desk clipboard, moved to your couch.

Picture everything the front desk usually asks you to do before a visit: confirm who you are, show your insurance card, update your address and phone, list your medicines, sign a privacy form, hand over a copay. Online check-in — often called "eCheck-in" — is that same list of chores, done on your phone or computer a few days early, through your patient portal.

Nothing about it is new or extra. You're not adding a task; you're moving one you already do out of the lobby and into your living room, where you have your reading glasses, your insurance card in the drawer, and all the time in the world.

GOOD TO KNOW

The "e" in eCheck-in just means "electronic" — done on a screen. It's the same idea as checking in for a flight online the night before instead of waiting at the airport counter.

WHY BOTHER

2. Why It's Worth the Few Minutes

Mostly: you reclaim your waiting-room time.

The payoff is simple. When you've checked in ahead, you arrive and the desk doesn't hand you anything — you say your name, they see you're already set, and you sit down. No clipboard, no squinting at tiny print with a line behind you, no digging for your insurance card while the receptionist waits.

- You do it calmly at home, not rushed in a waiting room.
- You can check the exact spelling of a medicine against the bottle in your cabinet.
- If a copay is due, it's already paid — no fumbling with a card at the window.
- The office has your updated information before you walk in, so fewer surprises.

It won't always make the doctor run on time — nothing does that. But it takes one reliable chunk of friction out of the day, and that's worth a few minutes the night before.

THE WINDOW

3. When eCheck-In Opens

A few days before — not weeks, not the morning of.

You can't check in the moment you book. The portal opens the eCheck-in option a few days before your visit — commonly about three days ahead, though some health systems open it as much as a week out, and a few only in the last day or two. Before that window, the button simply isn't there yet.

So if you look for it right after scheduling and don't see it, nothing is wrong. Check back closer to the appointment. The most reliable sign is the appointment itself: when you open it in the portal and an "eCheck-in" button has appeared, the window is open.

TIP

Pick an evening a day or two before the visit and make it your check-in time. You're relaxed, you're not racing the clock, and if something needs a phone call to the office, they're still open the next morning.

WHERE

4. Finding Check-In in the Portal

Look under appointments or visits.

Every portal arranges its menus a little differently, so I'll describe the pattern rather than exact words. After you sign in, look for a section about your appointments — it may be called "Visits," "Appointments," or shown as a card right on the home screen listing what's coming up.

- 1 Sign in to the portal on your phone app or in a web browser.
- 2 Find your upcoming appointment, usually near the top.
- 3 Open it by tapping it, then look for an "eCheck-in" button.
- 4 Tap that button to start; the rest walks you through screen by screen.

GOOD TO KNOW

Menu labels vary by health system — Cleveland Clinic, University Hospitals, and Summa all use the MyChart style but may word things slightly differently. If you're stuck, your provider's MyChart help page or a quick call to the office clears it up fast.

YOUR DETAILS

5. Confirming Your Personal Information

Address, phone, and who to call in an emergency.

The first screen usually shows what the office has on file for you — your home address, phone number, email, and often an emergency contact. Your only job is to read it over and either confirm it's right or fix what's changed.

- Check your address — especially if you've moved or spend winters elsewhere.
- Make sure the phone number is the one you actually answer.
- Confirm the emergency contact is still the right person with the right number.
- If something's wrong and the screen won't let you edit it, note it and tell the front desk when you arrive.

TIP

Keeping your phone number current matters more than it looks. That's the number the office uses for reminders, for a nurse calling back, and for telling you a result is ready. A wrong number there is a missed message later.

INSURANCE

6. Checking Your Insurance on File

The card in the drawer, matched to the screen.

Next comes insurance. The portal shows the plan it has on record — the company name, your member number, often the group number. Pull out your actual card and compare the two, line by line. This is the single thing most likely to cause a billing headache later if it's out of date.

Many portals also let you take a photo of the front and back of your card and upload it right there. If yours offers that and your card is newer than what's on file, snap the pictures — it saves the desk from doing it when you arrive.

GOOD TO KNOW

If your insurance changed since your last visit — a new plan at the new year, a switch to a Medicare Advantage plan — this is exactly where to catch it. A visit billed to an old plan can turn into a letter and a phone call you'd rather skip.

MEDICINES

7. Reviewing Your Medication List

Read it against the bottles on the counter.

The portal will show the list of medicines it believes you take. Here's where being at home pays off: you can line the bottles up on the kitchen counter and check the list against them, one by one, without anyone waiting on you.

- Look for anything on the list you've stopped taking.
- Look for anything you now take that isn't listed — including over-the-counter pills and vitamins.
- Note any dose that's changed since your last visit.
- Most portals let you mark items or add a note; if not, keep a written list to hand the nurse.

WATCH OUT

I can help you find the list and tap through it, but I can't tell you what to take or change. Never start, stop, or adjust a medicine based on what a screen shows. Bring any mismatch to your doctor or nurse — getting that list right is their job and yours together, not the portal's.

ALLERGIES

8. Confirming Your Allergies

A short list that matters a great deal.

Right after medicines, most check-ins show your allergies — the drugs or substances that have caused you trouble, and what kind of reaction. It's usually a short list, but it's one of the most important things in your whole record, so give it a real look rather than clicking past it.

If you've had a bad reaction to a medicine since your last visit, this is the place to make sure it's captured. If the screen only lets you confirm and not add, write it down and say it out loud to the nurse — don't assume it made it in.

GOOD TO KNOW

"No known allergies" is a real and fine answer if that's your situation. The point isn't to list something; it's to make sure what's there is accurate and nothing important is missing.

FORMS

9. Signing the Forms

The consents and notices, done with a tap.

Every so often a visit comes with forms to sign — a privacy notice, a general consent to be treated, sometimes a financial agreement. The portal presents these as documents you read and then sign electronically, usually by typing your name or tapping a box that says you agree.

- Read what you're signing, the same as you would on paper.
- An electronic signature is just as real as an ink one.
- Some forms you sign once a year, not every visit.
- If a form confuses you, you can skip it and ask about it at the desk rather than signing something unclear.

TIP

If the fine print is too small on your phone, pinch the screen to zoom in, or do the check-in on a computer or tablet where the text is bigger. You're allowed to take your time; nothing is timing you.

THE COPAY

10. Paying a Copay Ahead of Time

If one's due, settle it before you go.

If your plan has a copay for the visit, the check-in often lets you pay it right then with a card, so there's nothing to handle at the window. You'll see the amount owed and a place to enter a card, the same as any online payment.

- The amount shown is your copay for this visit — not a surprise bill for something else.
- Paying ahead is optional at some offices and expected at others; the screen will tell you.
- You'll usually get a receipt in the portal or by email.
- If the amount looks wrong, don't pay it — call the office's billing line and ask.

WATCH OUT

Only ever enter card details inside the real portal you signed into — never from a link in a text or email claiming you owe money for a visit. If a message pushes you to "pay now" through a link, don't. Open the portal yourself, or call the number on your statement.

QUESTIONS

11. Answering the Pre-Visit Questionnaires

The clipboard questions, as taps on a screen.

Many check-ins include a short questionnaire — the kind of thing a nurse used to ask or hand you on paper. It might ask how you've been feeling, whether you've had a fall, questions about your mood, or details specific to why you're coming in. You answer by tapping choices or typing a short reply.

Answer honestly and plainly; these go to your care team and help them prepare for your visit. If a question doesn't apply or you'd rather talk about it in person, you can usually skip it or say so at the visit. Nothing here replaces the actual conversation with your doctor.

WATCH OUT

Some questionnaires ask about serious things — mood, safety at home, thoughts of harming yourself. If any question stirs something up, please don't sit with it alone. Tell your doctor's office, and in a crisis call or text 988 in the U.S., or 911 for an emergency.

DONE

12. What "Check-In Complete" Looks Like

Knowing you actually finished.

When you've gone through all the screens, the portal shows a confirmation — a message like "You're checked in" or a green check mark on the appointment. That's your sign it took. The appointment in your list will usually now say checked in or show the forms as complete.

If you had to stop partway — the phone rang, something needed looking up — most portals save your progress so you can pick up where you left off. Just reopen the appointment and tap eCheck-in again; it won't make you redo the parts you finished.

GOOD TO KNOW

Finishing eCheck-in doesn't move your appointment time or guarantee you're seen faster — it just means the paperwork is done. The clock still starts when you arrive and tell the desk you're there.

DAY OF

13. At the Office, After You've Checked In

One thing you still have to do in person.

Here's the part people miss: eCheck-in does the paperwork, but it does not tell the office you've physically arrived. You still need to let them know you're there — either by stopping at the front desk and saying your name, or by tapping in at a lobby kiosk or on your phone if that office uses one.

- Walk up to the desk and say you're here for your appointment.
- They'll see you're already checked in and wave you through quickly.
- Some offices send a "you've arrived" button to your phone when you reach the building — tap it if you get it.
- If you're not sure whether they know you're there, just ask. Better than sitting unseen.

WATCH OUT

Don't assume a silent waiting room means they've forgotten you — but don't assume they know you're there either. A five-second word with the desk settles it and can save you half an hour of wondering.

BOOKING

14. Booking an Appointment Online

Many routine visits, without the phone tree.

Beyond checking in, most portals let you book certain appointments yourself — routine follow-ups, annual wellness visits, flu shots, and visits with a provider you already see. You find the scheduling section, pick what kind of visit you need, and the portal shows you open times.

- 1 Open the appointments or "schedule a visit" section of the portal.
- 2 Choose the type of visit, and the provider or location if asked.
- 3 Enter a range of dates and times that work for you.
- 4 Pick an open slot from the list it shows, and confirm.

GOOD TO KNOW

Not every kind of visit can be booked this way. A brand-new problem, a specialist that needs a referral, or a complicated issue often has to go through the office so they can match you to the right person and the right amount of time.

CHOOSING

15. Picking the Right Slot

Provider, place, and a time you'll keep.

When the list of open times comes up, you often have a few choices to make: which provider, which office if the practice has more than one, and whether you want it in person or by video. Take a moment on each — the goal is an appointment you can comfortably get to and keep.

- If you have a regular doctor, book with them when you can for continuity.
- Choose the location that's easiest for you to reach, not just the soonest.
- Think about traffic and parking when you pick a time of day.
- If in-person and video are both offered, pick whichever fits the reason you're going.

TIP

The very first open slot isn't always the best one. A time you have to rush to is a time you might miss. It's fine to scroll down for one that fits your day with a little room to spare.

CHANGE IT

16. Rescheduling Without Calling

Move a visit to a time that works better.

Plans change. Most portals let you move an existing appointment to a new time yourself, as long as it's one the office allows you to reschedule online. You open the appointment, look for a "reschedule" option, and pick a new slot the same way you booked the first one.

- A reschedule button only shows up on visits you're allowed to move online.
- If you don't see it, the visit type needs a call — that's not an error.
- Moving it online frees the old slot for someone else automatically.
- You'll get a fresh confirmation for the new time; check it lands right.

GOOD TO KNOW

Rescheduling well ahead is a kindness that comes back around. The sooner you free a slot, the likelier someone else can use it — and the likelier a good time is still open for you.

CANCEL

17. Cancelling Online — and Doing It Early

Free the slot the moment you know.

If you can't make a visit at all, cancelling in the portal is usually a tap or two — open the appointment, choose cancel, and confirm. The one rule worth remembering: do it as soon as you know, not the morning of. Offices often close online cancelling in the last stretch before the time.

- Cancel as early as you can; it opens the slot for another patient.
- Very close to the appointment, the portal may make you call instead.
- Some practices charge for a no-show or a very late cancel — ask if you're unsure.
- If you still need the care, reschedule rather than just cancelling, so it doesn't slip away.

WATCH OUT

Don't just not show up. A silent no-show can mean a fee, and it holds a slot another patient needed. Thirty seconds to cancel in the portal saves everyone the trouble — and keeps you in good standing with the practice.

NO ONLINE

18. When Online Scheduling Isn't Offered

Sometimes a call really is the right door.

Not everything can be booked or changed online, and that's by design, not a flaw. New problems, urgent concerns, procedures, and some specialist visits route through a person so they can ask a question or two and get you to the right place. When that's the case, the portal will often give you a "request" option or simply a number to call.

- A "request appointment" button sends a message and waits for the office to call back.
- For anything that feels urgent, call rather than wait on a request.
- Have your calendar and a pen ready when you call so you can lock a time.
- If you reach a menu, listen for "scheduling" or "appointments."

TIP

When you do have to call, mid-morning or mid-afternoon is often quieter than right when the office opens. And if you'd rather not navigate a phone menu alone, that's exactly the kind of thing I'm glad to sit with you for.

VIDEO

19. Joining a Video Visit From the Portal

The same place you checked in is where you join.

If your appointment is a telehealth video visit, the nice part is that it usually lives in the same spot as everything else — you open the appointment in the portal, and when it's time, a "begin visit" or "join video" button appears right there. For many video visits, eCheck-in is required first, so the two go hand in hand.

- 1 Do the eCheck-in ahead, the same as any visit.
- 2 A little before the time, open the appointment again.
- 3 Tap "begin visit" or "join video" when it appears.
- 4 Allow the app to use your camera and microphone if it asks.

GOOD TO KNOW

There's a separate guide in this series just on getting ready for a video visit — testing your camera, lighting, and where to sit. This one's only about finding the join button in the portal; ask me for the other if you'd like it.

REMINDERS

20. Turning On Appointment Reminders

Let the office nudge you so you don't have to remember.

The portal can send you reminders about an upcoming visit — by text message, by email, or as a little alert from the app on your phone. These are usually something you turn on once in your settings, and then they just happen for every appointment after that.

- Look in account settings for "communication preferences" or "notifications."
- Choose text, email, or app alerts — whichever you actually notice.
- Reminders often let you confirm or cancel right from the message.
- Pick the one method you check most; two or three can get noisy.

GOOD TO KNOW

A text reminder is the one most people actually see. If you get a reminder text, read it before deleting — it often has the time, the location, and a link to check in, all in one place.

CALENDAR

21. Getting It Onto Your Calendar

So it lives next to the rest of your week.

A reminder is helpful, but many people also like the appointment sitting in their own calendar — the one on the fridge or the one on the phone. Some portals offer an "add to calendar" link on the appointment that drops it straight into your phone's calendar. If yours doesn't, it takes ten seconds to add it by hand.

- Look on the appointment screen for an "add to calendar" link and tap it.
- If there isn't one, open your calendar app and type the appointment in yourself.
- Include the address and the office phone number in the calendar note.
- Set your own alert a day ahead if you want a second nudge.

GOOD TO KNOW

Not every portal has an add-to-calendar button, and that's fine. Typing it into your own calendar once means it shows up right beside lunch with a friend or the grandkids' game — where you'll actually see it.

STAY CURRENT

22. Keeping Your Information Up to Date

A little upkeep between visits saves hassle at them.

You don't have to wait for a visit to fix your details. The portal lets you update your address, phone, pharmacy, and insurance any time from the settings or profile section. A few minutes once in a while means eCheck-in is almost nothing to do when the next appointment rolls around.

- Update your address and phone whenever they change, not just at check-in.
- Keep your preferred pharmacy current so prescriptions go to the right place.
- Add new insurance as soon as a plan changes, especially at the new year.
- Check that your emergency contact is still someone reachable.

WATCH OUT

Tie it to something you already do — when you get a new insurance card in the mail, or when you change pharmacies, make updating the portal part of the same little chore. Done in the moment, it never piles up.

PHONE OR PC

23. Doing It on a Phone vs. a Computer

Both work; pick what's comfortable for your eyes.

You can do all of this on the portal's phone app or in a web browser on a computer or tablet — the steps are the same, just laid out to fit the screen. The phone app is handy because reminders and the "join video" button land right on it. A computer gives you a bigger view for reading forms and typing.

- Phone app: best for reminders, quick check-in, and video visits.
- Computer or tablet: easier on the eyes for reading forms and long questions.
- You can start on one and finish on the other; it's the same account.
- On a phone, pinch to zoom; on a computer, make the text bigger in the browser.

GOOD TO KNOW

There's no wrong choice here. Use whichever device you're already comfortable with. The portal doesn't care, and your information is the same either way.

NEW PATIENT

24. Checking In for a First Visit

A bit more to fill in the first time.

If you're a new patient at a practice, the first check-in asks for more than a returning one — your full history isn't on file yet, so expect more screens about past conditions, surgeries, family history, and the like. It takes longer that one time, and then it's short forever after.

- Set aside a bit more time for a first-ever check-in.
- Have your medicine bottles, insurance card, and a pharmacy name handy.
- It's fine to write "not sure" and sort details out with the nurse in person.
- Save your progress and come back to it if you need a break.

TIP

For a first visit, give yourself a quiet half hour rather than doing it on the fly. Having your history roughly right from the start makes every visit after it smoother.

SEVERAL

25. Juggling More Than One Appointment

Or checking in for family you help.

If you've got a few visits coming up — a doctor, a specialist, a lab — the portal lists them all, each with its own check-in when its window opens. Do each one as its window arrives; they don't all open at once, and you can't rush the ones that aren't ready yet.

If you help a spouse or a parent and have proxy access to their portal, you can usually switch between your account and theirs to check them in too. Just be sure you're looking at the right person's name at the top before you start confirming medicines and insurance.

WATCH OUT

When you manage more than one person's portal, double-check whose record is on the screen before you answer anything. It's an easy slip to confirm your own medicines on your spouse's check-in. The name is usually at the very top — glance at it first.

WAITLIST

26. Asking to Be Seen Sooner

The quiet feature that moves your date up.

Sometimes the soonest appointment online is weeks out, but cancellations open up all the time. Some portals have a waitlist or "notify me of earlier openings" option — you say you'd take a sooner slot, and the system messages you if one frees up. It's worth turning on if you'd like to be seen earlier.

- Look for a "join waitlist" or "earlier appointment" option when you book.
- You keep your booked slot unless you accept an earlier one.
- When an opening is offered, it often goes to whoever answers first — so reply promptly.
- Not every practice offers this; if you don't see it, a polite call can do the same.

TIP

If you turn on earlier-opening alerts, make sure your reminders are on too, and keep your phone nearby. These offers can come and go in a few hours, so a fast yes is what gets you the slot.

FIX-IT

27. When the Check-In Won't Cooperate

A calm checklist before you give up.

Now and then a screen won't load, a button is grayed out, or the app just spins. Nine times out of ten it's something small. Work through the simple fixes before you decide the whole thing is broken.

- 1 Make sure you're connected to Wi-Fi or have a good signal.
- 2 Close the app or browser tab fully and open it again.
- 3 Check that the eCheck-in window is actually open yet — it may be too early.
- 4 Try the other device: if the phone balks, try a computer, or the reverse.
- 5 Still stuck? Call the office — you can always check in the old way at the desk.

GOOD TO KNOW

If online check-in won't work, you have lost nothing. Just arrive a few minutes early and check in at the front desk the way you always have. The online version is a convenience, never the only way in.

GRAYED OUT

28. Why a Button Might Be Missing

The usual harmless reasons.

It's common to go looking for eCheck-in, reschedule, or cancel and find the button simply isn't there. Before you worry, know that this is almost always on purpose, not a glitch. The portal hides options that don't apply to a particular visit.

- No eCheck-in yet: the window hasn't opened — check back closer to the date.
- No reschedule: this visit type has to be changed by phone.
- No cancel: you're too close to the time, so call instead.
- Nothing at all: you may be signed into the wrong person's account — check the name up top.

TIP

A missing button is information, not a dead end. It's the portal's way of saying "this one goes through a person." Pick up the phone and you'll get the same thing done.

PRIVACY

29. Who Sees What You Type In

It goes to your care team, under the same rules.

Everything you confirm or enter during check-in flows into the same protected medical record your office already keeps, covered by the same privacy laws as the rest of your chart. It's for your care team, not for marketers, and not for anyone without a reason to see it.

- Your answers go to the practice, the same as if you'd written them on paper.
- Sign in on your own device when you can, not a shared or public computer.
- If you check in on someone else's screen, sign out fully when you're done.
- You can ask the office for its privacy notice any time.

GOOD TO KNOW

The portal is a safer place for your details than a clipboard left on a counter where the next patient can glance at it. Your sign-in is what keeps it yours.

WORRIES

30. Common Worries, Answered

The things people actually ask me.

"If I check in online, do I still have to show up early?" A little early is still smart, but you won't need the extra paperwork time — just enough to park and tell the desk you're there.

"What if I make a mistake on a screen?" You can usually go back and fix it, and the nurse reviews it all anyway. One wrong tap won't cause harm.

"Do I have to do it online?" Never. The front desk will always check you in the old way. Online is an option, not a requirement.

"Will it move my appointment up?" No — it only does the paperwork ahead. Your time stays the time you booked.

FOR THE HELPER

31. A Note for the Family Helper

If you check in for a parent or spouse.

If you're the one handling this for a parent or spouse, the smoothest setup is proxy access — your own sign-in that lets you see and act on their portal with their permission. Then you can check them in, book visits, and get their reminders without juggling their password.

- Set up proxy access properly rather than sharing a password.
- Confirm medicines and allergies with the person, not from memory.
- Put their appointments on a shared calendar so nobody double-books.
- There's a companion guide in this series on getting proxy access to a parent's portal — ask me for it.

GOOD TO KNOW

The kindest setup is one the person can still see and understand, with you as the steady backup. Proxy access keeps it their record and their care, with your help where it's wanted.

MYTHS

32. A Few Myths, Cleared Up

What online check-in is — and isn't.

"Checking in online means I skip the line and get seen first." No — it only skips the paperwork. Your appointment time is still your time.

"An electronic signature doesn't really count." It does. It's legally a real signature, same as ink on paper.

"If I start it, I have to finish it right then." No. Most portals save your place so you can come back later.

"Doing it online replaces talking to the nurse." It doesn't. The nurse still reviews everything and asks you in person.

A DAY

33. A Day in the Life

What this really looks like.

Here's how it goes on an ordinary week. Three days before your Thursday appointment, a text reminder lands on your phone. That evening, after dinner, you open the portal, tap eCheck-in, and spend five minutes confirming your address, glancing at your medicine list against the bottles, signing the one form, and paying the small copay. A green check mark says you're done.

Thursday, you drive over, park, and walk in. You tell the woman at the desk your name; she sees you're already checked in and says "have a seat, he'll be right with you." No clipboard, no card to hand over, no digging for anything. You sit down with your magazine, and that's the whole of it.

GOOD TO KNOW

The goal isn't to make you do more. It's to move the fiddly part to a calm moment at home, so the visit itself is just the visit — the part that actually matters.

SAFETY

34. When to Skip the Portal and Just Call

Some things don't belong in a check-in box.

The portal is wonderful for the routine, but it's the wrong tool for anything urgent. It is not monitored minute to minute, and a message or a questionnaire answer may not be read for a day or more. So I'll say it plainly: the portal is for planning, not for emergencies.

WATCH OUT

Never use a pre-visit questionnaire or a portal message to report an emergency. If you have chest pain, trouble breathing, signs of a stroke, or you feel something is very wrong, don't type it into a box and wait — call 911. For an urgent but non-emergency concern, call your doctor's office directly.

YOUR SAY

35. You're in Charge the Whole Way

The portal serves you, not the other way around.

It's worth remembering that none of this is required and all of it is reversible. You can do as much or as little online as you like, correct anything that's wrong, and always fall back on talking to a real person at the desk or on the phone. The technology is there to save you time, not to box you in.

- You can always check in, book, or cancel the old-fashioned way.
- You can fix or question anything the screen shows you.
- You can ask the office to walk you through it the first time.
- If a screen ever feels pushy or wrong, stop and call — trust that instinct.

TIP

If you'd like a friendly hand the first time through — getting signed in, finding the buttons, setting your reminders — that's exactly the kind of thing I'm glad to sit with you for, at your kitchen table, until it feels easy.

YOU'RE NOT ALONE

36. You Don't Have to Do This Alone

A friendly, patient person is one call away.

I hope this guide made online check-in and scheduling feel a little less daunting and a lot more doable. Keep it in a drawer with your other home papers, come back to a page whenever you need it, and don't worry about memorizing anything. Nobody expects you to.

When you'd rather have a hand, that's exactly what I do. I come to your home, work at your pace, and never make you feel rushed or silly for asking. A first visit is a flat ninety-nine dollars, and for the parts that don't need me on-site I can often help right on your screen for less. Every visit comes with a 30-day, come-back-free guarantee.

I'm a patient tech helper — not a doctor, nurse, or your insurance company — so I stick to the technology: the apps, the logins, the cameras, the gadgets and getting them talking to each other. Anything about your health, your medicines, or what a number means, I'll always point you back to your doctor or nurse.

GOOD TO KNOW

When you call, I answer — or Sophie, my friendly AI helper, takes a message so nothing gets lost. Sophie isn't a runaround; she's just making sure I call you back.

TIP

Call or text me at (330) 200-8042, or visit BillsHomeTech.com. Serving Atwater and all of Portage County, with 30+ years of patient, plain-English tech help. If you're ever not 100% happy with a visit, I'll make it right or refund it. That's a promise. — Bill

CHEAT SHEET

Everyday Cheat Sheet

Keep this by your computer or phone.

- eCheck-in opens a few days before your visit — look for the button on the appointment.
- Confirm address, insurance, medicines, and allergies; sign forms; pay the copay if due.
- Check your medicine list against the bottles on the counter.
- You still have to tell the front desk you've arrived — eCheck-in doesn't do that.
- Book, reschedule, and cancel online when the button's there; cancel early to free the slot.
- No button? That visit type needs a phone call — that's normal, not an error.
- Turn on text or email reminders once in settings, and add visits to your own calendar.

- Never report an emergency through the portal. Call the office — or 911 in an emergency.

AT A GLANCE

A Picture to Follow Along

How eCheck-In Works

Done from your couch a few days early — not in the waiting room.



Illustration - a schematic, not to scale. Your setup may differ.

AT A GLANCE

A Second Look

Online, or Pick Up the Phone

Most of it you can do yourself; a few things still want a call.

	Do it online	Better to call
eCheck-in	A few days ahead	If it won't load
Book a visit	Many routine kinds	A new problem
Reschedule	Most appointments	Within a day of it
Cancel	Early, anytime	At the last minute
Video visit	Join from the portal	If the link fails

Illustration - a schematic, not to scale. Your setup may differ.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included.

Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: **billshometech.com/book** · **bill@billshometech.com**

This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.