

Reception cheat sheet

The front desk day: check in, book the next visit, check out.

- 1 Sign in**
Use the email and password your admin gave you. You land on Today.
- 2 Today page**
Arrived patients sit at the top. Still to arrive shows time, therapist and phone. Check In when they arrive, No Show if they never come.
- 3 Add a patient**
Patients, then Add Patient. Name, phone, date of birth, gender and emergency contact are required. Add insurer and policy number, or tick Company Patient for monthly billing.
- 4 Book an appointment**
Appointments, then Book Appointment. Pick patient, therapist, date, time, length and type. Press Check Availability so nobody is double booked.
- 5 Check in**
On Today, press Check In beside the patient. They move to the checked in group so the therapist can see them.
- 6 Check out**
Patient Checkout, Start Checkout, confirm the session is complete, choose the service, Create Invoice and Continue, take payment, book the next visit.
- 7 Invoices and payments**
Invoices lists every bill. Record Payment for cash, card, transfer or insurance. PDF, Email, and Claim pack for insurance patients.
- 8 Intake forms**
Tablet forms wait in Intake Review. Open one, check it, pick the medical professional, then Accept and create patient or Reject.
- 9 Schedule and reminders**
Weekly Schedule can be printed. Reminders lists tomorrow with a Call button. No-Show Tracking, Reschedule and Bulk Reschedule are in the sidebar.

If something looks wrong, ask your admin before you change it.