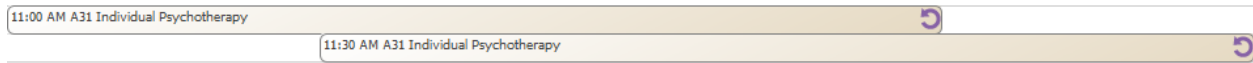


# Front Desk Process - Check In / Check Out via the Scheduling Calendar

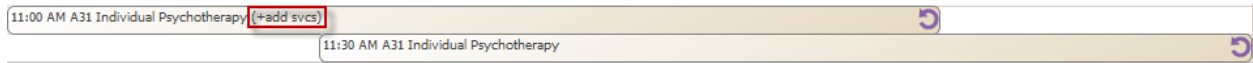
## Check In Process

→ Place **Appointments** on the Scheduling Calendar



→ Enter **Additional Services** at time of scheduling, or after check in (before check out)

(right-click on appointment and choose Additional Services—shows as + add svcs embedded into the appt)

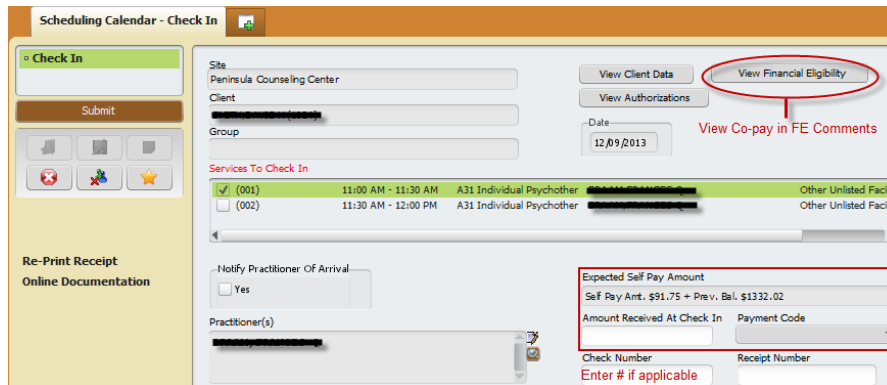


→ **Check in Appointment** with add ons attached to the original appointment

1. Right-click appointment and choose *Check In*.

- View Expected Self Pay Amount, enter Amount Received and choose Payment Code.

- View insurance Co-pay, if applicable, which is noted in the *View Financial Eligibility Comments*



- If funds are collected, a receipt is generated and the transaction is recorded on the Client Ledger

2. Once clicking Submit, the appointment appears as checked in on the calendar:



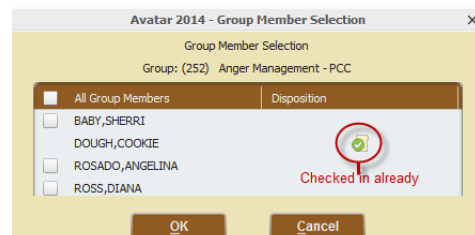
→ **Check In a Group:**

Prerequisites:

- Right-click on appointment and choose Details/Edit in order to make changes such as service code or duration
- Right-click on appointment and choose Add/Remove Group Members to add or remove clients
- Right-click on appointment(s) and choose Additional Services to enter add ons for individual clients in the group

1. Right-click appointment and choose *Check In*.

2. Select person(s) to check in.



➔ **Receipt** at Check In, Check Out, or via Deposit Entry automatically generated if funds are collected:

Run Date: 11/12/2013 11:15 AM Page 1 of 1

(Company Name)

Receipt #: PSCH-000008  
Receipt Date: 11/12/2013

Received From: ██████████ The Sum of \$40.00 ← total paid this visit

Forty Dollars and 00 / 100

Received by: \_\_\_\_\_

---

applied to prior balance

Type of Payment: 909-Cash Received in Payment w Receipt Payment Amount: \$1.76  
 For: A31 Individual Psychotherapy To: ██████████

Type of Payment: 909-Cash Received in Payment w Receipt Payment Amount: \$38.24  
 For: A31 Individual Psychotherapy To: ██████████

applied to balance on more recent charge

THANK YOU

### Accounting for Missed Visits

➔ Use **Status Update** to indicate **missed visit**, and change the appointment status to Cancelled (for individual appointments). **\*\*For group appointments, leave the appointment status as Scheduled so that it remains on the calendar for further status updates for the group.**

1. Right-click appointment and choose *Status Update*.

2. Once clicking Submit, the appointment disappears from the calendar:

### Reports:

- Missed Visit Appointment Report indicates missed visit
- Staff Productivity Report, Fail & Cancel Appointment Report (and other reports) will be accurate

 <b>Peninsula Counseling Center</b> 50 West Hawthorne Avenue Valley Stream, NY 11580				
<b>MISSED VISIT APPOINTMENT REPORT</b> <b>EXCLUDES ATTENDED BUT NOT BILLED</b> PCC-MHC Pre-Admit Valley Stream From Date 11/11/2013 to 11/11/2013 <span style="float: right;">Smith, David H (1024)</span>				
Client name	DOS	Group Name	Missed Visit Code	Practitioner Name
██████████	11/6/2013	Unknown	Called / Cancelled	██████████
<b>Total</b>	<b>1</b>			

 <b>Peninsula Counseling Center</b> 50 West Hawthorne Avenue Valley Stream, NY 11580						
<b>CANCEL &amp; FAIL APPOINTMENT REPORT</b> PCC-MHC Pre-Admt Valley Stream From Date 11/11/2013 to 11/12/2013						
Practitioner Name	Client ID	Client name	DOS	Service Code	Service Description	Missed Visit Code
██████████	██████	██████████	11/6/2013	9080631APG	A31 Individual Psychotherapy	Called / Cancelled

**Note:** The missed visit will not appear on the Master Client Inquiry

## Check Out Process (post appointments)

### → Check Out Appointment (for individual session appointments only)

#### Prerequisites:

- Right-click on appointment and choose Details/Edit in order to make changes such as service code or duration
- Right-click on appointment and choose Additional Services—shows as + add svcs embedded into the appt

#### 1. Right-click appointment and choose *Check Out*

- If funds are collected, a receipt is generated and the transaction is recorded on the Client Ledger

#### 2. Once clicking Submit, the appointment appears as checked out on the calendar:

**Check out a Group:** use Post Staff Activity Log form so that changes to duration/service codes can be made accordingly; all individual appointments should be checked out from the Scheduling Calendar

## Actions after Check Out

### → Enter **Additional Services** after actual service is checked out (posted) from the Scheduling Calendar

(right-click on appt and choose Add Appointment—shows as an overbooked appointment for the actual service)

### → Check out **add on appointment** separately than original appointment (must check in the add on first, then check out)

### → Staff Unposted Appointment List

- Generate a report of all unposted appointments for individual (or all) practitioners at a site
- **Note:** All appointments on the scheduling calendar should be accounted for so that there are no lingering unposted appointments

* Staff Unposted Appointment List *												
Staff Member:												
Appointment Date	Start Time	End Time	Site	Client	Epd	Group	Service	Co Staff Member	Second Co Staff Member	Status		
12/02/2013	11:00 AM	11:30 AM			2		9080631APG A31			Schedule		
12/02/2013	04:00 PM	04:45 PM			2		INTAKESW Initi			Schedule		
12/03/2013	12:30 PM	01:00 PM			2		9080631APG A31			Schedule		
12/04/2013	11:00 AM	11:30 AM			2		9080631APG A31			Schedule		
12/04/2013	11:30 AM	12:00 PM			2		9080631APG A31			Schedule		

## Collect Funds / Generate Receipt without appointment present

### ➔ Deposit Entry (collect funds without appointment present on scheduling calendar)

- Service Code = Copay/Patient Responsibility (COPAYPTRES)
- Guarantor = Self Pay (whether a co-pay or self-pay client, choose (1) Self Pay)
- Posting Code = Payment Type:

Co-Pay - Cash	Patient Payment - Cash
Co-Pay - Charge	Patient Payment - Charge
Co-Pay - Check	Patient Payment - Check

(all payment/posting codes automatically generate a receipt)

### ➔ Re-Print Receipt

- Available if a receipt was initially generated:

Receipt Number
PSCH-000003- \$-10.00
PSCH-000006- \$15.88
PSCH-000007- \$29.12
PSCH-000008- \$40.00
PSCH-000009- \$20.00
PSCH-000010- \$5.00
PSCH-000011- \$10.00
PSCH-000012- \$10.00

Check **Tally Report**, if necessary, to verify receipt to reprint

### ➔ Outstanding Balance Popup / Client Willing to Pay?

- If the client has an outstanding balance, a pop-up will identify the outstanding self-pay balance whenever entering the Appointment Details. The person scheduling should ask if the client will pay when they arrive for the appointment.

- If YES is answered, it fills in Yes to “Client Willing To Pay At Front Desk” field in the Appointment Details.

- If NO is answered, the following is placed in the Appointment Notes: “Client has an outstanding balance and there is no confirmation on willingness to pay.”