Front Desk Manager

Overview

The Front Desk Manager, menu option **A-7**, manages the receiving desk of the social services agency. It provides for quickly identifying a client and displaying all relevant scheduling and billing information associated with that client for the given visit. These specific functions can be performed.

- Check-in the client for an already scheduled visit.
- Schedule a new appointment for an unscheduled visit.
- Show payments due for the current client visit.
- Show previous client balances and other billing information.
- Accept payment and print a receipt or admission slip.
- Electronically inform the clinician that the client has arrived.

Client Check-In

The Front Desk Manager is located in the Reception Menu at **A-7**.

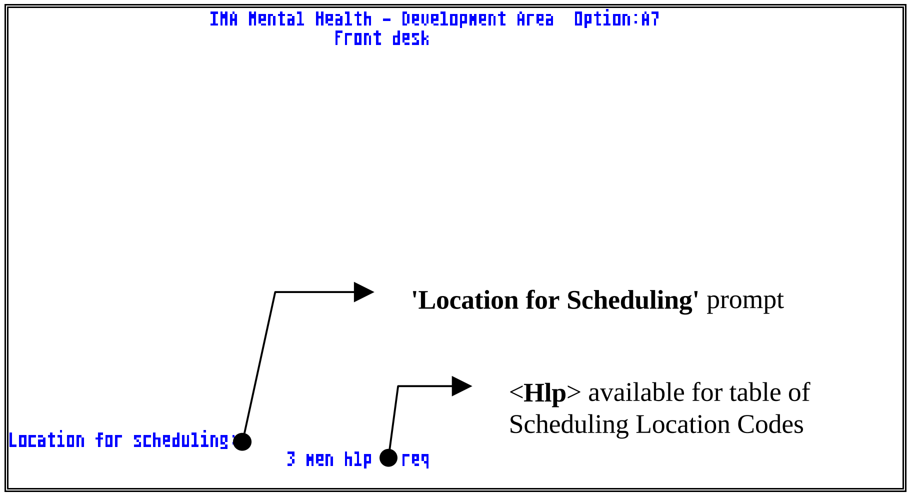
```
Version:11.0            The Mental Health Workbench            02/10/98 Tues
Copyright 1997 by    IMA Mental Health - Development Area         8:59 AM
    IMA, Inc.                    RECEPTION                     Option:A
Printer:Downstairs laser(WT)                               Georgeanne Biancarosa

               A1   - Client data
               A2   - Services/visits
               A3   - Receipt of payment/individual
               A4   - Scheduling
               A5   - Collaterals
               A6   - Pre-registration
               A7   - Front desk
               A8   - Client face sheets
               A9   - Client lookup
               A10  - Client labels
               A11  - Residential entitlements

Option:
                             9 men ext hlp
```

The A Sub-menu: Reception.

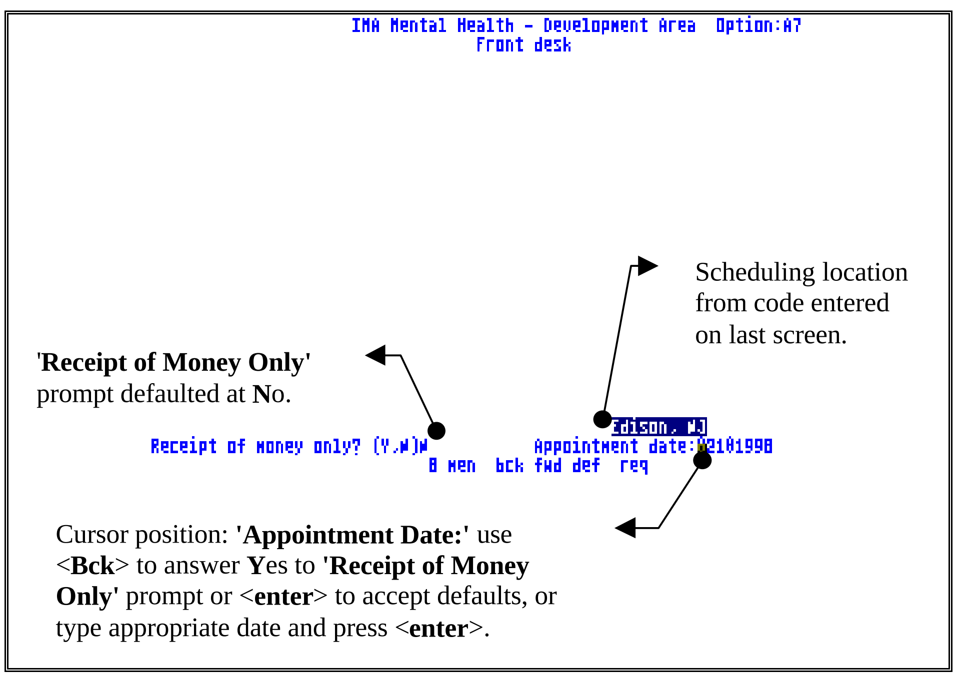
Upon entering the Front Desk Manager, agencies with multiple locations or sites will be prompted to enter a scheduling location code. It is useful to keep track of scheduling location for reporting and comparative purposes. The location code will appear on the staff schedule for the appointment as well. This field may be defaulted to the most commonly used code per agency during system set-up.



The initial screen in A-7: Front Desk Manager.

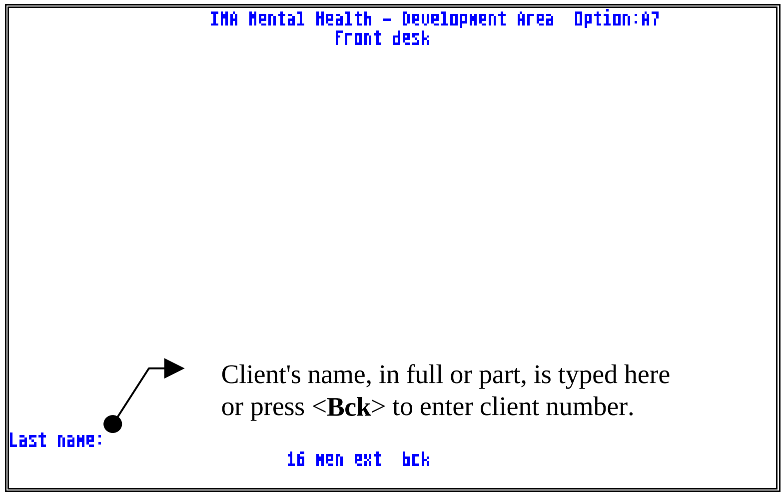
The next prompt asks **'Receipt of money only?'** and is defaulted to **N**o. The user can use the <**bck**> key to backup and answer **Y**es in the event that money only is to be received and none of the other front desk functions are needed. This would be applicable in the case of a client dropping in to pay off all or part of a balance owed.

Next is a prompt with the appointment date. The current date is defaulted here and should be accepted by pressing <**enter**>. This question is to provide for entering hand processed visits on a previous day in event of unavailability of the system. To do this, type the appropriate date at the **'Appointment Date:'** prompt and then press <**enter**>.



The next screen in the Front Desk Manager: A-7.

The system will then ask for the client name. The full or partial name can be entered and the help screen will automatically be brought up to locate the appropriate client number. If the client number is known, use the <**bck**> key to enter it.

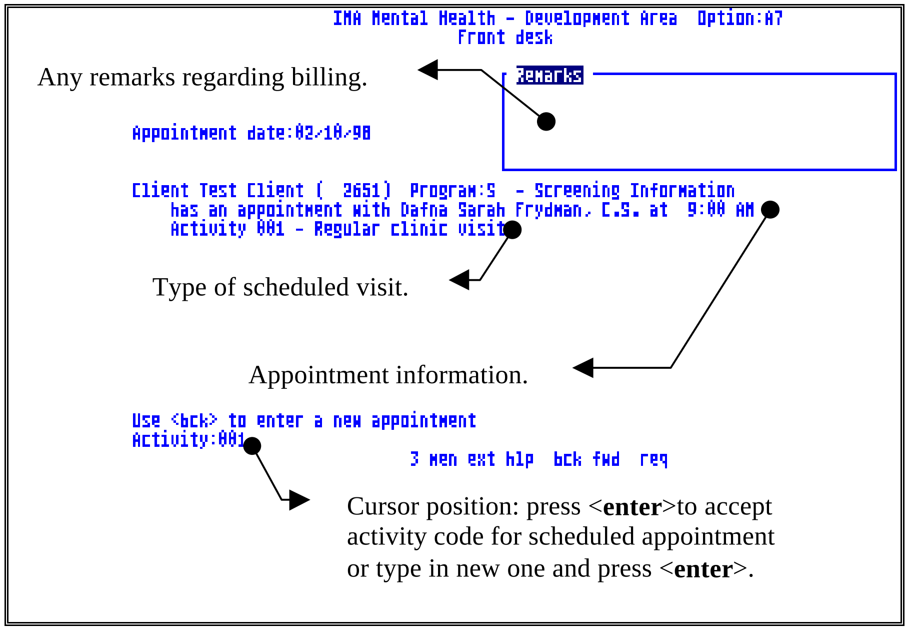


The following screen for client check-in at the Front Desk Manager in A-7.

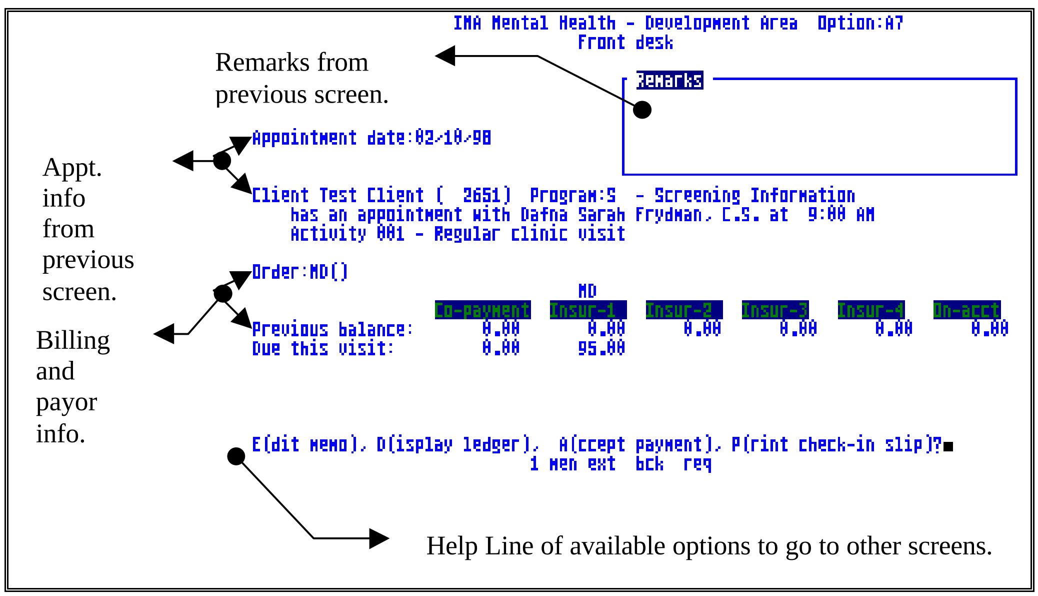
The system will then proceed to search for any scheduled appointments for the client on the given date.

- If an appointment is found, a check-in screen will appear with the appointment information.
- If a client has simultaneous appointments scheduled, one must be selected for processing this check-in. Use the up and down arrows or <**bck**> and <**fwd**> keys to highlight the correct appointment and press <**enter**> to choose it.
- If the client is scheduled as part of a group visit, the group name will be displayed. The client check-in is done within the group by signing the client roster. The staff calendar appointment status of **S** will not change unless the whole group visit is closed in **A2-SC,** which is covered in the Scheduling and Billing chapters of this Guide.

Once focused on a single appointment, the main check-in screen will be displayed. On the upper right corner there is a memo box that is also available in the client's billing header, the **A1-CB** screen. This is used to communicate special client handling instructions or warning information.



The following client information screen at the Front Desk Manager in A-7.

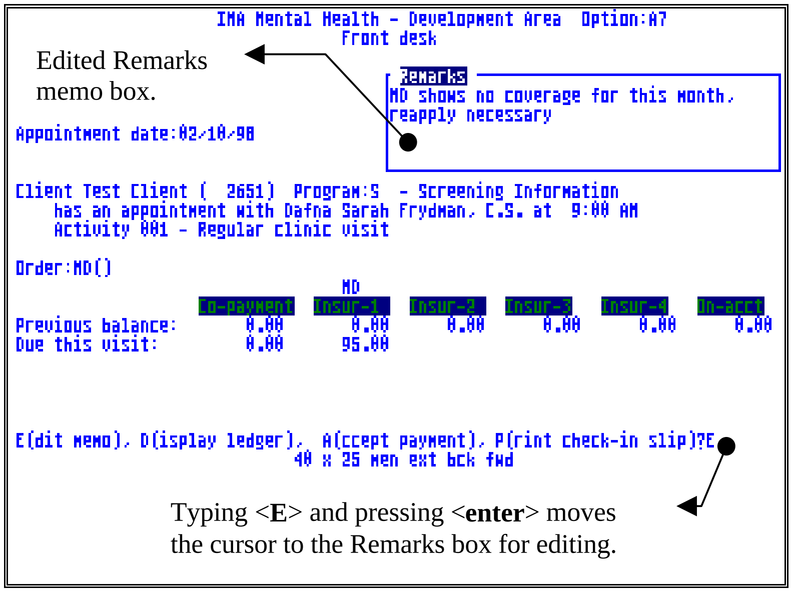


The second screen of client information regarding billing: Information for this particular visit is displayed as well as previous balance and payor information.

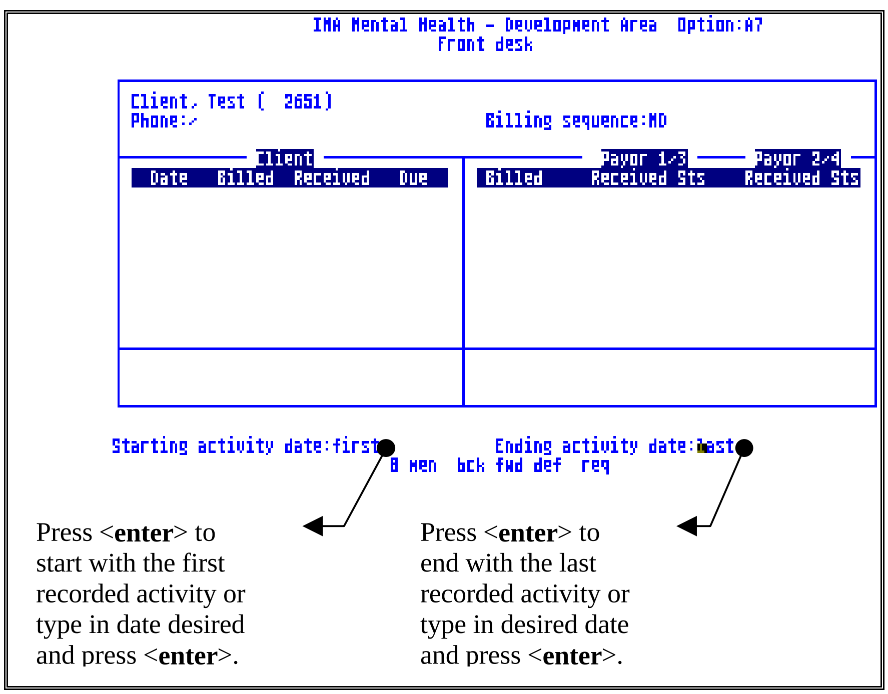
The client billing order is shown along with any balances due from the client or from third parties. The co-payment amount(s) due will show as "Due this visit" in the client column. Provision is made to collect this amount and any other amounts overdue. If the client insurance record indicates ineligibility or, if managed care, and the number or type of visits authorized have been exceeded or have expired, the system will warn the user with an error message and a beep. The visit can still be processed, though.

At this point there are three available options:

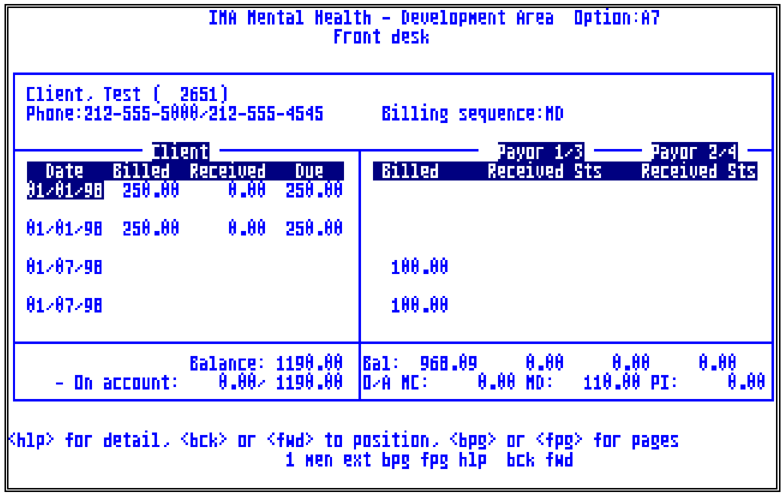
1. **D**isplay ledger will show the full detailed client ledger that produced the summary results. The <**hlp**> key can be used to view additional detail related to the ledger.
2. **A**ccept payment will allow the client to pay for any part of his balance. After the amount is entered, the system will print a check-in slip that also includes a cash receipt for the amount paid.
3. **P**rint check-in slip is used when no money is being received and the client is checked in as scheduled.



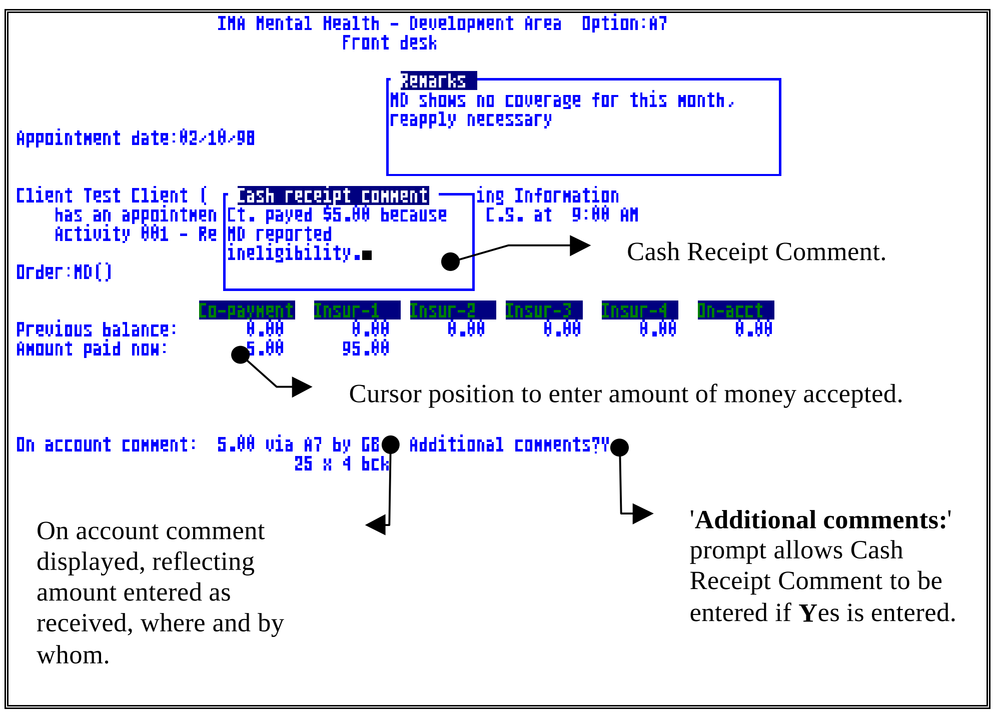
Selecting E allows Editing of Remarks memo box.



Selecting D shows a view of the client ledger: dates defining the activity dates selected must be entered or view all by accepting the first and last defaults.



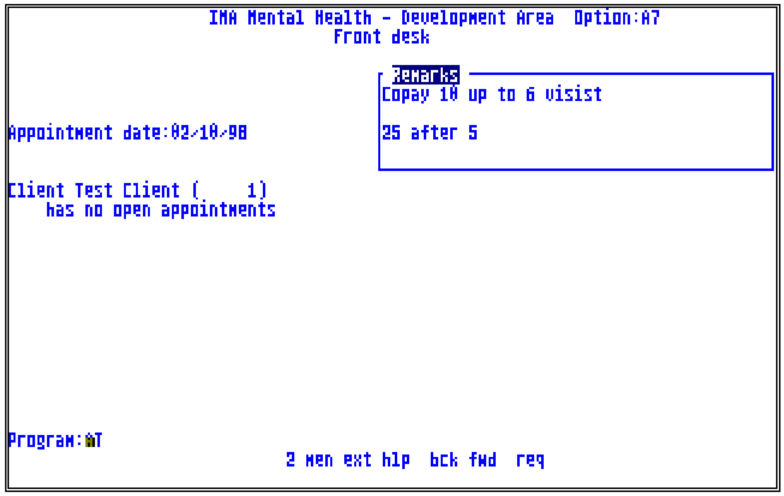
The Ledger showing client balance, payor balance and money on account from both client and payor.



*When **A**ccept Payment is chosen, cash amount is entered, an on-account comment is displayed and the opportunity to enter a Cash Receipt Comment in a memo box is offered. This causes a combined cash receipt/check-in slip to be printed.*

When no money is accepted. choose, **P**rint Check**-**in Slip to print slip for client visit.

- If the client does not have a scheduled appointment, one can be entered here. Information such as program enrollment, assigned counselor, time of appointment and activity code is required.



The client information screen in Front Desk Manager at A-7 when no appointment is scheduled.

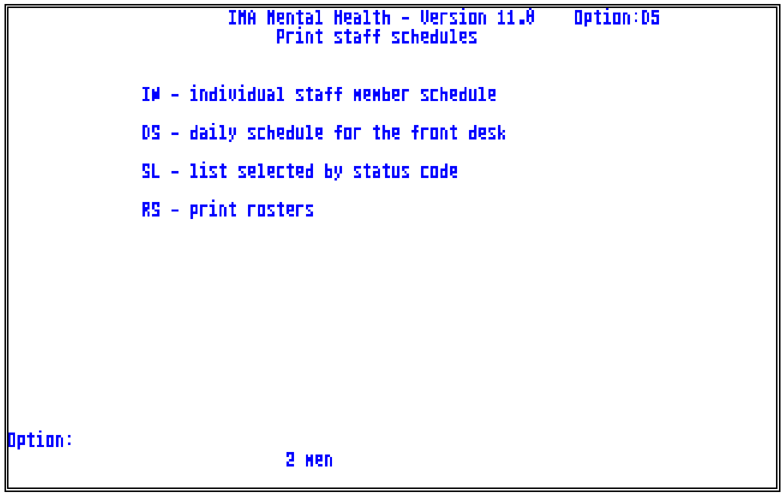
Upon completion of the check-in process, the system performs the following functions:

- The appointment status in the staff calendar is changed from **S** (scheduled) to **I** (checked in). There is also an option, determined by the agency, to bypass the **I** status and change the calendar entry directly to **C** (closed). This option will also generate a billing invoice. This is covered in the Billing Chapter.
- If any money was received, it is posted to the daily cash receipts journal and to the on-account client receipts section. A note is posted into the "On-account" description field of the client ledger relating to the amount received. For example, if an operator with the initials GB received $5.00 on 2/10/98, the comment will read: **5.00 via A7 by GB on 2/10/98**, as shown in the screen above.
- The system may or may not print a check-in slip depending on how this installation is configured in the **FRDESK.OPR** file. There are a few different slip formats available. The system administrator can advise regarding this.

Reports

Extensive reporting on the data in the scheduling system is available via the **D-5** option for Front Desk related activities. They are:

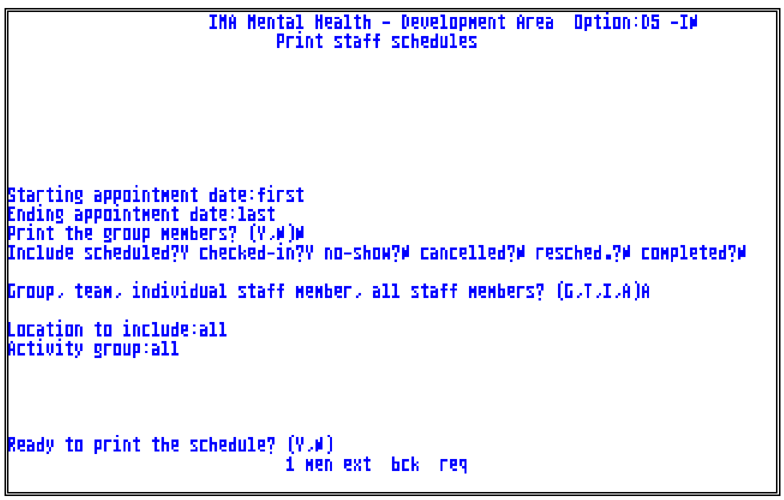
- **IN** – individual staff member schedule.
- **DS** – daily schedule for the front desk.
- **SL** – list selected by status code.
- **RS** – print rosters.



The D-5 menu screen: Print Staff Schedules.

Individual staff member schedule

This is used to prepare hard copies of the schedule for a specific staff person, staff group, or all staff for a given date range.



Individual Staff Member Schedule selection parameters screen.

Various selection criteria offer a vast array of options for printing schedules in Individual Staff Schedule.

- First, the starting and ending appointment dates must be entered. If a schedule is desired for one day, the date entered will be the same for both the starting and ending date fields.
- If the group members for the scheduled groups are not needed, accept the default by pressing <**enter**> at **N**o. If group members are desired, type <**Y**> and press <**enter**>.
- Next choose which status codes to select: Scheduled, Checked-in, No show, Cancelled, Rescheduled and/or Completed. Accept the defaults at each field by pressing <**enter>** or change by typing **Y** or **N** and then press <**enter**>.

- Select if **G**roup, **T**eam, **I**ndividual or **A**ll staff member schedules are preferable.
- Choose Location and Activity Group codes and press <**enter**>. <**Hlp**> is available on both of these fields.
- The system will then ask if **'Ready to Print the Schedule?'** Select **Y**es by pressing <**enter**> if so, if not, type <**N**> and <**enter**>. Then press <**bck**> to redefine the necessary fields until ready to print.

Daily schedule for Front desk

This is run to obtain a composite schedule on a specific date for a staff person, group of staff or location, to be used by the Front Desk for planning the day. It can also be used as a hard copy backup for checking-in clients as they arrive at the front desk.

```
                     IMA Mental Health - Development Area  Option:DS -DS
                            Print staff schedules




Appointment date:02101998

Print only open entries? (Y,N)N
Print only billable activities? (Y,N)N
Print only client related entries? (Y,N)Y
Print empty groups? (Y,N)N
Sort by time, client name, staff/client name, or staff/time? (T,N,S,M)T
Group, team, individual staff member, all staff members? (G,T,I,A)A

Location to include:all
Activity group:all




Ready to print the schedule? (Y,N)■
                             1 men ext  bck  req
```

Daily Schedule selection parameters for Front Desk.

Similarly, several selection criteria create a wide array of Front Desk Daily Schedule options.

- First enter the appointment date. The current date is the default for that field and can be accepted by pressing <**enter**>. If a different date is needed, type that date and press <**enter**>.
- Answer the following Yes or No questions. The most common answers are the defaults for each field. To accept the default answers, press <**enter**> at each field. To change the default, type the corresponding code **Y** or **N** at the field and press <**enter**>.
- Determine sort preference: **T**ime, Client **N**ame, **S**taff/Client Name or Staff/Ti**M**e and press <**enter**>.
- Determine if **G**roup, **T**eam, **I**ndividual Staff or **A**ll staff schedules are desired and press <**enter**>.
- Choose Location and Activity Group codes and press <**enter**>. <**Hlp**> is available on both of these fields.
- The system will then ask if **'Ready to Print the Schedule?'** Select **Y**es by pressing <**enter**>, if not, type <**N**> and press <**enter**>.

Then press <**bck**> to redefine the necessary fields until ready to print.

Selection by Status Code

This is a reporting tool for tracking specific statuses of appointments such as **N**o shows, **U**ser cancellations, **R**eschedules and **C**ompletions. The number of visits is recorded by Staff, Program, Staff group, or Team.

```
                     IMA Mental Health - Development Area  Option:DS -SL
                            Print staff schedules






Starting appointment date:first
Ending appointment date:last

Include scheduled?Y checked-in?Y no-show?N cancelled?N resched.?N completed?N
Group, team, individual staff member, all staff members? (G,T,I,A)A


Location to include:all
Activity group:all




Ready to print the schedule? (Y,N)
                             i men ext  bck  req
```

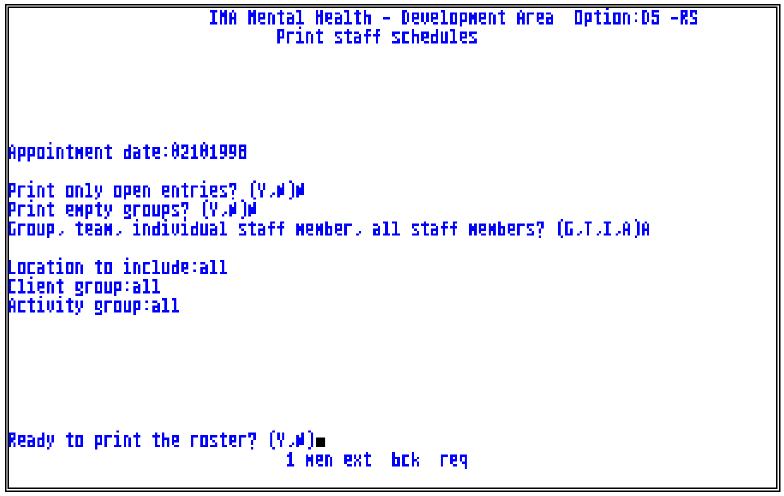
Status code list selection parameters for Individual Staff Member.

Various selection criteria create many options by Status Codes as well:

- First, the starting and ending appointment dates must be entered. If a view for one day is desired, the date entered will be the same for both the starting and ending date fields.
- Next choose which status codes to select: **S**cheduled, checked-**I**n, **N**o show, **U**ser cancelled, **R**escheduled and/or **C**ompleted. Accept the defaults at each field by pressing <**enter>** or change by typing **Y** or **N** and then press <**enter**>.
- Select if **G**roup, **T**eam, **I**ndividual or **A**ll staff member schedules are preferable.
- Choose Location and Activity Group codes and press <**enter**>. <**Hlp**> is available on both of these fields.
- The system will then ask if **'Ready to Print the Schedule?'** Select **Y**es by pressing <**enter**>, if not, type <**N**> and <**enter**>. Then press <**bck**> to redefine the necessary fields until ready to print.

Print Rosters

This is specific to group appointments. It lists all members of the scheduled group visit with a space for the staff person to mark the client present or absent or for the client to sign in. The staff person can also sign and date the bottom of the roster.



Print rosters selection parameters screen.

Similarly, various options are available for this report:

- First enter the appointment date. The current date is the default for this field and can be accepted by pressing <**enter**>. If a different date is needed, type that date and press <**enter**>.
- Answer the following Yes or No questions. The most common answers are the defaults for each field. To accept the default answers, press <**enter**> at each field. To change the default, type the corresponding code **Y** or **N** at the field and press <**enter**>.
- Select if **G**roup, **T**eam, **I**ndividual or **A**ll staff member schedules are to be included.
- Choose Location, Client Group and Activity Group codes and press <**enter**>. <**Hlp**> is available on each of these fields.
- The system will then ask if **'Ready to Print the Schedule?'** Select **Y**es by pressing <**enter**>, if not, type <**N**> and <**enter**>. Then press <**bck**> to redefine the necessary fields until ready to print.