

The IMA Desktop Implementation Guide

Front Desk Check-in

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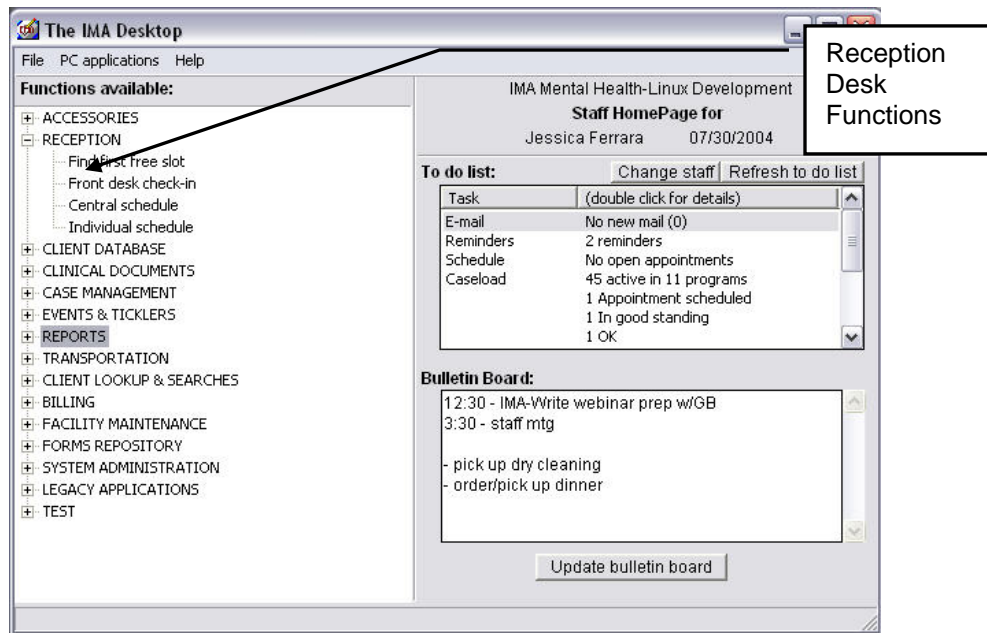
Introduction

Each individual staff calendar comes together into a master schedule at the front desk. Staff can manage appointments for a number of clinicians and handle numerous phone calls regarding scheduling, cancellations, and re-scheduling. Current information regarding open times and available appointment slots is available. The front desk may receive walk-in visits, be responsible for client check-in, payment of outstanding balances, receipt printing, and correction of client billing information.

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The Reception Menu



Reception Desk functions:

Find first free slot performs a search for open appointment times, receive calls and suggest possible times and dates for specific appointment requests.

Front desk check-in displays the scheduled appointments for the day and gives staff the ability to check in clients, receive payment, swipe ID cards and perform other management tasks.

Central schedule is a global view of the entire calendar that shows all appointments and open times for a selected time period. Staff can zoom in on individual schedules to work on them.

Individual schedule as discussed previously in this Implementation Guide, all scheduling is done on individual calendars, the front desk chooses which one to work on, selects a specific staff member, group, or client, and then open the calendar to add new appointments, reschedule, modify, delete, or print.

Learn about these functions:

Three of the Reception menus, the **Individual Schedule**, **Central Schedule**, and **Find First Free Slot** relate to Calendars and are discussed in detail in the Schedule and Calendar section of the Implementation Guide.

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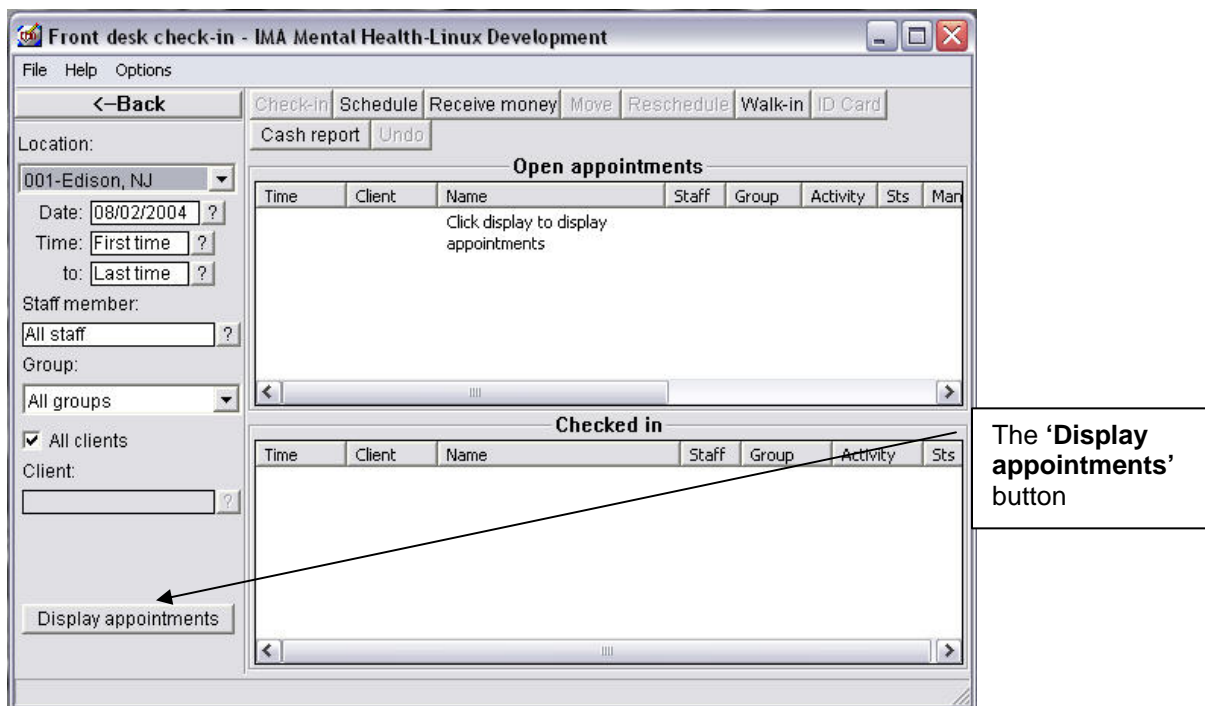
Front Desk Check-in

Client Check-in

In the Front Desk Check-in window, a receptionist can check in clients when they arrive, manage payments, handle phone appointments, and update the schedule.

| [-] RECEPTION

| -> Front desk check-in



When the Front desk check-in window first opens, the 'Open appointments' and 'Checked in' areas are empty.

- Confirm the location and date, and filter the view if needed
- Click 'Display appointments' to fill in the screen.

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Highlight an appointment to work on and activate the **Control Buttons**. Three **Control Buttons** are always active:

Schedule – goes directly to the Calendar, for use if a client wants to make an appointment

Receive Money – from a client not on the current schedule making a payment

Walk-in – process visits by clients without previously scheduled appointments

To refine the view of the appointments:

The default setting is of the day's appointments at a specified location. Apply a filter to alter the view.

Change any of these parameters before clicking '**Display appointments**':

Location primary or satellite office locale

Date (one day may be displayed at a time)

Time range

Specific staff member or group specifies another level for look up

Specific client ('All clients' must be unchecked)

After clicking '**Display appointments**':

The Open appointments list displays what is currently open for that location and day (and that meets the filter criteria that has been chosen). The window has columns that scroll to the right with information for each appointment:

Time – starting time of the appointment

Client – ID number

Name – client's name

Staff – staff member's code

Group – if applicable

Activity – activity code

Sts – status code (**S**=scheduled, **I**=checked in **C**=completed*)

Managed care – notation about authorizations

*Note on 'Completed' status: when the IMA desktop is used for clinical management, the checked-in appointment remains active (code "I") until a progress note is written. Then, the appointment is considered completed (code "C"). Once completed, the appointment data cannot be changed or undone, even by a supervisor.

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Control buttons: apply to the selected appointment

Open Appointments for this location, date and time. Click one to select it.

Checked In: clients have arrived

Open appointments for 08/02/2004 at location 001

Time	Client	Name	Staff	Group	Activity	Sts
9:00 AM		Literature Group	JF	P&P	002	S
9:00 AM	9056	Parker, Mary Jane	JF	P&P	002	S
10:45 AM	103	Jackubovich, Jeannie	JF		001	S
11:30 AM	9035	Gaiman, Neil	DGB		001	S
1:00 PM	9055	Simpson, Lisa	JF		001	S
2:00 PM		Lunch group	JF	LNCH	002	S

Checked in

Time	Client	Name	Staff	Group	Activity	Sts
9:00 AM	8883	Asner, Edward	JF	P&P	002	S
9:00 AM	8950	Tiger, Lisa-Marie	DGB		001	I
9:00 AM	9015	Bennett, Elizabeth	JF	P&P	002	S
9:00 AM	9016	Bingley, Caroline	JF	P&P	002	S
9:00 AM	9017	Darcy, Fitzwilliam	JF	P&P	002	S
9:00 AM	9018	Lucas, Charlotte	JF	P&P	002	S
9:00 AM	9026	Novello, Antonia	JF	P&P	002	S

To check in a scheduled appointment, double-click the appointment.

The 'Client check in' screen:

Client check-in

Calendar
 Client: 8950 Tiger, Lisa-Marie
 Group: [dropdown]
 Staff: DGB - Biancarosa, MSW, D. Ger
 Time: 9:00 AM
 Activity: 001 - Regular Clinical Visit - 1 Hr

Programs:

Program	Staff	Intake	Termination
OA/ 1	GB	09/11/2003	
OO/ 1	JF	12/11/2001	

Billing

	Due this visit	Previous Balance
Co-payment:	0.00	65.00
On-account:		0.00

Billing order: MD:XC31308D

Memo:
 Today's activity:

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There are two major sections of the screen: Calendar (to fill in) and Billing (for viewing only).

Many of the Calendar fields on the Check-in form are pre-filled with the information from the scheduled appointment. The client's default program will be highlighted. If all of the information is correct, press '**Check in**' or '**Accept payment**' to proceed with the transaction.

In the Calendar area of the Client check-in form some fields may be blank (the Check-in form for a walk-in will not have any fields filled). There are fields for the following:

Client

Group (if applicable)

Staff

Time

Activity

Program (select one of the client's active programs)

In the Billing area of the check-in form, there are fields that show the client's current balance and any amount due for this visit. The Billing order (from the client's Billing Header) is shown as well.

The Billing area of the form has two spaces for special information: Memo and Today's activity.

Memo displays the Billing Notes (if any) that have been entered by the agency's accounting staff in the client's Billing Header on the Billing order/Notes tab. They can use the notes to communicate with the front desk about the client, and they can share important alerts (For example, 'get new insurance card information'; 'check new address', 'managed care authorization expired', etc.)

Today's activity area holds text associated with the appointment, such as schedule information, a room change, or directions a client might need. This text comes from the Memo field of the New appointment screen.

To accept payment:

Click the '**Accept payment**' control button. If the client is not making payment at this time, click '**Check in**'.

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The '*Receipt of payment*' screen:

The screenshot shows a window titled "Receipt of payment". At the top left are two buttons: "<-Back" and "Update". Below these are several input fields. The "Amount" field contains "15.00". The "Bank" field is a dropdown menu currently showing "BN00 - Bank 00". The "On account comment" field contains "15.00 via A7 by JF". To the right of these fields is a larger text area labeled "Cash receipt memo:" which contains the text "cash received for services rendered/pending."

The IMA Desktop controls cash receipts carefully so that accounting staff can reconcile the amounts entered by each clerk with actual checks and cash. Details of all payments entered by each staff member are tracked and can be summarized using a Reports facility described later in this section. For accuracy and security, it is important for each front desk staff person to log in when they start and log out at the shift's end.

The fields on the *Receipt of payment* form are:

Amount

Bank – defaults to settings in operator's control file

On account comment

Cash receipt memo – enter check number, 'cash', or other comments

After the amount received has been entered, click **Update**.

A receipt will print and complete Check-in, to return to the Front Desk Check-in screen. The appointment processed will appear in the '*Checked in*' section of the screen.

If there is a mistake:

To prevent fraud and abuse, client check-in and cash receipts are 'written in permanent ink'. There is an '**Undo**' feature that can only be used by an individual with supervisor privileges. The front desk staff person must, therefore, report any errors to their supervisor for correction. This feature is explained in the Administrative chapter of the front desk check-in guide.

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Check-in for Groups

When a group meeting is scheduled, the meeting appears in the 'Open appointments' screen at its scheduled date and time. A list of Individual appointments for each member of the group also appears. Click on these individual appointments to check clients in as they arrive. Receive money, issue receipts, and register walk-ins. The check-in procedure for these clients is the same as for individual check-in.

The screenshot shows the 'Front desk check-in' application window. The title bar reads 'Front desk check-in - IMA Mental Health-Linux Development'. The menu bar includes 'File', 'Help', and 'Options'. The main interface has a toolbar with buttons: '<-Back', 'Check-in', 'Schedule', 'Receive money', 'Move', 'Reschedule', 'Walk-in', 'ID Card', 'Cash report', and 'Undo'. On the left, there are input fields for 'Location' (001-Edison, NJ), 'Date' (08/02/2004), 'Time' (First time), 'Staff member' (All staff), and 'Group' (All groups). The main area is divided into two tables.

Open appointments for 08/02/2004 at location 001

Time	Client	Name	Staff	Group	Activity	Sts	Mar
9:00 AM		Literature Group	JF	P&P	002	5	
9:00 AM	8950	Tiger, Lisa-Marie	DGB		001	5	
10:45 AM	103	Jackubovich, Jeannie	JF		001	5	Visit
11:30 AM	9035	Gaiman, Neil	DGB		001	5	
1:00 PM	9055	Simpson, Lisa	JF		001	5	
2:00 PM		Lunch group	JF	LNCH	002	5	

Checked in

Time	Client	Name	Staff	Group	Activity	Sts	Mar
9:00 AM	8883	Asner, Edward	JF	P&P	002	5	
9:00 AM	9015	Bennett, Elizabeth	JF	P&P	002	5	
9:00 AM	9016	Bingley, Caroline	JF	P&P	002	5	
9:00 AM	9017	Darcy, Fitzwilliam	JF	P&P	002	5	
9:00 AM	9018	Lucas, Charlotte	JF	P&P	002	5	
9:00 AM	9026	Novello, Antonia	JF	P&P	002	5	
9:00 AM	9056	Parker, Mary Jane	JF	P&P	002	5	

Callouts in the image:

- 'Scheduled group meeting' points to the 'Literature Group' row in the 'Open appointments' table.
- 'Client appointments for group' points to the individual client rows (Tiger, Lisa-Marie, Jackubovich, Jeannie, Gaiman, Neil, Simpson, Lisa) in the 'Open appointments' table.
- 'Client is now checked in for the 'Literature group' meeting.' points to the 'Asner, Edward' row in the 'Checked in' table.

Client names and security

If Divisional Security has been implemented (for details, please refer to the Access and Security section of the Implementation Guide), client names may be kept private. If the client is in the same division as the front desk operator, or if the front desk operator has rights to view clients from that division the actual client name will appear on his or her list. Otherwise, " * * CLIENT * *" will appear.

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Walk-ins

To manage an arrival without a scheduled appointment, press the **‘Walk-in’** control button.

This button is always active on the check-in screen. It opens the *‘Walk in selection’* screen where either a scheduled group or an individual appointment can be selected for the client to attend:



If **‘Scheduled group’** is clicked, the *‘Group appointments’* window will activate. A list of groups that are scheduled for the current day will pop up for selection and will pre-fill the *‘New appointment’* screen with the group name, date and time. Fill in the remaining information including the client’s name.

If **‘New appointment’** is clicked, the appointment screen will fill in with the client’s name and details about the appointment, the activity code, and who the client is meeting with. On the **‘staff’** field, a staff member’s calendar can be accessed to determine his or her availability.

The sequence is the same for a walk-in in groups and individual appointments:

- Pick a group; or click **‘New appointment’**
- Create a new appointment, fill in the screen and identify the client
- Receive payment and print a receipt if applicable
- Complete the *‘Check in’* procedure

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Reports

Scheduled appointments

A printed list of the day's scheduled appointments can be obtained:

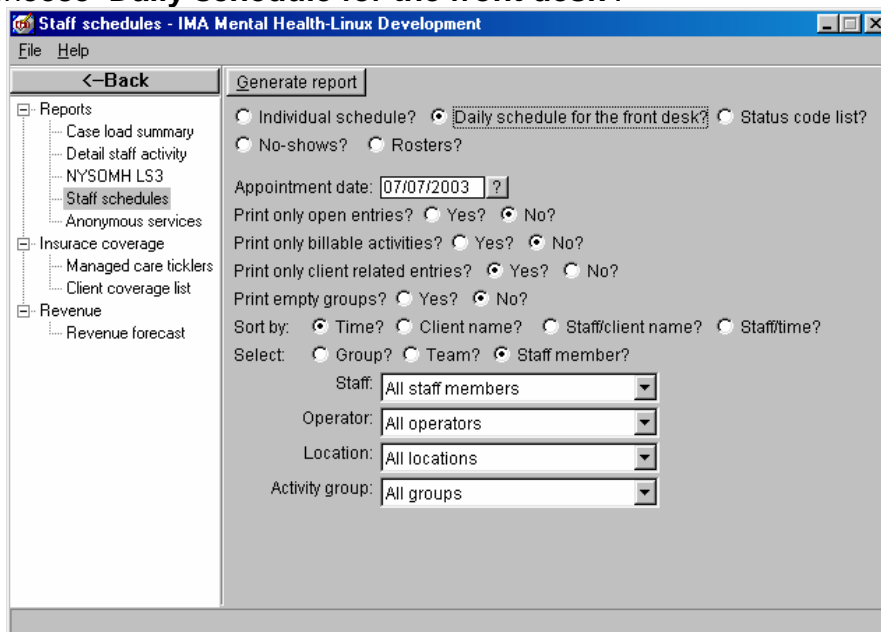
| [-] REPORTS

| -> End user reports...

| [-] Reports

| -> Staff schedules

Click to choose '**Daily schedule for the front desk**':



The selection criteria can be fine-tuned to produce a report that includes, excludes, and filters the appointments. The default includes, today's appointments for all clients, sorted by time, for all staff, all operators, and all locations. Click '**Generate report**'.

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Cash Receipts Report

At the end of a work day or shift, the actual total of cash and checks received should agree with the totals entered into the system. The information will be on the Cash Receipts Report for this operator. To produce this report:

| [-] REPORTS

| [-] Legacy reports

| [-] Financial reports

| -> C15 – Daily client cash report

| -> CR – Report of cash receipts

Enter information or accept defaults (press **Enter** on each line) for:

Date range: select

Bank: all

Program unit or organization type: 0

Organization type: all

Source: CL (for client)

Operator: (enter the operator code for the receptionist)

Press **Enter** to complete the form and send to printer or display

Function key **F4** exits.

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Administering the check-in function

Admin control file

When a receptionist signs in, the IMA Desktop recalls his or her individual settings: normal location, default printer, the form used for receipts, the default bank for deposits, and several other items. These settings are stored in a special system file called FRDESK.OPR.

To edit the file:

```
| [-] SYSTEM ADMINISTRATION
|     [-] Definitions
|         [-] #12 – Edit Control Files
|             -> Miscellaneous
|                 -> enter the file name FRDESK.OPR
```

This text file contains lines for:

- # Operator
- # Locations
- # Operators permitted
- # Printer ID and type
- # Receipt form name
- # Bank ID

for the exact syntax of the lines in this file, consult with the IMA technical support representative.

Activating the 'Undo' feature

The front desk check-in 'Undo' button appears if the logged-in user has supervisory rights (their security profile has '?????' – the 5 question mark wild card, or '+super'). A person with these privileges can highlight a checked-in appointment, click 'Undo', reverse the check-in, and reverse the cash receipt. Since these functions affect basic accounting for cash receipts, they should only be used in rare cases by staff who are familiar with the consequences.

Pop-up Notification

When a client checks in, the IMA Desktop can send a pop-up notification to the screen of the clinician who has the appointment, if they are logged in. Click 'OK' to acknowledge that the client has arrived. To activate this feature, change the 'notify' line in the FRDESK.OPR file as described above.