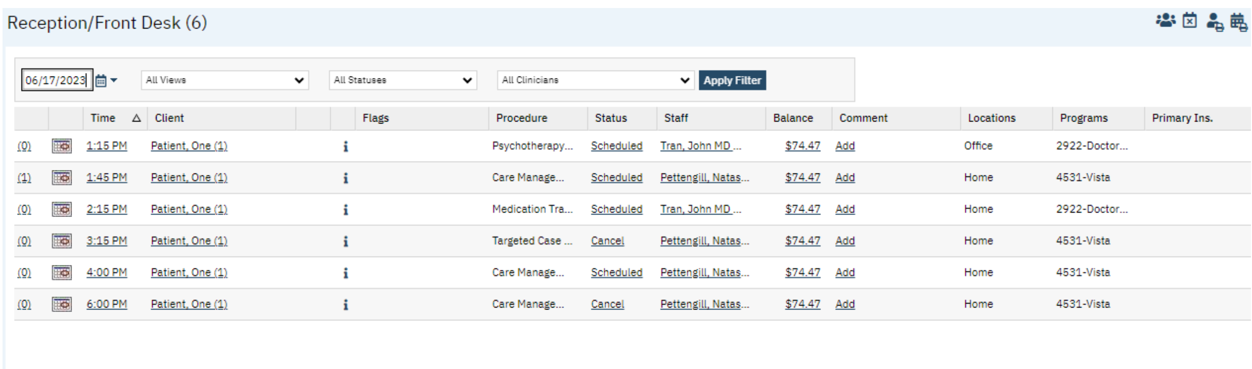
Checking a Person in for an Appointment in SmartCare

This will be utilized by office staff in the check in/reception areas for clients that walk in.

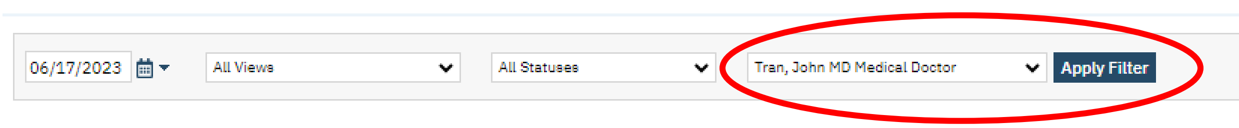
1. Before starting, if the client knows which provider or staff member they are here to see, continue to step 2.
    a. If the client <u>does not</u> remember the name of the provider or staff member they are here to see, utilize the client search options to bring up their profile before continuing. 
2. Click on the Search Icon 

3. Type in Reception – Select "Reception/Front Desk (My Office) from the drop down. This will open the Reception/Front Desk Window.

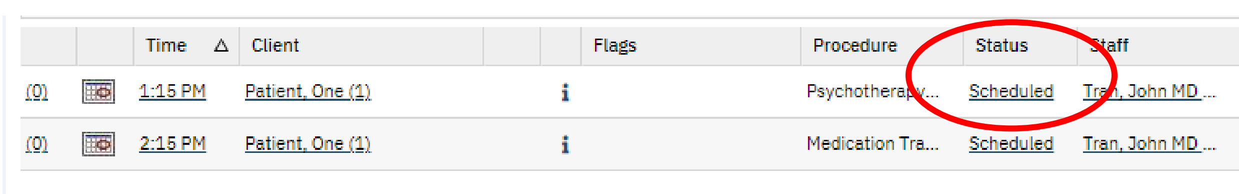


		Time	Client		Flags	Procedure	Status	Staff	Balance	Comment	Locations	Programs	Primary Ins.
(0)		1:15 PM	Patient, One (1)	i		Psychotherapy...	Scheduled	Tran, John MD ...	$74.47	Add	Office	2922-Doctor...	
(1)		1:45 PM	Patient, One (1)	i		Care Manage...	Scheduled	Pettengill, Natas...	$74.47	Add	Home	4531-Vista	
(0)		2:15 PM	Patient, One (1)	i		Medication Tra...	Scheduled	Tran, John MD ...	$74.47	Add	Home	2922-Doctor...	
(0)		3:15 PM	Patient, One (1)	i		Targeted Case ...	Cancel	Pettengill, Natas...	$74.47	Add	Home	4531-Vista	
(0)		4:00 PM	Patient, One (1)	i		Care Manage...	Scheduled	Pettengill, Natas...	$74.47	Add	Home	4531-Vista	
(0)		6:00 PM	Patient, One (1)	i		Care Manage...	Cancel	Pettengill, Natas...	$74.47	Add	Home	4531-Vista	

4. Use the drop down for clinicians to select the providers name and click on the "Apply Filter" button.



5. Once you have located the correct date, time, provider, and client, you will need to change the status. In the Status column, click on the "Scheduled"



		Time	Client		Flags	Procedure	Status	Staff
(0)		1:15 PM	Patient, One (1)	i		Psychotherapy...	Scheduled	Tran, John MD ...
(0)		2:15 PM	Patient, One (1)	i		Medication Tra...	Scheduled	Tran, John MD ...

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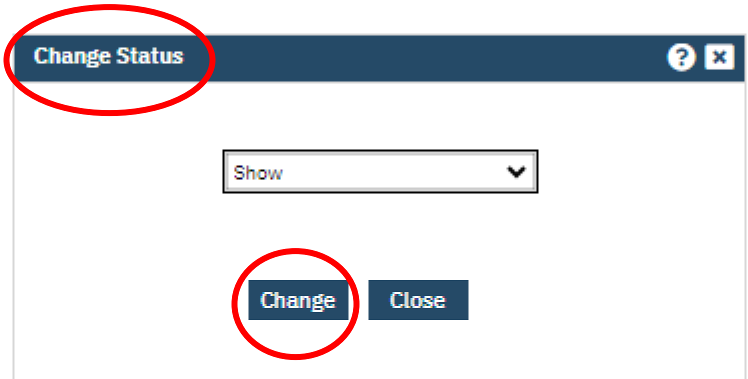
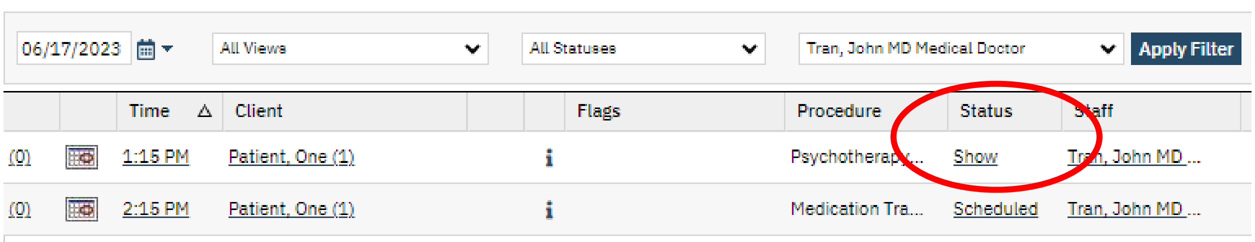
6. The "Change Status" window will pop up. Select "show" from the drop-down screen. Click the "Change" button to close the screen.



7. This will show the appointment status as "Show", meaning they have checked in.
   a. **NOTE**: if you change the status to "show" and a different staff/provider sees the PS instead of the original intended provider (example: cross coverage or triage) this will create a duplicate note.



8. Send a check in email to the appropriate provider and nursing staff.
   a. Utilize the method your department uses to notify staff if it is different from above.

ADDITIONAL INFORMATION: you can use this procedure to look up a client who is canceling their <u>same day appointment</u>. For the status you would select cancel. This will ask you to select a cancel reason from and additional drop-down menu. Select the appropriate reason and notify staff. Leave a comment or contact note.

For cancelation or rescheduling of <u>future appointments</u> see appropriate how to guide for rescheduling.