ClinicOffice

Patient Check-In Guide

Introduction

The Patient Check-In application is a web-based tool that lets patients check in when they arrive at the clinic. Once checked in, the patient's appointment will show that they have arrived. This saves time for your reception staff.

The patient only needs to enter the first letter of their surname and their month and day of birth. The system will then match them up to their appointment and mark the patient as having arrived.

Prerequisites

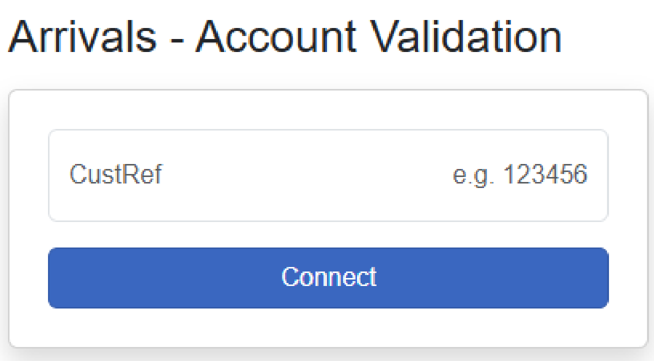
The Patient Arrivals feature is offered as a standard feature for anyone who has the ClinicOffice Hosted edition or for local ClinicOffice v6 customers who are subscribed to the Online Services. When using Patient Check-In, it will use a single Web edition license per active login on a device.

This application can be displayed on any device that has a web browser, but generally we would recommend a touch screen device such as a tablet or a machine with a touch screen-based monitor.

How to Setup

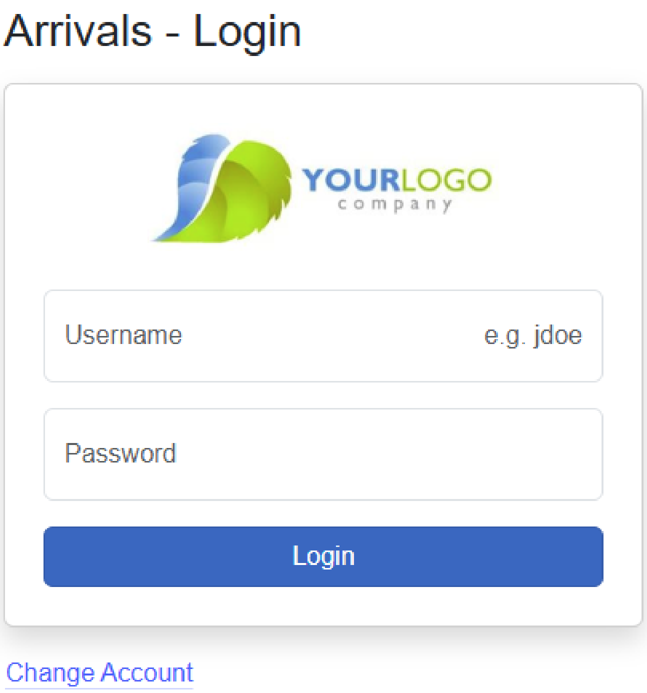
Setting up the Patient Check-In is just a **two-step** process.

1) The first step is to visit https://checkin.clinicoffice.online, enter your customer reference and click **Connect**

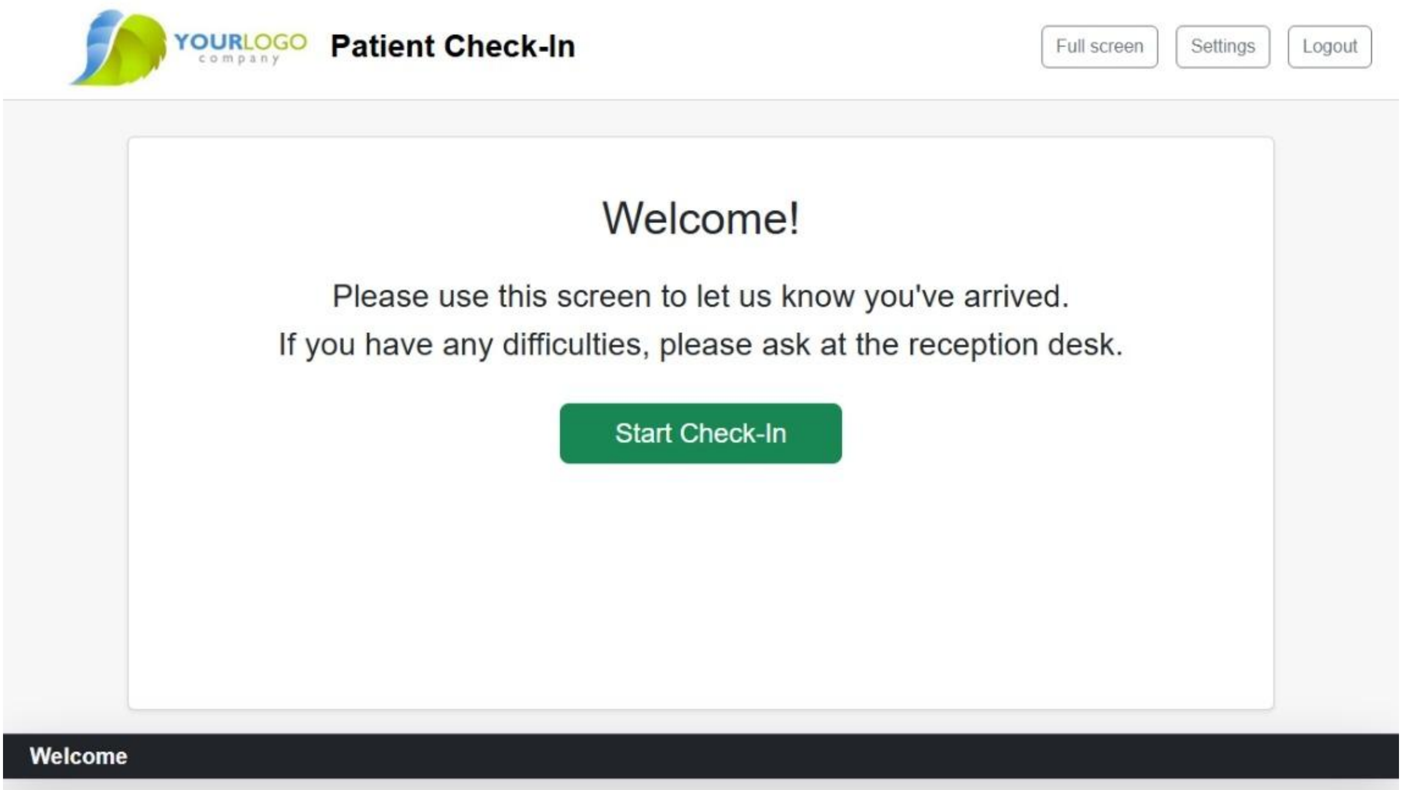


If you are not too sure what you customer reference is, you can find it by logging into the Client Portal > **Account Details** and you can find the six-digit customer reference from here.

2) On the next screen, enter your ClinicOffice Username and Password and click **Login**



Once logged in you will see a similar screen to the one below and the device is now ready for the patient to self-check-in with.

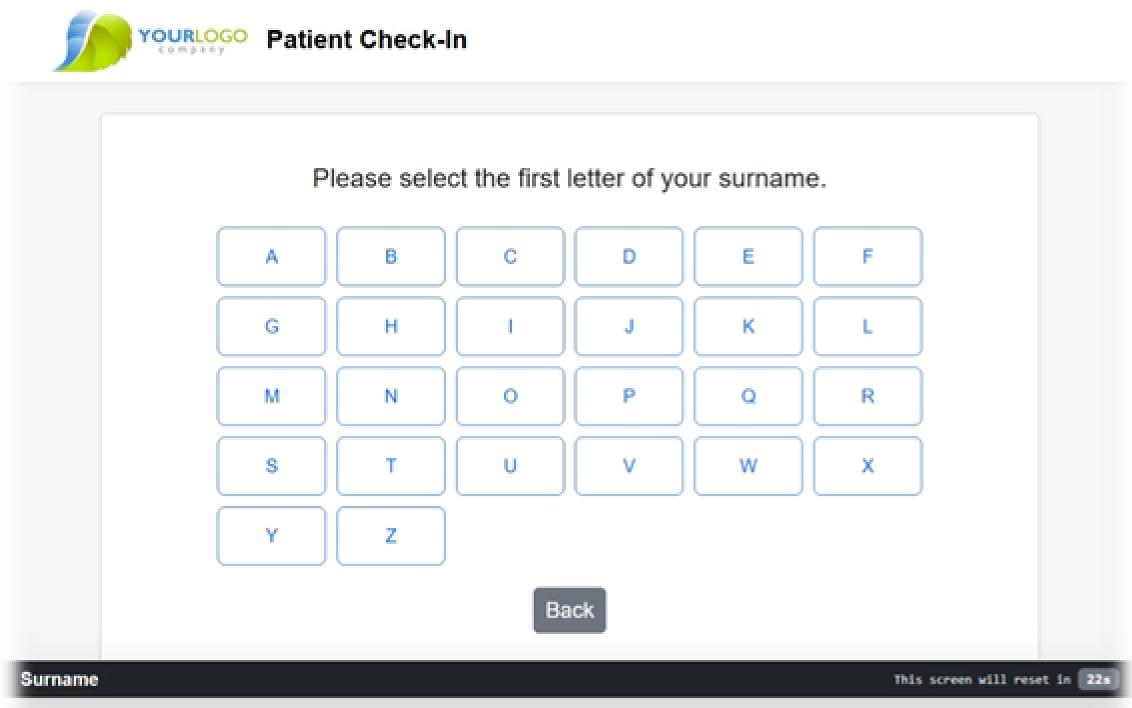


Generally, we would recommend that you click the **Full Screen** button so that the patient can only see this Check-In screen. We also recommend that you hide buttons such as **Settings** and **Logout;** you can do this under the settings.

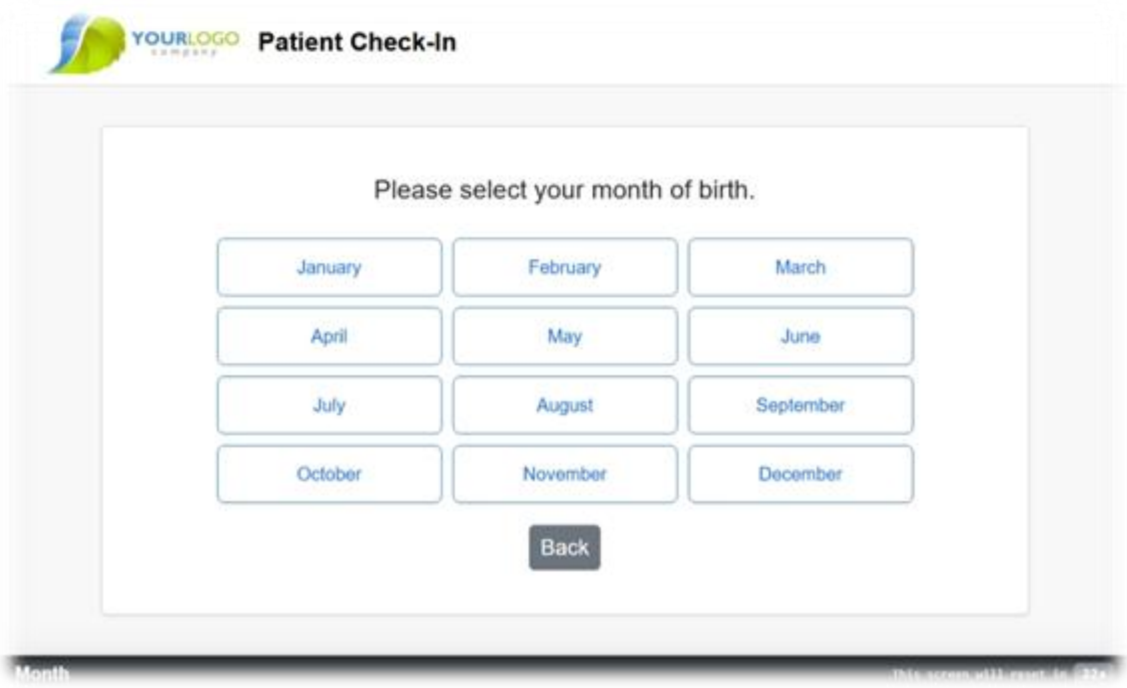
How the Patient Uses the Check-In

The steps for the to self-check-in is very straightforward as demonstrated below.

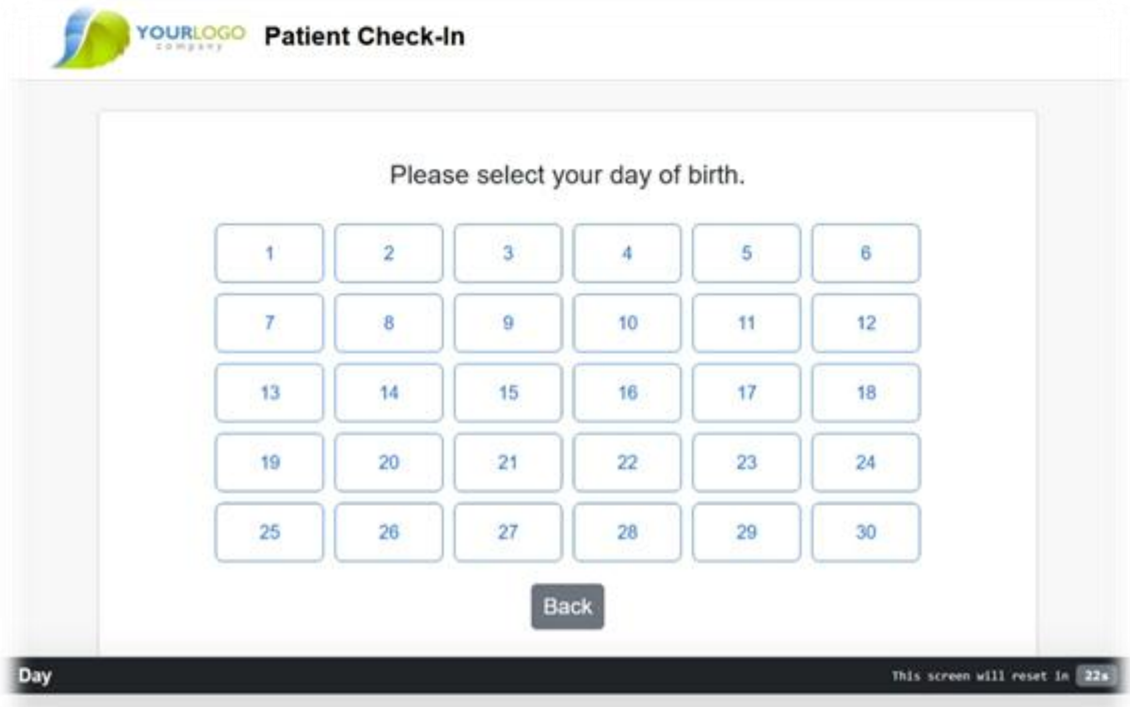
1) They click the **Start Check-In** button
2) They would then select the first letter of their surname



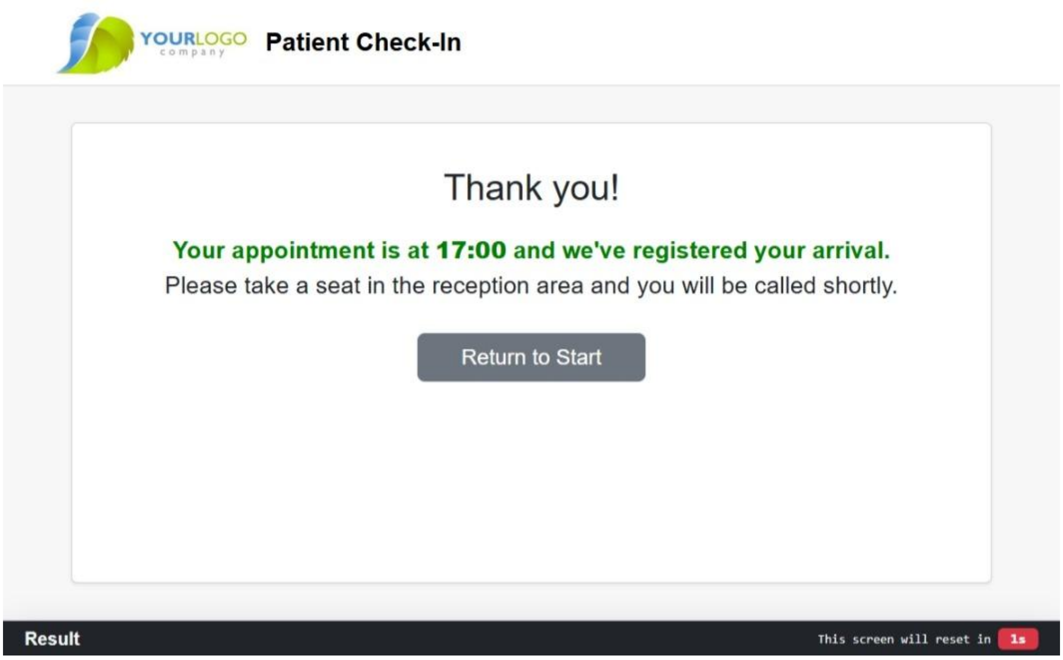
3) Select the month of birth



4) Select their day of birth



When the system detects a match, the patient will a message like the one below.

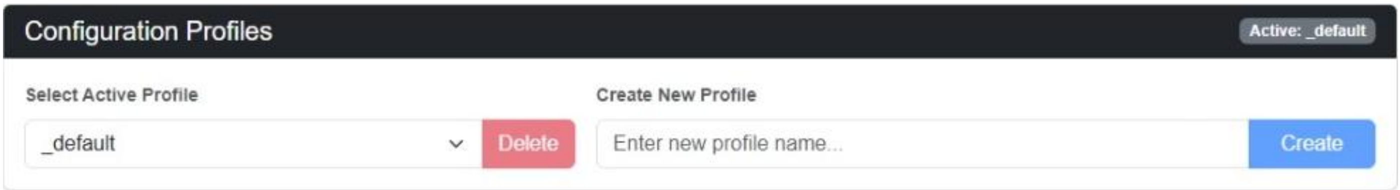


The screen will automatically return to the beginning after a few seconds, ready for the next patient's arrival.

Settings

To access the settings, click the **Settings** button towards the top right of the screen. If this is not visible, you will need to double-click/tap on your company logo, and it will then appear. For security reasons, you will be asked for your password again.

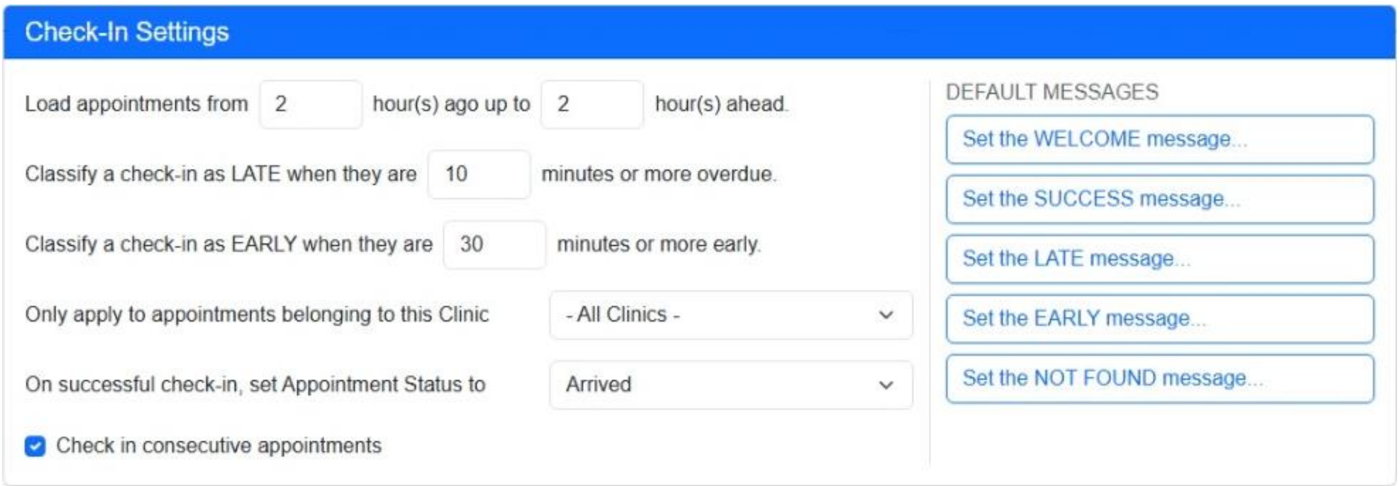
Below is a breakdown of the settings on this page.



This allows you to select different profiles. A profile is a way of saving specific settings for different purposes. For example, if you have more than one clinic and you have different messages or requirements for each of the clinics. Different locations could thus use different profiles.

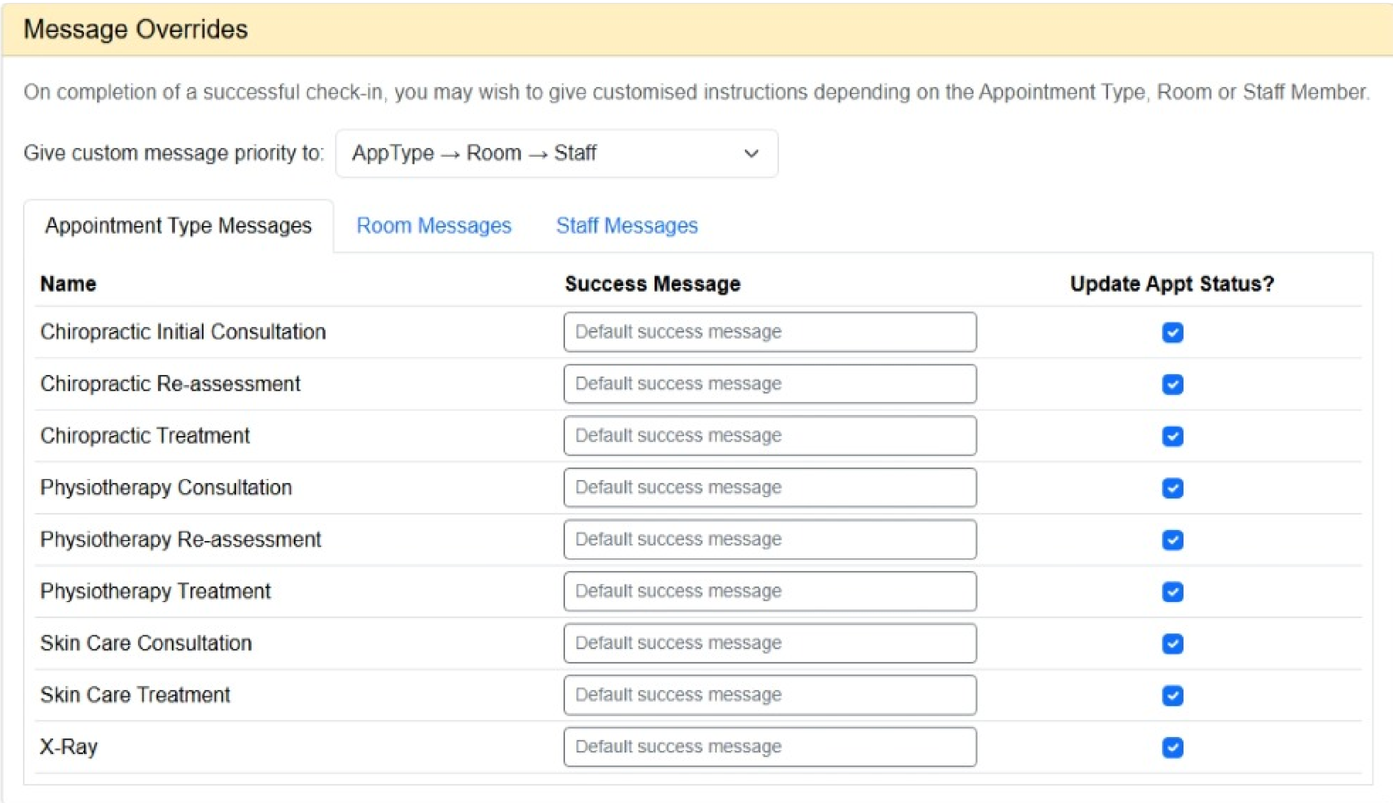
To create a new profile, select your settings, type in the profile name into the "**Create New Profile**" field and click **Create**.

From the Site Settings, you can select to hide the menu buttons such as the **Settings** and **Logout** buttons. You can also set how often the check-in process should reset itself due to inactivity.



From the Check-In Settings section, you can specify the scope of appointments you wish to check the patient against. By default, the system will check appointments going two hours into the past and future.

You can also specify when a check-in is considered late or early, which clinic the current check-in system applies to and whether it should check for consecutive appointments. You can also define messages such as the “Welcome” or “Not Found” messages.



The Message Overrides section allows you to customise the order in which a message will appear based on appointment type, room and staff. You can also define bespoke messages based on these three areas. This is useful if, after checking in for a particular appointment, you need to give specific instructions. For example, maybe based on a particular appointment type or room, the patient needs to be directed to wait in another area of the clinic.

The Visual Settings section allows you to customise the heading and Start, Back and Reset button texts. You can also adjust the site heading colour, the three buttons' colours and their sizes.

Any changes you make to the settings, please remember to click the **Save Configuration** button to save the settings to the current active profile.