Check-in and Check-out Procedures

The therapist will typically check-in their own patients in PT Everywhere as they prepare for their day. Greet patients by name if possible when they enter. If they are an existing patient just let them know their therapist will be out momentarily. If they make small talk or mention anything upcoming in their lives, you can make a “Private Note” in the “Appointment Details” by clicking on the appointment and hitting the black edit button on the bottom of the screen. This will then show a bookmark on the top of their appointment so you can follow up with them on it at the next appointment.

New Patient Check-in

1. When you arrive in the morning make sure all new patients have completed their “Policies and Consent to Treat” form. Patients must have this document completed prior to seeing their therapist for the first time, if it is for a new treatment plan, or has been over a year since they were last seen. When a new patient is scheduled for an initial evaluation PT Everywhere automatically sends their documents to the email address on the account. The link for this paperwork is only valid for 7 days. On the 5th day, if the patient has not yet created a password, another email is sent with the password link. On the 6th day, if the patient has not yet created a password, a third email is sent to create a password. If they have not completed the paperwork and it is anytime after day 7 you will need to resubmit to them.

    a. Option 1: Direct the patient to click *Need help logging in?* on the login page to request a password reset using their email.
    b. Option 2: Go to the patient's Profile, scroll down to the bottom and click *Reset Password* to email the patient a new password link.

1. If the patient is a new patient, make sure the paperwork is done. If the paperwork is not done, ask them to check their email for it. You can resend the paperwork through their dashboard to make it easy for them to see it. Most likely they won’t have time to complete the “Intake Packet” and the therapist likely won't have time to review it before the appointment so you can just make sure they sign the “Policies and Consent”.
    a. Click on the Documents tab on the top of their portal. Hover over the line for the Policies and Consent form and once the pointer turns into a hand click to open the document. Click Submit to resend it to their email.
2. Once any paperwork has been completed you can let the patient know that the therapist will be out to get them soon. Mention the location of the restroom in case they need to empty their bladder before any possible internal examinations. Otherwise they can make themselves comfortable for a few minutes.

<u>Check-out Procedure</u>

The therapist will bring their patient to the front desk to check out. They will share any information we need about the patient, wins or break throughs from their treatment, give them

their “at-home” exercises, and let us know how soon to reschedule them. You can schedule multiple appointments at once, especially if they have a specific time spot needed.
As you go to check out a patient after their appointment:

1. Verify card/form of payment information (or check if they have a payment plan) and process payment for appointment.
    a. This is what to do after the patient has completed their appointment and you are billing their card. Click Patients at the bottom of the schedule in PT Everywhere. This will bring up a list of patients being seen today on the left side of the screen. Click on the three bars to the right of the patient’s name and click “Check Out”. You can also right click on the scheduled appointment and choose “Check Out”
    b. This should bring you to the “Payment” section in the patient’s profile. Click Save in the top right corner. This should bring up the invoice. Verify with the patient that we are billing the card on file. If you need to verify the card you can open a separate session of PT Everywhere and check the payment source on file. If they need to change the card, you can switch to a different one or add another card here too.
    c. Click Pay Now in the top right corner. Verify the information on the payment screen. If it is a “new patient special” you will enter the discount where it says “Enter promotion value” and enter a description of the discount in the next field. If they pay with cash or Venmo click the Cash button, Check button for a check, and Card on file if paying by card.
    d. If paying by card, a “Payment Processing” screen will pop up. Click “Make Payment”. You will then get a small “Notice” pop up letting you know if the payment was successful.

        i. In order to split payment between cash and card, or two cards, or any other combo, just click on the dollar amount when processing their payment and enter in the desired amount, and click on the first form of payment. Follow the same process for the remaining amount and second form of payment.
    e. If the patient has an agreement with the provider to trade fee for service,

2. Check the patient’s dashboard to see if they are already scheduled out for an appointment
    a. If not, find a time to reschedule them within the therapist’s recommendation
    b. If so, verify the date and time for the appointment with the patient to ensure clear communication and minimal scheduling issues

<u>Cash Payments:</u>

Cash Payment Procedure

When a patient pays their balance in cash:

1. Go to the locked drawer and take out the envelope that contains cash from previous payments.

2. Add the patient's cash to the envelope.

3. Count all the cash in the envelope and make sure the totals match the following standard amounts:

- **$1 bills:** 25
- **$5 bills:** 4
- **$10 bills:** 10
- **$20 bills:** 10
- **$50:** 2

Any additional cash that goes over those limits needs to be taken out, put into an envelope, and placed on the manager's desk. Write the date and amount of cash on the envelope.