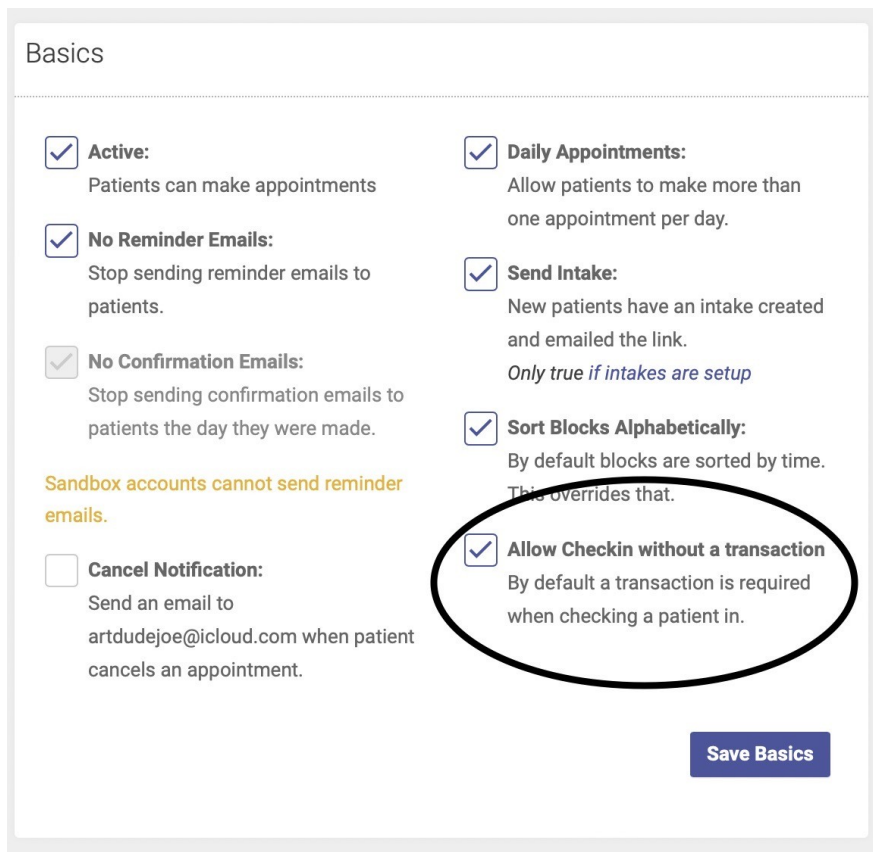


Check in without recording a transaction

You can check in a patient without recording a transaction by enabling the checkin without transaction feature.

Getting started

To turn on this feature, go to your Settings page. In the Basics section, click the Allow Checkin without a Transaction box:



The image shows a screenshot of a settings page titled "Basics". It contains several toggle switches and checkboxes. The checkbox for "Allow Checkin without a transaction" is circled in black. Below the settings is a "Save Basics" button.

Basics

- ☒ **Active:**
Patients can make appointments
- ☒ **No Reminder Emails:**
Stop sending reminder emails to patients.
- ☒ **No Confirmation Emails:**
Stop sending confirmation emails to patients the day they were made.
- Sandbox accounts cannot send reminder emails.**
- ☐ **Cancel Notification:**
Send an email to artdudejoe@icloud.com when patient cancels an appointment.
- ☒ **Daily Appointments:**
Allow patients to make more than one appointment per day.
- ☒ **Send Intake:**
New patients have an intake created and emailed the link.
Only true if intakes are setup
- ☒ **Sort Blocks Alphabetically:**
By default blocks are sorted by time. This overrides that.
- ☒ **Allow Checkin without a transaction**
By default a transaction is required when checking a patient in.

Save Basics

Note: the default setting is to require a transaction at the time of checkin. If you'd like to check in patients without a transaction, you'll need to opt in to this feature.

Be sure to click Save Basics when you're finished.

How to check-in without recording a

payment

First, click the checkbox next to the patient's name on the schedule. The popup that appears will show two options: **Check In + Payment** or **Check In Only**:

Checkin & Payment

For Domino Dalmatian

At 9:00 AM

Check In + Payment **Check In Only**

Charges	Amount
acupuncture Treatment	20
Payment Total	20.00

Click **Check In Only**—this will eliminate the payment and transaction boxes from the popup window. Then click the green Checkin Only button in the bottom right hand corner of the popup box:

Checkin & Payment

For Domino Dalmatian

At 9:00 AM

Check In + Payment **Check In Only**

Check In Only

☒ CheckIn Only will not complete the transaction for this appointment. Click the red check to finish the payment transaction.

Checkin Only

The checkin check box next to the patient's name will now appear in RED—this is your reminder that you still need to collect and record the patient's payment:

9:00 AM

☒ Domino Dalmatian

9:10 AM

When you're ready to collect and record payment, click the red check box. This will bring up the popup window, where you can record the transaction (you also have the option here to reverse the

checkin, if you checked in this patient by mistake):

Checkin & Payment

For Domino Dalmatian

At 9:00 AM

Reverse Checkin Only

This appointment was checked in without a transaction.

Reverse Checkin

Charges	Amount	
Description of Charge	30	+
Payment Total	30.00	

Buy TokensBuy Credits

Add A Note...

☒ VISA **9969: card on file

☐ Check

☐ Cash

☐ Other

Check In And Pay

New Main

Save the customer card for later?

Charge In Person Card

Add Just A Note

Add a note only

Save Note

Once you've recorded and saved the payment, the patient will appear in yellow on the schedule:

9:00 AM

Domino Dalmatian

9-10 AM

Here's a quick screen recording showing how it works:

Revision #4

Created Tue, May 17, 2022 12:18 PM by Alexa Hulsey

