Private Practice Check-In

Quick Start Guide

Thank you for subscribing to Private Practice Check-In. Below are the basic steps to get started quickly with the software.

Set up your online account

When you login to your account for the first time, you will see the name of your practice, and the buttons: **Update, Add Practitioner,** and **Logout**. The Logout button will make it so that you need to re-enter your e-mail address and password again to continue to use the system.

Demo Therapy

> Update

> Add Practitioner

> Logout

Adding Your First Practitioner

If you click on the **Add Practitioner** button, the system will prompt you to enter the practitioner's name and notification address.

Demo Therapy

Practitioner Update:

Example: joe@email.com (e-mail), @TwitterHandle (Twitter), 9545551212 (10-digit phone number)
Twitter user must follow @ppcheckin to receive DM notifications.

⬍ | Pracitioner Name | | Practitioner E-mail, Phone, or Twitter | X

> Update

> Add Practitioner

> Logout

There are three types of addresses that can be used for practitioner notification:

1) E-Mail address – Simply enter the e-mail address of the practitioner. Ensure that the practitioner has notifications configured on their mobile device for this e-mail address. To avoid the potential for notifications going to spam, practitioners can "whitelite" the e-mail address **reception@ppcheckin.com**.

2) Twitter handle – Enter the practitioner's Twitter handle, starting with the atsign ('@'). **Important: The practitioner must follow @ppcheckin from that Twitter handle in order to receive the DMs sent by the system.**

3) Phone number – Enter the practitioner's phone number, digits only. **SMS messaging is an optional add-on to the subscription.** The website will not allow you to enter phone numbers if you have not added this service.

Enter your first practitioner name and address into these fields and click **Update** if you are done for now. If you want to add more practitioners, you do not have to click Update until you are done. But it's important to note that whatever changes you make on this screen will not take effect until you click the Update button.

You can continue to add practitioners and/or edit these fields. Click Update when you are done.

*Tip: You can have multiple addresses for each practitioner if you separate them by **semi-colons** (;). When a client checks-in, all of the addresses will receive a notification. Example: steve@exampleMail.com;@StevePhdTherapist;2125551212*

Reordering the Practitioners (*Note: Only works on laptops and desktops at this time*)
The Kiosk will show the practitioners in the order in which they appear on this administration screen. You may have noticed the double arrows on the left side of each row:

By "grabbing" on to these arrows (holding the mouse button) and dragging the rows around, you can reorder the therapists to your preference.

Demo Therapy

↕ George Washington	george@whitehouse.gov	X
↕ Thomas Jefferson	tom@whitehouse.gov	X
↕ John Adams	john@whitehouse.gov	X
↕ James Monroe	james2@whitehouse.gov	X
↕ John Q. Adams	john2@whitehouse.gov	X

[Update]

[Add Practitioner]

[Logout]

Don't forget to click **Update** after you've made all of your changes.

Removing Practitioners

To remove a practitioner, all you need to do is click the red X to the right of their row. As always, you'll need to click the Update button for this to take effect.

When does the Kiosk Update?

Making changes on the administration page causes the changes to take place on the *server*. The kiosk itself checks periodically for changes. It could take several minutes to be updated on the screen. Therefore, there is a way to force the kiosk to update, described in the last section below. It is recommended that any changes (particularly changes in the order of practitioners) be made when someone is nearby the kiosk to refresh it.

System Options

From the administration page, you can change three things: 1) The "banner" or welcome message that appears at the top of the tablet screen, 2) How clients check-in, and 3) How the practitioners are identified.

Change welcome banner and options:

Welcome Message:
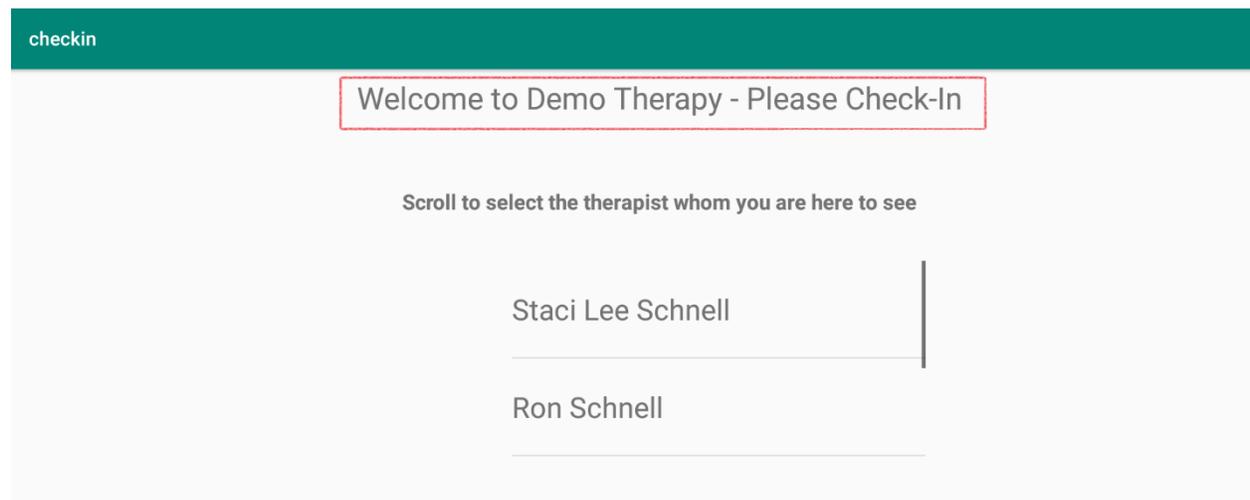
Welcome to Demo Therapy - Please Check In

Notification options: ○ Plain initials ● Appointment time only (HIPAA compliant)

How to refer to a person on the list: (Fits in "Scroll to select the _____ whom you are here to see"): Examples: therapist, attorney, practitioner, person, etc.

attorney

Change Options

The banner message is straightforward. You can see where it is located on the tablet in the screenshot below.
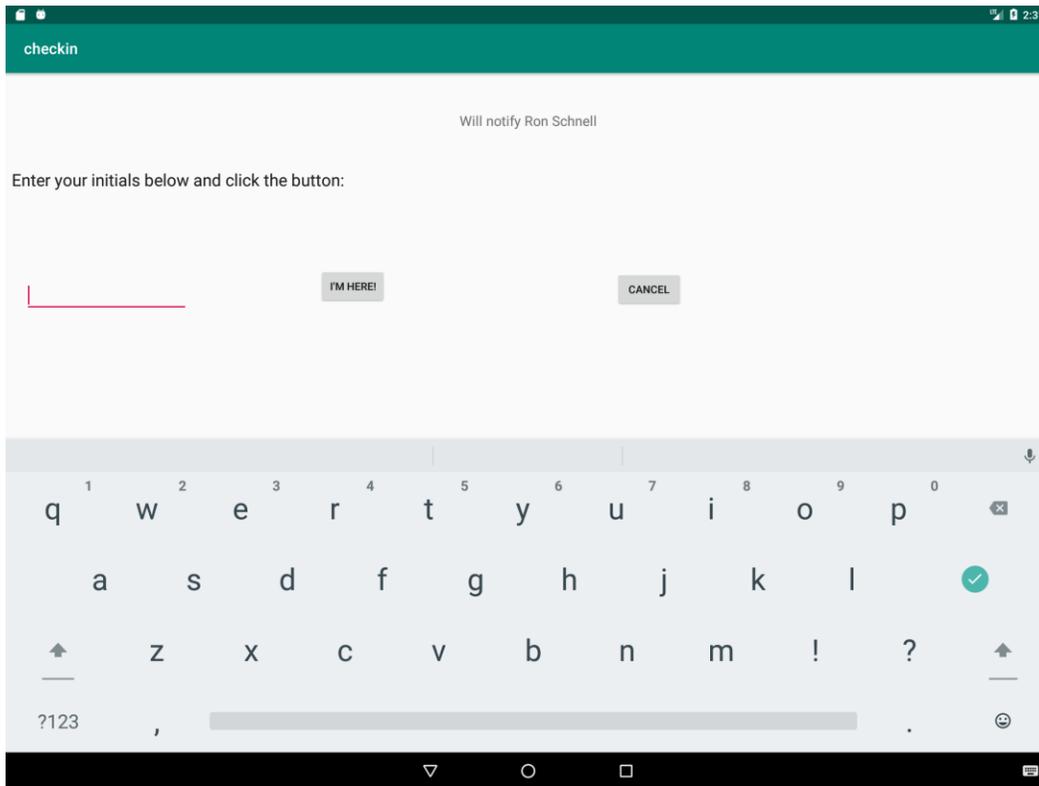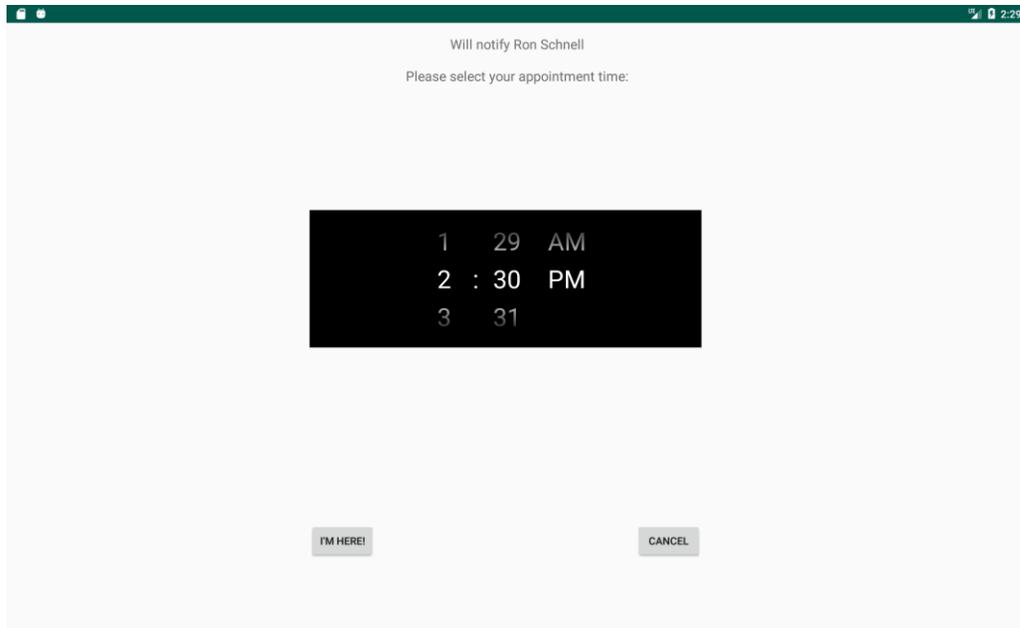

There are two possible check-in modes:

1. Plain text initials – In this mode, clients are prompted for, and practitioners receive their initials. These initials are sent in "plain text". The message and initials are completely unencrypted. This is most useful for situations where HIPAA is not a concern, such as law offices or other types of facilities.
2. Time-only check-in – In this mode, the system will prompt the client with a "clock" that is pre-set to the next quarter-hour mark, and the client is invited to set it to their

appointment time. The practitioner is notified that their appointment for that time has arrived. This mode **guarantees HIPPA compliance.**

Tip: These options will update on the kiosk itself within a few minutes, or you can follow the refresh procedure in the last section, below.
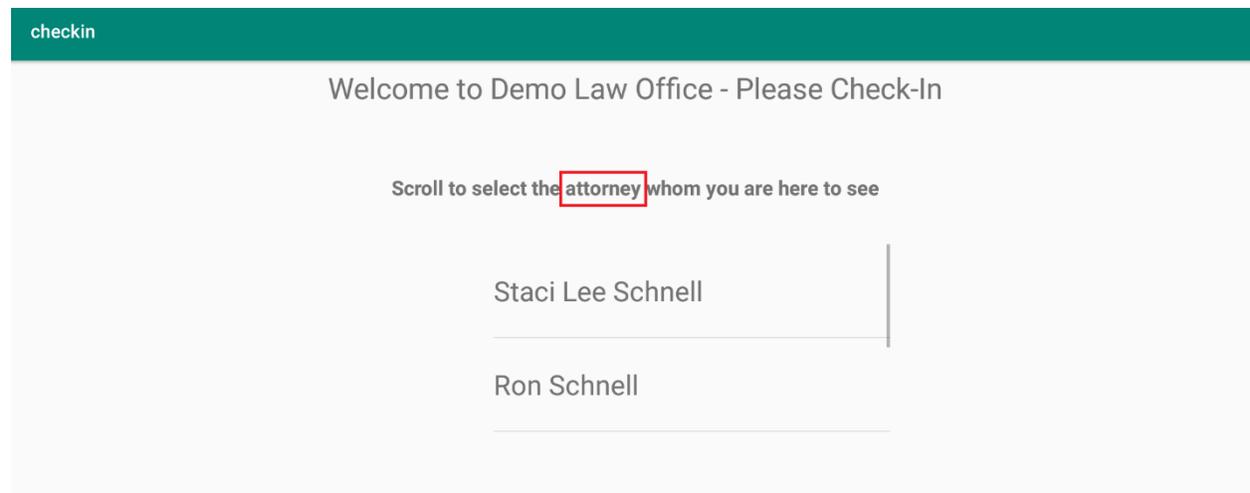

Initials Check-In

Appointment Time Check-In

The third option allows you to set the descriptive word that is used to describe the practitioners. The word you enter is used in the greeting screen, as shown below:
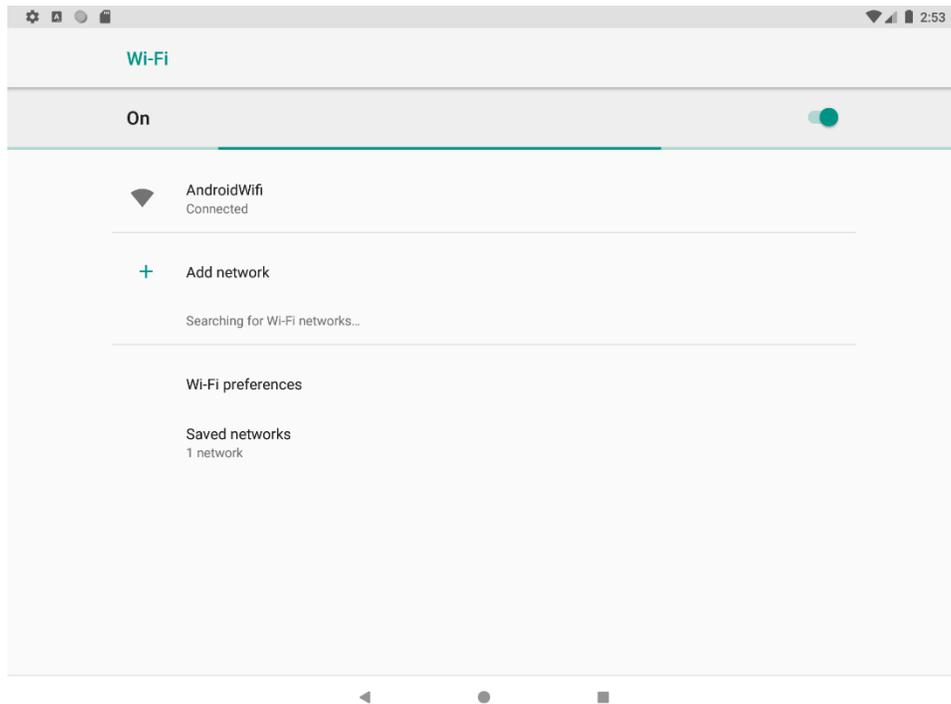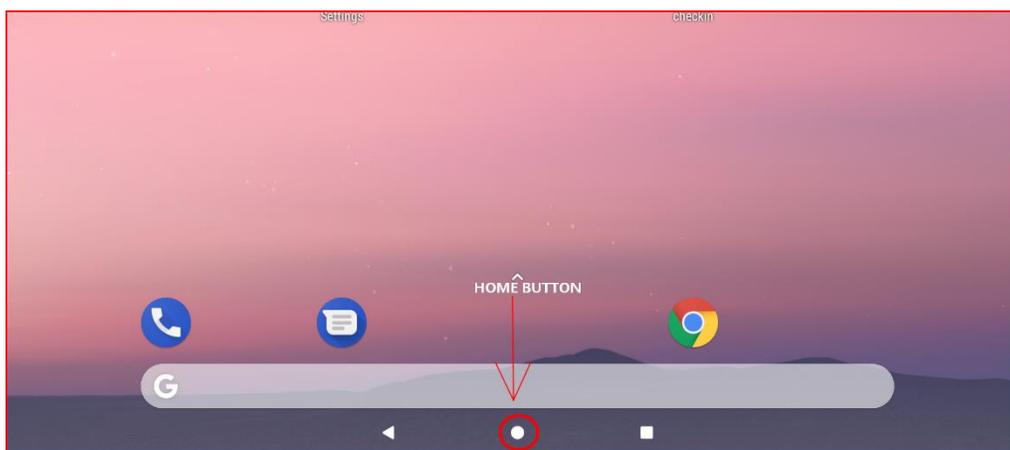

Set Up the Kiosk Software

After powering up the tablet, you will need to swipe up the lock screen and enter the PIN code. You should have received the PIN code from us.

Once the tablet is unlocked, the first thing you need to do is have it join your Wi-Fi network. On the home screen you will see a **Settings Gear** icon. Press this button and then select Wi-Fi from

the submenu. Click on the Wi-Fi network you want to use, and enter any passwords or security keys needed. You should not have to do this again (as long as you don't need to change networks).

Go back to the home screen by pressing the *circle* at the bottom center of the screen (you can always use this to get to the home screen this way, except when you are running the Private Practice Check-In app).

You can now click on the **Checkin** icon to start the app. When the app starts, it will tell you that it will be *pinned* to the tablet, which means that only someone with the PIN code for the tablet can exit the app. You need to select **Got It** in order to successfully pin the app.
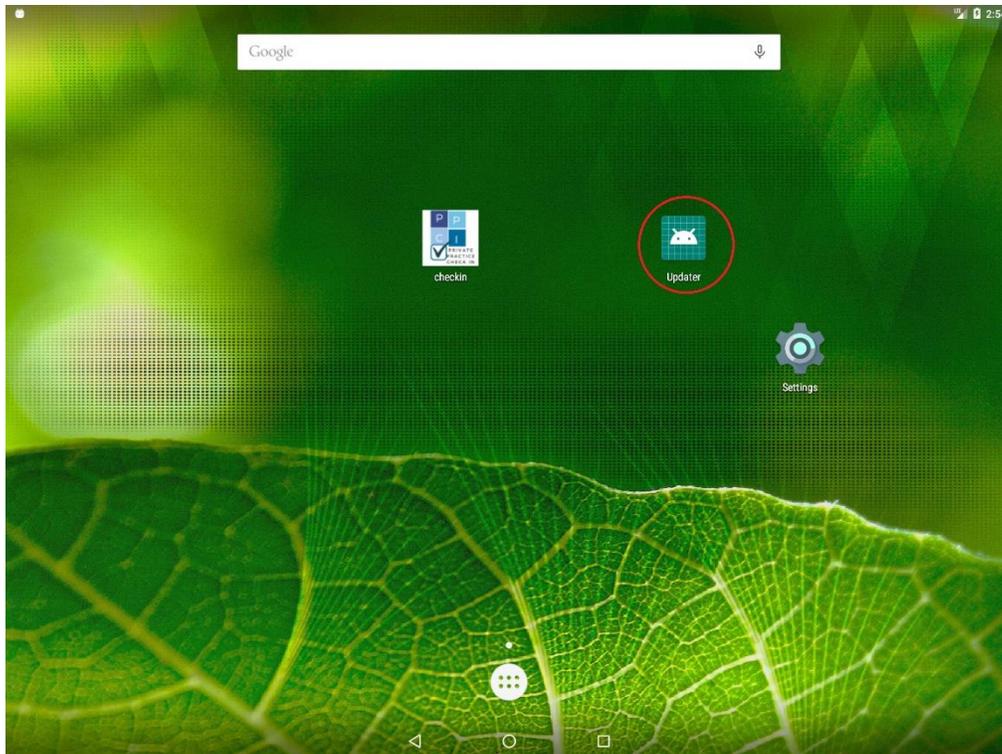
Exiting the App

You should rarely need to exit the app. Since the app is pinned, you cannot use the normal navigation buttons to exit. To exit pinned mode, you need to press and hold the **back** and **overview** buttons:

This will get you back to the lock screen, which you can swipe up and enter the PIN code. Once you do this, the app will be unpinned, and you can use the **home** or **back** buttons to exit the app.

Updating the App

If you need to get the latest version of the app, use the icon on the home screen called "Updater". It will do everything necessary to install the latest version. Simply agree to all of the prompts.

Refreshing the Kiosk

As discussed above, the kiosk checks for changes on the server every so often. If possible, it is recommended to *force* the kiosk to refresh when a change has been made from the administration page.

This can be done without exiting the app. There is a hidden button inside of the "welcome" banner at the top of the main page. This usually has the name of your practice on it. If you tap anywhere within the banner, it will force the kiosk to get any changes from the server, right away.

checkin

CLICK ANYWHERE IN THE BANNER TO FORCE A REFRESH

Welcome to Demo Therapy

Scroll to select the therapist whom you are here to see

Staci Lee Schnell

Ron Schnell