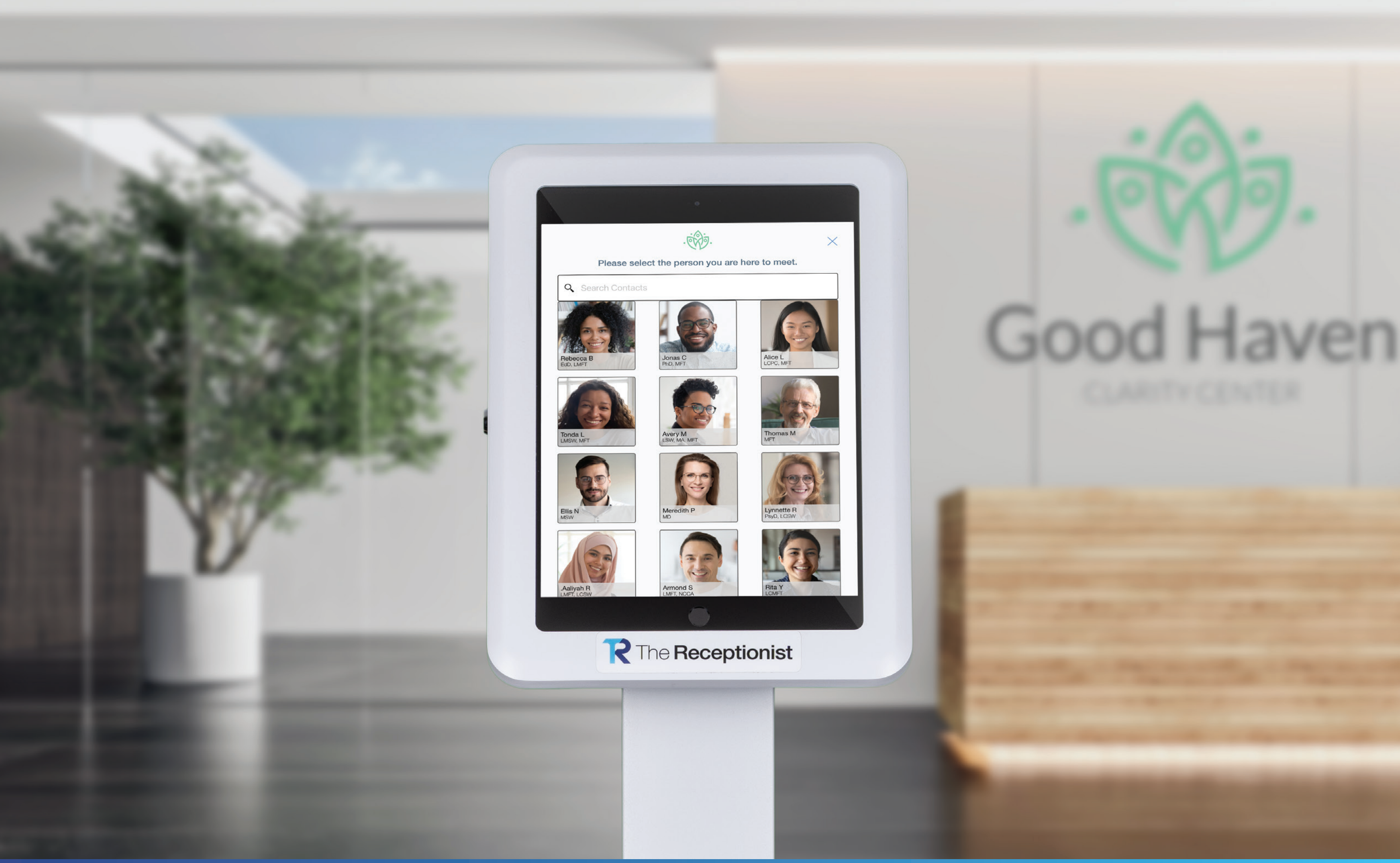

The Receptionist for iPad
Ultimate Guide to Client Check-In Systems

★★★★★

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Introduction

Today, we're refreshingly transparent about prioritizing mental health and wellness. But some skeptics hold onto the idea that therapy only involves asking and answering the cliché question, "How does that make you feel?" With clear, positive impact from private practices, it's amazing that old sentiments prevail.

And, somehow, so does using a pen and paper to keep track of client visits and appointments.

Digital check-in systems are reimagining one of the most important aspects of behavioral health services: a provider's first impression from the moment a client steps into a practice waiting room. That may seem to give the humble lobby too much credence, but it does play a role.

But because of its importance, let's say you decide you want to add a client check-in system to your own lobby. Sifting through all the options to find the right fit for your particular practice, however, seems like more work than is worth the reward.

Is a solution like this really worth my time?
Will it actually make my life easier?
How exactly does it add value to my practice?

Well, we're here to help. This guide provides a comprehensive overview of what to consider when evaluating different client check-in systems and what features to look for based on your practice's needs.

By the end, you will be able to choose the right client check-in system to ultimately:

- Improve your operations
- Enhance patient experience
- Seamlessly grow and manage your practice

Table of Contents

Client Check-In System Considerations

Before you begin researching the different solutions out there, make sure you know what you need and what you don't. Here are the top considerations and questions to ask when evaluating a client check-in system.

What Level Of Security Do You Need?

When talking about security, it's important to consider every aspect of it: data security, privacy, and physical security.

- **Data Security and Privacy** — Client data must be kept secure and comply with privacy regulations such as HIPAA. Ensure that the client check-in system helps meet these standards and has safeguards in place to protect client information.
- **Physical Security** — When considering physical security, you want to evaluate how prepared you'd like to be in the event of an emergency. And client check-in systems play a role by offering features like evacuation lists that give you an immediate, real-time glance at who is in your office or building. Communications and notifications can be sent out to that list in the event of an emergency.

How Important Is Access To Support And Customer Service?

It can be intimidating to think about navigating new and unfamiliar software. And tech support is like a box of chocolates - you never know what you're gonna get. Luckily, you can mitigate that risk by finding a software company that offers unparalleled service.

Many companies with excellent tech support have a few green flags you can look for if you anticipate needing a little extra attention when it comes to onboarding and continued assistance:

- Multiple channels for contacting a support team, such as chat, email, and phone
- Detailed and thoughtful support articles
- Availability of Onboarding Specialists
- Knowledgeable and responsive staff
- Positive online reviews

Do You Need The Ability To Run Integrations?

An integration, or the ability to link two different software systems to communicate and exchange information, can be a useful tool to keep all of your data organized and to improve operational efficiency. Just as not every client and therapist are a match, certain software systems may not be compatible with others. If you're thinking about integrating your existing systems, such as Electronic Health Records (EHR) or scheduling software, into your client check-in software, make sure that the solution you choose has a way to support it.

Do You Need To Plan For Scalability?

If you plan to expand your practice, it's important to choose a client check-in system that can scale with you. This means looking for a solution offering an unlimited number of visits and the ability to adjust the number of contacts. Also consider if you'll need more than one configuration AKA more than one check-in station or kiosk at your location.

What Level Of Customization Do You Need?

Different practices have different needs, so it's important to choose a client check-in system that can be customized to meet your specific requirements. If you want a lot of control over how your system looks and your client's experience with it, look for a system that is highly customizable.

This can include the ability to add:

- Custom fields and questions to collect specific information
- Branding and logos
- Unique workflows and messaging

Will You Need Reporting?

To improve your practice's operations, it's helpful to choose a client check-in system that provides analytics and reporting. Look for systems that can track wait times, check-in times, most popular times, and provide actionable insights.

How Much Should You Pay?

Often, the first questions that come to mind when choosing client check-in software are 'how much does it cost' and 'what is it really worth to you?' Depending on your needs and the features a system offers, the price might not always be right for you. And evaluating the cost of software isn't particularly straightforward. But to start, it's helpful to understand how payment works.

Most client check-in software operates on a subscription model, either on an annual or monthly payment schedule. The price of your subscription will vary depending on a variety of features and functions. For private practices, the most important determinant will be the number of contacts you need.

Contacts (sometimes referred to as employees or users) are individuals set up in your system to receive visitor notifications.

Some companies base their pricing model on the number of contacts you can add. Others are based on access to features. Some charge based on the number of visitors you have. You might even come across a combination of all three.

Key Features When Evaluating a Client Check-In System

Now that you have a good understanding of what you want, need and how to integrate that into the best solution for you and your practice, we can start talking about specific features. We've broken down the features into two categories:

- Those we believe you must have for your practice
- Those that are simply nice to have

Must-Have Features

☐ Client Check-In Notifications	☐ Security and Confidentiality
☐ Digital Visit Log	☐ Branding

☑ Client Check-In Notifications

Likely the main reason you're looking for a client check-in system in the first place is to be notified when your clients arrive. So, notifications are a must-have when evaluating which solution to get for your practice. Other notification considerations include:

- **Notification Settings:** You want to make sure the notification settings have everything you need. If your practice has other practitioners, look for a system that allows you to assign contacts to particular visitors. So, when a visitor arrives, the appropriate practitioner is notified.
- **Backup Contacts:** You'll want a system that can assign backup contacts to visitors in the event the primary contact is busy and can't welcome the client right away.
- **Multiple Platforms:** Your system will want to include notifications via multiple platforms, like text messages, email, Slack, Teams, etc.

Digital Visit Log

A digital visit log is like the glass plate in your microwave; it goes more or less unnoticed until you don't have it. And for that reason, your client check-in system should have a digital visit log. For ease and flexibility, you'll want a log that is exportable, filterable and searchable.

Security and Confidentiality

As a professional working with confidential client information, the importance of software that prioritizes security and confidentiality is always top of mind. A client check-in system is itself a form of data security and confidentiality as it eliminates paper logbooks that leave previous client names and information open to prying eyes.

Moreover, when sifting through different options, there are a few additional features to look for to ensure maximum data security and client confidentiality:

- Secure hosting on AWS servers in the U.S.
- Unlimited data retention
- Cloud-based visit logs
- Ability to permanently delete records

Branding

Elevate and modernize your practice with the ability to add branding to your client check-in system. Adding your branding and logo to anything is guaranteed to give a more personal and professional feel. A check-in system should give you the option to do the same, such as adding a logo to the home screen or generating a custom welcome message.

Nice-To-Have Features

- ☐ Visit Notes
- ☐ Confirm Contact Information and Insurance
- ☐ Forms and Screening Tools
- ☐ Distinguishing Between Clients and Other Visitors

Visit Notes

Visit Notes are a useful feature that allow you to add comments about a particular visit. For example, use a Visit Note to remember to confirm that a client has been billed for a particular appointment.

Confirm Contact Information and Insurance

It seems everywhere we go, our information is saved in one system or another. Which is why it only takes a few seconds to spend hundreds of dollars shopping online (thank goodness for free returns!).

But, life happens — people move, get married, change their jobs — and information changes. If you're in charge of managing that information, you're in charge of keeping it up-to-date.

So, when evaluating a client check-in system, a great feature to include is the ability to generate questions throughout the check-in process. This allows you to ask your clients each time they come in for an appointment if their contact or insurance information has changed.

Forms and Screening Tools

Behavioral health practices often need clients to sign forms, like informed consent, or require additional information from patients during the check-in process, such as health screening information or billing changes.

Client check-in systems allow you to create custom forms or upload your own in order to collect this information. If this is a feature you need, choose a solution that allows your clients to digitally sign those forms and have them stored under their check-in record.

Distinguishing Between Clients and Other Visitors

Clients might not be the only visitors coming into your office. The best check-in system for behavioral health private practices are those with the ability to distinguish between different types of guests and create custom workflows for each. This keeps your office organized and ensures you're accommodating everyone who walks in the door.

How A Client Check-In System Benefits Your Practice

A check-in system is designed to make your life easier. There are tangible benefits that will improve your management, operations, and practice overall.

- Efficiency and simplicity for practitioners and clients
- Create a personalized experience for your clients in your lobby
- Grow your practice and keep operating costs low
- Keep client information up to date

Efficiency And Simplicity For Practitioners And Clients

Instituting a client check-in system is the easiest way to improve efficiency within your practice. You no longer need to stress about what's happening at your front desk. Your clients know exactly what to do and expect. No one is left waiting unnecessarily, and you no longer have to leave your office to see if your next appointment has arrived.

Create A Personalized Experience For Your Clients In Your Lobby

Therapy is one of the most personal experiences you can have. And every part of that experience should reflect an air of connection and personalization, even including in the lobby when checking in. And a check-in system gives your clients a highly personalized experience as soon as they walk in the door.

A Personalized Experience: Check-in systems quickly and easily sign in any visitor with just a few taps of a button. Your client can even choose their therapist from a list featuring each provider's photo. Once checked in, the appropriate practitioner is notified that their client has arrived. The practitioner can immediately head over to the lobby to get their client or send a message notifying them that they are wrapping up another session and will be with them soon. Either way, your client has the best experience as soon as they walk in the door.

Grow Your Practice And Keep Operating Costs Low

Like with most businesses, as your practice grows, so will overall operating overhead. You may need to add another clinician to your practice or move to a larger space. It's during this time when many practice owners ask themselves:

"How am I going to keep up?"

A client check-in system is built to support growing practices, any number of practitioners, and unlimited visitors without hiring full-time staff. (Although, even with front desk staff, a client check-in system is a great supplement to offboard that responsibility so they can focus on more valuable tasks.)

By eliminating the stress at your front desk with a cost-effective, simple solution like client check-in software, you can focus on adding value to your clients and your practice without worrying about the day-to-day management and cost of operations.

Keep Client Information Up To Date

Keeping client records up to date is tricky. As people move and change jobs, their addresses and insurance carriers also change. And, more often than not, it comes down to you to keep their records current and accurate.

A check-in system takes care of that. You can tailor questions as part of the check-in workflow that asks clients if they have had any changes to their:

- Address
- Contact information
- Insurance

Clients confirm the information accordingly and you can ensure that you always have the most up to date information.

Frequently Asked Questions

Are client check-in systems HIPAA compliant?

While we cannot speak to the standards of other check-in systems, at The Receptionist, we take patient information, security, and data privacy very seriously. As such, we help you stay in line with HIPAA standards by:

- Storing all data on secure AWS servers. Read more about AWS HIPAA Compliance.
- Using first name and last initial during check-in
- Offering to sign a BAA

Is there a HIPAA certification for cloud service providers?

There is no HIPAA certification for a cloud service provider (CSP) such as AWS. In order to meet the HIPAA requirements applicable to our operating model, AWS aligns our HIPAA risk management program with FedRAMP and NIST 800-53, which are higher security standards that map to the HIPAA Security Rule. NIST supports this alignment and has issued SP 800-66 An Introductory Resource Guide for Implementing the HIPAA Security Rule, which documents how NIST 800-53 aligns to the HIPAA Security Rule.

Can a check-in system accept payment?

While check-in systems can't accept payment directly, they do have the ability to program a QR code into the check-in workflow. The QR code can be programmed to be linked to the payment page. At that point, a client scans the QR code with their mobile device and completes the payment.

Is it hard to set up or customize?

Absolutely not. The Receptionist, for example, has designated Onboarding Specialists to assist throughout the setup process in addition to demonstrating how other practices use the software.

HAVE A QUESTION? CALL OR EMAIL
888-315-5230
hello@TheReceptionist.com

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