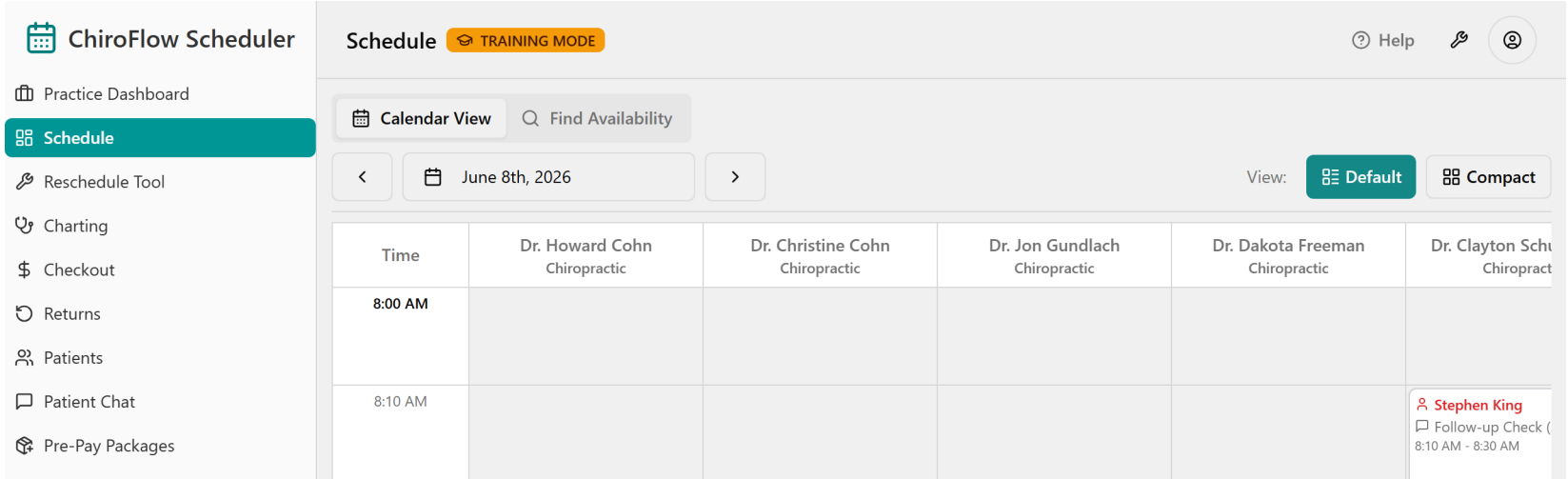
OneBOSS — Front Desk

Cohn Health Institute

Wednesday, June 10, 2026 — one hour, the essentials

- Today: the **things** you need on Monday
- Go-live: **Sunday, June 14**
- Everything else → your printed guides



Why we're here (the one message)

- You already know this job — today you learn the **new place** for it
- **TPS retires June 14** as system of record → stays **read-only** for old history (back to 2004)
- **Your data already moved:** your patients, appointments, products, prepay balances
- OneBOSS **adds up the numbers for you**

> 💡 You can't break anything you can't **undo**.

The hour, at a glance

1. Log in & read the **Schedule**
2. **Check a patient in**
3. **Book** an appointment
4. ⭐ **Checkout & take payment** (the big one)
5. **Pre-Pay** · **Returns** · **Quick Sale** · **Wellness** · find a patient

> Everything deeper is in the **Front Desk Guide (03)** + **cards (07)**.

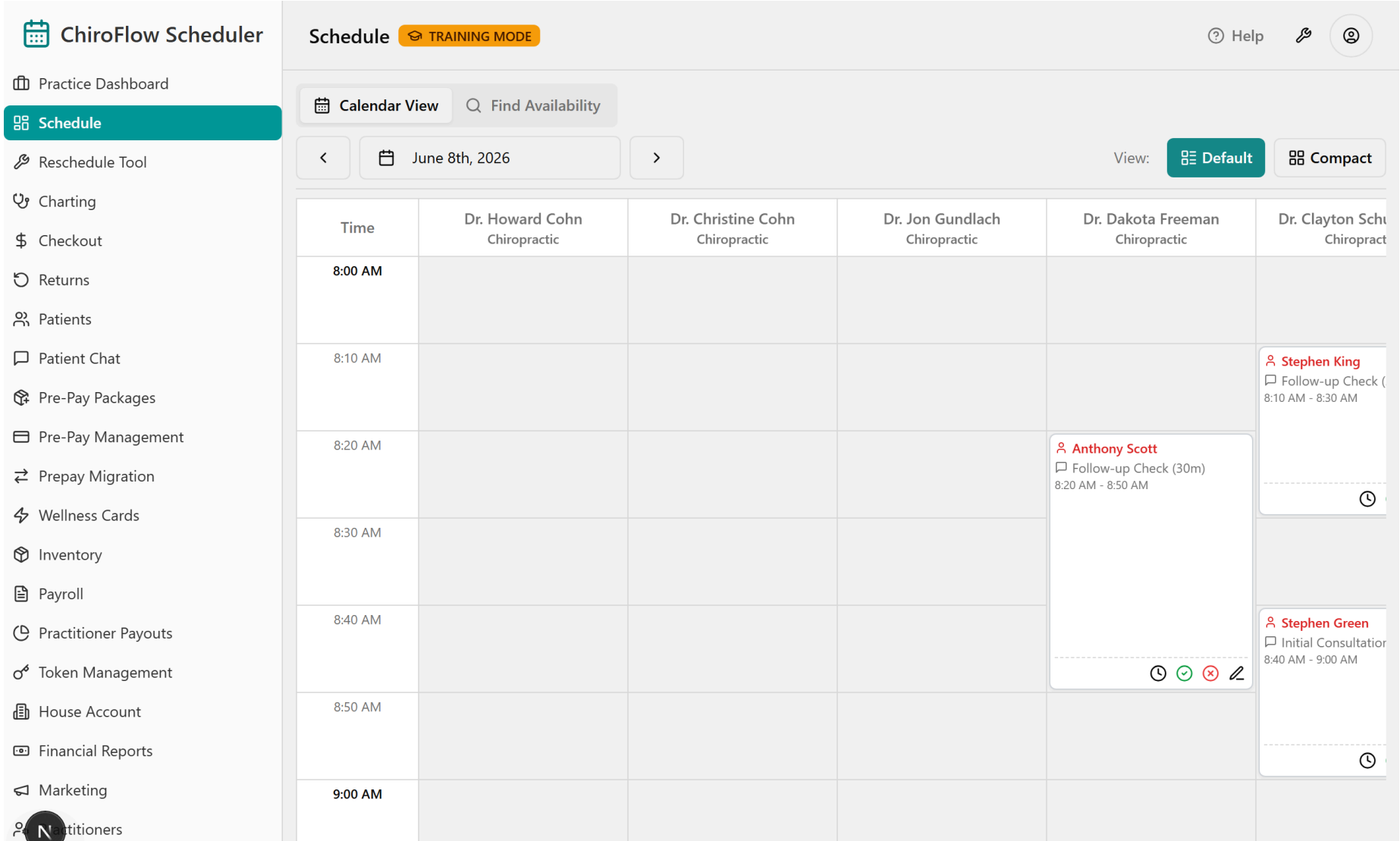
1 · Log in & the Schedule

Read the screen

- **Person icon (top-right)** → **Log in as…** → **your name**
- **Schedule** = your **home base** (top of the left menu, route `/`)
- **Time** down the left (10-min rows) · **one column per practitioner**
- Change days: `‹` **/** `›` or the **date button**

> Deep dive: **03-front-desk-guide §Schedule**

The board (Default view)

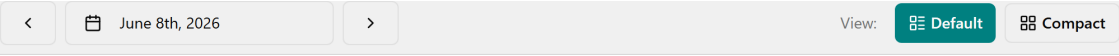


Card colors — read the day at a glance

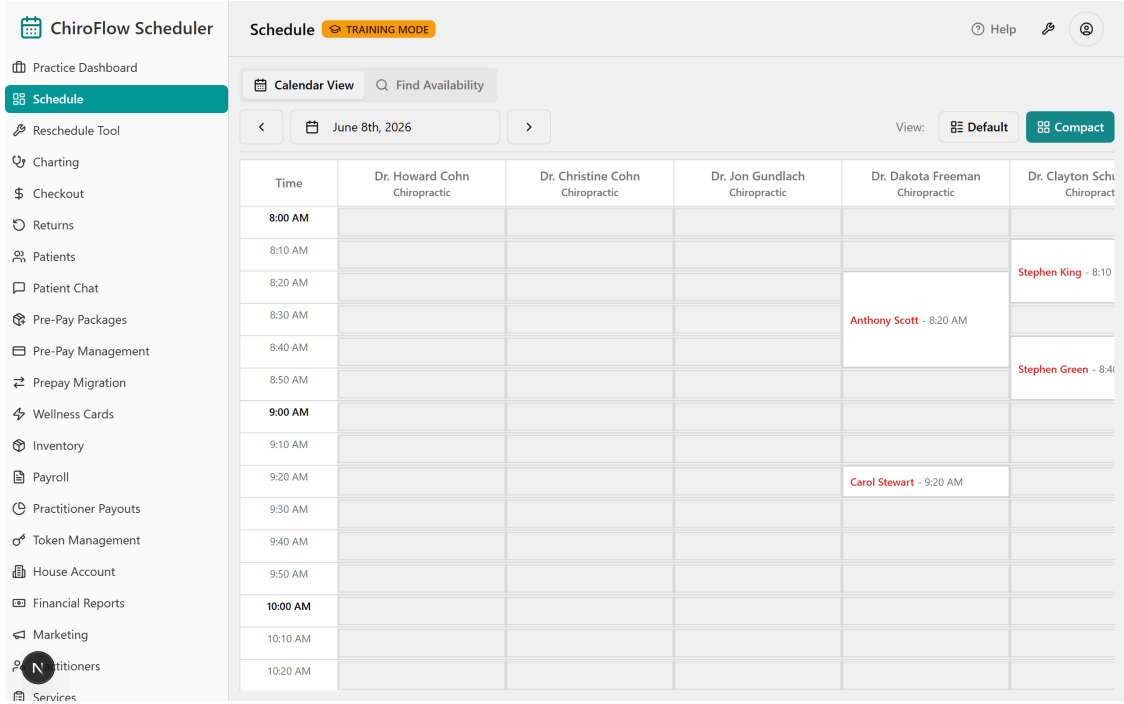
- **White** = scheduled (name alone turns if past start time)
- **Pink** = checked in
- **Muted green** = completed **and paid**
- **Red** = running late / payment overdue

> Pink stays pink until payment is actually taken.

Day nav & Compact view



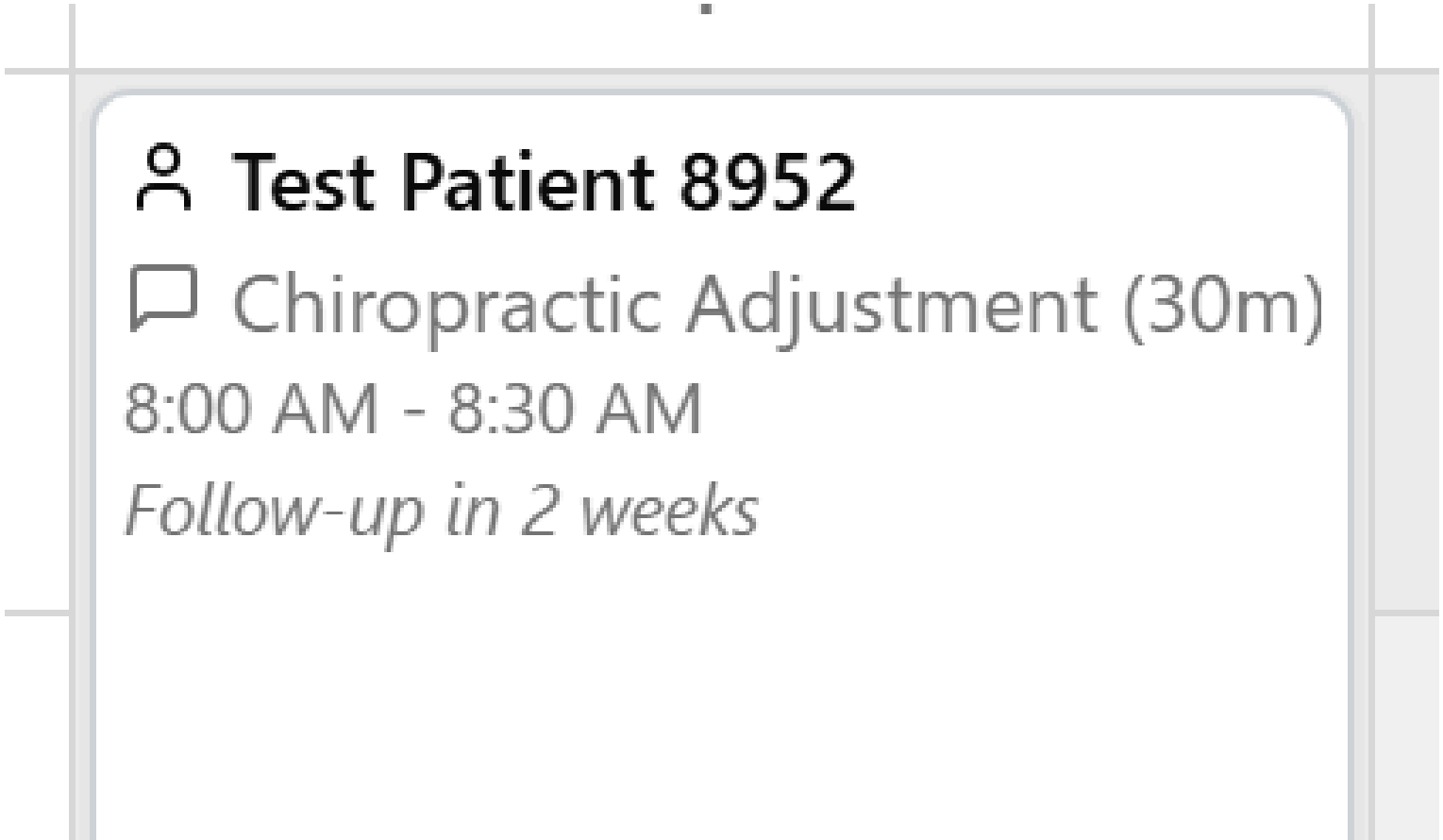
- ‹ / › = back/forward a day · **date button** = jump to a date
- **View: Default** (cards + on-card buttons) or **Compact** (right-click to act)



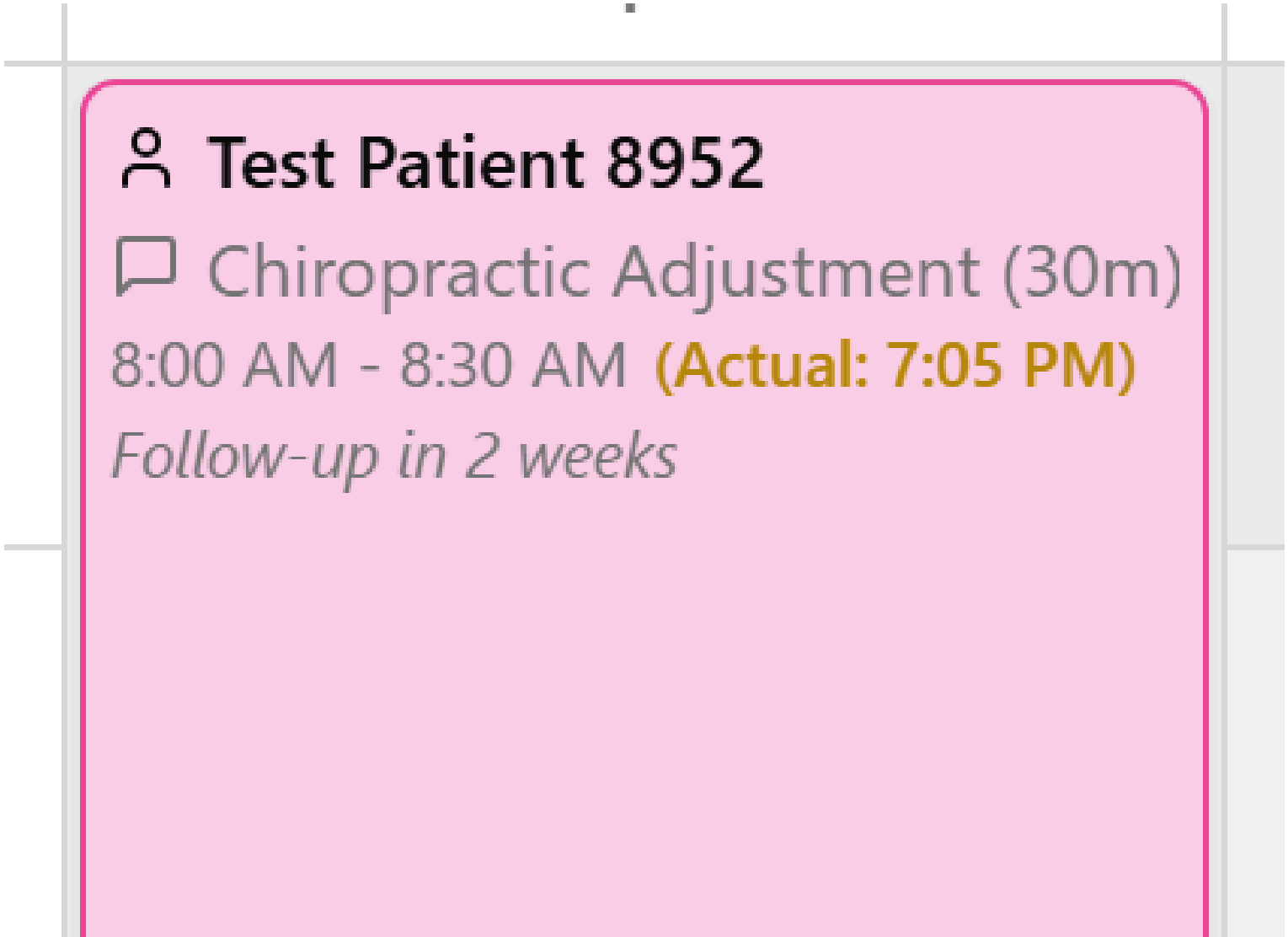
2 · Check a patient in

Check-in

1. Find the **white** card in the right column
2. Click the green **Check In** (or **double-click**) → turns **pink**

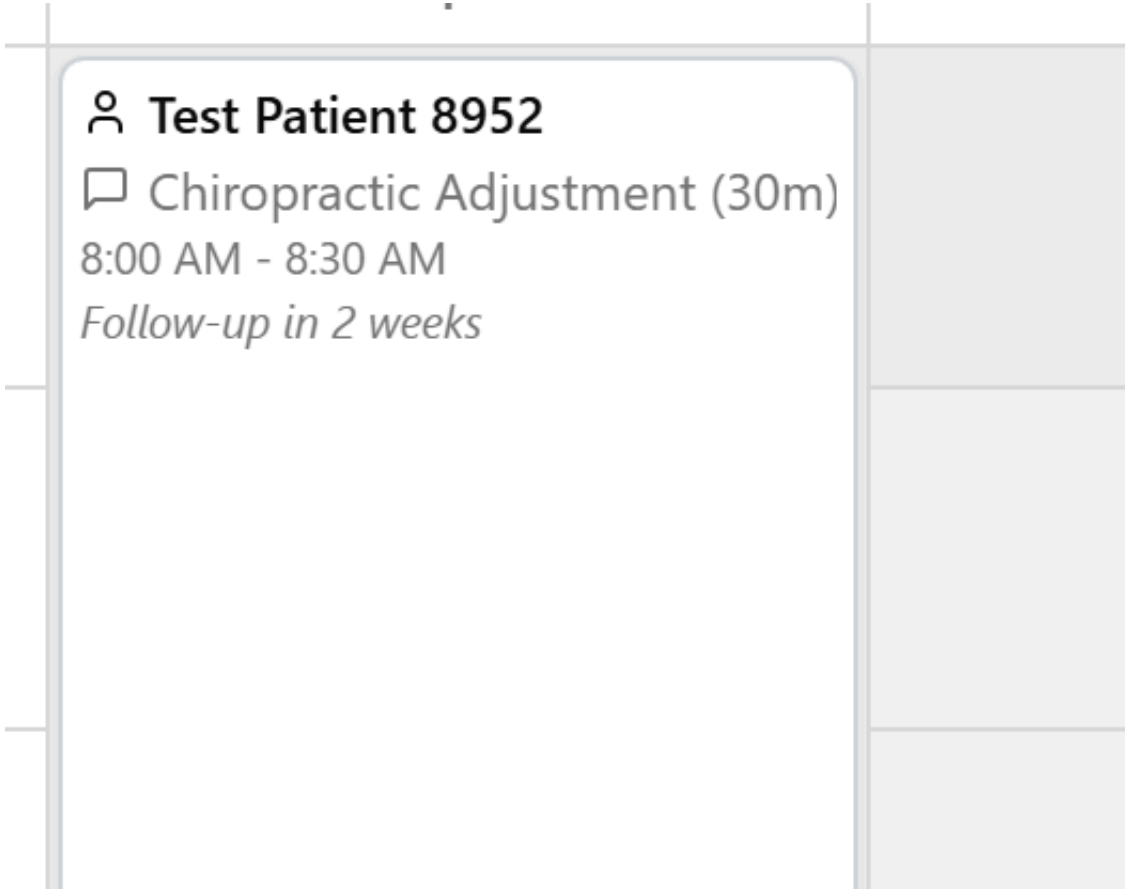


Checked in → pink



Running late + undo

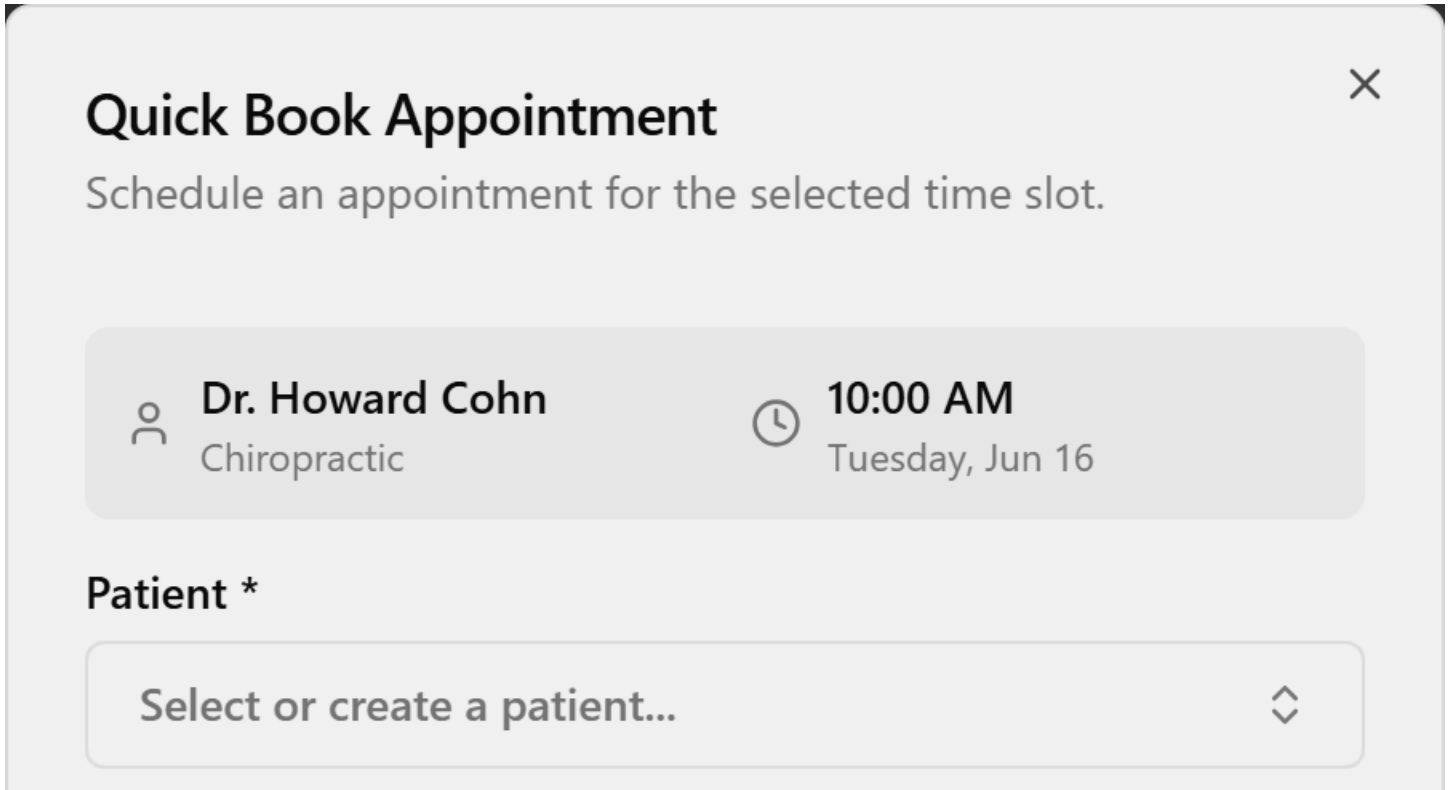
- **White** card → **clock** icon (Default) / right-click **Mark Late** (Compact)
- Type **Late (minutes)** → **Confirm Late** → card turns 🔴



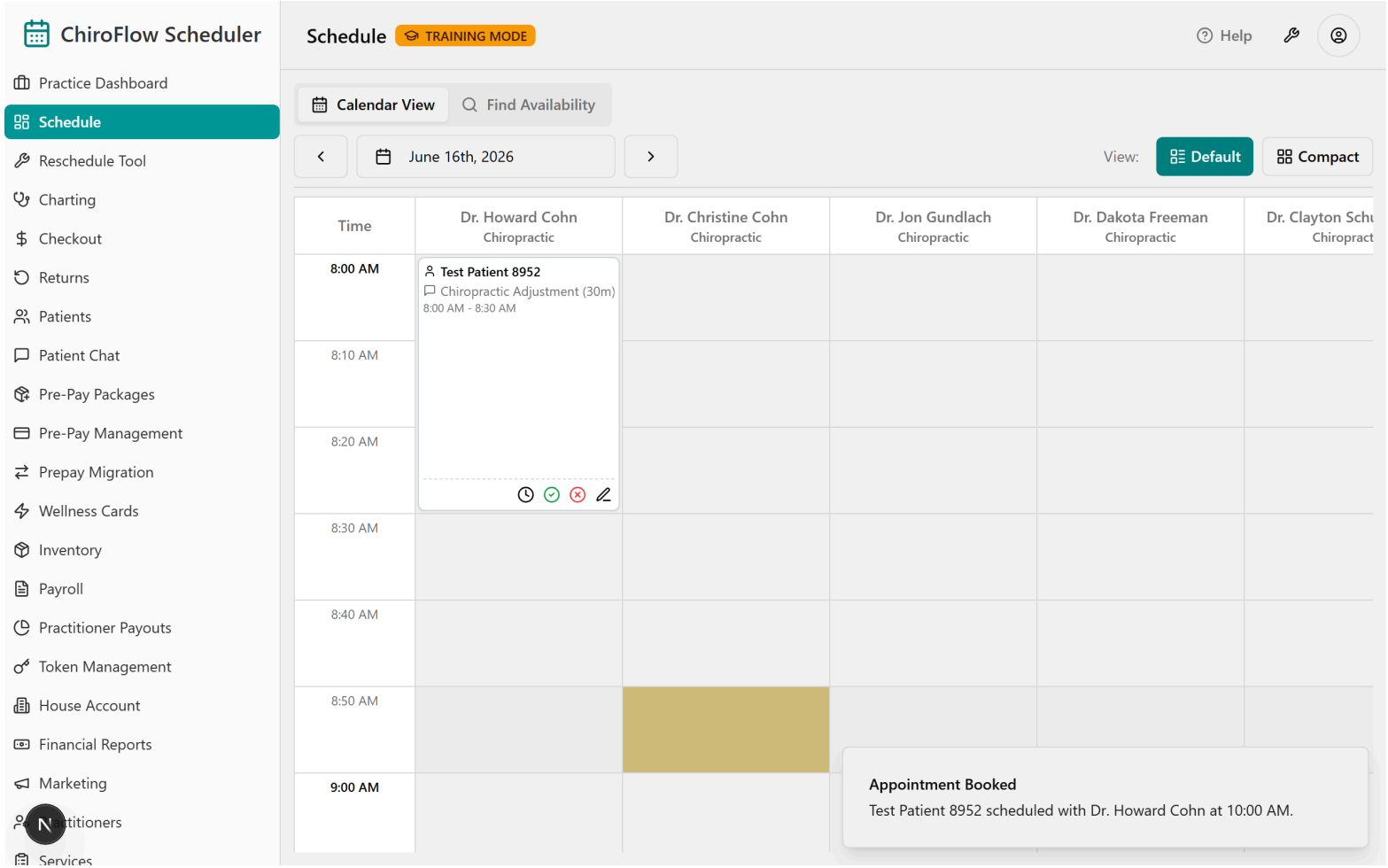
3 · Book an appointment

Booking — the fast path

1. Click an **empty slot** in the practitioner's column
2. **Quick Book Appointment** → **Patient** → **Service** → **Duration**
3. **Book Appointment**



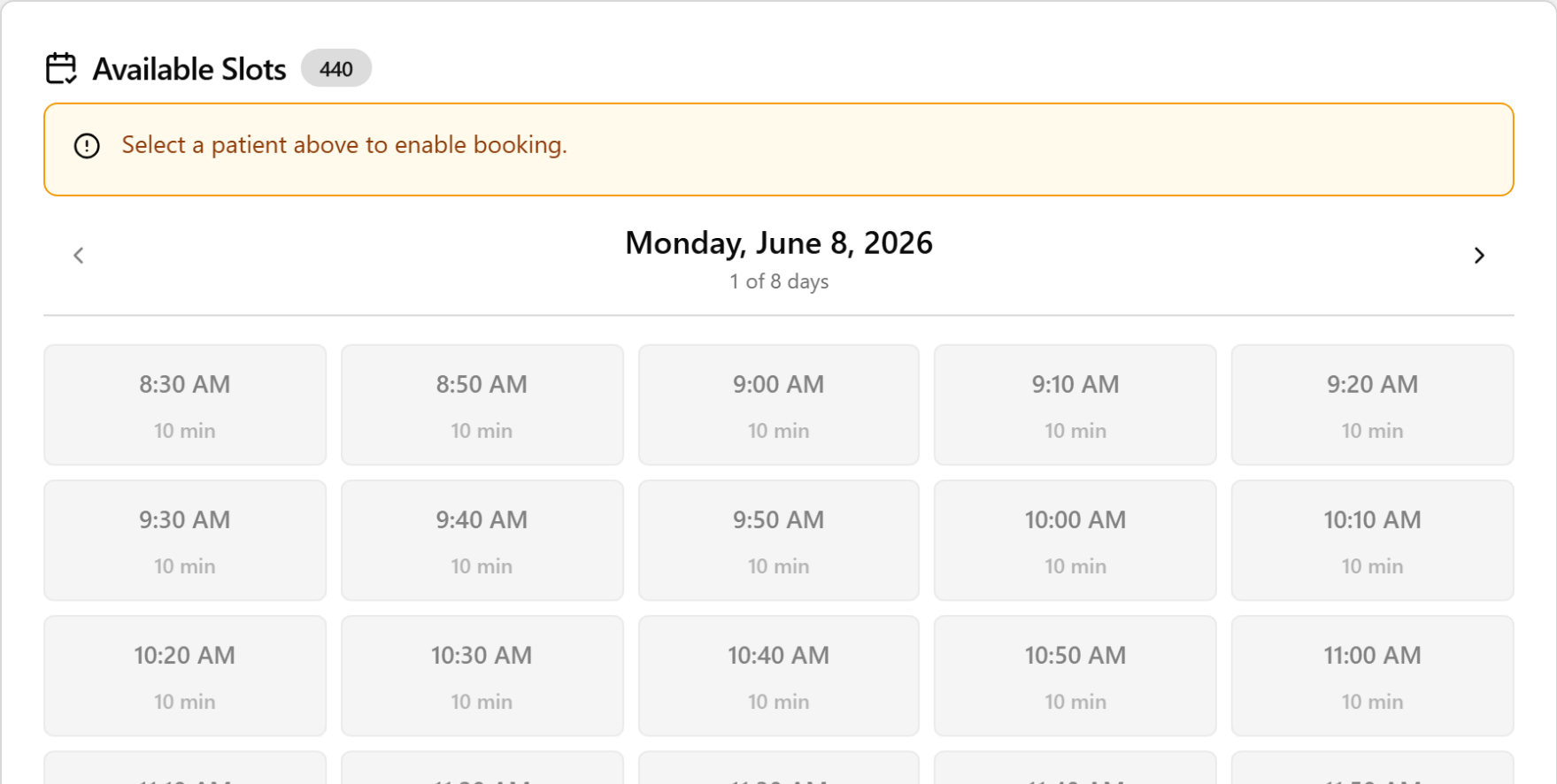
Booked



- Green **Appointment Booked** toast confirms it

Find an opening across several days

- **Find Availability** tab → pick **Patient** (required) + filters + date range
- Searches automatically → click a **time** to book it instantly

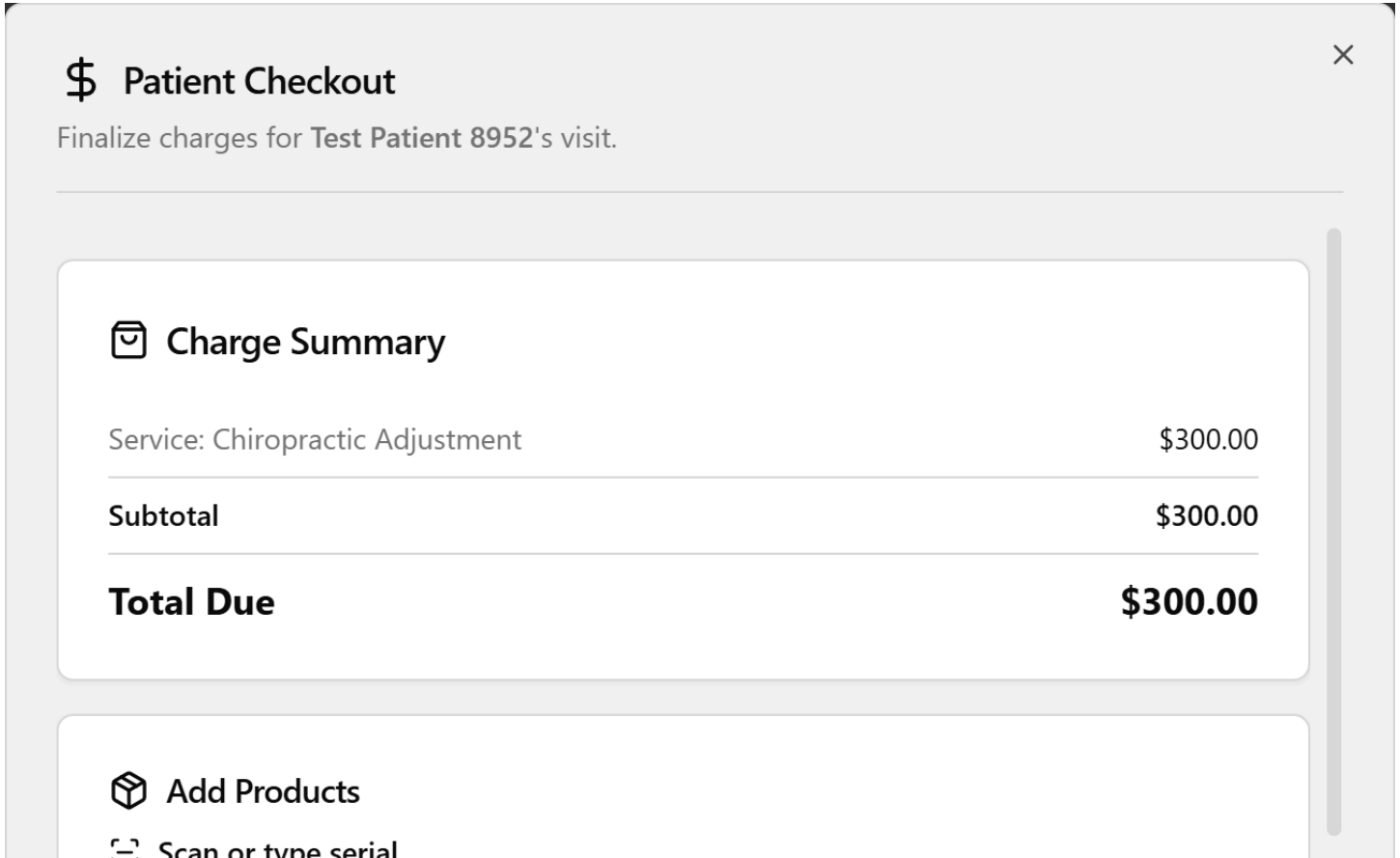


4 · ⭐ Checkout & Payments

the part that matters most

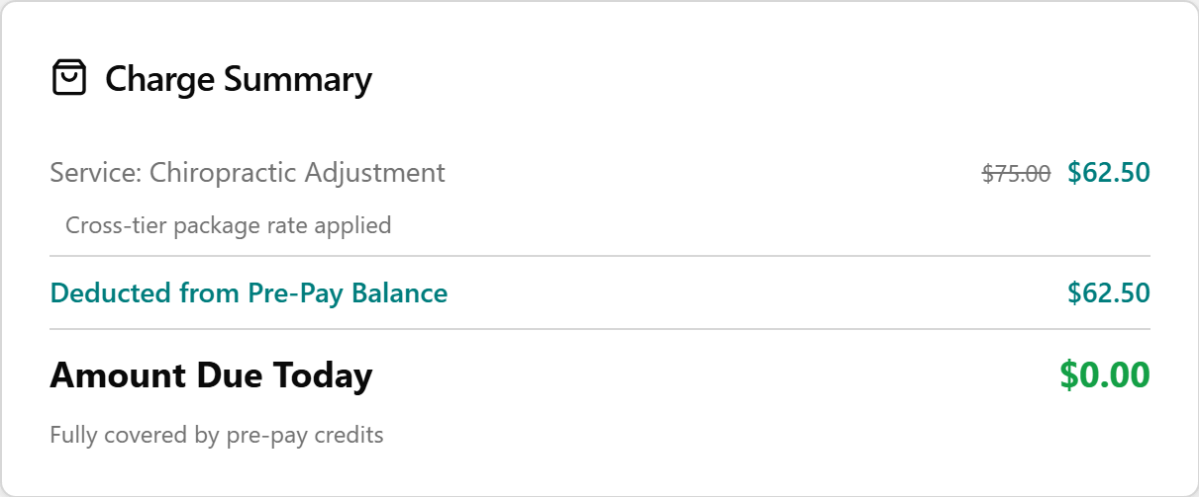
Checkout — start from the Schedule

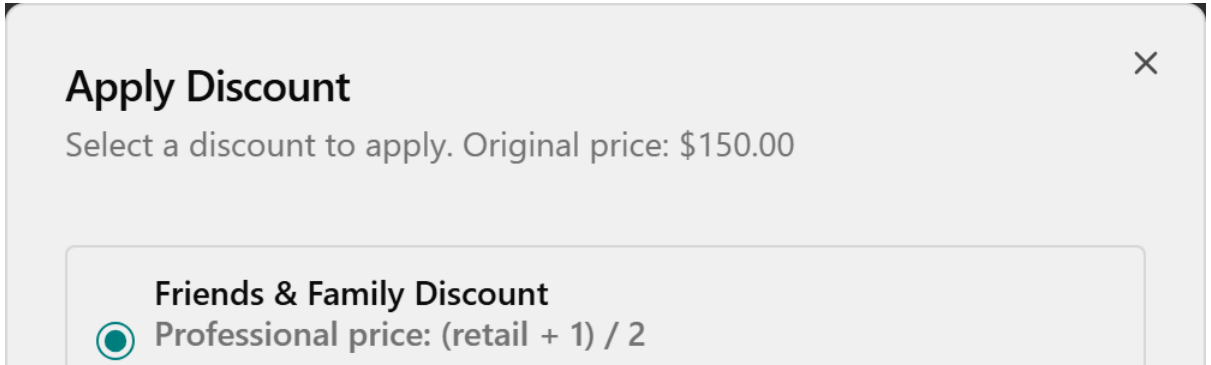
1. **Double-click** a **pink** card → marks **Complete** + opens **Patient Checkout**
2. Read the **Charge Summary** (auto-calculated)



Checkout — apply credit first

- **Pre-Pay package** → covers everything → **Amount Due Today $0.00**
- **Discount** or **CHI Cash** → lowers the total, then collect the rest





Checkout — take payment & finish

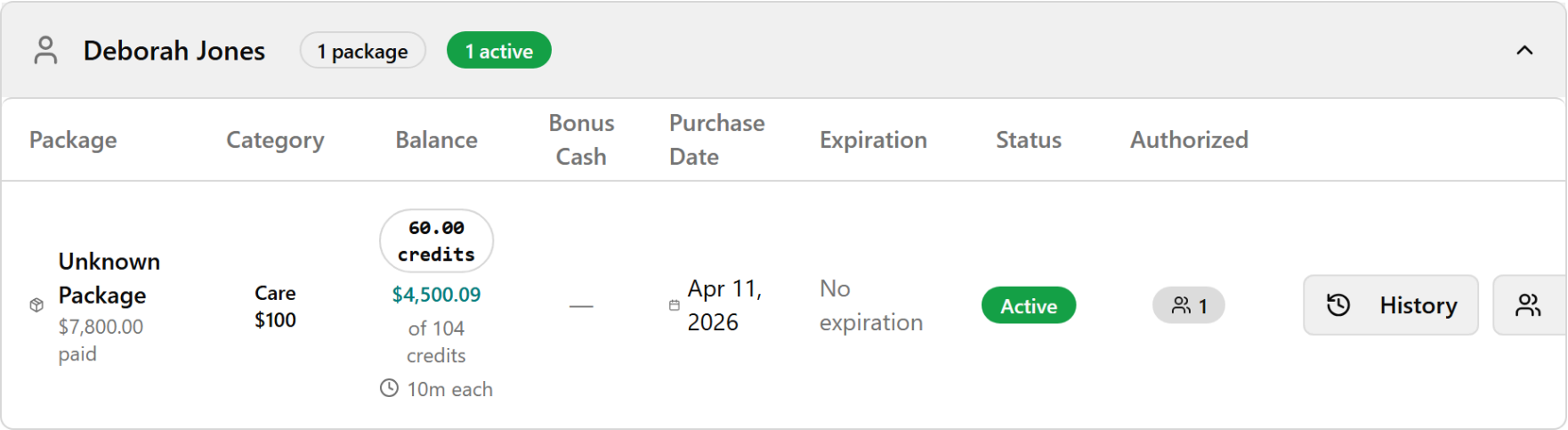
- Add a supplement → **Add Products** → scan the bottle (**one scan = one bottle**)
- **Payment Method** → **Card** → **Pay with Card** → tap/insert/swipe → **Payment Approved**
  - (or **Cash** / **Check**)
- **Complete Checkout** → wait for "**Checkout Complete**"

> ⚠️ Green/paid **only after payment processes**. Unpaid = still **pink**.
> Returns & voids live on **Checkout History** (30-day window).

5 · Pre-Pay Packages

Pre-Pay — sell, share, look up

- All on the **Pre-Pay Management** page (left menu) — **not** checkout
- **Sell: New Purchase** → package → purchaser → (optional) Authorized Users → **Complete Purchase**
- **Find balance:** search → expand row → read **Balance**
- **Share: Manage Users** · **History: History** button

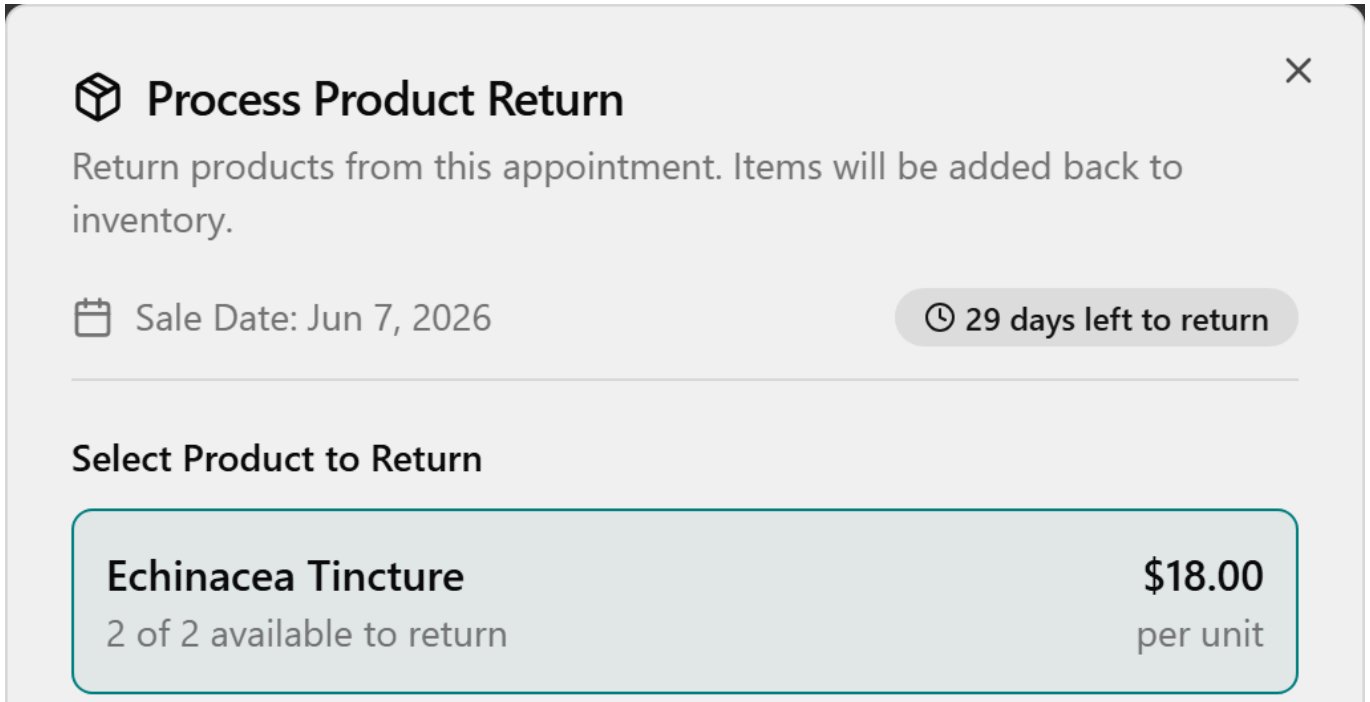


> No top-up button — runs low, just sell another (**New Purchase**). Spend it at

6 · Returns (30-day window)

Process a return

1. **Returns** → **Process New Return** (or **Scan to Return**)
2. Find the sale by patient → check **Time Left** badge → **Process Return**
3. Pick product → **Quantity to Return** → keep **Refund to card** if card sale → **Process Return**



Return history

Return Date	Patient	Product	Practitioner	Qty	Refund	Clawback	Reason
Jun 8, 2026 Sale: Jun 7	**Pamela Mitchell**	Echinacea Tincture	Wellness Therapy	1	**$18.00**	$2.88	-

- **Return History** tab → each refund + any commission **Clawback** (orange)
- Change the **date range** to look further back

7 · Quick Sale

Quick Sale — product only, no appointment

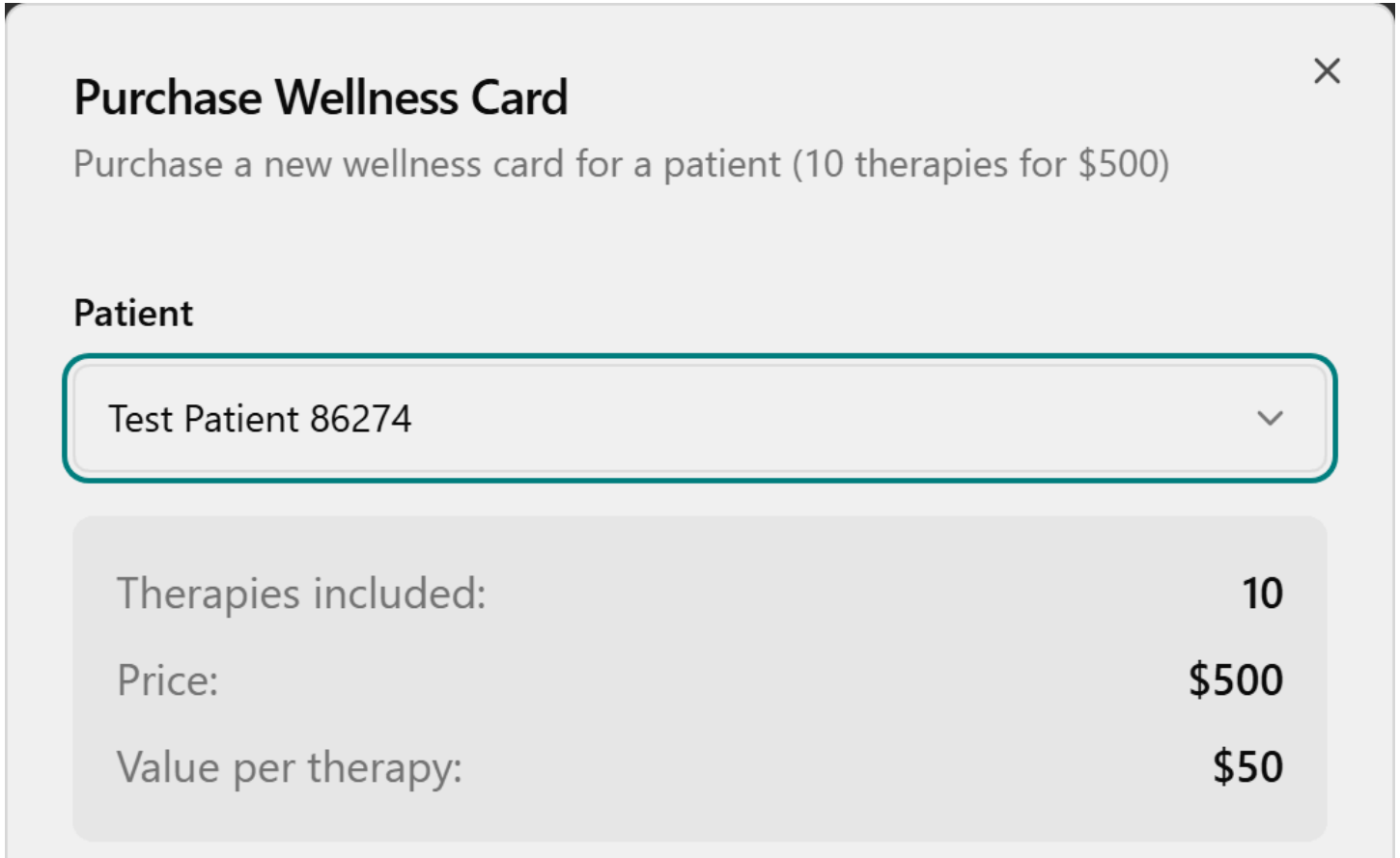
- For walk-up supplement sales with **no visit attached**
- Reach the same **Patient Checkout** flow: pick patient → **Add Products** (scan the bottle) → take payment
- Finish → "**Sale Complete**"

> Same scan, same payment buttons as checkout — just no appointment behind it.
> Deep dive: **03-front-desk-guide §Quick Sale** · cards (07).

8 · Wellness Cards

Wellness Cards — the digital punch card

- Fixed package: **10 therapies for $500** ($50 each) — nothing to price or edit
- **Sell: Wellness Cards** → **New Wellness Card** → patient → **Purchase Card**



Wellness — balances & usage

Kyle Olexa | 2 cards | 2 active | 20 therapies remaining

Purchase Date	Therapies	Value	Status	Actions
Jun 15, 2026	**10** / 10	$500.00	active	History
Jun 15, 2026	**10** / 10	$500.00	active	History

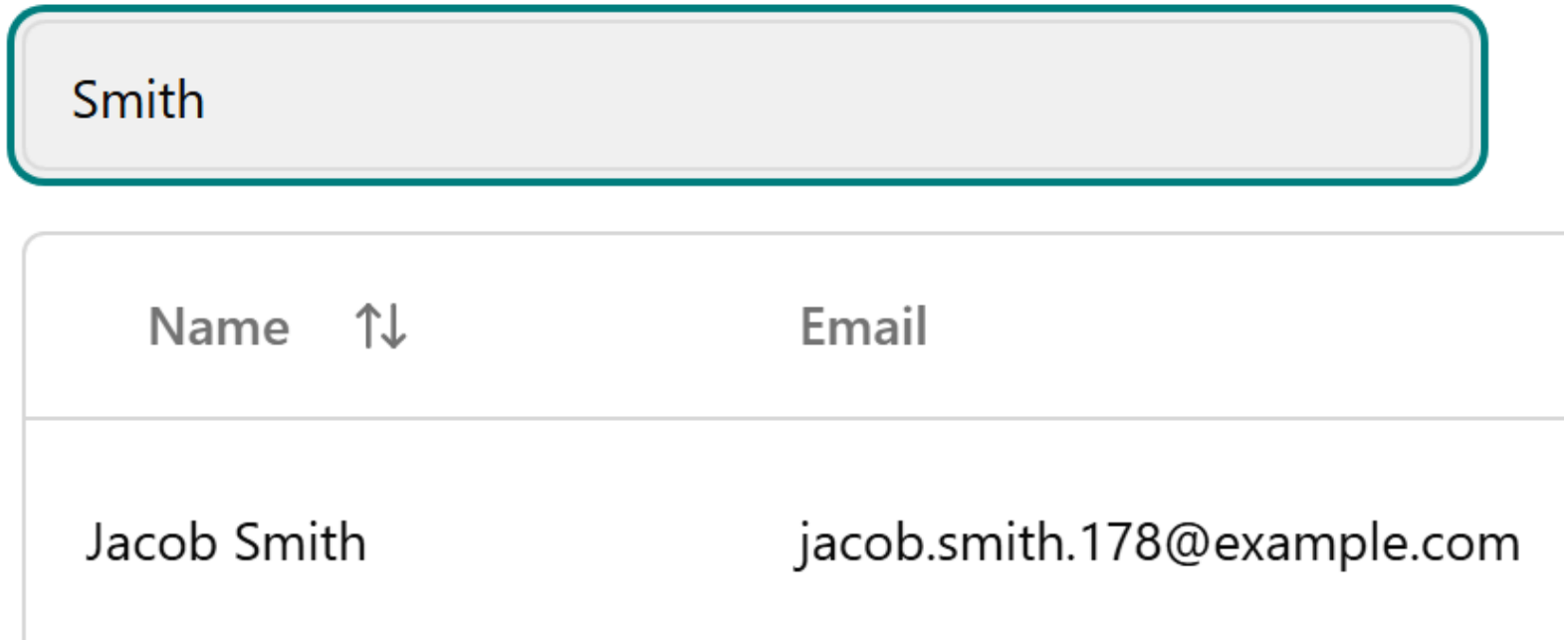
- Search patient → expand row → **Therapies** (e.g. 7 / 10), **Value**, **Status**
- **History** = each redemption · **Management** tab = total **Liability**

> Ticks down **automatically** at checkout when you check out a therapy visit.

9 · Find / add a patient

Patients directory

- **Patients** (left menu) — your whole migrated TPS list
- **Find:** type in **Filter by name** (searches **Name** only)
- **Add: Add New Patient** → **Legal Name** (required) → **Save Patient**
- Row ⋯ menu → **Edit** · **View Chat History** · **Delete** (permanent)



Go-live & your safety net

- **June 14:** OneBOSS for all new work · TPS = read-only history
- **Your safety net:** printed **cards (07)** + **Front Desk Guide (03)** + **FAQ (09)**
- **Reschedule Tool** (left menu) = move a **whole day** when a provider is out (self-study)
- **Support war-room: June 15–19 · Stuck? → call Jessica**

> 💡 You don't have to memorize this. It's all in the guides — and mistakes are undo-able.
> See also: **06-crosswalk** (TPS → OneBOSS) · **10-go-live**.

Questions?

Could you, on Monday: check a patient in → book a slot → take a card payment?

Parked questions get written answers in the FAQ.