HEALTH HARBOR

Harbor Front Desk User Guide

How to run the day at the front desk: arrivals, online check-ins, patients and insurance, booking, reschedule requests and the patient inbox.

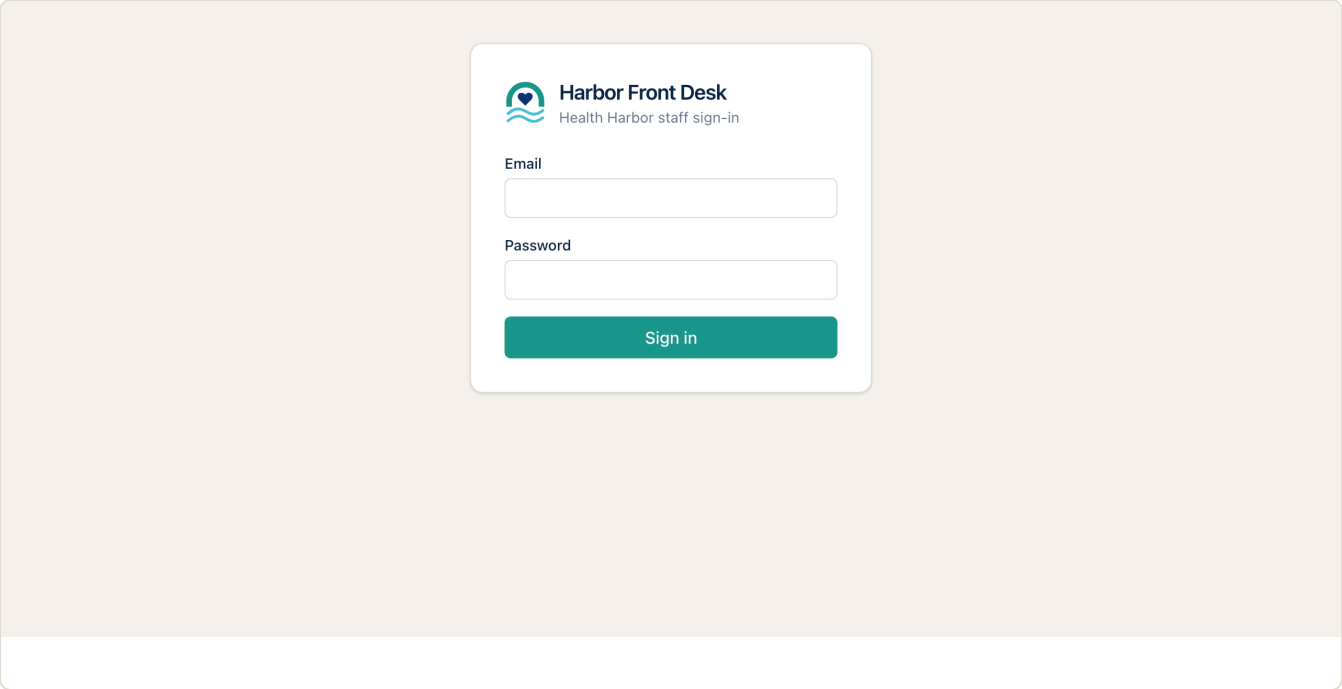
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For Health Harbor front desk staff · Version of November 12, 2026 · Screens show demo data for Harbor Health Mission Valley

1. Signing in

Front Desk is for front desk staff only. Use your Health Harbor email and password.



1. Open Front Desk in your browser. If you aren't signed in, you always land on this page.
2. Enter your **Email** and **Password**, then choose **Sign in**.
3. You arrive on **Today**. Your name and your clinic show in the header.

Front Desk works out your clinic and your inboxes from your front desk role. You only ever see your own clinic's appointments, patients, check-ins and messages.

If you can't get in

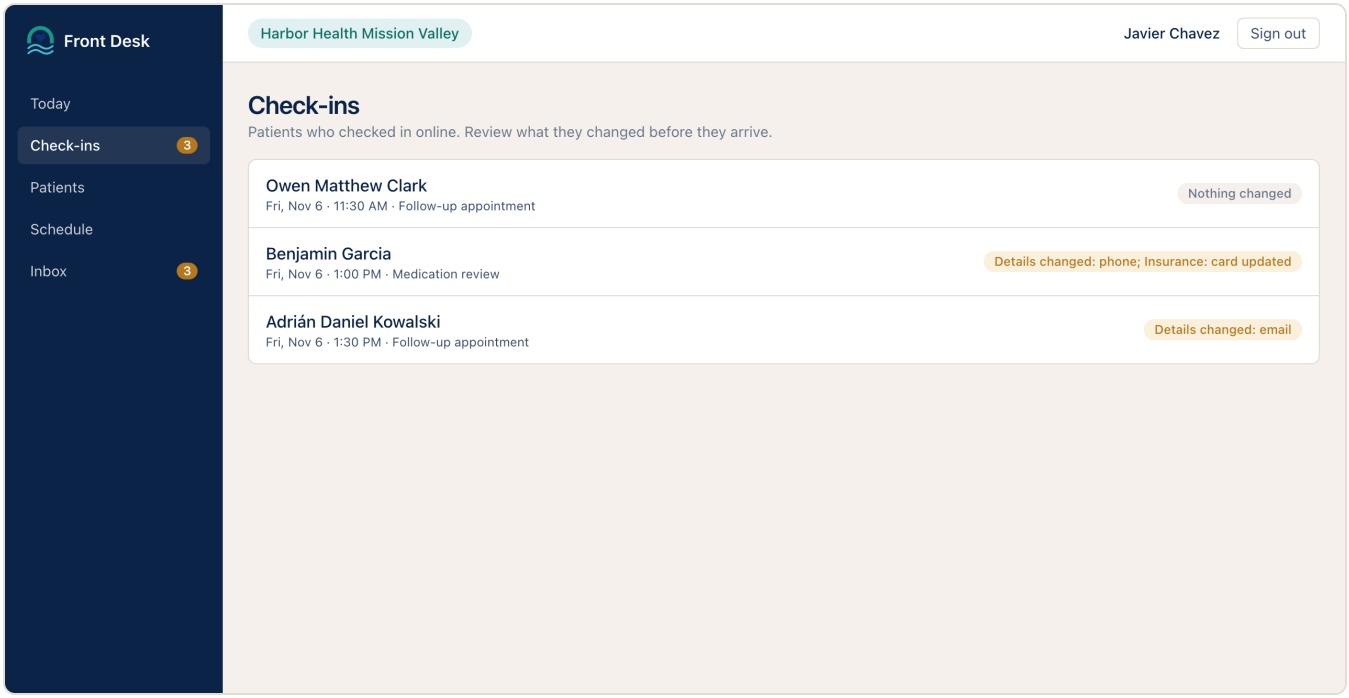
YOU SEE	WHAT IT MEANS
Email or password is incorrect	Check for typos and Caps Lock, then try again.
This app is for front desk staff	The account isn't a front desk account (for example, a doctor's or a patient's login). Ask your manager if you think your role is wrong.

Signing out

Choose **Sign out** at the top right. Always sign out before you leave a shared workstation.

2. Finding your way around

Every page has the same frame: the menu on the left, your clinic and name across the top.



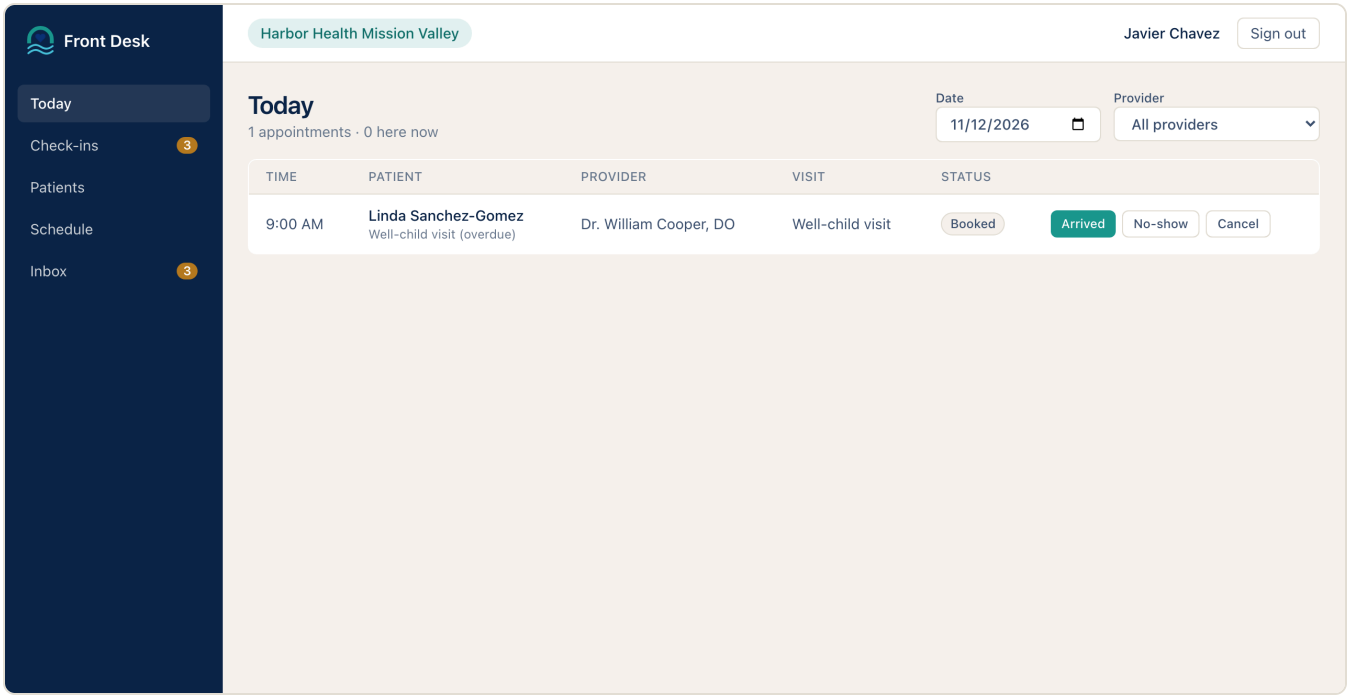
MENU ITEM	USE IT TO
Today	See the day's appointments and move patients through arrival, rooming and no-show.
Check-ins	Review what patients changed when they checked in online.
Patients	Find a patient, register a walk-in, update details and insurance, book visits.
Schedule	Work patients' requests to move a visit.
Inbox	Read and answer messages to the clinic's Scheduling and Records inboxes.

The orange numbers next to **Check-ins** and **Inbox** show how much is waiting for you. Practice managers and IT admins also see **Records**: a read-only view of the practice's records, with search, every field and each record's version history.

> **Live updates.** You don't need to reload. When a patient checks in or sends a message from the portal, or the other desk arrives a patient, Front Desk updates by itself. If the connection drops you'll see *Live updates paused*. It catches up on its own when the connection comes back.

3. Today: running the day

Today is the clinic's day board: who is coming, who is here, who is in a room, and who didn't come.



The day board. The count at the top shows the day's appointments and how many patients are here now.

- Appointments are listed in time order with the patient, the reason for the visit, the provider, the visit type and the status.
- Use **Date** to look at another day and **Provider** to show only one provider's patients.
- Patients who checked in online have a **Checked in online** badge.

Moving a patient through the visit

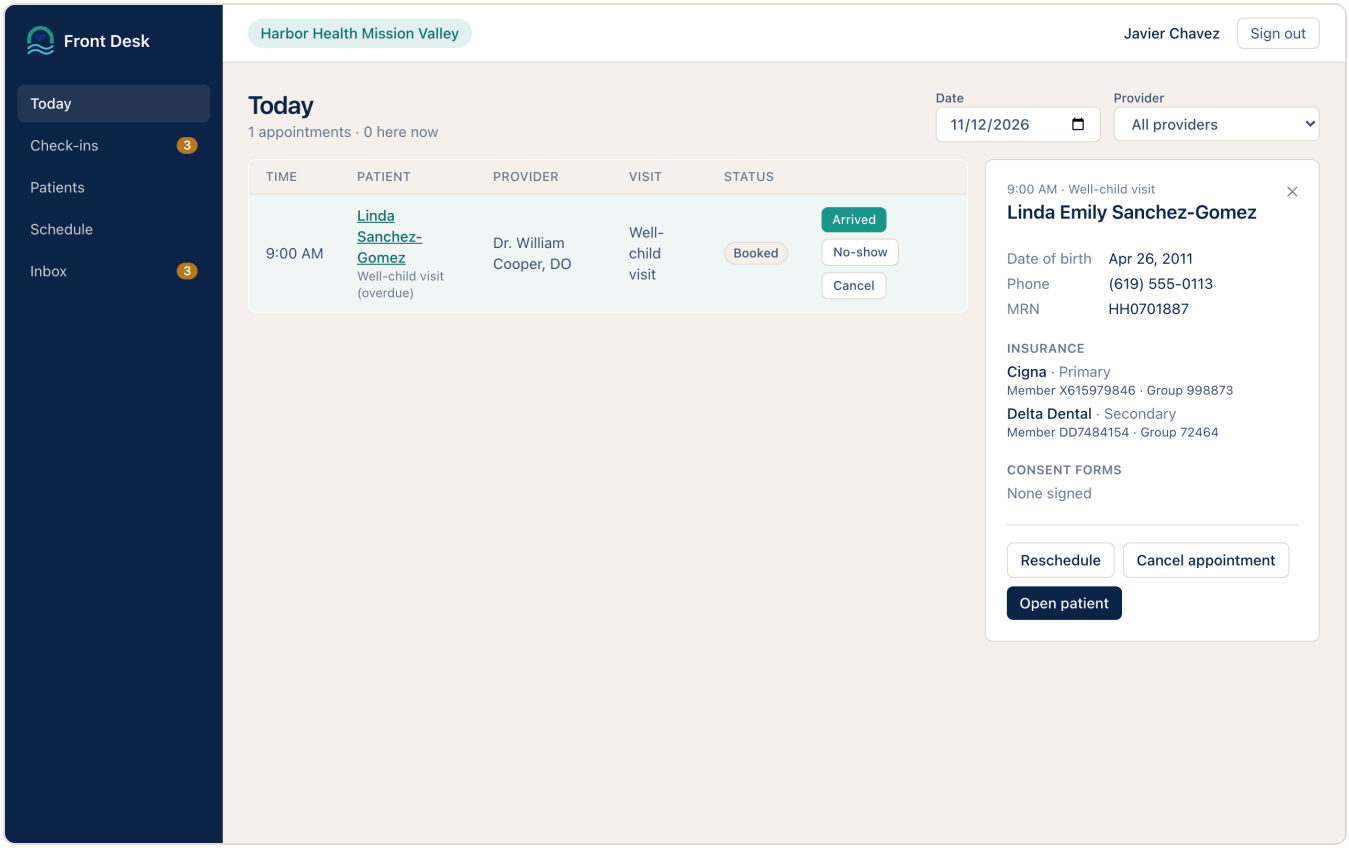
The buttons on each row change with the appointment's status, so you're only offered the steps that make sense.

STATUS	BUTTONS	WHAT THEY DO
Booked	Arrived · No-show · Cancel	**Arrived** checks the patient in and opens their visit. **No-show** records that they didn't come. **Cancel** asks for a reason before it cancels.
Arrived	Room · Undo arrival	**Room**: choose an exam room and the status becomes **In room · Exam Room 2**. **Undo arrival** sets it back to Booked if you arrived the wrong patient.
Seen **No-show** **Cancelled**	none	The visit is finished, so there's nothing more to do from the board.

> **Tip.** Cancelling needs a reason, such as *Patient request*. If you skip it you'll see *Choose a reason*.

4. Appointment details

Click a patient's name on Today to see what the desk needs at a glance, without leaving the board.



The details panel opens on the right.

The panel shows:

- the patient's date of birth, phone and MRN (medical record number)
- the insurance on file, primary first (or *No insurance on file*)
- the consent forms they've signed, and when

From the panel you can **Reschedule** or **Cancel appointment**, jump to **Check-in review** if they checked in online, or choose **Open patient** to go to their patient page. Close it with the **×**.

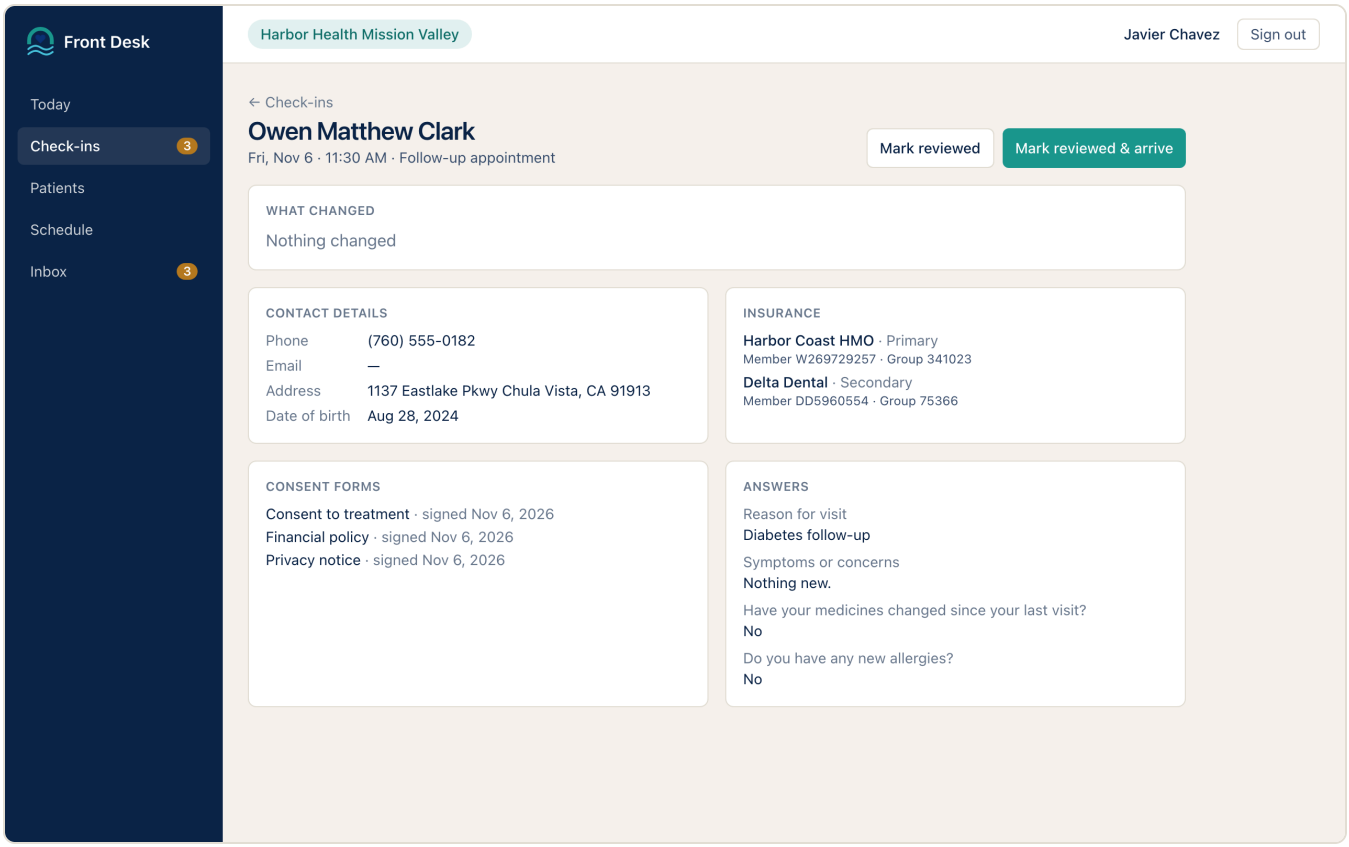
5. Reviewing online check-ins

Patients can check in online before their visit. Review what they told you before they reach the window.

The queue

Open **Check-ins**. Each check-in waiting for review shows the patient, the visit time and a summary of what changed. For example: **Details changed: phone; Insurance: card updated** or **Nothing changed**. When nothing is waiting you'll see *No check-ins to review*.

A check-in

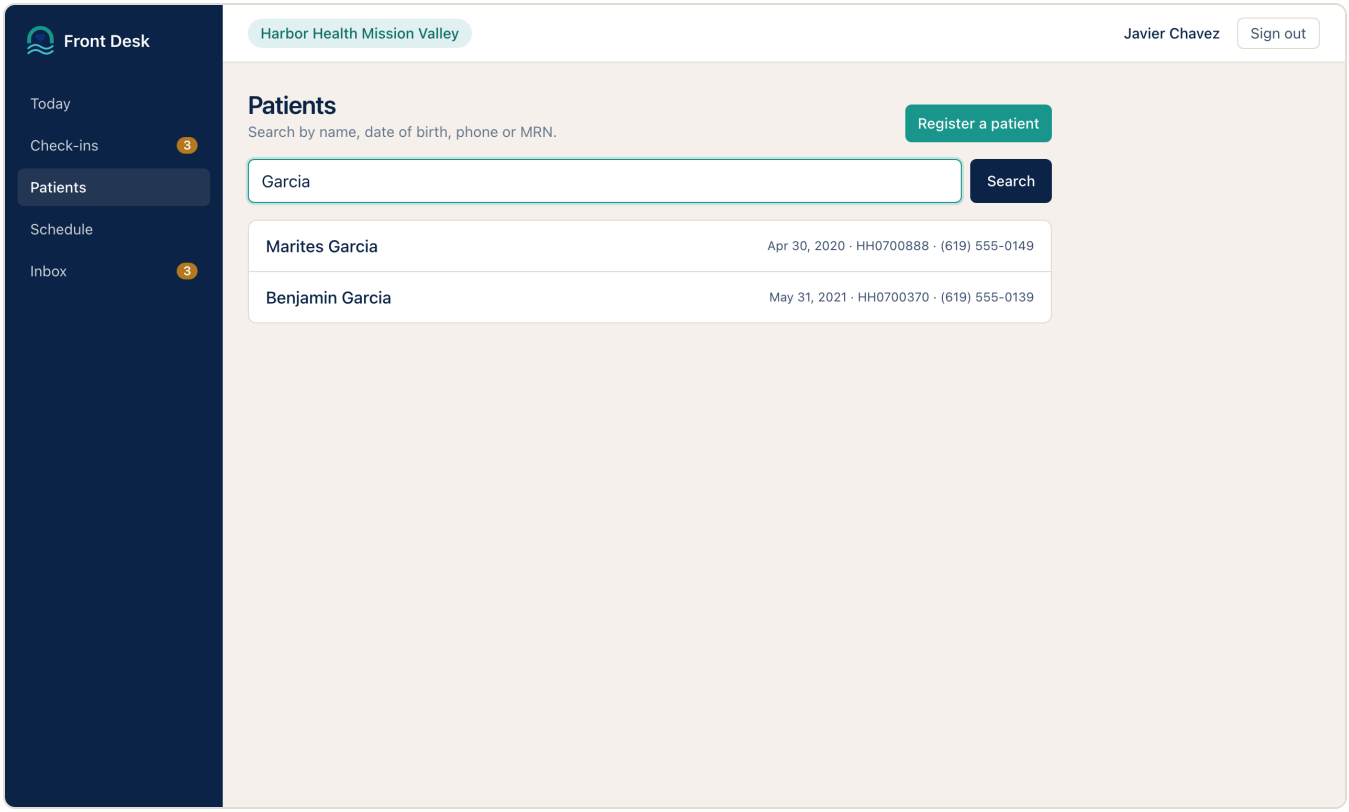


Click a check-in to see what the patient sent: what changed, their current contact details and insurance, any insurance card photos, the consent forms they signed, and their answers to the check-in questions.

- **Mark reviewed**: you've checked it and the patient isn't here yet. The check-in leaves the queue and the appointment stays Booked.
- **Mark reviewed & arrive**: the patient is at the window. This signs off the check-in and marks them Arrived on Today in one step.

6. Finding patients

Search by last name, date of birth, phone number or MRN.

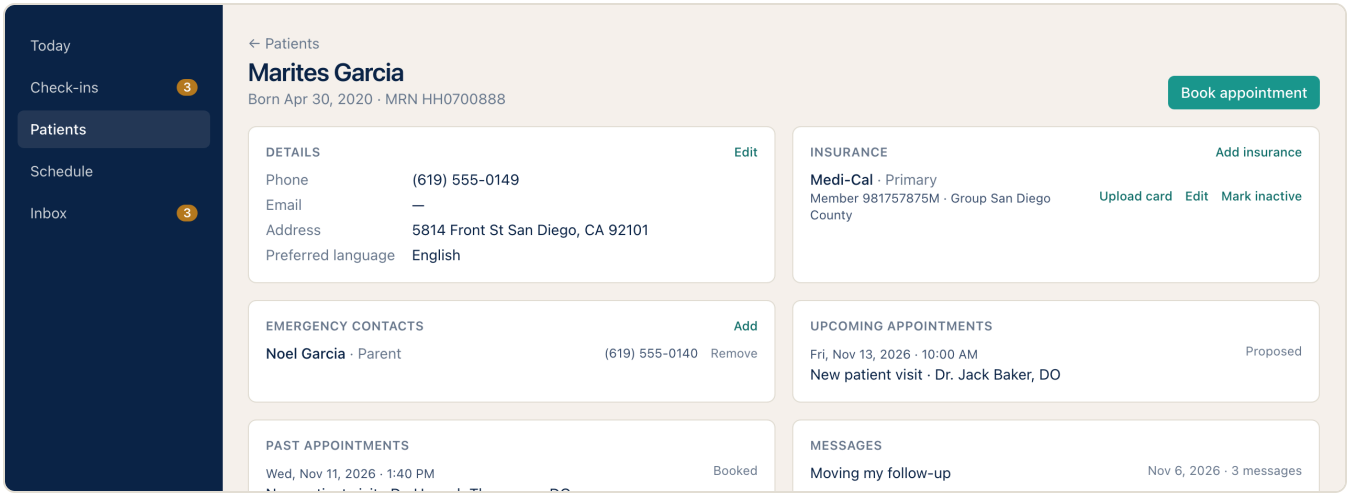


1. Open **Patients**.
2. Type into the search box, for example *Stewart*, *3/9/1984*, *(619) 555-0101* or *HH0701591*, and press Enter or choose **Search**.
3. Click a patient to open their page.

Only your clinic's patients are found. If you get *No patients found*, try another detail (a birth date instead of a name, say) before you register someone new.

7. The patient page and insurance

Everything the desk keeps for a patient, on one page.



The page shows the patient's details and preferred language, emergency contacts, insurance, upcoming and past appointments, and their messages to the desk. Use **Book appointment** at the top right to book a visit (section 9).

Updating contact details and language

Choose **Edit** in Details, change the phone, email, address or preferred language, and save. Invalid entries are flagged: *Enter a valid email*, *Enter a valid phone number*. **Cancel** leaves everything as it was.

Emergency contacts

Choose **Add** in Emergency contacts and enter the contact's name, their relationship to the patient and a phone number. **Remove** takes a contact off.

Insurance

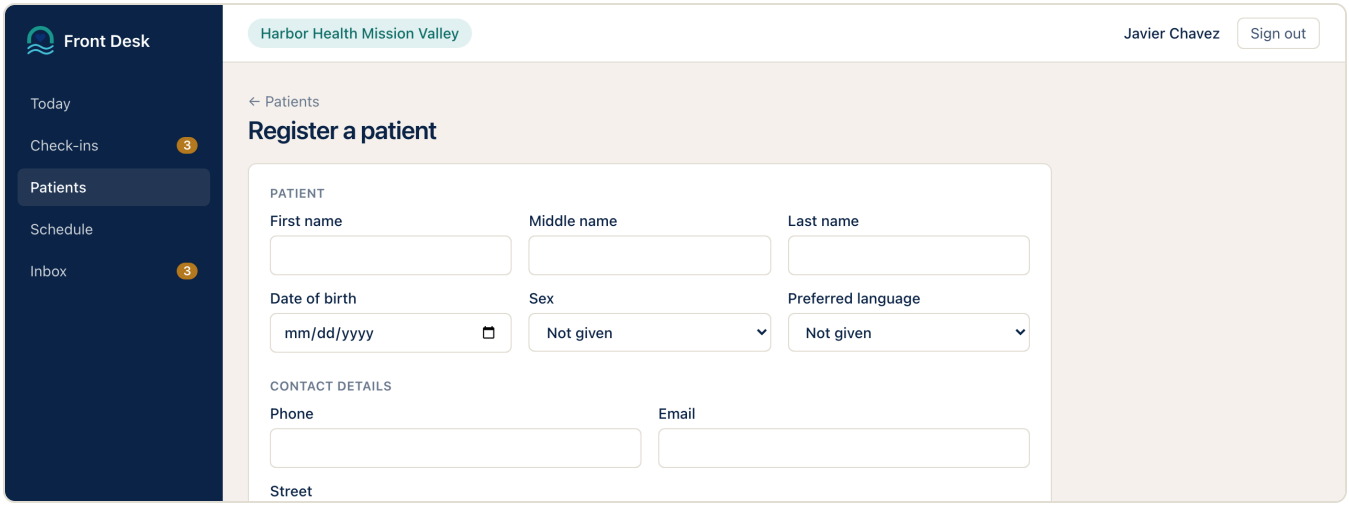
- **Add insurance**: enter the insurance company, member ID and group, whether it's primary or secondary, and the patient's relationship to the subscriber. Company and member ID are required.
- **Edit**: correct the member ID or other details.
- **Mark inactive**: for insurance that has ended. It moves to *Past insurance*.
- **Upload card**: scan or photograph the front and back of the card. Photos (JPG, PNG, HEIC) and PDFs up to 10 MB are accepted. A new card replaces the old one on the page, and the old card is kept on file.

Possible duplicate charts

If another chart looks like the same person, the page says *This may be the same person as…* with the other chart's name and MRN. Send the pair to Records to merge, with a note, or choose **Not the same person** to clear the warning on both charts. Once sent, both charts show *Sent to Records for review*.

8. Registering a walk-in

Always search first. Register only when you're sure the patient isn't already in the system.



1. On **Patients**, choose **Register a patient**.
2. **Patient:** first name, last name and date of birth (all required), plus middle name, sex and preferred language if you have them.
3. **Contact details:** phone, email and address.
4. **Emergency contact:** name, relationship to the patient and contact number.
5. **Insurance:** the insurance company, member ID and group, and whether the patient is the subscriber or a dependent. If you enter insurance, the member ID is required. Leave the section empty if there's none to add yet; you can add it later from the patient page.
6. Choose **Register patient**. The patient and their insurance are saved together, and you go straight to the new patient's page. The patient gets an MRN and belongs to your clinic.

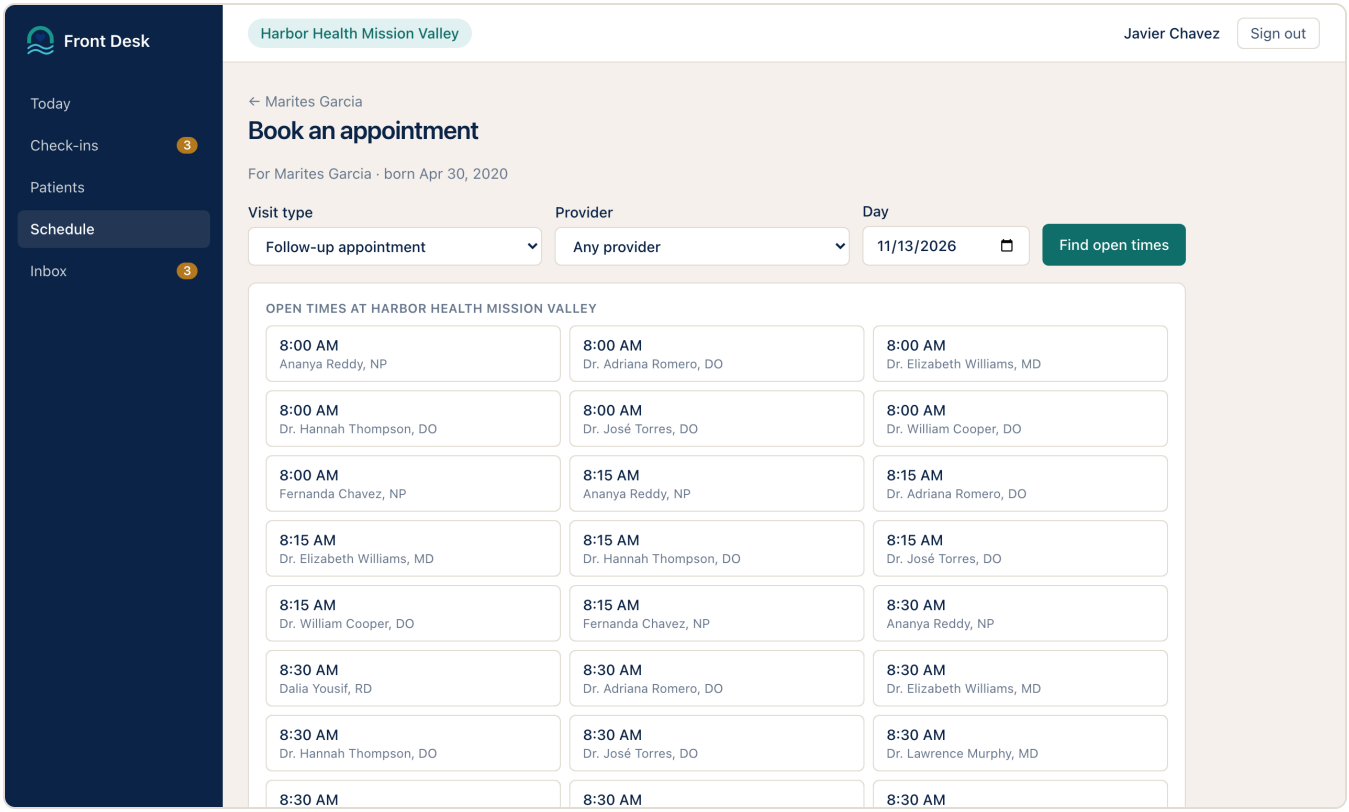
Possible matches

Before it saves, Front Desk looks for people who are probably already patients. It checks the same name and birth date, nicknames and typos with the same birth date, and the same phone or email.

- If it's the same person, open the existing patient instead. No new chart is created.
- If it really is someone new (a family member sharing a phone number, for example), choose **Register as a new patient**.

9. Booking an appointment

You book from the patient, so the visit is always for the right person.



1. Open the patient and choose **Book appointment**.
2. Choose the **Visit type**. Leave **Provider** on *Any provider*, or pick one to see only their times.
3. Pick the **Day** and choose **Find open times**.
4. Click an open time to book it.

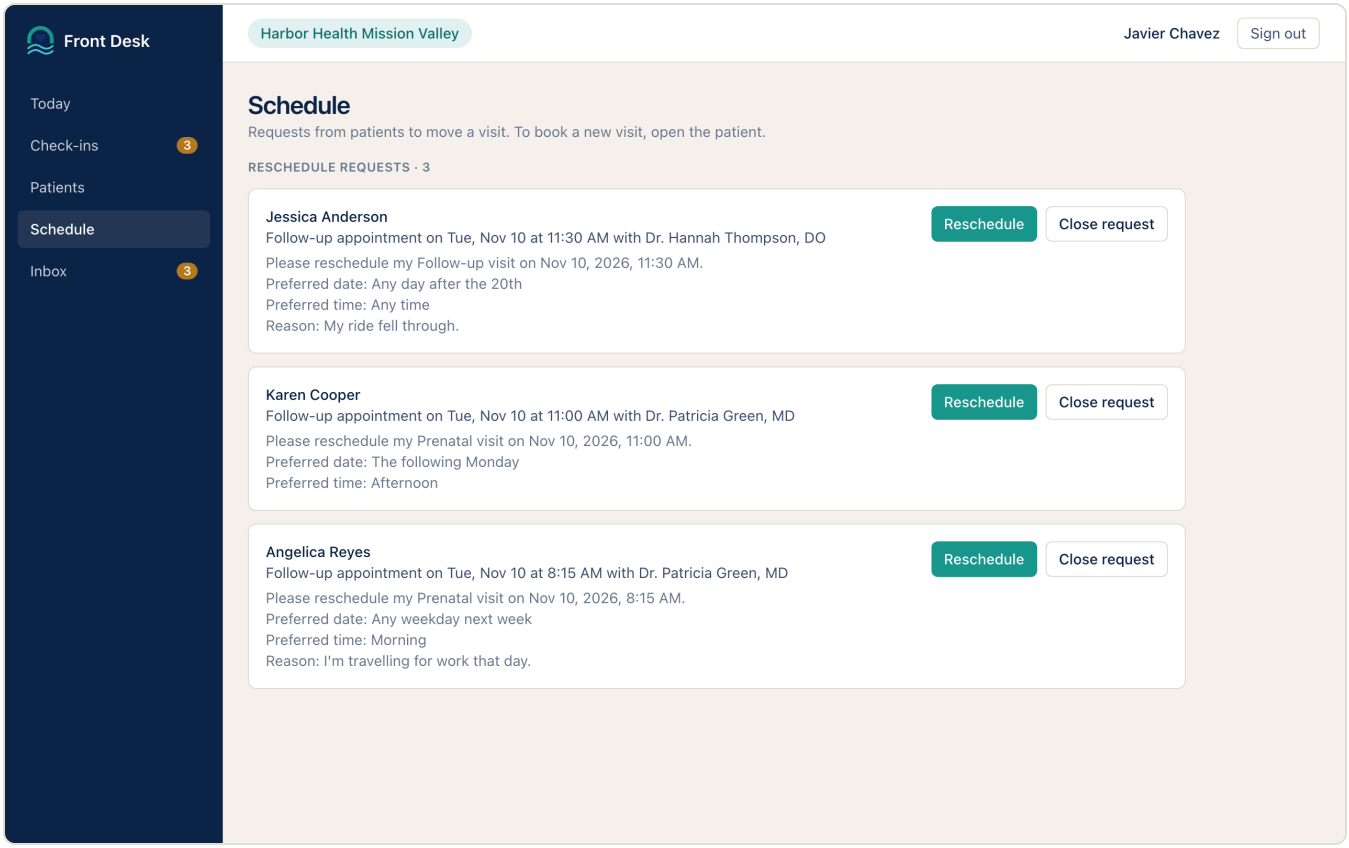
If there's nothing that day you'll see *No open times this day*. Try another day. If someone else books the time while you're looking, you'll see *That time was just taken* and the list refreshes.

Rescheduling and cancelling

Open an appointment (on Today, click the patient's name) and choose **Reschedule** to pick a new time. The new appointment is booked and the old one is cancelled as *Rescheduled*. If you close the picker without choosing a time, nothing changes. **Cancel appointment** asks for a reason.

10. Reschedule requests

Patients can ask to move a visit from the portal. Their requests wait for you under Schedule.

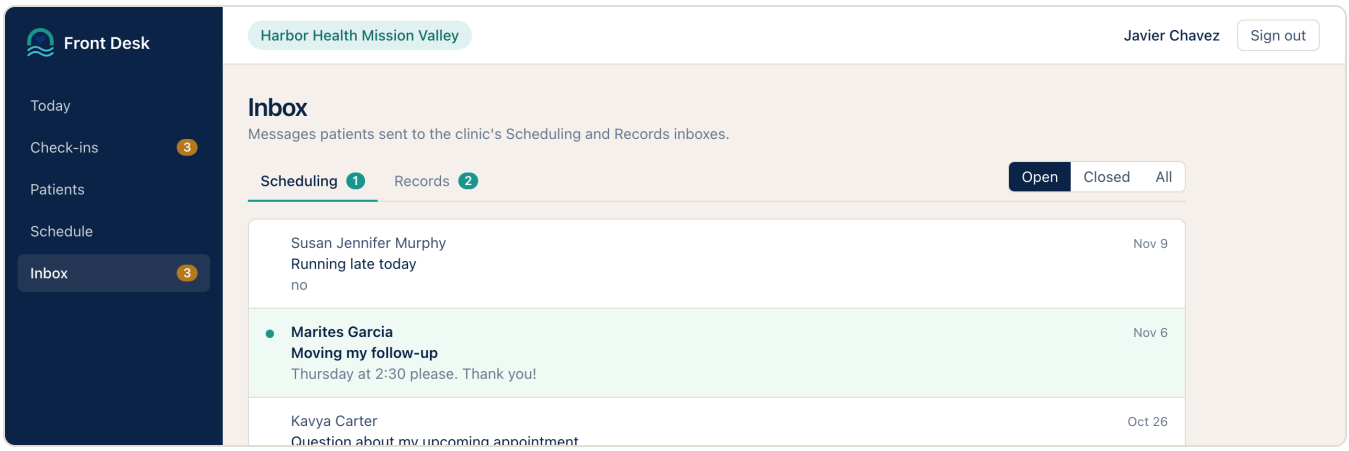


Each request shows the patient, the appointment they want to move, and their note: the preferred day and time, and often a reason.

- **Reschedule** opens the time picker for that appointment. When you pick a new time, the old appointment is cancelled, the request is closed, and the patient gets a message with the new time.
- **Close request**: use this when you're keeping the time (after phoning the patient, for example). Add a **Note to the patient**. They receive it as a message and the appointment doesn't change.

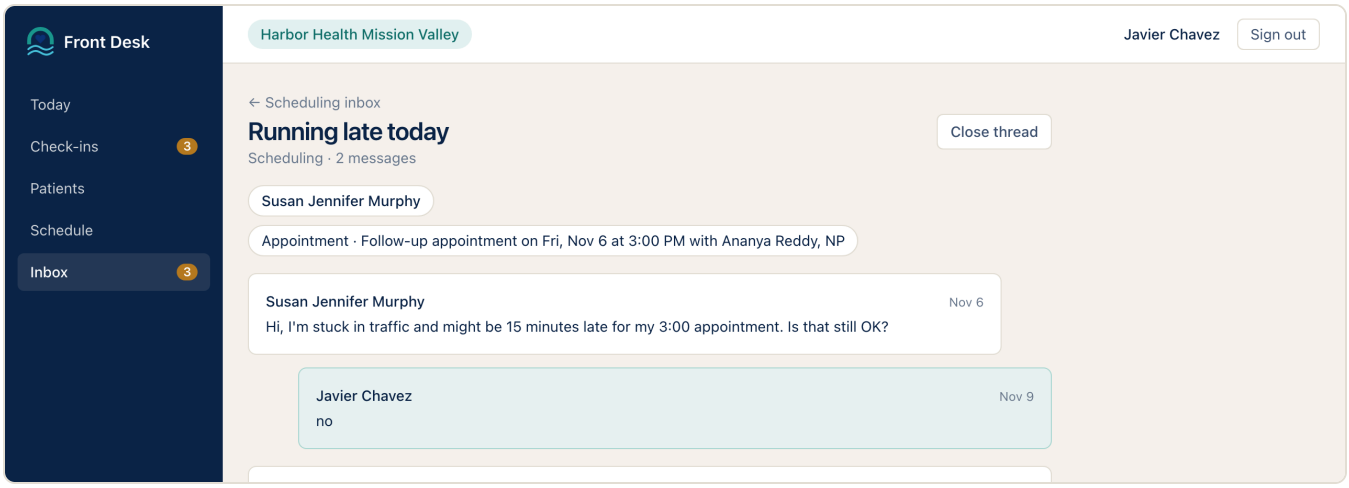
11. The inbox

Messages patients send to the clinic's Scheduling and Records inboxes. Messages to a doctor's team don't come here.



- Switch between the **Scheduling** and **Records** tabs. Each shows its unread count.
- Unread conversations are bold with a teal dot, newest first.
- Use **Open**, **Closed** and **All** to filter.

Reading and replying



Opening a conversation marks it read. You see every message, oldest first, with links to the patient and to the appointment it's about.

- Type in **Reply** and choose **Send**. The patient sees your reply in the portal. If a parent or caregiver wrote in about a child, the reply goes to them.
- **Attach files** to send forms, letters or directions: up to 3 photos or PDFs, 10 MB each. You can send a file without any text.
- **Close thread** when the conversation is done. If the patient writes again, it reopens by itself.

12. Messages you may see

What Front Desk is telling you, and what to do about it.

MESSAGE	WHAT TO DO
Email or password is incorrect	Re-enter your sign-in details.
This app is for front desk staff	The login isn't a front desk account. Contact your manager.
Live updates paused	The connection dropped. Keep working; it catches up when the connection returns.
Choose a reason	Pick a cancellation reason before you cancel.
No patients found	Search by another detail before you register someone new.
Enter a first name / last name / date of birth	These are required to register a patient.
Date of birth can't be in the future	Check the birth date.
A patient with this name and birth date already exists	Open the existing patient instead of creating a second chart.
Enter a valid email / phone number	Correct the contact details.
Enter the insurance company / member ID	Both are required for insurance.
Upload a photo (JPG, PNG, HEIC) or a PDF	Card images must be photos or PDFs.
Files must be 10 MB or smaller	Retake the photo at a lower resolution or scan to PDF.
Couldn't save the card. Try again.	Your chosen files are still selected. Choose upload again.
No open times this day	Try another day or any provider.
That time was just taken	Someone else booked it. Pick from the refreshed list.
Write a message	A reply needs text or an attachment.
Attach up to 3 files / Attach a photo or a PDF	Remove extra files or use a supported type.