



IntelliSite Instructions

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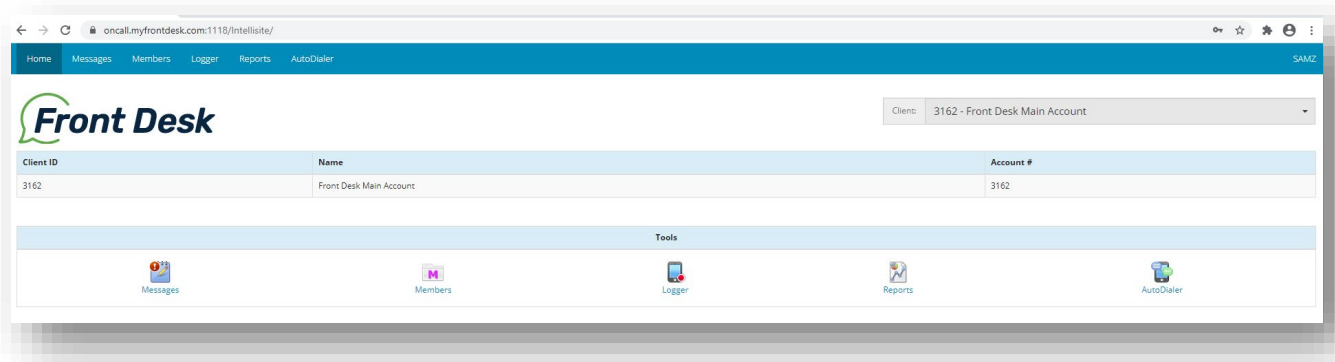
Getting Started:

1. Go to <https://oncall.myfrontdesk.com:1118/intellisite>
(Please Note: Our site are protected by 256-bit SSL encryption that enforces 2048-bit CSR encryption to meet HIPAA Security Rule Compliance standards)
2. Enter your login (case sensitive) provided by Front Desk
3. Enter your password (case sensitive) provided by Front Desk



The image shows a login form for IntelliSite. At the top is the STARTEL logo, which consists of a blue starburst graphic above the word "STARTEL" in bold black letters. Below the logo is the text "IntelliSite Login" in red. There are two input fields: "Username:" and "Password:". Below the password field is a "Login" button with a green checkmark icon.

4. You may now access: [On-Call](#) (schedules), [Messages](#), [Members](#) (for on-call), [Directories](#) (if applicable), [Logger](#) (for voice recordings) and [Reports](#), depending on your account settings.

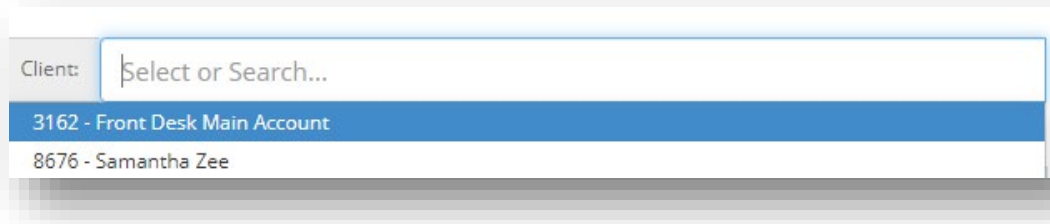


The image is a screenshot of the Front Desk dashboard. The browser address bar shows "oncall.myfrontdesk.com:1118/intellisite/". The dashboard has a blue header with navigation links: Home, Messages, Members, Logger, Reports, and AutoDialer. The "Front Desk" logo is on the left, and a client dropdown menu on the right shows "Client: 3162 - Front Desk Main Account". Below the header is a table with columns "Client ID", "Name", and "Account #". The table contains one row with Client ID 3162, Name "Front Desk Main Account", and Account # 3162. At the bottom is a "Tools" section with icons for Messages, Members, Logger, Reports, and AutoDialer.

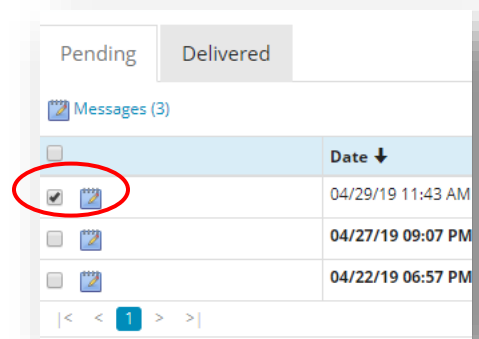
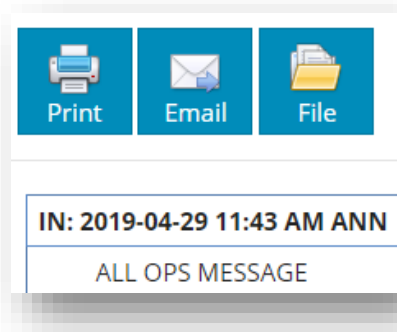
Client ID	Name	Account #
3162	Front Desk Main Account	3162

Messages:

- Select the “Messages” icon or the menu on the top bar to see pending or delivered messages. (A Red exclamation point indicates unread messages.)
- If you have access to multiple sites, select the site you need in the upper right-hand corner drop-down menu.



- Select the “Pending” tab for new messages, or the “Delivered” tab for messages already filed.
 - a. To view the message, double click on the notepad icon (or you can preview it in the bottom panel of your screen if you click it once or check the box next to it.)
 - i. You may print, forward, and file the message.

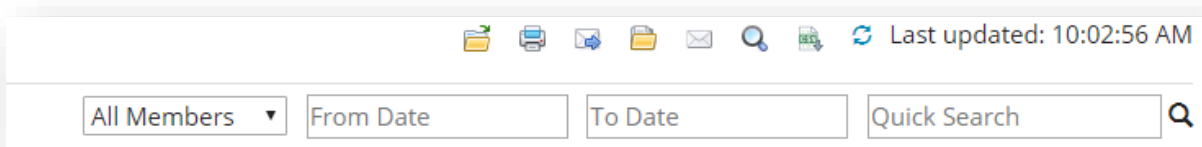


- ii. Do not forward/email messages if the message contains any Protected Health Information (including if the message contains only patient name and phone number). Email forwarding from the IntelliSite is not encrypted.
This feature may be removed at client request.
- iii. File the message to send it to “Delivered Messages” (Please Note: Once a message is delivered, you cannot move it back to pending, but you can view it in “Delivered Messages”).

(IMPORTANT) Once a message has been read you must **file it** or the answering service staff will continue to try to reach you. All filed messages may be viewed again by clicking on the delivered icon.

- iv. You may perform batch operations by selecting the check boxes next to the desired

messages, and then utilizing the icons to the right above the messages.



Hover over the icons to see descriptions of the actions (View Messages, Print, Forward, File, Make Unread, Advanced Search (allows content search) and Export to .csv).

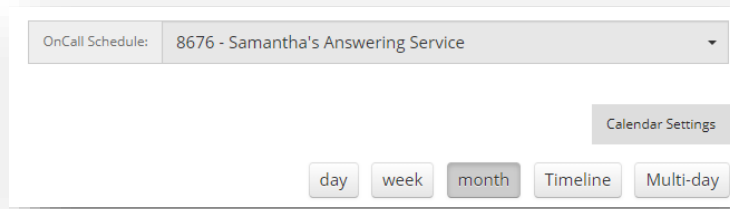
You may also search for messages for specific members or dates in the same area.

- You can view and print delivered messages in the same way under the “Delivered” menu.
- The IntelliSite updates every 30 seconds, you can manually update it by clicking “refresh” located to the right of the search bar.
- When you are finished with your session **YOU MUST SIGN OUT.** Simply closing the webpage tab does not sign you out of the session. Failing to do so leaves Protected Health Information unprotected.

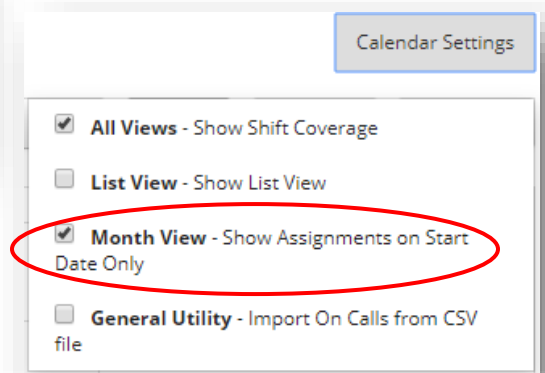


On-Call:

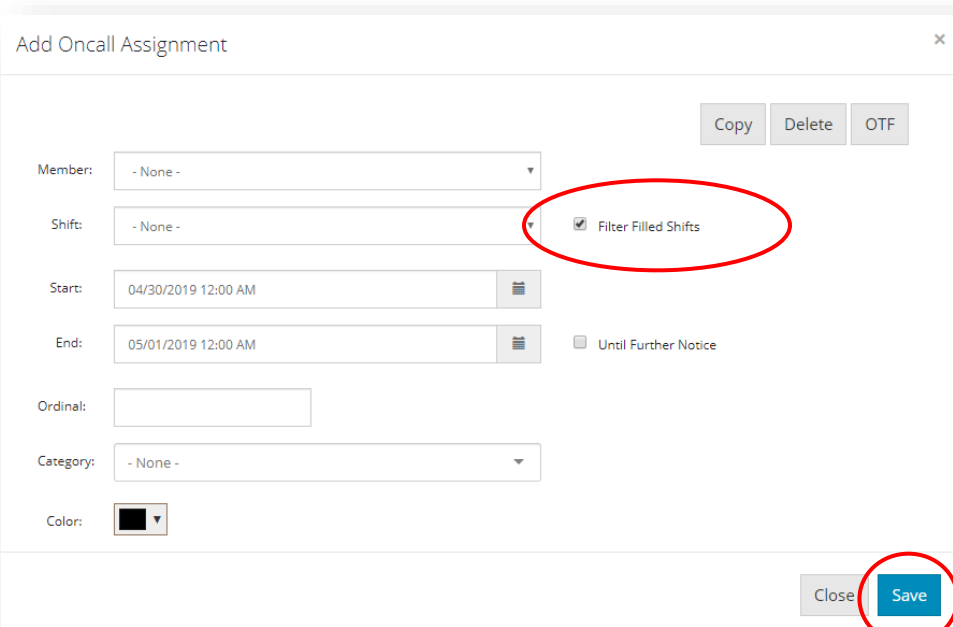
Entering on-call schedules for clients with only one schedule:



- You may view the on-call calendar multiple ways. On the upper right-hand corner of the calendar, there are options for day, week, month, or multi-day. It will default to monthly view but change it to meet your needs.



- Go to Calendar settings. This is right above the calendar on the right-hand side. Click on "Show Assignments on Start Date Only". This will make the calendar easier to read.



- To add a member to the on-call schedule, begin by clicking on the date the member begins their shift.
 - A pop-up box will open that allows you to select the member and the shift they are working. If

they are on-call for multiple days in a row, you can select a start date and an end date, allowing you to place them on-call for several days at a time. Otherwise, it will default to the amount of time the shift you chose is scheduled for.

- If you have an odd shift for a given day that is not programmed in to your account, you may just enter the start date and time and ignore entering a shift. For instance, if Dr. Smith is

normally on-call from 8:00am-8:00pm, but there is another doctor covering from 12:00pm-2:00pm, you can enter Dr. Smith from 8:00am-12:00pm, then the covering doctor from 12:00pm-2:00pm, and then Dr. Smith again for the remainder of the coverage period.

- There is also an option on this page to 'filter filled shifts.' You can toggle this on and off by checking the box. Filtering is a great tool if you have multiple people on-call for each day and you want to ensure you put the correct people in the correct shifts. For instance, if you have an AM and a PM person on-call, you can filter the filled shifts so that once one shift is filled it will no longer show up as an option for that day. As an example, assume you have entered Dr. Smith as the AM on-call for a given day. Now when you select the next person to be on-call, the AM shift option will not show up, just the PM shift option. This can help you ensure you do not accidentally place multiple members on the same shift unnecessarily.
- The Ordinal box can be used if you have multiple members on-call at the same time and you want one member to show up above other members. If you set the ordinal as '1' for the first member and '2' for the second member, the first member will show up above the second, and so on.
- If you have multiple categories for on-call (e.g. 'main on-call' and 'back up'), the category box on the bottom of this screen will allow you to designate which category the member you have entered belongs to. If you do not need to use a category selection, leave none in the box. You may also color coordinate by category or by provider.
- When you are done entering the person on-call, click 'save'. You may then move on to the next day you need to enter on-call for and follow the same procedure as above.
- If you need to delete an on-call entry, click on the saved entry on the calendar. A red box with an 'X' in it will appear in the upper right-hand corner of the box. You can just click this box and it will confirm you want to delete this entry.
- To edit an on-call (i.e., change it from one member to another), double click the entry on the on-call schedule and it will bring up the same interface it does when you enter the on-call member. You may then edit it and save when finished.

Entering on-call schedules for clients with multiple schedules:

- You can toggle between the schedules you are entering by clicking the box underneath the heading that states your account name. All of the accounts assigned to you will drop down in this box.
- Select the on-call schedule you would like to enter or edit.
- You may then follow the above procedure for entering, deleting, or editing your on-call schedule.

Members:



- Click on the “Members” icon or menu from the top blue bar.
- Click on the “Edit Member” icon to make changes.



- On the pop-up box you may now select the top tabs to update General Info, Instructions, Address(es), Phone(s), Pager(s), Email(s), Faxe(es), SMS(s), SMP(s)

Edit Member ... Required fields are marked with ★

Samantha Zee

General Instructions OnCall Info Address(es) Phone(s) Alpha Pager(s) Digital Pager(s) Email(s) Fax(es) SMS(s) SMP(s)

On Call

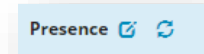
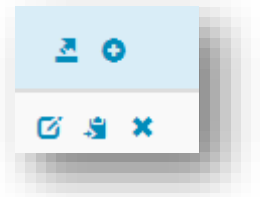
Name: ★ Samantha Zee

Unique ID:

Category: -- None --

Close Save

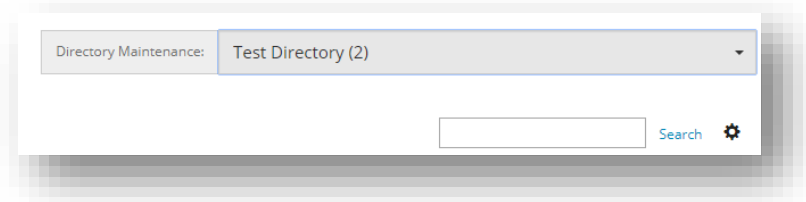
- If you make changes, be sure to click “Save”. If you are unsure about the way a contact is set up, please contact us.
- Add a new member by clicking on the “Plus” icon above the existing members
- The dotted arrow to the left of the plus will export the list to an .html file.
- The “Presence” Menu can be custom programmed at client request. Members can update their presence on their apps and it will sync with the website. The presence can also be updated online.



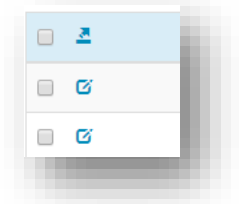


Directories:

- Click on the “Directories” icon or select from the menu on the top blue bar.
- You may have more than one directory in the upper right-hand selection.



- You may search directories or click the gear icon next to “Search” for advanced search options
- You may edit an entry using the pad and pencil icon, or export selected entries to .csv or .html files with the dotted arrow icon.



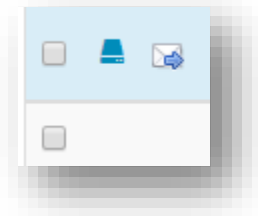


Logger:

- Click on the “Logger” icon or select from the menu on the top blue bar.
- If you have more than one site, select the correct site in the upper right-hand corner.

The screenshot shows a search interface for recordings. It features a dark sidebar on the left with search criteria: 'From:' (04/30/2019 12:00 AM), 'To:' (04/30/2019 12:36 PM), 'Duration:' (input field), 'Agent ID:', 'ANI/Dialed:', and 'Type:' (All). A 'Search Recordings' button is on the right, and 'Cancel' and 'Search' buttons are at the bottom.

- Click “Search Recordings” and enter date or other desired parameters. Click “Search” to execute.
- Click the “Play” icon to hear the recording.
- Click on the blue hard drive icon to download and save the recording, or the envelope with a blue arrow to email the recording. Save or email multiple recordings by checking the boxes to the left of the recording.



Please Note: Do not email recordings that contain any Protected Health Information (including if the message contains only patient name and phone number). Email forwarding from the IntelliSite is not encrypted. This feature may be removed at client request.

Reports:

Client Settings

- Click on the “Reports” icon or the menu selection on the top blue bar.
- From the “Client Settings” tab click “Run Report” on the right side.
- Click on the white arrow in the black circle next to the client ID on the left to open the report. You may also export the report to a .html file by clicking on the dotted blue arrow with “Export” above the client ID.



Client ID	Name
3162	Business Extension Service Main Account

Please Note: This report is for informational purposes. It contains the instructions our operators use to handle your calls. Please contact us if we need to make changes to the instructions.

In Call Summary

- Click on the “Reports” icon or the menu selection on the top blue bar.
- From the “In Call Summary” tab select your desired report date.
- Click “Run Report” on the right side.
- You may export the report to a .csv or .html file by clicking on the blue dotted arrow.

Time	Calls In	Calls Answered		Percent Answered			Avg Delay	Abandoned Calls						Hold Calls		Avg Hold
		#	%	PAA	Oth	Agt		PAA		Oth		Agt		Avg Wait	#	
								#	%	#	%	#	%			

Call Detail

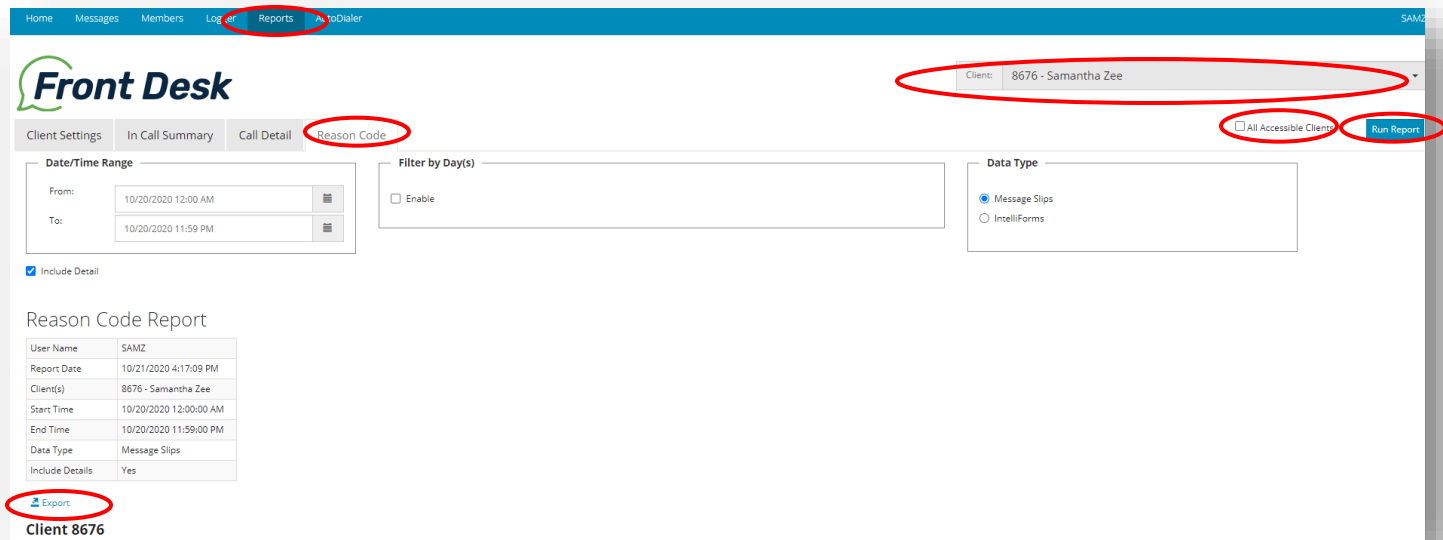
- Click on the “Reports” icon or the menu selection on the top blue bar.

- From the “Call Detail” tab select your desired date range, call types, and filter options.
- Click “Run Report” on the right side.
- You may export the report to a .csv or .html file by clicking on the blue dotted arrow.

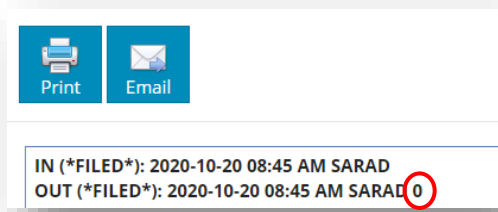
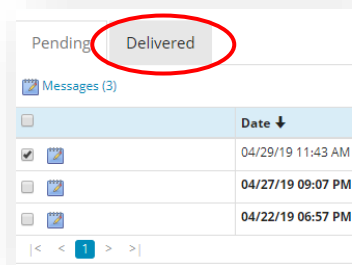
Reason Codes:

Note: Reason code reporting relies on prior configuration. These are customizable menus that our representative will select at the end of the call. Codes may reflect answers to a marketing question, allow tracking for multiple escalations, or other pre-designed purposes.

- Click on the “Reports” icon or the menu selection on the top blue bar.
- From the “Reason Code” tab select your desired report date or range.
- Leave the ‘Include Detail’ box checked for a break-out by day.
- Check “All Accessible” if you want to see all reports for all lines connected to your account, or select a specific client from the drop-down menu in the upper right-hand corner.
- Click “Run Report” on the right side.
- You may export the report to a .csv or .html file by clicking on the blue dotted arrow.

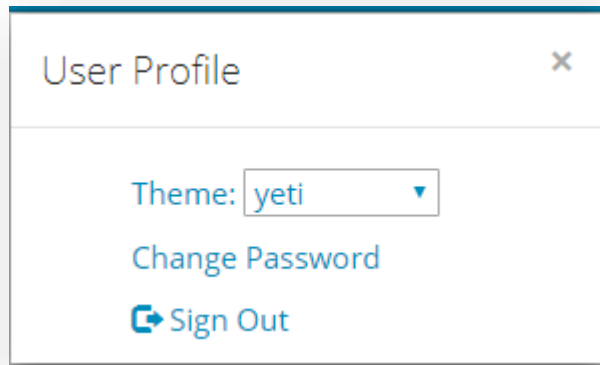


- Details will allow you to see the date/time of the message slip for the reason code.
- For the complete message, click on the Messages link at the top.
- Click on the “Delivered” tab.
- Click on the memo pad to open a message slip.
- The reason code will appear on the top of the slip on the “Out” line at the end.



Logging out of the system:

1. You can change your theme, password, and sign out from the sign-on name in the upper right-hand corner.



Glossary of Terms

Pending	These messages still need to be addressed by your company. After reading the message, make sure to <u>file it</u> . If you need to reference the message slip again, it will be available in the “Delivered” message icon below.
Delivered	These messages have already been read, distributed to an on-call provider, or mark the history of a call that a caller has possibly canceled without reaching anyone. Messages are held up to six months prior to the current date for your reference.
File	Move a message from “Pending” to “Delivered”. This is a required action of you for all Pending messages. Failure to “file” a message from pending will result in calls from the answering service checking in to see if you received your phone calls.
Forward / Email	Send a message via email. Do NOT forward any message that contains PHI. The email is unencrypted. Please print message instead.
Theme	Changes the appearance of the IntelliSite.
Sign Out	The last step of your session. Signing out protects all messages to your business from unauthorized users.