

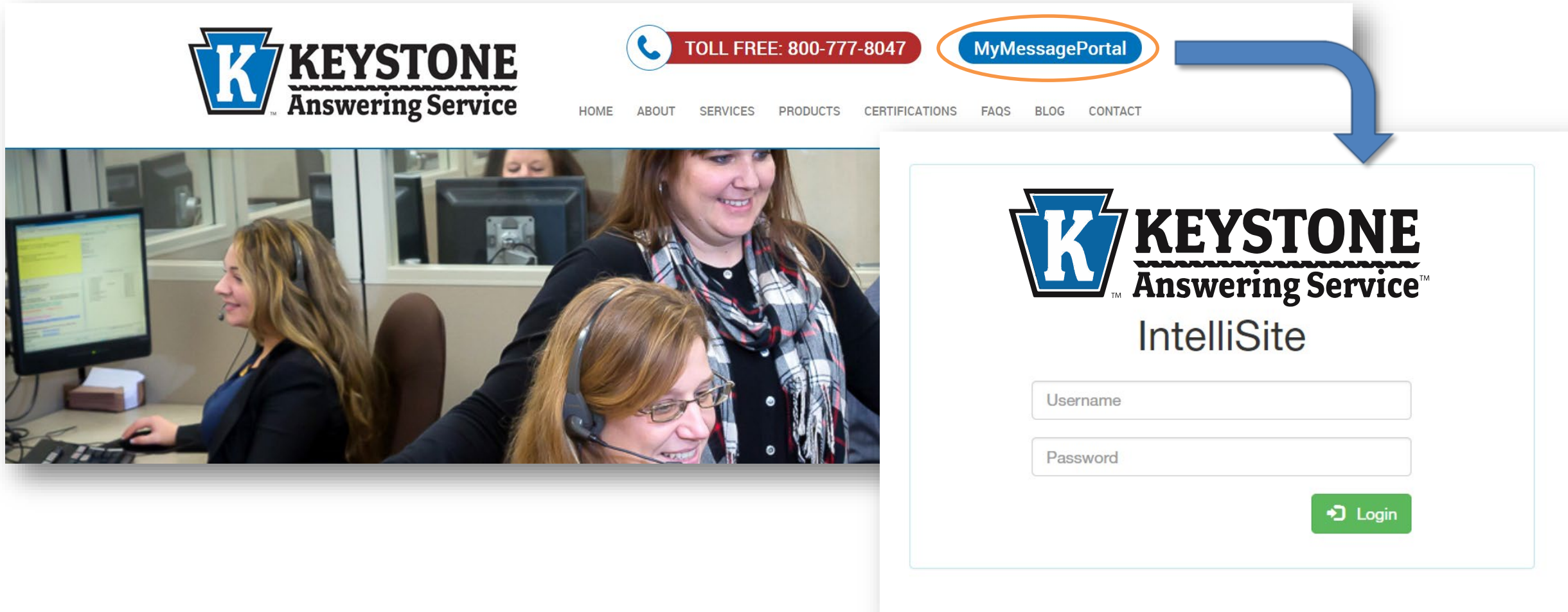
Web Portal Guide

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Logging into the Web Portal

To log into your Web Portal, also known as Intellisite, account, select “My Message Portal” on the very top banner of the Keystone Answering Service Website. You will use the provided Username and Password to enter your account.



The screenshot displays the top section of the Keystone Answering Service website. On the left is the company logo, a blue shield with a white 'K' and the text 'KEYSTONE Answering Service'. To its right is a red button with a white telephone icon and the text 'TOLL FREE: 800-777-8047'. Further right is a blue button with the text 'MyMessagePortal', which is circled in orange. A large blue arrow points from this button to a white login overlay on the right. The overlay features the same company logo, the text 'IntelliSite', and two input fields labeled 'Username' and 'Password'. Below these fields is a green button with a white arrow icon and the text 'Login'. Below the website banner is a photograph of three female call center agents wearing headsets and working at computers.

Web Portal Homepage

From the Web Portal Homepage, you can select the appropriate option by either clicking the icons under the “Tools” section or using the top toolbar.

The screenshot displays the Web Portal Homepage interface. At the top, a blue navigation bar contains the following links: Home, OnCall, Messages, Members, Contact, Directories, TAAs, Logger, and Reports. Below this bar, on the right side, is a client selection dropdown menu labeled "Client:" with the value "904 - Dr. Startel Clinic".

In the center of the page is a table with the following data:

Client ID	Name	Account #
904	Dr. Startel Clinic	904

Below the table is a section titled "Tools" which contains eight icons representing different functions: OnCall, Messages, Members, Contact, Directories, TAAs, Logger, and Reports.

OnCall

To update your schedule using the OnCall calendar:

- Add an “OnCall Assignment”, click the specific day and enter in the member, shift and category.
- Insert the schedule for other team members, select the individual under the “Member” dropdown list.

Member = Oncall Individual

Shift = Programmed Time for which particular OnCall will display

Category = The label that is most appropriate for the individual

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

OnCall Schedule: 904 - Dr. Startel Clinic

Member: AllCategory: AllQuery MemberCalendar Settings

<>todayFebruary 2018dayweekm

Sun	Mon	Tue	Wed	Thu	
28	29	30	31	1 Feb	
				OFFICE_ 2/1 7:30 AM - 2/1 4:59 PM Dr. Denise Rogers 2/1 5:00 PM - Location A	OFFICE_ 2/2 4:59 PM - 2/2 4:59 PM Dr. Gordon Location
4	5	6	7	8	
Dr. Kelly Davis 2/3 7:30 AM - 2/4 7:29 AM - Location A Dr. Kelly Davis 2/4 7:30 AM - 2/5 7:29 AM - Location A	OFFICE_ 2/5 7:30 AM - 2/5 4:59 PM Dr. Denise Rogers 2/6 5:00 PM - 2/7 7:29 AM - Location A	OFFICE_ 2/6 7:30 AM - 2/6 4:59 PM Dr. Denise Rogers 2/6 5:00 PM - 2/7 7:29 AM - Location A	OFFICE_ 2/7 7:30 AM - 2/7 4:59 PM Dr. Denise Rogers 2/8 5:00 PM - Location A	OFFICE_ 2/8 7:30 AM - 2/8 4:59 PM Dr. Denise Rogers 2/8 5:00 PM - Location A	OFFICE_ 2/9 4:59 PM - 2/9 4:59 PM Dr. Denise Rogers 2/9 5:00 PM - 2/9 7:29 AM - Location A
	Dr. Gordon Hill 2/5 5:00 PM - 2/6 7:29 AM - Location A	Dr. Benita Derty 2/7 5:00 PM - 2/8 7:29 AM - Location A	Dr. Denise Rogers 2/8 5:00 PM - Location A		

Add OnCall Assignment

CopyDeleteOTF

Member: - None -

Shift: - None -☒ Filter Filled Shifts

Start: 03/06/2018 12:00 AM

End: 03/07/2018 12:00 AM☐ Until Further Notice

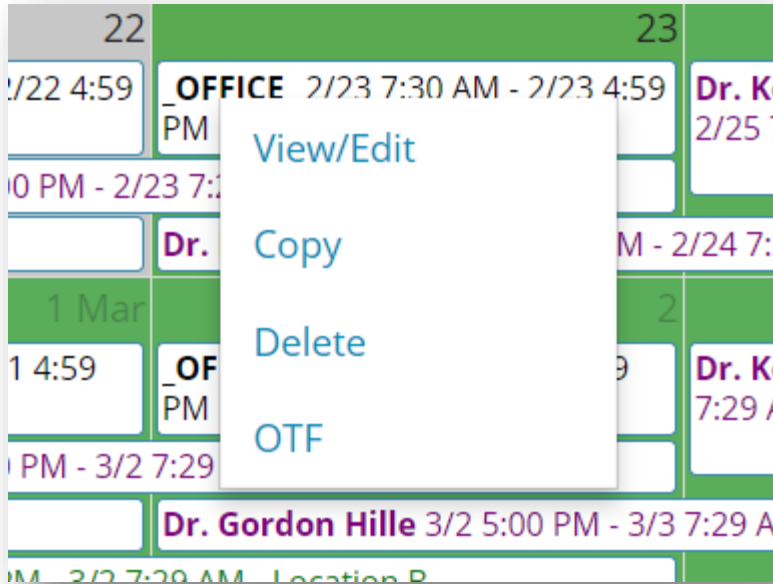
Ordinal:

Category: - None -

Color:

CloseSave

OnCall



- Delete** – Removes the selected OnCall Assignment
- OTF (On the Fly)** – Allows you the option to assign another employee to cover part of the selected OnCall time

- View/Edit** – Allows you to open the assignment you clicked on to make edits
- Copy** – Makes input easier when individuals are OnCall for multiple days

Edit OnCall Assignment - OTF

OnCall Assignment

Member: Dr. Kelly Davis
From: 2/24/2018 7:30 AM
To: 2/25/2018 7:29 AM

On The Fly Assignments

+	Member	From	To
No On The Fly Assignments.			

OTF Details

Member: Dr. Denise Rogers

Start: 02/24/2018 7:30 AM

End: 02/25/2018 4:30 PM

Notes: Dr. Davis will be attending a community health seminar, Dr. Rogers is covering.

Save New

Messages

Have quick access to all your message slips in the “Messages” tab of the Web Portal.

This is your personal database of all your message slips. Instead of searching through your email for a specific message, you can easily search for it here.

Helpful hint: Pending messages are those that we are still working on, while delivered messages are finished messages.

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

PendingDelivered

Date ↑

|< < 1 > >|

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

Client: 904 - Dr. Startel Clinic

PendingDelivered

Messages (10)

All Members02/16/2018 10:32 AM02/24/2018 10:32 AMSearch Messages

Date ↑

Member

Agent

First Prompt

Second Prompt

Delivered By

<div><div></div><div></div></div>	02/23/18 12:26 PM	_OFFICE_	DAR	_OFFICE_	MOCK CALLS	DAR
<div><div></div><div></div></div>	02/23/18 11:18 AM		DAR		MOCK CALLS	DAR
<div><div></div><div></div></div>	02/23/18 10:26 AM	_OFFICE_	NMW	_OFFICE_	MOCK CALLS	NMW
<div><div></div><div></div></div>	02/23/18 10:21 AM		DAR		MOCK CALLS	DAR
<div><div></div><div></div></div>	02/23/18 10:20 AM	_OFFICE_	BWB	_OFFICE_	MOCK CALLS	BWB
<div><div></div><div></div></div>	02/23/18 08:40 AM	_OFFICE_	KRD	_OFFICE_	DAPHNE BLAKE	KRD
<div><div></div><div></div></div>	02/23/18 08:39 AM	_OFFICE_	KRD	_OFFICE_	VELMA DINKLEY	KRD
<div><div></div><div></div></div>	02/23/18 08:38 AM	_OFFICE_	KRD	_OFFICE_	FRED JONES	KRD
<div><div></div><div></div></div>	02/22/18 12:18 PM		DAR		MOCK CALLS	DAR
<div><div></div><div></div></div>	02/16/18 12:41 PM		DAR		MOCK CALLS	DAR

|< < 1 > >|

10 items in 1 page

Page Size: 10

KEYSTONE
Answering Service

KEYSTONEANSWERINGSERVICE.COM

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Members






The “Members” tab is where you can keep a current list of your employees. To edit an employee profile:

- Select the blue box in the far left column.
- In the popup box, add in all the relevant information for each individual.

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

Member Maintenance:904 - Dr. Startel Clinic

Filter Type:AllCategory:All

	Name	Unique ID	Category	Checkin Client ID
	_OFFICE_			
				
				
				
				

Page Size:10

MessagesMembersDirectoriesTAAsLogger

Edit Member --- Required fields are marked with ★

OFFICE

GeneralInstructionsOnCall InfoAddress(es)Phone(s)Alpha Pager(s)Digital Pager(s>Email(s)Fax(es)SMS(s)SMP(s)

☒ On Call

Name: ★_OFFICE_

Unique ID:

Category:-- None --

Close

Contact

The “Contact” tab is where you can directly message a member or “OnCall” member from the portal. To send a message:

- Check the ‘OnCall Now’ option to filter to a list of members who are currently OnCall.
 - ‘Select’ the member you would like to contact.
- *Helpful hint: You can also do this from the full main list as well!**

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

Member Lookup: 904 - Dr. Startel Clinic

Search Contacts

☐ On-Call Now

	Name	Category
Select	_OFFICE_	
Select	Dr. Denise Rogers	
Select	Dr. Gordon Hille	
Select	Dr. Kelly Davis	
Select	Dr. Renita Dorty	

<1>

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

Search Contacts

☒ On-Call Now

	Name	Category
Select	Dr. Kelly Davis	
Select	Dr. Gordon Hille	

<1>

Page Size: 10

Contact

To contact a member utilizing the listed Dispatch Steps:

- Type the message in the ‘Send Message’ box.
- Click ‘Send Now’ or schedule the message for Future Delivery.

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

Current Member:904 - Dr. Startel Clinic : Dr. Kelly Davis

Dr. Kelly Davis

Message HistoryMember Calendar ViewOn-Call ScheduleEdit Member

Transport Information

Phone Number	Dr. Kelly Davis - Cell	815-541-7777
SMS	Dr. Kelly Davis - SMS	8155417777

Instructions

AOH Dispatch Steps:

1. SMS (Ctrl + S) - MUST CLEAR!

2. Call Dr. Davis on cell. IFNA leave a VM

TELL CALLER IF THEY DO NOT HEAR FROM THE O/C WITHIN 30-MINS TO CALL US BACK!!

Send Message

Sender:sales1Send Now

Phone#:03/15/2018 4:45 PMFuture Delivery

Message:

255 characters left

Dispatch Steps

Step 1: Dr. Kelly Davis - SMS: 8155417777	Retry 0 times	Delay 15 minutes
Step 2: Dr. Kelly Davis - Cell: 815-541-7777	Retry 0 times	Delay 10 minutes

To View/Manage Members, you can click on:

- Message History
- Member Calendar View
- On-Call Schedule
- Edit Member

Directories

Review and update your frequently asked questions, zip codes and service areas in the “Directories” Tab.

To edit each row:

- Click the blue box in the far left column.
- Enter in the updated information in the popup box.

The screenshot displays a web application interface with a blue navigation bar at the top containing links: Home, Messages, Members, Contact, Directories (active), TAAs, Logger, and Reports. Below the navigation bar, there is a 'Directory Maintenance' section with a dropdown menu set to 'Dr. Startel - FAQ (904001)'. To the right of this is a search bar with a 'Search' button and a gear icon. The main content area features a table with a header row labeled 'Service' and a data row for 'Pre-Appointment Paperwork'. An orange arrow points to a blue box in the far left column of the 'Pre-Appointment Paperwork' row. An 'Edit Directory Entry' popup window is open, showing fields for 'Service' (Pre-Appointment Paperwork), 'Response' (Before your appointment, please complete the FAQ and bring that signed), 'Row Text Color' (a black color picker), and 'Row Access' (0). The popup also has 'Save', 'Reset', and 'Close' buttons at the bottom. The table has a pagination bar at the bottom showing '|< < 1 > >|'.

	Service
<input type="checkbox"/>	Referrals?
<input type="checkbox"/>	Any landmarks near your location?
<input type="checkbox"/>	Pre-Appointment Paperwork
<input type="checkbox"/>	Services?
<input type="checkbox"/>	Credentials?
<input type="checkbox"/>	Accepted insurances?

Page Size: 10

Directories

To switch between multiple directories, click the arrow on the “Directory of Maintenance” menu box on the right side of the screen.

Selecting a directory can allow you to export, add and delete specific rows of information.

Directory Maintenance:

- Dr. Startel - Doctors (904002)
- Dr. Startel - Doctors (904002)
- Dr. Startel - FAQ (904001)

Search

TAAAs

To insert notes in your account, you will use the “TAAAs” section in the Web Portal. These messages can be special information such as *“Will be closed for Labor Day and will reopen September 5th”* or scheduling notes such as *‘Schedule is full for today – no more same day appointments’*. To add a new TAA:

- Click on the plus sign on the toolbar.
- Complete the required information in the popup box.

Helpful hint: Make sure to adjust the time!

The image shows a screenshot of a web portal with a blue header containing navigation links: Home, OnCall, Messages, Members, Directories, TAAAs, and Logger. The 'TAAAs' tab is selected. Below the header, there is a toolbar with a 'Filter Mode' dropdown set to 'All', a 'Search for Alert Mes' input field, and a plus sign icon highlighted by an orange arrow. Below the toolbar, a table with columns 'Alert Message' and 'Frequency' is shown, displaying 'No TAAs to Display.'.

The 'Add TAA' popup form is open, titled 'Add TAA' with a close button (X) in the top right corner. It includes a note: '--- Required fields are marked with ★'. The form contains the following fields and sections:

- Alert: ★**: A large text area for the alert message, with a '1024 character(s) left' indicator and a 'Disabled' checkbox.
- Ordinal: ★**: A text input field containing the value '0'.
- Active**: A section containing 'From: ★' and 'To: ★' time pickers, both set to '12:00 AM' and '12:00 PM' respectively, with calendar icons.
- Frequency**: A row of buttons for 'Once', 'Weekly', 'Monthly', and 'Yearly', with 'Monthly' selected.
- Days**: A row of checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday', all of which are currently unchecked.
- Expiration Setting**: A section containing a checked checkbox for 'Never Expires' and an 'Expiration Date:' field set to '02/23/2018' with a calendar icon.

At the bottom right of the popup form are 'Close' and 'Save' buttons.




Logger

In the Web Portal “Logger” you have the ability to go back and listen to your business’s calls. The calls can be sorted based on categories such as day, time and agent. If you need to keep a specific call, it can be downloaded onto your device or sent in an email straight from the Logger.

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

Client:904 - Dr. Startel Clinic

Search Recordings

  	Call Time	Call Type	Agent ID	ANI/Dialed	Duration	Play
No records to display. Click Search button to refine your search.						

Logger

To search your call database, click the “Search Recordings” option on the right side. Options that you can search include: Date To and From, Duration of the Call, Agent ID and Type of Call.

HomeOnCallMessagesMembersContactDirectoriesTAAsLoggerReports

Call Time

Call Type

Agent ID

ANI/Dialed

No records to display. Click Search button to refine your search.

From:03/15/2018 12:00 AM

To:

Duration:Seconds

Agent ID:

ANI/Dialed:

Type:All

CancelSearch

Search Recordings

Play

Reports

The Client Settings Report allows you to view/export all of your account information.

- If you have access to more than one client, checking the 'All Accessible Clients' option will allow you to run the report for all the clients.
- Then, click the blue 'Run Report' button to view/export the client data.
- To export the information, click the 'Export' button above the Client ID.

The screenshot shows the 'Reports' section of a web application. A blue navigation bar at the top contains links: Home, OnCall, Messages, Members, Contact, Directories, TAAs, Logger, and Reports. Below this, a 'Client:' dropdown menu is set to '904 - Dr. Startel Clinic'. To its right is a checkbox labeled 'All Accessible Clients' and a blue 'Run Report' button. An orange arrow points to the 'Run Report' button. Below these elements are three tabs: 'Client Settings', 'In Call Summary', and 'Call Detail'. The 'Client Settings' tab is active, displaying a 'Client Settings Report'. This report includes a small table with the following data:

User Name	Sales1
Report Date	3/14/2018 4:50:42 PM
Client(s)	904 - Dr. Startel Clinic

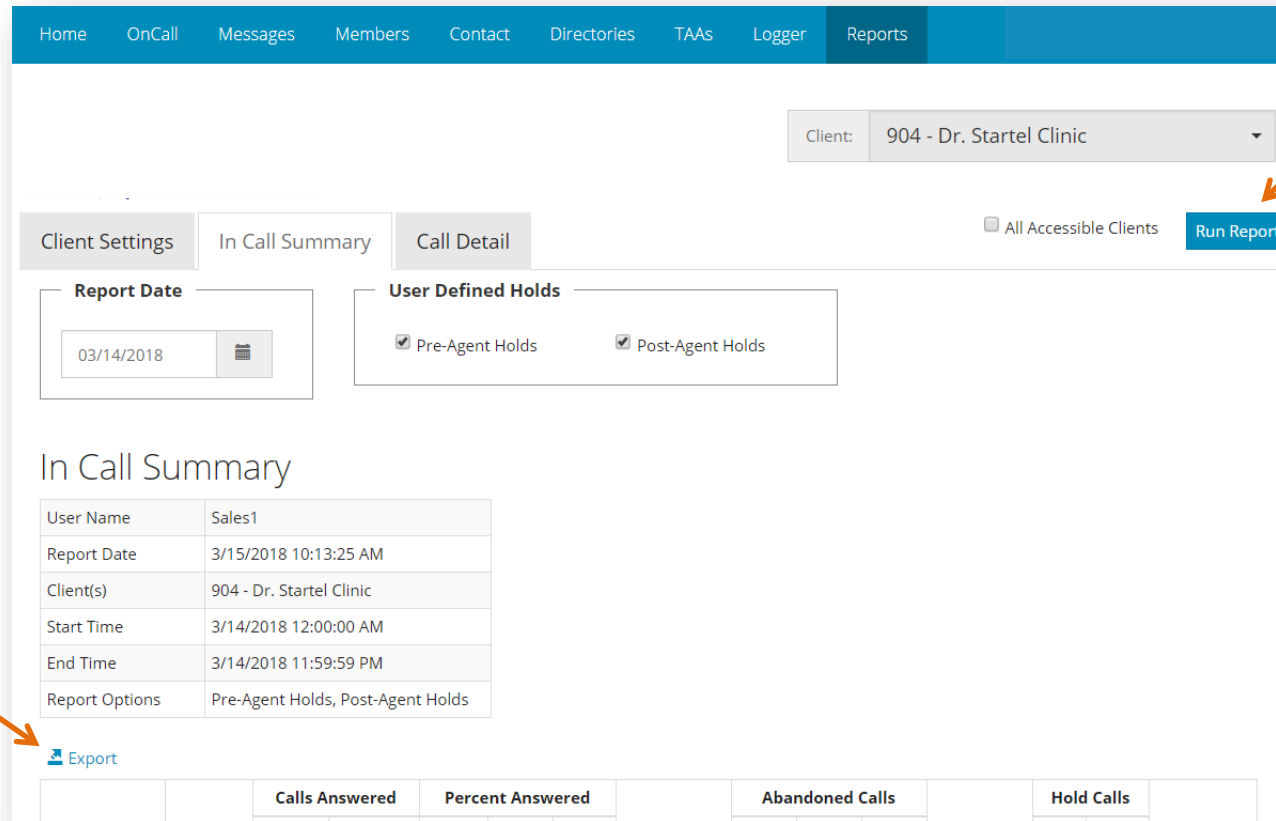
Below this table is an 'Export' button with a download icon. An orange arrow points to this button. Underneath the 'Export' button is a larger table with the following data:

	Client ID	Name	Account Number	Type	Answer Phrase
🔄	904	Dr. Startel Clinic	904	Single	Answering Service of Dr. Startel, how can I help you.

Reports

The In-Call Day Summary Report allows you to view and export call traffic in 30 minute increments.

- If you have access to more than one client, checking the 'All Accessible Clients' option will allow you to run the report for all the clients.
- Choose the date you like to review and the types of 'Holds' you want to include.
- Then, click the blue 'Run Report' button to view and export the client data.
 - To export the information, click the 'Export' button above the report table.



The screenshot shows the 'Reports' section of a web application. The top navigation bar includes links for Home, OnCall, Messages, Members, Contact, Directories, TAAs, Logger, and Reports. The 'Reports' tab is active. Below the navigation bar, there is a client selection dropdown set to '904 - Dr. Startel Clinic'. To the right of this dropdown is a checkbox for 'All Accessible Clients' and a blue 'Run Report' button, which is pointed to by an orange arrow. Below these are three tabs: 'Client Settings', 'In Call Summary', and 'Call Detail'. The 'In Call Summary' tab is selected. Under this tab, there are two sections: 'Report Date' with a date picker set to '03/14/2018', and 'User Defined Holds' with checkboxes for 'Pre-Agent Holds' and 'Post-Agent Holds', both of which are checked. Below these sections is a table titled 'In Call Summary' with the following data:

User Name	Sales1
Report Date	3/15/2018 10:13:25 AM
Client(s)	904 - Dr. Startel Clinic
Start Time	3/14/2018 12:00:00 AM
End Time	3/14/2018 11:59:59 PM
Report Options	Pre-Agent Holds, Post-Agent Holds

Below the table is an 'Export' button with a download icon, pointed to by an orange arrow. At the bottom of the interface, there is a table header with columns: 'Calls Answered', 'Percent Answered', 'Abandoned Calls', and 'Hold Calls'.

Reports

The Call Detail Report will list all calls for the selected account(s) based on a specific timeframe and filter parameters.

- If you have access to more than one client, checking the 'All Accessible Clients' option will allow you to run the report for all the clients.
- Choose the date range, call types and filter options desired.
- Then, click the blue 'Run Report' button to view and export the client data.
- To export the information, click the 'Export' button above the report table.

The screenshot shows the 'Reports' section of a web application. At the top is a navigation bar with links: Home, OnCall, Messages, Members, Contact, Directories, TAA's, Logger, and Reports. Below this, a 'Client' dropdown menu is set to '904 - Dr. Startel Clinic'. An orange arrow points to this dropdown. To the right of the client selection is a checkbox for 'All Accessible Clients' and a blue 'Run Report' button. Below these are three tabs: 'Client Settings', 'In Call Summary', and 'Call Detail' (which is active). Under the 'Call Detail' tab, there are three sections: 'Date/Time Range' with 'From' and 'To' date pickers (both set to 03/14/2018), 'Call Types' with checkboxes for 'In Calls', 'Out Calls', and 'VM Calls' (all checked), and 'Filter Options' with a dropdown set to 'No Filter', an 'is' label, another dropdown, and a 'Second(s)' input field. Below these sections is the 'Call Detail Report' header and a table with the following data:

User Name	Sales1
Report Date	3/15/2018 10:17:20 AM
Client(s)	904 - Dr. Startel Clinic
Start Time	3/14/2018 12:00:00 AM
End Time	3/14/2018 11:59:59 PM
Report Options	Call Types: In, Out, VM

Below the table is an 'Export' button with a download icon, indicated by an orange arrow. At the bottom is a table header with the following columns: #, Ref ID, Call Type, Start Time, End Time, Total Call Time, Hold Time, Talk Time, Till Answer Time, Voicemail Time, Patch Time, Client ID, Agent, and ANI/Dialed.

Logger Privacy Policy

This Policy sets forth how the owners and operators of www.keystoneanswering.com ("we" or "us"), collect and use the information provided to us from our website users, including our prospective or current business customers (through any individual authorized employee or representative of such customers) and certain other information that we automatically collect from all users through access and use of www.keystoneanswering.com ("Website"), or through any communications with us by any such parties (collectively referred to as "You" hereinafter). **YOU ACKNOWLEDGE AND AGREE THAT BY USING ANY PORTION OF THIS WEBSITE OR ANY SERVICES OFFERED ON THIS WEBSITE, SUCH USE SHALL INDICATE THAT YOU HAVE READ, UNDERSTAND AND THAT YOU AGREE TO OUR COLLECTION AND USE OF THE INFORMATION PROVIDED BY YOU OR AUTOMATICALLY COLLECTED BY US, AS SET FORTH IN THIS POLICY.**

Illegal or Abusive Usage is Strictly Prohibited: You may not abuse, threaten or impersonate others with the use of information from our audio recordings. You may not use the Website and/or its client data for any illegal or unauthorized purpose. International users must agree to comply with all local laws regarding online conduct and acceptable content. Should you be found to have engaged in illegal or abusive usage of client information, Keystone Answering Service will suspend your account or usage as applicable, and investigate into further legal actions.

If you have any general questions or concerns about this Policy, you may contact us by sending an email with your questions, comments or concerns to contact@keytas.com.