Training Overview

XXXXXXXXXX - Trainer

Reception and Admin Training

Duration 1 Hour

If you could kindly remain muted during the session to reduce background noise.

I'll open the floor to questions at the end of each section, or you can use the chat panel to type questions as we go.

Slides and additional info will be shared after the session.

Session Agenda

- Cloud Telephony

- Working in practice

- Working remotely

- Calling internally

- Calling externally

- Calling patients

- Help & Support

Cloud telephony - differences & benefits

Line Capacity

- No engaged tone and no limit to queueing for patients
- No capacity limit on outbound calls

Visibility

- Real-time view of which staff are active and their current status
- Real-time view of call traffic and efficiency statistics

Call Recordings

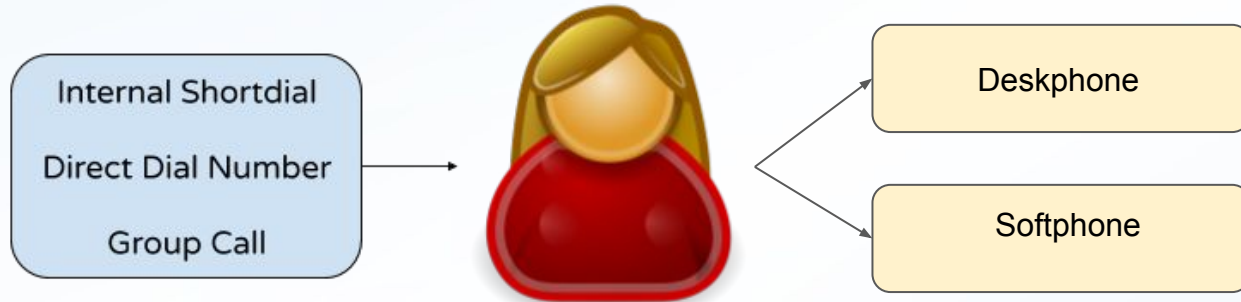- All inbound and outbound calls recorded regardless of device used

Video Calling

- Switch from audio to video call in call

Flexible Working

- Staff can easily work remotely
- Staff can be located anywhere in practice

Users Not Phones

Internal Shortdial

Direct Dial Number

Group Call

Deskphone

Softphone

- It doesn't matter where people are located when you want to contact them

- It doesn't matter which device people are active on when you want to contact them

Desk Phone in the Practice

Linekeys - used to log in and out of the handset manually

Alpha-numeric keypad - dial numbers or search lists

Softkeys - change function depending on phone status

Navigation keys - scroll through lists and select entries

Volume - either ringer or call volume

Hardkeys - default functions, including Transfer and Headset

Using a headset

Plug a compatible headset into the socket on the left-hand side of the deskphone

Press the Headset hardkey

Check the headset icon shows at the top left-hand side of the screen
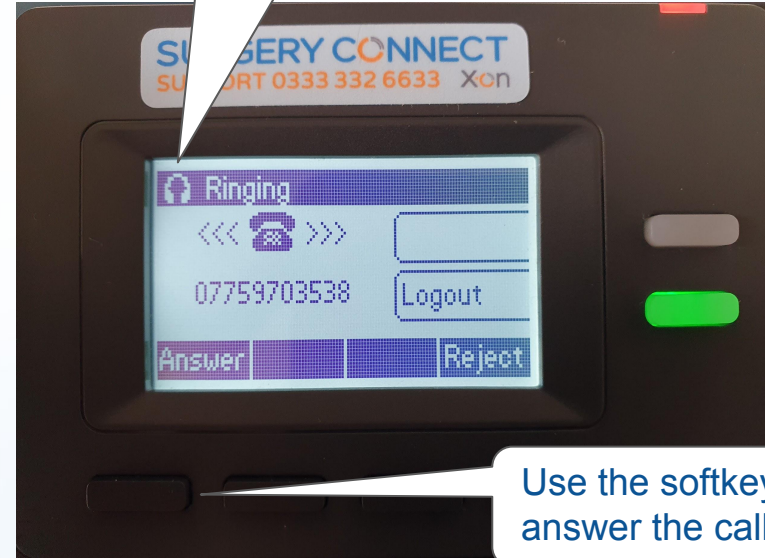
Red light will flash with incoming call

Ringing

<<< ☎ >>>

07759703538   Logout

Answer   Reject

Use the softkey to answer the call

Logging in on a Desk Phone
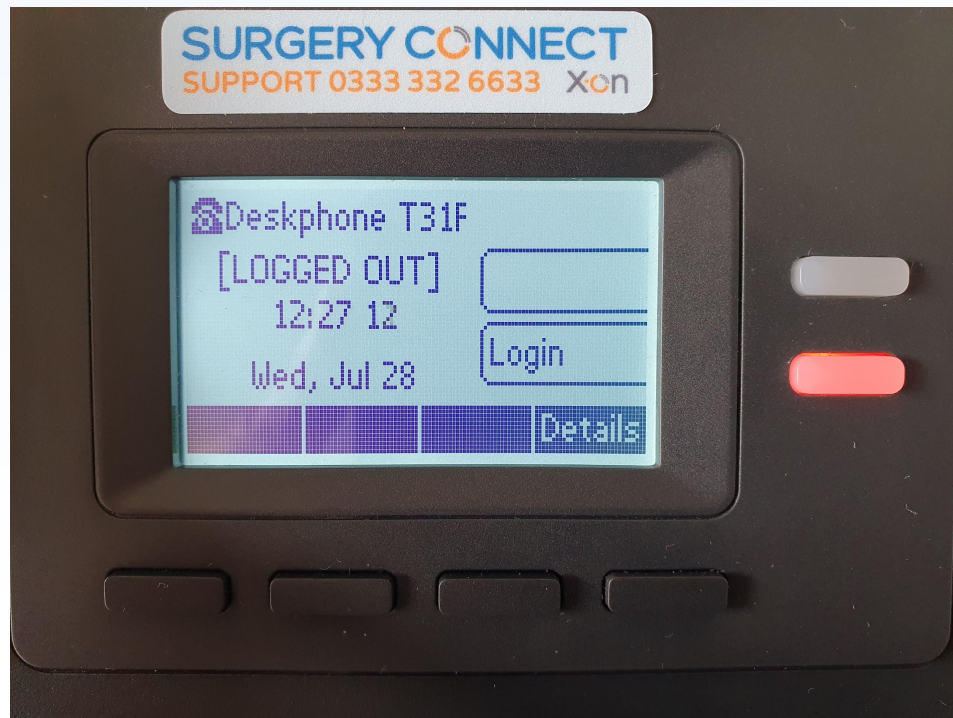
Integration

Log in as usual to your clinical database and you will be automatically logged in to the Deskphone

Go DND and GPickup
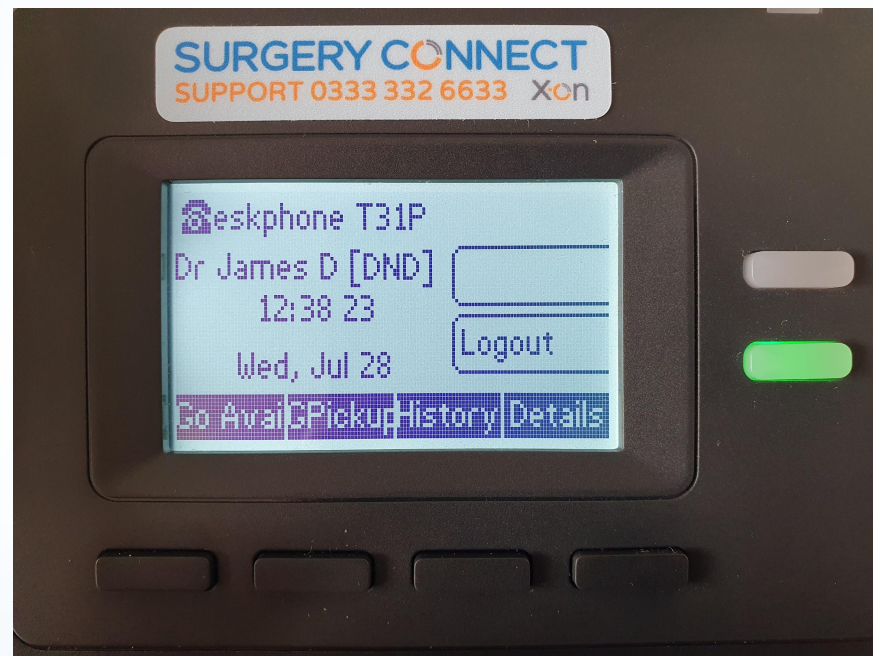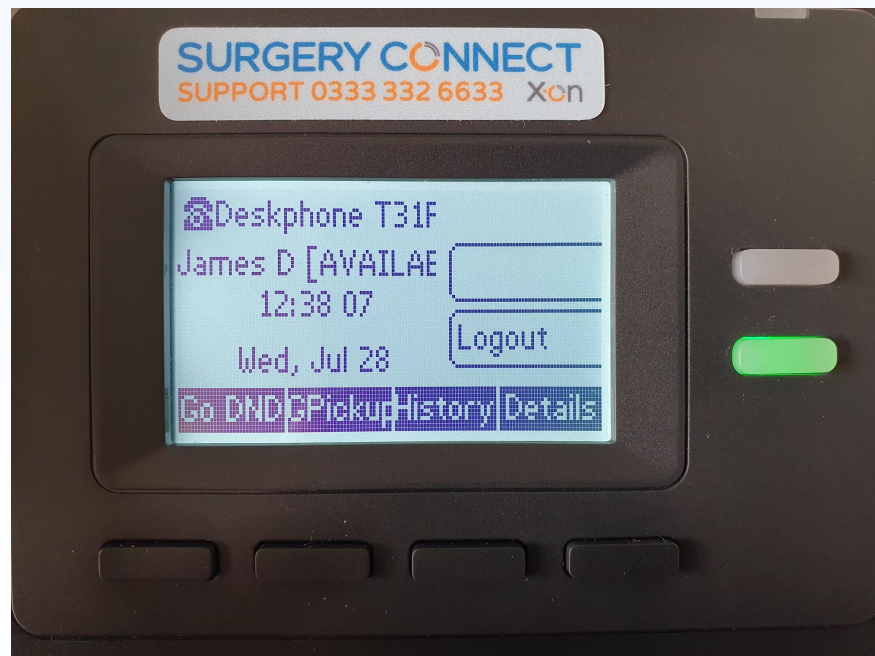
Hold
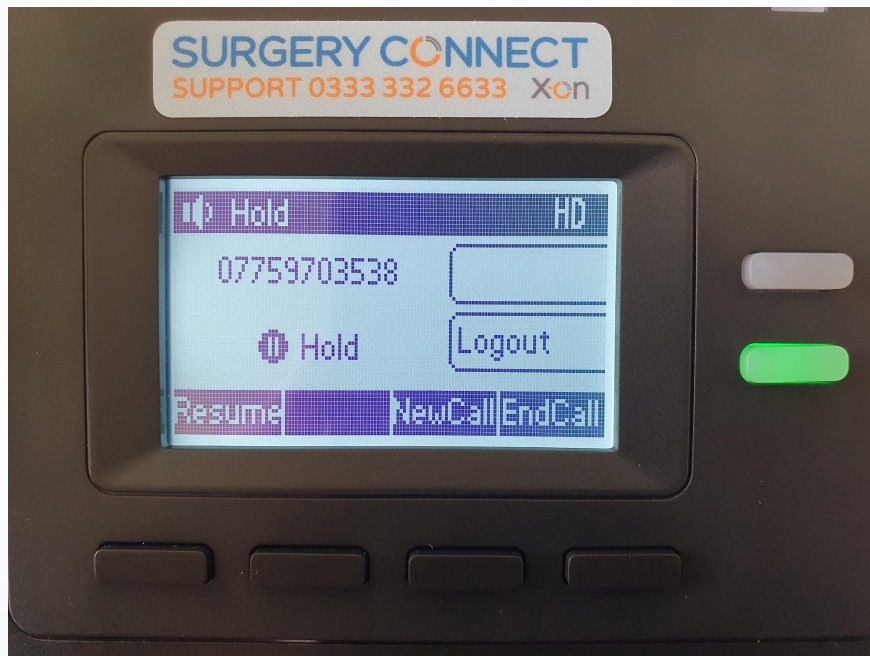
Transfer
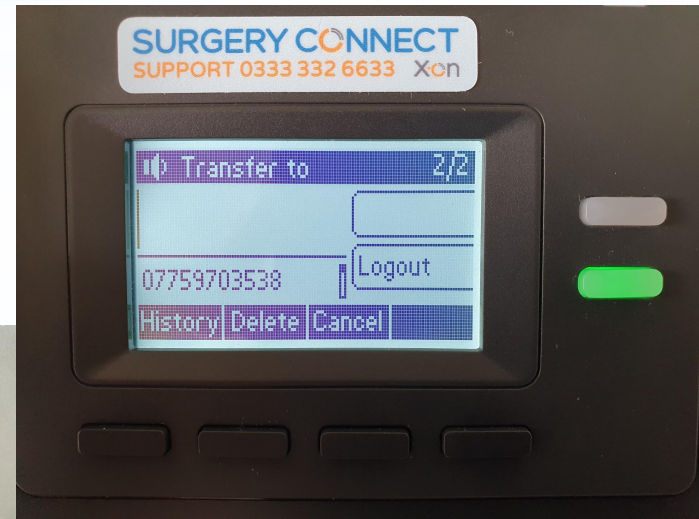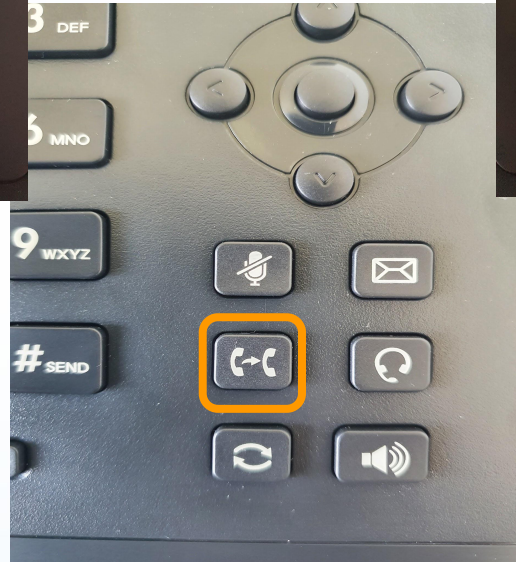
Pause Recording and Third Party Conferencing
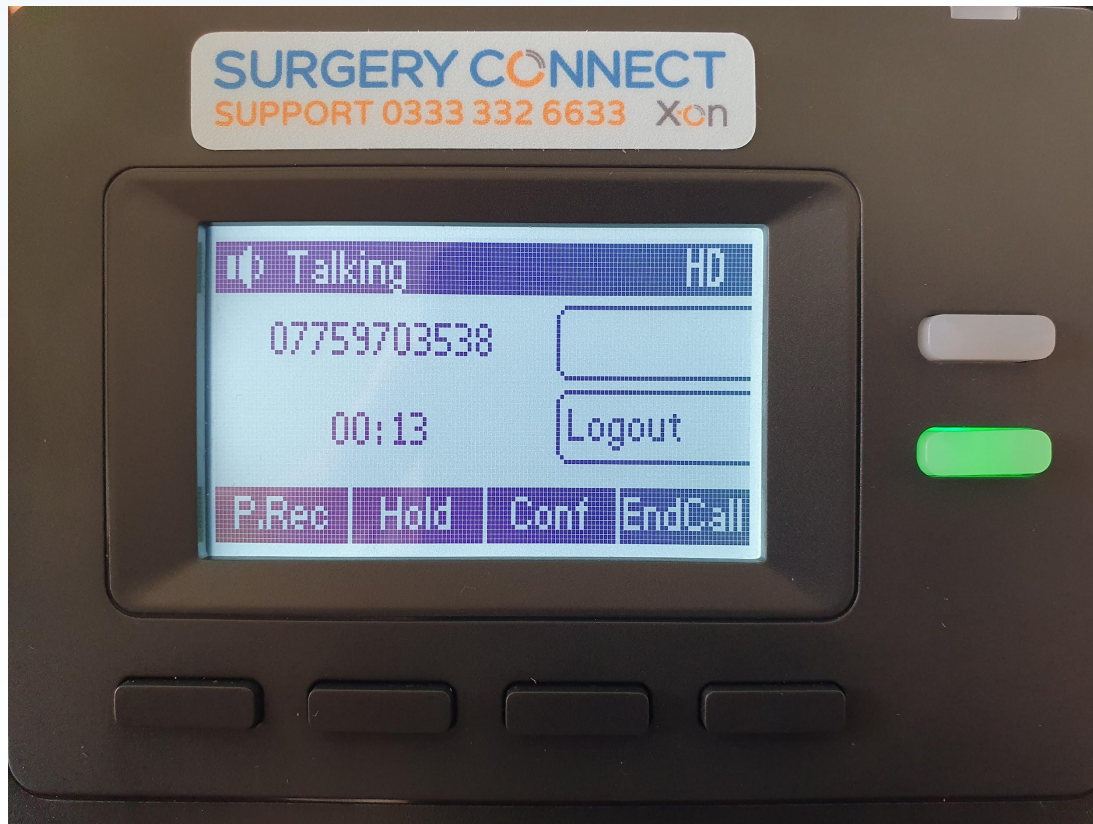
T31P Prompt Card

SURGERY CONNECT — *T31 Prompt Card*

Hardkeys:

- If using headset or speaker press to connect/disconnect call
- Last number redial — Listen to voicemail
- Mute - caller can still be heard, but cannot hear agent

Transfer call:

- + short dial → If extension picks up, press again to complete transfer
- → If no answer EndCall and Resume to return to call

Softkeys:

- Hold — Caller is on-hold and hears music — Resume — Resume call
- GPickup — Group pick up - press softkey then lift handset
- Go DND — Do Not Disturb — Go Avail — Extension again targeted for incoming calls
- Conf — Press during call, dial third party, press Conf again to connect all parties

User Console

sso.x-onweb.com

Call List

User List

	Started	Caller	Dialled	Queue	Answered by	Duration
	09:10	07542 596569	Main Number			Answered: 47s
	09:09	07807 641743	Main Number			Menu: 5s
	09:07	Dr N Browne	07772 535646			Call Out: 3m 3s
	09:07	07445 952762	Main Number	Reception		Queuing: 2m 8s
	09:01	07909 596710	Main Number	Reception		Queuing: 7m 54s
	09:00	07754 883299	Main Number	Reception (Hayley Fearnley)	Hayley Fearnley	Call In: 4m 8s
	09:02	Michael Poplawski	07711 830331			Call Out: 8m 24s
	09:02	07843 926057	Main Number	Reception		Queuing: 7m 4s
	09:09	Victoria McGrath	Kathryn Thomas		Kathryn Thomas	
	09:09	Victoria McGrath	Kathryn Thomas			
	09:07	Unknown	Main Number			
	08:58	07925 012472	Main Number	Reception (3m 22s)	Hayley Fearnley	
	08:57	Dr N Browne	07807 641743			
	09:02	07946 748583	Main Number	Reception (11s)		
	08:48	07712 537981	Main Number	Reception (8m 8s)	Hayley Fearnley	

1 2 3 4 >   1–15 of 53

Emergency Bypass 333
HB 223 Hayley Bay...   JC 229 Jo Cliff
KT 216 Kathryn Tho...   VM 224 Victoria Mc...
WS 221 Wendy Sou...

Healthcare Professionals 300
HB 223 Hayley Bay...   HF 250 Hayley Fear...
JC 229 Jo Cliff

Reception 301
HB 223 Hayley Bay...   HF 250 Hayley Fear...
JC 229 Jo Cliff

No group
AA 220 Alison Aldred   DJ 201 Debbie John...
DE 205 Dr Eleanor ...   DF 206 Dr F Awan
DN 213 Dr N Browne   DN 207 Dr N Green
DZ 204 Dr Z William   GT 208 GP Trainee
JY 227 Jaime Yates   JH 219 Jane Haslam
JB 228 Joanne Brown   KC 222 Katherine C...
KF 214 Kerry Fearick   MP 310 Michael Pop...
MC 230 Mohammad...   NF Nicholas Fernandez

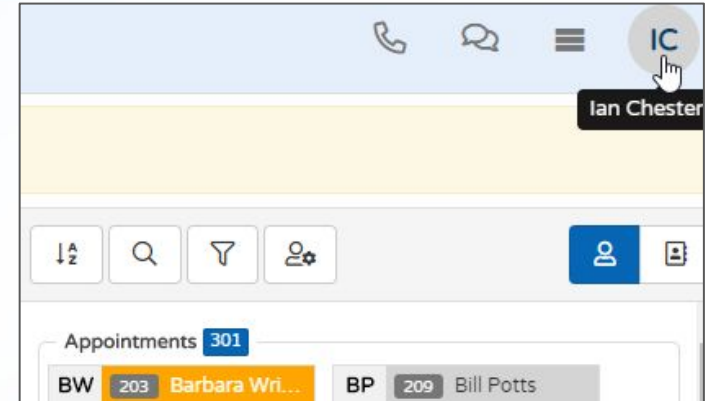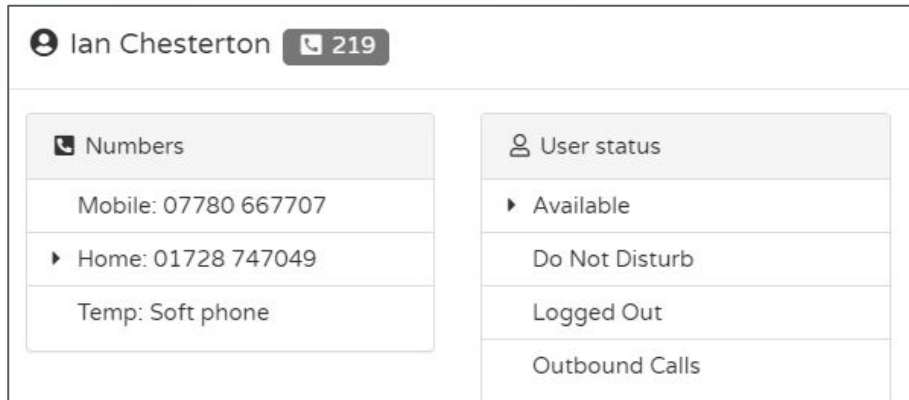| Available Users	Queued Now	Current Longest Q	Inbound Today	Q over 10 min	Avg Q Last Hour	Q Busters Now	Longest Q Buster
8	3	7m 53s	28	0	4m 46s	0	0

Available

Device Management

- Accessed by clicking your initials in the top right of the User Console
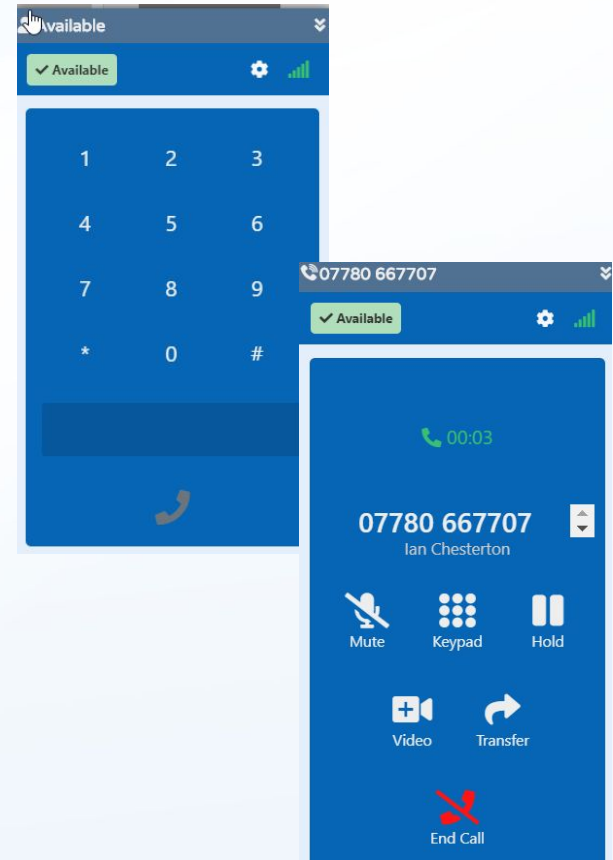

- Choose the device on which to take calls when working remotely

- Set your availability

Softphone Overview

- Just another way to make outbound and take inbound calls

- Every user has a softphone on their User Console

- Runs in the browser - headset preferred but optional

- Option to convert audio call to video call

- Webcam required

- Patient must have adequate data bandwidth (3G minimum)

Quick reference guide to Softphone
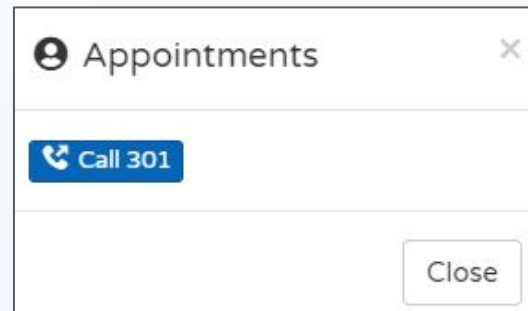
Internal Calling

- Internal calling is the same whether you are in the practice, on your mobile or using the softphone

- The User Console gives a real-time view of who's available

- Click to call a user direct or a group from the console

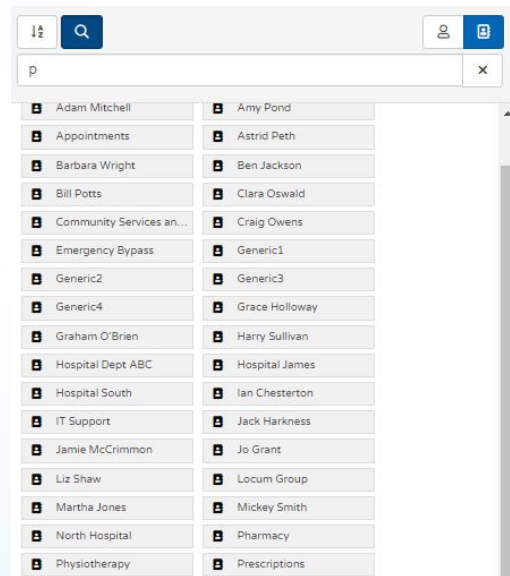- No need to remember people's short dial or keep a list

External Calling (Hospitals, Suppliers etc)

Central Directory

- Digital phone book for practice

- Add useful numbers

- Click to call on any device

Receiving Patient Calls

When a patient call targets your Receptionists -

- A popup will appear with potential matching patients

- It will tell you how long they have queued for

- It will tell you who they last spoke to

- To open the patient record, simply click the name in the popup

Calling Patients

When viewing a patient through clinical integration you can -

- Use the keyboard to make a call

Ctrl | Shift | H — Call the active patient's Home Number.

Ctrl | Shift | M — Call the active patient's Mobile Number.

- Use the Patient Overview to make the call

Type here to search

Mrs Lucille Bluth (07/03/1990)

Contact | SMS Log | Call Log | Triage

Home phone — 0117 496 6666 — Call

Mobile phone — 07780 667707 — Call | SMS

SMS Template — Choose a template — Refresh

NHS Conditions — Choose a condition — Add

- Associate call to patient's record

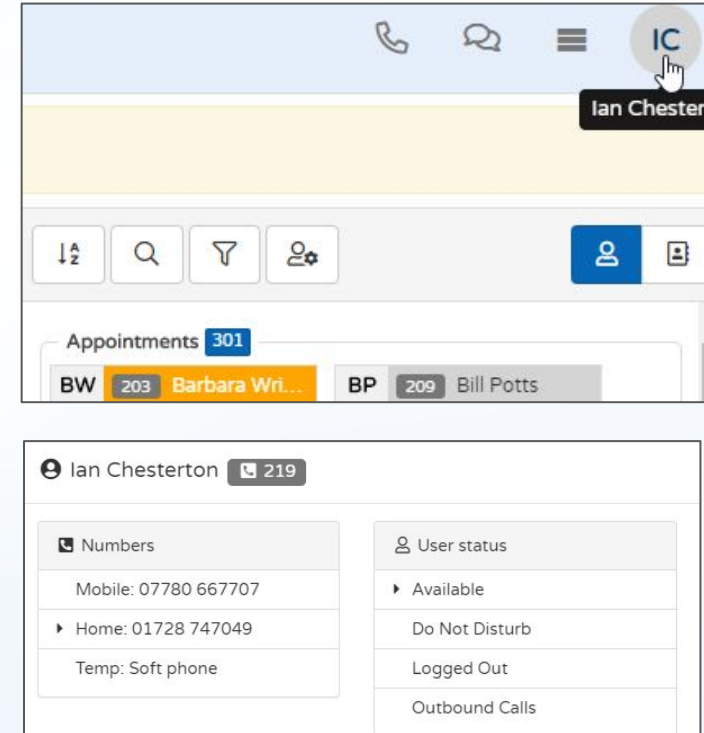**SURGERY CONNECT**

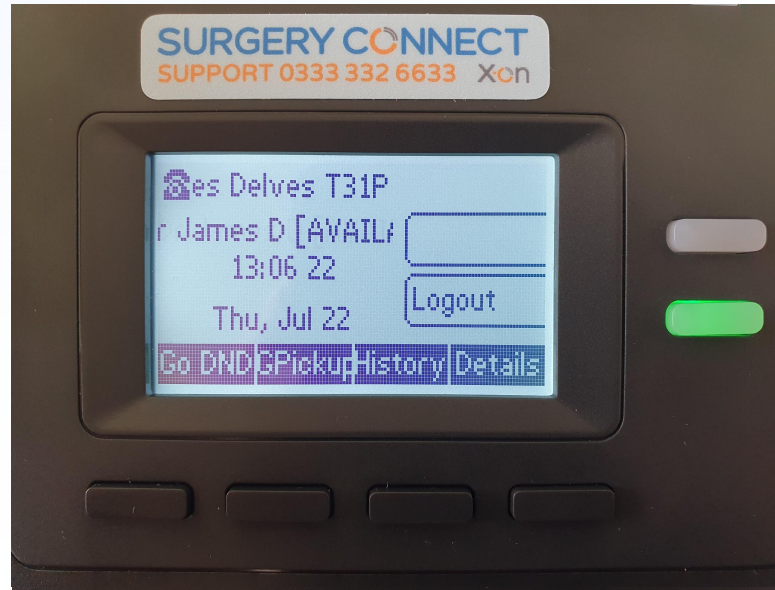Associate call recording with Mr George Bluth?

07876 450214

Yes | No

Version 1.5.1 © X-on 2018

Log out

- **Smartcard**

- **Handset**

- **Softphone**

Help & Support

Pre Go Live

- Call Service Delivery 03333320155

- Email servicedelivery@x-on.co.uk

After Go Live

- Call Support **0333 332 6633**

- Support Portal

Training

- Call 0333 332 6777

- Email training@x-on.co.uk