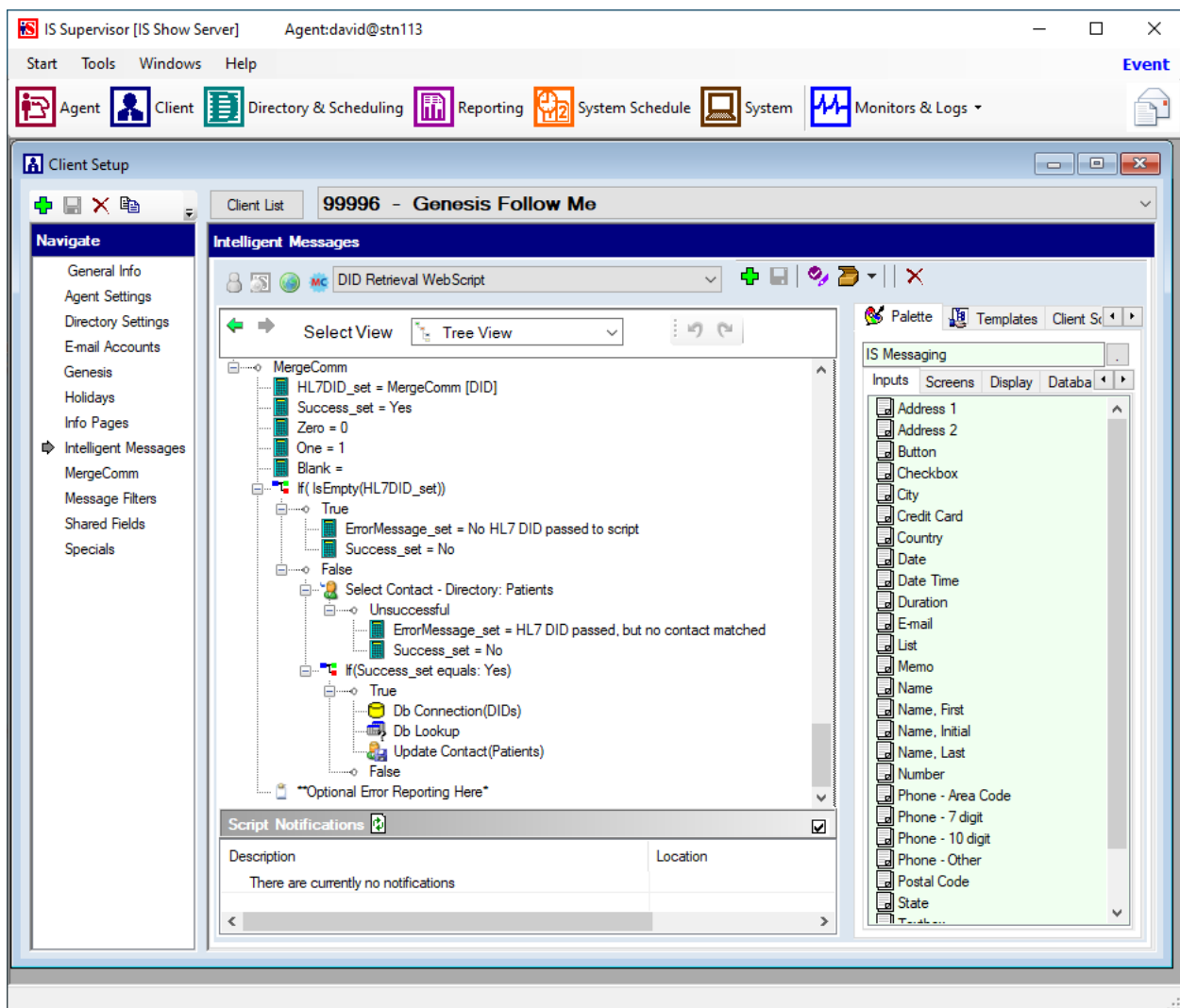


## Supply and Manage DID Numbers for Patients with Genesis Follow Me Messaging

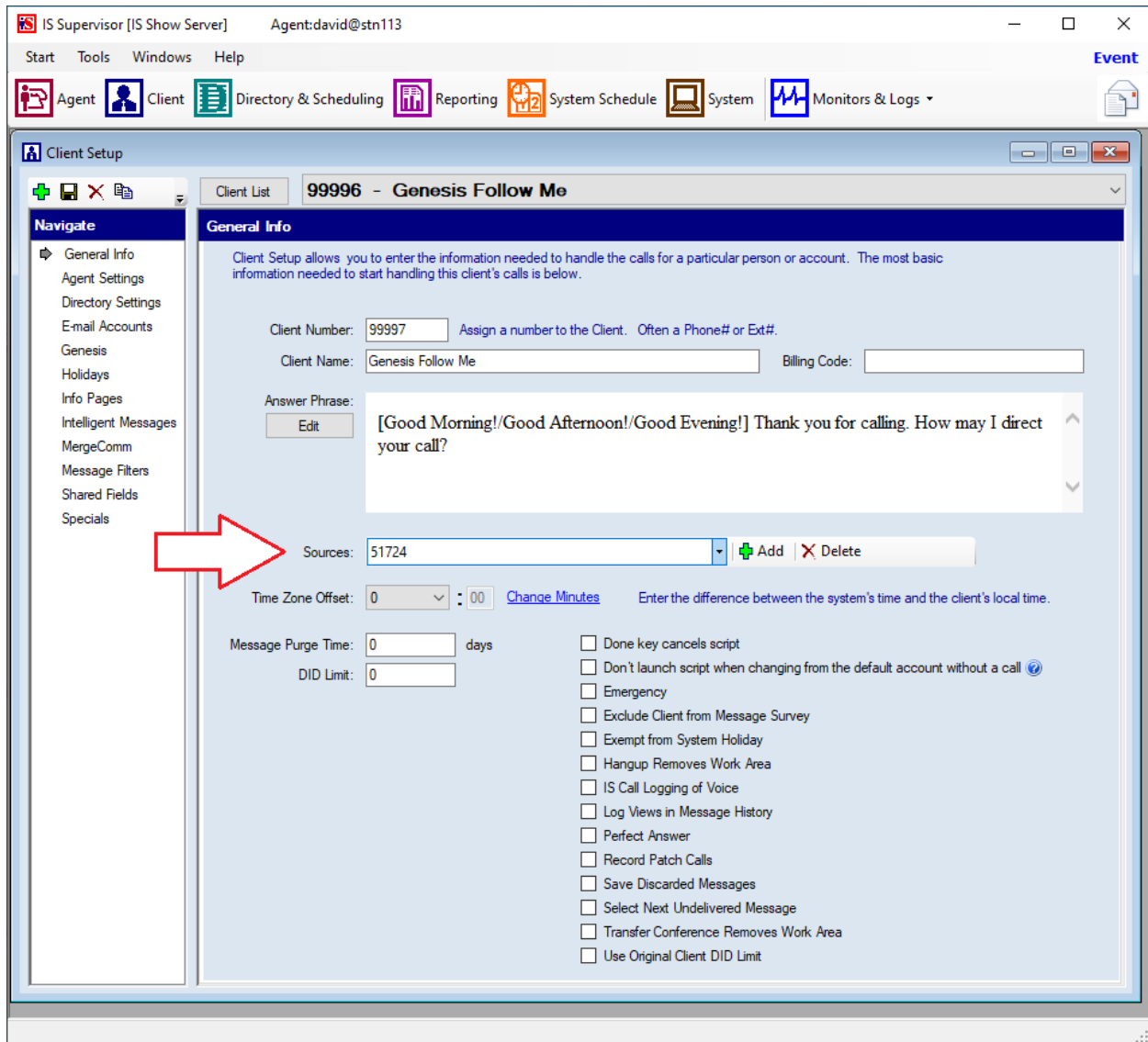
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The Genesis Intelligent Series (IS) Follow Me Messaging feature uses a database, one or two scripts, and the Listing Lookup behavior to provide call forward services per Direct Inward Dialing (DID) number. DID numbers can be either automatically assigned via MergeComm and the HL7 Interface or manually assigned by an agent using a script.

## Client Configuration

Incoming DID client setup can be configured using multiple clients or one. Create one or more IS Clients in IS Supervisor and follow these instructions to add a source for each DID number that you want to use for Follow Me calls.



### Adding Source IDs

To add Source IDs, open the IS Supervisor application and click the Client icon  on the IS Supervisor Toolbar.

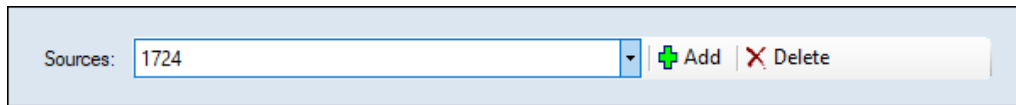
The Select Client screen is displayed.

Click the account number or client name of the client account that will be used to Follow Me calls.

The General Info page is displayed.

More information about creating and editing client accounts is provided in the “Client Setup” section of the *Intelligent Series Supervisor Reference Guide*.

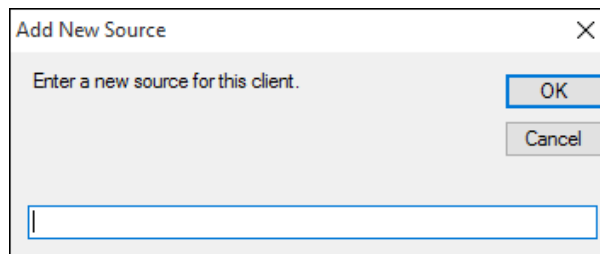
## Sources



The Sources setting is available on systems that have one or more Soft Agent licenses. Sources are the port numbers on which calls come into the Soft Agent application for this Client. Each Client should have one or more unique source numbers so that the Intelligent Series server knows which calls to route to that Client.

**To add a source number, click the Add icon. **

The Add New Source window appears.



**Type the source number that you want to assign to this Client. Then click the OK button.**

The source number is added to the menu of sources.

**Click the Save icon  to save your changes.**

**Repeat these steps to add sources for each of the DID numbers that you want to use with this Client.**

## Listing Lookup Behavior

The Listing Lookup behavior allows for an incoming call to be routed based on information in an IS directory that can be supplied by an HL7 feed. The system identifies the DID number that is dialed and preforms a lookup. It then dials the number in the field selected from the Fields table. If something goes wrong, the call is sent to an agent so it can be transferred.

Listing Lookup requires the optional Listing Lookup DTMF feature.

To add the Listing Lookup behavior to an account, follow these steps:

**On the Client Setup Navigation Menu, click the Genesis hyperlink.**

**If the Behaviors page is not displayed, click the Behaviors hyperlink.**

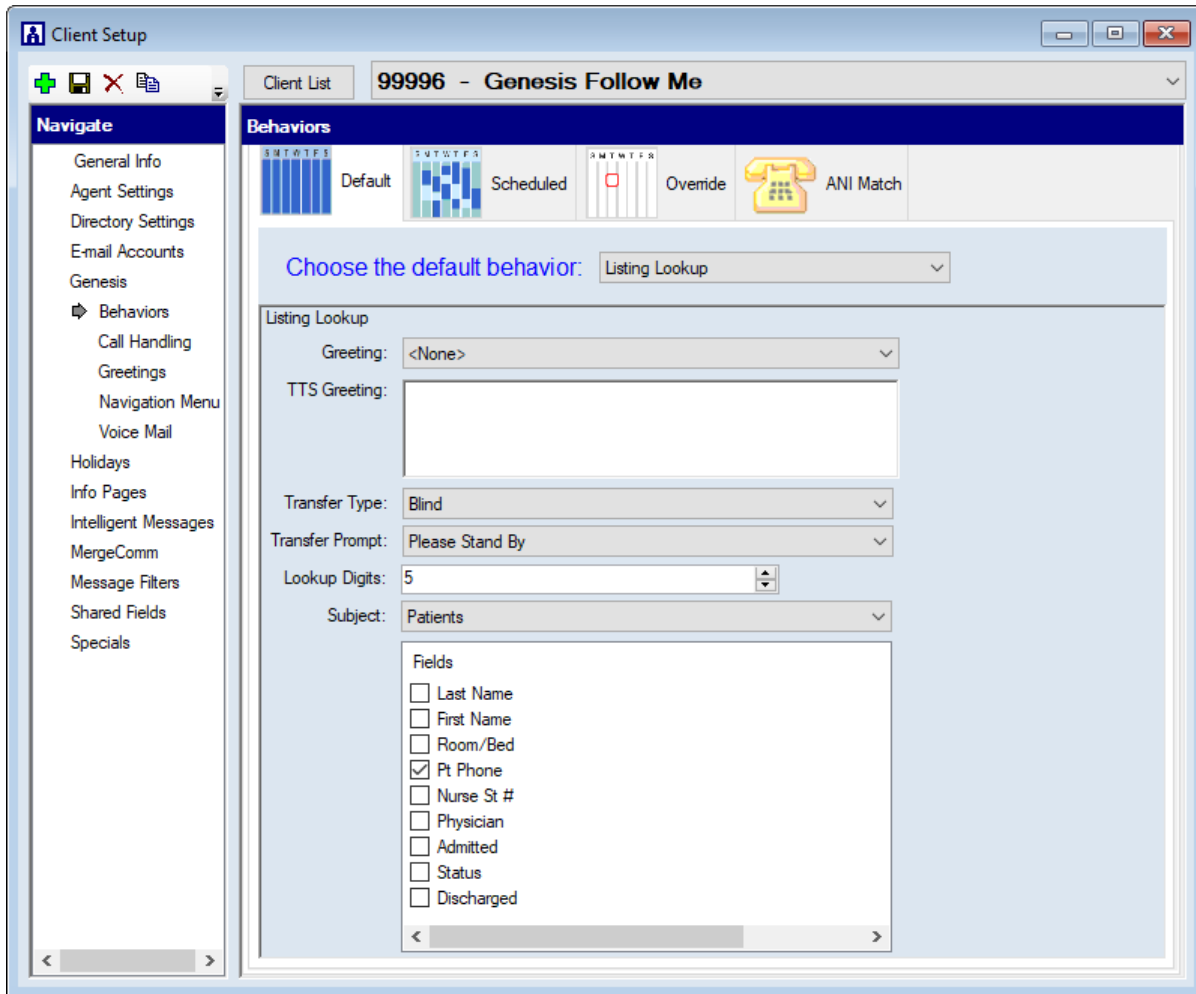
The Behaviors page is displayed.

## Default

The settings under the Default tab determine the behavior used for the Client when the settings under the Scheduled tab and the Override tab are not in effect.

### Choose the Default Behavior

Click the menu and select “Listing Lookup.”



### Greeting

A recorded greeting can be played.

**To play a recorded greeting, select the name of the greeting.**

Greetings can be recorded and saved to IS from the Greetings page.

### TTS Greeting

If a recorded greeting is not provided, text to speech (TTS) can be used to play a greeting. If no recording is assigned to the Greeting property, Intelligent Voice Services uses the text-to-speech engine to play the text entered in the TTS Greeting field.

**To use text to speech to play a greeting, enter the greeting text in this field.**

**Note:** The TTS Greeting will not be played if a recording is assigned to the Greeting property.

## Transfer Type

The Transfer Type property determines the type of transfer that is performed.

- If the Transfer Type is set to “Blind,” the caller is transferred to the phone number and the call is removed from Genesis. After the transfer, the trunk is available for other calls.
- If the Transfer Type is set to “Patch,” the caller is connected to the phone number and the call remains in Genesis. With this Transfer Type, the trunk remains in use for the entire duration of the call, which prevents the trunk from being used for other calls.

**For Follow Me, set the Transfer Type to “Blind.”**

## Transfer Prompt

A prompt can be played to the caller before the call is transferred.

- **Select “None” to skip playing a transfer prompt.**
- **Select “Hold For” to have IS Voice Services play, “Please hold for,” followed by the listing’s greeting.**
- **Select “Please Stand By” to have IS Voice Services play, “Pease stand by.”**
- **Select “Transfer Op” to have IS Voice Services play, “Please hold while your call is being transferred.”**

More information about listing greetings is provided in the “Directory Setup” section of the *Intelligent Series Supervisor Reference Guide*.

## Lookup Digits

The Lookup Digits setting determines how many digits to expect when Voice Services asks the caller to enter the Lookup ID of the person to page.

**Enter the number of digits used in the Lookup IDs in the directory Subject.**

## Subject

The Subject setting determines which IS Directory Subject to use to look up contacts.

**Select the directory Subject that contains the directory listings for this client.**

## Fields

The Fields table is used to specify the fields that contain numbers to which the caller can choose to be transferred.

If multiple fields are selected, IS Voice Services uses text to speech to read the names of the fields and prompts the caller to choose one. The call is transferred to the number contained in the field.

If a single field is selected, the call is transferred to the number contained in that field.

**Select the check boxes next to the names of the fields that contain numbers that to which the caller can choose to be transferred.**

**Click the Save icon  to save your changes.**

## Loading the Genesis Follow Me Scripts

To load the script template, click the Intelligent Messages hyperlink on the Client Setup Navigation Menu.

The Easy Script Editor is displayed.

Click the menu to the right of the Import/Export icon. 

Select “Import Script.”

The Import/Export Wizard opens to guide you step-by-step through the process of importing Intelligent Messaging scripts.

**Import the DID Retrieval WebScript script.**

The Follow Me Administration Script can be loaded on a separate IS Client or its functionality can be incorporated into the DID Retrieval WebScript script.

**Select a different IS Client and then repeat these steps to load the Follow Me Administration Script.**

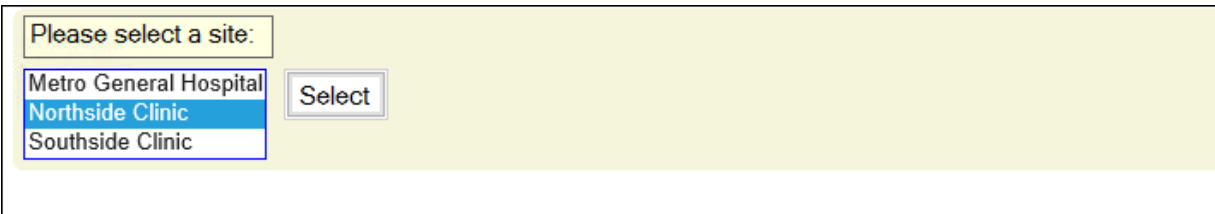
OR

**Contact Amtelco Field Engineering about combining the Follow Me Administration functions into the DID Retrieval WebScript script.**

More information about importing and editing scripts is provided in the “Easy Script Editor” section of the *Intelligent Series Supervisor Reference Guide*.

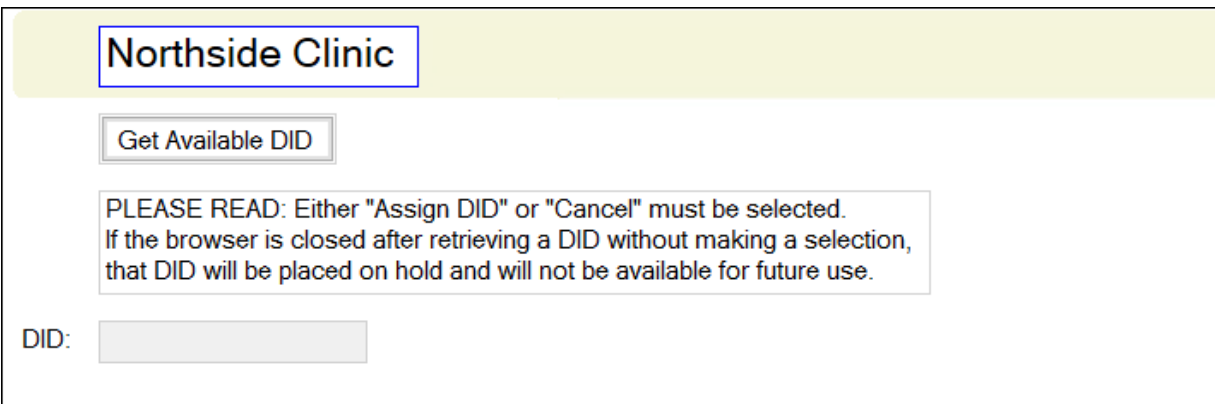
## Working with the DID Retrieval Web Script

The agent script can be accessed through the Soft Agent application or a web browser. When the script is launched, the agent is prompted to select a site. The agent selects a site and then clicks the Select button.



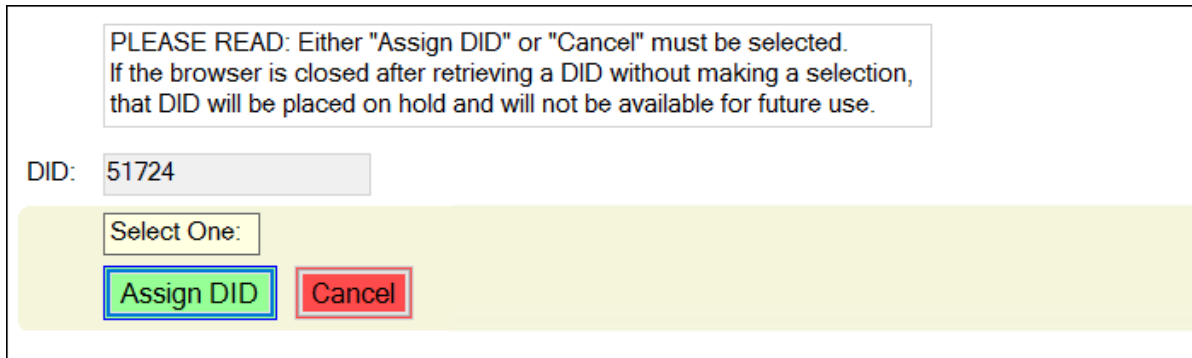
A screenshot of a web interface showing a selection prompt. At the top, a text box contains the instruction "Please select a site:". Below this is a list box with three options: "Metro General Hospital", "Northside Clinic", and "Southside Clinic". The "Northside Clinic" option is currently selected and highlighted in blue. To the right of the list box is a button labeled "Select".

The screen refreshes to display a header confirming which site was chosen, a Get Available DID button, instructions, and a read-only field for displaying a DID number.



A screenshot of a web interface showing the results of a site selection. At the top, a header displays "Northside Clinic" in a blue-bordered box. Below the header is a button labeled "Get Available DID". Underneath the button is a text box containing the following instructions: "PLEASE READ: Either 'Assign DID' or 'Cancel' must be selected. If the browser is closed after retrieving a DID without making a selection, that DID will be placed on hold and will not be available for future use." At the bottom of the screen, there is a label "DID:" followed by a read-only text input field.

Clicking "Get Available DID" generates a DID number to appear in the read-only DID field, and two buttons, Assign and Cancel, and displayed.

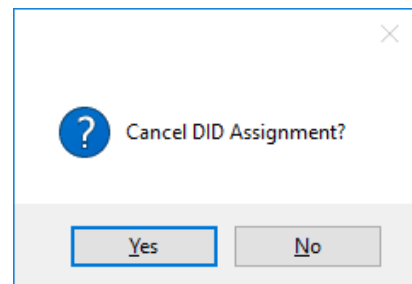


The agent may double-click the read-only field to select it, then press Ctrl + C to copy it. Then, the agent should be instructed to paste (or otherwise enter) the DID into the patient's Epic record.

After assigning the DID to the patient in Epic, the operator should click the Assign DID button in the script. This marks the DID as "In Use" in the underlying database, so that no other agents will receive it when they request an available DID.

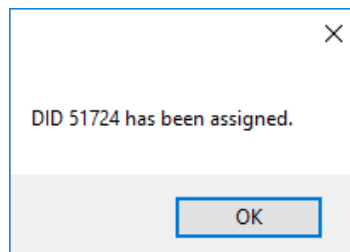
If the DID was retrieved in error, the agent must click the Cancel button. A dialog box appears. The agent must click "Yes" to cancel the DID assignment.

**Note:** If the DID was retrieved in error, the agent must click the Cancel button. Otherwise, the DID will remain "On Hold" until an administrator clears it using the Administration script.



If all DIDs for a site are on hold, an error message is displayed, notifying the operator that all DIDs are being used.

Even if two operators access the script at the same time, or in multiple browser windows, each operator will receive a different DID. Safeguards are in place that make it impossible for a DID to "double up." If an agent tries to assign a DID that is already in use, a "has been assigned" message is displayed.



## Working with the Follow Me Administration Script

The Follow Me Administration script is intended to assist an administrator with any issues that may arise regarding DID numbers, without needing to access the underlying database or run SQL queries.

**DID Status Lookup**

DID Lookup

**View DIDs**

Show:  ▾

From Site:  ▾

**Mark DID Available**

DID  (10-digit number)

**Remove Hold**

DID  (10-digit number)

**Remove Holds by Date**

Remove Holds Longer Than (1)  ▾

### DID Status Lookup

The DID Status Lookup section of the Follow Me Administration script allows an administrator to enter a DID number. Clicking the Get Status button displays the current status of the entered DID: “In Use,” “Available,” or “On Hold.”

**DID Status Lookup**

DID Lookup  [51709] is On Hold

## View DIDs

The View DIDs section of the Follow Me Administration script allows an administrator to select “Available,” “In Use,” or “On Hold” from a drop-down list. Then select a site and click “Show.” A list of DID numbers of the specified status (Available, In Use, or On Hold) from that site will be displayed.

## Mark DID Available

The Mark DID Available section of the Follow Me Administration script allows an administrator to enter a DID number he or she wishes to mark as “Available.” Clicking the Search button will search the IS Patient directory for any patients who are currently using that DID.


If a matching patient was found, a prompt is displayed that says, “This DID is currently assigned to patient,” lists the patient name, and ask if the administrator would like to free up the DID anyway. There are No and Cancel options in case this was done by mistake.

If no patient is found using the entered DID in the Patient directory, the prompt will say, “This DID is not assigned to a patient.” The agent clicks the Yes button to mark the DID as “Available.”

Marking a DID as “Available” will indicate the DID is not “In Use” and not “On Hold” so that it can be assigned again immediately.

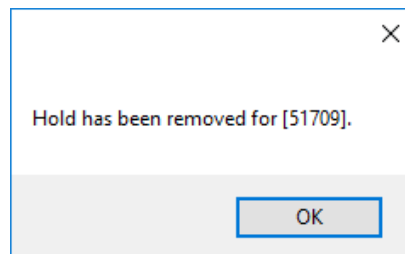
## Remove Hold

The Remove Hold section of the Follow Me Administration script allows an administrator to remove the “On Hold” status from a DID. Clicking the Remove Hold button removes the “On Hold” status from the DID.



The screenshot shows a window titled "Remove Hold". Inside the window, there is a text input field labeled "DID" with the value "51709" entered. To the right of the input field is a button labeled "Remove Hold".

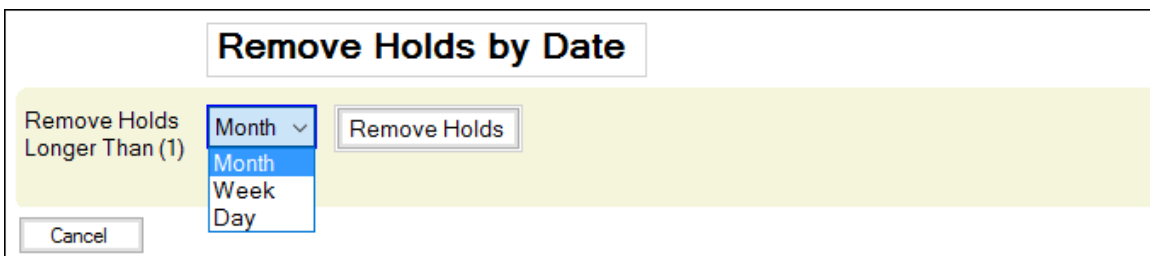
A message is displayed to confirm that the hold has been removed.



The screenshot shows a small dialog box with a close button (X) in the top right corner. The text inside the dialog box reads "Hold has been removed for [51709].". At the bottom of the dialog box is an "OK" button.

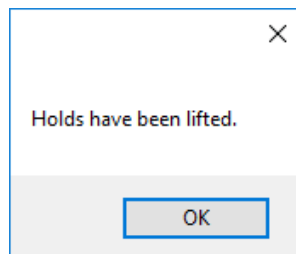
## Remove Holds by Date

The "Remove Holds by Date" section of the Follow Me Administration script is used to remove Holds from any DIDs that have been on hold for more than one month, one week, or one day, based on list selection. This is a tool to free up DIDs that were placed on hold but never had those holds removed.



The screenshot shows a window titled "Remove Holds by Date". Inside the window, there is a dropdown menu labeled "Remove Holds Longer Than (1)" with the following options: "Month", "Week", and "Day". To the right of the dropdown menu is a button labeled "Remove Holds". There is also a "Cancel" button at the bottom left.

A message is displayed to confirm that the holds have been removed.

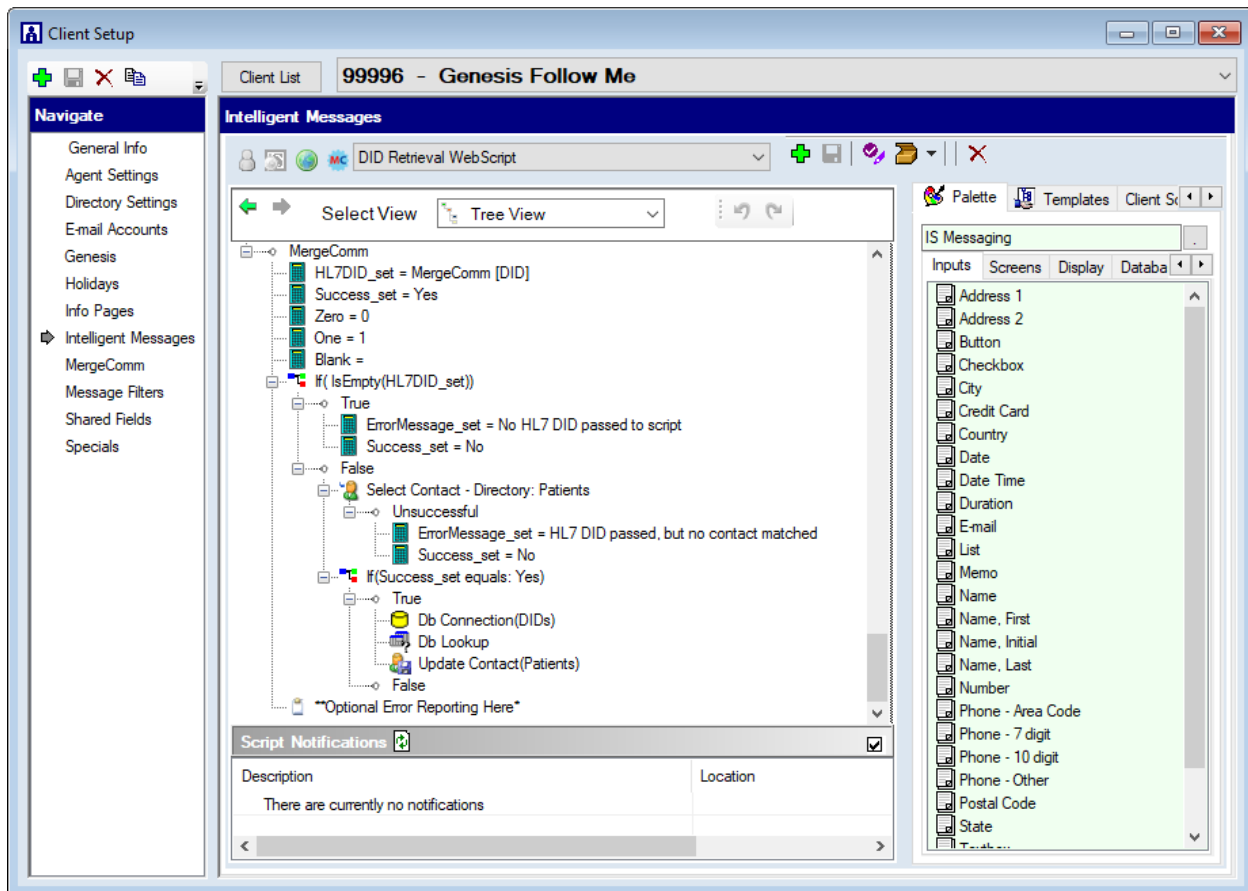


The screenshot shows a small dialog box with a close button (X) in the top right corner. The text inside the dialog box reads "Holds have been lifted.". At the bottom of the dialog box is an "OK" button.

## Script Action Information

The “Script action information” field displays information about the actions that were performed.

## MergeComm Follow-Me



The MergeComm node of the Follow-Me script is an automated script that runs without the involvement of an agent. The MergeComm node requires an HL7 trigger to be configured on the MergeComm page of Client Setup.

More information about configuring an HL7 trigger is provided in the “Client Setup” section of the *Intelligent Series Supervisor Reference Guide*.

When a patient is discharged from the hospital, this portion of the script is triggered by the HL7 Feed to automatically run. It checks to see whether or not the patient had a DID number assigned to them.

If the patient has no DID, nothing needs to be done, so the script ends.

If the patient being discharged did have a DID, the script marks that DID number as "Not In Use" in the database, and also removes the DID from the patient's listing in the IS Patient directory.

**Requirements:**

- Intelligent Series 5.1.6670.29593 or later
- IS Supervisor 5.1.6508.01 or later
- IS Messaging
- SQL Server 2014 Standard Edition or later
- 64-bit Microsoft Windows Server 2012 R2 or later
- .NET Framework 4.5
- Listing Lookup DTMF feature
- Genesis 4.4.2.2 or later
- 64-bit Ubuntu 16.04.2 or later Genesis Server

**Optional:**

- MergeComm
- HL7 licenses
- Soft Agent 5.1.6508.01 or later

**Browser Compatibility:**

- Google Chrome 10.0 and later
- Microsoft Edge 25.10286.0 and later
- Mozilla Firefox 3.6.10 and later
- Apple Safari 5.0 and later

