



TELEPHONE

COMMUNICATIONS

BUSINESS MODEL SOFTWARE TRAINING


+healthTrust
SOFTWARE

Communications: Recommended Training Course Agenda

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how to more efficiently manage the communication functions in the software. The sequence of courses can be changed based on training needs; however the content of each course should remain as stated.

Recommended Course Attendees: Owners, HR, Administrators, and any other Upper Level Management

Estimated Duration: 1 hour 15 minutes

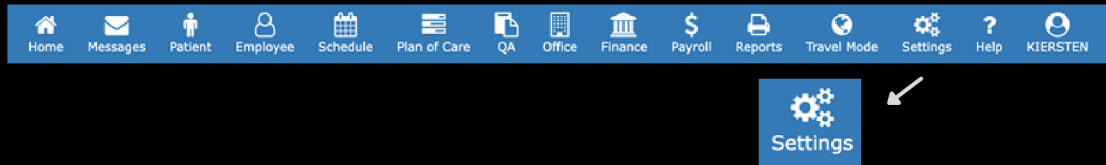
TOPIC	DESCRIPTION	
Setting Up a Domain	Learn how to setup a website domain via the system	20 Minutes
Create a New Email	How to create new email addresses for new users	20 Minutes
Create a New Fax Line	How to create a new fax line for your company	15 Minutes
Send an Email	How to send an email via the system	5 Minutes
Send a Fax	How to send a fax via the system	5 Minutes
Receive a Fax	How to receive a fax in the system	5 Minutes
Process a Fax	How to process a fax in the system	5 Minutes
Receive an Email	How to receive an email in the system	5 Minutes



Setting Up a Domain

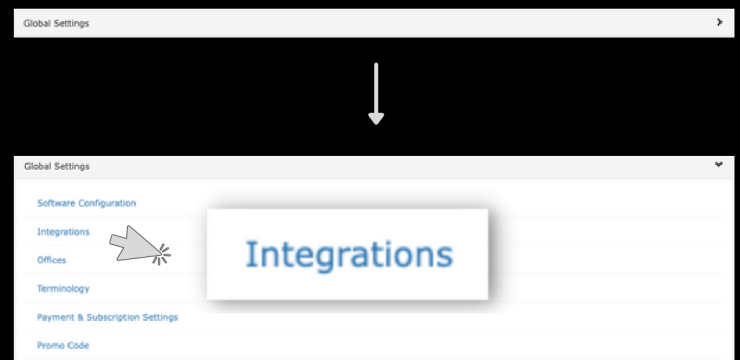
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



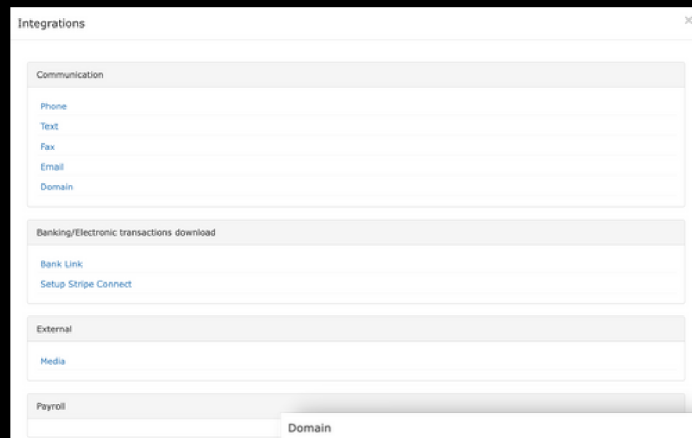
2 Global Settings —> Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3 Click on 'Domain'

- When the Integrations page open, click on the 'Domain' option under Communication.
- A Domain page will open up. Click on 'Add Domain'.



Domain



4 Complete the Form

- Fill out the required fields with the domain information.
- Don't forget to click 'Submit' on the bottom right of the form.



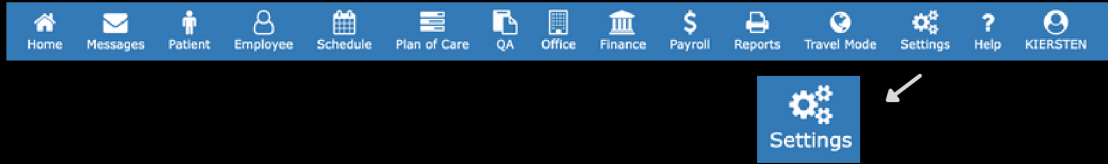
Submit



Create a New Email

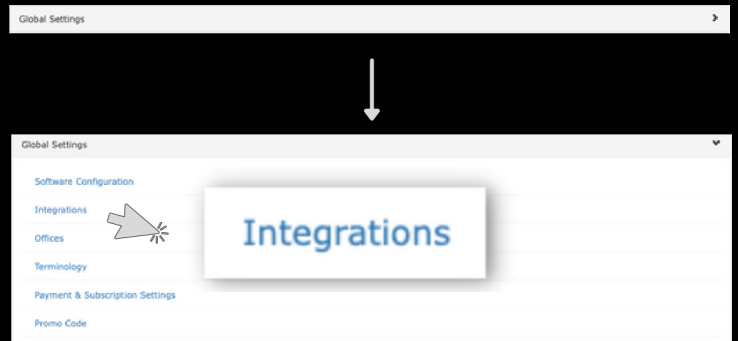
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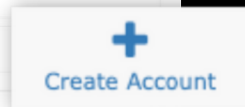
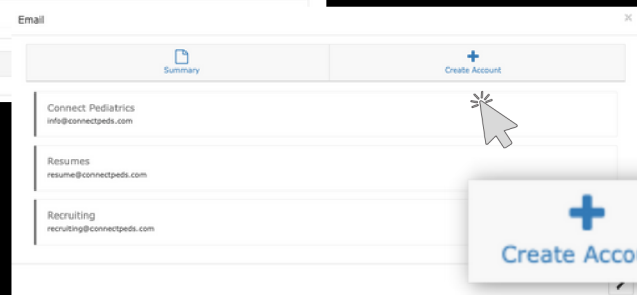
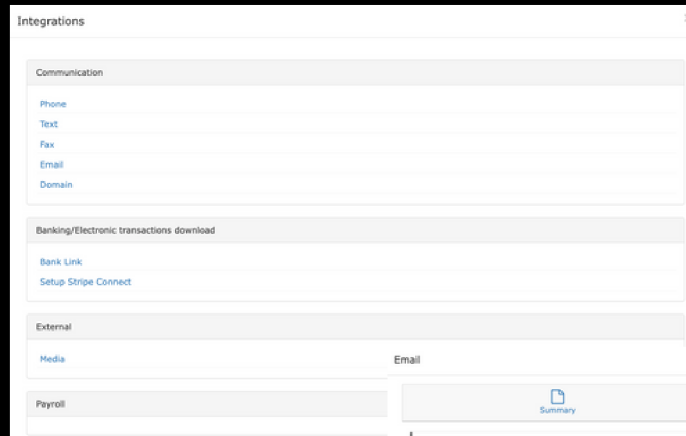
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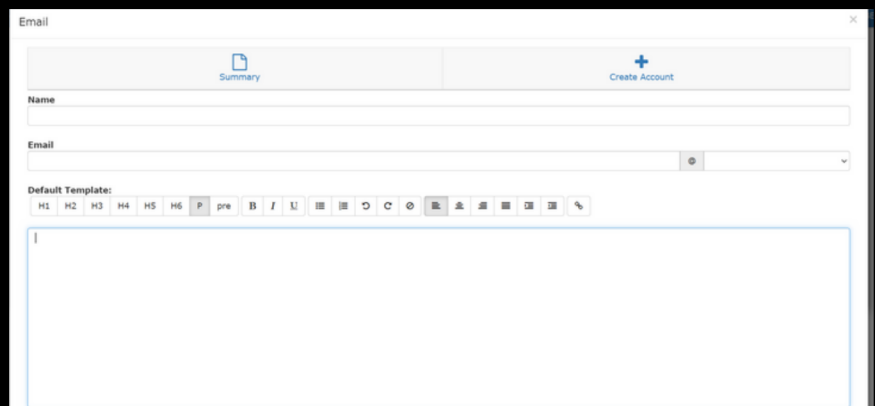
3 Click on 'Email'

- When the Integrations page open, click on the 'Email' option under Communication.
- An 'Email' page will open up with a summary of the existing emails linked.
- To add an account, click 'Create Account'.



4 Complete the Form

- Fill out the required fields with the email information and Limits settings.
- Don't forget to click 'Save' on the bottom right of the form.



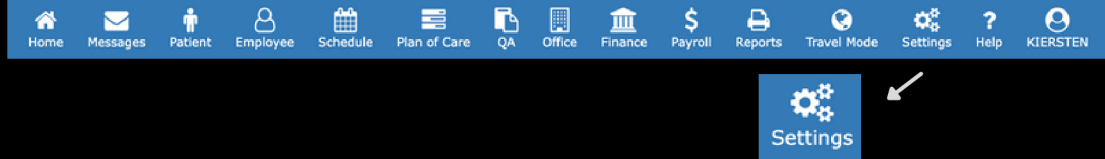


Create a New Fax Line

1

Go to 'Settings' Tab

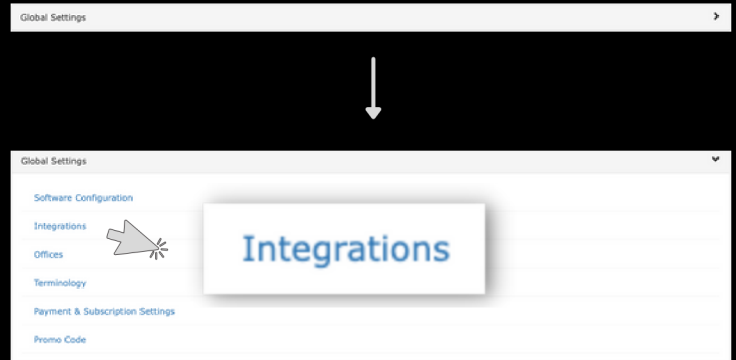
- On your home page, click the 'Settings' tab at the top tool bar.



2

Global Settings → Integrations

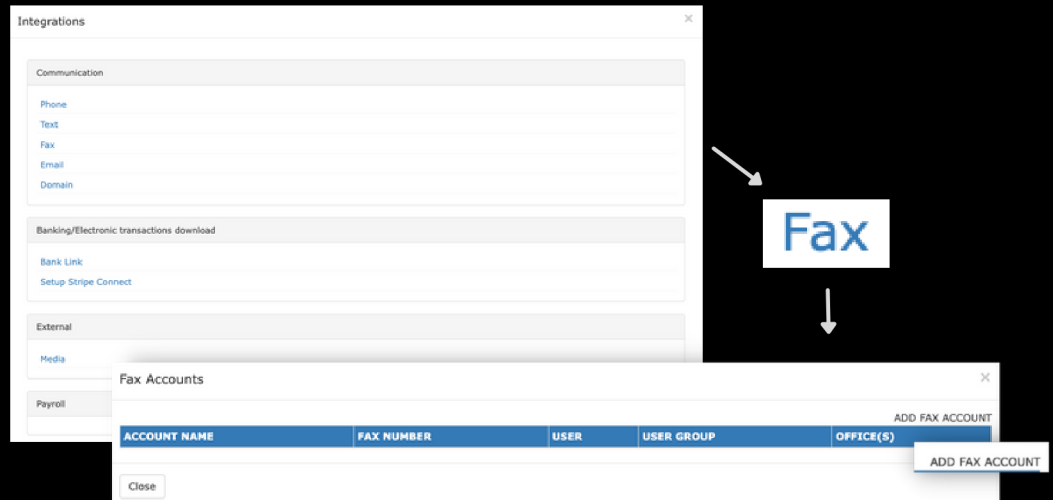
- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3

Click on 'Fax'

- When the Integrations page open, click on the 'Fax' option under Communication.
- A 'Fax Accounts' page will open up. Click 'Add Fax Account' on the far right above 'Office(s)'



4

Complete the Form

- Fill out the required fields with the Fax information and input the Limits settings.
- Don't forget to click 'Submit' on the bottom right of the form.

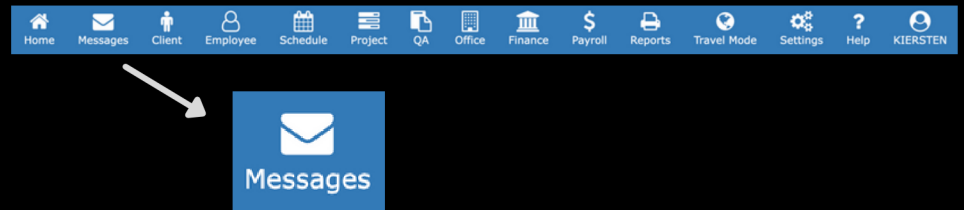
Submit

Send an Email

1

Go to 'Messages' Tab

- On your home page, click the 'Messages' tab at the top tool bar.



2

Create New Message

- To compose a new message, Click the '+' icon on the far right above the search bar.
- A form page will open up.



3

Complete the Form

- At the top left, you will have options on the type of message depending on who it is directed to. If the email is to an internal member of your organization, choose 'Internal'.
- If it is going to a patient or external recipient out of the agency, choose 'Email'.
- From there, you will fill in the correct information for the recipient and input your communication.
- To send, click 'Submit' on the bottom right.

The image shows a 'New Communication' form. At the top left, there are two tabs: 'Internal' and 'Email'. Below the tabs is a 'To:' field with a search icon and a search input field. Below that is a 'Subject:' field. The main body of the form is a large text area for the message. At the bottom right of the form is a blue 'Submit' button. An arrow points from the 'Submit' button in the form to a larger 'Submit' button below it.

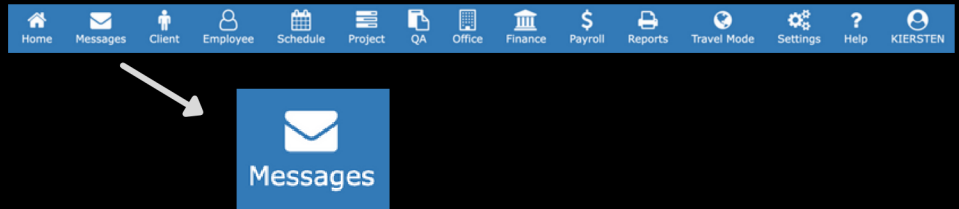
Submit



Send/Receive a Fax

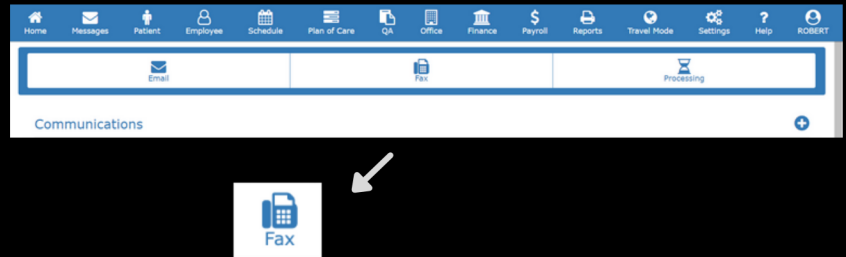
1 Go to 'Messages' Tab

- On your home page, click the 'Messages' tab at the top tool bar.



2 Go to the 'Fax' Section

- Click on 'Fax' option in the sub menu bar.
- It will switch from your emails to the Faxes Page.



3 Navigating the Fax Section

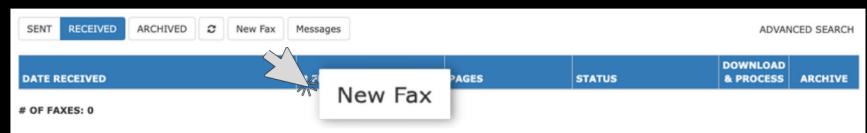
Incoming faxes sent to you

Outgoing faxes you sent

Refresh button to check for new faxes

4 Creating a New Fax

- To create a Fax to send, click on 'New Fax' in the menu bar.
- A form will open up. Complete the required fields:
 - Fax Account
 - From
 - Fax To
 - Fax #
 - Subject
 - Message



Adding an Attachment

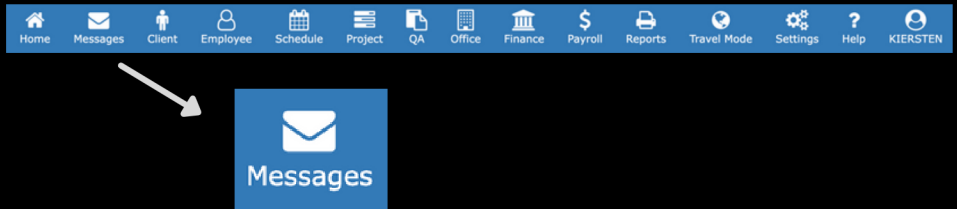
- If you need to share any specific documents in the fax, click 'Choose File' on the bottom left.
- Select the file from your device and upload it.
- Once you have all the fields completed and specific files attached, click 'Submit' to send it.



Process a Fax

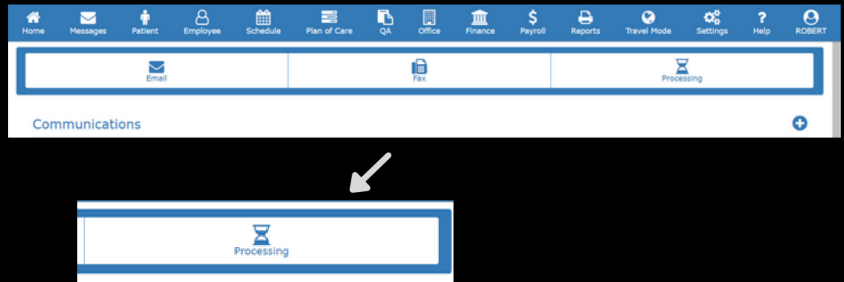
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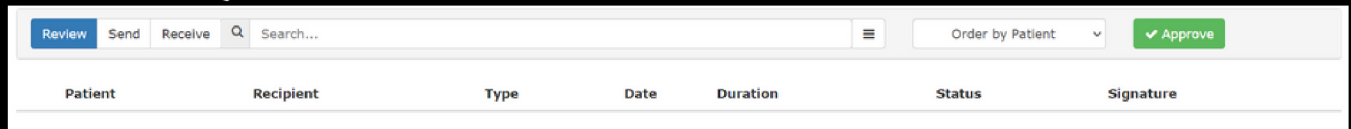
3 Navigating the Processing Section

Sort by faxes you have sent

Sort by faxes that have been sent to you

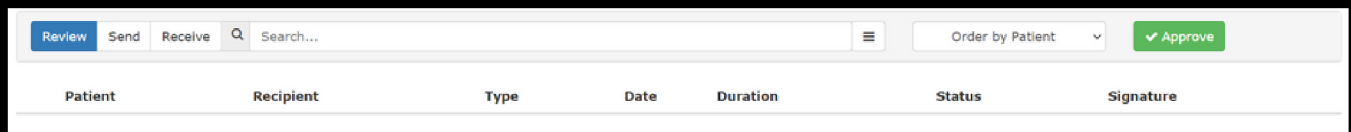
Sort by Order by Patient/Recipient

Review all faxes



4 Select and Approve Faxes

- Select the faxes you would like to process.
- Then select the green 'Approve' button on the right.

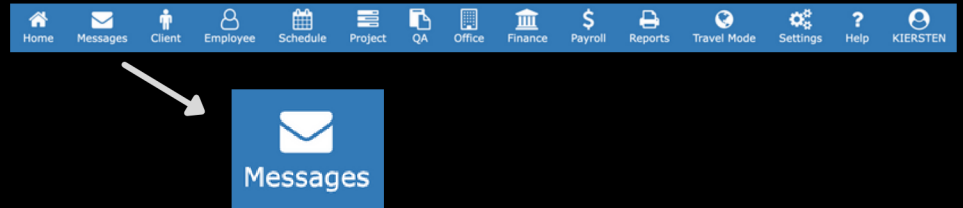


Receive an Email

1

Go to 'Messages' Tab

- On your home page, click the 'Messages' tab at the top tool bar.



2

Go to the 'Inbox' Section

- Click on the 'Inbox' option in the sub menu bar.
- You will be able to view emails that you have received.

