

TELECOM GO LIVE CHECKLIST



TEAMVISION TELECOM TRANSITION SUMMARY

WHAT

Transitioning to TeamVision Telecom Solution, which includes AT&T and Cisco handsets.

WHY

To provide a standard solution that can be supported and managed with our service partners.

PREP SCHEDULE

T-6: We will start preparing 6 weeks out.

	AT&T Cisco Phones	OTHER PLATFORMS Weave, Comcast, etc.
Fax	Coming soon!	✓
SMS	Coming soon!	✓
Transfer	✓	✓
Call Hold	✓	✓
Hold Music	✓	✓
Intercom	Testing	✓
Call Park	Testing	✓
Custom After Hours MGE	✓	✓
Local Management of IVR/Greeting	Coming soon!	✓
Local Management to enable AH Message during Business Hours	✓	✓
Voicemail > Email	Under Development	✓
External Call Forwarding	Under Review	✓
Holiday Hours Menu	Under Development	✓

TEAMVISION TELECOM | HOW IT WORKS

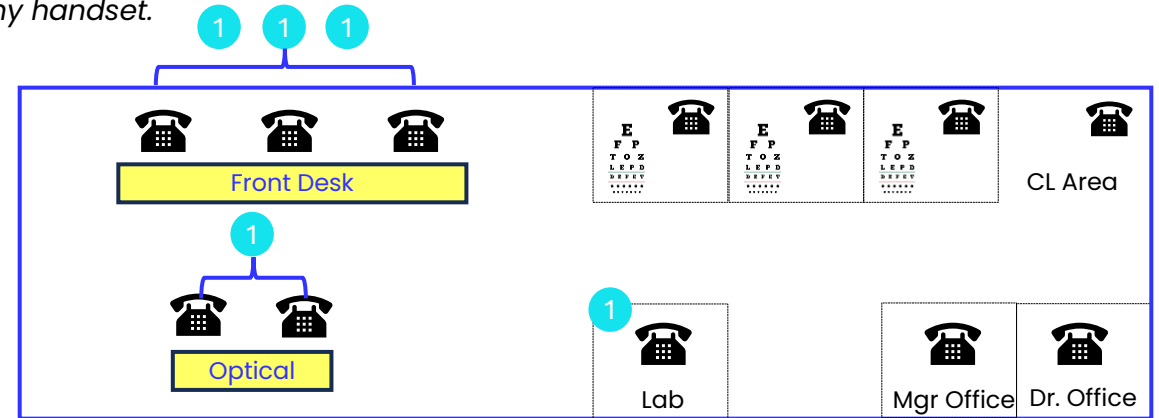
OPTION 1– All designated phones (decided by PM, Field Leaders, Lead OD) will ring all at once. 8x till a single voicemail account. For example, you could have 3 phones, all phones, 2 phones ring – decision by field. VM is accessible from any handset.

Preferred Option



Thank you for calling [insert practice name]. Please press 1 and hold for the next available associate.

Note that any other selection will prompt an 'invalid section and go back into the ring queue'.



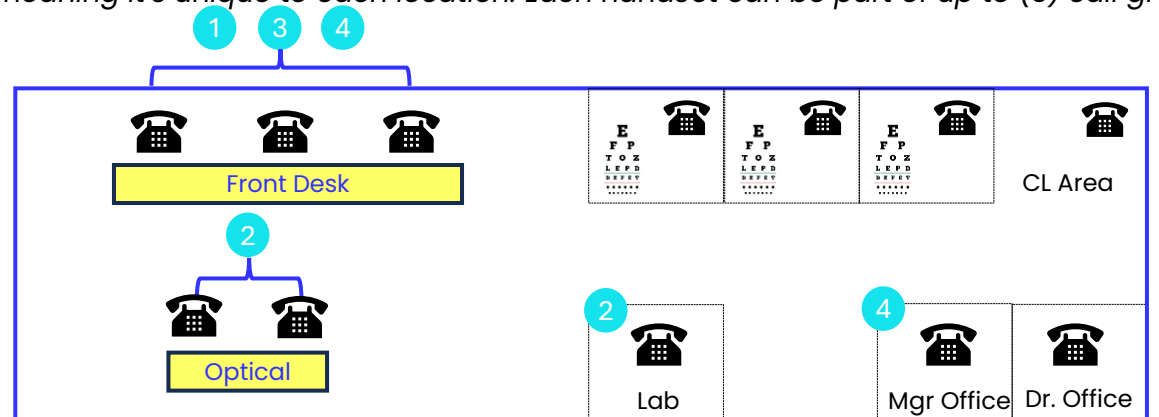
OPTION 2 Phone Tree– Select phones will ring based on selected prompt (decided by PM, Field Leaders, Lead OD). 8x till voicemail – each group has its own dedicated voicemail. Each site can vary with location and # of handsets per ring group meaning it's unique to each location. Each handset can be part of up to (3) call groups (1-4) and VM. All VM's are accessible from any handset!

Less Preferred Option



Thank you for calling [insert practice name]. Please select from the following options:

1. To schedule or reschedule appt
2. For questions regarding glasses or contacts
3. For Insurance or Billing questions
4. All other questions



HOW TO PREPARE

	Action	Notes
6 W TO 4W PRIOR	The PM, Field Leader, and Lead OD will align on: <ol style="list-style-type: none"> 1. The number of handsets needed and call flow. 2. Greetings and messaging (after & during business hours). 3. Existing TeamVision Locations: Consider adjusting your patient flow on your Go Live day to allow the team to complete go-live checklist and learn their new phones (1-2 hours). 	
2W TO 1W PRIOR	Staff to Complete: <ol style="list-style-type: none"> 1. Notify your team of the upcoming changes. 2. Review the Telecom Operations Guide to learn how to use the phones. <ul style="list-style-type: none"> • Note- print copies of this guide and place by phones for Go Live Day 3. Once provided, locate and print extension numbers and place by phones for easy reference. 4. Notify Ops when equipment has arrived. <ul style="list-style-type: none"> • Note- in some cases it may arrive within 24 hours of install 5. Expect new handsets to be placed in a similar location to previous ones- confirm easy access for installer. 6. Existing TeamVision Locations: we will host a prep and training call to minimize any disruptions to your business. 	
GO LIVE	Complete the Go Live Checklist prior to patient care.	

QUESTIONS YOU'LL BE ASKED BY OPS

Question	Answer
Determine existing phone technology and infrastructure: <ul style="list-style-type: none">• Make and model of phones• Tech – Analog, PBX, VOIP• How many handsets and where?	
Call Flow Data: <ul style="list-style-type: none">• What phone numbers ring to site?• How do phones ring? All, Call groups, roll-over lines?• How is VM handled during business hours and after hours?• Any Call Center? Onsite or offsite?• Any 3rd party servicer in place?	
Fax – Intel gathering <ul style="list-style-type: none">• Carrier & Tech info• How many numbers and fax machines• No installation week of integration as this is handled by alternative dept	

GO LIVE CHECKLIST

Important information to Know:

The number of handsets that will ring:

- Option 1 or 2

My temporary phone number is:

- Visible on outbound calls only

My pin code is:

- Provided post instillation

Our site extension are:

- Provided ahead of instillation

All Team Members to Complete Go Live Checklist:

With a partner, call the office on your cell phone and practice using your new phones!

Action	Completed
Located next to the phone, confirm you have: 1. Operations Guide 2. Extension numbers	
Practice accepting calls	
Practice transferring a call to a different department	
Put a patient on hold	
Practice Parking a phone call	
Listen to voicemail(s)	
Know how to get IT support should you need it (SSS or OneLink)	
PM or Key Leader Checklist:	
PM: Test and turn up phones with Ops	
Place a label with pin code on all handsets.	
Confirm all team members have completed their individual checklist above.	

FAQ

How are phones, handsets, and extension determined?

- Handsets are determined by our TeamVision standards along with site specific business needs (i.e., office layout, number of exam lanes, etc.). You may not have a new phone in all places where a phone previously existed (i.e., not like for like).
 - Your layout is shared and reviewed with sites prior to install.
- All TeamVision location assignments begin with 029 (TeamVision Brand ID) followed by clinic ID (ie 023) followed by extension (2200-22xx) – 0290232200 is an example of 10-digi extension.
 - All TeamVision extensions have a Name assigned to it – this is visible beside the 4-digit # (i.e., Reception1)
- In some cases Pomory (outside service provider) will complete cabling for the new phones.

Will my phone number be the same?

- Sites will have a temporary number assigned by AT&T (displayed upper-right of all handsets). It will be reflected as calling number.
 - The locations primary published number with existing carrier is forwarded to the temporary number with AT&T at install to capture all inbound callers.
 - This does not include any rollover numbers or those associated with Google My Business or virtual numbers associated with website handled separately.

Will all numbers be transferred over?

- We ONLY port numbers that are necessary for business or published for sole purpose of clinic operations.
 - Typically occurs 4-6 weeks post integration and updated at handsets accordingly and communicated with the site and programmed to handsets.
- There are no rollover numbers on our network – users can transfer or place callers on hold and toggle between up to 7 calls on the primary line.

How do I get Telecom support?

- Contact SSS at 513-765-2222, 1 for Eng, then 2 for telecom, OR use Onelink in Toolkit.