Atlas Chiropractic System

Calling System – Setup Guide

Backup:

Atlas Integrated Backup is designed to assist users in the data backup process. It is not implied to ensure proper data backup in the event of database corruption or loss. Atlas strongly recommends implementing and maintaining a proper backup system, based on your specific clinic needs. Proper backup consists of multiple database copies, testing backup copies and maintaining backup copies off-site. Mission Critical data should be backed up each day. Consult an IT specialist for assistance.

Customer Support:

Atlas Support personnel are trained specifically on the Atlas Chiropractic Software. On occasion, they are able to assist with general computer support (networking, antivirus, configuration). Atlas recommends that issues outside of the scope of Atlas Support be directed to the appropriate Support professional. A qualified, onsite IT technician can provide you with the most accurate information to resolve your Technical Issues. Atlas Support may be able to assist your technician in resolving issues regarding your Operating System or System Maintenance, to help facilitate the proper function of Atlas.

Support Contact Information:

Mon-Thur: 8am to 7:30pm EST   Fri: 8am to 4:30pm EST

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This manual is designed to explain the features and functions of the Atlas Chiropractic Software, Generation 3. There are some features or functions that will not be available to Generation 1 customers.

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Calling Feature Overview

The Calling System in Atlas is designed to help direct and control the Patient Flow in Chiropractic Offices. Large and small offices can benefit from the proper implementation of the Calling Feature.

When Patients sign into the System, they will be automatically directed to the open Adjusting Table or another location, based on rules and criteria established by each clinic. These rules could include 'holding' a Patient from the Calling Queue for a specific reason, a Special Appointment is required and more. The Calling System also allows instant control over the open Tables to allow 'on-the-fly' configuration.

The Calling Feature is programmed using your Staff's voice (someone from your office will record each Patient name and Table Location) adding a sense of personality and personalization to your System. Proper use of Calling will also allow *more* personal interaction between Staff and Patients, as the Front Desk will no longer have to worry about 'who is next'. Patients will also benefit from calling – instead of spending their waiting time watching for 'their turn' – now they can read a message board, check the latest Chiropractic Journal articles or watch a video presentation in your waiting area and simply 'listen' for their Adjustment.

This guide serves to help clinics new to Calling, to properly configure the first time settings. It also will instruct clinics currently using Calling to properly maintain the system and to understand the advanced functions of the feature.

Equipment:

The Calling Feature requires some basic computer hardware to setup, maintain and function. This equipment includes:

1. **Microphone:** a microphone will be used to record Patient names. A member of the clinic Staff will need to record each Patient name into the database. Although this sounds like a daunting task, it is relatively quick and easy to accomplish – even on large databases.

   Most mid-price microphones from a Computer supply or department store will work. The recordings are generally short and as such, ambient noise during the recording is usually not an issue.

   Microphones are available in standard audio jack or USB plug format – either option will work for this purpose.

2. **Speakers:** your speaker system requirements will depend on your office layout and calling needs. Smaller clinics can use basic PC speakers, centrally located to their Waiting and Adjusting Areas, while larger clinics may have to implement a more complete office solution.

Remember to take a few criteria into consideration when selecting a speaker system:

- Size of your Waiting Area
- Maximum number of Patients in your Waiting Area at peak time
- Other sound sources in the Waiting Area: Patient conversation, background music, video, etc
- Distance from your Waiting Area to an Adjusting Area
- Obstacles between the Speakers and the Waiting Area: hallways, walls, doors, obstructions, etc

The speaker system and layout you choose should be able to easily be heard by Patients in the Waiting and Front Desk area. The following are some examples of optimal placements for speakers.
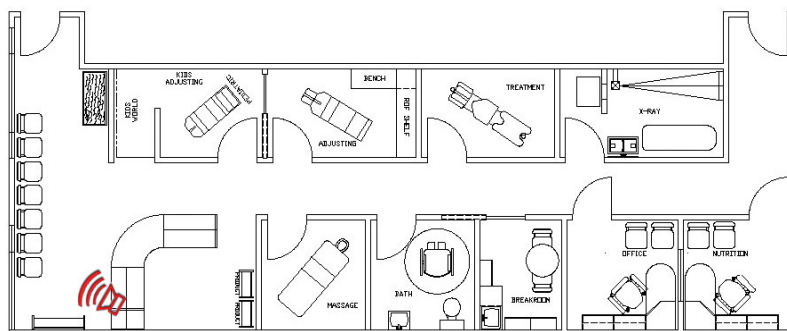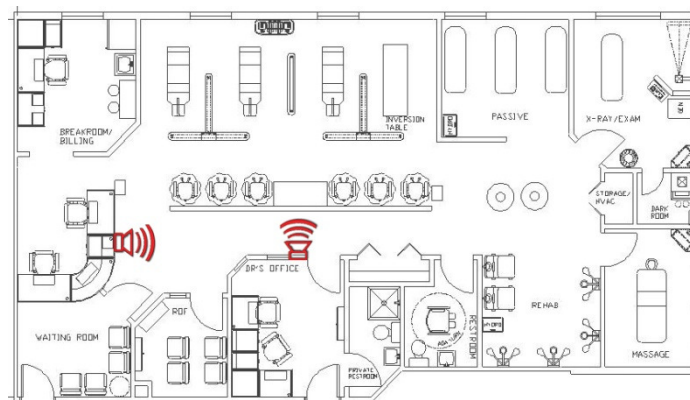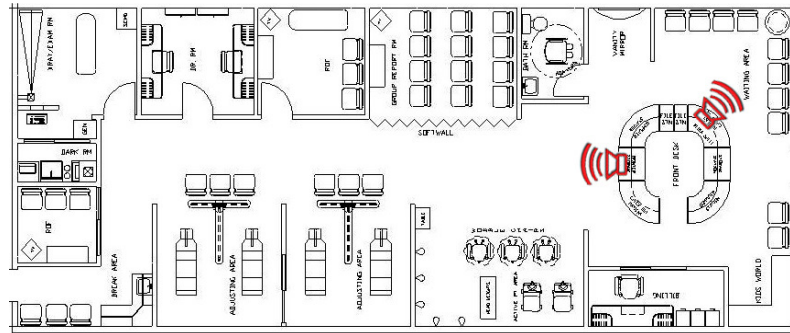
The above images are included only as example and are not implied to reflect an exact setup at any specific clinic. Consult a computer or Sound technician for proper configuration at your clinic.

Recording Names / Recording Rooms:

The second step to properly configuring your Calling System is to record your Patient names and Rooms. Atlas will play your Patients' name along with the sound associated for the available Room.

For example, your Patient name is Mary. You have recorded 'Please proceed to Table One' for the sound file associated with Table One. Mary arrives at the clinic and signs-in at the Front Desk. When Table One is available, Mary will hear 'Mary…Please proceed to Table One'.

Be creative with Room sounds – use different phrases for each table. Remember, this message needs to be easily heard over the din of your Waiting Area. One clinic in Texas uses the phrase 'Git 'er done, at Table One' – catchy and fun.

To Record Patient Name:

NOTE: to properly Record, you must have a Microphone and Speakers configured on the computer you will be working with. The Microphone to actually record and the Speakers to listen to what you have recorded. These do not have to be the speakers you will be using for the actual Calling.

Recording can only be done when the Calling Feature is TURNED OFF.

If the Record Screen closes when you try to record, check that the ASSIGN MODULE is shut off. Check the SETUP ASSIGN section near the end of this manual for more details.

1. ***Open the Patient File***: click FIND and select your Patient from the search menu
2. ***Open the Edit File***: click EDIT when the Patient file is open
3. ***Open the RECORD screen***: in the Patient EDIT file, click the Record button located in the lower, right corner of the screen
4. ***Click RECORD:*** the recording session will begin. Speak your Patient name into the Microphone. Atlas will record input from the Microphone for approximately 4 seconds and automatically stop. Once the recording is complete, you will see a green WAVE line on the screen.

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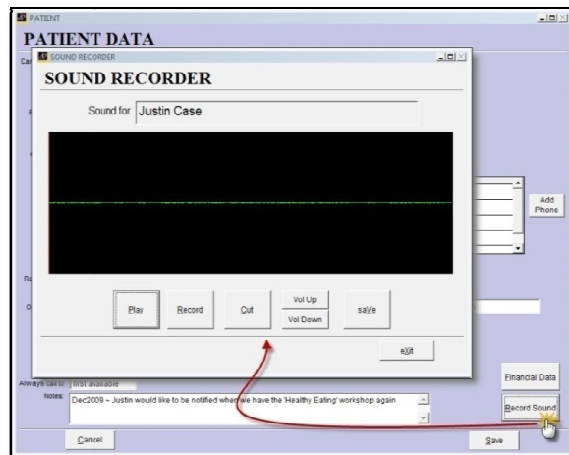
5. ***Check your Recording:*** to verify your recording, click the PLAY button and listen to the file playback. You can use the Vol Up and Vol Down buttons to adjust Volume levels
NOTE: be sure not to adjust Volume levels to drastically up or down – very quiet or very loud recordings should be re-recorded once you have made changes to your Microphone setup.
You can also CUT (clip) a section of the Sound File – select the portion you would like to Cut by left clicking where you would like to start and dragging your mouse to the end. This will highlight the selected area in white. Then click CUT to remove that section. This is helpful to eliminate dead-space in short recordings. Be careful not to Cut (clip) too much of the file.
6. ***Save the File:*** once you are satisfied with the recorded name, click SAVE and Exit the screen

The quickest way to record Patient names is to select the day you would like to start using the Calling Feature. Begin recording Patient names on that Day Schedule. This will help ensure you are recording active Patients' and you are working to eliminate the most interruptions on that day. Work through your schedule from that day forward; remember you only have to record a Patients' name once. However, each Patient will have to have their own name recorded.

Take Privacy Laws and Patient Confidentiality into consideration when recording. Many clinics opt to record only First Names and Last Initials; some use only First Names. If a Patient prefers to be called by a short name or a nickname, consider using that instead.

To Record Room Sounds:

NOTE: to properly Record, you must have a Microphone and Speakers configured on the computer you will be working with. The Microphone to actually record and the Speakers to listen to what you have recorded. These do not have to be the speakers you will be using for the actual Calling.

<p align="center">Recording can only be done when the Calling Feature is TURNED OFF.</p>

If the Record Screen closes when you try to record, check that the ASSIGN MODULE is shut off. Check the SETUP ASSIGN section near the end of this manual for more details.

1. ***Navigate to the Room Setup Screen:*** the setup screen is located:
Setup > Initial Setup > Rooms
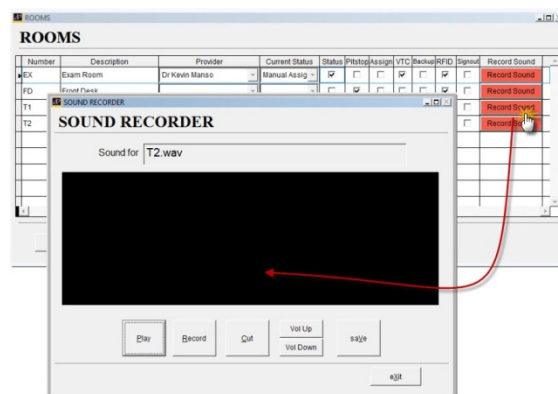
2. ***Click the Record Sound button:*** this will open the Sound Recorder window
3. ***Refer:*** refer to steps 4, 5 and 6 in the Patient Record directions above

   NOTE: Be sure to SAVE before you Exit the Sound Recorder

   The Record Sound button will turn green when a sound is recorded for each room.
   It is not necessary to record Room Sounds for Rooms or Computers Patients will not be called to – i.e. Front Desk, Sign In, Server, etc.

Check Room 'Current Status':

NOTE: while you are recording the Room sounds, check the Current Status of each Room to ensure Patients are directed to the appropriate Rooms (Tables). Also check the option box 'Status' to be able to view and manipulate the Room Status from the CHA and VTC screens.

Select the Current Status by clicking the EDIT button and choosing from the drop down list.

Each Room (Table) a Patient can be called to, must be configured with a Provider
The Provider selected will be used to automatically log into the VTC
The Provider can be changed 'on the fly' at the VTC if necessary

Status Options:

- ***Available:*** selected Room is open – Patients can be automatically assigned to this Room
- ***Assigned:*** Room has a Patient already Assigned to it – this is a System option and should not be selected by users
- ***In Use:*** Room has a Patient Signed In to it – this is a System option and should not be selected by users.
- ***Not Available:*** selected Room will not have Patients assigned to it – use this for Front Desk computers, Exam Rooms (unless you need Patients auto assigned there), Servers or Adjusting Tables where you don't want Patients auto assigned.
- ***Reserved:*** locks the selected Room (Table) from automatic Calling. Reserved Rooms are available for Patients to sign-in to, but Patients will not be assigned to this Room.
   (see Managing Calling section).
- ***Manual Assign:*** selected Room is available but will not have Patients automatically assigned – the CA can manually assign a Patient to this Room and the System will Call that Patient.

Configure the System Settings:

The next step to implementing the Calling Feature of Atlas Software is the proper configuration of the System Settings. This includes 'turning on' Calling, setting up Families for proper calling and appointing the Control Computer.

First, we will open the System Information window and turn on Calling.

Setup > Initial Setup > System Settings

Once inside the System Settings window, navigate to the Assign/Sign-In/Sound tab.

- **Computer calls Patient to Table:** this is the Master Switch to turn on or off the Calling Module. Click the box to put a check and enable Calling.
- **CHA acknowledges Assign:** this option will require the Front Desk to approve (by mouse click) each Patient assignment before it will actually call.
- **Check for Patient to Assign Every:** option configured in seconds – sets the timed cycle for the software to check the list of available Patients to call to tables. Atlas recommends 10 seconds, which is a good balance between speed and network strain. A lower setting will increase the strain on the database and possibly the network.
- **Display Sign-In Messages For:** sets the time interval (in seconds) to display Pitstop Messages on the Sign In screen for Patients. Other Patients can Sign In when messages are displayed, however it will then immediately remove the previous message.
- **Delay from Sign-In to Assign:** sets the time interval (in seconds) from when a Patient Signs In at the Front Desk to when that Patient is Assigned to an available room. This option is designed to

allow Patients to move from the Sign In area to the Waiting Area. An example would be a delay to allow Patients time to remove and hang coats before being called.

- **Delay from Post Adjustment to Assign:** sets the time interval (in seconds) from when a Provider Posts and Adjustment at the table to when the next Patient is called to that table. This option allows time for Patients in at the table to gather belongings, leave the adjusting area, etc before the next Patient arrives in that area.
  When this option is set, the VTC will display for the selected time before clearing to the Sign In.
- **Signout Clears the Room:** this option is used in conjunction with a feeder-room system where the Patient card/fob must be swiped again to clear the room and allow calling.
- **Use Feeder Rooms:** this option turns on the system for use in a feeder room setup.
- **Show Next Appointment on Sign-In:** this option can be set exclusive of the Calling Feature to display a Patients next Appointment when they Sign-In at the Front Desk.
- **Assign Patient to Any Table:** this option is used in multiple Provider offices to allow Patients to be called (assigned) to any available Providers table. By default (option unchecked), Patients will only be assigned to their Default Provider tables.
- **Always Call Parent when Calling Family:** linked Families can be assigned to the same table. This option will use the Parent name when directing the Family to a table. By default, the first Family member to sign-in at the Front will be the Patient called – directing the entire Family to the table. This option will be enforced *even if* the Parent does not Sign-In. We would recommend recording the 'Parent' name as a Family name when using this option.
 Ex: instead of recording 'Mary' as the Parent, record 'Smith Family'

After setting these options, it may be necessary to restart the Main Application and the Assign Module.

Managing the Rooms:

When using the Calling Module, there are options to control the Calling Flow from the CHA Screen. The current Room (Table) status is located along the bottom of the CHA screen. This area reflects a list chosen in the Rooms Setup screen (refer to the heading 'Check Room Current Status' in the Recording Names / Recording Rooms section). This is also available on the VTC screen, located in the lower right corner.

NOTE: on the VTC, a Provider can only see the Rooms (Tables) they are currently logged in to by default.
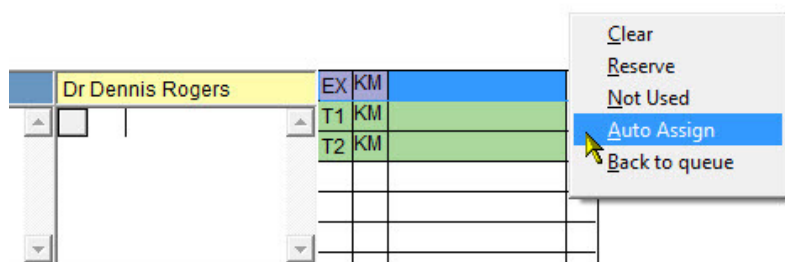
In the above example, there are three Rooms configured for Patient Calling. The color coding is designed to help identify the Current Room Status at a glance.

- *Purple: MANUAL ASSIGN* (noted above for the EX Room)
- *Green: AVAILABLE* (noted above for T1 and T2)
- *Dark Grey: NOT USED*
- *White: RESERVED*

NOTE: the Room Code is located in the left side box. Our image above shows the EX (Exam Room), T1 and T2 (Table 1 and 2). The initials next to each Room Code represent the Provider currently logged in at that Table.

To change the Room Status, Right Click on the empty cell adjacent to the Provider initials.
In the popup menu select the new status or action.

- *Clear:* Removes the Patient name in that Room. Use this for Patients who were not Posted properly by the Provider.
- *Reserve:* puts the Room in Reserve mode (see details in previous section)
- *Not Used:* puts the Room in Not Used mode (see details in previous section)
- *Auto Assign:* this option is available if the Room is currently set to Manual Assign – this opens the Room to automatic assignment. Available Patients will be assigned to this Room.
- *Manual Assign:* this option is available if the Room is currently set to Auto Assign – this closes the Room to automatic assignment. Available Patients will *not* be assigned to this Room.
- *Back to Que:* sends the Patient assigned or signed in to this Room back to the Queue (waiting list)
  The next Patient in line will be called to that Room.

When a Patient has been 'assigned' to a specific Room using Calling, the Patient name will disappear from the Queue and appear in the Room Status box highlighted in YELLOW. Once the Patient Signs-In at the Table (using their card or keychain fob) the highlight will change from Yellow to RED.

This will help the Front Desk know, at a glance, who is in a Room and who should be going to a Room.

**Managing the Patient Que (CHA Screen):**

As Patients arrive into the office and Sign-In, their names will move off of the Daily Schedule and into the appropriate Queue (Waiting List). The number located to the left of the Patient name indicates how long the Patient has been in the Que. If you do not see this number (it may be replaced with a letter code or just be blank) the Patient is on HOLD. The options outlined in this section and in the section 'Configure Calling Rules' will help users manage Patients in the Que.

There are a few options available to help staff manage the Que. Refer to the 'Configure Calling Rules' section for details on the automated management features available (hold, special directs, etc)

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- Patients can be moved within the Queue (up or down) by left clicking on the white box located to the left of the Patient name. A double-ended arrow will appear allowing you to drag the name up or down in the Que. The Calling System looks to the Patient at the top of the Queue when calling.
- Users can also right click on a Patient in the Queue and 'Hold' that Patient from Calling. This will stop Atlas from assigning the Patient to a Room. You will notice the number near the Patient name will disappear using this option.
- Left click on Patients who are on 'Hold' and select RELEASE. This will put a number next to the Patients' name indicating how long the specific Patient has been in the Que. Released Patients will then be available for Calling based on their position in the Que.
- Users can also benefit by the feature to left click on a Patients' name in the Queue to open that Patient Profile. This will help staff quickly access Patient Information if necessary.

Managing the Patient Que (VTC Screen):

Some of the same options available from the CHA Screen are available on the Providers in the VTC Screen. The Patient Queue is not visible from the VTC by default. However, the Room Status is indicated in the lower, right corner of the screen. This displays all of the Rooms the Provider is currently logged into: who is assigned to the Room and who is Signed-In to the Room.
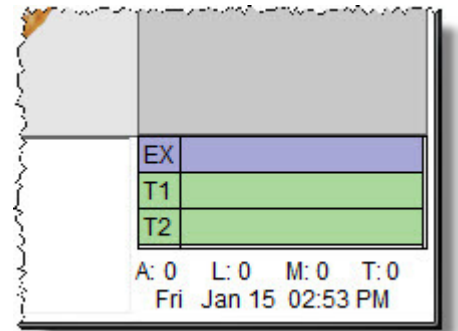
Providers can press F10 on their keyboards to access their own Queue of Patients. The Patients in the Queue can be moved up or down, however the Provider does not have the ability to Remove or Hold a Patient in this Queue from the VTC. This Queue can then be hidden by pressing F10 again.

The options available in the Room Status area include:

- Right clicking on a Room to change the Current Status
- Right clicking on a Patient name in the Room Status to send that Patient Back to Queue (an option also available once the Patient signs-in at the Table using the Touchpad button) or choosing to Clear a Patient name
- Left clicking directly on a Patient Name to load the Patient VTC Profile – this is useful if a Patient doesn't sign-in with their card/fob and eliminates the need to manually search the Patient

The VTC Room Status also shows which Patient has been assigned to a Room (highlighted in Yellow) and which Patients have signed-in to a Room (highlighted in Red), just like in the CHA Screen.

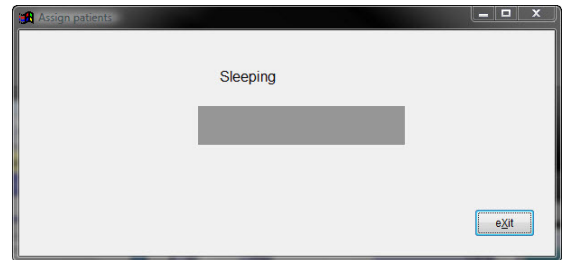## Configure / Start the Assign Module:

The Assign Module controls the Calling Feature. It is a small application, included with Atlas, which needs to run on the computer designated as the 'Calling Computer'. The Calling Computer is the one with the speakers attached. Refer to the section on Equipment for more details on setting up speakers.

To properly configure and launch the Assign Module:

1. ***Create Shortcut:*** create the shortcut onto the user Desktop for quick access to launch the application.
    - Open the computer Network
    - navigate to the main Atlas database computer
    - open the ACS folder
    - find the file assign.exe
    - right click on the file and choose the option to 'Send to Desktop…Create Shortcut' : this will create the shortcut automatically for you on your local desktop

2. ***Launch to Start Calling:*** double click on the application shortcut to launch and start the Calling System.

    The application alerts 'Sleeping' until it actually scans for or is assigning a Patient – this is normal.

    Users may also see a green 'sound' file in this box.

    To properly CLOSE the Assign Module, click on the EXIT button. Assign must be properly closed each day to ensure proper functioning of the Atlas software.

Testing the Calling Feature:

The final step in setting up and configuring the Calling Module, is testing.

1. Start Atlas at the Front Desk – be sure your Rooms are Available for Calling
2. Ensure the 'Calling Computer' is turned on and the speakers are working
3. Start the Assign Module on the Calling Computer
4. Choose a test Patient – be sure you have recorded a sound for that Patient
5. Sign the Patient into the System – note if the Patient is 'on hold' for any reason
6. Listen for Calling – take into consideration any delays you programmed
    You should hear the Patient name and Room over the speakers
    You should also see the Patient name move from the Queue to the specified Room (highlighted in Yellow)
7. If this doesn't work, refer to this manual for assistance

Configuring Calling Rules:

It is possible to assign 'Rules' to certain situations that occur during Patient Sign-In, to help the software direct the Calling System. This includes putting specific Patients on 'hold', directing specific Patients to a specific Table or Room and taking manual operation of the Calling System.

Holding Patients:

Holding a Patient from the Calling Queue, stops that Patient from being automatically directed to an available Table. 'Holds' can be done manually by the Front Desk staff or pre-configured.

- *Manually Holding Patients:* the easiest way to Hold a Patient is manually.
  Once the Patient has 'arrived' into the System, their name will appear in the Provider Queue. Right-click on the Patient name in the queue and choose HOLD. Notice the number beside the Patient name changes to a code or blank. This indicates the Patient is on HOLD. To Release this HOLD, right click on the Patient name again and choose RELEASE. Notice a number reappear.
  NOTE: The number indicates how many minutes the Patient has been in the queue.

- *Appointment Types:* Patients can be placed on Hold because of their specific Appointment Type for that day. Ex: Patient arrives for an XRay and shouldn't be automatically directed to the Adjusting Table.

 Setup > Initial Setup > Appointment Types

In the Appointment Type configuration screen, we are going to focus on the HOLD checkbox. To place the 'hold', simply check off Hold on the Appt Type screen.

When a Patient Signs-In for a '12 Week Exam' Appointment (in the above example image) they will not be called to a Room. Instead, they will appear in the Queue, with the code '12' next to their name. This will indicate they are 'on hold' for their '12 Week Exam' appointment. The same scenario will apply to the 'Anniversary Exam/Con' appointment; except now the Patient would appear
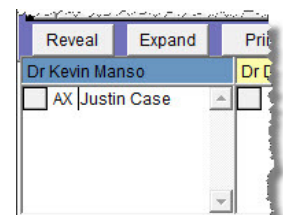
in the Queue with the code 'AX' (the Queue can only accommodate the first two characters of the Appointment code).

This method of 'holding' will carry over to the System Settings screen.

Setup > Initial Setup > System Settings

In the System Settings window, open the Pitstop Tab to access a similar Appointment Type setup box. Notice the column labeled 'Hold Q' and how it corresponds to the column 'Hold' from the Appointment Types screen. Changes made to either screen will sync in both places.

It is very important to ensure that changes you make are correct, as they will affect other areas of the software.

- *Pitstops:* Patients can also be placed 'on hold' when they receive specific Pitstop messages. This can be when they receive Personal Pitstop messages or when they automatically receive a Pitstop based on the System Configuration. We will quickly review the Pitstop option in this section; focusing on how to setup the Pitstop to 'hold'; however, to understand Pitstops, refer to the Atlas User Manual.

  To create a Personal Pitstop, open the specific Patient file and click on the PITSTOP button. When setting up the Pitstop message click the option 'Hold In Queue'. This parameter will reflect in the Pitstop schedule with a check in the cell 'Hold'.

To link a Pitstop Message to an Appointment Type (ex: to alert a Patient they have a specific Appointment when they sign-in) navigate to the System Settings window.

Setup > Initial Setup > System Settings

Under the Pitstop Tab, access the Appointment Type setup box (as we did the the previous topic). However, this time, click on the Edit Message Types button to Add or Edit Pitstop Messages and configure the 'hold' option for each.

These Pistop Message Types (Templates) can be applied to certain situations; such as Appointments, Patients who arrive Early or Late or without an Appointment at all (walk-ins). To learn how to configure and apply these Pitstop Messages, refer to the Pitstop section of the Atlas User Manual.

For the purposes of this topic, we will focus on the Hold option when configuring the Message Type.
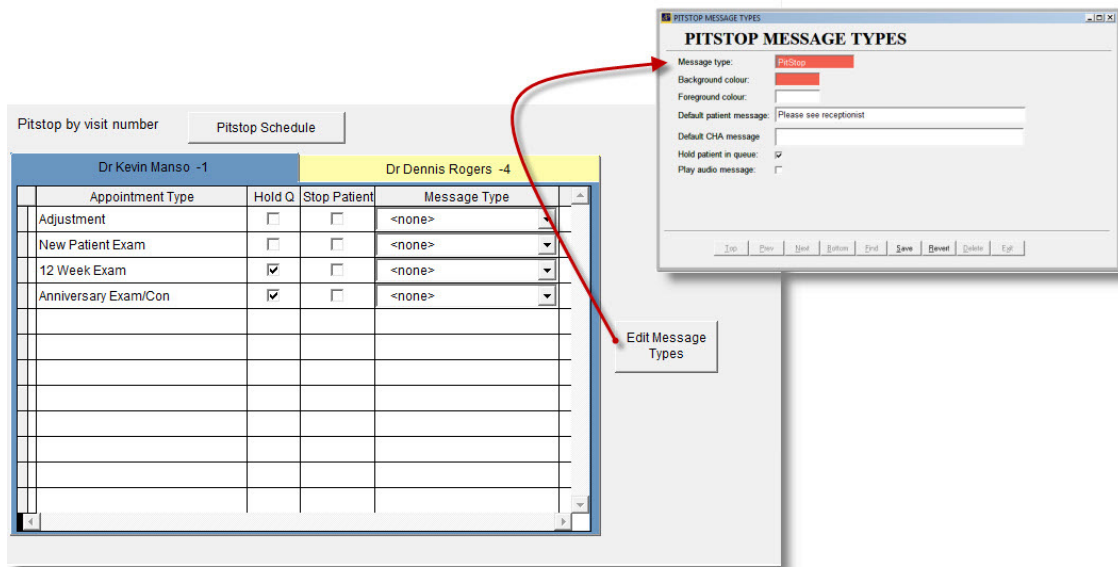
For example, a Message Type is created to alert a Patient when they sign-in without having an Appointment scheduled (walk-in). This Message Type is configured to HOLD the Patient from Calling. This benefits the Front Desk by ensuring that Patients with Appointments stay on schedule and that 'walk-in' Patients are not negatively affecting the office flow. These 'walk-in' Patients can then be 'released' into the Calling Queue as required.

> **NOTE:** *any HOLD placed on a situation takes precedence over any option to NOT HOLD. This means that if the Appointment Type is not configured to HOLD a Patient, but the associated Pitstop Message Type is configured to HOLD a Patient – the Patient will not be called until released.*

The third Pitstop option is to schedule Pitstops by Visit Count. This option can be accessed by navigating to the Pitstop Schedule using the button located above the Appointment Type setup box in System Settings (the same screen can also be accessed through Setup > Pitstop Schedule from the CHA screen). Choose the option 'Hold' when configuring a Pitstop per Visit.

NOTE: If you associate a Pitstop Message, configured to Hold, with a Pitstop by Visit that is not configured to Hold – the Hold option takes precedence.

More details on properly configuring and using Pitstops can be found in the complete Atlas Chiropractic User Manual.

Releasing Hold Status for Patients:

When a Patient arrives into the clinic – their name moves from the Appointment Matrix into the appropriate Provider queue. Beside the name is a number indicating how long (in minutes) the Patient has been in the queue. If there is a HOLD condition on the Patient for any reason, this number is not displayed. The number area is replaced with an Appointment Code or a blank space. This indication is the only way to know if a Patient is on HOLD.

To release this HOLD condition, Right-Click on the Patient Name in the queue and choose the option RELEASE. This will replace the Appointment Code or blank spot with a number (indicating how long the Patient has been in the queue) and set that Patient to be Called as available.

Automatically Assign to Specific Table:

The Atlas Software also has two options for automatically assigning Patients to a specific Table or Room. This will help direct Patients with special requests or specific Appointment Types to Tables, enabling a smooth flow in the office.

- *Patient Specific:* to configure a specific Patient to a specific Table or Room on each visit, access that Patients' profile. Notice the option near the lower, left corner 'Always Call To:' – click on that to open the selection window.
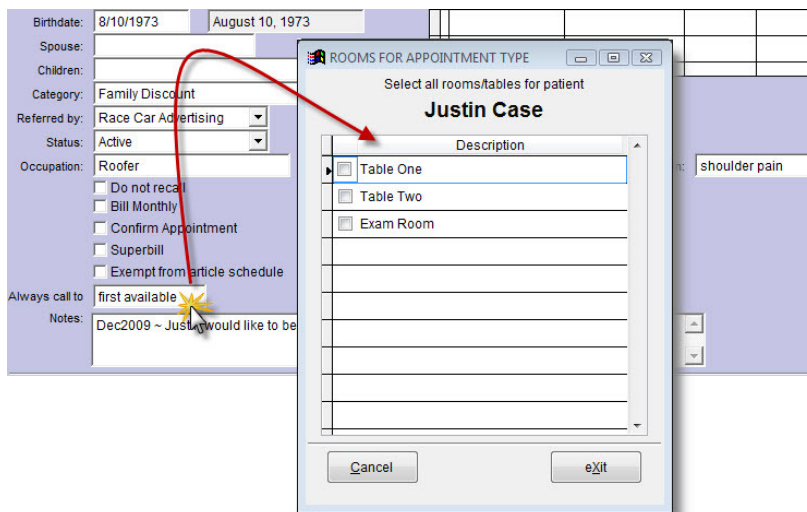

Click on the desired Table (Room) from the menu – only one Table or Room can be selected for a Patient. This option will be effective each time the Patient signs-in:

NOTE: The Patient will be called to the selected Table based on availability. The Patient may be called after other Patients (out of order) if the Table (Room) is not available.

- *Appointment Type:* to configure Atlas to direct Patients to a specific Table (Room) when they arrive for a specific Appointment Type, navigate into the Appointment Type setup.

Setup > Initial Setup > Appointment Types
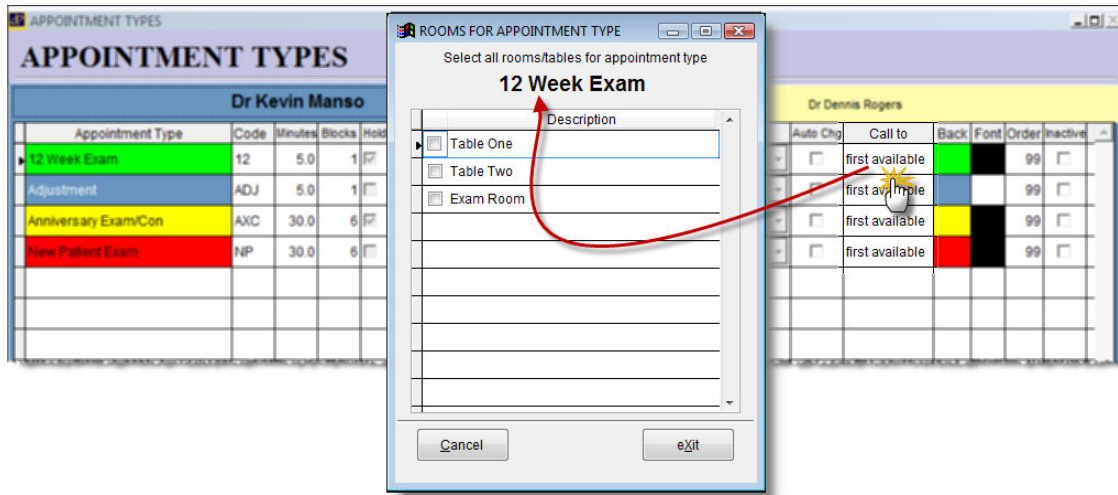
In the Appointment Types screen click on 'First Available' under the Call To: column. Choose the desired Table (Room) to have Atlas automatically direct Patients to when they Sign-In for the specified Appointment.

NOTE: The Patient will be called to the selected Table based on availability. The Patient may be called after other Patients (out of order) if the Table (Room) is not available.

Manual Assign Prompts:

Atlas will prompt a User for verification to Manually Assign Patients if the Patient or the Table (Room) does not have a sound recorded.

For example, Patient Julie Case has not been into the office lately. Staff has not recorded her name into the software. Julie stops in one day without an Appointment. There is no 'hold' configured for walk-in Patients at this office. She Signs-In and Atlas attempts to direct her to the available Table One. Since Julie has no sound recorded, Atlas cannot process the Calling. It will prompt to Manually Assign Julie…

There are a few steps required to properly configure this feature.

1. Designate a Computer to receive the Manual Prompt Window: in the Rooms setup screen (Setup > Initial Setup > Rooms) designate *only one* Room (Computer) to be ASSIGN. This designation means the chosen Computer (usually Front Desk) will receive the prompt to Manually Assign Patients without sound recorded (see Image).
The Confirm Assign window will appear on the 'Assign' Computer only when Manually Assignment is required.

2. The Room (Computer) marked as 'Assign' can be different (and usually is) from the Computer actually doing the Calling (the one
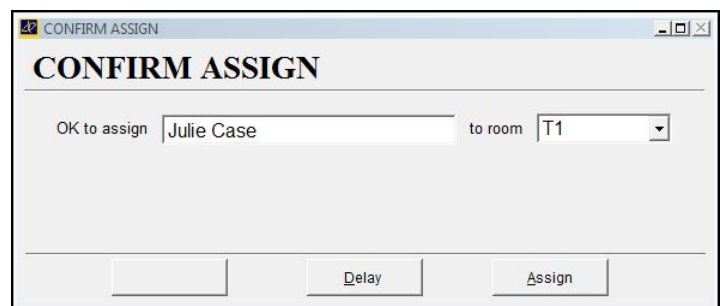
with the speakers connected)

3. When the Confirm Assign prompt appears, the CA can choose to:
DELAY: this does not assign the Patient to a Room, instead it leaves the Patient in the Queue and will prompt again.
ASSIGN: choose the correct Room to direct the Patient to (use the drop down menu) and click Assign to 'send' that Patient to that Room.

NOTE: when using Manual Assign, no sound will be heard – the Patient will have to be directed to the Room by Staff. However, Atlas will indicate which Room the Patient was directed to the Room Status area on the CHA screen and VTC.

Troubleshooting the Calling Module:

Issue	Check
No Sound – Patients are NOT appearing in the Room Status area in yellow	• Check if ASSIGN is running – restart Assign • Check if Patient(s) are on Hold – release holds • Check if Rooms are Available – make Available • Check if there is a Prompt on the PC designated for Manual Assign – acknowledge the Prompt • Check if Calling Module is turned on in System Settings – check box to turn on
No Sound – Patients ARE appearing in the Room Status area in yellow indicates Calling is working – Patients are being assigned – sound is the issue	• Check connection between speakers and PC designated to perform Calling • Check volume levels on Calling PC • Check speakers are turned on
Patients being called out of order	• Check Hold status of Patients in queue • Check specific Calling Rules for Patients and Tables (call to specific table option) • Check Patients haven't been manually shifted in queue