Call Management System at Michigan Peer Review Organization (MPRO)
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Industrial and Operations Engineering 481

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EXECUTIVE SUMMARY

Currently the Michigan Peer Review Organization has many ways in which to reach one of its employees. However, frequently when clients and MPRO employees attempt to reach an MPRO employee, the telephone routing becomes extensive. Often a caller is forwarded four or five times before reaching their desired person. This presents a poor image of MPRO for their clients, and also frustrates the entire organization. Another aspect of the current situation which is frustrating to some MPRO employees is that since the switchboard must be continuously staffed from 8:00am until 5:00pm, several employees must leave their own work to substitute for the receptionist during lunch and two breaks. The purpose of this project was to analyze the current receptionist situation, including the switchboard, staffing of the receptionist position, and call routing.

Many areas were explored during the course of this project. These include the Human Resources issues, information flow, the role of technology, current telephone equipment, and public relations issues. It was necessary to incorporate many areas into the study, since the receptionist position has widespread impact.

It was discovered that the equipment in place at MPRO is more than adequate for their needs. This conclusion was drawn after repeated calls to MPRO as well as meeting with their telephone consultant, Ann Lindscheid. The telephones themselves have many helpful features and are easy to use. Also, the current telephone technology in place is quite sufficient to handle MPRO’s needs. In addition, the menu options and voice mail systems are very user-friendly. However, though the equipment and technology could meet MPRO’s needs, there is a lack of knowledge and understanding about how to use the features properly.

Next it was necessary to quantify the telephone traffic through the switchboard. This was done with log sheets, which distinguished calls originating externally or internally. These log sheets recorded the time of a call to the switchboard (dial “0” from the auto-attendan) and the destination to which the call was routed. The resulting average calls per hour to the receptionist was 3.8 calls. Additionally, nearly 30% of these calls were being routed directly to a department which the caller specifically requested (HCQIP, I.T., etc.).

As a result of the discovery of the low call volume to the receptionist, the human resources aspects were investigated. These include other receptionist duties, other MPRO employees’ (who substitute for the receptionist during breaks) duties, etc. The receptionist does have a few more duties in addition to routing calls. In the receptionist’s job description, it states that the receptionist is responsible for receiving and directing visitors, sorting the mail and receiving packages. However, it was also discovered that these tasks were not time
consuming. A minimal quantity of mail required sorting, visitors ordinarily entered into the 40500 building instead of the 40600 building where the receptionist is housed, and packages came three to four times daily.

From a public relations standpoint, it is important to MPRO to have a person available if a customer would prefer to have a live person route their call. This is also a pertinent issue when dealing with visitors to MPRO. It is important to convey professionalism and customer service.

The role of technology in this telephone “system” is also quite important. Besides the actual telephone technology, there is existing technology which would facilitate the flow of information throughout the organization, therefore expediting the process of reaching the caller’s desired destination. GroupWise is available at MPRO for email, scheduling, and document management. However, GroupWise is almost exclusively used for email. If the two other major features of this software were utilized by MPRO employees calls could be more efficiently handled. For example, if employees used their schedulers, at the very least blocking out times when they will not be working, taking lunch breaks, or in meetings, calls would not be routed to that employee’s desk. Also, the document management feature should be used to share documents such as an updated list of employees with their office numbers and telephone numbers, and also an updated list of current projects / contracts and several contact people for each. This would facilitate proper call routing to employees who have a sufficient knowledge of a topic to meet the caller’s needs.

Lastly, the location of the receptionist was examined. Currently the receptionist is located on the second floor of the 40600 building. However, since the board room and conference rooms are located on the second floor of the 40500 building, most visitors come directly to 40500 when visiting MPRO. As a result of this, there are often visitors wandering around the second floor of 40500 without direction.

After learning about all of the issues involved with this situation, the project team developed a tree of options which could be implemented by MPRO. Of these options, two were more thoroughly investigated by the project team. These are essentially to redistribute the calls from the auto-attendant to a pickup group (composed of the receptionist and three to four other employees) which could then be answered by any of those employees. This eliminates the need for the receptionist to be tied to the receptionist’s desk, which allows the receptionist to make photocopies, run brief errands, etc. Also, the implementation of a new menu system on the auto-attendant, adding departments which are most frequently called. This will facilitate and expedite the call. The receptionist should also be moved to the 40500 building, in the open area at the top of the front (east) stairs. At this location the receptionist could more properly greet visitors and help prepare for large meetings.
Also included in this project are some smaller, crucial implementations. These will aide in information flow, customer service and satisfaction. These include building directories at the entrances, more complete utilization of the GroupWise software, and use of telephone (equipment) functions available.

The following report outlines in depth the current situation, the team's methodologies, findings, and recommendations.
INTRODUCTION:

Purpose of the project

The purpose of the project was to optimize the call management system at the Michigan Peer Review Organization's (MPRO) Plymouth office. This includes proper and timely routing of calls and satisfaction of customers, board members and others calling MPRO. A consensus needs to be achieved among MPRO employees and those impacted by the work for the new or revised system. All key constituents and staff also need to be involved in the decision of any new or revised system. A call system training manual has been developed for employee use. Revisions to the system and any new equipment needs to be fiscally responsible.

Background

The Plymouth office consists of two buildings, one building houses the administrative area on the second floor (40500 Building) and the other houses the majority of the employees on both floors (40600 Building). Currently the 40600 Building also houses the main reception area, which is where the main switchboard is located. There is also other traffic through the main reception area, such as mail, deliveries and visitors. Recently there have been temporary employees working at the main reception area. Numerous professionals cover a wide range of roles at MPRO. The support staff is also fully extended, in terms of their work duties, so it is difficult to find people to man the switchboard when it is necessary, such as breaks, lunches and vacations.

Currently, to reach a person at MPRO, the caller must (See Appendix A for a flow chart)
- Call the switchboard (459-0900)
  - Use the alphabetical listing
  - Enter the extension
  - Have the switchboard operator route the call
- Use employees' direct in dial (DID)
- Call the departmental secretary

We focused on correctly routing calls that come in through the switchboard operator because we felt the problem was there. If the number of calls coming in to the switchboard is reduced, then the problem of having someone tied to the desk at all times is eliminated.

Factors that we considered
- The position of the receptionist
- The call system and the switchboard
- The location of the receptionist
- Staffing issues
- Information flow

APPROACH AND METHODOLOGY

Data Collection:
A log of all incoming phone calls was kept for one month (See Appendix B for a copy of the log sheet used). The log counted all phone calls in half hour intervals and there was a distinction between external and internal calls. Data was collected on when calls came in and where they were directed. The calls were then entered into a spreadsheet, see Appendix C for a summary of the results.

Interviews:
Interviews were conducted with the following people. An outline was followed during the interviews, see Appendix D for a sampling of questions that were asked.
- Sheryl Stogis, CEO of MPRO
- Carli Meister, COO of MPRO
- Jean Poet, Administrative Assistant
- Ann Lindscheid, Telephone Coordinator
- Members of the clerical staff who cover the receptionists breaks
  - Joanne Kovacs, Administration
  - Judy Hausch, Medicare
  - Nancy Tadajewski, Medicare
  - Carol LeDuc, Medicare
  - Cheryl Haas, Medicare/PDC
  - Clare Thomas, Behavioral Health
  - Jeri Knowles, Behavioral Health
- Current Receptionist from Snelling Temporary Agency
- Sherry Beck, Manager of Communication and Public Relations
- Judy Hayden, Director of Business Development
- Gwen Miller, Review Manager for Behavioral Health
- Margaret Belton, Director of Medicare
- Cheryl Gutowski, Retrospective Manager for Behavioral Health
- Jill Cooper, Manager for Coverage for State Government
- Katherine McClure, Information Technology
- Mike Lawler, Information Technology
- Pat Headley, Human Resources
- Jane Ellen Innes, Information Resource Center
- Jeanette Marshall, Information Resource Center

We also spoke with both the postal carrier and the UPS delivery person.
CURRENT SITUATION

Currently the receptionist is located in the 40600 building. She is responsible for manning the switchboard, greeting visitors, accepting deliveries and sorting mail from 8 am to 5 pm. She takes one fifteen minute break in the morning, one in the afternoon and an hour lunch. During this time someone else must cover her duties because the switchboard needs to be manned at all times. When she is on vacation or sick someone must cover her duties all day. Currently there are seven members of the clerical staff who cover breaks and lunches on a rotation. They must leave their regular jobs to do this.

FINDINGS AND CONCLUSIONS

From our data collection and the interviews we conducted we made the following conclusions.

- Current telephone system is capable of doing everything necessary
- The way the system is being used needs to be modified
- Receptionists time is not being efficiently used
- The volume of calls coming into the switchboard is low (average of about 4 per hour). The figure 1 shows the average number of calls during each half hour interval. Please see appendix C for a summary of the data collected on incoming phone calls

![Average number of calls in 30 minute increments](image)

Figure 1: Average number of incoming calls in thirty-minute intervals

- Volume of mail is not very large (about 1/2 bin to 1 bin a day), this does not include mail that is delivered to the first floor of the 40600 building
- Few visitors come into the main reception area because almost all meetings are in the 40500 building and there are no signs directing visitors to the reception area
- Location of receptionist is not effective
- Method of switchboard coverage needs to be modified

ALTERNATIVES CONSIDERED

The alternatives that are available to MPRO are described in this section. It is advised to go through this description with a copy of the option tree (see Appendix E) in order to facilitate comprehension.

It should first be noted that there are presently three different ways to get a hold of an employee at MPRO:
- Use the employee’s Direct In Dial number
- Call the department’s secretary
- Call the switchboard (459-0900)
  - Use the alphabetical listing
  - Enter the extension
  - Have the switchboard operator route the call

The option tree has been created in order to outline all the possible options available to MPRO.

Most of the issues that have arisen throughout the course of this project have not dealt so much with the position of the receptionist or the phone system itself. In fact, the problem lies with the fact that the current menu system routes too many calls to the switchboard operator. This results in the fact that she is always tied to her desk. This also results in requiring other people to man the desk in their absence.

Starting at the top of the tree, the first choice that has to be made is whether or not to expand the current menu system, or to abandon the auto attendant completely and have all the employees start using Direct In Dial numbers only.

If the current menu system stays the way it is:
- The receptionist will still be tied to the desk in order to answer the phone, however it is recommended that call forwarding and pick-up groups be utilized. This would allow her to perform other duties, and lessen the amount of time other people spend filling in for her during breaks and such.
- Some of these other duties might include keeping an updated list of current MPRO employees, making sure that voice mail, GroupWise scheduling, call forwarding, and pick-up groups are being used properly.

If the current menu system is expanded, the menu system will state, for instance, to dial 2 for Behavior Health. The call will be routed to Behavioral Health which
will have a *Pick-Up Group* programmed into their phones. A pick-up Group
means that there are 3-5 people within that department that will be responsible
for picking up that line if it rings. Please see the Future State Menu Chart for
more details.
- There will be fewer calls for the receptionist to deal with and as long as pick-
  up groups and call forwarding is implemented, then she will have more time to
  perform other duties and others will not have to fill in for her breaks.
- Her resources are increased so that it is easier for her to locate someone
- The receptionist should receive proper computer and telephone training, and
  also administer that training to new MPRO employees
- Expanding the current menu system also implies that zero receptionists is a
  viable possibility.

The other option that exists would be to gradually turn off the auto attendant
- The position of the receptionist is no longer mandatory
- The need to find a replacement is eliminated
- Must put up signs and directories to help visitors find where they need to go

The next decision to be made is whether or not to have a receptionist. If the
current menu system is expanded, then a receptionist is not really necessary.
However, it might be a good idea to keep her. Since she is no longer tied to the
desk, she will be able to do more things, and it would be nice to have someone to
greet new visitors. If the current menu system stays, then you must keep at least
one receptionist. Her role will not change much except for an increase in her
resources. She will still be tied to the desk, and someone will still have to fill in
for her when she is gone.

If the receptionist stays, then the options of hiring two part timers to fill the
position or the option of hiring someone to fill a hybrid position of receptionist and
Help Desk Operator also exist. Two receptionists that share the job would be
suitable because they could fill in for each other when it was necessary.
Examples of such situations include vacation and sick time. The hybrid position
might be a solution that would combine the duties of the receptionist with the
duties of a help desk operator. This option has not been examined thoroughly
due to time constraints, but it has been made aware to us that they are having
difficulty answering the IT help line at times. It is for this reason that we have
included this as a possible option.

The option of moving the main reception area also exists if the receptionist stays.
Other possibilities include the corporate office, and also the first floor of building
40600. The benefits of moving include:
- Direct and greet visitor traffic as well as redirection of “the wanderer”
- Help with meeting set-ups
- More central location
RECOMMENDATIONS

The following are changes to be implemented regardless of which solution is used

- Make use of GroupWise Scheduler
  All employees should keep their schedule on GroupWise current and as detailed as they feel comfortable being (numbers of where they will be, where they will be, etc.). Everybody should have at least the following on scheduler:
  - Hours they plan on being at work (when they come in and when they leave).
  - Times they will be out of the buildings
  - Times they will be in meetings

Employees need to allow at least the people in their department access to view their schedule, so fellow employees can at least tell people looking for the employee when they are expected back. GroupWise also allows users to keep multiple schedules open at the same time, this is called the multi-user function. This will allow employees to keep schedules open for anyone who has their calls forwarded to them. Appendix F for guide to using the GroupWise scheduler

- Current Voicemail messages
  Employees should regularly change outgoing voicemail messages (very easy) to reflect the current date and mention any large periods of time they plan on being out of the building. This will let callers know that employees do check their voicemail and if they leave a message the employee will receive it.

- Call Forwarding
  Have your calls forwarded to someone if your phone is busy or unanswered. Callers will have the option of leaving a message or being forwarded to the person you have chosen. Calls should be forwarded to someone who is aware of what you are doing and will be able to answers questions. See Appendix G for a guide to using many useful functions available on the phones used at MPRO.

- Formation of Pick-up groups
  A pick-up group consists of multiple employees, when a caller calls the department the phone will ring at all of the members' desks. The telephone indicates that the call is coming into the pick-up group number and not their personal number.

- Directory listing and Signs
  Signs need to placed by the entrances of both buildings directing visitors to the receptions area, board room and each of the departments. See appendix
H for a prototype directory and map. MPRO could also purchase special cases to place their directory in. See Appendix I for pictures and prices of possible directory boards.

- Protocol for answering phone
  Whoever is answering the main switchboard number (receptionist or pick-up group) should follow the same protocol for answering the phone. This will allow MPRO to maintain the high level of professionalism need to serve their broad range of customers. See Appendix J for telephone etiquette procedures.

While there are many possible solutions (see Alternatives considered), we have chosen two solutions we feel will best serve MPRO. One is to expand the current menu system and have one receptionist and the other is to expand the current menu system and not have a receptionist.

Solution 1: Expanded menu system and one receptionist

- The current phone menu is expanded. The new phone menu will contain no more then nine choices and 0 will still allow the caller to a speak with a live person. The menu will be ordered frequency calls going to that specific department. See Appendix K for a future call routing flow chart.

- The main reception area is moved to the 40500 building, so the receptionist can better serve visitors. New furniture could also be purchased for the new reception area, but this is not necessary. See Appendix L for pictures and prices of possible new furniture.

- A pick-up group is used, but the receptionist is part of the pick-up group and is expected to pick up the phone on the first two rings if she is at her desk. If the call is not picked up in the first two rings members of the pick-up group know that they need to answer the phone. This will eliminate the need for the receptionist to be tied to the desk.

- The receptionist is given other specific duties (typing, filing, making coffee, data entry, etc.). This will help ensure the receptionists' time is used efficiently.

- Mail and packages can still be delivered to 40600 building. The receptionist would be responsible for sorting all of the mail and packages, and bringing the deliveries for the 45000 building to the building.

- Receptionist is responsible for performing periodic checks to make sure all employees schedules on GroupWise are current and their calls are being forwarded correctly. See Appendix M for a possible maintenance schedule.
- Receptionist should be trained in using GroupWise and Voicemail system, so she can answer questions for employees. Both information technology and the telephone consultant should train her.

- Responsible for maintaining current list of all current contracts and people involved with them. This list should be made available to all members of the pick-up group so calls can be forwarded correctly. This list should be kept using the document manager function on GroupWise so all employees can have access to it.

- Receptionist should be given access to view all employees schedules on GroupWise.

Solution 2: Expanded menu system and no receptionist

- The current phone menu is expanded. The new phone menu will contain no more than nine choices and 0 will still allow the caller to speak with a live person. The menu will be ordered frequency calls going to that specific department. See Appendix K for a new call routing flow chart.

- A pick-up group is formed to answer calls coming into the switchboard number, they will only have to answer calls when the caller presses "0". The pick-up group will consist of certain members of the clerical staff that currently cover for the receptionist. When a caller presses "0", the call is automatically forwarded to the pick-up group. The phone will indicate that the call is coming into the switchboard number, so whoever picks it up will know that it is a switchboard call.

- Mail and packages are delivered to a specified area (most likely the old reception area). A rotation is formed for mail sorting, this could be the same rotation that is currently used to cover the receptionist.

- Someone in the organization will be given the task of making sure all employees are keeping their schedule on GroupWise current and that their call forwarding is working properly.

CONCLUSION

It is worthy to note that someone should be appointed to implement anything MPRO chooses to do. If the organization decides to keep the position of the receptionist then she would be a likely candidate. She should be trained by someone in IT on the computers, including the full functionality of the GroupWise Scheduler. She should also be trained by the telephone consultant on the full functionality of the phone system. It would then be her job to train new employees on these functions as they arrive. It is important that everyone in the
organization utilize these features in order to maximize the success of the new system. It would also be beneficial if she checked how these items are being used by other employees on a periodic, rotational basis.

If MPRO decides to eliminate the position of the receptionist, then someone else needs to be appointed to handle these action items.

At the very least, the critical implementations should be seriously considered. These would drastically improve several situations at MPRO. Telephone calls could be more easily and efficiently routed, visitors could be directed more easily, and clients could be served better, overall. However, with the additional implementation of one of the core recommendations the situation will improve further. The majority of these recommendations can be instituted at little or no cost, thereby best serving both MPRO and its clients.
Appendix A
Appendix B
Directions: Please indicate (with a check mark) the frequency of each type of phone call during each time period. I is for Internal calls and E is for External Calls.

<table>
<thead>
<tr>
<th>Type of Call</th>
<th>8:00 to 8:30</th>
<th>8:30 to 9:00</th>
<th>9:00 to 9:30</th>
<th>9:30 to 10:00</th>
<th>10:00 to 10:30</th>
<th>10:30 to 11:00</th>
<th>11:00 to 11:30</th>
<th>11:30 to 12:00</th>
<th>12:00 to 12:30</th>
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</thead>
<tbody>
<tr>
<td>Routed to Medicare (HCQIP)</td>
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<td>Routed to Medicare (PEPP)</td>
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<td>Routed to behavioral health</td>
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<td>Routed to State Government</td>
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<td>Routed to Information Technology</td>
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<td>Routed to Jean Poet/Joanne Kovacs</td>
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<td>Question Answered by Receptionist</td>
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<td>Time</td>
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<td>Event 3</td>
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<td>4:00 to 4:30</td>
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<td>4:30 to 5:00</td>
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- **Routed to Medicare (HCQIP)**
- **Routed to Medicare (PEPP)**
- **Routed to behavioral health**
- **Routed to data**
- **Routed to State Government**
- **Routed to Information Technology**
- **Routed to Jean Poet/Joanne Kovacs**
- **Routed to Specific Person (note the name of the Person)**
- **Routed to Call Center**
- **Question Answered by Receptionist**
- **Other (specify)**
Appendix C
## Data From Log Sheets

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<th>Day</th>
<th>Date</th>
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<th>9:00-9:30</th>
<th>9:30-10:00</th>
<th>10:00-10:30</th>
<th>10:30-11:00</th>
<th>11:00-11:30</th>
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<th>12:30-1:00</th>
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<tbody>
<tr>
<td><strong>Source</strong></td>
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**Standard Deviation**
- 6.808
- 3.14
- 7.294374

**Average**
- 29.85
- 5.1
- 34.95

**9 hrs per day**
- 3.883 calls per hour average
Calls from 2/22/00 to 3/21/00

Origin of calls to switchboard

Internal
15%

External
85%
Destination of calls routed to switchboard

- 13% HCQIP
- 9% PEPP
- 1% B. Health
- 2% St. Gov't
- 3% I.T.

72% other
(These calls were routed to a specific person)
Appendix D
Telephone System:
- What is your extension number?
- What is your direct in number?
- On a scale of 1 to 5 rate the ease of use of (6- don’t know how to use)
  - checking voicemail
  - changing voicemail messages
  - transferring call
  - Reaching desired person at MPRO
  - Sending group voicemail
- How do you reach someone inside MPRO (circle all that apply)
  - through the receptionist
  - direct dial
  - use extension
  - look them for them
  - send them email

Receptionist
- What is the receptionist’s role
- How do you think the switchboard should be covered when the regular receptionist is absent?
- How often do you cover for the receptionist
-How much mail do you get and how (specifically) does it get to you?

Computer
-Do you use scheduler on Groupwise?

-To what level
  -I block off days I'm not in
  -I block off times I'm not in
  -I write specifics about where I am and where I can be reached

-Ease of use of the computer (1 to 5) 6-don't use

You and your department
-What hours did you work yesterday?

-What method of communication is used within your department
  phone
  email
  notes
  personal visits
  other:

-How do you receive people that are coming to visit you?
Appendix E
Option Tree

Expand Menu System

Turn off Auto Attendant and use DID only

Current Menu System

1 Receptionist

2 Receptionists

0 Receptionists

Don't move

move

Don't move

Don't move

Don't move

move

Don't move

Don't move

move
**MPRO GroupWise Calendar Training**

**Responsibilities:**
- Train all current/new MPRO employees on the following GroupWise features:
  - Scheduling Group and Posted Items
    - Scheduling an appointment (pg. 42)
    - Canceling an appointment (pg. 43)
    - Checking when everyone's available (pg. 45)
    - Accepting/Declining scheduled items (pg. 51)
  - Scheduling Recurring Appointments
  - Scheduling Auto-Dates by Dates (pg. 54)
  - Calendar
    - Viewing your calendar (pg. 63)
    - Reading/Saving an item in your calendar (pg. 66)
    - Viewing the schedules of multiple users (pg. 66)
      - Giving rights to all MPRO employees (read-only)
      - *In order to facilitate call routing, keep open at all times your schedule, the schedule of people for whom you are the backup, other people to whom you often transfer calls*
      - *This will reduce calls being transferred to employees in meetings or on breaks*
    - Viewing a different date in calendar (pg. 74)

**Resources:**
- I.T. Department
- GroupWise manual
- GroupWise web site (http://www.novell.com/groupwise/)
  - Online Cool Solutions Magazine
  - Documentation
  - Online Support
**Scheduling an Appointment:**
1. In the To, CC, and BC boxes, type the names of people to invite.
2. Type the place description in the Place box
3. Specify the start date, start time, and duration
4. Type a subject and message
5. Click Send
   * if you want to be sure the people and resources are available, do a Busy Search

**Busy Search (Checking when everyone's available)**
1. In an appointment you are creating specify usernames in the To box.
2. Specify the first possible day for the meeting in the Start Date box
3. Specify the meeting’s duration
4. Click Busy
5. Click Auto-Select to select the first available meeting time

**Accepting or Declining Scheduled Items**
1. Double-click the item in the Mailbox to open it
2. Click Accept or Decline
3. If you accepted, select a Show As level of availability
   * If Busy, people will not be able to reach you during the scheduled appointment. If Free, they will.
4. Type a comment (optional) and click OK
5. If the item is an Auto-Date item, you will be prompted to click This instance to accept/decline this one item, or All Instances to accept/decline all instances.

**Calendar Tips:**
- You can use Graphical Display to show appointment duration in blocks
- Time intervals in the Appointments List can be adjusted from ten minutes to two hours, depending on how much detail you want
- You can define your work schedule to display only your office hours on your Calendar
- By using Show Appointment As, you can display levels of availability for appointments in Busy Search and in your calendar

**Viewing the Schedules of Multiple Users**
1. Click the Multi-User tab
2. Click  select the check boxes by the names of the users whose schedules you want to view
3. Click OK
4. View the user’s schedules.
5. To view a different day, click Go to Day, specify the date, click OK
Appendix G
MPRO TELEPHONE TRAINING

RESPONSIBILITIES:

- Train all existing MPRO employees on the following telephone features:
  - Handsfree Operation
  - Programming of Speed Call / Line Select / Feature keys
  - Answering a call to a Pickup Group
  - Properly transferring a call (including introducing the caller)
  - Putting someone on Hold
  - 3-Party Conference
  - Adjusting telephone levels (pitch, volume, display contrast)
  - Programming Call Forwarding
  - Using the built-in Phonebook

- Train all MPRO employees on telephone etiquette, such as proper forwarding, answering, and customer interaction

- Train all new MPRO employees on the above, and also:
  - Answering a call
  - Answering a call to a Pickup Group
  - Distinguishing a Direct In Dial call from a Pickup Group call

- Train all new and existing MPRO employees on the following voicemail functions:
  - Entering your mailbox
  - Creating / changing the outgoing message
  - Play incoming messages
  - Keep incoming message
  - Discard incoming message
  - Backward / Forward through messages
  - Answer a message
  - Give a message
  - Make a message
  - Change passcode
  - Change name

- Stress the other important telephone issues:
  - Change voicemail message if out for a long period of time (> 1 day)
  - Keep the “backup person” updated so that they have a good knowledge of your projects
  - Always consult the GroupWise scheduler before forwarding a call to another employee.
    - If the employee is not in the office at that time, refer to the list of projects and contact people.

RESOURCES:

- Telephone manual by Mitel
- Voicemail manual by Centigram
- Ann Lindscheid, telephone consultant

Updated 4/15/00
Appendix H
Michigan Peer Review Organization

Organizational Directory

Administration  40500 Second Floor
Analysis        40500 Second Floor
Business Development  40500 Second Floor
Behavioral Health  40600 First Floor
P.E.P.P.         40600 First Floor
State Gov't Contracts  40600 First Floor
Information Systems  40600 Second Floor
Medicare         40600 Second Floor
Reception        40600 Second Floor
Appendix I
Area Directory with Steel Board and Graphite Aluminum Frame

Removable name strips allow quick directory changes. Hex lock for security, shatter-resistant acrylic window for safety. Magnetic letters set onto letter holders. Includes 40 letter holders and an assortment of 664 white Helvetica characters.

Quartet Area Directory with Steel Board and Graphite Aluminum Frame, 8w x 25h

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Unit</th>
<th>Price</th>
<th>Delivery*</th>
<th>Qty</th>
<th>Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>QRT2969</td>
<td>EA</td>
<td>$195.00</td>
<td>1-3 days</td>
<td></td>
<td>Add</td>
</tr>
</tbody>
</table>

Continue Shopping

Basic Office Supplies

Go to Aisle!
Quartet Aluminum Enclosed Magnetic Letter Board

Inform visitors and send them in the right direction. Anodized aluminum frame. Clear, shatterproof acrylic doors. Full-length hinges and disc tumbler locks. For indoor use. Includes installation kit. Characters sold separately. 36" x 24".

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Unit</th>
<th>Price</th>
<th>Delivery*</th>
<th>Qty</th>
<th>Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>519173</td>
<td>Each</td>
<td>$199.99</td>
<td>1-7 days</td>
<td>1</td>
<td>Add</td>
</tr>
</tbody>
</table>

Continue Shopping

Basic Office Supplies

Go to Aisle!
Appendix J
TELEPHONE ETIQUETTE SKILLS

Telephone manners are very important. Your voice over the phone is often the first or only impression a person receives of you and of MPRO. Listed below are the ways to use the telephone effectively: (**From Writers Inc. School To Work A Student Handbook, pp. 216-217)

TELEPHONE TALKING TIPS:

- Speak slowly and clearly into the mouthpiece. Do not chew gum, eat, or drink while you are talking on the telephone.
- Let your voice communicate that you are capable and interested in the caller.
- Be friendly, but do not waste time. Get to the point of the call.
- Be a good listener and pay attention to the person on the other end of the line.
- Turn off background noise such as the radio or television.
- Remain calm during the conversation, even if the person on the other end is not.
- End the conversation with a courteous comment such as “Thank you” or “Good-bye.”
- Wait for the caller to hang up before you do.
- Then replace the receiver quietly.

WHEN ANSWERING A CALL...

- Try to answer the telephone by the second or third ring.
- Identify yourself and the organization that you represent. (“Good morning / afternoon. Michigan Peer Review, this is ________________.”)
- If the call needs to be transferred, politely ask who is calling. (Ask before putting the caller on hold, and do not leave the caller on hold for long.)
- Keep note-taking materials near your telephone. If you need to take a message, be complete and accurate.

WRITING TELEPHONE MESSAGES:

Telephone messages in the workplace must be taken carefully and delivered promptly. Taking messages well requires two important criteria: (1) being polite and professional on the telephone and (2) recording all the facts correctly. Double-check the numbers and spellings with the caller and use the 5 W's as a checklist. (Remember that each message you write well will help establish your reputation as an efficient, dependable worker.)

- Who is the message for? Who is the message from?
- What is the message?
- When is the meeting or appointment mentioned in the message? When was the message written?
- Where is the receiver of the message to go or call back?
- Why is the message important--what is the purpose?

After you have taken the message, deliver if promptly. You may fill out a standard message form by hand or use electronic mail (E-mail), depending on the situation.

When you answer the telephone while working, you are one of the first contacts a prospective customer has with MPRO. Are you smiling when you pick up the phone? By physically smiling when answering, your tone is automatically more friendly.
Appendix K
Future Call Flow Chart

Call MPRO (459-0900)

Speak to Person → Alpha. Listing → Enter Extn. # → PEPP → HCQIP → Behavioral Health → State Gov’t → I.T.

Speak to Person

“reception” pickup group

available

employee

not available

employee

voicemail backup “person”
Appendix L
Corso 2000 Collection
Toll free assistance 24 hours a day, 7 days a week
1-800-950-4782

Modular Furniture System

**Bush BUSINESS FURNITURE**

**DIAMOND COAT**
- Stylish, configurable and affordable office furniture grouping
- Auburn Maple with Graphite Gray finish
- Exclusive Gray surface technology
- Added storage capacity

**WARRANTY**
1-800-950-4782

**BUSINESS FURNITURE**

1. **Bow Font Desk**
   29"H x 71"W x 36"D
   SKU#1511.2637

2. **Return Bridge**
   29"H x 47½"W x 23½"D
   SKU#1511.2619

3. **Left Corner Module**
   29½"H x 71"W x 35½"D
   SKU#1511.2575

4. **Right Corner Module**
   29½"H x 71"W x 35½"D
   SKU#1511.2520

5. **Credenza**
   29"H x 71"W x 23½"D
   SKU#1511.2593

6. **Open Single Bookcase**
   72½"H x 17¼"W x 15¼"D
   SKU#1511-2566

7. **Open Double Bookcase**
   72½"H x 35¼"W x 15¼"D
   SKU#1511-2546

8. **Reception Gallery**
   14"H x 77"W x 71"D
   SKU#1511-2557

9. **Manager's Desk**
   29½"H x 71"W x 29½"D
   SKU#1511-2584

10. **71" Hutch w/ 13.4"H x 71"W x 15¼"D
    SKU#1511-2584

11. **3-Drawer File**
    28¼"H x 15¼"W x 20¼"D
    SKU#1511-2637

12. **35" Lateral File**
    28¼"H x 35¼"W x 23¼"D
    SKU#1511-2644

13. **Utility Drawer**
    3½"H x 30½"W x 16½"D
    SKU#1511-2655

14. **Half Height Door Kit**
    28¼"H x 17½"W x 11½"D
    SKU#1511-2660

15. **Keyboard Shelf**
    4"H x 27½"W x 15½"D
    SKU#1511-2670

16. **Articulating Keyboard**
    4"H x 27½"W x 15½"D
    SKU#1511-2680

See back for configurations.
Appendix M
Possible Maintenance Schedule

Each month the following would be completed:

- Wk 1: A-F Report call forwarding, scheduler usage
- Wk 2: G-Mc Report call forwarding, scheduler usage
- Wk 3: M-Sc Report call forwarding, scheduler usage
- Wk 4: Se-Z Report call forwarding, scheduler usage
**Line Status Display:** shows the status of lines at all times

**Speed Call / Line Select / Feature Keys:** Programmed as speed call keys or feature keys

**Features Display:** used to display caller and call-handling info, messages, and softkey prompts

**Display Contrast Control:** Adjusts LCD contrast for best viewing

**Softkeys:** Guide you through current activity shown in the Feature Display

**Superkey:** Accesses programming mode, activates forwarding, speed call, messaging, phone book, calculator, and telephone adjustments

**Superkey Access:**
- Press Superkey
- Press More...
- Press Speed call
- Select a Speed Call Key
- Enter number to be saved
- Press Save
- Press Superkey when finished

**Message indicator:** flashes when you have a message waiting

**To transfer a call:**
- Press Trans/Conf
- Dial destination #
- Wait for destination to answer
- Introduce the caller
- Press Release Me

**If party does not answer:**
- Press Back to Held

**To Program Speed Call #s**
- Press Superkey
- Press More...
- Press Speed call
- Select a Speed Call Key
- Enter number to be saved
- Press Save
- Press Superkey when finished

**VOICEMAIL**

**Keep (or save) messages**
- Make a message (send / record)
- Play messages
- Discard (delete) messages
- eXit a menu, or exit voice mail

**User options**
- *Backward
- # Forward
- To change your greeting, pass code.
- *Backward
- # Forward

**Setting Advisory Messages:**
- Will show up on any other display phone calling you
  - Press Messaging
  - Press Advisory
  - Use Next Msg and Previous Msg to move through the list

**Phonebook:**
- Press Phonebook
- Enter the name from your dialpad

**To use Calculator:**
- Press Superkey
- Press Calculator

**Adjust Ringer Volume**
- Press Superkey
- Press More...
- Press Ring Adjust
- Press Ring Vol
- Tap vol ^ or vol v

**To program Call Forward:**
- Press Superkey
- Press More...
- Press Forwarding
- Select Type of Forwarding
- Select INT/EXT or both
- Enter new destination
- Press Save / On

**Call Forwarding Options**

You can forward your calls to another extension when your line is busy or when you are away from your desk:
- Always
- Busy
- No Answer
- Busy & No Answer
- To me (at another location)

**To turn Forward Off / On**
- Press Superkey
- Press More...
- Press Forwarding
- Press Turn FWD on or Turn FWD off

**Voice Mail:**

**Retrieving your messages**
- Dial your voice mail number
- Press * or "0"
- Enter your personal pass code
- The system will tell you how many messages you have; played (saved) and un-played (new).
- Each message will be time and date-stamped
- Press “9” to exit the system

**Press:**
- P PLAY to play the oldest new message
- K KEEP to keep the message
- D DISCARD to discard the message
- P PLAY to play the next un-played message
- L Lists (group lists)
**Michigan Peer Review Organization**

**Organizational Directory**

<table>
<thead>
<tr>
<th>Department</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>40500 Second Floor</td>
</tr>
<tr>
<td>Analysis</td>
<td>40500 Second Floor</td>
</tr>
<tr>
<td>Business Development</td>
<td>40500 Second Floor</td>
</tr>
<tr>
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<td>40600 First Floor</td>
</tr>
<tr>
<td>P.E.P.P.</td>
<td>40600 First Floor</td>
</tr>
<tr>
<td>State Gov't Contracts</td>
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<td>40600 Second Floor</td>
</tr>
<tr>
<td>Reception</td>
<td>40600 Second Floor</td>
</tr>
</tbody>
</table>

![Floor Plan Diagram]

40600 First Floor

40600 Second Floor
Call Management System

Goals

- Optimize call management system
  - outside clients
  - MPRO employees
- Analyze switchboard staffing issues
- Involve all key constituents in the analysis
- Generate two or more feasible scenarios from which the MPRO organization can choose.

Current telephone situation

- In order to reach an MPRO employee:
  - call the switchboard (459-0900) where an "Auto-attendant" picks up
  - use the alphabetical listing
  - enter the extension
  - have the switchboard operator route the call
  - use the employee's Direct In Dial number
  - call the department's secretary
- Neither MPRO employees nor outside clients feel satisfied with the current system
- Calls are frequently misrouted or need to be routed to several (4-5) people before reaching an available person.
Log sheet data-1

Log sheet data-2

Destination of calls to switchboard
Telephone functions - improvements

- Messaging on "Auto-attendant": Add options to route calls directly to Medicare, HCQIP, PEPP, and possibly Behavioral Health, State Government and I.T.
  - Would decrease the call volume to the main MPRO number by nearly 30% (to approximately 2.8 calls per hour)
  - Should be ordered in descending order of volume to current destinations
  - Should not exceed 9 options, including alphabetic listing, extension #, live person

Building Directory

- Quartet Area Directory: $195.00
- Quartet Magnetic Letter Board: $199.99
- Post prototype

Receptionist Resources

- Current, updated list of all employees, including all new arrivals
- Current, updated list of all MPRO projects / contracts and employees involved with them
- These documents can be updated by the receptionist and posted on the GroupWise document manager
Option Tree

Critical Decisions
- Current menu options / expanded menu options / use DID only?
- Number of Receptionists?
- Location of Receptionist?

Alternative #1
Receptionist's Desk

- Move the reception area to 2nd floor of 40500
- Could direct visitors to conference rooms, HR, etc.

- Desk: $199.99
- Reception Gallery: $189.99
- Three Drawer File: $159.99
- Bridge: $109.99
- TOTAL: $769.96

Alternative #2

- Current state system
- Tied off from existing, new GFD
- Expanded system process

Alternative #2-Future State

- Call MPRO (459-0900)
- Speak to Person
- Alpha Listing
- Enter Ext. #
- FEPP
- HCQIP
- Behavioral
- Health
- State Gov't
- IT