

Outbound Calls Setup and Functionality Guide

05 October 2021



COMMERCIAL STATEMENT

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HELPDESK & SUPPORT

For help and support, please contact TEAM Software Technical Support:

- **Opening hours:** 8am -5pm Monday - Friday (excluding weekends and public holidays)
- **Contact telephone number:** 0370 626 0400 (then press option 1)
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WHAT ARE OUTBOUND CALLS?

Outbound Calls comprise Chase Calls, **Reverse Check Calls** and **Escalation Calls** within Timegate. All three **Outbound Call types** are configured in an **Outbound Call Profile** which is then assigned to one or more sites.

DO REVERSE CHECK CALLS, CHASE CALLS AND ESCALATION CALLS ALL HAVE TO BE CONFIGURED TOGETHER?

Although the functions are configured using the same screen (the **Outbound Call Setting Profile** screen), it is not necessary to have all three Outbound Call types configured together. You can choose which of the three to configure based on your business need. You may configure one, two or all of them for applying to a site. The different combinations are as follows:

- Reverse Check Call (but they have to use part of the Chase Calls settings when set up)
- Escalation Call
- Chase Call
- Chase Call and Reverse Check Call
- Chase Call with Escalation Call
- Chase Call with Escalation Call and Reverse Check Call
- Reverse Check Call with Escalation Call

Only one Outbound Call Profile can be assigned to a site at any one time. The profile can, however, be used across multiple sites at the same time. A different adhoc escalation group can be selected for each site when needed for **Escalation Calls**.

WHAT NEEDS TO BE CONFIGURED IN TIMEGATE TO USE OUTBOUND CALLS?

Depending on the type of outbound call that you wish to set up, the following items will require setting up:

- **Site Telephone Number(s)** - for **Chase Calls** and **Reverse Check Calls**
- **Employee Mobile Number** - optionally for **Chase Calls**
- **Adhoc Escalation Group** - for **Escalation Calls**

Behind the scenes, TEAM will ensure that the following are in place for the chase and reverse check calls to be made:

- Outgoing TimeLink needs to be licensed
- Changes to the SIP Trunk element of Clock-in.com need to be made
- Clockin-in.com needs to be configured as follows:
 - Select Outgoing Calls
 - Ensure Outgoing Telephone number is TAD number
 - Ensure Outgoing Channels is set to no more than 5

WHERE DO I DEFINE SITE TELEPHONE NUMBERS (CLID NUMBER)?

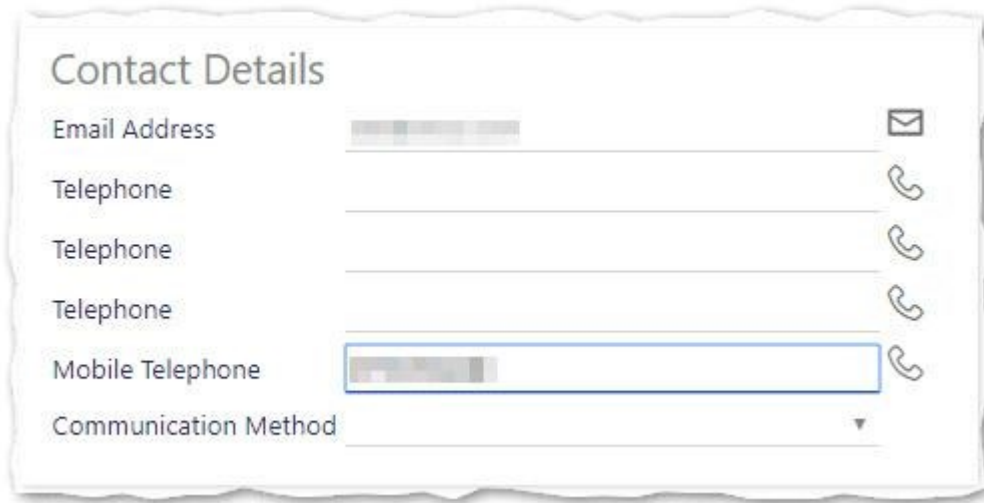
You can define a **Site telephone number** at **Set Up | Site | Caller ID**:



- Select **+ Add Number**
- Enter your first **Telephone Number** in the space provided for the first chase number
- Select **1st Chase**
- To add a further (optional) second number, **Select + Add Number**
- Enter your second **Telephone Number** in the space provided for the second chase number
- Select **2nd Chase**
- Select **Save**

WHERE DO I DEFINE AN EMPLOYEE'S MOBILE TELEPHONE NUMBER?

An employee's mobile telephone number is defined in **Set Up | Employee**. Locate the **Employee's Contact Details**:



The image shows a screenshot of a 'Contact Details' form. The form has a title 'Contact Details' at the top left. Below the title are several input fields: 'Email Address' with a greyed-out value and an envelope icon; three 'Telephone' fields, each with a greyed-out value and a telephone handset icon; a 'Mobile Telephone' field with a greyed-out value, a blue border, and a telephone handset icon; and a 'Communication Method' field with a dropdown arrow. The entire form is enclosed in a white box with a torn-paper edge effect.

Within that section of the page, add a Mobile Telephone. Select Save once complete.

HOW DO I DEFINE AN ADHOC ESCALATION GROUP?

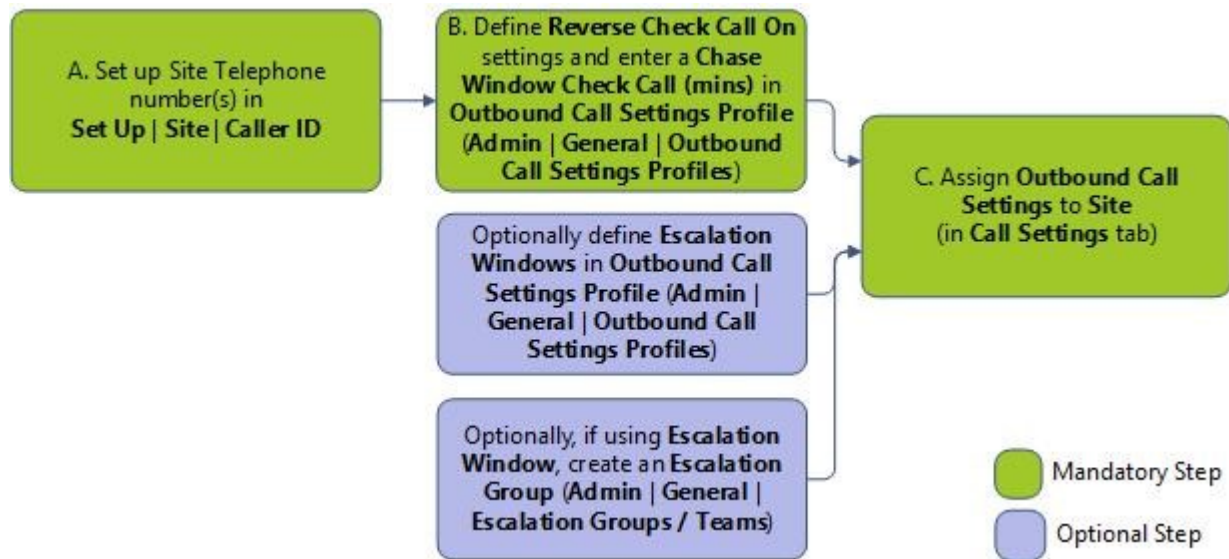
Full details of creating escalation groups can be found in [How do I set up an escalation group?](#) along with [What are the different types of escalation group?](#)

WHAT IS A REVERSE CHECK CALL?

When configured, Reverse check calls (also referred to as safety calls), automatically call the employee at a random point in time when they have booked on to their duty. By implementing Reverse Check Calls, the employer is not only able to check that the employee is where they are meant to be, they are also able to check on the well-being of the individual (for example, in a lone worker scenario). Reverse Check Calls can be configured to take place on week days, weekends and public bank holidays. When configured, they must have a **Chase Window Check Call (mins)** value assigned to them.

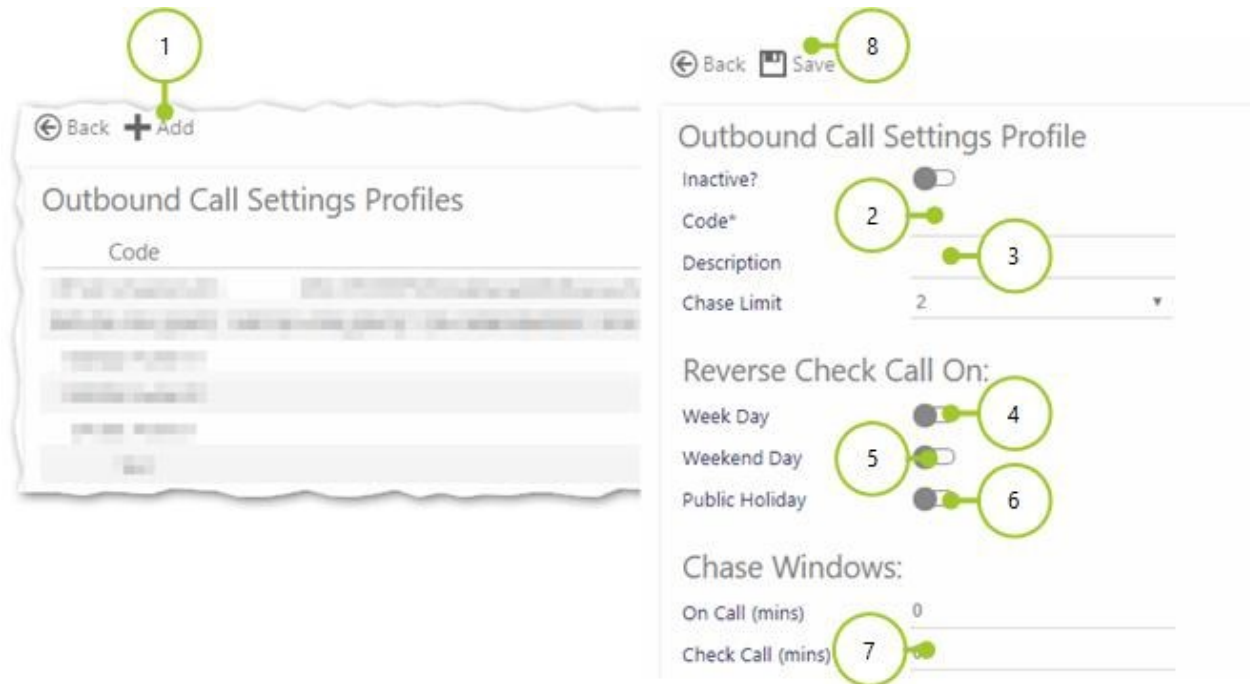
WHAT IS THE PROCESS FOR SETTING UP A REVERSE CHECK CALL?

The following process shows the three mandatory and two optional steps that need to be followed to enable the **Reverse Check Call** functionality (and an optional **Escalation Call**):



HOW DO I SET UP A REVERSE CHECK CALL IN AN OUTBOUND CALL SETTINGS PROFILE?

You can set up a **Reverse Check Calls** as part of an **Outbound Call Setting Profile**. This is done at **Admin | General | Outbound Call Settings Profiles**:



1. Select **+Add**
2. Enter a **Code** for the profile
3. Enter a **Description** outlining the profile

You are now presented with a series of options in the **Reverse Check Call On:** part of the screen:

4. Select **Week Day** so that people will get reverse check calls when they have booked onto a duty that has started on a week day
5. Select **Weekend Day** so that people will get reverse check calls when they have booked onto a duty that has started on a weekend day
6. Select **Public Holiday** so that people will get reverse check calls when they have booked onto a duty that has started on a public bank holiday

Now, look at the **Chase Windows:** part of the screen

7. Enter a value for the **Check Call (mins)** e.g. 5 or 10 mins. The Check Call minutes indicate the size of the time window during which the **Check Call** chases will occur i.e. if 10 minutes is entered, the call will happen within a 10 minute window of the reverse check call being missed, not necessarily 10 minutes after the call being missed.
8. **Select Save**



TIP: Remember, you can use **Reverse Check Calls** in conjunction with **Chase Calls** and/or **Escalation Calls**. Details about how to configure both types of Call can be found in "How do I set up Chase Calls in an Outbound Call Setting Profile?" on page 18 and "How do I set up my Escalation Calls in an Outbound Call Setting Profile?" on page 21

WHAT IS A CHASE CALL?

A **Chase Call** is a call that is made when an employee has not made a call into your organisation (via **Clock-in.com**) as expected. This could be a call to book on at the start of duty, a call to book off at the end of the duty, or a scheduled check call during their duty. A **Chase Call** takes place a defined number of minutes after the post on/off/check-call window.

Each of the three **Chase Call** types can have a different length of time assigned to them before a Chase Call is made. **Chase Calls** only take place when expected calls by the employee to the organisation are not made. The number of chase calls is limited to between 1 and 5. By default, it is set to 2. When a Chase Call is made, depending upon configuration, **Clock-in.com** calls either the **Site telephone number** or the **Employee's mobile phone number**, asking for a correct PIN/SIN each followed by # to confirm their presence. If unsuccessful, the caller will be given a further two attempts to enter in the correct information, before the call is hung up.

When a Chase Call is made, depending upon configuration, Clock-in.com calls either the:

- **Site**, expecting the employee to pick up the call and enter their SIN and PIN, each followed by a #. If successful, they are then booked onto their duty (or booked off, or their check call processed). Up to two site telephone numbers can be defined.
- **Employee's mobile phone number**, expecting the employee to pick up the call and enter their SIN and PIN, each followed by a #. If successful, they are then booked onto their duty (or booked off, or their check call processed)

When the Chase Call is set up to call a multi-man site (i.e. call employee mobile tick box is unticked), then when a chase call is made, regardless of which employee takes and responds to the call, calls that are outstanding for all other employees will be taken too. Chase Calls to sites always work this way.

Alternatively, when the chase call is set up to call the employee (i.e. call employee mobile tick box is ticked) then only the duty for the employee who picks up the call will be booked on. If any other employees have also forgotten to book on, then they will receive their own call and will be booked on when they enter their own correct SIN and PIN.

When employees are being chased, when they pick up the call they will be prompted with either of the following depending upon the type of call that they have missed:

- "You have missed your on call"
- "You have missed your check call"
- "You have missed your off call"

In response, they must enter the contract number (SIN) followed by the # key. They will then be asked to enter the employee number (PIN) followed by the # key.

If the SIN and PIN numbers have been entered correctly, they will hear the relevant message for their call type from the three below:

- "You have been successfully booked on"
- "Your check call has been successfully registered" – this will apply to both check calls and reverse check calls
- "You have been successfully booked off"

Finally, the employee will be thanked and told to hang up.

If an incorrect SIN or PIN number is entered, then the message they hear will be “That number was not valid”. The employee will need to enter the SIN and PIN again. The employee will be given three attempts to get it right before the call is ended.



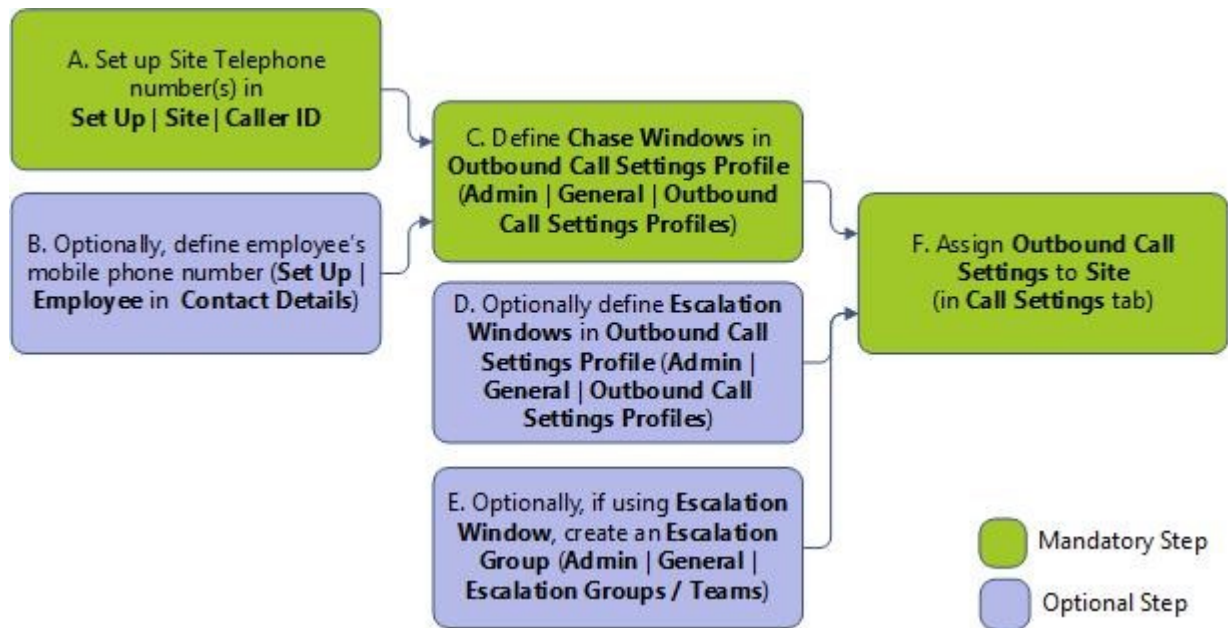
Please Note: If an employee doesn't have a mobile phone number declared in the system, the Chase Call will be made to the Site telephone number



PLEASE NOTE 2: If a * is pressed when taking the call, rather than a #, then a covert duress alert is triggered in Timegate

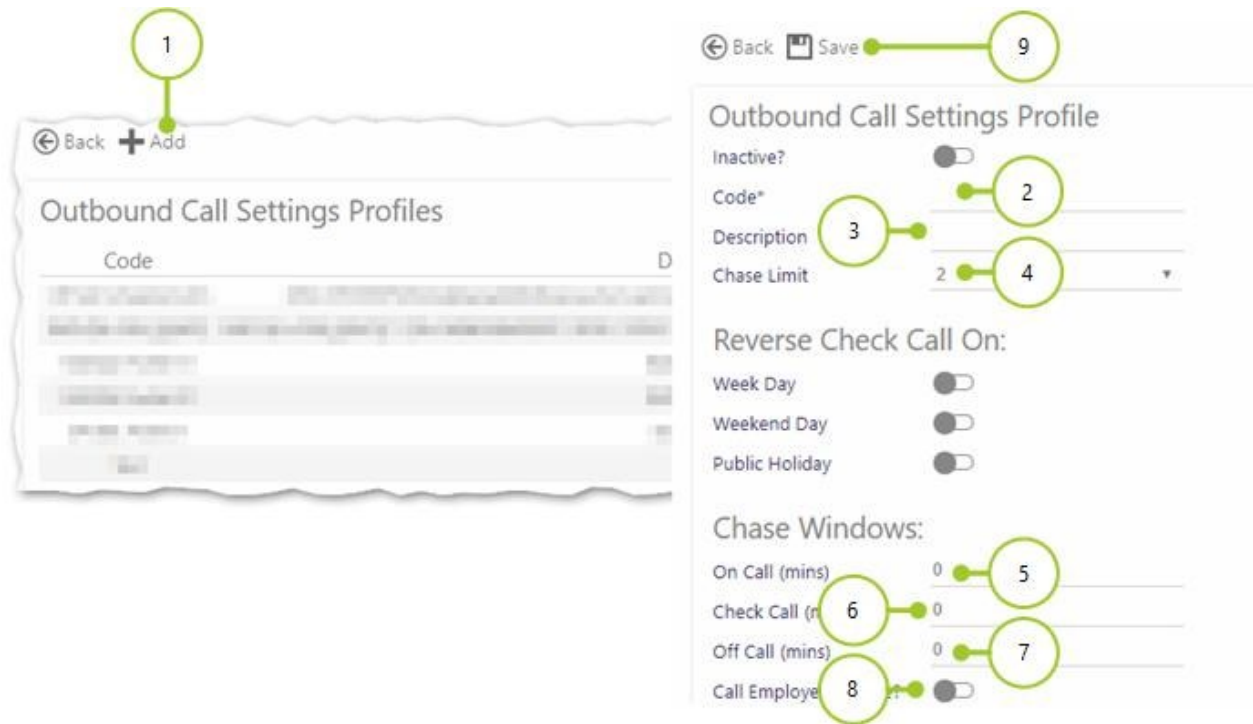
WHAT IS THE PROCESS FOR SETTING UP A CHASE CALL?

The following process outlines the optional and mandatory steps for setting up a **Chase Call** with optional **Escalation Call**:



HOW DO I SET UP CHASE CALLS IN AN OUTBOUND CALL SETTING PROFILE?

To set up a **Chase Calls** as part of an **Outbound Call Setting Profile**, firstly go to **Admin | General | Outbound Call Settings Profiles**:



1. Select **+Add**
2. Enter a **Code** for the profile
3. Enter a **Description** outlining the profile
4. Enter the number of chase calls in the **Chase Limit** (this can be from 1 to 5)
5. Enter the Chase Window **On Call (mins)** - this is the duration in minutes within which the Chase Call for missed On Calls will occur. This is not the time after which the Chase Call for an On Call will occur, but the window of time within which the given call will occur.
6. Enter the Chase Window **Check Call (mins)** - this is the duration in minutes within which the Chase Call for missed Check Calls will occur. This is not the time after which the Chase Call for a Check Call will occur, but the window of time within which the given call will occur.
7. Enter the Chase Window **Off Call (mins)** - this is the duration in minutes within which the Chase Call for missed Off Calls will occur. This is not the time after which the Chase Call for an Off Call will occur, but the window of time within which the given call will occur.
8. Select whether to **Call Employee Mobile** rather than the **Site Call ID number(s)**
9. On completion, select **Save**

Please Note: The values listed in 5 through 7 indicate a window of time. They are not simply a number of minutes after an On, Check or Off Post Call times, that the Chase Call will be made. The **Post Call** times are set up at a **Site level** under the **Settings** tab. The defined window extends the PostTime for the call. Take this example, which has an escalation call within an associated window of time. If the Post Time is set to 10 minutes, the Chase Time time to 5 minutes and the Escalation time to 15 minutes then the chase calls will take place inside the 5 minute window starting at the end of the Post Time. The Escalation calls will then start in the 15 minute window starting at the end of the Chase window.



The Site Call ID number(s) are set up at a **Site level** under the **Caller ID** tab. If you wish to add an Escalation Call to your Chase Call, see the sections below.

If **On Call (mins)**, **Check Call (mins)** and **Off Call (mins)** are set to **0**, this means that the **Chase Call** feature is disabled.

Remember you can use **Chase Calls** in conjunction with **Reverse Calls** (see "How do I set up a Reverse Check Call in an Outbound Call Settings Profile?" on page 13) and/or **Escalation Calls** (see "How do I define an adhoc Escalation Group?" on page 10)

WHAT IS AN ESCALATION CALL?

An Escalation Call is a call that will happen either independently of the other chase calls, following the failure of a reverse check call, or once a chase call has failed (i.e. the employee did not pick up the phone on the site or they did not answer their mobile. The escalation call looks to an adhoc escalation group which consists of up to 5 supervisors who are each called in turn until one of them acknowledges the call. For escalation calls, the recipients of the call will receive one of four prompts:

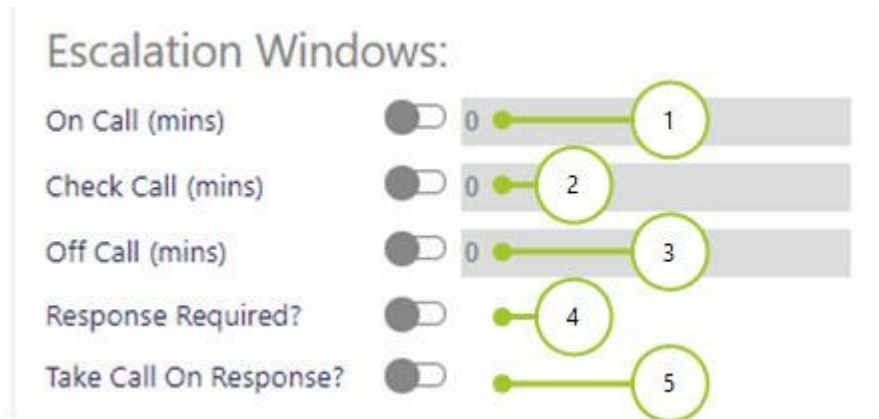
- “An on call has been missed”
- “A check call has been missed”
- “An off call has been missed”
- “A safety call has been missed”

The recipient of the escalation call will then hear the SIN and PIN numbers played back to them.

- A further prompt will then be played; “Please contact control. Press 1 to acknowledge”
- If the recipient of the escalation pressed 1, they will hear a further prompt; "You have acknowledged the call”
- If the recipient of the escalation presses any other key, they will hear the following; “You have chosen not to acknowledge the call”
- Regardless of the key that they press, they will be thanked, and the call will end.

HOW DO I SET UP MY ESCALATION CALLS IN AN OUTBOUND CALL SETTING PROFILE?

You can set up a **Escalation Calls** to work independently, with **Chase Calls** or with **Reverse Check Calls**, as part of an **Outbound Call Setting Profile**. This is done at **Admin | General | Outbound Call Settings Profiles**. Open the **Outbound Call Setting Profile** that you wish to configure the **Escalation Calls** settings for. Locate the **Escalation Window** part of the screen as shown. Please remember that escalation windows are windows of time, not specific times after which an escalation call is made. e.g. if **Escalation Windows On Call (mins)** is configured to 15, that means within a 15 minute window of the On Call not being made, an escalation call will be made.



1. Select **On Call**. Then, enter the minutes between 0 and 59 at which the missed on call is escalated. Please note that by having the value set to 0, this means no escalation window of time is set, and in turn no escalation call will be made for missed On Calls
2. Select **Check Call**. Then, enter the minutes between 0 and 59 at which a missed check call is escalated. Please note that by having the value set to 0, this means no escalation window of time is set, and in turn no escalation call will be made for missed Check Calls
3. Select **Off Call**. Then, enter the minutes between 0 and 59 at which a missed off call is escalated. Please note that by having the value set to 0, this means no escalation window of time is set, and in turn no escalation call will be made for missed Off Calls
4. Select **Response Required?** if you wish for the call to be continued to be chased once a supervisor has acknowledged the overdue call
5. Select **Take Call on Response** if you wish for the overdue call to be taken once it's acknowledged by a supervisor. If this option isn't selected, then when the manager acknowledges the call, the call isn't taken, but it is no longer escalated, and the call goes dark blue in **Call Monitor**
6. Select **Save**



Please Note: To set up a **Escalation Calls** to work independently of any other settings (i.e those for **Reverse Check Calls** or those for **Chase Calls**), please ensure that **Reverse Check Calls** are not selected. Also, ensure that the values for all of the **Chase Window** attributes are set to 0



PLEASE NOTE 2: If escalation groups are being used in conjunction with Chase Calls and Reverse Check Calls, The window minutes (for Escalation/Chase On/Off/Check Call) indicate the size of the time window during which chases will occur. Not the time after which they will occur. This window extends the PostTime for the call. So, if the Post Time is set to 10 minutes, the Chase Time time to 5 minutes and the Escalation time to 15 minutes then the chase calls will take place inside the 5 minute window starting at the end of the Post Time. The Escalation calls will then start in the 15 minute window starting at the end of the Chase window.

HOW DO I ASSIGN AN OUTBOUND CALL SETTING PROFILE TO A SITE?

When you have configured your **Chase Calls** and/or **Reverse Check Calls** within your **Outbound Call Settings Profile**, you will need to assign them to a site. You do this from within the **Site's Call Settings** tab as shown below:



1. Select [...]
2. From **Pick Outgoing Call Profile**, select the **Outbound Call Profile**
3. Now optionally, select your **Escalation Group**
4. Select **Save**

DO I NEED TO SET THE SMS ALERT WINDOW IN THE OUTBOUND CALL PROFILES?

When you are setting up your **Outbound Call Profile**, you will see a field called **SMS Alert Window**. This field has nothing to do with chasing or escalating. It has simply been left on this screen following some design changes to Timegate's interface in the past. You do not need to do anything to this value when configuring your **Outbound Call Profiles**.

WHAT OUTBOUND CALL INTERACTIONS CAN BE SEEN IN THE T&A MONITOR?

All interactions with either the employee or the supervisor will be shown in the T&A screen. However, if a call is not picked up (and the call doesn't go through to voicemail), then nothing will show in the T&A Monitor, but the call count will still be increased, so the call will not continue to be chased or escalated past the "Call Limit" set on the **Outbound Call Settings**.

WHAT OUTBOUND CALL INTERACTIONS CAN BE SEEN IN THE CALL MONITOR?

Below shows the process of calls in **Call Monitor**.

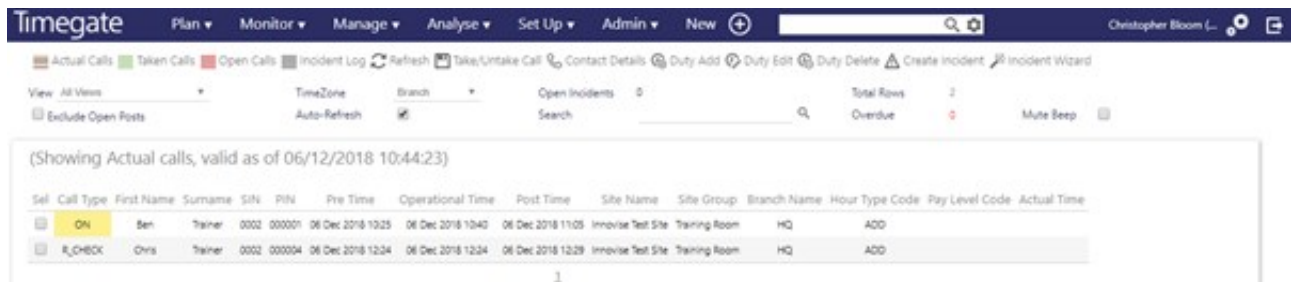
The **Post Time** is a combination of profile and call settings post windows.

Reverse Check Calls will not be visible in the Call Monitor for a single duty until the employee has Booked On.

However, for multiple duties on the same site Timegate randomly selects a duty to allocate the reverse check call to.

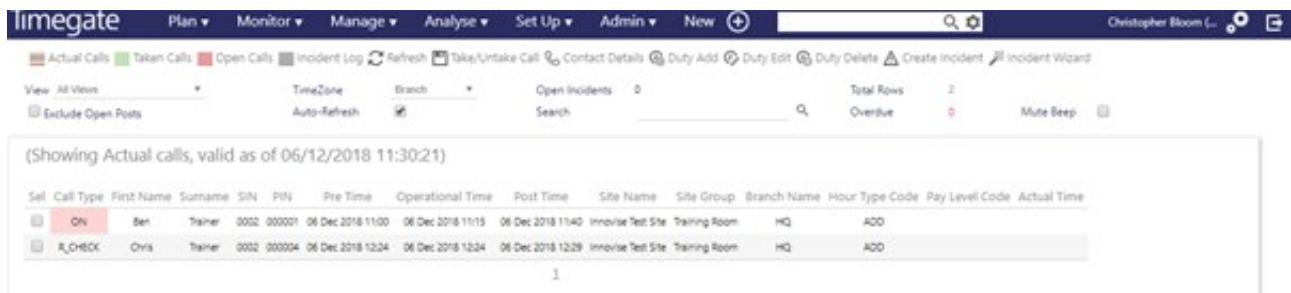
Operational time

Call turns yellow when the Operational Time Window is reached



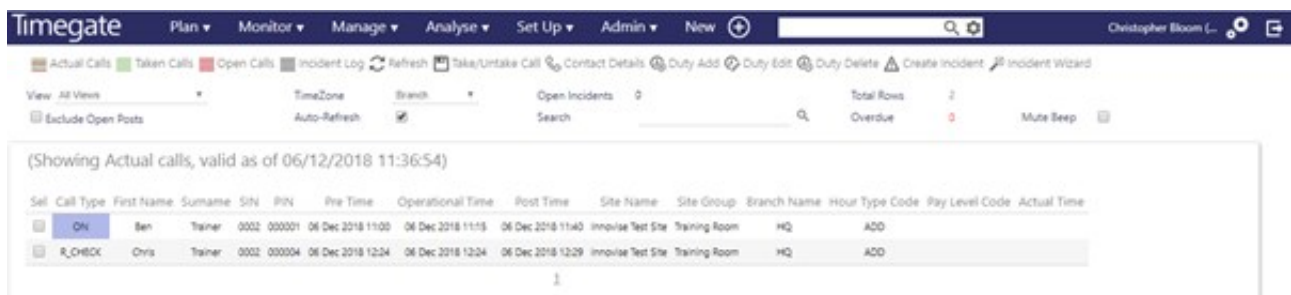
Call chased

Call turns Pink when the Call is being Chased



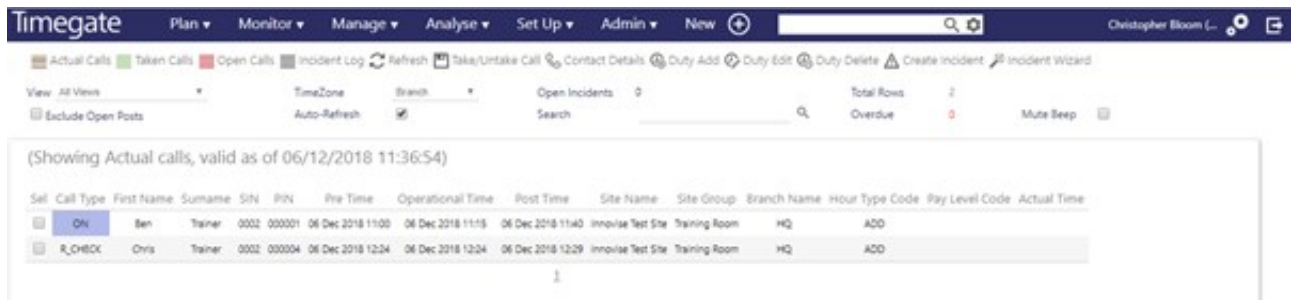
Call escalated

Call turns Light Blue when the call is being escalated



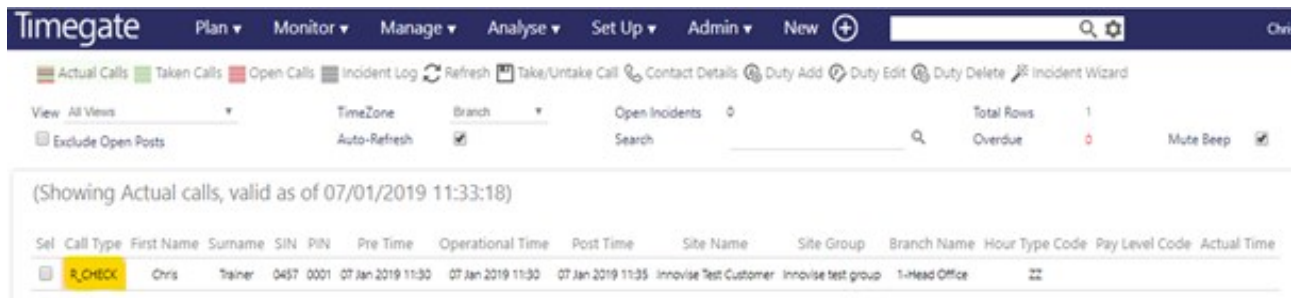
Call acknowledged

When the supervisor acknowledges the call, the call isn't taken, but it is no longer escalated. The call then turns dark blue in Call Monitor. If calls are not acknowledged, then calls will be escalated to the Overdue Call Alerts escalation group that was assigned to the site



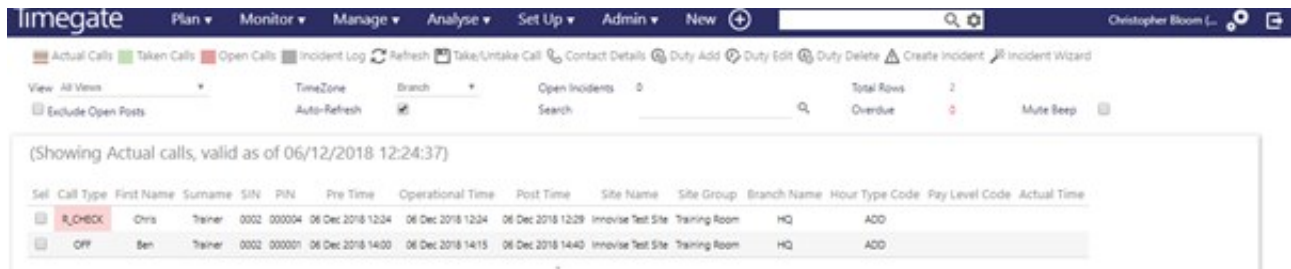
Reverse Call in Call Monitor

Reverse Check Call visible in Call Monitor



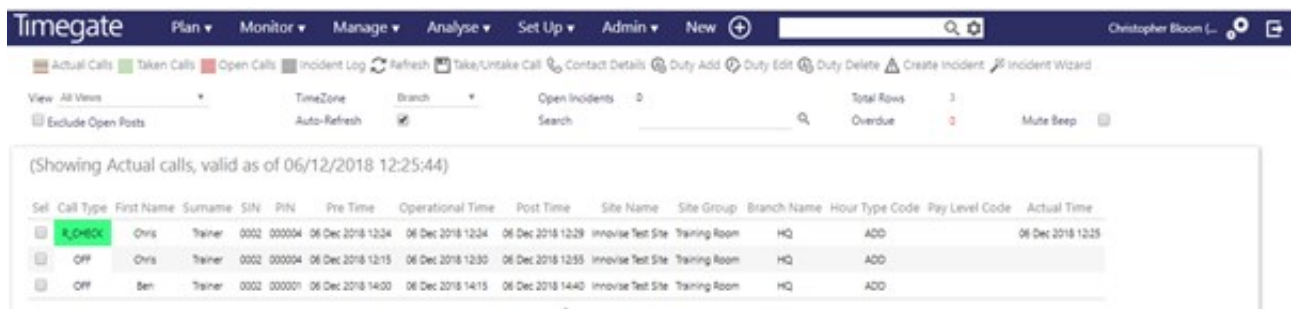
Reverse Call Escalated

Reverse Check Call goes Pink when being escalated



Reverse Call Accepted

Reverse Check Call goes Pink when being escalated



Reverse Check Call Overdue

Reverse Check Call goes red when overdue then calls will be escalated to the **overdue call alerts** escalation group that was assigned to the site

(Showing Actual calls, valid as of 06/12/2018 13:44:06)

Self	Call Type	First Name	Surname	SIN	PIN	Pre Time	Operational Time	Post Time	Site Name	Site Group	Branch Name	Hour Type Code	Pay Level Code	Actual Time
	R_CHECK	Chris	Trainer	0002	000004	06 Dec 2018 13:24	06 Dec 2018 13:24	06 Dec 2018 13:29	Innovise Test Site	Training Room	HQ	ADD		
	OFF	Ben	Trainer	0002	000001	06 Dec 2018 14:00	06 Dec 2018 14:15	06 Dec 2018 14:40	Innovise Test Site	Training Room	HQ	ADD		

Edit Duty

To see if the Reverse Check call has been applied to the duty go to the **Duty | Edit | Calls** tab

Innovise Test Site - Slot No: 4 (Post 4) - 06/12/2018

Scheduled Operational Actual Pay/Bill

Times: Calls Check Falls Premiums Qualifications Audit Trail Sub-Duties Pay/Bill Info Service

Call Type	SIN	PIN	Expected Time	Actual Time	Duty Call Created On	Proof Of Presence
ON	0002	000004	06/12/2018 12:30:00	06/12/2018 12:30:00 (Telephone)	06/12/2018 12:30:28	
R_CHECK	0002	000004	06/12/2018 13:24:00		06/12/2018 13:33:02	
OFF	0002	000004	06/12/2018 13:30:00		06/12/2018 13:29:40	

Audit Trail in Duty Edit - Calls Tab

Innovise Test Site - Slot No: 1 (Post 1) - 06/12/2018

Scheduled Operational Actual Pay/Bill

Times: Calls Check Falls Premiums Qualifications Audit Trail Sub-Duties Pay/Bill Info Service

Call Type	SIN	PIN	Expected Time	Actual Time	Duty Call Created On	Proof Of Presence
ON	0002	000004	06/12/2018 10:30:00	06/12/2018 10:16:00 (Telephone)	06/12/2018 10:16:29	
R_CHECK	0002	000004	06/12/2018 12:24:00	06/12/2018 12:25:00 (Chat)	06/12/2018 12:24:53	
OFF	0002	000004	06/12/2018 12:30:00	06/12/2018 12:27:00 (Manual)	06/12/2018 12:26:40	