

WebSitter Pro Training

June 2021 Update



Agenda

1. Modules
2. Creating and verifying users
 - 2.1. Client Admin
 - 2.2. Doctor
 - 2.3. Call Center
3. Setting up the data
 - 3.1. Other entities
 - 3.1.1. Body Parts
 - 3.1.2. Conditions
 - 3.1.3. Procedures
 - 3.2. Departments
 - 3.2.1. Subspecialties
 - 3.3. Insurances
 - 3.4. Hospital Affiliations
 - 3.5. Locations
 - 3.6. Practices
 - 3.7. Doctors (Providers)
4. Doctor bio approvals
5. Connecting/Importing to website

Creating and Verifying Users

Module: Admin Portal

User Types:

- Client Admin - administrative role, can create other users, can create standardized content such as conditions, departments etc, can approve doctor bio updates
- Doctor - can update their own profile
- Call center - view only approved system information

Confirming Users:

- Confirm immediately is checked by default.
 - User will not receive an email notification that the account has been created.
 - Use this option if you want to setup your team before notifying them about the account.
 - If confirm immediate is unchecked, the user will receive account creation notification.
- A user must be confirmed before you can act (login) as that user.
- Password reset can be sent by user or Client Admin.

* First Name

Enter first name



* Last Name

Enter last name

* Email

Enter email

Phone Number

Enter phone number

* Customer

Choose customer



* Role

Choose role



Job Title

Enter job title

Confirm User Immediately

Create User

WebSitter Data Setup

Module: WebSitter Pro

Data must be entered in a specific order to ensure that it is available to be selected for related fields. *(ie: You must have departments created before you create a location because locations require you to select a department)*

Setup order:

1. Departments - REQUIRED
2. Locations - REQUIRED
3. Insurances
4. Hospital Affiliations
5. Practices
6. Other entities (Conditions, Procedures, Body Parts)
7. Doctors (Providers) - REQUIRED

WebSitter Pro Doctor Setup

Module: WebSitter Pro

Once all data has been entered, a doctor profile can be setup.

- Profile photos **MUST** be JPEG or PNG that is 500px x 600px to be accepted.
- The doctor profile has fields that are free text (such as name, bio, education) and other fields that must be filled from a prefilled list (such as credentials, location, procedures etc.)
- If a doctor is completing their bio and a prefilled option is missing, they must request that it be added to the data by the admin.
- When a doctor has completed their edits, the bio is submitted for approval. The information will not display on the website or for the call center until the changes have been approved.
- Doctor order by default is the order in which they were entered into the system. If you need to edit the doctor order, select “Set Order” at the top of the user list and drag-n-drop the providers in your desired order.

Approvals

Module: WebSitter Pro

The Client Admin role is the only role with the ability to approve Doctor bio changes.

- On the main dashboard of WebSitter Pro there is a list of recent pending approvals. You can review the approval from the dashboard or open the full list of pending approvals.
- You have the option to approve, decline and view.
- View will give you a side by side look at the changes before you approve.
- If you decline the changes you have the ability to let the user know why it was declined so they can revise and resubmit.

Reminder! Bio changes will not be visible on the website or the call center view until they are approved.

Connect and Import to WordPress Website

Website with WordPress Version 4.8 or higher and WebSitter Pro WordPress Plugin

- Install and activate the WebSitter Pro plugin via the plugin search feature within the plugin page of your WordPress website.
 - *Install updates as they become available - this is how we push new features or compatibility updates with WordPress.*
- Authenticate the account by logging in with a Client Admin login from WebSitter Pro.
- Manually Import the data from WebSitter Pro for the first time.
 - Data changes are automatically imported every 4 hours, or you can repeat this process if you wish to pull the data sooner.
- Configure the plugin settings, such as built in styling settings or custom CSS, setting the filters etc.
- Add the shortcodes to the desired pages OR use the WebSitter Pro addons for Visual Bakery.
- The website only displays information that is completed. (e.g.: If a doctor does not have publications or awards, the titles for that section will not be displayed.)