

Smart Desk & Smart Calls Configuration Guide

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The **Smart Desk & Smart Calls** module uses generative AI to understand, process, and answer patient phone calls and inquiry requests. It supports routine FAQs and self-service workflows for scheduling, cancellations, rescheduling, and next appointment details, and can forward complex requests to staff.

Key configuration options

General setup and frequently asked questions (FAQs)

- **Enable Smart Desk:** Main toggle that lets FrontOffice+ use generative AI to understand patient requests.
- **Smart Desk workflows included:** Four different workflows:
 - Scheduling
 - Cancellations/Rescheduling
 - FAQs
 - Next Appointment Details
- **Frequently Asked Questions (FAQs):** Add, search, and manage custom clinic FAQs (such as office location, hours, accepted insurance, or cancellation policies) so FrontOffice+ can answer patient questions accurately.

Smart Calls automation

- **Smart Call Forwarding:** FrontOffice+ transfers phone calls directly to a staff member when the patient requests it.
- **Smart Calls Inbox:** FrontOffice+ takes detailed message notes for patient requests that fall outside supported automated workflows.

Set up by location

Configure location-specific call routing and language parameters:

- **Location name and hashtag:** View and manage unique hashtags associated with each clinic site.
- **Phone numbers by language:** Assign dedicated phone numbers per location categorized by language preference (for example, English or Spanish).

Example

- **Scenario:** A clinic wants FrontOffice+ to handle phone inquiries after hours, answer location and insurance questions, and forward complex calls to reception.
- **Setup:** Turn on **Enable Smart Desk**. Add the clinic address and insurance details under **Frequently Asked Questions (FAQs)**, and turn on **Smart Call Forwarding**.
- **Outcome:** When a patient calls, FrontOffice+ automatically helps with their requests and answers their FAQs or guides them through SMS or web scheduling, while routing complex calls to staff.

Before going live

Confirm:

- **Feature activation: Enable Smart Desk** is turned on.
- **FAQ coverage:** Common questions (office hours, location, accepted insurance) are populated accurately.
- **Call forwarding numbers:** Staff phone numbers, along with working days and hours, are correctly assigned for call forwarding when staff intervention is needed.
- **Location mapping:** Assigned phone numbers and languages match the appropriate clinic locations under **Set Up by Location**.



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