J. Online Scheduling Agreement Procedures

New and existing clients should be encouraged to enroll in online scheduling. Clients will be directed to the www.istc.net website to complete the ***Online Scheduling Agreement*** located inside of the ***Forms and Applications*** link. Once the request has been submitted the customer service representative will receive an email notification. These procedures should be followed when a client has submitted a request.

a. Locate and print the email request submitted.

b. Log into Primus

c. Select Client and client search.

d. Enter the client id number and click search

e. Select the .

f. Select Menu in the top right corner and inside the drop down box click on "View Client Users".

g. If the column is empty proceed to step h but if the client already has a current user then send them the Online Request Advice doc. email.

h. Select Menu in the top right corner and inside the drop down box click on "Client Password"

i. In the top right corner select "Edit".

j. In the first column locate the password section.

k. Click on the [Gen] beside this section (this will generate a password for the client)

Note: Avoid using passwords with the letters i and l or o and the number 0, these are very difficult to identify.

l. Write the password generated for the client on the printed form.

m. Change the scheduling access from an N to the letter Y.

n. Click on the Edit Client Password tab at the top of the screen

o. Click on the View Client at the top of the page and select the Client Menu again.

p. Inside the Client Menu drop down box select the "View Client User"

Note: If the client already has a current admin user DO NOT add the request. Send the current admin user the Online Request Advice doc. email.

q. Click on the 

r. Enter the requested information. The client's user name is ***ALWAYS*** defaulted as the word "admin".

s. Click the ADD User at the bottom of the page to save the information.

t. Sign your initials on the printed form verifying who entered the information.

u. Send the client their username and password using the Online Scheduling Email doc. to the email address provided on the form.

Note: Always attach the Online Scheduling tutorial and a Pre registration form for both locations in the email.

v. All paperwork is submitted to Accounting once the request is processed. Baytown employees will submit any new client forms in an email to accounting accounting@istc.net along with their daily deposit paperwork.

K. Screening Administrator Change

When a client requests to have an individual removed or changed from their background account the following details should be presented in a letter of request to the background department. **Contacts in Primus should never be updated by any department prior to receiving this information.**

Note: This letter must be on <u>A COMPANY LETTERHEAD</u>

- The clients background account number
- The individuals name who should be removed

- The individual who will be the new contact and that individual’s title, phone, and email contact information.
- The letter must be signed by the President, Vice President, or the individual who originally opened the account.

Once the letter is received the background department will update Primus and forward the information to the vendor. The background department will contact the new Screening Administrator and notify them of the change.