PerfectServe®: iPhone App User Guide
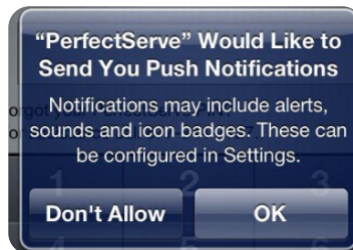
Initial Download

1. Search your App Store for "PerfectServe" and install.
   a. You will need your Apple ID and password.

2. Once downloaded, open the app and choose "OK" when asked if you would like <u>to receive mobile push notifications.</u>**
   **If you do not accept push notifications, you will not receive the "pop-up" to remind you of any unread messages in your secure messages inbox.

3. Log in to the app.
   a. Your username and password are provided by PerfectServe. If you do not already have this information, please call our Help Center at 877.844.7727.
   b. You will be asked to create a new password; it must be at least 8 characters, including a number and a capital letter.
   c. You must also set your personal PIN (unless you have previously set your PIN).
      i. Once inside the app, go to "Profile," then choose "PerfectServe PIN." Then enter the 4-digit PIN of your choice.
      ii. Tap the "Save" button in the upper right hand corner.

4. Input your personal cell phone number, which is required for verification purposes. Enter your number and tap save in the upper right hand corner.
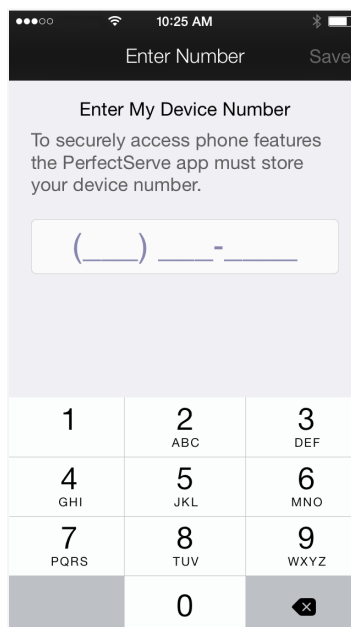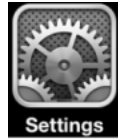
Notifications Setup

PerfectServe will notify you every time you have an unread secure message.
A typical notification sequence is:

- At the time the message is received – push notification
- 15 minutes after the first alert – push notification
- 30 minutes after the first alert – call to your mobile device

NOTE: If at any time during the alert sequence you check your message, you will not receive subsequent notifications.
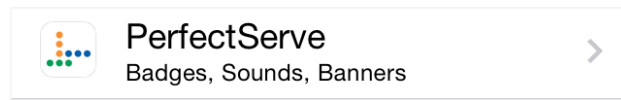
1. Go to iPhone Settings on your phone (not in the PerfectServe app).


2. Choose "Notification Center."

3. Choose "PerfectServe."

4. Then, choose "ALERTS."**
   **If this is not set to "On," you will not receive the "pop-up" to remind you that an unread message is waiting in your secure messages inbox.
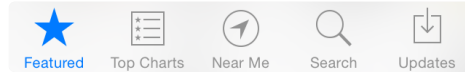   a. Be sure your settings match the below criteria:
      i. Notification Center: On
      ii. Show: 5 Recent Items
      iii. Alert Style: Alerts
      iv. Badge App Icon: On
      v. Sounds: On
      vi. View in Lock Screen: On
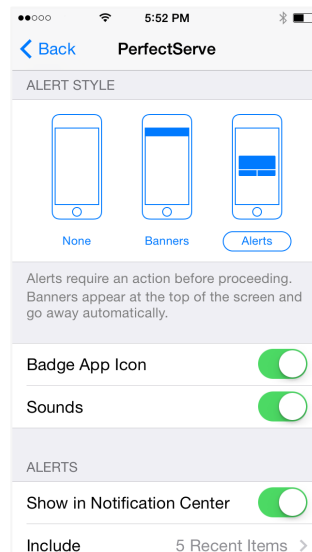
Updating an Existing App

1. Choose "Updates" in the bottom right corner.

2. Enter Apple ID and password if requested.

3. Allow app to download.

User Tips: Contacts

Refreshing Contacts List

To refresh your list of contacts in the "Contacts" tab, hold your finger on the screen, drag down and release. "Last Updated" will reflect the date and time of the last refresh. PerfectServe will automatically refresh your directory every 24 hrs.

Favorites

Once you select a colleague's name from the directory, you may also choose to make them a "Favorite." Creating a list of favorites allows you to quickly access the colleagues you contact most often. To add a colleague to your favorites, select their contact then tap on the star. Select the "Favorites" tab from your "Contacts" screen and your favorites list will appear.

Filter

You may enter a contact name in the search bar to filter.

**Creating Favorites**   **Filtered Search**
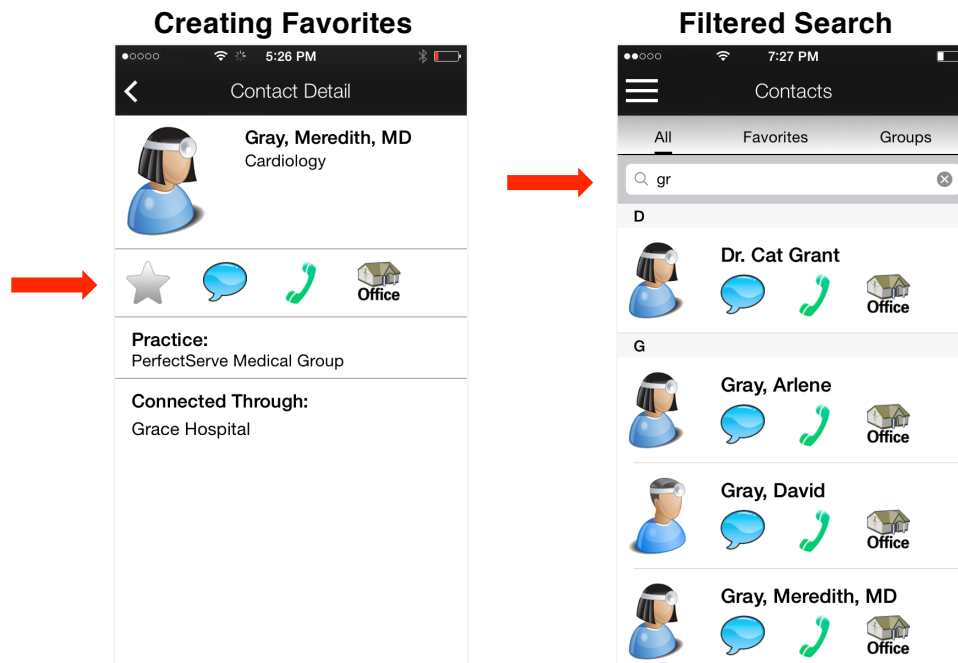
Creating Groups

You now have the ability to create and save custom groups.

1. To create a group, navigate to the "Contacts" tab and select "Groups." Tap the "+" symbol in the top right hand corner.
2. Name your group and then tap the "+" symbol.
3. You will be presented with a list of colleagues, select the ones you want to include in your group and tap "Add Selected."
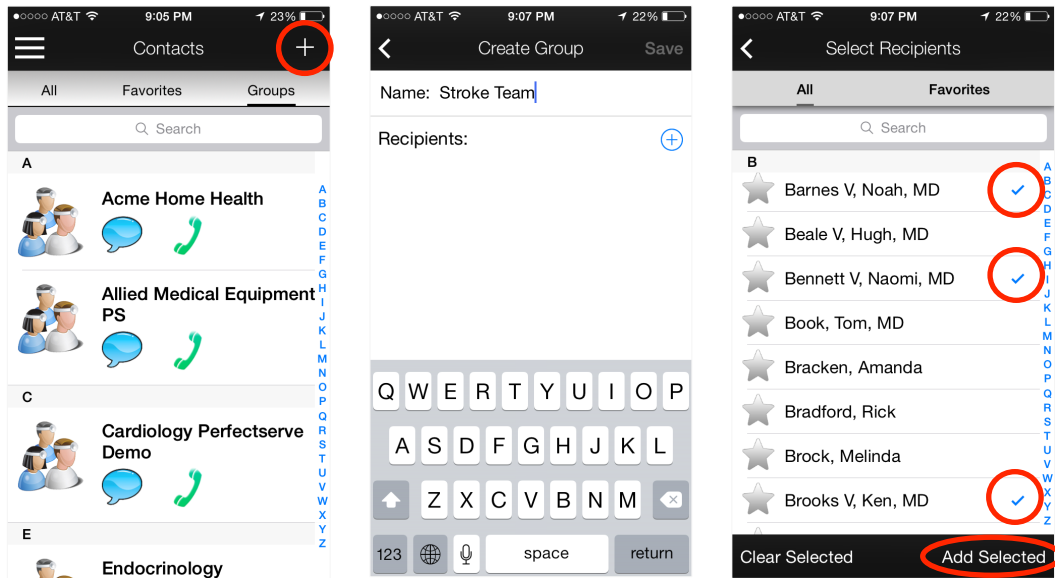
4. To initiate a message to your group, go to the "Groups" tab and search for the group name.
5. Tap the blue bubble and you will be presented with a standard message screen. Type your message and tap send.
   a. Remember, you can include **voice recording** or **photo** attachments by clicking on the paperclip in the top right hand corner of the screen.
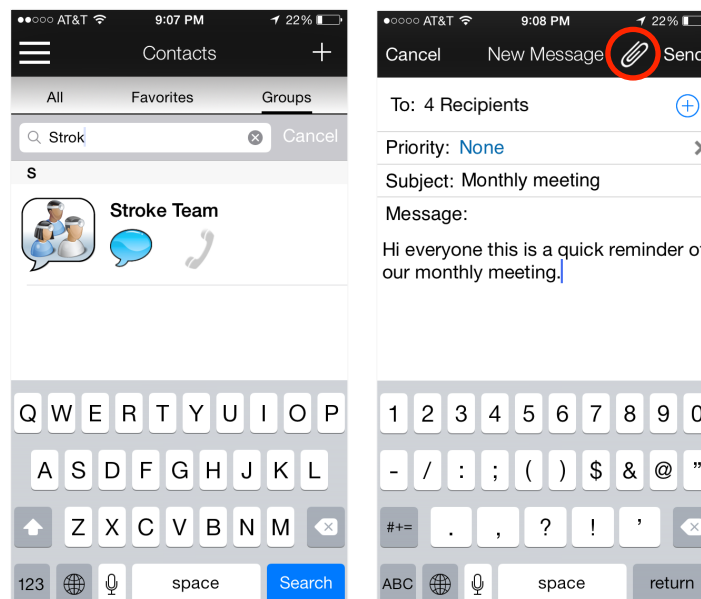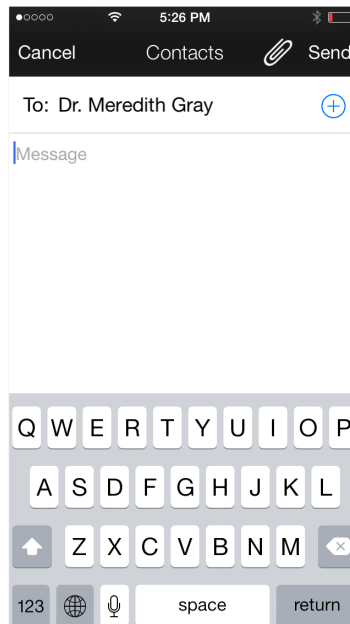
User Tips: Secure Messages
Sending a Message
1. Choose your contact and then tap the text bubble icon.
2. User the paperclip icon in the top right hand corner of the screen to attach voice messages and photos.
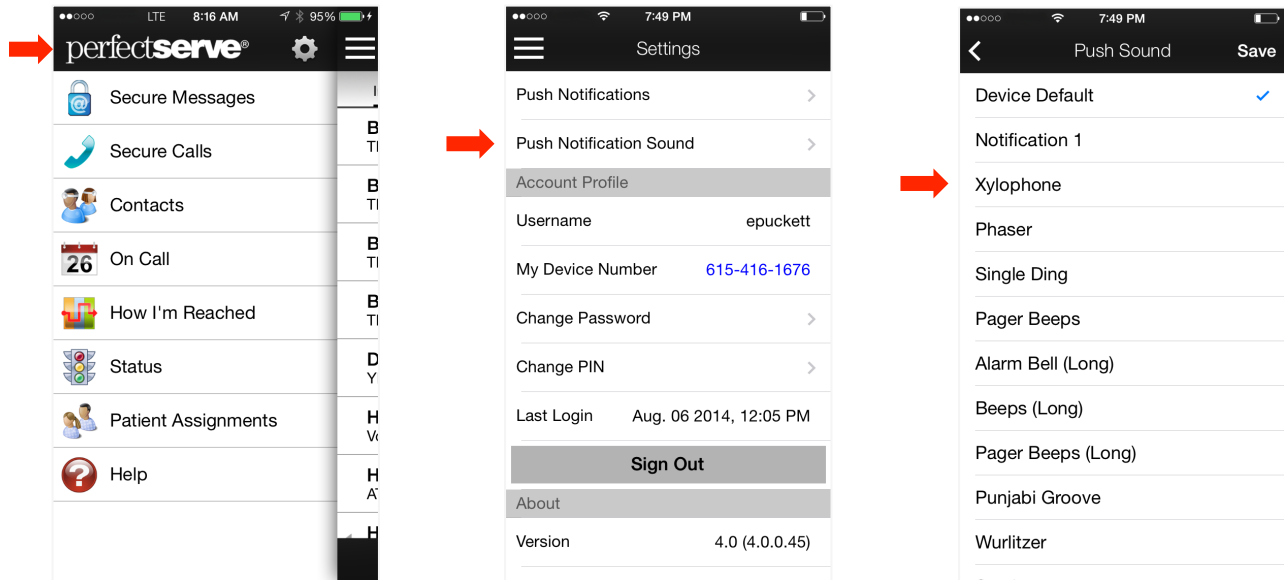

Secure Messages Inbox
1. Blue Dot – Indicates a new message.
2. Paperclip – Indicates message includes a picture or voicemail.
3. Folders – "Inbox," "Sent" and "Deleted" show the respective message type.
4. Edit – Will allow you to delete multiple messages at once.
5. To Refresh – Swipe down.
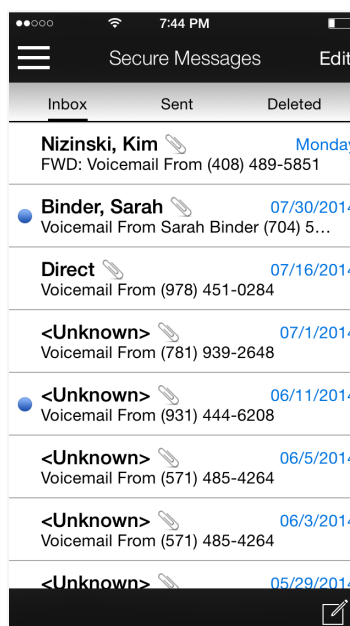
How to change PerfectServe Sound Notifications
1. Open the PerfectServe app. You will need to enter in your 4-digit pin.
2. Once the app is open, select the Settings gear in the top right corner.
3. Select "Push Notification Sound."
4. Then, select the sound you prefer for PerfectServe messages.

How I'm Reached
If you have several contact methods (e.g., phone call and secure message), you can change your contact method in this section of the app.

Status
If you have statuses for different situations or circumstances, this is where those schedules will be presented (e.g., if you have an "In Surgery" status that routes your calls to the surgery desk while you are in a procedure).

Getting Help!
Select the "Help" button on the bottom of your screen. From here, you can access the FAQ, see what's new and call or email our 24/7 Help Center staff.