

USPT-Rehab.com

WEBSITE USER MANUAL

US Rehabilitation & Health Services

For patients, office staff, and management

Prepared by GeekTechCenter.com LLC (GTC) | October 10, 2026

Version 02 — Pre-launch working edition. Procedures reflect the project configuration discussed to date; staff should verify live behavior, office availability, permissions, and privacy controls before operational use.

At a glance

- Public website: <https://uspt-rehab.com>
- Primary audiences: prospective patients, current patients, front-desk staff, management and authorized administrators
- Key features: Ask-Emily, clinic locator, service pages, Matterport tours, guided MP4 tours, appointment requests, NextPhone integration and management dashboard
- Important distinction: an appointment request is not a confirmed appointment until approved by the applicable office.

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1. Introduction and website purpose

The USPT website is designed to help visitors understand available rehabilitation services, identify the most appropriate clinic, explore facilities, ask questions in multiple languages, and submit inquiries or appointment requests. The website also supports staff review of incoming information.

Roles

- Visitors and patients: browse services, explore clinics and submit questions or requests.
- Office staff: review and respond to assigned inquiries and confirm appointments through approved office processes.
- Management and authorized administrators: monitor dashboard activity, review failed requests, and coordinate follow-up.

The website and AI assistants provide information and intake assistance; they do not replace clinical judgment, medical advice, emergency services, or office confirmation of appointments.

2. Public website navigation

1. Open <https://uspt-rehab.com> in a modern browser.
2. Use the main navigation to reach Home, About, Services, Locations, Contact and other available pages. Menu wording may vary by device or during pre-launch revisions.
3. Use the service pages to learn about treatment categories and location-specific offerings.
4. Use the Contact page or available inquiry controls to contact USPT.
5. On a phone, open the mobile menu and verify the same key links are accessible.

What to look for

- Prominent links to find a clinic and request an evaluation.
- Information about services, insurance and office locations.
- Ask-Emily access and educational tour options.
- Privacy and terms links in the footer.

3. Ask-Emily AI assistant

Ask-Emily is a conversational guide intended to answer common questions and help visitors discover relevant website content. The planned language experience includes English, Spanish, Arabic, Japanese and Chinese; availability and translations must be tested on the live site.

6. Open Ask-Emily using the assistant control or dedicated page.
7. Type a question in ordinary language, such as “Which location is nearest to me?” or “Do you offer aquatic therapy?”
8. Where offered, select or use the preferred language and continue the conversation.

9. Follow links or guidance to a relevant service, clinic, tour or contact option.
10. For scheduling, medical, insurance or office-specific answers, verify important details with the clinic.

Examples

- “Find my nearest location.”
- “Which clinic offers aqua therapy?”
- “Show me a tour of the Ypsilanti office.”
- “How do I request an evaluation?”

Do not enter Social Security numbers, full medical histories, or other unnecessary sensitive information in a general AI chat. The assistant should not diagnose conditions or promise appointment availability.

4. Find a clinic and review services

11. Choose Locations or the Find Nearest Location control.
12. Enter a city, ZIP code, or use a location option if presented and permission is appropriate.
13. Review the resulting clinic cards, addresses and contact details.
14. Open the clinic page to inspect location-specific services and any available tour.
15. Call or contact the office to confirm hours, accessibility, service availability and scheduling.

Specialty equipment or services may be offered only at selected offices. For example, project specifications identify aqua therapy and anti-gravity treadmill therapy with the Dearborn–Greenfield location; confirm current availability before directing a patient.

5. Virtual tours and MP4 guided videos

USPT includes immersive Matterport 3D experiences and guided MP4 video tours to familiarize visitors with participating clinics.

Matterport 3D tour

16. Open the relevant clinic or virtual tour page.
17. Select the 3D tour and wait for it to load.
18. Use on-screen navigation to move through spaces; rotate the view to look around.
19. On mobile, use touch gestures where supported.

Guided MP4 video tour

20. Select the guided video tour for the desired office.
21. Press Play and use standard pause, volume and full-screen controls.
22. Where a language-specific tutorial is offered, select a language and confirm the correct narration/video loads.

Pre-launch test: confirm each language selector loads the matching tour tutorial rather than defaulting to English.

6. Appointment request process

The website's Book Evaluation feature has been configured to submit appointment requests and interact with a Microsoft Outlook calendar workflow. Earlier testing confirmed successful calendar creation in a test scenario, but each office must be separately validated before launch.

23. Select Book Evaluation or the relevant appointment control.
24. Complete required contact information, preferred office and requested date/time as displayed.
25. Review the request carefully and submit once.
26. Watch for the on-screen success or error message.
27. Wait for staff confirmation; the requested time is tentative and subject to office approval.

Staff responsibilities

- Review new appointment requests in the authorized dashboard.
- Check the requested office's actual calendar and availability.
- Contact the requester to confirm, change or decline the tentative time.
- Investigate records marked Failed and ensure they receive follow-up; do not assume a failed calendar sync means the patient did not submit a request.
- Avoid creating duplicate appointments when retrying a failed integration.

Technical note for administrators: the appointment_requests records include a calendar_status value (such as Sent or Failed) and may store a Microsoft event identifier. A Sent integration status is not itself proof of patient-facing confirmation.

7. NextPhone AI telephone experience

NextPhone is intended to answer calls, provide common information, collect relevant inquiry details and route calls or alerts according to USPT's configured workflow. Final routing rules, hours, office mappings and integration status must be confirmed.

28. A caller reaches a USPT number configured for NextPhone.
29. The AI asks the purpose of the call and gathers only necessary information.
30. Based on the configured rules, it answers routine questions, routes the call, or captures a follow-up request.
31. Assigned staff review the notification or call summary and follow up as needed.

Recommended verification

- Test a new-patient call, an existing-patient call and an after-hours call.
- Confirm correct destination for each office and department.
- Confirm staff alerts and contact details are accurate.
- Confirm English and Arabic behavior for the initially discussed phone deployment; do not assume all website languages are enabled on the phone system.
- Verify that any transcript, recording or integration containing patient information meets approved privacy and vendor requirements.

8. Staff dashboard and daily review

The website includes an administrator dashboard intended for authorized personnel. Its discussed sections include contact form submissions, Ask-Emily conversations and appointment requests, including failed requests. Actual permissions and visible sections should be verified against the deployed version.

32. Open the administrator login through the approved management entry point.
33. Sign in using your individual authorized credentials; never share passwords.
34. Review Contact Form Submissions for unanswered inquiries.
35. Review Ask-Emily Conversations for questions requiring human attention.
36. Review Appointment Requests, paying special attention to Failed status.
37. Assign each item to the responsible staff member and document follow-up in the approved system.
38. Sign out after use, particularly on shared workstations.

Suggested daily cadence

- Opening: review overnight calls, messages, forms and failed appointments.
- During business hours: check new inquiries at intervals determined by management.
- Closing: reconcile outstanding items, document ownership and identify urgent next-day follow-up.

9. Inquiry workflow: website to Basecamp to WebPT

The intended operating concept is to bring inquiries from the website, Ask-Emily, NextPhone and other channels into a coordinated intake process. Emily's existing workflow has involved manual entry into Basecamp; automation has been discussed but should not be described as deployed until built and tested.

Proposed workflow

39. Capture a prospective patient inquiry from an approved source.
40. Route only the minimum necessary details to an authorized intake queue or CRM.
41. Review the request and assign it to the appropriate office or staff member.
42. Create or update a Basecamp task only if the approved workflow and privacy review permit it.
43. After staff review and proper patient intake, enter appropriate clinical or patient-record information into WebPT using authorized procedures.
44. Record follow-up outcome and unresolved tasks without unnecessarily duplicating sensitive data.

Basecamp is not assumed to be a clinical record. WebPT is the intended patient-file destination in the proposed process; the exact office-level WebPT configuration, permissions and integrations remain to be confirmed. Do not transfer protected health information into an unapproved platform.

10. Privacy, HIPAA and access safeguards

- Use unique accounts, role-based access and strong authentication for staff systems.
- Collect only information needed for the requested service or follow-up.
- Do not place detailed diagnoses, treatment notes or unnecessary identifiers in general website messages or AI chats.
- Before transferring patient information through NextPhone, Basecamp, analytics, AI tools or other vendors, verify appropriate HIPAA review, business associate agreements where required, and access controls.
- Use approved secure communication channels for protected information.
- Escalate suspected exposure, misrouting or unauthorized access promptly under USPT policy.
- Confirm the site's Privacy Policy, Notice of Privacy Practices and Terms of Use are accurate and approved by USPT before launch.

This manual is operational guidance, not a legal determination of HIPAA compliance. USPT's designated privacy/security leadership should approve workflows and vendor relationships.

11. Troubleshooting and escalation

Issue	First check	Next action
Ask-Emily not responding	Refresh page; check connection	Capture page/time and escalate to GTC
Wrong language on tour	Reselect language; reload	Record selected language and video URL
Clinic locator gives no results	Try city or ZIP; check spelling	Verify clinic list and report issue
Appointment appears unsuccessful	Check screen message and dashboard	Check Failed requests; contact office; avoid duplicate
NextPhone routes incorrectly	Note caller scenario, time and destination	Escalate routing configuration to administrator
Dashboard login fails	Verify approved account and login URL	Contact authorized site administrator
Video/3D tour will not load	Check network and browser	Test alternate device and report clinic/page

For technical support, contact GeekTechCenter.com LLC through the established project support channel. General GTC telephone: (855) 836-0500. For patient care or appointment confirmation, contact the appropriate USPT clinic directly.

12. Quick-reference procedures and pre-launch checklist

Patient: request an evaluation

45. Open the website and find the desired clinic.
46. Select Book Evaluation and submit the requested details.
47. Wait for office confirmation before treating the time as booked.

Staff: handle a new inquiry

48. Review the dashboard or approved NextPhone notification.
49. Identify the correct office and owner.
50. Follow up using approved channels and record the outcome.
51. Escalate failed appointment synchronization or sensitive-data issues.

Management: pre-launch acceptance checklist

- ☐ Navigation works on desktop and mobile.
- ☐ All clinic names, addresses, telephone numbers and office-specific services are accurate.
- ☐ Find Nearest Location returns appropriate results.
- ☐ Ask-Emily responses and links are tested in English, Spanish, Arabic, Japanese and Chinese.
- ☐ Matterport and MP4 guided tours load for every published office.
- ☐ Language-specific tour tutorials switch correctly.
- ☐ Website appointment requests are tested separately for each office and calendar.
- ☐ Success and failure statuses are visible and staff can follow up.
- ☐ NextPhone call routing, after-hours handling and alerts are tested.
- ☐ Dashboard login, role permissions and logout are verified.
- ☐ Contact submissions and conversation records are reviewed end to end.
- ☐ Basecamp/WebPT workflow and HIPAA/vendor approvals are documented before any live PHI transfer.
- ☐ Privacy, HIPAA notice and terms pages have management/legal review.
- ☐ Staff receive training and know the escalation contact.

13. Patient intake, system integration and staff access management

Status: Design and validation chapter for Version 02. This section describes a proposed workflow, not a confirmed production integration. USPT-REHAB management must verify actual procedures, vendor capabilities, access rights and applicable privacy agreements before implementation.

13.1 New-patient entry and source of record

New inquiries may originate from the website contact form, appointment request, Ask-Emily, NextPhone, direct telephone calls, or walk-in/staff entry. A dedicated New Patient / New Inquiry form in the USPT-REHAB dashboard is proposed for staff-entered contacts; it has not yet been implemented.

Determine whether Basecamp is used for intake task tracking and follow-up, and whether WebPT is the authoritative patient registration and clinical record. Do not assume Basecamp is the clinical record or that automated transfer to WebPT already exists. Confirm which office or staff member creates and validates each record.

13.2 Initial information flow — proposed test model

The following is an initial process map for joint review, not evidence of live data connections.

1. Inquiry sources	Website / Ask-Emily / NextPhone / staff manual entry
↓	
2. USPT-REHAB intake layer (proposed)	Validate required fields, consent, duplicate check, source, location and follow-up status
↓	
3. Basecamp (subject to review)	Create/assign intake follow-up tasks only if approved for the data involved
↓	
4. WebPT (subject to review)	Authorized staff verify and register patient in the clinical system
↓	
5. Status feedback	Record outcome and follow-up status without unnecessarily replicating sensitive clinical data

Test cases: (A) website appointment request; (B) Ask-Emily inquiry; (C) NextPhone call; (D) staff-entered walk-in; (E) duplicate inquiry; (F) failed delivery or unavailable integration. Verify ownership, timestamps, office routing, staff notification, data accuracy and error recovery for each.

13.3 Shared knowledge base: Ask-Emily and NextPhone

Proposed design: maintain one approved USPT-REHAB master knowledge base covering office locations, hours, services, insurance, FAQs, scheduling instructions and language variants. Ask-Emily would read the master source; NextPhone could use a direct retrieval/API integration if supported, or receive controlled synchronized updates. Confirm account-level vendor capabilities before selecting a method.

Knowledge-base content should be operational information only. Do not mix patient records, call transcripts or protected health information into the shared public-facing knowledge base. Establish an update owner, approval date, version identifier and a cross-channel consistency test.

13.4 Dashboard, transcripts and audit trails

The current dashboard provides operational information and conversation/appointment records. Proposed permissions should distinguish viewing a record from editing it, downloading it, or administering accounts. Read-only access does not prevent copying, screenshots or external recording. Transcript access should be restricted to authorized staff with a work-related need.

- Log successful and failed sign-in attempts, explicit sign-outs, user account changes, and access to sensitive inquiry or transcript records.
- Log transcript exports/downloads where technically possible, including user, time and record identifier.
- Define administrator, manager and office staff access by assigned location and responsibility; review retention and audit-log access.
- Use individually assigned accounts and securely hashed passwords when the access model is finalized; never store plaintext passwords.

13.5 Why the login redesign is deferred

Before replacing the existing dashboard authentication, review the actual Basecamp and WebPT sign-in models, office-level permissions, user provisioning, and integration requirements. Preserve existing controls until a tested replacement is ready. Do not reuse staff passwords across independent applications or assume single sign-on exists.

13.6 Privacy and integration gates

- Map the minimum necessary fields for each transfer and identify which systems hold identifiable patient information.
- Verify HIPAA applicability, Business Associate Agreements and vendor security requirements before sending patient information to any third-party system.
- Confirm Basecamp integration options and whether WebPT supports the required account-specific intake method or API.
- Review transcript storage, encryption, retention, authorized access, copy/download controls and incident procedures.
- Test failure handling and reconciliation before enabling automated writes to Basecamp or WebPT.

13.7 Joint workflow validation session

Participants: USPT-REHAB management, intake/office staff, and GTC technical team. Demonstrate one real-world but non-sensitive test inquiry through each intake channel. Observe Basecamp entry, WebPT registration, user permissions, duplicate handling and staff follow-up. Document confirmed steps, gaps, owners and sign-off before finalizing integrations or user roles.

Document control and sign-off

Version: 02 | Status: Working draft — pending USPT-REHAB workflow and integration validation

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Approval: _____ Date: _____