Auto Dialer

The Auto Dialer functionality is an automated call management system in which clinic appointment reminder data can be set up and maintained at the Local Agency level. The **Auto Dialer** screen is located in the 'Scheduling Tasks' jellybean within the ADMIN module.

	* Local Agency: 010000 Neighborhood Health Clinics, Inc.								
	Run	Job Name	Description	Last Run					
•	V	All Clinic Call	Calls for all appointment types						
		Cert Apointments	Call for certs						
	nlav	Add		<u> </u>					
	spiay	Aud							
				<u>Save</u> <u>Cancel</u> C <u>l</u> ose					

The Auto Dialer screen displays all existing jobs which have been added for the selected Local Agency. A job will run at 7:30am daily to generate a file that a 3rd party vendor will process, making the reminder calls between 10am and 3pm. When the 'Run' checkbox associated with the job is checked, the process will include any appointments that meet the selected criteria. When 'Run' is unchecked, the job is 'turned off' and will not be run during the processing window. However, the job still appears as a saved job on the Auto Dialer screen and may be set to 'Run' again in the future if desired.

The fields on the Auto Dialer screen are described below:

- > <u>Run</u>: when checked, the job is set to run during the Auto Dialer processing.
- > Job Name: the name of the Job; this field is entered by the user when the job is added.
- <u>Description</u>: the description of the job; this field is entered by the user when the job is added.
- Last Run: shows the date the job was last run; this field is updated each time the job is run.
- # <u>Records</u>: the number of appointments that met the job criteria and were transmitted during the Last Run
- > <u>Agency</u>: displays the number of the Local Agency to which this job has been added
- > <u>Clinics</u>: displays the number of all clinics for which this job is set to run
- > <u>Appt Types</u>: displays a list of all appointment types for which this job is set to run
- > <u>Days</u>: displays the day(s) of the week that the job is set to run
- > <u>Run Time</u>: the actual time the job was last run

No Phone									
	*Area Code	*Phone	Comment	Prefer	No Calls	*Phone Type	Txt Msg		
	(410)	554-8948				Cell Phone			
	(443)	446-9256	only call if urgent			Work Phone			
	Add	Remove							

If a single phone number is entered into the Phone grid, in the Clinic module, and the 'No Calls' checkbox is NOT checked, that phone number is dialed or texted when appointment reminders go out. The system will auto-detect if the number listed is a cell phone. If so, a text message will be sent instead of a call. As the system is currently configured, the 'Txt Msg' box has no relevance to the AutoDialer process and therefore, is for internal clinic purposes only. If a phone number is marked as 'No Calls', then no reminder will be sent. The 'No Calls' box must be checked if a client wants to opt out of the AutoDialer process.

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* Job: Al	* Job: All Clinic Call					Run: 🗹			
Description:	alls for all ap	pointment types	;						
* Clinics:			Clinic Name			* Appt Types:		ApptTyp	
		010201 Neighbo	orhood Health Clinics, Inc.		\sim			BFC	$\mathbf{}$
		010205 United	010205 United Faith Wic Clinic				V	BFE	
		010210 Parkvie	w Hospital Campus					BI	
		010211 Parkvie	w North Campus Medical F	al Park #2				CERT	
	☑ 010212 St. Jose			h Hospital			V	FPC	
		010213 DuPont	Hospital					GROUP	
		011706 Dekalb	County Wic Program		~		V	HGB CK	\sim
	V	015707 Noble C	County Wic Program2			L	V	HRNEB	
* Schedule:	Арро	intment Day	Call On Day						
	Saturday		Friday						
	Friday		Thursday						
	Thursday		Wednesday						
	Wednesda	iy	Tuesday						
	Tuesday		Monday						
6		Dement							
	Add	Remove							
Data Saved Su	ccessfully					<u>S</u> ave	<u>C</u> ancel	Close	
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Add an Auto-Dialer Job:

- 1. Select the Auto Dialer screen from the 'Scheduling Tasks' jellybean
- 2. Select the agency from the *Local Agency* dropdown
- 3. Click the 'Go' button
- 4. Click the 'Add' button to display the AutoDialJob pop-up
- 5. Enter the name of the job in the Job field
- 6. Enter the Description of the job in the Description field
- 7. Check the 'Run' checkbox to enable the Auto Dialer job
- 8. Select the applicable clinic(s) from the 'Clinics' grid
- 9. Select the applicable Appointment Type(s) from the 'Appt Types' grid
- 10. Click the 'Add' button below the 'Schedule' grid
- 11. Select the day of the appointment from the 'Appointment Day' field
- 12. Click in the 'Call on Day' field and select the day of the week the appointment reminder should go out
- 13. Click the 'Close' button to save and close the popup

Display or Modify an Existing Job:

- 1. Select the Auto Dialer screen from the 'Scheduling Tasks' jellybean
- 2. Select the agency from the *Local Agency* dropdown
- 3. Click the 'Go' button
- 4. Select the desired row
- 5. Click the 'Display' button to display the AutoDialJob pop-up
- 6. Modify the job details, as needed
- 7. Click the 'Close' button to save and close the popup

Delete an Auto-Dialer Job:

- 1. Select the Auto Dialer screen from the 'Scheduling Tasks' jellybean
- 2. Select the agency from the 'Local Agency' dropdown
- 3. Click the 'Go' button
- 4. Select the desired row
- 5. Click the Remove button
 - A validation message display asking "Are you sure you want to delete the selected job?"
 - Click Yes if you wish to delete the selected job
- 6. Save the screen