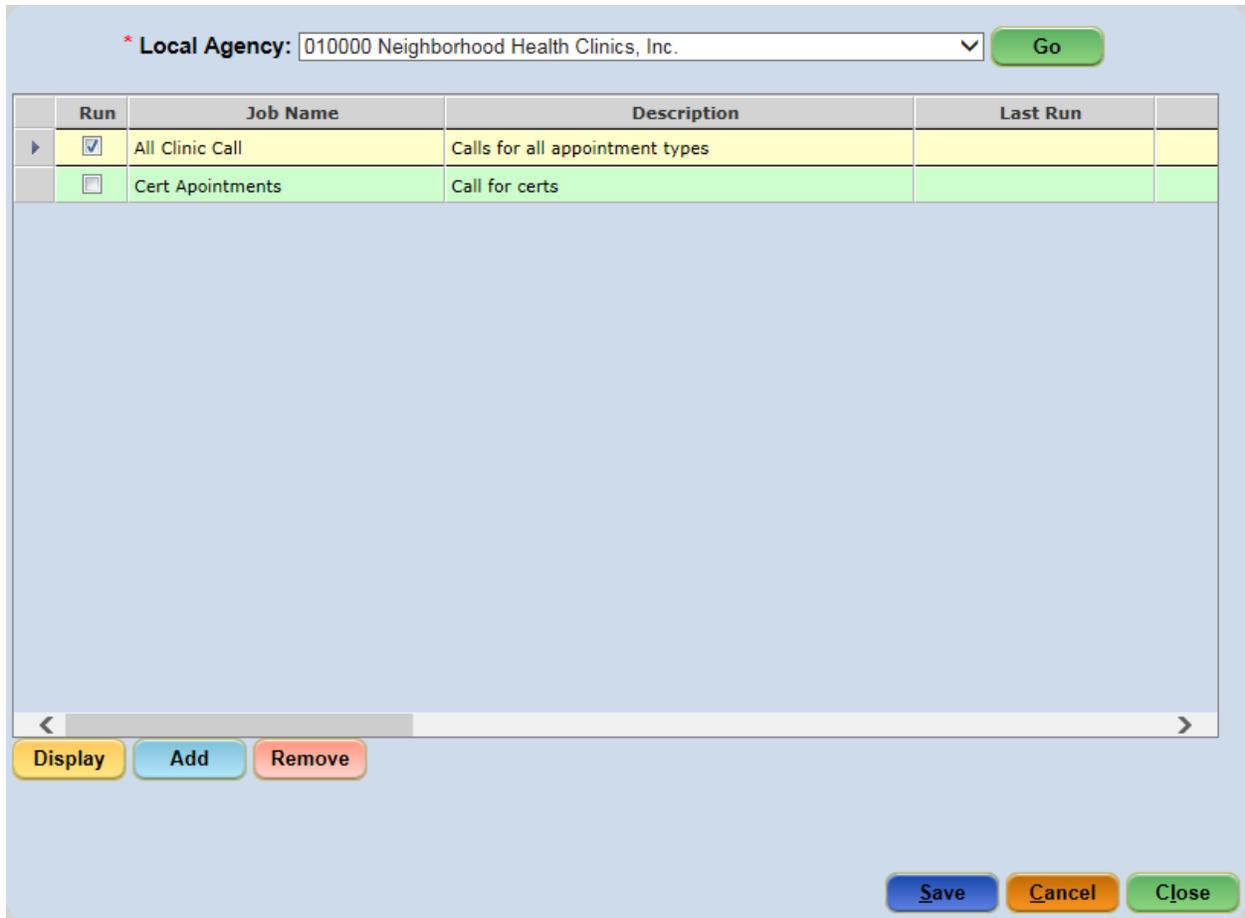## Auto Dialer

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.

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.
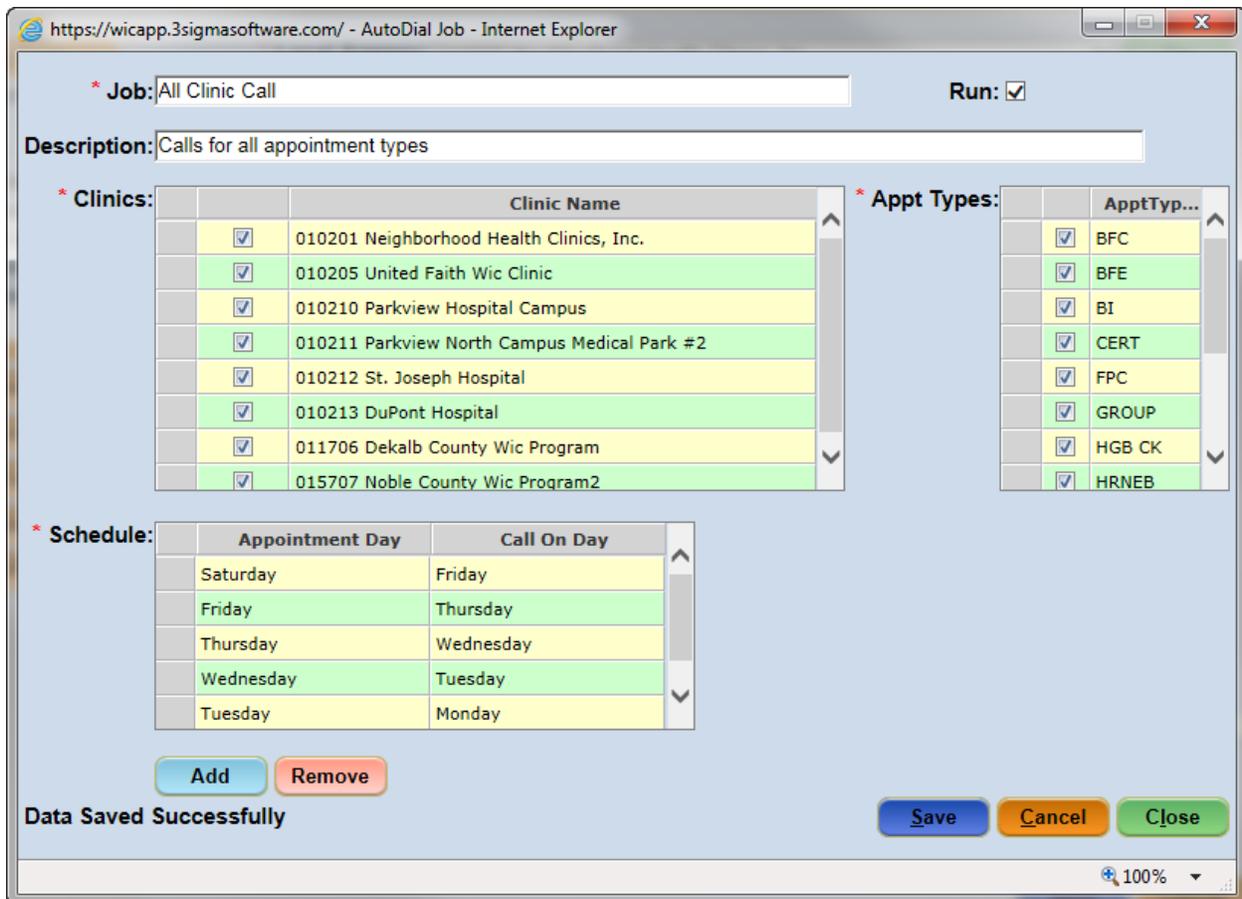
The fields on the **Auto Dialer** screen are described below:

➢ *Run*: 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.

➢ *Description*: 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.

➢ *# Records*: the number of appointments that met the job criteria and were transmitted *during the Last Run*

➢ *Agency*: displays the number of the Local Agency to which this job has been added

➢ *Clinics*: displays the number of all clinics for which this job is set to run

➢ *Appt Types*: displays a list of all appointment types for which this job is set to run

➢ *Days*: displays the day(s) of the week that the job is set to run

➢ *Run Time*: 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.

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