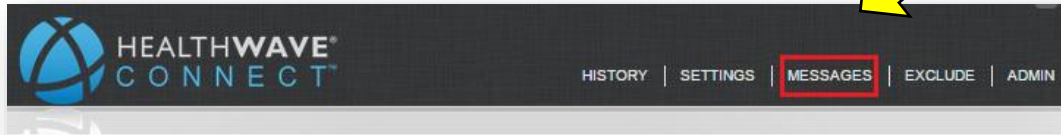
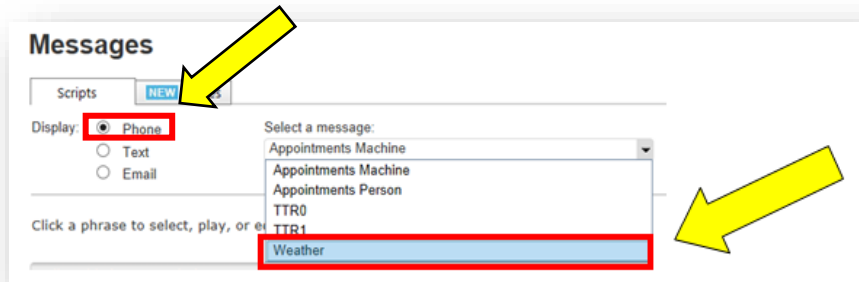


Step A: Verify your inclement weather message script

- 1a. Log into www.healthwaveconnect.com
- 2a. Click on the “Messages” tab



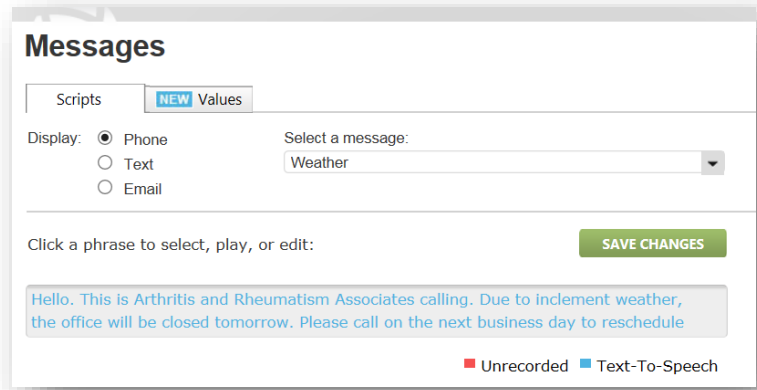
- 3a. Select the “Phone” radio button and then “Weather” OR “Rescheduled” from the message drop down list



- **NOTE: If you have more than one “Weather” or “Rescheduled” message in your job drop down please be sure to review the scripts for all Weather or Rescheduled jobs (i.e. “Weather Person” vs “Weather Machine” or “Rescheduled Person” vs “Rescheduled Machine”)**
- 4a. Edit the phone message script and then click the green “Save Changes” button
 - If you make many edits to the script you can preview the message to the right to ensure the message will read correctly
 - Please ensure your speakers are turned up so that you can hear the message

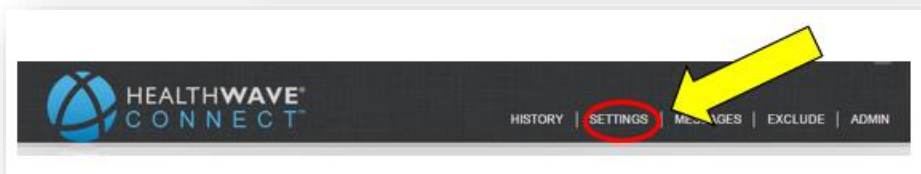
Step B: Verify the settings

- 1b. Navigate to “Settings” in Connect

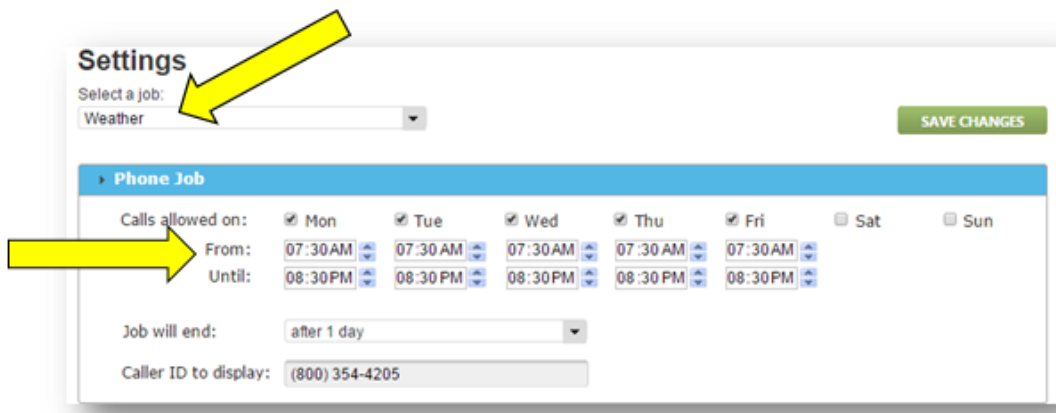


call time

from “Messages” HealthWave



- 2b. Select “Weather” or “Rescheduled” from the job drop-down list
- 3b. Verify the call window starts when you want to send the calls to start and ends late enough. If it doesn’t adjust the time frame accordingly for the day of the week you are sending the calls out.
- 4b. Select “Save Changes”

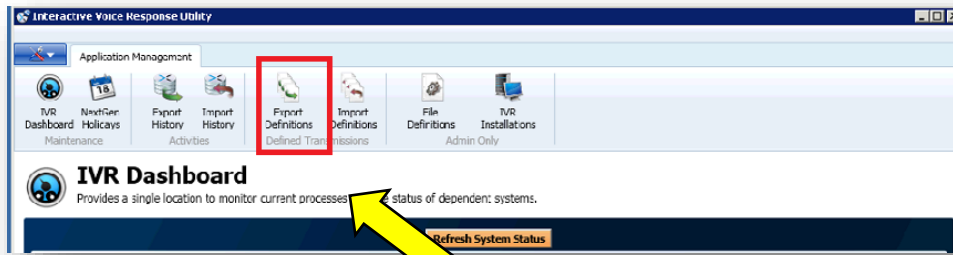


Step C: Generate the file of patients who need to be contacted.

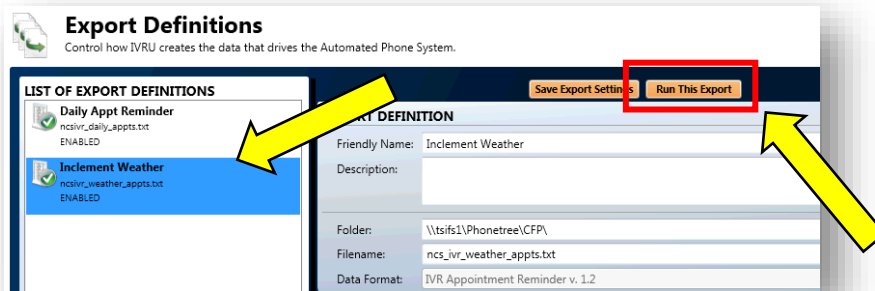
- 1c. Login to your TSI Cloud Website
- 2c. Click on the **IVRU icon shortcut**



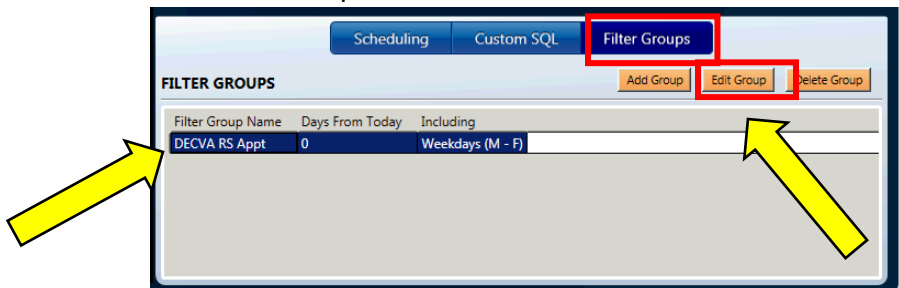
- 3c. Log-on with NextGen Username and Password
- 4c. Select “Export Definitions” in the top menu



- 5c. Select the “Inclement Weather” export definition and then click “Run this export”
 - If you need to send the “Rescheduled” export definition out instead then go to Step 6c



- 6c. For the “Rescheduled” definition follow these instructions prior to step 7c
 - If you only need to send the calls out for certain providers follow the steps below, if you plan to send the reschedule calls out for all appointments on a specific day proceed to step 7c
 - Select the Filter Groups option
 - Highlight the filter group to be modified
 - Click Edit Group

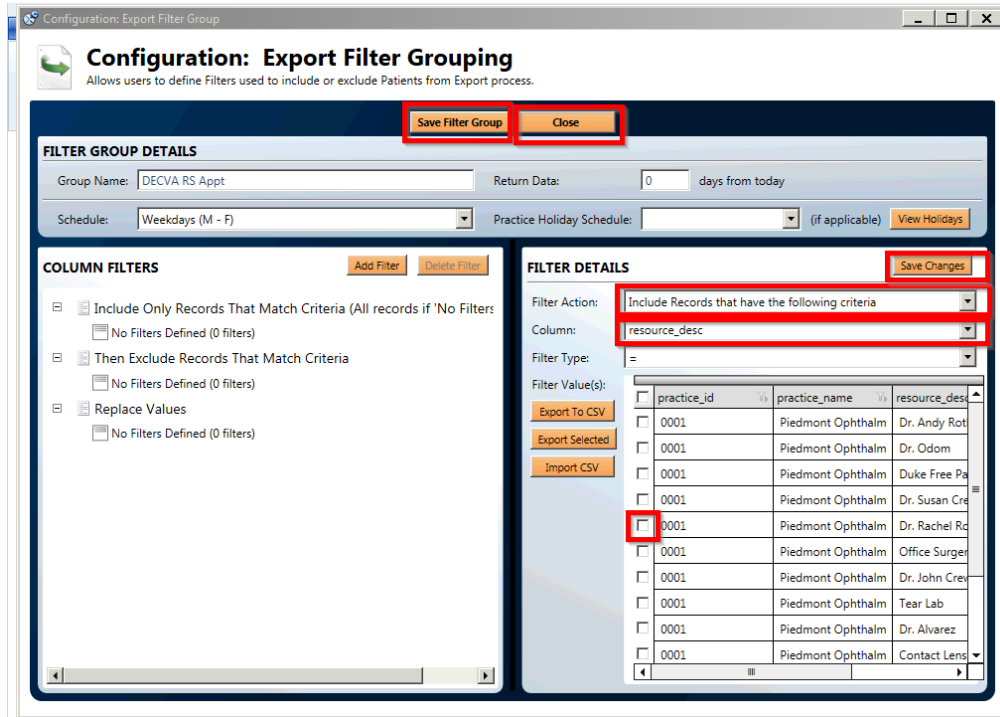


- Select Filter Action dropdown list and choose “Include Records that have the following criteria”
- Select Column dropdown list and choose “resource_desc”
- Leave Filter Type as =
- Select the checkbox by the provider that needs appointment rescheduled job run

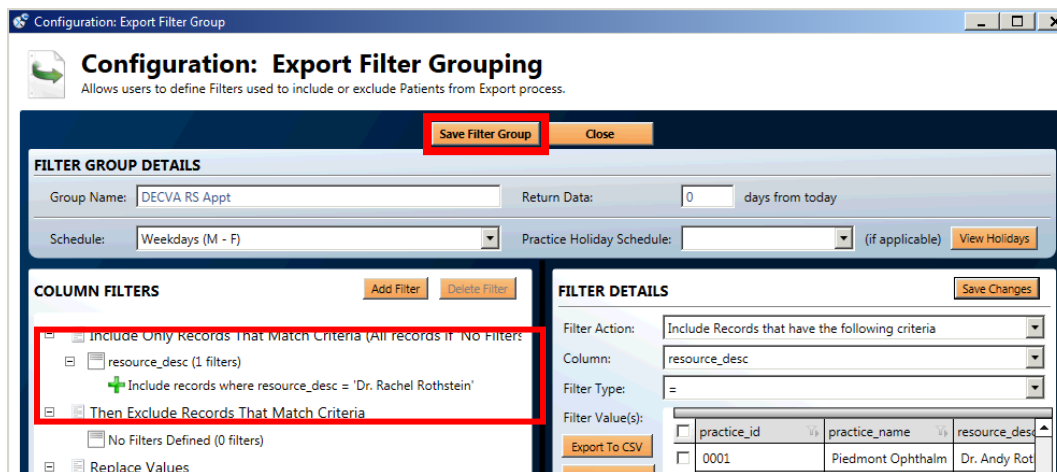


HOW TO: SEND INCLEMENT WEATHER or RESCHEDULED APPOINTMENT NOTIFICATIONS

- Click Save Changes

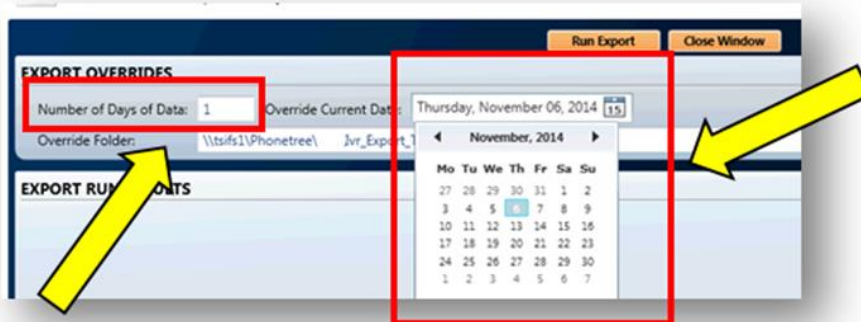


- Confirm that the provider to have appointments rescheduled shows in the Column Filters panel
- Click Safe Filter Group



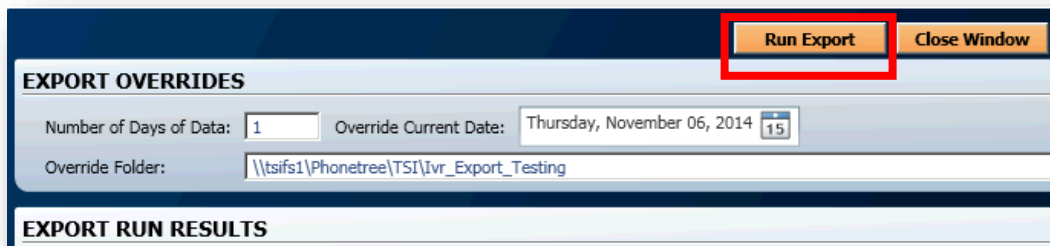
- Click Close
- Click "Run This Export"

- 7c. Select the date of appointments you need to contact



- If you only want to contact patients for the appointment date selected, enter “1” in “Number of Days of Data.”
 - For every additional date you want to contact, add one to the number of days of data.
 - EX: If you select Monday, Nov. 3rd in the override current date field and enter “3” days of data, the file will include all appointments for Monday (11/3), Tuesday (11/4), and Wednesday (11/5).
 - **NOTE: If you need to filter by appt time as well (see the last page for instructions)**

- 7c. Click “Run export”



- **NOTE: The “Override Folder” specifies that the file will be written to a testing folder. Therefore calls will not go out yet! If you make a mistake you can go back and review**

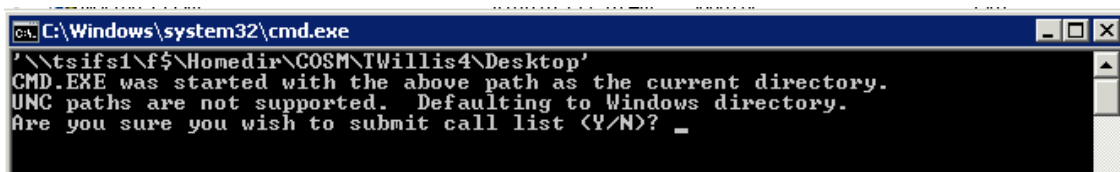
- 8c. View results under “Exported Run Results” section and confirm that the patients listed are those you wish to contact. This is your call file.
 - If the export run results does not contain the patients you want to contact repeat steps 1c-8c again.

Step D: Submit file to Phonetree

- 1d. Exit the IVR-U and go back to your Citrix **Applications** tab
- 2d. Double-click on the “PhoneTree_Inclement_Weather” or “PhoneTree_Rescheduled” batch file icon.



- 3d. Type “Y” in the screen below and click enter

A screenshot of a Windows command prompt window. The title bar reads 'ca. C:\Windows\system32\cmd.exe'. The command prompt shows the current directory as 'C:\tsifs1\fs\Homedir\COSM\TWillis4\Desktop'. It displays the following text: 'CMD.EXE was started with the above path as the current directory. UNC paths are not supported. Defaulting to Windows directory. Are you sure you wish to submit call list <Y/N>? _'. The cursor is positioned after the underscore.

- *****Note: Typing “Y” and clicking enter will automatically submit the call file generated in the IVR-Utility to PhoneTree HealthWave Connect. Only complete this step when you are 100% ready to contact patients*****
- *****Warning: Only click this icon when you are submitting an inclement weather job. Accidentally clicking this icon could cause unwanted calls to be sent to patients*****

Step E: Confirm Notification Delivery

- 1e. Wait a few minutes then log into www.healthwaveconnect.com
- 2e. Open the Weather or Rescheduled report and confirm that calls are successfully being delivered.
- 3e. **You're finished!!!!**

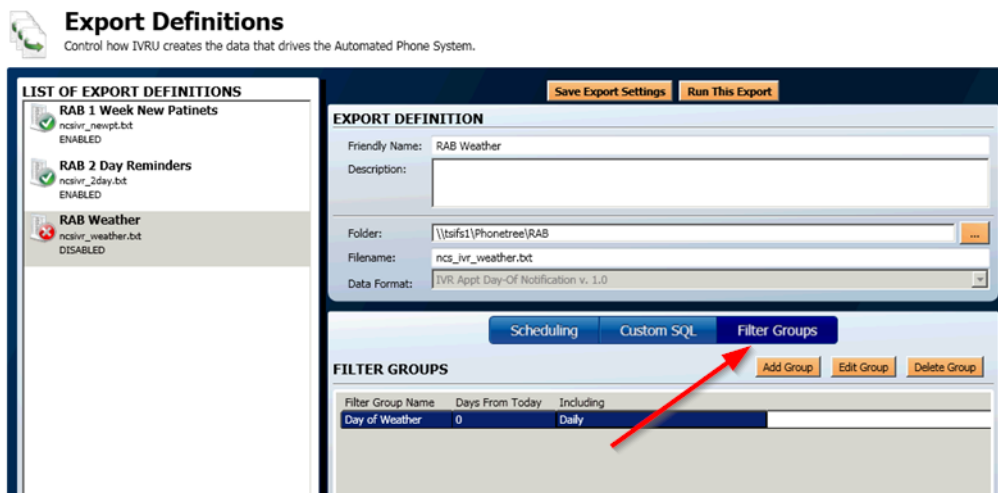
**Optional Step:

If you need to filter by appointment time complete the steps below prior to Step C

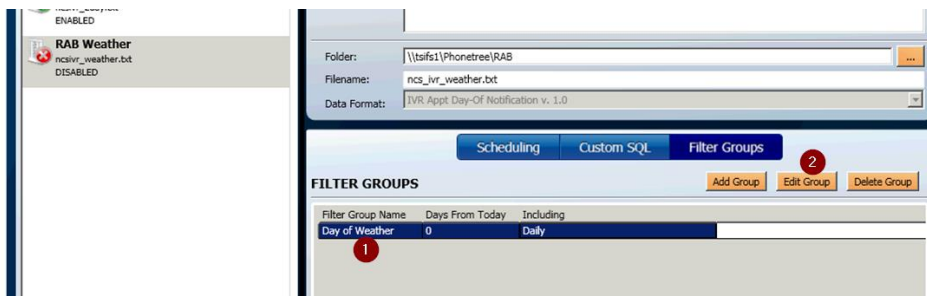
- 1. Login to your citrix desktop **Applications** tab, open your practice folder
- 2. Click on the IVR-Utility Icon



- 3. Log-on with NextGen Username and Password
- 4. Select “Export Definitions” in the top menu
- 5. Highlight the weather export definition
 - **Caution: be careful to NOT modify your regular appointment export definitions**
 - Corrections to regular export definitions may be billable
- 6. Select the Filter Groups Option



- 7. Highlight the Filter Group
- 8. Click “Edit Group”

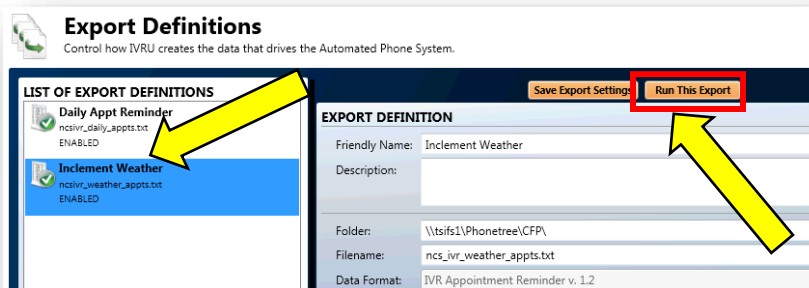


- For Filter Action, select “include records that have the following criteria”

- For Column select “appt_time_filter”
- For Filter Type chose the appropriate value (i.e. >, <, >=, <=)
- For Filter Value ensure you enter the time of appointment in military time
 - Ex. if you want patients to be called with appointments before 1:00pm enter 1300 instead of 100
- Then Click “Save Changes”



- **Note: To Remove a filter Once it’s applied: Highlight the filter and click “delete filter”**
- Then click “Save Filter Group” and “close”
- Select the “Inclement Weather” or “rescheduled” definition on the list of export definitions and click “Run this export”



- Follow the rest of the steps in Step C.