

#### Step A: Verify your inclement weather message script

<ul><li>1a. Log into www.healthwaveconnec</li><li>2a. Click on the "Messages" tab</li></ul>	xt.com
HEALTHWAVE CONNECT	HISTORY   SETTINGS   MESSAGES   EXCLUDE   ADMIN

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

Serietz UTST		
Display:  Phone	Select a message:	
O Text	Appointments Machine	•
O Email	Appointments Machine Appointments Person	
Click a phrase to select, play, or e	TTR0	
	Weather	

- NOTE: If you have more than one "Weather" or "Rescheduled" message in your job drop down please be sure to review the scripts for <u>all</u> 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



# HOW TO: SEND INCLEMENT WEATHER or RESCHEDULED APPOINTMENT NOTIFICATIONS



- o 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.
- o 4b. Select "Save Changes"

Settings							
Select a job: Weather		٠					SAVE CHANGES
> Phone Job							
Calls allowed on: From: Until:	<ul> <li>Mon</li> <li>07:30 AM</li> <li>08:30 PM</li> </ul>	✓ Tue 07:30 AM 08:30 PM ♥	✓ Wed 07:30AM 08:30PM	Thu       07 :30 AM       08 :30 PM	C Fri 07:30AM C 08:30PM C	🗆 Sat	🗆 Sun
Job will end:	after 1 day		٣				
Caller ID to display:	(800) 354-42	)5					

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

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





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

	lesponse Utility			
Application	Management			
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TVR NextGer ashboard Holicays	Export Import History History	Export Import Definitions Definitions	File IVR Definitions Installations	
IVR I     Provides a:	Dashboard single location to monitor	r current processes	status of dependent systems.	
Provides a s	Dashboard single location to monitor	r current processes	status of dependen: systems.	
IVR I Provides a :	Dashboard single location to monitor	r current processes	status of dependen: systems. Refresh System Status	

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

T DEFINI	TION
-	
Friendly Name:	Inclement Weather
Description:	
Folder:	\\tsifs1\Phonetree\CFP\
Filename:	ncs_ivr_weather_appts.txt
	Folder:

- $\circ$  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
  - o Highlight the filter group to be modified
  - Click Edit Group

		Scheduli	ng Custom SQL	Filter Groups
F	ILTER GROUPS			Add Group Edit Group Delete Group
	Filter Group Name DECVA RS Appt	Days From Today 0	Including Weekdays (M - F)	

- o 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 =
- $\circ$  Select the checkbox by the provider that needs appointment rescheduled job run



• Click Save Changes



# HOW TO: SEND INCLEMENT WEATHER or RESCHEDULED APPOINTMENT NOTIFICATIONS

Configuration: Export Filter Group Configuration: Export Filter Groupi Allows users to define Filters used to include or exclude Patients from Expor Save Filter Gr	
FILTER GROUP DETAILS Group Name: DECVA RS Appt Schedule: Weekdays (M - F)	Return Data: 0 days from today Practice Holiday Schedule: (if applicable) View Holidays
COLUMN FILTERS       Add Filter       Outloade Defined         Include Only Records That Match Criteria (All records if 'No Filter         No Filters Defined (0 filters)         Then Exclude Records That Match Criteria         No Filters Defined (0 filters)         Replace Values         No Filters Defined (0 filters)	FILTER DETAILS       Save Changes         Filter Action:       Include Records that have the following criteria       •         Column:       resource_desc       •         Filter Type:       =       •         Filter Value(s):       practice_id       •         Export 5 elected       0001       Piedmont Ophthalm       Dr. Andy Rot         0001       Piedmont Ophthalm       Dr. Andy Rot         0001       Piedmont Ophthalm       Dr. Susan Cre         0001       Piedmont Ophthalm       Dr. Rachel Re         0001       Piedmont Ophthalm       Dr. Susan Cre         0001       Piedmont Ophthalm       Dr. John Cre         0001       Piedmont Ophthalm       Dr. John Cre         0001       Piedmont Ophthalm       Dr. Alverez         0001       Piedmont Ophthalm       Dr. Alverez         0001       Piedmont Ophthalm       Dr. Alverez         0001       Piedmont Ophthalm       Const Less

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

😵 Configuration: Export Filter Group	_ <u> </u>
Configuration: Export Filter Groupin Allows users to define Filters used to include or exclude Patients from Export p	g vocess.
Save Filter Grou	p Close
FILTER GROUP DETAILS	
Group Name: DECVA RS Appt	Return Data: 0 days from today
Schedule: Weekdays (M - F)	Practice Holiday Schedule: (if applicable) View Holidays
COLUMN FILTERS Add Filter Delete Filter	FILTER DETAILS Save Changes
Include Univ Records That Match Uniteria (All records It IN) Filters	Filter Action: Include Records that have the following criteria
□ □ resource_desc (1 filters)	Column: resource_desc 🔹
	Filter Type: =
Then Exclude Records That Match Criteria	Filter Value(s):
No Filters Defined (0 filters)	Export To CSV
🗉 📃 Replace Values	Diedmont Ophthalm Dr. Andy Rot

- Click Close
- o Click "Run This Export"
- o 7c. Select the date of appointments you need to contact



	_						1	tun Expor	1	Close Window
PORT OVERRIDES										
Number of Days of Data: 1 Override	Current Dat :	Thurso	day,	Nov	emb	er (	6, 2	014 15		. /
Override Folder: \\tsifs1\Phonetree\	Jvr_Expert	•	N	over	nber	, 20	14			M
		Mo	Tu	We	Th	Fr	Sa	Su 🗖	_	
PORT RU		27	28	29	30	31	1	2		
		3	4	5		7	8	9		
		10	11	12	13	14	15	16		
		17	18	19	20	21	22	23		
		24	25	26	27	28	29	30		
		1	2	3	4	5	6	7		

- 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. 3<sup>rd</sup> 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)
- o 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 <u>does not</u> contain the patients you want to contact repeat steps 1c-8c again.



#### **Step D: Submit file to Phonetree**

- $\circ$   $\,$  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.



o 3d. Type "Y" in the screen below and click enter



- \*\*\*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

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



- o 3. Log-on with NextGen Username and Password
- 4. Select "Export Definitions" in the top menu
- o 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
- o 6. Select the Filter Groups Option

LIST OF EXPORT DEFINITIONS	Save Export Settings Run This Export						
RAB 1 Week New Patinets	EXPORT DEFINITION						
ENABLED	Friendly Name: RAB Weather						
RAB 2 Day Reminders ncsivr_2day.bt ENABLED	Description:						
RAB Weather	Folder Uthefet10henstea10A0						
DISABLED	Folder: I (USIS1/FIGHEURE/OKO						
	Deta Format: TVR Appt Day-Of Notification v. 1.0						
	Scheduling Custom SQL Filter Groups FILTER GROUPS Add Group Edit Group Delete Group						
	Filter Group Name Days From Today Including Day of Weather 0 Daily						

- 7. Highlight the Filter Group
- o 8. Click "Edit Group"

ENABLED		
RAB Weather	Folder: \\\tsifs1\Phonetree\RAB	
DISABLED	Filename: ncs_ivr_weather.bxt	
	Data Format: IVR Appt Day-Of Notification v. 1.0	*
	Scheduling Custom SQL Filter Groups	up Delete Group
	Filter Group Name Days From Today Including	
	Uay of Weather U Daily	

• For Filter Action, select " include records that have the following criteria"



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- For Column select "appt\_time\_filter"
- For Filter Type chose the appropriate value (i.e. >, <, >=, <=)
- o 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"

Configuration: E	xport Filter Group							
Allows u	Ifiguration: users to define Filters used to	Export Filter o include or exclude Patients	Groupi	ng cess.				
		/ / s	ave Filter Group	Close				
FILTER GRO	UP DETAILS							
Group Name:	Day of Weather		Re	turn Data:	0	days from today		_
Schedule:	Daily		▼ Pra	ctice Holiday Sche	dule:	T	(if applicable)	View Holidays
COLUMN FIL	TERS	Add Filter	Delete Filter	FILTER DE	TAILS			Save Changes
🗉 🗏 Incluc	de Only Records That M	atch Criteria (All records	if 'No Filter:	Filter Action:	Include Reco	ords that have the following c	riteria	•
No	Filters Defined (0 filters)			Column:	appt_time_fi	lter		-
🗉 📄 Then	Exclude Records That M	latch Criteria		Filter Type:	<=			•
No	Filters Defined (0 filters)			Filter Value:	1300			
🗉 📄 Repla	ice Values							

Note: To Remove a filter Once it's applied: Highlight the filter and click "delete filter"

- o 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"

T OF EXPORT DEFINITIONS		Save Export Settings Run This Export
Daily Appt Reminder	EXPORT DEFIN	TION
ENABLED	Friendly Name:	Inclement Weather
Inclement Weather ncsivr_weather_appts.txt ENABLED	Description:	
	Folder:	\\tsifs1\Phonetree\CFP\
	Filename:	ncs_ivr_weather_appts.txt
	Data Format:	IVR Appointment Reminder v. 1.2

• Follow the rest of the steps in Step C.