

APPOINTMENT CONFIRMATIONS: HOW TO LOAD APPOINTMENTS IN CLIENTTELL

UPLOAD APPOINTMENT REPORTS TO GENERATE REMINDER CALLS

1. Navigate to Allscripts → Scheduling → Scheduling Reports → Appointment Detail Report

a. Drop down the Stored Job box and select “Confirmations 2 Days Before (ClientTell)”

b. Select the Appointment Date-From and To (these should be the same date)

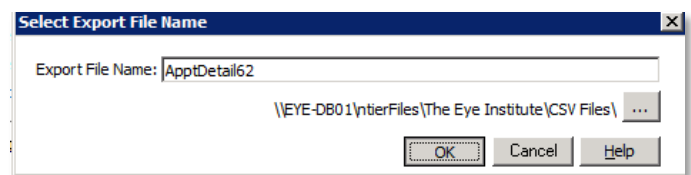
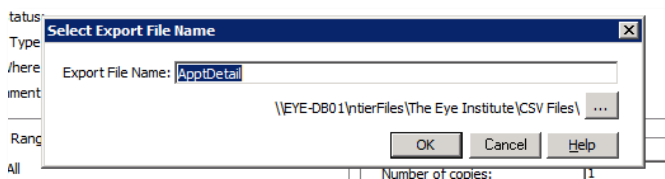
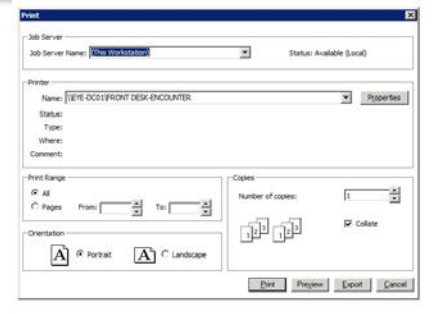
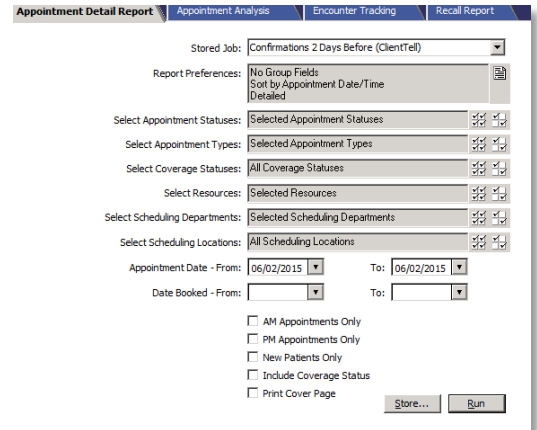
c. Select Run

d. Select Export

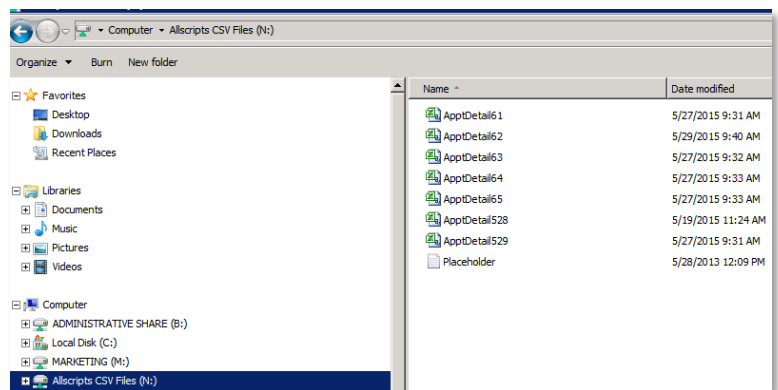
i. The Export Box will open → Enter name → Select OK

It is best to just enter the date without extra characters:

June 2, 2015 = *ApptDetail62* or July 15 = *ApptDetail715*



e. The report will save to your N Drive “Allscripts CSV Files” (Located here: *\\eye-db01\NtierFiles\The Eye Institute\CSV Files*)



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2. Navigate to www.clienttell.net
 - a. Select Client Login (top right of page)

Username: flayecon

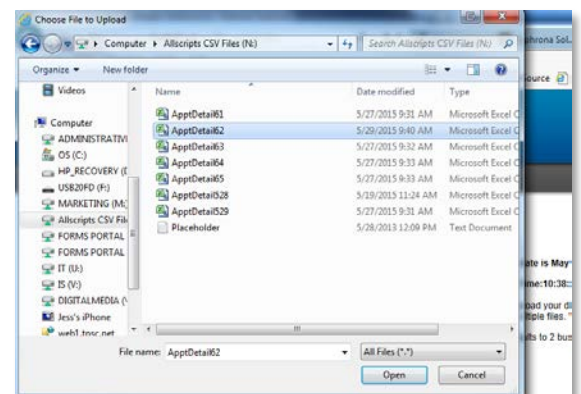
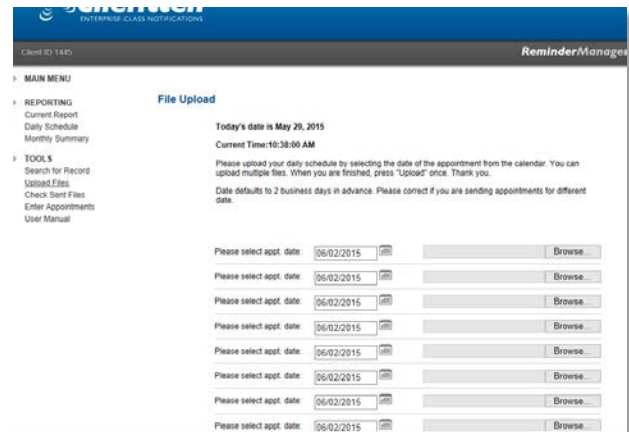
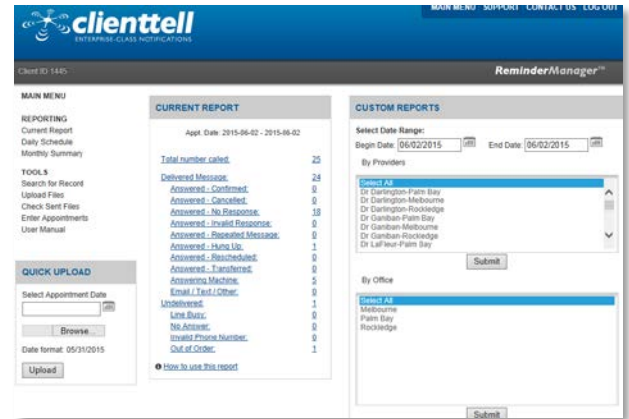
Password: appt1445

- b. Select Reminder Manager

- c. The Reminder Manager Screen opens
→ Select Upload Files

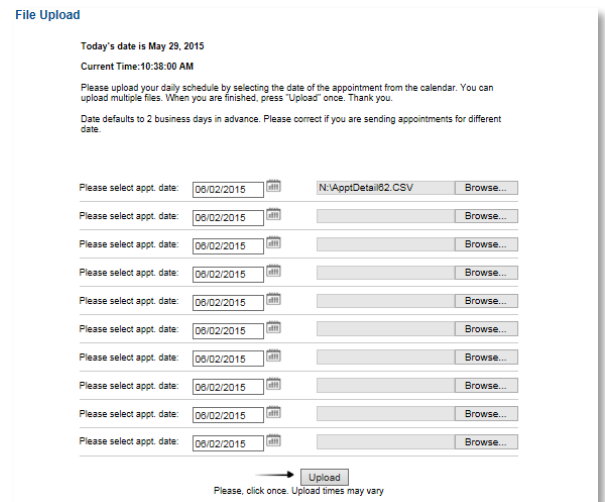
- d. The File Upload Page Opens → Select the date you wish to upload → Select Browse

- e. The File Browser will open → Navigate to your N Drive “Allscripts CSV File” → Select the file you wish to upload → Select Open

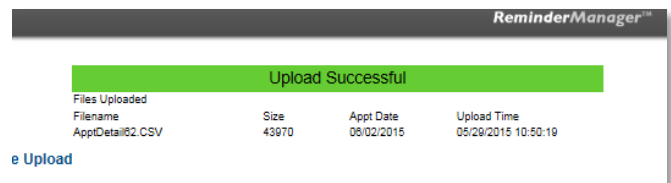


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f. Your file will be loaded → Select Upload



g. You will see **Upload Successful** for all the files you uploaded.



CHECK CANCELLED APPOINTMENTS

1. Navigate to the Appointment Reminder Screen

2. CUSTOM REPORTS → Select the Date Range you wish to pull cancelled appointments for → Submit

3. CURRENT REPORT → Displays based on the dates you select in CUSTOM REPORTS

4. Answered – Cancelled → Will display number of cancelled appointments → Select to open a detailed list

3. Cancel in Allscripts

