### APPOINTMENT CONFIRMATIONS: How TO LOAD APPOINTMENTS IN CLIENTTELL

#### **UPLOAD APPOINTMENT REPORTS TO GENERATE REMINDER CALLS**

- Navigate to Allscripts → Scheduling → Scheduling Reports → <u>Appointment Detail Report</u>
  - a. Drop down the Stored Job box and select
     "Confirmations 2 Days Before (ClientTell)"
  - b. Select the <u>Appointment Date-From</u> and <u>To</u> (these should be the same date)
  - c. Select Run

nt Detail Report Appointment Ar	nalysis Encounter Tracking Recall Report	
		-
Stored Job:	Confirmations 2 Days Before (ClientTell)	1
Report Preferences:	No Group Fields Sort by Appointment Date/Time Detailed	<sup>2</sup> m
Select Appointment Statuses:	Selected Appointment Statuses	¥
Select Appointment Types:	Selected Appointment Types	¥
Select Coverage Statuses:	All Coverage Statuses	ł
Select Resources:	Selected Resources	7
Select Scheduling Departments:	Selected Scheduling Departments	ł
Select Scheduling Locations:	All Scheduling Locations 것같 설.	4
Appointment Date - From:	06/02/2015 To: 06/02/2015 T	
Date Booked - From:	• To: •	
	AM Appointments Only	
	PM Appointments Only	
	New Patients Only	
	Include Coverage Status	
	Print Cover Page Store	]
wat	X	
Job Server Name: This Workstation)	Status: Available (Local)	
Printer		
Name: WEYE-DC01/FRONT DESK-ENCOUNTER Status:	Ptoperties	

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- 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

tatus Select Export File Name	Select Export File Name
/here Export File Name: AppiDetail	Export File Name: ApptDetail62
\\EYE-DB01\ntierFiles\The Eye Institute\CSV Files\	\EYE-DB01\ntierFiles\The Eye Institute\CSV Files\
Rang         OK         Cancel         Help           All         Number of copies:         11	Cancel Help

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

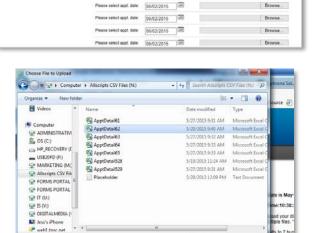
Organize 🔻 Burn New folder		1
🗆 🚖 Favorites	Name ^	Date modified
E Desktop	ApptDetail61	5/27/2015 9:31 A
Downloads	ApptDetail62	5/29/2015 9:40 A
🔄 Recent Places	ApptDetail63	5/27/2015 9:32 A
	ApptDetail64	5/27/2015 9:33 A
Cipation Contraction Contracti	ApptDetail65	5/27/2015 9:33 A
	ApptDetail528	5/19/2015 11:24
initial	ApptDetail529	5/27/2015 9:31 A
	Placeholder	5/28/2013 12:09
🛛 📜 Computer		
E 💬 ADMINISTRATIVE SHARE (B:)		
🗉 🚋 Local Disk (C:)		
Allscripts CSV Files (N:)		

# APPOINTMENT CONFIRMATIONS: How TO LOAD APPOINTMENTS IN CLIENTTELL

- 2. Navigate to <u>www.clienttell.net</u>
  - a. Select Client Login (top right of page)
     Username: flaeyecon
     Password: appt1445
  - b. Select Reminder Manager
  - c. The Reminder Manager Screen opens →Select <u>Upload Files</u>

d. The File Upload Page Opens  $\rightarrow$  Select the date you wish to upload  $\rightarrow$  Select Browse

e. The File Browser will open → Navigate to your N Drive "Allscripts CSV File" → Select the file you wish to upload → Select <u>Open</u>



All Files (".")

Open Cancel

File name: ApptDetail62

06/02/2015



clienttell

AUN MENU	CURRENT REPORT	CUSTOM REPORTS
REPORTING Current Report Daily Schedule Monthly Summary	Appt. Date: 2015-06-02 - 2015-06-02 Total number called. 2	Select Date Range: Begin Date: [06/02/2015] (FB) End Date: [06/02/2015] (FB)
COOLS	Detends Messaer         2           Answert Contents         0           Answert Contentanswert         0           An	Errors (z. Landgouer-Parte Bay De Califorgioue-Parte Bay De Califorgioue-Parte Bay De Califordioue De Califordioue De Califordioue De Califordioue En La france/Part Bay Rey Office Entry Office Parts Bay Recontige
		Sutmit
ENTERPRESE O	LASS NOTFICATIONS	
Cheret RD 1445	LASS NOTFICATIONS	ReminderMa
Aud ID 1455 MAIN MENU REPORTING Current Report Daily Schedule	File Upload Today's date is May 29, 201	
Sect ID 1845 MAIN MENU REPORTING Current Report Daily Schedule Monthly Summary TOOLS	File Upload Todays data is May 20, 20 Carrent Time:10:36:00 AM Passes upload your data; sch	s Add by sending the date of the apportment from the calendar. You can
Audi 20 1115 MAJN MENU REPORTING Current Report Daily Schedule Monthly Summary TOOL S Search for Record Useda Effici Check Sent Files Check Sent Files	File Upload Today's date is May 29, 20 Current Time-10-30:00 AM Presse upload your date. When	
Aud 10 1145 MAIN MENU REPORTING Current Report Daily Schedule Monthly Summary TOOLS Search for Record Usalad Elias Check Seort Files Check Seort Files	File Upload Todays dans is May 29, 20 Current Timo:10:30:00 AM Please upload multiple file. When y upload multiple file. When y Date defaults to 2 business of date.	a due to selecting the dubit of the apportment than the calendar. You can use timethed, press "Update" frank, Thank you.
	File Upload Todays date is May 28, 20 Current Timo:10:3600 AM Pieses splaad yout day kerk Date statuts to 2 builhead date. Pieses select appt, date	a Dat by seeding the data of the apportiment than the calendar. You can une trained, ness "Upped" crine. Thank you. up is a devance. Please constit if you are sending appointments for different

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Browse

#### APPOINTMENT CONFIRMATIONS: How TO LOAD APPOINTMENTS IN CLIENTTELL

f. Your file will be loaded  $\rightarrow$  Select Upload

Please upload your daily s upload multiple files. Whe	schedule by selec n you are finishec	ting the date d, press "Upl	e of the appointment from the cale load" once. Thank you.	ndar. You can
Date defaults to 2 busines date.	is days in advanc	e. Please co	rrect if you are sending appointme	ents for different
		-		
Please select appt. date:	06/02/2015	1111	N:\ApptDetail62.CSV	Browse
Please select appt. date:	06/02/2015			Browse
Please select appt. date:	06/02/2015	111		Browse
Please select appt. date:	06/02/2015	1111		Browse
Please select appt. date:	06/02/2015	111		Browse
Please select appt. date:	06/02/2015	111		Browse
Please select appt. date:	06/02/2015	1111		Browse
Please select appt. date:	06/02/2015	1111		Browse
Please select appt. date:	06/02/2015	111		Browse
Please select appt. date:	06/02/2015	111		Browse

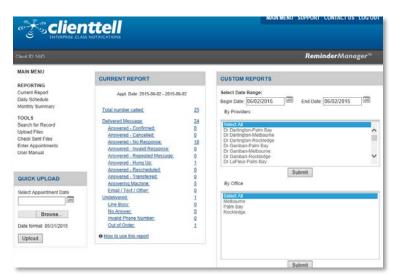
File Unload

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

			ReminderMa
	Upload	Successful	
Files Uploaded			
Filename	Size	Appt Date	Upload Time
ApptDetail62.CSV	43970	08/02/2015	05/29/2015 10:50:19

# **CHECK CANCELLED APPOINTMENTS**

- 1. Navigate to the Appointment Reminder Screen
- <u>CUSTOM REPORTS</u>→Select the <u>Date</u>
   <u>Range</u> you wish to pull cancelled appointments for→Submit
- <u>CURRENT REPORT</u>→Displays based on the dates you select in CUSTOM REPORTS



- Answered Cancelled → Will display number of cancelled appointments → Select to open a detailed list
- 3. Cancel in Allscripts