clienttell
ENTERPRISE-CLASS NOTIFICATIONS

Appointment Reminder Service

ReminderManager™

Quick Reference Guide

ClientTell is pleased to introduce its innovative online reporting system. With this new interface your practice can log on to our secure website from any computer, 24-hours a day. You can view the results of your patient calls online, without having to download reports to your computer. You can view historical reports, as well as doctors' daily schedules with the results of your contact campaigns. In addition, you have the option to upload your scheduling files directly from a web browser.

Data Security Information

ClientTell uses Secure Socket Layer (SSL) protocol with an encryption key length of 128-bits to encrypt your personal and patient information. Any information provided to you is encoded and decoded once it reaches your browser.
An icon, such as a lock or key, will be displayed in the corner of your browser's window to let you know that your browser's encryption is active.

You can also ensure the security of your information by following these steps:

- Never reveal your Login Name and Password to anyone who is not responsible for scheduling.
- Always log off before leaving your computer.
- Always log off of this site before accessing other Internet sites.

How to use the system

1) Start your Internet Browser (Internet Explorer, Netscape, Mozilla etc.)

2) Type **ClientTell.net**. Click on the Client Login button in the top right corner of the screen.

OR

Type in the address field: https://**secure.clienttell.net** . Add the address to your favorites.

3) You will see the following window:

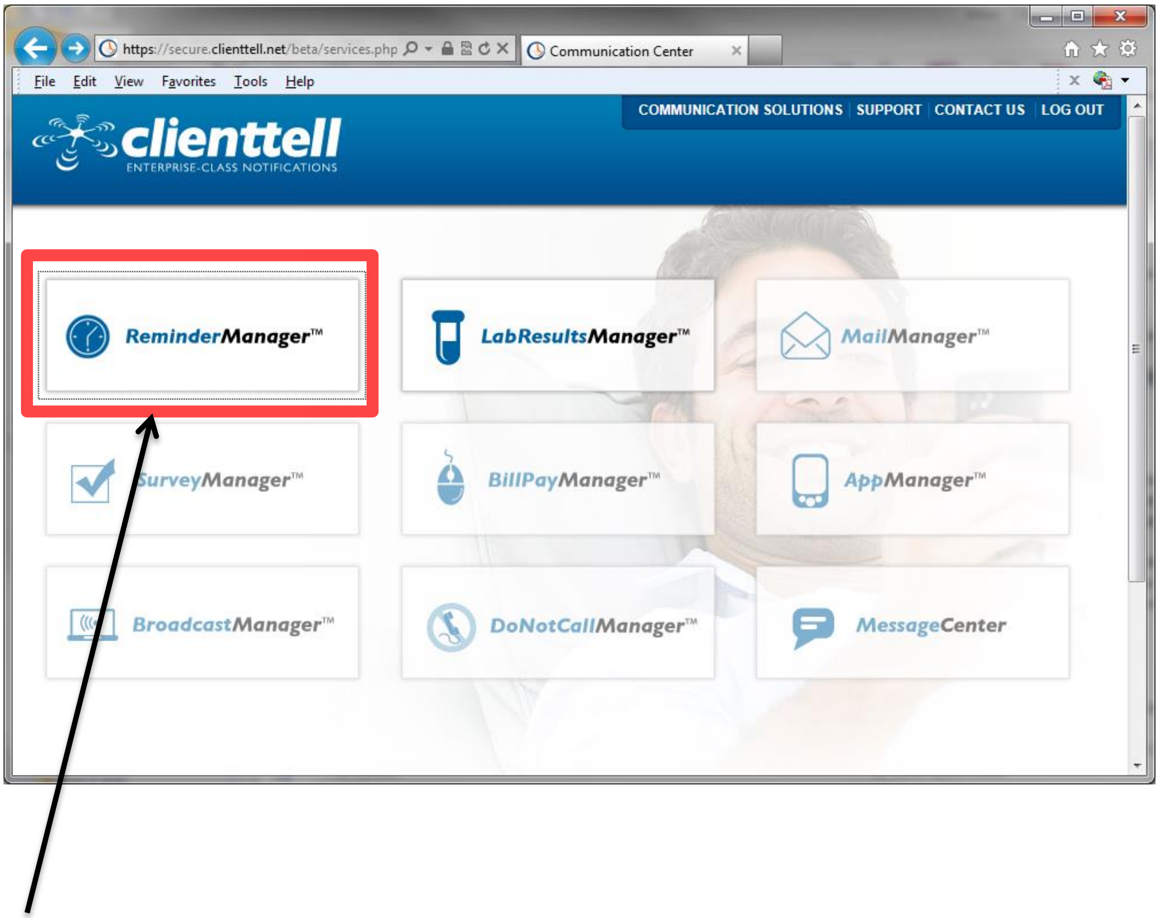
Type in your user name and password in the space provided on the left:

Username: ______________

Password: ______________

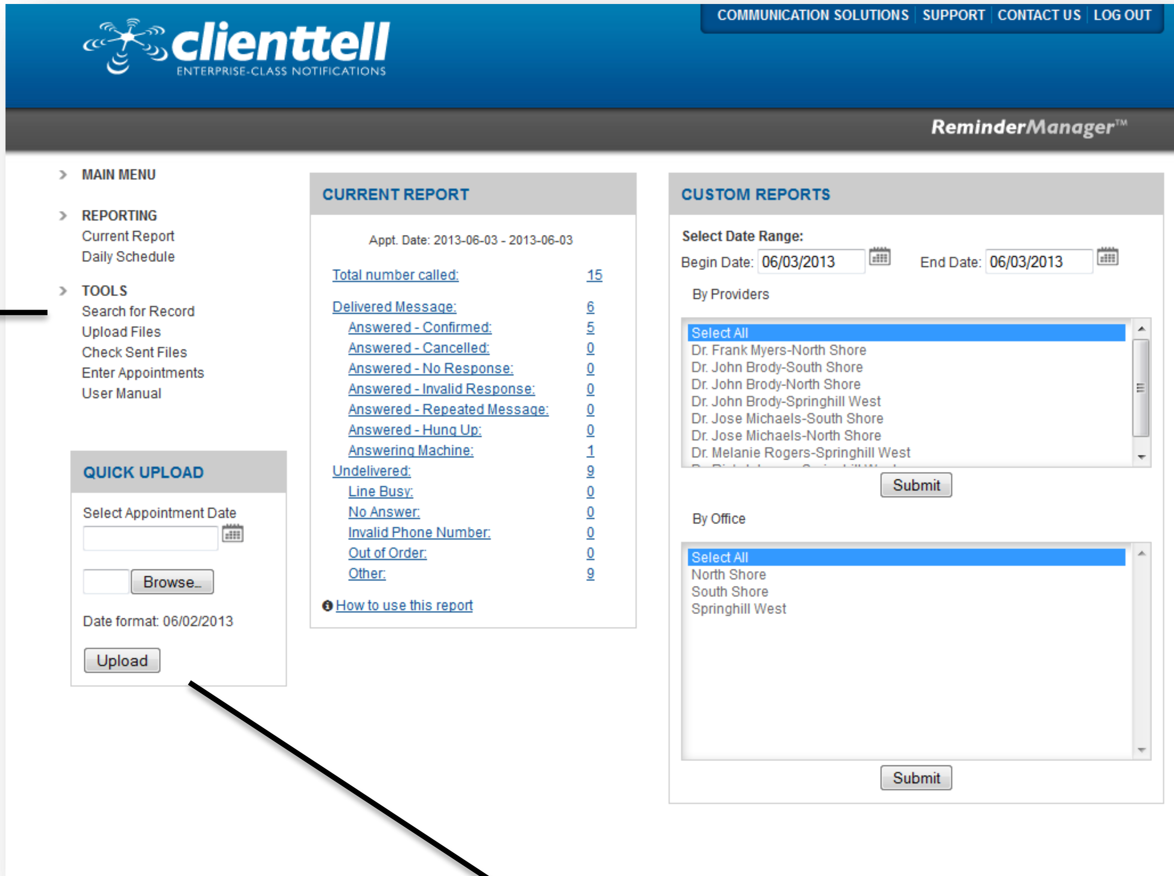
Click on the “Secure Login” button

Upon entering the portal, your new landing page will reflect the products and options available to your organization.



Click on the ReminderManager selection box to enter.

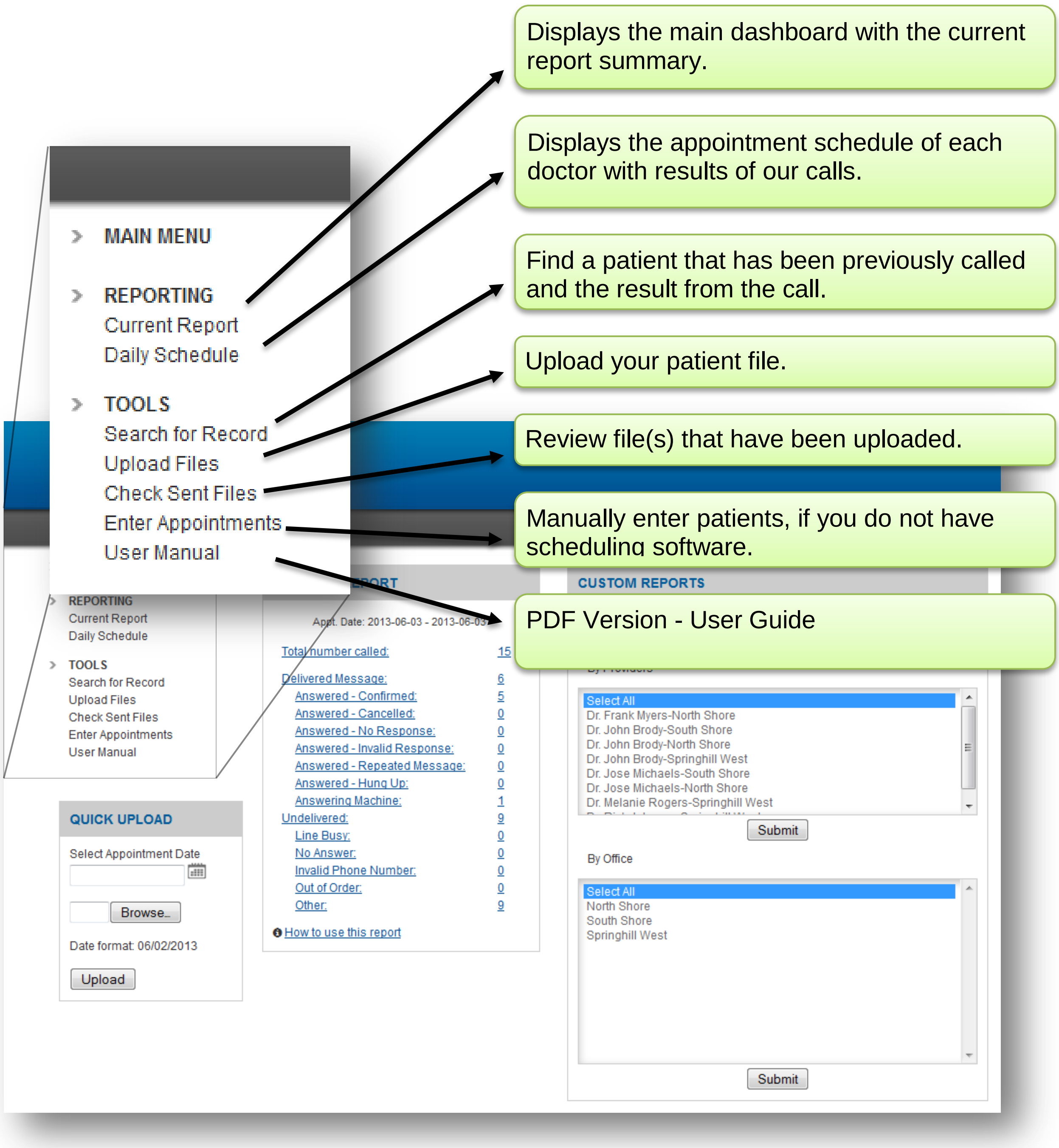
You will enter the main control panel:



Quick Upload:
Upload your patient file using the quick dialog box.

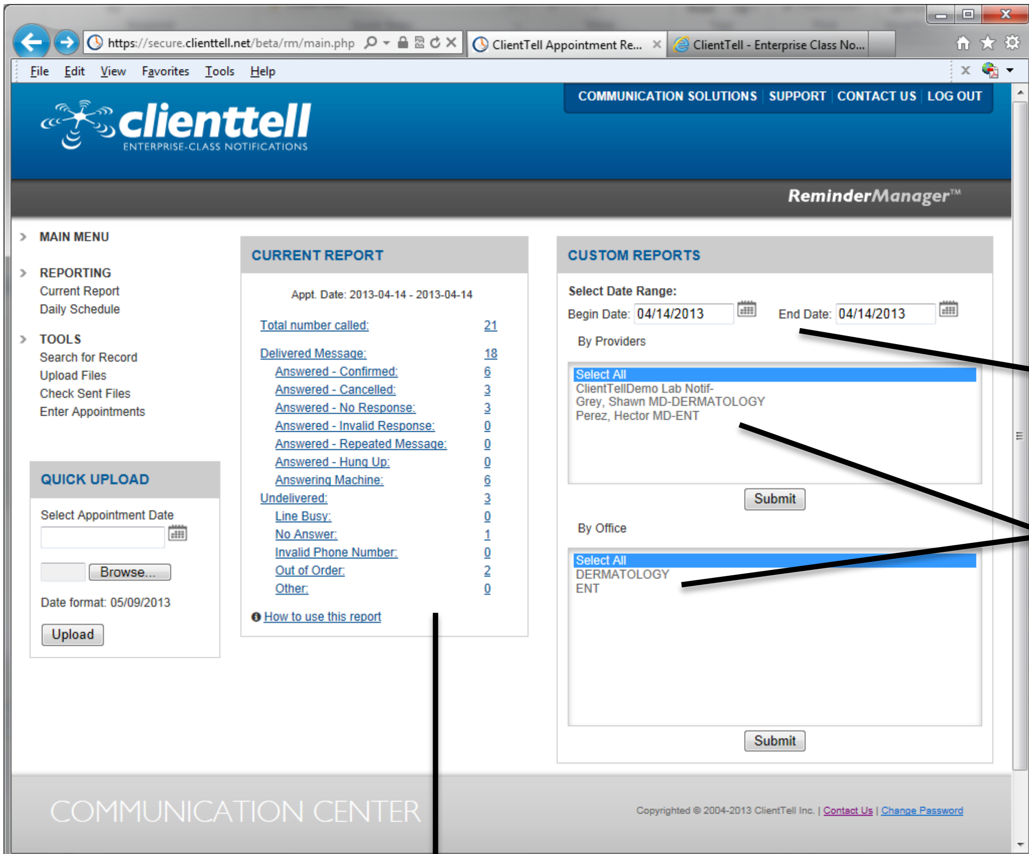
Search for record lets you find a patient that has been previously contacted.

On the left side of the screen is the following navigational menu:



The following sections will explain all features of the Online Control Panel.

Current Report

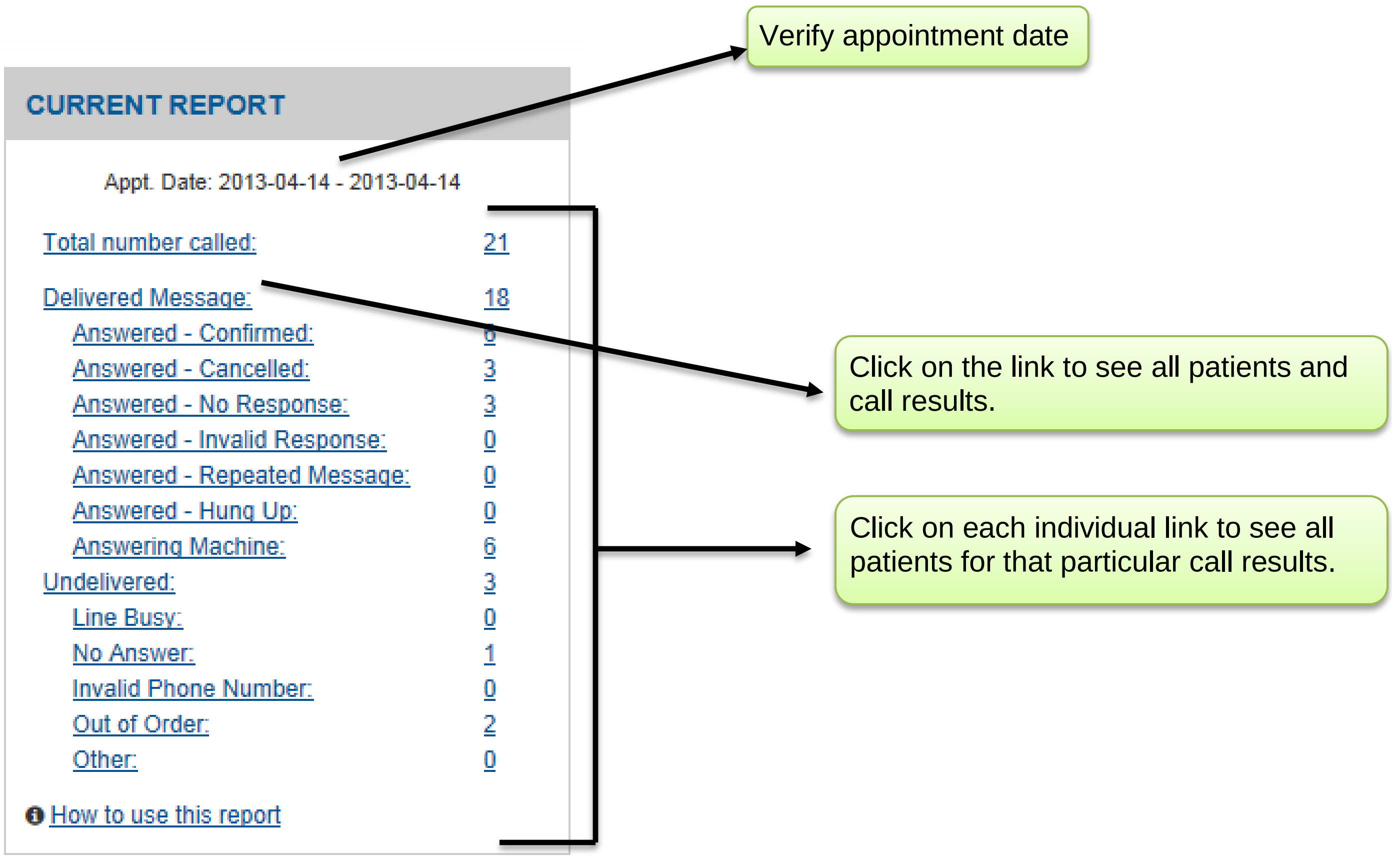


You can modify the report to view a past date or date ranges.

Drill down options for provider or office are also available.

The control panel will display the current report of your most recent calls. You can click on each category to determine what took place on each individual call.

The current report shows the results of your calls from the latest calling session. The appointment date is displayed at the top of the report. Call results are divided into categories. To look at the calls from each category, simply click on the link. To look at all results from the calling session, click on "Total number of patients called".



Following is an explanation of the sections found in the report.

Delivered Message (Billable) - Displays all calls where either someone answers the phone or the message is delivered to an answering machine.

> **Answered - Confirmed** - Patient answers the phone and confirms the appointment.
>
> **Answered - Cancelled** - Patient answers the phone and cancels the appointment.
>
> **Answered - No Response** - Phone is answered and the entire message is heard, but the individual chooses not to respond by pressing 1 to confirm, 2 to repeat, or 5 to cancel on their touch tone phone. Usually occurs when a family member answers the phone and is not sure whether to confirm or cancel.

Answered - Invalid Response - Patient answers the phone and during the response options presses a number other than 1,2, or 5.

Answered - Repeated Message - Patient answers the phone and presses 2 to repeat. After the message is repeated patient hangs up without confirming or canceling.

Answered - Hung Up - Patient answers the phone but doesn't listen to the entire message and never reaches the response options.

Answering Machine - An answering machine picks up the phone. For your benefit, our system leaves the message twice in case of an interruption. No response options are given.

Undelivered (Non - Billable) - Displays all calls that are not answered.

Line Busy – We receive a busy signal. We will try to call up to 10 times a day. If your practice is calling two days in advance then we will call up to twenty times.

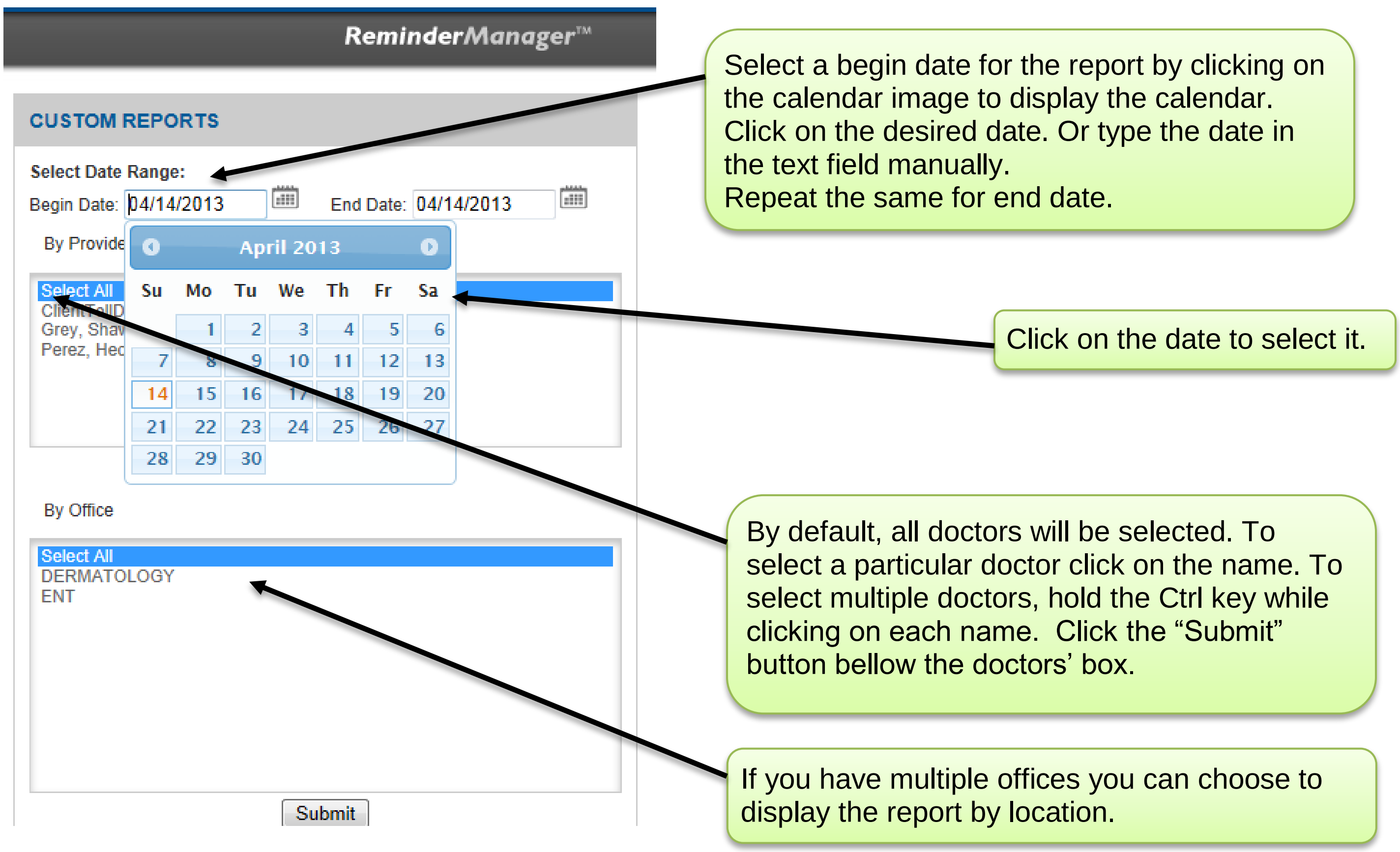
No Answer - No one answers the phone and the patient does not have an answering machine. We will try to call up to 10 times a day. If your practice is calling two days in advance then we will call up to twenty times.

Invalid Phone No. - Patient could not be reached, because the phone number was invalid. Usually happens when the number is lacking digits.

Out of Order - Patient could not be reached because the phone or phone number was out of order.

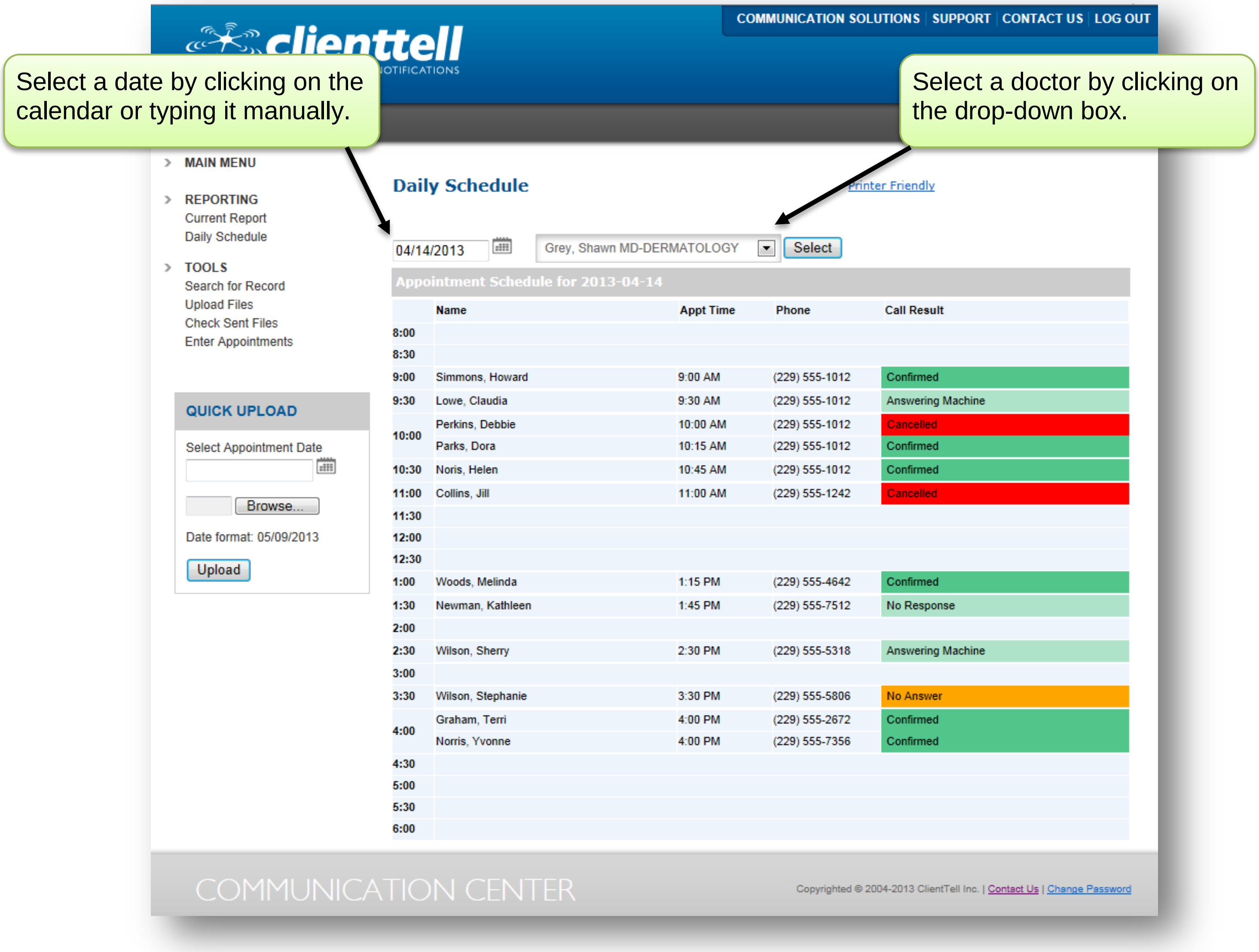
Custom Reports

The Custom Reports section allows you to view past reports of your patient calls.



After you make your selection, click Submit to display the report.

Daily Schedule



Daily Schedule displays each doctor's daily appointments and the results of calling their patients.

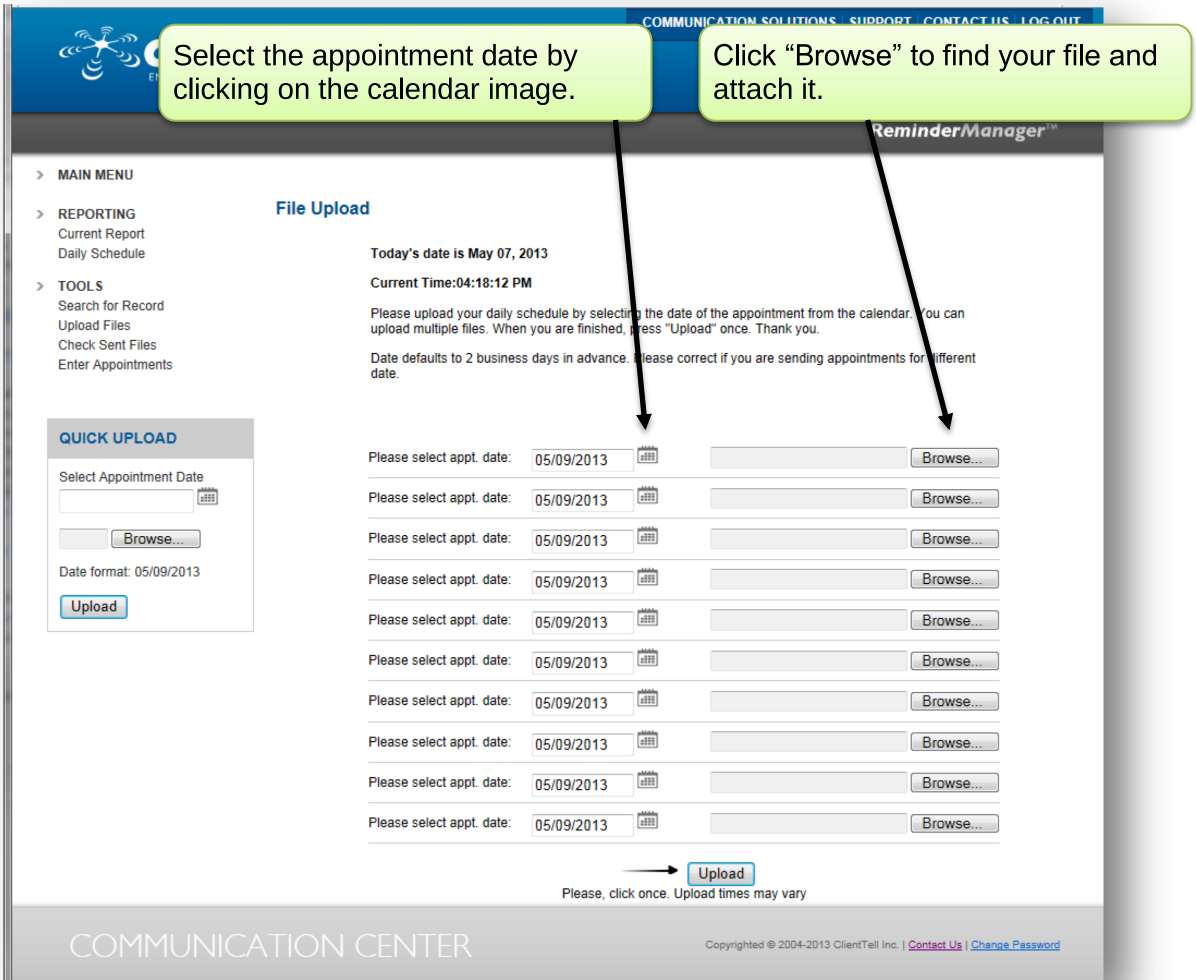
Answered calls are highlighted in green. Confirmed appointments are in dark green, and cancelled appointments are in red.

All unanswered calls are highlighted in orange.

This schedule can be used for a variety of functions. You can easily see which patients need recalls. In addition, you can print this schedule and when your patients arrive for their appointments, you can update the invalid and out of order phone numbers.

Upload File

This feature lets you upload your patient file through a secure connection.



It is very important that you select the correct appointment date for which you are sending your file. By default the date that is displayed is 2 days in advance from the current date.

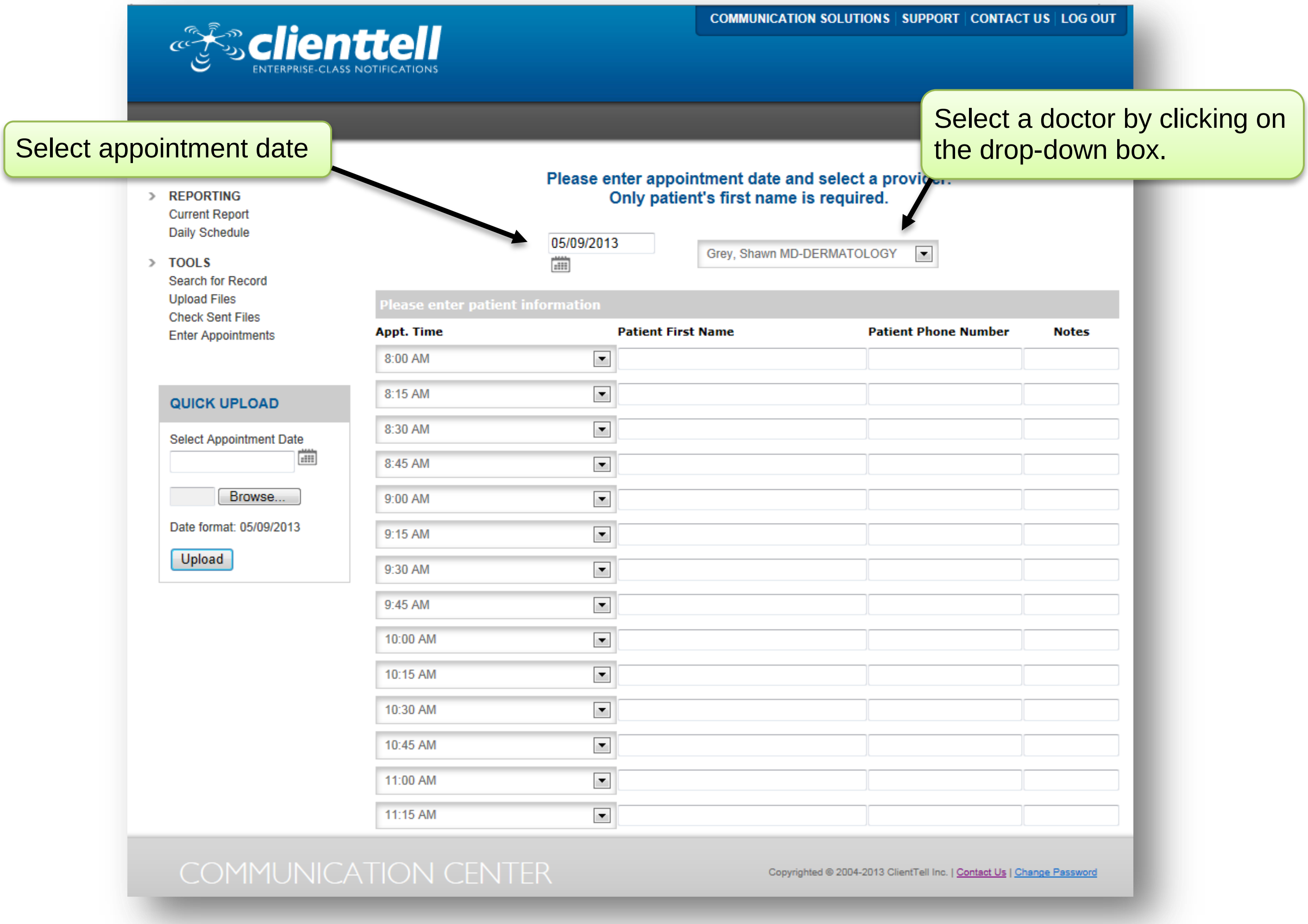
You can attach up to 10 files at one time. When you are finished, click 

A confirmation will be displayed at the top of the screen, notifying you that we have received your file. If you don't see the confirmation, try to upload it again or contact us.

Enter Patients

This option applies to practices which do not have scheduling software.

You can manually enter your patients' first names and phone numbers and upload your file.



Step1. Enter the correct appointment date.

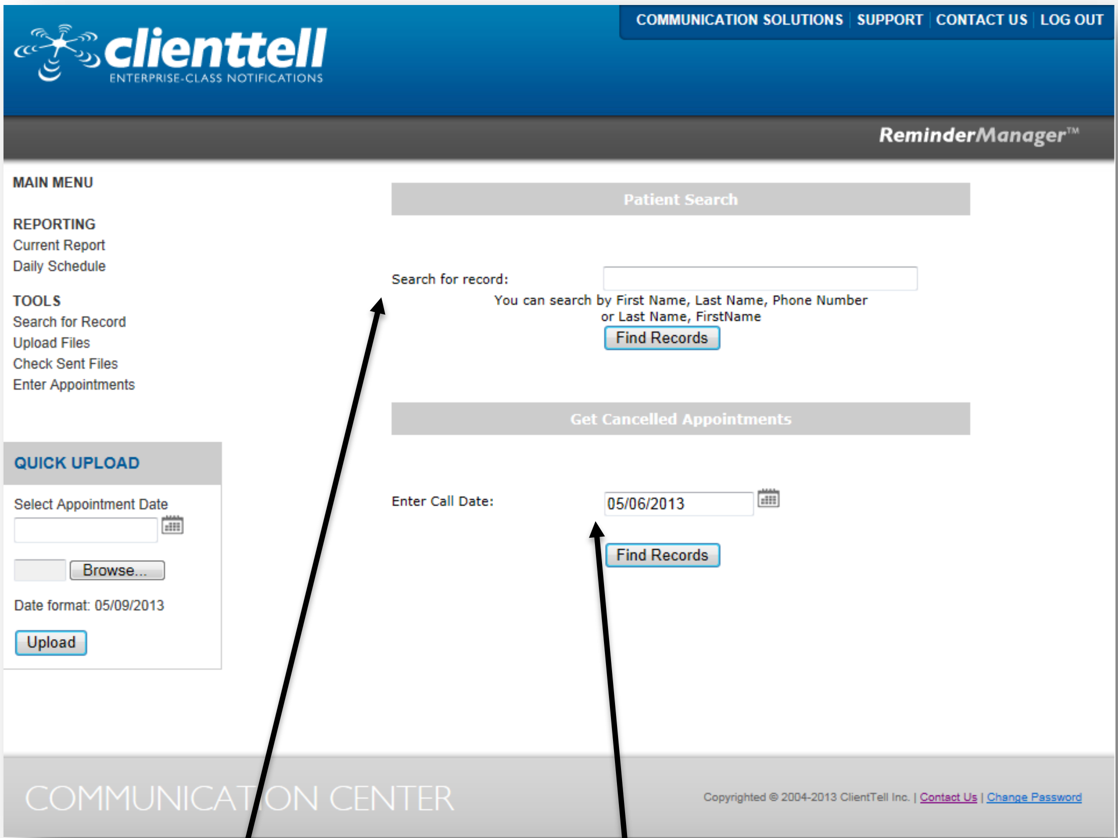
Step2. Select the doctor's whose patients you are entering.

Step3. We only need patient's first name and phone number to make your calls. If you want to use different scripts, for example for first time patients, you need to specify that in the notes field. Contact us for more information about this option.

Step4. Click 

at the bottom of the page.

Search for Patient or Cancelled Appointments



Patient Search:
Search for a particular record by patient name or phone number. Usually it is used to quickly access and verify the result of a call for a particular patient.

Cancelled Appointment Search:
To locate the recipients that have chosen to cancel their appointment, enter the date of the calling session and click “Find Records” to view the report.

Customer Service Contact Information

Client Login

https://secure.clienttell.net
Username:
Password:

Contact Information

Phone:	1-877-244-9178
Fax:	1-229-244-9192
Email:	support@clienttell.net
Website:	www.ClientTell.net

Thank you for being a part of the ClientTell family.

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