



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  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:

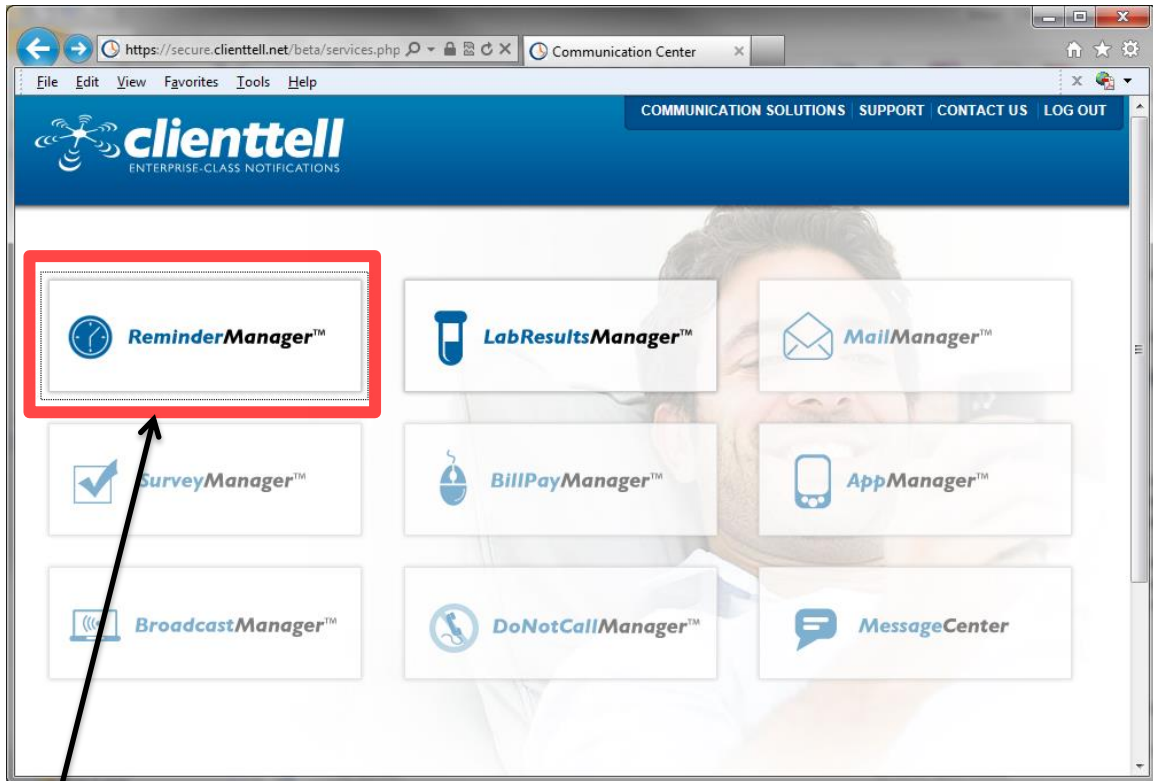
Username: _____

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:

The screenshot displays the clienttell ReminderManager™ interface. At the top, there is a blue header with the clienttell logo and navigation links: COMMUNICATION SOLUTIONS, SUPPORT, CONTACT US, and LOG OUT. Below the header is a dark grey bar with the text ReminderManager™. The main content area is divided into several sections:

- MAIN MENU:** Includes links for REPORTING (Current Report, Daily Schedule) and TOOLS (Search for Record, Upload Files, Check Sent Files, Enter Appointments, User Manual).
- QUICK UPLOAD:** A section for uploading patient files, featuring a date selection field, a 'Browse...' button, a date format indicator (06/02/2013), and an 'Upload' button.
- CURRENT REPORT:** A table showing call statistics for the period 2013-06-03 to 2013-06-03. The total number of calls is 15. The table lists various call outcomes and their counts.
- CUSTOM REPORTS:** A section for generating custom reports, including date range selection (Begin Date: 06/03/2013, End Date: 06/03/2013) and filters for providers and offices.

Two callout boxes provide additional information:

- Search for record lets you find a patient that has been previously contacted.** (Points to the 'Search for Record' tool)
- Quick Upload: Upload your patient file using the quick dialog box.** (Points to the 'Upload' button in the Quick Upload section)

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

The screenshot shows the Online Control Panel interface. On the left is a navigational menu with the following items:

- MAIN MENU
- REPORTING
 - Current Report
 - Daily Schedule
- TOOLS
 - Search for Record
 - Upload Files
 - Check Sent Files
 - Enter Appointments
 - User Manual

Callouts on the right explain the functions of these items:

- Current Report: Displays the main dashboard with the current report summary.
- Daily Schedule: Displays the appointment schedule of each doctor with results of our calls.
- Search for Record: Find a patient that has been previously called and the result from the call.
- Upload Files: Upload your patient file.
- Check Sent Files: Review file(s) that have been uploaded.
- Enter Appointments: Manually enter patients, if you do not have scheduling software.
- User Manual: PDF Version - User Guide

The main content area shows a 'REPORT' for the period '2013-06-03 - 2013-06-05'. It includes a 'QUICK UPLOAD' section with a date selector and an 'Upload' button. Below this is a table of call statistics:

Category	Count
Total number called:	15
Delivered Message:	6
Answered - Confirmed:	5
Answered - Cancelled:	0
Answered - No Response:	0
Answered - Invalid Response:	0
Answered - Repeated Message:	0
Answered - Hung Up:	0
Answering Machine:	1
Undelivered:	9
Line Busy:	0
No Answer:	0
Invalid Phone Number:	0
Out of Order:	0
Other:	9

Below the table is a 'CUSTOM REPORTS' section with two dropdown menus for selecting records by 'By Name' and 'By Office', each with a 'Submit' button.

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

Current Report

The screenshot shows the ClientTell ReminderManager interface. The main navigation menu includes: MAIN MENU, REPORTING (Current Report, Daily Schedule), and TOOLS (Search for Record, Upload Files, Check Sent Files, Enter Appointments). A 'QUICK UPLOAD' section allows selecting an appointment date and uploading a file. The 'CURRENT REPORT' section displays data for the date range 2013-04-14 to 2013-04-14:

Category	Count
Total number called:	21
Delivered Message:	18
Answered - Confirmed:	6
Answered - Cancelled:	3
Answered - No Response:	3
Answered - Invalid Response:	0
Answered - Repeated Message:	0
Answered - Hung Up:	0
Answering Machine:	6
Undelivered:	3
Line Busy:	0
No Answer:	1
Invalid Phone Number:	0
Out of Order:	2
Other:	0

The 'CUSTOM REPORTS' section includes a 'Select Date Range' (Begin Date: 04/14/2013, End Date: 04/14/2013) and a 'By Providers' dropdown menu with options: Select All, ClientTellDemo Lab Notif-Grey, Shawn MD-DERMATOLOGY, and Perez, Hector MD-ENT. A 'By Office' dropdown menu has options: Select All, DERMATOLOGY, and ENT. Both dropdown menus have 'Submit' buttons.

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".

CURRENT REPORT

Appt. Date: 2013-04-14 - 2013-04-14

Total number called:	21
Delivered Message:	18
Answered - Confirmed:	8
Answered - Cancelled:	3
Answered - No Response:	3
Answered - Invalid Response:	0
Answered - Repeated Message:	0
Answered - Hung Up:	0
Answering Machine:	6
Undelivered:	3
Line Busy:	0
No Answer:	1
Invalid Phone Number:	0
Out of Order:	2
Other:	0

[How to use this report](#)

Verify appointment date

Click on the link to see all patients and call results.

Click on each individual link to see all patients for that particular call results.

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.

ReminderManager™

CUSTOM REPORTS

Select Date Range:

Begin Date: 04/14/2013 End Date: 04/14/2013

By Provider

April 2013

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

By Office

Select All
DERMATOLOGY
ENT

Submit

Select a begin date for the report by clicking on the calendar image to display the calendar. Click on the desired date. Or type the date in the text field manually. Repeat the same for end date.

Click on the date to select it.

By default, all doctors will be selected. To select a particular doctor click on the name. To select multiple doctors, hold the Ctrl key while clicking on each name. Click the "Submit" button below the doctors' box.

If you have multiple offices you can choose to display the report by location.

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

Daily Schedule

The screenshot shows the ClientTell web interface for the 'Daily Schedule' page. At the top, there is a navigation bar with 'clienttell NOTIFICATIONS' and links for 'COMMUNICATION SOLUTIONS', 'SUPPORT', 'CONTACT US', and 'LOG OUT'. A left sidebar contains a 'MAIN MENU' with sections for 'REPORTING' (Current Report, Daily Schedule) and 'TOOLS' (Search for Record, Upload Files, Check Sent Files, Enter Appointments). Below the sidebar is a 'QUICK UPLOAD' section with a date selector, a 'Browse...' button, and an 'Upload' button. The main content area is titled 'Daily Schedule' and includes a 'Printer Friendly' link. It features a date selector set to '04/14/2013' and a doctor dropdown menu set to 'Grey, Shawn MD-DERMATOLOGY'. Below these is a table titled 'Appointment Schedule for 2013-04-14' with columns for 'Name', 'Appt Time', 'Phone', and 'Call Result'. The table lists appointments from 8:00 AM to 6:00 PM. Call results are color-coded: green for 'Confirmed', red for 'Cancelled', orange for 'No Answer', and light green for 'Answering Machine' or 'No Response'. Two callout boxes with arrows point to the date and doctor dropdown menus, providing instructions on how to select them.

Select a date by clicking on the calendar or typing it manually.

Select a doctor by clicking on the drop-down box.

Name	Appt Time	Phone	Call Result
	8:00		
	8:30		
Simmons, Howard	9:00 AM	(229) 555-1012	Confirmed
Lowe, Claudia	9:30 AM	(229) 555-1012	Answering Machine
Perkins, Debbie	10:00 AM	(229) 555-1012	Cancelled
Parks, Dora	10:15 AM	(229) 555-1012	Confirmed
Noris, Helen	10:45 AM	(229) 555-1012	Confirmed
Collins, Jill	11:00 AM	(229) 555-1242	Cancelled
	11:30		
	12:00		
	12:30		
Woods, Melinda	1:15 PM	(229) 555-4642	Confirmed
Newman, Kathleen	1:45 PM	(229) 555-7512	No Response
	2:00		
Wilson, Sherry	2:30 PM	(229) 555-5318	Answering Machine
	3:00		
Wilson, Stephanie	3:30 PM	(229) 555-5806	No Answer
Graham, Terri	4:00 PM	(229) 555-2672	Confirmed
Norris, Yvonne	4:00 PM	(229) 555-7356	Confirmed
	4:30		
	5:00		
	5:30		
	6:00		

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.

The screenshot shows the 'File Upload' page in the ReminderManager system. The page includes a navigation menu on the left with sections for 'MAIN MENU', 'REPORTING', and 'TOOLS'. The main content area displays the current date and time, followed by instructions for uploading files. A 'QUICK UPLOAD' sidebar on the left contains a 'Select Appointment Date' field with a calendar icon and a 'Browse...' button. The main area features ten rows, each with a 'Please select appt. date:' label, a date field (05/09/2013), a calendar icon, and a 'Browse...' button. At the bottom, there is an 'Upload' button and a note: 'Please, click once. Upload times may vary'. Two callout boxes with arrows point to the calendar icons and the 'Browse...' buttons. The top navigation bar includes links for 'COMMUNICATION SOLUTIONS', 'SUPPORT', 'CONTACT US', and 'LOG OUT'. The footer contains 'COMMUNICATION CENTER' and copyright information.

Select the appointment date by clicking on the calendar image.

Click "Browse" to find your file and attach it.

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.

COMMUNICATION SOLUTIONS | SUPPORT | CONTACT US | LOG OUT

clienttell
ENTERPRISE-CLASS NOTIFICATIONS

Select appointment date

Select a doctor by clicking on the drop-down box.

Please enter appointment date and select a provider.
Only patient's first name is required.

05/09/2013

Grey, Shawn MD-DERMATOLOGY

QUICK UPLOAD

Select Appointment Date

Browse...

Date format: 05/09/2013

Upload

Please enter patient information

Appt. Time	Patient First Name	Patient Phone Number	Notes
8:00 AM			
8:15 AM			
8:30 AM			
8:45 AM			
9:00 AM			
9:15 AM			
9:30 AM			
9:45 AM			
10:00 AM			
10:15 AM			
10:30 AM			
10:45 AM			
11:00 AM			
11:15 AM			

COMMUNICATION CENTER

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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

The screenshot displays the ClientTell ReminderManager interface. At the top, there is a blue header with the ClientTell logo and navigation links: COMMUNICATION SOLUTIONS, SUPPORT, CONTACT US, and LOG OUT. Below the header, the page is titled "ReminderManager™".

The main content area is divided into two sections:

- Patient Search:** This section includes a search box labeled "Search for record:". Below the box, it states "You can search by First Name, Last Name, Phone Number or Last Name, FirstName". A "Find Records" button is located below the search box.
- Get Cancelled Appointments:** This section includes a date input field labeled "Enter Call Date:" with the value "05/06/2013" and a calendar icon. A "Find Records" button is located below the date field.

On the left side of the interface, there is a "MAIN MENU" with the following items:

- REPORTING
 - Current Report
 - Daily Schedule
- TOOLS
 - Search for Record
 - Upload Files
 - Check Sent Files
 - Enter Appointments

Below the main menu is a "QUICK UPLOAD" section with a "Select Appointment Date" field, a "Browse..." button, a "Date format: 05/09/2013" label, and an "Upload" button.

At the bottom of the page, there is a "COMMUNICATION CENTER" footer and a copyright notice: "Copyrighted © 2004-2013 ClientTell Inc. | [Contact Us](#) | [Change Password](#)".

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.

