

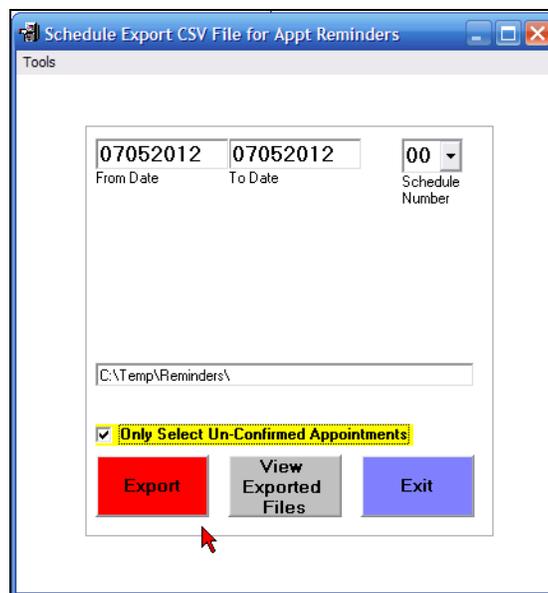
Electronic Appointment & Recall Reminders

If you have the Internet in your office, you can send email reminders directly from PowerSoftMD. In addition, you can send **voice**, **text**, and/or **email** appointment reminders via the ReRemind service at www.reremind.com

PowerSoftMD generates a standard format text CSV Export files that contains all the required appointment information for each patient. Almost all online services can use this file.

Daily Scheduled Appointments:

- 1) You may run the export program manually as follows or automatically as described in step 2. To run the Export manually start from the top of the **Schedule** screen select the top toolbar “**Tools**” option, then “**Export**”, next select “**CSV Appointment Reminder File for Common Interfaces**”.



- Set the date range to any range you want.
- Select any schedule you or use “00” all schedules.
- Eliminate patients that have been confirmed on the schedule by checking the option “**Only Select Un-Confirmed Appointments**”.
- Use the top “Tools” option to specific where the export file should be placed.
- Create the Export file by pressing the red “Export” button.
- The export file name create is: **RemindAppointments.csv**
- Once the file is created you may optionally view it by clicking on the file name.
- Upload the file to your Reminder Service.

- 2) You may also set your Windows Scheduler to run this process **automatically** any time based on your own specific requirements. You would set your windows task to Launch the following program and command line:

C:\EZWSCHED\PGMS\ReRemind.exe 00/AUTO

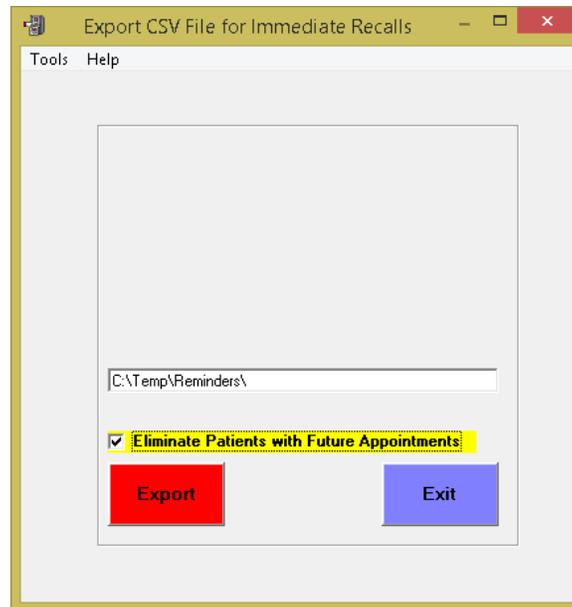
This would cause the program to create an export file containing all appointment information for the next day for all schedules. If you wanted to specify a specific Schedule change the **00** to the 2 digit number of the desired schedule. Also if you Have previously manually set the option “Only Select Un-Confirmed Appointments” then confirmed appointments will not be exported.

You could schedule this to run once every day of the week. If you have no appointments for the next day, then the export file would be contain only heading information and no appointments.

- 3) If decide to use an online service, like ReRemind at www.reremind.com, they will show you how to send the Exported file to them.

Immediate Recall Appointments:

- 1) You can mark a patient's account for "Immediate Recall" from the General screen or from the "Recall" screens. This is typically for patients that leave the office and should have scheduled an appointment, but that didn't.
- 2) You may run the export program manually as follows or automatically as described in step 3. To run the Export manually start from the top of the **Schedule** screen select the top toolbar "**Tools**" option, then "**Export**", next select "**CSV Immediate Recall file for Common Interfaces**".



- Eliminate patients that already have future appointments by checking the option: "**Eliminate Patients with Future Appointments**".
- Use the top "Tools" option to specify where the export file should be placed.
- Create the Export file by pressing the red "Export" button.
- The name of the export file is: **RemindImmediateRecall.csv**
- Once the file is created you may click on the display file name to view it.
- Upload the file to your reminder service.

- 3) You may also set your Windows Scheduler to run this process **automatically** any time based on your own specific requirements. You would set your windows task to Launch the following program and command line:

C:\EZWSCHED\PGMS\ExportImmRecall.exe AUTO

- 4) If decide to use an online service, like ReRemind at www.reremind.com, they will show you how to send the Exported file to them.

Monthly Recall Appointments:

There are lots of recall options in PowerSoftMD. We are covering an option you can use to have a reminder service use an export file to perform the recalls for your office.

- 1) From the Reports Menu select the “**Recall Patient Report**”.
- 2) Select the criteria for the patients you want recalled.
- 3) Check the option “**Create Export File for Reminder Service**”.
- 4) You can control the export files output path by using the top toolbar “**Tools**” option.
- 5) Check the sub-options of what service your Reminder Service is going to do for you. Check one or all of the sub-options (Texting, Emailing, or Calling).
- 6) Run the Report, view and/or print the report.
- 7) Click the blue “**Exit**” button on the bottom right of the report viewing screen.
- 8) Information regarding the export file will be displayed.
- 9) You can use the “**View Export CSV File**” button to look at the file if you wish.
- 10) Upload the Export file called “**RemindMonthlyRecall.csv**” to your Reminder Service.