

Confirm-IT



User Guide

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INTRODUCTION

Overview

Confirm-IT is a multi-featured calendar based application that includes an **Appointment Scheduler** and **Customer Database Manager**. It also automatically sends **Voice, Email and Text Message appointment reminders** to customers with scheduled appointments. Customers receiving a phone call “voice reminder” may be given the **option to interact** by pressing a dial pad digit to confirm, cancel and/or reschedule their appointment. Confirm-IT’s graphical appointment calendar has selectable views that efficiently **display your staff’s scheduled appointments**. Customizable colors for each of your services allow for easy viewing. Confirm-IT’s **searchable database replaces manual appointment books and automates the process of appointment reminders**. Various **reports** include employee activity, service revenue totals and call out results.

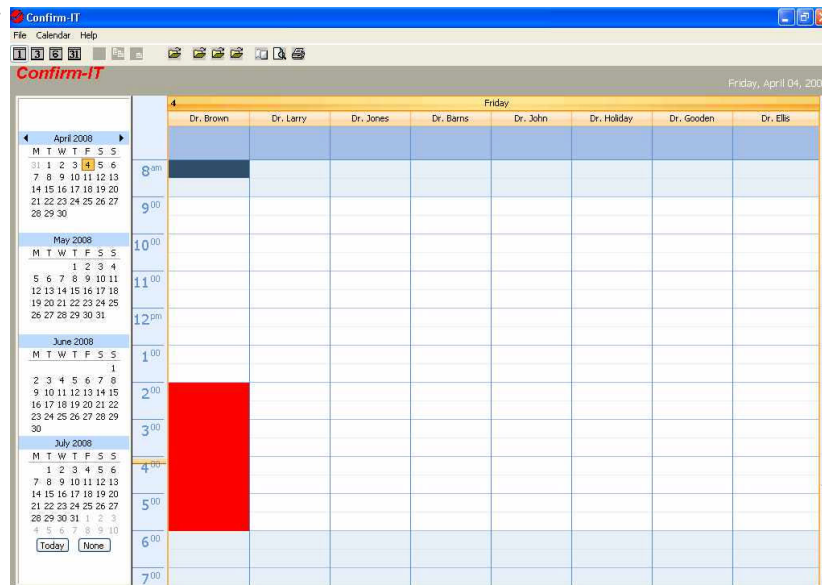


Figure 1 Confirm-IT Calendar with 8 Service Providers In Single Day View

GETTING STARTED, “The Basics”

Assumptions

After the software has been installed on the Confirm-IT user’s computer by clicking on Start and then clicking on Programs, Confirm-IT will be shown in the Programs menu. Click on Confirm-IT to start the application.


NOTE: *The very first time Confirm-IT is started, an installation Wizard presents a series of setup screens that guide you through the initial configuration. General information such as passwords, company work hours, staff member names, types of services provided and callout appointment reminder scheduling etc are entered*

at that time. Any subsequent changes to the initial configuration entries may be made by a designated administrator as required.

This User Guide assumes that the Wizard procedure has already been performed by the user in conjunction with the Confirm-IT software installation personnel.

The Wizard setup procedure is covered in the **Installation Manual** and also in the **Administrator /CSR Manual**.

Sign In

To start Confirm-IT, click the on the desktop icon  if present, or you may select Confirm-IT from the Programs menu.

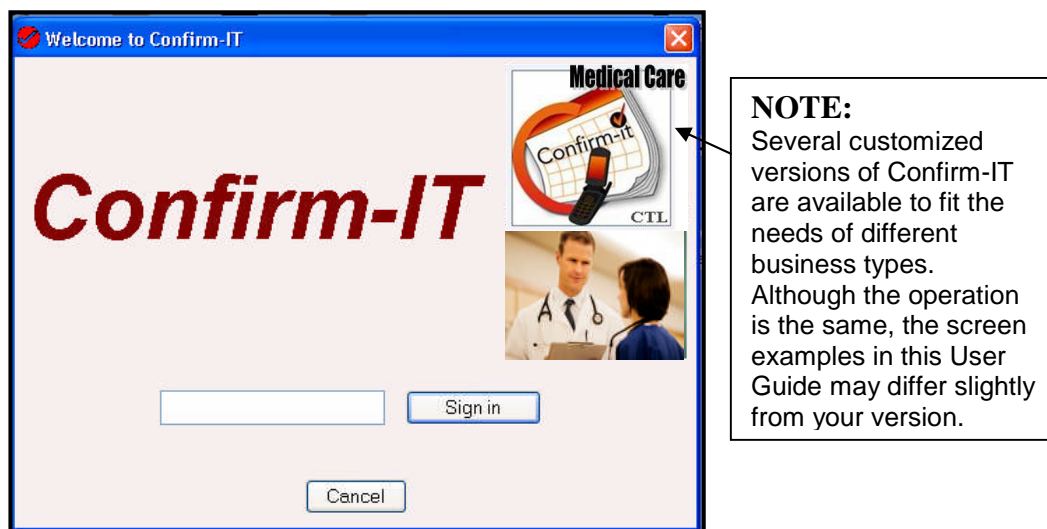


Figure 2 Confirm-IT Password Sign in Screen

A Welcome dialog box will appear requesting that you enter a sign-in password. Position the cursor inside the entry field and type in the *factory set password CONFIRM* or the *new password set up by the software installer during the Wizard procedure*. Click on the Sign-in button or press the Enter key.

Note: Passwords are case sensitive.

Selecting A Calendar View

After Sign-in, a **single day view** calendar will appear as the first screen. All active staff member's names will appear at the top of their related column. By clicking on the boxes labeled **1** **3** **6** **31** located in the upper left, you can change to calendar view to show 3, 6 or 31 days. You may also select a desired range of days by clicking on a mini monthly calendar and dragging the mouse to highlight the desired consecutive day range.

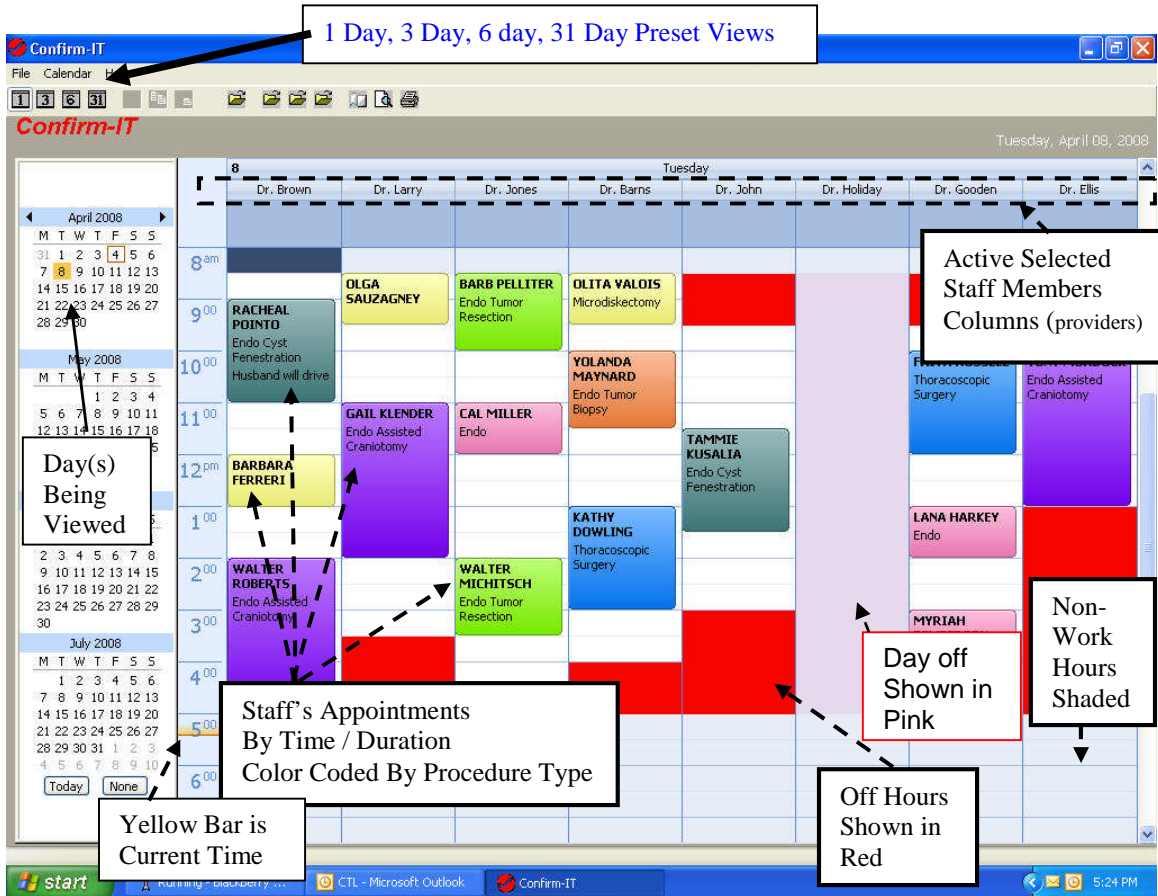


Figure 3 Confirm-IT Calendar Sections Explanation

Getting Started

The 1 day view was previously shown in **Figure 3** above. **Figure 4** shows samples of the 3, 6 and 31 preset views. Shown on the smaller calendar to the left, is the actual date range being displayed.

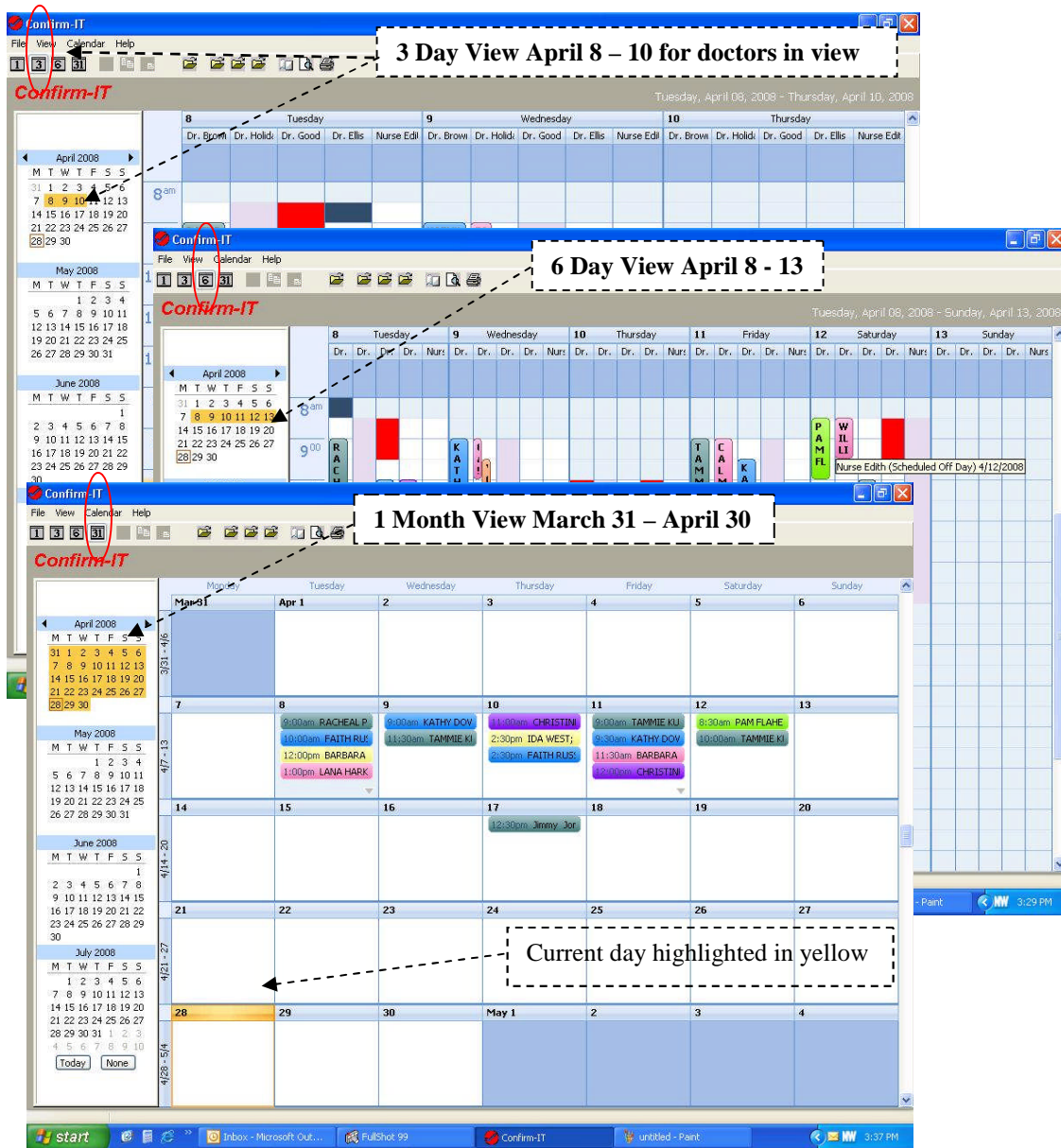


Figure 4 Sample 3, 6 and 31 Day Calendar Views

Drop Down View Menu

Confirm-IT is capable of displaying different service provider (staff member) views. Each service provider can be assigned to 1 of 6 views, *all views* or *none*. This feature was developed to allow the Confirm-IT calendar to be viewed on multiple PCs. Each user may see the same or different service providers that exist in the common database displayed. There may also be times when you want to only see appointments for a certain department or group of service providers. If multiple views have been configured by your system administrator, they will be listed in the drop down view menu.

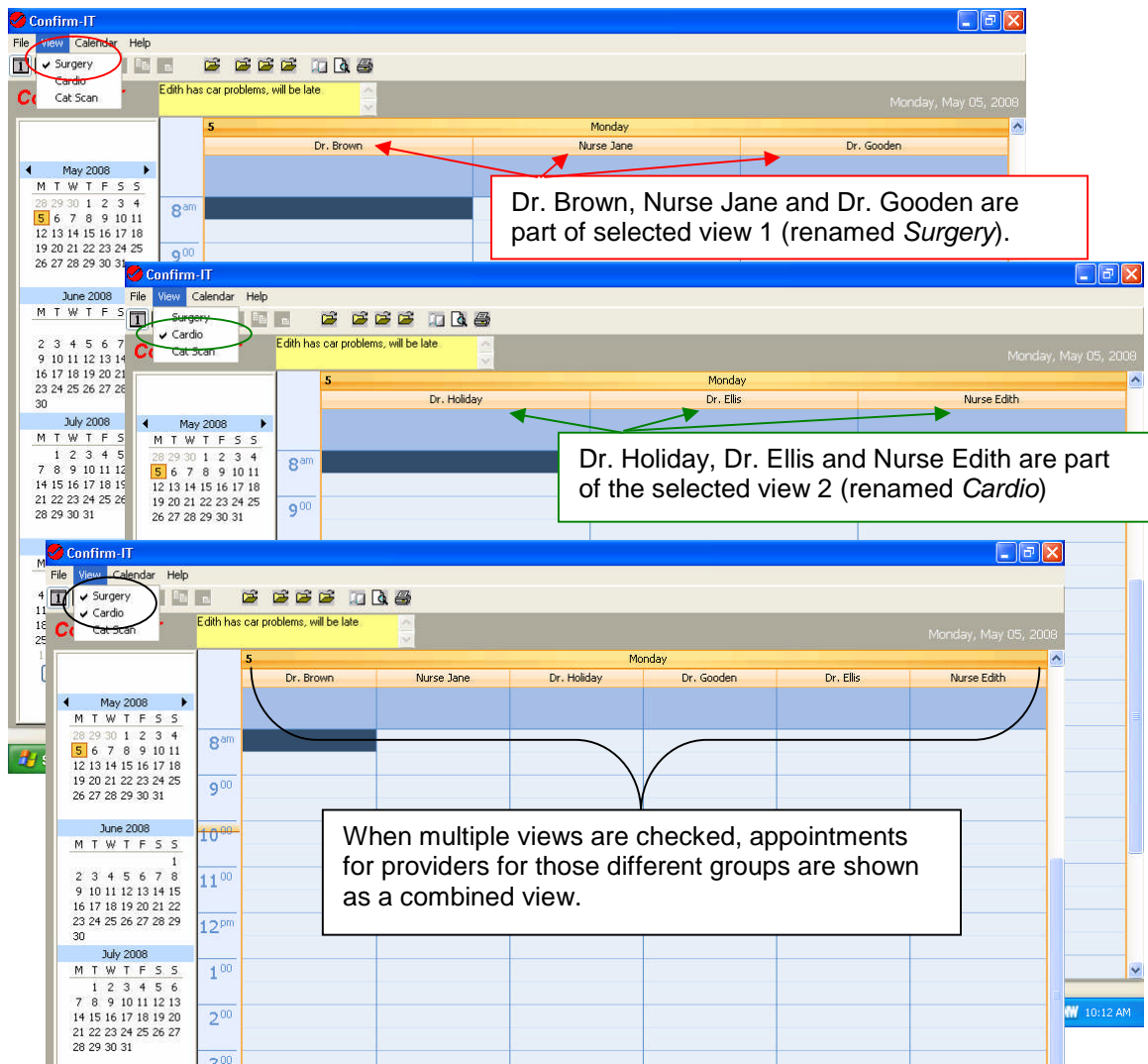


Figure 4A Selectable Provider Views

Calendar Note

A calendar note can be shown in the upper left of the calendar view screen. From the pull down Calendar menu, select **Create Calendar Note** to either create a note or add more text. A yellow background note area will appear to allow text input and presents options to save or cancel. To delete the note completely, double click on the note at the top left of the calendar screen.

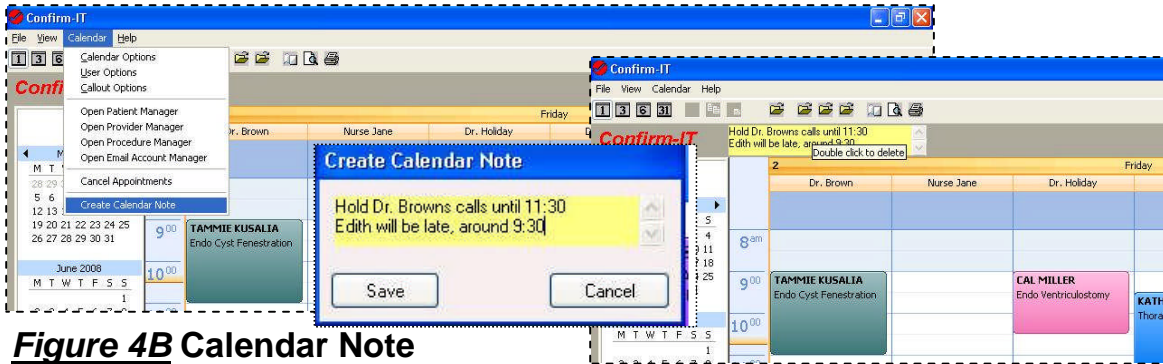


Figure 4B Calendar Note

Marking Holidays in the Calendar

The Calendar Options menu now has a **Holidays** tab. There are 24 possible holiday entries. Assuming 12 holidays per year, there are enough entries for 2 years. When an entered holiday date occurs, that day is automatically shaded out in the calendar view.

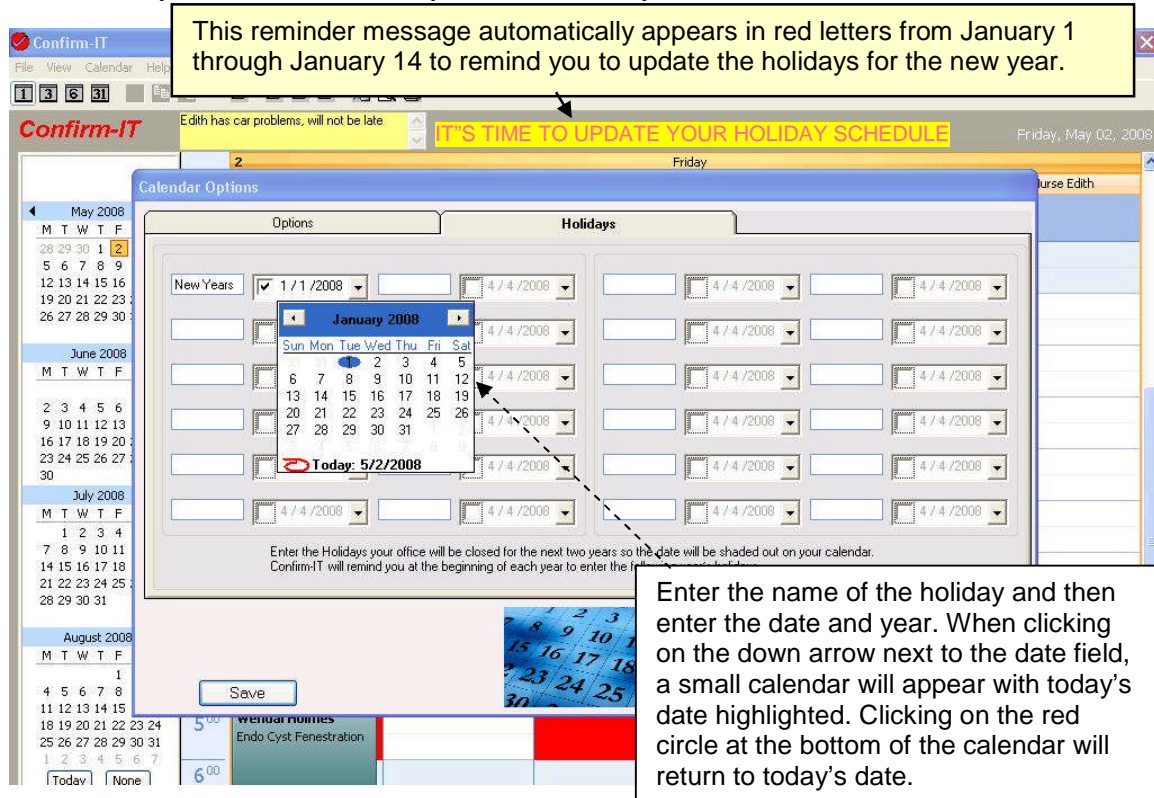


Figure 4C Entering Holidays / Update Reminder

SCHEDULING AN APPOINTMENT

To enter an appointment in the 1, 3 or 6 day view calendar, simply **double click on the desired time block in the column of the staff member you want to assign the appointment to**. A blank Appointment Schedule form will appear.

IMPORTANT: To avoid entering duplicate customers, it is best to ask for the customer's phone number and the spelling of their last name. A Search on the phone number plus at least the first few letters of the last name minimizes potential spelling errors and provides the best search results.

The screenshot shows the 'KEN HORAN - Appointment' form with several callouts:

- Top Callout:** Enter phone number digits as you would dial them. No need to enter spaces or dashes, Formats automatically after saving.
- Right Callout:** The application you purchased may include "Notify Now". Different from a Scheduled reminder, after entering an appointment, clicking the **Enable Notify Now** button and the **Save** button will trigger a notification to the media selected in the check boxes below it. It is designed to notify a person that a service such as an available table or golf tee time etc. has become available. If Confirm-IT is connected to analog ports of a phone system, the optional Transfer Feature can be utilized to flash the line and connect to a live attendant.
- Bottom Callout:** The down arrow next to an input field indicates that there is a drop down menu that shows a list of choices to select from.
- Payment Type Callout:** NOTE: Payment Type is not applicable to Confirm-IT Medical Care application.

Figure 5 Blank Appointment Form

This close-up shows the 'Appointment Information' section. The 'Procedures' dropdown menu is open, displaying a list of options: Endo Ventriculostomy, Off Day, Off Hours, Endo Ventriculostomy (highlighted), Endo Tumor Biopsy, Microdissectomy, Thoracoscopic Surgery, Pancreas Transplant, and Kidney transplant.

Scheduling An Appointment

Type part or all of the patient’s last name and phone number. Click on the **Search** button to see if they already exist in the patient database. If there is more than one match (such as other family members), a list of names appears in a Search Results window. If the matching customer name appears in the list, simply highlight that row, double click or click **OK** and all information is transferred.

Click to enable reminder types. Can select multiple. **Must Record Reminder Announcements.**
 (See Administrator / CSR Manual “Recording Announcements”)

Enter notes that stay with this customer profile

Enter notes regarding this appointment only

When the customer is paying for the service provided, the payment type can be selected. The appointment can be marked Closed by clicking the **Close** button. The letter “C” will appear in the calendar for this appointment.

Pop up Search Results window appears if Search finds more than one match for information entered.

First Name	Last Name	Address	City	State	Zip	Phone #	Alt.
Abby	Filenowski	2651 Mohegan Rd	Shelton	CT	06484	929-9566	
Abby	Nazario	43 Bruce Drive	Shelton			922-1893	414
Abby	Scala	18 Wicklow Lane	Shelton	Ct	06484	929-0706	

JAMES GRIM; Throat Cul C

Figure 6 Appointment Functions

Refine Search, Search Again

When entering an appointment, if the information entered locates multiple matches for a previous patient or customer, a secondary search screen appears. It shows what key words were entered and allows you to change or add additional information to search on and search again to refine the search.

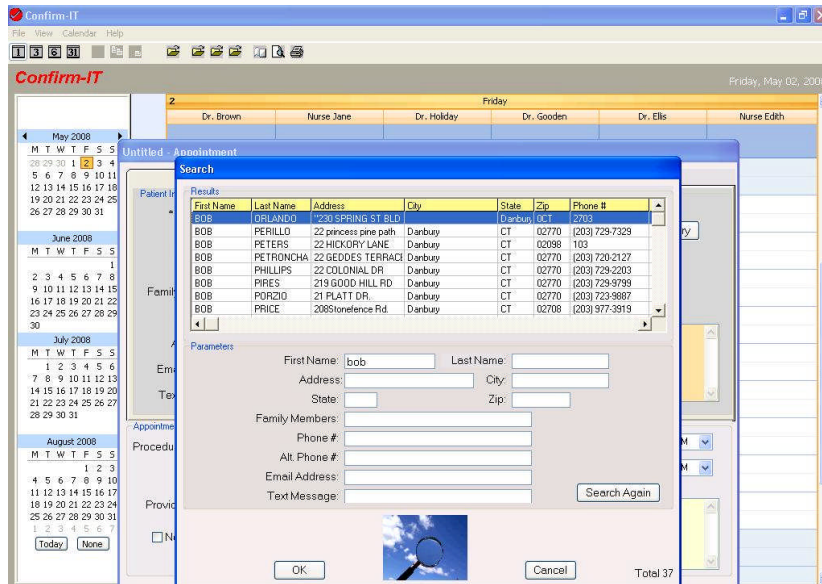


Figure 6A Search Results – Search Again

Appointment Screen

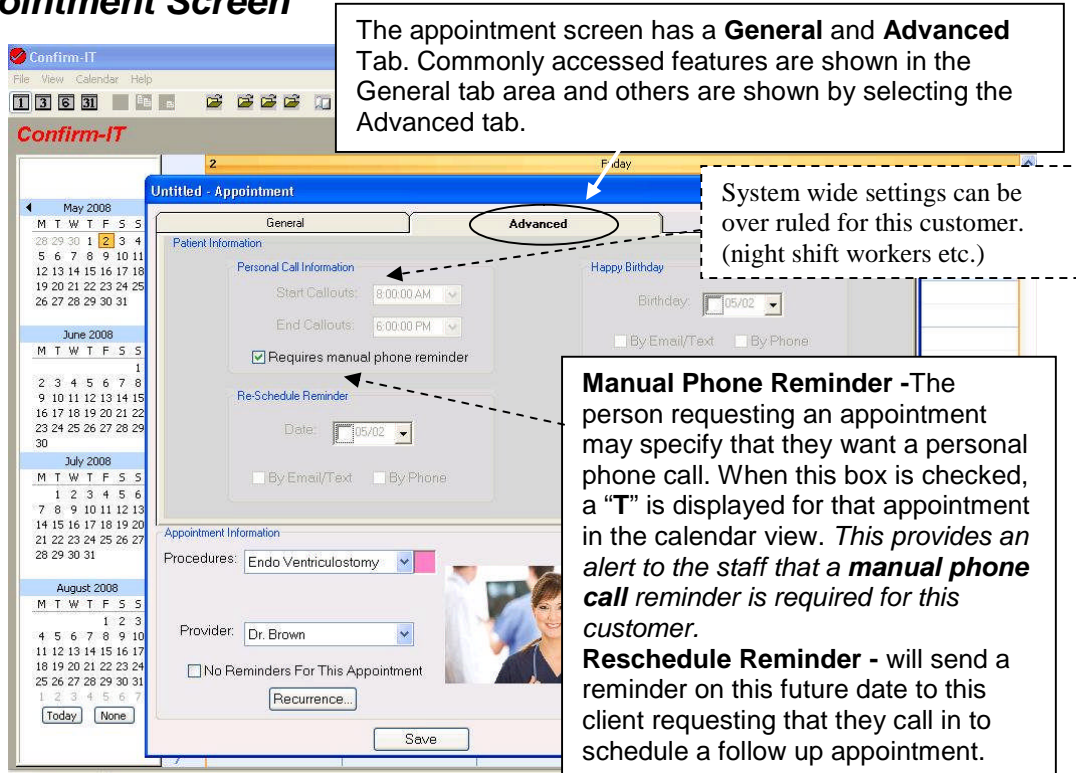


Figure 6B Appointment Screen, Manual Phone Reminder

Scheduling An Appointment

Confirm-IT can send Email and Text Message appointment reminders to customers if your system has an Internet connection and Email account set up.

The customer's Email address or mobile phone information may be entered in the **Email Address** field.

To send text messages to a mobile phone, the phone number and service address must be entered in the **Email Address** field. Since each mobile phone service has a unique text service address, a pull down list of known available mobile service providers is available by double clicking on the **Email Address** field. By entering the customer's 10 digit mobile phone number and selecting the service provider from the list, the combined information will automatically be entered after clicking the **Convert to Address** button.

The screenshot displays the 'Johnny Jones - Appointment' form. The 'Customer Information' section includes fields for First Name (Johnny), Last Name (Jones), Address, City, State, Zip, Phone #, and Email Address. The 'Appointment Information' section shows the Service as 'Men's Haircut'. A 'Text Messaging Wizard' dialog box is open, prompting for a 10-digit cell phone number (203 925 1515) and a cell provider selection. The 'Convert to address' button is highlighted. A tooltip bubble points to the 'Email Address' field, explaining that double-clicking it will open the wizard. A 'NOTE' states that if email fields are grayed out, no internet email service is set up. The 'Save' button is also visible.

A mobile phone text message address could be entered in the Email Address field instead. If you move the mouse pointer over the Address field, a tool tips bubble will appear. Double clicking on this field will produce a convenient mobile service provider list. Enter the 10 digit mobile phone number, click the proper **cell provider** and then click the **Convert to address** button. The mobile text address will now appear in the Email Address field.

NOTE: If Email Fields are grayed out, no Internet Email service has been setup for your system.

Click the **Save** button.

Figure 7 Text Message To Mobile Phone

Recurring Appointments

Confirm-IT has the ability to create recurring appointments for customers or patients that have regularly scheduled appointments. Recurring appointments will be identified by a circular arrow icon in the appointment box in the calendar.

Recurrences can be set weekly, monthly, yearly, the first Monday of each month etc. Since it takes a while to calculate forward recurrence dates, the software has a limitation of up to 53 recurrences per sequence which allows a full year of recurrences to be scheduled. When the recurrence sequence reaches the half way point, and that appointment is set to **Closed** (see **Figure 6**), a reminder window will appear asking if you would like to extend another recurrence sequence to the end of this one.

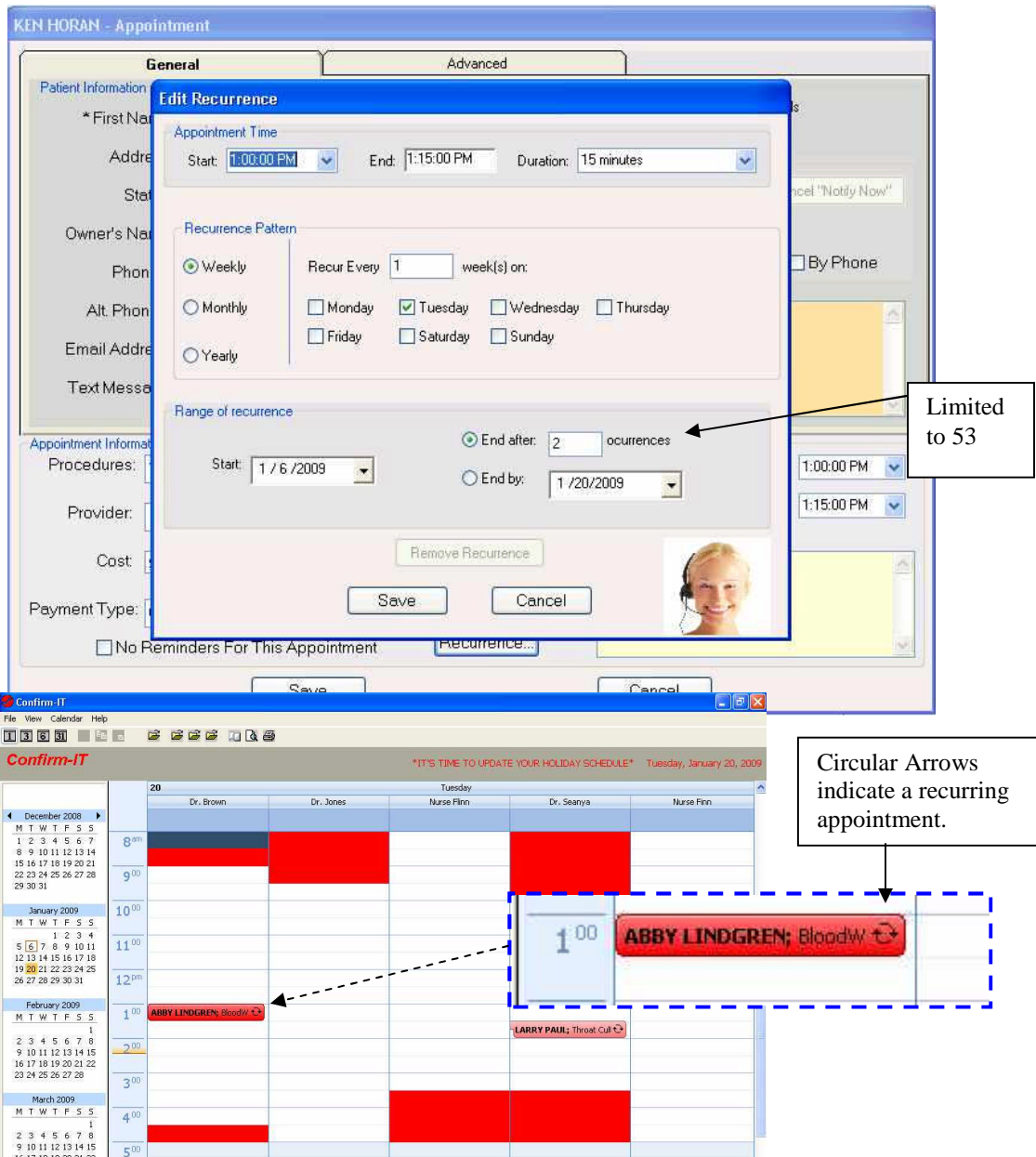


Figure 8 Recurring Appointment Calendar Icon

Tool Tips & Right Click Options Menus

To provide more detail for items shown in the calendar, the **tool tips** feature is available. By simply moving the mouse cursor and “hovering” over a colored section or appointment, additional detail will be shown. The amount of detail shown is programmable by the administrator in the user options section.

By **right clicking** on an appointment, a list of options will be displayed.

Open – Opens full customer information / appointment information screen.

(Same as double clicking on the colored appointment block)

Delete – Deletes this appointment from the database.

Notify Customer To Cancel this Appointment – Will notify this appointment holder that the business has cancelled their appointment due to staff unavailability or other conflict and should be rescheduled. An “X” will appear in the colored appointment and after the notification has been completed, it will change to “X✓”.

Customer cancelled this Appointment – Choose if the customer calls in and cancels their appointment. Since the customer is the one who cancelled the appointment, no reminder will be given.

Enable Move/Resize – Allows you to move appointment to different time or day or stretch or shrink the appointment duration by dragging the top or bottom edge.

View/Edit Customer Notes – Displays customer notes from main customer information window.

Re-Open – As explained in **Figure 6**, you can show payment received by tagging the appointment **Closed**. **Re-Open** removes the “C” in the appointment.

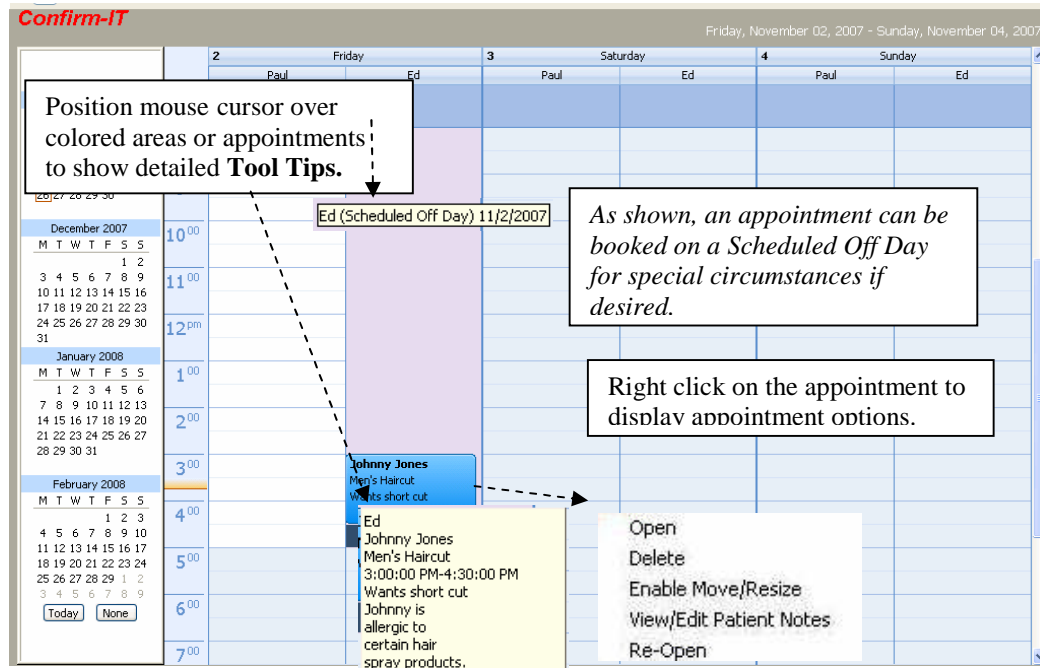


Figure 9 Tool Tips Information Bubbles

Viewing Only a Single Staff Member's Appointments

In any calendar view where multiple staff member columns are shown, you can narrow the view to see the appointments for a single staff member. By double clicking on the name located at the top of the column of the desired staff member, a one day view of only that member's appointments is displayed. You can now select multiple day views but only the selected member's appointments will be shown. It may be helpful to your service staff to printout each of their daily scheduled appoints and distribute them for quick reference. To return to the full staff member view, double click on this staff member's name at the top of any column.

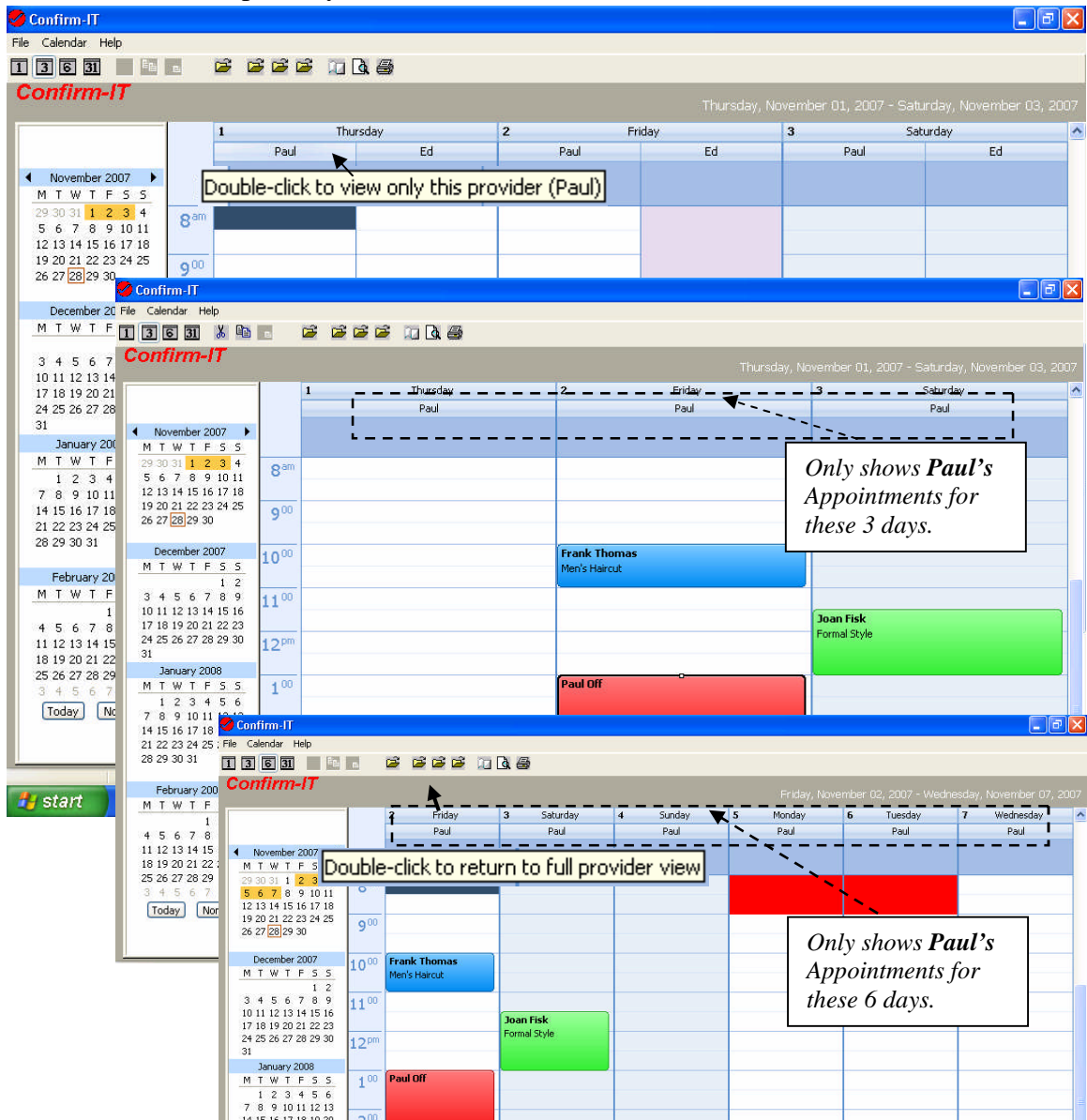


Figure 10 Single Staff Member's Appointments View

Additional Callout Features

In addition to the appointment reminder functionality included in all versions of Confirm-IT, the Notify Now, Range Appointment and Date Appointment features have been added *to applicable Confirm-IT versions*. The associated tabs for these new features will only be shown in the Callout Options menu if that feature is present.

Notify Now – Different from a Scheduled reminder, clicking the Enable **Notify Now** button plus the **Save** button in the Customer Manager screen will trigger a notification to the media selected in the check boxes below it (Email/Text Phone).
(See also Figure 4)

It is designed to notify a person that a service such as an available table or golf tee time etc. has become available.

If Confirm-IT is connected to analog ports of a phone system, the optional Transfer Feature can be utilized to flash the line and connect to a live attendant.

NOTE – A single special “Notify Now” company prompt must be recorded using the Notification Message recording GUI or the Telephone User Interface (TUI).

Restaurant Example:

“Your table is ready, please come to the hostess desk, thank you.”

Veterinarian Example:

“Your pet is ready to be picked up. Please call us at 555-1212 between 3 and 5 PM”.

(refer to Confirm-IT Administrator/CSR Manual)

The screenshot shows the 'Ken G - Appointment' window with the 'General' tab selected. The 'Customer Information' section includes fields for First Name (Ken), Last Name (G), Address, City, State, Zip, Family Members, Phone #, Alt. Phone #, Email Address, and Text Message. The 'Appointment Information' section includes Service (Balcony), Cost (\$0.00), Provider (Queue), Start time (5/7/2008 1:30:00 PM), and End time (5/7/2008 2:30:00 PM). The 'Notify Now' progress indication is shown in the top right corner, with a progress bar and the text 'Complete 05/07/08 03:03 PM'. The 'Notify Now' button is highlighted, and the 'By Email/Text' and 'By Phone' checkboxes are checked. The 'Customer Notes' field is empty.

Opening the appointment window after enabling Notify Now will show a progress indication.

- **Notify Now Pending**
- **Complete dd/mm/yy hh/mm**
- **Fail (not answered)**

NOTE:

Since Notify Now should be a single callout. The Call Out options “Notify Now” tab settings are as follows:

- Busy Retry Attempts = 2
- RNA Retry Attempts = 2
- Wait Before Bsy Retrys = 1
- Wait Before RNA Retry = 1

Figure 11 “Notify Now” Progress Indication

At the time your system administrator set up the names and types of Services your company performs, it was determined whether the service is a conventional appointment reminder or a Range Appointment or Date Appointment type.

Range Appointment – For all Confirm-IT applications *except Personal Care*, the service related Range Appointment is included and allows an appointment reminder message to specify a start and end time range. As an example, if a “range appointment” was entered in the calendar between 8 A.M. and 11:30 A.M., the reminder message would specify this time range.

There is a new prompt that must be recorded using PCGUI with a microphone or the TUI.

Example: “This is a reminder that our service person will be at your home on [date] between [start time] and [end time]. Please contact our office at 555-1212 to reschedule.”

To utilize the Range Appointment feature, **Range** must be selected from the Service Type pull down menu in the Services Manager menu.

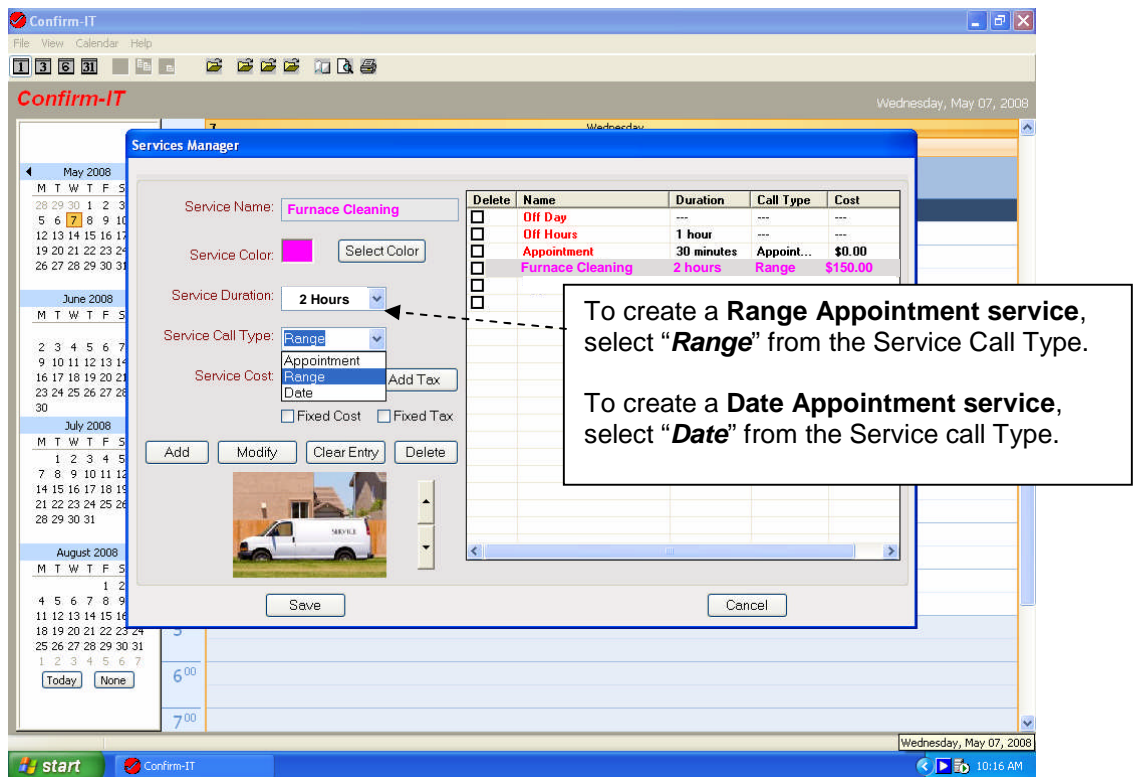


Figure 12 “Range” and “Date” Reminder Call Types

Date Appointment – For appointment reminders that do not have a specific time of day associated with them, the **Date Appointment** reminder feature can be used. Even though an appointment for this service is entered in the calendar in a certain time block, the reminder message to the customer will only specify the date of the appointment. Creating a Date Appointment type service is the same as Range Appointment (Fig 10).

Help Menu Additions

The pull down Help menu has some new additions.

- **Confirm-IT User Guide** can be viewed from this menu.
- **Confirm-IT Icon Chart** – Explains the meaning of the appointment status characters that appear in the appointment blocks of the calendar.
- **Installer Options** – A link for the installer technician to connect to the Advanced programming screens of the Confirm-IT Server. It has its own viewer and will automatically connect to the IP address of the server. Access to this area requires the Installer Level password.

Using a Microphone to Record Notification Messages

Starting with Version 2.0.61, the system administrator may record Notification Messages using the record and playback **Graphical User Interface (GUI)**. It allows message recording using a microphone by utilizing a sound card and speakers of the client PC.

Telephone User Interface (TUI) Additions

There are two new callout types that were introduced with Confirm-IT Version 2.0.32. If the **Appointment (Date)** and/or **Appointment (Range)** and **Reschedule** features are included in your Confirm-IT application, additional callout prompts will need to be recorded. The main menu of the TUI now gives options for recording these new prompts.

Customizing Confirm-IT

Your Confirm-IT application has been configured by the installer or system administrator to best match your daily business routine requirements. It is possible that some available features have been disabled or limited by the system administrator. Even though you may not currently have access to certain available features, it is important to know what all the possible features are in case your future needs change. The following areas are programmable.

You may want to discuss these options with your system administrator or authorized supplier if you feel that they could enhance your daily use of Confirm-IT.

Calendar Options Work week view
 Month view

User Options Appointment time scale
 Tool Tips format

Services Service name
 Service color
 Service duration
 Cost

Print calendar view