

Confirm-IT2™

By
CTL



User Guide

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INTRODUCTION

Overview of Confirm-IT2 (also referred to as “**CI2**”)

Confirm-IT2 (**CI2**) is an automatic appointment reminder system. It is similar to the original Confirm-IT product but does not include the graphical appointment scheduling calendar. It integrates with and compliments existing appointment scheduling calendar applications that do not offer an appointment reminder feature. CI2 automatically sends **Voice, Email and Text Message appointment reminders** to customers or patients who have scheduled appointments.

Customers receiving a phone call appointment “voice reminder” may be given the **option to interact** by pressing a dial pad digit to confirm, or cancel. If CI2 is connected to a phone system, it can transfer to a live person for re-scheduling.

Confirm-IT2’s main “**Yesterdays and Today’s Confirmations**” client PC display screen dynamically shows the status of the latest appointment reminder activity and callout results within the last 48 hours. **Appointment Reports** and **Confirmation Reports** allow viewing of appointment reminder details selectable by a time and date range.

Confirm-IT2 retrieves appointment reminder data information by **Manual import** or by **Auto import** that performs a new import each time it detects a change made to the **appointment database file**. Confirm-IT2 builds an internal database from each appointment imported.

Only the pertinent appointment information is imported such as *First Name, Last Name, Phone Number, Email Address, Appointment Date, Provider, Start Time and End Time*.

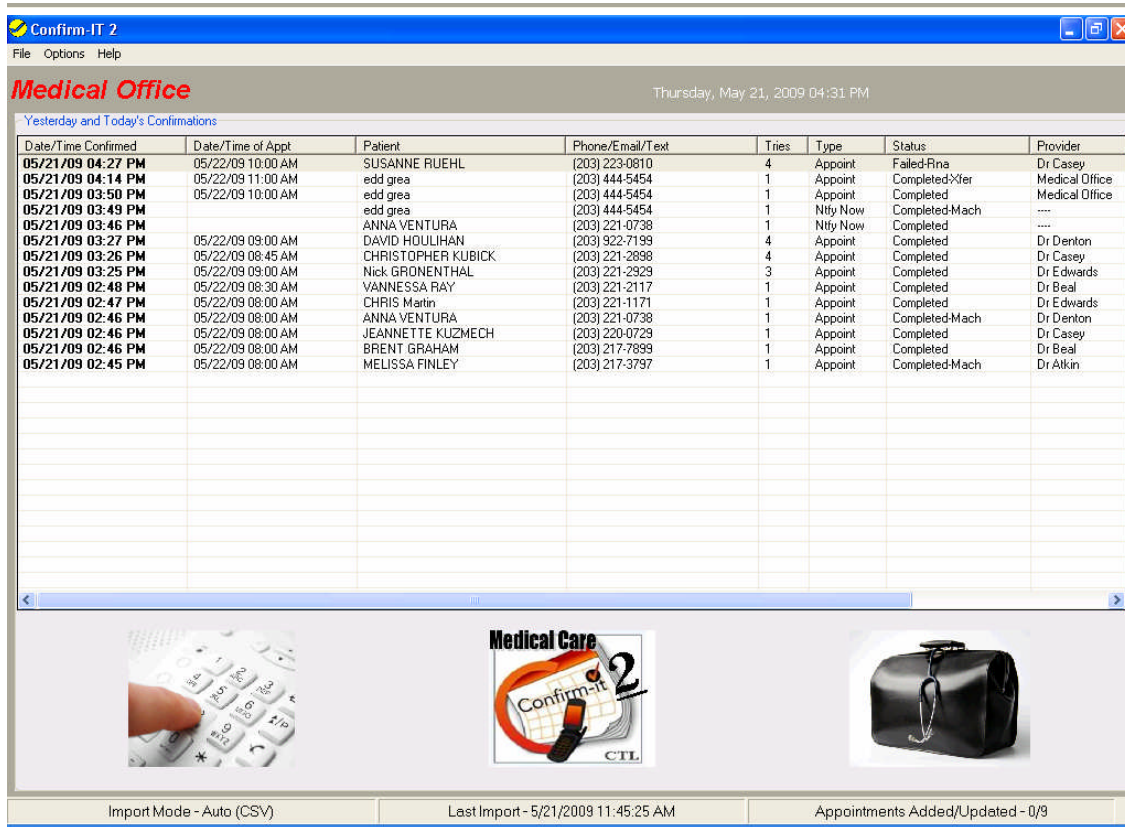
No other personal or medical information is present in the Confirm-IT2 internal database. The required reminder information must be presented by the existing appointment calendar application to CI2 in one of two ways:

- The Customer Database to be imported into Confirm-IT must be in Comma Separated Value (CSV), MDB / ACCDB, XLS, XLSX, DBC, DBF, DB, TAB, or ODBC format file accessible by the Confirm-IT user PC. Alternately, most existing scheduling software can perform a “Print to File” operation which Confirm-IT2 can convert. The Print to File must contain the required information in a structured form. ***This is a customized option per application and available after a sample file is tested by CTL.***

Confirm-IT2 Stand Alone consists of **two individual components**:

- Turn-Key Confirm-IT2 Linux Server Hardware, with **Pre-Installed Confirm-IT2 Application**
- Confirm-IT2 Client (User) Software for installation on User provided PC
 - *In small office environments it may be that the Confirm-IT2 client software will be installed on the same PC as the one running the existing appointment calendar schedule application.*

Getting Started



Confirm-IT 2
File Options Help
Medical Office
Thursday, May 21, 2009 04:31 PM
Yesterday and Today's Confirmations

Date/Time Confirmed	Date/Time of Appt	Patient	Phone/Email/Text	Tries	Type	Status	Provider
05/21/09 04:27 PM	05/22/09 10:00 AM	SUSANNE RUEHL	(203) 223-0810	4	Appoint	Failed-Rna	Dr Casey
05/21/09 04:14 PM	05/22/09 11:00 AM	edd grea	(203) 444-5454	1	Appoint	Completed-Mach	Medical Office
05/21/09 03:50 PM	05/22/09 10:00 AM	edd grea	(203) 444-5454	1	Appoint	Completed	Medical Office
05/21/09 03:49 PM		edd grea	(203) 444-5454	1	Nfty Now	Completed-Mach	----
05/21/09 03:46 PM		ANNA VENTURA	(203) 221-0738	1	Nfty Now	Completed	----
05/21/09 03:27 PM	05/22/09 09:00 AM	DAVID HOULIHAN	(203) 922-7199	4	Appoint	Completed	Dr Denton
05/21/09 03:26 PM	05/22/09 08:45 AM	CHRISTOPHER KUBICK	(203) 221-2898	4	Appoint	Completed	Dr Casey
05/21/09 03:25 PM	05/22/09 09:00 AM	Nick GRONENTHAL	(203) 221-2929	3	Appoint	Completed	Dr Edwards
05/21/09 02:48 PM	05/22/09 08:30 AM	VANNESSA RAY	(203) 221-2117	1	Appoint	Completed	Dr Beal
05/21/09 02:47 PM	05/22/09 08:00 AM	CHRIS Martin	(203) 221-1171	1	Appoint	Completed	Dr Edwards
05/21/09 02:46 PM	05/22/09 08:00 AM	ANNA VENTURA	(203) 221-0738	1	Appoint	Completed-Mach	Dr Denton
05/21/09 02:46 PM	05/22/09 08:00 AM	JEANNETTE KUZMECH	(203) 220-0729	1	Appoint	Completed	Dr Casey
05/21/09 02:46 PM	05/22/09 08:00 AM	BRENT GRAHAM	(203) 217-7889	1	Appoint	Completed	Dr Beal
05/21/09 02:45 PM	05/22/09 08:00 AM	MELISSA FINLEY	(203) 217-3797	1	Appoint	Completed-Mach	Dr Atkin

Import Mode - Auto (CSV) Last Import - 5/21/2009 11:45:25 AM Appointments Added/Updated - 0/9

Figure 1 Confirm-IT2 “Yesterday and Today’s Appointments Main Screen

GETTING STARTED, “The Basics”

Assumptions


After the software has been installed on the Confirm-IT2 user’s computer, you can start Confirm-IT2 by clicking on Start and then clicking on Programs, Confirm-IT2 will be shown in the Programs menu. Click on Confirm-IT2 to start the application.

NOTE: *The very first time Confirm-IT2 is started, an installation Wizard presents a series of setup screens that guide you through the initial configuration. General information such as passwords and callout appointment reminder scheduling etc are entered at that time. Any subsequent required changes to the initial configuration entries may be made by persons who have the administrator level password.*

This User Guide assumes that the Wizard procedure has already been performed by the user in conjunction with the Confirm-IT2 software installation personnel. It also assumes that all reminder voice messages have been recorded and Email/Text message content entered. Some explanation of these procedures will be included in this manual in case changes are necessary.

The complete Wizard setup and detailed Administration procedures are covered in the **Installation Manual**.

Sign In

To start Confirm-IT2, click the on the desktop icon  if present, or you may select Confirm-IT2 from the Programs menu.



NOTE:

Several customized versions of Confirm-IT2 are available to fit the needs of different business types. Although the operation is the same, the screen examples in this User Guide may differ slightly from your version. The words "Customer" and "Patient" will be used interchangeably in this document

Figure 2 Confirm-IT2 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 CONFIRM2* 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.

The following main screen will appear.

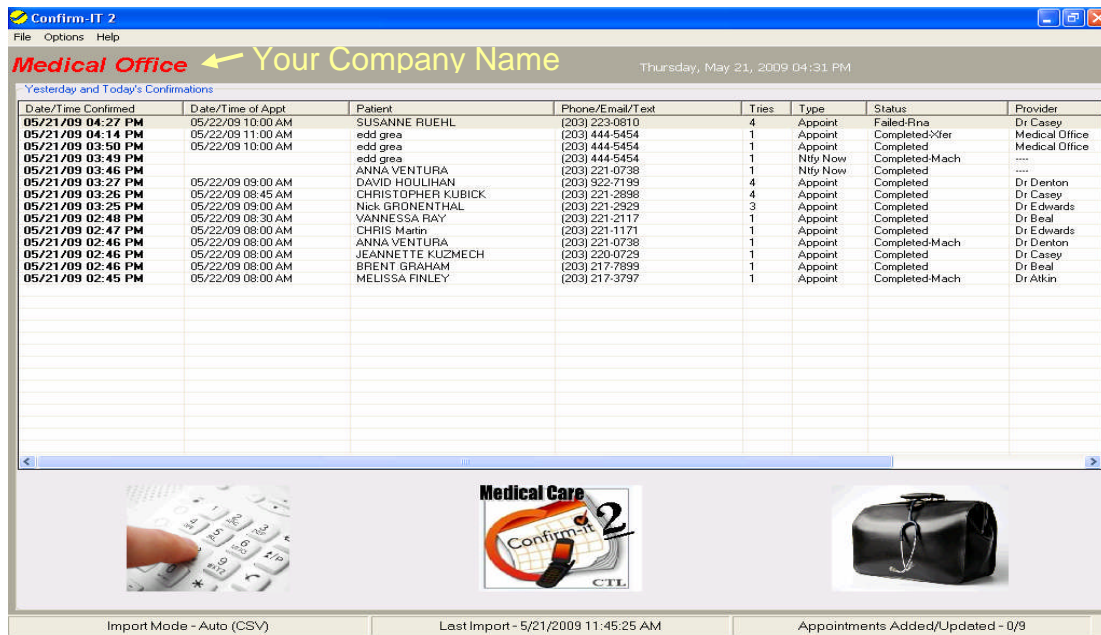


Figure 3 Confirm-IT2 "Yesterday and Today's Appointments Screen"

About The Main Appointment Confirmation Status Screen

Personal Reminder Notepad for User

Familiar Pull-Down Menus See Figure 12

Callout, Email or Text Appointment Reminder Information Column Descriptions.

Confirm-IT 2
File Options Help

Medical Office Print appointment report for Ken every Monday 9 AM. Thursday, May 21, 2009 04:31 PM

Yesterday and Today's Confirmations

Date/Time Confirmed	Date/Time of Appt	Patient	Phone/Email/Text	Tries	Type	Status	Provider
05/21/09 04:27 PM	05/22/09 10:00 AM	SUSANNE RUEHL	(203) 223-0810	4	Appoint	Failed-Fina	Dr Casey
05/21/09 04:14 PM	05/22/09 11:00 AM	edd grea	(203) 444-5454	1	Appoint	Completed	Medical Office
05/21/09 03:50 PM	05/22/09 10:00 AM	edd grea	(203) 444-5454	1	Appoint	Completed	Medical Office
05/21/09 03:49 PM		edd grea	(203) 444-5454	1	Ntly Now	Completed-Mach	----
05/21/09 03:46 PM		ANNA VENTURA	(203) 221-0738	1	Ntly Now	Completed	----
05/21/09 03:27 PM	05/22/09 09:00 AM	DAVID HDULIHAN	(203) 922-7199	4	Appoint	Completed	Dr Denton
05/21/09 03:26 PM	05/22/09 08:45 AM	CHRISTOPHER KUBICK	(203) 221-2898	4	Appoint	Completed	Dr Casey
05/21/09 03:25 PM	05/22/09 09:00 AM	Nick GRONENTHAL	(203) 221-2929	3	Appoint	Completed	Dr Edwards
05/21/09 02:48 PM	05/22/09 08:30 AM	VANESSA RAY	(203) 221-2117	1	Appoint	Completed	Dr Beal
05/21/09 02:47 PM	05/22/09 08:00 AM	CHRIS Martin	(203) 221-1171	1	Appoint	Completed	Dr Edwards
05/21/09 02:46 PM	05/22/09 08:00 AM	ANNA VENTURA	(203) 221-0738	1	Appoint	Completed-Mach	Dr Denton
05/21/09 02:46 PM	05/22/09 08:00 AM	JEANNETTE KLZMECH	(203) 220-0729	1	Appoint	Completed	Dr Casey
05/21/09 02:46 PM	05/22/09 08:00 AM	BRENT GRAHAM	(203) 217-7899	1	Appoint	Completed	Dr Beal
05/21/09 02:45 PM	05/22/09 08:00 AM	MELISSA FINLEY	(203) 217-3797	1	Appoint	Completed-Mach	Dr Atkin

Bold information indicates **today's** activity, Regular text displays yesterday's activity.

Service Confirm-it 2 CTL

Indicates Appointment, Appointment Range, Appointment Date, Reschedule, Birthday, Notify Now, Provider Canceled or Inactive type of notification.

Import Mode - Auto (CSV) **afc** Last Import - 9/4/2008 1:46:45 PM Appointments Added/Updated - 10/0

Appears only if required formatting by automatic file conversion CTL customized option is present.

*If **Auto** Import Mode is selected, Confirm-IT2 will poll the appointment file every 30 seconds to check for new client entries, changes to existing client contact data or appointment date/time changes.

If input mode is set to **Manual**, the user will need to perform an import each time the appointment database file has changed or a new appointment has been added.

- If the Import mode is set to **Manual**, this area shows the last time an import was completed.
- If the Import mode is set to **Auto**, this will show the last time Confirm-IT2 detected that the appointment database file has been modified and completed a new import.

Appoint
"Cancel"
"Birthday"
"Close"
"Close"
"Inactive"
"Re-Sched"
"Ntly Now"
"Appt Rng"
"Appt Dat"

* The Import Mode is determined during the installation of Confirm-IT2.

This area indicates the amount of appointments that were **added** to the callout queue during the last import. (If for example only a phone number changed during the most recent import, no appointments would be added).

Figure 4 Main Appointment Status Screen

Using Confirm-IT2 (Import Modes)

The amount of involvement in the daily operation of Confirm-IT2 will depend on the Mode of operation that was selected from the File/ Import Appointment Manager menu during the software setup.

Most likely, **Auto Mode** was selected during the installation and the initial Import information fields have been set up, so there is not much involvement other than monitoring the dynamic Main screen and possibly running some reports. Confirm-IT2 scans the *appointment database file* every 30 seconds to see if there were any changes or additions since the last time it performed an automatic import. (See *Figure 4*)

If **Manual Mode** was selected a manual Import will need to be performed each time the *appointment database file* of the existing appointment scheduling application has been changed i.e. appointment added or an appointment date/time has been changed. After the initial import has been completed, the template information from the previous import such as file name and location and the column positions of the required data fields will still be present in the **Import Appointment Manager** screen. **There should be no need to change any of this information.** By clicking the **Import** button, the latest version of the *appointment database file* will again be imported into Confirm-IT2 after clicking the **Save** button.

Name and location of *appointment database file*

NOTE: If the file is in CSV format, some fields will not be present.

Database column number positions from last import.

(A) Start Time: 12 End Time: 13
Start Date: 11 End Date:

(B) Start Date/Time: End Date/Time:

Prov. First Name: Prov. Last Name: 14

Procedure ID * Appt ID: 0

Location ID

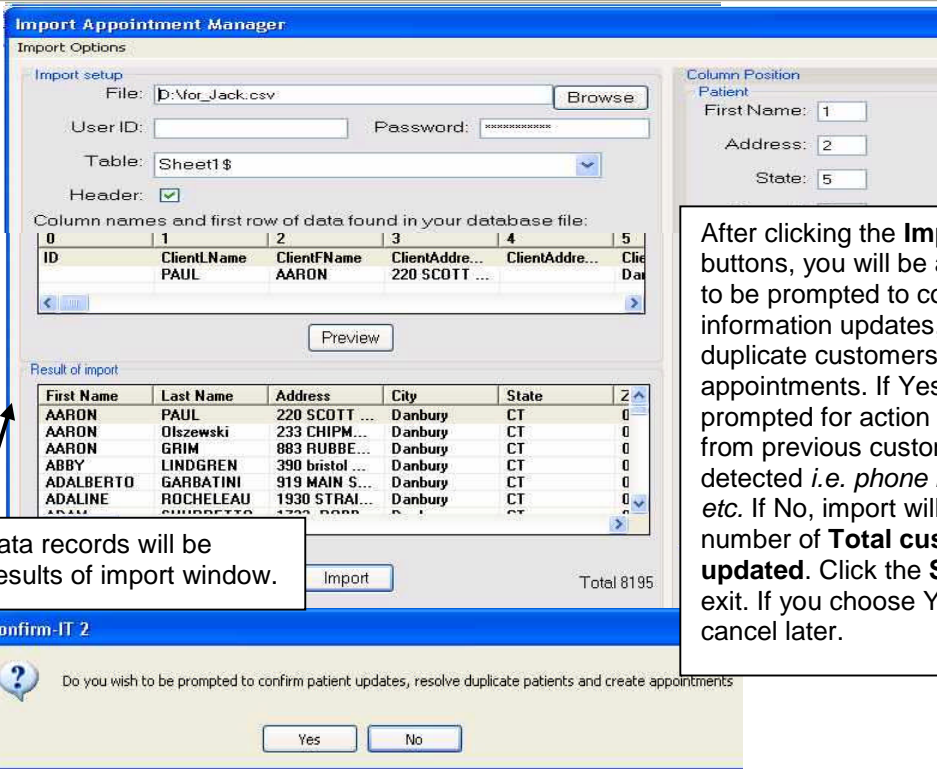
* * See Notes on next page

Total patients added: 0

Save

Figure 5 Import Appointment Manager Manual Import

Depending on your existing scheduling application, use only one date/time format set (A) or (B). DO NOT MIX

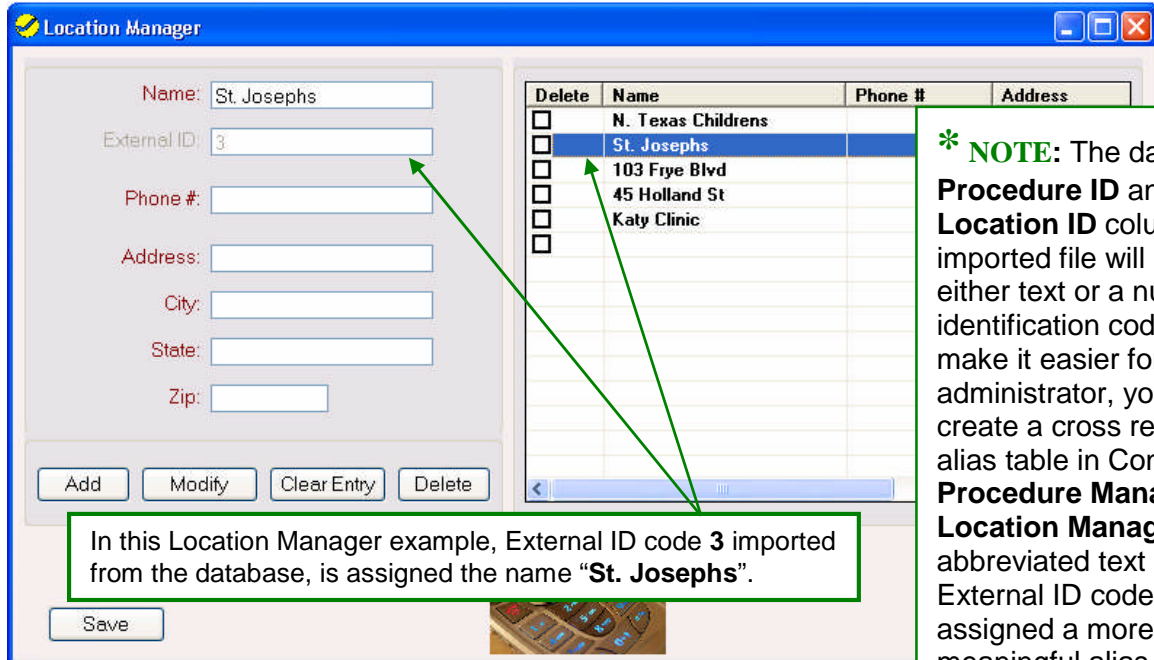


After clicking the **Import and Save** buttons, you will be asked if you want to be prompted to confirm customer information updates, resolve duplicate customers and create appointments. If Yes, you will be prompted for action if any changes from previous customer records are detected *i.e. phone number change etc.* If No, import will run and show number of **Total customers updated**. Click the **Save** button to exit. If you choose Yes, you may cancel later.

The imported data records will be shown in the Results of import window.

Figure 6 Manual Import Interaction Window

*** NOTE:** In most database files, there is a key (index/or ID) field that contains a **unique** (usually sequential) number that is assigned to each **appointment** entry. The column number of this field should be entered in the **App. ID Column Position** box. If the ID is entered and a date change is made to an appointment, CI2 can detect that it is only a date change and not a new appointment.



*** NOTE:** The data in the **Procedure ID** and **Location ID** column of the imported file will usually be either text or a number identification code. To make it easier for the administrator, you may create a cross reference alias table in Confirm-IT2 **Procedure Manager** and **Location Manager**. The abbreviated text or number External ID code can be assigned a more meaningful alias name in the patient manager screens and reports.

In this Location Manager example, External ID code 3 imported from the database, is assigned the name "St. Josephs".

Figure 6a Procedure ID to Name Cross Reference Table

Viewing and Printing Confirm-IT2 Reports

Confirm-IT2 provides 3 major report types: Confirmation, Appointment and Inactivity. These reports are viewed at the Confirm-IT2 User PC and can be printed.

The **Appointment Report** shows pending callouts and callout results for a specified date and time period, set in the **Report range** section of the screen. All customers are selected by default but you may select certain customers and disregard others.

If for some reason an imported appointment reminder needs to be Cancelled or marked for Deletion and deleted from the Confirm-IT2 Internal database, there is an option within the Appoint Report screen to do so.

(See Appointment Report **Figure 9 and 9a**)

IF A SCHEDULED APPOINTMENT HAS BEEN DELETED FROM THE EXISTING SCHEDULING SOFTWARE DATABASE FILE AND HAS ALREADY BEEN IMPORTED INTO CONFIRM-IT2, THE NOTIFICATION CALL IS STILL PENDING IN THE CONFIRM-IT2 SERVER. IT MUST BE MANUALLY DELETED OR CANCELLED FROM CONFIRM-IT2 ALSO TO STOP THE NOTIFICATION!

For any appointments that were deleted manually from the Confirm-IT2 internal database, you can limit the view to show those alone.

Drop Down Menus

In the upper left of the screen are the pull down menus that will be explained in the next pages.

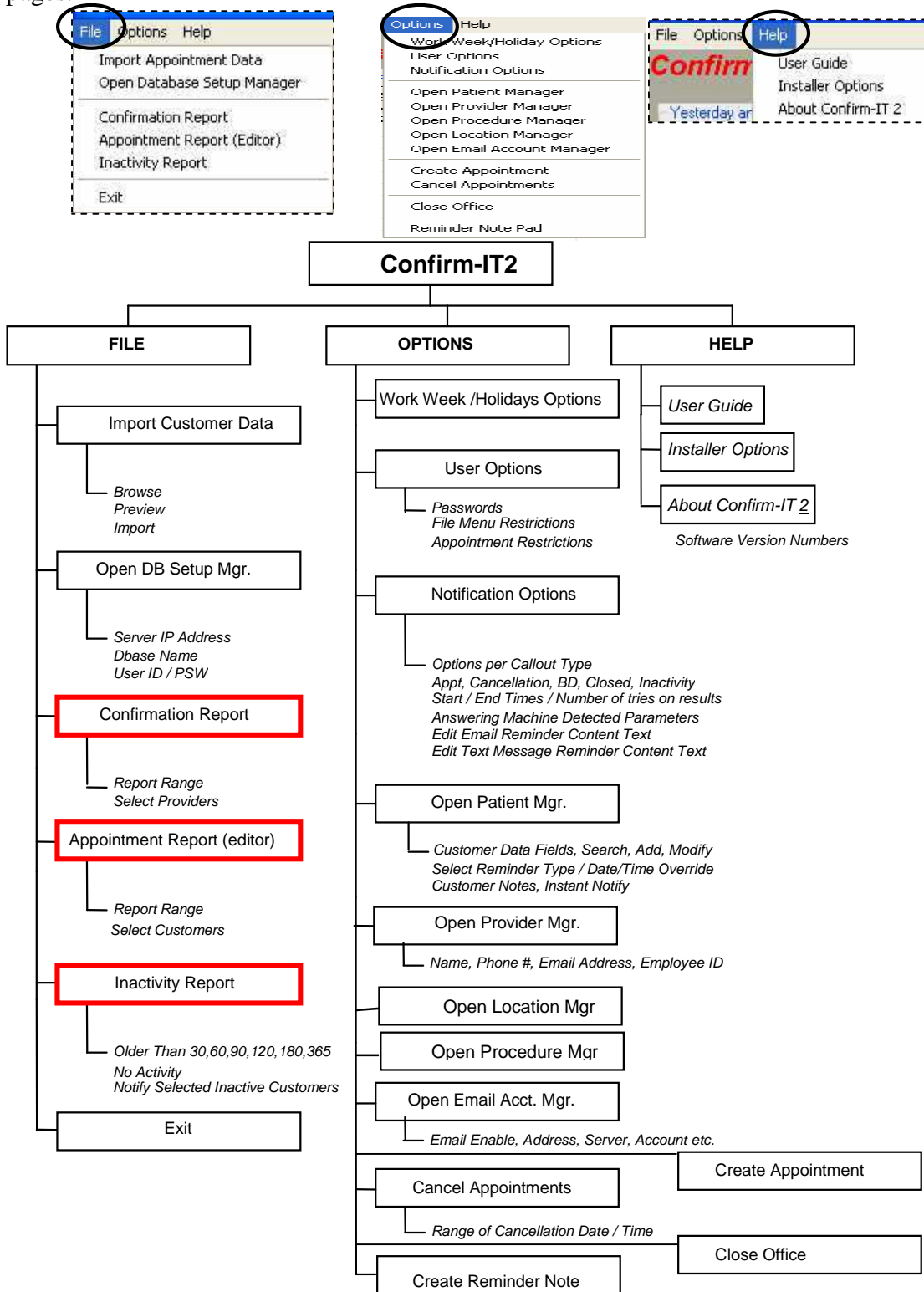


Figure 7 Confirm-IT2 Pull Down Menu Tree Diagram

Confirmation Report

Date/Time Confirmed	Date/Time of Appt	Patient	Phone/Email/Text	Tries	Type	Status	Provider
05/21/09 03:50 PM	05/22/09 10:00 AM	edd grea	(203) 444-5454	1	Appoint	Completed	Medical Of
05/21/09 04:14 PM	05/22/09 11:00 AM	edd grea	(203) 444-5454	1	Appoint	Completed-Xfer	Medical Of
05/21/09 04:18 PM	05/22/09 10:00 AM	SUSANNE RUEHL	(203) 223-0810	1	Appoint	Retry-Rna	Dr Casey
05/21/09 04:21 PM	05/22/09 10:00 AM	SUSANNE RUEHL	(203) 223-0810	2	Appoint	Retry-Rna	Dr Casey
05/21/09 04:24 PM	05/22/09 10:00 AM	SUSANNE RUEHL	(203) 223-0810	3	Appoint	Retry-Rna	Dr Casey
05/21/09 04:27 PM	05/22/09 10:00 AM	SUSANNE RUEHL	(203) 223-0810	4	Appoint	Failed-Rna	Dr Casey
05/22/09 01:50 PM	05/23/09 08:00 AM	BRENT GRAHAM	(203) 217-7899	1	Appoint	Canceled	Dr Beal
05/24/09 08:00 AM	05/25/09 09:30 AM	ZDLI ERRICO	(203) 221-7297	1	Appoint	Retry-Rna	Dr Beal
05/24/09 08:01 AM	05/25/09 10:00 AM	ANTONIO OBRIEN	(203) 221-3011	1	Appoint	Retry-Rna	Dr Casey
05/24/09 08:02 AM	05/25/09 10:00 AM	TONY MONTEF	(203) 221-3011	1	Appoint	Retry-Rna	Dr Denton

Figure 8 Callout Confirmation Report

The Confirmation report shows the callout results for a specified date and time period, set in the **Report range** section of the screen.

Callout results can be set to All or you may elect to only see call results for **Confirmed**, **Cancelled**, **Completed**, **Retry**, **Aborted-Err** or **Failed** callouts in the Status column.

NOTE: The **Aborted – Err** result indicates that there is a phone number format problem etc.

Additional status results:

Busy – *Called line busy* **Rna** - *(Ring no answer)* **Mach** – *(Answered by a machine)*
Xfer – *(Called party pressed “0”, Transferred to extension)* **Reor** - *(Reorder tone)*

If the called party presses a digit for Cancel, Confirm or Transfer, the dialed digit will also show in the printed report as long as the printer is set to **Landscape** print mode.

The Patient column displays the name of the person the callout was directed to and the Phone/Email/Text column displays the phone number called or the Email/Text address. The Tries column shows how many times the callout was attempted. **If the number of tries is a high value, it may be indicating line busy or invalid phone number conditions.**

As shown in the **“Callout Options Email / Text Message Content”** section of this manual, there are several different call types. The Type column indicates which type was associated with each callout.

Appointment Report

Appointment Report (Editor) 10:04:51 am S W R B C

Report Range/Limits
From: 5/12/2009 8:00:00 AM
To: 5/29/2009 5:00:00 PM
 Show Only Deleted Appointments
 Print/Save Patient Notes

Providers
 Medical Office
 Dr Atkin
 Dr Beal
 Dr Casey
 Dr Denton
 Dr Edwards
 Select All Clear All

Procedures
 Appointment Date
 Gen Physical
 30
 50
 20
 90
 61
 Select All Clear All

Locations
 N. Texas Childrens
 St. Josephs
 103 Frye Blvd
 45 Holland St
 Katy Clinic
 Select All Clear All

Patients
 JUDY SOUSA
 TRACEY STEWAR
 CATHY TORRICE
 DIANE VALENZUE
 ELIZABETH VECCI
 ANNA VENTURA
 KATHY ZIMINSKY
 Select All Clear All

Report View

Date/Time	Patient	Provider	Location	Procedure	Status
05/22/09 08:00 AM	ANNA VENTURA	Dr Denton	45 Holland St	20	
05/22/09 08:00 AM	CHRIS Martin	Dr Edwards	Katy Clinic	90	
05/22/09 08:00 AM	JEANNETTE KUZMECH	Dr Casey	103 Frye Blvd	50	
05/22/09 08:00 AM	MELISSA FINLEY	Dr Atkin	Katy Clinic	Gen Phys	
05/22/09 08:30 AM	VANNESSA RAY	Dr Beal	103 Frye Blvd	61	
05/22/09 08:45 AM	CHRISTOPHER KUBICK	Dr Casey	St. Josephs	Gen Phys	
05/22/09 09:00 AM	DAVID HOULIHAN	Dr Denton	45 Holland St	50	
05/22/09 09:00 AM	Nick GRONENTHAL	Dr Edwards	N. Texas Childrens	30	
05/22/09 10:00 AM	edd grea	Medical Office	N. Texas Childrens	Appointment	
05/22/09 10:00 AM	SUSANNE RUEHL	Dr Casey	N. Texas Childrens	Appointment	
05/22/09 11:00 AM	edd grea	Medical Office	N. Texas Childrens	Appointment	Completed
05/23/09 09:30 AM	ZOLI ERRICO	Dr Beal	St. Josephs	30	Canceled
05/25/09 09:30 AM	ANTONIO OBRIEN	Dr Casey		Appointment	Failed
05/25/09 10:00 AM				Appointment	Failed

By right clicking on an appointment with a future date and no notification has been sent yet, you can cancel that request from the Confirm-IT2 internal database. You may also mark it for deletion.

Cancel this Appointment
Delete

Figure 9 Appointment Report Right / Double Click Options

The Appointment report shows the callout results for a specified date and time period, set in the **Report range** section of the screen. All patients are selected by default but you may select certain customers and disregard others. The report can be saved as a CSV or text file or printed to provide a hard copy.

To view appointments that were **marked for deletion** manually from the Confirm-IT2 internal database, check the **Show Only Deleted Appointments** box. Those marked will show in red.

Report View

Date/Time	Patient	Provider	Location	Procedures	Status
05/22/09 08:30 AM	VANNESSA RAY	Dr Beal	103 Frye Blvd	61	Completed
05/22/09 09:00 AM	DAVID HOULIHAN	Dr Denton	45 Holland St	50	Completed
05/25/09 09:30 AM	ZOLI ERRICO	Dr Beal	103 Frye Blvd	Appointment	Failed

Open selected Appointment
Purge From Database

The right click option allows you to open and edit the selected appointment. You may also purge this marked appointment from the Confirm-IT2 internal database.

View Total: 3

Print Save to file Exit

Figure 9a Open or Purge Selected Marked Appointment(s)

Inactivity Report

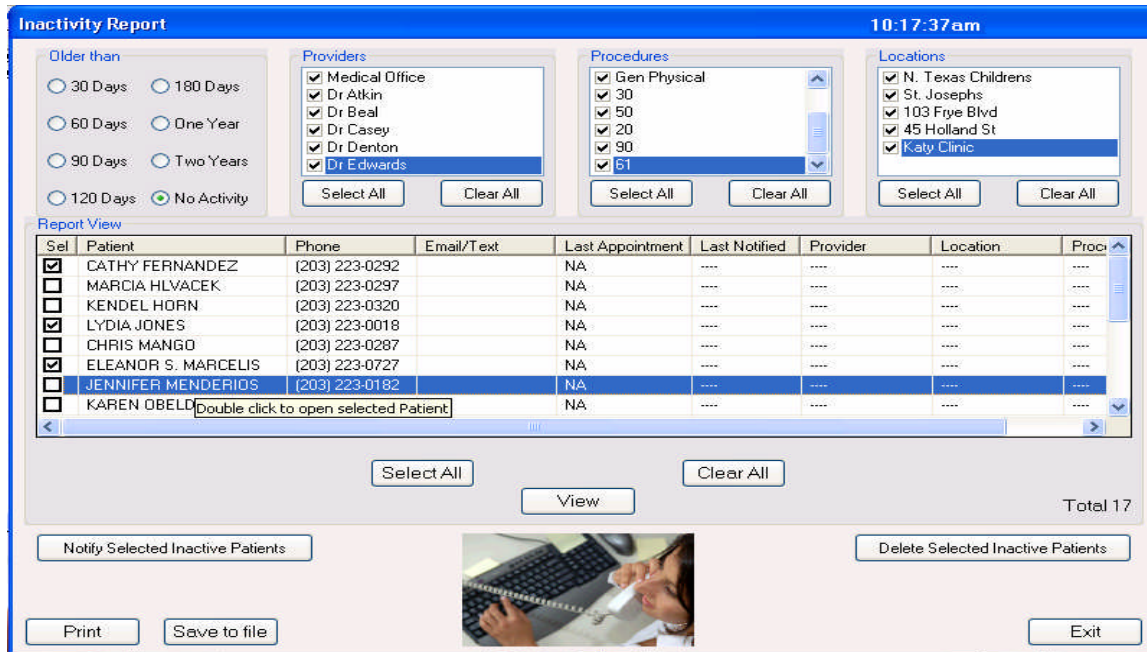


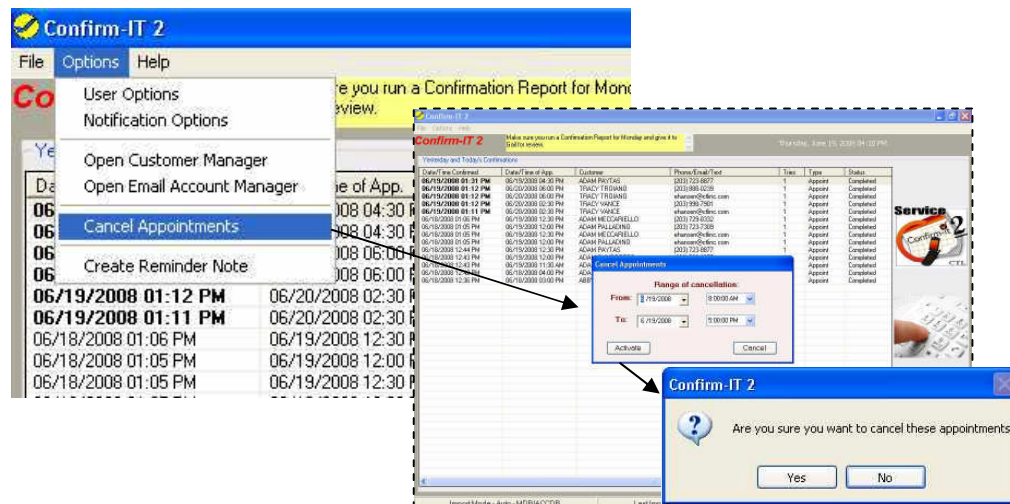
Figure 10 Inactivity Report

This report will provide you with a list of customers who you’ve not seen for the last **30, 60,90,120,180 Days, One or Two Years** . It can also display customers who are in your database but have never been active.

After selecting the time period and viewing the report, you may choose to notify this list of customers by sending the *Inactive Customer* callout message (see **Recording Messages via PC Graphical User Interface GUI or Telephone User Interface (TUI)**)

System Cancel Appointments Within a Date Range

If for some reason the company must cancel scheduled appointments that have been imported into the internal database of Confirm-IT2, appointment cancellation callouts and Emails/Text Messages may be sent for appointments falling within a certain date and time of day range.



Two different types of cancellations can be shown in the main Yesterday and Today's Confirmation screen.

If the recorded **Appointment Reminder** message includes: *"to cancel this appointment, press 2"*, when the called party presses the digit 2, it will show as an **appointment cancelled** by customer.

If the Confirm-IT2 system was instructed to send out appointment cancellation callouts and/or Email/Text messages, those appointment cancellations will show as **cancel completed**. This is true for a date range cancellation by the system or for the individual cancel request explained in the Appointment Report section under **Figure 9**.

Dr. Beal's Appointments Cancelled by Confirm-IT2

Date/Time Confirmed	Date/Time of Appt	Customer	Provider	Phone/Email/Text	Tries	Type	Status
09/04/2008 03:30 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Cancel	Completed
09/04/2008 03:29 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Cancel	Completed
09/04/2008 01:54 PM	09/05/2008 02:30 PM	CARRIE SHEA	Dr Denton	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:53 PM	09/05/2008 02:00 PM	ANITA SHEA	Dr Casey	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 11:00 AM	JIM PREGANO	Dr Edwards	(203) 223-0239	1	Appt Ring	Canceled
09/04/2008 01:51 PM	09/05/2008 10:45 AM	TRACEY STEWART	Dr Denton	(203) 223-0238	1	Appt Ring	Completed
09/04/2008 01:51 PM	09/05/2008 10:45 AM	CATHY TORRICE	----	(203) 221-9792	1	Ntly Now	Completed
09/04/2008 01:50 PM	09/05/2008 10:00 AM	ELIZABETH VECCHIARELLI	Dr Edwards	(203) 223-0212	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	KATHY ZIMINSKY	Dr Denton	(203) 223-0192	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	JENNIFER MCCORMACK	Dr Casey	(203) 223-0182	1	Appt Ring	Completed
09/04/2008 01:48 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Appt Ring	Completed
09/04/2008 01:47 PM	09/05/2008 09:00 AM	JENNIFER MENDERIOS	Dr Edwards	(203) 223-0182	1	Appt Ring	Canceled

Cancelled by customer who pressed cancel digit option.

Reminder Note Pad

A reminder note can be shown in the upper center of the Main Yesterday and Today's Confirmations screen. From the pull down Options 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.

Confirm-IT 2

File Options Help

Co User Options
Notification Options

Ye Open Customer Manager
De Open Email Account Manager

06 Cancel Appointments
06 Create Reminder Note

Create Reminder Note

Make sure you run a Confirmation Report for Monday and give it to Gail for review.

Save Cancel

Confirm-IT 2

File Options Help

Confirm-IT 2 Make sure you run a Confirmation Report Monday and give it to Gail for review

Thursday, September 04, 2008 03:47 PM

Yesterday and Today's Confirmations

Date/Time Confirmed	Date/Time of Appt	Customer	Provider	Phone/Email/Text	Tries	Type	Status
09/04/2008 03:30 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Cancel	Completed
09/04/2008 03:29 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Cancel	Completed
09/04/2008 01:54 PM	09/05/2008 02:30 PM	CARRIE SHEA	Dr Denton	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:53 PM	09/05/2008 02:00 PM	ANITA SHEA	Dr Casey	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 11:00 AM	JIM PREGANO	Dr Edwards	(203) 223-0239	1	Appt Ring	Canceled
09/04/2008 01:51 PM	09/05/2008 10:45 AM	TRACEY STEWART	Dr Denton	(203) 223-0238	1	Appt Ring	Completed
09/04/2008 01:51 PM	09/05/2008 10:45 AM	CATHY TORRICE	----	(203) 221-9792	1	Ntly Now	Completed
09/04/2008 01:50 PM	09/05/2008 10:00 AM	ELIZABETH VECCHIARELLI	Dr Edwards	(203) 223-0212	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	KATHY ZIMINSKY	Dr Denton	(203) 223-0192	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	JENNIFER MCCORMACK	Dr Casey	(203) 223-0182	1	Appt Ring	Completed
09/04/2008 01:48 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Appt Ring	Completed
09/04/2008 01:47 PM	09/05/2008 09:00 AM	JENNIFER MENDERIOS	Dr Edwards	(203) 223-0182	1	Appt Ring	Canceled

Figure 11 Personal Reminder Note Pad For the User

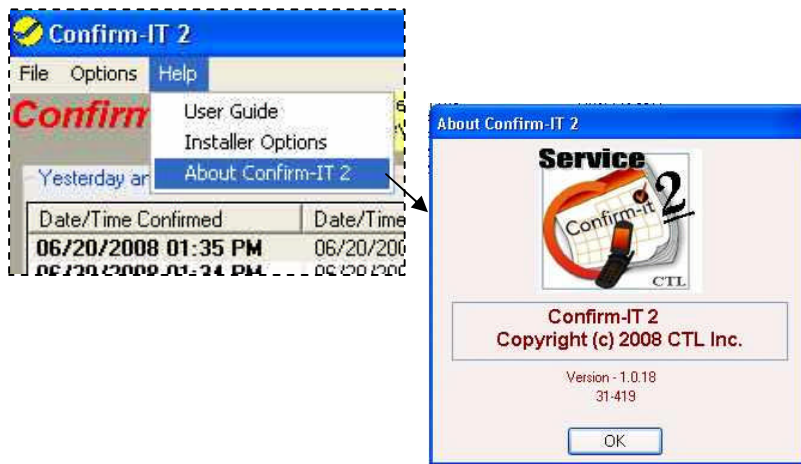
Date/Time Confirmed	Date/Time of Appt	Customer	Provider	Phone/Email/Text	Tries	Type	Status
09/04/2008 03:30 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Cancel	Completed
09/04/2008 03:29 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Cancel	Completed
09/04/2008 01:54 PM	09/05/2008 02:30 PM	CARRIE SHEA	Dr Denton	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:53 PM	09/05/2008 02:00 PM	ANITA SHEA	Dr Casey	(203) 223-0287	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 01:00 PM	JUDY SOUSA	Dr Beal	(203) 223-0279	1	Appt Ring	Completed
09/04/2008 01:52 PM	09/05/2008 11:00 AM	JIM PREGANO	Dr Edwards	(203) 223-0239	1	Appt Ring	Canceled
09/04/2008 01:51 PM	09/05/2008 10:45 AM	TRACEY STEWART	Dr Denton	(203) 223-0238	1	Appt Ring	Completed
09/04/2008 01:51 PM		CATHY TORRICE	----	(203) 221-9792	1	Nfy Now	Completed
09/04/2008 01:50 PM	09/05/2008 10:00 AM	ELIZABETH VECCHIARELLI	Dr Edwards	(203) 223-0212	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	KATHY ZIMINSKY	Dr Denton	(203) 223-0192	1	Appt Ring	Completed
09/04/2008 01:49 PM	09/05/2008 10:00 AM	JENNIFER MCCORMACK	Dr Casey	(203) 223-0182	1	Appt Ring	Completed
09/04/2008 01:48 PM	09/05/2008 09:30 AM	LISA PEMBERTON	Dr Beal	(203) 223-0217	1	Appt Ring	Completed
09/04/2008 01:47 PM	09/05/2008 09:00 AM	JENNIFER MENDERIOS	Dr Edwards	(203) 223-0182	1	Appt Ring	Canceled

To delete the note completely, double click on the note at the top center of the **Yesterday and Today's Confirmations** screen.

Help Menu

The pull down Help menu provides access to:

- **Confirm-IT2 User Guide** - can be viewed from this menu.
- **Installer Options** – A link for the installer to connect to the Advanced programming screens of the Confirm-IT2 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*.
- **About Confirm-IT2** – The information box shows two software version numbers. The top number refers to the **User software** running on this PC. The bottom version number refers to the Linux **Confirm-IT2 Server software** version of the server you are connected to.



NOTE: *If at any time, the bottom version number is not present, it means that there is a problem with the data communication between the User PC and the Server.*

The connection error message Shown below will also appear indicating that the connection has gone away.

After determining the cause of the communication interruption it may be necessary to exit CI2 and then restart it.

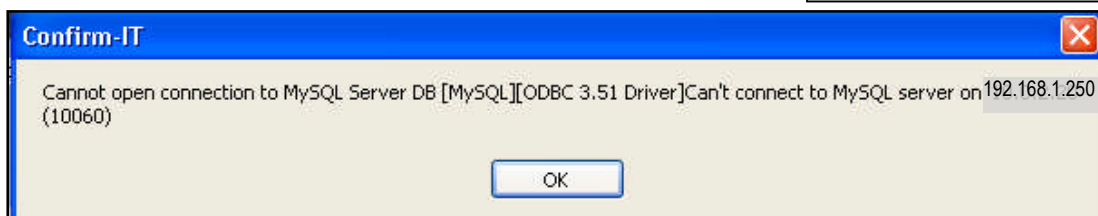


Figure 12 About Confirm-IT2 & Software Version

Exit Confirm-IT2

To exit the Confirm-IT2 application, click the File menu and click Exit. If the Import Mode is set to Auto, the following warning will appear. When Confirm-IT2 is started again, it will remember if it was in the Manual or Auto Import mode.

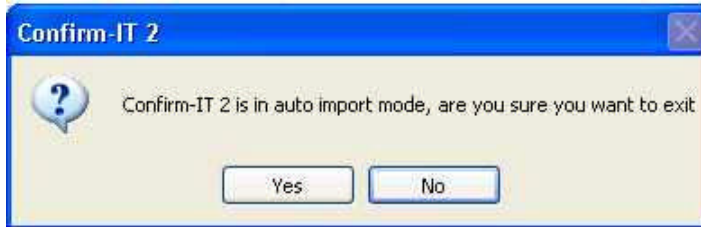


Figure 13 Exit Confirmation From Auto Import Mode

User Options

Confirm-IT2 has two sign in password levels: Administrator and User. The **User Options** screen parameters determine which options the User level sign in password will be allowed to access. Most of the options are allowed for the User level during installation. The Administrator determines which options should be restricted for the User level password. The Administrator password entry will be required for access this menu. **User level attempts will get an error message.**

The User Options allow/deny access list includes:

File Menu Options – *Confirmation Report, Appointment Report, Inactivity Report*

Options Menu – *User Options, Notification Options, Customer Manager, Email Account Manager, Cancel Appointments, Create Reminder Note*

Appointments – *Delete, Cancel and Notify Customer*

Other – *Business Name, Phone Number, Business ID, Appointment Type*

If you are restricted from any of these options and believe that you should have access, contact the Confirm-IT2 system administrator and request that the User level password be allowed access to that option.

Notification Callout Options

Most of the Notification options were entered while running the wizard. Additional options such as number of rings, busy attempts, answering machine detections etc are modified here for each type of callout. Usually, these settings can be left at their default value. Notification types are:

Appointment – - *Reminder call and Email/Text Msg. to customers who have scheduled appointments.*

Cancellation – - *Calls out and plays user recorded Cancellation message and Email/Text Msg. to scheduled customers of provider(s) (staff) if provider is not able to work etc. Provider(s), times /date range and activation are set in **Calendar/Cancel Appointments** menu. This may also be activated remotely on a **Provider ID** basis via the **Telephone User Interface (TUI)**.*

Birthday - - - *Call and Email/Text Msg. to customers that have birthday date entries in their profile and have the **Birthday Phone Reminder** check box enabled and plays the generic user recorded **Birthday** message..*

Close (customer) – *Call and Email/Text Msg. to all scheduled customers. Plays the user recorded **Business Close** message. The callouts are activated via the **TUI** for today or tomorrow’s appointments.*

Close (provider) – *Call and Email/Text Msg. to the business staff whose information was entered in the provider manager Menu and plays the user recorded **Business Close Provider** message.*

Inactivity – *Call and Email/Text Msg. all inactive customers specified in the **Inactivity Report** and plays the user recorded **Inactive Customer** message. Follows parameters & activation of report menu.*

Notify Now – *Immediately sends Call and Email/Text Msg. of the company’s recorded notification message advising that a service is available now.*

Reschedule Reminder – *Automatic date triggered “Tickler” Call and Email/Text Msg. friendly reminder to advise customer to call in to schedule their next appointment.*

Notification Options

Options

Appointment

General | Record/Upload Options | Email | Text To Speech

Rules

Start Time: 8:00:00 AM | End Time: 5:00:00 PM

Days Before Appointment: 1

Adjust for off Days/Holidays:

* Appointment Confirmation Feature:

* Transfer Feature: Transfer Number: _____

Busy Retry Attempts: 5

RNA Retry Attempts: 3

Wait before Busy Retry (minutes): 2

Wait before RNA Retry (minutes): 30

Answering Machine

Enable Detection: Leave message if Detected:

Retry Call if Detected: Repeat Message: 3

Listen to Recordings

Hear Recording (1)

Hear Recording (2)

Hear Answer Machine Recording (1)

Hear Answer Machine Recording (2)

Hear Confirm Recording

Hear Cancel Recording

* MUST RECORD APPROPRIATE PROMPTS.

Save | Cancel

Figure 14 Typical Notification Option

To avoid making reminder calls on holidays the **Adjust for Off Days/Holidays** feature forces Confirm-IT to look ahead to see if tomorrow is a holiday or business off day. It will force the system to make those reminder calls now, prior to those days. Example – Christmas is on Thursday **and** Friday is a work day. Reminder calls for Friday will go out on Wednesday the day before Christmas.

Options

Start Time – System wide time of day that callouts for the selected callout type will start.

End Time – System wide time of day that callouts for the selected callout type will no longer be allowed.

NOTE: Start & End Times can be overridden per customer in the Customer Manager window

Days Before Appointment – The number of days prior to the actual appointment to send reminders.

Appointment Confirmation Feature – Check this box if you want to instruct the called party to verify that they heard and accepted their appointment reminder voice message by pressing the digit 1. If the called party wishes to cancel the appointment, they may press the digit 2 on their telephone dial pad.

NOTE: The 2 part Appointment Reminder Message **MUST BE RECORDED** to use this option.

Transfer Feature – Used only when Confirm-IT server is connected to a single line interface of a phone system that provides a hook flash transfer to the extension specified in the **Transfer Number** field.

Busy Retry Attempts – If a line busy is received, this sets the number of times a callout is tried for the selected callout type before it is considered unsuccessful and stops calling this customer.

RNA Attempts – If a ring no answer (RNA) condition exists for the callout, this value sets the number of tries made for the selected callout type before being considered unsuccessful and stops calling.

Wait before Busy Retry – The number of minutes to wait before re-trying a previously busy callout.

Wait before RNA Retry – The number of minutes to wait before re-trying a previous Ring No Answer.

Answering Machine

Enable Detection – When the callout is answered, apply logic to determine if it was an answer machine.

Leave message If Detected – If answer machine is detected, play the **Answering Machine Message** and consider the call successful.

NOTE: The Answering Machine Message **MUST BE RECORDED** to use this option.

Retry Call If Detected – If an answering machine is detected, play the **Answering Machine Message** and then call back a second time for an attempt to get a live person. Only 1 message is left on machine.

Repeat Message – The number of times the **Answering Machine Message** is repeated to make sure the whole message in its entirety is recorded by and stored on the customer's answering machine.

Text to Speech (Optional Feature)

Enable TTS – Activates text to speech if that option was purchased.

Auto Text Selection – The text fields in brackets contain imported or entered system stored information that can be inserted as smart text into TTS or Email content.

Email/Text Message – Enter Subject, and Body text for Email and Text Message content.

Using the Message Record Graphical User Interface

As previously discussed in the Callout Options, Confirm-IT can do more than just remind customers of their scheduled appointment by calling and playing a reminder message and / or sending cellular text messages and Email.

Confirm-IT can also:

1. Notify customers their appointment is cancelled due to a personnel problem.
2. Notify customers and employees of business closure due to weather etc.
3. Send a Notify Now message on demand.
4. Send a Reschedule reminder message.
5. Send a birthday message (with special offer) to customers.
6. Send a “we miss you” message to customers not seen in a while.

In order to use the basic appointment reminder and the other features listed above, a voice message must be recorded by the administrator for each message type. These voice messages are recorded using Confirm-IT’s recording Graphical User Interface (GUI) with the PC’s sound card, microphone and speakers or using a conventional telephone line to access the Telephone User Interface (TUI). After calling in and connecting to the Confirm-IT TUI, a prompt menu will provide dial pad digit choices and guide you through the different voice recording steps.

Recording Notification Voice Messages Using the GUI

When the Confirm-IT user software is installed on a PC that has a sound card, the outgoing reminder notification messages may be recorded using a microphone. It is recommended that a high quality analog or USB type microphone be used. The recording GUI is accessed by selecting *Notification Options* from the **Options** menu.

The screenshot displays the 'Notification Options' window with the 'Appointment' notification type selected. A red arrow points to the 'Appointment' tab, which is labeled 'Currently Selected Notification Type'. The 'General' tab is active, showing settings for 'Rules' (Start Time: 8:00:00 AM, End Time: 5:00:00 PM), 'Days Before Appointment' (1), 'Adjust for off Days/Holidays' (checked), 'Appointment Confirmation Feature' (unchecked), 'Transfer Feature' (unchecked), 'Busy Retry Attempts' (5), 'RNA Retry Attempts' (3), 'Wait before Busy Retry (minutes)' (2), and 'Wait before RNA Retry (minutes)' (30). The 'Answering Machine' section includes 'Enable Detection' (checked), 'Leave message If Detected' (checked), 'Repeat Message' (3), and 'Retry Call If Detected' (unchecked). On the right, the 'Listen to Recordings' section contains buttons for 'Hear Recording (1)', 'Hear Recording (2)', 'Hear Answer Machine Recording (1)', 'Hear Answer Machine Recording (2)', 'Hear Confirm Recording', and 'Hear Cancel Recording'. A red asterisk note at the bottom states '* MUST RECORD APPROPRIATE PROMPTS.' Below the note are 'Save' and 'Cancel' buttons.

Figure 16 Appointment Options Message Playback Screen

The four **Tabs** labeled **General**, **Record/Upload Options**, **Email** and **Text to Speech** appear for each of the Notification Options when selected from the drop down Options box. Recording procedures are identical for each of the notification types although some types require single part recording and others require two parts. Message examples for each recording are provided as a guideline. We will go through the procedure for creating or importing Appointment option recordings. Once you understand how to record, play back and save these recordings, you can repeat the procedure for each of the other Notification Option types.

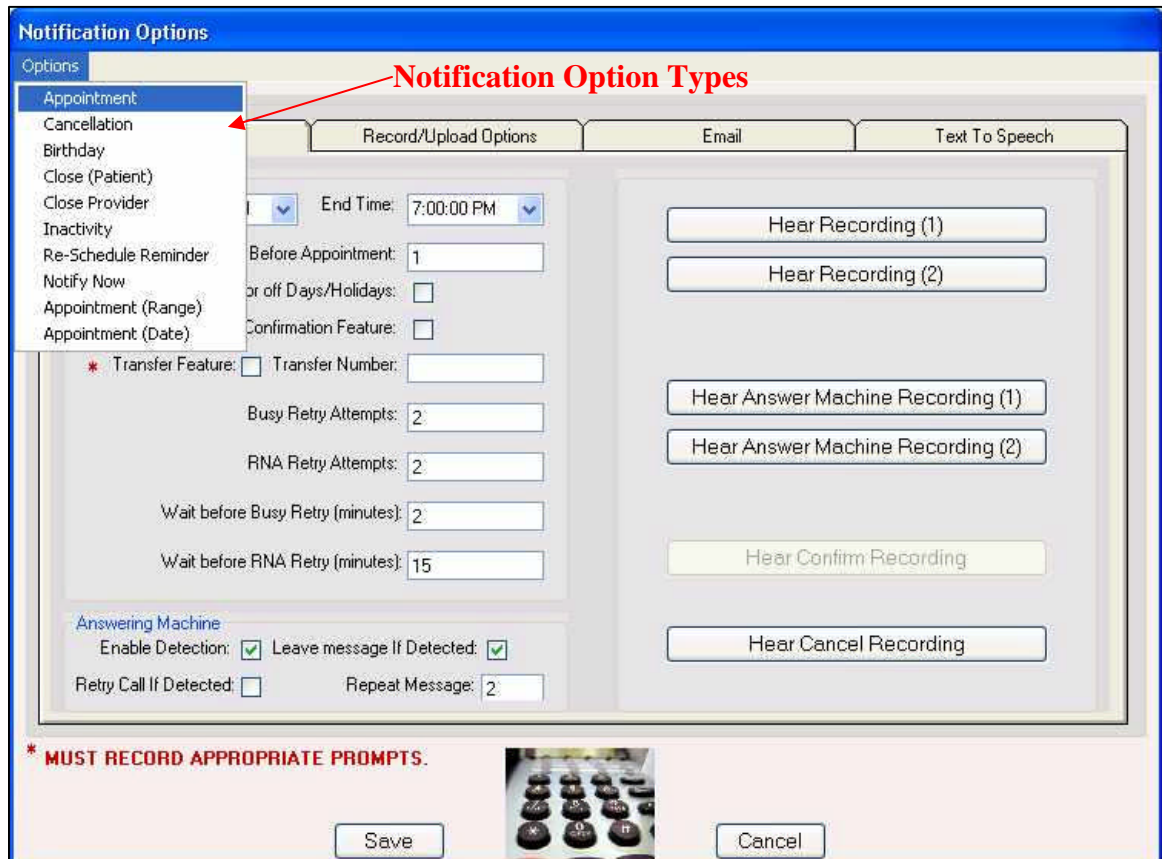


Figure 17 Notification Option Types Pull Down Menu

Some of the Notification Types require two part messages. The wording for the **second part will vary** depending on if the **Appointment Confirm Feature**, **Appointment Cancel** or **Transfer Feature** to phone system extension by dialing “0” options have been enabled in the **Callout Options** screen or if you offer the **Cancel Appointment** option (see **Figure 17**).

Example: “**To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. To transfer to our appointment coordinator press 0, otherwise we look forward to seeing you.**”

Wording examples for the different combinations of these dial options are shown in the Record/Upload Options TAB screen for each Notification Option Type. As will be shown in the example Answer Machine Message wording, these options should not be offered since it is not a live connection to the called party.

This example is the Appointment Message which has two parts [Save Recording (1)] and [Save Recording (2)]. The Answer Machine Recording also has 2 parts.

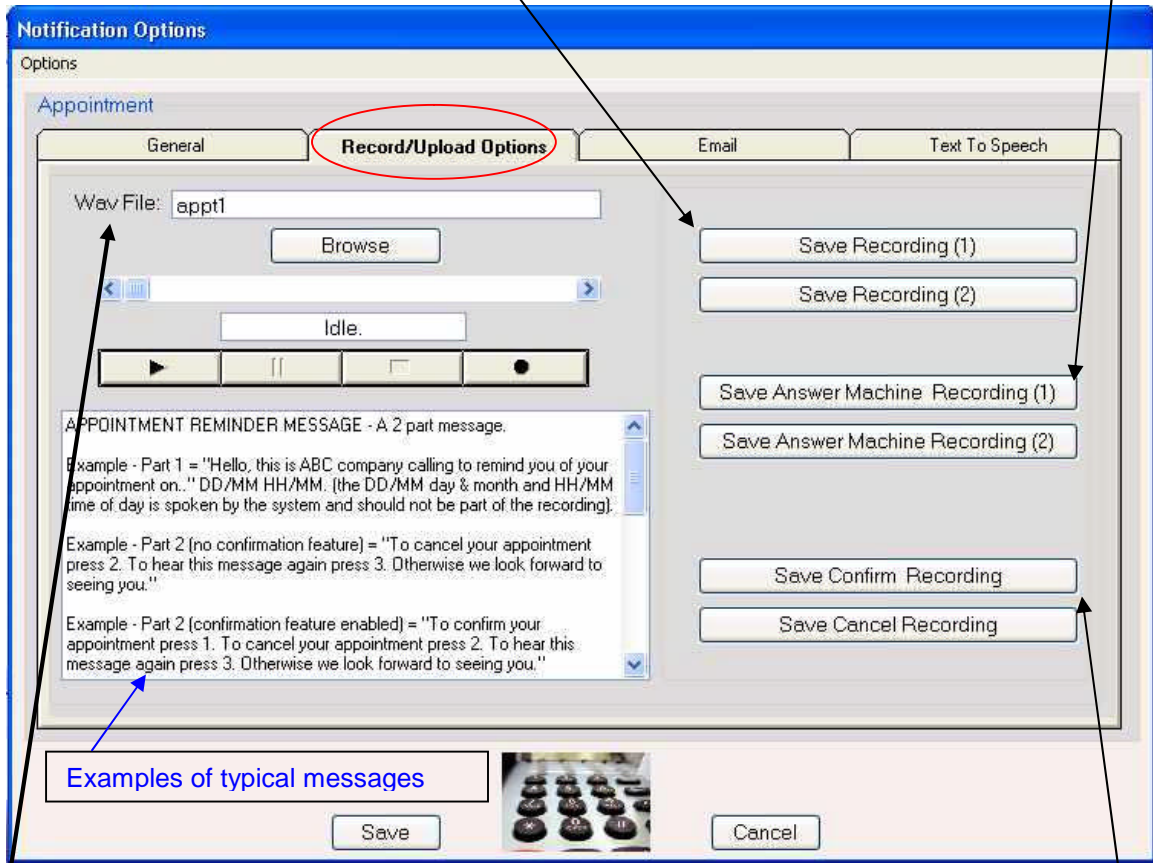


Figure 18 Record/Upload Options TAB Screen

In the **Wav File** entry window you must type a temporary file name. Alternately, you may type a path and name to save the recording there for future use.
 Example - **C:\messages\lappt1.wav**
 You may also click the Browse button to search for an existing WAV file to use as one of the recordings.

If the Confirm Appointment (*dial digit 1*) and/or the Cancel Appointment (*dial digit 2*) options are enabled, these recorded messages will play after the associated option digit is dialed by the called party. They are typically just closing comments such as:
 "Your appointment has been confirmed and we look forward to seeing you."
 or
 "You have cancelled your appointment. Please call 555-1212 to reschedule."



TO RECORD

After entering a file name, click anywhere on the screen to activate the Play/Pause/Stop/Record control bar. Click the **Record** button to begin recording into the microphone. When finished, press the **Stop** button.

IMPORTANT NOTE!! If you selected an existing Wav File using the Browse button, you will record over that existing file!

TO PLAY

Click the Play button to hear the recorded message through the PC speakers.

TO SAVE

Click the appropriate Save Recording button on the right side of the screen. A **red asterisk** will appear to the left of the save button and the button will be dimmed to indicate the message was saved. This only saves the recording as a temporary local file.

The recording is not permanently uploaded and saved to the Confirm-IT server until the lower left Save button is clicked on one of the options screens. You can move between Tabs and select other Options types and a message box will remind you that the upload save to the server has not been done.

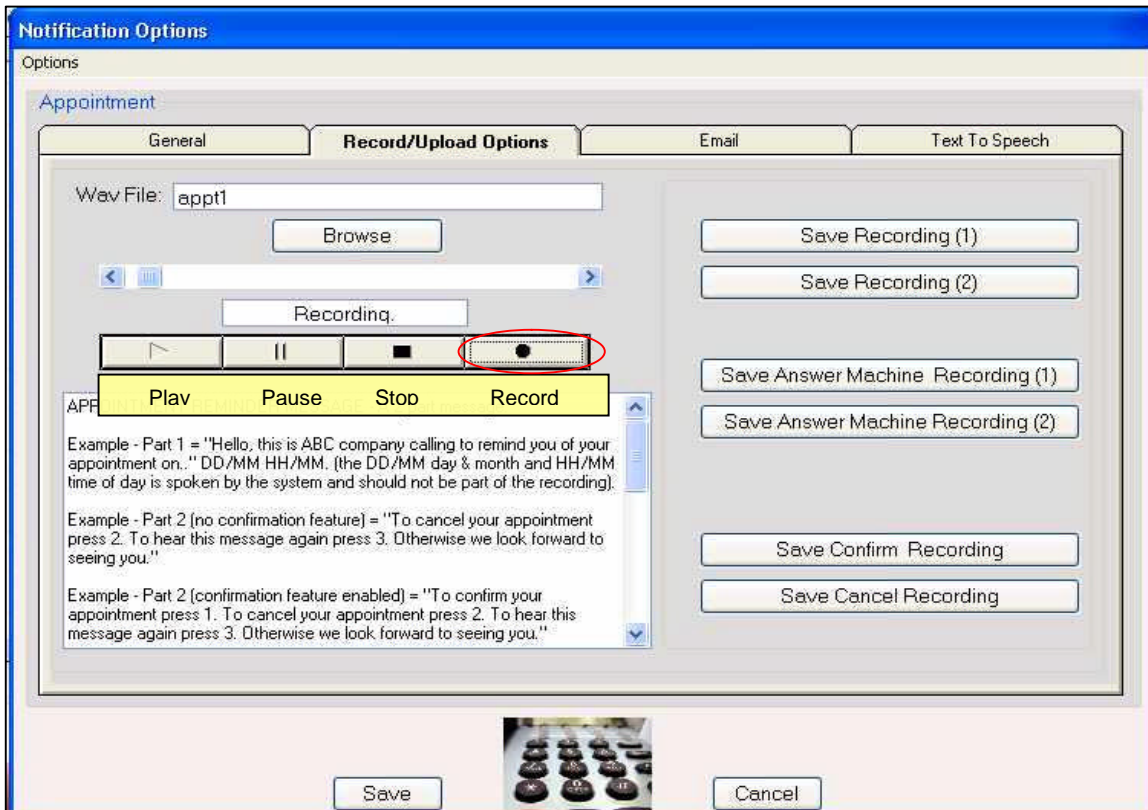
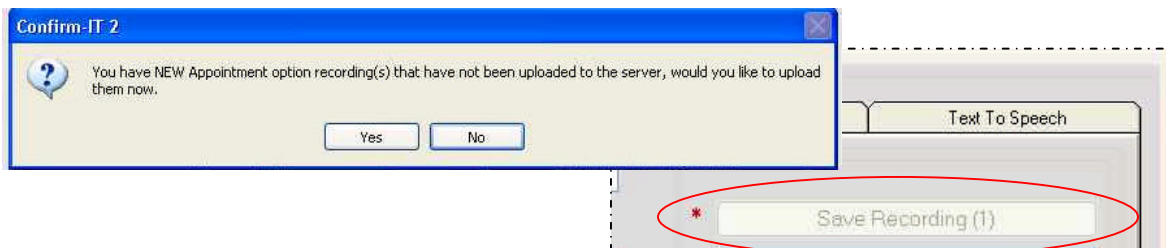


Figure 19 Using the Record Button to Record a Message



The **General** TAB allows you to play back existing recordings that have already been uploaded and saved to the Confirm-IT server. This is the actual message that will be heard by the person receiving the recorded message.

If the recording does not exist for the selected Notification Option, the **Hear Recording** key will be dimmed.

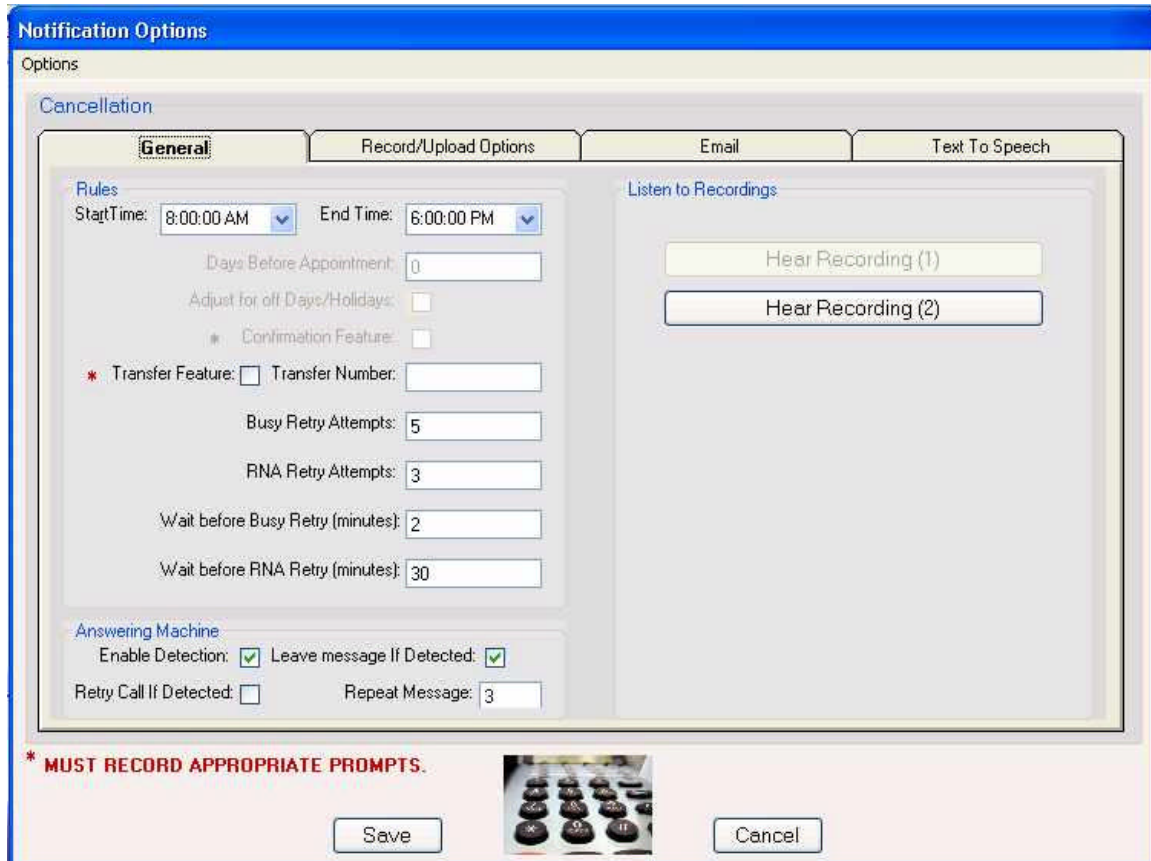


Figure 20 Listen to Messages Stored in the Server

IMPORTANT NOTE: If no message has been recorded for a certain Notification Option and a notification callout for that call type is made, the default system message will be played to the called party!

Example: The Reschedule Reminder Message has been enabled in the Advanced Tab of a customer’s profile. If no reschedule reminder greeting message has been recorded in the Notification Options, the called party will hear *“The reschedule reminder message has not been recorded.”*

Customer / Patient Manager

The Customer Manager section allows you to search and select a particular customer's contact information within the Confirm-IT2 internal database. In the Customer Manager you can display or modify a customer or patient's appointment reminder profile settings.

Searching For a Patient Appointment Profile

Open the Customer Manager screen by selecting Customer Manager from the pull down **Options** menu.

The screenshot shows the Patient Manager interface with the following details:

- Form Fields:**
 - * First Name: ELIZABETH
 - * Last Name: VECCHIARELLI
 - Address: 113 GUERNSEY TOWN
 - City: Danbury
 - State: CT
 - Zip: 02798
 - Phone #: (203) 223-0212
 - Alt. Phone #:
 - Email Address:
 - Text Message:
- Reminder Settings:**
 - Reminder (checked) for Phone #
 - Reminder (unchecked) for Alt. Phone #
 - Reminder (unchecked) for Email Address
 - Reminder (unchecked) for Text Message
- Patient Notes:** Will need wheel chair until 9/3/09
- Table:**

Delete	First Name	Last Name	Address	City	State
<input type="checkbox"/>	ELIZABETH	VECCHIAR...	113 GUER...	Danbury	CT
<input type="checkbox"/>	ANNA	VENTURA			
<input type="checkbox"/>	KATHY	ZIMINSKY			

Annotations in the image:

- A red dashed box highlights the Patient Notes field.
- A red arrow points from a text box to the Reminder checkboxes.
- A text box states: "Miscellaneous details about each customer may be entered here." pointing to the Patient Notes field.
- A red-bordered box contains the text: "The Reminder box for any imported fields will automatically be checked. You can add additional information that is not present in the imported **appointment database file**."

Figure 21 Patient Manager Screen

To locate a specific patient, you can perform a search by entering some known information about that person. By entering a phone number or the first few letters of the last name and then clicking the Search button, Confirm-IT2 will find all matching records. If multiple matches are found for the information you entered, a secondary screen will appear with a list of the matching patient records.

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.

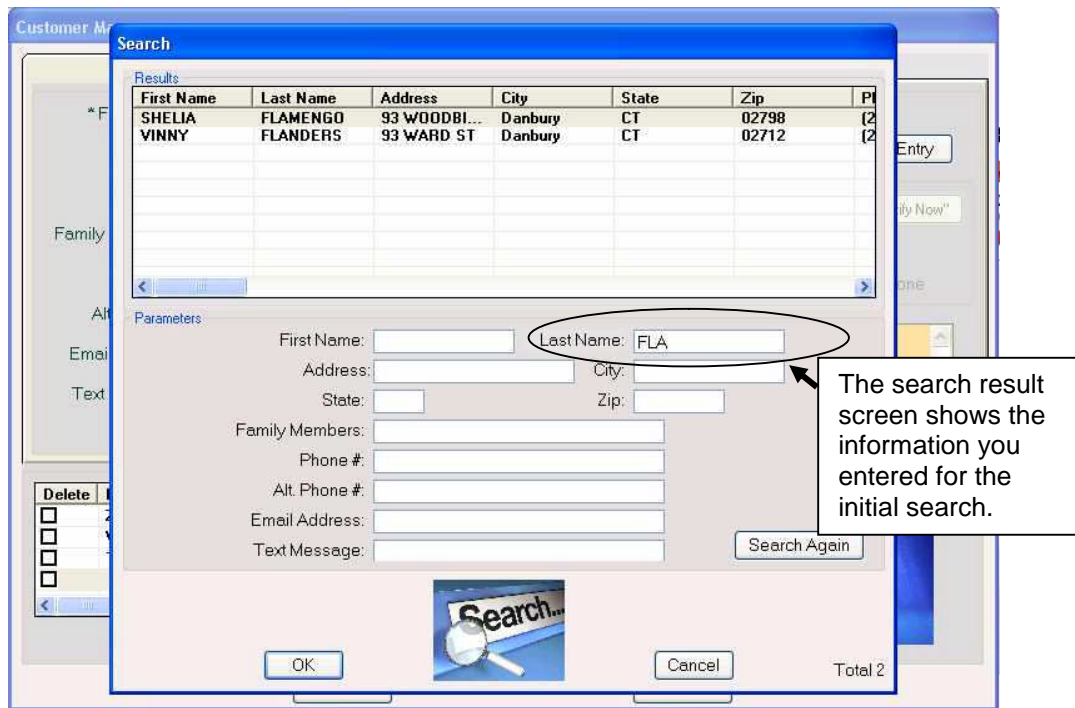


Figure 22 Search Results – Search Again

If the name of the person you were searching for appears in the Search **Results** list, you may either double click on that line or highlight the line and click the **OK** button. If none of the Results displayed are the one you are searching for or if a large number of records are displayed, you may narrow the search by entering additional key information. To repeat the search click on the **Search Again** button.

Customer Manager Advanced Tab Screen

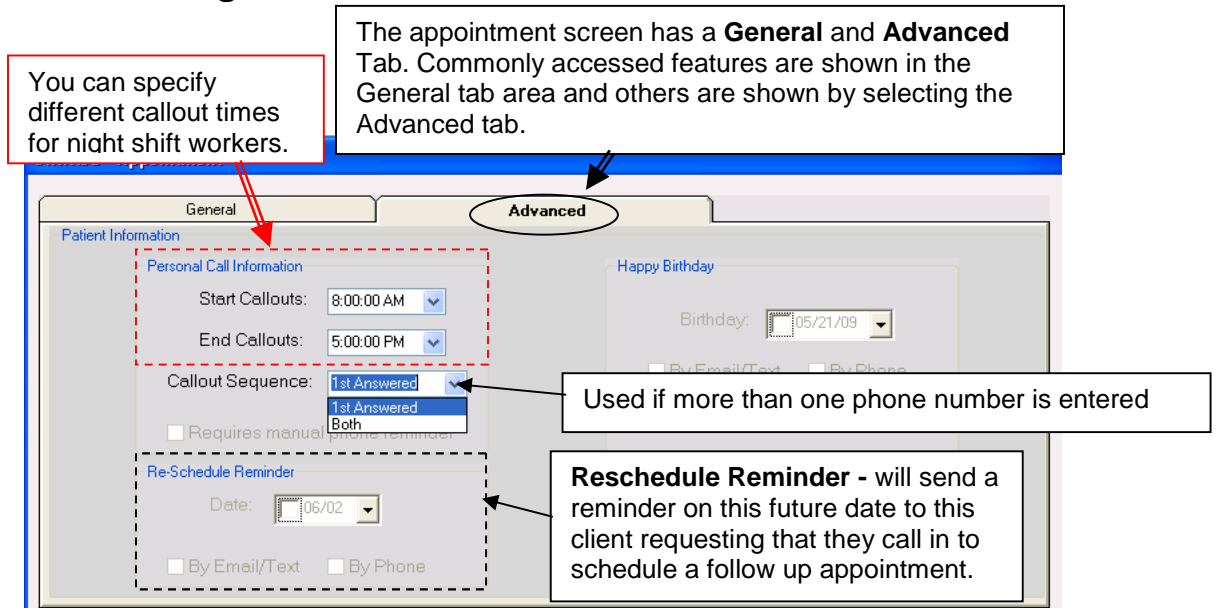


Figure 23 Customer Manager Advanced Tab Options

Notify Now

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

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

If Confirm-IT2 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 – The single special “Notify Now” company prompt must be recorded using the PC Message Recording Graphical User Interface with a microphone or using 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”

The screenshot shows the 'Customer Manager' software interface. The 'General' tab is active, displaying fields for customer information: First Name (SHELIA), Last Name (FLAMENGO), Address (93 WOODBINE STREET), City (Danbury), State (CT), and Zip (02798). There are also fields for Family Members, Phone #, Alt. Phone #, Email Address, and Text Message, each with a 'Reminder' checkbox. The 'Advanced' tab is also visible, showing 'Enable "Notify Now"' and 'Cancel "Notify Now"' buttons, and checkboxes for 'By Email/Text' and 'By Phone'. A 'Customer Notes' field contains the text 'Shelia is allergic to aspirin.' A dashed box highlights the 'By Email/Text' checkbox, and an arrow points from a text box to it.

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

- **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 for the “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

Adding a Customer's Mobile Text Message Address

Customer Manager

General | Advanced

* First Name: SHELIA * Last Name: FLAMENGO

Address: 93 WOODBINE STREET City: Danbury

State: CT Zip: 02798

Family Members: []

Phone #: (203) 223-2138 Reminder

Alt. Phone #: [] Reminder

Email Address: sheflame@aol.com Reminder

Text Message: Double click for Text Messaging Wizard Reminder

Text Messaging Wizard

Enter 10 digit Cell Phone Number: 203-223-2138

Select Cell Provider:

- Alltel
- ATT Wireless
- Bell Mobility
- Boost Mobile
- Century Tel
- Cingular (1)
- Cingular (2)
- Fido/Microcell
- Metrocall
- Nextel
- Rogers
- Sprint PCS
- Telus Mobility
- T-Mobile
- Verizon
- Virgin Mobile USA

*All Company names above are the property of their respective owners and the address strings provided are for programming assistance only. CTL claims no responsibility if the strings are changed.

Customer List:

Delete	First Name	Last Name	Address	City
<input type="checkbox"/>	MARY	FLAHERTY	WOODBI...	Danbury

Customer Manager - Detailed View

* First Name: SHELIA * Last Name: FLAMENGO

Address: 93 WOODBINE STREET City: Danbury

State: CT Zip: 02798

Phone #: (203) 223-2138 Reminder

Alt. Phone #: [] Reminder

Email Address: sheflame@aol.com Reminder

Text Message: 2032232138@mmode.com Reminder

Customer List:

Delete	First Name	Last Name	Address	City	State
<input type="checkbox"/>	STEVE	FLAHERTY	930 WOOD...	Danbury	CT
<input type="checkbox"/>	SHELIA	FLAMENGO	93 WOODBI...	Danbury	CT
<input type="checkbox"/>	LISA	FLAMMIA			
<input type="checkbox"/>	MICHELLE	FLAMMIA			

Annotations:

- A red arrow points from the "Text Message" field in the main form to the "Text Messaging Wizard" dialog box.
- A red circle highlights the "Enter 10 digit Cell Phone Number" field in the wizard.
- A blue circle highlights the "ATT Wireless" radio button in the wizard.
- A dashed blue circle highlights the "Convert to address" button in the wizard.
- A green box highlights the "Text Message" field in the main form after the wizard is closed.
- A green arrow points from the "Convert to address" button to the "Text Message" field.

Text Boxes:

- A mobile phone text message address can be automatically calculated in the Text Message Address field.
- If you move the mouse pointer over the Text Message 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 Text Message Address field.
- Click the Text Message Reminder box.

Figure 25 Adding a Cell Phone Text Message Address

Creating A Manual Confirm-IT2 Appointment

There may be times when you want to send a Notify Now reminder message or possibly make a private appointment for someone who has never been imported from your scheduling database. This person can be manually entered into the Confirm-IT2 internal database by selecting **Create Appointment** from the pull down Option menu.

The screenshot shows the 'Untitled - Appointment' form with two tabs: 'General' and 'Advanced'. The 'General' tab is active and contains the following fields:

- Patient Information:**
 - * First Name: Nick
 - * Last Name: GRONENTHAL
 - Address: 88 BEEBE ST
 - City: Danbury
 - State: CT
 - Zip: 02779
 - Family Members: (empty)
 - Distribution List: (checkbox)
 - Phone #: (203) 221-2929
 - Alt. Phone #: (empty)
 - Email Address: (empty)
 - Text Message: (empty)
- Appointment Information:**
 - Procedures: Appointment
 - Start time: 6 / 2 / 2009, 10:00:00 AM
 - Provider: Medical Office
 - End time: 6 / 2 / 2009, 10:30:00 AM
 - Location: N. Texas Childrens

Buttons include 'Search', 'Clear Entry', 'Enable "Notify Now"', 'Cancel "Notify Now"', 'By Email/Text', 'By Phone', 'View Future', 'Save', and 'Cancel'. A patient note reads: 'Nick has difficulty swallowing pills.'

Drop-down selection lists

- Medical Office
- Medical Office
- Dr Atkin
- Dr Beal
- Dr Casey
- Dr Denton
- Dr Edwards

- Medical Office
- Medical Office
- Dr Atkin
- Dr Beal
- Dr Casey
- Dr Denton
- Dr Edwards

- Appointment
- Appointment Range
- Appointment Date
- Gen Physical
- 30
- 50
- 20

This screenshot shows the 'Advanced' tab of the 'Untitled - Appointment' form. The 'Personal Call Information' section includes:

- Start Callouts: 8:00:00 AM
- End Callouts: 5:00:00 PM
- Callout Sequence: 1st Answered

The 'Callout Sequence' dropdown menu is open, showing options: '1st Answered', '1st Answered', and 'Both'. A text box points to this menu with the text: 'Used if more than one phone number is entered'. The 'Happy Birthday' section shows a Birthday field set to 05/21/09.

Figure 25a Create Manual Appointment Screen

Dial Menu for Recording Notification Voice Messages

All necessary callout messages should have been recorded during the initial installation of the Confirm-IT2 system.

The following information is included for understanding how Confirm-IT2 works.

If any changes are required to the voice message recordings, you should contact your system administrator or the system installer.

Voice announcements to be played to the customer **MUST BE RECORDED** prior to enabling the various notifications. This procedure was covered in the **“Using The PC GUI To Recording Notification Voice Messages”** and also in the following **“Recording Messages via Telephone User Interface (TUI)”** section of this manual.

- **Voice Announcement Recordings (via telephone user interface) For:**
 - Appointment Reminder
 - Appointment Cancellation
 - Birthday Message
 - Business Closed Message
 - Inactive Customer Message
 - Confirmed Response Message (option)
 - Cancelled Response Message (option)
 - Answering Machine Announcement
 - Reschedule Reminder
 - Notify Now

As previously discussed in the Callout Options, Confirm-IT2 can do more than just remind customers of their scheduled appointment by calling and playing a reminder message and/or sending cellular text messages and Email.

Confirm-IT2 can:

7. Notify customers that their appointment is cancelled due to a personnel problem.
8. Notify all customers of business closure due to weather etc.
9. Send a reminder for a client to call in to schedule a follow-up appointment.
10. Send a birthday message (with special offer) to customers.
11. Send a “we miss you” message to customers that you have not seen for a while.

In order to use the basic appointment reminder and the other features listed above, a voice message must be recorded by the administrator for each of the message types listed above. These voice messages are recorded using a conventional telephone line to access the **Telephone User Interface (TUI)**. After calling in and connecting to the Confirm-IT2 TUI, a prompt menu will provide dial pad digit selectable choices and guide you through the different voice recording steps.

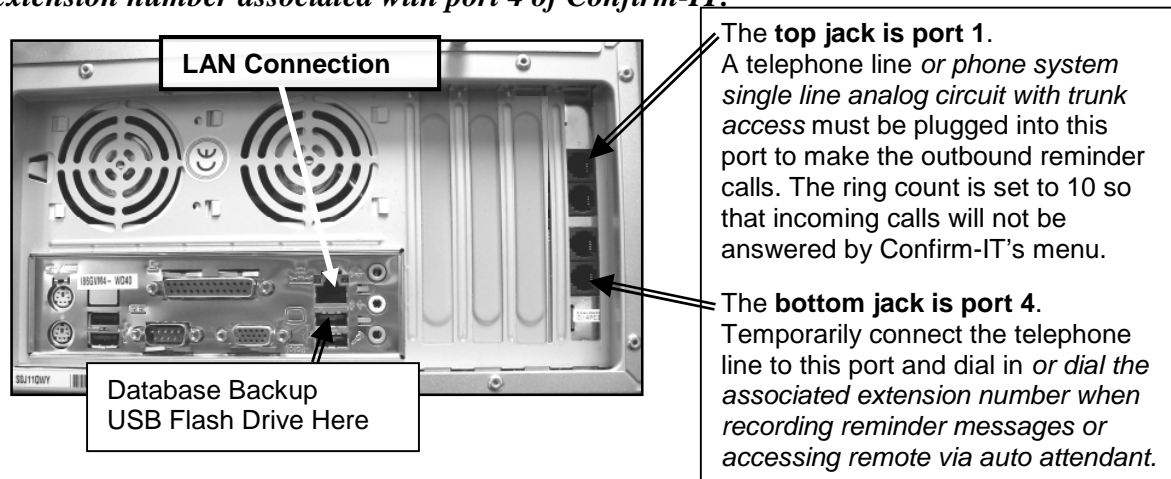
Recording Messages via Telephone User Interface (TUI)

ANY MODIFICATIONS TO THE CONFIRM-IT2 SERVER PC SHOULD ONLY BE DONE BY AUTHORIZED INSTALLATION PERSONNEL .

This information is included for informational purposes only.

To access the TUI, you must call into one of the Confirm-IT2 telephone interface card ports. In the basic system, there are 4 ports with modular jack connectors located on the back of the Confirm-IT2 server computer.

Port 4 (bottom connector) has been factory programmed to answer after 2 rings and connect to the reminder message administration menu. To record the reminder messages, the telephone company line circuit should be connected to port 4 (bottom connector). *If you are connecting the server to an existing phone system's single line ports, dial the extension number associated with port 4 of Confirm-IT.*



From a phone, call into the Confirm-IT2 server port 4 by dialing the phone number associated with that line. After 2 rings, the call will be answered and you will hear the Confirm-IT2 welcome prompt asking for your password and then press pound (#). **The factory set password is 2663476.** (spells "CONFIRM" on dial pad)

A menu of different message types will be heard. Depending on the message type, it will require either a one or two part recording. The recording option menu will allow you to listen to each part individually. When both parts of a 2 part message have been recorded, both parts can be played together to hear what the actual whole message sounds like. You can review and re-record over existing messages

The messages that need to be recorded are:

- Appointment Reminder** – There can be 3 types of appointment reminder messages *Reminder Message, Date Appointment Message* and *Time Range Appointment Message*. Each type is a **2 part message**. The **first part** identifies the business name with the date and time of the appointment. The wording for the **second part will vary** depending on if the *Appointment Confirm Feature* or *Transfer*

Feature to phone system extension by dialing “0” options have been enabled in the **Callout Options** screen or if you offer the **Cancel Appointment** option. (see [Figure 17](#))

The Confirm-IT2 Telephone User Interface Tree in [Figure 24](#) is a graphical illustration showing how to navigate through the message recording process.

◆ **Appointment Reminder Call Answered Message**

A two part message:

Example – Part 1 = “**Hello, this is ABC company calling to remind you of your appointment on..**” *DD/MM HH/MM*. (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).

Example- Part 2 (no confirmation feature) = “**To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (confirmation feature enabled) = “**To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (confirmation but no cancel option choice) = “**To confirm your appointment press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”

◆ **Confirm Response– A one part message:**

Example – “**Thank you, your appointment has been confirmed.**”

◆ **Cancel Response – A one part message:**

Example – “**Your appointment has been cancelled. Please call us at 555-1212 to reschedule.**”

◆ **Answering Machine – A two part message:**

Example – Part 1 = ““**Hello, this is ABC company calling to remind you of your appointment on..**” *DD/MM HH/MM*.” (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).

Example – Part 2 = “**If you need to cancel or change this appointment, call us at 555-1212.**”

□ **DATE APPOINTMENT Call Answered MESSAGE**

A two part message:

Example – Part 1 = “**Hello, this is ABC company calling to remind you of your appointment on..**” *DD/MM*. (the DD/MM day & month is spoken by the system and should not be part of the recording).

Example- Part 2 (*no confirmation feature*) = “**To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation feature enabled*) = “**To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation but no cancel option choice*) = “**To confirm your appointment press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”

- ◆ **Confirm Response**– A one part message:

Example – “**Thank you, your appointment has been confirmed.**”

- ◆ **Cancel Response** – A one part message:

Example – “**Your appointment has been cancelled. Please call us at 555-1212 to reschedule.**”

- ◆ **Answering Machine** – A two part message:

Example – Part 1 = “**“Hello, this is ABC company calling to remind you of your appointment on..” DD/MM HH/MM.**” (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).

Example – Part 2 = “**If you need to cancel or change this appointment, call us at 555-1212.**”

□ **TIME RANGE APPOINTMENT MESSAGE**

A two part message:

Example – Part 1 = “**“Hello, this is ABC company calling to remind you of your appointment on..” DD/MM from HH/MM to HH/MM.**” (the DD/MM day & month and HH/MM to HH/MM time of day is spoken by the system and should not be part of the recording).

Example- Part 2 (*no confirmation feature*) = “**To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation feature enabled*) = “**To confirm your appointment press 1. To cancel your appointment press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”

Example – Part 2 (*confirmation but no cancel option choice*) = “**To confirm your appointment press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”

- ◆ **Confirm Response**– A one part message:

Example – “**Thank you, your appointment has been confirmed.**”

- ◆ **Cancel Response** – A one part message:
Example – “**Your appointment has been cancelled. Please call us at 555-1212 to reschedule.**”
- ◆ **Answering Machine** – A two part message:
Example – Part 1 = “**Hello, this is ABC company calling to remind you of your appointment on..**” *DD/MM HH/MM.*” (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).
Example – Part 2 = “**If you need to cancel or change this appointment, call us at 555-1212.**”
- **APPOINTMENT CANCELLATION** – A two part message:
Example – Part 1 = “**Hello, this is ABC company calling. Due to an appointment conflict, we are forced to cancel your existing appointment on..**” *DD/MM HH/MM.* (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).
Example – Part 2 = “**To reschedule your appointment please contact us at 555-1212.**”
- **NOTIFY NOW CALL ANSWERED MESSAGE**
A two part message:
Example – Part 1 = “**Hello, this is ABC company calling to remind you that you may pick up your pet before 5 PM today.**”
Example- Part 2 (*no confirmation feature*) = “**If are not able to pick up your pet today, press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”
Example – Part 2 (*confirmation feature enabled*) = “**If you will be picking up your pet today, press 1. If are not able to pick up your pet today, press 2. To hear this message again press 3. Otherwise we look forward to seeing you.**”
Example – Part 2 (*confirmation but no cancel option choice*) = “**If you will be picking up your pet today, press 1. To hear this message again press 3. To reschedule your appointment, call us at 555-1212, otherwise we look forward to seeing you.**”
- ◆ **Confirm Response**– A one part message:
Example – “**Thank you. We look forward to seeing you before 5 PM today**”
- ◆ **Cancel Response** – A one part message:
Example – “**Please call our office at 555-1212 to let us know when you plan to pick up your pet.**”
- ◆ **Answering Machine** – A two part message:
Example – Part 1 = “**Hello, this is ABC company calling to remind you that you may pick up your pet before 5 PM today.**”

Example – Part 2 = “If you have any questions, please call us at 555-1212.”

- ❑ **RESCHEDULE REMINDER MESSAGE** – A one part message:
Example – “Hello, this is ABC company calling to remind you that your pet is due for checkup. Please call 555-1212 to schedule an appointment.”
- ❑ **BIRTHDAY MESSAGE** – A one part message:
Example – “This is ABC company wishing you a happy birthday. Please stop in and get 10% off.”
- ❑ **BUSINESS CLOSED (To Customers)** – A two part message:
Example – Part 1 = “Hello, this is ABC company notifying you that due to bad weather we are closed and must cancel your appointment on.” DD/MM HH/MM. (the DD/MM day & month and HH/MM time of day is spoken by the system and should not be part of the recording).
Example – Part 2 = “To reschedule your appointment please call us tomorrow at 555-1212.”
- ❑ **BUSINESS CLOSED (To Provider Staff)** – A one part message:
Example – “Hello, this is Amy. Due to the weather, there is no need to come into work today. All appointments have been cancelled.”
- ❑ **INACTIVE CUSTOMER** – A one part message:
Example – “Hello, this is ABC company. We haven’t seen you for a while and miss you. Please stop in and see our new line of products”.

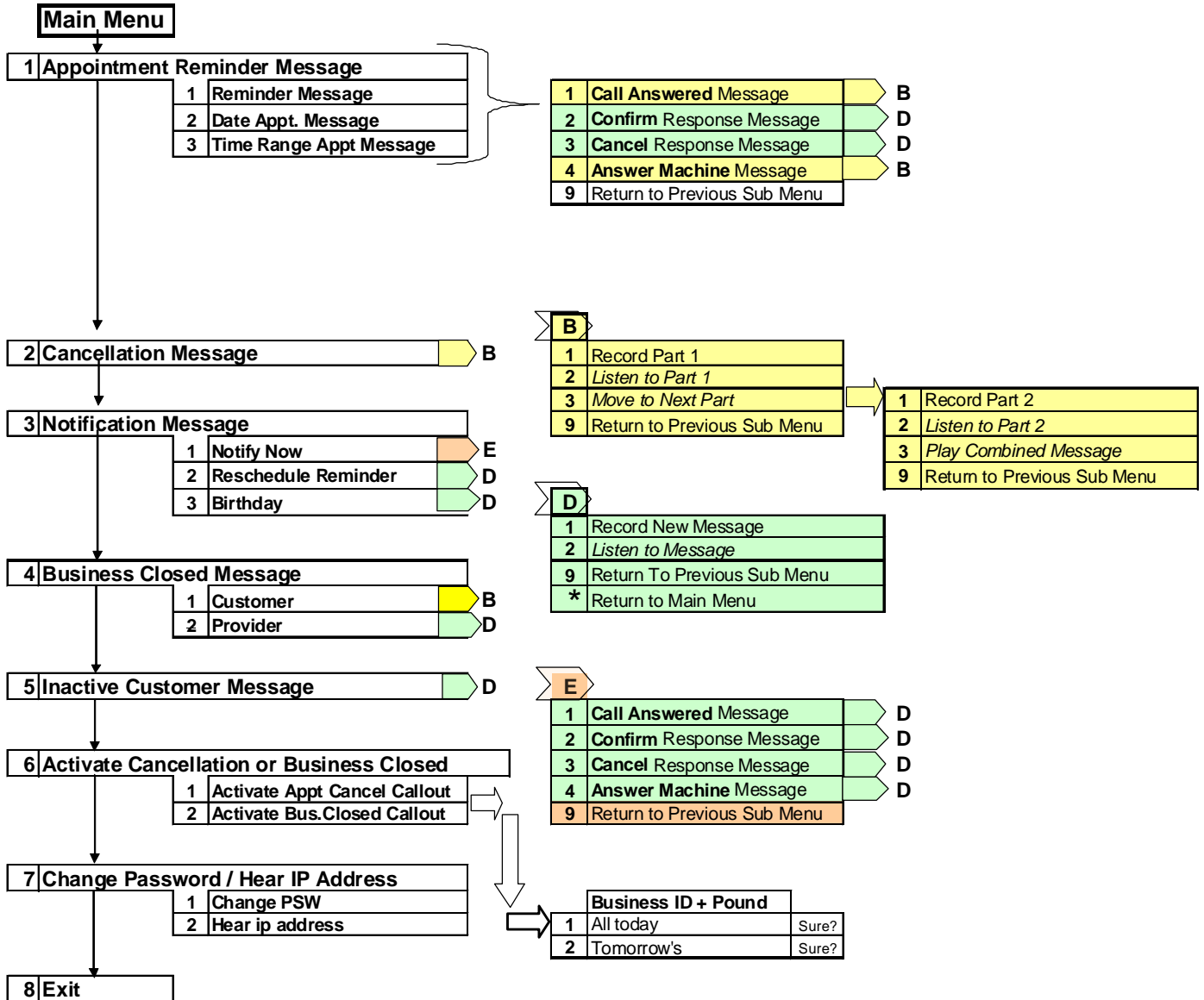
NOTE: If a direct telephone company line is being used, after recording all of the messages, be sure to remove the modular telephone line plug from port 4 bottom connector and move it back to the out calling port 1 top connector on the rear of the Confirm-IT2 server PC.

The Telephone User Interface is also used to activate cancellation callouts from a remote location. As mentioned earlier, in the system administration advanced options, port 1 *in rings* is set to 10 and a port answer delay of 40 seconds. It will answer after 10 rings and start playing the menu 40 seconds later. If there is no answering device or after hours intercept, you can call into port 1 of Confirm-IT to access the TUI Administration menu. *If a phone system analog circuit is connected to port 4, you can access the extension number via the phone system or auto attendant.*

If the business location has more than 1 telephone line, *or has a phone system with available analog ports*, the other Confirm-IT ports can be used for out dialing or to dial into. The Port Administration screen of the Confirm-IT Server can be accessed from a Web Browser of a PC on the local area network.

The following diagram shows the dial menu tree for navigating the TUI.

Confirm-IT2 Telephone User Interface Administration Menu



G:\Final Docs\Recent Work\CI Admin TUI Menu2_23_09.xls

To access the Confirm-IT Telephone User Interface (TUI) Main Menu:
 1. Dial the phone number of telephone line connected to port 1. _____
 2. After 10 rings, the port will answer and ask for your security code.
 3. Press the dial pad digits 2 6 6 3 4 7 6 and then press the pound key (#). 2663476#
 4. Select the desired feature choice by pressing the associated digit.
 You may return to the main menu at any time by pressing the star key (*)

Figure 26 Telephone User Interface Menu Tree

Sample Reception Desk Notice To Clients

The last page of this manual contains a sample notice for the clients to read when visiting the business where Confirm-IT2 is installed. The “NOTICE TO OUR CLIENTS” explains the new appointment reminder feature and requests their feedback or any special reminder related requests.

It is suggested that this sample or one similar be placed in plain view where the clients can see it.

Patient Consent Form for Medical (HIPAA)

If the *Confirm-IT2 Medical* application is installed to remind patients of their appointments, a Health Insurance Portability and Accountability Act (HIPAA) consent form must be signed by each patient for permission to send automated appointment reminders. A copy of a sample form is included in *Appendix A* of this manual. Paragraph 2 of this form pertains to appointment reminders to patients. It is the responsibility of the medical service provider to have a signed HIPAA consent form for each patient entered in the Confirm-IT2 database. **CTL, Inc. will not be responsible for any HIPAA violations.**

Technical Support & Sales Support

Visit www.ctlinc.com for the latest technical update information. Technical Support questions should be addressed to the company that installed your Confirm-IT2 system.

CTL Inc. 375 Bridgeport Ave Shelton, CT 06484 203-925-4266

NOTICE TO OUR CLIENTS

We have recently installed an advanced appointment confirmation system. To maximize its capabilities and to make it the most effective for you, we need your feedback regarding your appointment confirmation. As you may have already experienced, the system allows us to confirm your appointment the day before it is scheduled and remind you with a phone call and/or an email/text message. Our intention is to simply remind you of your appointment. **If you do not receive an appointment reminder or wish to change how, when or where we contact you,** please advise our receptionist so we can make the necessary changes. Thank you.

APENDIX A

HIPAA Information and Consent Form

The Health Insurance Portability and Accountability Act (HIPAA) provides safeguards to protect your privacy. Implementation of HIPAA requirements officially began on April 14, 2003. Many of the policies have been *our* practice for years. This form is a “friendly” version. A more complete text is posted in the office.

What this is all about: Specifically, there are rules and restrictions on who may see or be notified of your Protected Health Information (PHI). These restrictions do not include the normal interchange of information necessary to provide you with office services. HIPAA provides certain rights and protections to you as the patient. We balance these needs with our goal of providing you with quality professional service and care. Additional information is available from the U.S. Department of Health and Human Services. www.hhs.gov

We have adopted the following policies:

1. Patient information will be kept confidential except as is necessary to provide services or to ensure that all administrative matters related to your care are handled appropriately. This specifically includes the sharing of information with other healthcare providers, laboratories, health insurance payers as is necessary and appropriate for your care. Patient files may be stored in open file racks and will not contain any coding which identifies a patient's condition or information which is not already a matter of public record. The normal course of providing care means that such records may be left, at least temporarily, in administrative areas such as the front office, examination room, etc. Those records will not be available to persons other than office staff . You agree to the normal procedures utilized within the office for the handling of charts, patient records, PHI and other documents or information.
2. It is the policy of this office to remind patients of their appointments. We may do this by telephone, e-mail, U.S mail, or by any means convenient for the practice and/or as requested by you. We may send you other communications informing you of changes to office policy and new technology that you might find valuable or informative.
3. The practice utilizes a number of vendors in the conduct of business. These vendors may have access to PHI but must agree to abide by the confidentiality rules of HIPAA.
4. You understand and agree to inspections of the office and review of documents which may include PHI by government agencies or insurance payers in normal performance of their duties.
5. You agree to bring any concerns or complaints regarding privacy to the attention of the office manger or the doctor.
6. Your confidential information will not be used for the purposes of marketing or advertising of products, goods or services.
7. We agree to provide patients with access to their records in accordance with state and federal laws.
8. We may change, add, delete or modify any of these provisions to better serve the needs of the both the practice and the patient.
9. You have the right to request restrictions in the use of your protected health information and to request change in certain policies used within the office concerning your PHI. However, we are not obligated to alter internal policies to conform to your request.

I, _____ date _____ do hereby consent and acknowledge my agreement to the terms set forth in the HIPAA INFORMATION FORM and any subsequent changes in office policy. I understand that this consent shall remain in force from this time forward.