



Mobile Confirmation Agent

How to Use Tracker's Email Confirmation Tools.

Requirements

- Tracker version 11.18 or greater
- A Mobile Confirmation Agent Account through The Bridge Network
- At least 1 computer with Microsoft Office (Word and Outlook) version 2007 or greater.
- Ability to send email from Microsoft Outlook on the above computer(s).

Setup

Setup TWord Templates.

There are 6 templates in total. 3 are for Emailing ('Appointment Confirmation Email', 'Appointment PreConfirmation Email' and 'Appointment Reminder Email'). These 3 templates should be edited to ensure that they contain the message and information you desire.

There are also 3 templates for use with Texting ('Appointment Confirmation Text-SMS', 'Appointment PreConfirmation Text-SMS' and 'Appointment Reminder Text-SMS'). Because text messaging has a maximum of 160 characters, this template should not be edited without consulting The Bridge Network technical support.

Setup the Document Options.

In Tracker click on Configuration | Tracker Options. Click on the 'Documents' tab. Here you indicate which template is to be used for which type of confirmation / reminder:

Email Confirmation:	Appointment Confirmation Email	▼
SMS Confirmation:	Appointment Confirmation Text-SMS	▼
Email Pre-Confirmation:	Appointment PreConfirmation Email	▼
SMS Pre-Confirmation:	Appointment PreConfirmatoin Text-SMS	▼
Email Reminder:	Appointment Reminder Email	▼
SMS Reminder:	Appointment Reminder Text-SMS	▼

Designate the sending computer.

All email and text communications will original from a designated computer. This computer must satisfy the requirements at the top of this document. Go to this computer. In Tracker click on Configuration | Tracker Options. Click on the 'TrackerNet' tab. Under Cloud Settings enter the Username and Password provided to you by The Bridge Network. Next, click on the button labeled 'Use This PC'.

Microsoft Outlook Options.

Disable Outlook Notifications which may block automated emails. In Outlook, do the following:

File | Options | Trust Center

Click 'Trust Center Settings...'

Select 'Programmatic Access'

Select 'Never warn me about suspicious activity (not recommended)'

About Preferred Contact Methods.

We recommend that you set the 'Appt. Related Correspondence:' field for all patients. If you have been collecting email addresses but not setting email as the patient preference, you can set this in bulk with Tracker Utilities. See Frequently Asked Questions for instructions on doing so.

Sending the Electronic Appointment Communication

Types of Electronic Appointment Confirmations

PreConfirmation

Preconfirmations invite the patient to respond to the communication by clicking a link (email) or typing Y (text) to indicate their intent to pre confirm their appointment. Upon successful completion, the 'Preconfirmed' checkbox of the appointment is checked.

Confirmation

Confirmations invite the patient to respond to the communication by clicking a link (email) or typing Y (text) to indicate their intent to confirm their appointment. Upon successful completion, the 'Confirmed' checkbox of the appointment is checked.

Reminder

Reminders do not require any response from the patient. Reminders are simply a one way communication that is sent out close to or on the appointment date to let the patient know they have a confirmed appointment.

Individual Communications

This will send out a single email for a selected appointment.

- On the schedule, select and right-click on the appointment.
- Left click on 'Send Confirmation'. Select Either 'Email' or 'SMS'. For your convenience, the default method of the selected patient is indicated with a checkmark. Select the type of communication you wish to send.
- Tracker will then create communication and add it to the appointment and patient's correspondence tab.

Setting Up Automated Communications

To save time, you can schedule confirmations to be sent automatically based on specified criteria. To set this up:

- Click on Configuration | 'Tracker Options' and select the 'TrackerNet' tab.
- For each type of communication, you can set the following options:
 - **Who gets the communication, and which contact method is used.**
 - 'Do Not Send' Disables automated communications of the selected type.
 - "Preferred Contact Method". Will sent either email or SMS/Text based on individual preference as indicated in the patient file. Patients with no preference are excluded.
 - 'Preferred Contact Method Email'. The same as above however patients who have a valid email but have a preferred appointment contact method of 'Phone' or 'Mail' will get an email communication.
 - 'Email'. Any patient with a valid email will get an email communication.
 - **The # of days prior to an appointment.** For example, if you enter 7, then communication will go out daily for appointments 7 days in the future.
 - **The template used for that communication for Email and Text/SMS.** This allows you to customize the communication based on type and contact method. These templates were discussed in the 'Setup' section earlier in this document.
- **Use This PC.** Clicking this button will set the computer you are using as the computer which sends out the confirmations. The computer should be able to send emails from Outlook as per the Requirements. Other computers will be able to Queue email confirmations as long as they have Word installed and they will go through the computer that is set to be used for confirmations.
- **Confirmation times.** Set the start and end times for auto confirmations. For example, if you set between 11:00AM and 8:00PM emails and texts will only be sent automatically between these times. Manually sending a confirmation will override this setting.

Bulk Confirmations from Appointment Confirmation Manager

The Appointment Confirmation Manager is a report that allows you to search on appointments and send out confirmations in Bulk. It provides greater control than using the Automated Scheduled Confirmations, but requires more effort. This is covered in the 'Tracking, Reporting and Follow Up' section.

Patient Experience

EMAIL

The Tword template created by the office outlines how the patient is to respond. The Mobile Confirmation Agent allows users to confirm appointments. It does not have the ability to reschedule. The template should be used to indicate how the patient can proceed should they need to reschedule or are otherwise unable to confirm their appointment.

When the user clicks on the confirmation link, they are directed to the confirmation website which does the following

- Summarizes the appointment details
- Shows the practice address
- Has a map to the practice (coming soon)
- Has a iCal link to allow patients to add the appointment to their calendar

Hello Patient

✓ Thank you for confirming your appointment.

Time: Friday February 15, 2013 - 10:00 AM 
Staff member: Hyg. Taryn
Location: 600 - 1110 Finch Avenue West, . Toronto

Office Details

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TEXT

Patients receiving text will get the following type of message:

Hi John, your upcoming appointment with TBN Dental is Wed, May 15 2013 at 11:30AM. Please reply with 'y' to confirm your appointment.

When the patient send the response of y, they then receive the following.

Thank you for confirming your appointment!

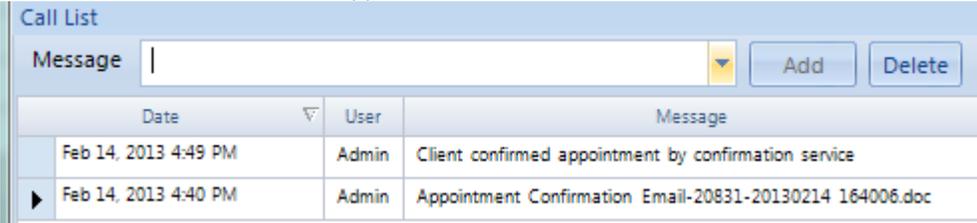
The original message can be customized. However, SMS texting has a built in limitation of 160 characters. Therefore, there is very little room to play with the template variables. Please consult The Bridge Network Technical Support at 1-800-922-7434 x 2 if you plan on changing the SMS-Text template.

If a patient tries responding to your text to ask a question, they will get a response from our system indicating that their text did not reach its destination and that they will need to contact the office to discuss their matter.

Managing Appointment Communications.

Tracking Electronic Confirmations

Appointments that have had an electronic confirmation sent for them will show this in the Call List of that appointment. Electronic Confirmations received will likewise have an entry indicating exactly when the confirmation was received and will mark the appointment as Confirmed.



Date	User	Message
Feb 14, 2013 4:49 PM	Admin	Client confirmed appointment by confirmation service
Feb 14, 2013 4:40 PM	Admin	Appointment Confirmation Email-20831-20130214 164006.doc

Appointment Confirmation Manager

Not all patients can be confirmed electronically. Not all electronic confirmations get responses. The 'Appointment Confirmation Manager' allows you to view Booked appointments for a selected date. It is a grid report which allows the user to filter, sort, group by any column on the report.

The 'Appointment Confirmation Manager' is accessed by clicking 'Schedule' | 'Appointment Confirmations'.

Dates: This filters the report to show only booked appointments for the indicated date range.

All / Confirmed / Not Confirmed: Filters the report based on the appointment confirmation status.

All / Confirmed / Not Preconfirmed: Filters the report based on the appointment preconfirmation status.

All / Has Email / No Email: Filters the report based on whether the contact has email or not.

All / Has Mobile / No Mobile: Filters the report based on whether the contact has a mobile phone number or not.

All / Prefers Email / Prefers Phone / Prefers SMS : Filters the report based on Preferred Contact Method

Confirmations

- **All.** Shows all appointments regardless of confirmation status.
- **Queued.** Electronic confirmation has been initiated but not sent. Click '**Send Queued Confirmations**' to send these.
- **Sent.** Electronic Confirmation has been sent but has not been received. The system automatically checks every few minutes for confirmations but you can force a check by clicking '**Check for Auto Confirmation Responses**'
- **Confirmed.** Electronic Confirmation has been sent and the patient has responded with an electronic confirmation. The appointment is marked as confirmed.

Pre-Med Column. If a patient requires a pre-med then the  icon will show under the Pre-Med column. Hovering on the icon will show you the details of the pre-med

Send Bulk Confirmations Manually

Simply organize your report using the filters specified above. Select the patients you wish to confirm electronically (you can select multiple patients using your mouse with the Ctrl or Shift keys or you can use the 'Select All' button on the toolbar). Then simply click on the 'Send' button on the right and select the method and type of communication you would like.



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Phone Confirmations

If you want to follow up by phone for patients who have not been sent an electronic confirmation, simply group or sort the report by Preferred Contact Method and this will allow you to easily find those people who do not confirm electronically. Likewise, if you need to follow up with patients sent a confirmation but not received, just set the status to include 'Sent' and these patients will show.

Frequently Asked Questions

Q: How do I ensure that automated confirmations continue to work when the office is closed, such as on weekends?

To ensure that email confirmations continue to be sent when you are gone, make sure that Tracker and Microsoft Outlook are running on the computer that has been specified as the Confirmation Server (in Step 3 of the setup section at the start of this document).

Q: How do I show Pre Med information on confirmation and reminder emails

You can update your email template to include Pre-Med info for patients who require this. Simply add the field called 'Pre Meds' to the document. It is located in the 'Contacts' fields in the TWord field selector.

Example: Patient has the following active Pre-Med: Take 1 Amoxicillin 250mg 1 hour prior to appointment. On that patient's email, the following will appear:

Medication Required Prior to Appointment:
Take 1 Amoxicillin 250mg 1 hour prior to appointment.

If the patient has no active premeds, then nothing at all will appear.

Q: How do I set the Preferred Appointment Related Correspondence in bulk?

If you have been collecting emails but not setting the appointment related correspondence for patients, you may find it beneficial to update your database in bulk accordingly. The following steps will set 'Email' as the preference for all patients with a valid email address.

First Back Up your database by clicking on Help | Back Up Database. Then click OK. Proceed once the prompt indicates backup is successfully completed.

- In Tracker click File | Utilities. Log on as the admin user.
- In Tracker Utilities, click on the 'Information' tab. Click on 'Migrate Pref. Contact Methods'
- Check 'Appt. Related Correspondence:'. Uncheck everything else. Click Migrate.

Q: What are the limitations of using SMS/Text messaging compared to emailing?

Text Messages are limited to 160 characters. This prevents you from including very many details and extras including premed, practice info, calendar file. In addition you are limited to plain text so it is not possible to include branding elements such as your logo, website, social media, map, promotions etc. In addition, when family confirmations are introduced they will be limited to email.

Q: What happens when I add a last minute appointment? Which communications go out?

Let's take an example. Automated communications are set up to do preconfirmations 14 days in advance, confirmations 5 days in advance, and reminders 1 day in advance. What if you book an appointment for 2 days from now? Mobile



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Confirmation manager will not send out a pre confirmation or confirmation because we are within 14 and 5 days respectively. It will send a reminder. If you would like a confirmation to go out, you can do this manually in these cases.

