

Crossroads Teletask Auto Dialer Instructions: Appointment Reminders by TEXT MESSAGE or VOICE CALL

The North Carolina (NC) Nutrition Services Branch (NSB) is partnering with Teletask to provide auto dialer services to local agencies. Teletask sends appointment reminders by text message or voice call to WIC participants using data from the **Telephone Numbers** container and **Preferred Method of Contact** field on the **Family Demographics** screen in Crossroads.

- **IMPORTANT:** Appointment reminders will automatically be sent to participants as a text message; should the text be rejected (for example, if the device does not support texting), the system will then send a voice call. Participants cannot choose to have a voice call versus a text message or to have both options. They will receive either a text message or a voice call depending on their device.

Steps to set up Auto Dialer in the local agency:

- 1) Ask all participants who present for services if they would like to receive appointment reminders by text message. Explain to them that if their phone device does not support texting, then they will receive a voice call instead.
Note: If an applicant calls to schedule an **Initial Certification** appointment, the local agency can offer the **Phone** option for **Preferred Method of Contact**. If a participant is being added to an established WIC family by phone, be sure to update the **Preferred Method of Contact** to **Phone** BEFORE adding the participant on the Family Demographics screen. Otherwise, **Proof of Residence** and **Voter Registration** fields will reset to blank and require input to save the screen. DO NOT update **Preferred Method of Contact** over the phone for any other appointment types.
- 2) If the participant would like to receive appointment reminders by text message (voice call, if necessary), complete the following information on the **Family Demographics** screen:
 - **Telephone Number** [update if needed]. Additional telephone numbers may be added if needed.
 - **Type** [update if needed]
 - Select the **Primary** button to indicate preferred number if more than one [update if needed]
 - Select the **Text and Auto Dialer** box on the same row as the **Primary** number
 - Select **Preferred Method of Contact: Phone**
 - **Do NOT use the Confidentiality box**
 - Update the **Language Spoken** if needed. **NOTE: Language Spoken** determines the language of the text message or voice call appointment reminder. If the language spoken is anything other than Spanish, the text message or voice call appointment reminder will be in English.

The screenshot shows the 'Family Demographics' screen in Crossroads. The 'Telephone Numbers' section contains a table with the following data:

Telephone Number	Type	Primary	Do not call	Text and Auto Dialer
919-555-1212	Cellular	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
919-555-1111	Home	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

The 'Preferred Method of Contact' dropdown is set to 'Phone'. The 'Confidentiality' checkbox is unchecked. A red box highlights the 'Confidentiality' checkbox with a red arrow pointing to a 'DO NOT USE!' warning box.

DO NOT USE!

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Local agencies do NOT need to complete any other steps or inform the NSB if they choose to use the Auto Dialer. Crossroads sends a file of participants with scheduled appointments, **Preferred Method of Contact = Phone** and the **Auto Dialer** box checked to Teletask using a state-wide nightly batch process.

Reminder text messages or voice calls in English or Spanish are made two days in advance of appointments. The schedule of calls is shown below:

Day of Appointment	Wednesday	Thursday	Friday	Saturday	Monday	Tuesday
Phone Calls made at	Mon at 10AM	Tue at 10AM	Wed at 10AM	Thu at 10AM	Sat at 10AM	Sun at 10AM

Text Appointment Reminder Template in ENGLISH	Text Appointment Reminder Template in SPANISH
Hello, your WIC appointment is scheduled on <Appointment Day> <Appointment Date> at <Appointment Time> @ <Clinic Name> location. Should you need to reschedule, please call <Clinic Phone Number> during office hours.	Hola, su cita de WIC está programada para <Appointment Day> <Appointment Date> a las <Appointment Time> en la ubicación de <Clinic Name>. Si necesita reprogramar su cita, por favor llame a <Clinic Phone Number> durante el horario de oficina.

Telephone Appointment Reminder Template in ENGLISH	Telephone Appointment Reminder Template in SPANISH
Hello, your WIC appointment is scheduled on <Appointment Day> <Appointment Date> at <Appointment Time> at the <Clinic Name> location. Should you need to reschedule, please call <Clinic Phone Number> during office hours. We look forward to seeing you on <Appointment Day> <Appointment Date> at <Appointment Time>.	Hola, su cita de WIC está programada para <Appointment Day> <Appointment Date> a las <Appointment Time> en la ubicación de <Clinic Name>. Si necesita reprogramar su cita, por favor llame a <Clinic Phone Number> durante el horario de oficina. Esperamos verlo el <Appointment Day> <Appointment Date> a las <Appointment Time>.

EXAMPLE:

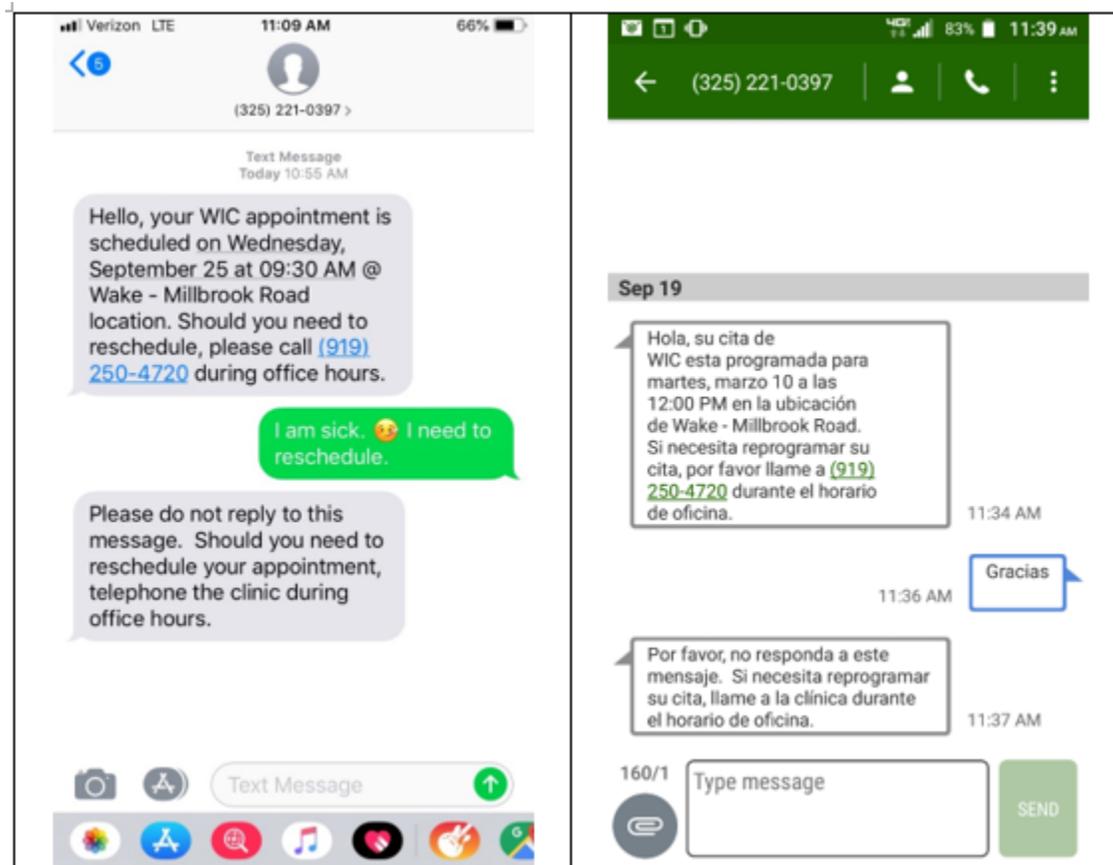
Hello, your WIC appointment is scheduled on Monday, November 5th at 1 PM at the Wake Millbrook Road location. Should you need to reschedule, please call 919-250-4720 during office hours. We look forward to seeing you on Monday, November 5th at 1 PM.

- The content of the Appointment Reminder template, as shown above, **cannot** be modified by the local agency.
- The name of the participant and the appointment type will not be included in the appointment reminder message.
- The Clinic Name and Clinic Phone Number are generated from the **Clinic Setup** screen in Crossroads.
 - **IMPORTANT:** The Clinic Name is the location of the family NOT the location of the appointment! If the family location and the appointment location do not match, **TRANSFER** the family to the clinic where the appointment has been made.
 - If the Clinic Name and/or Clinic Phone Number has changed from initial Crossroads setup, the local agency must call the NSB Customer Service Desk with updated information.

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Additional Information about Auto Dialer

- Participants cannot reply to the one-way reminder text messages
- Automated appointment reminders will be sent for all **scheduled** appointment types except for Nutrition Education classes.
- If there are multiple appointments scheduled for a family on the same date, only ONE reminder will be sent. The reminder will be made for the earliest appointment time.
- Auto Dialer will NOT be used for Missed Appointment Notifications. Local agencies are still required to provide missed appointment notifications for Initial and Subsequent Certifications. The process for printing missed appointment notifications for families with a **Preferred Method of Contact: Phone** is listed below.
- Appointment reminder text messages will have the caller ID: **888-987-9725**. Please share this number with participants so they can add the number to their contacts.



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Printing Missed Appointment Notifications for Families with Preferred Method of Contact: Phone

- 1) In Crossroads, navigate to Operations > Notifications
- 2) Enter the following **Search Criteria**:
 - **Communication Method: Phone**
 - **Appointment Date From** and **To** for desired date ranges
 - **Appointment Status: Missed**
- 3) Click **Search**. Search Results Container populates as shown below.

The screenshot displays the 'Search Criteria' and 'Search Results' sections of the software interface. The 'Search Criteria' section includes three main groups: 'Communication Method' with checkboxes for Mail, E-Mail / Text, and Phone (checked); 'Appointment' with 'Appointment Date' fields for 'From' (9/1/2018) and 'To' (9/30/2018), and 'Appointment Type' and 'Appointment Status' (Missed) dropdown menus; and 'Family' with 'Family ID' and 'Family Last Name' text input fields. 'Search' and 'Clear Criteria' buttons are on the right. The 'Search Results' section shows a table titled 'Appointment Communications - Search Results' with 5 items. The table columns are: E-mail/Text, Print, Phone, Family ID, Parent / Guardian Name, Preference, Appointment Type, Appointment Date, Appointment Status, and Attachments. All rows show missed appointments with a preference for phone contact.

	E-mail/Text	Print	Phone	Family ID	Parent / Guardian Name	Preference	Appointment Type	Appointment Date	Appointment Status	Attachments
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004375	Alice Champion	Phone	Subsequent Certification	09/14/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004384	Melissa Marmot	Phone	Subsequent Certification	09/11/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004403	Barbara Boston	Phone	Mid-Certification Assessment	09/12/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004438	Gold Fish	Phone	Initial Certification	09/13/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004438	Gold Fish	Phone	Initial Certification	09/13/2018	Missed	

- 4) Uncheck **Phone** and check **Print** for each Missed Appointment Notification you would like to print.
- 5) Select **Print Mailing Labels?: Yes** or **No**
- 6) Click **Complete Communications**. Missed Appointment Notifications will print and a Status Message of successful will pop up.