Introduction

The **Teletask Health Messenger** platform provides two-way texting and group messaging between local agencies and WIC participants. This resource includes information on how to create and send **group messages** about agency-specific information or special events such as emergency closures. Local users will only be able to see messages from the clinic(s) they have permissions for. For information about how to create a login profile and set a password, and an overview of the Dashboard and two-way texting (or **Chat**) functionality, see the resource **Teletask Two-Way Texting**.

IMPORTANT: Teletask Health Messenger does **NOT** work correctly when *Internet Explorer* is used; please choose an alternative web browser such as Microsoft Edge, Mozilla Firefox or Google Chrome. In addition, Teletask Health Messenger must only be used on agency-issued electronic devices and user accounts (no personal devices) and must be limited to accurate and straightforward communication including use of proper punctuation, spaces, only easily understood abbreviations included on the local agency's approved abbreviation list, and not using images or icons (i.e., emojis).

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How to Create and Send Group Messages

Group Messages are used to send a message to a specific participant or a Contact Group. These message "blasts" can be sent immediately or can be scheduled for a future date and time.

1. **Select Messages in the top menu bar.**

Figure 1.1 The menu bar is at the top of your Teletask dashboard.

2. **Select the Create Message button in the top right-hand corner.**

Figure 1.2 The Create Message button.

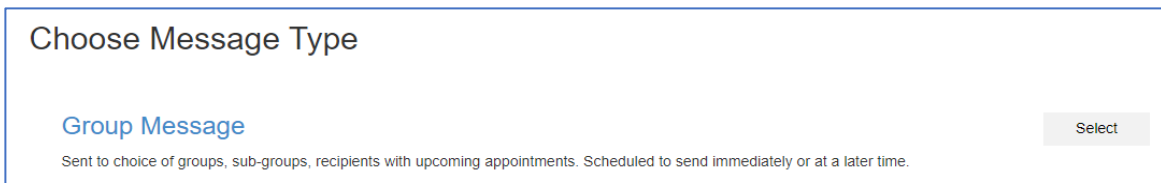3. **Click the Select button for Group Message.**

Choose Message Type

Group Message
Sent to choice of groups, sub-groups, recipients with upcoming appointments. Scheduled to send immediately or at a later time.

Select

Figure 1.3. The Select button is to the right of the Group Message option.

4. **The Message Properties window appears.** *(Figure 4 below.)* Enter a Name for the new message.
5. **Select the Languages you would like to use.** Only English and Spanish are available.
   Note: Language is determined by selections on the Crossroads Family Demographics screen.
6. **Check the boxes for the Message Type you want to send. Most NC WIC messages are Text.**
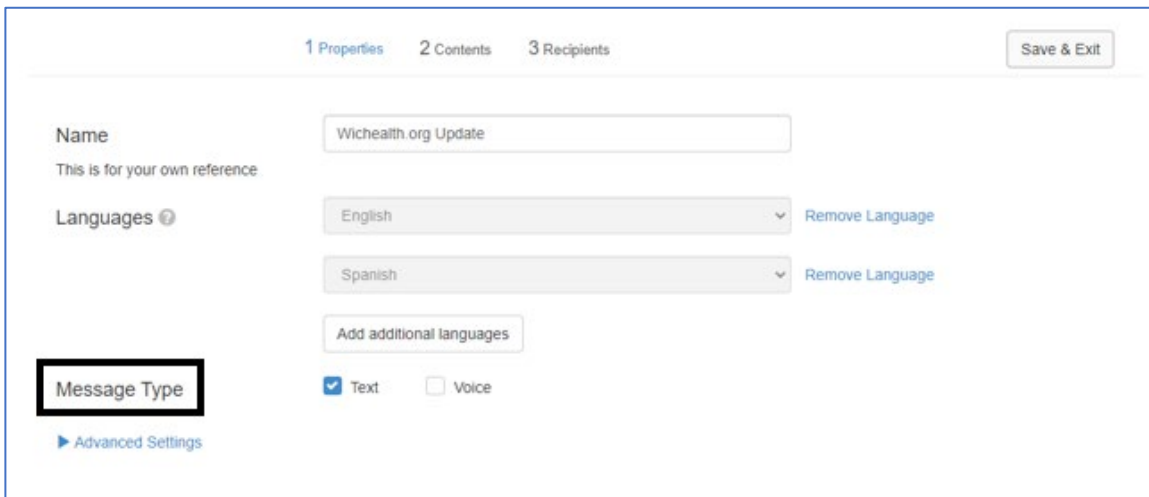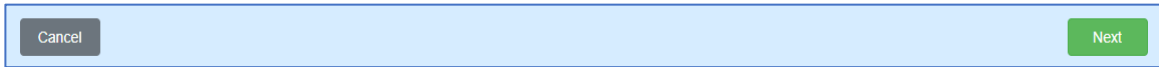

Figure 1.4 The Message Properties window.

7. Press the Next button to proceed to the Contents section.

8. Click the Start button for the message you want to create.

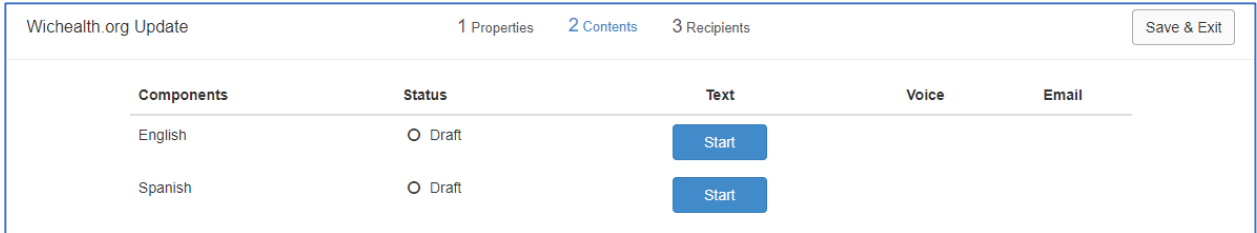The message is limited to 306 characters maximum.

Figure 1.5 Start button in the Contents section.

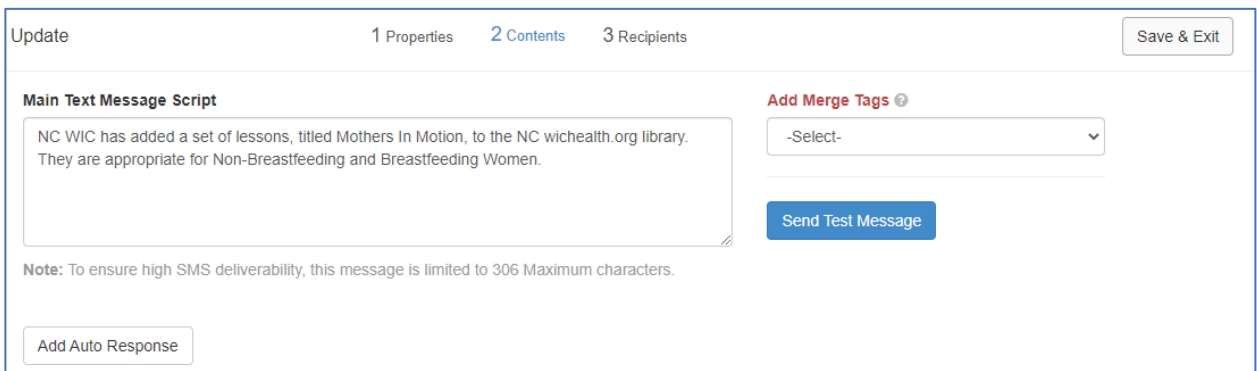**9. Once you have written the English message, select Save & Exit.**

Figure 1.6 Save & Exit button is on the top right.

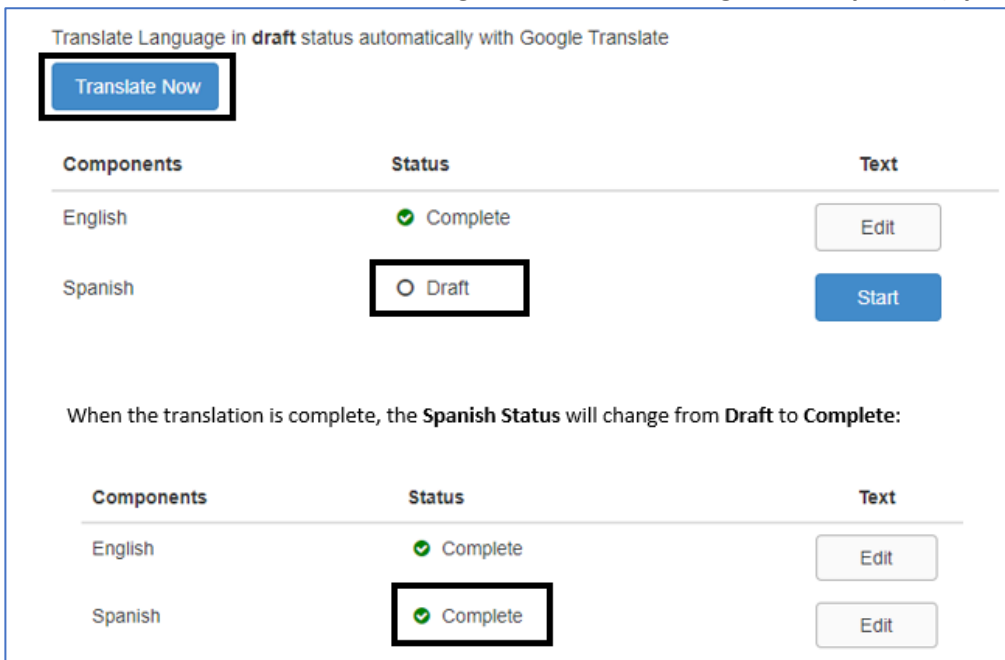**10. Press the Translate Now button *Google Translate* from English into Spanish (optional).**

Figure 1.7 The Translate window.

11. **Once you have finished your messages, click the Next button in the bottom right-hand side of the screen to proceed to the Recipients section.**
    Note: You can click Edit if you need to make any changes to your messages.

12. **Under the Select Contact Groups heading, check the boxes for the groups that you want to receive the message.**
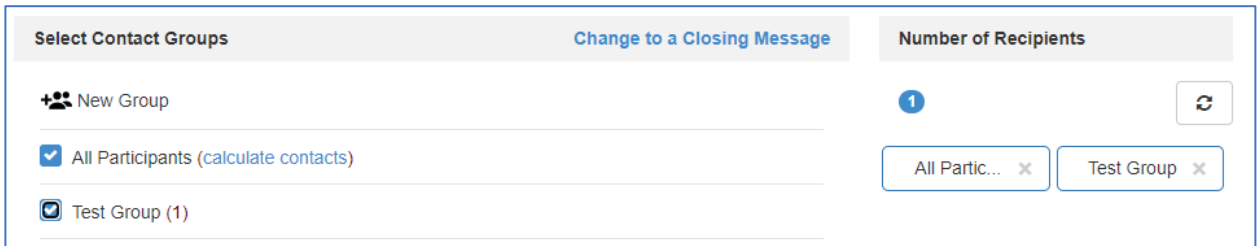

Figure 1.8 Contacts Groups window.

13. **Under the Add Filters heading, you can choose if you want this message to apply to specific clinics or all clinics in your agency.** The default is set to **All**. If you want to choose specific clinics, click on **All** and the slider will change to **Select**.


Figure 1.9 Click All to change to the select option to a list of clinic name(s) if you want to send a specialized message.

14. <u>Option</u>: **Click Add Contacts and enter a name or a phone number of an existing contact. This option can be used to send the message to a specific person or to add one person to a list of groups.**
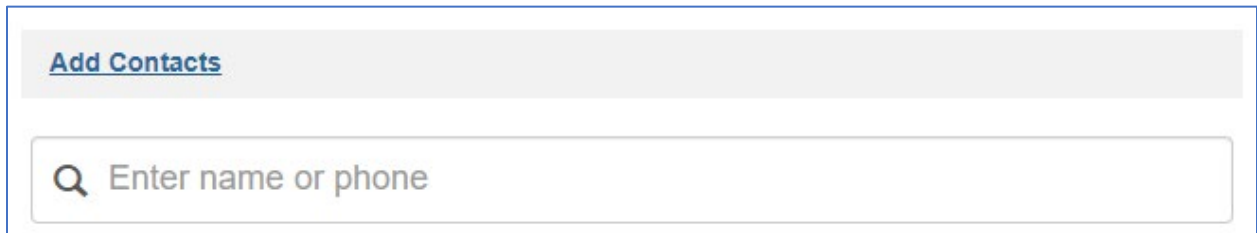
1.10 Add another person to your Group message, or send to a specific person.

15. **Now Schedule your message for a future date and time or Send immediately.** Default is set to Send. Click on Schedule if you would like to use that option.
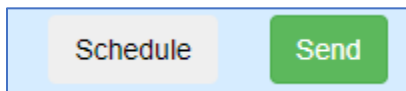
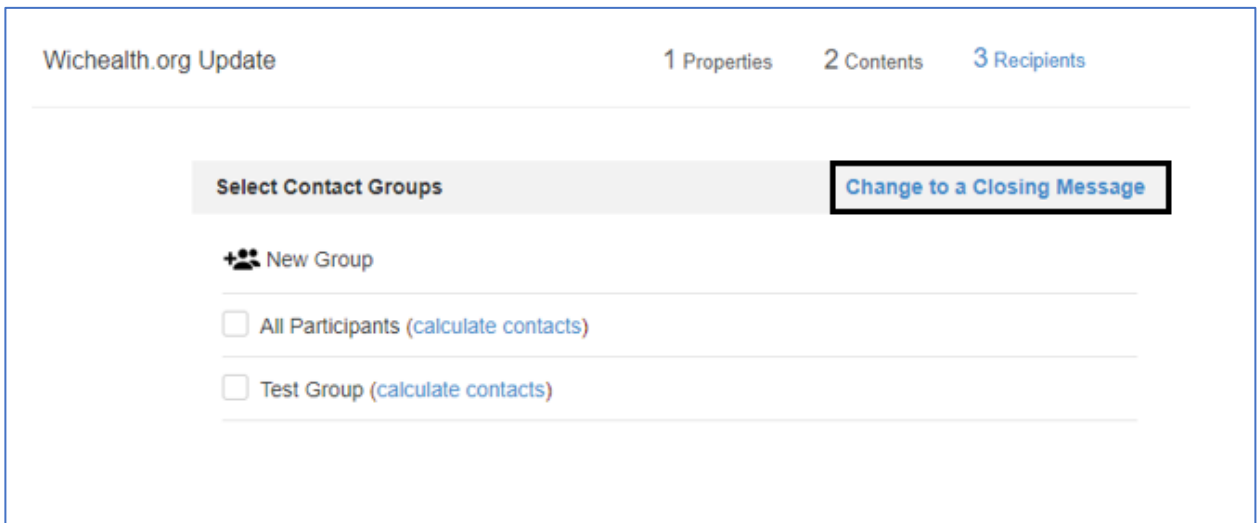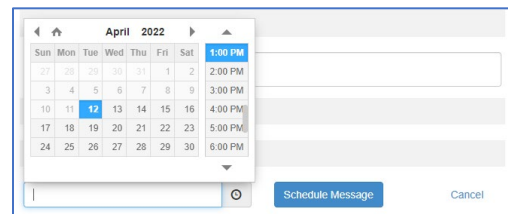*1.11 Select Schedule to send later, or Send now.*

Figure 1-12 Congratulations! Your message is on the way.

How to Create and Send Closing Messages

Closing messages are used when an office closes unexpectedly (e.g., due to hazardous weather conditions or infectious disease outbreak). Closing messages are sent <u>automatically</u> **to participants with a scheduled appointment** during the time frame you specify.

After creating a group message using **steps 1-11** in **How to Create and Send Group Messages**, complete the following actions:
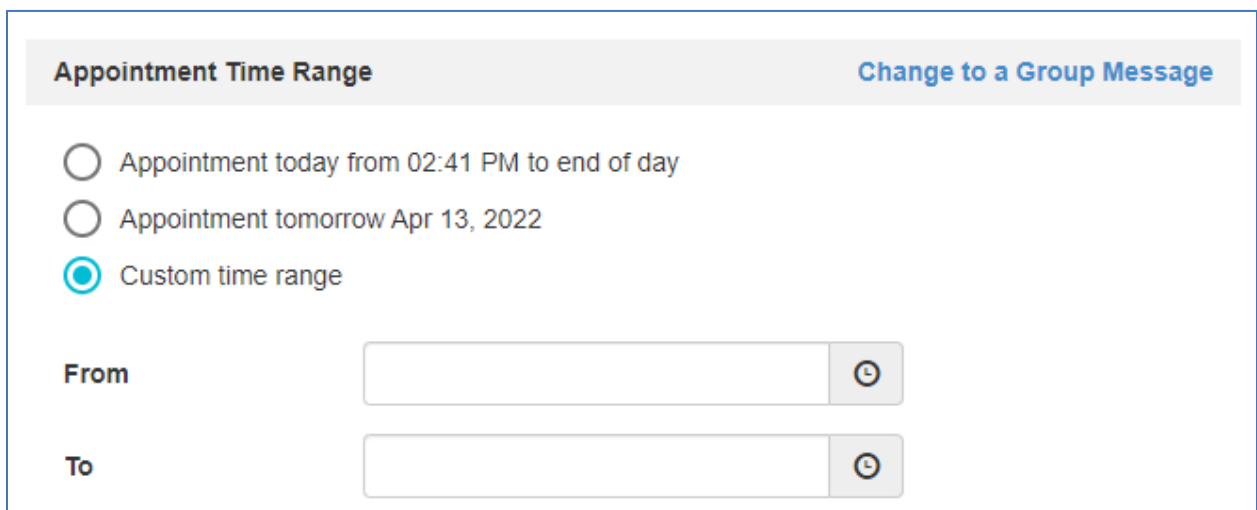
1. **To the right of Select Contact Groups, choose the option to Change to a Closing Message.**

Figure 2.1 Do this after you choose Groups to receive your message.

2. **Select the Appointment Time Range you would like the message to apply to.** Quick options include for the end of the current day, tomorrow, or a custom time range that you can select**.**
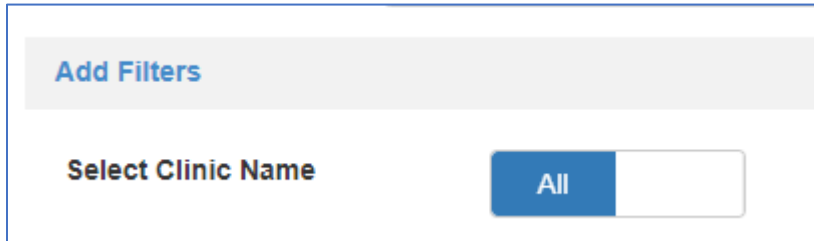

Figure 2.2 Choose when the Closing Message will send.

3. **Under the Add Filters heading, you can choose if you want this message to apply to specific clinics or all clinics in your agency.**
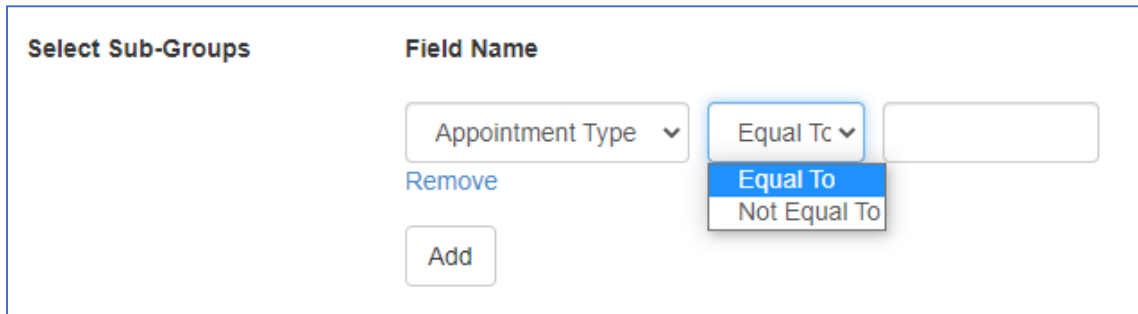   The default is **All.**

Figure 2.3 Who will get the Closing message.

4. **You can also choose to Select Sub-Groups for a message, an example would be to send the Closing Message to only specific types of appointments.**
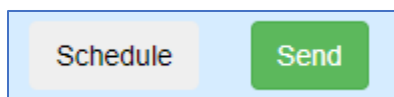

Figure 2.4 Direct the message to a very specific audience.

5. **Now Schedule your message for a future date and time or Send immediately.**
   Default is set to **Send.** Click on **Schedule** if you would like to use that option.

IMPORTANT:
- Closing Messages will cancel all Appointment Reminders that have been scheduled in Teletask and loaded into the system.
- If Appointment Reminders have not been scheduled in Teletask, then sending a closing message will not send any messages to participants.

How to Add Merge Tags in Messages

1. **In the Contents section of Creating Messages, there is an Add Merge Tags drop-down box to the right of the Main Text Message Script.**
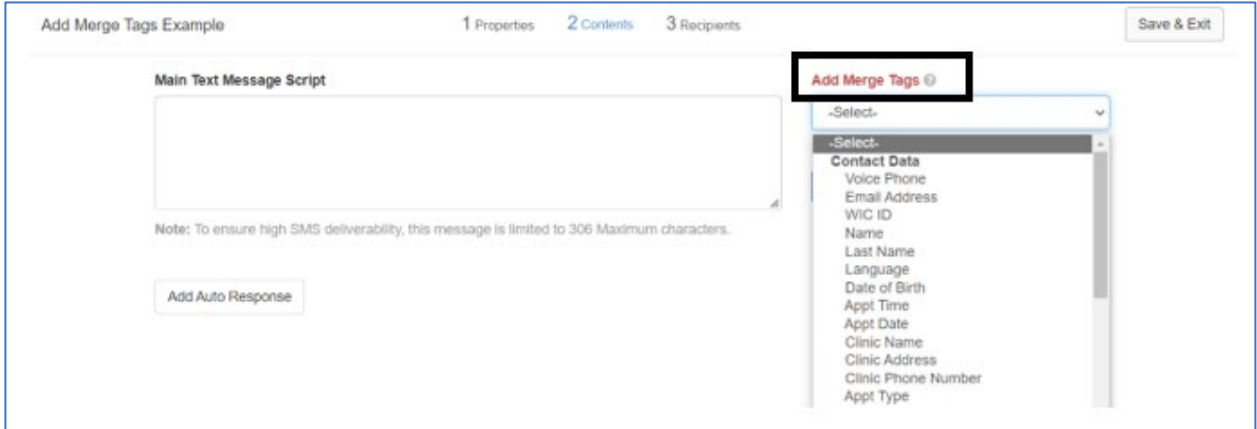

Figure 3.1 Merge Tags help you customize your message.

2. **Select applicable Merge Tags to add to the message.** Merge Tags can be used to automatically add information to a message such as participant's name, appointment date and time, and clinic location.
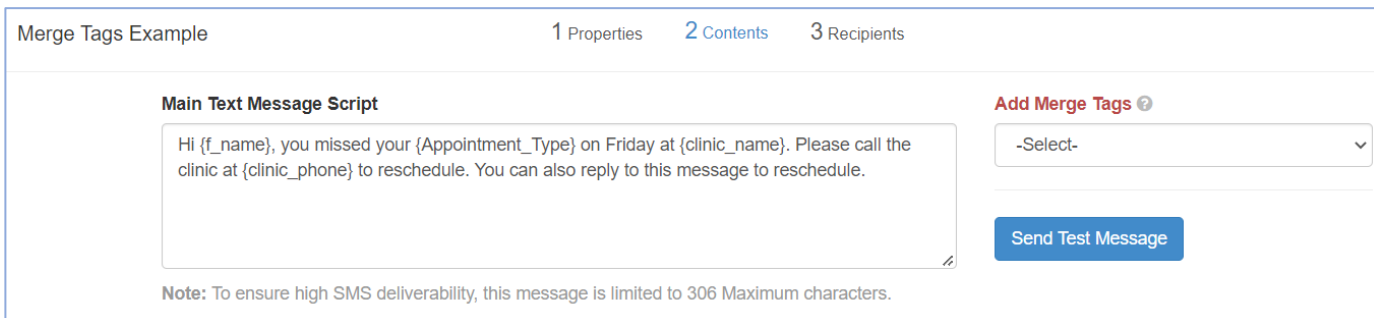
3. **Example of a Merge Tag:**

Figure 3.2 Four Merge Tags applied to a missed-appointment message.

The participant would receive the following message:

> Hi, **Jane Doe**, you missed your **Subsequent Certification appointment** on Friday at **Nash-Rocky Mount WIC**. Please call the clinic at **919-555-1212** to reschedule. You can also reply to this message to reschedule.

NOTE: To **preview** the message, you can select **Send Test Message**. Enter a 10-digit clinic cell phone number and receive a sample of the text.
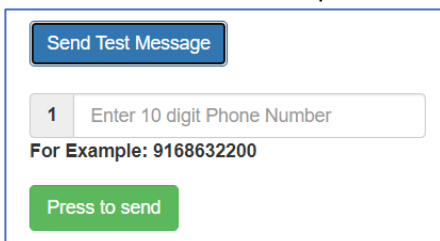

Figure 3.3 Test your message before you send it to others.

How to Include URLs or Links to Websites in a Message

A URL is a link to a website address and can be used to direct your participants to your webpage or other recommended sites. You can also shorten URLs when sending the text message.
Note: URL shorteners such as bit.ly that offer a short URL will be blocked by the recipient's mobile phone provider as spam. **Teletask shortened URLs are _not_ blocked.**

1. **Navigate to the message you are wanting to modify (to add a URL).**
   Within the Contents section of a Message, select the Edit option under the message type you are wanting to use.
2. **In the message box, add the URL you want to include.** (See Figure 4.1 below.)
   Note: Use the full URL and not a shortened version.

Figure 4.1 The Text Message Script contents

3. **If you want to shorten the link, select the Shorten Link option below the message.**
   If the Shorten Link option does not appear, you will need to select the Enter key on your keyboard after the url (while in the Main Text Message Script box).
   Only the first link entered in a text message can be shortened.
4. **Note: the link will be shortened when sent but does not appear in the Main Text Message Script.**
   The shortened link will have the following shortened url: **https://hms.teletask.com** followed by 5 characters. Example: **https://hms.teletask.com/ezcwy**

5. You have the option to return to the original link by clicking Change Link to display as printed.

Main Text Message Script

NC WIC has added a set of lessons, titled Mothers In Motion, to the NC wichealth.org library. They are appropriate for Non-Breastfeeding and Breastfeeding Women.

https://www.nutritionnc.com/wic/

110 characters remaining / 2 message(s)

**Note:** To ensure high SMS deliverability, this message is limited to 306 Maximum characters.

Link to be shortened when sent. Change Link to display as printed

Figure 4.2 Final steps.

6. Select Next to save the changes.

7. Once you have finalized your message, select Save & Exit or Schedule/Send.

How to Generate Message Reports

To generate a report of message results and responses, navigate to **Reports** in the top menu bar
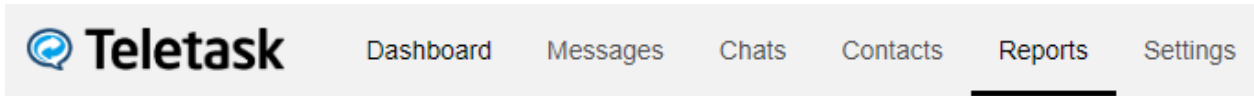
1. **Select On Demand as your report type.**
2. **Select a Message Type.** Select the type of message to report on: Voice or Text. (Voice is selected by default. Most NC messages are Text.)
3. **Select a Message Group or choose All**. (All is selected by default.)
4. **Select a Date Range based on Message sent date or Appointment date.**
5. **Select a Starting date and Ending date.**
6. **Select a Clinic Name.** All is selected by default.
7. **Select Generate Report**. This will create the report based on the parameters set. The report can be viewed on screen, printed, or downloaded as a .csv file.
8. **Best practice is to download as a .csv file using the download icon, and save as an excel spreadsheet and filter/print reports as needed.**

Example:

Figure 5.1 Setting a Message Report.

The report generated in the example has the following parameters:
Message Type – Text
Message Group – All
Date range: 3/14/21 – 3/14/21
Clinic Name: Cumberland-Fayetteville

Results:

Result	#	%	Explanation
Not Yet Sent	0	0%	Texts that are unsent for this date range.
Received	68	93%	Texts received successfully by participants.
Responses	15	21%	Number of participants who have responded by text for messages sent in this date range.
Undelivered	5	7%	Number of undelivered texts. Teletask then attempts to deliver the message by voice. Generate a Voice report to see these results.
Opted-Out	0	0%	The participant has texted back the word STOP and will no longer receive messages from Teletask. To re-opt-in to receive messages they would need to text UNSTOP to the same phone number.
Errors	0	0%	Text was not received successfully. Reasons may include phone is disconnected, out of minutes, not accepting texts or the text has been marked as spam. **Investigate these numbers/put an alert in the Crossroads record to follow up with the participant.**
Stopped	0	0%	Voice messages that were stopped because the text message was sent successfully.
Clinic Name Closed	0	0%	Clinic or agency has opted out of two-way texting.
Invalid Numbers	0	0%	The number was invalid such as a number that cannot exist (999-999-9999), a number with a country code, or a number that does not have the required 10 digits. **Investigate these numbers.**
Total Messages	**73**	**100%**	