

## Uploading Recipients to Teletask for Scheduled Messages


The Teletask Health Messenger Platform sends Auto Dialer appointment reminders and provides two-way texting (“chat”) and group messaging between local agency staff and WIC participants. For more information see the resources on the Community Nutrition Services Section (CNSS) website under [Teletask](#). The **Upload** option has been enabled on the NC WIC Teletask account for **Scheduled Messages**. Teletask has a Knowledge Base Article, *How To: Create an Imported Scheduled Message and Upload Files as a User*, with step by step instructions here: <https://teletask.zohodesk.com/portal/en/kb/articles/how-to-create-import-scheduled-message-upload-files-as-user>. Step 13 of this Teletask article describes uploading reports. There are several Crossroads reports that have been modified specifically to be used with Teletask. These reports are:

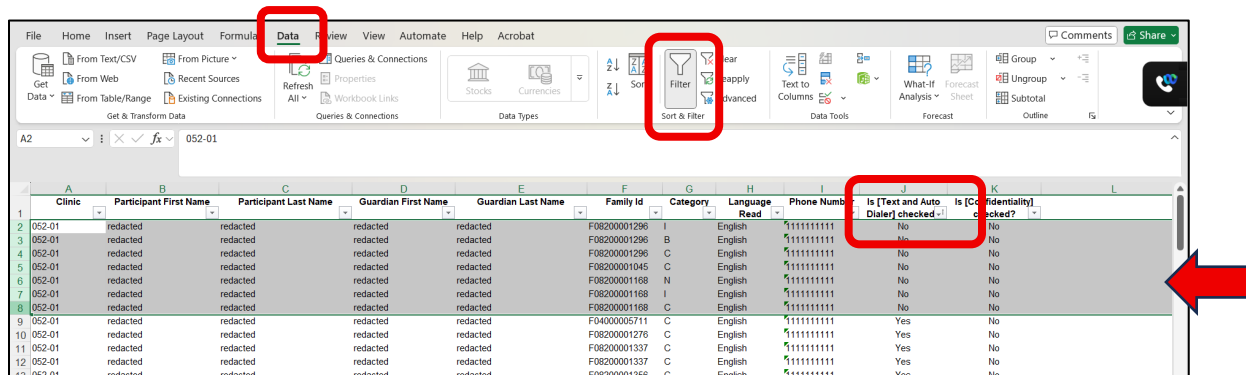
- Active Contacts
- Detail Clinic Daily Appointment Schedule with Phone
- Detail Nutrition Education Appointment Schedule with Phone
- Appointment History Report with Phone

This resource includes instructions for:

- How to filter the above reports to remove families that have not opted in to Teletask.
- How to remove duplicates from reports to get an accurate count of recipients.

### How to filter reports before uploading to Teletask

1. Run the report, download as an Excel file, and save it to an easily findable location on your computer such as your Desktop. Best practice: rename the file with the clinic name and date of the report, such as: *JonesActiveContacts8.21.25.xls*. **Important:** Teletask recognizes only **the first sheet** of uploaded reports. If your report has more than one sheet (or tab), cut and paste from the multiple tabs onto the first tab before filtering.
2. Filter out families that have not opted-in to Teletask two-way texting.
  - a. Select any cell with data.
  - b. Select **Data > Filter**.
  - c. Select the column header arrow  for the **Is [Text and Auto Dialer] checked?** column.
  - d. Select **Sort A to Z**
  - e. The report will sort with **Is [Text and Auto Dialer] checked? = No** rows at the top.
  - f. Highlight all rows with **Is [Text and Auto Dialer] checked? = No**. In the screenshot below, these are rows 2-8.
  - g. Right-click and select **Delete**.




|    | A      | B                      | C                     | D                   | E                  | F            | G        | H        | I            | J                                  | K                             |
|----|--------|------------------------|-----------------------|---------------------|--------------------|--------------|----------|----------|--------------|------------------------------------|-------------------------------|
|    | Clinic | Participant First Name | Participant Last Name | Guardian First Name | Guardian Last Name | Family Id    | Category | Language | Phone Number | Is [Text and Auto Dialer] checked? | Is [Confidentiality] checked? |
| 1  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001296 | I        | English  | 1111111111   | No                                 | No                            |
| 2  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001296 | B        | English  | 1111111111   | No                                 | No                            |
| 3  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001296 | C        | English  | 1111111111   | No                                 | No                            |
| 4  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001045 | C        | English  | 1111111111   | No                                 | No                            |
| 5  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001168 | N        | English  | 1111111111   | No                                 | No                            |
| 6  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001168 | I        | English  | 1111111111   | No                                 | No                            |
| 7  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001168 | C        | English  | 1111111111   | No                                 | No                            |
| 8  | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001168 | C        | English  | 1111111111   | No                                 | No                            |
| 9  | 052-01 | redacted               | redacted              | redacted            | redacted           | F04000005711 | C        | English  | 1111111111   | Yes                                | No                            |
| 10 | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001276 | C        | English  | 1111111111   | Yes                                | No                            |
| 11 | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001337 | C        | English  | 1111111111   | Yes                                | No                            |
| 12 | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001337 | C        | English  | 1111111111   | Yes                                | No                            |
| 13 | 052-01 | redacted               | redacted              | redacted            | redacted           | F08200001356 | C        | English  | 1111111111   | Yes                                | No                            |

## Uploading Recipients to Teletask for Scheduled Messages

3. Filter out families that have the **Confidentiality** box checked.

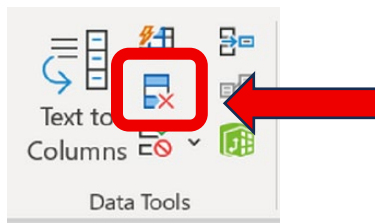
**Note:** NC WIC does not use the Crossroads **Confidentiality** box. If your Local Agency uses the **Confidentiality** box, please be aware that it interferes with Teletask functionality. Removing this box is on the NC WIC Crossroads Wishlist.

- a. Select the column header arrow  for the **Is [Confidentiality] checked?** column.
- b. Select **Sort Z to A** so rows with **Yes** will appear at the top of the report (**NOT A to Z** which would put rows with **Yes** at the bottom)
- c. The report will sort with **Is [Confidentiality] checked? = Yes** rows at the top.
- d. Highlight all rows with **Is [Confidentiality] checked? = Yes**.
- e. Right-click and select **Delete**.

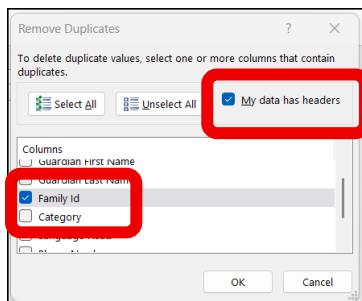
### How to remove duplicate family members from reports before uploading to Teletask

**Note:** When you use the **Remove Duplicates** feature, the duplicate data is permanently deleted. Before you delete the duplicates, it's a good idea to move or copy the original data to another worksheet so you don't accidentally lose any information.

1. Select the range of cells that has duplicate values you want to remove.
2. Select **Data > Remove Duplicates**.

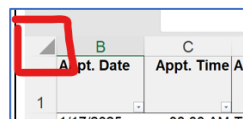


3. Under **Columns**, check **My data has headers** and **Family id**. Select **OK**. Select **Save**.



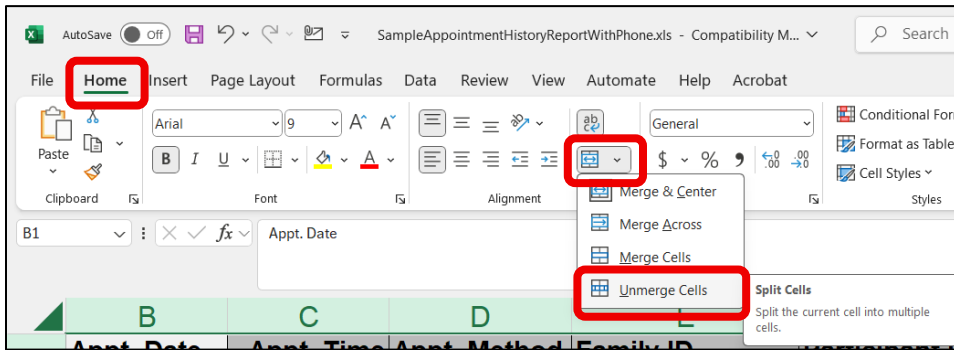
**NOTE:** If at any point you get an error message stating "To do this, all the merged cells must be the same size" select OK and then:

1. Click on the **Select All** box in the upper left corner of your spreadsheet to highlight the entire table:



## Uploading Recipients to Teletask for Scheduled Messages

### 2. Select Home > Unmerge Cells



### Important Notes about this Teletask functionality:

This resource was designed to complement the Teletask instructions at this link:  
<https://teletask.zohodesk.com/portal/en/kb/articles/how-to-create-import-scheduled-message-upload-files-as-user>

**Step 6** of the Teletask instructions is about language selection. If the Crossroads report you are using contains a **Language Read** column, **Language Read** determines the language of the message to be sent. If the **Language Read** is anything other than English, select the language(s) in the drop down, then follow the directions in **Step 11**.

**Step 11** contains information about Multiple Languages. NC WIC strongly recommends that any messages sent via Teletask that are not in English be translated by a qualified interpreter. If the **Language Read** column in the report you are uploading contains any language other than English, that language will be used IF a translation is provided in this step.

**Step 13** describes selecting a template. For NC WIC there are four template options, that correspond to the reports modified for Teletask:

| Teletask Upload File Name              | Crossroads Report Name                                     |
|--|--|
| NC: Contacts Report (xls)              | Active Contacts  |
| NC: Appointment Report (xls)           | Detail Daily Appointment Schedule with Phone               |
| NC: Nutrition Education (xls)          | Detail Nutrition Education Appointment Schedule with Phone |
| NC: Appt History Report w/ Phone (xls) | Appointment History Report with Phone                      |

For questions about Teletask, please contact the Teletask Help Desk at 866-863-1108 or submit a [New Ticket](#). To add new Teletask users, or for help with Crossroads procedures, please contact the CNSS Customer Service Desk at 919.707.5795, or via email at [CNS.CustomerService@dhhs.nc.gov](mailto:CNS.CustomerService@dhhs.nc.gov). If you have questions regarding any policy aspect of this document, please contact your Regional Nutrition Consultant.