

Teletask Basics

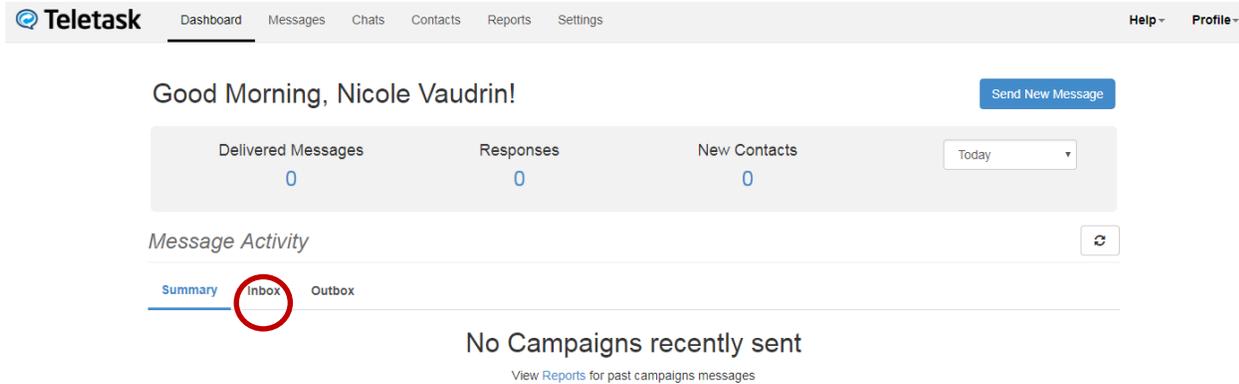
*If you have any issues with Teletask, please call Nicole at (602) 307-1508

Log-In

- Access the site at <https://hms.teletask.com>

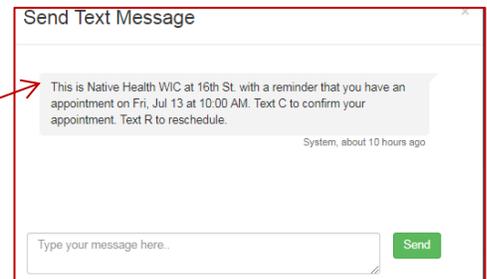
Chats – Client Responses to Appointment Reminders

1. From the Dashboard, look at ‘Message Activity’ and click on ‘Inbox’. You will see all messages sent from clients to you.



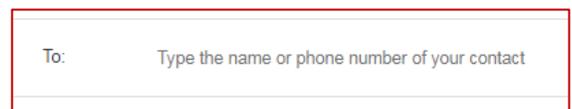
2. Click ‘Reply’ to respond to the message received. **Note:**
 - The name listed is for the client not the caregiver.
 - The client’s appointment time and time the messages was received is listed.
 - Reply within one business day of receiving the message.
 - Set reminders to check messages at least twice a day (ex. 11:30 and before you leave)
 - The response is also shown. You do NOT need to respond to confirmed messages. They automatically receive the message ‘Thank you for confirming your appointment. We look forward to seeing you soon!’

Appt Time	Clinic	Received	Response	Reply
07/13/2018 01:00PM	Native Health WIC Dunlap Clinic	07/12/2018 11:02PM	Reschedule	Reply 1
07/13/2018 09:20AM	Native Health WIC Dunlap Clinic	07/12/2018 10:48PM	Confirmed	Reply
07/13/2018 03:50PM	Native Health WIC at 16th St.	07/12/2018 09:50PM	Reschedule	Reply 1



Chats – Staff Initiated

1. Go to ‘Chats’
2. Click the pencil & paper icon
3. Type in the phone number or clients name (it will find the client if they have been sent a message and are in the system)
4. Type your message in the box below



Reports – Client Follow-up

Run reports for Voice and Text messages sent daily. Follow-up with clients who did not receive a voice, text or both messages.

1. Go to 'Reports' and click the 'On-Demand' tab
2. Select 'Voice' message report. The date range defaults to today.
3. Click 'Generate Report'

The screenshot shows the 'Reports' section of a web application. The 'On-Demand' tab is selected. Under 'Message Type', 'Voice' is selected. The 'Date Range' is set to 'Starting 07/13/2018' and 'Ending 07/13/2018'. The 'Generate Report' button is highlighted in green. In the top right corner, the 'Profile' tab is open, showing the user's name 'Nicole Vaudrin' and the 'Receive email reports' checkbox, which is checked.

4. Click 'Schedule Report' to get a report emailed to you daily.
NOTE: Go to the 'Profile' tab in the upper right corners and make sure that the 'Receive email reports' box is checked.

The 'Schedule Report' form shows 'Voice messages' in the 'Report Name' field. The 'Schedule' is set to 'Daily'. The 'Start Date & Time' is '07/13/2018 3:38 PM'. The 'End Date' is empty, with a note that the default is one year from the start date.

5. Click the paper with paper clip to download an excel file or the printer to print the report.



6. Look at the results to see if the client received their message or not.
7. Repeat the process but select 'Text' instead of 'Voice' message.

Sent Time	Appt Date	Appt Time	Language	Message Group	Clinic	Results
07/12/2018 10:56AM	07/13/2018	01:00 PM	English	Appointment Reminder - Certification	Native Health WIC at 16th St.	answered
07/12/2018 10:56AM	07/13/2018	10:15 AM	English	Appointment Reminder - Certification	Sacaton WIC Clinic	answered
07/12/2018 10:56AM	07/13/2018	09:00 AM	English	Appointment Reminder - Certification	Native Health WIC Dunlap Clinic	voicemail
07/12/2018 11:56AM	07/13/2018	08:30 AM	English	Appointment Reminder - Certification	Sacaton WIC Clinic	no-answer

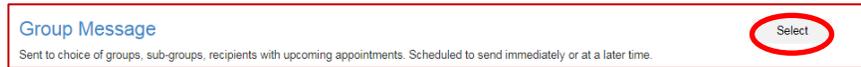
8. Compare the two reports to ensure that the client received a message. Follow-up with clients that did not receive a message by calling or emailing. Send a reminder postcard to clients that did not receive a missed appointment reminder.

Create a Messages- for situations that affect a group of people

1. Go to 'Messages'
2. Go to 'Create'



3. Click 'Select' for 'Group Message'



4. **Properties**- Name your message and make sure to check if you want a Text, Voice, or both messages to be sent. Click 'Add Additional Languages' to send a message in Spanish, as well as English.

The screenshot shows the 'Properties' step of the message creation process. The 'Name' field contains 'Baby Shower'. The 'Languages' section has 'English' and 'Spanish' selected, with 'Spanish' circled in red. The 'Message Type' section has both 'Text' and 'Voice' checked, with the checkboxes circled in red.

5. **Contents** – It will take you to the Text message box.

- **Text:** Type the text message you'd like to send. If you'd like clients to respond in a particular way, include that in your message and add auto-responses. To do so:
 - Click 'Add Auto Response' and (1) enter what you'd like them to text back, (2) what that response stands for, (3) a response you'd like them to automatically receive (optional), (4) click the 'Include in Chat' box if you need to respond. See the example below

The screenshot shows the 'Main Text Message Script' form. The main message script is: 'Salt River WIC is holding a baby shower for all our pregnant moms, tomorrow, July 14th from 1-3pm. Come join us to meet other soon-to-be moms and for new baby tips and the chance to win prizes! Text C to Confirm. Text M for More Information.' Below the script, there are two auto-response options. The first has 'C' as the reply text, 'Confirm' as the report value, and 'Thanks for confirming! We lo' as the auto response. The second has 'M' as the reply text, 'More Information' as the report value, and 'Our office is located at 1234' as the auto response. The 'Include in Chat' checkbox for the second auto-response is circled in red. An 'Add Auto Response' button is also circled in red.

- **Voice:** Click 'Next' to add a voice message. Click 'Text To Speech' under Audio type. Type your message in the Main Message box.

The screenshot shows the 'Voice Options' form. Under 'Audio Type', 'Text To Speech' is selected and circled in red. Under 'Message Complexity', 'Simple Message' is selected. The 'Main Message' field contains the same text as in the previous screenshot.

- **Spanish:** Click the 'Translate Now' button to translate your messages to Spanish.

Translate Language in draft status automatically with Google Translate

[Translate Now](#)

Components	Status	Text	Voice
English	✔ Complete	Edit	Edit
Spanish	○ Draft	Start	Start

6. **Recipients** – You can send the message to 'All Participants', clients at a specific clinic or field clinic, or sub-group - most likely based on client category.

- You must have the 'All Participants' box checked to Select a Sub-Group or the number of Recipients will be zero. Click the refresh button to see how many recipients there will be the message.
- Click 'Change to a Closing Message' to more easily send the message only to clients with an appointment on a specific day or days.

Select Contact Groups

New Group

All Participants (3327)

Add Filters

Select Clinic:

Select Sub-Groups

Field Name

Client Category:

[Remove](#) [Add](#)

Add Contacts

Receive Notifications for this Message

Change to a Closing Message

Number of Recipients: 892 [Refresh](#)

All Partic... x

Appointment Time Range

Change to a Group Message

From:

To:

Add Filters

Select Clinic:

Select Sub-Groups: [Add](#)

7. Responses to messages you sent will show-up on your Dashboard Inbox. If you'd like to look at only responses to the message you sent, locate your message name on the Summary tab. Click the 'View Report' button and select 'Responses'. You can select 'Messages' to see all the clients who were sent the message and whether they received it or not.

Message Activity [Refresh](#)

[Summary](#) [Inbox](#) [Outbox](#)

✔	Missed Appointment Sent on 11:00 AM, Jul 13	20 Texts	28 Calls	3 Replies	View Report
✔	Appointment Reminder - Client physica... Sent on 11:00 AM, Jul 13	23 Texts	29 Calls	7 Replies	View Report

Messages
Responses