Teletask Basics

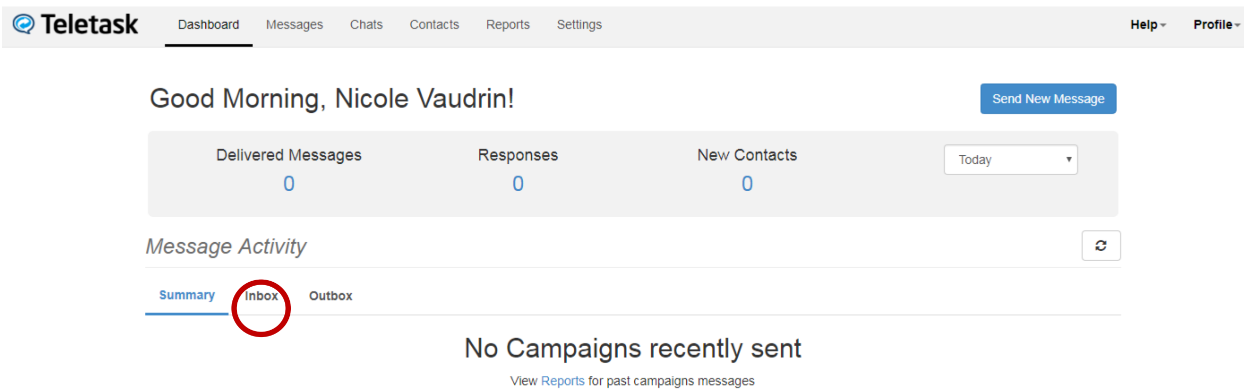
***If you have any issues with Teletask, please call Nicole at (602) 307-1508**

Log-In

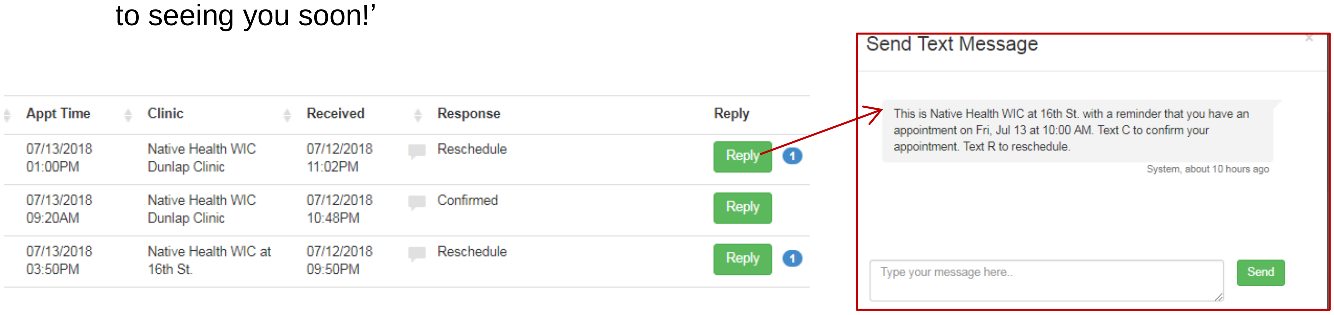
- Access the site at https://hms.teletask.com

Chats – Client Responses to Appointment Reminders

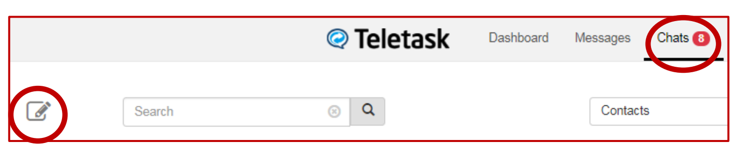
1. From the Dashboard, look at 'Message Activity' and click on 'Inbox'. You will see all messages sent from clients to you.



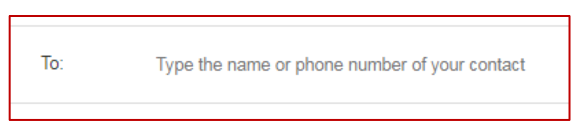
2. Click 'Reply' to respond to the message received. **Note:**
   - The name listed is for the client not the caregiver.
   - The client's appointment time and time the messages was received is listed.
     - Reply within one business day of receiving the message.
     - Set reminders to check messages 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!'

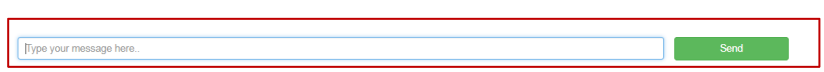


Chats – Staff Initiated



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

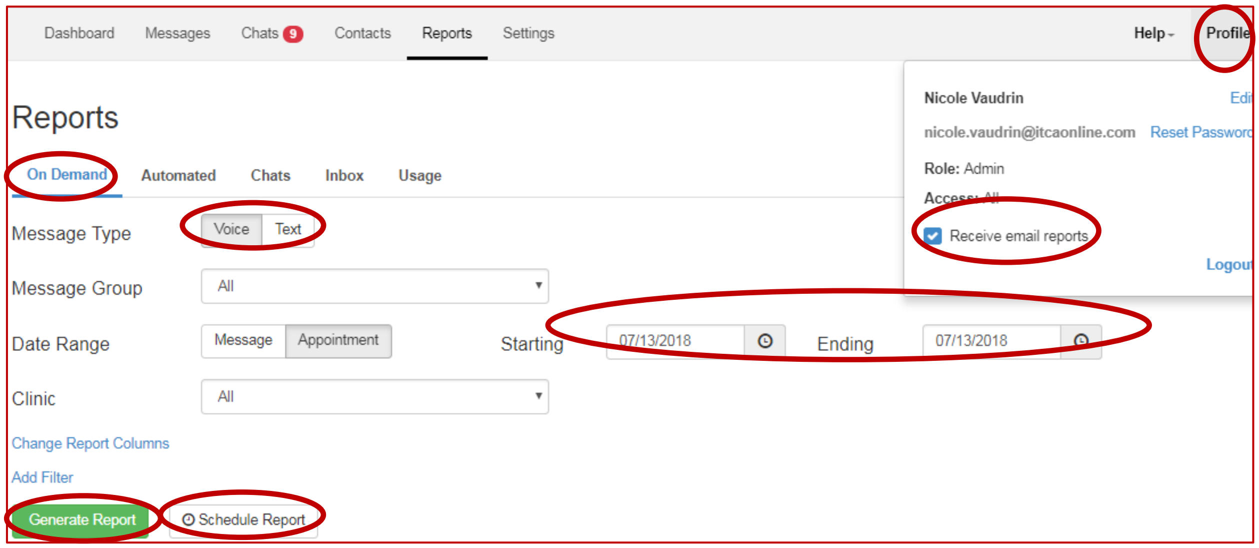




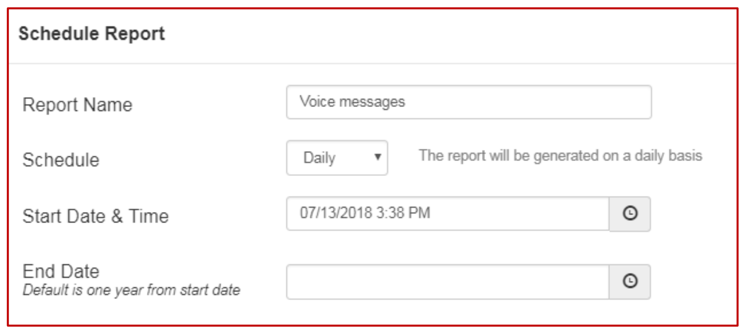
Reports – Client Follow-up

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’



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



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.

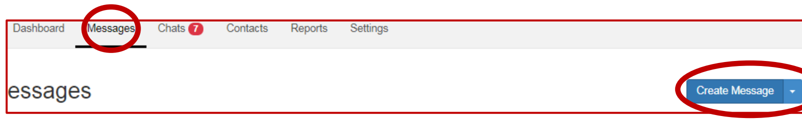
7. Repeat the process but select ‘Text’ instead of ‘Voice’ message.

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 11:58AM	07/13/2018	08:30 AM	English	Appointment Reminder - Certification	Sacaton WIC Clinic	no-answer

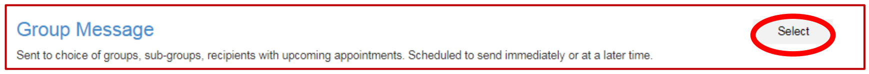
8. Compare the two reports to ensure that the client received a message. Follow-up with clients that did not receive a message by calling or emailing. Send a reminder postcard to clients that did not receive a missed appointment reminder.

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

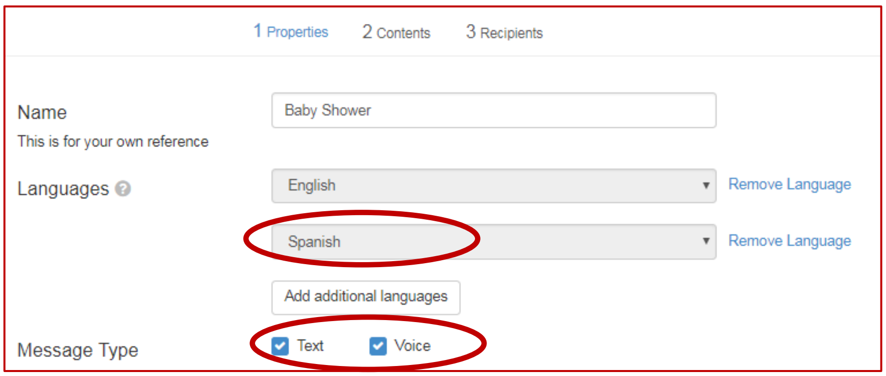
1. Go to 'Messages'
2. Go to 'Create Messages'



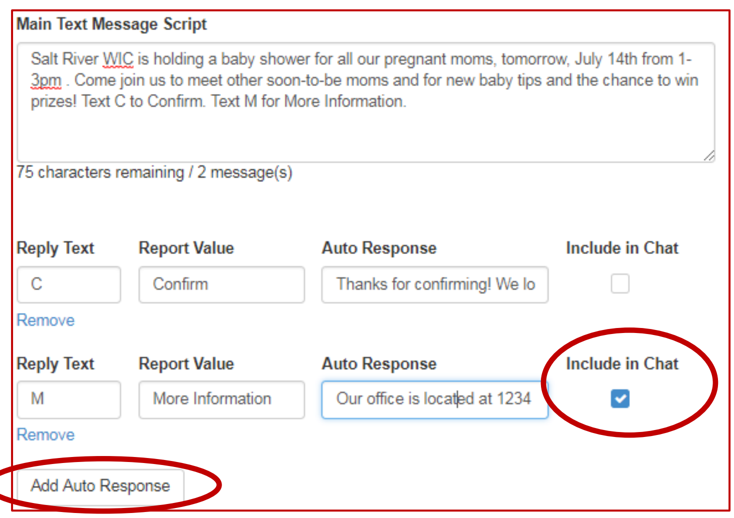
3. Click 'Select' for 'Group Message'



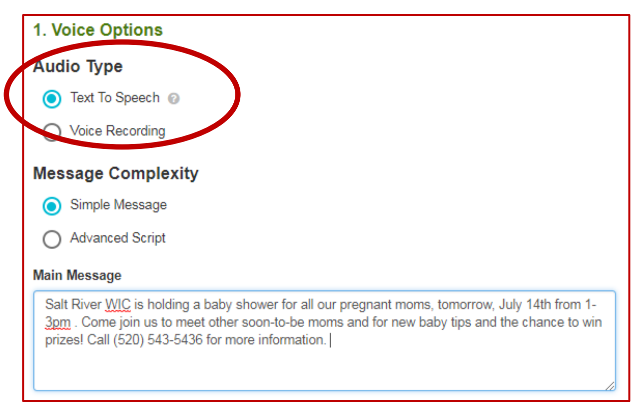
4. **Properties**- Name your message and make sure to check if you want a Text, Voice, or both messages to be sent. Click 'Add Additional Languages' to send a message in Spanish, as well as English.



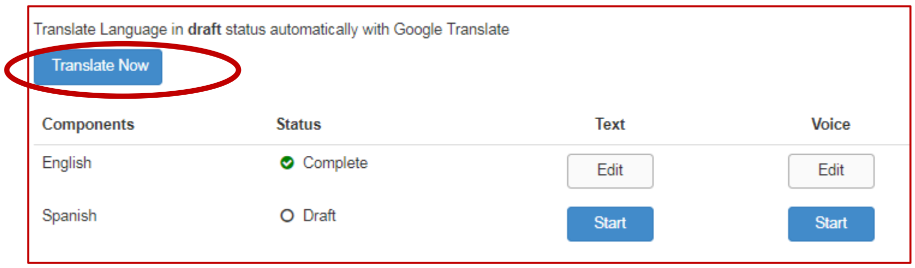
5. **Contents** – It will take you to the Text message box.
   - **Text:** Type the text message you'd like to send. If you'd like clients to respond in a particular way, include that in your message and add auto-responses. To do so:
     - Click 'Add Auto Response' and (1) enter what you'd like them 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



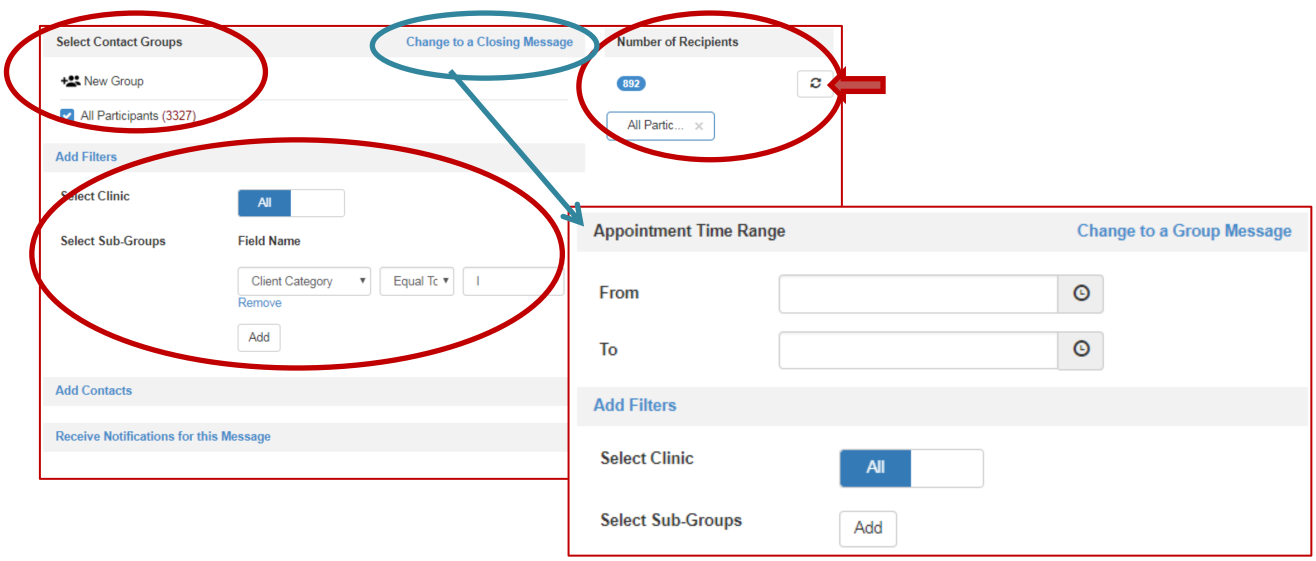
   - **Voice:** Click 'Next' to add a voice message. Click 'Text To Speech' under Audio type. Type your message in the Main Message box.



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



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.



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.