

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.

The screenshot shows the Teletask dashboard with navigation tabs for Dashboard, Messages, Chats, Contacts, Reports, and Settings. A 'Good Morning, Nicole Vaudrin!' greeting is at the top. Below it are statistics for Delivered Messages (0), Responses (0), and New Contacts (0). A 'Message Activity' section has tabs for Summary, Inbox (highlighted with a red circle), and Outbox. Below the tabs, it says 'No Campaigns recently sent' with a link to 'View Reports for past campaigns messages'.

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

The 'Send Text Message' dialog box shows a received message: 'This is Native Health WIC at 16th St. with a reminder that you have an appointment on Fri, Jul 13 at 10:00 AM. Text C to confirm your appointment. Text R to reschedule.' Below the message is a text input field with the placeholder 'Type your message here...' and a 'Send' button.

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

The screenshot shows the Teletask interface with the 'Chats' tab highlighted with a red circle. A pencil & paper icon is also highlighted with a red circle. Below the navigation bar is a search bar and a 'Contacts' button.

To:

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 profile dropdown, the 'Receive email reports' checkbox 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, 'Daily' in the 'Schedule' dropdown, and '07/13/2018 3:38 PM' in the 'Start Date & Time' field. The 'End Date' field is empty with a note 'Default is one year from start date'.

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



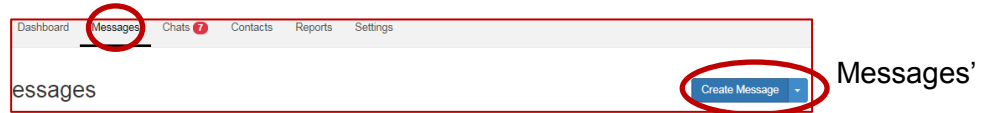
6. Look at the results to see if the client received their message or not.
7. Repeat the process but select 'Text' instead of 'Voice' message.

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

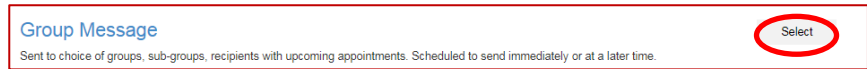
8. Compare the two reports to ensure that the client received a message. Follow-up with clients that did not receive a message by calling or emailing. Send a reminder postcard to clients that did not receive a missed appointment reminder.

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.

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.

Translate Language in draft status automatically with Google Translate

Translate Now

Components	Status	Text	Voice
English	✔ Complete	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
Spanish	○ Draft	<input type="button" value="Start"/>	<input type="button" value="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: Equal To: I

Add Contacts

Receive Notifications for this Message

Change to a Closing Message

Number of Recipients: 892

All Partic... x

Appointment Time Range Change to a Group Message

From:

To:

Add Filters

Select Clinic:

Select Sub-Groups:

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

Summary

<input checked="" type="checkbox"/>	Missed Appointment Sent on 11:00 AM, Jul 13	20 Texts	28 Calls	3 Replies	<input type="button" value="View Report"/>
<input checked="" type="checkbox"/>	Appointment Reminder - Client physica... Sent on 11:00 AM, Jul 13	23 Texts	29 Calls	7 Replies	<input type="button" value="View Report"/> <ul style="list-style-type: none"> Messages Responses