www.AppointmentReminders.com
Setup

Switch to New Schedule
1) Follow steps outlined to convert to 8 column max schedule.
2) Run using the new schedule software for a few days.

Set up Export Location for Interfaces
1) Open Scheduling use top toolbar "Tools", "Appointment Reminders", " Export Reminders CSV"
2) Create Export and Import Paths, i.e.
   H:\ApptReminders\Exports & H:\ApptReminders\Imports
3) Use top toolbar "Tools", "Edit Export Path Name"
   Fill in "H:\ApptReminders\Exports\" and save it
4) Exit "Appointment Reminders CSV" window

Set up Import Location for Interface
1) Open Scheduling top toolbar "Tools", "Appointment Reminders", "Import Confirmations CSV"
2) Use top toolbar "Tools", "Edit Imports Path"
   Fill in "H:\ApptReminders\Imports\"
3) Exit "Marked Confirmed …" window

Upload Active Patient Information
1) Reports Menu, Patient Search by Criteria
2) Set Criteria to a range of what you consider active patients and run the report.
3) Advanced Utilities, Export Patients
4) Check "AppointmentReminders.com" option and run Export
5) Import Contacts to www.appointmentreminders.com

Setup Scheduling Options
Have **Date Tec Assist** you on setting these options:
1) Top of Schedule select toolbar "Utilities", "Utility Options Menu", "Set Scheduling Options", check "www.appointmentreminders.com" and "Prompt for Phone Number when Appointing"

Setup Add New Patient Options

1) On the Scheduling screen open Scheduling Small Add New Patient Window, select "Tools", "Options", check "Require Home and/or Cell Phone".
2) From the Primary Menu, select Utility Menu, then "New Patient Defaults", check the option "Require Home and/or Cell Phone Number".

Automatically Schedule Uploads & Confirming Appointments

1) Set up two batch files in C:\NetMenu folder

SendApptReminders.bat
==
C:\EZW\SCHED2\PGMS\ApptRemind.exe AUTO/UNCONFIRMED

ReceiveConfirms.bat
==
C:\EZW\SCHED2\PGMS\MarkedConfirmed.exe AUTO

2) Set up Windows Scheduler to run the batch files periodically. Recommend every hour during working hours.

3) Set Scheduling Option Use www.appointmentreminders.com

4) Set up www.appointmentreminders.com auto program to run Typically every ½ hour

Notes:
1. At the time you make an appointment in the schedule the info is exported automatically for ApptReminders (it will typically set be picked up every ½ hour)
2. Different Messages are sent to the patient depending upon if they are a new or established patient.
3. Different Messages are sent to the patient if they have Pre-Medication indicated on their record or not.
4. If you cancel (even using Human Error) or move an appointment the info is exported automatically for ApptReminders (it will typically be set to picked up every ½ hour)