

Chapter 4: Appointment Scheduler
Section 9: Auto Dialer Basics
Lesson: Auto Dialer Extract File

Objectives:

Upon completion of this lesson, users will be able to:

- locate the Auto Dialer extract screen in TWIST;
- choose a file location on the computer in which to save the extract file each day;
- determine the selection criteria for extracting appointment data ;
- locate the Auto Dialer extract file in the saved location;
- read the data printed to the Auto Dialer extract file; and
- run and interpret Auto Dialer reports.

Oregon Policies:

- ◆ 606 TWIST Minimum Scheduler Usage

Overview:

The Auto Dialer is an automated voice message system used to make appointment reminder phone calls to WIC participants. Produced by a company called Teletask, the Auto Dialer consists of both specialty hardware (Auto Dialer board) and software.

The Auto Dialer software is separate from the TWIST and FamilyNet applications. The TWIST database and Auto Dialer communicate using what is called an “extract file”. The extract file, generated by the user, is a text (.txt) file consisting of extracted data elements from TWIST that the Auto Dialer uses to place reminder and follow-up phone calls.

This lesson will provide an overview of the extract file in relation to TWIST.

Questions about how to use the Auto Dialer and related software, including running reports, should be directed to Teletask at (888) 484-9911 x103.

Instruction:***TWIST Fields Used In The Auto Dialer Extract File***

There are several fields in TWIST that the Auto Dialer Extract File pulls data from in order to place phone calls to WIC participants. Therefore, it is essential that WIC Program staff take special care and attention when updating or modifying these TWIST fields. Following is a list of all TWIST data exported to the extract file.

- **“Address”** field from Client Master Demographics
- **“Telephone”** field from Client Master Demographics: extract will pull only home, cell, and message phone types – in that order.
- **“Spoken Language”** field from Client Master Demographics: English (EN), Spanish (SP), Vietnamese (VI), and Russian (RU). All other languages default to English.
- **“WIC ID#”** - temporary IDs included. This field is also used to associate multiple family member appointments so that families only receive one phone call even if multiple family members have appointments in that clinic on that day.
- **“May We Contact You By Phone”** field from WIC Intake. Auto Dialer will call the participant only if the answer is set to “Yes” or null (blank). Auto Dialer will not call if this is set to “No”.
- **“Client/Family Appointment Date and Time”** from Appointment Scheduler.
- **“Clinic”** field from Appointment Scheduler.
- **“Appointment Status”** field from Appointment Scheduler: extract pulls only “Booked” appointments for future reminders and “No Show” appointments for missed appointments.

The Auto Dialer Extract Screen

1. The starting point for this lesson is:
Appointment Scheduler ⇒ Scheduling ⇒ Auto Dialer Extract

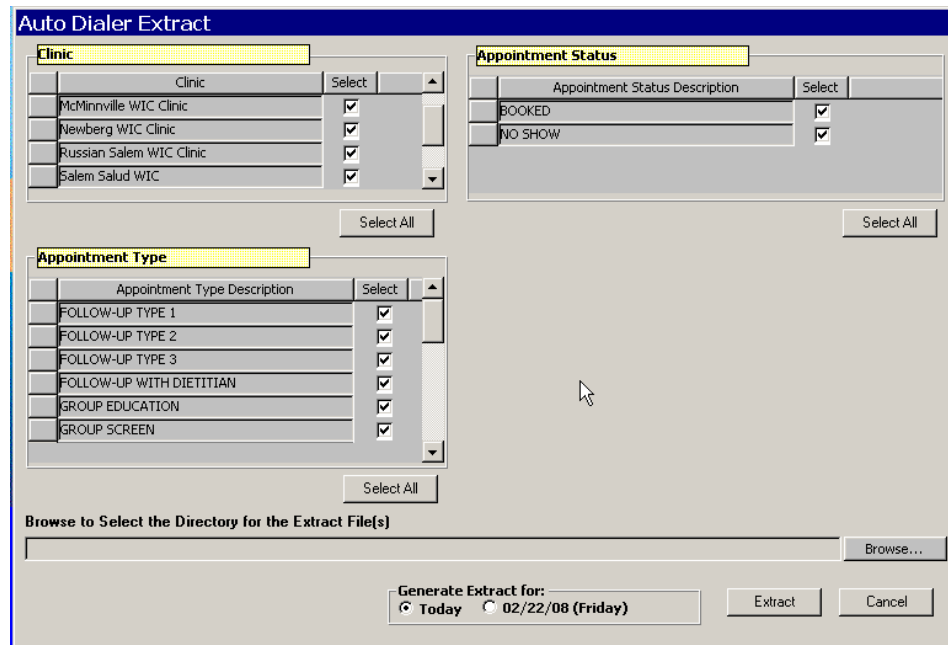


Figure 1: “Auto Dialer Extract ” Window

Auto Dialer Extract Selection Criteria

- In WIC the Auto Dialer is used to place two types of phone calls:
 - Reminder phone calls for Booked (future) appointments; and
 - Follow-up phone calls for No Show (missed) appointments.
- The “Appointment Status” selection criteria allow the user to select which appointment statuses to extract data and place phone calls for. You can extract data for Booked appointments (generates a text file denoted by the date and the letter A) or No Show appointments (generates a file denoted by the date and the letter M) or you can click the “Select All” button to extract data for both types.

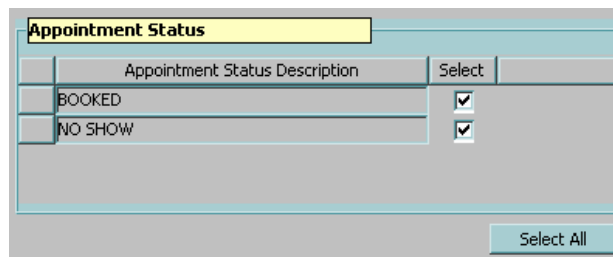


Figure 2: “Appointment Status” Selection Criteria

- The “Appointment Type” selection criteria allow the user to select which appointment types to extract data and place phone calls for. For example, you can elect to make appointment reminder calls for specific appointment types or you can click the “Select All” button to extract data for all appointment types.

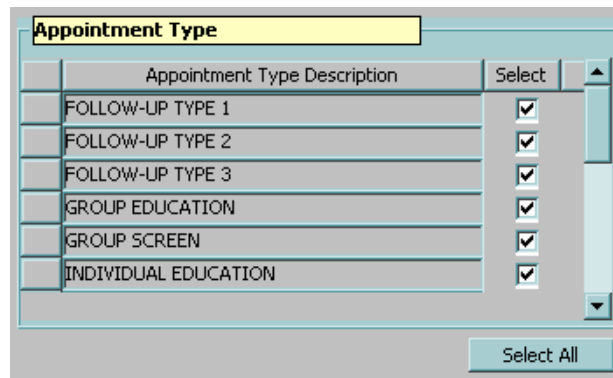


Figure 3: “Appointment Type” Selection Criteria

- The “Clinic” selection criteria allows the user to select which clinic(s) to place phone calls for a particular day. You can click the “Select All” button to extract appointment data for all clinics.

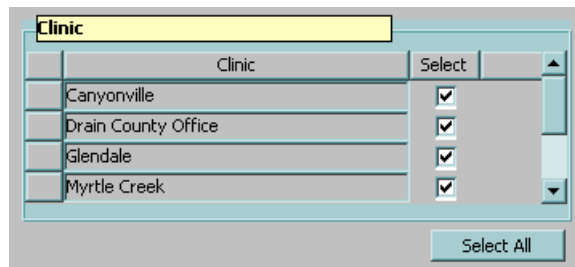


Figure 4: “Clinic” Selection Criteria

NOTE: The default for the selection criteria is “All”. However, once the user changes the selection criteria, that change will stay in effect for the next Auto Dialer extract files until the user again changes the criteria selected.

- The extract file will extract only the earliest appointment if there are multiple family members scheduled for the same date and clinic. For more detail on this process, see the section on Reading the Auto Dialer Extract Text File.

- The “Extract” file pulls information from the clinic schedule for Booked and No Show appointments, depending on the day selected for the Auto Dialer extract file to run. Selecting the “Today” button will run the file for today’s day of the week according to the list below. The other button will show the next weekday following today and will run the file for that day according to the list below. This allows you to run the auto dialer when you are out of the office on a given day.

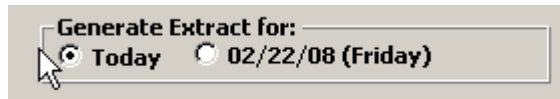


Figure 5: “Generate Extract for:” Selection Criteria

- Monday’s file: booked appointments for Wednesday and Friday’s no shows
- Tuesday’s file: booked appointments for Thursday and Monday’s no shows
- Wednesday’s file: booked appointments for Friday and Tuesday’s no shows
- Thursday’s file: booked appointments for weekend and Monday, no shows from Wednesday
- Friday’s file: booked appointments for Tuesday and Thursday’s no shows

Selecting A Place To Save The Auto Dialer Extract File

- The first time you open the “Auto Dialer Extract” Screen TWIST will prompt you to choose a folder in which to save the “Extract” file. This can be in any drive and folder of your choice as long as you know where and how to locate the “Extract” file at a later time.

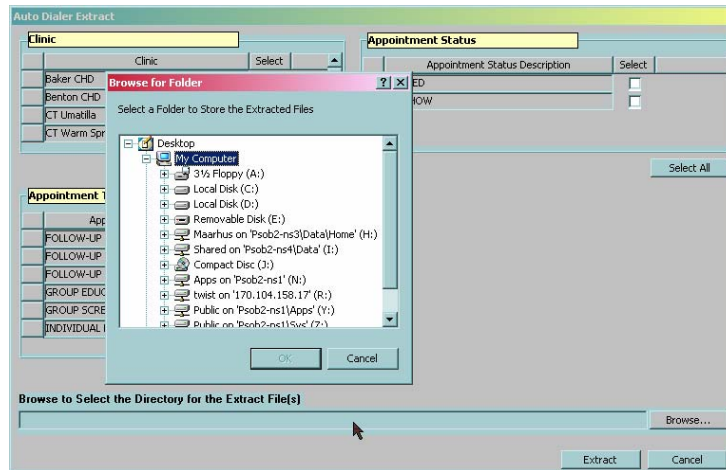


Figure 5: “Browse for Folder” Screen

2. **To choose the folder, expand the drive of your choice by clicking the plus icon (+) next to the drive. Keep expanding the files until you find the folder you would like to save the Extract file to.**
3. **Select your chosen folder by clicking on it and then click the “OK” button.**
4. **When you have chosen a folder, the path will show in the “Browse to select the Directory for the Extract File(s)” field.**



Figure 6: “Browse to Select the Directory for the Extract File(s)” Field

Running the Auto Dialer Extract File

1. **Once you have selected the desired file path and the criteria for the extract file, click on the “Extract” button on the bottom of screen.**

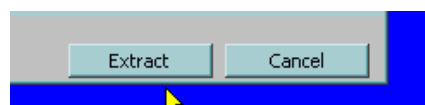


Figure 7: “Extract” Button

- The file(s) will be extracted according to the criteria, and a pop-up will indicate how many booked and how many no show appointments were extracted. These numbers reflect how many calls Auto Dialer will make.

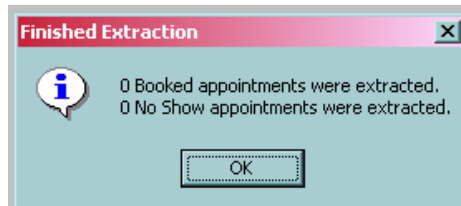
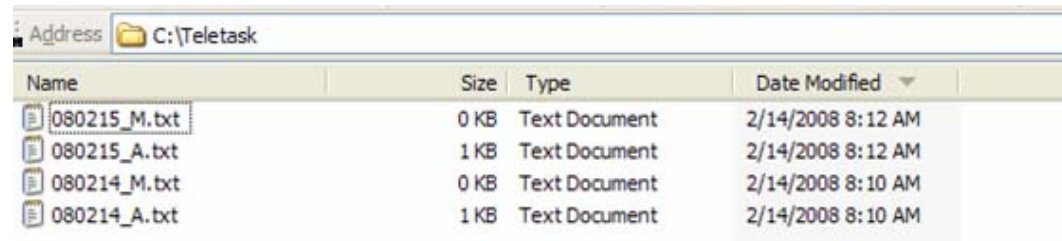


Figure 8: “Finished Extraction” Pop-up

When To Run The Auto Dialer Extract File

The Auto Dialer Extract File must be run for each day that you plan to use the Auto Dialer to make phone calls. The Extract file automatically names the text files the with the date and either the A (for booked appointments) or M (for missed or no-shows) each time the Extract is run and overwrites any previous file. If you forget to extract the current day’s appointment data, however, the Auto Dialer will not make phone calls to clients who were already called on a previous day.



Name	Size	Type	Date Modified
080215_M.txt	0 KB	Text Document	2/14/2008 8:12 AM
080215_A.txt	1 KB	Text Document	2/14/2008 8:12 AM
080214_M.txt	0 KB	Text Document	2/14/2008 8:10 AM
080214_A.txt	1 KB	Text Document	2/14/2008 8:10 AM

Figure 9: Extract File Names

If you wish to keep a record of the extract files, you can either rename them before extracting again or move the previous file to a new directory so that it is not copied over with new appointment data.

Reading the Auto Dialer Extract Text File

The file generated by the Auto Dialer Extract is a .txt or text file. Text files can be opened with word processing software such as Microsoft Word and Corel WordPerfect, as well as the Windows applications Notepad and WordPad.

The data extracted from TWIST appears as a string of text and spaces in the file. Each line of text contains data from one WIC participant's record. Data is stored in the following format and order within the file.

1. WIC ID #

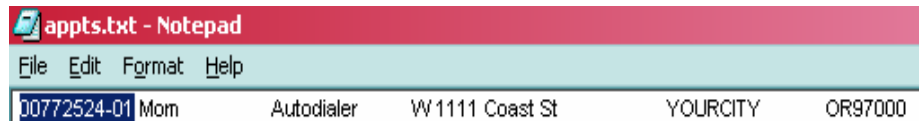


Figure 10: WIC ID # Field in Auto Dialer Extract

2. Participant First and Last Name

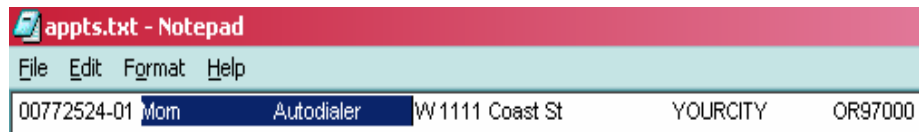


Figure 11: Participant First and Last Name Field in Auto Dialer Extract

3. Address

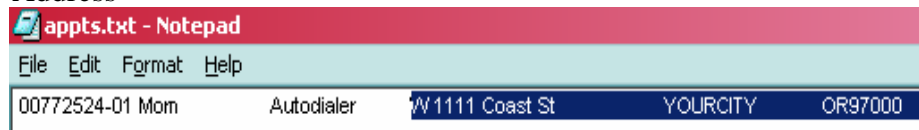


Figure 12: Address Field in Auto Dialer Extract

4. Participant Date of Birth

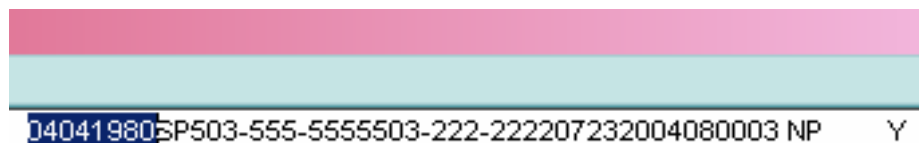


Figure 13: Participant Date of Birth Field in Auto Dialer Extract

5. Spoken Language

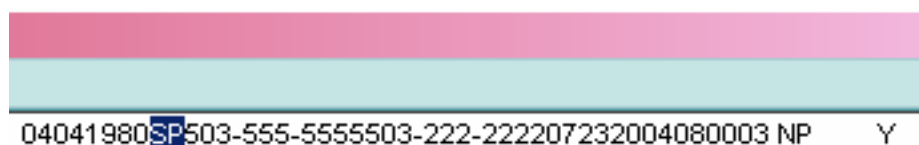
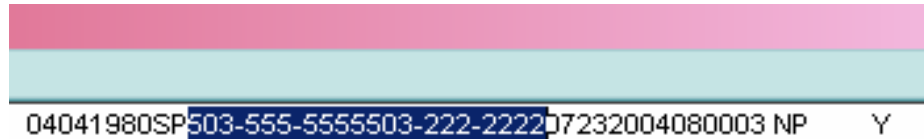


Figure 14: Spoken Language

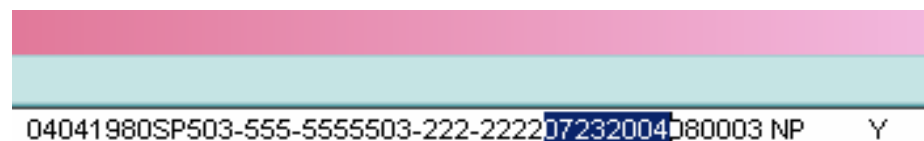
6. Phone Numbers – Primary and Alternate



04041980SP503-555-5555503-222-222207232004080003 NP Y

Figure 15: Phone Numbers Field in Auto Dialer Extract

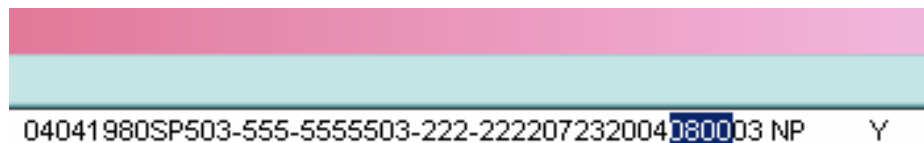
7. Appointment Date



04041980SP503-555-5555503-222-222207232004080003 NP Y

Figure 16: Appointment Date Field in Auto Dialer Extract

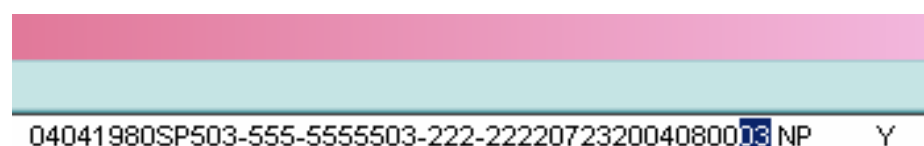
8. Appointment Time



04041980SP503-555-5555503-222-222207232004080003 NP Y

Figure 17: Appointment Time Field in Auto Dialer Extract

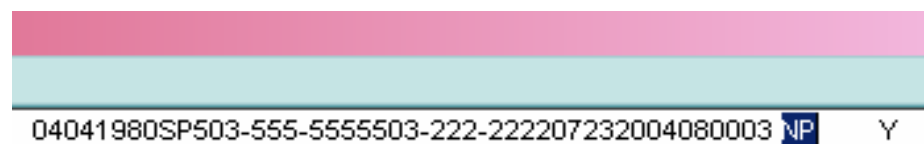
9. Clinic Code



04041980SP503-555-5555503-222-222207232004080003 NP Y

Figure 18: Clinic Code Field in Auto Dialer Extract

10. Appointment Type



04041980SP503-555-5555503-222-222207232004080003 NP Y

Figure 19: Appointment Type in Auto Dialer Extract

11. Multiple Family Member Appointments

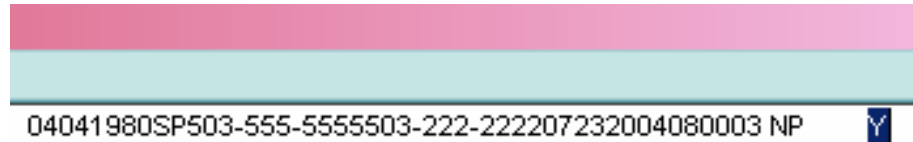


Figure 20: Multiple Family Member Appointments Field in Auto Dialer Extract

NOTE: The Auto Dialer only places one phone call per family per day. The purpose of the Multiple Family Member Appointments field is to communicate to the Auto Dialer whether more than one member of this family has an appointment in the clinic on that day. Only the family member with the earliest appointment in the day will be listed in the extract file. For example, a mother and baby each have an appointment in the same clinic on the same day. Only one call will be placed to that family and the person with the earliest appointment will be the only one listed in the extract file. The string of extracted text for this family member will have a “Y” in the Multiple Family Member field.

One exception to this is if the user, via the Auto Dialer Extract selection criteria, elects to only place calls for certain appointment types and each family member has a different appointment type. For example, a woman has an NP appointment scheduled and her child has an RC appointment type scheduled in the same clinic on the same day. If the user elects to only place reminder calls to NP appointment types, the woman’s data will appear in the extract file and the Multiple Family Member Appointments will be null (blank). This could also potentially cause a problem with clinic flow if the woman’s appointment time was later than her child’s appointment time.