Crossroads Teletask Auto Dialer Instructions: Appointment Reminders by TEXT MESSAGE or VOICE CALL

The North Carolina (NC) Nutrition Services Branch (NSB) is partnering with Teletask to provide auto dialer services to local agencies. Teletask sends appointment reminders by text message or voice call to WIC participants using data from the Telephone Numbers container and Preferred Method of Contact field on the Family Demographics screen in Crossroads.

🌿 IMPORTANT: Appointment reminders will automatically be sent to participants as a text message; should the text be rejected (for example, if the device does not support texting), the system will then send a voice call. Participants cannot choose to have a voice call versus a text message or to have both options. They will receive either a text message or a voice call depending on their device.

Steps to set up Auto Dialer in the local agency:
1) Ask all participants who present for services if they would like to receive appointment reminders by text message. Explain to them that if their phone device does not support texting, then they will receive a voice call instead.
   Note: If an applicant calls to schedule an Initial Certification appointment, the local agency can offer the Phone option for Preferred Method of Contact. If a participant is being added to an established WIC family by phone, be sure to update the Preferred Method of Contact to Phone BEFORE adding the participant on the Family Demographics screen. Otherwise, Proof of Residence and Voter Registration fields will reset to blank and require input to save the screen. DO NOT update Preferred Method of Contact over the phone for any other appointment types.

2) If the participant would like to receive appointment reminders by text message (voice call, if necessary), complete the following information on the Family Demographics screen:
   - Telephone Number [update if needed]. Additional telephone numbers may be added if needed.
   - Type [update if needed]
   - Select the Primary button to indicate preferred number if more than one [update if needed]
   - Select the Text and Auto Dialer box on the same row as the Primary number
   - Select Preferred Method of Contact: Phone
   - Do NOT use the Confidentiality box
   - Update the Language Spoken if needed. NOTE: Language Spoken determines the language of the text message or voice call appointment reminder. If the language spoken is anything other than Spanish, the text message or voice call appointment reminder will be in English.
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Local agencies do NOT need to complete any other steps or inform the NSB if they choose to use the Auto Dialer. Crossroads sends a file of participants with scheduled appointments, Preferred Method of Contact = Phone and the Auto Dialer box checked to Teletask using a state-wide nightly batch process.

Reminder text messages or voice calls in English or Spanish are made two days in advance of appointments. The schedule of calls is shown below:

<table>
<thead>
<tr>
<th>Day of Appointment</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Monday</th>
<th>Tuesday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Calls made at</td>
<td>Mon at 10AM</td>
<td>Tue at 10AM</td>
<td>Wed at 10AM</td>
<td>Thu at 10AM</td>
<td>Sat at 10AM</td>
<td>Sun at 10AM</td>
</tr>
</tbody>
</table>

Text Appointment Reminder Template in ENGLISH

Hello, your WIC appointment is scheduled on <Appointment Day> <Appointment Date> at <Appointment Time> @ <Clinic Name> location. Should you need to reschedule, please call <Clinic Phone Number> during office hours.

Text Appointment Reminder Template in SPANISH

Hola, su cita de WIC está programada para <Appointment Day> <Appointment Date> a las <Appointment Time> en la ubicación de <Clinic Name>. Si necesita reprogramar su cita, por favor llame a <Clinic Phone Number> durante el horario de oficina.

Telephone Appointment Reminder Template in ENGLISH

Hello, your WIC appointment is scheduled on <Appointment Day> <Appointment Date> at <Appointment Time> at the <Clinic Name> location. Should you need to reschedule, please call <Clinic Phone Number> during office hours. We look forward to seeing you on <Appointment Day> <Appointment Date> at <Appointment Time>.

Telephone Appointment Reminder Template in SPANISH

Hola, su cita de WIC está programada para <Appointment Day> <Appointment Date> a las <Appointment Time> en la ubicación de <Clinic Name>. Si necesita reprogramar su cita, por favor llame a <Clinic Phone Number> durante el horario de oficina. Esperamos verlo el <Appointment Day> <Appointment Date> a las <Appointment Time>.

EXAMPLE:
Hello, your WIC appointment is scheduled on Monday, November 5th at 1 PM at the Wake Millbrook Road location. Should you need to reschedule, please call 919-250-4720 during office hours. We look forward to seeing you on Monday, November 5th at 1 PM.

- The content of the Appointment Reminder template, as shown above, cannot be modified by the local agency.
- The name of the participant and the appointment type will not be included in the appointment reminder message.
- The Clinic Name and Clinic Phone Number are generated from the Clinic Setup screen in Crossroads.
  - IMPORTANT: The Clinic Name is the location of the family NOT the location of the appointment! If the family location and the appointment location do not match, TRANSFER the family to the clinic where the appointment has been made.
  - If the Clinic Name and/or Clinic Phone Number has changed from initial Crossroads setup, the local agency must call the NSB Customer Service Desk with updated information.
Additional Information about Auto Dialer

- Participants cannot reply to the one-way reminder text messages
- Automated appointment reminders will be sent for all scheduled appointment types except for Nutrition Education classes.
- If there are multiple appointments scheduled for a family on the same date, only ONE reminder will be sent. The reminder will be made for the earliest appointment time.
- Auto Dialer will NOT be used for Missed Appointment Notifications. Local agencies are still required to provide missed appointment notifications for Initial and Subsequent Certifications. The process for printing missed appointment notifications for families with a Preferred Method of Contact: Phone is listed below.
- Appointment reminder text messages will have the caller ID: 888-987-9725. Please share this number with participants so they can add the number to their contacts.
Printing Missed Appointment Notifications for Families with Preferred Method of Contact: Phone

1) In Crossroads, navigate to Operations > Notifications
2) Enter the following Search Criteria:
   - Communication Method: Phone
   - Appointment Date From and To for desired date ranges
   - Appointment Status: Missed
3) Click Search. Search Results Container populates as shown below.

![Search Criteria](image)

4) Uncheck Phone and check Print for each Missed Appointment Notification you would like to print.
5) Select Print Mailing Labels?: Yes or No
6) Click Complete Communications. Missed Appointment Notifications will print and a Status Message of successful will pop up.