

## Crossroads Teletask Auto Dialer Instructions

The North Carolina (NC) Nutrition Services Branch (NSB) is partnering with Teletask to provide auto dialer services to local agencies. Teletask uses Crossroads functionality to send appointment reminders by telephone to WIC participants. Local agencies must update the **Telephone Numbers** container and **Preferred Method of Contact** field on the **Family Demographics** screen for the process to work correctly.

### 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 telephone.  
**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 telephone, 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 **Auto Dialer** box on the same row as the **Primary** number
  - Select **Preferred Method of Contact: Phone**
  - Update the **Language Spoken** if needed. **NOTE: Language Spoken** determines the language of the telephone appointment reminder. If the language spoken is anything other than Spanish, the telephone appointment reminder will be in English.

The screenshot displays the 'Family Demographics' screen in the Crossroads system. On the left, the 'Telephone Numbers' section contains a table with the following data:

Telephone Number	Type	Primary	Do not call	Auto Dialer	Text	Carrier
919-555-1212	Home	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

On the right, the 'Preferred Method of Contact' dropdown menu is set to 'Phone'. Other fields like 'Language Spoken' are set to 'English'. The 'Auto Dialer' checkbox in the table is highlighted with a black box, as is the 'Preferred Method of Contact' dropdown.

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.

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Reminder calls in English and Spanish are made two days in advance of appointments. The schedule of calls is shown below:

<b>Day of Appointment</b>	Wednesday	Thursday	Friday	Saturday	Monday	Tuesday
<b>Phone Calls made at</b>	Mon at 10AM	Tue at 10AM	Wed at 10AM	Thu at 10AM	Sat at 10AM	Sun at 10AM

Appointment Reminder Template in ENGLISH	Appointment Reminder Template in SPANISH
<p>Hello, your WIC appointment is scheduled on &lt;Appointment Day&gt; &lt;Appointment Date&gt; at &lt;Appointment Time&gt; at the &lt;Clinic Name&gt; location. Should you need to reschedule, please call &lt;Clinic Phone Number&gt; during office hours. We look forward to seeing you on &lt;Appointment Day&gt; &lt;Appointment Date&gt; at &lt;Appointment Time&gt;.</p>	<p>Hola, su cita de WIC está programada para &lt;Appointment Day&gt; &lt;Appointment Date&gt; a las &lt;Appointment Time&gt; en la ubicación de &lt;Clinic Name&gt;. Si necesita reprogramar su cita, por favor llame a &lt;Clinic Phone Number&gt; durante el horario de oficina. Esperamos verlo el &lt;Appointment Day&gt; &lt;Appointment Date&gt; a las &lt;Appointment Time&gt;.</p>

### 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 5<sup>th</sup> 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. 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

- 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 telephone message will be sent. The call 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.

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### 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
?

**Communication Method**

Mail

E-Mail / Text

Phone

**Appointment**

**Appointment Date**

**From**

**To**

**Appointment Type**

**Appointment Status**

**Family**

**Family ID**

**Family Last Name**

▼ Search Results
?

▼ Appointment Communications - Search Results
Total Items: 5

	E-mail/Text	Print	Phone	Family ID	Parent / Guardian Name	Preference	Appointment Type	Appointment Date	Appointment Status	Attachments
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004375	Alice Champion	Phone	Subsequent Certification	09/14/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004384	Melissa Marmot	Phone	Subsequent Certification	09/11/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004403	Barbara Boston	Phone	Mid-Certification Assessment	09/12/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004438	Gold Fish	Phone	Initial Certification	09/13/2018	Missed	
✗	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	F00600004438	Gold Fish	Phone	Initial Certification	09/13/2018	Missed	

- 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.