



Patient Reminder Module

Cloud PRM Exporter/Upload Instructions

We recommend running the exporter for the Appointment Reminders and upload the file at least once a day; preferably shortly before the start of your preferred call time range, to maximize call reminder accuracy.

Step 1: Run Exporter to create file (Required Each Time)

From within Practice Manager...

- a) Go to **Add-ins** → **Run** and click '**Exporter - Recalls**' to open the program
- b) Go to **File** → **Open**
- c) Select the '**PatientRECALLReminderExport.px2**' file and click **Open**
- d) Next to the **ScheduleStartDate** field, replace the date with today's date (*unless otherwise specified by STI Staff*)
- e) At the bottom of the screen, sign in using the same **User Name** and **Password** that you use for Practice Manager or Clinical
- f) Click the '**Run Now**' button on the bottom right, to create the file
- g) Once the exporter finishes creating the file, a popup window will come up saying "**Export Complete**", click '**OK**'
- h) The "**PatientReminder.txt**" file is defaulted to save in the following folder on the cloud:
d:\stisuite\practicemanager\prm\patient reminder file\ but if you click Documents you will find a shortcut to the folder so you don't have to browse to it.

Step 2: Upload the File

- a) Go to **Add-ins** → **Run** and click '**Talksoft – Upload File**' to go to the website via the cloud
- b) Enter your **email** and **password** to log in, (*previously emailed to you from STI's Technical Support*)
- c) On the left hand side in the '**Recalls**' section, click on '**Upload File**'
- d) Click **Browse** then choose the file you created: '**PatientRemindertxt**', if the file is not in the browser window, on the left click '**My Documents**' and then double click the '**Patient Reminder File shortcut**', then double click the '**PatientReminder.txt**'
- e) Click **Open** to select
- f) Then click **Upload** to send the file, you will be brought to the transmission page to view the file being processed
- g) To confirm you have uploaded properly, wait a minute and click on '**Transmissions**' on the left under the **Recall** section
- h) If successful, the correct time and date of your uploaded file will appear at the top of the list and will say '**Complete**' and the number of '**Records Processed**' will be greater than zero
- i) Be sure to search the **Activity Report** for reminder results and Have a Great Day! 😊