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## ***Patient Reminder Module***

### **Recall Exporter/Upload Instructions**

We recommend running the exporter for the Recall Reminders and upload the file once a month. Recall reminders will start immediately after uploading the file.

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

*From your desktop...*

- a) Double-click '**Patient Reminder Exporter**' shortcut icon on the desktop
- b) Go to **File** → **Open**
- c) Browse on your desktop to the shortcut called "**Patient Reminder Module**"
- d) Select the '**PatientRECALLReminderExport.px2**' file and click **Open**
- e) Next to the **RecallStartDate** field, replace the date with the starting recall date that you wish to send reminders out for, usually the beginning of the next month, (for example 9/01/2014)
- f) For the **RecallEndDate** field, replace the date with the ending recall date, usually the end date of the next month, (for example 9/30/2014)
- g) At the bottom of the screen, sign in using the same **User Name** and **Password** that you use for Practice Manager or Clinical
- h) Click the '**Run Now**' button on the bottom right, to create the file
- i) Once the exporter finishes creating the file, a popup window will come up saying "**Export Complete**", click '**Ok**'
- j) The "**PatientReminderReport.txt**" file is defaulted to save on your desktop, *(however the folder you save it in can be changed anytime, by changing the path in the field directly above the User Name field)*

#### **Step 2: Upload the File**

*Using Internet Explorer, or any web browser...*

- a) Go to the address line and go to Talksoft's Website: [www.talksoftonline.com](http://www.talksoftonline.com)
- b) Click on '**Customer Login**' at the top right and 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 '**RECALL**' section, click on '**Upload File**'
- d) Click **Browse** and go to the desktop, then choose the file you created: '**PatientReminderReport.txt**'
- e) Click **Open** to select
- f) Then click **Upload** to send the file, you should get a confirmation message on the screen
- 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) Recall reminders will start going out within 15 minutes of uploading
- j) Be sure to search the **Activity Report** for reminder results and Have a Great Day! ☺