

Atlas Chiropractic System

SMS APPOINTMENT REMINDER SYSTEM



A stand alone guide to the proper configuration of the Atlas SMS Appointment Reminder Feature.
Refer to the Atlas Chiropractic User Manual for additional details



Customer Support:

Atlas Support personnel are trained specifically on the Atlas Chiropractic Software. On occasion, they are able to assist with general computer support (networking, antivirus, configuration). Atlas recommends that issues outside of the scope of Atlas Support be directed to the appropriate Support professional. A qualified, onsite IT technician can provide you with the most accurate information to resolve your Technical Issues. Atlas Support may be able to assist your technician in resolving issues regarding your Operating System or System Maintenance, to help facilitate the proper function of Atlas.

Support Contact Information:

Mon-Thur: 8am to 7:30pm EST Fri: 8am to 4:30pm EST

Phone: 1-866-76ATLAS (2-8527)

Fax: 1-705-648-6260

Email: support@atlaschirosys.com

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This manual is designed to explain the features and functions of the Atlas Chiropractic Software.

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SMS (TEXT) APPOINTMENT REMINDERS

Atlas Systems SMS Appointment Reminder feature is available for clinics to effectively communicate with their Patients. There are a few easy steps to complete in order to implement the feature.

NOTE: SMS is available in Atlas Chiropractic Systems software version 3.79.15 and later. To use the SMS feature you must have updated to at least this version, have an active SMS plan with Atlas and have sufficient text credits in your account.

Outline Steps to Setup:

1. Purchase the monthly SMS feature and a texting credit plan
2. Setup Atlas with your account details
3. Start sending SMS confirmations to your Patients

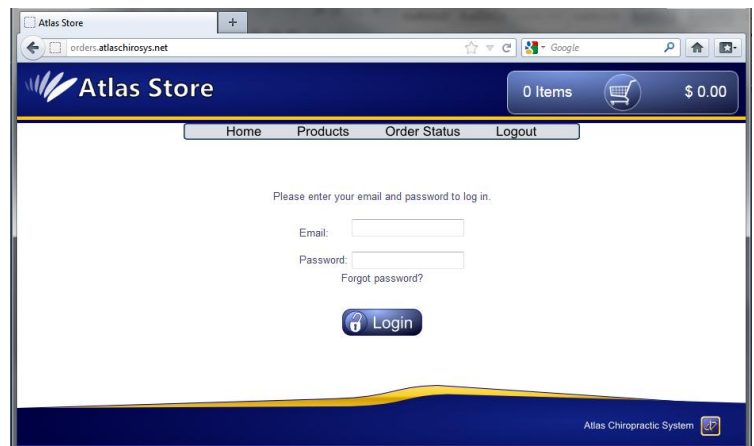
Sign Up for the SMS Feature:

Navigate to our online Order Site in your Internet Browser:

<http://orders.atlaschirosys.net>

OR

From within Atlas, you can click F1 on your keyboard and select the option "Atlas Store" to go directly to the online order system.



Log into the Order Site using the credentials sent to you during your Initial Setup. Typically your log in information is the Providers email address supplied to us during your setup and the Password is your Main Office Phone Number.

NOTE: if these credentials do not work, contact our Support Department via phone (1-866-762-8527) or email (support@atlaschirosys.com) for assistance.

Once in the Order Site, navigate to the PRODUCTS page and click on the SMS FEATURE link.

The SMS Feature includes a monthly service access fee. Once selected and added to your cart, you will need to purchase Text Credits in order to send text messages to your patients. By ordering SMS package, you agree to Atlas billing your account monthly.

After selecting to ADD the SMS Feature to your Cart, the screen will prompt to order a Text Credit Package.

Current rates for Text Message Packages are (prices subject to change):

1000 Texts for	- \$55.00
3000 Texts for	- \$135.00
5000 Texts for	- \$160.00

All online orders, completed through our Order Site, will be billed to the account information Atlas has on file. If something has changed, please contact Atlas Sales prior to ordering.

New SMS accounts may take 1-2 business days to verify and create.

After the new account is verified and created you will receive an email confirmation with your Package Code and further details.

Setup Atlas for SMS Feature:

After receiving the confirmation email from the SIGN UP process you will need to enter details into Atlas to engage the new SMS Feature and link to your Text Package.



Setup > Initial Setup > Clinic Details

In Clinic Details click on the SMS Tab.

1. Enter Code SW into the SMS Code box
2. Enter your SMS Email as indicated in your Confirmation Email
3. Enter the SMS Key as indicated in your Confirmation Email
We recommend Copy/Paste to enter the SMS Key to ensure accuracy
4. Click EXIT when done

The screenshot shows the 'CLINIC' setup window with the 'SMS Information' tab selected. The 'SMS code' is 'SW', the 'SMS email' is 'support@atlaschirosys.com', and the 'SMS key' is a long alphanumeric string. A red arrow points to the 'SMS key' field.

The next step to setting up Atlas to use SMS Appointment Reminders is to set a Phone Type to trigger the SMS. This ensures that when you are entering the Patient Phone Numbers and configuring the Patient to Confirm, Atlas will know which Phone Number to send the SMS to.



Setup > Initial Setup > Phone Number Types

In Phone Number Types select ONE type to trigger SMS.

Click EDIT to open the checkboxes and SAVE when completed.
EXIT this window.

Phone Number Type	SMS
Home	<input type="checkbox"/>
Business	<input type="checkbox"/>
Call	<input checked="" type="checkbox"/>
Fax	<input type="checkbox"/>
Other	<input type="checkbox"/>

The screenshot shows the 'PHONE NUMBER TYPES' window with a table of phone number types. The 'Call' type is selected, and its 'SMS' checkbox is checked. The 'EDIT' button is visible at the bottom.

Finally, the last step in setting up Atlas for SMS Messaging is to configure your template that will be sent to Patients. Templates allow users to customize the message that is sent and to personalize the messages.



Setup > Templates > Email and Messaging

In the Templates window use the Top, Prev, Next and Bottom buttons (located along the bottom of the window) to navigate through templates and find the SMS Confirm template. The NAME field (upper left corner) will indicate which template you are currently viewing.

To make any changes to the existing template, click the EDIT button along the bottom row.

Users can use the tokens listed in the right margin to customize the template message.

Setup Patient for SMS Confirmation:

Patient Appointment Confirmation is covered, in detail, in the Safety Net manual available on our Atlas+ Support Site. Please refer to the manual for additional information. The following section will outline the setup and usage of the SMS feature on a Patient file, and will assume the user is familiar with navigating the Atlas System Safety Net.

There are two main points to explain about the Confirmation Feature:

When a Patient is configured to have their Appointments Confirmed, each of their Future Appointments will be set for Reminders.

and

Confirmation Alerts do not 'pop-up' or send automatically, but instead are organized and displayed in the CONFIRMS tab of the Safety Net. Proper use of the Safety Net is required to utilize Confirmations.

To begin, select a Patient who wants to have Reminders sent for their Appointments.

Open the Patient profile by clicking EDIT.

Click into the Confirms / SOAP tab.

You will find a checkbox labeled 'CONFIRM APPOINTMENT' - check this box to 'turn on' the feature for this specific Patient.

PATIENT DATA

Card Number: _____ Misc: _____ Misc2: _____ Old id: _____

ID: 1 Provider: Dr Kevin Manso Language: E English

First Name: Justin Last: Case Nickname: _____ Family: _____

Address: 555 Main Street

City/Town: LOCKPORT Prov: NY Country: U.S.A. Postal Code: 14094-

E-Mail: justincase@mailserver.com

Phone Type	Phone Number	Ext
Home	(716) 555-1234	
Cell	(716) 444-5555	

Add Phone

Personal Information | System Settings | Confirms / S.O.A.P. Settings

CONFIRMS

Confirm appointments

Day of Appointment

1 Day before Appointment

2 Days before Appointment

Confirm method: Text Message

SOAP Section	Question Set
Subjective	<Default>
Objective	<Default>
Assessment	<Default>
Plan	<Default>

Cancel Save

After selecting CONFIRM APPOINTMENT the user will be presented with configuration options.

- **Day of Appointment:** select this option to have the scheduled Appointments appear on the Safety Net the same day for which they are scheduled. User would have to open Safety Net before the shift to Confirm.
- **1 Day before Appointment:** select this option to have the scheduled Appointments appear on the Safety Net 1 day before they are scheduled.
- **2 Days before Appointment:** select this option to have the scheduled Appointments appear on the Safety Net 2 days before they are scheduled.

With each of the options Atlas will take into consideration 'days before' based on the selected NORMAL OPEN DAYS in the Clinic Details.

Next select the Confirm method 'Text Messaging' from the drop-down menu.

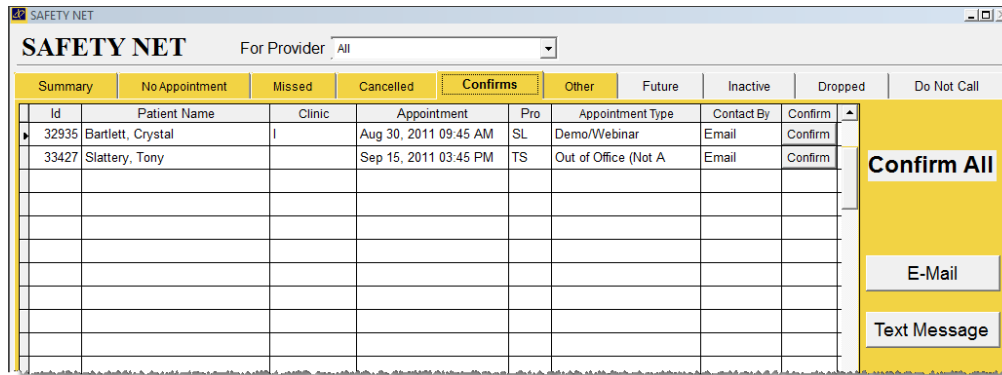
To Test Confirmations:

Select a test Patient and set them up for Confirm 1 Day Before their Appointment as outlined above.

Add an Appointment for that Patient on the next day schedule.

Open the Safety Net and click on the CONFIRM tab.

Note the Patient appearing in the list.



The user can CONFIRM Patients by clicking the individual line CONFIRM button which will send SMS to the specific Patient or by clicking the large TEXT MESSAGING button which will send SMS to each of the Patients on the Confirm list.

Sending Individual SMS:

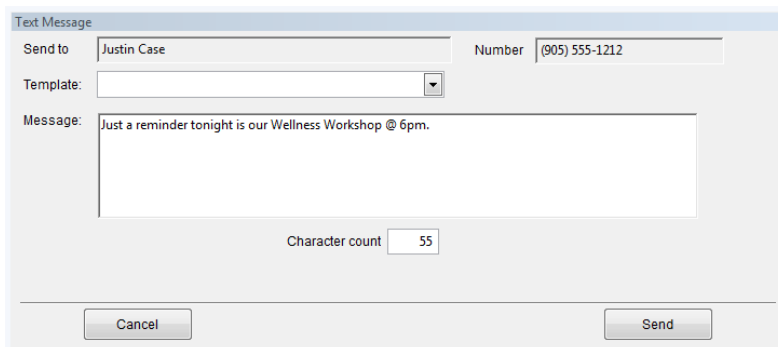
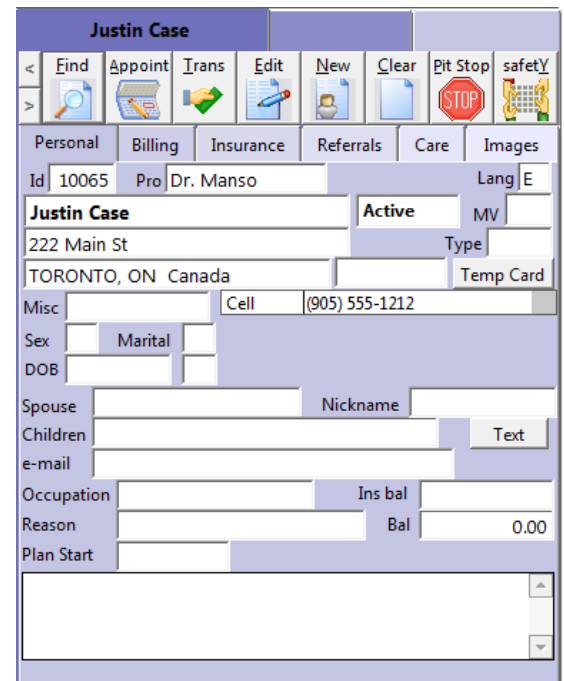
Users can send an individual SMS to any Patient configured with an SMS phone type.

On the Patient Personal tab, click on the TEXT button. The button is located beneath the Nickname text box.

After opening the Text button, simply type in your SMS message.

NOTE: SMS messages are limited to 140 characters. There is a count box on the window to help users calculate this limit.

After entering your message, click Send to send the message.



Continued Usage / Refills:

Running Low on Texts/Running Out of Texts:

When your texting package reaches the low-level, you will receive an email reminder.

To refill, navigate back to the Online Order site (<http://orders.atlaschirosys.net>) and select a refill package. You do not have to order the same amount each time.

NOTE: auto-refill is not an option at this time.

If you run out of texts, Atlas will alert you with a message if you attempt to send an SMS without proper credits.

Your monthly billing will not stop when you exhaust your SMS credits. To cancel the feature, please contact Atlas Support or Sales

Replies from Patients:

Replies from Patients will go back to the email address entered into Clinic Details.

NOTE: End users cannot respond to the Patient reply email. These emails are routed through a third party email server and replies will not be directed back to the Patient.