

Setup

A. Install Latest PowerSoftMD Updates and get Support Backup

B. Setup Scheduling Options

- Top of Schedule select toolbar "Utilities", "Utility Options Menu", "Set Scheduling Options", check the options:
"www.appointmentreminders.com" and
"Daily Automatic Launch Export/Import"

C. Set up Export Location for Interfaces

- 1) Open Scheduling use top toolbar "Tools", "Appointment Reminders", "Export Reminders CSV"
- 2) Create Export and Import Paths, i.e.
H:\ApptReminders\Exports & H:\ApptReminders\Imports
- 3) Use top toolbar "Tools", "Edit Export Path Name"
Fill in "H:\ApptReminders\Exports\" and save it
- 4) Exit "Appointment Reminders CSV" window
- 5) On the Computer that is receiving the Import Confirmation files:
From the PowerSoftMD Login Screen select the "Tools" option,
Then "Edit Login Auto Launch Batch File"
C:\EZW\MED\PGMS\LoginAutoLaunch.bat

```
echo off
cls
echo *-----*
echo *   Login Auto Launch Batch File           *
echo *-----*
start c:\ezw\med\pgms\movefolderfiles.exe
      H:\ApptReminders\Exports C:\ApptReminders\Exports Every(15)
exit
```

- 6) On the Computer that is receiving the Import Confirmation files,
Set up Window Task Scheduler to run the Batch File in #5 once every morning.

D. Set up Import Location for Interface

- 1) Open Scheduling top toolbar “Tools”, “Appointment Reminders”, “Import/Update Confirmations CSV”
- 2) Use top toolbar “Tools”, “Edit Imports Path”
Fill in “C:\ApptReminders\Imports\
Save & Exit
- 3) Check the option “Run Every”, it defaults to 30 minutes.
- 4) Exit “Marked Confirmed ...” window

E. Upload Active Patient Information

- 1) Reports Menu, Patient Search by Criteria
- 2) Set Criteria to a range of what you consider active patients and run the report.
- 3) Advanced Utilities, Export Patients
- 4) Check “AppointmentReminders.com” option and run Export
- 5) Import Contacts to www.appointmentreminders.com

F. Setup Add New Patient Options

- 1) On the Scheduling screen open Scheduling Small Add New Patient Window, select “Tools”, “Options”, check “Require Home and/or Cell Phone”.
- 2) From the Primary Menu, select Utility Menu, then “New Patient Defaults”, check the option “Require Home and/or Cell Phone Number”.

Notes:

1. At the time you make an appointment in the schedule the info is exported automatically at least once per day, when the first staff member opens the Schedule.
2. Different Messages are sent to the patient depending upon if they are a new or established patient.
3. If you cancel (even using Human Error) or move an appointment the info is exported automatically to ApptReminders (it will typically be set to picked up the next day or when you run the “Export Reminders CSV” schedule option manually.