PARS
Patient Appointment Reminder System

(Computerized Version)

Patient Appointment Reminder System

Operation Manual
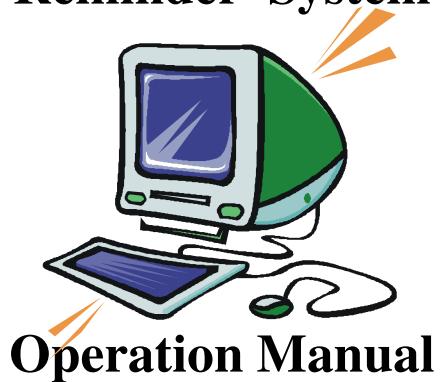
V1.03

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Computerized PARS
Patient Appointment Reminder System

Installation

Call us, we will walk you through the installation!

The easiest way to get started is to call us and let us talk you through the installation of the PARS system. Support is available Monday through Friday, from 7:30a.m. until 4:30p.m., Pacific Time. Our number is (916) 786-6186.

Computer Requirements

1- Must be an IBM PC running Windows 98, ME, XP, or 2000
2- Must have 64 MegaBytes of Memory.
3- Must have a multi-media sound card and speakers.
4- Must have either a CF Card Reader. An external CF Card Reader can be easily added via USB connection.

Software Installation

1- Insert the supplied PARS CD into your computer's CD drive. If the installation program does not automatically start, then follow steps 2 - 4.
2- Select [START] on the TASK BAR
3- Select [RUN], then select [Browse] , and select the CD drive.
4- Highlight "Setup.exe" then select [OPEN], then [OK].

PARS Introduction

How "No Shows" affect you:

The goal of any practice is to be financially successful. To accomplish this task your practitioners must see as many patients as possible. When patients fail to show up for a scheduled appointment, the ability to practice medicine and generate revenue for the practice can be severely limited. The success of any practice depends on its ability to minimize "No Shows" and ensure that patients are accessible to the doctor when he or she is available.

Double and triple booking helps to keep a steady flow of patients, but it is not the best solution. Multiple bookings can often cause more problems then it solves.

The following four-step method can be used to successfully reduce your "No Shows" rate:

1- Have technicians and check-out personnel remind patients of the importance of keeping their next appointment.
2- Create and use an appointment letter. Give a copy of the letter to existing patients as they make future appointments and, when possible, mail the letter to new patients well in advance of their appointments.
3- Institute a telephone confirmation system that makes contact with patients two days before their appointment.
4- Develop a telephone confirmation script that reminds patients of the importance of keeping appointments.

The PARS system is an easy to use, low cost, single line, automated telephone patient appointment reminder system. It can make up to 1000 patients calls every day and can work unattended from 9am till 9pm seven days a week. PARS will provide you with the resources that you need to effectively communicate with your patients in regards to their scheduling needs. Best of all, it is a standalone unit which does not have to be physically connected to your computer to operate. It's cost effective, simple, and easy to use.

PARS Benefits:

* Increases revenues by reducing patient "No Shows".
* Improves communications with your patients.
* More cost effective then postcards.
* Saves hundreds of hours of valuable staff time every month.
* Improves staff morale by eliminating redundant and time-consuming manual calls.

PARS Uses:

* Appointment Reminders
* Appointment Cancellations due to Office Closure, medical emergency, weather, or etc.
* Flue shot, yearly check up reminders.
* Rescheduling of "NO SHOWS".

How PARS works

  The PARS software package works in conjunction with the PARS telecommunication dialer, to provide a powerful, effective, low cost automated patient appointment reminder system. The PARS software imports data that has been exported from your scheduling program, and automatically generates most of the voice prompts needed. The CF Card from the PARS dialer, is inserted into your computer's CF Card Reader, and the PARS software transfers your patient's phone numbers and automated voice prompts directly to the CF Card. When completed, you simply remove the CF Card and insert it back into the PARS dialer, and the dialer automatically starts dialing. It's that easy!

You will be required to make, a one time only, voice recording of: 1) Each patient's name, 2) Each Doctor's Name, 3) Each Facility Location. These recordings will be stored in an internal library on your computer for future reference. The Doctor and Facility prompts are optional and are only used if you select them. You can either make all of your prompt recordings up front, or you can make them as needed. PARS will notify you when it needs new voice recordings.

PARS requires a standard COMMA DELIMITED, TEXT FILE to be exported from your scheduling software for operation. Each RECORD in the file must contain the following fields:

Required Fields

1- Patient's First Name
2- Patient's Last Name
3- Patient's Phone Number
4- Appointment Date
5- Appointment Time

6- Doctor's Name (Optional)

7- Facility Name (Optional)

Each RECORD in the file can also contain other information that PARS does not need.

Once this information is supplied to PARS, it generates the following information to the called party:

1- Patient's Name
2- Doctor's Name (Optional)
3- Day of the Week
4- Month
5- Day
6- Time
7- Facility Location (Optional)

Example message with both Doctor and Facility options:

"Hello this is the Med Clinic calling to remind you of the following appointment: John Smith has an appointment with Dr. Brian Hilton, on Tuesday, March 5th, at two twenty-five p.m., at the Roseville Clinic. It is important that you show up for your appointment. Please arrive at least ten minutes before your appointment and register with the receptionist as soon as you arrive. If you will not be able to keep your appointment, please leave a message after the tone, otherwise we look forward to seeing you. Thank you.[BEEP]"

Example message with both Doctor option:

"Hello this is the Med Clinic calling to remind you of the following appointment: John Smith has an appointment with Dr. Brian Hilton, on Tuesday, March 5th, at two twenty-five p.m. It is important that you show up for your appointment. Please arrive at least ten minutes before your appointment and register with the receptionist as soon as you arrive. If you will not be able to keep your appointment, please leave a message after the tone, otherwise we look forward to seeing you. Thank you.[BEEP]"

Example message without options:

"Hello this is the Med Clinic calling to remind you of the following appointment: John Smith has an appointment on Tuesday, March 5th, at two twenty-five p.m. It is important that you show up for your appointment. Please arrive at least ten minutes before your appointment and register with the receptionist as soon as you arrive. If you will not be able to keep your appointment, please leave a message after the tone, otherwise we look forward to seeing you. Thank you.[BEEP]"

The **RED** TEXT is automatically generated by the PARS software. The other text is a pre-recorded outgoing message that you will record directly on the PARS dialer.

When to make your Reminder Calls:

We suggest that you make all appointment reminder calls two days before the appointment. If you call the night before the appointment, the patient might have already decided not to make it but are too embarrassed to admit they are not coming.   They also might have forgotten about the appointment and made other plans. Reminding them the night before might not be enough time to change their plans. Two days gives the patient enough time to adjust their schedule and to better prepare themselves for the appointment. It also makes it a easier for the patient to request a re-scheduling of the appointment. It is important to design your outgoing message so that it politely reminds the patient of the importance of keeping the appointment and being on time.

Computer CF Card Reader

In order to use PARS you must have a CF Card Reader installed on your computer. If you do not have one, we suggest that you purchase an external USB version. Installation is simple, just connect the USB cable. No drivers are usually required for Windows XP.

PARS Software Initialization

ZIP Drive Location

This is the drive designation for your CF Card Reader. You can use Windows Explorer to determine the drive letter of your CF Card Reader if needed.

Local Area Code

The Local area code is your area code and it is REQUIRED for operation.

Auto Delete Patient Responses

When checked, PARS will erase all called party messages on the CF Card. This improves accuracy of the information displayed during playback, but it should only be used on PARS dialers with version 3.12 and above. If you use this feature on earlier versions, it will cause the PARS dialer to go though a 30 minute disk scan before the dialer dials.

Use Patient's First Name Only

When this box is checked, PARS uses the first name ONLY when calling patients. The biggest benefit to this feature is that your library of names is much shorter. This means that you don't have to record very many new name prompts. The following is an example message using this feature:

"Hello this is the Med Clinic calling to remind you of the following appointment: John has an appointment with Dr. Brian Hilton, on Tuesday, March 5th, at two twenty-five p.m., at the Roseville Clinic. It is important that you show up for your appointment. Please arrive at least ten minutes before your appointment and register with the receptionist as soon as you arrive. If you will not be able to keep your appointment, please leave a message after the tone, otherwise we look forward to seeing you. Thank you.[BEEP]"

The following patients names will all use the same Library Voice File: John Smith, John McClean, John Little, John Crawford. Without this feature there would be a separate library voice file for each patient.

Use Doctor's Name

When checked, this feature includes the name of the patient's Doctor in the reminder message.

Use Location Name

When checked, this feature includes the name of the patient's Doctor in the reminder message.

Other Local Area Codes

In large metropolitan areas sometimes they have multiple local area codes. PARS allows you to enter multiple other Local area codes. To add a new Local Area Code, click on the "Enter Here" box and and enter the new 3 digit code. Once entered, click "ADD". To delete an Area Code, select it by clicking on it and then click the "DEL" button.

Local Prefixes

If you are not required to dial an area code to dial your next door neighbor, but you must dial your area code if you dial somebody 20 miles away, in your same area code, then check this box! You must then enter all of the prefixes that are considered local calls. To add a new PREFIX, click on the "Enter Here" box and enter the new 3 digit prefix. Once entered, click "ADD". To delete a PREFIX, select it by clicking on it and then click the "DEL" button.

Dial '1' on Local Calls

When checked, PARS will dial a 1 before all phone numbers.

Dial Loc Area Code on Local Calls

When checked, PARS will dial the area code on all local calls that are in area code number 1. PARS will still dial the area code on all local area codes 2-6, and all long distance numbers. Any phone number that has only 7 digits will automatically be assigned the local area code number 1.

Selected Date Control
These c

Text" File to Import

This is the file that is exported from your scheduling software, that contains the important information. It can be stored in any folder (subdirectory) that you wish. The file must be a standard COMMA DELIMITED, TEXT FILE. Each RECORD in the file must contain the following fields:

Required Fields

1- Patient's First Name
2- Patient's Last Name
3- Patient's Phone Number
4- Appointment Date
5- Appointment Time

6- Doctor's Name (Optional)
7- Facility Name (Optional)

Each RECORD in the file can also contain other information that PARS does not use.

When PARS is installed this parameter is set to a sample file named, SAMPLE.TXT. This file is located under C:\Program Files\PARS. You can use this file to test PARS.

Field Designation

This area shows which field positions, in the "Text" file, are allocated to the specified PARS data. These numbers can not be changed directly. You must click the [CHANGE] button, and use the UP/DOWN arrows above each field to change the position. The window below each field shows the actual field data from the first 15 records of the "Text" file. The Doctor and Location fields are optional and are not required. If you do not wish to use one or both of these fields, then adjust the corresponding position to zero.

1st Record Disable

This should only be checked if the first record of the "Text" file contains column names. When checked, it ignores the first line of the "Text" file. If the first line of the "Text" file does not contain column names, and you check this box, then you will bypass the first patient's appointment.

Voice Prompts Used

The two choices are STANDARD and USER RECORDED. STANDARD, uses the standard pre-recorded voice prompts that are supplied with PARS. USER RECORDED, can be used if you desire to have the voice prompts spoken in your own voice. In this case you must click on the Record User Prompts button and record approximately eighty prompts before PARS will allow you to change this parameter to the USER RECORDED selection. The custom prompt section is easy to use but takes at least a half hour to complete. PARS will display each prompt that needs to be recorded and automatically trims each recording for you. Make sure that you take your time and check to make sure that each prompt sound good before saving them.

Voice File Adjustments

You should not make any adjustments to this section without talking with technical support first. These adjustments are used to correct inconsistencies between different sound cards.

Added (ms)

This parameter adds time to the end all voice files that are recorded on the PARS system. The time is in milliseconds.

Subtracted (ms)

This parameter subtracts time from the end of all voice files that are recorded on the PARS system. The time is in milliseconds.

Computer Initialization

In order to use PARS, you must have a minimum of the following.

1- Computer running Windows 98, 2000, ME, or XP operating system.
2- A computer voice card
3- A CF Card Reader.
4- 10 Megabytes of available hard drive space.

CF Card Reader

In order to use PARS you must have either an internal or external CF(Compact Flash) Card Reader installed on your computer. If you do not have one, we suggest that you purchase an external USB version (assuming you have a USB port on your computer) .   Installation is simple, just connect the USB cable.

Disabling System Sounds

If your computer has problems playing back messages that were left by patients, we recommend that the computer "system sounds" be disabled. These are the sounds that your computer makes when you close a window. To disable the sounds simply follow these steps:

Click on the following:
1- [Start]
2- [Settings]
3- [Control Pannel]
4- Double click on [Sound] (sometimes labeled [Sounds and Multimedia]).
5- In the window beneath [Scheme:] select "No Sound"
6- Click [Apply] then [OK]

Running other Software

If you are going to be recording new voice messages, we suggest that you exit all other programs before running PARS. We have found that other programs running in the background can cause difficulties with the PARS recording sequence. Once you have finished recording your voice prompts with PARS you can run any program that you wish.

Speaker Volume Adjustment

The volume of the playback is not adjusted by this program. It is adjusted with your computers VOLUME CONTROL. You can adjust the volume by left clicking on the **SPEAKER ICON** in the lower right hand corner of your windows screen. If you DOUBLE LEFT CLICK the speaker ICON, you can pull up the MASTER VOLUME (or Mixer). Under this screen you can use the MASTER and/or WAV sections to adjust balance, volume and mute of the speakers. You can also access the VOLUME under Programs-Accessories-Entertainment-Volume Control.

Microphone for Recording

You can use the microphone that came with the PARS dialer for recording on your computer. The microphone will connect to the MIC input on your computer voice card, usually located on the rear of the computer. We have found that a lot of voice cards have very low volume with a straight microphone. If this is the case we sell a boosted amplifier that will resolve this problem. The amplifier is the model AT-7P. This unit will allow you to adjust for proper record level.

PARS Software Operation

Outgoing Message

This mode is used to TEST and RECORD the PARS Outgoing Message. The message that the called party hears, is a three part message. Two of the parts are from the Outgoing Message and the third part is generated by the computer. The following is an example of a complete three part message:

Example #1:

"Hello this is the Med Clinic calling to remind you of the following appointment: John Smith has an appointment with Dr. Brian Hilton, on Tuesday, March 5th, at two twenty-five p.m., at the Roseville Clinic. It is important that you show up for your appointment. Please arrive at least ten minutes before your appointment and register with the receptionist as soon as you arrive. If you will not be able to keep your

appointment, please leave a message after the tone, otherwise we look forward to seeing you. Thank you.[BEEP]"

The RED portion is computer generated, while the black portions represent the two parts of the Outgoing Message.

You have the option of allowing the patient to leave a message as in example #1 or not to leave a message as in example #2.

Example #2

"Hello this is the Med Clinic calling to remind you of the following appointment: John Smith has an appointment with Dr. Brian Hilton, on Tuesday, March 5th, at two twenty-five p.m., at the Roseville Clinic. It is important that you show up for your appointment. Please arrive at least ten minutes before your appointment and register with the receptionist as soon as you arrive. Please call the office at 555-1234 if you will not be able to make your appointment. Thank you."

After recording the 2nd portion of the Outgoing Message, PARS prompts you with the question; "Do you wish to allow the patient to leave a message?".

Message Script

The message script area is similar to a mini word processor. It allows you to create your own customized script. Once entered, PARS retains the script until you change it. This provides a valuable tool for the message record process. The default script is only supplied as a sample.

Recording your Message

Connect the microphone to the MIC jack on your computer. You can use the microphone that came with your PARS dialer if you wish. The MIC jack is usually located on the rear panel of your computer. Next click on the speaker icon on the lower right hand corner of your computer, and adjust the speaker volume to approximately the half way point. Next within the MESSAGE box make sure that the desired message that you wish to record is checked. Now click the record button and start dictating. When you are finished click end and the message will automatically playback to you.
  If the message level is too low, you might need a booster amplified. We offer a model AT-7P especially for this application.

SAVE

After you have successfully recorded both parts or you outgoing message, click the SAVE button before exiting. PARS will ask you : "Do you wish to let Patient's leave a message?". If YES, the called party will be allowed to leave a message at the end of the outgoing message. If NO, the PARS dialer will simply hang up. The display will show a blue "Get Response" if the current message allows the patient to leave a message.

Testing your Message

If you wish to hear your current outgoing message, simply enter the Outgoing Message mode and click on Playback. You must check both parts of the message separately.

Voice File Maintenance

   This section is used to record, test, and delete patient's names, doctor's names, and location voice files. These voice files only need to be recorded once. You do not have to record them in this mode. PARS will prompt you when it needs new voice files in the "Import Schedule to ZIP" mode.

   You can create new voice files by typing in the new name, recording the voice file, then saving it. To test an existing file, click on Load, select the file, click Open, then click Playback. Remember to click SAVE if you wish to save any changes.

Results

This mode allows you to inspect the results of your last dial session, and also to playback any messages that were left by your patients. Messages can be played back either on the PARS dialer or on your computer. PARS supplies the following information about each message:

1- Patient's Name
2- Appointment Date
3- Appointment Time
4- Doctor's Name
5- Location of the Appointment
6- Patient's Phone Number
7- Date and Time that Message was left
8- Number of Messages on the CF Card

This information is only available if you playback your messages before you Import a new schedule. Once you "IMPORT a schedule to ZIP", all old messages are automatically erased.

Playback

The window on the right side of the screen shows the patients that left messages. To playback a message, simply left click on the name of the patient and PARS will playback the corresponding message. After the message has played back, PARS will ask you if you wish to DELETE the message. This simply removes the name off the screen. To regain access to all the messages exit the RESULTS window and re-enter. Once you IMPORT a schedule, all old messages are deleted.

Volume Adjustment

        The volume of the playback is not adjusted by this program. It is adjusted with your computers VOLUME CONTROL. You can adjust the volume by left clicking on the **SPEAKER ICON** in the lower right hand corner of your windows screen. If you DOUBLE LEFT CLICK the speaker ICON, you can pull up the MASTER VOLUME (or Mixer). Under this screen you can use the MASTER and/or WAV sections to adjust balance, volume and mute of the speakers. You can also access the VOLUME under Programs-Accessories-Entertainment-Volume Control.

Import Schedule to ZIP

 This mode transfers your schedule information, and creates the custom voice files needed, to the PARS CF Card. The file that this mode uses is selected in SETUP mode, under "Text" file to Import. PARS assumes that you will use the same file name, stored in the same sub directory, every time that you use PARS. The first step is to export your schedule information from your scheduling software to a standard comma delimited text file. Next run the "Import Schedule to ZIP". PARS will first analyze the data and report the status of the file. The Import Schedule to ZIP screen will show the following information.

Total Records

This shows the total number of records that are in your source file.

Transferable Records

This shows the total number of records that are eligible for transfer to the CF Card. Records that do not have the patients names recorded will transfer, but instead of saying the patient's name, PARS will substitute the word "You".

Defective Records

This is the total number of records that are missing at least one critical piece of information that prevents it from being transferred.

Data Errors

This box shows the records that have data errors and thus cannot be transferred. If you wish to call these patients with the PARS system, you will have to exit PARS and fix the defective data in your scheduling software first. After you fix the problems in your scheduling software, re-export the data then re-run PARS.

Recordings Needed

PARS uses a library of voice files to speak each patient's and doctor's name, and the location name. These files only have to be recorded once. PARS keeps track of them. Records listed in this box are names that are not presently in the library. If you "Transfer to ZIP" without recording them, PARS will still call each record. It will substitute the word "You" for the patient's name, and will not specify a doctor's name or a location if the corresponding voice files are not present.

Recording the Needed Voice Files

To make a recording of the needed voice file, simply click on the name in the "Recordings Needed" box. PARS will allow you to record the new voice file, test it, and then save it . PARS will automatically remove the name after you record a voice file for it.

Transfer to ZIP

This function actually transfers the speech and data files to the PARS disk. All of the DATA ERRORS should be resolved, and all new voice files should be recorded before you click this button.

   When the transfer is complete, the screen will show the first 100 records that were transferred, with the exception that the last record is always the last record transferred. This allows you to inspect the information that was transferred.

Test Last Message

This mode allows you to listen to the message that will be played to the last patient in the file. This is the complete message.

Step by Step Transfer Instructions

Initial

1. Export a test file from your scheduling software.
2. Go to PARS SETUP
2. Adjust your ZIP drive Location (Drive letter for CF Card Reader).

3. Enter Local Area Code #1
4. Click on the "Text" File to Import" window, and select the comma delimited text file that you exported from your scheduling software.
5. Click on the CHANGE button and adjust the fields.
6. Exit SETUP and choose "Outgoing Message".
7. Record your outgoing Message, both parts, then save it.

Repetitive

1. Inset your PARS dialer CF Card into your computer's CF Card Reader.
2. After exporting your comma delimited text file from your scheduling software, select the "Import Schedule to ZIP" function.
3. Check for any "Data Errors" and fix in your scheduling software if needed.
4. Record any voice files needed as shown in the "Recordings Needed" window, by clicking on the name.
5. Click on the "Transfer to ZIP" button.
6. After finished, remove the CF Card and put into the PARS dialer. That's it!

Technical Support

If you have any questions or problems, you should call us for technical support. Support is available Monday through Friday, from 7:30a.m. until 4:30p.m., Pacific Time, excluding holidays. Our number is (916) 786-6186.