



## **Broadcast User Guide**

Last Updated: 2/5/2019

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## Revision History

Version No.	Date	Prepared by / Modified By	Significant Changes
1.0	2/05/2019	Andrea Altenburg	Initial Release

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## Welcome and Introduction

Thank you for choosing Broadcast for your messaging needs. Whether you're using Broadcast alone or in conjunction with RemindMe, you've made a wise choice!

Broadcast is a service that will allow you to send a message out to a distribution list ranging from a few people to hundreds of people. It is useful in many situations, for example to call a group of patients scheduled for appointments on a given day to inform them of an office closing or to make an announcement about flu shots. The possibilities are endless!

## System Basics and Requirements

### How the System Works

Broadcast is a web-based messaging system that allows you to send messages to any group of people, anytime. Using the system is simple:

1. Create a distribution list
2. Create your message(s)
3. Schedule your message(s)

Since these messages are sent by servers at our location, there is no need for any specialized telephone hardware to be installed in your home or office. And since this is a web-based application, there is no software to install on your computer.

### System Requirements

No specialized equipment is required. Only a connection to the internet and log in credentials for the Customer Portal.

## Signing into the Customer Portal

Point your browser to <http://www.portal.talksoftonline.com> and click on 'Customer Portal' near the top right side of your screen. Enter your e-mail address and password to log in.

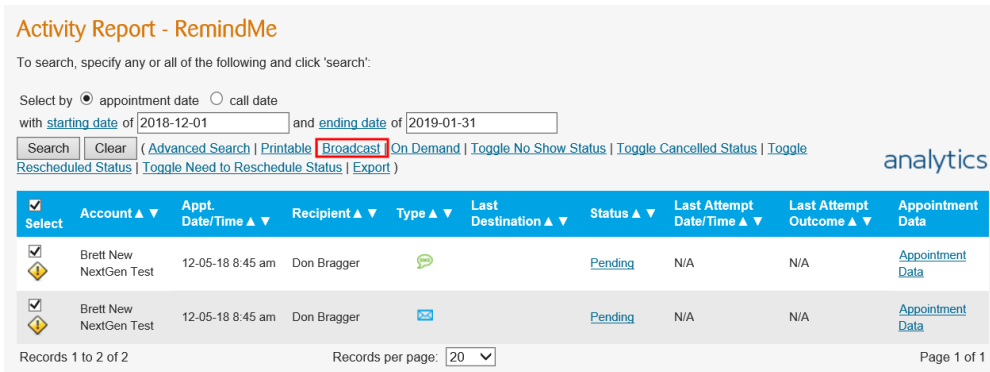
If you are also a RemindMe subscriber, you'll see your daily reminder activity screen. If you are a Broadcast-only customer, you'll start at the Broadcast Wizard page.

## Import from Schedule

If you are also a RemindMe customer, you can retrieve a list of phone numbers from your schedule based on selected criteria.

To do this, go to the RemindMe Activity Report and use the Advanced Search option to apply any filters, and search for the patients you want to contact.

Once the correct patients are displayed on your screen – click the “Broadcast” link to the right of the search bar to create a distribution list from the currently selected set of appointments.



**Activity Report - RemindMe**

To search, specify any or all of the following and click 'search':

Select by  appointment date  call date  
 with starting date of 2018-12-01 and ending date of 2019-01-31

Search Clear (Advanced Search | Printable | **Broadcast** | On Demand | Toggle No Show Status | Toggle Cancelled Status | Toggle Rescheduled Status | Toggle Need to Reschedule Status | Export)

Select	Account	Appt. Date/Time	Recipient	Type	Last Destination	Status	Last Attempt Date/Time	Last Attempt Outcome	Appointment Data
<input checked="" type="checkbox"/>	Brett New NextGen Test	12-05-18 8:45 am	Don Bragger			Pending	N/A	N/A	<a href="#">Appointment Data</a>
<input checked="" type="checkbox"/>	Brett New NextGen Test	12-05-18 8:45 am	Don Bragger			Pending	N/A	N/A	<a href="#">Appointment Data</a>

Records 1 to 2 of 2      Records per page: 20      Page 1 of 1

## Create a Distribution List

The first step of a sending a broadcast is to create a distribution list. We need to know who the message should be sent to. A distribution list is simply a list of contact information. You have the option to attach a name to each phone number or email address for your reference.

A distribution list can be created in one of several ways: Manual Creation, Import From File, or Import From Schedule. We will review each.

### Create a Distribution list

- In your Activity Report - RemindMe, update your start and end date. (please note, advanced search will allow you to filter by locations and providers using filter 1 and filter 2)
- Scroll to the bottom of your list and change the "Record per Page" to "MAX" (this will ensure you see everything on one screen)
- Back, at the top of the list, mark off the gray box next to 'Select' in the blue header
- Click the link "Broadcast" located next to the 'Search' and 'Clear' button
- A window with pop up "Enter the name of this Distribution List" - make it something obvious to you (i.e. Storm 9/1) > OK

### Activity Report - RemindMe

To search, specify any or all of the following and click 'search':

Select by  appointment date  call date  
 with starting date of 2018-12-01 and ending date of 2019-01-31

Search Clear (Advanced Search | Printable | **Broadcast** | On Demand | Toggle.No.Show.Status | Toggle.Cancelled.Status | Toggle.Rescheduled.Status | Toggle.Need.to.Reschedule.Status | Export)

analytics

Select	Account	Appt. Date/Time	Recipient	Type	Last Destination	Status	Last Attempt Date/Time	Last Attempt Outcome	Appointment Data
<input checked="" type="checkbox"/>	Brett New NextGen Test	12-05-18 8:45 am	Don Bragger			Pending	N/A	N/A	<a href="#">Appointment Data</a>
<input checked="" type="checkbox"/>	Brett New NextGen Test	12-05-18 8:45 am	Don Bragger			Pending	N/A	N/A	<a href="#">Appointment Data</a>

Records 1 to 2 of 2      Records per page: 20      Page 1 of 1

talksoftonline.com needs some information

Script Prompt:  
Please enter a name for this distribution list

OK      Cancel

## Broadcast

- Activity Report
- Call Wizard
- Distribution Lists
- Messages
- Schedule Broadcast
- Account History**
- Statistics

## Manual Creation

You can create an empty distribution list and individually enter each phone number or email address (and name and/or mode if desired). This is appropriate for small lists or lists that you don't already have in some electronic format. Find the Distribution List under the Broadcast Section.

## Manage Distribution Lists

### Your Lists

Select List:

[create empty list](#) | [remove list](#) | [add member](#) | [upload members](#) | [schedule a Broadcast](#)

No records found

To manually create an empty list, select 'create empty list', which prompts you to enter a list name. At the top of the page, enter the name of your list (ie: Snow Closure Dec 4) and click "Save".

Enter new list name:

## Manage Distribution Lists

### Your Lists

Select List:

[create empty list](#) | [remove list](#) | [add member](#) | [upload members](#) | [schedule a Broadcast](#)

No records found

From this screen, click 'add member' to arrive at the following:



Successfully added list: Snow Closure Dec 4

## Manage Distribution Lists

### Your Lists

Select List:

[create empty list](#) | [remove list](#) | [add member](#) | [upload members](#) | [schedule a Broadcast](#)

No records found

Enter the phone number or email address (and optionally the name and mode) of the desired recipient in the Member Destination field, Destination type, and the optional Member Name, then press the 'Save' button.

Member Destination:

Destination Type:

Member name (optional):

## Manage Distribution Lists

### Your Lists

Select List:

[create empty list](#) | [remove list](#) | [add member](#) | [upload members](#) | [schedule a Broadcast](#)

No records found

Repeat this 'add member' step for each desired recipient.

## Upload File

You can import a list from a file stored on your PC. This is useful if you have a large list that is already contained in a file on your computer.

### Broadcast File Specifications

The Broadcast file must be in CSV format and must have either:

- A single phone number or email address on each line (row).

-Most phone number formats are accepted. ie: 1-201-555-1212 or 12015551212 or (201) 555-1212

Destination
18669664700
(555) 123-4567
sallysmith@example.com

-OR-

- In each line (row), a single phone number or email address in the first column and the recipient's name in the second column, (can be first and last name or just last name but only one column) where the first and second columns are separated by commas (CSV format).

Destination	Name
18669664700	Ted Talksoft
(555) 123-4567	John Doe
sallysmith@example.com	Sally Smith

-OR-

- In each line (row), a single phone number or email address in the first column, the recipient's name in the second column, and the mode of contact (CALL, SMS, or EMAIL) in the third column, where columns are separated by commas (CSV format). If Mode line is blank, the system will try a call and text for phone numbers and an Email for email addresses.

Destination	Name	Mode
18669664700	Ted Talksoft	SMS
(555) 123-4567	John Doe	
sallysmith@example.com	Sally Smith	EMAIL
555-555-5555	Sally Smith	CALL

Column headers are optional, but if specified should be named 'Destination', 'Name', and 'Mode', respectively.

Note that Microsoft Excel can save a document in comma-separated format (CSV).

### Browse for/Upload File From Your Computer

To upload a list of recipients from a file, create an empty, give it a name, then press 'Save'. With the list selected, click the 'upload members' link.

Click "Choose File" at the top of the screen then browse to the location of the file. Select the file, then press 'Upload'.

Please upload a .txt or .csv file containing recipient name followed by destination which is followed by destination type on separate lines

File to upload into selected list:

### Manage Distribution Lists

Your Lists

Select List:

[create empty list](#) | [remove list](#) | [add member](#) | [upload members](#) | [schedule a Broadcast](#)

No records found

From here, you can remove members if necessary, add/upload more members into this list, or go directly to schedule the call.

**Manage Distribution Lists**

Your Lists

Select List:

[create empty list](#) | [remove list](#) | [add member](#) | [upload members](#) | [schedule a call](#)

Phone Number	Recipient Name	Actions
15551859987	Yates	<a href="#">delete</a>
15554561231	Smith	<a href="#">delete</a>
15554563211	Brown	<a href="#">delete</a>
15556512387	Robertson	<a href="#">delete</a>
15556987142	Baldman	<a href="#">delete</a>
15557894895	Smith	<a href="#">delete</a>
15559517891	Ryans	<a href="#">delete</a>
15559812874	Smith	<a href="#">delete</a>
15559813575	Dickson	<a href="#">delete</a>
15559813854	Weaver	<a href="#">delete</a>
15559815687	White	<a href="#">delete</a>
15559849844	Wright	<a href="#">delete</a>
15559874535	Tejas	<a href="#">delete</a>
15559874561	Steven	<a href="#">delete</a>
15559874563	Johnson	<a href="#">delete</a>
15559874566	Hanson	<a href="#">delete</a>
15559875316	Cruise	<a href="#">delete</a>
15559875613	Williams	<a href="#">delete</a>

Records 1 to 18 of 18 Page 1 of 1

## Recording Voice Messages

To send a phone call, you must first record the message that will be played during the phone call.

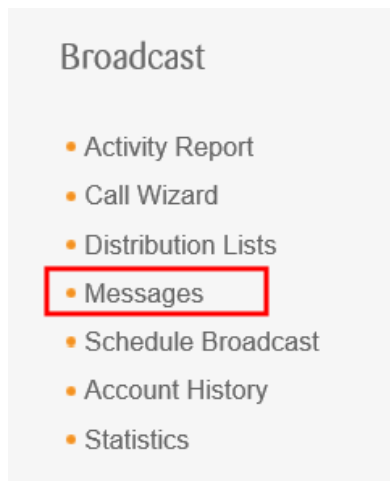
The 'Broadcast Message Template' screen shows all voice messages recorded to-date. You can view this screen by clicking 'Messages' in the Broadcast Menu on the left hand side.

To record a message, follow the instructions on the screen.

You can record any number of messages. Some offices prefer to have pre-recorded messages that can be quickly selected at the time of an event (ie: office closure). Other offices prefer to record the message at the time they need to send it.

Record your Broadcast message

- On the left-hand side of the screen, under the Broadcast service select the "Messages" bullet.
- Please follow the blue bullet point instruction on how to record the message - Online and Phone options (please note, account # and access code is listed in the parenthesis).
- Once recorded, refresh the screen to confirm the message has been saved.



### Broadcast Message Templates

Your Voice Messages

Message #	Actions	Message Description
You have no recorded messages. Record one by following the instructions below.		

Online Recording | Phone Recording

Follow the instructions below to add or change your Broadcast call messages.  
(\* check out these helpful tips to improve your messages [show tips](#) \*)

- Dial Talksoft at 833.288.3277
- Enter your account number (702837), followed by the # key.
- Enter your access code (231332), followed by the # key.
- Choose option 3 "For Broadcast messages".
- Choose option 5 to "To record your Broadcast messages"
  - Broadcast Message \*Required\* [show example](#)

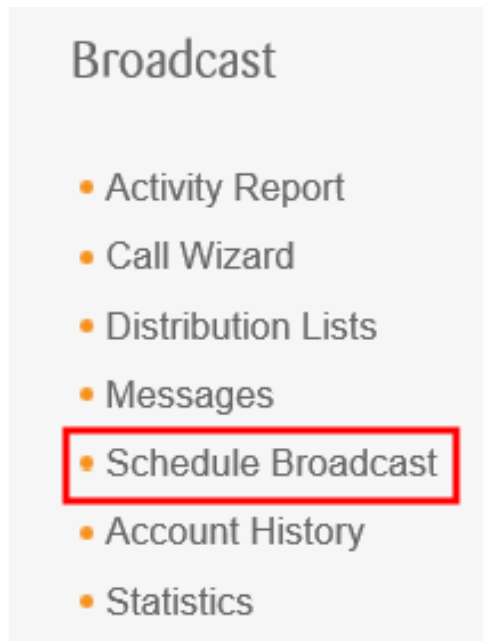
Save

## Schedule Your Broadcast

Once you have your distribution list set up and a message recorded, you can schedule the broadcast message. If your distribution list supports it, you can send text message and email broadcasts in addition to or instead of phone call messages. The "Schedule Broadcast" page allows you to select and create the messages you would like to send.

Schedule your Broadcast

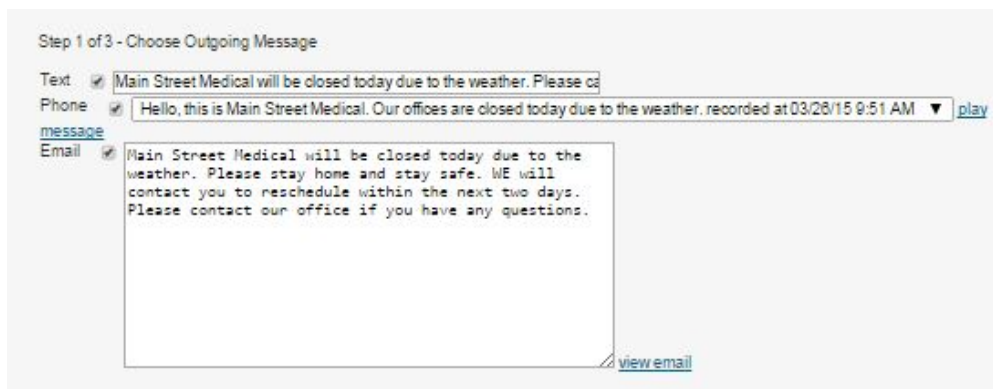
- On the left-hand side of the screen, under the Broadcast service select the "Schedule Broadcast" bullet



- Complete Steps 1, 2, & 3
  - Step 1, select your message
  - Step 2, select your distribution list in the drop down menu
  - Step 3, Select Date and Time for your Broadcast (please note, we will not make broadcast message after your cutoff hour, but we will before your start hour as early as 6 am)

## Selecting Phone, Text and/or Email

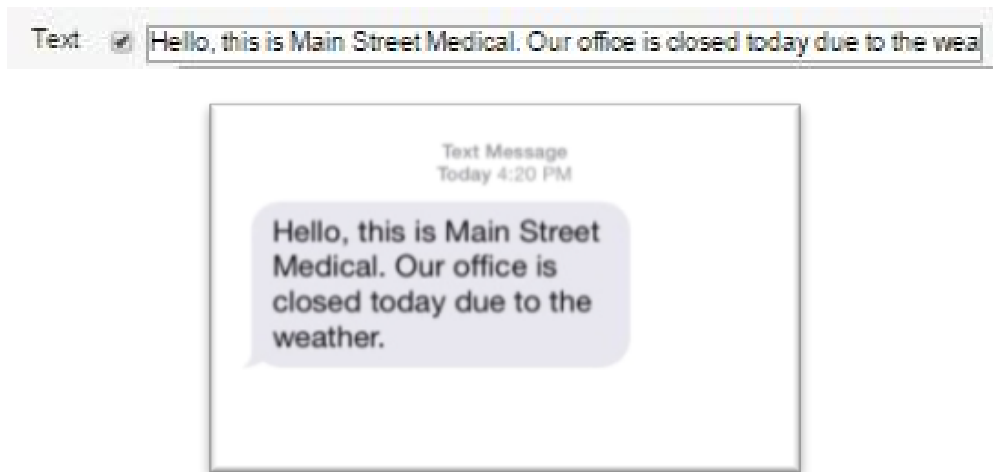
By clicking the check box next to Text, Phone, and or Email – you are selecting which message(s) will be sent.



## Create a Text Message

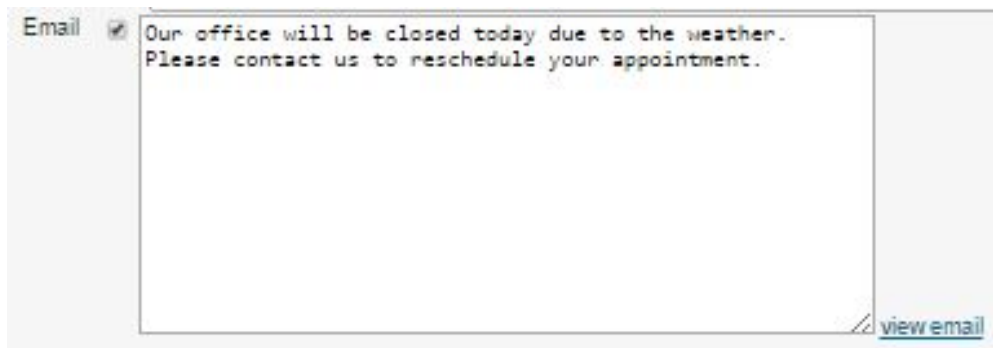
To send a text message, click the box next to "Text" and type in the Text Message you want sent.

NOTE: Text messages are limited to 140 characters.



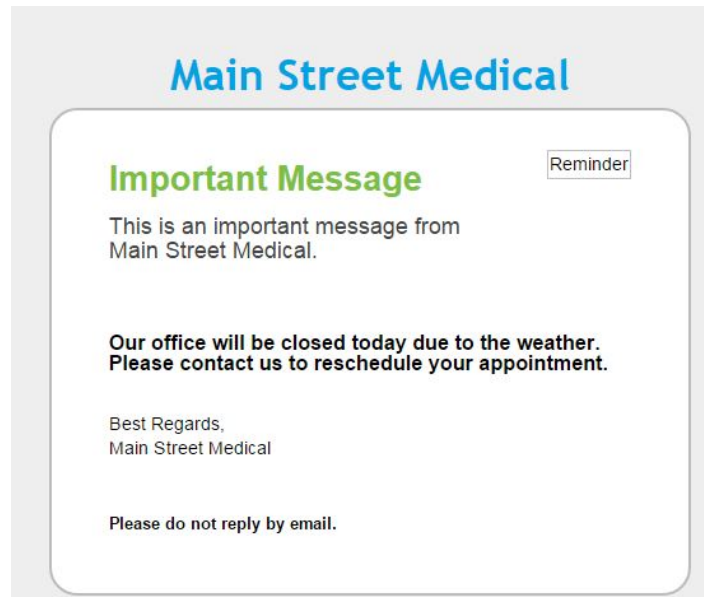
### 6.1.2 Create an Email Message

To create an email, click the box next to “Email” and type in the Email Message you want sent.



Note: Additional formatting is added to the plain text. Click “view email” to see the formatted version.

Sample email:



## Selecting the Date and Time

Use the dropdown menu in Step 3 to choose the date and time you would like your messages to be sent. For immediate / ASAP delivery, select “Today” and “Now”.

Contact hours are subject to the “cut off” time on your Account Settings, but your account “start hour” does NOT apply and messages can start as early as 6 am – depending on when you schedule them to be sent.

## Sending Your Messages

When you have completed all of the above to your satisfaction and are ready to submit your messages to be set, select the ‘I understand...’ checkbox and click ‘Schedule Broadcast Now’. You will arrive at a confirmation page if successful.

From this screen, you’ll see your reference number, which you can use to track the outcomes of each message, typically available 1-2 hours after the scheduled start time. A history of your broadcast messages and their reference numbers can also be found by clicking the ‘Call History’ link in your Broadcast Toolbox.

## Check Results of the Broadcast

It is recommended that you verify that your messages reached the intended recipients.

To check your message outcomes, click on the ‘Account History’ link in the Broadcast Toolbox. You will see a screen similar to the following:

To view a detailed status for a given broadcast message, click on its reference number. You’ll then see the Broadcast ‘Activity Report’ screen, where you see individual call outcomes.



## Valid Phone Numbers

The system will only dial valid phone numbers – if there are insufficient digits or too many digits, the call will not be attempted and will be considered ‘failed’.

## Call Destinations - Answering Machines and Voicemail

If a call is picked up by an answering machine or voicemail system, the system will wait until it hears sufficient silence to indicate the end of the outgoing message. Then it will speak the broadcast message, leaving it on the answering machine or voicemail system. The system decides an answering machine has picked up through a series of noise vs silence detections.

Call progress is enabled for all customers. <MadCap:variable name="Variables.CompanyName"/> RemindMe employs powerful technology that detects many types of call outcomes, including:

- answered by person
- answered by voicemail or answering machine
- busy
- no answer
- operator intercept (number is disconnected, etc)

## Completed Calls

A call is considered complete if the call is answered, and all or any portion of the broadcast message is spoken to the recipient.

## Failed Call Attempts

The following will result in a failed call attempt:

- Busy signal
- No answer
- Invalid phone number (ie. Number is disconnected)
- Calls hung up before a significant portion of the message is spoken (Quick Hangup).

## Caller ID

The caller ID that will appear on recipients’ phones when a broadcast call is placed will be that which is specified at the time of your installation.

## Retry Call

Upon a failed attempt, the system will re-try a reminder according to your account “retry” setting, up to 3 times.

## SMS Detection

Phone numbers will automatically be scanned to determine if they are textable or not. Any phone number that is textable will be sent an SMS message (if an SMS message is created on the “Schedule Calls” screen).

# Glossary

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## M

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**My Term**

My definition