

AUTO CALLS

4 Steps to activate auto calls for patient reminders and NEE confirmations:

1. Click admin

The screenshot shows the TAB software interface. At the top, there is a navigation bar with links for home, my account, admin, email, and logoff. A red box with a white arrow points to the 'admin' link. Below the navigation bar, there is a search box and a date/time display for Sunday, July 14, 2019, at 12:00 PM. A statistics box shows YTD Exams Checked-in (108.55), Partial YTD Patient Retention (19.74%), and Complete YTD Patient Retention (21.10%). The main heading is 'Appointments'. Below this, there are buttons for weekly view, refresh, search, reports, families, next eye exams, Insert Doctor..., and Replace Doctor. The office is set to 'PV6321 Pearle Vision Coventry Mall'. The date is set to 'Sat 07/13/2019'. The appointment schedule for 'A. Delaney' is shown below, with appointments for Kaylee Becker NP EEX, Alexis Rodgers NP EEX, Peggy Kulp NP CL, Dorine Achoki EP E, and Abigail Dlhopsky NP CL.

| Time | A. Delaney |
|----------|------------------------|
| 10:00 AM | Kaylee Becker NP EEX |
| 10:15 AM | |
| 10:30 AM | Alexis Rodgers NP EEX |
| 10:45 AM | |
| 11:00 AM | Peggy Kulp NP CL |
| 11:15 AM | |
| 11:30 AM | Dorine Achoki EP E |
| 11:45 AM | |
| 12:00 PM | Abigail Dlhopsky NP CL |



Administration Menu

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2. Click Office Preferences

5-minute [Schedule Revision Tutorial](#)
May not be compatible with EyeNET



3. Click Auto Calls

Office Preferences

| | | | | | |
|----------------------------|-------------------|-------------------|-----------------|-----------------|---------------|
| General Information | Online Scheduling | Comm. Preferences | Automated Calls | Local Marketing | Audit History |
|----------------------------|-------------------|-------------------|-----------------|-----------------|---------------|

Practice Information and User Tracking

Location Info: **Office Name:** Pearle Vision Coventry Mall
Store Number: PV000006321
Address: 351 West Schuylkill Road Suite H-1, Pottstown, PA 19465
Phone: (610)327-3322
Fax: (610)327-0906

Require Log Initials to track entries in your book: Admin User Office User

Authorized By: * Please enter your individual user code or initials for Audit History record.



[Help](#)



Office Preferences

- General Information
- Online Scheduling
- Comm. Preferences
- Automated Calls**
- Local Marketing
- Audit History

Auto-Phone Practice Information

i Location Info: **Office Name:** Pearle Vision Coventry Mall
Store Number: PV00006321
Address: 351 West Schuylkill Road Suite H-1, Pottstown, PA 19465
Phone: (610)327-3322
Fax: (610)327-0906

Automated Phone Calls:

Holiday Call Schedule i

i Activate Auto-Phone Calls: *

- Existing Patient Reminders
- Next Eye Exam Confirmations & Reminders
- None

4. Check boxes

i Auto Call Availability: * If entering availability for the AM or PM shift, it is required that both Start Time and Stop Time are selected.

| | AM Shift | | PM Shift | |
|------------|---------------------------------------------------|---------------------------------------------------|---------------------------------------------------|---------------------------------------------------|
| | Start Time | Stop Time | Start Time | Stop Time |
| Monday: | NONE ◇ | NONE ◇ | 04:30 PM ◇ | 07:00 PM ◇ |
| Tuesday: | NONE ◇ | NONE ◇ | 04:30 PM ◇ | 07:00 PM ◇ |
| Wednesday: | NONE ◇ | NONE ◇ | 04:30 PM ◇ | 07:00 PM ◇ |
| Thursday: | NONE ◇ | NONE ◇ | 04:30 PM ◇ | 07:00 PM ◇ |
| Friday: | NONE ◇ | NONE ◇ | 04:30 PM ◇ | 07:00 PM ◇ |
| Saturday: | 01:00 PM ◇ | 02:00 PM ◇ | 03:00 PM ◇ | 05:00 PM ◇ |

Authorized By: * Please enter your individual user code or initials for Audit History record.

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Save