TUOTEMPO TUTORIAL GUIDE

INTRODUCTION: SELECT YOUR AGENDA

IF YOU ARE ALREADY USING AN ELECTRONIC DIARY AND YOU ARE SATISFIED, THEN OUR SERVICES WILL ADAPT PERFECTLY TO THE WAY THAT YOU WORK. WITH THE HELP OF TUOTEMPO SINCRO YOU CAN USE TUOTEMPO MEMO OR TUOTEMPOWEB WHILST WORKING AS YOU NORMALLY DO. REFER TO "PART 1B TUOTEMPO SINCRO" FOR FURTHER DETAILS.

IF YOU ARE NOT USING AN E-DIARY, THEN THIS IS THE PERFECT MOMENT TO START USING ONE. TUO TEMPO CALENDAR IS AVAILABLE ONLINE ALLOWING YOU TO RECEIVE SIMPLY AND DIRECTLY ALL APPOINTMENTS WITH YOUR PATIENTS AND CLIENTS.

PART 1.A TUOTEMPO ONLINE CALENDAR: TUOTEMPO AGENDA

BEFORE ENTERING APPOINTMENTS INTO AN ELECTRONIC CALENDAR IT IS IMPORTANT TO UNDERSTAND BOTH THE SERVICES ON OFFER (SERVICES) AND THEIR PROVIDERS (RESOURCES). ENTERING APPOINTMENTS THEN BECOMES QUICK AND EASY TO DO.

DESCRIBING THE SERVICES OFFERED AT YOUR CENTER?

The label "Services" encompasses the different kinds of appointments offered at your Center. Services have a **Name** (e.g. "First appointment") and a predefined **Duration** (e.g. 45 min.). Establishing a predefined duration for each service helps speed up the process of entering appointments by eliminating the need to enter an end time for every appointment booked. Some appointments might require more or less time than the predefined duration. For this reason it is possible to override the predefined duration at the time of booking.

Here are some tips to help you set up an easy-to-use and efficient list of services:

1. Your list should include the services that are booked most often as well as those with different durations.
   a. Include all types of appointments that are booked most often (i.e. at least twice a week).
   b. It is also useful to include the types of frequently booked appointments that have different durations. For example, differentiate the First Appointment from the

Follow-up Appointment if the first lasts 45 min. while the second lasts 30 min.

2. If possible, avoid over-differentiating the types of services.

   a. If two types of services are similar and have the same duration, it is best to differentiate them only if it is necessary to keep track of the differences between them. For instance, account for two similar kinds of Ultrasound appointments that have the same duration only if the Physician wants to know in advance which kind of Ultrasound was booked or if administration processes them differently.

   b. Remember that you can always add information in the Notes section of the booking to specify any particularities about a specific appointment.

3. Include an "Other" entry in your list for less frequently booked appointments

   a. A generic field can be used for all appointments that fall outside the pre-established list. Their duration can be indicated at the time of booking. Any further details about the booking can be entered, as mentioned above, in the "Notes section" of the booking itself.

4. The most frequently booked service should be placed first on the list.

   a. It will appear as the default selection at the time of booking.

      - Specialized clinics (e.g. Dental Clinic, Gynecological Clinic, etc.) may list the services offered directly in the pre-established list.

      - Centers that offer different kinds of services (e.g. Multi-Specialty Medical Clinics or Health and Beauty Spas) should organize the types of appointments offered into subgroups so that when booking an appointment with a Cardiologist, for instance, the operator will look through only the list of Cardiological services.

For both of these cases select **Manage Services** from the **Control Panel** and then select the example group of services labeled "Specialization." The Specialization group contains a few example Services:

SPECIALIZATION

"Example group of services"

1.	First appointment	45 min
2.	Follow-up	30 min
3.	Treatment A	30 min
4.	Treatment B	45 min
5.	Treatment C	60 min
6.	Other	15 min

Rename "Specialization" with the name of the specialization practiced at your center (e.g. Dentistry) and replace the example services with the ones you offer by simply writing over the existing names. Click **Add** to add other Services. To remove one of the services, simply delete the text (e.g. by deleting "Treatment C" and then saving, this service will disappear from the list).

Here are the resulting modifications:

DENTISTRY

"List of Services"

1.	First appointment	45 min
2.	Follow-up appointment	30 min
3.	Simple Extraction	45 min
4.	Complex Extraction	60 min
5.	Hygiene	45 min
6.	Root Canal	15 min
7.	Other	15 min

If there are several specializations practiced at your center, you can add new groups of services by clicking **add** and then following the instructions above. Assigning Groups of services (services offered) to their respective Resources (the person who performs the service) will be explained in the paragraph entitled "Adding a Resource".

DESCRIBING THE RESOURCES AVAILABLE AT YOUR CENTER

Resources are people or instruments that perform services at your Center on an appointment basis. They can be Physicians, Professionals, Diagnostic instruments, Therapeutic instruments, etc.

BEFORE GETTING STARTED: ORGANIZING YOUR CALENDAR

Before adding a new Resource you must decide in which Calendar it belongs.

- If your center has less than 6 or 7 resources, we recommended entering all Resources into the existing Calendar. By doing so, the resources will be added automatically.
- If your center has more than 6 or 7 resources, it might be best to create several calendars and to distribute your resources across them accordingly. In doing so, your calendars will be more organized and easy-to-manage. Furthermore, in doing so, each calendar can be more easily assigned to different operators.
    a. If your center operates under one roof, you can create one agenda for each specialization practiced. A medical clinic for instance can have one agenda for each specialization (Cardiology, Dermatology, Dentistry, etc.) while a Beauty Spa can have one agenda for each type of treatment (e.g. Facials, Body treatment, Fitness, Sauna, etc.).
    b. If your organization operates in several centers, it is possible to create an agenda for each center. For example, a company that manages Medical Clinics located in different cities could create an agenda for each location

In both of these cases, in order to create a new Agenda, select **Manage Agenda** from the **Control Panel** and then click on the **Add** button. Now enter the name of the Agenda (e.g. Cardiology). It is now possible to add resources (e.g. Cardiologists) to the Agenda. When a Resource is added, it is entered automatically into the corresponding Agenda.

ADDING A RESOURCE

From the **Control Panel** select **Manage Resources.** Click **Add** and then enter the following information in the main tab:

Name	Name of the Resource. We recommend using initials for the given name(s) and using the complete family name. *e.g.* Dr. J. Smith
Address	Postal address of the resource
Email	Email address for the resource. This allows them to receive not only their personal password but also all information concerning their appointments and their schedule for the following day.
Cell phone	Cell number for the resource. This allows them to receive not only their personal password but also all information concerning their appointments and their schedule for the following day.
Receive next day's agenda	Send the Resource an email or an SMS message containing their schedule for the following day.
Approval Required	By selecting this option, all appointments for this resource will be given by default a "pending" status, until manually confirmed by an operator.
Start	Start time for the workday.
End	End time for the workday. Breaks or other intervals in which work should not be scheduled (e.g. from 12 noon to 1:30pm) must be entered into the system only if it is possible for clients and patients to book appointments online on their own. Such breaks can be described by indicating an ongoing unavailability interval directly on the calendar (see paragraph on unavailability).
Start Day	First day of the week in which the resource is available. *e.g.* Monday.

Days	Number of days that the resource is available to work, including the Start Day, regardless of intervals. For example, if a Physician works Monday, Wednesday and Friday, "Monday" will be selected as the Start Day and "5" as Days. The unavailability of Tuesday and Thursday can be entered directly into the Calendar (see paragraph entitled "Indicating unavailability").
Active	Indicates whether this resource is available or not. In case of temporary unavailability of a resource, it is possible to suspend this value by rendering it invisible without having to delete its settings.
Agenda	Allows you to choose one or more agendas in which to enter this resource. If you only have one agenda, it will be selected automatically.
Access type	If the resource is a person (for instance a physician), it is possible to grant them access to the calendar so that they can see their appointments from home or when they are on vacation. Access can be set to **View Only** so that the Resource may **only** view their appointments from the Internet. Access can be set to **Operator** so that the Resource may not only view but also add or modify their own appointments from the Internet.
Password	Allows you to create a new password for the Resource. Alternatively, a password can be generated automatically by the system. In both these cases, the password created can be sent to the Resource either by email or SMS message.

HOW TO ASSIGN A GROUP OF SERVICES TO THE RESOURCE?

Select the tab "**Group of Services**" to choose one or more groups of services offered by this Resource. If you only have one Group of Services, it will be selected automatically. you can also change duration and price of a specific service if the Resource you are adding has time and costs different from the standard.

HOW TO ENTER THE RESOURCES' UNAVAILABILITIES?

Unavailabilities are entered as appointments without clients.

In the main menu, at the top of the screen click **Book** to display the calendar.

In the schedule grid, each row corresponds to a resource and each column corresponds to a certain time (at intervals of either 10 or 15minutes). To enter a new unavailability, simply click on the cell in the grid that corresponds to the desired resource (row) and starting time (column) for the unavailability in question. A popup window will appear.

1. In the schedule grid, each row corresponds to a resource and each column corresponds to a certain time (at intervals of either 10 or 15minutes). To enter a new unavailability, simply click on the cell in the grid that corresponds to the desired resource (row) and starting time (column) for the unavailability in question. A popup window will appear.
2. In this new window you can select and save the unavailability's end time. When the system does not find a client associated with the appointment, it will automatically create a grey coloured space that represents an interval that cannot be used to book appointments.

Repetitions: use this feature to create repeat unavailabilities at specific intervals (for example, every Friday, every 3 days, the first Tuesday of each month). Alongside the chosen period of repetition (weekly, monthly etc), it is necessary to specify the date for the end of the repeated unavailability.

PART 2. ENTERING APPOINTMENTS

USING AN ELECTRONIC CALENDAR SHOULD BE AS EASY AS USING A PAPER ONE. COMPLETE THE INTIAL SET UP PROCESS AND YOU TOO CAN START EXPERIENCING THE ADVANTAGES OF AN EASY-TO-SHARE CALENDAR THAT GENERATES AUTOMATED MESSAGING, THAT IS MORE READABLE AND THAT PROVIDES STATISTICS ON YOUR APPOINTMENT ACTIVITY.

ENTERING A NEW APPOINTMENT

Click on the "**Book**" tab.

1. In the schedule grid, each row corresponds to a resource and each column corresponds to a certain time (at either 10 or 15min. intervals). To book an appointment, simply click on the cell in the grid that corresponds to the desired resource (row) and start time (column) for the appointment in question. A popup window will appear.

2. Select the desired service. The end time for the appointment will be calculated automatically based on the start time selected and the predefined duration of the chosen service. If necessary, select a different duration for the appointment.

3. Choose the client's name from the drop down menu. If the name of the client or patient is not yet in the list, you can add them in by clicking on the "new patient" link. See the next paragraph "**Adding a client**" for more details.

Other options:

- **Status (Approved / to be approved)**: by selecting the "to be approved" option, the timeslot will be put on hold until confirmation is received. In the meantime, it will not be possible to book other appointments in the timeslot in question. You can use this option, for instance, if you need to contact the Doctor before confirming the appointment. Pending appointments will be displayed on the "control panel" page.

- **Repetitions**: use this feature to create repeat appointments that recur at given intervals for a given client. For example, an appointment that must be booked every week can be set to occur every Monday, or in the case of a monthly appointment, it can be set to occur on the 2nd day of every month. Set a date for the end of the repeat appointments.

- **Callbacks:** By selecting this option, a message will be sent to the patient after a certain amount of time has elapsed since his last appointment so that he may remember to book his next one.

- **Notes:** If a note is added to the booking (click on the link to expand the editing box), it can be viewed from the schedule page by placing the mouse over the corresponding timeslot, thereby activating a tooltip. The note can also be attached to the emails and text messages that are sent to clients and resources. See paragraph “Changing the default text in messages” in Part 2 for further details.

ADDING A NEW CLIENT OR PATIENT

In order to enter appointments and send messages to clients or patients, a profile containing their personal and contact information must be created.

The Calendar is designed to be adaptable to your needs. For example, if you only intend to send reminders, you can choose to enter only First Name, Last Name and either a home number, cell number or email address for your Clients. If, on the other hand, you wish to activate other available functions, you can fill in other fields such as birth date, sex, address and password for online booking.

Clients can be added to your Address Book either One-at-a-time or All at once. If you do not already have a file containing a list of your existing clients, we recommend adding them One at a time.

One at a time

a. Directly from the Appointment Entry window

   i. When booking an appointment for a client who is not already present in your system, we recommend following the regular appointment entry process and then clicking on the **New Client** link from the window that has popped open.

b. From the main menu

   i. If you would like to add a new client without necessarily booking an appointment for them, click on the **New Client** tab at the top of your Calendar page.

In both of these cases a new window will pop open.

1. Enter the client’s personal information. Either an email address or a cell number must be entered in the “New Client” form. By checking the appropriate box, one of the two may also be used as a "user name" for the client during the log in process. If only a home number is provided, tuOtempO will send voice messages instead of text messages.

2. Your clients can book their own appointments online. They must be assigned a password in order to access the system. Passwords can be generated either automatically or manually and must contain at least 6 characters. Check the appropriate box if you would like for the password to be sent automatically to your clients by email and/or text message.

3. Check the “privacy” box if the client has authorized you to send them messages. If the box is left unchecked, the application will not send unauthorized messages to this client.

4. Select the preferred means of communication: email and/or Sms/Voice. As mentioned above, if a cell number has been provided, the system will at least send text messages.

5. Click on the **Save** button (click the Close button to exit without saving changes made to the profile)

All at once

If you already have a file containing a list of your existing clients, you can import this list in few steps: Technical assistance may be required.

1. Select **Import Users from File** from the Control Panel.
2. Download the template CSV file and open it in excel or other CSV editor
3. Follow the example, replacing the existing data with your Clients’ without modifying the structure of the document (columns, titles, column’s order, etc.)
4. Save it in CSV format and upload it.

Finally, if you choose to activate online booking, you can also allow clients or patients to register themselves on your web site page. In order to allow or inhibit this online registration, modify the relative option on the booking schedule grid. (Go to Part 3 of this instruction manual for further information).

PART 1.B TUOTEMPO SINCRO

IF YOU ARE ALREADY USING THE CALENDAR SOFTWARE INCLUDED IN YOUR MANAGEMENT SOFTWARE AND YOU ARE SATISFIED WITH IT, YOU CAN ACTIVATE TUOTEMPO'S SERVICES WITHOUT HAVING TO CHANGE THE WAY YOU WORK. YOU CAN KEEP ENTERING APPOINTMENT IN YOUR EXISTING SCHEDULING SOFTWARE AND TUOTEMPO SINCRO WILL TAKE CARE OF THE INTEGRATION WITH TUOTEMPO'S SERVICES. IT IS THEN NECESSARY THAT YOUR MANAGEMENT SOFTWARE SHARES SOME INFORMATION WITH TUOTEMPO.

WHAT INFORMATION WILL TUOTEMPO TAKE FROM MY MANAGEMENT SOFTWARE?

tuOtempO will only import data that are strictly necessary in order to provide useful communication and booking services that benefit clients, patients and doctors. This data are read from your database through tuOtempO Sincro, a software tool to be installed in the computer that holds your management software.

tuOtempO Sincro enables you to choose which data will be imported. There are only 2 pieces of information that are strictly necessary to access tuOtempO Memo and tuOtempO Web services:

- "Telephone number or E-mail of client" and "Date and time of appointment"
- This information is usually kept until the appointment date.

tuOtempO Sincro is capable of extracting further information and to save it for longer. Clearly, the more information you download and save, the more you can personalize communications and services. Table 1 contains a complete list of the information and relative services that you can download.

TABLE 1. DATA TO BE ACQUIRED AND RELATED FEATURES

INFORMATION	DESCRIPTION	EXAMPLE	OPTIONAL OR NECESSARY?	DATA SENSITIVENESS	SERVICE LIMITATIONS (IF DATA IS NOT ACQUIRED)
Client or patient's ID	Full name (or Code)	Joe Smith	Optional. Can be imported as a code (e.g.: client 343454).	Low. Merely personal, non-sensitive data.	If only a code is acquired instead of the full name: -it will not be possible to include the client's name in messages (e.g.:, "Dear Mr. Joe Smith, we are glad to remind your appointment…") - it will not be possible to send messages to a single client or patient by selecting his name. -Doctors (or other resources) will not be able to read the patient/client's name when browsing their online schedule or when receiving their next day's schedule by SMS text message.
Contact details	Home telephone number, cell phone, e-mail or fax	051232434; 334565765; joe@gmail.com	It is essential to provide at least one contact data.	Low. Merely personal, not sensitive data.	Data is essential for providing the service.
Other client/patient information	Date of birth, sex, address etc.	10.02.1964; M, London,	Optional	Low. Merely personal, non-sensitive data.	Without this information it will not be possible to send information to specific groups of patients/clients (eg. "Women" or people "born after…") for example to inform about a new service .
Date and time of appointment	Date and time of appointment	2/06/08 16:30	Essential	Low. Non-sesitive data.	Always present. Essential

Client's privacy Status	Authorization to use personal information and to send messages.	Yes or No	Essential	-	Data is essential for providing the service. Only clients who provided authorization will be sent bmessages
Name of hospital or pratice.	Name of the center where the appointment takes place.	"Salus" Private Clinic	Necessary	Depends. It can be high level if a medical condition can be guessed from this data.	Data is essential for providing the service.
Resource's name (Doctor, professional diagnostic instrument, etc.)	Name of service provider (e.g.: Doctor)	Dr E.Grey	Optional. Can be aquired as a code (e.g.: resource 23).	Depends. It can be high level if a medical condition can be guessed from the resource's name.	If not present, it will not be possible to include the resource's name in messages (e.g.:, "…your appointment with Dr Grey …")
Activity / Service	Name of service or activity	CT scan	Optional	High. Sensitive data.	Doctors or assistants will not be able to see the name of activities associated to each appointment in the online schedule or when receiving their next day's schedule by SMS text message.

PARTE 2. ACTIVATING COMMUNICATION WITH CLIENTS AND PATIENTS

BEFORE, DURING AND AFTER AN APPOINTMENT TAKES PLACE THERE ARE MANY IMPORTANT DETAILS TO COMMUNICATE TO YOUR CLIENTS AND PATIENTS. EVERY CENTER HAS DIFFERENT NEEDS. THAT'S WHY WE MAKE IT POSSIBLE FOR YOU TO DECIDE WHAT, HOW AND WHEN TO COMMUNICATE WITH YOUR CLIENTS AND PATIENTS.

HOW DO I SET COMMUNICATION RULES?

Select **Communication** from the **Control Panel.**

The types of messages you can send to your Clients/Patients and Resources are broken down into 4 categories: Receipt, Reminder, Notification and Message to resources (internal messages).

WHICH KIND OF COMMUNICATION CAN I SEND AND HOW?

The first step is deciding **which types of messages you wish to activate and whether they should be sent by SMS, Voice message or email.**

Notifications

These messages are sent whenever an appointment is created, modified, confirmed or cancelled. Their purpose is either to confirm that an appointment has been booked or to inform those affected that the appointment has been modified or cancelled. They are useful, for instance, in letting clients who book online know that their appointment has in fact been entered into the system.

Reminders

These messages help prevent forgotten appointments. You can remind your clients/patients of an existing appointment (**Appointment Reminder**) or you can remind them that a certain amount of time has elapsed since their last appointment and that it is time to book their next appointment (**Booking Reminder**).

Alerts

These messages **immediately inform** your clients/patients of delays or cancellations that might be caused by **unforeseen events**. If a Resource (Physician or Professional) is running late, you can inform **today's clients** to show up at a revised time, taking into account the **delay** in question. If a Resource is suddenly unavailable for their next day's appointments because of illness or unforeseen events, you can send a **cancellation notification** to immediately inform all clients affected, allowing you to take the time to call each one and reschedule later. Both of these messages can be sent by clicking on the "**Delay-Cancellation**" link below the Resource's name.

Messages to Resources

These are messages that are sent to the resources to remind them of appointments or to notify them of new appointment that have been made by clients/patients on the internet. These reminders can be useful for example to notify forthcoming appointments to resources working only on an irregular basis or offering home services. In the case of home services, it is thus possible to communicate the place and details of the appointment. The notification of new appointments can also be used to remind the person who manages the agenda (operator or resource), that a patient or a client has just made an appointment, including appointment information..

You might choose, for instance, to send all Receipts only by email (to clients/patients who have supplied an email address) and to send Reminders and Notifications by SMS (to clients/patients who have authorized their use). Check or uncheck the relative boxes to activate or deactivate the service in question.

CHANGING THE DEFAULT TEXT IN MESSAGES

The second step is deciding whether or not to change, or customize, the default text of the various types of messages. Select a type of message, such as "Appointment Reminder" for example, to view the editor and preferences for this type of message. You can customize the content of either SMS messages or emails by selecting the appropriate tab.

Let's see, for instance, how one could customize the text contained within Appointment Reminders sent by SMS:

Enter the text that should **replace** the default message by typing it directly into the editor. For instance, you can replace:

"REMINDER: APPOINTMENT WITH [TRD0] ON [TRD8] AT [TRD9]."

with

"DEAR PATIENT, DR. LLOYD'S OFFICE WOULD LIKE TO REMIND YOU THAT YOU HAVE AN APPOINTMENT ON [TRD8] AT [TRD9]."

An SMS can contain a maximum of 160 characters (messages longer than 160 and up to 612char. will be sent as a group sms, where this service is available). The character counter below the editing window shows us that there are 53 characters still available. You can further personalize the message, for instance, by **inserting the client/patient name**. To do this, from the **Customize Message** drop down menu, under **Client**, select [TRD3] – First Name.

A brief text will appear informing us to **select, copy and paste** (or select and drag) the code in question [TRD3] into the message. After doing so, hit **Save**. Typing this code [TRD3] manually into the message will have the same result:

> "DEAR [TRD3], DR. LLOYD'S OFFICE WOULD LIKE TO REMIND YOU THAT YOU HAVE AN APPOINTMENT ON [TRD8] AT [TRD9]."

In a similar way, it is possible to attach the "notes" to the message, for additional information about an appointment, using the parameter (TRD14). For example, in using the notes, we can communicate specific instructions to a patient that are needed before undergoing a medical exam. Furthermore, it is possible to communicate to the resource the address of the home visit.

> "DEAR [TRD3], DR. LLOYD'S OFFICE WOULD LIKE TO REMIND YOU THAT YOU HAVE AN APPOINTMENT ON [TRD8] AT [TRD9].- NOTES:[TRD14]"

The last step is deciding how much time in advance the reminder should be sent. You can do so by selecting the desired advance warning from the drop down menu below the editing window. Let's imagine that we want to keep the default selection, which is 24 hours in advance.

From the moment you click **Save,** the system will automatically send, 24 hours prior to every appointment, an SMS containing your customized message, replacing the codes you inserted with the appropriate values. For example, your client, Joe Smith will receive this SMS:

> "DEAR **JOE**, DR. LLOYD'S OFFICE WOULD LIKE TO REMIND YOU THAT YOU HAVE AN APPOINTMENT ON **5/5/2008** AT **11:30** – NOTES: **NO FOOD OR DRINKS 12H PRIOR TO TEST**"

HOW CAN I RECEIVE A CONFIRMATION OR CANCELLATION REPLY TO AN SMS REMINDER?

Enter the section "**To remind an Appointment**" and, in the sms edit tab, select "**Receive SMS replys**". This option allows you to receive replys to sms reminders. For example, it can be useful to receive cancellations via sms from clients or patients who are not able to make their appointments. This service is available in Europe and in many countries in North and South America and in Asia. Check with technical support before activating.

PREFERENZE GENERALI

PERSONALIZE SENDER	Allows you to personalize the sender of your messages. A maximum of 11 characters can be used for the sender. Although this is currently a free function, as of July 1st 2009, there will be a supplement of 0.2 Credits charged for messages sent with personalized senders.
SEND ONLY IF PRIVACY OK	By selecting this option, the system will refrain from sending any message whatsoever to clients/patients who have not yet authorized the processing of their personal information.
GENERAL SWITCH FOR ALL AUTOMATIC SMS, VOICE, EMAIL	Switch all communications on or off, regardless any preferences for each message.

SENDING THE SAME MESSAGE TO A GROUP OF CLIENTS/PATIENTS

From the **Control Panel** click on the **Send Bulk Messages** link.

The **Send Bulk Messages** page allows you to compose a new message and to send it to a group of users. You can select the recipients' names from your Client/Patient or Resources list.

Here are just a few examples in which this tool could come in handy:

- Inform users of holiday closures or of changes to business hours.
- Inform users of a change of address or phone number
- Announce the launch of a new service or an event (e.g. prevention month)
- Send Holiday Wishes

Step 1: **Compose your message**.

Compose either an SMS or an email by selecting the appropriate tab. For more details on how to compose a message, please refer to the "<u>CHANGING THE DEFAULT TEXT IN MESSAGES</u>" paragraph above.

Step 2: **Send yourself the message as a test** to make sure that everything is in order. Remember that if in the message you composed, you typed codes pertaining, for example, to the client's name, upon reception, those codes should be replaced by your own name.

Step 3: **Decide who to send it to** You can either send it to all your contacts or you can select recipients one by one.

To send the message to **all your contacts**, simply click "Send to all." A brief message will appear informing you of the number of messages that will be sent. This number takes into consideration only those Clients/Patients that have the communication prerequisites to receive such a message, i.e., a cell number or valid email address.

If you want to **select the recipients** of your message, click on the "Select Recipients" link. A list of all your contacts will appear. You may now proceed in one of three ways: using a list you already have, conducting a search based on a specific criterion or scrolling through your list of contacts.

- **Using a list of recipients you already have**

  Let's imagine, for instance, that you have a list of contacts who should receive your message, but that the members of this list were not selected according to any specific criterion. This might be, for example, a set of people whom you wish to inform of an administrative deadline or who should all be informed that a certain document is ready.

  The best way to do this is to search for each patient by typing the first letters of their last name into the Search function (Search All or Search Last Name). Check the box to select the desired contact and then send the message you have already composed by clicking "Send to Selected." You can now search for the next recipient and proceed as described above.

- **Creating a list of recipients based on a search for a specific criterion.**

  Let's imagine for a moment that your center has introduced a new therapy or treatment for patients over 50. In order to let potentially interested or eligible clients/patients know, we must first identify all those who were born prior to 1948.

  From the drop down search menu, select "Date of Birth." Two date fields will appear. In the "From" field, enter 1/1/1910 (it's far enough away) and in the "To" field, 1/1/1948. Now click "Search." The system will identify all those who satisfy the criterion we have chosen and it will also tell us how many there are. Now click "Send to all" for all of them to receive the message you have composed.

It might be necessary in some cases to go through the list and manually exclude some clients from the mailing. If so, remember that results are shown in groups of 100 clients per page and are in alphabetical order. Click "All" in the "Select" column to select all the contacts listed on the **current page** and then proceed to deselect manually those you do not wish to send the mailing to.

Remember that for security reasons, your selections will **not** be saved if you go to the next page before having sent the message to the contacts on the current page.

Now click "Send to selected" to send the mailing to all the selected recipients listed on the current page and then proceed to the following page.

- **Select your recipients by scrolling through your list of contacts.**

Sometimes it is necessary to send a mailing to clients selected directly from your list of contacts. Let's imagine, for example, that you would like to send a booking reminder to all those clients for whom you do not have a last appointment date on file. The only way to do this is to scroll through page 1, which contains the first 100 contacts, and select those who should receive the message. Click "Send to selected" before proceeding to the following page.

Remember that for security reasons, your selections will **not** be saved if you go to the next page before having sent the message to the contacts on the current page.

PART 3. TUOTEMPO WEB. HOW TO RECEIVE BOOKINGS VIA INTERNET.

TO RECEIVE BOOKINGS VIA INTERNET YOU NEED TO COMPLETE 4 STEPS:
1) CHOOSING WHICH ACTIVITIES ARE FOR BOOKING,
2)PERSONALISING THE SELF-SERVICE BOOKING MODULE,
3) INSERTING THE MODULE INTO THE WEBSITE AND THEN
4)INFORMING EXISTING PATIENTS OR CLIENTS. TUOTEMPO WEB WILL HELP YOU IN EACH OF THESE 4 STEPS.

HOW DO I SELECT THE ACTIVITIES TO BE BOOKED VIA INTERNET?

The decision to be made is whether to show all the activities, to make a selection or to personalize them. If they are simple and clear, you might decide to make patients or clients using the same activities which assistants use internally when taking appointments by telephone or in person. In this case, you are ready.

However, you may happen to use internally some specific activities that, due to their duration or characteristics, are only understandable for an internal assistant. It is important to emphasise that the Internet compliments rather than substitutes traditional channels. It can also be useful to use internet for the booking of less complex appointments, which are also more common (e.g. the first and last check-up)

> Just as it happens for the other bookings, people who want to book a hotel room in central Rome can do so by Internet and those who want breakfast served on their bedroom terrace overlooking the Colosseum, are aware that they must telephone.

The activities that the patient or client are able to book online belong to a **Group of Bookable Online Activities**. In order to create a group of bookable activities, go to the **Control Panel** and click **Manage Services.** In the list select " Bookable via Web" for the group that you want to show. The icon indicates that the group is bookable.

In order to present the patient or client with a group of activities that is different the those used by the assistant, go to the **Control Panel**, click **Manage Services** and then add a new group of activities (for example, "Cardiology web") inserting simplyfied activities that your patients and clients will see. Remember that it will be necessary to associate these new groups of appointments with the resourses that offer them. The creation of groups of activities (what is on offer) that benefit the resourses (who offers it) is explained in the paragraph " Adding a resourse".

HOW TO PERSONALIZE THE SELF-SERVICE ONLINE BOOKING MODULE?

Select **Control Panel** in the main menu and then select **Online Booking**.

This page allows the personalization of the booking form that your patients or clients will use to book appointments on your web site.

HOW TO MODIFY THE CRITERIA USED IN CHECKING AVAILABILITY

The easiest way for patients and clients to book an appointment is to allow them to choose their preferences and then to show them your availability, as it is done in hotel, train, flight bookings etc. Therefore, the first decision to take is about which preferences that the patient or client can have. The service offers 5 different search criteria that can be switched on or off in order to adapt the availability research to your working style.

CRITERIA	DESCRIPTION	EXAMPLE	ORDER Given values	VISIBILITY
AGENDA	The calendar allows for the regrouping of resourses, which can be regrouped as work places (head office, room etc) or by the type of activity (specialization) or by both (a specialized activity of the head office).	Example 1: Salus Clinic – Roma. Igea Clinic – Florence etc. Example 2: Room1, Room2, Room3 etc. Example 3: Steam room, Fitness area, Body massage room, Facial massage room etc. Example 4: Cardiology, Dermatology etc.	1 This is always the first option (if you decide to show it). If you only have one agenda it is not necessary to show it.	Optional search criteria. 1 = visible 0 = not visible
SERVICE GROUP **(Activity group)**	The activity group is a list of activities offered by one or more resourses.	Example 1: Cardiology, Dermatology etc. Example 2: Body treatments, Facial treatments.	Aways in second place. If you only have one group, then it is not necessary to choose this option.	Optional 1 = visible 0 = not visible

SERVICES (Activities)	Activities describe the services offered during the appointments.	Example 1: First visit, Check-up, ECG, EcoDoppler, etc Example 2: Facial treatment, Facial massage, Deep cleansing, etc.	Can be in the third or fourth position, but always depends on the group activities (if shown).	Compulsory filter. 1 = visible.
RESOURCE	Resourses are the professionals who offer the activities, or the instruments that are used.	Example 1: Dr. Mayer, Dr. Martins, Dr. Gonzales Example 2: Sunbed, Turkish Bath.	Can be in the third or fourth position, but always depends on the group activities (if shown).	Optional 1 = visible 0 = not visible
DATE	Enables the choice of date preferences .	Example 1: As soon as possible. Example2: Only the afternoon from 13:00 onwards…	Can be in third , fourth or fifth position.	Optional 1 = visible 0 = not visible

By changing the values under Order and Visibility, you can see in the preview window located on the right side, the sequence of research criteria which the patient or client would see in the search form.

HOW TO CHOOSE OR MODIFY AN ASPECT OF THE SEARCH FORM

The appearance of the search form results from the font, the color of the letters and the background color. Therefore, if this search form is to be located inside your web site it is important that it is adapted to your style and colors.

To personalize your search form, select the **Control Panel** in the Main Menu and then click **Online Booking**. Above the Preview Window option on the right hand column is a list of available styles.

Customize the style in use). Da questo menu a tendina, infatti, è possibile selezionare i vari elementi del modulo di prenotazione e poi, cliccando sul tasto **Colore(Color),** assegnare a ciascuno di essi il colore desiderato.

If the selected style is still not in keeping with the colors of your web site, you can also personalize the style by selecting the menu **Customize the style in use**. From this dropdown menu, it is possible to select various elements of the booking form and by clicking on **Color** you can give each element the desired color.

Eventually, those who wish to modify radically the visual aspect of their booking form , and who are familiar with CSS (Cascade Style Sheet), can request the CSS file of style sheets via email, modify it according to their own needs and then post it back.

HOW TO MODIFY THE REGISTRATION RULES OF PATIENTS OR CLIENTS

Firstly, you need to decide whether or not to allow the self-registration of patients or clients through the **Registration Preferences** option.

> **Activate**, if you decide to limit access to internet bookings to patients or clients who are already present in the archive of your own database. In this case, only clients whom you invite, thus sending them a password by email or sms will be able to access to self-service appointment booking From **Manage clients** in **Control Panel,** you can choose from the clients list who to invite and automatically send a password to them.
>
> **Deactivate**, if you decide to accept patient or client registration directly from the web site. Both uninvited existing patients or clients and new patients or clients, can register themselves or book.

The second decision to make is whether to ask for authentication before searching or before booking (**Authentication Preferences**).

> Select **Before the search** if you decide to show the activities, availability and waiting times only to patients or clients who are already signed in.
>
> Select **Only before making an appointment** of you decide to show the activities, availability and waiting times to all the web site visitors, only recquesting authentication from the patients or clients who want to book an appointment.

HOW DO I EMBED THE BOOKING MODULE INTO MY WEB SITE?

Our booking form is a 530X570 pixel frame that you can place anywhere in your website. The HTML code to be placed in the page that will hold the booking is available on the page ONLINE BOOKING located in the CONTROL PANEL.. One example of a code is

```
<iframe id="login"
    frameborder="0"
    name="login"
    scrolling="no"
    style=" margin-left:0px; width:530px;height:570px;border: 0px;"
    allowtransparency="true"
    src="http://app.tuotempo.com/customer.php?tool=searchreservation
    s&dbName=tt_salus">
</iframe>
```

This code includes your language preference and refers to the style sheet that you selected and modified.

HOW CAN I INFORM MY CLIENTS OF THE POSSIBILITY THE BOOK VIA INTERNET?

The most efficient channel is through SMS or by email when possible. Enter in the **Control Panel** and then select **Manage Clients.**

Select the clients that need to receive the password and then click on "**Send Password**".

[TRD0] SENT YOU A PASSWORD FOR THE ONLINE BOOKING SYSTEM. LOGIN INTO [TRD19] USER:MOBILE NUMBER - PASSWORD: [TRD20].

The sent message also contains the necessary **password** for clients or patients to log in, so that they are ready to book.

This message is not available for those who do not have a cell number or an email address. If you have also decided to accept the registration application from the website, you can inform patients or clients of the new service using alternative channels. Patients and clients will be able to go on your website and register typing in email and/or cell phone number in order to receive the password.