PtMS CAPS

Client Automated Phone Communications Services

PtMS CAPS provides PtMS users with a system for automating their phone communications with clients performing the following functions:

- **Appointment Reminders** to remind clients of transportation appointments
- **Schedule Changes** such as holiday closings or emergency cancellations
- **Service Confirmation Surveys** for verifying that billed services were provided
- **Client Satisfaction Surveys** to determine if clients are satisfied with services

ABS has utilized Voicent Communictions ((http://www.voicent.com) automated phone call back technology and software as the core engine of its PtMS CAPS software. Voicent's telephone calling software, telephone gateway and text to speech engine are installed on a single computer along with the PtMS CAPS software.

PtMS CAPS users can set any tasks such as daily Appointment Reminders to run on a daily basis using a task scheduler. Other task such as Schedule Change notices, or service confirmation and client satisfaction surveys can be run on an as needed basis. However, any task can be run on demand and any task can be set to run as a scheduled task.

PtMS CAPS Features:

- Integrated with PtMS for Windows
- Standard XP workstation on PtMS network hosts the system
- Uses a standard voice modem/phone line or voice over internet such as Skype (installation includes a 1 year Skype account for placing phone calls over the Internet renewable after the first year at Skype rates (approximately $30 per year))
- Realistic text-to-speech engine allows customized reminder messages (click here for a sample reminder call message quality)
- Customization of call back time can be selected in PtMS Client Record
- Clients can be omitted from appointment reminders if desired
- Call backs can be selected by agency, trip type (e.g. demand), and others
- Reports tracking call completion and client responses are included
- Once workstation is running system is completely automated for all scheduled tasks

Selecting Clients for Automated Phone Calls:

PtMS CAPS selects client for automated phone calls based on the task type and selection criteria setup by the user. Once the client record is selected, the phone number and message type is fed by **PtMS CAPS** into the Voicent telephone Gateway software where it is queued up to place the call at the time specified in the task selected and client record.

The clients are then **automatically called** at the selected time interval and the selected message is delivered. If client responses are requested (to confirm services delivered, or record clients satisfaction with the transportation service) these responses are recorded by **PtMS CAPS** and stored in a report format for review by the user.

PtMS CAPS Client Selection Based on Task Type:

Task 1: Appointment Reminder

Appointment reminders are designed to call the client and deliver a message notifying them that they have transportation services scheduled for the next day. The message includes their scheduled pickup time for the take trip and the scheduled pickup time for the return trip.

Record Selection Criteria: Clients scheduled for transportation services the next day, demand only or all trips, selection by agencies, purpose, trip codes, and destinations.

Task 2: Schedule Change

Schedule Changes are last minute changes in a schedule requiring a set of clients to be called an notified of the change. For example, a group trip for clients going the next day may have been cancelled or scheduled for a different time or rescheduled on another day requiring a group of clients to be called and

notified of the change. PtMS CAPS can be used to deliver this type of message using the text to speech technology.

Record Selection Criteria: Clients scheduled for transportation services the next day, two days from now etc, selection by vehicle, destination, agency, etc.

Task 3: Transportation Service Confirmation and Client Satisfaction Surveys

Transportation Service Confirmation calls are designed to confirm that the client received the service that was recorded by the driver or the provider assigned to transport the client. The client is asked to confirm that they received the transportation service on a specific date by pressing 1 on their telephone keypad. The client can also be asked 1 or 2 follow-up questions regarding their satisfaction with the transportation service ("Were you satisfied?", "Was the driver courteous"?, "Was the vehicle clean?" etc).

Record Selection Criteria: Clients selected for Service Confirmation and Client Satisfaction Surveys are generally based on trip history. Select all clients transported within the last X days, or select a sample of clients (where the user indicates a number of clients to select – e.g. 100) transported within the last X days for service confirmation and survey calls.

Call Status Report

Call status is tracked for each call. Calls that fail to connect and deliver the message (e.g. no answer) will be retried automatically by the system at later time (once all the calls in the list for the selected time interval are completed).

A **Call Report showing the results of each call is available** and can be viewed as calls are in progress.

Contact ABS for a price quote at sgp@abs-pa.com or 610-572-2409.

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