



Getting Data From Your Practice Management System

Step 1: Initial Setup - 3 Month Report

This one-time-only setup helps ensure that the PhoneTree software has all the information needed to incorporate data from your appointment schedules into automated messages. Because not every appointment type or provider might be represented on your daily appointment report (for example, a certain provider may be on vacation at the time of report creation, therefore showing no appointments), you will initially set up PhoneTree to read from an appointment report showing three months of appointment information. This guide will show you how to create this report.

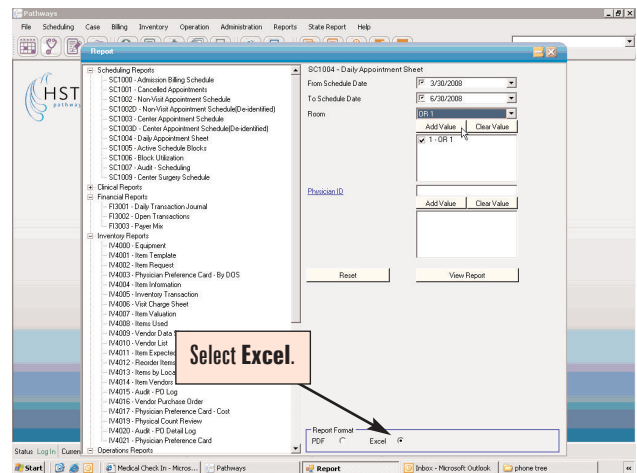
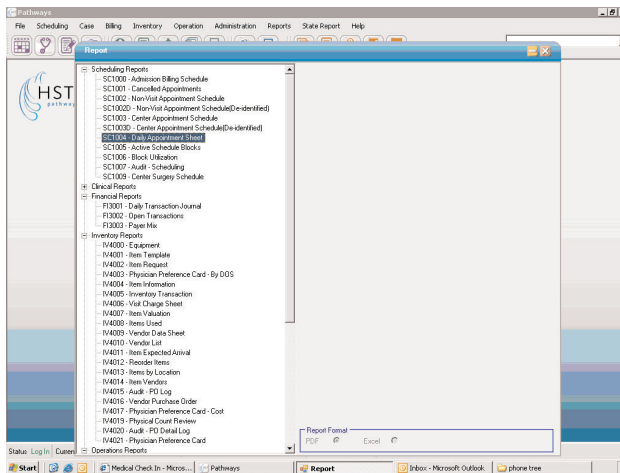
Step 2: Daily Operation - Daily Report

Once your PhoneTree system has seen all possible providers, appointment types, and other information for three months out, then you're ready to create your daily report, from which PhoneTree will make calls on a daily basis. This will be almost exactly like creating a three-month report, except that it will show appointments only for the upcoming day. It is from this report that PhoneTree will create messages each day. After your PhoneTree has been configured with a 3-month report, you will be able to import a daily report with the instructions provided here.

Getting Data From Your Practice Management System

HSP Pathways: Appointments - 3 Month Report

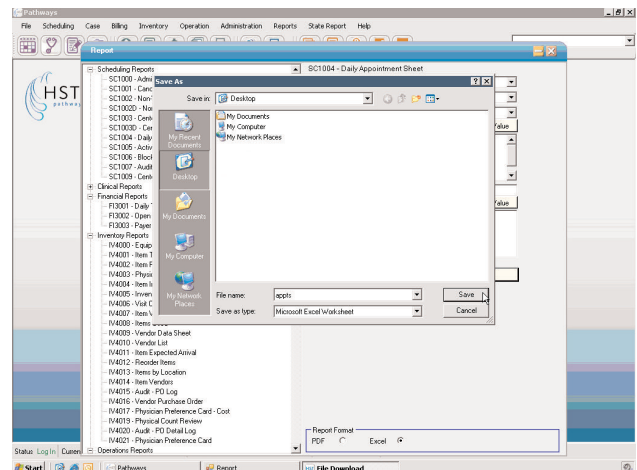
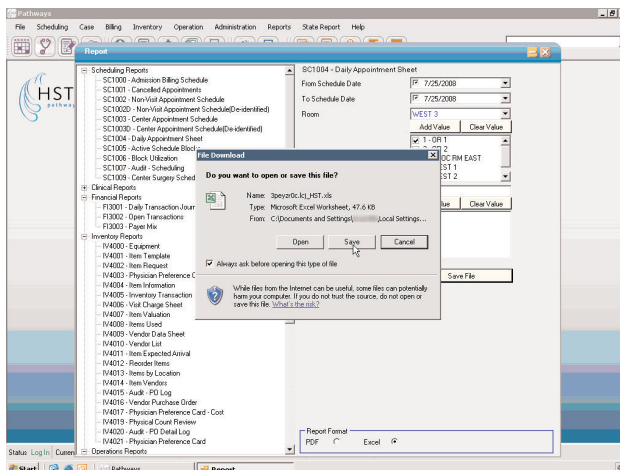
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will configure PhoneTree to read from this file. This one-time step is required for correct configuration. Here's how to do this using the HSP Pathways system:



Note: Microsoft® Excel® is required to create this file.

1. Open HSP Pathways to the main screen. Click **Reports**. Under **Scheduling Reports**, select "SC1004 - Daily Appointment Sheet."

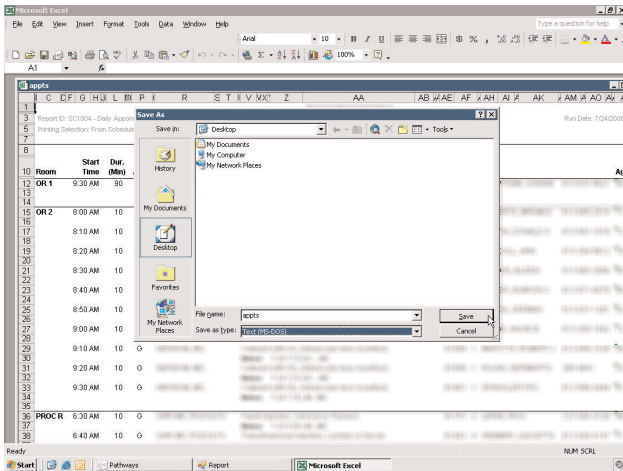
2. Enter a **3 month** appointment date range in the **From Schedule Date** and **To Schedule Date** fields. For instance, if today was 7/25/08, enter 7/25/08 in the **From Schedule Date** box and 10/25/08 in the **To Schedule Date** box. Next, click the **Room** drop-down box and select a Room you wish to contact. Then, click **Add Value**. Repeat for each additional Room. For **Report Format** (located at the bottom of the screen), select **Excel**. Now, click **Save File**.



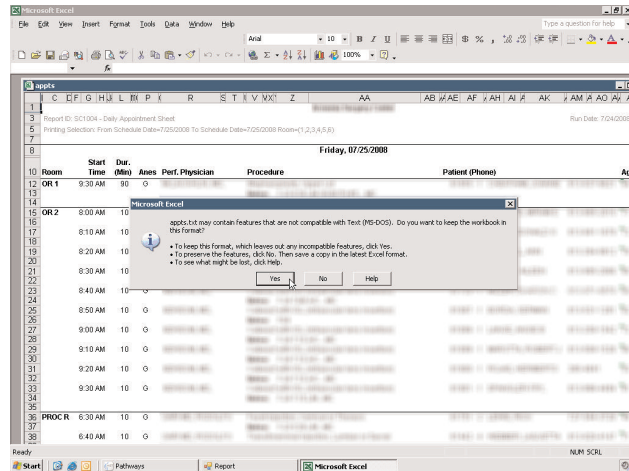
3. The File Download screen will appear. Click **Save**.

4. Choose a location such as "C:/PhoneTreeDataFile" for the **Save in** location and **appts** for the **File name**. Click **Save**.

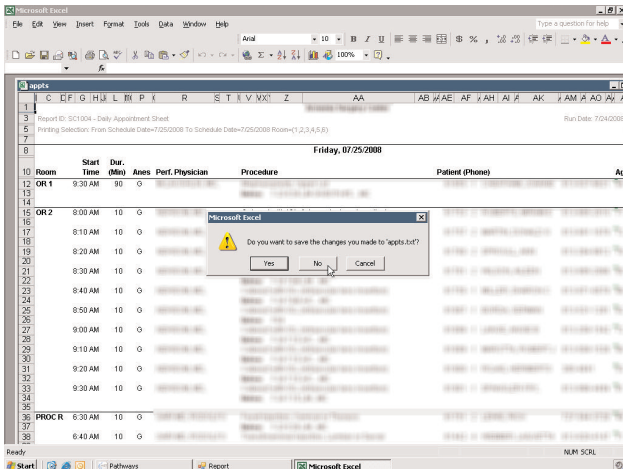
Getting Data From Your Practice Management System, continued



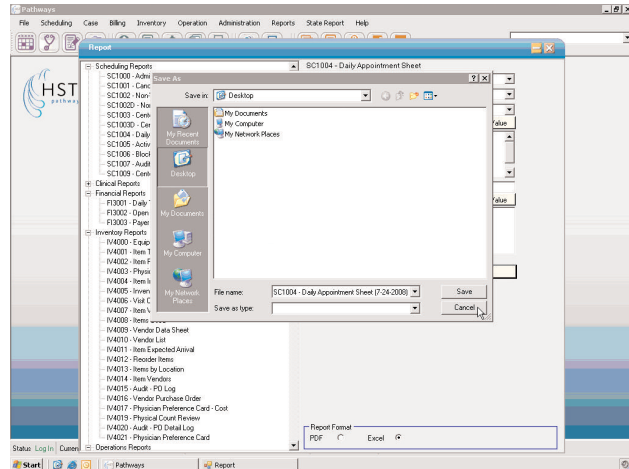
5. Once the file is finished downloading, open it with Excel. Then, click **File > Save As...** From the **Save as type** drop-down box, select "Text (MS-DOS)." Then, click **Save**. Now, exit Excel.



6. A screen will appear asking, "...Do you want to keep the workbook in this format?" Click **Yes**.



7. Another screen will appear asking, "Do you want to save the changes you made to 'appts.txt'?" Click **No**.

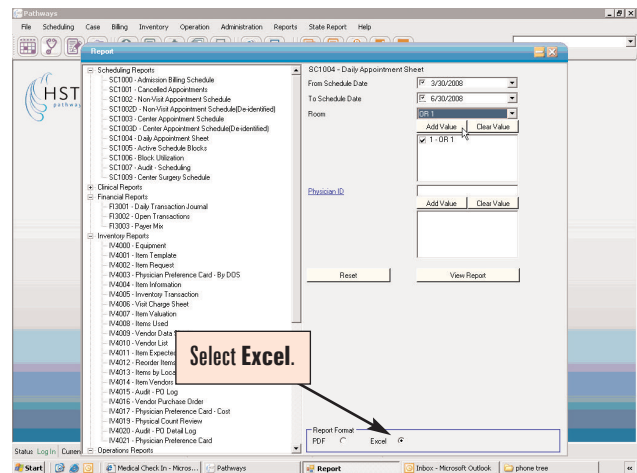
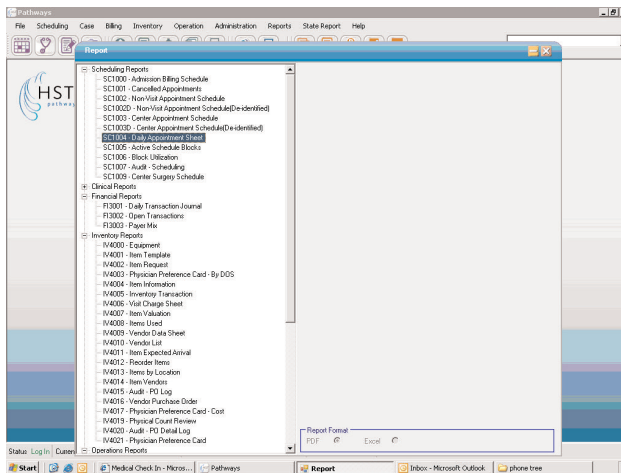


8. After Excel closes, you will return to the **Save As** screen in HSP Pathways. Click **Cancel**. Congratulations – you're done!

Getting Data From Your Practice Management System

HSP Pathways: Appointments - Daily Report

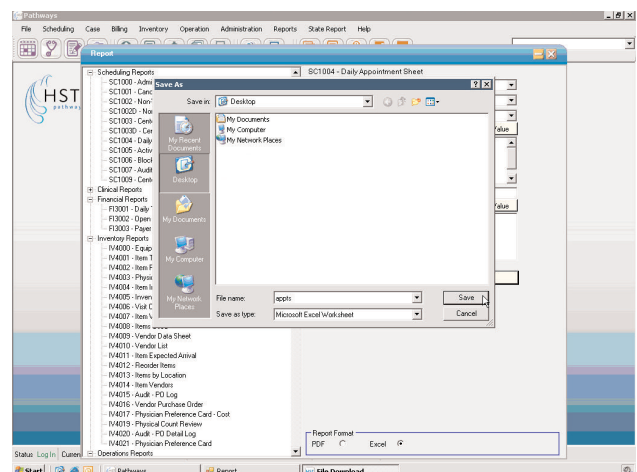
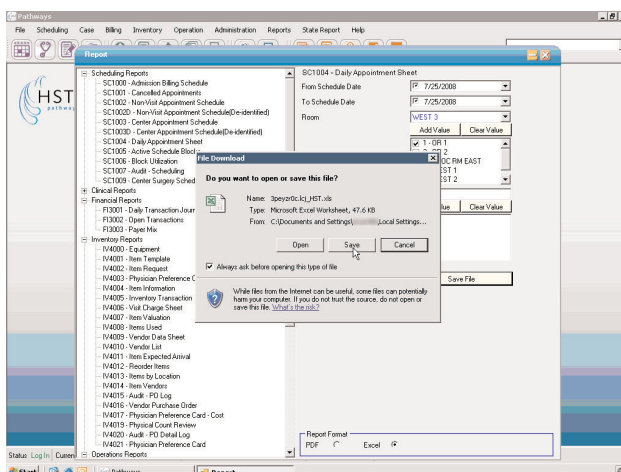
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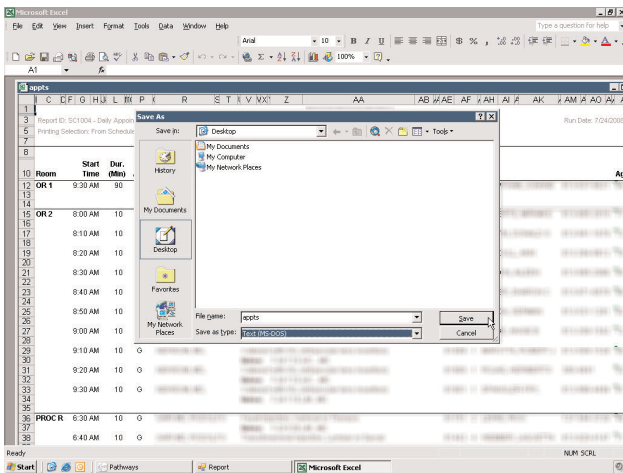
2. Enter an appointment date range **that reflects the date you wish to confirm appointments** for in the **From Schedule Date** and **To Schedule Date** fields. For instance, if you want to confirm tomorrow's appointments, then enter tomorrow's date in both the **From Schedule Date** and **To Schedule Date** boxes. Next, click the **Room** drop-down box and select a Room you wish to contact. Then, click **Add Value**. Repeat for each additional Room. For **Report Format** (located at the bottom of the screen), select **Excel**. Now, click **Save File**.



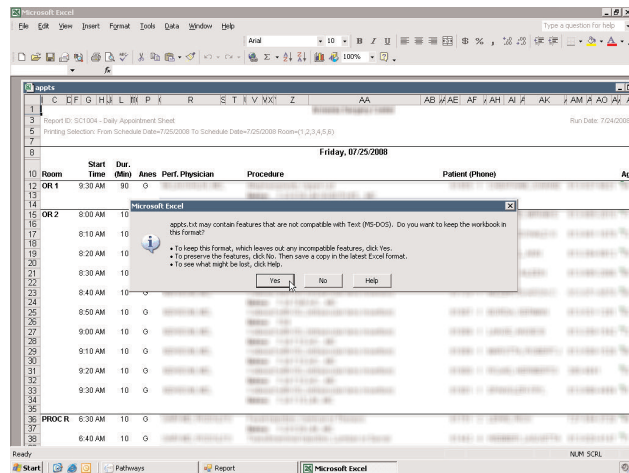
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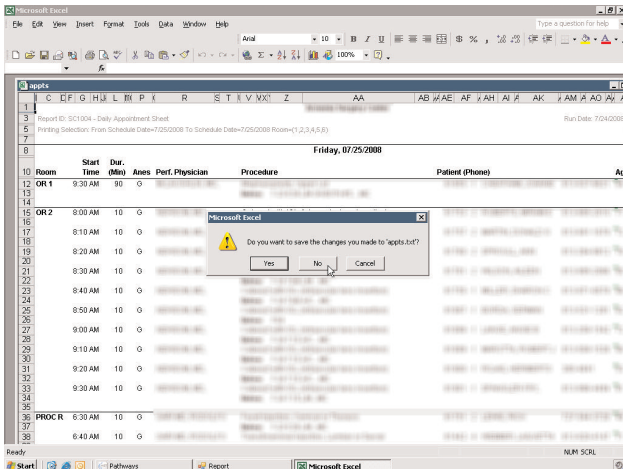
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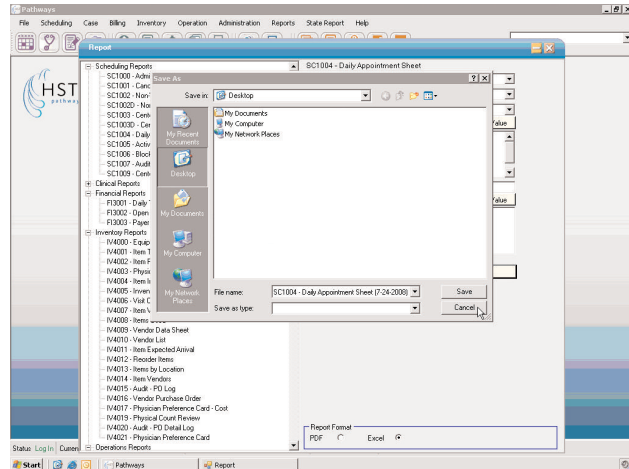
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