



# Getting Data From Your Practice Management System

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## 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.

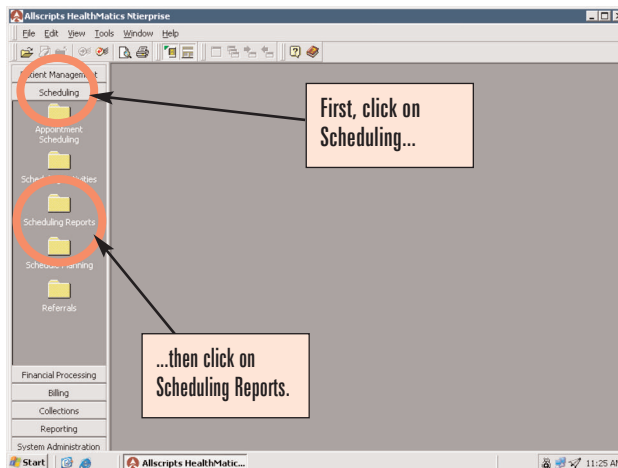
## Step 2: Daily Operation - Daily Report

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.

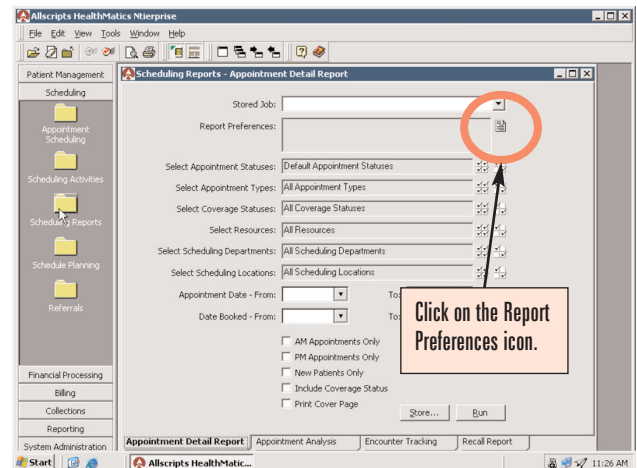
# Getting Data From Your Practice Management System

## Healthmatics Ntierprise: Appointments - 3 Month Report

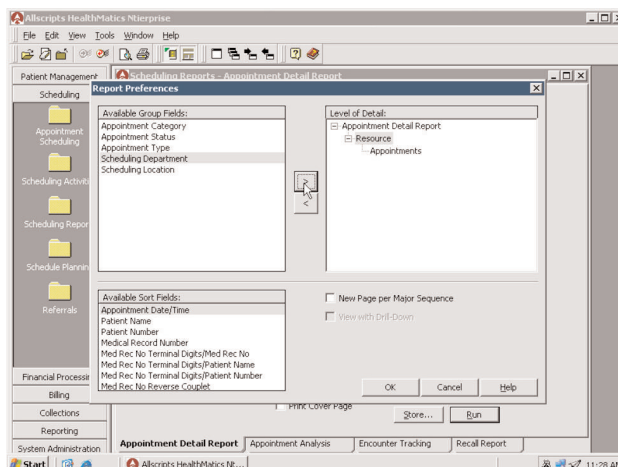
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will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



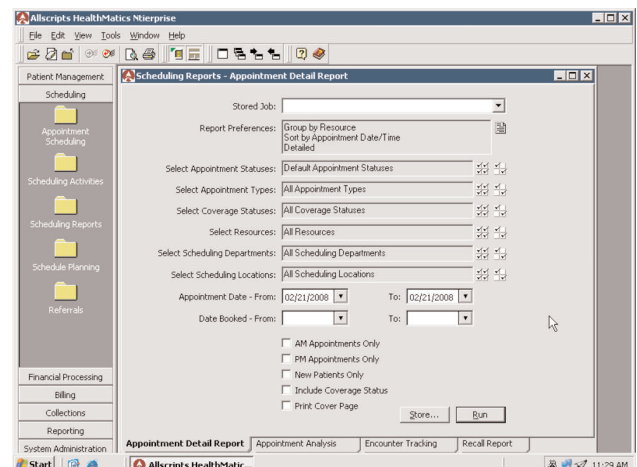
1. Open Healthmatics Ntierprise to the main screen. Using the tool bar on the left, choose **Scheduling** and then **Scheduling Reports**.



2. After the Scheduling Reports window opens, click on the icon for **Report Preferences**.

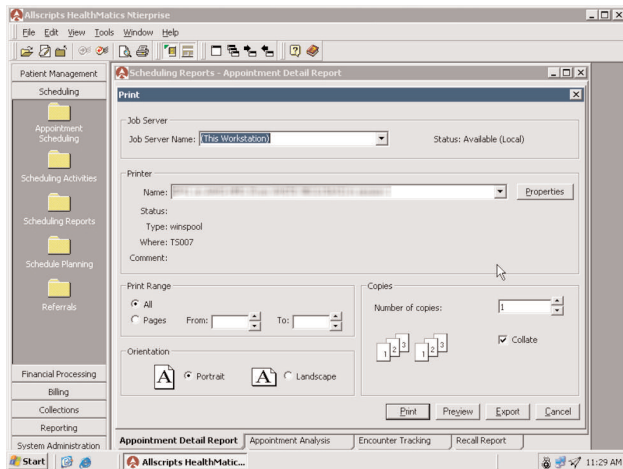


3. The Report Preferences window will open. Under **Available Group Fields**, choose **Resource** and click the **>** button, then click **OK**.

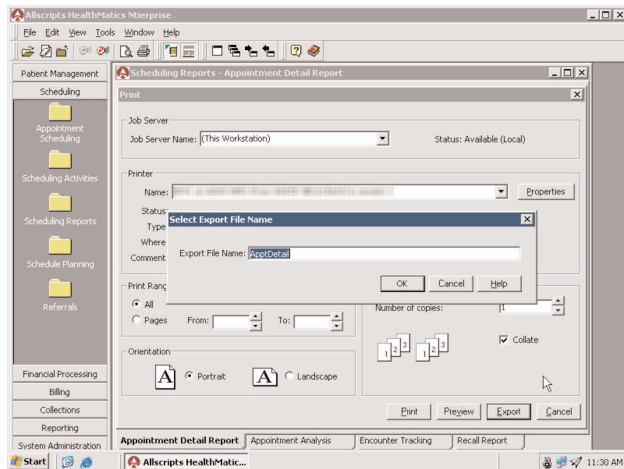


4. Enter a **3 month** date range in the **Appointment Date - From:** and **To:** boxes. For instance, if today was 4/17/06, enter 4/17/06 in the **From** box and 7/17/06 in the **To** box. Then click on the **Run** button.

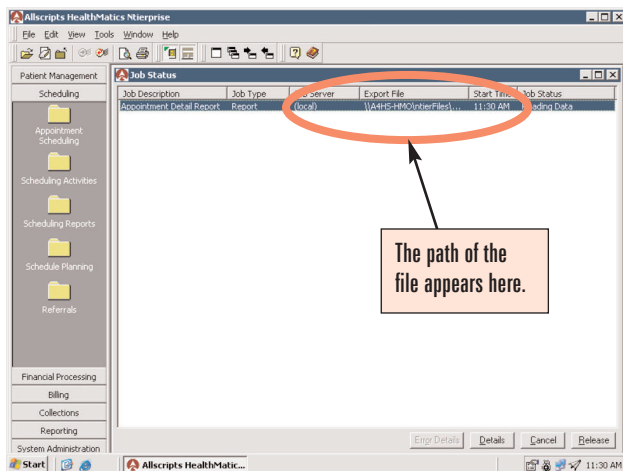
## Getting Data From Your Practice Management System, continued



5. The Print window will now appear. You do not have to change any settings here, just simply click **Export**.



6. Leave the file named **ApptDetail** as set by default by the software, then click **OK**.

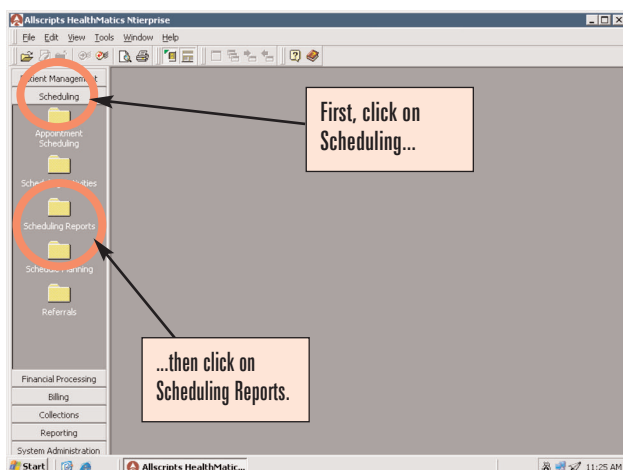


7. The Job Status screen confirms the file has been created and lists the path to where the file is stored under **Export File**. Please write this path down for future reference. That's it, you're done!

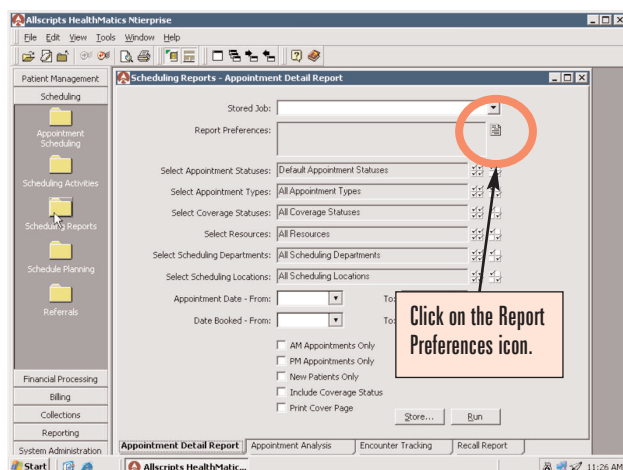
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## Healthmatics Ntierprise: Appointments - Daily Report

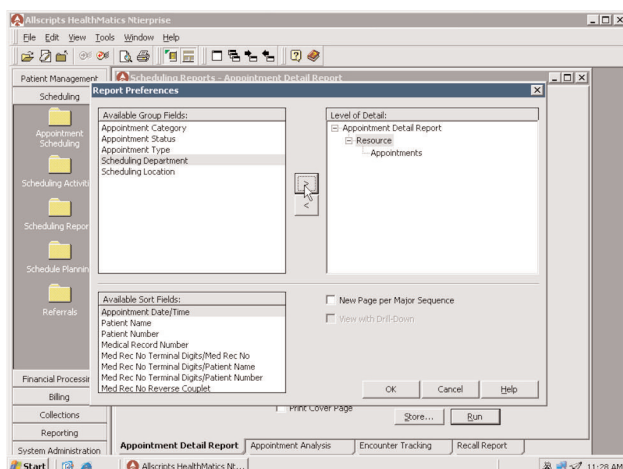
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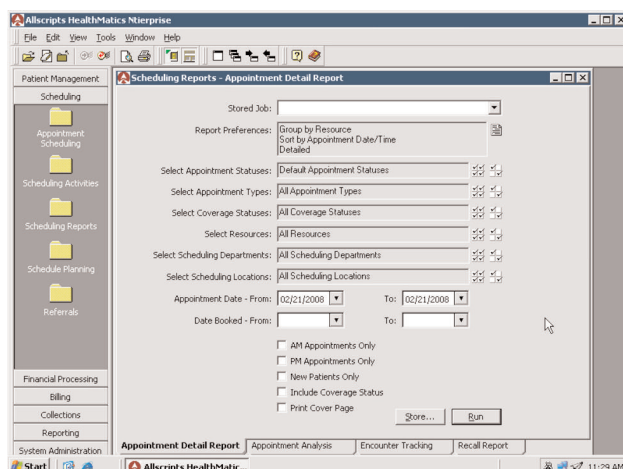
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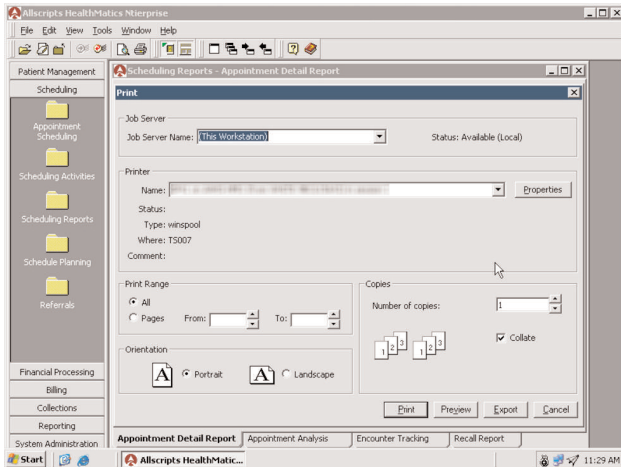


3. The Report Preferences window will open. Under **Available Group Fields**, choose **Resource** and click the > button, then click **OK**.

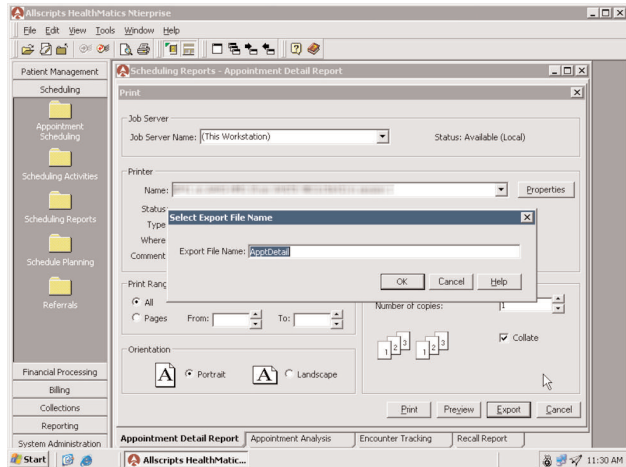


4. Enter an appointment date range that reflects the date for which you wish to confirm appointments for in the **From Date** and **To Date** fields. For instance, if you want to confirm tomorrow's appointments, then enter tomorrow's date in both the **From** and **To** boxes. Then click on the **Run** button.

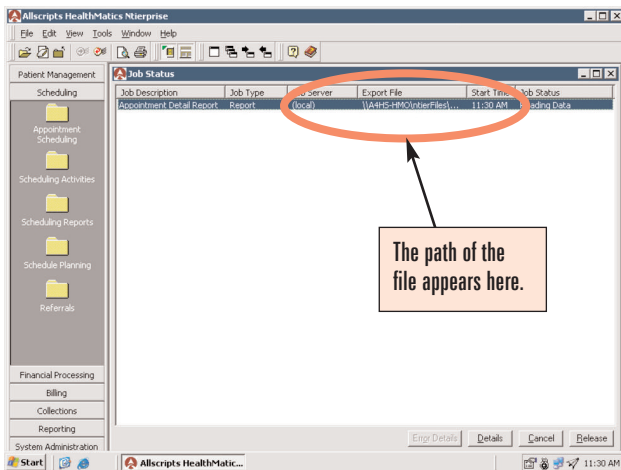
## Getting Data From Your Practice Management System, continued



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