Site # _____

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.

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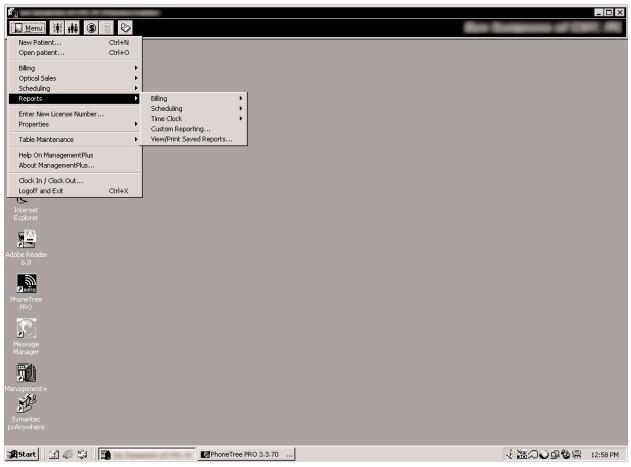
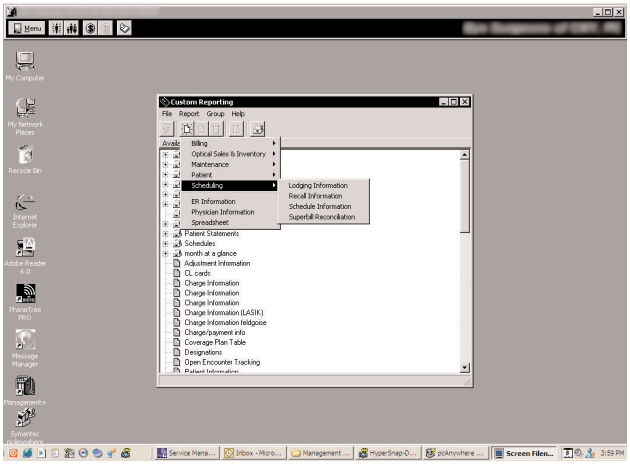
Getting Data From Your Practice Management System

Management Plus: Appointments - 3 Month Report

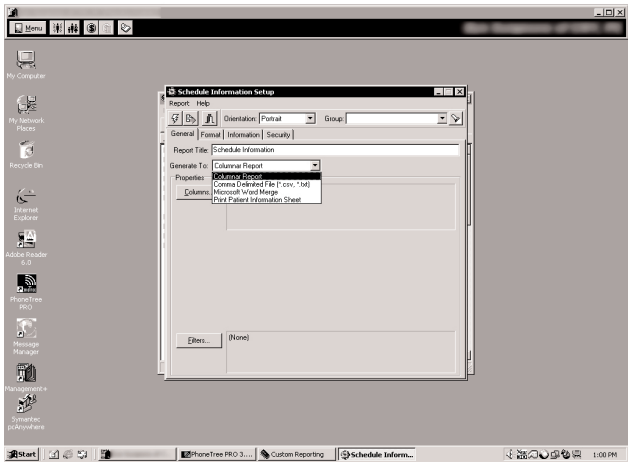
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will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



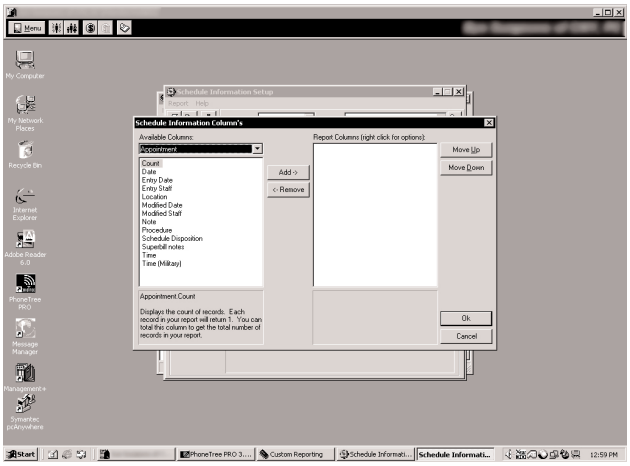
1. Open Management Plus to the main screen. From the **Menu** button, choose **Reports,** then **Custom Reporting.**



2. The **Custom Reporting** window opens. Click on **Report**, then **Scheduling**, then **Schedule Information**.



3. In the next window, click the drop-down box for **Generate To** and choose **Comma Delimited File (*csv, *txt)**.** Then, click **Columns**.



4. A new window opens. Click on the **Available Columns:** drop down box and choose **Phonetree Office Schedule**. Next, choose the following fields and click the **Add** button to move them to the **Report Columns** box: **Time**, **Full Name**, **Age**, **HIPAA (Phone)**, **Home Phone**, **Work Phone**, **Procedure**, **Note**, **Superbill Notes** and **Date**. Then, click **Ok**.

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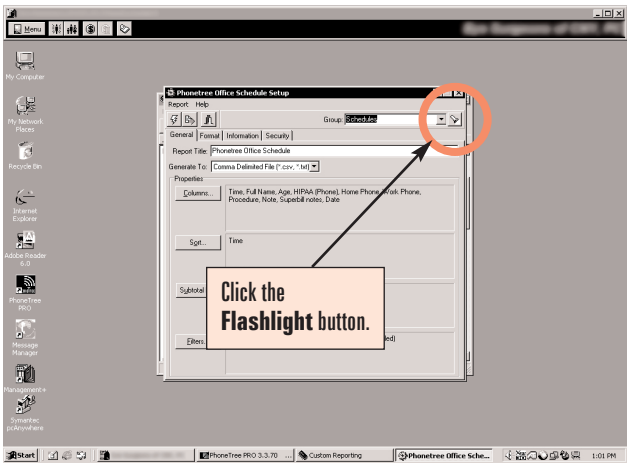
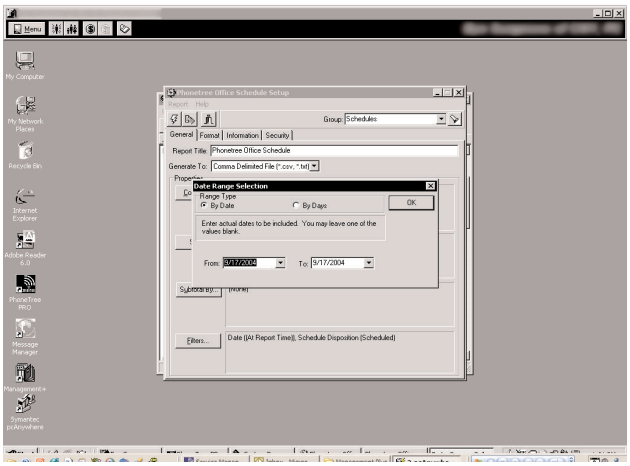
Getting Data From Your Practice Management System, continued



5. Next, click on the Flashlight button.



6. The **Date Range Selection** window opens. Set **Range Type** to **By Date** and enter a 3 month date range in the **From** and **To** boxes. For instance, if today was 4/19/06, then enter 4/19/06 in the **From** box and 7/19/06 in the **To** box. Then, click **OK**. That's it, you're done!

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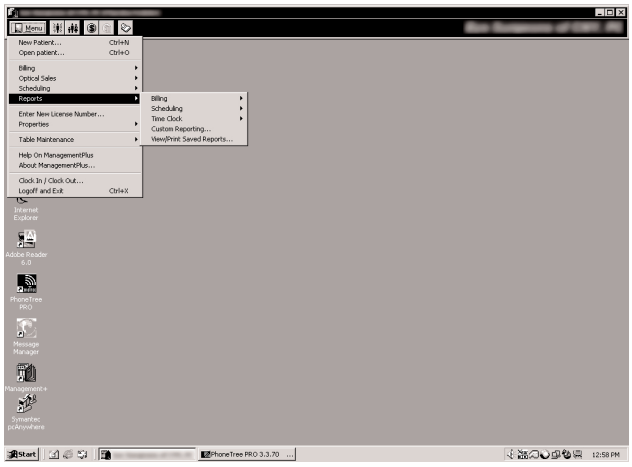
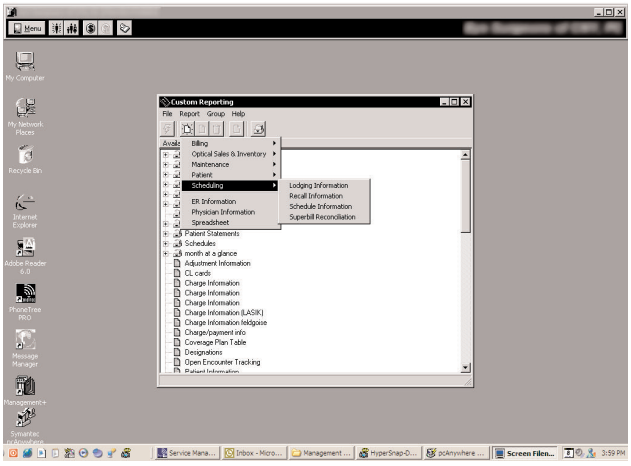
Getting Data From Your Practice Management System

Management Plus: Appointments - Daily Report

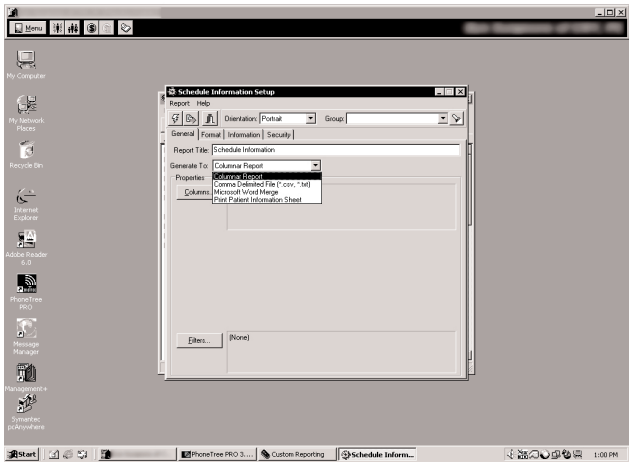
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will configure PhoneTree to read from this file. Once configured, each day PhoneTree will read this file and use it to make calls. Here's how to do this using the Management Plus system:



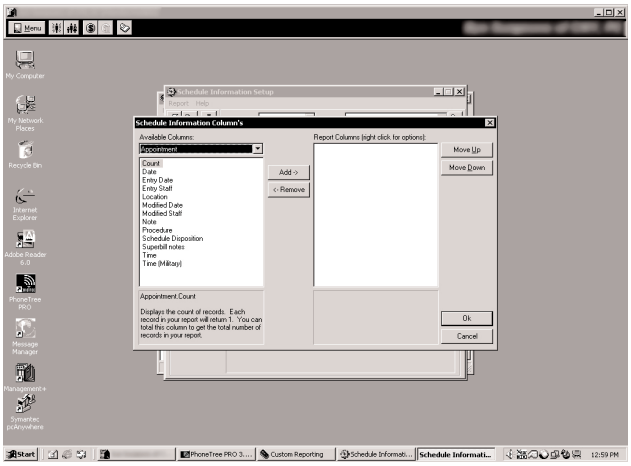
1. Open Management Plus to the main screen. From the **Menu** button, choose **Reports,** then **Custom Reporting.**



2. The **Custom Reporting** window opens. Click on **Report**, then **Scheduling**, then **Schedule Information.**



3. In the next window, click the drop-down box for **Generate To** and choose **Comma Delimited File (*csv, *txt).** Then, click **Columns**.



4. A new window opens. Click on the **Available Columns:** drop down box and choose **Phonetree Office Schedule.** Next, choose the following fields and click the **Add** button to move them to the **Report Columns** box: **Time**, **Full Name**, **Age**, **HIPAA (Phone)**, **Home Phone**, **Work Phone**, **Procedure**, **Note**, **Superbill Notes** and **Date.** Then, click **Ok**.

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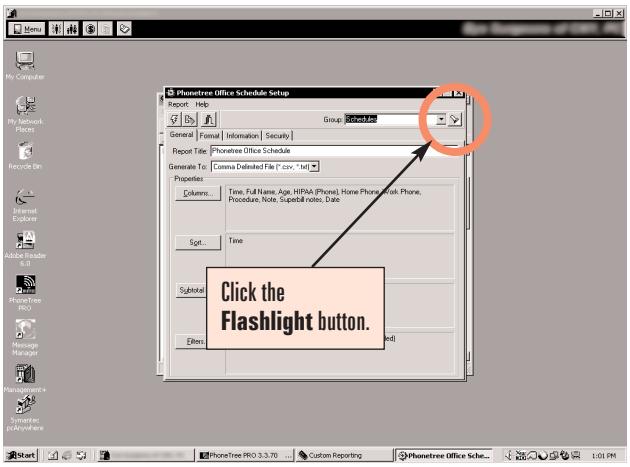

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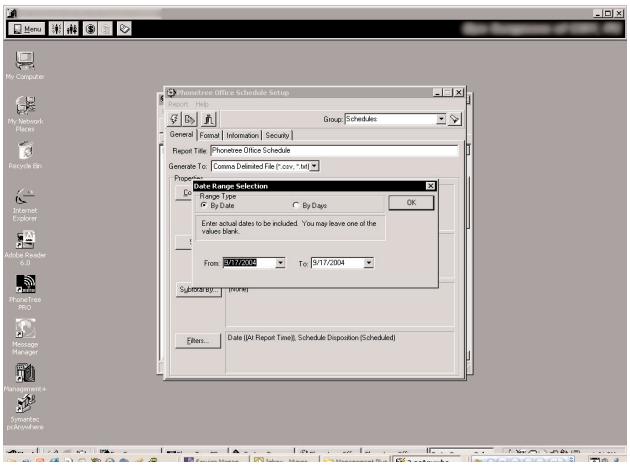

6. The **Date Range Selection** window opens. Set **Range Type** to **By Date** and enter a date range that reflects the date for which you wish to confirm appointments in the **From** and **To** boxes. For instance,if you want to confirm tomorrow's appointments, then enter tomorrow's date in the **From** and **To** boxes. Then, click **OK**. That's it, you're done!

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