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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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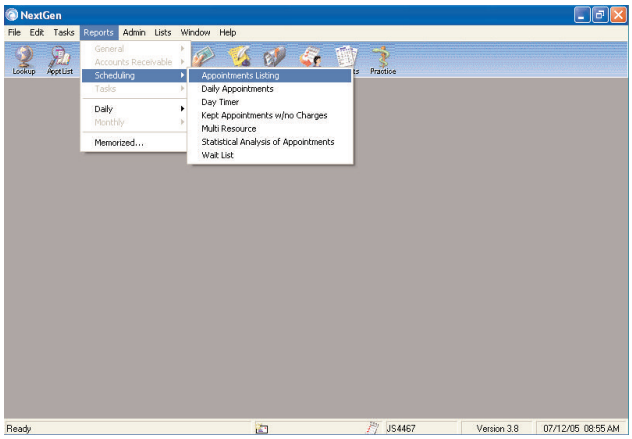
Getting Data From Your Practice Management System

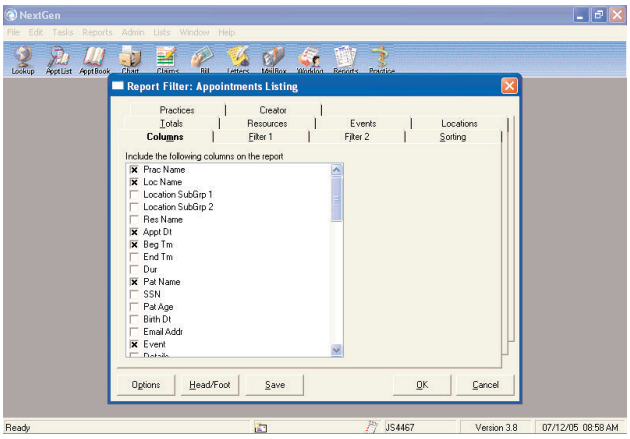
NextGen (Ver. 3): Appointments (Template for 3 Month and Daily Report)

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 NextGen system:

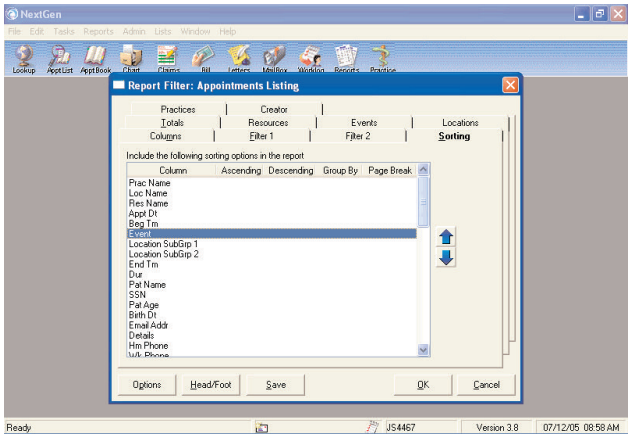
Note: The first five steps show how to create a template file for use with the 3 Month and Daily Report. Once a template file is created, you will only need to follow the last five steps each day to save your appointment report for PhoneTree.



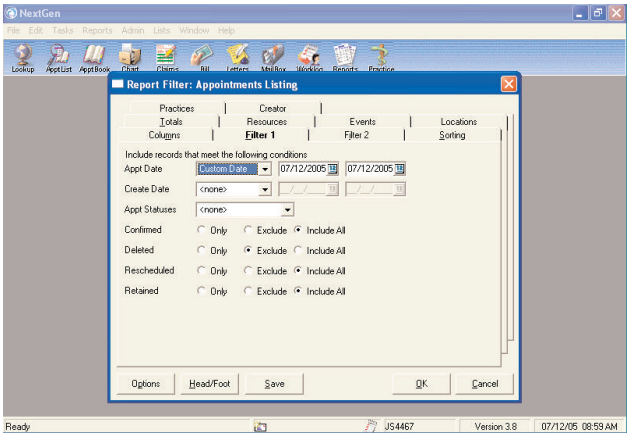
A. Open NextGen to the main screen. From the **Reports** menu, choose **Scheduling -> Appointments Listing.**



B. A new window opens called **Report Filter**. Click on the **Columns** tab, then select ONLY the following columns depending on which PhoneTree product you have. For a **Pro** system: **Prac Name**, **Loc Name**, **Appt Dt**, **Beg Tm**, **Pat Name**, **Event**, **Hm Phone**, **Day Phone** and **Rendering**. For a **Patient Messaging** system: **Loc Name, Appt Dt, Beg Tm, Pat Name, Event, Hm Phone, Day Phone and Rendering.**



C. Now click on the **Sorting** tab and make sure there are no green check marks beside ANY field. If there are check marks, click on them to make them disappear. **This step is extremely important, because failure to remove the check marks will cause the file format to be invalid!**



D. Next, click on the **Filter 1** tab and set **Custom Date** for the date query next to **Appt Date**.

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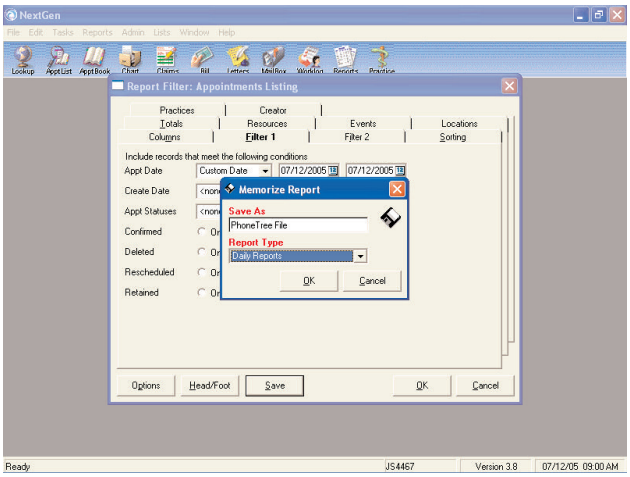
Getting Data From Your Practice Management System, continued



E. Now that we have made all the appropriate selections, we can save the report template. At the bottom of the window, click the **Save** button, name the file "**PhoneTree File**" and choose **Daily Reports** for the **Report Type**, then click **OK**.

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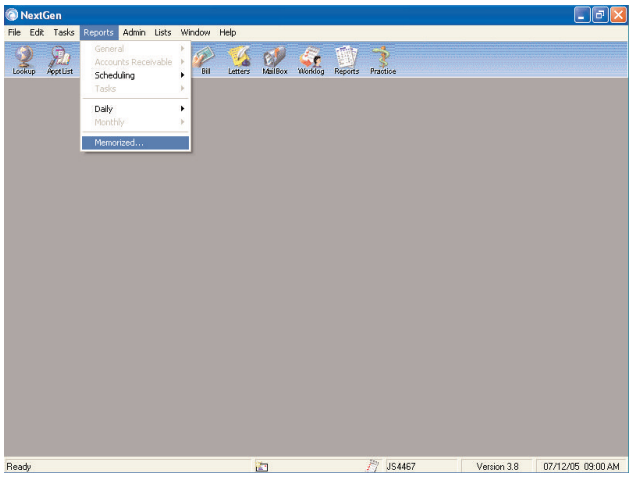
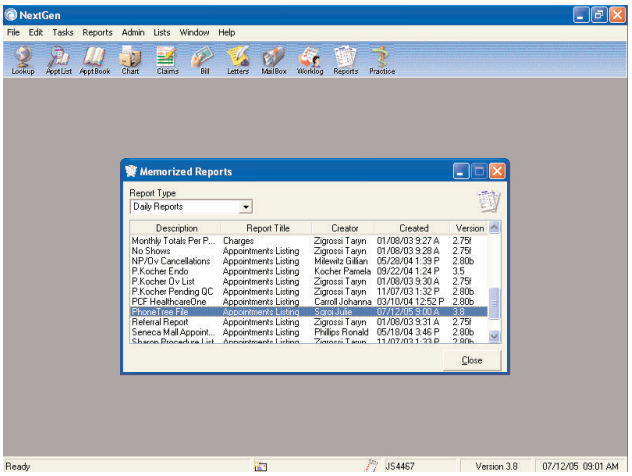
Getting Data From Your Practice Management System

Creating the 3 Month Report

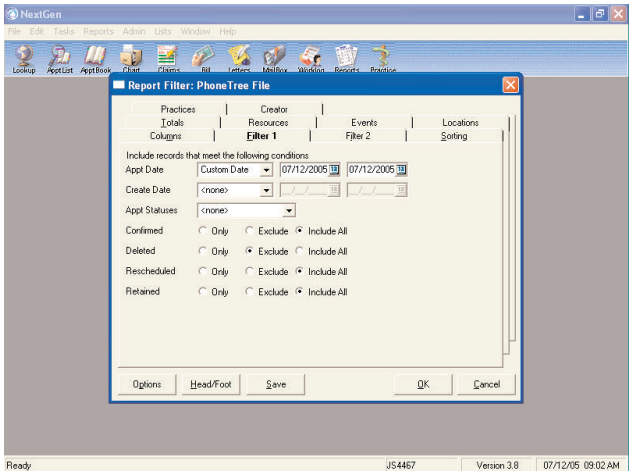


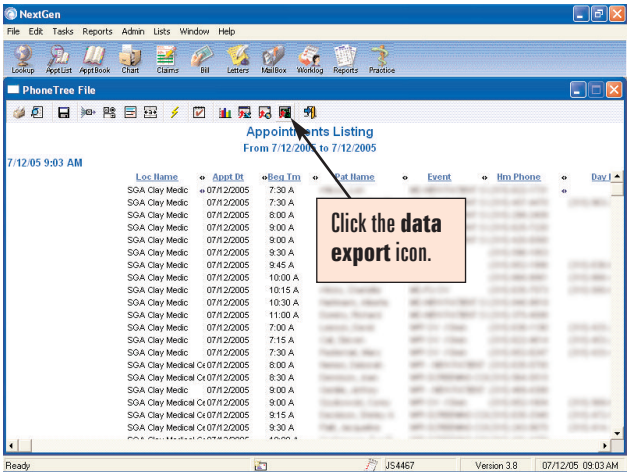


The following steps are for creating the 3 Month Report, now that the template has been created:

1. From the main screen, choose **Memorized...** from the **Reports** menu.

2. Choose **Daily Reports** from the **Report Type** drop-down menu. Locate the template labeled **PhoneTree File** and double-click on it.





3. Click on the **Filter 1** tab, then select a date range, to the right of **Appt Date**, that encompasses the next 3 months. For instance, if today was 4/5/06, then select 4/5/06 in the first box and select 7/5/06 in the second box. Now click the **OK** button.

4. Next you will see a preview of the data you requested. Now click the data export icon (next to last).

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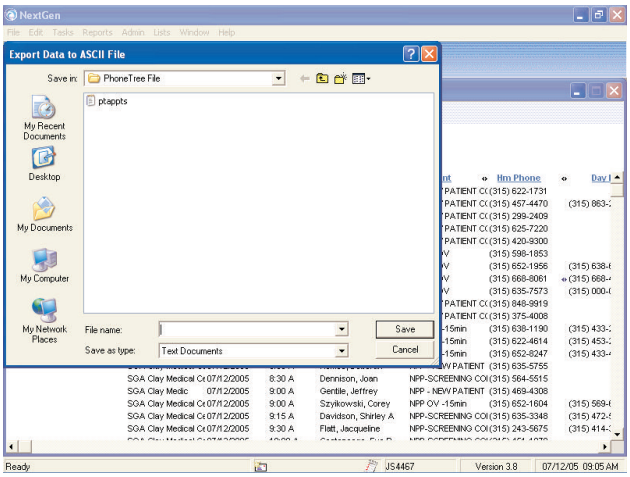

5. You will now be asked where you want to save this file. Direct it to a directory such as C:/PhoneTreeDataFile and name it **PTAppts**, then click the **Save** button. This step creates the file and you will now be able to locate it where you chose to save it. Congratulations–you're done!

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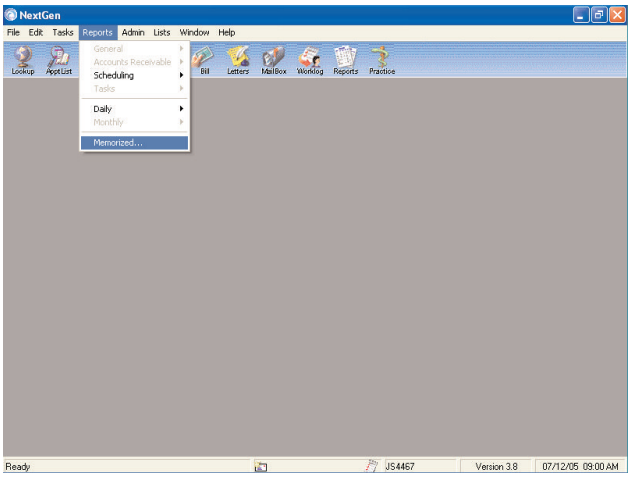
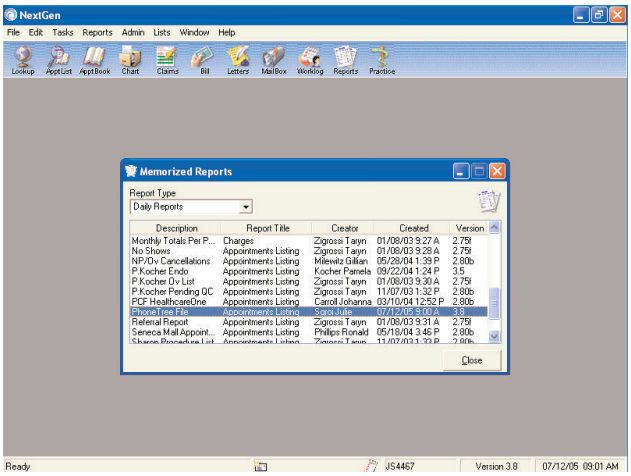
Getting Data From Your Practice Management System

Creating the Daily Report

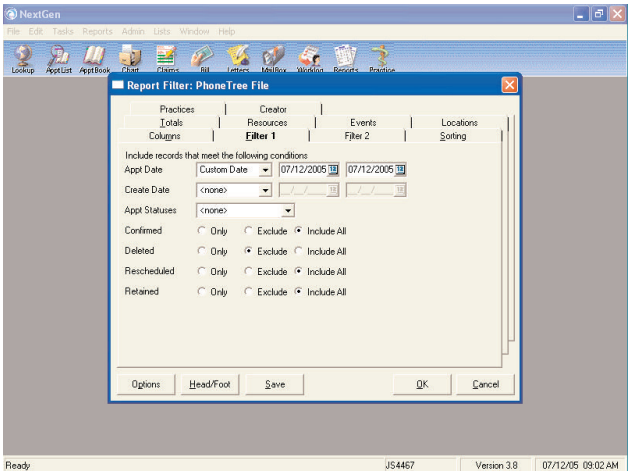


The following steps are for creating the Daily Report, now that the template has been created:

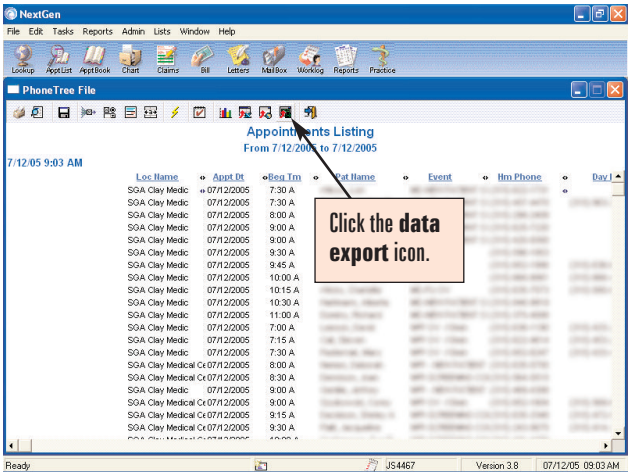
1. From the main screen, choose **Memorized...** from the **Reports** menu.



2. Choose **Daily Reports** from the **Report Type** drop-down menu. Locate the template labeled **PhoneTree File** and double-click on it.



3. Click on the **Filter 1** tab, then in the boxes to the right of **Appt Date**, choose a date range that reflects the date for which you wish to confirm appointments. For instance, if you want to confirm tomorrow's appointments, choose tomorrow's date in both boxes. Now click the **OK** button.



4. Next you will see a preview of the data you requested. Now click the data export icon (next to last).

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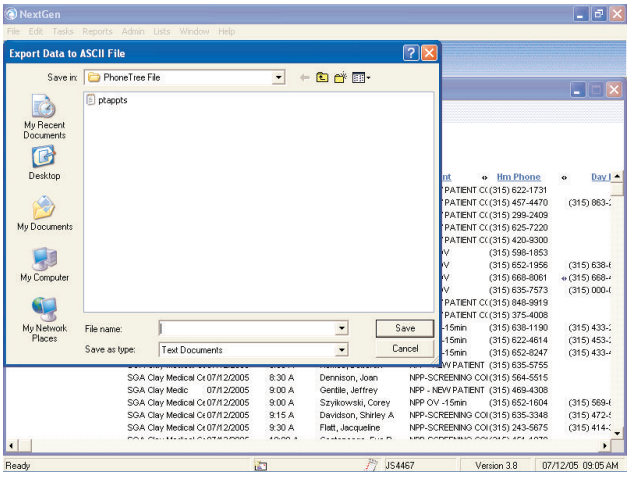

5. You will now be asked where you want to save this file. Direct it to a directory such as C:/PhoneTreeDataFile and name it **PTAppts**, then click the **Save** button. This step creates the file and you will now be able to locate it where you chose to save it. Congratulations–you're done!

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