



# 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.

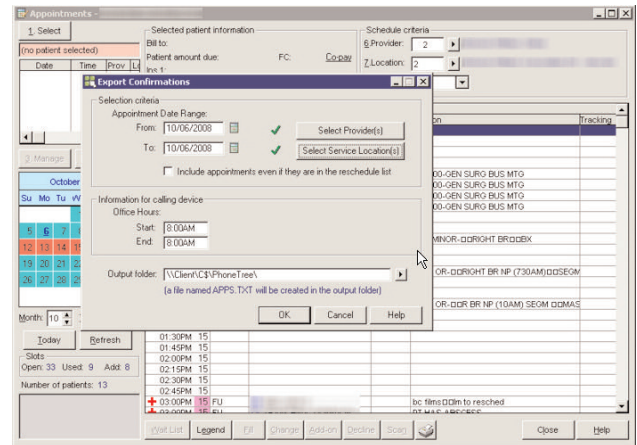
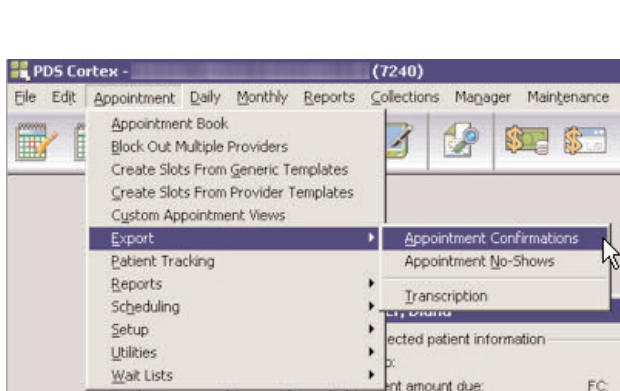
## Step 2: Daily Operation - Daily Report

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.

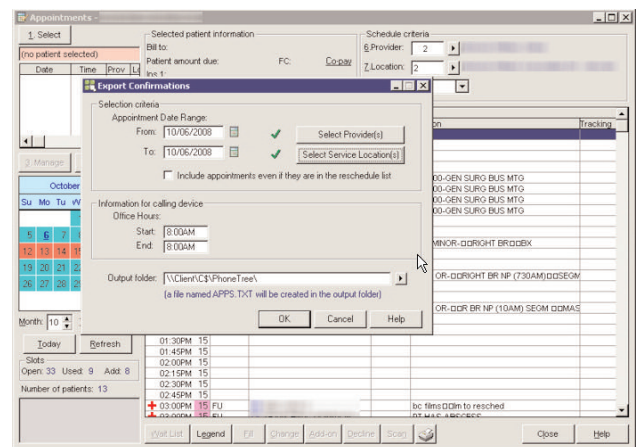
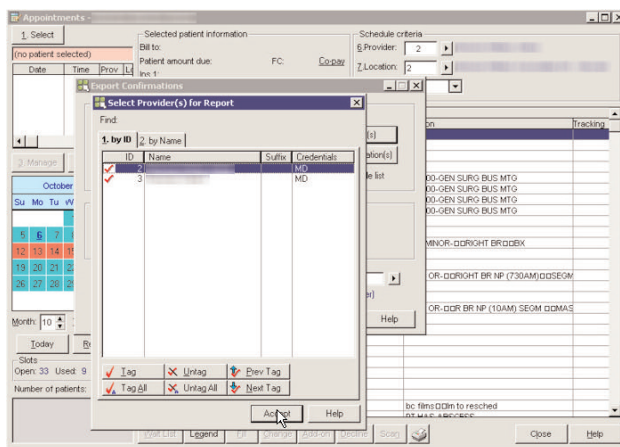
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## PDS Cortex: Appointments - 3 Month Report

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 PDS Cortex system:

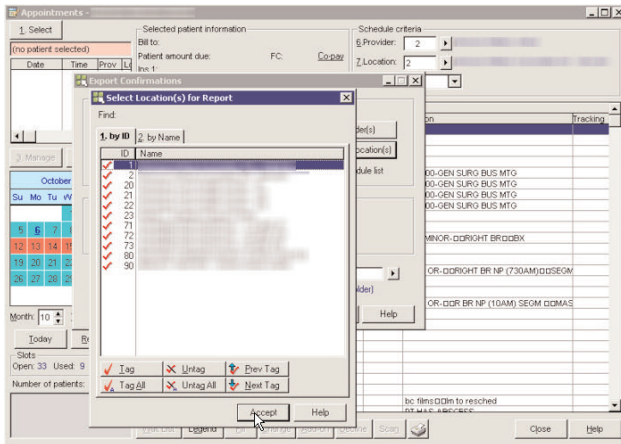


1. Open PDS Cortex to the main screen. From the **Appointment** menu, choose **Export > Appointment Confirmations**.
2. A new window opens called **Export Confirmations**. Enter a **3 month** appointment date range in the **From** and **To** fields. For instance, if today was 10/6/08, enter 10/6/08 in the **From** box and 1/6/09 in the **To** box. Under **Office Hours**, set **Start** and **End** as **8:00AM**. For **Output folder**, click the arrow button and set the path of where the file should be created. Next, click **Select Providers** to choose which providers to export.

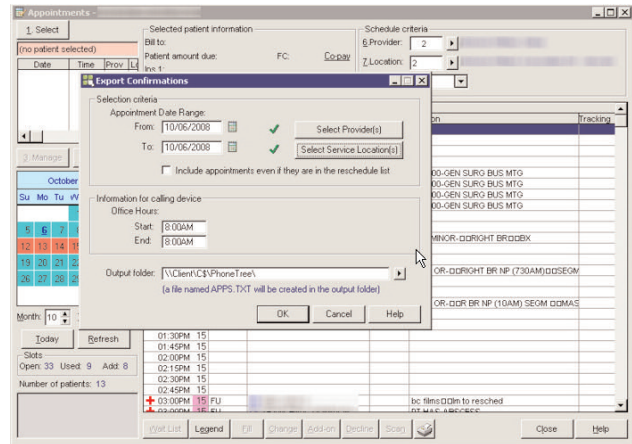


3. Select which providers you want to export on your file by highlighting their name and then clicking **Tag**. To deselect a provider, highlight that provider and then click **Untag**. When finished, click **Accept**.
4. Next, click **Select Service Locations** to choose which locations you want to export.

## Getting Data From Your Practice Management System, continued



5. Select which locations you want to export on your file by highlighting their name and then clicking **Tag**. To deselect a provider, highlight that provider and then click **Untag**. When finished, click **Accept**.

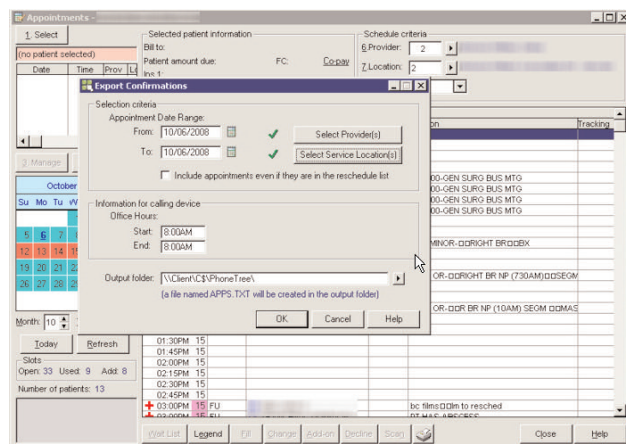
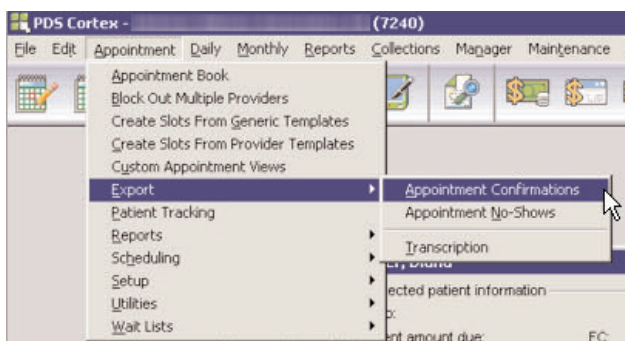


6. To export your file, click **OK**. As shown below the path you chose on step 2, the file will be named APPS.TXT and saved in the output folder. Congratulations – you're done!

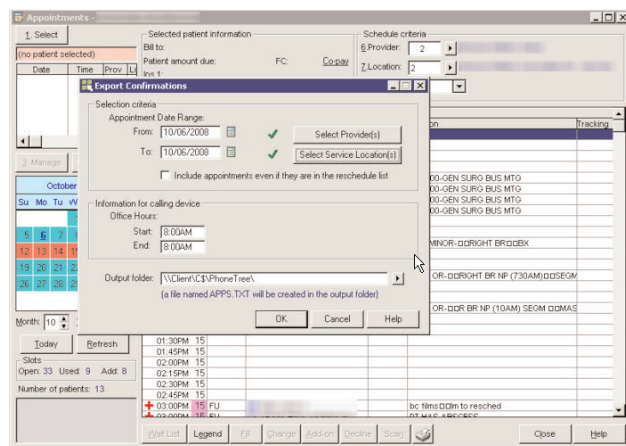
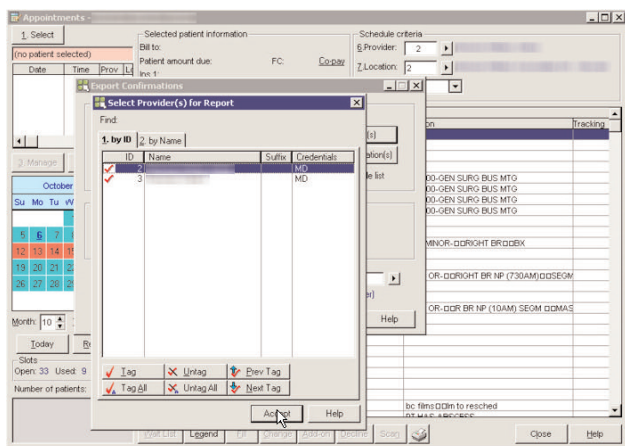
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## PDS Cortex: Appointments - Daily Report

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 PDS Cortex system:

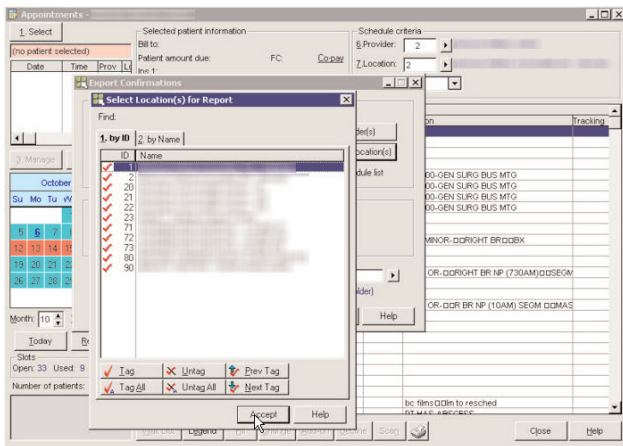


1. Open PDS Cortex to the main screen. From the **Appointment** menu, choose **Export > Appointment Confirmations**.
2. A new window opens called **Export Confirmations**. Enter an appointment date range **that reflects the date you wish to confirm appointments for** in the **From** and **To** fields. For instance, if you want to confirm tomorrow's appointments, then enter tomorrow's date in both the **From** and **To** boxes. Under **Office Hours**, set **Start** and **End** as **8:00AM**. For **Output folder**, click the arrow button and set the path of where the file should be created. Next, click **Select Providers** to choose which providers to export.

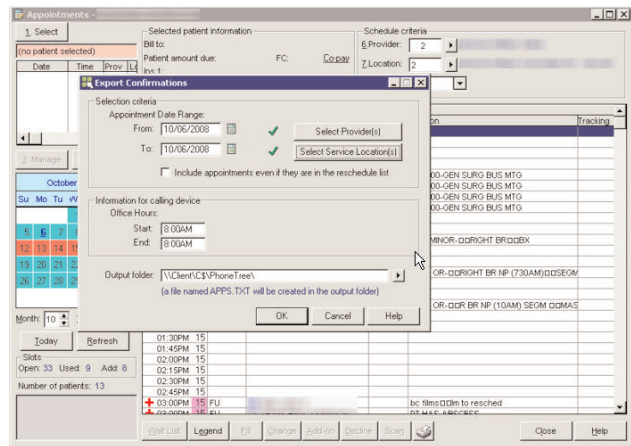


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