



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.

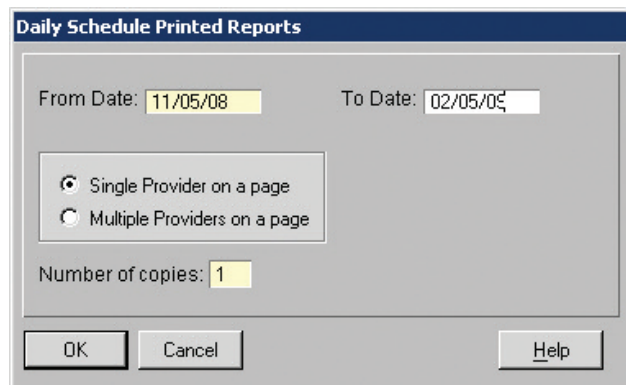
Step 2: Daily Operation - Daily Report

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.

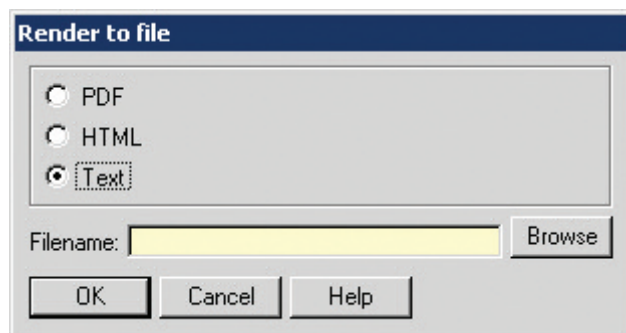
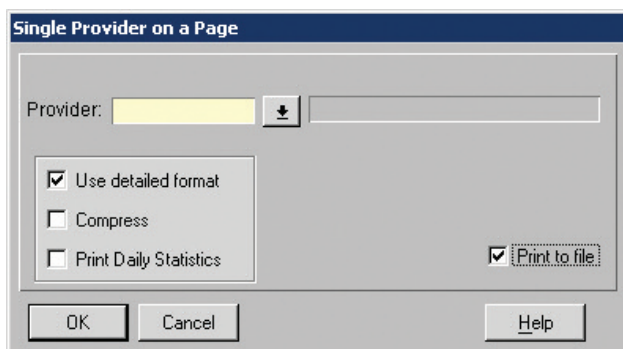
Getting Data From Your Practice Management System

Practice Partners: 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 Practice Partners system:

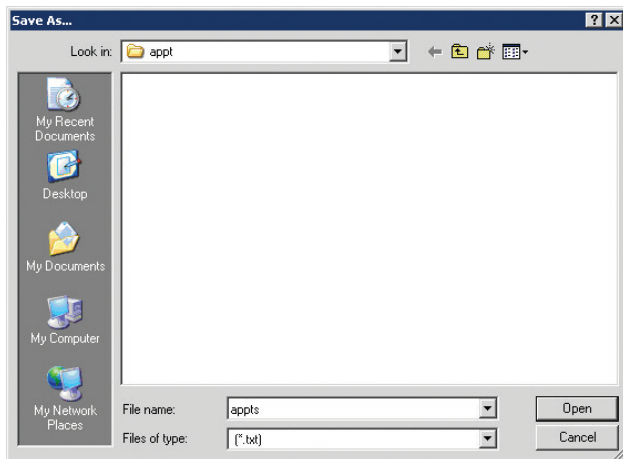


1. Open Practice Partners to the main screen. From the **Reports** menu, choose **Schedule Reports** ► **Daily Schedule**.
2. Enter a **3 month** appointment date range in the **From Date** and **To Date** fields. For instance, if today was 11/6/08, enter 11/6/08 in the **From Date** box and 2/6/09 in the **To Date** box. Leave the default setting **Single Provider on a page** selected and click **OK**.

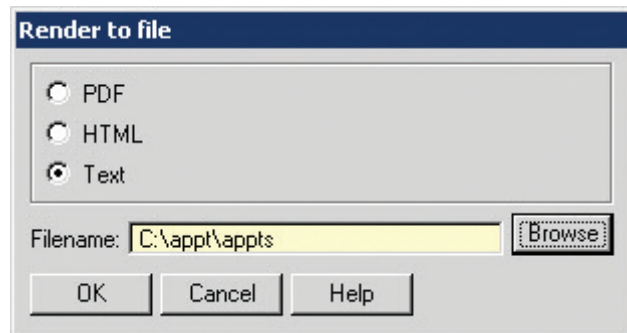


3. Leave the **Provider** field blank. Enable **Use detailed format** and **Print to file**. Then, click **OK**.
4. From the list of file formats, select **Text**. Then, click **Browse**.

Getting Data From Your Practice Management System, continued



5. You will now be asked where you want to save this file. Choose a location such as "C:/PhoneTree Data File" for the **Look in** location and **appts** for the **File name**. When finished, click **Open**.

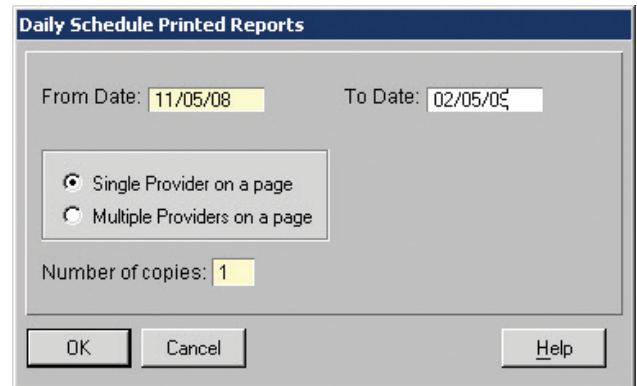


6. The path you just entered on the previous step will appear in the **Filename** field. Click **OK** to create and save the file to this location. Congratulations – you're done!

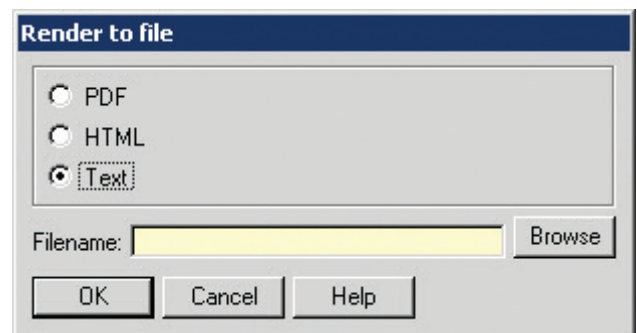
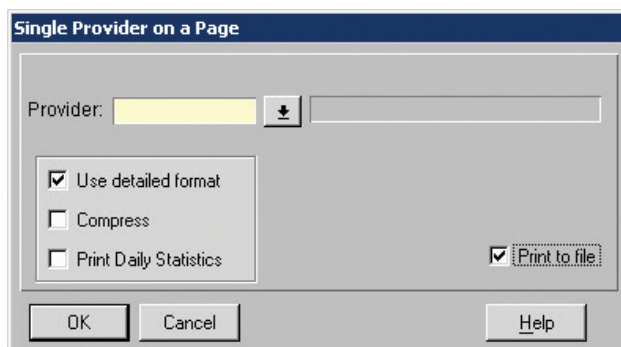
Getting Data From Your Practice Management System

Practice Partners: 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 Practice Partners system:

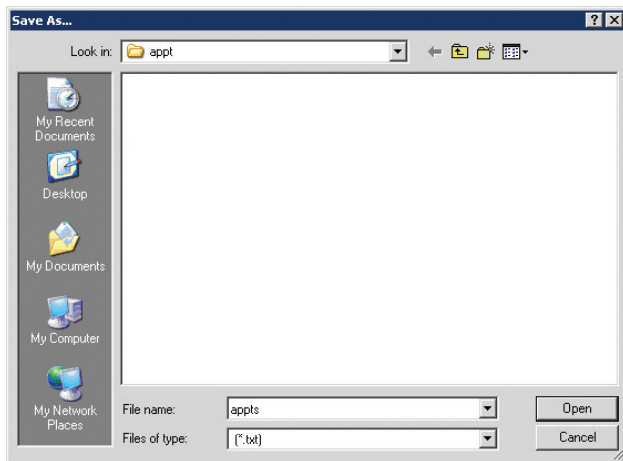


1. Open Practice Partners to the main screen. From the **Reports** menu, choose **Schedule Reports** ► **Daily Schedule**.
2. Enter an appointment date range **that reflects the date you wish to confirm appointments** for in the **From Date** and **To Date** fields. For instance, if you want to confirm tomorrow's appointments, then enter tomorrow's date in both the **From** and **To** boxes. Leave the default setting **Single Provider on a page** selected and click **OK**.

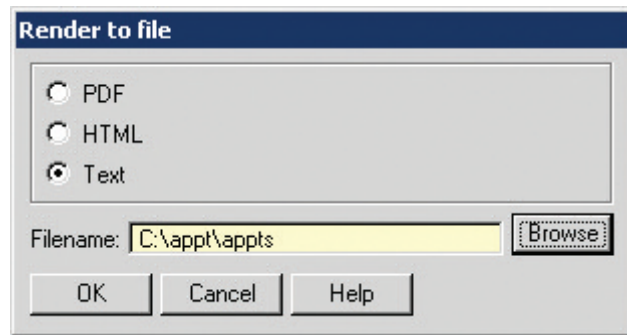


3. Leave the **Provider** field blank. Enable **Use detailed format** and **Print to file**. Then, click **OK**.
4. From the list of file formats, select **Text**. Then, click **Browse**.

Getting Data From Your Practice Management System, continued



5. You will now be asked where you want to save this file. Choose a location such as "C:/PhoneTree Data File" for the **Look in** location and **appts** for the **File name**. When finished, click **Open**.



6. The path you just entered on the previous step will appear in the **Filename** field. Click **OK** to create and save the file to this location. Congratulations – you're done!