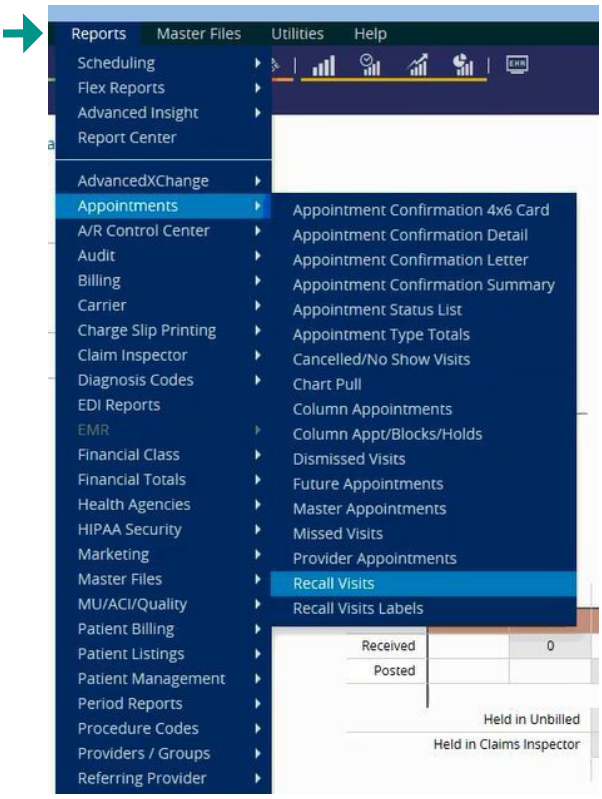
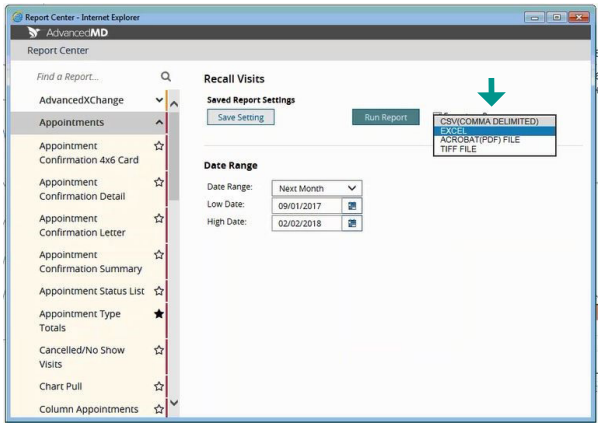
Getting Data From Your Practice Management System

AdvancedMD Recalls

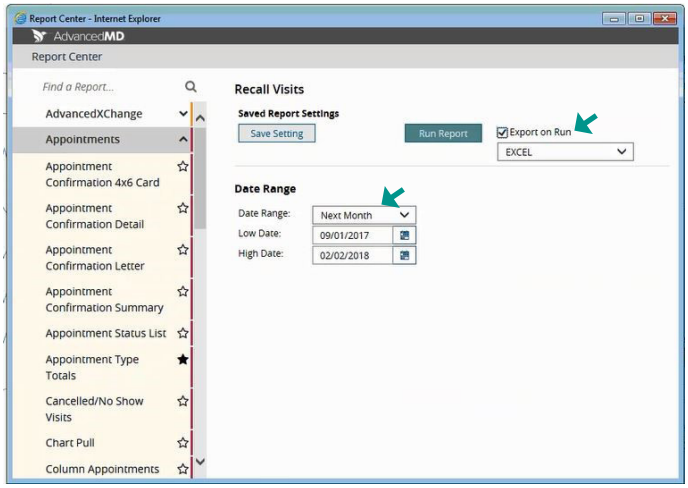
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your recalls report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. A PhoneTree Customer Support representative will configure your PhoneTree system to read from this file. Once configured, this file will need to be created whenever you want to notify recall patients so that your PhoneTree system will read this file and use it to send messages. Here's how to do this using the AdvancedMD system:



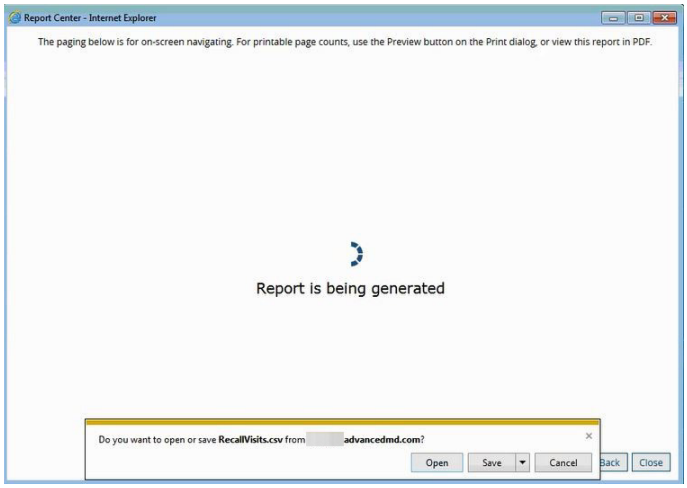
1. Click the **Reports** menu from the top of the screen, and then select **Appointments > Recall Visits.**



3. Next, select **CSV(COMMA DELIMITED)** from the Export on Run combo box, and then click **Run Report.**



2. When the Recalls Visits page appears, click the **Date Range** combo box to select the desired timeframe of Recalls to notify. Then, enable **Export on Run.**



4. The screen will update to show the report is being generated. Once the report is ready, you will be prompted to open or save the file. Choose to save the file, name it "recalls.csv", and save it in the "C:\PhoneTreeDataFiles" folder.