



RACK MOUNT INSTALLATION **GUIDE**



Health**Wave**™ (Desktop)

Thank you for purchasing the **PhoneTree® HealthWave™** rack mount system. Before beginning installation, verify the following items were included in your shipment:

Software



Installation CD



Female Voice CD



Male Voice CD

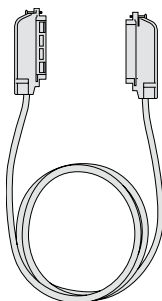


User Guide CD

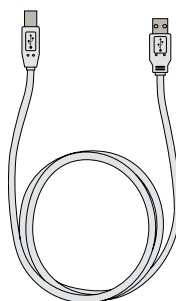
Hardware



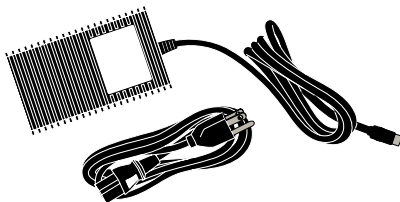
Headset Microphone



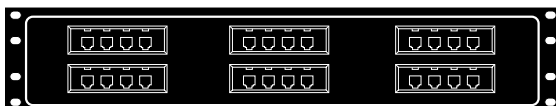
25-pair/50-pin Telco Cable



USB Cable



Power Transformer and 3-prong Power Cord



24-port RJ11 Patch Panel
(only sold with compatible systems)

If you are missing any of the above items, please contact PhoneTree Customer Support at **800.555.0559** or hcsupport@phonetree.com.

8/16/24-Port PhoneTree Rack Mount Hardware Specifications



Dimensions: 17.5"W x 1.678"H x 14.18"D

The **LINE** lights illuminate only while the PhoneTree hardware is making calls and briefly turn off while switching between calls.

The green **PWR** light illuminates while the PhoneTree hardware has power, regardless of whether calls are being made.

The **MIC** and **SPKR** jacks are for use with the headset microphone (see Step 2).

System Requirements (Minimum)

- 2.0GHz or faster processor
- Windows® XP, Windows® Server 2003, Windows® Server 2008, Windows Vista® (32-bit or 64-bit) or Windows® 7 (32-bit or 64-bit)
- 4GB of RAM
- 5GB of hard-disk space
- CD-ROM Drive
- 1024x768 or higher resolution monitor
- High-Speed USB 2.0 port (1 port per PhoneTree rack unit)*
- Analog port for each PhoneTree line
- High-speed Internet access (for remote installation and connecting to PhoneTree's servers**)

*A maximum of 24 lines per host controller card. If all of your USB ports are in use, you may need to purchase a true dual (or quad) host controller card to provide additional ports.

**HealthWave uses secure 128-bit SSL encryption when sending and receiving data from our servers.

Please Note: HealthWave is designed to allow operation in the background however, we cannot guarantee compatibility or problem-free operation with other programs.

This guide will assist you with installing the PhoneTree HealthWave system on your computer. Once you have completed steps 1-4, please contact PhoneTree Customer Support to schedule the remaining configurations for your system.

Install the Software

Note: Before installing the HealthWave software, ensure the intended Windows® operating system user is a part of the Local Administrative Group and for computers running Windows Vista® or Windows® 7, refer to the installation document included inside the PhoneTree package.

- a. Locate the **Serial Key** label inside the software case (required to install the software).

PhoneTree Messaging Systems

Serial Key: XXXX-XXXX-XXXX-XXXX

Base Promo

You are entitled to: 100 Free Calls!

Promo Code: XXX-X-XXXX-XXXXXX-XXXX-XXXX

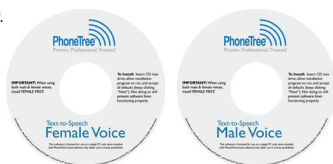
Valid through: 6/24/20xx



- b. Insert the **HealthWave Installation CD** into your CD/DVD drive. The installer screen should start automatically (if it does not, double-click on the CD/DVD drive ► **PhoneTreeMVPu** ► **Setup**). Follow the on screen instructions to complete installation. When prompted, enter the **Serial Key** and click **Next** to continue the installation process. Once the installation completes, click **Finish**. If requested, restart your computer – do not start the HealthWave software at this time.

- c. Insert the **Female Voice** CD into your CD/DVD drive. The installer screen should start automatically (if it does not, double-click on the CD/DVD drive ► **setup**). Follow the on screen instructions to complete installation. Repeat these steps for the **Male Voice** CD.

Note: When installing both Voice CDs, the Female Voice CD *must* be installed first.



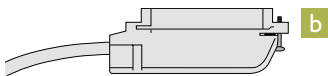
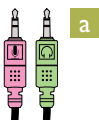
Proceed to Step 2



2

Connect the Hardware

Please Note: The following connections must be made in the order shown.



- Connect the **Headset Microphone's** headphone plug (green) to the **SPKR** jack and microphone plug (pink) to the **MIC** jack.
- Connect the **25-pair/50-pin Telco Cable** to the PhoneTree hardware and tighten the attached screw. Next, connect the other end of the Telco Cable to your phone system or; if purchased, the **24-port RJ11 Patch Panel** and tighten the screw. Next, connect a standard analog phone cable to each port on the Patch Panel. **Note:** For information on how to connect the Telco Cable to a phone system not using the Patch Panel, please contact your phone system manufacturer.
- Connect the **3-prong Power Cord** to the **Power Transformer**. Next, connect the round 5-pin connector to the back of the PhoneTree hardware. Then, connect the 3-prong Power Cord to an available surge protector (recommended) or wall outlet.
- Connect the square end of the **USB Cable** to the PhoneTree hardware and the flat end to an available High-Speed USB 2.0 port on your computer. Microsoft Windows® may prompt you for permission to install the PhoneTree unit's hardware drivers. If prompted, click **Continue Anyway** or **Install this driver software anyway** to proceed. Repeat until the PhoneTree hardware is completely installed.

Proceed to Step 3



3

Now that your PhoneTree HealthWave system is fully installed, it is recommended to test your PhoneTree hardware and phone lines to ensure proper functionality.

Test Your Phone Lines

- a. Double-click the **PhoneTree** shortcut icon, located on your computer's desktop.
- b. Once the software finishes loading, click the **Appointment Options** icon.
- c. Click **Next** until you reach **Dialing Options**. Select **Advanced**, then click **Configure Lines**.
- d. In the **Select line** box, verify the correct number of PhoneTree lines purchased appear without dashes before or after the number. If lines are missing, please contact PhoneTree Customer Support.
- e. Select line **1**, then click **Test Line**.

- f. Put on the Headset Microphone and click **Get dial tone**:

Do you hear a dial tone?

Click **Hang Up**. To make sure a call can be completed on this line, enter your phone number in the **Number to dial** box and click **Dial number**. If this phone line requires a prefix or suffix code to be dialed to access an outside line, enter it with the phone number, separated by a comma (e.g., 9,5553434). Click **Say Hello** once you have answered the call to test playback.

No dial tone?

The phone line is digital or disconnected. Ensure the phone line being used with the PhoneTree hardware is analog and functioning correctly.

Repeat steps **d-f** for each additional line.

Proceed to Step 4



4

Export Your Data

The PhoneTree HealthWave system requires a data file exported from your practice management system with your patients' names and phone numbers.

- a. Download instructions for your practice management software at:
phonetree.com/appointmentfilehelp
- b. Locate your practice management software from the list and save a copy of the instructions to your computer (right-click on the link and click **Save Target As...**). If you don't see your practice management software listed, please contact installs@phonetree.com.
- c. Use the downloaded instructions to export a data file containing the next 3 months' appointments (or a file including all of your practice's providers, locations, appointment types, etc.) and e-mail it to installs@phonetree.com. A PhoneTree technician will review the file to ensure the required data to build your initial HealthWave configurations is present. **All information will be kept confidential.**

What To Do Next:

Congratulations! You are now ready to move forward.

Now that you've completed steps 1-4, please call **800.555.0559** (select option 3) or email installs@phonetree.com to schedule a **Consultation Session**. During this session, a PhoneTree Installer will:

- Assist with creating your Practice Management System data files
- Assist with creating your message scripts
- Discuss the parameters of your messages (i.e., how and when you will contact patients)
- Review other configuration items for further system customization

At your request, a list of the items that will be discussed during the session can be sent to you ahead of time for your review.

After we've gathered the required information, we will build your HealthWave system offline to your specifications and then schedule time to implement and train you on how to operate the system.

Thank you for choosing PhoneTree!

SUPPORT 800.555.0559 | phonetree.com/support



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