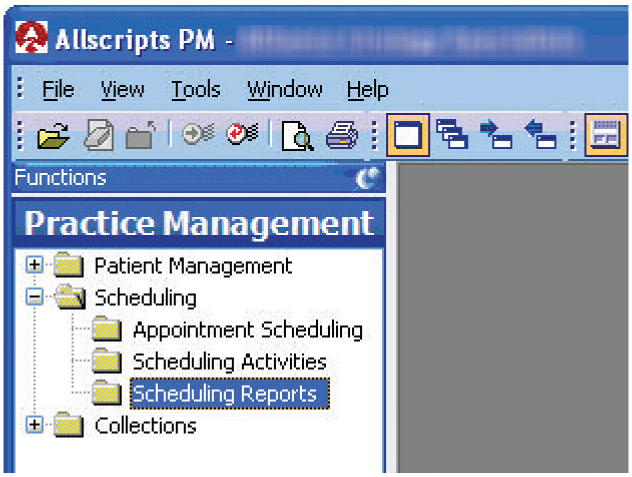
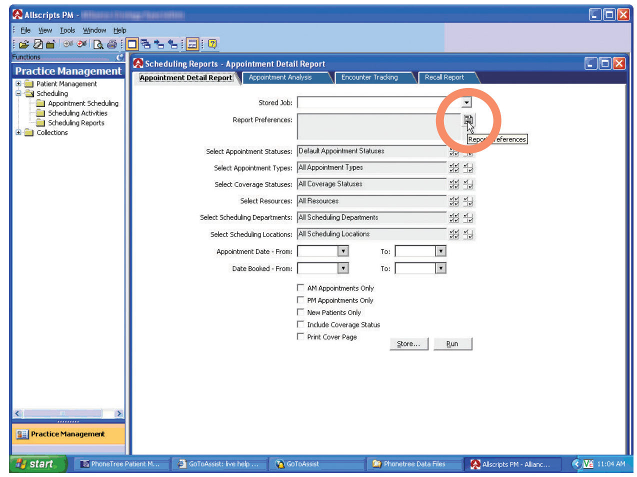
Getting Data From Your Practice Management System

Allscripts PM: Appointments - 3 Month Report

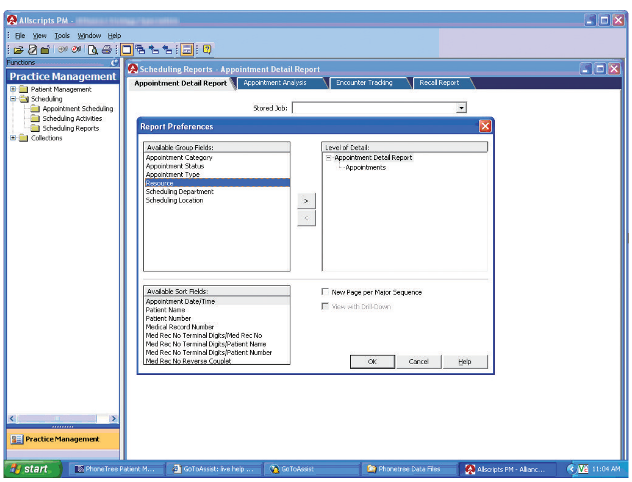
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will configure PhoneTree to read from this file. This one-time step is required for correct configuration. Here's how to do this using the Allscripts PM system:



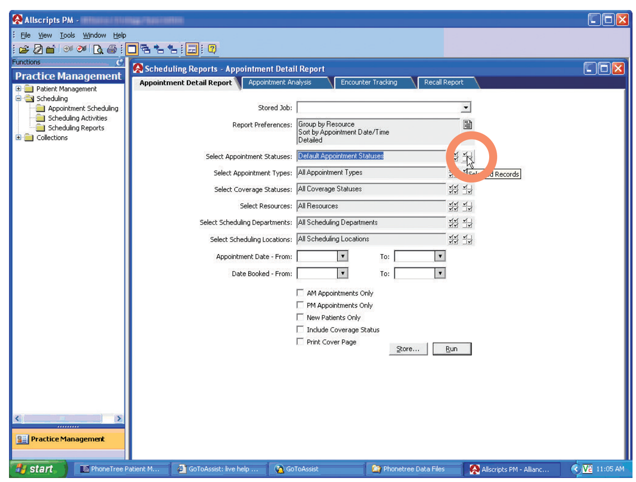
1. Open Allscripts PM to the main screen. From the folders on the left, expand **Scheduling** and select **Scheduling Reports**.



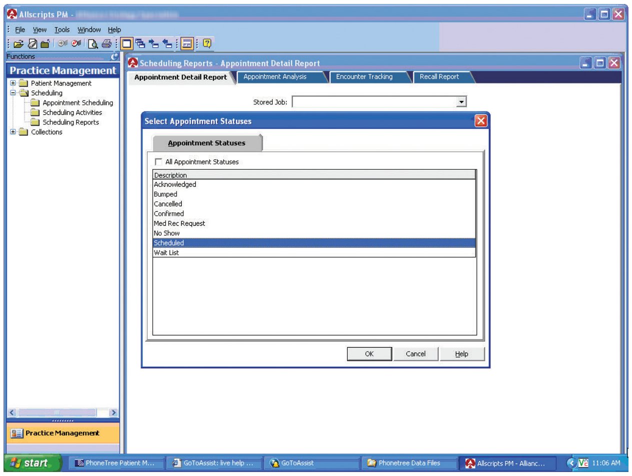
2. Click the **Appointment Detail Report** tab. Then, click the button for **Report Preferences**.



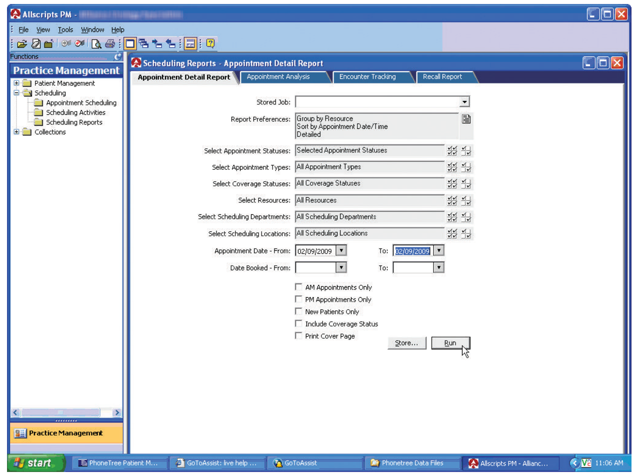
3. Under the **Available Group Fields** box, select **Resource,** then click the **>** button to move it to the **Level of Detail** box.



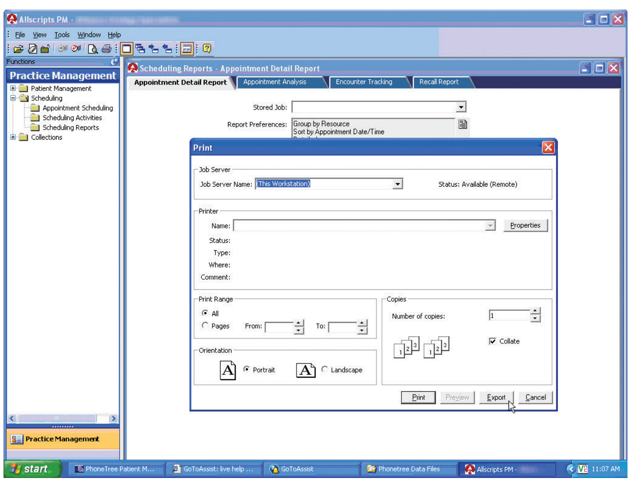
4. You will return to the Appointment Detail Report tab. For **Select Appointment Statuses,** click the **Selected Records** button.



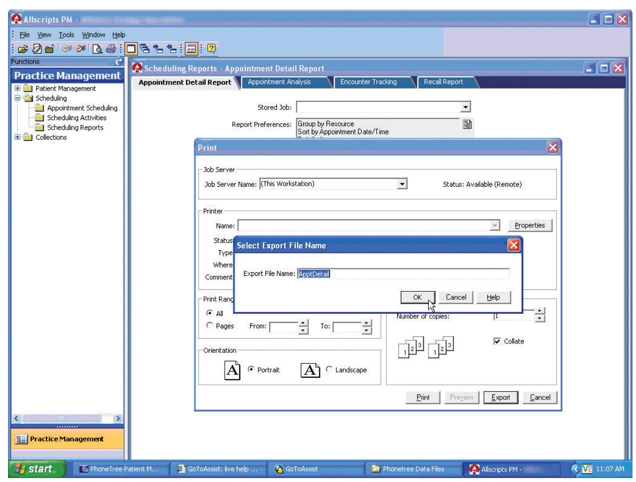
5. A new window appears. From the list under **Description**, select **Scheduled**, then click **OK**.



6. Next, make sure the following fields are set to "All": **Select Appointment Types**, **Select Coverage Statuses**, **Select Resources**, **Select Scheduling Departments**, and **Select Scheduling Locations**. Enter a 3 month appointment date range in the **Appointment Date From** and **To** fields. For instance, if today was 2/9/09, enter 2/9/09 in the **From** box and 5/9/09 in the **To** box. When finished, click **Run**.



7. When the Print window appears, click **Export**.



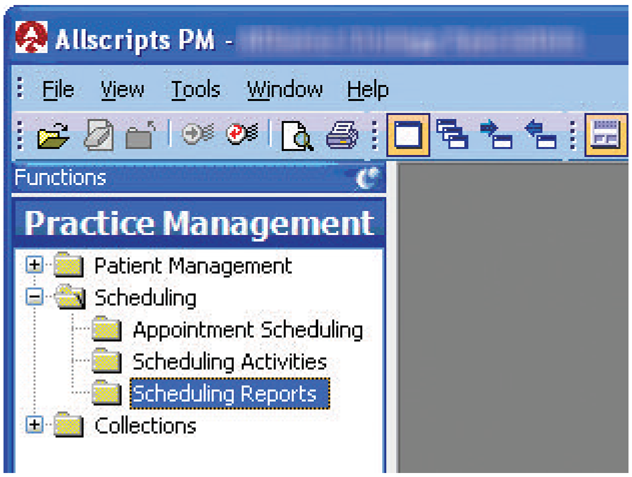
8. The Select Export File Name window will appear. In the **Export File Name** field, enter "ApptDetail." Then, click **OK**.

The Job Status window will appear. Once "Report Preparation Complete" appears under the **Job Status** column, your file has been created. You can locate it by browsing to the path shown under the **Export File** column. Congratulations – you're done!

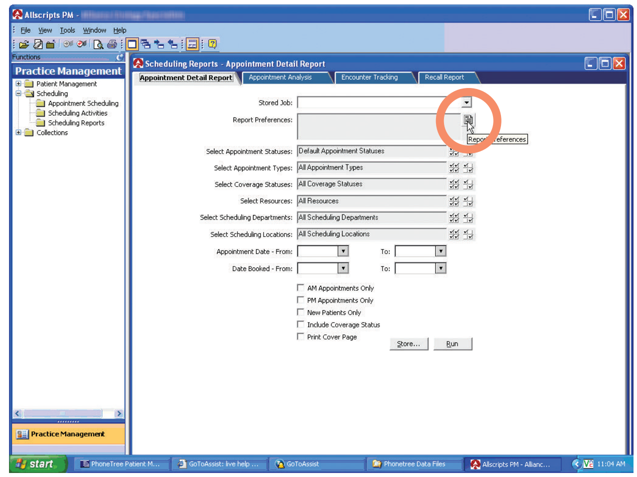
Getting Data From Your Practice Management System

Allscripts PM: Appointments - Daily Report

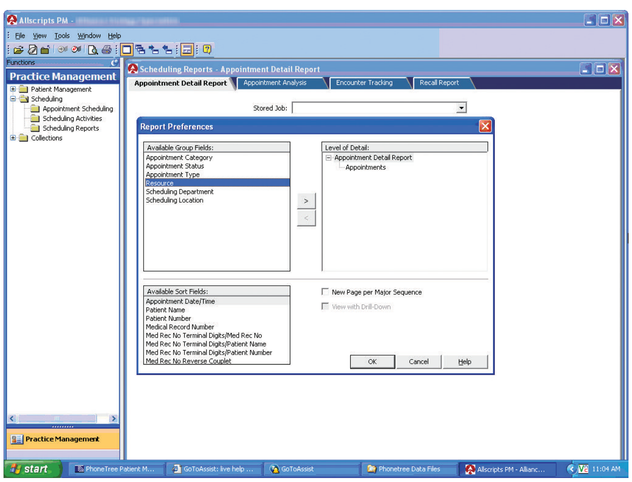
In order for your PhoneTree system to be custom-configured, it is necessary that you use your practice management system to save or export your daily appointment report. Place this file in a location where you will be able to browse to it from the PhoneTree computer. Your PCS support representative will 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 Allscripts PM system:



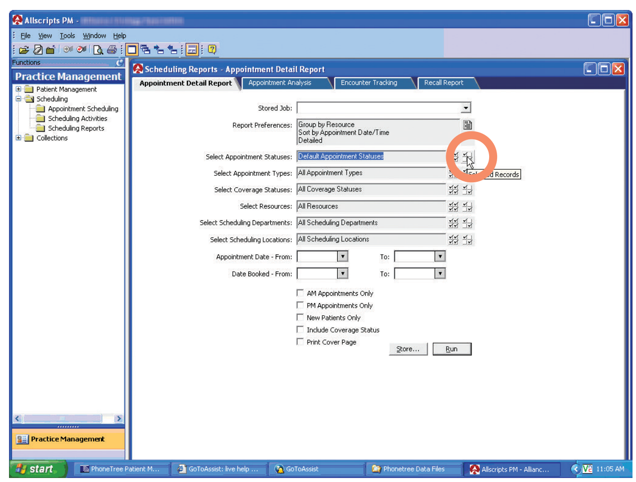
1. Open Allscripts PM to the main screen. From the folders on the left, expand **Scheduling** and select **Scheduling Reports**.



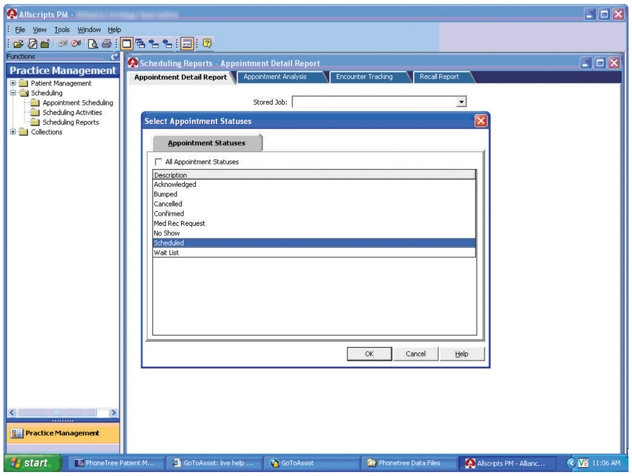
2. Click the **Appointment Detail Report** tab. Then, click the button for **Report Preferences**.



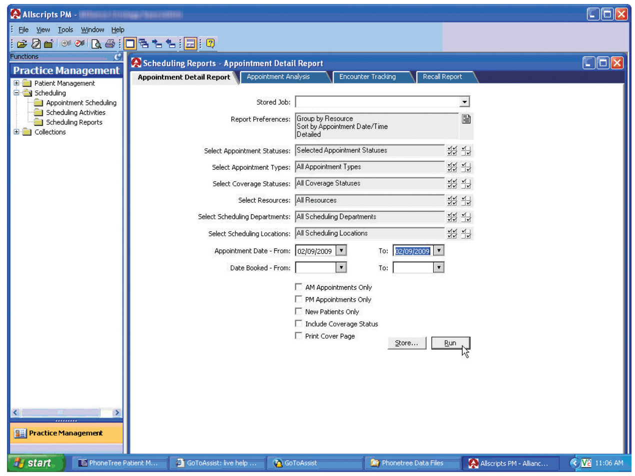
3. Under the **Available Group Fields** box, select **Resource,** then click the **>** button to move it to the **Level of Detail** box.



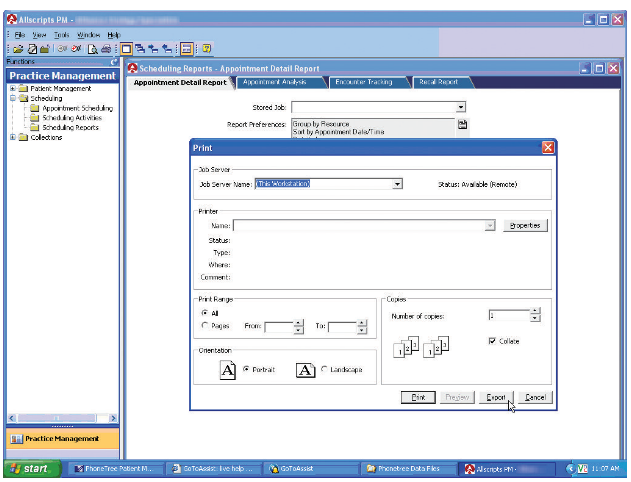
4. You will return to the Appointment Detail Report tab. For **Select Appointment Statuses,** click the **Selected Records** button.



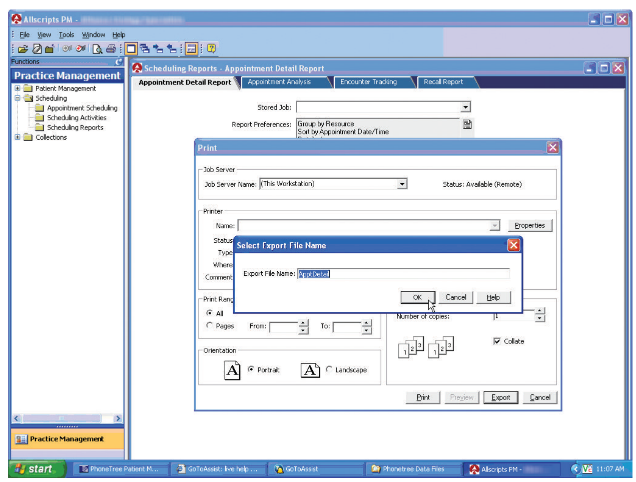
5. A new window appears. From the list under **Description**, select **Scheduled**, then click **OK**.



6. Next, make sure the following fields are set to "All": **Select Appointment Types**, **Select Coverage Statuses**, **Select Resources**, **Select Scheduling Departments**, and **Select Scheduling Locations**. Enter an appointment date range that reflects the date you wish to confirm appointments for in the **Appointment Date 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. When finished, click **Run**.



7. Once the Print window appears, click **Export**.



8. The Select Export File Name window will appear. In the **Export File Name** field, enter "ApptDetail." Then, click **OK**.

   The Job Status window will appear. Once "Report Preparation Complete" appears under the **Job Status** column, your file has been created. You can locate it by browsing to the path shown under the **Export File** column. Congratulations – you're done!