PhoneTree®
Proven. Professional. Trusted.™

USER **GUIDE**

Health**Wave**™ (Desktop)

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Introduction

Introduction

Welcome

Thank you for deciding to use PhoneTree® HealthWave™ to deliver your important reminder messages. This guide has been designed to walk you through each section of the setup, as well as troubleshooting for the most common questions.

We are always improving our product and support materials. For the latest **HealthWave User Guide** updates, please visit **phonetree.com/support**

Support:

In the event that you need assistance with your PhoneTree HealthWave system or have any questions, please contact PhoneTree Customer Support at: **800.555.0559** or **hcsupport@phonetree.com**.

Notice of Liability

The information in this book is intended to be accurate and useful with the operation of your HealthWave system. Personal Communication Systems, Inc. shall not have any liability for loss or damage caused by directly or indirectly using the instructions contained within this book or by the computer software and hardware products described herein.

Trademarks

The trademarked names used in this book are used for editorial purposes only and to the benefit of the trademarked owner with no intention of infringement of the trademark. We further state that PhoneTree, Proven. Professional. Trusted., HealthWave, PhoneTree G2PT and the PhoneTree logo are all trademarks of Personal Communication Systems, Inc.

Pre-Configuration Steps

Step One: Check System Requirements

*Note: The following requirements are for **HealthWave systems containing up to 4 lines**. For HealthWave systems larger than 4 lines, please contact Customer Support for recommended system*
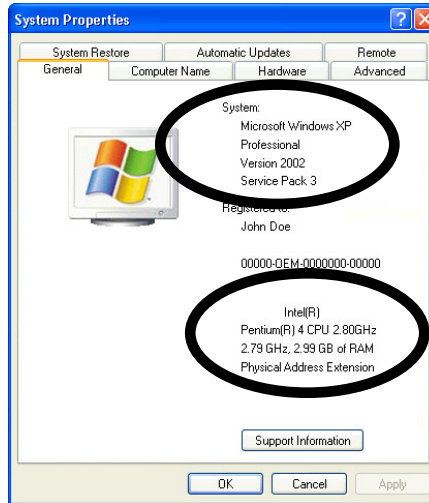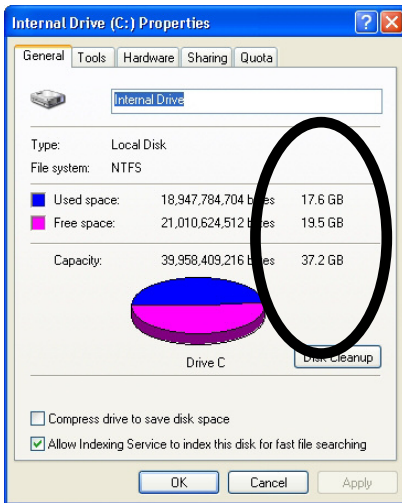
requirements.

Minimum System Requirements

- 1.4GHz 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)

- 1GB of RAM (2GB for Windows 7 64-bit)

- 5GB of hard-disk space

- CD-ROM Drive

- 1024x768 or higher resolution monitor

- USB port, minimum 1 USB port for each PhoneTree unit*

- Analog phone jack for each PhoneTree line

- High-speed Internet access (for remote installation and support as provided by PhoneTree Customer Support)

*A maximum of 24 line 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.

The PC that will be hosting HealthWave must be configured and installed on your office network.

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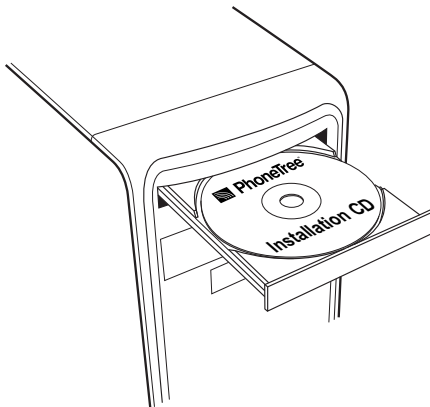
Step Two: Install the Software

Please Note: Before installing the VoiceWave 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 in the PhoneTree package, or download a copy from our website: **Installing on Windows 7** / **Installing on Windows Vista**.

1. **HealthWave Installation CD**

   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). Click **Next** and follow the on screen instructions. When prompted, enter the supplied **Serial Key** (found on the inside of the software case) 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.
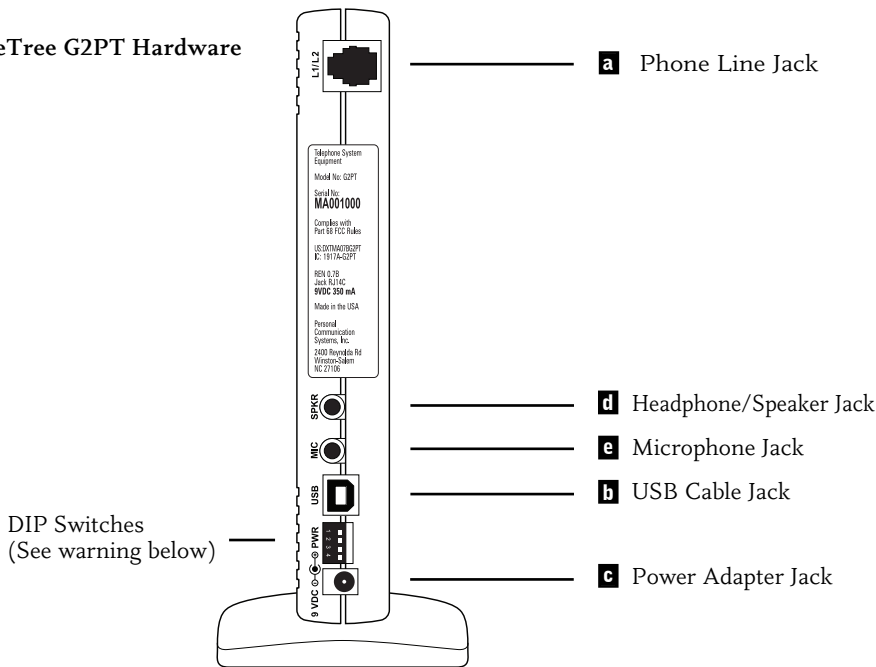
2. **Female and Male Voice Text-to-Speech CDs**

   First, 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.

PhoneTree G2PT Hardware

Telephone System Equipment
Model No: G2PT
Serial No: MA001000
Complies with Part 68 FCC Rules
US:DXTMA07BG2PT IC: 1917A-G2PT
REN 0.7B
Jack RJ14C
9VDC 350 mA
Made in the USA
Personal Communication Systems, Inc.
2400 Reynolda Rd Winston-Salem NC 27106

a Phone Line Jack

d Headphone/Speaker Jack

e Microphone Jack

b USB Cable Jack

DIP Switches
(See warning below)

c Power Adapter Jack

Step Three: Connect the Hardware

1. **Connect the phone cable**
   The G2PT's single phone jack design **(a)** has the ability to be configured for 1 or 2 Line capacity. Please see page 11 for instructions on how to connect to various wall jack configurations.

2. **Connect the USB cable**
   Using the supplied USB cable, connect the flat end to an available USB port on your PC and the square end to the PhoneTree's USB cable jack **(b)**. A USB cable is required for each PhoneTree hardware box (*if all of your USB ports are in use, see page 8*).

3. **Connect the power adapter**
   Connect the supplied power adapter to the PhoneTree's power adapter jack **(c)** and then insert it into a wall power outlet or power strip. **IMPORTANT**: Use of a third-party or universal power adapter can cause damage to your PhoneTree hardware and will invalidate your warranty. If a replacement power adapter is needed, please contact PhoneTree Customer Support at 800.555.0559 or hcsupport@phonetree.com.

4. **Connect the headset microphone**
   Using the supplied headset microphone, connect the Headphone plug, or a set of computer speakers, into the SPKR jack **(d)**. Next, connect the Microphone plug into the MIC jack **(e)**, located right below the SPKR jack. **Note**: If using more than one unit, make sure that the headset microphone or speaker set is connected to the unit that contains lines 1-2.

Caution! (DIP Switches)

The DIP (Dual In-Line Package) Switches are pre-configured from PCS and should only be adjusted if there is an installation problem as described on page 14. For information on how to properly set the DIP Switches, please see page 96.

Step Four: Install the Hardware Drivers

After the hardware steps on the previous page are completed, your computer may prompt you for permission to install the hardware drivers for Windows. Check with your IT personnel to make sure the Windows user login you plan to run HealthWave with has the correct permissions associated with it. If the permissions are not set high enough, Windows will prevent you from moving further with the installation.

If you are using Windows XP, Windows Vista or Windows 7, you will be required to install the drivers manually:

Windows XP

Choose **No**, **not this time** and click **Next**. Choose **Install the software automatically**


(Recommended), then click **Next**.

Next, you will be informed that the drivers have not passed Windows Logo testing. Be assured that it is 100% safe to install the PhoneTree drivers on your computer. Click **Continue Anyway** to proceed. Windows will prompt you to do this several times until the hardware is fully installed.

Note: If you accidentally pressed **STOP Installation**, unplug the power adapter from the Phone-
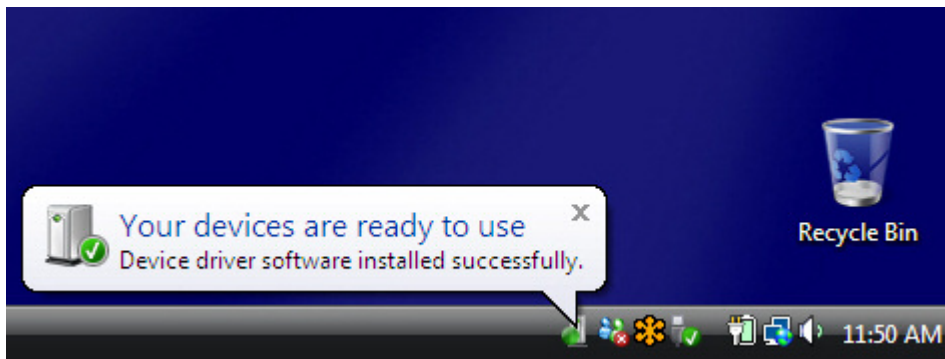
Windows Vista/Windows 7

You may see the warning screen below. Be assured that it is 100% safe to install HealthWave on your PC.
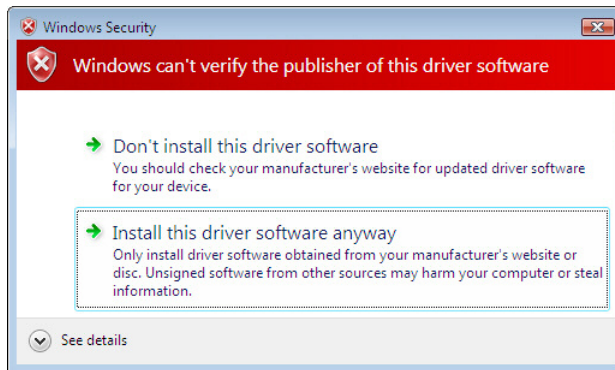
Please click **Install this driver software anyway**.

It may take a few minutes for Windows to recognize the PhoneTree device drivers. When you see the above message appear in the lower right corner of the screen, the PhoneTree hardware has been successfully installed.

Step Five: Connect Analog Phone Cable

The G2PT's single phone jack design allows it to be used for either a 1- or 2-line system. The number of PhoneTree lines you purchased will determine how many PhoneTree hardware units you have. For example, if you have ordered a 4-line HealthWave system, you will have two PhoneTree units: one unit representing lines 1-2 and the other for lines 3-4. By using the supplied cables and adapter, each PhoneTree unit can be configured to work with most any analog wall jack. Using the examples below, choose the wall jack configuration that you will use and connect your analog phone cable(s) as instructed.

Note: These illustrations represent connections for *one* G2PT PhoneTree hardware unit. If you have more than one PhoneTree unit, you will need additional wall jacks enabled for each unit.
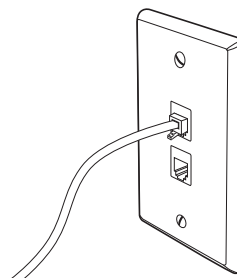
**Single, Analog Wall Jack
(1-Line PhoneTree Unit)**
or
**Single, 2-Line Analog Wall Jack
(2-Line PhoneTree Unit)**
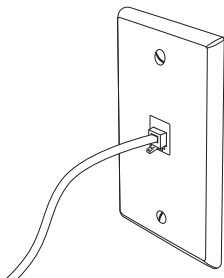
Connect the PhoneTree unit to the wall jack using the 7-foot phone cable.

2-Wire Jack

4-Wire Jack

Duplex Adapter

The Duplex Adapter (included with each PhoneTree G2PT unit) has been specially wired for exclusive use with the Duplex Analog Wall Jack (2-Line) configuration. ***It will not serve as a standard splitter.*** This adapter is not found in stores and is only sold directly from PhoneTree.

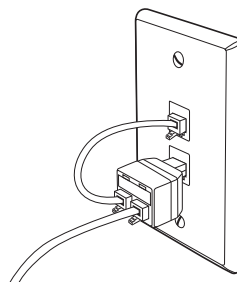**Duplex Analog Wall Jack
(1-Line PhoneTree Unit)**

Connect the PhoneTree unit to either wall jack using the 7-foot phone cable.
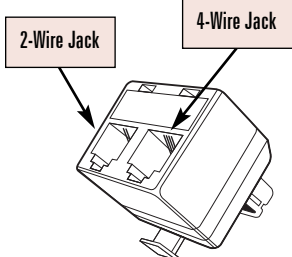
**Duplex Analog Wall Jack
(2-Line PhoneTree Unit)**

Connect the PhoneTree unit to the 4-wire jack on the duplex adapter using the 7-foot phone cable.

Plug the adapter into either wall jack.

Using the 4-inch phone cable, connect the 2-wire jack on the duplex adapter to the remaining wall jack (see figure above).

Step Six: Verify Device Connection

Check to see if your PC recognizes your PhoneTree unit by doing the following:

For Windows XP users:

1. From your Desktop, right-click on the My Computer icon and choose Properties. Click on the Hardware tab and then click the Device Manager button.

For Windows Vista/Windows 7 users:

1. From your Desktop, click Start (Windows logo) and in the Search bar enter "device manager." From the results that appear, click on the Device Manager link.
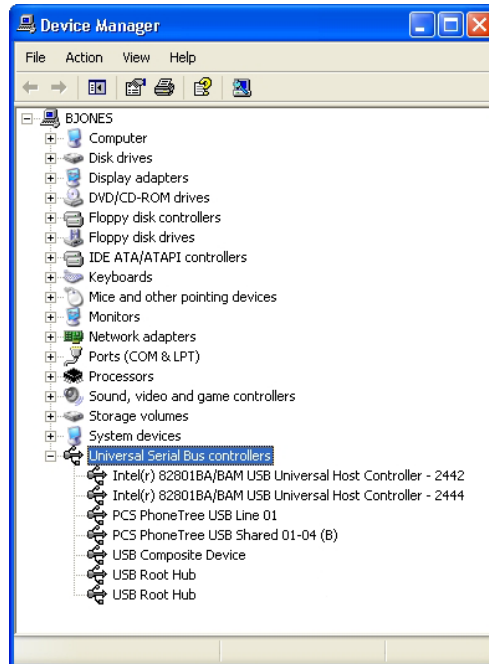
2. Locate Universal Serial Bus controllers.

3. Click on the "+" sign next to its icon.

4. You should see the following devices (exact descriptions vary) at a minimum:

    Host Controller

    USB Root Hub

    PCS PhoneTree USB Line 01 (if you do not see the correct number of installed lines AND if you have purchased more than 2 lines, follow the instructions in the **Troubleshooting: Checking DIP Switches** section on page 96).

    Other devices may be present. Leave this window open in order to complete the next step.
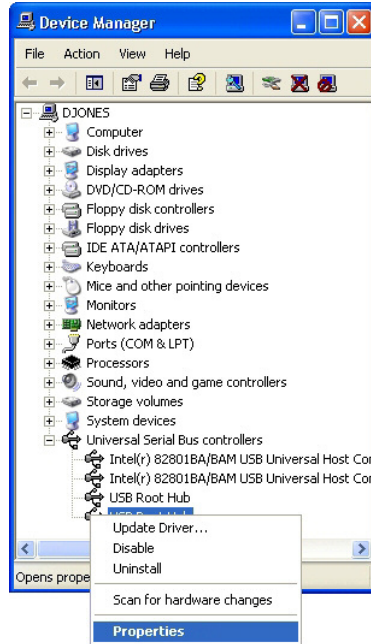
Step Seven: Disable Power Management

For Windows XP, Windows Vista and Windows 7:

To manage power, Windows will attempt to disable USB functionality when a device is not used. As the default behavior, this often does not work correctly and may cause Windows to not properly recognize any USB device (including PhoneTree). Because the default power management setting often causes problems for PhoneTree and other USB devices and because you already have the Device Manager open, go ahead and change the setting by completing the following steps:

1. Under the Universal Serial Bus Controllers branch, right-click a **USB Root Hub**, and then choose **Properties** (see picture at right).

2. Click the **Power Management** tab.

3. Disable **Allow the computer to turn off this device to save power** (see picture at right).

4. Repeat Steps 1-3 for each USB Root Hub in your Device Manager.

5. Click **OK**, and close the Device Manager.

Step Eight: Turn Off PC Hibernation

For Windows XP:

The Windows hibernation or another power management function sometimes interferes with the operation of your PC when left idle, which can cause problems when using PhoneTree. To resolve this:

1. Right-click on a blank area of your desktop and choose **Properties**.

2. Click on the **Screen Saver** tab.

3. Disable your screen saver by choosing "**None**" from the drop-down, then click the **Power** button (see picture at right).

4. Once the **Power Options Properties** window opens, click on the **Power Schemes** tab. Make sure that the settings for your selected scheme include the **Never** setting for **Turn off monitor**, **Turn off hard disks** and **System standby** (see picture below right). Now click on the **Hibernate** tab.

5. Make sure the **Enable hibernation** option is NOT selected on this Hibernate tab. Click **OK**, then click **OK** on the **Display Properties** screen.
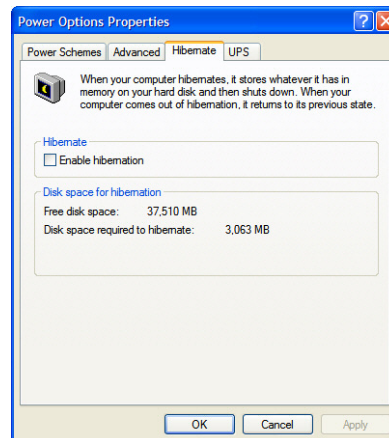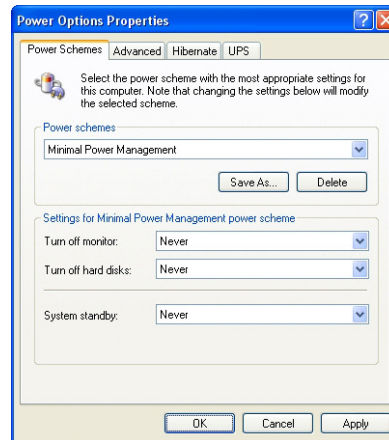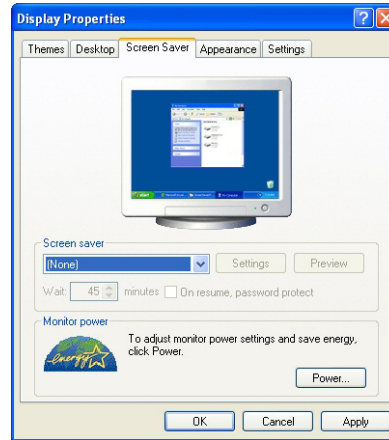
For Windows Vista/Windows 7:

1. Right-click on a blank area of your desktop and choose **Personalization**.

2. Click on the **Screen Saver** link.

3. Disable your screen saver by choosing **None** from the drop-down menu, then click **Change power settings...**
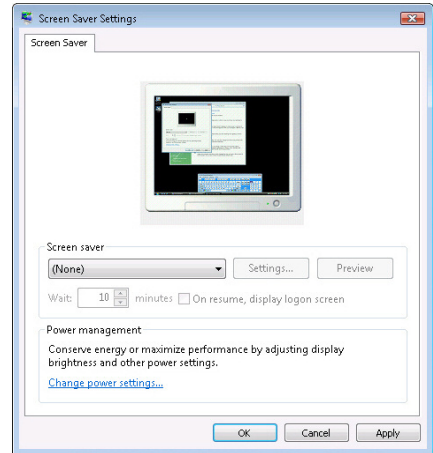
4. On the **Power Options** screen, under **Select a power plan**, click **Change plan settings** for the current power plan you are using.

5. Once on the **Edit Plan Settings** screen, set drop-down menus for **Turn off the display** *and* **Put the computer to sleep** to **Never**. Next, click on **Change advanced power settings**.
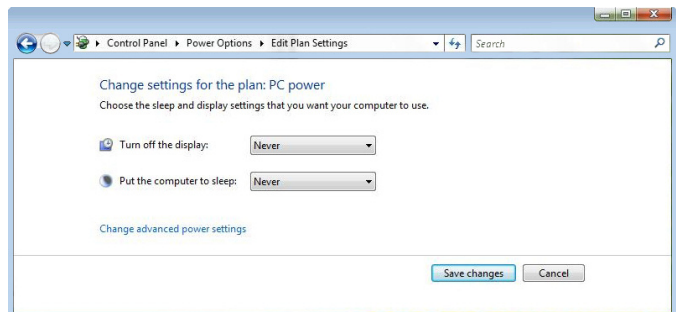
6. From the list of advanced settings, click the "+" sign next to the following items:

   Hard Disk: set **Turn off hard disk after** to 0 minutes. This will change the setting to Never.

   Sleep: set **Sleep after** and **Hibernate after** both to 0 minutes.

   Display: set **Turn off display after** to 0 minutes and **Adaptive display** to Off.

When finished, click **Apply** and then **OK**. You will return to the Edit Plan Settings tab. Click **Save changes** to exit.

17
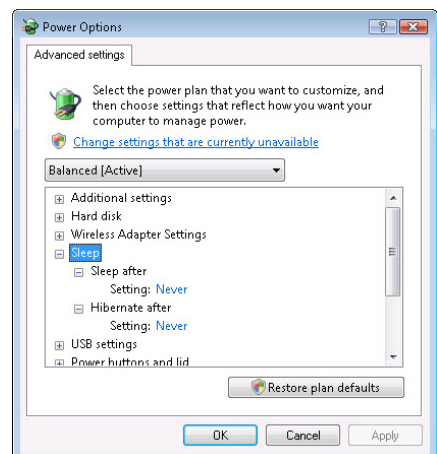
Step Nine: Generate File(s) from your Practice Management System

In order for HealthWave to make calls to your patients, you must use your practice management system to export both:

1) Your **daily** appointment report (the file from which HealthWave will make calls every day), and:

2) An initial **three-month** report (used for one-time configuration)

Place these files in a known folder location (consider creating C:\HealthWaveDataFiles) where you can browse to them from the HealthWave computer. Once configured, each day HealthWave will read the daily appointment file and use it to make calls.

Each practice management software package (PMS) has a different way of exporting a file that HealthWave can use. In many cases, we have instructions for your PMS available at:
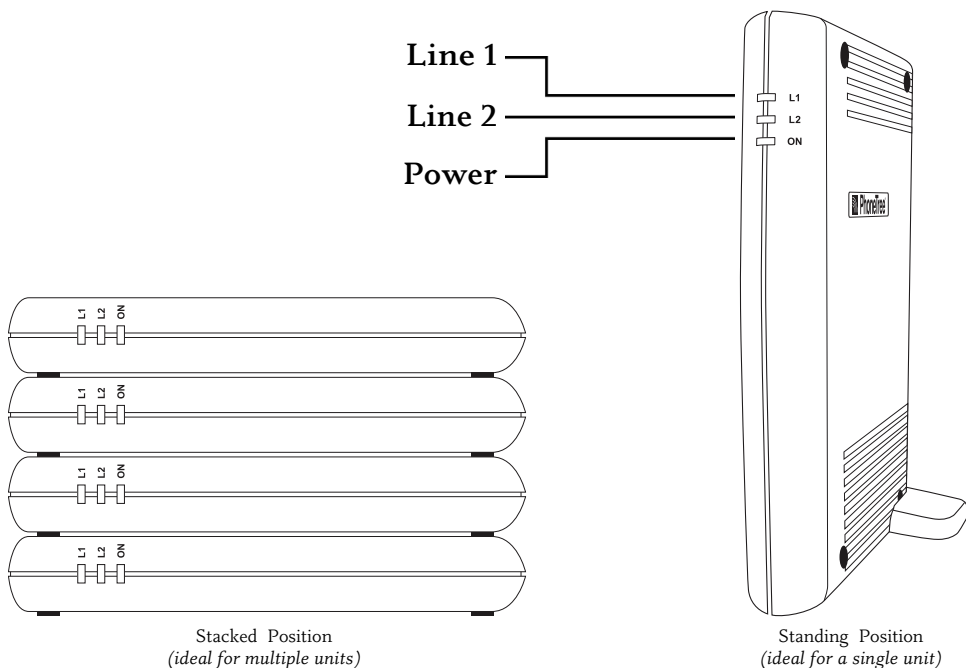
phonetree.com/appointmentfilehelp

This site contains downloadable instructions for many of the PMS systems available, in PDF format for easy viewing and printing.

PhoneTree G2PT Hardware Operation (While In Use):

The PhoneTree G2PT hardware has been designed to stand upright or, if you have more than one unit, stacked on its side to save room.

While in operation, the PhoneTree unit will use the built in LEDs to display the activity. Below is a description for each LED and how it functions:

Line 1
Line 2
Power

Stacked Position
(ideal for multiple units)

Standing Position
(ideal for a single unit)

L1   (Line 1): This **yellow** light illuminates only while your PhoneTree unit is making a call on Line 1 and briefly turns off while switching between calls.

L2   (Line 2): Corresponds to the second phone line (if enabled) and is otherwise the same as Line 1 in color and functionality.

ON   (Power): This **green** light illuminates while your PhoneTree unit has power, regardless of whether it is making calls or not.
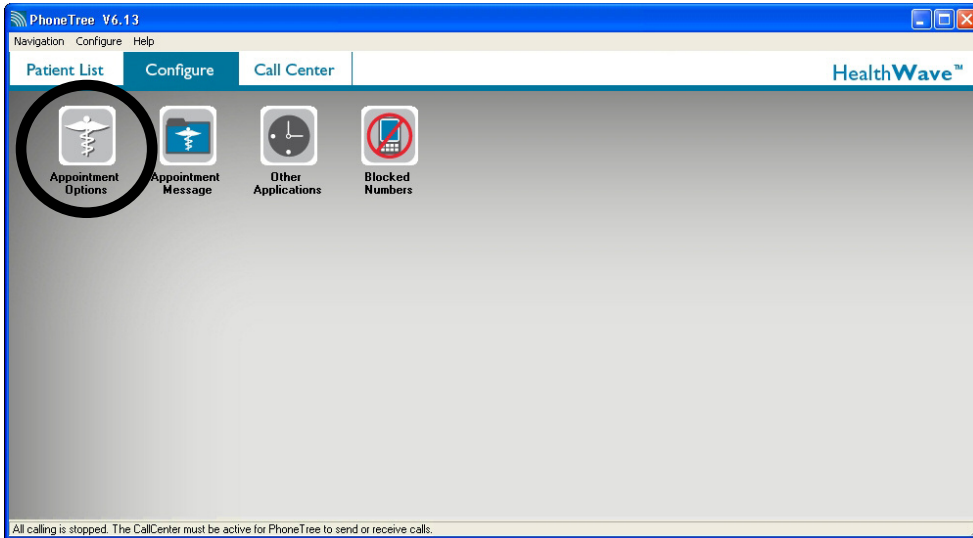
Interference

If your PhoneTree hardware experiences radio interference while making calls, install a ferrite clip on the phone cable close to the PhoneTree's phone jack.

Notes
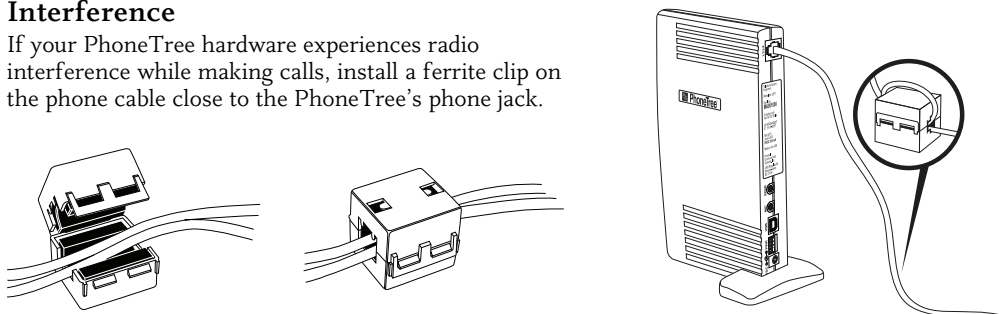
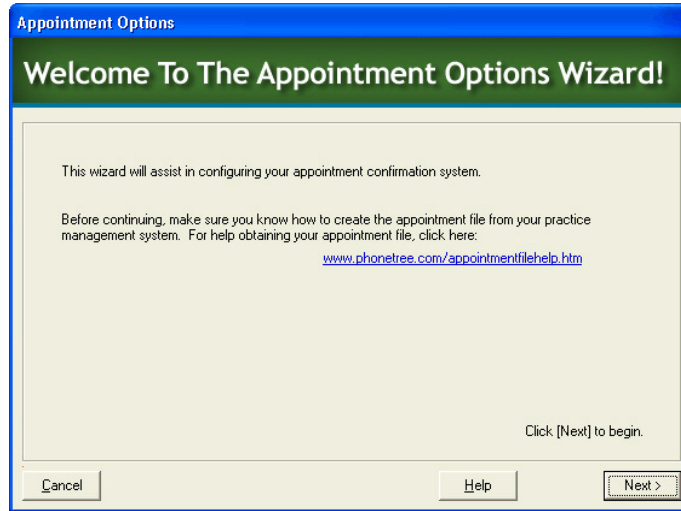# Configurations:

- **Appointment Options**
- **Message**

Configurations: Launch the Appointment Options Wizard

Step One: Launch the Appointment Options Wizard

Click the **Appointment Options** icon.

This is the first Appointment Options wizard screen, reminding you that you should be able to generate the necessary files from your practice management system before proceeding. If you need instructions on how to do this, click on the **www.phonetree.com/appointmentfilehelp** link provided.

Click **Next**.

Step Two: Appointment File

On this screen, select either **One appointment file** (if you only exported one file from your PMS) or **Multiple appointment files** (in the event your PMS requires you to export more than one file for HealthWave to use for daily operation — if you select this option, the preselected location where the files need to be saved will appear or you can use the **Browse...** button to manually choose a different location).

Then click **Browse…** to navigate to the location of your daily appointment report(s). We recommend you save your daily appointment file to a known folder location (consider creating C:\HealthWaveDataFiles) where you will be able to browse to them from the HealthWave computer. Once configured, each day HealthWave will read the daily appointment file(s) and use it to make calls. Once you have chosen the path to your daily appointment file, the pathname will appear to the left of the **Browse…** button. **Note that HealthWave will look for this file name and location every day**.

Now, choose one of the three options under **Select when PhoneTree will import your appointment file**:

a) **Wait for the above file to be created each day** (Recommended) We suggest you choose this option, because as soon as your daily appointment report appears in the above location, HealthWave will automatically read the file and use it to start calls during your desired calling window. Note that this choice is not available for the **Multiple appointment files** option.

b) **Look for the file at this time**, **on these days** Choose this option if you know you only want to call after a certain time of day and/or on certain days of the week. **Important**: If the above file is not in the above location at the specified time, HealthWave will not be able to start calls automatically for that day and the Task tab must be used to manually start calls.

c) **I will start my calls manually each day** (not recommended) If you select this option, the Task tab will appear (between the Patient List and Configure tabs) and you would need to click on the Task icon any time you want to start your appointment calls. As in the previous choice, if the above file is not in the above location when the icon is clicked, HealthWave will not be able to start calls.

Click **Next**.

Step Three: Practice Management System

From the drop-down box on the left, choose the vendor that supplies your practice management system (PMS). Then from the drop-down box on the right, select the name/version of your PMS. In the event that your PMS does not appear in the list, contact PhoneTree Customer Support at **800.555.0559** or **hcsupport@phonetree.com** and let us know what practice management system you are using, so that we can work with you to create a translator that will work with your PMS.

Note: If you are returning to this screen after original configuration and choose a new practice management system format, you will receive a warning that you are about to reset all of your message settings and configurations.

Click **Next**.

Step Four: Import Results

This screen allows you to check the results of the data import. The information in each box reveals what HealthWave found for each of these three categories. For instance, in the example above, we can see that 5 **Providers**, 3 **Locations** and 15 **Reasons (Appointment Types)** were detected. Later we will map these numbers to the actual Provider/Location/Reason names, but for now, we only need to confirm that the information in these boxes is correct. In addition, we recommend you look at the patient names that HealthWave found by clicking the **Preview patient list…** button.


Here we can see that for this file, the patient names, phone numbers and associated appointment information were imported correctly. If your data is incomplete or incorrect, your data file may require customization — contact us at **800.555.0559 or hcsupport@phonetree.com**. Be sure to include the name of your organization and a phone number. Click the cancel **X** in the upper right corner to close.

Click **Next**.
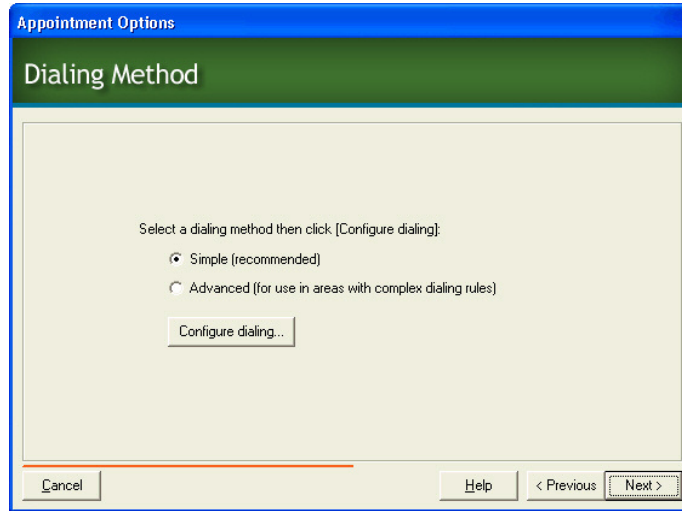
Step Five: Dialing Method

Here, you tell HealthWave how to dial the numbers for your patients, based on your own unique dialing rules set by the phone company. You will need a copy of your local telephone directory to complete this step.

Usually phone numbers are stored (and exported) in only one format when using a practice management program. Therefore, when importing data, HealthWave will most likely need to translate the phone numbers before they can be correctly dialed. For instance, your database program may store a person's phone number as ten digits (including area code), however, if this number is a local call for your office, you would need to dial it as seven digits.

We recommend using the **Simple Method** if possible, since it is easier to set up. You will be able to use the Simple Method if either or both of the following statements apply to you:

a) If your phone company requires that you always dial ALL numbers as 10 or 11 digits

b) You need to dial some area codes differently from others, but ALL numbers within a single area code follow the same rule (for example, some of your patients live in the local area code and all of them need to be dialed as 7 digits, but ALL the other area codes you need to dial require 11-digit dialing)

If your phone company requires you to dial some numbers within a single area code differently from others, you will need to use the **Advanced** dialing translator. This is a one-time step that will not need to be repeated unless your phone company changes your dialing rules.

Choose a method then click **Configure dialing**....
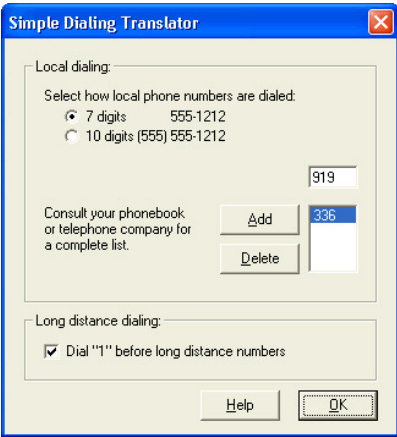
Simple Method

Under **Local Dialing**, select how local numbers are dialed in your area by choosing either **7 digits** or **10 digits** (if your area supports both, you will need to use the **Advanced Method** below). Next, in the box provided, enter any area codes for which ALL possible numbers in that area code called can be correctly dialed with 7 digits or 10 digits. Enter each three-digit area code, then click **Add**. To remove any entered area codes, click on an area code and then click **Delete**.

Check the box next to **Dial "1" before long distance numbers** if you are required to dial long-distance numbers preceded by a "1", but your imported data doesn't include the "1" digit.
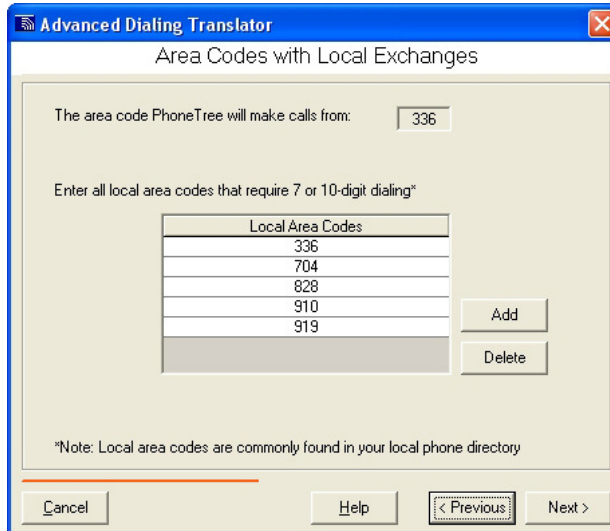
When finished, click **OK**.
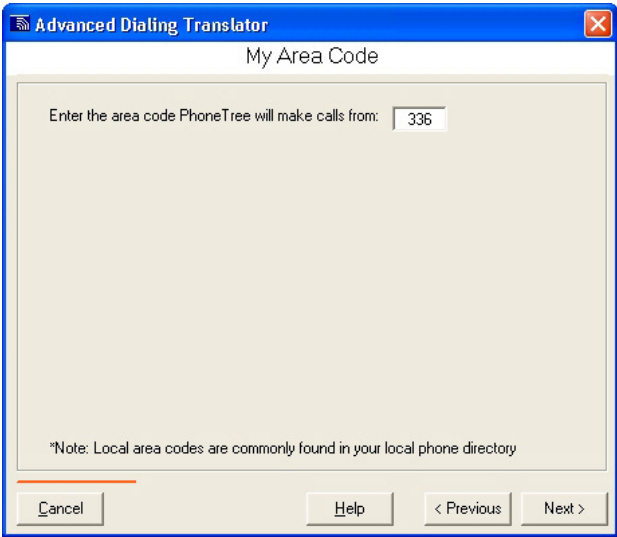
Advanced Method

a) Start by entering the area code from which HealthWave will make calls, then click **Next**.

b) On this screen, enter any other area codes you will need to dial that will require 7 or 10-digit dialing. It is not necessary to include other area codes for which all calls made need to be dialed with 11 digits. For each area code you need to add, click the **Add** button, type the three-digit area code and click **OK**.

When you have finished adding area codes, click **Next**.

(336) 722-5008
Area code   exchange   number

c) Now you must specify the local exchanges for the first area code. The list of all the possible exchanges will appear in the box under 11-digits. Keep in mind that most of the numbers you dial from day to day are probably dialed locally (usually 7 digits), however the majority of possible exchanges within your area code would need to be dialed as long-distance (usually 11 digits).Therefore, in most cases, most of the possible exchanges will remain in the 11-digit column for your area codes. For instance, all the possible exchanges (from 200 to 999) will appear in the box labeled 11-digits. Now, click the **Add** button under another column (either 7-digit exchanges or 10-digit exchanges) and, taking the information from your local telephone directory, enter those exchanges that should be dialed locally in the box(es) provided. Press [Enter] after each exchange.

The HealthWave software will automatically remove an exchange from the 11-digit column when you enter it in another column. If you make a mistake and enter an exchange in one of the exception columns incorrectly, select it in the column, then click **Delete**. When you are finished adding all necessary exception exchanges, click **Next**.

d) Repeat the above step (Step c) for any other area codes you entered in step b.

Click **Next**.
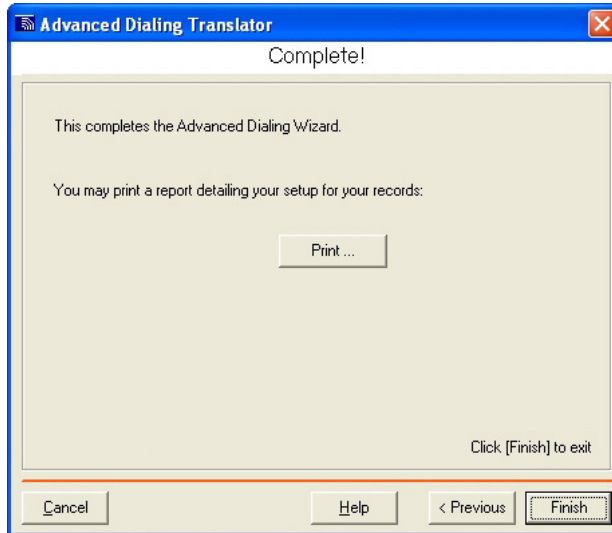
e) Once you have finished configuring each area code, you will see a confirmation screen which includes the option to print a report reflecting the choices you made. Click **Finish**, then Next.
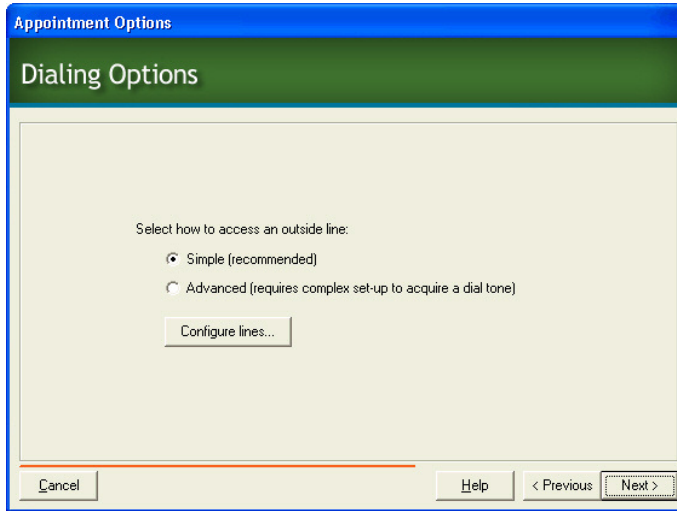
Step Six: Dialing Options

Your office phone system may require a prefix (such as 8) to be dialed before each number in order to reach an outside line, or perhaps you wish to use a special billing prefix for long-distance numbers only. You will use either the **Simple** or the **Advanced** tool here to configure your phone line(s), based on the unique needs of your office.

Choose **Simple** if all your PhoneTree lines will be able to be configured the same for both local and long-distance calling.

Choose **Advanced** if your situation requires more customization in order to reach all of your patients. **Note**: If you do not know what is required on your office phone system in order to dial out, contact your phone system provider.

Choose an option then click **Configure lines**....
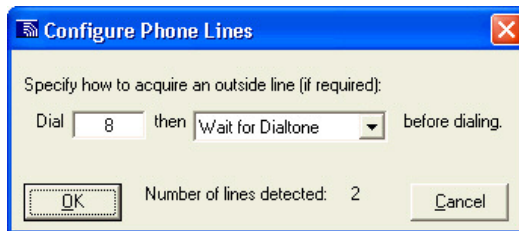
Simple Method

Enter any prefix required to reach an outside line in the **Line Access** box, and choose **Wait for Dialtone** from the drop-down box unless directed otherwise by PhoneTree Customer Support. The number of correctly-connected PhoneTree lines detected by the software will be also be displayed here. Click **OK**.
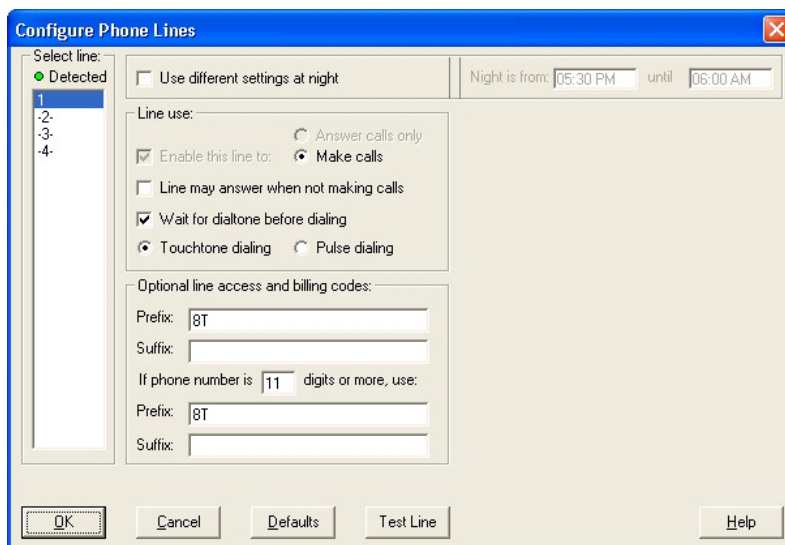
Advanced Method

Your line cards inside your PhoneTree hardware are represented in the list on the left as numbers. Lines correctly configured and recognized by the HealthWave software will be displayed on the screen as a number, and when selected, a green dot and the word **Detected** will appear. If a PhoneTree line is not recognized by the software, it will be displayed between two hyphens. In this example, we can see that this is a one-line HealthWave system, because only Line One is recognized by the software.

In the **Line Use** box, set each line to be Enabled for **Making calls**. Leave **Line may answer when not making calls** unchecked, and we recommend you not change these other two options.

In the **Optional line access and billing codes** box, you may enter one or more necessary digits in the **Prefix** and/or **Suffix** box. For instance, if you need to dial 8 to reach an outside line from your office, enter 8T in the Prefix box ("T" is a code which directs HealthWave to wait for a dialtone before dialing the rest of the number). If you need to dial a line access code for long-distance numbers, enter it in the lower Prefix box. Because our long-distance calls in this example also need to be prefaced by 8, we'll enter "8T" in this prefix box as well. You would not need to enter a 1 in the LD (long-distance) Prefix box.

If for some reason these settings would need to be different during evening hours, check the box next to this option, specify the time frame for night settings in the space provided at the upper right, and make the appropriate changes. If not, as in our example, uncheck the box, then click **OK**. Now your HealthWave system is ready for making calls.

Now that you are finished with Dialing Options, click **Next**.

Step Seven: Call Delivery Options

Here, you will be able to specify how you want HealthWave to handle multiple and family appointments in your practice management data file, when to start and stop calling, and more.

Choose **Simple** if you wish to specify the same call window for each day and to keep the other settings at their defaults.

Choose **Advanced** if you want the call window to vary from day to day and/or you want control over other HealthWave calling options.

Choose an option and then click **Configure options**....

Simple Method

On this Simple Call Options screen, enter your desired **Don't call before** and **Don't call after** times, then click **OK**. Remember that HealthWave uses your computer's system clock when determining time, so be sure that the PC's clock is always set correctly.
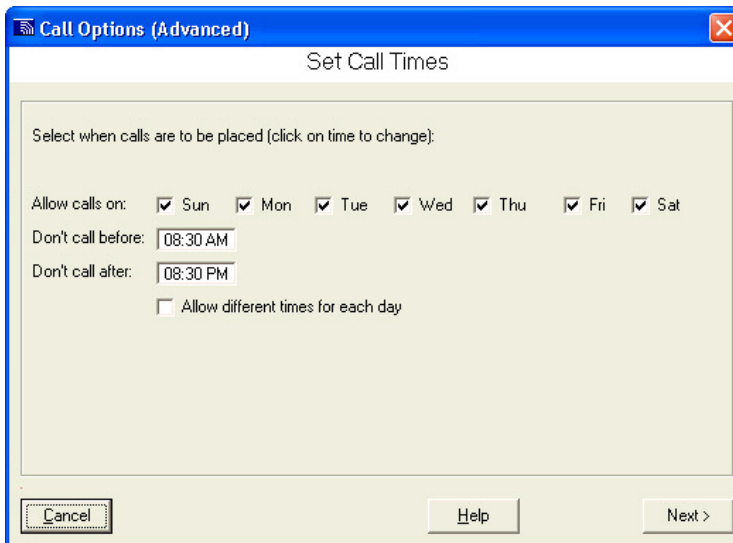
Advanced Method

On this first screen, choose the call times desired. These can vary from day to day if the box next to **Allow different times for each day** is checked. You may also de-select certain days, if you know you would not like to call on one or more days (for instance, the weekend). Note that you are setting the call window for these days, however based on the selections you made under **Select when PhoneTree will Import your appointment file** (see page 24), calls may not begin until your daily appointment report appears. Click **Next**.

With the options on this screen, you have the ability to change several things:

a) **Pause Calls**: Temporarily pause calls during a time you specify and resume at a later hour. This helps with attempting patients at a later time in the day. Enter your desired **Pause** and **Resume** call times in the boxes provided.

b) **Connection Options**: We recommend you leave these set to their defaults, however you might want to change these to handle certain situations. For instance, to move through a list of patients quicker, you could reduce the **Max number of rings before moving on to next call** from 7 to a lower number (keeping in mind that many answering machines pick up after the fourth ring).

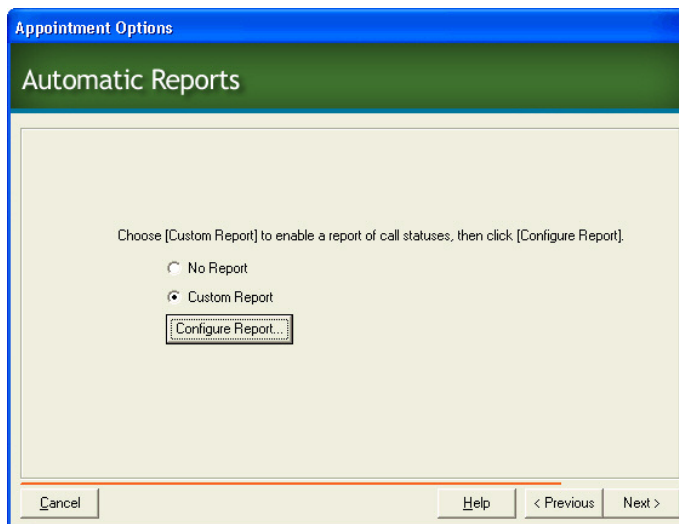When finished making changes to these settings, click the **Next** button.

Here, you can set HealthWave to leave your message on a patient's answering machine, how often to retry a busy or unanswered phone number and how to handle multiple and family appointments:

a) **Answering Machines:** Select on which attempt you want HealthWave to leave a message on an answering machine. Choose from **On first attempt**, **On second attempt** or **On third attempt**.

b) **Busy/No Answer:** Select the number of retries HealthWave makes to a busy or unanswered phone number. Once all retries have been exhausted, no further attempts will be made to that phone number for that call job. Choose from **3**-**8** retries.

c) **Multiple Appointments:** If a single patient has more than one appointment scheduled in a single day, you can select how HealthWave will handle this. Choose from **Call for earliest appointment only** or **Call once for each scheduled appointment**.

d) **Family Appointments:** If there is more than one patient at the same phone number with appointments scheduled on a single day, choose either to **Call each patient separately** or **Combine family appointments into one call**. Choosing the second option results in a message similar to: *This is Northside Medical calling to remind John that you have an appointment with Dr. Smith on Wednesday, October 24, at 10:30 in the morning and Sarah that you have an appointment with Dr. Brown on Wednesday, October 24 at 11:45 in the morning. We'd like you to confirm...* This will vary somewhat from message template to message template. Note also that the **Patient Name** option must be selected on the first **Message Options** screen of the Appointment Message wizard.

When finished making changes to these settings, click **Finish**.

Now that you are finished with the Call Options, click **Next**.

Step Eight: Automatic Reports

HealthWave can automatically send a final call status report via e-mail to your printer and/or to a file on your PC's hard drive. To enable this feature, select **Custom Report**, then click **Configure Report**.

Enter your practice's name in the **Practice name to appear...** box. Next, choose how you would like to receive your Automatic Reports:

E-mail: Select **E-mail a call status report**. Then, enter the appropriate information in the **To** and **Subject** boxes (you can send this report to multiple addresses by separating them with a comma in the **To** box). Then click **Configure E-Mail** (see pages 40-41 for configuration instructions).

Print: Select **Print a call status report**. From the drop-down box, choose from the printers you have installed on your PC or network.

File: Select **Write a call status report to a file**. Click **Browse** and choose a folder on your PC or network in which to save your reports as they are created. Then, choose the format(s) you want your reports saved as by selecting **CSV**, **PDF**, or both. **Note:** At least one format must be selected.

To sort your reports by a certain field, choose up to three different fields and the order for them to be arranged under **Sort Order**.

Click **OK**, then click **Next**.

Configure E-Mail

The settings on this screen must correspond to a valid e-mail account, and you can get most of these values from the E-mail Accounts area of your e-mail program, like Outlook or Outlook Express.

Under **User Information**, your name should be entered as you'd like it to be seen by the people on your list. The e-mail address should be a valid e-mail address which corresponds to all the other settings here on this screen.

The **Logon Information** you enter should be the exact **User Name** and **Password** you typically use to access this e-mail account.

Under **Server Information**, the **Hostname** should be entered exactly as you have it entered in your main e-mail program.

Once you believe you have all the options set correctly, click the **Test E-Mail Settings** button.
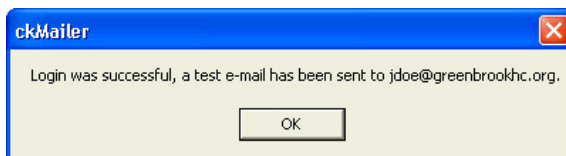
If all settings are correct, the above window will appear with the following message: *"Login was successful, a test e-mail has been sent to ‹e-mail address›."* **Check this e-mail account** to see that the test e-mail message has been received.

If you do not receive these messages, it means that one or more of your settings are incorrect. It may be necessary to click the **More Settings…** button.
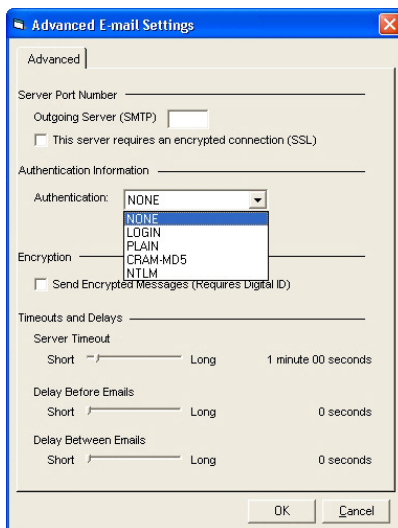
If you do not receive the **Login was successful** message, it means that one or more of your settings are incorrect. It may be necessary to click the **More Settings…** button and change one or more of the options on this screen. You may need to get the correct information from your network administrator.

In general, remember to use the same settings as those used in your main e-mail program. Now click **OK**. HealthWave is now correctly configured to send e-mails for Automatic Reporting and for patient reminders, if selected (see page 42).

Click **Next**.
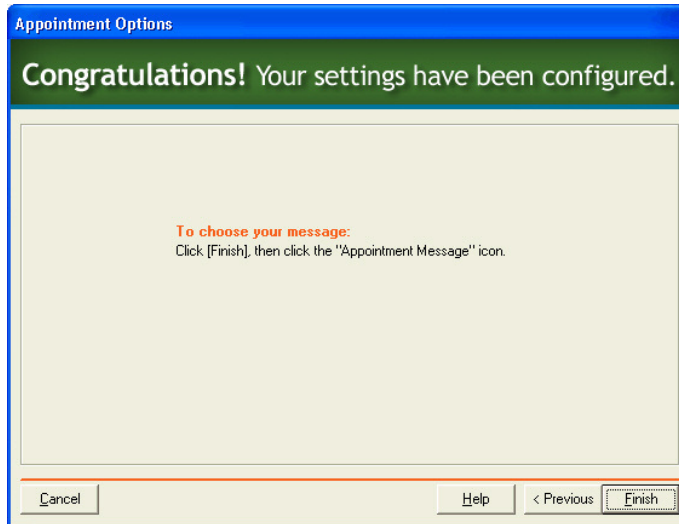
Step Nine: Confirmation

You've now finished the process of selecting your preferences, appointment file and calling options. Click **Finish**. Next, click on the **Appointment Message** icon on the **Configure** desktop to create your reminder message (see image, next page).

Step One: Launch the Appointment Message Wizard
Still on the **Configure** tab, click the **Appointment Message** icon.
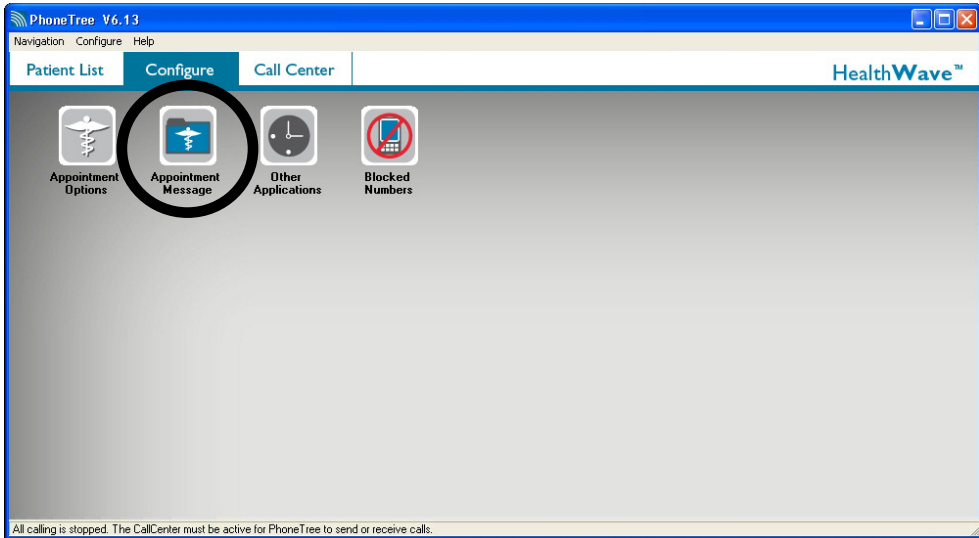
Step Two: Message Options

On this screen, use the drop-down menu to select a script template. Several choices are included and the script library is continually being updated. To see the most recent version of the script library, click the **Restore Templates** button, which will download the latest message scripts. After selecting your message, there will be a preview of the message verbiage in the **Message preview** box. If desired, you can customize this verbiage on the Message Preview screen, located at the end of the wizard (see page 55). Also, you can add additional content to your message by choosing from the seven different check boxes:

Provider inserts provider names.

Location inserts location names and phone numbers. *Only choose this option if you have multiple locations.*

Patient Name inserts the patient's first name. *The Text-To-Speech software will announce all patient names.*

Confirm Appt. will notify patients to press 1 on their touch tone phones to confirm their appointments. *Results of which patients pressed 1 will display in your automatic reports.*

Additional Instructions inserts special messages for appointment types.

Alternate Languages enables the option of scripting and recording your Appointments message in up to four alternate languages. *If this option is chosen, you cannot use Text-To-Speech for your English message.*

Call Transfer will notify patients to press 0 on their touch tone phones to be transferred to the operator if they have questions about their appointments. Enter the extension of your choice on the next screen. *Your phone system must support call transferring for this option to work.*

When you have chosen the options that best meet your needs, click the **Next** button.

Note: On the subsequent screens, you will be prompted to enter information based on the script you choose here. The screens you see will therefore vary based on your chosen script template.

Step Three: Message Options, continued

You will be prompted to enter information on this screen based on the selections you made on the previous screen. Enter your practice name here as you'd like it to appear in your message. If you have a single location, you will be prompted for your phone number on this screen. If you have multiple locations, you will be prompted to enter those on upcoming screens.

In the **Office Email** box, enter the email address where notifications should be sent when "new configuration items" are detected. These notifications occur when the data file imported contains new "items" (i.e., providers, locations and/or appointment types) not currently configured in the HealthWave software. It is important to address all new items immediately to ensure patients are getting the message details needed for their appointment.

For the **Select how your message will be spoken** option, choose either the **Female** or **Male** voice to announce patient name (if enabled) and appointment time and date in the message. Enable **Use Text-To-Speech** to have your entire message spoken by the Text-To-Speech software.

When finished, click **Next**.

Step Four: Providers/Schedules

This screen shows a list of all the providers that the HealthWave software detected after importing of your appointment file. From the list of providers, select which provider's patients you wish to receive an appointment confirmation message.

When finished, click **Next**.

Step Five: Provider Scripts

On this screen, there are three columns:

The **Provider** column denotes how each of your selected providers is identified in your Appointment report.

The **Display As** column will need to contain the provider names as you would like them to be displayed on-screen in HealthWave and on e-mailed or printed reports.

The **Script** column will need to contain the script for each provider, based on what you want to be heard in your appointment reminder message.

Therefore, you will need to edit the information for each provider in the last two columns. In this example, Provider 1 is Dr. Finley, so you would click in the **Display As** column and change "1" to "Doctor Finley." Then click in the **Script** column and change "1" to "with Doctor Finley." This will need to be repeated for each provider.

Note that if you do not wish to include the provider name in your message, just leave the script blank. The patients for the provider(s) who have a blank script will still receive an appointment reminder message. However, the provider name will not be mentioned.

When finished, click **Next**.

Configurations: Appointment Message: Locations
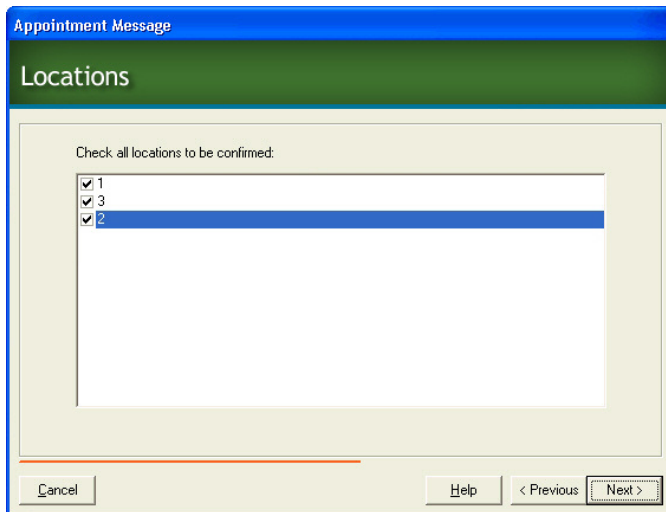
Step Six: Locations

If you chose a message script that includes multiple Locations, you will be prompted to choose which Locations will need to be included in your message. As in the Providers/Schedules step, these are all the Locations that HealthWave detected after importing your appointment file. They will all be pre-selected — if there are any you would like to exclude (in other words, if one or more of these Locations' patients should NOT receive an appointment confirmation message), be sure to deselect them in this list.
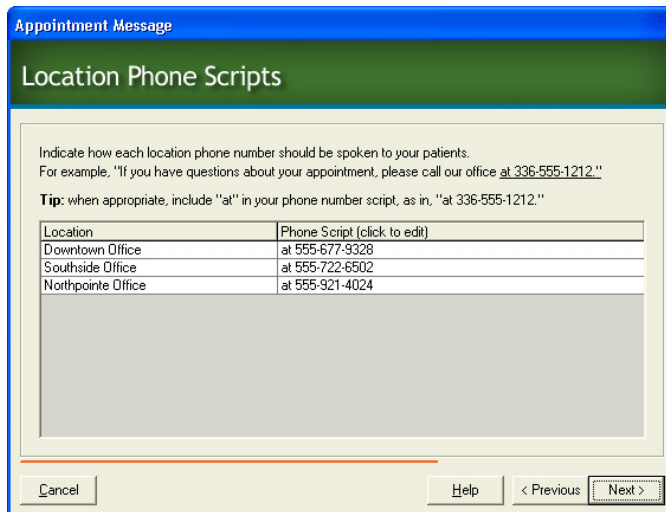
When finished, click **Next**.

Step Seven: Location Scripts

Just as with the Providers you selected for your message, here you will identify each Location both for display purposes and for your message script. In this example, we know that "1" is our Downtown Office, so we'll click in the **Display As** column and change "1" to "Downtown Office." Then click in the **Script** column and change "1" to "at our Downtown Office." This will need to be repeated for each Location.

When finished, click **Next**.

Step Eight: Location Phone Scripts

If you chose a message script with multiple locations, you will be prompted to specify the phone number for each office location. To add a corresponding phone number for each Location, click in the **Script** column and then enter it. Be sure to include the word "at" as shown. Note that if you intend to use the Text-To-Speech engine to build your messages, it will sound more realistic if you include a comma (,) before and after "at" and a period (.) at the end of each phone number (,at,555-555-1212.). Repeat for each of your Locations.

When finished, click **Next**.

Step Nine: Appointment Types
Similar to the Providers/Schedules step, these are all the Appointment Types that HealthWave detected after importing your appointment file. They will all be pre-selected — if there are any you would like to exclude (in other words, if the patients belonging to these Appointment Types should NOT receive appointment confirmation messages), be sure to deselect them in this list.

When finished, click **Next**.

Additional Instructions

Additional instructions are optional and may be given to patients based on appointment type.

To create an additional instruction click [Add], enter the category and script.

Category (click to edit)	Script (click to edit)
NEW PATIENT	Please arrive 10 to 15 minutes early to complete the necessary paperwork.
PROCEDURE	Please be sure to follow the instructions given for your scheduled procedure.
DRIVER	Please remember to arrange transportation or a driver for after your procedure.
CO-PAYMENT	Please remember that your co-payment is due at time of your appointment.
NO-SHOW	Please be aware that our office charges a fee for missed appointments.

Add   Delete

Cancel   Help   < Previous   Next >

Step Ten: Additional Instructions

You have the ability to create and assign an **additional instruction** to one or more of your selected Appointment Types. This is an optional step. For instance, if you want all the patients classified as **New Patient** to hear special instructions (such as those in our example, "Please arrive 15 minutes early to complete the necessary paperwork") but ONLY want those New Patients to hear that instruction, you can assign the New Patient instruction to your NP/New Patient Appointment Type. Here you will create any instruction(s) you might need. To add a new one, click the **Add** button, then type in the appropriate **Script**, then **Description**. If you wish to use one or more of the pre-configured message examples but wish to customize them to meet your needs, click in the appropriate column to edit the default information.

Note that each Appointment Type can have only one instruction message. Therefore, if you would like to combine one or more instruction messages, it would be necessary to create a new instruction message containing the desired information for both messages. For instance, if you want all the patients in the New Patient Appointment Type to hear *both* the New Patient **and** the Co-Payment information, you should **Add** a new additional instruction message that reads: *"Please arrive 10 to 15 minutes early to complete the necessary paperwork. Also, please remember that your co-payment is due at time of your appointment."* Then you would assign this new **additional instruction** to the New Patient Appointment Type (see page 53).

When finished, click **Next**.

Step Eleven: **Additional Instruction Selection**

As with the Providers/Schedules you selected for your message, here you will identify each Appointment Type for display purposes, then you have the option to choose an additional instruction message for that Appointment Type, if desired. In this example, NP is the New Patient Appointment Type, so you would click in the **Display As** column and change "NP" to "New

Patient." Then you would click in the **Additional Instruction** column and select the New Patient message from the drop-down box that appears. This will need to be repeated for each Appointment Type, although it is not necessary to choose an additional instruction message for all (or any) of your Appointment Types.

When finished, click **Next**.

Step Twelve: Alternate Languages

Note: If you chose **Alternate Languages** as part of your message template, this screen will appear. If you did not choose this option, please proceed to page 55.

Select the **Number of alternate languages** you want to configure and enter a name for each language in the box(es) below (configuration for these languages will take place later in the **Alternate Languages Wizard**).

When finished, click **Next**.

Step Thirteen: Message Preview

Your message is divided into several script elements which HealthWave will use to build a personal message for each patient. If you chose to record your own message (by not enabling **Use Text-To-Speech** earlier in the wizard, see page 45), you will need to record each script element (with the exception of **Name**, **time**, and **date**). If you would like to customize the preexisting message script (optional) before recording it, select the script element you wish to edit and enter your changes. Edits to any script element within **Provider**, **Location**, **Phone**, or **Reason** can *only* be made on the previous, corresponding wizard screens. The **Name, time**, and **date** script elements cannot be edited. **Note**: It is not recommended to remove the brackets from the practice name (e.g., [Greenbrook Healthcare]). Doing so may impact proper message playback.

To record a script element, select a line, and then click **Record** *(unrecorded script elements will be marked with an asterisk).* For **Provider**, **Location**, **Reason**, and **Phone**, click the drop-down menu to select and record each script element (see the example below). **Note**: When recording a script element, *be sure to click **Stop** as soon as you have finished speaking.* This prevents any null space, or dead air, from appearing in the recordings and helps the message flow. To review the script element you just recorded, click **Play**. To review the message in its entirety, click **Play Msg**. Use the **Volume** slider to control the volume of your message for playback on this screen only (changing this will have no effect on the volume of the message as heard by your patients).

If you are using **Text-To-Speech** to announce your message, click **Play Msg** to review the message. Be sure to listen for any possible pronunciation issues that may need correcting.

When you are sure each part of your message is scripted and recorded, click the **Next** button. **Note**: If you have chosen to record your message and missed a snippet, you will receive a warning: *"Your message is incomplete. Would you like to continue recording?"* Click **Yes** to continue or **No** if you wish to print a copy of your message script or to finish the recordings at a later time.

Purchasing a Studio Recording Session: For studio-quality recordings, Studio Recording Sessions are available for purchase directly from PhoneTree. For more information, please contact PhoneTree Customer Support at **800.555.0559** or **hcsupport@phonetree.com**.

Step Fourteen: Patient E-Mail

HealthWave can send e-mail reminders to patients (if the patient e-mail was imported along with the other information in the daily appointment report) in addition to calling them, with or without an attachment for use in electronic calendar format (Outlook, iCal, Blackberry, etc.). To enable an e-mail reminder, check the box next to **Send e-mail appointment reminders to patients**. You may also choose to **Include a calendar reminder** if desired. Next **select an e-mail style** and click the **Preview** button to see what the e-mail reminder message will look like.

Then enter the **Subject** of the e-mail under **Enter E-Mail details**. For **Office phone #**, choose **Same for all patients** and enter the desired phone number or **Varies by location** for more than one location (the phone for each location will be obtained from the script information you enter on page 50). Click **Configure E-Mail** if you didn't already during the Automatic Report setup process.

Click **Next**.
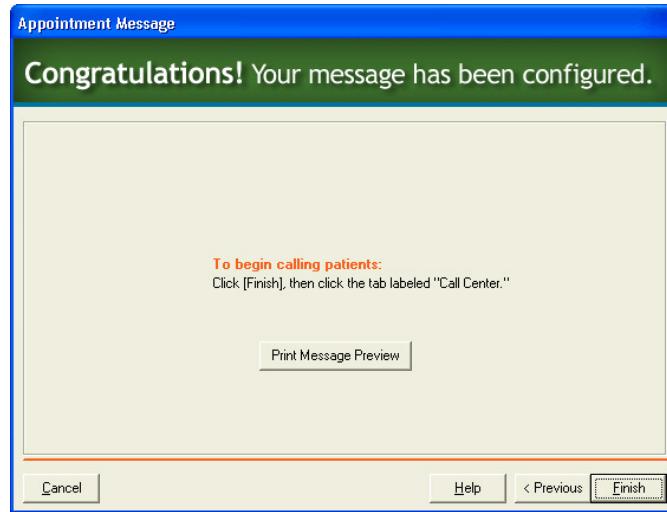
Step Fifteen: Confirmation

You've now successfully configured your appointment message. If you would like to print a copy of your message script, click **Print Message Preview** (from the screen that appears, click **File ▸ Print**).

Note regarding the Alternate Language Message: If you selected **Alternate Languages** as part of your message template, your confirmation screen will instruct you to "**click the Alternate Language icon**" instead. See page 59 for instructions on configuring alternate languages as part of your Appointment Message.

Note regarding Other Applications: If you would like to configure HealthWave to use additional applications such as Recalls, Collections, etc., please see page 65.

To begin calling patients, click **Finish**, then click the tab labeled **Call Center**.

Notes
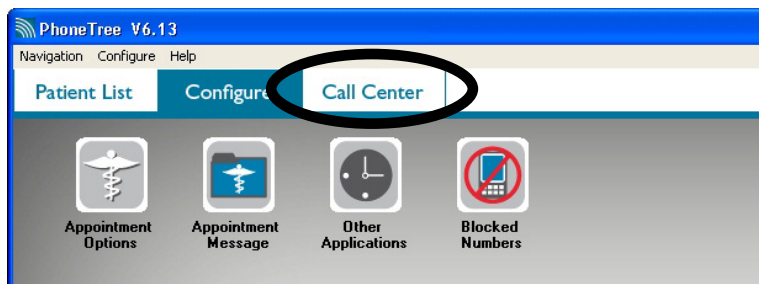
Configurations:

Alternate Languages

Configurations: Launch the Alternate Languages Wizard
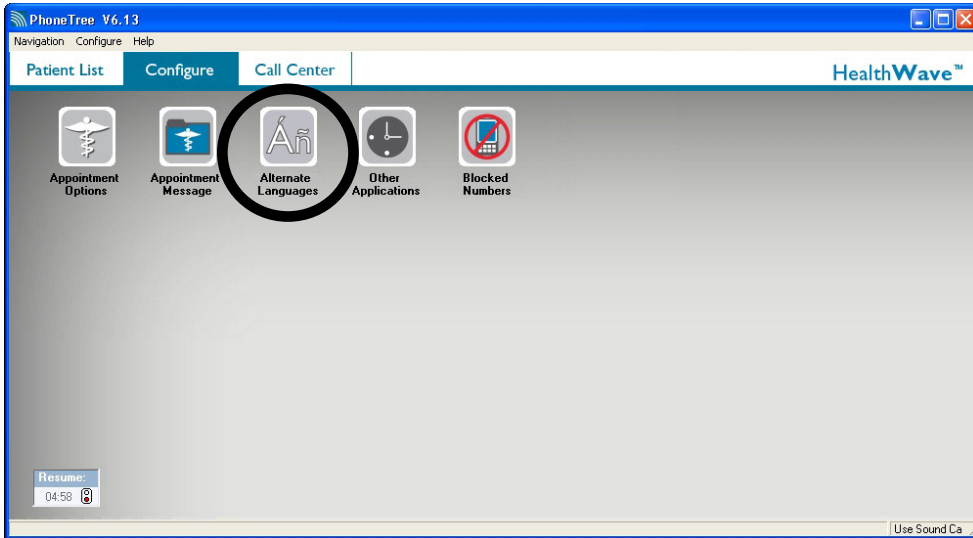
Step One: Launch the Alternate Languages Wizard

This Alternate Language icon appears if you chose the **Alternate Languages** option on the first **Message Options** screen. Unlike the English Appointments message, Alternate Languages does not have an option for Text-To-Speech and requires you to record your own messages. To begin configuring the Alternate Languages messages, click this icon.

Message Configuration

Language Selection

Choose the alternate language to be configured.

Select a Language: Spanish

Cancel   Help   < Previous   Next >

Step Two: **Language Selection**

From the **Select a Language** drop-down box, choose which language to record.

Click **Next**.

Step Three: Message Options

On this screen, you will notice that the **Practice name** and **Office phone number** fields (only appears if you have only one Location) are grayed out. That information is being used from the English appointments message.

Unlike the appointments message, Alternate Languages does not have an option for Text-To-Speech and requires you to record your own messages. Click the **Voice for date and time** drop-down box and select the prerecorded **Tds** (time-date stamp) that matches the language you are about to record.

Click **Next**.

Step Four: Message Preview

Although the message script appears in English, you will need to translate and record what you see for the language you selected. Each script element requires its own individual recording (with the exception of **Name**, **time**, and **date**). To record a script element, select a line, and then click **Record** *(unrecorded script elements will be marked with an asterisk)*. For **Provider**, **Location**, **Reason**, and **Phone**, click the drop-down menu to select and record each script element (see the example below). **Note:** When recording a script element, *be sure to click **Stop** as soon as you have finished speaking.* This prevents any null space, or dead air, from appearing in the recordings and helps the message flow.

To review the script element you just recorded, click **Play**. To review the message in its entirety, click **Play Msg**. Use the **Volume** slider to control the volume of your message for playback on this screen only (changing this will have no effect on the volume of the message as heard by your patients).

When each part of your message has been recorded, click **Next**.

Purchasing a Studio Recording Session: For studio-quality recordings, Studio Recording Sessions are available for purchase directly from PhoneTree. For more information, please contact PhoneTree Customer Support at **800.555.0559** or **hcsupport@phonetree.com**.
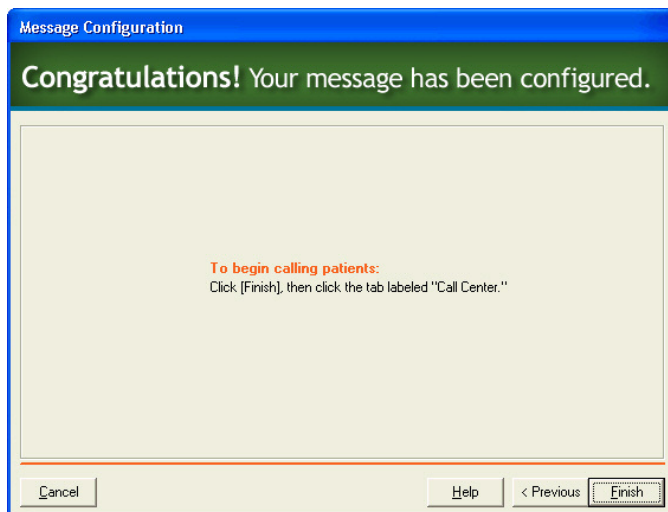
Step Five: Confirmation

You've now successfully recorded your Alternate Languages appointment message. To begin calling patients, click **Finish**, then click the tab labeled **Call Center**.

Note regarding Other Applications: If you would like to configure HealthWave to use additional applications such as Recalls, Collections, etc., please see page 65.

Configurations:

Other Applications

Configurations: Launch the Other Applications Wizard
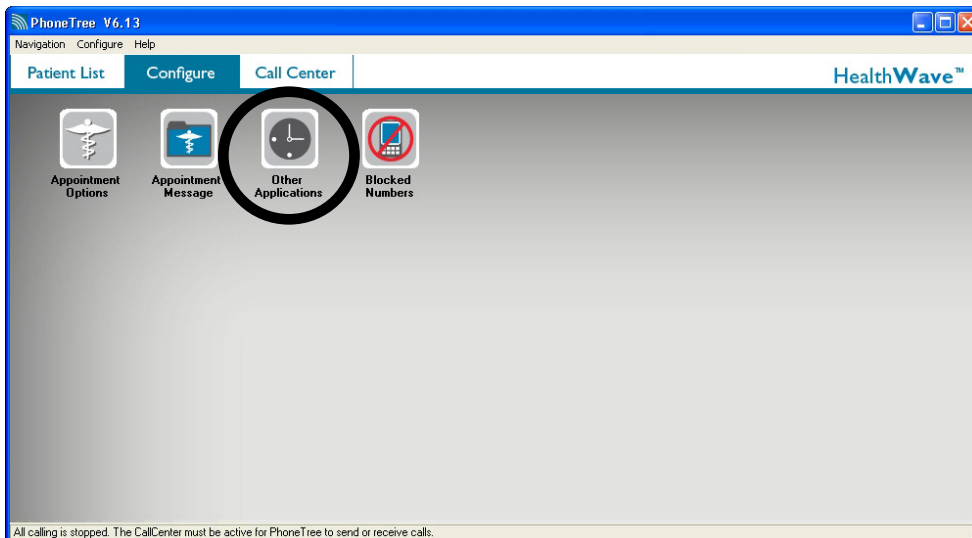
Step One: Launch the Other Applications Wizard

In addition to making Appointment reminder calls, you can also set HealthWave to call for other applications such as Recalls, Reschedules or Collections. If you would like to create an additional application, click the **Other Applications** icon.

Note: *Unlike the Appointments message, the other applications do NOT have the ability to include separate providers, locations, reasons, or appointment dates and times in the message, but instead deliver the same message to each patient.* Be sure that your practice management software (PMS) has the ability to create a file that only contains patients under that specific category. For example, to setup an application for Recalls, you would need to generate a file from your PMS that ONLY contains patients listed as Recall.

The file format you will use for any other application must be in one of two different file formats: **CSV** or **the same format of your Appointments file**. To help keep your set up simple, it is recommended that you save your other file(s) in the same location as your appointment file(s).

Step Two: Application Configuration

First you must create an application. Choose **Add Application** and then in the **Application** field, enter a name for the application (Recalls, Collections, Birthdays, etc.). To create another application, repeat this process. To make changes to an existing application, choose **Edit Application** and then select the application from the **Application** drop-down box. *Only one application can be added or edited at a time.* To rename an application, select a preexisting application from the drop-down menu, then click **Rename**. Enter the new name of the application in the box provided, then click **OK**.

When finished, click **Next**.

Step Three: Your File

On this screen, select either **One report file** (if you only exported one file from your PMS) or **Multiple report file** (if your PMS requires you to export more than one file to capture all relevant patients).

Then click **Browse…** and navigate to same location where you saved your appointment file(s). Once you have chosen the path to your file, the pathname will appear to the left of the **Browse…** button. **Note that HealthWave will not be able to initiate calls for this application unless your file is saved in the location and with the name you specify here.**

Choose which translator meets your file format from the **Select a translator** box. Your two choices are **CSV** (CSV format) or the name of the same translator used for your appointment file.

Now, choose one of the two options under **Select when PhoneTree will import your file**:

a) **Wait for the above file to be created each day** (Recommended) We suggest this option, because as soon as your daily report appears in the above location, HealthWave will automatically read the file and use it to start calls during your desired calling window. Note that this choice is not available for the **Multiple File Operation** option.

b) **I will start my calls manually each day**. If you select this option, the Task Desktop will appear (between the Patient List and Configure tabs) and you would need to click the Task icon to start calls for this application. As in the previous choice, if the above file is not in the above location when the icon is clicked, HealthWave will not be able to start calls.
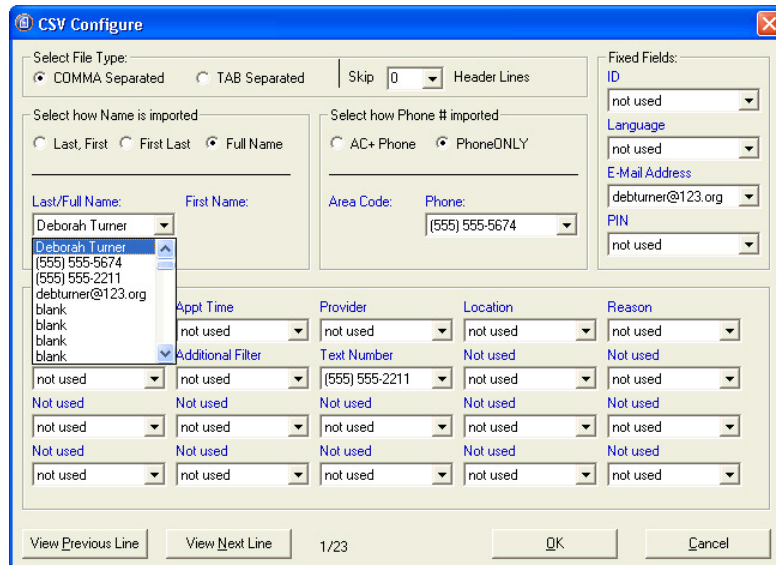
Click **Next**.

Step Four: Configure CSV File

If you chose **CSV** as your translator, this screen will appear. Click the **Configure** button. **Note**: If you chose the same translator you used for your appointment file, continue to page 70.
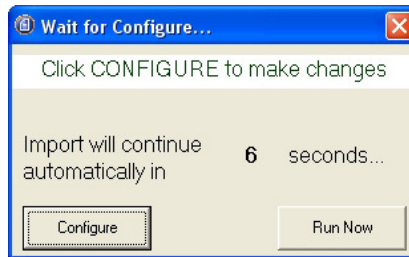
This next screen is the **CSV Configure** dialog, used to tell HealthWave where each piece of data belongs. Because the application plays the same message for each patient, the only fields on the file that must be imported are Name and Phone. First, import patient names.

Under the section **Select how Name is imported**, choose the format for how the patient's name appears on the file. An easy way to find this out is to use the drop-down box for **Last/Full name**. If you see the last name and first name as separate choices, then choose either **Last**, **First** or **First Last** (depending on what order you prefer it to appear on your report). If the patient's first and last name are on one line, be sure to choose **Full Name**. After choosing the correct name format, place the last and first names in the appropriate boxes. Next, choose how the phone number appears on the file. From the **Phone** box, locate the phone number. If the area code appears on a line separate from the seven digit phone number, choose **AC+Phone**. If the area code and the phone number appear on the same line, choose **PhoneONLY**. Next, select the phone number in the drop-down box and then click **OK**.

Configurations: Other Applications: Import Results

Step Five: Import Results

After your file has finished importing, by either the CSV or same translator you used for your appointment file, you will be shown this screen. Check the **Name** and **Phone** columns to make sure the data from your PMS file was imported correctly.

If the data did not import correctly, follow the instructions located on this screen.

If the imported data looks correct, click **Next**.
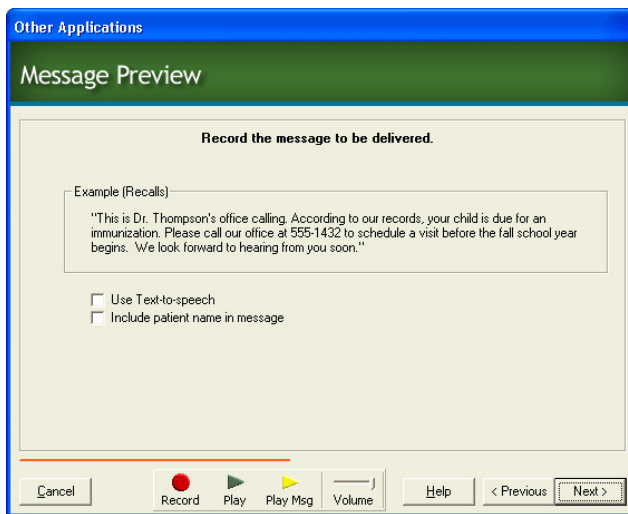
Step Six: Message Preview

This screen shows a basic example of how you should script your messages. While this example is for Recalls, you should to use whatever works best for your practice and the application(s) you choose. There are two options to announce the message:

Text-To-Speech Messages

If you would like the Text-To-Speech software to announce the message, check the **Use Text-to-speech** box and choose the **Female** or **Male** voice. Enter your message script in the field that appears and click **Play** to review. The **Volume** control only changes the level of playback in your headphones and does not affect how loud the message is played to the patient during a phone call.

To include the patient's name in the message, enable the **Include patient name in message** box and double-click on each of the top and bottom text boxes to enter your message (the first field should have verbiage that allows the patient's name to be inserted, with the remaining part of the message continuing in the next field.). **Note:** You cannot edit the middle box since this is where HealthWave will insert the patient's first name, as read from your data file.

Recorded Messages

To record a message, click **Record**. To review your recording, click **Play**. The **Volume** control only changes the level of playback in your headphones and does not affect how loud the message is played to the patient during a phone call.

To include the patient's name in the message, enable the **Include patient name in message** box and choose the **Female** or **Male** voice. Next, single-click to highlight the item you want to record and then click the **Record** button; repeat for each (double-click each if you would like to enter message text for future reference). To review your recording, press **Play**. To hear the entire message as it will play to a patient, click **Play Msg**. **Note:** You cannot edit the middle box since this is where HealthWave will insert the patient's first name, as read from your data file.

Purchasing a Studio Recording Session: For studio-quality recordings, Studio Recording Sessions are available for purchase directly from PhoneTree. For more information, please contact PhoneTree Customer Support at **800.555.0559** or **hcsupport@phonetree.com**.

When finished, click **Next**.

Step Seven: Call Delivery Options

Here, you will be able to specify how you want HealthWave to handle multiple appointments in your practice management data file, when to start and stop calling, and more.

Choose **Simple** if you wish to specify the same call window for each day and to keep the other settings at their defaults.

Choose **Advanced** if you want the call window to vary from day to day and/or you want control over other HealthWave calling options.

Choose an option and then click **Configure options**....

Transfer will notify patients to press '0' on their touch tone phones to be transferred to the operator if they have questions about their reminder. To use this feature, enable **Use Transfer** and enter the extension of your choice in the box provided. *Your phone system must support call transferring for this option to work.*
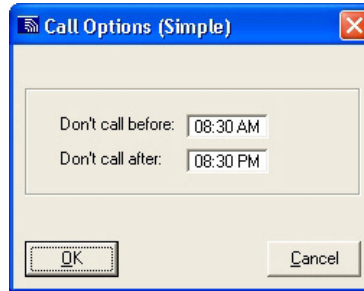
Simple Method

On this Simple Call Options screen, enter your desired **Don't call before** and **Don't call after** times, then click **OK**. Remember that HealthWave uses your PC's system clock when determining time, so be sure that the PC's clock is always set correctly.
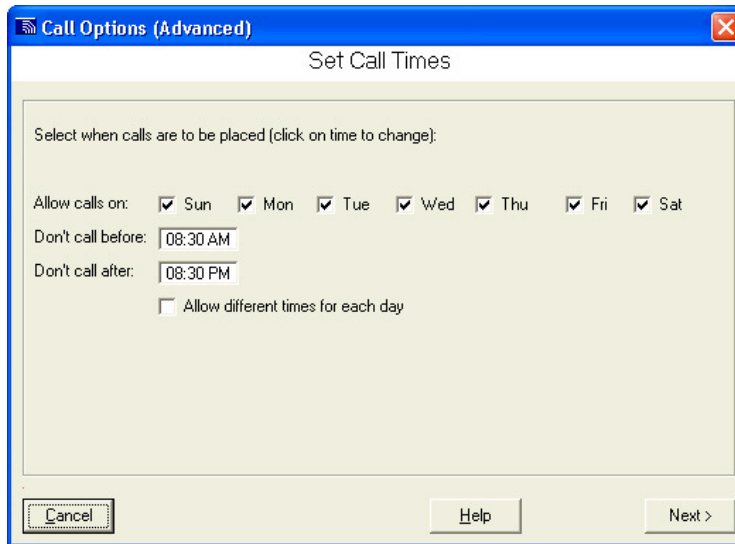
Advanced Method

On this first screen, choose the call times desired. These can vary from day to day if the box next to **Allow different times for each day** is checked. You may also de-select certain days, if you know you would not like to call on one or more days (for instance, the weekend). Note that you are setting the call window for these days, however based on the selections you made under **Select when PhoneTree will Import your file** (see page 68), calls may not begin until your daily appointment report appears. Click **Next**.
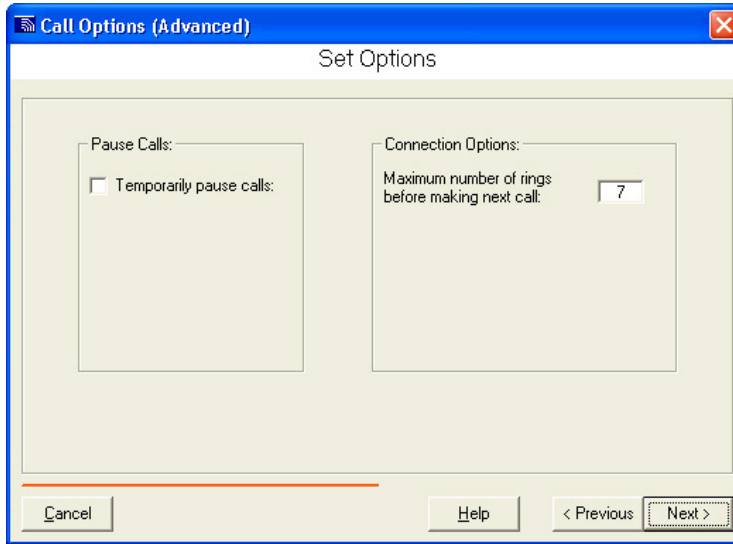
With the options on this screen, you have the ability to change several things:

a) **Pause Calls**: Temporarily pause calls during a time you specify (often used to pause calls during the dinner hour) if selected. Enter your desired **Pause** and **Resume** call times in the boxes provided.

b) **Connection Options**: We recommend you leave these set to their defaults, however you might want to change these to handle certain situations. For instance, to move through a list of patients quicker, you could reduce the **Max number of rings before moving on to next call** from 7 to a lower number (keeping in mind that many answering machines pick up after the fourth ring).

When finished making changes to these settings, click the **Next** button.

Here, you can set HealthWave to leave your message on a patient's answering machine, how often to retry a busy or unanswered phone number and how to handle multiple and family entries:

a) **Answering Machines**: Select on which attempt you want HealthWave to leave a message on an answering machine. Choose from **On first attempt**, **On second attempt** or **On third attempt**.

b) **Busy/No Answer**: Select the number of retries HealthWave makes to a busy or unanswered phone number. Once all retries have been exhausted, no further attempts will be made to that phone number for that call job. Choose from **3**-**8** retries.

c) **Multiple Entries**: If a single patient has more than one entry on a file, you can select how HealthWave will handle this. Choose from **Call only once per person** or **Call for each list entry**.

d) **Family Entries**: If there is more than one patient at the same phone number appearing on a file, choose either to **Call each patient separately** or **Combine family entries into one call**. Note also that the **Include patient name in message** option must be selected on the **Message Preview** screen (see page 71) of the Other Applications wizard.

When finished making changes to these settings, click the **Finish** button.

Now that you are finished with the Call Options, click **Next**.

Step Eight: Automatic Reports

HealthWave can automatically send a final call status report via e-mail to your printer and/or to a file on your PC's hard drive. To enable this feature, select **Custom Report**, then click **Configure Report**.

Enter your practice's name in the **Practice name to appear...** box. Next, choose how you would like to receive your Automatic Reports:

E-mail: Select **E-mail a call status report**. Then, enter the appropriate information in the **To** and **Subject** boxes (you can send this report to multiple addresses by separating them with a comma in the **To** box). Then click **Configure E-Mail** (see pages 40-41 for configuration instructions).

Print: Select **Print a call status report**. From the drop-down box, choose from the printers you have installed on your PC or network.

File: Select **Write a call status report to a file**. Click **Browse** and choose a folder on your PC or network to save your reports in as they are created. Then, choose the format(s) you want your reports saved as by selecting **CSV**, **PDF**, or both. **Note:** At least one format must be selected.

To sort your reports by a certain field, choose up to three different fields and the order to be arranged in under **Sort Order**.

Click **OK**, then click **Next**.

Step Nine: Patient E-Mail

HealthWave can send e-mail reminders to patients (if the patient e-mail was imported along with the other information in the daily appointment report) in addition to calling them. To enable an e-mail reminder, check the box next to **Send e-mails to patients**. Next **select an e-mail style** and click the **Preview** button to see what the e-mail reminder message will look like.

Enter the **Subject** of the e-mail under **Enter E-Mail details**. Enter the office's phone number in the **Office phone** box (this will appear in your e-mail to patients). Click the **Configure E-Mail** button if you didn't during the Automatic Report setup process.

When you are finished, click **Next**.
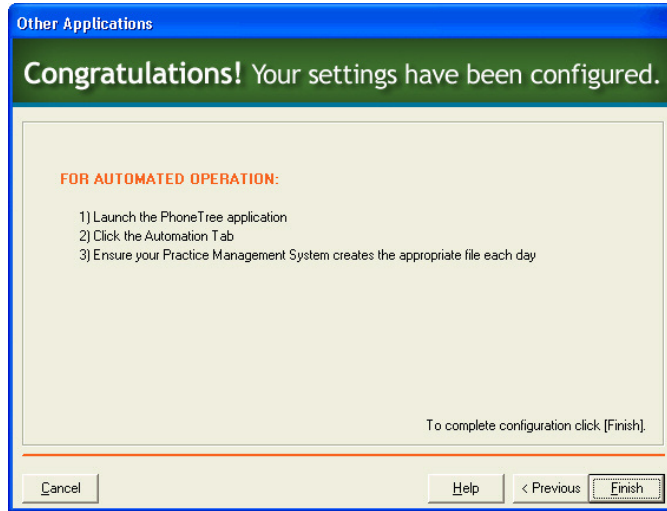
Step Ten: **Confirmation**

Once you have finished configuring your application, you will see this screen. To launch the application, click **Finish** and then click the **Call Center** tab. Remember, if you want to create more than one application, just click on the **Other Applications** icon again and repeat the process.

Notes

Configurations:

Blocked Numbers

Configurations: Blocked Numbers
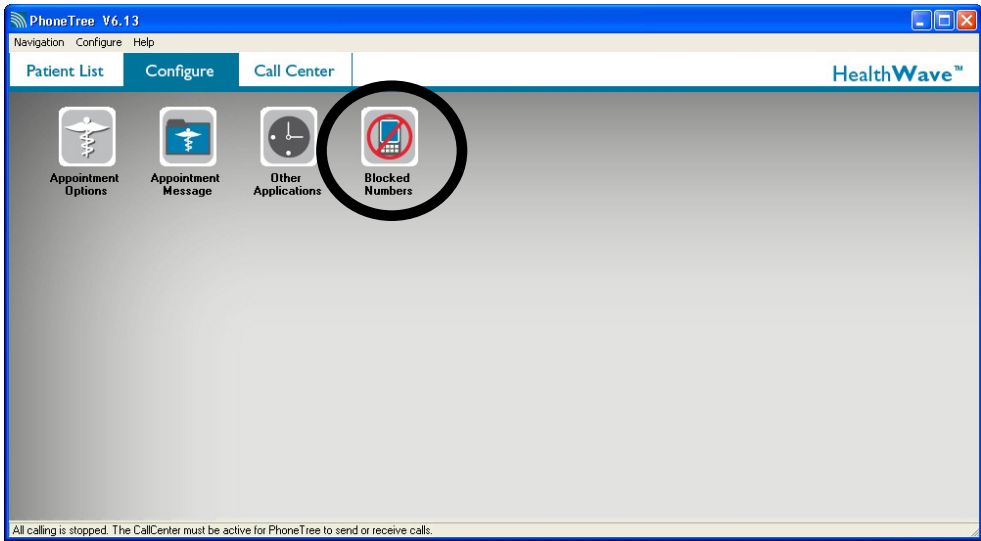
Blocking Phone Numbers

The **Blocked Phone Numbers** utility is available to make sure that certain people never get called by HealthWave. Click the icon to display the following screen:

Enter their **Phone** numbers (required) and **Names** (optional) as they appear in your list (type in the blank next to the asterisk), and type **Comments** if desired. Click the close box when done. HealthWave *will not* call any phone number that you enter on this screen.

Daily Operation

Daily Operation: Ensuring Automatic Operation

If you followed the Configuration Steps (and chose option A or B on page 24), you configured your system to automatically import your practice management data file each day and start calls based on that file. In order for this automation to work, all of the following conditions must be met each day:

1) The PhoneTree hardware *must* be on and connected (see page 10)

2) Working analog phone line(s) *must* be connected to the PhoneTree hardware (see page 11)

3) The HealthWave computer *must* be on

4) The HealthWave software *must* be running

5) The HealthWave software *must* be left in the **Call Center** screen (see below)

6) Your practice management data file *must* be present each day in the location you specified on pages 24 and 68 (if using Other Applications).

Suggestions for ensuring that HealthWave makes your calls each day would be to connect the PhoneTree hardware and the HealthWave computer to a reliable surge suppressor or other power management device (which would make a power failure less likely), then to save or export your data file from your practice management system (PMS) each morning (or have your PMS configured to automatically do this). If conditions 1-6 above are met, HealthWave will start calling your patients automatically.
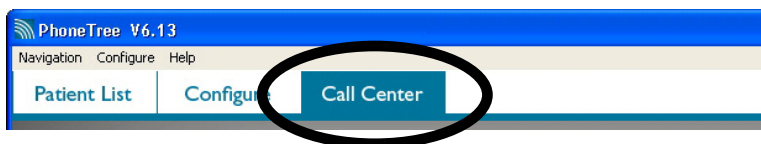
To put HealthWave in the Call Center, click the **Call Center** tab. The Call Center will then launch, and you can monitor your calls in progress.

The AutoResume Timer
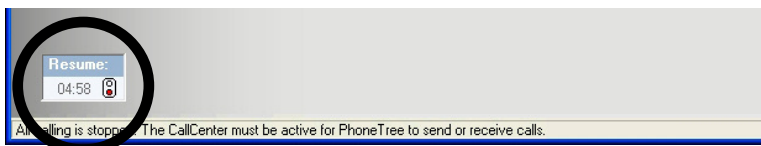
Appearing on each desktop of the HealthWave software is the **Auto Resume Timer**, which will automatically resume calls for you after the time elapsed on its counter (each time you exit the Call Center screen, the timer is reset to 5 minutes). So, when the counter reaches 00:00, the software will return to the Call Center mode and if a call job is in progress, then calls will resume. This is a built-in safeguard so that your patient calls will be made, even if you forget to leave the software in the Call Center screen.

If you want to suspend the Auto Resume Timer temporarily, click the 'stoplight' icon to turn it from green to red. To reactivate it, click the 'stoplight' icon again to turn it from red to green.

Click here to activate or deactivate.
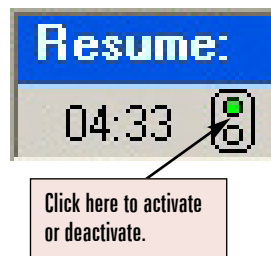
Making Calls

This is the HealthWave **Call Center**. This is the *only* screen where it is possible for HealthWave to make calls. While in the Call Center, you can monitor call job activity from one of two different views (**Automation** and **Lines**) and control other functions.

Automation View
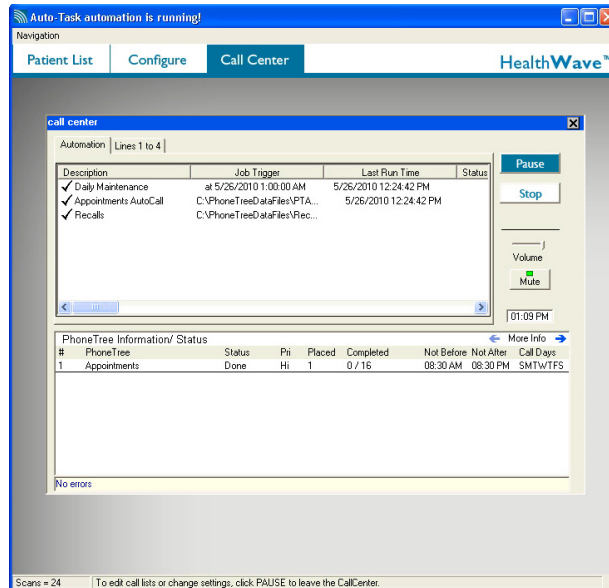
Automation view:

Here, you can monitor when each application will run:

Job Trigger: Displayed here will be the path and file name information for each application and the scheduled time and date that Daily Maintenance will run next. Each of these were programmed when you completed the Appointments Options and/or Other Applications wizards. In order for each application to run, you **must** save your data file in this specific location while using the correct file name *every* time.

Last Run Time: Each time you create a practice management data file for an application and save it in the proper location, the application will run. Once this happens, HealthWave will record the date and time this took place.

Status Message: If a problem was encountered when HealthWave tried to run an application, HealthWave will display an error message here. If you receive a message that you do not understand, please contact PhoneTree Customer Support for assistance. If an application ran as intended, no message will be displayed here.
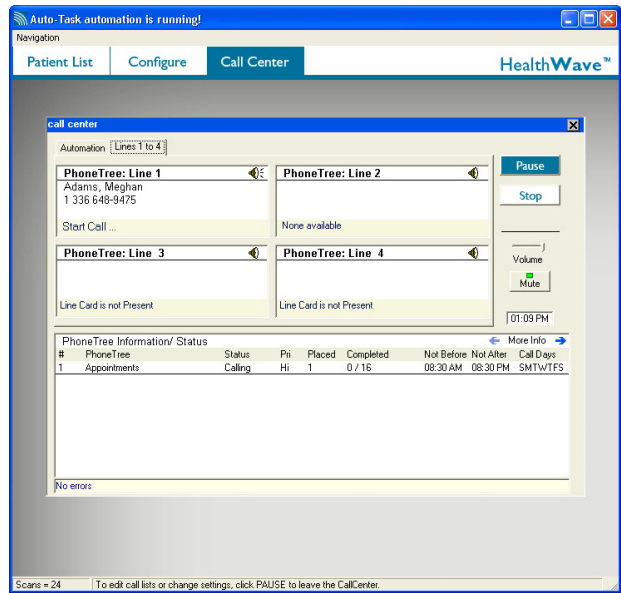
Lines View

Lines view:

Here, you can see each call in progress:

Line Boxes: Each box shows the status of an installed phone line (four at a time, per tab). The contents of each box change as calls progress. Click the **Speaker** icon in the top right of any box to monitor calls for that line.

Call Center Controls:

a. **Volume Control Slider**: Use to adjust the volume (which allows you to monitor the calls in progress). Click the **Mute** button if you do not want to hear calls in progress at all.

b. **Pause Button**: Use to stop calling. In-progress calls are finished before returning to the Main Menu. You can return here to finish the call job later by clicking the **Resume Call Center** icon.

c. **Stop Button**: Use to stop calling immediately. In-progress calls are interrupted and you will be taken back to the Main Menu. You can return here to finish the call job later by clicking the **Resume Call Center** icon.

d. **PhoneTree Information/Status Window**: Provides summary information about the calling session in progress. Click on the More Info Arrows to see additional summary information.

Any time you wish to leave the Call Center (to make changes to your configuration, manually print a call status report, or other non-calling activity), click **Pause** (waits for current call or calls to complete) or **Stop** (stops calling immediately, even if one or more calls are in progress). Then click **Yes** on the following message box:
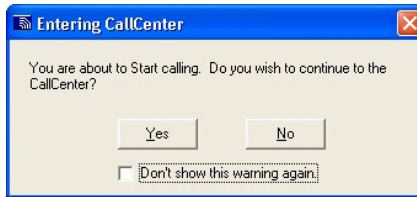
…then click on the desired tab to access other settings. ***Keep in mind that HealthWave will only be making calls if the software is in the Call Center***. Therefore, if HealthWave is displaying any other screen, calls will ***not*** be going out.

Understanding Call Statuses

Once a call job is complete, HealthWave will generate an automatic report — via e-mail, printer or both — with your call results.
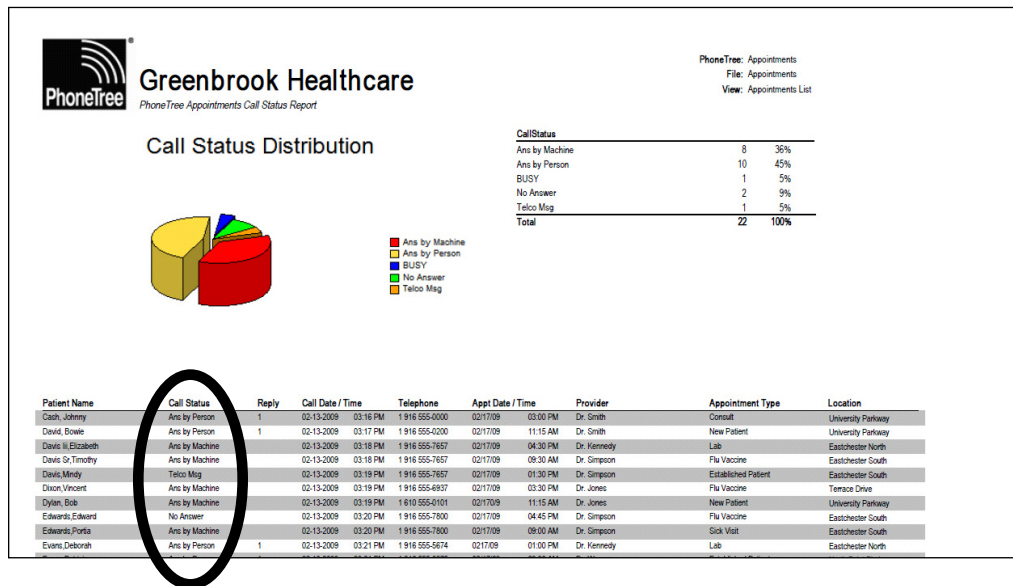
Here, we have a sample report with the call statuses circled. Your report may differ slightly depending on which one was chosen during your initial configuration. Below you will find a list of all the possible list of call statuses that HealthWave can give, plus their definitions. Be sure to keep this list in a handy location to help understand the call statuses you receive on your reports.

Completed Call Statuses

Ans by Person	Message was delivered to a person
Ans by Machine	Message was delivered to a person's voicemail/answering machine
Ans by +Machine	Message was delivered to a person's voicemail/answering machine
Call Transferred	Person was transferred to a preset extension after pressing "0"
EMailed only	Email message was sent, no call was placed

Incomplete Call Statuses (HealthWave will re-call)

BUSY — Busy signal detected on last call attempt

Not Called Yet — Person has not been called yet

Learned Machine — A unique voicemail/answering machine greeting was analyzed and will be retried

No Answer — No answer on last call attempt

Final Call Statuses (HealthWave will not re-call)

Hung up early — Call was answered, but responder hung up before message finished

BUSY after Voice — Problem completing call, check for possible issue with phone number

Max No Answers — No answer and/or busy signal detected for all call attempts (up to 8)

Not Selected Statuses (HealthWave will not attempt to call)

Removed as Dup* — Person's name and/or number appears on the call list more than once
*If Combined Family calling is enabled, all persons with the same phone number will have their
individual name and appointment information announced within the same call.

Blocked Number — Person is on the HealthWave Blocked Numbers list

Error Call Statuses (please check the phone number

Call Failed! — Problem completing call, check for possible issue with phone number

OGM too long — Voicemail/answering machine greeting was too long, message not delivered

Telco Msg — Problem completing call, check for possible issue with phone number

No Connect — Problem completing call, check for possible issue with phone number

Fax or Modem — Call was answered by a FAX machine or modem

Bad Name/Phone — Person's name and/or phone number is missing or incomplete

Troubleshooting

New Configuration Items Message

Q. I keep seeing a message that says "New configuration items have been detected." What does this mean and what should I do?

A. If you configured your system for automation (following the guidelines on page 84) HealthWave will import your file each day and build messages based on the choices you made in the two configuration wizards on the Configure tab.
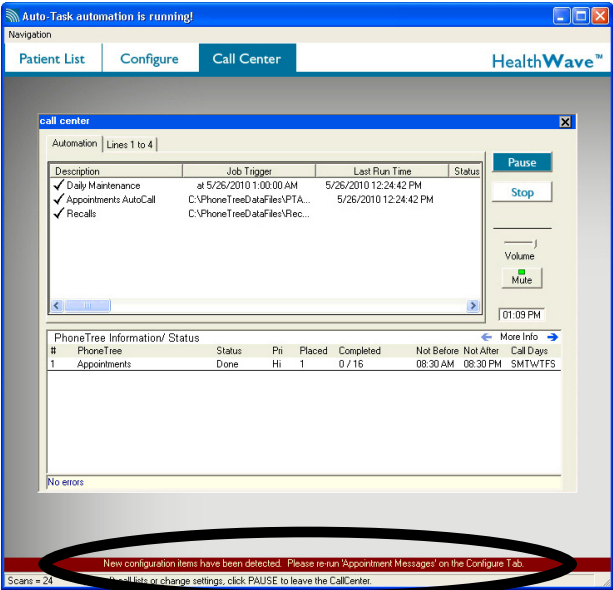
If HealthWave detects new providers, locations and/or appointment types in your file after import, a message will appear in the Call Center screen like the one shown above saying "**New configuration items have been detected. Please re-run 'Appointment Message' on the Configure tab.**" This is your cue that a new provider, location or appointment type is being imported along with the other data in your file, but HealthWave needs to know how to identify and handle the new item(s). Therefore, you will need to temporarily Pause calls, return to the **Configure** tab and click on the **Appointment Message** icon. Then follow the same steps you did for your original configuration (starting on page 43) until you have configured the new item(s) that were detected in your report.

It is recommended that you check your Call Center for this message on a daily basis. If ignored, calls to some patients will be missing the provider, location and/or appointment type details they might need for their appointment.

File Importing

Q. I imported my file and now I see data other than our patient names in the "Patient's Name" column. Why did this happen and how can I correct it?

A. The translators built in the HealthWave software are created for specific file formats. For example, if you choose the CSV translator, then the file **must** contain the proper CSV format for HealthWave to read it correctly. This means that all the fields in that CSV file must stay in the proper order and be consistent throughout. This also holds true for **any** PMS brand translator.
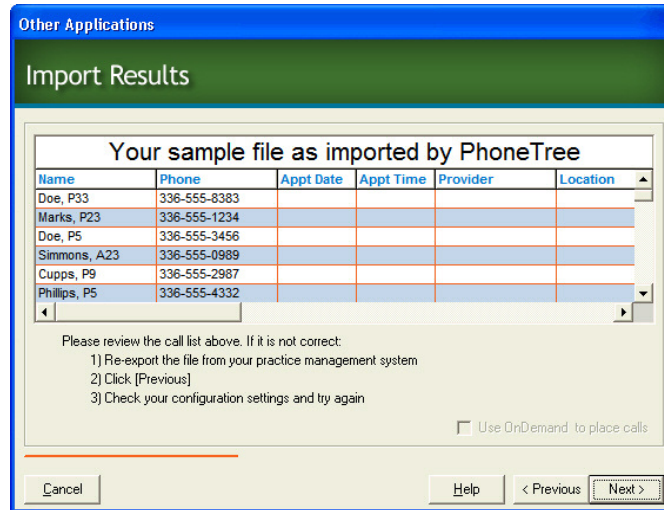
To remedy the problem, recreate the file and double check the file's format by opening it with Notepad. It will be easy to check a CSV file format but a PMS file format might be more difficult to understand. If the file's data looks correct, try importing it again and check your results. If you still have an issue with importing the file correctly, please give PhoneTree Customer Support department a call.
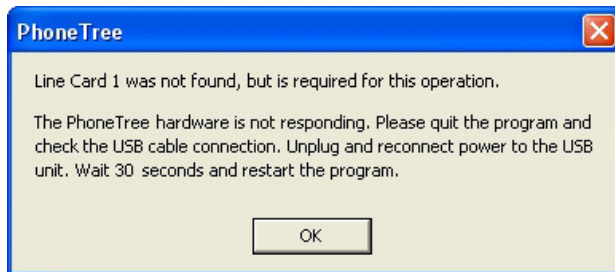
Line Card Not Found

Q. I keep getting an error message that says "Line Card Not Found."

A. This error always means that the HealthWave software is having trouble recognizing the PhoneTree hardware. This common problem of the PC not recognizing a USB peripheral can occur with any USB device, not just HealthWave. To resolve this, try the following steps in order:

Cause: Power Management is enabled under Windows XP, Windows Vista, Windows 7 AND/OR the computer is set to hibernate.

Remedy: To manage power, Windows XP, Windows Vista or Windows 7 will attempt to disable USB when a device is not used. As the default behavior, this often does not work properly and may cause Windows to not properly recognize a USB device (including PhoneTree). Fix this problem by following the instructions on pages 14-17, then:

1. Disconnect the power cable from the PhoneTree unit, wait 20 seconds, then reconnect the power cable.

2. WAIT for Windows to recognize your new hardware and load the drivers. This step may take several minutes.

Cause: The PhoneTree unit is not receiving power.

Remedy: Confirm that the PhoneTree power adapter is plugged into the power adapter jack on the back of the unit, and that the other end is plugged into an operational wall outlet. The green power indicator light on the front of the unit will be on.

Cause: Electrical glitch, upgrade of HealthWave or Windows software, installing any new Windows program, or any other Windows anomaly.

Remedy: Reboot the PhoneTree USB unit (Disconnect the black power cable for 15 seconds) then reboot your PC (start ▶ shutdown ▶ restart). Reconnect the black power cable directly after you choose restart.

Cause: Starting HealthWave software before Windows finishes booting.

Remedy: Whenever restarting your PC, be sure all boot activity has completed prior to starting the HealthWave software. Be sure your mouse pointer is NOT showing the "hourglass" for at least 10 seconds prior to starting the HealthWave program.

Cause: PhoneTree's USB cable is not properly connected or is faulty.

Remedy:

1. Confirm that the PhoneTree USB cable is firmly plugged into both the USB port on the back of the PhoneTree unit (**please note**: this cable should not be forced to sit flush with the USB port on the unit), and the other end is plugged into an available USB port on the back (or front) of your PC.

2. Unplug the PhoneTree USB cable from the back (or front) of your computer and try plugging it into a different USB port.

3. Replace the PhoneTree USB cable with a different USB cable.

4. Connect a different USB device to the same USB port on your PC and check to see if the device is recognized in the Windows Device Manager (see page 14).

Cause: Improperly installed PhoneTree USB driver software.

Remedy: Uninstall the HealthWave software using the Control Panel "Add/Remove Software" dialogue. Then reinstall HealthWave software from the original disk. **Note**: Any calling lists and settings will be retained and will not be affected by this procedure.

Cause: Improperly installed or corrupted PhoneTree USB driver software

Remedy: Disconnect your PhoneTree's USB cable from the PC and the PhoneTree power adapter. Then remove your USB root hub by right-clicking on the "My Computer" icon, selecting the Device Manager under Hardware, then right-clicking on "USB Root Hub" under "Universal Serial Bus controllers" and choosing "Uninstall" from the pop-up menu. Restart your PC, then reconnect the PhoneTree power adapter and the USB cable to the PC.

If you have tried all these suggestions and you are still receiving the error, please contact PhoneTree Customer Support at **800.555.0559** or **hcsupport@phonetree.com**.

Q. *I connected the USB cable before installing the HealthWave software. I've got the software installed now. How should I fix this?*

A. Follow these steps in order:

1. Open the Device Manager (see page 14) and remove the unrecognized devices (designated by exclamation points) by right-clicking on them, then choose Uninstall from the drop-down menu. Repeat for each unrecognized device.

2. Unplug the PhoneTree power adapter.

3. Reconnect the PhoneTree power adapter.

4. Wait as Windows recognizes your new hardware and loads the drivers. This step may take several minutes.
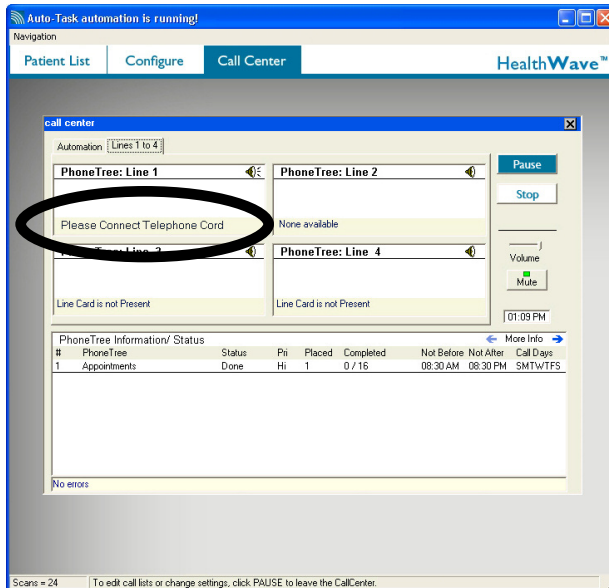
Please Connect Telephone Cord

Q. I keep getting a message that says Please Connect Telephone Cord. How can I fix this?

A. This error message means that the HealthWave software is not recognizing an operational and correctly connected analog phone line, and therefore cannot make calls. There are several reasons why you might experience this. After exiting from the HealthWave software, try the following steps in order:

1. **Connect a Standard (Analog) Telephone**

   Disconnect the PhoneTree phone line from the wall outlet. Connect a known working analog telephone to this wall outlet, using the phone cable provided with the HealthWave system.

   If the connector does not fit, contact your telephone provider to obtain the correct wall connector for your line.

   Note: HealthWave requires a standard analog telephone line or an analog extension on a digital phone system.

2. **Verify Dial Tone**

   Lift the receiver and listen. If you hear a dial tone, proceed with the next step. If no dial tone is heard:

   Try a different phone cable instead of the one provided with PhoneTree. If you hear a dial tone with the new cable, proceed with the next step (and continue to use the working phone cable). If no dial tone is heard with the new cable, contact your telephone provider and ask for the problem to be corrected.
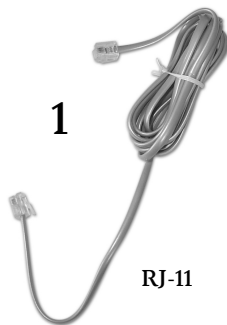
3. **Repeat For All Purchased Phone Lines**

   If you have a multi-line system, repeat steps 1 and 2 for all installed phone lines. Note that for each line installed, you will need to have an analog phone line installed by the phone company for HealthWave to use in making calls.

4. **Disconnect**, **then Reconnect the PhoneTree Power Cord**

   Disconnect the black power cable from the back of the PhoneTree unit. Wait a few seconds, then reconnect the cable, confirming that the green light on the front of the PhoneTree unit is on.

5. **Reconnect the Phone Line Cable to PhoneTree**

   Disconnect the analog telephone from the wall outlet and reconnect the phone cable to the phone port on the back of the PhoneTree unit. Confirm that all other cables (USB, etc.) for PhoneTree are connected.

6. **Test Line**

   From the Admin desktop, click on the **Configure Phone Lines** icon.

   In the Select Line box, confirm that the lines purchased and connected are displayed without hyphens appearing before or after the line number, and that each line shows up as "Detected" with the green dot when selected (as shown on Line 1 in the picture at right). If one or more lines are not **Detected** as shown on this screen, follow the instructions in the **Line Card Not Found** troubleshooting section on page 92.

   Select the line in question in the **Select Line** box, then click the **Test Line** button.

   On the **Test Line Number** dialog, use these controls to determine if HealthWave can detect a dial tone (click the **Get dialtone** button) and make a test call (enter a number for HealthWave to dial, then click the **Dial number** button). If a successful test call was made, click **OK** and repeat the process with any other active lines.

7. **Call Customer Support**

   If you have tried all these steps and none have worked, it's possible there is an issue with the line card inside your PhoneTree unit or other hardware. Please contact Customer Support at **800.555.0559** or **hcsupport@phonetree.com**.
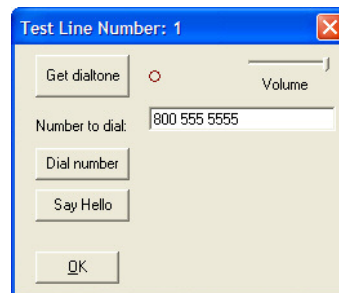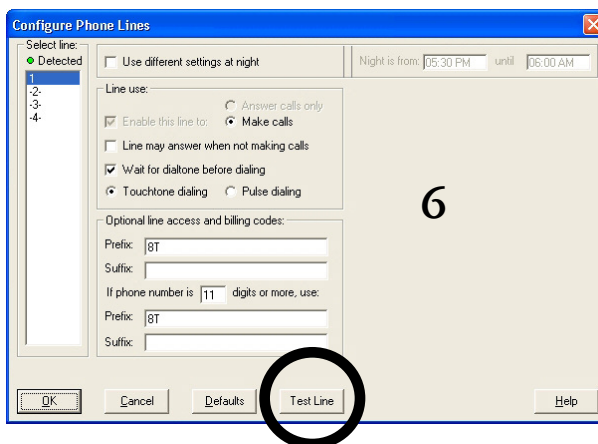
Checking DIP Switches (G2PT)

If you have purchased **more** than 2 lines AND you cannot get your PC to recognize one or more of your correctly connected phone lines, read the following:

Each PhoneTree unit has a 4-position DIP switch located on the back. The switches must be set to properly identify the unit as Lines 1-2, Lines 3-4, etc. Where possible, these switches are preset to their correct configuration before your PhoneTree unit(s) are shipped to you (based on your order). If your unit is not set correctly, you will not see the lines appear correctly in your computer's **Device Manager** (see page 18), and you will need to follow these instructions:

To set the DIP switches:

1. Shut down the HealthWave software.

2. Disconnect all cables connected to your PhoneTree unit(s).

3. Position the PhoneTree unit upright on its base (see picture on page 10). Using the reference chart below, change the switches with a sharp, pointed object. For instance, if you have two PhoneTree units, set one unit to Lines 1-2 and the other to Lines 3-4.

4. After reconnecting all cables, use the **Device Manager** as described on page 18 to verify that the unit has in fact been properly identified.

DIP Switch Configurations:

| Lines 1-2 | Lines 3-4 | Lines 5-6 | Lines 7-8 |

Appendices

Checking Call Status

You have the ability to check the call status of Appointments or Other Applications anytime (before, during or after a call session — however you must pause calls if you wish to do this in the middle of a call session). If you followed the instructions for an Automatic Report (see pages 39 or 76) an e-mail will be sent each day with an attachment in Word format containing a Call Status Report. However, you can manually check the call status also, and print a report. Here's how to do this:
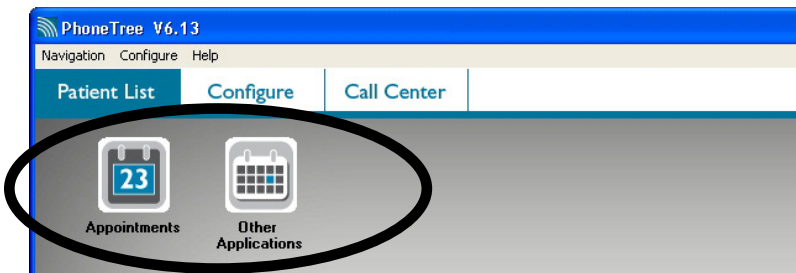
Click on the **Patient List** tab, then, depending on which call statuses you wish to view, click either the **Appointments** or **Other Applications** (Recalls, Collections, Reschedules, etc.) icon.

This screen is the Patient **List Viewer** for Appointments. You can check call statuses for each patient on-screen by noting the contents of the Call Status column. Please see pages 87-88 for a list of common call statuses and their meanings.

Manually Printing a Call Job

In addition to checking call statuses on screen, you may Print a report manually. To do this:
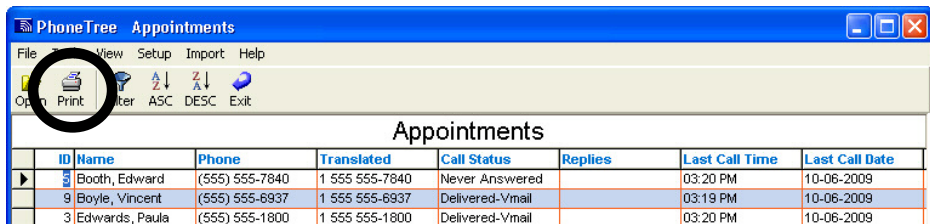
a) Click the **Print** in the toolbar
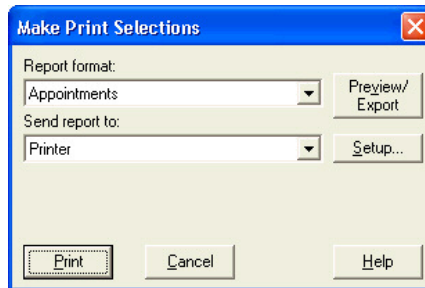
b) Choose **Appointments** (or other available report) from the **Report format** drop-down menu, then choosing **Printer** from the **Send report to** drop-down menu. Then click **Print**.
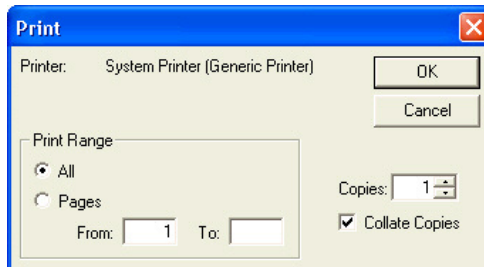
c) Make the appropriate choices on the **Print** dialog box (the report will be printed to the HealthWave computer's default printer), and click **OK**.

Appendices: Using the Call Logs

Using the Call Logs

You may also want to look up the results of a calling job from days, weeks or months ago.
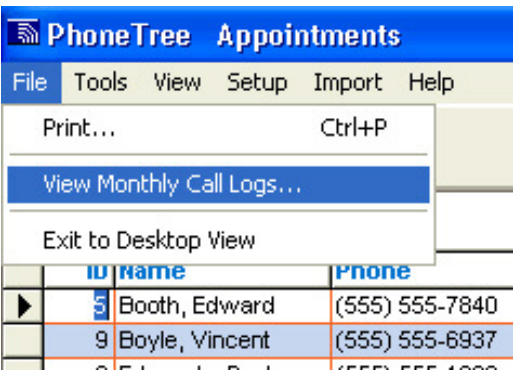
From the **File** menu, choose **View Monthly Call Logs**…
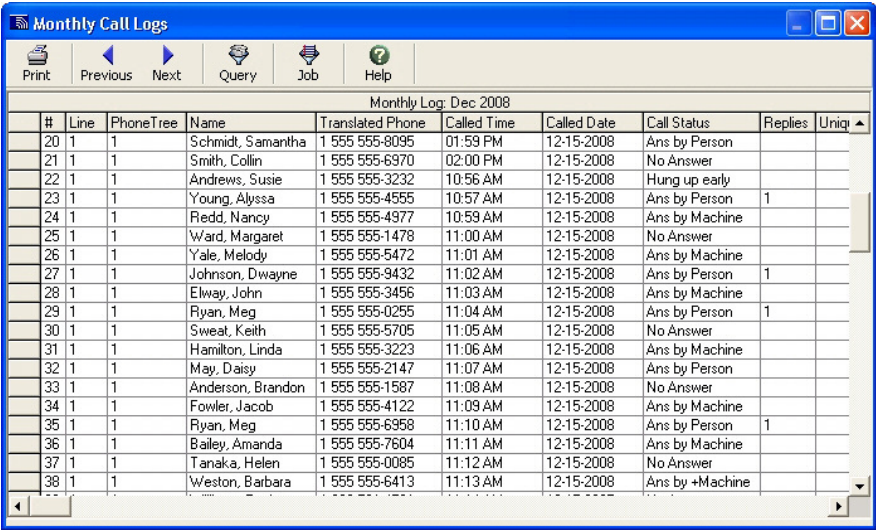
Clicking the **Monthly** button brings up the entire month's of logs. Click **Previous** or **Next** to change months.

Clicking the **Job** button brings up a box that allows you to choose between a single job (a job is a single call session with a unique list of patients), the last 10, 50 or 100 jobs, and other options:
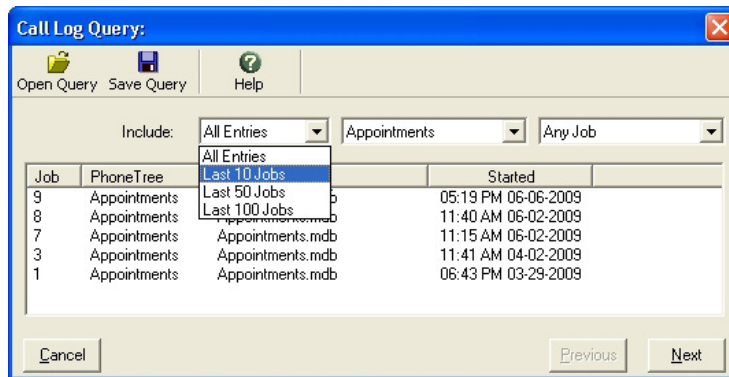
Clicking **Next** generates the **Call Log Query** screen, where you can further refine your search if necessary. After making the appropriate selections, click **Finish**.
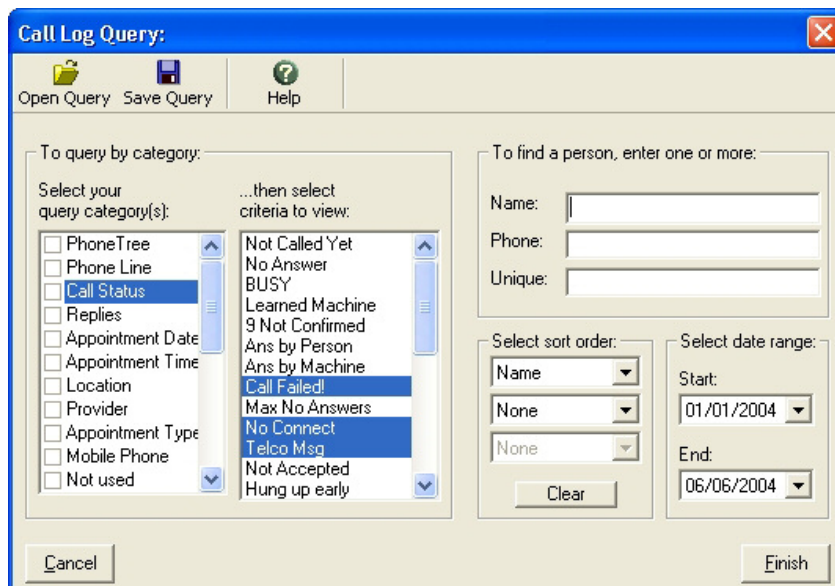
Print any Call Log Query by clicking the **Print** button (on the toolbar of the main Call Logs screen, see page 100), then choose the desired **Report Format** to use and click **Print**.

Custom Views

The View feature allows you to pick and choose which fields you see on your call list, as well as sort or filter your call list, based on a number of different criteria.

By default, the Appointments List view displays for Appointments and Other Applications as it contains the columns most systems use. You can create or edit a preexisting view to select the data you need to see and even filter out certain data within a field, if you choose. Keep in mind, you can always create more than one view per call list if needed. **Note**: Customized views are for use while on the List Editor screen and may appear in part or not at all on your call status report.
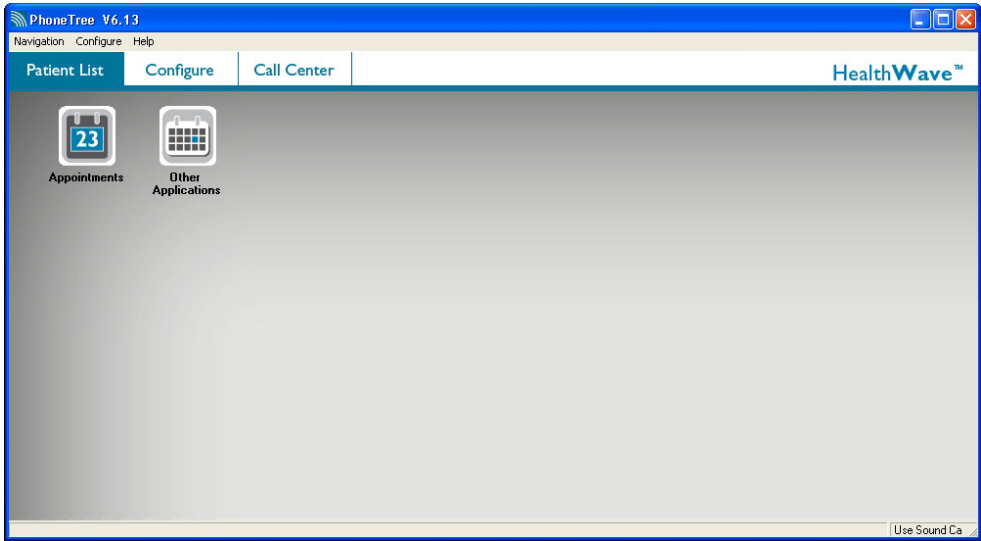
a) Start by clicking on the Patient List tab. Then, click on Appointments or Other Applications. The List Editor will now appear.

b) Click on the **Filter** icon from the top toolbar.

c) The **Filter/Sort** Menu appears.

   To make edits to a preexisting view, proceed to step d.

   To create a new view, click **Add**. You will be asked to choose a name for the new view. Type in a name and then click **OK**.
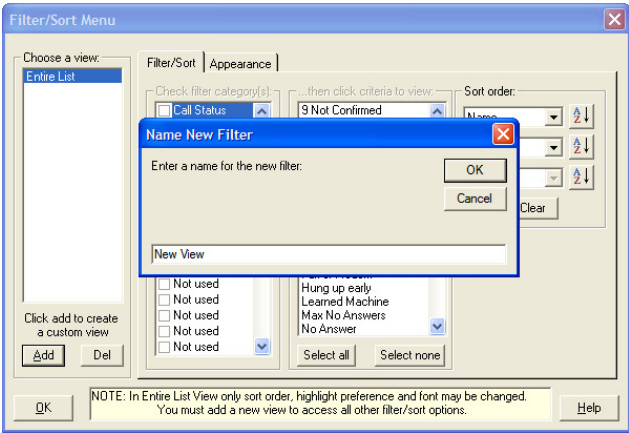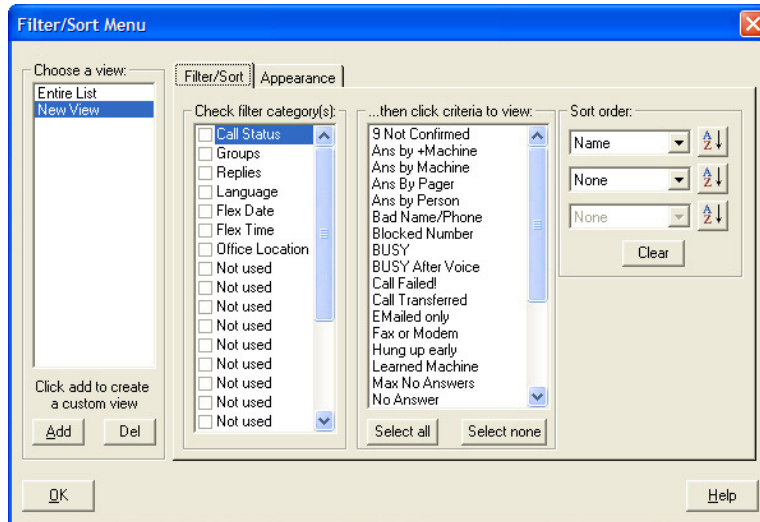
d) The **Filter/Sort** tab allows you to filter out certain entries in for certain fields. For instance, the Call Status field shows a list of all possible call statuses. If you wanted to only view certain call statuses, you could check the Call Status box and in the next column choose which statuses you wanted to view. Any member falling under a call status that is not selected would be removed from the new View, but not the call list. To see everyone again, choose Appointments List from the View menu.

Also, to sort your call list by a certain field, choose up to three different fields and the order to be arranged in under **Sort Order**.
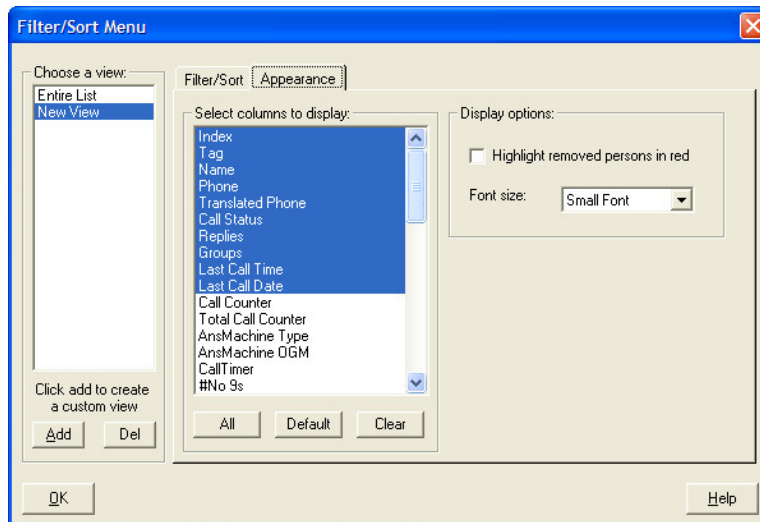
e) The **Appearance** tab allows you to select which fields you want visible in your view. Click to select a field. Click again to deselect. When finished. click **OK**.

Multi-Practice Configurations

If your HealthWave configurations are set for more than one practice, you will be prompted to select which practice to use when accessing certain areas (**Note:** Anytime you make an adjustment to one practice, you may need to make the same adjustment for all additional practices.). Below is an example from the beginning of the Appointments Options wizard:
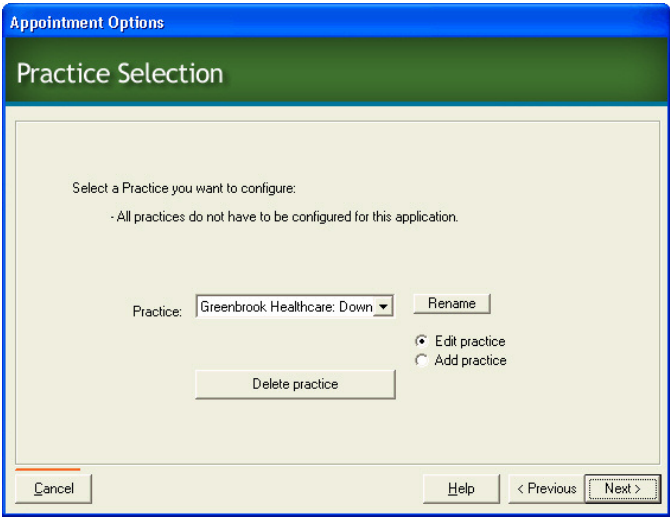
To add an additional practice, select **Add practice** and then enter a name in the **Practice name** box. To make changes to an existing practice, choose **Edit practice** and then select the desired practice from the **Practice** drop-down menu. *Only one practice can be added or edited at a time.* To rename a practice, select a preexisting practice from the drop-down menu, then click **Rename**. Enter the new name of the practice in the box provided, then click **OK**.

Click **Next** to proceed with any configuration changes you may have.

Warranty Information

Warranty Information

Full One Year Warranty

PCS warrants its products to be free from defects in materials and workmanship for a period of one full year from the original date of purchase.

Defective products returned to PCS will be repaired or replaced, at our option, if returned within the warranty period. PCS may use new or reconditioned parts to repair your unit.

The repair or replacement shall be warranted for either 90 days, or the remainder of the warranty period, whichever is longer.

Limitations: PCS makes no implied warranties, including those of fitness for a particular purpose or merchantability. PCS will not pay for loss of time, inconvenience, loss of use of your PCS product or property damage caused by your PCS product or its failure to work, or any other incidental or consequential damages.

State Law Rights

This warranty gives you specific legal rights. You may also have other rights which vary from state to state.

To Receive Service (In Warranty)

To receive technical assistance with your PhoneTree system, please call **800.555.0559** and you will be connected with one of our helpful Customer Support technicians. They will remotely connect to your computer to see the problem first hand and attempt to correct it. If your problem is found to be related to your PhoneTree hardware, we will provide you with a Return Authorization Number (RA#) and you will be requested to mail us the unit. *(An RA# is only valid up to 30 days after it has been issued. If this period has expired before return there must be a new number issued before a return will be allowed. Any shipments received without an RA# will be returned to the customer.)*

You must pay the shipping charges to send us the unit. Carefully package your PhoneTree hardware (we recommend that you use the original packing materials) along with your RA#, name, address, phone number and a description of the problem. PCS is not responsible for damage that occurs in shipping from the customer. PCS pays the return shipping. Repair or replacement is your exclusive remedy.

> Mail your unit to:
> Personal Communication Systems, INC
> Attn: Customer Support
> 301 N. Main Stree, Suite 1800
> Winston-Salem, NC 27101

This warranty does not cover defects resulting from accidents, alterations, unauthorized repair, failure to follow instructions, misuse, fire, flood, and acts of God. Nor does PCS warrant this product to be compatible with any particular telephone equipment or switching systems.

PCS makes no other warranties expressed or implied.

Note: The PhoneTree hardware contains no user serviceable parts.

To Receive Service (Out of Warranty)

If your PhoneTree warranty has expired and you are experiencing a technical problem, please call Customer Support at **800.555.0559**. You will be asked to either pay a per incident fee or renew your Service Agreement to allow a technician to assist with resolving your issue. If the problem is found to be related to your PhoneTree hardware, there will be an additional fee to have it repaired. You will be issued a Return Authorization Number (RA#) and asked to send us the unit. Once your unit has been received and tested, a technician will contact you with the repair costs. *(An RA# is only valid up to 30 days after it has been issued. If this period has expired before return there must be a new number issued before a return will be allowed. Any shipments received without an RA# will be returned to the customer.)*

You must pay for shipping charges to send us the unit. Carefully package your unit (we recommend that you use the original packing materials) along with your name, address, phone number and a description of the problem. PCS is not responsible for damage that occurs in shipping from the customer. PCS pays the return shipping. Repair or replacement is your exclusive remedy.

Mail your unit to:
Personal Communication Systems, INC
Attn: Customer Support
301 N. Main Stree, Suite 1800
Winston-Salem, NC 27101

PCS has a fixed price repair policy (includes return ground shipping). We will repair or replace, at our option, any PhoneTree unit using new or remanufactured parts and include a 90-day parts and labor warranty.

This warranty does not cover defects resulting from accidents, alterations, unauthorized repair, failure to follow instructions, misuse, fire, flood, and acts of God. Nor does PCS warrant this product to be compatible with any particular telephone equipment or switching systems.

PCS makes no other warranties expressed or implied.

Note: The PhoneTree hardware contains no user serviceable parts.

Notes

Regulatory Information

Regulatory Information: Model No: G2PT

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions:

(1) This device may not cause harmful interference, and (2) This device must accept any interference received, including interference that may cause undesired operation.

This device requires the ferrite provided in the package on the telephone line(s) to comply with FCC emission limits.

You are cautioned that any changes or modifications not expressly approved in this manual could void your authority to operate this device.

This equipment complies with Part 68 of the FCC Rules. On the bottom of this equipment is a label that contains among other information, the FCC Registration Number and Ringer Equivalence Number (REN) for this equipment. You must, upon request, provide this information to your telephone company. **(NOTE: REN is not required for some types of analog or digital facilities.)**

This equipment uses USOCs jacks RJ14.

An FCC compliant telephone cord and modular plug are provided with this equipment. This equipment is designed to be connected to the telephone network or premises wiring using a compatible modular jack which is part 68 compliant. See installation instructions for details.

The REN is useful to determine the quantity of devices you may connect to your telephone line and still have all those device ring when your number is called. In most, but not all areas, the sum of the RENs of all devices connected to your line should not exceed five (5.0). To be certain of the number of devices you may connect to your line, as determined by the REN, you should contact your local phone company to determine the maximum REN for your calling area. **(NOTE: REN are associated with loop-start and ground-start ports. Do not use for E&M or digital ports)**

If your telephone equipment causes harm to the telephone network, the Telephone Company may discontinue your service temporarily. If possible, they will notify you in advance. But if advance notice is not practical, you will be notified as soon as possible. You will be informed of your right to file a complaint with the FCC.

Your telephone company may make changes in its facilities, equipment, operations or procedures that could affect the proper functioning of your equipment. If they do, you will be notified in advance to give you an opportunity to maintain uninterrupted telephone service.

If you experience trouble with this telephone equipment, please contact Personal Communication Systems (1 336-722-5008) for information on obtaining service or repairs. The telephone company may ask that you disconnect this equipment from the network until the problem has been corrected or until you are sure that the equipment is not malfunctioning.

There are no user serviceable parts inside.

This equipment may not be used on coin service provided by the telephone company. Connection to party lines is subject state tariffs.

INDUSTRY CANADA (IC) NOTICE
"NOTICE: The Industry Canada (IC) label identifies certified equipment. This certification means that the equipment meets telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The department does not guarantee the equipment will operate to the user's satisfaction.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

Repairs to certified equipment should be coordinated by a representative designated by the supplier. Any repairs or alterations made by a user to this equipment, or equipment malfunctions, may give the telephone company cause to request the user to disconnect the equipment.

Users should ensure for their own protection, that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

CAUTION: Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.

"NOTICE: The Ringer Equivalence Number (REN) assigned to each terminal device provides an indication of the maximum number of terminals allowed to be connected to a telephone interface. The termination on any interface may consist of any combination of devices subject only to the requirement that the sum of the Ringer Equivalence Numbers of all the devices does not exceed 5."

REN: 0.7B

WARRANTY AND REPAIR SERVICE CENTER:
Personal Communication Systems, Inc.
301 N. Main Street, Suite 1800
Winston-Salem, NC 27101
 800.555.0559

Regulatory Information: Model No: G2PT-R24

This equipment complies with Part 68 of the FCC rules and the requirements adopted by the ACTA. On the BOTTOM COVER of this equipment is a label that contains, among other information, a product identifier in the format US:AAAEQ##TXXXX. If requested, this number must be provided to the telephone company.

List all applicable certification jack Universal Service Order Codes ("USOC") for the equipment. For some types of analog and digital systems, list associated Facility Interface Codes ("FIC") and Service Order Codes ("SOC"). These are required when the customer orders service from the local telephone company. Refer to Alliance for Telecommunications Industry Solutions ("ATIS") Technical Report No. 5 for a more extensive listing of jack configurations and their designations (e.g., RJ11C), or refer to the Telcordia NC/NCITM Decoder for a full listing. 24 Pair Service.

The REN is used to determine the number of devices that may be connected to a telephone line. Excessive RENs on a telephone line may result in the devices not ringing in response to an incoming call. In most but not all areas, the sum of RENs should not exceed five (5.0). To be certain of the number of devices that may be connected to a line, as determined by the total RENs, contact the local telephone company. For products approved after July 23, 2001, the REN for this product is part of the product identifier that has the format US:AAAEQ##TXXXX. The digits represented by ## are the REN without a decimal point (e.g., 03 is a REN of 0.3). For earlier products, the REN is separately shown on the label.

If the terminal equipment G2PT-R24 causes harm to the telephone network, the telephone company will notify you in advance that temporary discontinuance of service may be required. But if advance notice is not practical, the telephone company will notify the customer as soon as possible. Also, you will be advised of your right to file a complaint with the FCC if you believe it is necessary.

The telephone company may make changes in its facilities, equipment, operations or procedures that could affect the operation of the equipment. If this happens, the telephone company will provide advance notice in order for you to make necessary modifications to maintain uninterrupted service.

If trouble is experienced with equipment G2PT-R24, or for repairs or warranty information, please contact Personal Communication Systems, Inc. 301 N. Main Stree, Suite 1800, Winston-Salem, NC, 27101. If the equipment is causing harm to the telephone network, the telephone company may request that you disconnect the equipment until the problem is resolved.

There are no user serviceable parts in this equipment. Please contact customer support at Personal Communication Systems, Inc. at the above address for service.

Connection to party line service is subject to state tariffs. Contact the state public utility commission, public service commission or corporation commission for information.

If your home has specially wired alarm equipment connected to the telephone line, ensure the installation of this G2PT-R24 does not disable your alarm equipment. If you have questions about what will disable alarm equipment, consult your telephone company or a qualified installer.

This equipment is not hearing aid compatible.

WARRANTY AND REPAIR SERVICE CENTER:
Personal Communication Systems, Inc.
301 N. Main Street, Suite 1800
Winston-Salem, NC 27101
800.555.0559

Notes

Notes

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