PhoneTree®
Proven. Professional. Trusted.™

USER GUIDE

HealthWave™ (Hosted)

Revised 12/2010

Table of Contents

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** (8:30 AM to 5:30 PM EST, M-F) or **hcsupport@phonetree.com**.

Notice of Liability

The information in this book is intended to be accurate and useful with the operation of your PhoneTree 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.

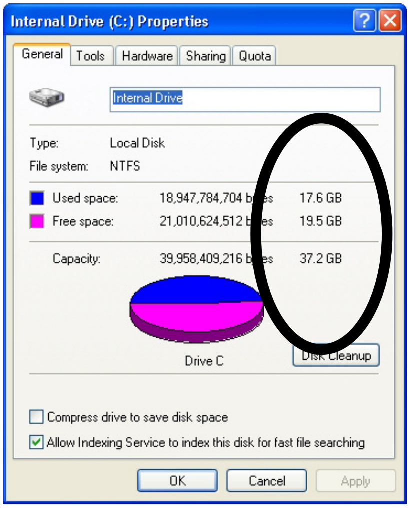
Trademarks

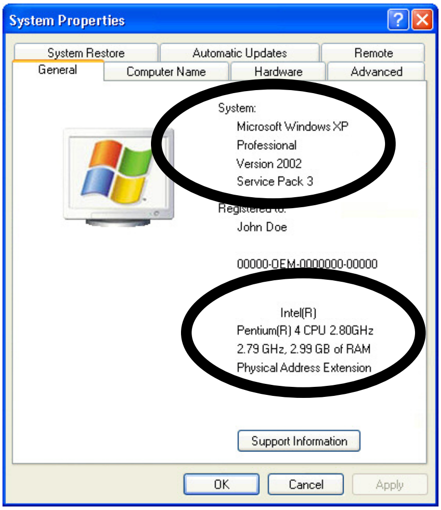
The trademarked names used in this book are used for editorial purposes only and to the benefit of the trademarked owner with no intention of infringement of the trademark. We further state that PhoneTree, Proven. Professional. Trusted., HealthWave and the PhoneTree logo are all trademarks of Personal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

Pre-Configuration Steps

Step One: Check System Requirements

HealthWave requires a minimum set of requirements from your system in order to work correctly. If your PC has fewer than these requirements, HealthWave may not complete certain tasks well or at all.





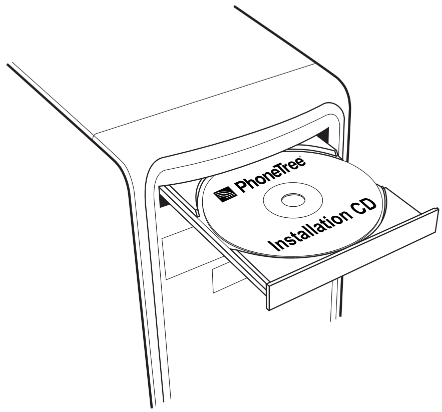
Minimum System Requirements

- 1.4GHz or faster processor (32-bit or 64-bit)
- 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
- Sound Card
- High-speed Internet access (for remote installation and support as provided by PhoneTree Customer Support and connecting to PhoneTree's servers*)

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

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

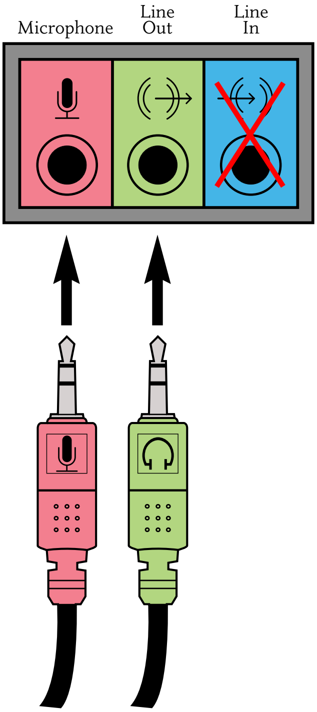
Insert the **HealthWave Installation CD** into your CD/DVD drive. The installer screen should start automatically (if it does not, double-click on the CD/DVD drive ▸ **PhoneTreeMVPu** ▸ **setup**). Click **Next** and follow the on screen instructions. When prompted, enter the supplied **Serial Key** (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.

Step Three: Connect Microphone and Headset

If you plan to record your messages instead of using the Text-to-Speech software, you must connect the included microphone and headset to your PC.



Locate the Microphone and Line Out jacks on your PC. Most PC manufacturers place these jacks on the front or back of the computer (sometimes both). These are usually color coded as **Pink** (microphone) and **Green** (line out). If your PC lacks any color coding, use the symbols shown above to identify each jack.

Connect the **Microphone plug** to the **Microphone jack** and the **Headphone plug** to the **Line Out jack**.

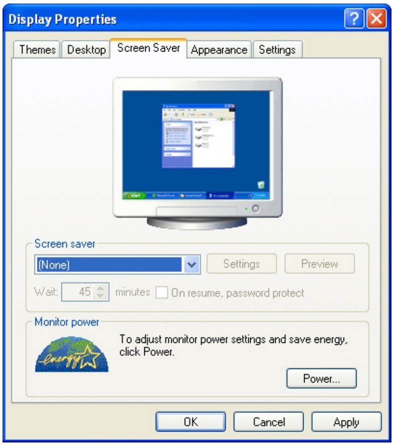
Note: If you currently have speakers plugged into the Line Out jack, you can leave those connected, or unplug them and opt to use the headphones instead.

Step Four: Turn Off PC Hibernation

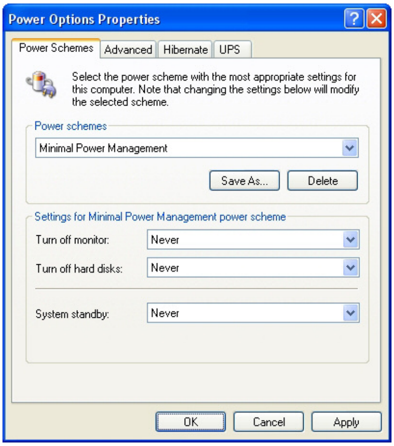
For Windows XP:

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 HealthWave. To resolve this:

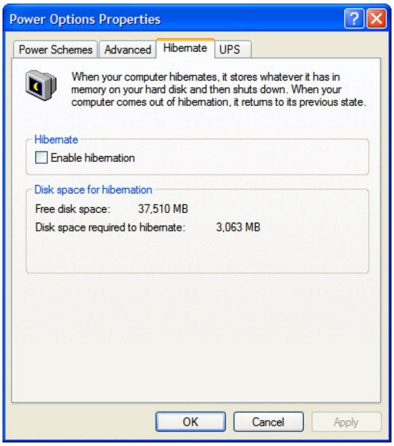
1. Right-click on a blank area of your desktop and choose **Properties**.
2. Click on the **Screen Saver** tab.
3. Disable your screen saver by choosing "**None**" from the drop-down, then click the **Power** button (see picture at right).



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.

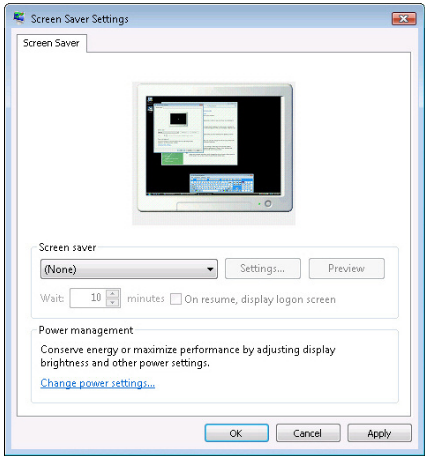


5. Make sure the **Enable hibernation** option is NOT selected on this Hibernate tab. Click **OK**, then click **OK** on the **Display Properties** screen.

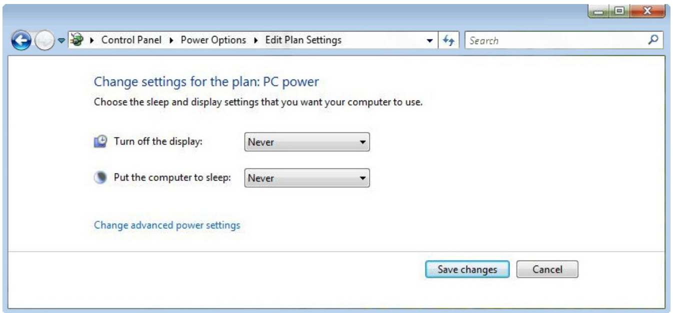


For Windows Vista/Windows 7:

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**.



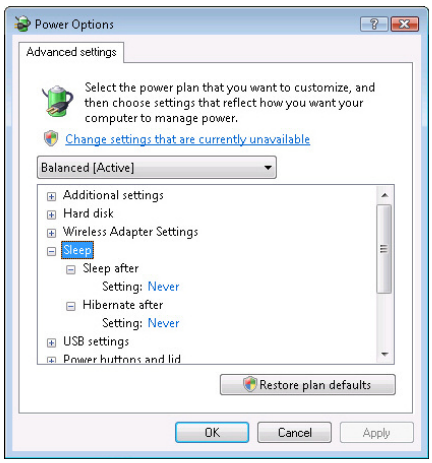
6. From the list of advanced settings, click the "+" sign next to the following items:

   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.



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

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

1) Your data file(s), 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 data 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.

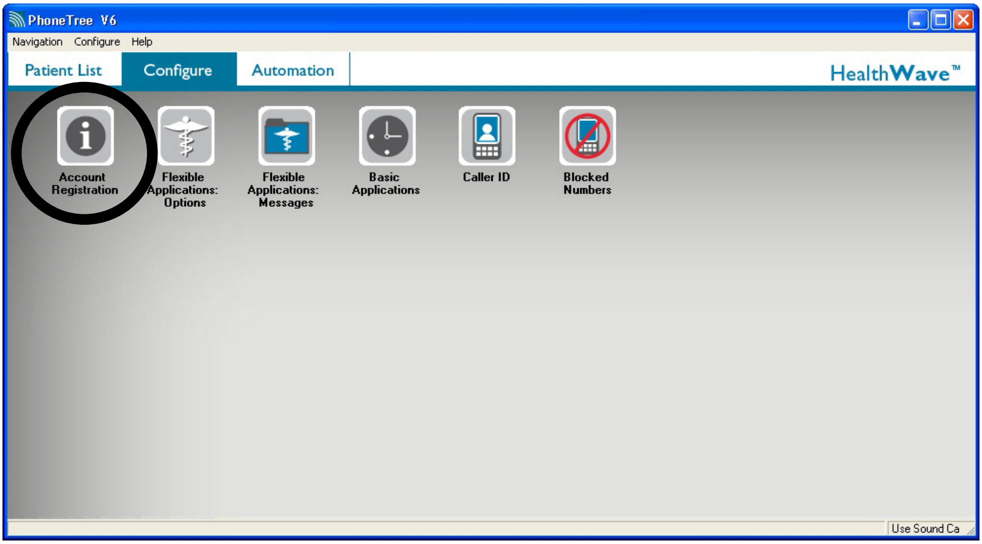
Notes

Configurations:

- Account Registration
- Flexible Applications:
- Options
- Message

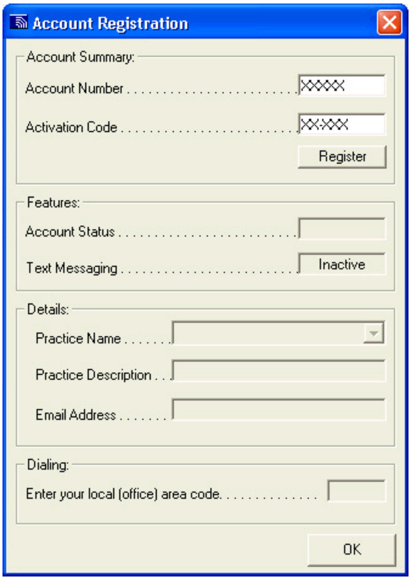
Hardware not detected

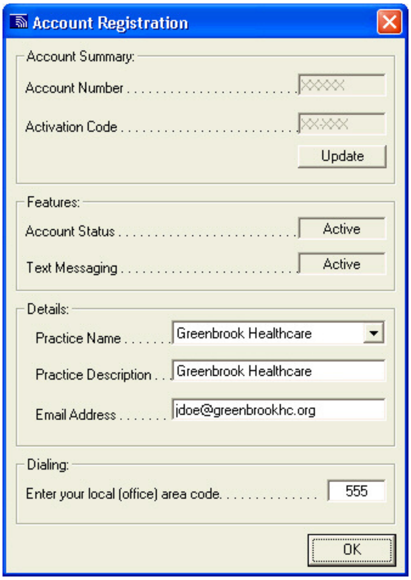
Launch the HealthWave software and this box will appear. Since your HealthWave system does not require hardware to operate, click **Don't ask me again** and then click **Hosted Services**.



Account Registration

Before configuring your HealthWave software, you must first activate your account. Click the **Configure** tab, then click the **Account Registration** icon.

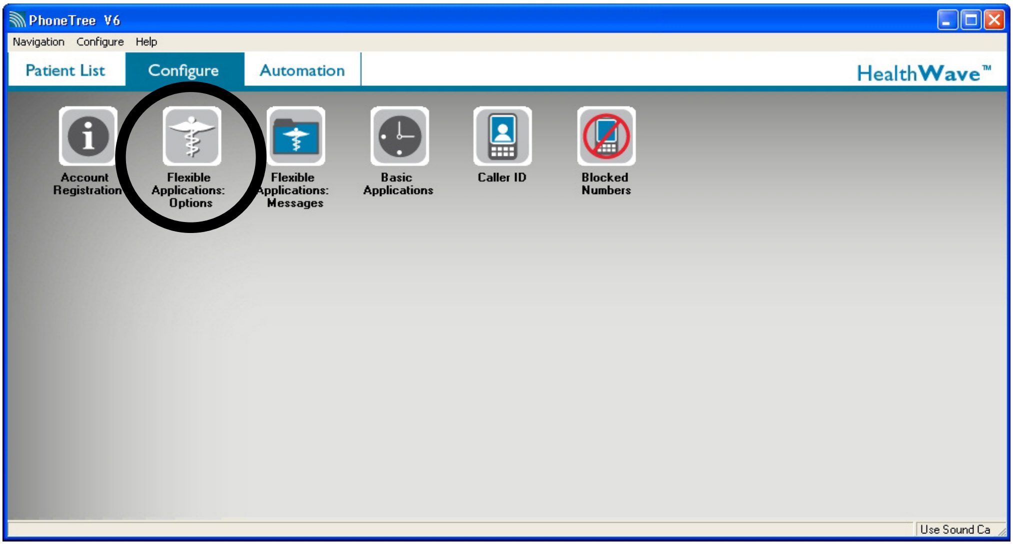




Under the **Account Summary** section, enter the account number and activation code (located inside the software case), then click **Register**. In the **Details** section, enter the destination **Email Address** and **Practice Description** for each practice purchased. HealthWave will use this information when sending call job(s).

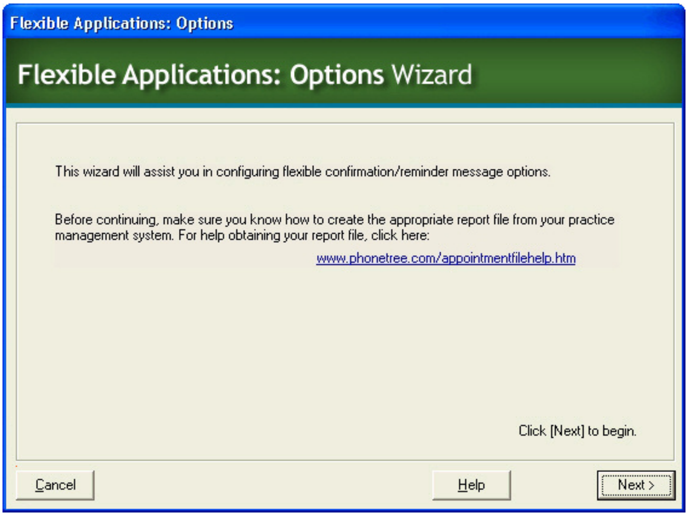
Under **Dialing**, enter the your local office area code, then click **OK**.

Note: The Text Messaging feature (see pages 43 and 64) will only appear "Active" if purchased. To purchase this feature or for more information, please contact PhoneTree Healthcare Sales at **800.951.8733**.



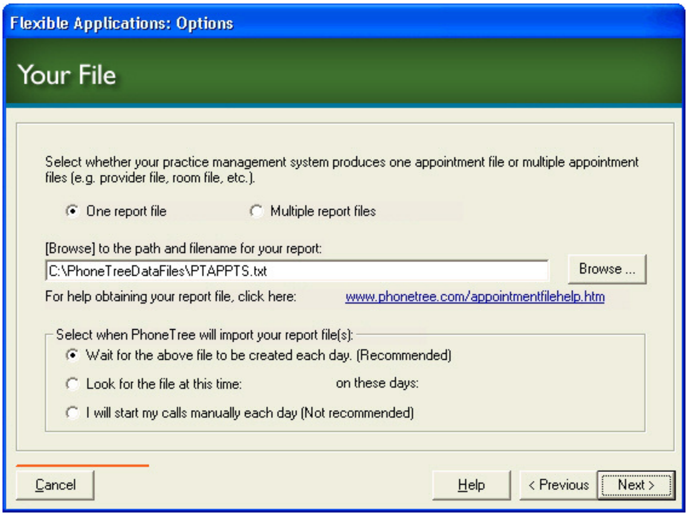
Step One: Launch the Flexible Applications: Options Wizard

Click the **Flexible Applications: Options** icon.



This is the first Options Wizard screen, remaining 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: Your File

On this screen, select either **One report file** (if you only exported one file from your PMS) or **Multiple report 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 report/data file(s). We recommend you save your data/report file to a known folder location (consider creating C:\PhoneTreeDataFiles) where you will be able to browse to them from the HealthWave computer. Once configured, each day HealthWave will read the data file(s) and use it to make calls. Once you have chosen the path to your data 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**.

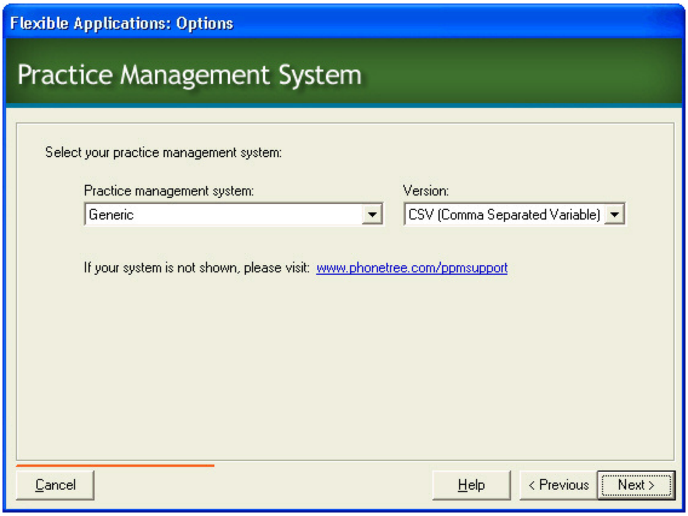
Now, choose one of the three options under **Select when PhoneTree will import your report file**:

a) **Wait for the above file to be created each day** (Recommended) We suggest you choose this option, because as soon as your data 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 report 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 messages. 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**.

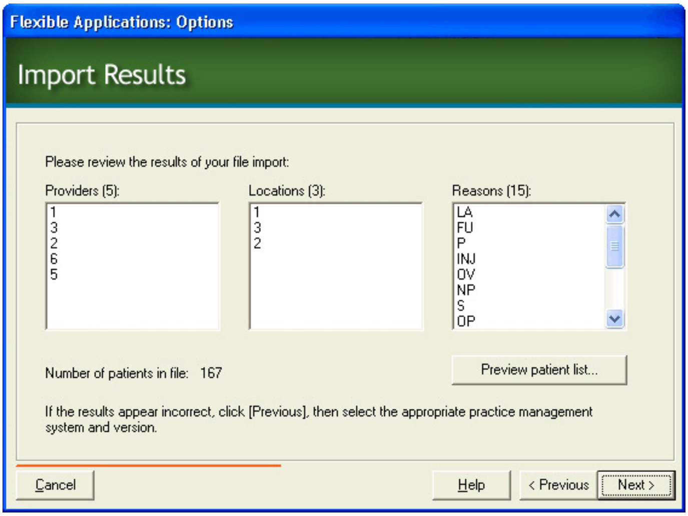


Step Three: Practice Management System

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**.

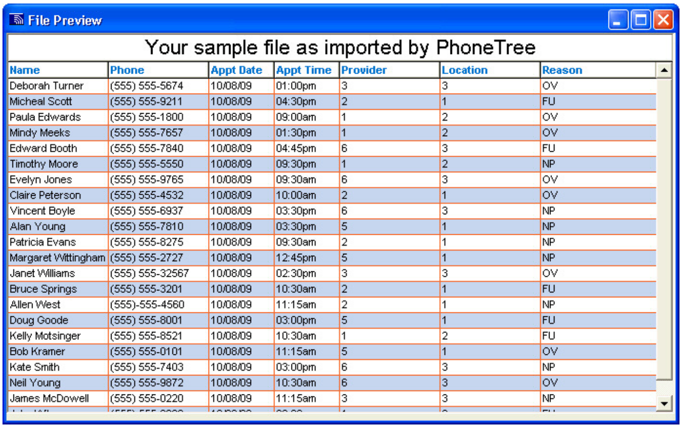
Note: If you are returning to this screen after original configuration and choose a new practice management system format, you will receive a warning that you are about to reset all of your message settings and configurations.

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.



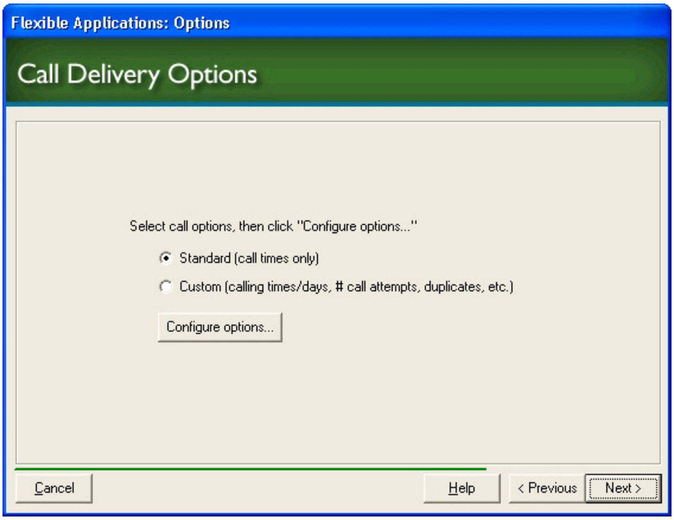
File Preview

Your sample file as imported by PhoneTree

Name	Phone	Appt Date	Appt Time	Provider	Location	Reason
Deborah Turner	(555) 555-5674	10/08/09	01:00pm	3	3	OV
Micheal Scott	(555) 555-9211	10/08/09	04:30pm	2	1	FU
Paula Edwards	(555) 555-1800	10/08/09	09:00am	1	2	OV
Mindy Meeks	(555) 555-7657	10/08/09	01:30pm	1	2	OV
Edward Booth	(555) 555-7840	10/08/09	04:45pm	6	3	FU
Timothy Moore	(555) 555-5550	10/08/09	09:30pm	1	2	NP
Evelyn Jones	(555) 555-9765	10/08/09	09:30am	6	3	OV
Claire Peterson	(555) 555-4532	10/08/09	10:00am	2	1	OV
Vincent Boyle	(555) 555-6937	10/08/09	03:30pm	6	3	NP
Alan Young	(555) 555-7810	10/08/09	03:30pm	5	1	NP
Patricia Evans	(555) 555-8275	10/08/09	09:30am	2	1	NP
Margaret Wittingham	(555) 555-2727	10/08/09	12:45pm	5	1	NP
Janet Williams	(555) 555-32567	10/08/09	02:30pm	3	3	OV
Bruce Springs	(555) 555-3201	10/08/09	10:30am	2	1	FU
Allen West	(555)-555-4560	10/08/09	11:15am	2	1	NP
Doug Goode	(555) 555-8001	10/08/09	03:00pm	5	1	FU
Kelly Motsinger	(555) 555-8521	10/08/09	10:30am	1	2	FU
Bob Kramer	(555) 555-0101	10/08/09	11:15am	5	1	OV
Kate Smith	(555) 555-7403	10/08/09	03:00pm	6	3	NP
Neil Young	(555) 555-9872	10/08/09	10:30am	6	3	OV
James McDowell	(555) 555-0220	10/08/09	11:15am	3	3	NP

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 PhoneTree Customer Support 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**.



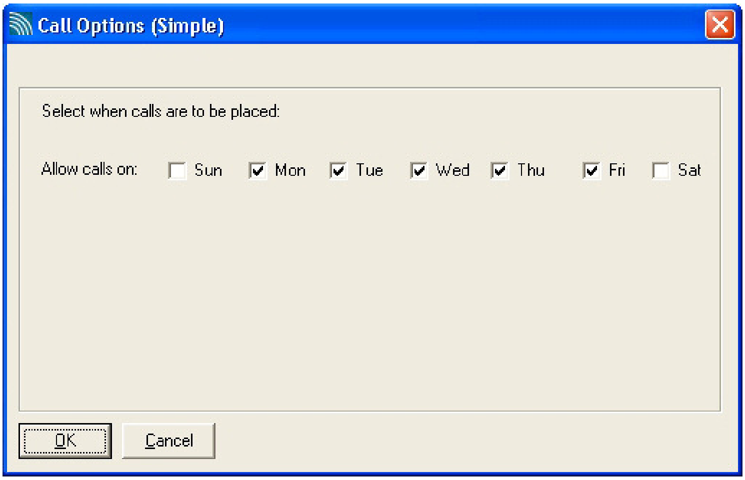
Step Five: Call Delivery Options

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

Choose **Simple** if you only wish to specify the days HealthWave will send messages on and keep the other settings at their defaults.

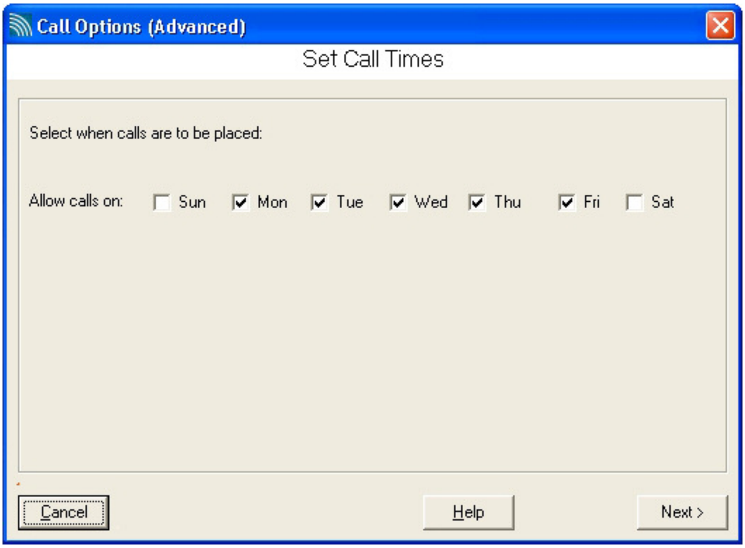
Choose **Custom** if you want to specify the days HealthWave will send messages on, plus access to other HealthWave calling options.

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



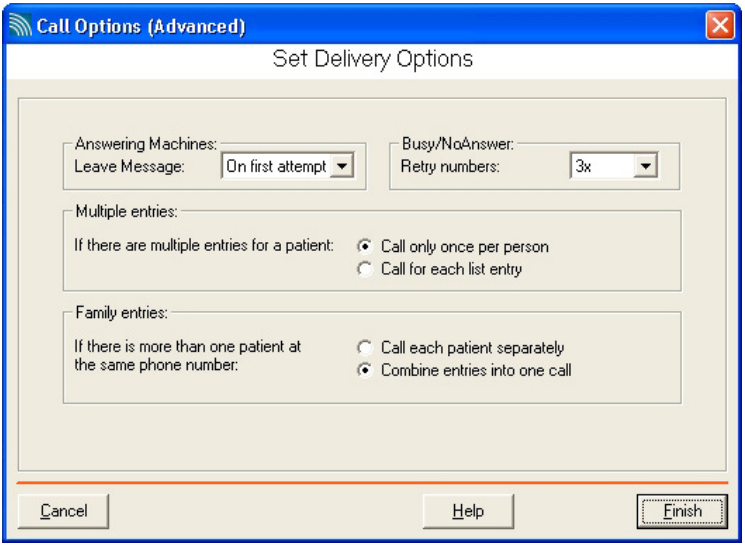
Simple Method

De-select any days that HealthWave should not send messages on (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 20), calls may not begin until your data file appears. Click **OK**.



Custom Method

On this first screen, de-select any days that HealthWave should not send messages on (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 20), calls may not begin until your data file appears. Click **Next**.



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**.

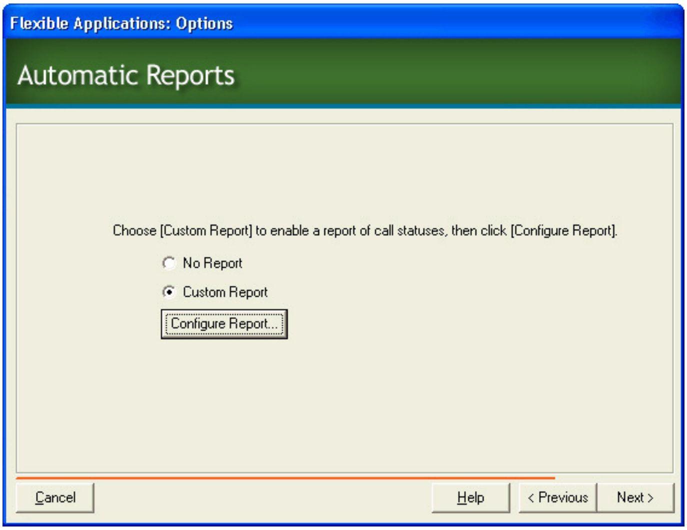
b) **Busy/No Answer**: Select the number of retries HealthWave makes to a busy or unanswered phone number. Once all retries have been exhausted, no further attempts will be made to that phone number for that call job. Choose from **3**-**8** retries.

c) **Multiple entries**: If a single patient appears on the data file more than once, 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 the data file, choose either to **Call each patient separately** or **Combine entries 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 Flexible Applications: Message wizard.

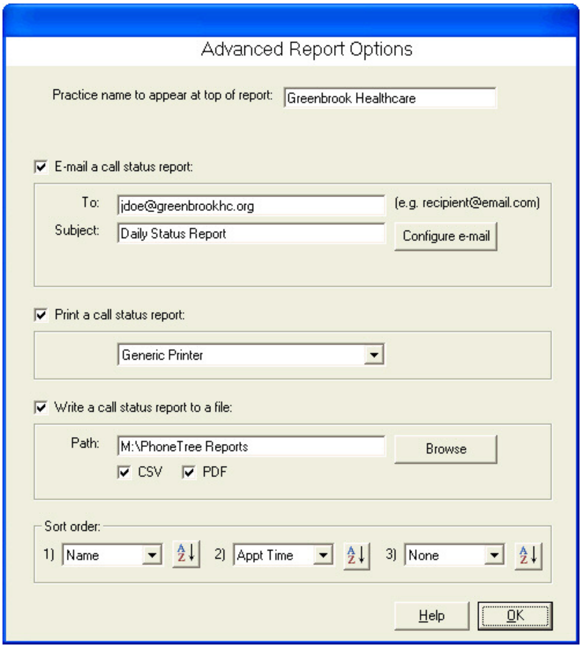
When finished making changes to these settings, click **Finish**.

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



Step Six: 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. Change the **Create report each day at** time if needed (allow ample time for your call job to complete). Next, choose how you would like to receive your Automatic Reports:

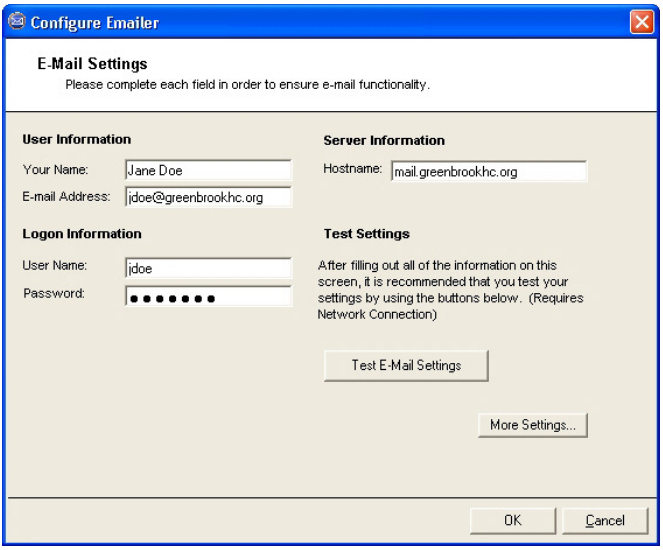
E-mail: Select **E-mail a call status report**. Then, enter the appropriate information in the **To** and **Subject** boxes (you can send this report to multiple addresses by separating them with a comma in the **To** box). Then click **Configure E-Mail** (see pages 27-28 for configuration instructions).

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.

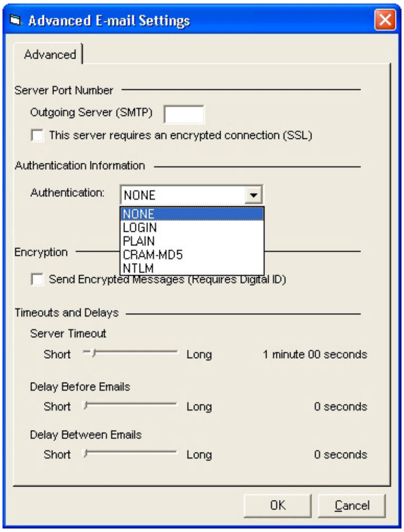
Under **Server Information**, the **Hostname** should be entered exactly as you have it entered in your main e-mail program.

Once you believe you have all the options set correctly, click the **Test E-Mail Settings** button.

Configurations: Options: Automatic Reports, continued

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.

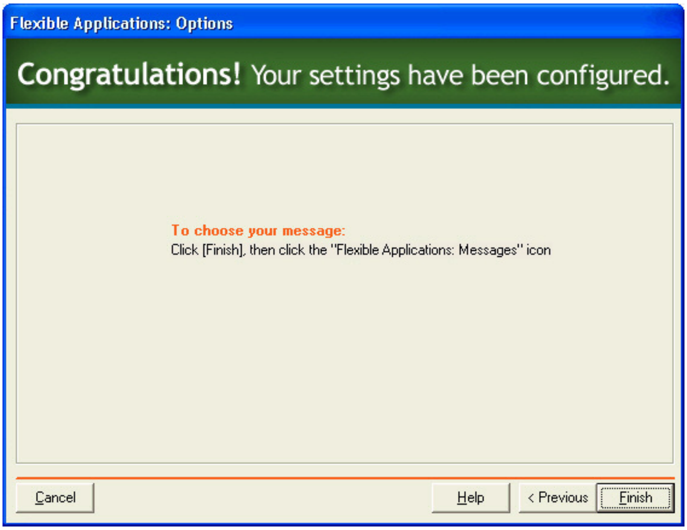
If you do not receive the confirmation message, it means that one or more of your settings are incorrect. It may be necessary to click the **More Settings**… button.



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**. Your HealthWave is now correctly configured to send e-mails for Automatic Reporting and for patient reminders, if selected (see pages 26, 44, 62 and 65).

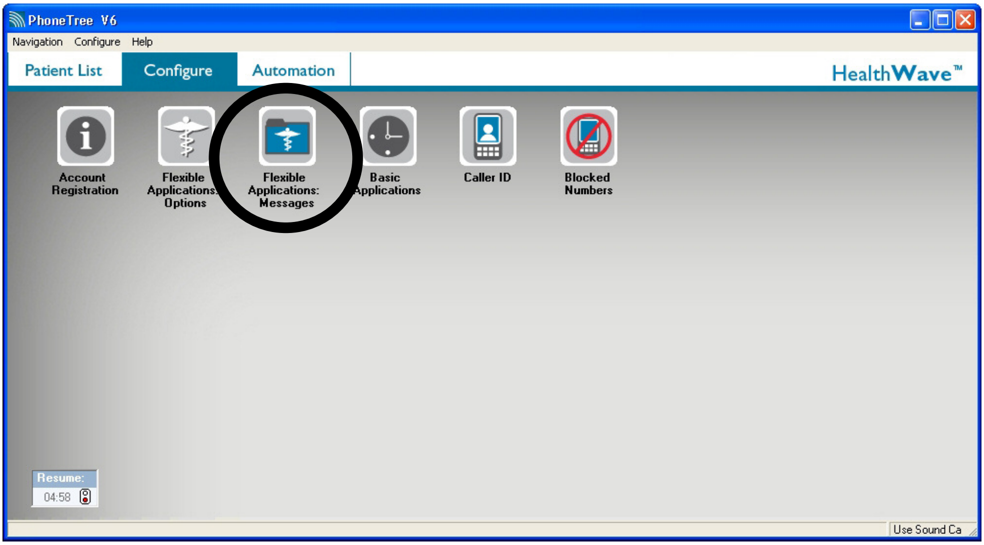
Click **Next**.



Step Seven: Confirmation

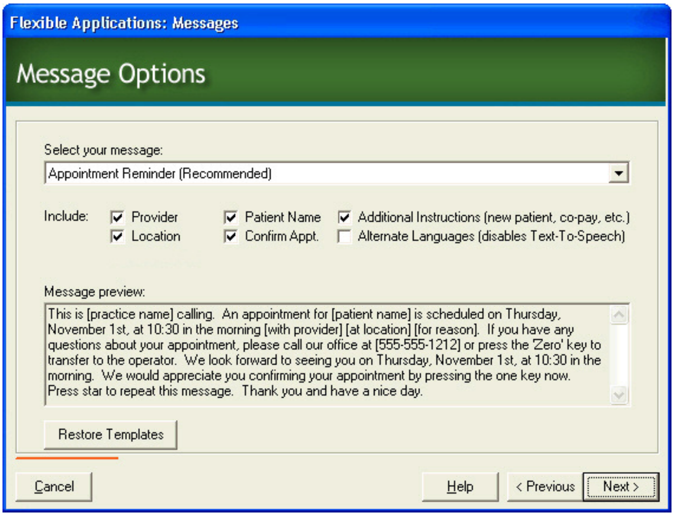
You've now finished the process of selecting your preferences, data file and calling options. Click **Finish**. Next, click on the **Flexible Applications: Message** icon on the **Configure** desktop to create your reminder message (see image, next page).

Configurations: Launch the Flexible Applications: Message Wizard



Step One: Launch the Flexible Applications: Message Wizard

Still on the **Configure** tab, click the **Flexible Applications: 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 42). 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.*

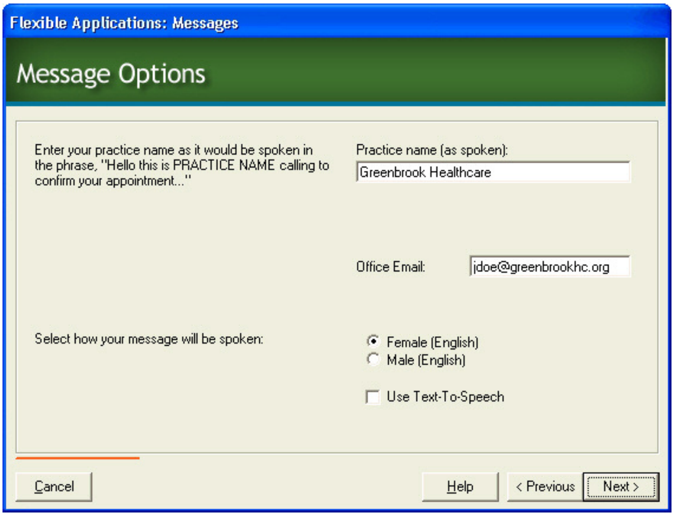
Additional Instructions inserts special messages for appointment types.

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.***

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

IMPORTANT: Once a call has been answered, either by a person or an answering machine, it has a **maximum time limit of 2 minutes** *(subject to change)* **before the call will timeout and disconnect**. Make sure your message's total length, including any and all content such as the **Additional Instructions** option, ***does not exceed*** this time limit.

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 message template.

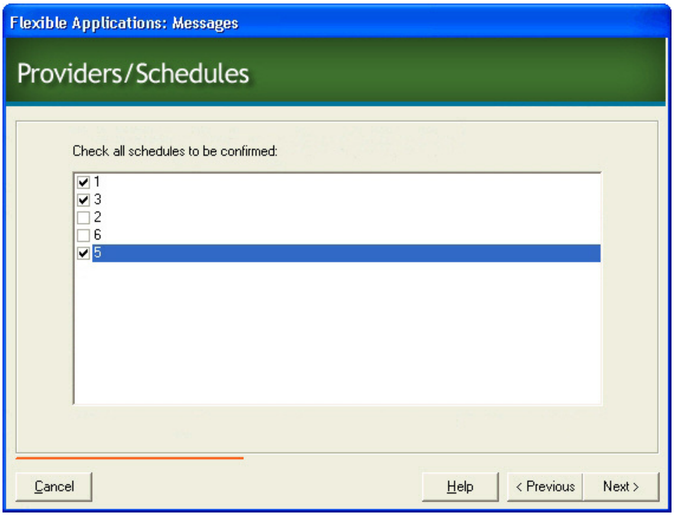


Step Three: Message Options, continued

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.

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.

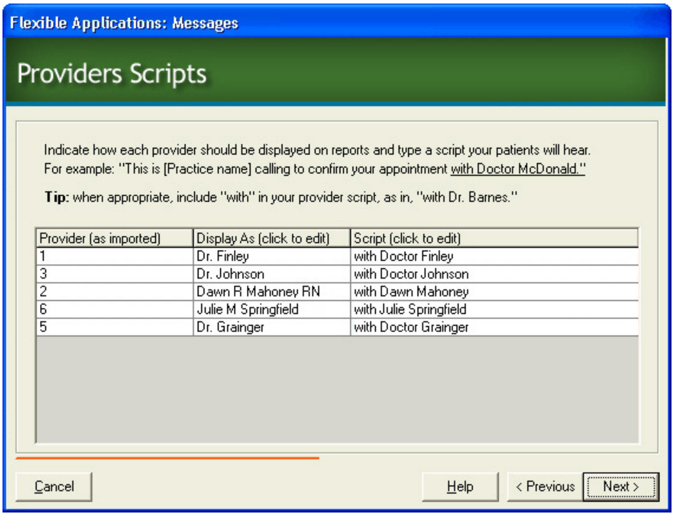
When finished, click **Next**.



Step Four: Providers/Schedules

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

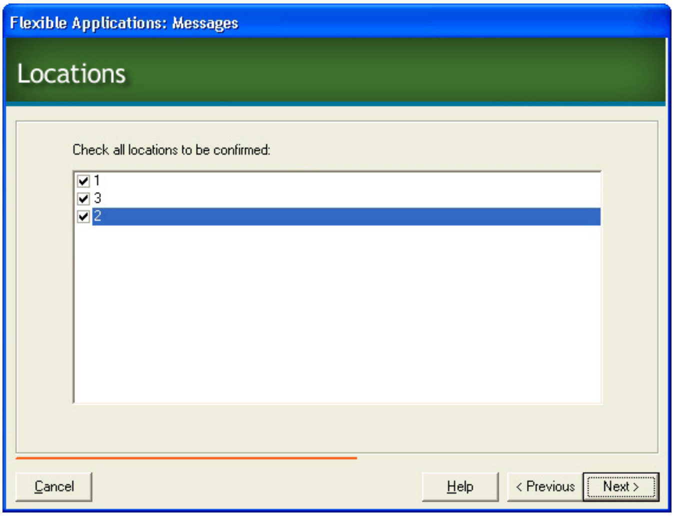
The **Display As** column will need to contain the provider names as you would like them to be displayed on-screen in HealthWave and on e-mailed or printed reports.

The **Script** column will need to contain the script for each provider, based on what you want to be heard in your 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 a message. However, the provider name will not be mentioned.

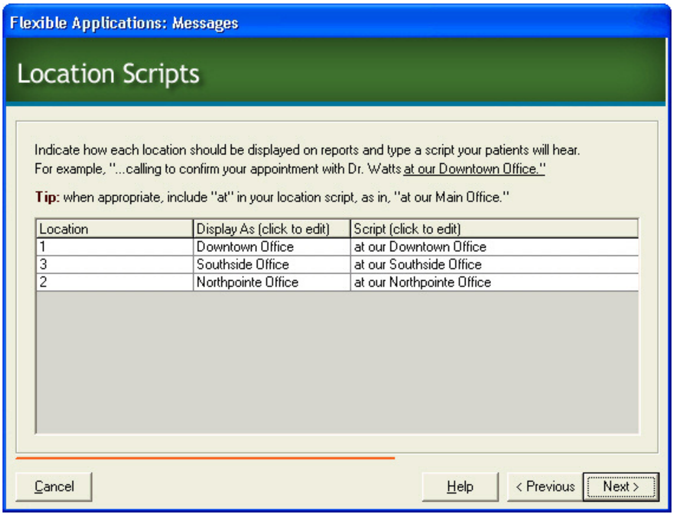
When finished, click **Next**.



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 data 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 a message), be sure to deselect them in this list.

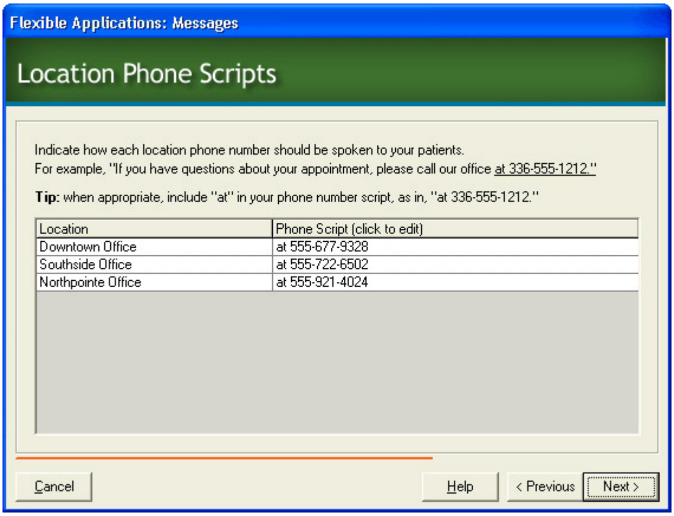
When finished, click **Next**.



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.

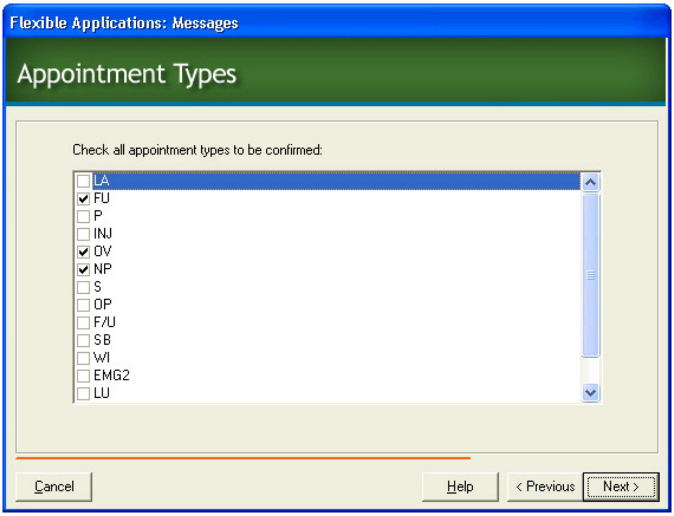
When finished, click **Next**.



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.

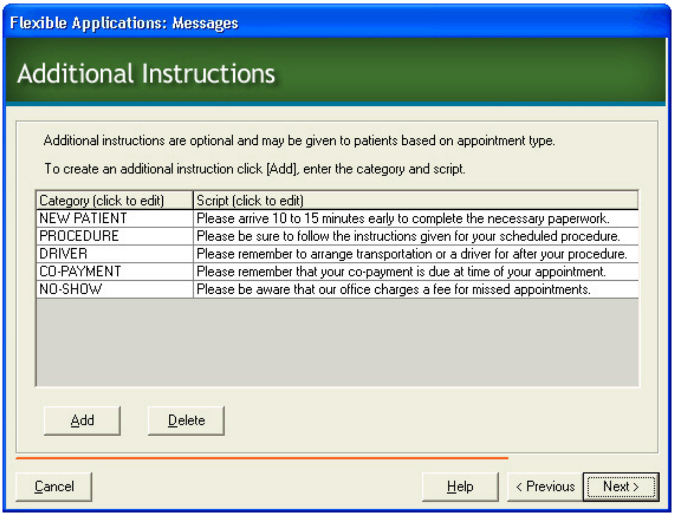
When finished, click **Next**.



Step Nine: Appointment Types

Similar to the Providers/Schedules step, these are all the Appointment Types that HealthWave detected after importing your data 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 messages), be sure to deselect them in this list.

When finished, click **Next**.

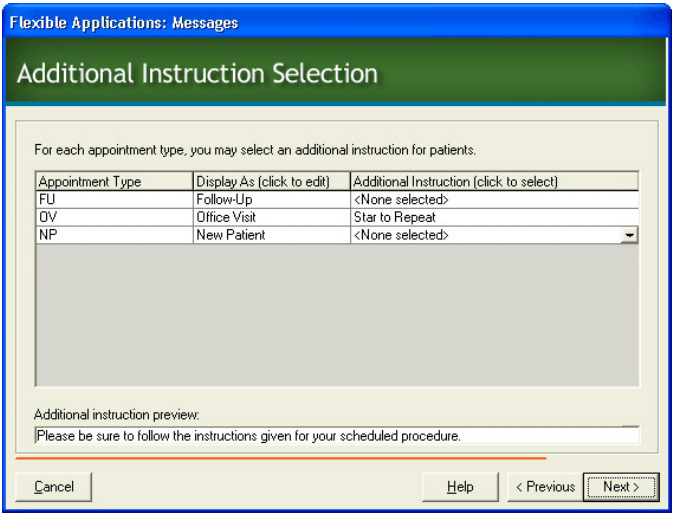


Step Ten: Additional Instructions

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.

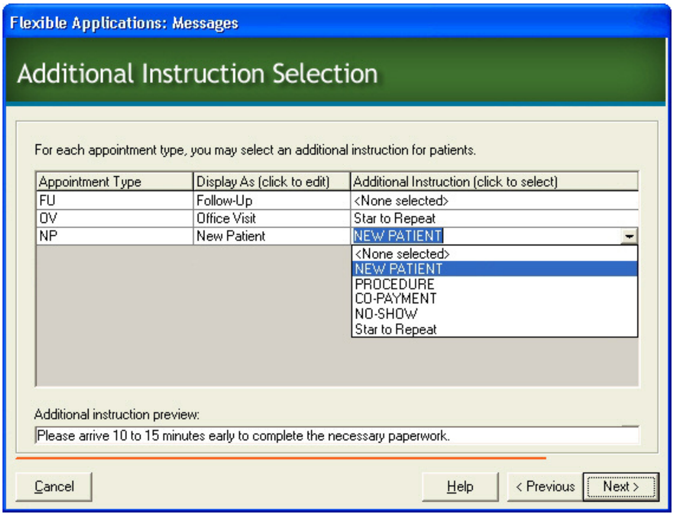
Note that each Appointment Type can have only one instruction message. Therefore, if you would like to combine one or more instruction messages, it would be necessary to create a new instruction message containing the desired information for both messages. For instance, if you want all the patients in 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 40).

When finished, click **Next**.



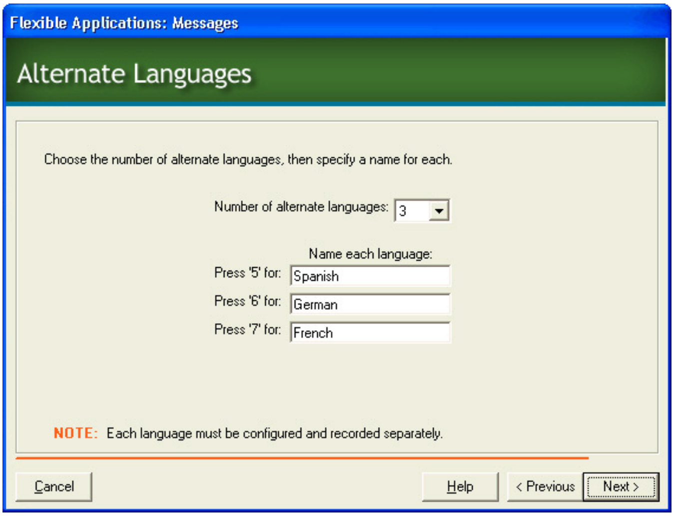
Step Eleven: Additional Instruction Selection

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**.



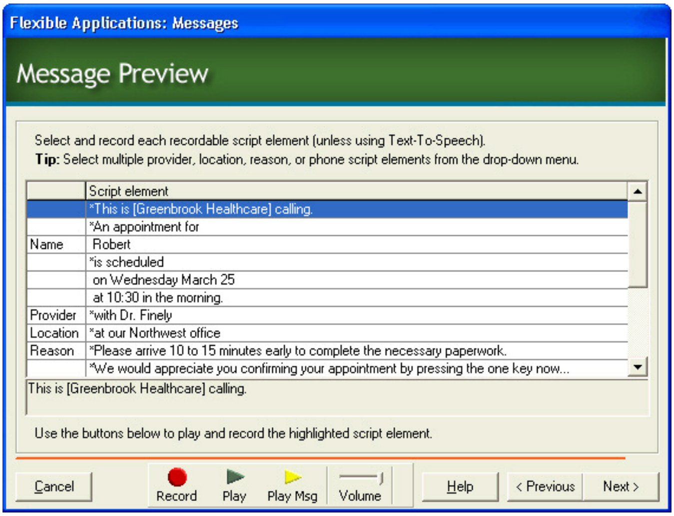
Step Twelve: Alternate Languages

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 42.

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**.

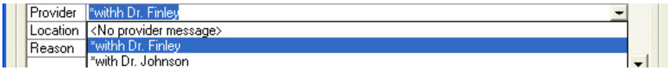
Configurations: Message: Message Preview



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 32), 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).

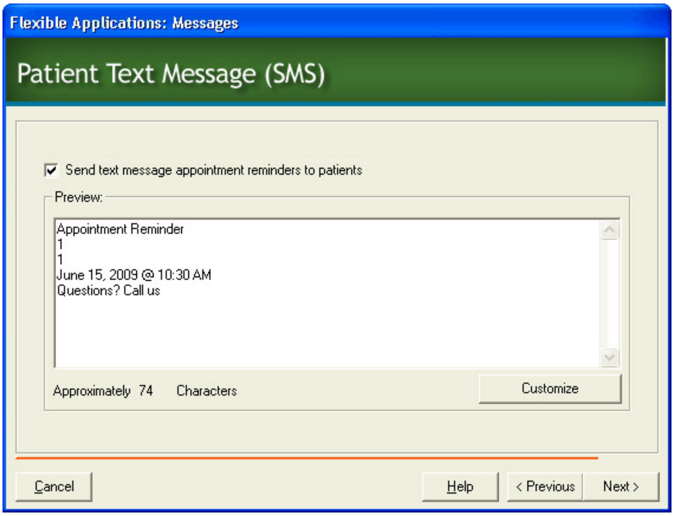


If you are using **Text-To-Speech** to announce your message, click **Play Msg** to review the message. Be sure to listen for any possible pronunciation issues that may need correcting.

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**.

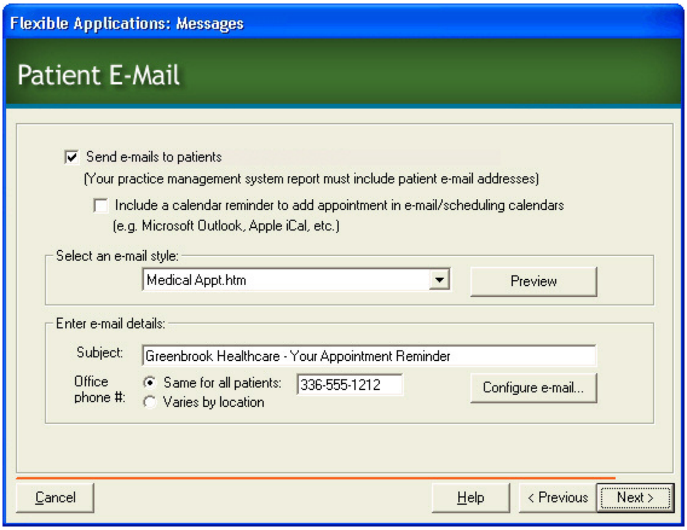
IMPORTANT: once a call has been answered, either by a person or an answering machine, it has a **maximum time limit of 2 minutes** *(subject to change)* **before the call will time out and disconnect**. Make sure that your message's total length, including any and all content such as the **Additional Instructions** option, ***does not exceed*** this time limit.



Step Fourteen: Patient Text Message (SMS)

Note: The Text Messaging (SMS) feature is only available if purchased as part of your account (see Account Registration on page 17 for more information). If the Account Registration screen shows this feature as "Inactive," this screen will not appear. To enable the ability to send text message notifications to your patients, please contact PhoneTree Healthcare Sales at **800.951.8733**.

In addition to calling and/or emailing your patients, HealthWave can also send text message notifications. To use this feature, HealthWave will require a cell or mobile phone number exported in the data file created by your practice management system. For more information, please contact PhoneTree Customer Support at **800.555.0559** or **hcsupport@phonetree.com**.

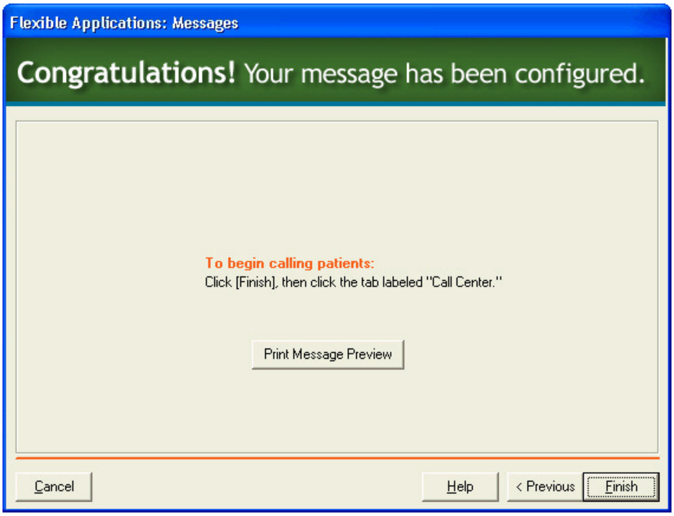


Step Fifteen: Patient E-Mail

HealthWave can send e-mail reminders to patients (if the patient e-mail was imported along with the other information in the data file) 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-mails 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 entered on page 37). Click **Configure E-Mail** if you didn't already during the Automatic Report setup process.

Click **Next**.

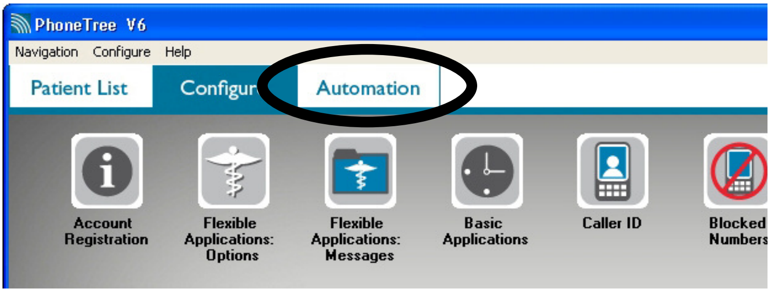


Step Sixteen: Confirmation

You've now successfully configured your application 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 48 for instructions on configuring alternate languages as part of your message.

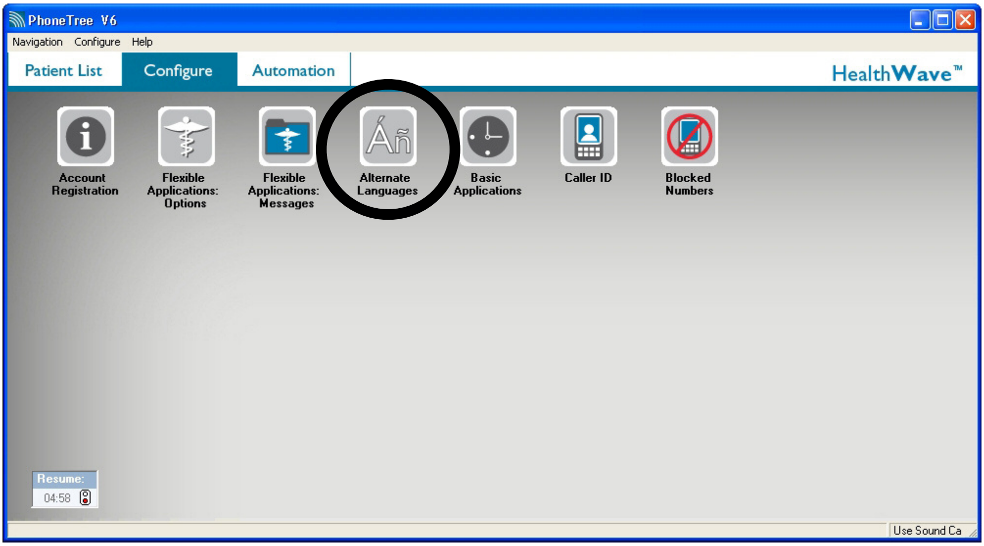
Note regarding Basic Applications: If you would like to configure HealthWave to use additional applications that use a simple message structure and exclude message variables such as Providers, Locations, Appointment Types, etc., please see page 54.



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

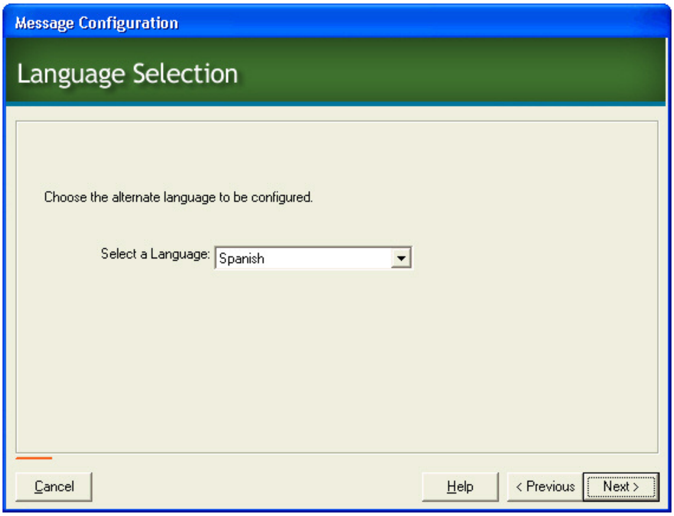
Notes

Configurations:
Alternate Languages



Step One: Launch the Alternate Languages Wizard

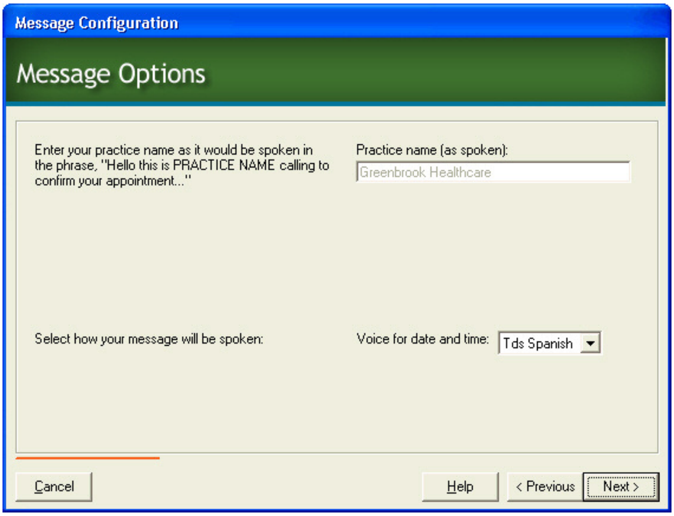
This Alternate Language icon appears if you chose the **Alternate Languages** option on the first **Message Options** screen of the **Flexible Applications: Message Wizard**. Unlike the English message, Alternate Languages does not have an option for Text-To-Speech and requires you to record your own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



Step Two: Language Selection

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

Click **Next**.

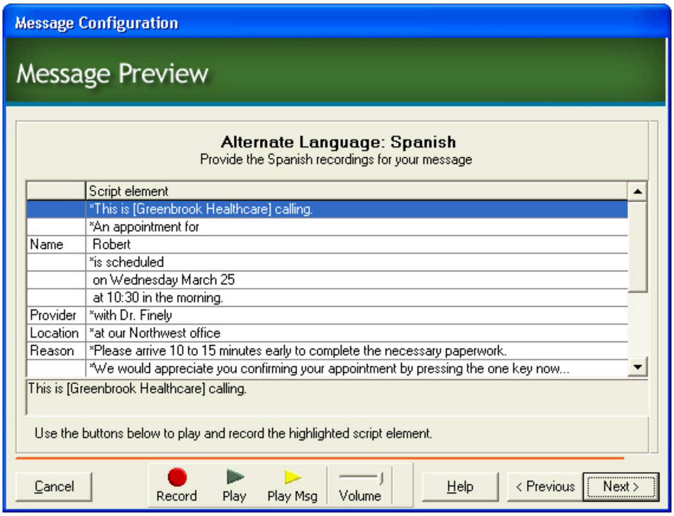


Step Three: Message Options

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 message created in the Flexible Applications: Message Wizard.

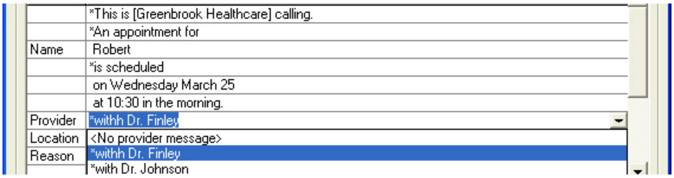
Unlike the Flexible message, Alternate Languages does not have an option for Text-To-Speech and requires you to record your own messages. Click the **Voice for date and time** drop-down box and select the prerecorded **Tds** (time-date stamp) that matches the language you are about to record.

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.

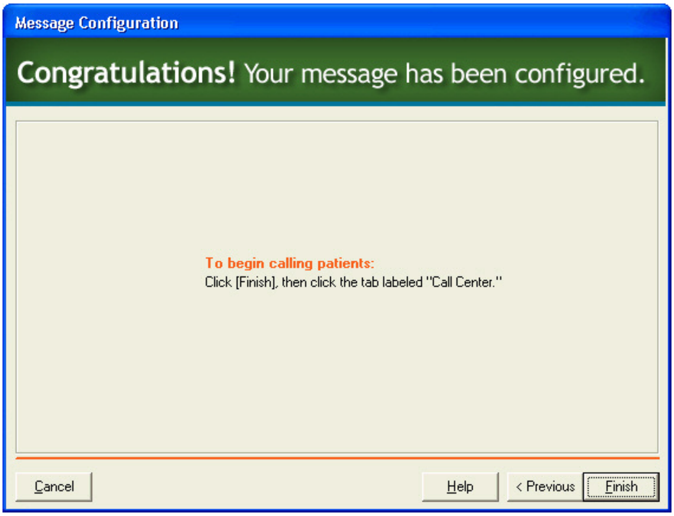


To review the script element you just recorded, click **Play**. To review the message in its entirety, click **Play Msg**. Use the **Volume** slider to control the volume of your message for playback on this screen only (changing this will have no effect on the volume of the message as heard by your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

IMPORTANT: once a call has been answered, either by a person or an answering machine, it has a **maximum time limit of 2 minutes** *(subject to change)* **before the call will timeout and disconnect**. Make sure that your message's total length, including any and all content such as the **Additional Instructions** option, ***does not exceed*** this time limit.

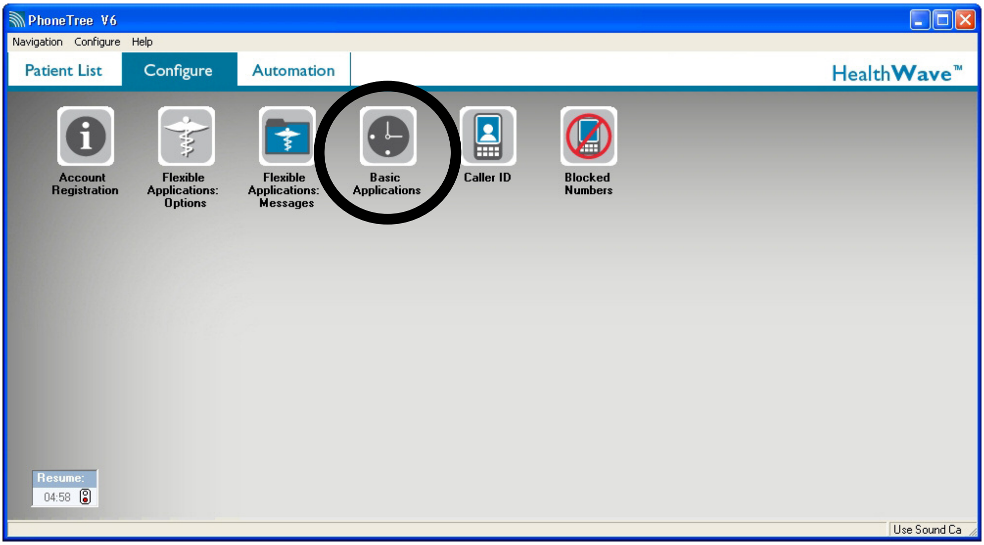


Step Five: Confirmation

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

Note regarding Basic Applications: If you would like to configure HealthWave to use additional applications that use a simple message structure and exclude message variables such as Providers, Locations, Appointment Types, etc., please see page 54.

Configurations:
Basic Applications

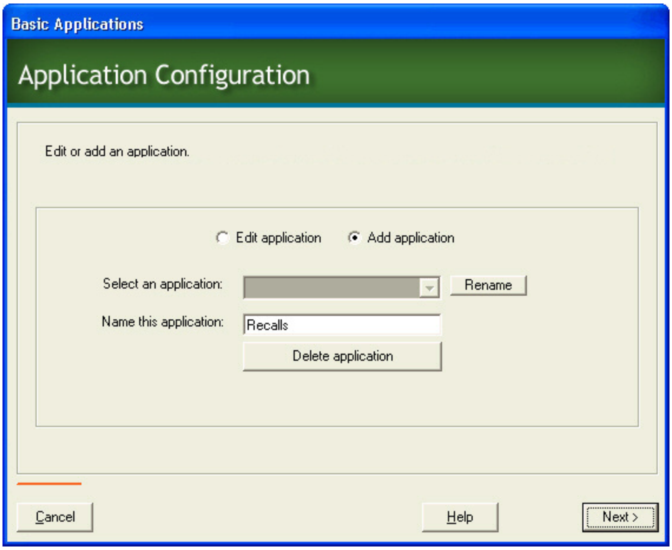


Step One: Launch the Basic Applications Wizard

In addition to making appointment reminder calls, you can also set HealthWave to call for other basic applications such as Recalls, Reschedules or Collections which usually don't need to include individual Provider, Location, Appointment Type, etc. information. If you would like to create an additional application, click the **Basic Applications** icon.

Note: *Unlike Flexible Applications, Basic 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.

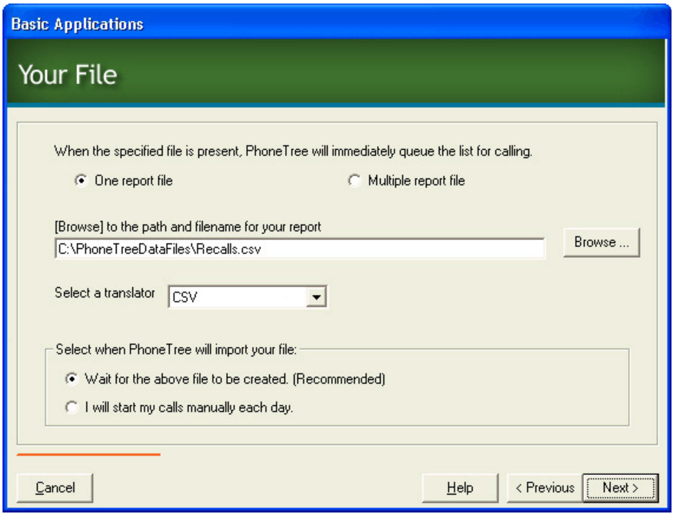
The file format you will use for any basic application must be in one of two different file formats: **CSV** or **the same format of your Flexible Application file**. To help keep your set up simple, it is recommended that you save your other file(s) in the same location as your Flexible Application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



Step Two: Application Configuration

First you must create an application. Choose **Add application** and then in the **Name this 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 **Select an 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 Flexible Application 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 data file.

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

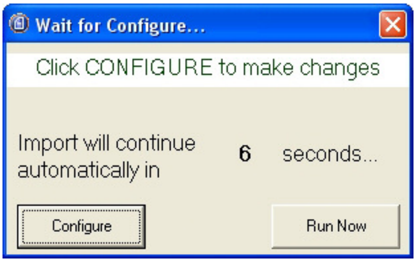
a) **Wait for the above file to be created each day** (Recommended) We suggest this option, because as soon as your daily report appears in the above location, HealthWave will automatically read the file and use it to start calls during your desired calling window. Note that this choice is not available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

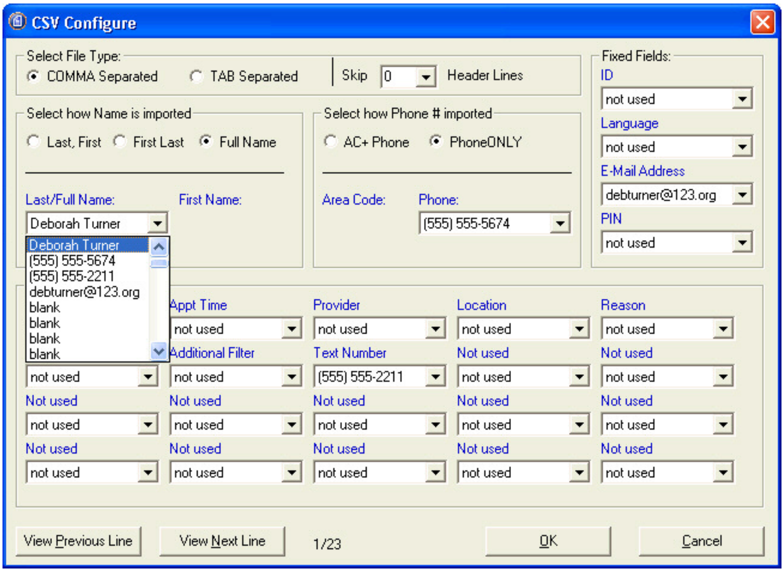
Click **Next**.

Step Four: Configure CSV File

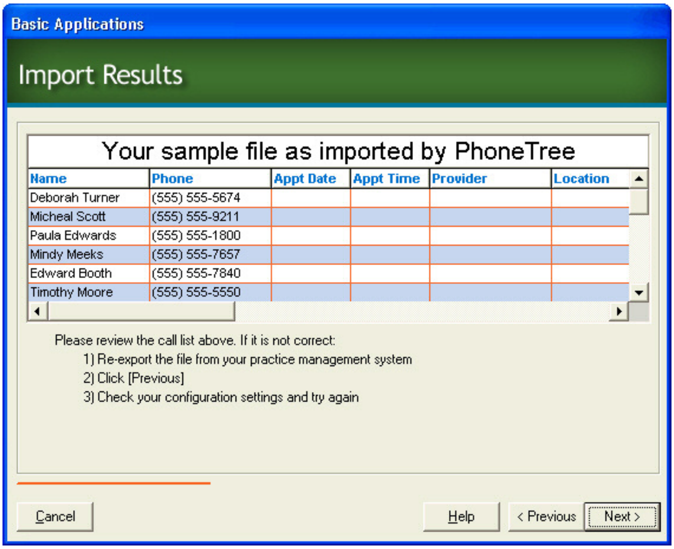
If you chose **CSV** as your translator, this screen will appear. Click the **Configure** button. **Note:** If you chose the same translator you used for your Flexible Applications file, continue to page 58.



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**.

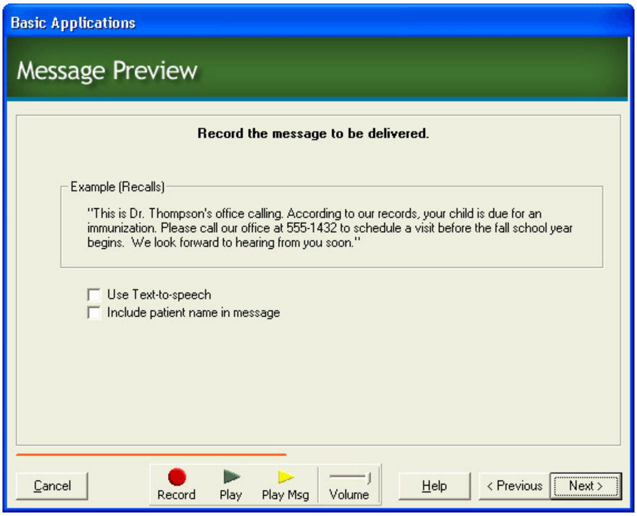


Step Five: Import Results

After your file has finished importing, by either the CSV or same translator you used for your Flexible Applications 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 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

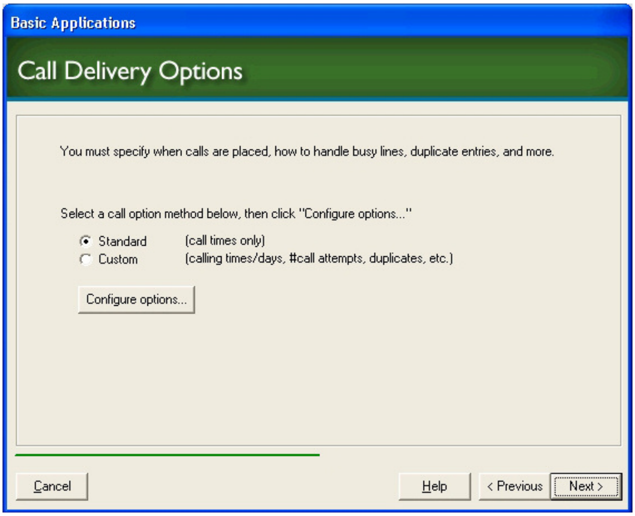
To record a message, click **Record**. To review your recording, click **Play**. The **Volume** control only changes the level of playback in your headphones and does not affect how loud the message is played to the patient during a phone call.

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**.

IMPORTANT: once a call has been answered, either by a person or an answering machine, it has a **maximum time limit of 2 minutes** *(subject to change)* **before the call will timeout and disconnect**. Make sure that your message's total length, including any and all content such as the **Additional Instructions** option, ***does not exceed*** this time limit.

When finished, click **Next**.



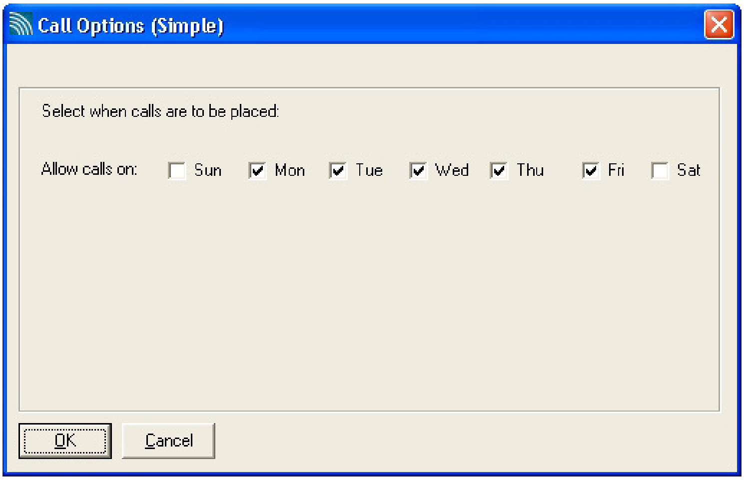
Step Seven: Call Delivery Options

Here, you will be able to specify how you want HealthWave to handle multiple entries 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.

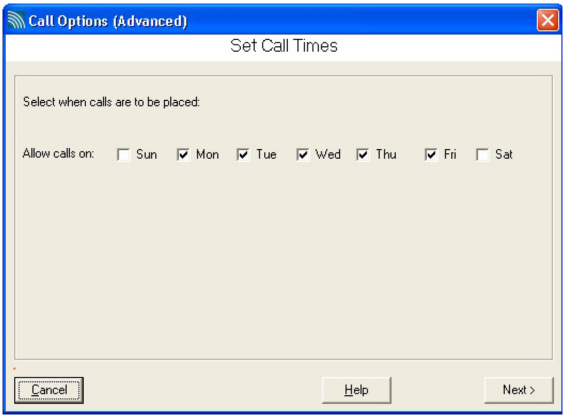
Choose **Custom** if you want the call window to vary from day to day and/or you want control over other HealthWave calling options.

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



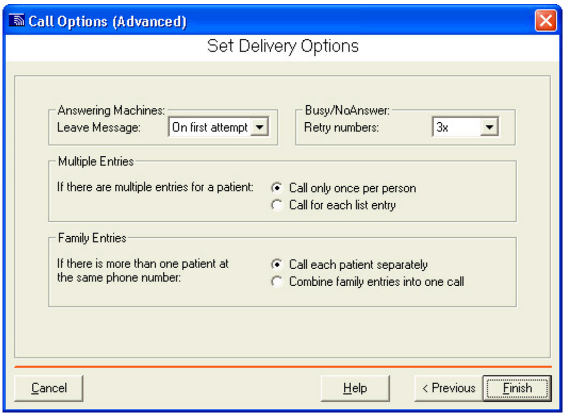
Simple Method

De-select any days that HealthWave should not send messages on (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 report file** (see page 56), calls may not begin until your data file appears. Click **OK**.



Custom Method

On this first screen, de-select any days that HealthWave should not send messages on (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 report file** (see page 56), calls may not begin until your data file appears. Click **Next**.



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**.

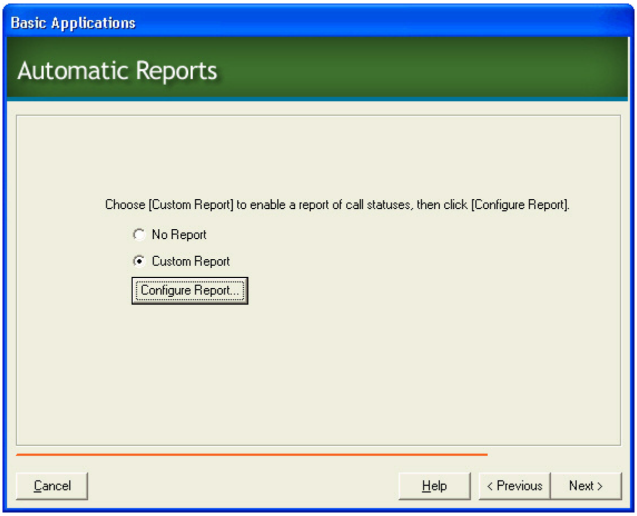
b) **Busy/No Answer**: Select the number of retries HealthWave makes to a busy or unanswered phone number. Once all retries have been exhausted, no further attempts will be made to that phone number for that call job. Choose from **3**-**8** retries.

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 59) of the Basic Applications wizard.

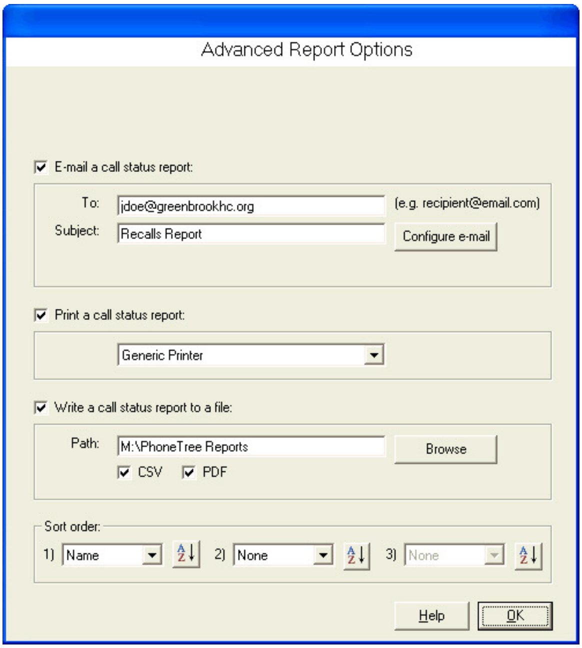
When finished making changes to these settings, click the **Finish** button.

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** and then click **Configure Report**.



Enter your practice's name in the **Practice name to appear...** box. Change the **Create report each day at** time if needed. Next, choose how you would like to receive your Automatic Reports:

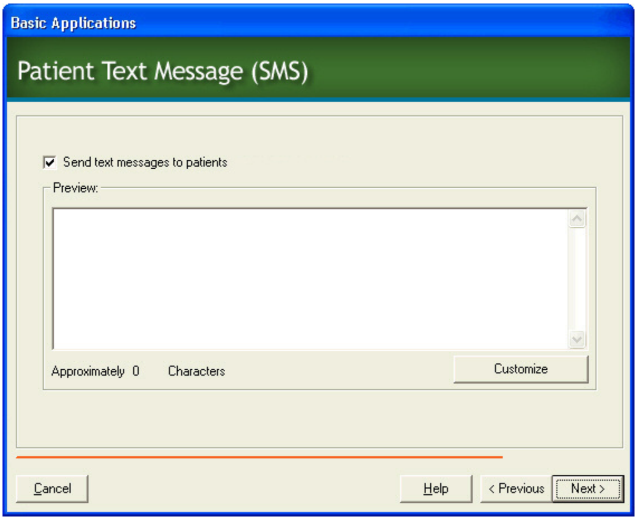
E-mail: Select **E-mail a call status report**. Then, enter the appropriate information in the **To** and **Subject** boxes (you can send this report to multiple addresses by separating them with a comma in the **To** box). Then click **Configure E-Mail** (see pages 27-28 for configuration instructions).

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**.

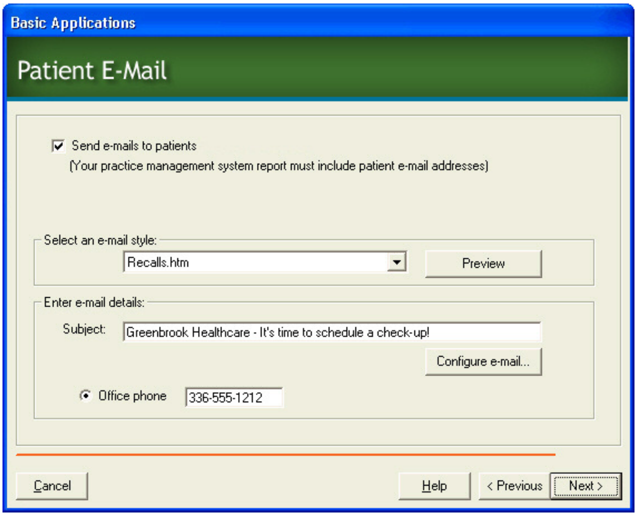
Click **OK**, then click **Next**.



Step Nine: Patient Text Message (SMS)

Note: The Text Messaging (SMS) feature is only available if purchased as part of your account (see Account Registration on page 17 for more information). If the Account Registration screen shows this feature as "Inactive," this screen will not appear. To enable the ability to send text message notifications to your patients, please contact PhoneTree Healthcare Sales at **800.951.8733**.

In addition to calling and/or emailing your patients, HealthWave can also send text message notifications. To use this feature, HealthWave will require a cell or mobile phone number exported in the data file created by your practice management system. For more information, please contact PhoneTree Customer Support at **800.555.0559** or **hcsupport@phonetree.com**.

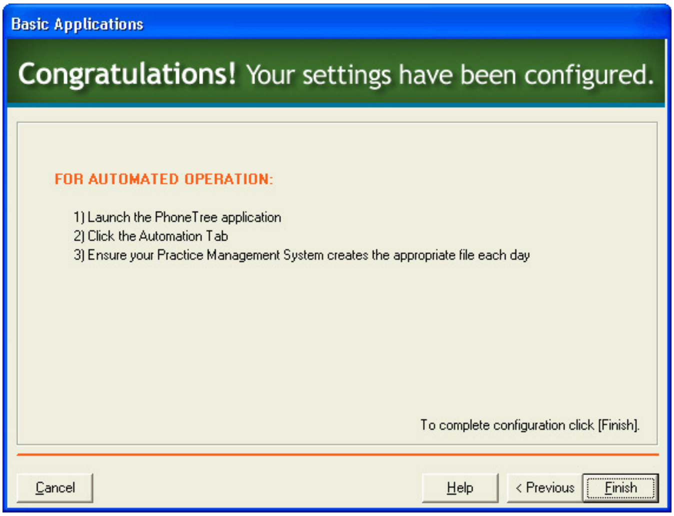


Step Ten: Patient E-Mail

HealthWave can send e-mail reminders to patients (if the patient e-mail was imported along with the other information in the data file) 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 **Configure E-Mail** if you didn't during the Automatic Report setup process.

When you are finished, click **Next**.



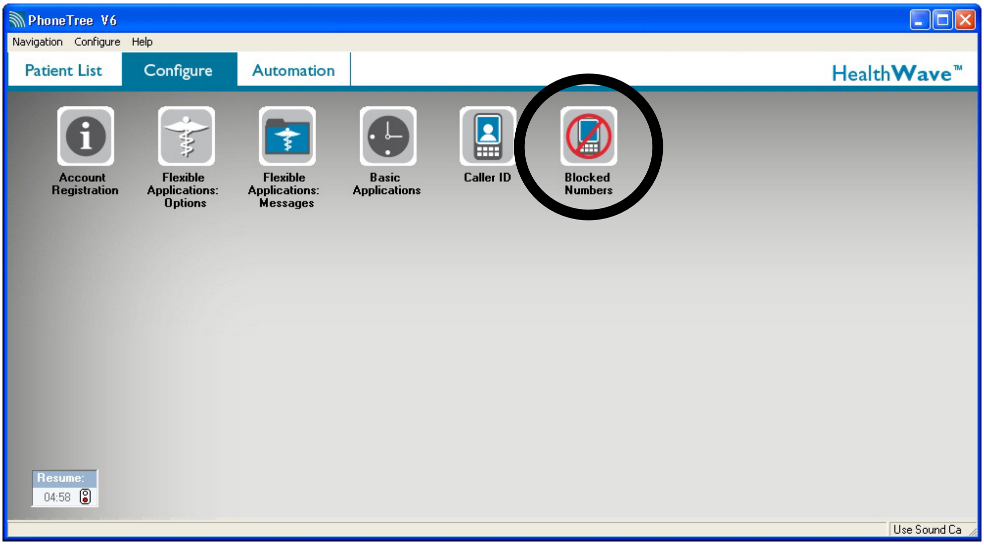
Step Eleven: Confirmation

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

Configurations:

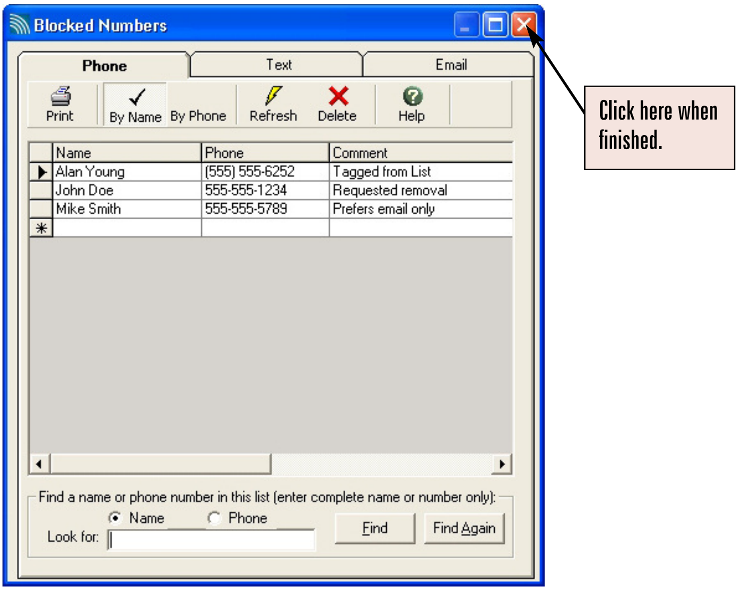
Blocking Numbers and Email Addresses

Configurations: Blocking Numbers and Email Addresses



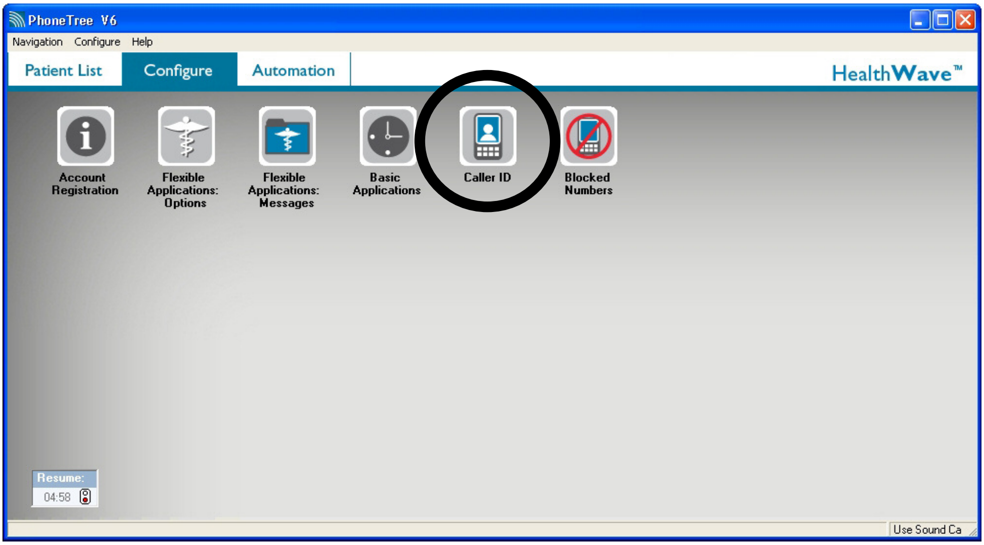
Blocking Numbers and Email Addresses

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



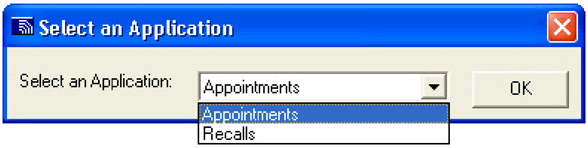
If you have a phone number, text number and/or email address that the HealthWave system should never contact, you can add it to the Blocked Numbers database. To block a person's number or email address, select the form of contact you wish to block, and then enter the person’s name and contact information in the corresponding fields. To keep a record of why a person was blocked, enter that information in the **Comment** field (optional). To resume contacting a number or email address, click on the entry you wish to remove, and then click **Delete**.

Configurations:
Caller ID



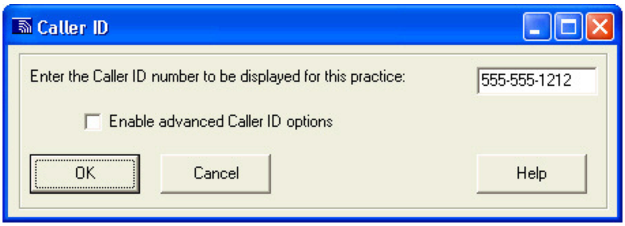
Providing Caller ID

The Caller ID feature allows you to control which phone number will appear on Caller ID when HealthWave calls your patients. You can choose to display your practice's main phone number or display a phone number based on a Provider, Office Location, or Appointment Type. To begin, click the **Caller ID** icon.



To add a Caller ID number, select an application from the drop-down menu and click **OK**.

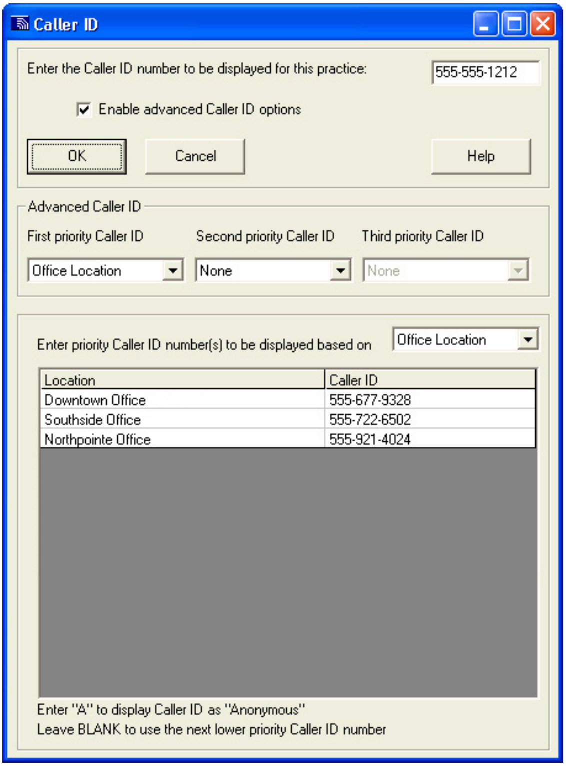
Flexible Applications



1. Enter the phone number to be displayed for your practice, including the area code and dashes, in the box provided. When finished, click **OK**.

   To display a Caller ID number based on the patient's Provider, Office Location, or Appointment Type, click **Enable advanced Caller ID options** (Flexible Applications only) and see step 2.

2. The Advanced Caller ID feature allows you to specify the Caller ID phone number based on the patient's Provider, Office Location, or Appointment Type and, if desired, rank those fields by importance.



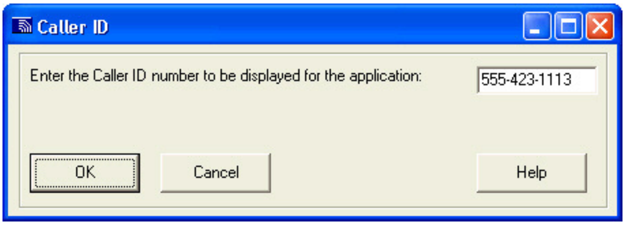
To display a Caller ID number based on Office Location, set the **First priority Caller ID** drop-down menu to **Office Location**. Then, in the **Caller ID** column below, enter the phone number to be displayed, including the area code and dashes, for each Office Location. Now, when HealthWave calls each patient, it will display the phone number for the Office Location associated with their appointment. When finished, click **OK**.

Additional Caller ID configurations can be accomplished by using more than one priority and arranging the fields, **Provider**, **Office Location**, and **Appointment Type**, in an order that is important to your practice.

Anonymous Caller ID

If your practice uses sensitive Appointment Types that should not display a Caller ID number due to patient privacy (i.e., testing, treatments, etc.), set the **First priority** to **Appointment Type** and **Second priority** to **Office Location**. Then, for each sensitive Appointment Type, enter the letter "A" in the **Caller ID** column to display an Anonymous ID ("Unavailable," "Unknown Caller," etc.) instead of a phone number. Leave the remaining Appointment Types blank to skip to the **Second priority** and use the Caller ID number for the patient's **Office Location** instead.

Basic Applications



Enter the phone number to be displayed for this application, including the area code and dashes, in the box provided. When finished, click **OK**. Repeat for each additional application.

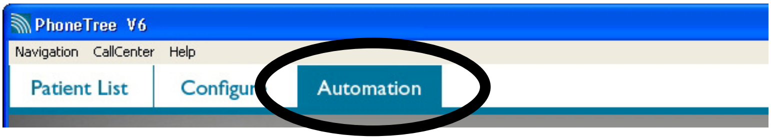
Daily Operation

Daily Operation: Ensuring Automatic Operation

If you followed the Configuration Steps (and chose option A or B on page 20), 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:

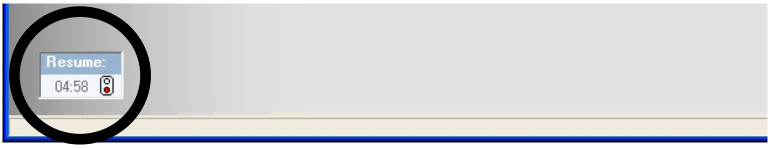
1) Internet connection is working
2) HealthWave PC *must* be on
3) HealthWave software *must* be running
4) HealthWave software *must* be left in the **Automation** screen (see below)
5) Your practice management data file *must* be present each day in the location you specified on pages 20 and 56 (if using Basic Applications).

Suggestions for ensuring that HealthWave makes your calls each day would be to connect the 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 1-5 above are met, HealthWave will start calling your patients automatically.

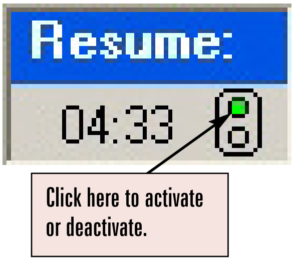


To put HealthWave in the Automation Center, click the **Automation** tab. The Automation Center will then launch, and you can monitor your calls in progress.

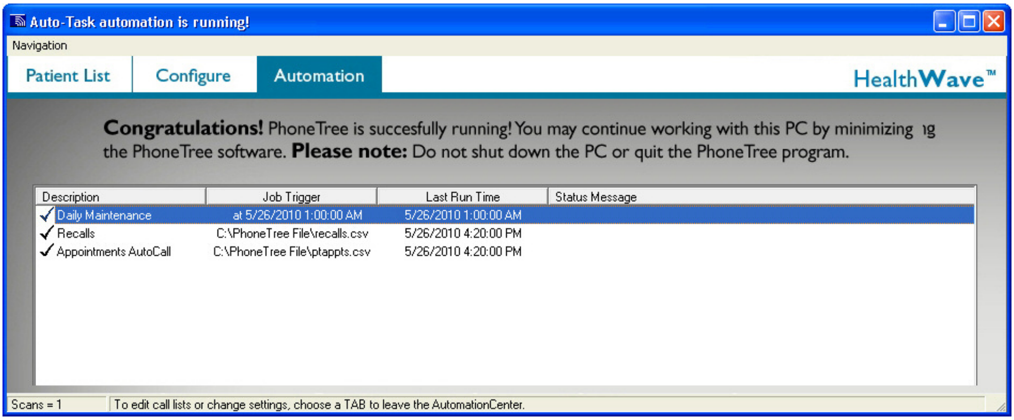
The AutoResume Timer



Appearing on each desktop of the HealthWave software is the **Auto Resume Timer**, which will automatically relaunch the Automation Center after the time elapsed on its counter (each time you exit the Automation Center, the timer is reset to 5 minutes). So, when the counter reaches 00:00, the software will return the Automation mode. This is a built-in safeguard so that Automation is always running, even if you forget to leave the software in the Automation Center.



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.



Submitting Calls

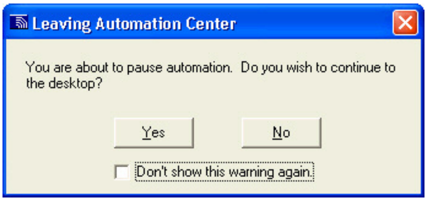
This is the HealthWave **Automation Center**. This is the ***only*** screen where it is possible for HealthWave to make calls. Here, you can monitor when each application will run:

a. 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 next run. Each of these were programmed when you completed the Flexible Applications: Options and/or Basic Application 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.

b. 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.

c. 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.

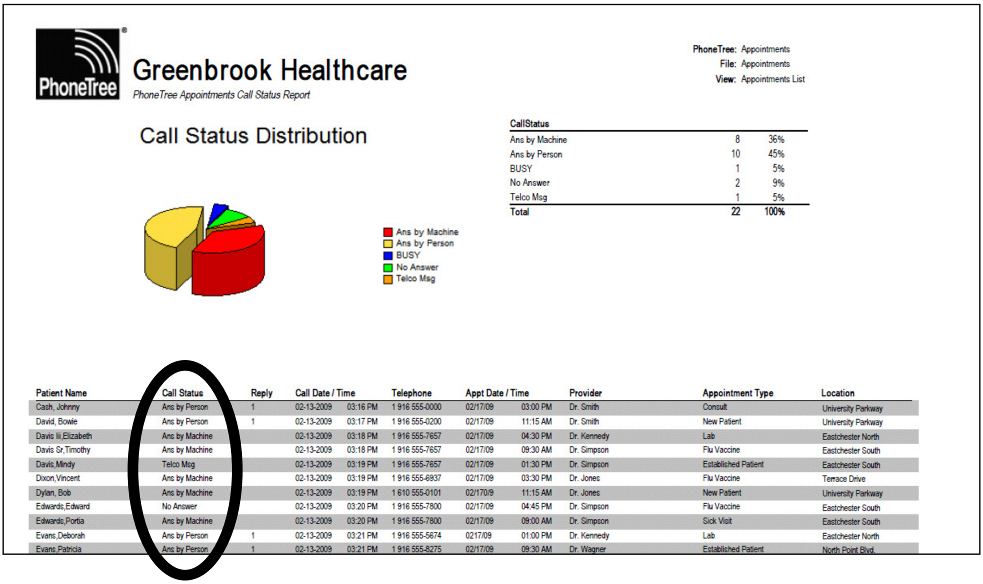
Any time you wish to leave the Automation Center (to make changes to your configuration, manually print a call status report, or other non-calling activity), click the **X** in the top right corner, then click **Yes** on the following message box:



…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 Automation 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.



PhoneTree

Greenbrook Healthcare

PhoneTree Appointments Call Status Report

PhoneTree: Appointments
File: Appointments
View: Appointments List

Call Status Distribution

CallStatus		
Ans by Machine	8	36%
Ans by Person	10	45%
BUSY	1	5%
No Answer	2	9%
Telco Msg	1	5%
Total	**22**	**100%**

Patient Name	Call Status	Reply	Call Date / Time		Telephone	Appt Date / Time		Provider	Appointment Type	Location
Cash, Johnny	Ans by Person	1	02-13-2009	03:16 PM	1 916 555-0000	02/17/09	03:00 PM	Dr. Smith	Consult	University Parkway
David, Bowie	Ans by Person	1	02-13-2009	03:17 PM	1 916 555-0200	02/17/09	11:15 AM	Dr. Smith	New Patient	University Parkway
Davis Iii,Elizabeth	Ans by Machine		02-13-2009	03:18 PM	1 916 555-7657	02/17/09	04:30 PM	Dr. Kennedy	Lab	Eastchester North
Davis Sr,Timothy	Ans by Machine		02-13-2009	03:18 PM	1 916 555-7657	02/17/09	09:30 AM	Dr. Simpson	Flu Vaccine	Eastchester South
Davis,Mindy	Telco Msg		02-13-2009	03:19 PM	1 916 555-7657	02/17/09	01:30 PM	Dr. Simpson	Established Patient	Eastchester South
Dixon,Vincent	Ans by Machine		02-13-2009	03:19 PM	1 916 555-6937	02/17/09	03:30 PM	Dr. Jones	Flu Vaccine	Terrace Drive
Dylan, Bob	Ans by Machine		02-13-2009	03:19 PM	1 610 555-0101	02/170/9	11:15 AM	Dr. Jones	New Patient	University Parkway
Edwards,Edward	No Answer		02-13-2009	03:20 PM	1 916 555-7800	02/17/09	04:45 PM	Dr. Simpson	Flu Vaccine	Eastchester South
Edwards,Portia	Ans by Machine		02-13-2009	03:20 PM	1 916 555-7800	02/17/09	09:00 AM	Dr. Simpson	Sick Visit	Eastchester South
Evans,Deborah	Ans by Person	1	02-13-2009	03:21 PM	1 916 555-5674	0217/09	01:00 PM	Dr. Kennedy	Lab	Eastchester North
Evans,Patricia	Ans by Person	1	02-13-2009	03:21 PM	1 916 555-8275	02/17/09	09:30 AM	Dr. Wagner	Established Patient	North Point Blvd.

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
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
OnDemand call	Call was submitted to PhoneTree OnDemand servers

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 received an e-mail from PhoneTree stating "PhoneTree has detected new items!" What does this mean and what should I do?

A. If you configured your system for automation [following the guidelines on page 74] HealthWave will import your file each day and build messages based on the choices you made in the configuration wizards on the Configure tab.

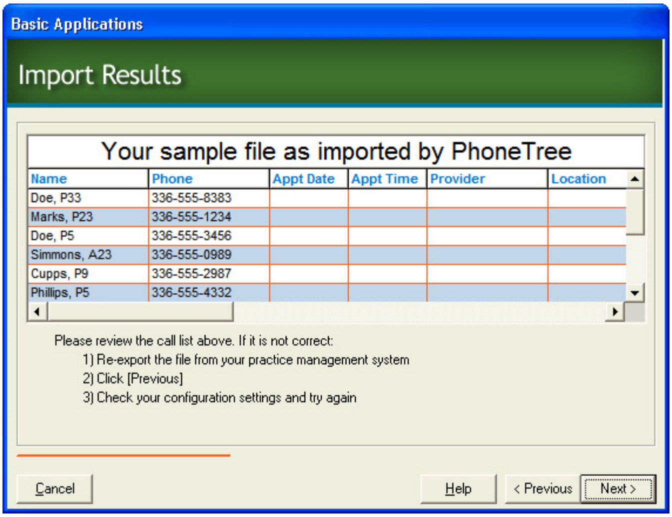
If HealthWave detects new providers, locations and/or appointment types in your file after import, you will receive an e-mail from us saying ***"PhoneTree has detected new items!"*** This is your cue that a new provider, location or appointment type is being imported along with the other data in your file, but HealthWave needs to know how to identify and handle the new item(s). The e-mail will list the new items and instructions on how to add new items to your HealthWave system.

It is recommended that you check your e-mail 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 into HealthWave 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.



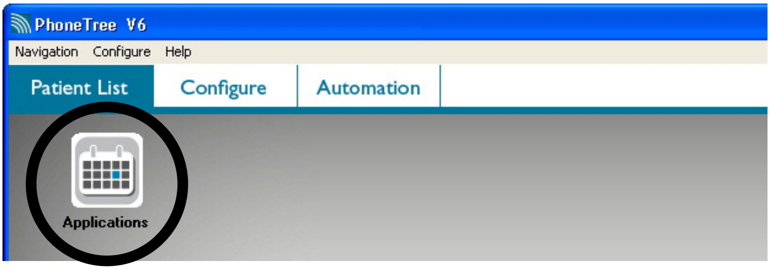
To remedy the problem, recreate the file and double check the file's format by opening it with Notepad. It will be easy to check a CSV file format but a PMS file format might be more difficult to understand. If the file's data looks correct, try importing it again and check your results. If you still have an issue with importing the file correctly, please contact PhoneTree Customer Support.

Appendices

Checking Call Status

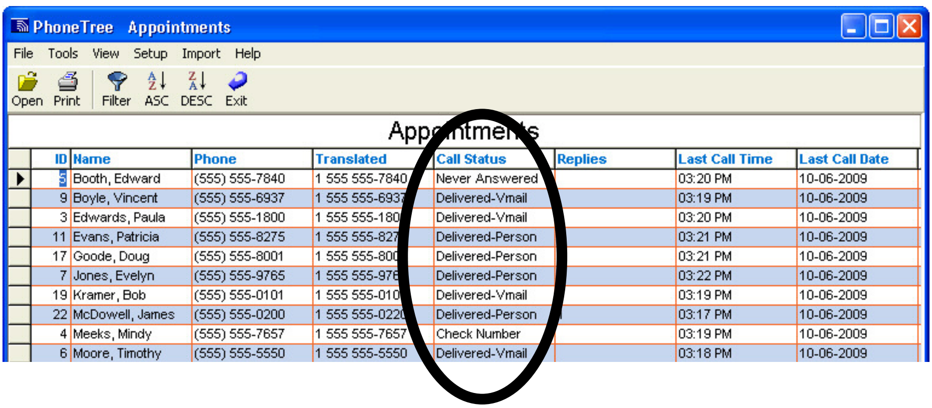
You have the ability to check the call status of Flexible or Basic Applications once your file information has been submitted to our servers. During that time, you can check the progress of your message job and once the message job is complete, see the individual statuses for each patient. **Note:** Most jobs are started within minutes of submission, but during peak times, you may experience a slight delay.

If you followed the instructions for an Automatic Report (see pages 26 or 62), a report containing the statuses will be generated each day, either as an e-mail with a Word attachment or as a printout to the printer you specified. However, you can manually check the status also, and print a report (see page 87). Here's how to do this:



Click on the **Patient List** tab, and then click on the **Applications** icon. From the drop-down menu that appears, select your desired application, and then click **OK**.

If your call job has already completed, you will receive this message. Click **OK** to view the call statuses for each patient (see below). If you do not see this message, your call job may still be in the process of being called. See page 85 for information about checking the progress of your call job.

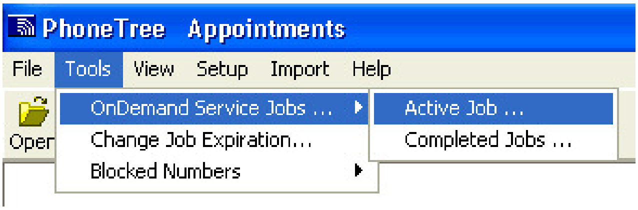


ID	Name	Phone	Translated	Call Status	Replies	Last Call Time	Last Call Date
5	Booth, Edward	(555) 555-7840	1 555 555-7840	Never Answered		03:20 PM	10-06-2009
9	Boyle, Vincent	(555) 555-6937	1 555 555-6937	Delivered-Vmail		03:19 PM	10-06-2009
3	Edwards, Paula	(555) 555-1800	1 555 555-180	Delivered-Vmail		03:20 PM	10-06-2009
11	Evans, Patricia	(555) 555-8275	1 555 555-827	Delivered-Person		03:21 PM	10-06-2009
17	Goode, Doug	(555) 555-8001	1 555 555-800	Delivered-Person		03:21 PM	10-06-2009
7	Jones, Evelyn	(555) 555-9765	1 555 555-976	Delivered-Person		03:22 PM	10-06-2009
19	Kramer, Bob	(555) 555-0101	1 555 555-010	Delivered-Vmail		03:19 PM	10-06-2009
22	McDowell, James	(555) 555-0200	1 555 555-0220	Delivered-Person		03:17 PM	10-06-2009
4	Meeks, Mindy	(555) 555-7657	1 555 555-7657	Check Number		03:19 PM	10-06-2009
6	Moore, Timothy	(555) 555-5550	1 555 555-5550	Delivered-Vmail		03:18 PM	10-06-2009

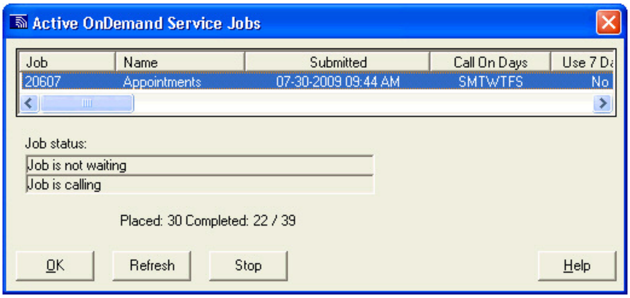
This screen is the Patient **List Viewer** for Appointments. You can check call statuses for each patient on-screen by noting the contents of the Call Status column. Please see pages 76-77 for a list of common call statuses and their meanings.

Active Job

If after you select an application and do not see the finished results of your call job, it may still be in the process of being called on our servers. Here's how to track your call job's progress:



At the top of the screen, click **Tools** › **OnDemand Service Jobs...** › **Active Job...**.



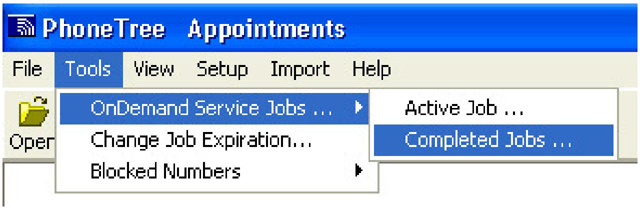
The **Active OnDemand Service Jobs** screen will appear. If your call job has been submitted and is waiting to be called or is currently being called, you will see this screen.

In this example, the **Job Status** says "Job is not waiting/Job is calling." This means that the OnDemand servers are currently working on placing calls. During peak times, you may experience a slight delay with your call job starting. If such a delay has taken place, your Job Status will show "Job is waiting/Job is not calling." To check if your status has changed, click **Refresh**.

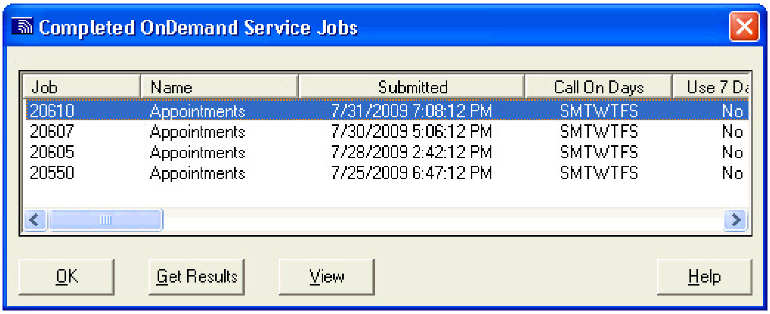
Below the Job Status information, the number of **Placed** and **Completed** calls made thus far will be displayed. The **Placed** number refers to the total number of calls that have been placed while calling the **Completed** number displays how many patients, out of the total to be contacted, that have been contacted so far. **Note:** The Placed number will always show a higher number than the Completed number due to OnDemand retrying phone numbers that gave a busy signal or had no answer. To update the results, click **Refresh**.

Once a call job has been completed, it will no longer appear under the Active Jobs category. Instead, to view finished call jobs, choose Completed Jobs (see page 86).

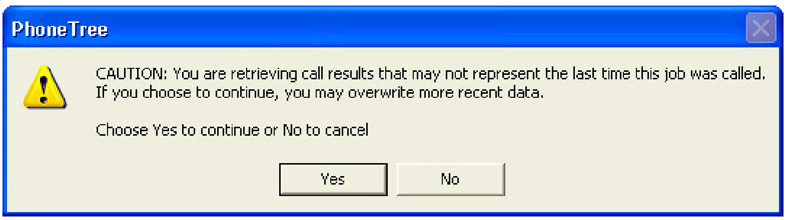
Completed Job



To access your completed call jobs, click **Tools** › **OnDemand Service Jobs...** › **Completed Jobs...**.



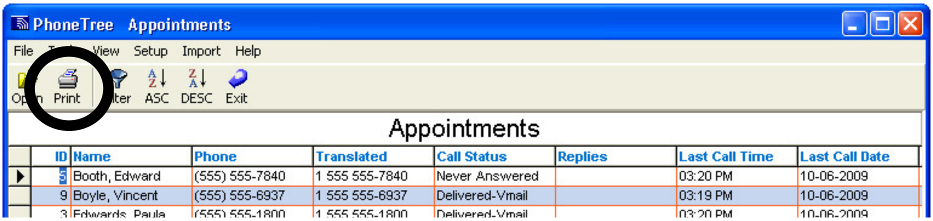
To view the details of any call job, click to highlight that job and then click **View**. A window will appear showing you the details of each call made. If you want to print a past call job, click **Get Results** and the following message will appear:



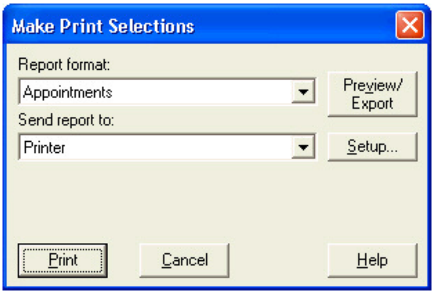
To display the call job information you have selected, click **Yes**. Understand that clicking **Yes** will overwrite the current job being displayed. If you would like to go back and retrieve the current job after viewing a different job, be sure to note the date of the calls and repeat these steps.

Manually Printing a Call Job

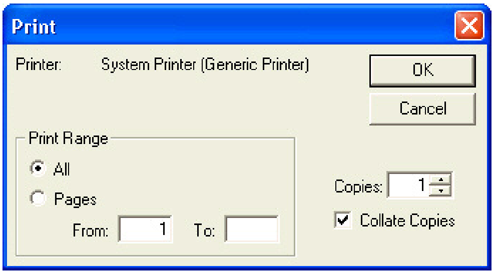
In addition to checking call statuses on screen, you may Print a report manually. To do this:



a) Click **Print** in the toolbar



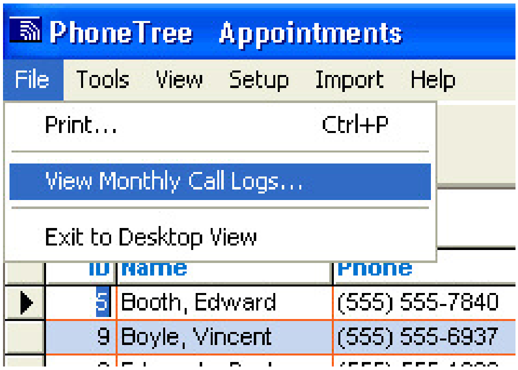
b) Choose **Appointments** (or other available report) from the **Report format** drop-down menu, then choose **Printer** from the **Send report to** drop-down menu. Then click **Print**.



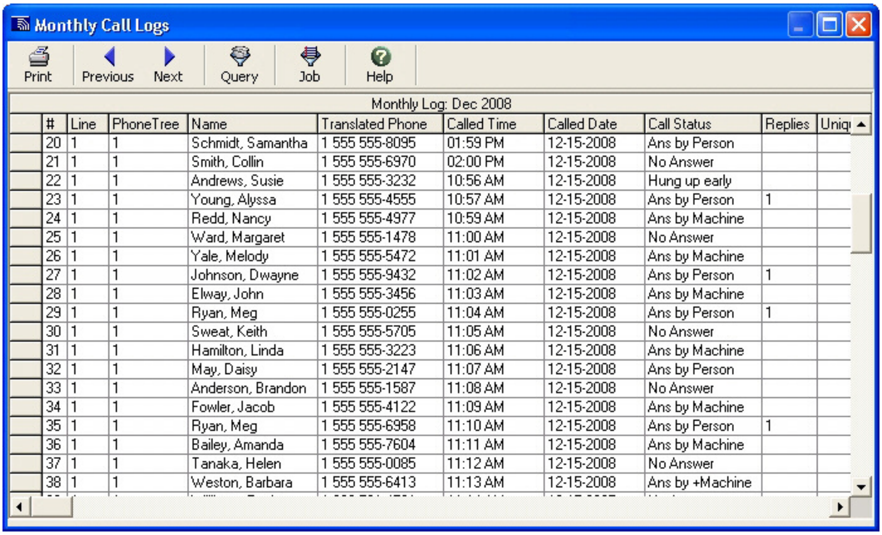
c) Make the appropriate choices on the **Print** dialog box (the report will be printed to the HealthWave computer's default printer), and click **OK**.

Using the Call Logs

You may also want to look up the results of a calling job from days, weeks or months ago.



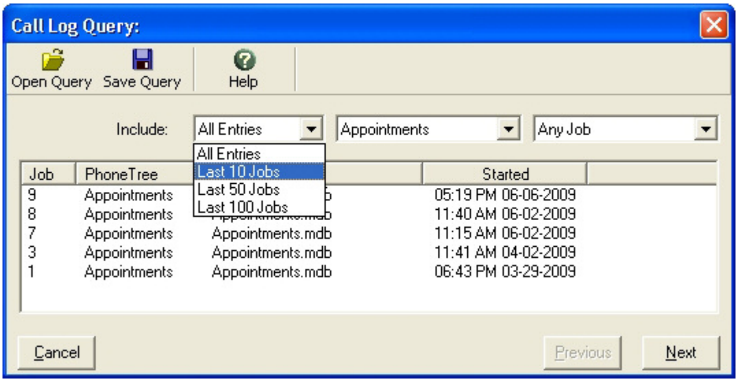
From the **File** menu, choose **View Monthly Call Logs…**



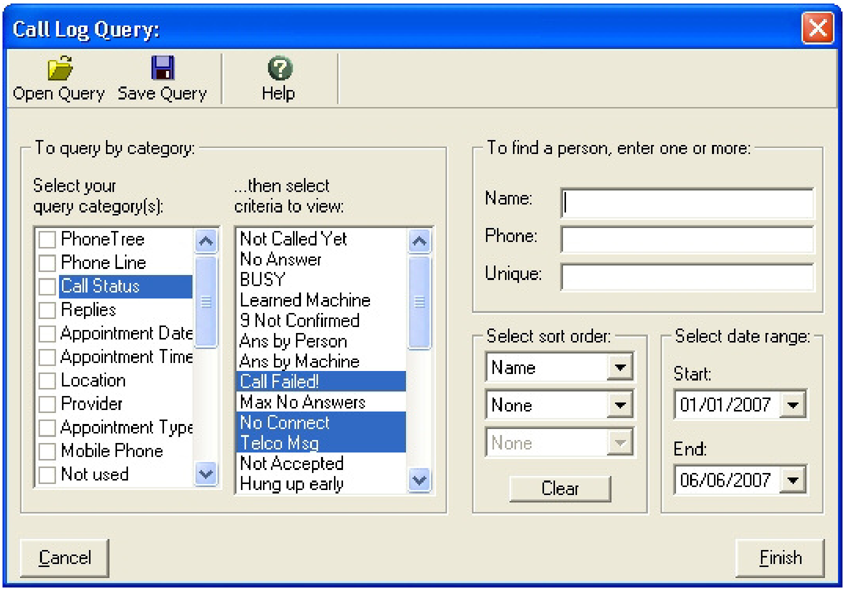
#	Line	PhoneTree	Name	Translated Phone	Called Time	Called Date	Call Status	Replies	Uniq
20	1	1	Schmidt, Samantha	1 555 555-8095	01:59 PM	12-15-2008	Ans by Person		
21	1	1	Smith, Collin	1 555 555-6970	02:00 PM	12-15-2008	No Answer		
22	1	1	Andrews, Susie	1 555 555-3232	10:56 AM	12-15-2008	Hung up early		
23	1	1	Young, Alyssa	1 555 555-4555	10:57 AM	12-15-2008	Ans by Person	1	
24	1	1	Redd, Nancy	1 555 555-4977	10:59 AM	12-15-2008	Ans by Machine		
25	1	1	Ward, Margaret	1 555 555-1478	11:00 AM	12-15-2008	No Answer		
26	1	1	Yale, Melody	1 555 555-5472	11:01 AM	12-15-2008	Ans by Machine		
27	1	1	Johnson, Dwayne	1 555 555-9432	11:02 AM	12-15-2008	Ans by Person	1	
28	1	1	Elway, John	1 555 555-3456	11:03 AM	12-15-2008	Ans by Machine		
29	1	1	Ryan, Meg	1 555 555-0255	11:04 AM	12-15-2008	Ans by Person	1	
30	1	1	Sweat, Keith	1 555 555-5705	11:05 AM	12-15-2008	No Answer		
31	1	1	Hamilton, Linda	1 555 555-3223	11:06 AM	12-15-2008	Ans by Machine		
32	1	1	May, Daisy	1 555 555-2147	11:07 AM	12-15-2008	Ans by Person		
33	1	1	Anderson, Brandon	1 555 555-1587	11:08 AM	12-15-2008	No Answer		
34	1	1	Fowler, Jacob	1 555 555-4122	11:09 AM	12-15-2008	Ans by Machine		
35	1	1	Ryan, Meg	1 555 555-6958	11:10 AM	12-15-2008	Ans by Person	1	
36	1	1	Bailey, Amanda	1 555 555-7604	11:11 AM	12-15-2008	Ans by Machine		
37	1	1	Tanaka, Helen	1 555 555-0085	11:12 AM	12-15-2008	No Answer		
38	1	1	Weston, Barbara	1 555 555-6413	11:13 AM	12-15-2008	Ans by Machine		

Clicking the **Monthly** button brings up the entire month's 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**.

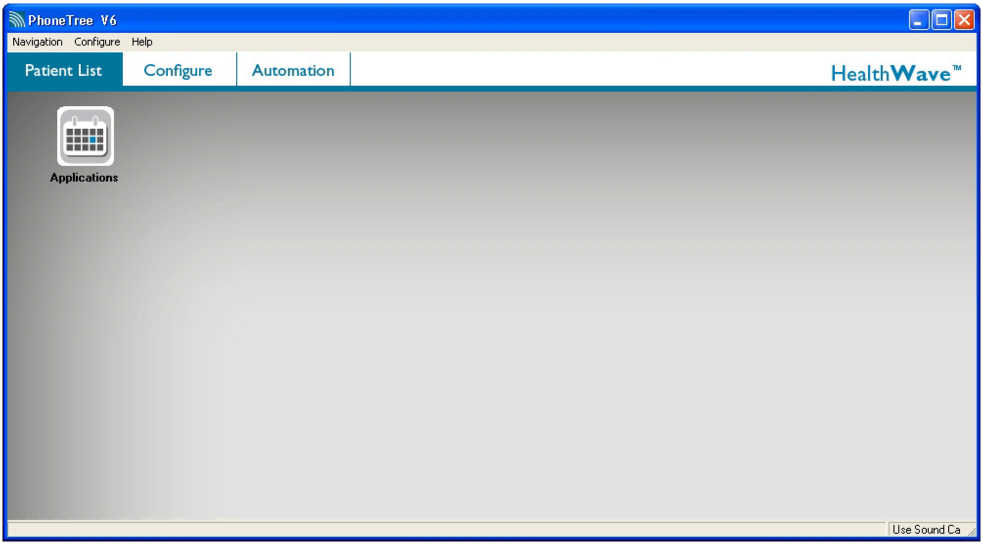


Print any Call Log Query by clicking the **Print** button (on the toolbar of the main Call Logs screen, see page 88), then choose the desired **Report Format** to use and click **Print**.

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 Flexible and Basic 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.



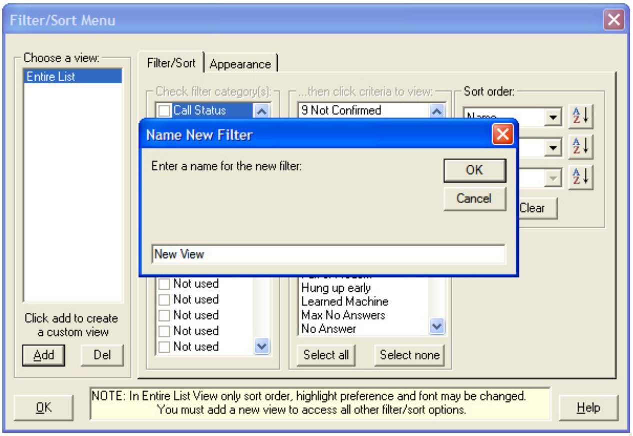
a) Click on the **Patient List** tab, and then click the **Applications** icon. From the drop-down menu that appears, select your desired Application, and then click **OK**. The List Editor will now appear.

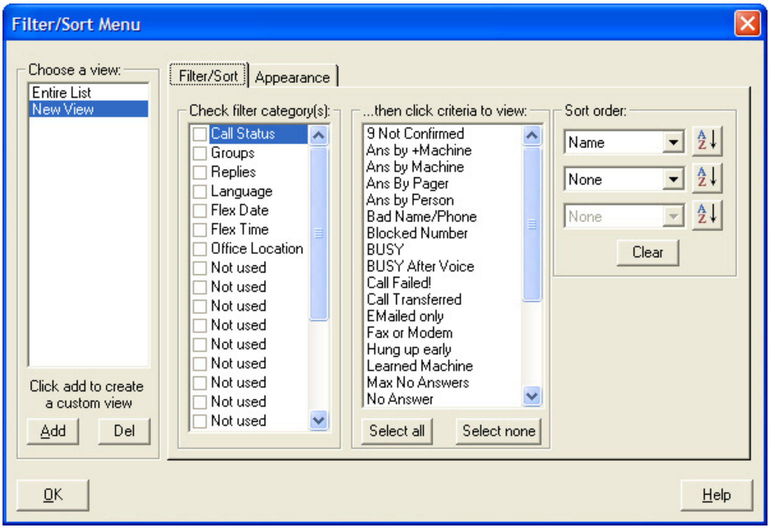
b) Click on the **Filter** icon from the top toolbar.

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

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

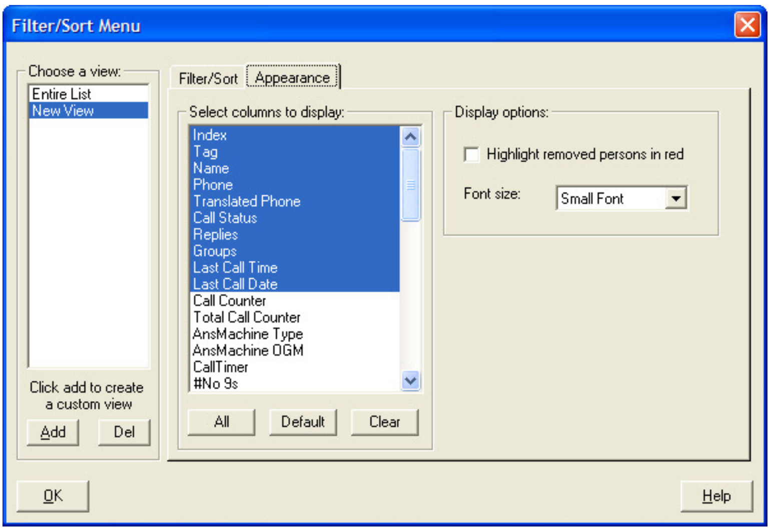
To create a new view, click **Add**. You will be asked to choose a name for the new view. Type in a name and then click **OK**.





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.

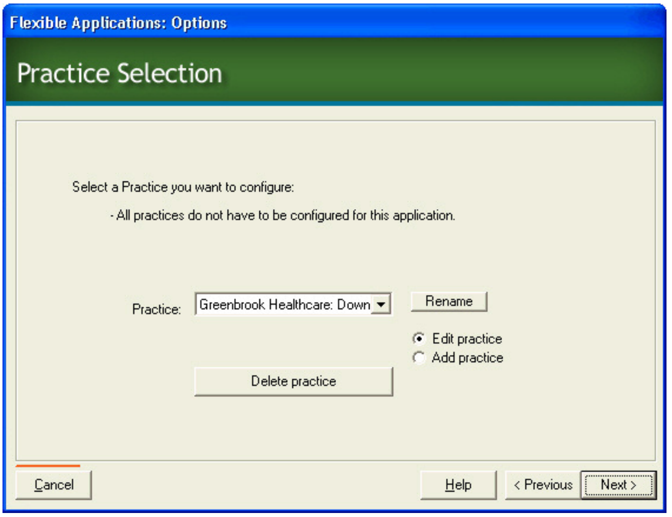
Also, to sort your call list by a certain field, choose up to three different fields and the order to be arranged in under **Sort Order**.



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 Flexible Applications: Options Wizard:



Notes

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