



GETTING STARTED GUIDE



HealthWave™ (Desktop)

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

Software



Installation CD



Female Voice CD

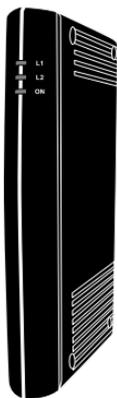


Male Voice CD

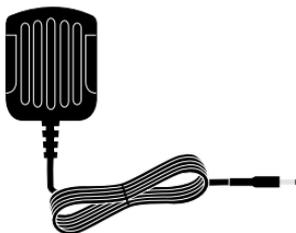


User Guide CD

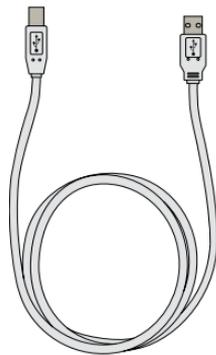
Hardware



PhoneTree Hardware
& Vertical Stand



Power Adapter



USB Cable



Duplex Adapter



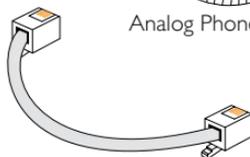
Headset Microphone



Long Phone Cable



Analog Phone (for testing)



Short Phone Cable

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

This guide will assist you with installing the PhoneTree HealthWave system on your computer. Once you have completed steps 1-5, please contact PhoneTree Customer Support to schedule the remaining configurations for your system.

Install the Software

Note: Before installing the HealthWave software, ensure the intended Windows® operating system user is a part of the Local Administrative Group, and for computers running Windows Vista® or Windows® 7, User Account Control (UAC) has been disabled (see insert inside PhoneTree package).

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

PhoneTree Messaging Systems

Serial Key: XXXX-XXXX-XXXX-XXXX

Base Promo

You are entitled to: 100 Free Calls!

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

Valid through: 6/24/20xx



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

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

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



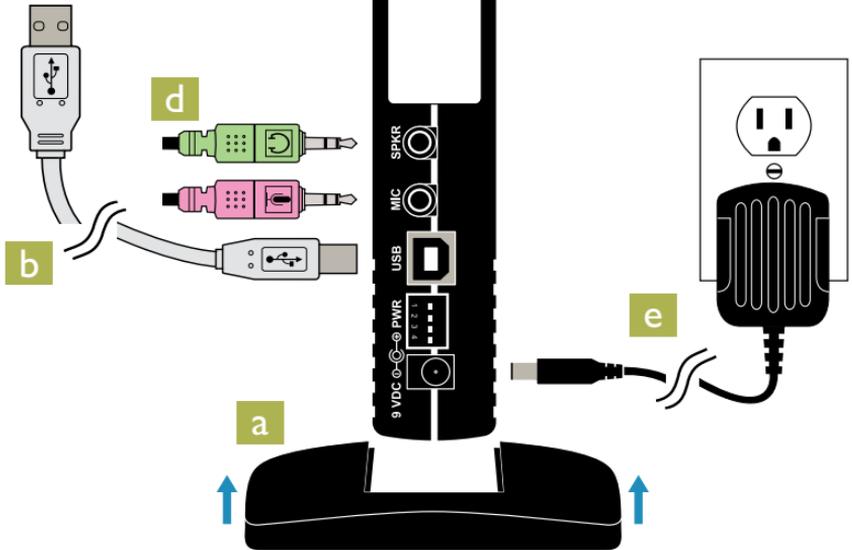
Proceed to Step 2



2

Connect the Hardware

Your computer's
USB Jack



- a. Slide the **Vertical Stand** into the bottom groove of the PhoneTree unit until it snaps into place.
- b. Connect the square end of the **USB Cable** to the PhoneTree unit and the flat end to an available USB port on your computer.
- c. Connect the **Long Phone Cable** to the PhoneTree unit and the other end to an available analog wall jack (see step 3).
- d. Connect the **Headset Microphone's** headphone plug (green) to the **SPKR** jack and microphone plug (pink) to the **MIC** jack.
- e. Connect the **Power Adapter** to the PhoneTree unit and the other end to an available surge protector (recommended) or wall outlet.

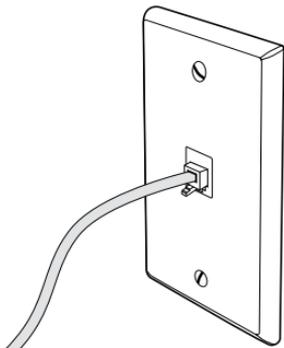
Proceed to Step 3



3 Connect Analog Phone Cable

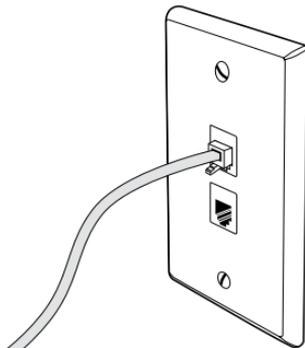
The PhoneTree unit's single phone jack design allows it to be used as a 1 or 2-line system, based on the number of lines you purchased. Use the examples below to connect the PhoneTree unit to your wall jack.

Single, 1 or 2-Line Analog Wall Jack
(1 or 2-Line PhoneTree Unit)



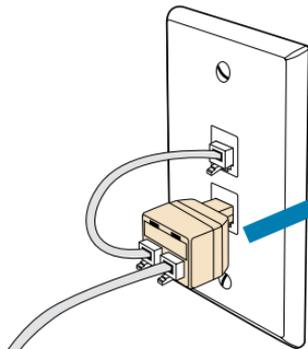
Connect the PhoneTree unit to the wall jack using the **Long Phone Cable**.

Duplex Analog Wall Jack
1-Line PhoneTree Unit)

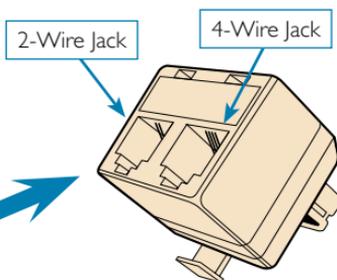


Connect the PhoneTree unit to either wall jack using the **Long Phone Cable**.

Duplex Analog Wall Jack
(2-Line PhoneTree Unit)



Connect the PhoneTree unit to the 4-wire jack on the **Duplex Adapter** using the **Long Phone Cable**, then plug the Adapter into either wall jack. Using the **Short Phone Cable**, connect the 2-wire jack on the Duplex Adapter to the remaining wall jack.



Please Note: The **Duplex Adapter** has been specially wired for exclusive use when connecting the PhoneTree hardware to a duplex analog wall jack. **It will not serve as a standard splitter.** This adapter is not found in stores and is only sold directly from PhoneTree.

Proceed to Step 4



4

Install the Hardware Drivers

Once the PhoneTree hardware has been connected to your computer, Microsoft Windows may prompt you for permission to install the PhoneTree unit's hardware drivers. These drivers are necessary for operation and are 100% safe to install on your computer.

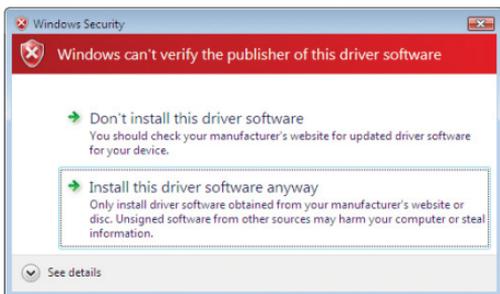
Windows® XP:



Choose **No, not this time** and click **Next**. On the following screen, choose **Install the software automatically (Recommended)**, then click **Next**.

Click **Continue Anyway** to continue installation. You will be prompted to do this several times until the installation is complete.

Windows Vista® and Windows® 7:



You may receive the above warning screen. Choose **Install this driver software anyway**. Once the installation completes, Microsoft Windows will display the **Your devices are ready to use** message.

Proceed to Step 5



5

Export Your Data

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

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

What To Do Next:

Congratulations! You are now ready to contact the helpful staff at PhoneTree.

Now that you've completed steps 1-5, please call **800.555.0559** to schedule a **Pre-Installation Session**. During this session (30-45 minutes), a PhoneTree technician will remotely connect to the computer where HealthWave is installed and test the software, hardware and the connected analog phone lines. The technician will also be available to answer any questions you may have.

After your Pre-Installation is complete, another session (60-90 minutes) will be scheduled to configure and train you on how to operate your new HealthWave system.

Thank you for choosing PhoneTree!

SUPPORT 800.555.0559 | phonetree.com/support



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