



GETTING STARTED GUIDE



HealthWave™ (Hosted)

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



Headset Microphone

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 1-3, 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
(for use during software installation)

Account Number: XXXXXX

Activation Code: XX-XXX
(for use during account registration)



- 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.

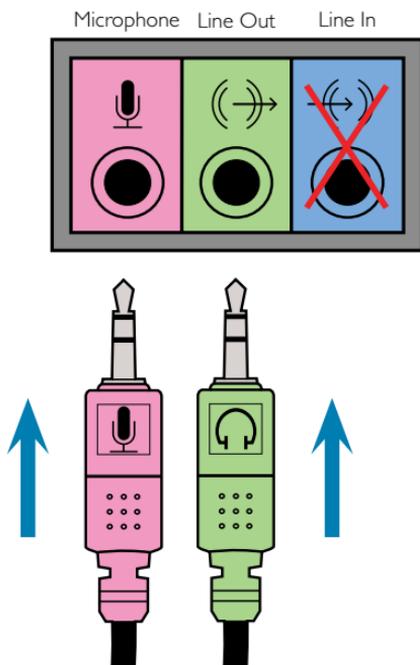


Proceed to Step 2



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Connect the Headset



- Locate the **Microphone** and **Line Out** jacks on your computer. If you see jacks on the front and back, choose your preferred location.
- Connect the **Microphone** plug (pink) to the **Microphone** jack and the **Headphones** plug (green) to the **Line Out** jack. Most computers have these jacks color coded and should match the color of the plugs. If your computer's jacks are not color coded, use the symbols shown to identify each jack. **Note:** If speakers are currently connected to the Line Out jack, you can leave those connected, or unplug them and opt to use the headphones instead.

Proceed to Step 3



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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 three 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 1-3, 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. 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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