

TeleVox HouseCalls

Integration Instructions for Edge



The Edge integration with HouseCalls™ from TeleVox® allows you to create your calling list in Edge and pass that information to HouseCalls.

Setup

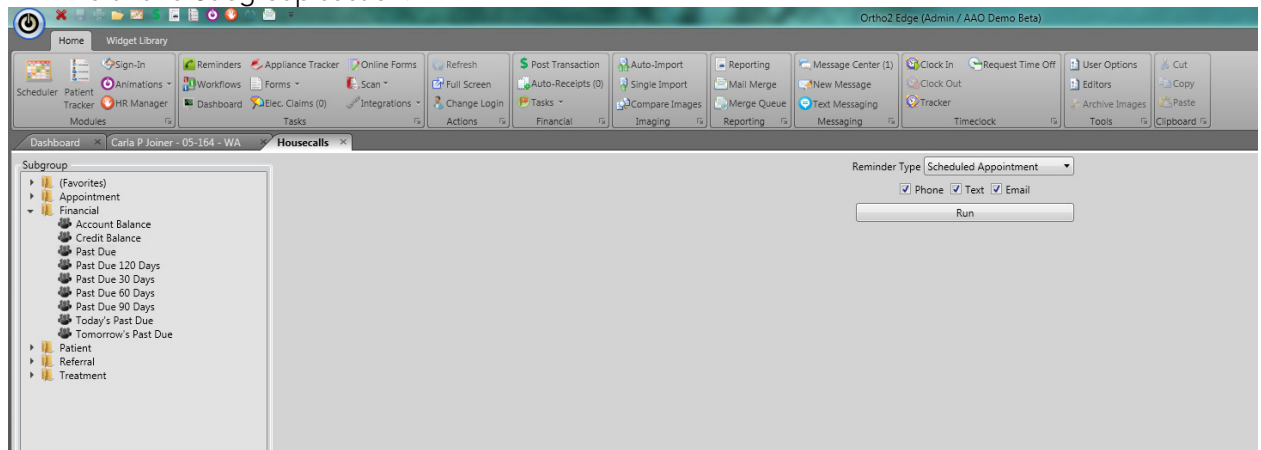
Before you begin be sure that both Edge and HouseCalls are installed properly.

- 1 In the Edge Home ribbon, select **Editors** from the Tools section of options.
- 2 Select Reminders from the Integrations group of editors.
- 3 Enter your username and password in the login prompt and click **Login**.
- 4 Select HouseCalls along the top in the Plugins section of the editor.
- 5 Check the **Active** checkbox under the Settings options.
- 6 Enter any TeleVox address, Guid codes, and Phone details provided by TeleVox into the settings area.
- 7 When finished, click the **Save** icon in the upper left.
- 8 Close the Editors screen.

A screenshot of the "HouseCalls" settings window. The window has a title bar "Plugins" and contains several sections: "Edge Reminders Housecalls" with a green phone icon and a blue 'V' icon; "Settings" with a checked "Active" checkbox and a text field for "My Televox Address" containing "www-atl.mytelevox.com"; and "Reminder Type Guides" with a list of fields: "Appointment Guid:" (with example "Ex: 79FB652E-FC2F-481C-A9DD-14AF79CE9939"), "Recall Guid:", "Missed Appointment Guid:", "Birthday Greeting Guid:", "Account Balance Guid:", "Phone E164 Prefix:" (with "+1"), and "Phone E164 Area Code:".

Using the Integration

- 1 In the Home ribbon, click the **Reminders** button from the Tasks section.
- 2 In the Housecalls screen that opens, select the subgroup of patients to receive reminders from the left hand Subgroup section.



- 3 Choose the appropriate reminder type from the Reminder Type dropdown menu.

- 4 Check off reminder method options for Phone, Text, and E-mail reminders. Reminder messages will be sent via any methods selected.
- 5 Click **Run** to generate a list of patients based on the selected subgroup.

New Message Set Confirmation

Patient Name	Appointment Date	Contact Info	Type	Send
Flowers, Rachael	08/27/2012 02:30 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Anorhe, Carly	08/29/2012 11:10 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osoegell, Keaton	08/15/2012 02:30 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	09/05/2012 03:40 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	09/05/2012 03:40 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Lincep, Nazmah	09/07/2013 03:30 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Isodi, Robin	09/11/2012 03:20 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Ethana, Laura	09/10/2012 03:30 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Contallot, Adriana	09/10/2012 02:30 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Joiner, Carla	10/30/2012 12:00 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osoeli, Tara	09/04/2013 12:00 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Joiner, Carla	01/09/2008 10:10 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Oneofast, Dylan	04/09/2008 03:50 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Oneofast, Dylan	06/17/2008 01:00 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Oneofast, Dylan	09/15/2008 03:50 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Oneofast, Dylan	01/06/2009 02:50 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osoeli, Tara	02/04/2009 04:20 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Oneofast, Dylan	02/23/2009 07:30 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	02/10/2009 07:30 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	02/10/2009 07:30 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Flowers, Rachael	05/04/2009 02:10 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Flowers, Rachael	05/06/2009 02:10 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Lincep, Nazmah	07/06/2009 04:00 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Ethana, Laura	07/13/2009 04:00 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Contallot, Adriana	07/27/2009 01:00 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	09/01/2009 08:00 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	09/01/2009 08:00 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Lincep, Nazmah	08/25/2009 01:40 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Joiner, Carla	10/21/2009 09:30 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Lincep, Nazmah	10/13/2009 04:00 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	09/22/2009 07:30 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Esaerth, Amanda	09/22/2009 07:30 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osoeli, Tara	10/22/2009 10:10 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osoeli, Tara	11/04/2009 07:50 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osoeli, Tara	10/22/2009 10:10 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Lincep, Nazmah	11/21/2009 02:50 PM	+15153334444	Phone	<input checked="" type="checkbox"/>

Check All Uncheck All Send Cancel

- 6 In the list that appears, choose Check All to select all patients, Uncheck All to uncheck all patients, Send to send the reminder message to all selected patient, or Cancel to clear the list. Alternately, you can manually check or uncheck individual patients from the list by clicking the Send checkbox on each line.
- 7 Once the desired patients are selected, click **Send** to send the call job to HouseCalls.

Contact

HouseCalls

TeleVox
 110 Montlimar Dr., Suite 700
 Mobile, AL 36609
 www.televox.com
 (800) 644-4266

Edge

Ortho2
 1107 Buckeye Avenue
 Ames, IA 50010
 www.ortho2.com
 (800) 346-4504 or (515) 233-1026