

# TeleVox HouseCalls

Integration Instructions for Edge Cloud



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

## Setup

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

- 1 In the Edge Cloud 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 software's configuration window for HouseCalls. The window has a title bar that says "Plugins" and contains two icons: a green phone icon and a blue 'V' icon. Below the icons is the text "Edge Reminders Housecalls". The "Settings" section includes a checked "Active" checkbox, a text field for "My Televox Address" containing "www-atl.mytelevox.com", and a "Reminder Type Guides" section with a dropdown menu set to "Ex: 79FB652E-FC2F-481C-A9DD-14AF79CE9939". Below this are several empty text input fields for "Appointment Guid:", "Recall Guid:", "Missed Appointment Guid:", "Birthday Greeting Guid:", "Account Balance Guid:", "Phone E164 Prefix:" (containing "+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.

A screenshot of the "Housecalls" interface. The top ribbon shows various tool icons. The main area is divided into a "Subgroup" list on the left and a "Reminder Type" configuration on the right. The "Subgroup" list includes "Favorites", "Appointment", "Financial", "Account Balance", "Credit Balance", "Past Due", "Past Due 120 Days", "Past Due 30 Days", "Past Due 60 Days", "Past Due 90 Days", "Today's Past Due", "Tomorrow's Past Due", "Patient", "Referral", and "Treatment". The "Reminder Type" dropdown is set to "Scheduled Appointment". Below it are checked checkboxes for "Phone", "Text", and "Email", and a "Run" button.

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

- 4 Check off reminder method options for Phone, Text, and Email 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"/>
Lincepco, Nazmah	09/07/2013 03:30 PM	+15153334444	Phone	<input checked="" type="checkbox"/>
Isocli, Tara	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"/>
Osocli, 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"/>
Osocli, 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"/>
Lincepco, 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"/>
Lincepco, 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"/>
Lincepco, 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"/>
Osocli, Tara	10/22/2009 10:10 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osocli, Tara	11/04/2009 07:50 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Osocli, Tara	10/22/2009 10:10 AM	+15153334444	Phone	<input checked="" type="checkbox"/>
Lincepco, 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

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