

Inphonite ReminderPro

Integration Instructions for ViewPoint



The ViewPoint integration with ReminderPro from Inphonite allows you to create your calling list in ViewPoint and pass that information to ReminderPro. These features require the ViewPoint OutBound Integration.

Setup

Use this ReminderPro specific document along with the OutBound Integration section of Chapter 7: Tools & Utilities and Plug Ins in the *ViewPoint 7 Training & Users Guide* for complete setup instructions.

Before you begin be sure that both ViewPoint and ReminderPro are installed properly.

- 1 From the ViewPoint Main Menu at the station that will be making the reminders, click **Tools & Utilities** and then **OutBound Integration**.

Note: If you receive a CD-Key mismatch message, contact your Ortho2 Regional Manager.

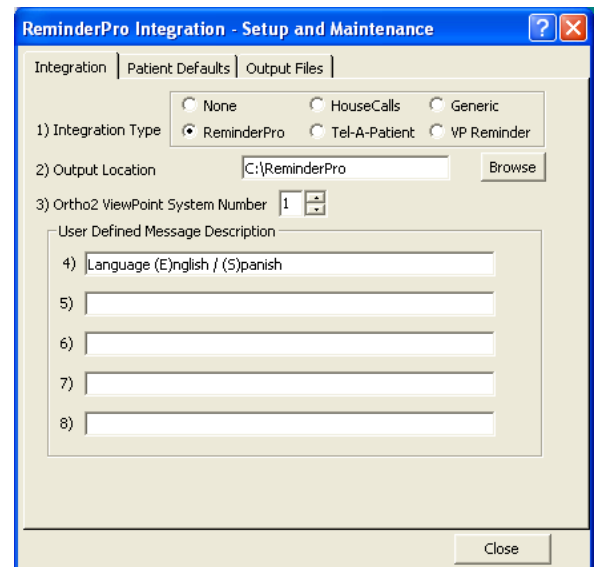
- 2 Click **Setup and Maintenance**. This opens *OutBound Integration - Setup and Maintenance*.

- 3 Select **ReminderPro** as the **Integration Type**.

- 4 To set the **Output Location**, click **Browse** and navigate to the location where ReminderPro will expect the output file (also known as the calling list or OutBound_1.OCS).*

- 5 Refer to the *Training & Users Guide* for additional instructions. Click **Close**.

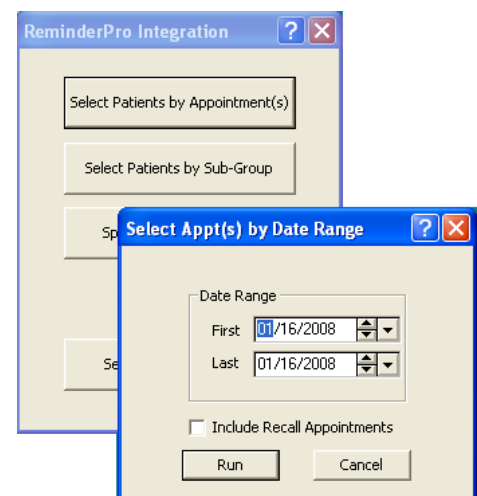
* Definitions for each field in OutBound_1.OCS can be found in the *Training & Users Guide*.



Using the Integration

Select Patients by Appointment

- 1 From the ViewPoint Main Menu at the station that will be making the reminders, click **Tools & Utilities** and then **OutBound Integration**.
- 2 Click **Select Patients by Appointment(s)**.
- 3 Select the range of appointment dates for which you would like to call/email. Typically the next appointment day is used for both **First** date and **Last** date.
- 4 Select **Include Recall Appointments** if you would like patients with recall appointments to be included in the



same file as patients with regular appointments. Clear **Include Recall Appointments** if you do not.

5 Click **Run**.

ViewPoint then saves an output file at the location specified in Field 2 of the Setup and Maintenance Integration tab. The file is named OutBound_1.OCS.

One record is created in the file for each appointment in the selected date range. As a result, any patient with multiple appointments in that date range will have multiple records in the file. If you want to limit such a patient to only one call, contact Inphonite for assistance.

Select Patients by Subgroup

- 1** From the ViewPoint Main Menu *at the station that will be making the reminders*, click **Tools & Utilities** and then **OutBound Integration**.
- 2** Click **Select Patients by Subgroup**.
- 3** In the *Subgroup Templates* window, select or create the subgroup of patients you wish to include. Then click **OK**.
- 4** In the *Choose Output File* window, select the description of the file that is appropriate for the subgroup you have just chosen. Then click **Run**.

ViewPoint then saves an output file at the location specified in Field 2 of the Setup and Maintenance Integration tab. This file is named OutBound_#.OCS. The number (#) equals the line number on the *Choose Output File* window.

One record is created in the file for each patient matching the subgroup criteria. Appointment information, if any, will be given for the first made appointment.

Contact

ReminderPro

Inphonite
610 East Knox Drive
Tucson, AZ 85705
www.inphonite.com
(800) 350-7693

ViewPoint

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