

# Tel-A-Patient PowerCalls

Integration Instructions for ViewPoint



The ViewPoint integration with PowerCalls from Tel-A-Patient allows you to create your calling list in ViewPoint and pass that information to PowerCalls. These features require the ViewPoint OutBound Integration.

## Setup

Use this PowerCalls 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.

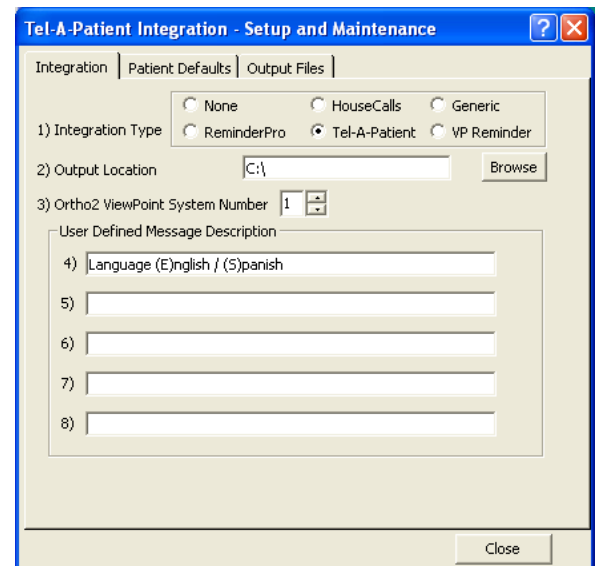
Before you begin be sure that both ViewPoint and PowerCalls are installed properly.

- 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 **Tel-A-Patient** as the **Integration Type**.
- 4 To set the **Output Location**, click **Browse** and navigate to the location where PowerCalls 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**.

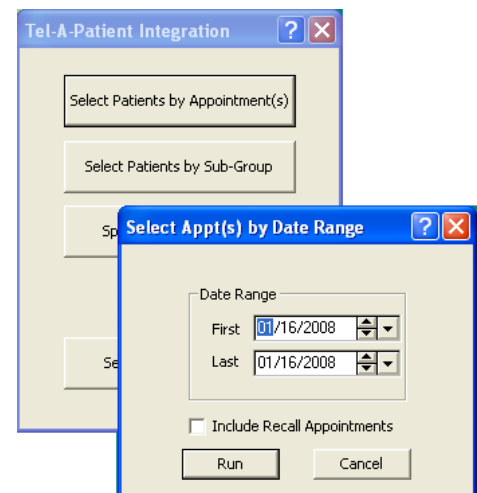
\* Definitions for each field in OutBound\_1.OCS can be found in the *Training & Users Guide*.



## 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 Tel-A-Patient 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

### PowerCalls

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