

# TeleVox HouseCalls

Integration Instructions for ViewPoint



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

## Setup

Use this HouseCalls 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 HouseCalls 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 Systems Consultant.

- 2 Click **[Setup and Maintenance]**. This opens *OutBound Integration - Setup and Maintenance*.
- 3 Select **HouseCalls** as the **Integration Type**.
- 4 ViewPoint will attempt to automatically detect where HouseCalls is installed. If it is unable to find it, type in the **Location of HouseCalls**. This is the location where HouseCalls will expect the output file (also known as the calling list or HCalls\_1.OCS).\*
- 5 Select fields 9 & 10 if you wish:

**Field 9) Automatically build calling list when running HouseCalls:** When this checkbox is selected, a calling list based on information in your output files is created automatically when HouseCalls is started.

**Field 10) Exit ViewPoint after running HouseCalls:** This feature is especially useful if you set HouseCalls to run after you have left the office. When this option is selected, ViewPoint will be closed automatically after HouseCalls is started.

- 6 Refer to the *Training & Users Guide* for additional instructions. Click **[Close]**.

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

A screenshot of the "HouseCalls Integration - Setup and Maintenance" dialog box. The dialog has three tabs: "Integration", "Patient Defaults", and "Output Files". The "Integration" tab is active. It contains several settings: "1) Integration Type" with radio buttons for "None", "HouseCalls" (selected), "Generic", "ReminderPro", "Tel-A-Patient", and "VP Reminder"; "2) Location of HouseCalls" with a text box containing "C:\HouseCalls" and a "Detect" button; "3) Ortho2 ViewPoint System Number" with a spin box set to "1"; a section for "User Defined Message Description" with four text boxes (4) containing "Language (E)nglish / (S)panish", (5), (6), (7), and (8); "9) Automatically build calling list when running HouseCalls" with a checked checkbox; and "10) Exit ViewPoint after running HouseCalls" with an unchecked checkbox. A "Close" button is at the bottom right.

## 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]**.

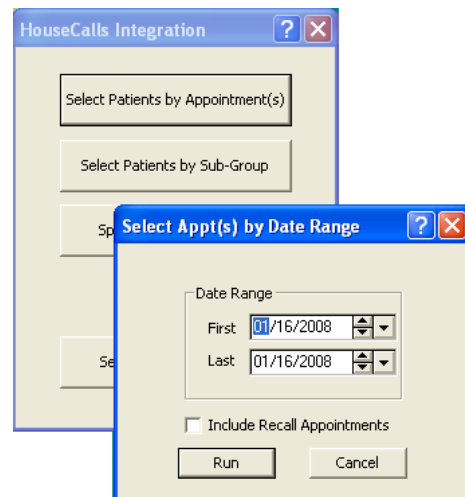
- 2 Click **[Select Patients by Appointment(s)]**.
- 3 Select the range of appointment dates for which you would like to call/e-mail. Typically the next appointment day is used for both **First** date and **Last** date.

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.

- 4 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 HCalls\_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 TeleVox 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 HCalls\_#.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

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