HouseCalls 7.5 Manual
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Welcome to HouseCalls ... A voice messaging system that calls patients, using your staff’s voices, to confirm appointments, perform recall reminders, call no-show patients, send special announcements, wish a happy birthday, and even more!

HouseCalls is a refined office productivity tool designed to improve the process of communicating with patients. You can schedule HouseCalls to deliver messages any time, days, evenings or weekends. Each HouseCalls message can include all important details related to a visit: patient’s name, doctor’s name, dates and times, locations, pre-visit procedure instructions, directions to the office, personal messages from the provider, and much more. All calling activity is completely documented and systems are capable of being expanded to accommodate any size practice.

Let’s begin ...
What is HouseCalls?

HouseCalls is a patient communication system that uses your office staff voices to deliver a professional and caring telephone message to each patient.

HouseCalls uses existing computer data systems, such as your current practice management system, and modern voice technology hardware to project a professional image for medical and dental practices. On the average, HouseCalls can make approximately 35 calls per hour for each phone line installed.

Patient messages are individually ‘built’ using TeleVox’s exclusive VoxMerge® Message Building Technology to eliminate the choppy sounding messages found in other systems. Messages built with VoxMerge sound smooth, as if each message were recorded especially for each patient.

How Does It Work?

HouseCalls is first installed by one of TeleVox’s Installation Engineers. It is at this time that your office staff is trained on how to access and use HouseCalls. Every area of the HouseCalls system is explained personally to you and your staff - from importing your calling data to accessing reports.

Along the way, our engineers will guide you through recording your messages so that they sound smooth and professional. Helpful hints can make the difference between a good-sounding message and a great-sounding message!

During the installation, our engineers will show your staff how to generate the files that are needed to automatically import data into the HouseCalls system. In this way, the data that you are currently updating in your practice management system can be sent directly to the HouseCalls system.

After the data is imported, you can review and update any of the calling information. When you’re finished, HouseCalls will verify the phone numbers and allow you to record any new patient names. You can also add any special messages for a patient at this time.
Finally, you tell HouseCalls when to call, and your work is done! HouseCalls will start calling and keep calling until the specified stop time. HouseCalls will even continue to keep calling the patients who were not home or had a busy signal. The next morning, you can review the call results and listen to any messages that patients may have left.

What are the Advantages of Using HouseCalls?

HouseCalls offers several advantages, including the following:

- Deliver messages in early evenings, when patients are more likely to be at home
- Simple to use, takes only minutes to set up each day
- Calls for hours without stopping, and even calls over multiple scheduled days
- Increases office productivity
- Reduces no shows
- Flexible response options, callers can respond to your message
- “Family messages feature” that include all family members in one call
- Detailed calling results reports
- Expandable to accommodate growth of your business
- Has 1-800 customer support
- HIPAA compliant

What Types of Messages Can HouseCalls Deliver?

HouseCalls can deliver any type of message, including (but not limited to):

- Appointment Reminders
- Accounts Receivable
- Medication Reminders
- Pre and Post Op Reminders
- New Patient Information
- No Show Reschedules
- Patient Opinion Surveys
- New Service Information
- Marketing Patient Seminars
- Patient Recalls
- Birthday Messages
- And Many More.....

Implementing HouseCalls in Your Practice

HouseCalls is not a solicitation; it is an important message from your doctor. To prevent any confusion your patients might have, it is advisable to introduce the system before a call is placed. Remember that HouseCalls is a service your practice is implementing because your patients have asked for it. Patients understand that healthcare costs are high, and you must do everything practical to run your practice like a business.

Follow the suggested marketing steps, and we can guarantee a more positive patient reception of your practice. We have included a few ideas for you to springboard your own creative thinking!

- Place a counter card by the reception area; this will start your office staff talking to patients about the new service.
- Write a letter to your patients, giving specific reasons for the move to HouseCalls. See the Sample Patient Letter for ideas.
- Write a short paragraph in your office newsletter
- Place a reminder at your front desk for personnel, reminding them to mention the new service whenever new patients are leaving the office.
- Record an introduction by a Doctor or Office Manager introducing your newest patient service – HouseCalls.
- Include a short statement on the back of an appointment card stating: “In order to serve you better, you will be reminded of your next appointment by our personalized appointment reminder system.”

Good luck with your new system! Please do not hesitate to call us for any further help implementing HouseCalls in your practice. We would love to hear your ideas for successfully implementing HouseCalls!
About TeleVox Software, Inc.

TeleVox Software, Inc. is a technology-centered company with the leading edge in Health Care Telephony Solutions. Serving thousands of doctors nationwide, and in Canada and Australia, our goal is to provide flexible, quality solutions that benefit health care organizations by lowering costs, improving productivity, and increasing revenue.

The TeleVox Team has created a classic foundation for this new technology, with state-of-the-art features like VoxMerge® and Data-Driven Voice Messaging. We're here today with the features of tomorrow.

Along with our extensive functionality and features, TeleVox prides itself on customer care. Our toll-free technical support and extended help desk hours provide our clients with the telephone and online assistance needed to quickly resolve questions.

Compare the message quality, product features, and our reputation for customer care ... and you’ll see why TeleVox makes the difference!

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**HouseCalls 7.5 Classic View**

HouseCalls Classic View offers a simplistic method of setting up your appointment reminder phone calls, your recall and no show messages, and your birthday wishes.

For additional information on any of the icons located in HouseCalls Wizard View, select the icon from the images below.
Daily Routine

Calling Page Information

What steps are involved in bringing data from your scheduling software into HouseCalls?

Typically, our system installers set up every HouseCalls customer with a “Daily Routine”. In other words ... What steps are involved in bringing my current data into HouseCalls?

Though the steps may be different for each customer, they generally have similar steps. The first step is to print to file the reports that will be used by HouseCalls to make calls. These can be appointment reports, recall reports, no-show summaries, birthday listings, and more. Our installers will show you what steps to take when printing these reports, so that a data file will be created at the same time. Once you have generated these reports, HouseCalls will have the files that it needs to get started.

Simply double-click on the HouseCalls icon, and the system will automatically see that you have new files to import. You will be able to see your patients scrolling across the screen. When it has finished importing, HouseCalls will show your patients on the main calling page, then it will step you through reviewing the calling data, building a calling list, and setting up a calling schedule. It’s that simple!
Editing the Calling Page Information

After the data has been imported, you can review the calling information and change any entry. Simply highlight a patient from the calling page by clicking on the patient’s name. If you click the right mouse button, you will see a shortcut menu that will let you change anything about the selected items.
This shortcut menu is especially helpful in changing information that involves multiple calling entries. In this way, you can manipulate multiple items easily. Here are some tips on selecting patients:

- Click with your left mouse button to select a single patient.
- Hold down the SHIFT key, and click with the left mouse button to select a range of patients.
- Hold down the CTRL key, and click with the left mouse button to select multiple patients that are spread throughout the calling page.

If you want to edit the information on a single patient, click the Edit button on the toolbar. This will bring up the Calling Page Information screen where you will be able to change the calling information for this particular patient.

Also, if manually adding a patient to the calling page, the Calling Page Information screen allows you to set the appointment information. The information changed on this screen takes effect for this calling page only.

To edit Patient Information, such as phone number or address, click the Patient Info button to go to the Patient Update Screen.
If you would like to record or play the Patient's name, choose **Record** or **Play** respectively.

**Note:** This records the individual name recording, not the library of name recording.

---

**Calling Page Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>7.00 - R. Spreckelsen</td>
</tr>
<tr>
<td>Calling Page</td>
<td>Friday, October 17, 2003</td>
</tr>
<tr>
<td>Time</td>
<td>8:00 AM</td>
</tr>
<tr>
<td>Special Date</td>
<td>/ /</td>
</tr>
<tr>
<td>Language</td>
<td>English</td>
</tr>
<tr>
<td>Doctor</td>
<td>Cindy Nelson</td>
</tr>
<tr>
<td>Location</td>
<td>The Main Office</td>
</tr>
<tr>
<td>Procedure</td>
<td>Routine Exam</td>
</tr>
<tr>
<td>Message</td>
<td>Standard Appt</td>
</tr>
<tr>
<td>Fax Message</td>
<td>No Message</td>
</tr>
<tr>
<td>Email Message</td>
<td>No Message</td>
</tr>
<tr>
<td>Volume</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**

---

**Date**

If you want to navigate to other calling page dates, you can select the "Date" icon from the main toolbar. In addition, the left arrow will take you to the previous day, the right arrow will take you to the next day, and the schedule book will bring you back to the current day.

By clicking on the **Date** icon, you can select a specific calling page day to view.
Add a Patient

On occasion, you may want to manually add a calling entry or a patient into the system.

- To manually add a patient to the calling page, choose Add from the top icon bar; a search screen will appear.
- In the 'Search by' field, select what information you want to search for... Patient Name, Patient Number, Phone Number, or Reference Number.
- In the 'Find' box, type in the text you wish to search for and click Find.
A list of results will appear in the bottom window. If the patient you are searching for is not in the system, you may click the New button to go to the Patient Update Screen where you may manually add the patient to the HouseCalls system.

Highlight the patient you were searching for and click Select.

The Calling Page Information Screen will now appear where you may enter appointment information, such as the calling page date/time, the message which will be assigned, the doctor, location, procedure, and much more.
Delete A Patient from Calling Page

If you need to delete a patient from the calling page, highlight the patient and choose the Delete button. Or you may highlight the patient and press the DELETE key on your keyboard.

If you need to delete several patients from the calling page, here are some tips:

- Click with your left mouse button to select a single patient.
- Hold down the SHIFT key, and click with the left mouse button to select a range of patients.
- Hold down the CTRL key, and click with the left mouse button to select multiple patients that are spread throughout the calling page.

Exit

To Exit the HouseCalls program, choose the Exit button. This will close the HouseCalls application.
Build Calling List

How to Build a Calling List in Classic View

1. Before you build your calling list, you should first export your appointments from within your Practice Management System and import that list into HouseCalls. Once imported into HouseCalls, verify the patients to be called and the messages they are to receive.

2. If you need to manually add patients, click Add in the main toolbar. Type in the patient’s last name and select that person for your list.

3. When you have verified and/or added every patient that you want to include on your list, click Build List.

4. On the dialog box that appears, select the calling page date range to extract the calls. These are the dates that your patients appear on the HouseCalls calling page. By default, Omit Answered Calls is checked. This tells HouseCalls to not call patients on the list that have already been contacted. Under normal circumstances, you want to leave this option checked during the build list process. Once your calling list dates are selected, click Begin.

5. As you are building the calling list, HouseCalls may find some phone numbers that contain exchanges that have never been dialed before. If so, the following screen will appear, prompting you to decide how HouseCalls should dial the number. Selecting the first option enters the exchange in local exchanges and tells HouseCalls to dial this exchange as a local 7-digit number. Selecting the second option places the area code and exchange in local exchanges and tells...
HouseCalls to dial this exchange as a local 10-digit 'metro' number. Selecting the third option places the area code and exchange in long distance exchanges and tells HouseCalls to dial this number as a long distance number preceded by a '1'.

**How to Dial**

How would you like HouseCalls to dial this number for STEVE RUSSELL?

(251)555-1478

Dial as:

- 555-1478
- 251-555-1478
- 1-251-555-1478

6. Follow the on-screen prompts for correcting invalid phone numbers and recording each patient’s name. Remember, you will only need to record the names that you have not already recorded in a previous HouseCalls calling session. Even better, if you’re using the library of names, you will only need to record a name one time for all of your patients having the same name (i.e. the name Cindy can be recorded once and used for all of your patients having a first name of Cindy).
7. You can add special messages to any of the patients in the calling list. Below is the screen that will allow you to select a patient and record a special message. In Classic View, you may record a special message to only one patient at a time.

8. In the final stage of building a calling list, the “Call Scheduler” dialog box appears. At the Call Scheduler, specify the day and time you want your patients
to be called. A calling schedule can be set up for a single day or for multiple
days (for instance, over a weekend). If you place a checkmark in Set as Default
Calling Time, HouseCalls will save the start time and ending time as the default
for your next calling schedule.

9. You may opt to have HouseCalls call your list over several days. To set up
HouseCalls for multiple calling days, click on Multiple Calling Dates. The Call
Schedule button will be enabled, and you can set up each calling day and time.
For example, you can have HouseCalls call Friday’s calling page on Wednesday
night from 4:00 PM to 8:00 PM and continue on Thursday from 1:00 PM to 5:30
PM.

To add a date, highlight Add a Calling Date, then click Select. Enter your calling
date and time and choose Save. Repeat this process until you have all your calling
dates entered.
10. To set HouseCalls to run, select Call Patients.

The first screen that follows is a verification of the current system date and time. Since the accuracy of the system clock is critical in making calls at the correct time, HouseCalls lets you examine and change this information. If the system date and time are correct, click Yes.
Next, HouseCalls will check for a dial tone to make sure that the phone line is in place. If it does not detect a dial tone, it will display a message that will let you know to check the phone line connections.

Finally, HouseCalls will wait for the start time. At the HouseCalls wait screen, you may choose Stop Call Scheduling to stop the wait process. Once the scheduled calling time is reached, HouseCalls will activate the TeleVox Line Monitor and begin making calls.
Maintenance

Add/Modify/Delete Records

Add/Modify/Delete Patients

The patient update screen defines the unique characteristics of each patient. In other words, the information on this page defines what information HouseCalls will employ when making its call.

You may open the Patient Update Screen 2 different ways. The first way is by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Patients. The second way is from the Calling Page, you may double click the patient name.

Patient records are automatically created when you import your data file into HouseCalls. If you choose to manually add a new patient to the HouseCalls system, you may do so by choosing Add.

The Patient No field contains the patient number; this field is usually defined by imported data from the practice management system. If the Nick Name field contains a name, then this name will be used when HouseCalls makes the call; if it is empty, HouseCalls will use the name in the First Name field.

You can also record and play the patient’s full name from this screen. If you are using the library of first names in your messages, then you do not want to record the patient name here, but instead within the Voice Manager.
Patient Calling Parameters

There are 5 patient calling parameters that you can define for each patient:

1. Rotary Phone: If you know that a patient has a rotary phone, then you can indicate this on the patient’s record in HouseCalls. When this is selected and the patient is called by HouseCalls, they will not hear the normal touch-tone response options. Instead, they will automatically have the option to record a message for the office, so that they will also be able to respond to the call. These patients will appear on the call results report as “Answered – Rotary Message.”

2. Never Call: If a patient does not want to receive a call from the HouseCalls system, you can mark the patient as "Never Call", and they will appear on the HouseCalls report as “Never Call.”

3. Never Leave Message on Answering Machine: This flag can be set in case a patient does not want HouseCalls to leave any messages on the answering machine. The status will appear as “Answering Machine – Message Not Played.”

4. Volume Level: This item tells HouseCalls the volume level it should play the message for a particular patient. You can adjust this value by sliding the bar. The higher the value, the louder the system will play. For a
demo on recording volume, choose Volume Demo within the Parameters Screen.

5. Language: The language flag can be used to indicate what language is primary for each patient. This, in turn, can be used during the importing process to automatically assign a different message to a patient based on the language that they prefer. You may add new languages through the Languages screen within the Maintenance drop-down menu.

**Add/Modify/Delete Doctors**

You may open the Doctors screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Doctors.

This screen defines information pertaining to each doctor that will potentially be merged in a call. Each doctor is assigned a number so that HouseCalls can place that doctor’s name in the message. The information in these fields will typically match the data imported from the practice management system.

The Voice field contains the voice that will be used to record the doctor’s name. You can click on Record or Play, and pick up the HouseCalls phone to perform voice operations. For example, if the doctor’s name is shown as “Dr. George Hall,” you can record “with Dr. Hall” so that it will flow smoothly in the message.

The Doctor’s Message function allows doctors to create a unique message to be placed in a message (“Hello, this is Dr. Hall. I am looking forward to seeing you soon.”) This function is optional; if it is used, the doctor must record his/her message so that the unique message will play in his/her voice. This feature can add a nice personal touch from each doctor, and patients enjoy receiving a message from their HealthCare provider.

In addition, the phone number and extension are used by HouseCalls if the patient chooses to speak with the receptionist. In this way, HouseCalls can transfer the call based on which doctor the patient will be seeing.
Add/Modify/Delete Locations

You may open the Locations screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Locations.

The Voice field contains the voice that will be used to record the Location name. You can record and play the different locations by selecting the appropriate voice, then clicking on the Record or Play buttons.

The text in the Description field does not have to match the recorded element itself. So, your text in the description field is only an identification for what has actually been recorded, and it will typically match the data that is in your imported file. For example, we can see here that the location shows “The Main Office”, but you can record “at our Main Office in Springfield” because that is how you will want it to be inserted into the message.

You may also record additional messages or Directions to this particular location by choosing the appropriate option and recording the message by choose the Record button and following the on screen prompts.
Add/Modify/Delete Procedures

You may open the Procedures screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Procedures.

The Voice field contains the voice that will be used to record the Procedure name. You can record and play the different Procedures by selecting the appropriate voice, then clicking on the Record or Play buttons.

The text in the Description field does not have to match the recorded element itself. So, your text in the description field is only an identification for what has actually been recorded, and it will typically match the data that is in your imported file. For example, we can see here that the procedure shows “Routine Exam”, but you can record “for a Routine Exam” because that is how you will want it to be inserted into the message.
Local Area Codes

In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

To enter the Local Area Codes, choose Maintenance from the drop down menu, select Add/Modify Delete Records and choose Local Area Codes. This will open a window that will allow you to add, edit, or delete the local area codes in your area. To add a new local area code, select the Add button and type in the 3-digit local area code.
**Local Exchanges**

In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

Local Exchanges can best be defined as phone numbers that must be dialed as local numbers, either with or without the area code.

To enter Local Exchanges, choose Maintenance, then select Add/Modify Delete Records and choose Local Exchanges. This will open a window that will allow you to add, edit, or delete the local exchanges in your area. To add a new local exchange, select the Add button and type in your 3-digit or 6-digit local exchange.

**3-digits vs. 6-digits**

If you need numbers within a local area code to be dialed as 7-digit local numbers, you need to choose Add and type in only the 3-digit exchange (the portion after the area code).

If you need numbers within a local area code to be dialed as 10-digit local numbers, you need to choose Add and type in the 6 digit exchange ... area code + the 3 digit exchange.

If you are setting up 10-digit dialing (metro) for all numbers in an area code, you may
simplify the process by running a program called metros6.exe located in the HouseCalls directory.

**Long Distance Exchanges**

In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

Long Distance Exchanges can best be defined as phone numbers within your local area code that must be dialed as long distance ... with a '1' preceding the area code.

To enter Long Distance Exchanges, choose Maintenance, then select Add/Modify Delete Records and choose Long Distance Exchanges. This will open a window that will allow you to add, edit, or delete the long distance exchanges in your area. To add a new long
distance exchange, select the Add button and type in the area code + the exchange (6 digits).

**Languages**

HouseCalls can support an unlimited number of languages. You may add languages to the HouseCalls system by choosing Maintenance from the drop-down menu, choosing Add/Modify/Delete Records, and then selecting Languages.

A language can be assigned to each patient in the Patient Update Screen, and a language can also be assigned to a voice in the Edit Voice screen within the Voice Manager.
Even more, HouseCalls will allow you to enter the scripts for days, months, numbers, and dates, so you can record the system elements using the syntax for each language. Here we can see some system elements scripts within the Voice Manager that have been entered for the months in Spanish.

---

**Select from List of Months**

<table>
<thead>
<tr>
<th>Name</th>
<th>Number</th>
<th>Recorded</th>
</tr>
</thead>
<tbody>
<tr>
<td>enero</td>
<td>1</td>
<td>No</td>
</tr>
<tr>
<td>febrero</td>
<td>2</td>
<td>No</td>
</tr>
<tr>
<td>marzo</td>
<td>3</td>
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</tr>
<tr>
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<tr>
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<tr>
<td>diciembre</td>
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</tr>
</tbody>
</table>

Voice: Pedro
Message Retrieval Access

Message Retrieval Access is used to identify who will be calling into the Message Retrieval System and which messages they should receive. You can define a unique PIN for different staff members, locations, or a combination of the two. You will find the Message Retrieval Access screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Message Retrieval Access.

The Access Entry number is simply a unique identification number for HouseCalls to utilize when collecting the messages for this entry. The Personal Identification Number (PIN) is the number that is actually entered when a staff member is calling in to the Message Retrieval System. The PIN can contain any numeric value, up to 10 digits. The description field should give information on who will be using the PIN to retrieve messages.

When calling into the HouseCalls system, the PIN is used in conjunction with the Access Code to allow entry into the system. The access code is initially assigned the default value (found on the Message Retrieval Parameters screen), and this can be changed at any time from this screen or by the staff member when calling into the system.
If you click on “Change Access Code,” a dialog box will appear, enabling you to enter a new access code. You must first enter the current access code, then follow with the new access code and a confirmation of the code. Next, Click on the “Save” button for your changes to be stored.

You can also clear the access code, and this will once again restore the default value back to the code. In addition, you may select Auto-Delete Outdated Messages and then specify the number of days for HouseCalls to automatically “clean up” any outdated messages that may be in the system.

FIFO and LIFO tell HouseCalls the order in which it should play the messages for this access entry. FIFO (First In, First Out) will play the messages oldest to newest, and LIFO (Last In, First Out) will play the messages newest to oldest.

If you check Only Include Specific Doctors, a button will be enabled which will allow you to specify the doctors that should be selected for the access entry. From the Specify Doctors screen, you can move the ‘Available Doctors’ into the ‘Selected Doctors’ list by clicking on the doctor’s name, then click on the “>” (move right) button or use the mouse to drag the doctor’s name on top of the ‘Selected Doctors’ list.
You can also utilize the CTRL button when clicking on doctor names to select multiple doctors that are scattered throughout the list, or you can use the SHIFT button to select multiple names that are within a range of doctors.

In the same way, you can remove selected doctors by putting their names back into the ‘Available Doctors’ list.

The “>>” (move all right) button indicates that you would like to move all of the doctors from the ‘Available Doctors’ list into the ‘Selected Doctors’ list, and the “<<” (move all left) button is used to remove all of the selected doctors from the list.

A similar screen will appear to select the specific locations that should be assigned to the access entry.
Parameters

Calling Parameters

To open the Parameters screen, choose Maintenance from the drop-down menu, then select Parameters.

The Parameters screen defines 'how' HouseCalls makes each call. You can customize HouseCalls with your preferences and bypass the default values. Below is a description of each field:

- **Identification Play Count after Answer**: Defines the number of times HouseCalls will play the identification options before it plays the message.

- **Message Play Count after Answer**: The number of times HouseCalls will play a message if it does not receive a touch-tone response.

- **Repeat Call after Busy Count**: The number of times HouseCalls will recall a busy number before it moves on to the next phone number in the calling list. If HouseCalls does bypass a busy phone number, it will try the phone call again after the calling list is finished or in the time specified in "Minutes to Wait Before Retrying Call".

- **Time (seconds) between Busy Signal**: The number of seconds HouseCalls will wait before it re-dials a busy phone number.

- **Maximum Busy Signals**: Defines the number of Busy Signals, or Busy Tones, HouseCalls listens for, before determining if a phone number is busy.

- **Maximum Rings**: The number of rings HouseCalls listens for before determining a phone call has not been answered. If HouseCalls determines a status of 'No Answer' HouseCalls will retry that number again in the time specified in "Minutes to Wait Before Retrying Call".

- **Play Amplification**: How loud a message will play.

- **Record Amplification**: Defines the volume at which you record names, greeting, and other message elements.

- **Max Times to Play on Answering Machine**: How many times HouseCalls will leave a message on an answering machine.

- **Seconds to Wait Between Messages on AM**: If HouseCalls is set to leave the message more than once on answering machines, this parameter defines the number of seconds between each message left on the machine.
Seconds to Wait Before Calling: Defines how many seconds HouseCalls will wait between making phone calls.

Minutes to Wait Before Retrying Call: The minimum amount of times that HouseCalls will wait before attempting to recall a patient that it could not reach at an earlier time because of no answer, a busy phone, etc. The number of times HouseCalls will retry different Call Statuses can be defined in Advanced Parameters.

Local Dialing Prefix: If the phone system requires a digit (or group of digits) to be dialed before local phone numbers, such as a '9', you may enter it in this field. Specify Codes allows you to set local dialing prefix to only certain exchanges.

Long Distance Access Code: If the phone system requires a digit (or group of digits) to be dialed before long distance phone numbers, such as a '9', you may enter it in this field. Specify Codes allows you to set long distance dialing prefixes to only certain area codes.

Long Distance Suffix: If the phone system required a digit (or group of digits) to be dialed after long distance numbers, you may enter it in this field.

Bypass dialing 1 for Long Distance Calls: If selected, HouseCalls will not dial ‘1’ preceding the area code when making long distance phone calls.

Leave Message on Answering Machine: Determines whether HouseCalls will leave a message on an answering machine when a phone call is placed.

Select Rotary for New Patients: Automatically assigns 'Rotary Phone' to any new patients that are added to the HouseCalls system.

Print Pie Chart for Combined Call Results: When the Combined Call Results Report prints, a pie chart will also be printed.

Preview Names Before Recording: Allows the user to preview non-recorded names during the build list process before recording.

Use Default Recording if Missing: Allows the user to use default merge recordings if the message is missing a recording.

Allow Multiple Calls Per Patient: Determines if HouseCalls should make multiple phone call to the same household if the patients have the same phone number. For example, if two family members have appointments on the same day, HouseCalls can either make two separate phone calls, one to each family member, or it can restrict one of the numbers to give the appointment information for both patients in one message. If you decide to restrict multiple calls, you have the option of creating 'Family Messages' that combine all appointment information for multiple family members into one consolidated message. After a family message is created, you must setup Notification Messages.

Restrict Calls: Determines how HouseCalls defines Multiple Calls Restricted (Family Message); either by phone number or an account number. The default setting is to restrict by 'Home Phone'.
**Date Format:** Determines how HouseCalls plays the date in a message. The default setting is to play the 'Ordinal'.

There are also several other options throughout the Parameter screens. Settings for retrying phone calls, call transferring, faxing methods, bypassing build list options, and call results reporting options can be found under the Advanced Parameters screen.

The Setup Options Parameter screen allows the user to change calling properties, answering machine detection, email options, and much more.

Choosing the Restore Defaults button from the Calling Parameter screen changes all Parameter values back to their default setting.

Volume Demo allows the user to hear the different volumes HouseCalls can playback. The default setting for 'Play Amplification' is 3 and can be adjusted. The higher the value, the louder the system will play the message.

HouseCalls has the ability to restrict multiple calls to a patient based on their phone number or account number. Notification Messages is a way to set up Family messages, so all patient names and appointment times are included in a single message, eliminating the need to call the same phone number several times.

Choose Exit, to Save and Close the Parameters screen.
Advanced Parameters

To open the Advanced Parameters screen, choose Maintenance from the drop-down menu, then select Parameters. From within the Parameters screen, choose the Advanced button.

Advanced Parameters allow you to set your recall preferences based on the status of each call. For example, if the message was “Left on an Answering Machine,” should HouseCalls recall? Likewise if there was “No Answer,” should HouseCalls recall? Select Yes or No for each field; if you click the “#Retries” option, you must input how many times you want to recall.

- **Answered - Yes/No:** A person answered and pressed the touch tone key to indicate ‘Yes’ or ‘No’ as the response.
- **No Answer:** The last calling attempt had no answer.
- **Left Message:** A person answered and pressed the touch tone key to leave a message.
- **Ans Machine - Left Msg:** The message was delivered on an answering machine.
- **Ans Machine - No Msg:** The message was not played on an answering machine.
- **Hung Up:** A person answered but did not listen to the entire message.
- **No Response:** A person answered and listened to the entire message but did not respond to the touch tone options.
- **Busy:** The last calling attempt was busy.
- **Out of Order:** A special information tone was received - call was attempted.
- **No Touch Tone Req.:** The call was completed, no responses were required.
- **Confirmed - No Response:** Identification confirmed and then listened to the entire message.
- **Confirmed - Hung Up:** Identification confirmed and then did not listen to the entire message.
**Fax Transmission Not complete**: The number of times HouseCalls will try to re-fax if the fax transmission did not complete. This function is only applicable to those who choose to automatically fax after the calling session.

**Faxing Method**: You have the option to send the entire document at once or you can send one page at a time. Extended faxing will produce an attractive, graphical call results report that can be sent to most fax machines.

**Talk to Receptionist**: This defines where HouseCalls sends patients who want to speak with a receptionist. HouseCalls can ring the local HouseCalls PC, perform three-way calling, or dial an extension. The extension or number dialed can be linked to the doctor that the patient will be seeing.

**Bypass Names Not Recorded**: If selected, HouseCalls will not prompt you to record a name on your calling list that has not been previously recorded. It will “bypass” that name, and you can select if you would like to have HouseCalls assign the status as 'Name Not Recorded', spell the patient name, or play a generic 'member of family' element.

**Bypass Exchanges Not on File**: If selected, HouseCalls will not prompt you to specify how to dial phone exchanges which have not been entered into the HouseCalls system. You have the option to either assign a status of 'Not on File' or dial those numbers as Long Distance.

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<table>
<thead>
<tr>
<th>Advanced Calling Parameters</th>
<th>Number of Retries</th>
<th>Recall?</th>
<th>Faxing Method:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Yes</td>
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<tr>
<td>Answered - Yes/No</td>
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<tr>
<td>No Answer</td>
<td></td>
<td></td>
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<tr>
<td>Left Message</td>
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<tr>
<td>Ans Machine - Left Msg</td>
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<tr>
<td>Ans Machine - No Msg</td>
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<tr>
<td>Hung Up</td>
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<td>No Response</td>
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<tr>
<td>Busy</td>
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<tr>
<td>Out of Order</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Touch Tone Rec.</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

| Caller Identification       |        |
| Confirmed - No Response     |     |
| Confirmed - Hung Up         |     |

| Fax Transmission Not Complete | 1 |

<table>
<thead>
<tr>
<th>Call Results Report:</th>
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</thead>
<tbody>
<tr>
<td>Auto-Print Report:</td>
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<tr>
<td>Combined</td>
</tr>
<tr>
<td>By Doctor</td>
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<tr>
<td>By Location</td>
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<tr>
<td>Sort by Name Under Status</td>
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<tr>
<td>Print Report by Time</td>
</tr>
<tr>
<td>Exclude Msg Not Assigned</td>
</tr>
<tr>
<td>Include Doctor Names</td>
</tr>
<tr>
<td>Include Location Names</td>
</tr>
<tr>
<td>Record Detailed Call History</td>
</tr>
<tr>
<td>Auto Delete Outdated Mgs</td>
</tr>
<tr>
<td>Over: 0 days</td>
</tr>
</tbody>
</table>

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**Save**

**Exit**
**Bypass Invalid Phone Numbers**: If selected, HouseCalls will automatically bypass all invalid phone numbers without alerting you to correct it.

**Bypass Special Messages**: If selected, HouseCalls will not prompt you for adding special messages when you build the calling list.

**Bypass Displaying Call Summary Report**: If selected, HouseCalls will not show the Call Summary Report after the Calling Session has completed.

**Auto Print Report**: Automatically prints calling report after the calling session. The report can print either combined, by doctor, or by location. You also have options here to print the report by time, exclude messages that are not assigned, include the doctor names (rather than doctor numbers), and include the location names (rather than location numbers).

**Sort by Name Under Status**: When the report is printed, the report is sorted alphabetically by name under each status.

**Print Report by Time**: If selected, the report will include the appointment time.

**Exclude M sg N ot A ssigned**: If selected, the report will not include patients that did not have a message assigned.

**Include Doctor Names**: If selected, the report will include Doctor Names.

**Include Location Names**: If selected, the report will include Locations.

**Record Detailed Calling History**: If selected, HouseCalls will store a detailed history of each call, including number of times called and each response.

**Auto Delete Outdated Messages Over**: This field lets the user specify the number of days before HouseCalls automatically deletes messages left by patients.

---

**Setup Options**

To open the Setup Options screen, choose Maintenance from the drop-down menu, then select Parameters. From within the Parameters screen, choose the Setup Options button.

The Setup Options page determines the method in which HouseCalls records and plays voice files. These parameters determine values for silence and noise; they also define where silence begins or ends depending on the number of frames.
The “CP” fields deal with voice detection; the values in these fields reflect the quantifiable components (time, silence, noise) when placing a phone call to a patient. By editing any of these parameters, you will affect the sound quality and message delivery of each message.

**Play Device**: Determines the type of device used to play messages and message elements.

**Record Device**: Determines the type of device used to record messages and message elements.

**Trim Leading Silence**: During the recording process, HouseCalls will eliminate all silence in the beginning of your recording. This process is known as VoxMerge and is what produces a seamless message.

**Trim Trailing Silence**: During the recording process, HouseCalls will eliminate all silence at the end of your recording. This process is known as VoxMerge and is what produces a seamless message.

**Bypass Dial Tone Detection**: If selected, HouseCalls will not check for a dial tone during the build list process.

**Touch Tone Interruption**: If the touch tone interrupt is on, this function allows patients to respond to the message by pressing a touch tone before the message has finished playing.

Be careful! We recommend consulting our technical support staff before changing the parameters.
Calling Methods

To open the Calling Methods screen, choose Maintenance from the drop-down menu, then select Parameters. Next, select the Setup Option button, then choose the Calling Methods button.

HouseCalls offers a variety of different methods to determining whether a phone call has reached a human or an answering machine. Choose the calling method that best suits your calling environment.

Calling Method #1

Calling Method #1 determines the difference between answering machines and people by measuring the amount of continuous noise and silence that is detected on the line after the call has been answered.
For example, if a person answers the phone, they will typically say “Hello”, followed by a period of silence. HouseCalls will detect this as a short voice followed by a long pause, and will determine that a person has answered. HouseCalls will then play the message for the patient.

If an answering machine picks up, HouseCalls will detect that a long voice is heard. For example, “Hi, you have reached the Smith Residence and we can’t come to the telephone at this time...”. Once the long voice is detected, HouseCalls will continue to listen, while the answering machine is playing the message, until a period of silence is reached. At that point, HouseCalls will play the patient’s message on the answering machine.

**Pros:**

- This is the default calling method. It is the easiest to set up and requires no extra recording.
- Parameters can be adjusted for the amount of silence time and the amount of long voice time that are evaluated during a call.

**Cons:**

- A person who answers the phone as “Smith Residence, Barbara speaking” may be detected as an answering machine.
- If the message of a patient’s answering machine plays “Hi” with a long pause, followed by “you have reached the Smith Residence and we can’t come to the phone...”, HouseCalls may detect this as a person, resulting in only part of the message being left after the ‘beep’ of the machine.
- Background noise, such as a loud television, may interfere with HouseCalls properly identifying people.
Calling Method #2

If Calling Method #2 is chosen, HouseCalls places the phone call and immediately upon hearing a voice, it plays a short message to indicate that an important message from the doctor will soon be played. After the short message is played, HouseCalls will make the determination whether it has reached a person or an answering machine.

For example, after a voice is detected on the line, HouseCalls will play “Please hold for an important message from Dr. Johnson”. Next, the noise level is measured to determine if HouseCalls has reached a person or an answering machine. If it detects silence, then HouseCalls determines that it has reached a person. If it detects noise, then HouseCalls assumes that it has reached an answering machine.

Pros:

- Provides for more accurate answering machine detection.
- Provides an immediate confirmation to the patient that a message from their doctor is about to be played.

Cons:

- Some patients may believe this to be a solicitation call and not listen to the message in its entirety.
• Background noise, such as a loud television, may interfere with HouseCalls properly identifying people.

**Calling Method #2 (Advanced)**

With Advanced Calling Method #2, HouseCalls will require a touch-tone response to determine that a person has answered.

For example, HouseCalls will place its call; upon hearing voice, it will immediately say, “Press 1 if this is a person and would like to hear an important message from Dr. Johnson”. If the person presses 1, HouseCalls recognizes the recipient as a person. However, if no key is pressed, HouseCalls determines that it has reached an answering machine.

**Pros:**

• Provides the most accurate answering machine detection of all three methods.

**Cons:**

• Requires the patient to press the 1 key prior to listening to the message.
• If a person answers the phone and does not press 1, HouseCalls will detect them as an answering machine.
Calling Method #3

With Calling Method #3, HouseCalls plays the message immediately upon hearing voice, and always detects the recipient as a person. Calling method #3 is not suggested for use with most systems as this method does not detect the difference between people and answering machines.

Calling Method #4

With Calling Method #4, HouseCalls ends call progress immediately after the call is answered. HouseCalls will then begin recording on the line, and will end the recording upon reaching a determined amount of silence (Total silence time for ending the recording for Method 4).

The total recording time will then be calculated, which will be used to distinguish if HouseCalls has reached a person or an answering machine.

Pros:

- Easy to setup and requires no extra recording.
Parameters can be adjusted for the total amount of silence time and the total amount of recording time.

**Cons:**

- A person who answers the phone as “Smith Residence, Barbara speaking” may be detected as an answering machine.
- If the message of a patient’s answering machine plays “Hi” with a long pause, followed by “you have reached the Smith Residence and we can’t come to the phone…”, HouseCalls may detect this as a person, resulting in only part of the message being left after the ‘beep’ of the machine.
- Background noise, such as a loud television, may interfere with HouseCalls properly identifying people.

### Calling Methods

**Calling Methods**

- **Use Speech Recognition for Answering Machine Detection**

HouseCalls can use either of the following calling methods when contacting your patients. Please choose which calling method you would like to activate when making calls:

- **Method 1**
  - Here's how Method 1 works:
  - The fourth method ends call progress immediately after the call is answered. HouseCalls will then begin recording on the line, and will end the recording upon reaching a determined amount of silence.

- **Method 2**
  - The total recording time will then be calculated, which will be used to distinguish if HouseCalls has reached a person or an answering machine.

- **Method 3**
  - Total silence time for ending the recording for Method 3: 175

- **Method 4**
  - Total recording time to determine that a person has been reached: 400
  - Detect additional silence if an answering machine has been reached: 400

---

**Speech Recognition**

HouseCalls Version 7.5 has the capability to use speech recognition to accurately detect between answering machines and humans… as well as identifying operator messages for busy phones, out of order messages, and solicitation blocks.

**Pros:**

- Accurate detection.
• Ability to add/edit/delete words and phrases to adjust detection.

Cons:

• Due to the additional time required to analyze the recorded file and determine what words and phrases were said, some systems may experience a delay before the message begins.
• Requires a higher speed processor and higher amounts of RAM compared to other calling methods to quickly analyze the recorded wav files.

### Notification Messages

You may have several family members scheduled for appointments on the same day. Rather than giving each one of the family members a separate phone call, you may create a family message that contains all appointment information for all patients in a single phone call.

To open Notification Messages, choose Maintenance from the drop-down menu, then select Parameters. Within the Parameters screen, choose the button Notification Messages.
To enable/disable this button, check/un-check the option Allow Multiple Calls Per Patient.

To set which message will become the family message, highlight the original message and choose Select. From the drop-down menu, select the appropriate family message and choose Save.
Here we can see that the first message, Standard Appointment, will become message #4, ‘Family Appt’, if there are multiple calls to the same phone number in the calling list.

In this way, HouseCalls sends out the family message with one call, rather than multiple calls. The family call will appear in the call results report along with the call status that was received, and all of the other calls will appear as “Multiple Calls Restricted.”

Finally, you will need to record two special words that may be used in your family messages. In the Voice Manager, click on Words, then Edit Selection. You will see here that there is a word that is inserted before the final name (Ex: 9. AND), and a word that will be inserted before each appointment time (Ex: 10. AT).

**Options**

When building the family message for a calling list, only include calls that have the same family message assigned.

During the build list process, all multiple calls must be assigned the same message to be included in the family message.

Copy the call result information from the call placed for the family message to all calls in the household which have a status of ‘Multiple Calls Restricted’.

On the call results report, the calling information will be reflected on all calls, even those with the status ‘Multiple Calls Restricted’.

---

**Email Options**

To open the Email Options screen, choose Maintenance from the drop-down menu, then select Parameters. From within the Parameters screen, choose the Setup Options button. Then from within the Setup Options screen, choose the Email Options button.
Preferred Time to Send Email Messages: You may choose to send email messages immediately before calling patients or immediately after calling patients.

Connect to the Internet Before Emailing the Call Results Report: Choose this option if using a dial-up modem internet connection and you are required to connect to the internet prior to sending an email.

Mail Server: Type in the name of the mail server being used

Note: In order to setup Email messages, you must enter an Email From name and a valid Email Address in the Doctor Update Screen for Dr. #0.

International Options

To open the International Options screen, choose Maintenance from the drop-down menu, then select Parameters. From within the Parameters screen, choose the Setup Options button. Then from within the Setup Options screen, choose the International button.
By default, HouseCalls uses standard home phone numbers to call patients; however, if needed you may set HouseCalls to use International Phone Numbers instead.

If you would like HouseCalls to use International Phone Numbers, place a checkmark in the appropriate check box. If this box is checked, HouseCalls will use the phone number in the International Phone field in the Patient Update Screen.

If you would like HouseCalls to print the date on the report as DD/MM/YY, place a checkmark in the appropriate check box.

**Message Retrieval Parameters**

**Message Retrieval Parameters**

Message Retrieval Parameters can be accessed from the Maintenance drop-down menu by selecting Message Retrieval Parameters. These parameters affect how the Message Retrieval System operates, and they control how the program can be automatically scheduled to run on a day-to-day basis.
The **Max Attempts for Entering PIN** and **Max Attempts for Entering Access Code** fields define the maximum number of times that a staff member can attempt to input their PIN or Access Code before the system will reach the maximum number of retries and disconnect.

The **Max Times to Repeat Menu Options** tells the Message Retrieval program how many times it should repeat the menu options when it is detecting that there is no response from the caller. If it hits the maximum number of times to repeat the menu options, it will assume that the caller is not responding, and the system will disconnect the call.

The **Number of Rings Before Answering** determines how many rings should occur before the line is picked up by the Message Retrieval System.

The **Max Seconds to Automatically Stop the Message Manager Before Calling** field defines the amount of time, in seconds, that HouseCalls should wait before determining that it cannot automatically close the Message Manager before calling. This parameter is only utilized if the Message Retrieval Program is active when HouseCalls is ready to start making calls.

The Message Retrieval Program also has its own play amplification. You can adjust the volume level that the prompts are played by clicking down on the bar and sliding it left or right with your mouse.
The “Default Access Code” tells HouseCalls what value to assign to the access code field when a new access entry is added, or when the access code is cleared. This field can be blank, or it can be numeric up to 10 digits.

There are also fields that enable you to automatically schedule the Message Retrieval Program to run after making calls. You simply check the days that HouseCalls will be making calls, then select the day and time that HouseCalls should stop the Message Retrieval program. For example, if you are calling on Monday night, HouseCalls will activate the Message Retrieval program after calling, and it will keep the program active until the following Tuesday at 2:00 PM.

Finally, you can select the voice that will be used for the prompts in the Message Retrieval Program.

**Message Retrieval Activation**

Message Retrieval Activation is a way to manually start the Message Retrieval Program so that staff members can call into the system to retrieve their messages. You can find this screen by choosing Program from the drop-down menu and selecting Activate Call-In Utility to Retrieve Messages.

From this screen, you can tell HouseCalls when it should stop accepting calls for this session. The arrow keys can be used to assist you in adjusting the date or time fields. Next, click on the Activate Call-In button.
The Line Monitor will open and HouseCalls will be minimized to the task-bar. If you wish, you can minimize the Line Monitor, and continue to work in HouseCalls or other programs as usual.

As staff members call in to pick up their messages, you will notice that the line activity is updated within the Line Monitor. In addition, if you need to close the Message Retrieval System before the stop time is reached, you can click on the Stop Lines button to shutdown the line.

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**Calling Page Configuration**

You may arrange the columns on the calling page by choosing Maintenance from the drop-down menu and selecting Calling Page Configuration.

From within the Calling Page Configuration screen, drag-and-drop the items into any order you wish. Once complete, click Save.

Also, from the Calling Page Configuration screen, you can set the opening and closing times for your office. In some cases, this will tell HouseCalls if an appointment time is AM or PM.
Screen Labels

You may opt to change your primary identification tags within HouseCalls. For example, if you are implementing HouseCalls in an insurance setting, you may want to change “Patient” to “Claimant” and “Doctor” to “Adjuster.”

To change the screen labels, choose Maintenance from the drop-down menu and select HouseCalls Screen Labels. From within the Label Configuration screen, choose a new label for client, provider, location, or reason by double clicking the name you wish to use. Then, from the Label Choice screen, choose Select to use the new label name.

If you wish to add a new name, double click Add under the appropriate area and enter a new label name.
By updating the label configuration, you will notice that every screen, report, and menu item now has the new label name attached as it relates to the client, provider, location, and reason.

Once you change the settings, you must restart HouseCalls for the changes to take effect.
Backup and Restore

Backup

It is highly recommended you backup your HouseCalls system to a network drive, floppy diskettes, or a zip drive on a regular basis. In case of a computer failure or hard drive failure, a backup of your HouseCalls system will be very beneficial.

To create a backup of the HouseCalls system, choose Maintenance from the drop-down menu and select Backup. Within the Backup screen, select the items you wish to backup, enter a name for your backup, select the drive you want to backup to, and enter a description of the backup. After you have entered the information, click Backup to begin the backup process.

Once complete, 4 files will be created at the location you specified: 'HC101703.zip' (the label name you entered), 'label.mem', 'memvars.mem', and 'summary.txt'.

The items included in the Backup are:

- Schedule: The calling pages
- Name Recordings: The doctor name recordings and the patient name recordings
- Patient File: The patient records
- Message Scripts: The scripts created in voice manager and message builder
- Voice Message Files: The recordings created in voice manager and message builder
- Bridge Files: The bridge records

**Restore**

If you need to restore a backup of the HouseCalls system, choose Maintenance from the drop-down menu, then choose Restore. Within the Restore screen, select the items you wish to restore and the source drive location of the backup. After you have entered the information, click Restore to begin the restore process.

Note: Restoring a backup will overwrite all current data in the HouseCalls system.
**Import**

**Bridge**

In its' simplest form, a bridge is a feature that filters/converts certain information from your Practice Management System (PMS) and places it in HouseCalls. Bridges allow HouseCalls to gather data from an outside source; in this sense, the bridge connects HouseCalls and the outside data source (in your Practice Management System) to more easily filter, store, and send information.

These bridges operate in a format resembling Boolean Conditionals. To gain access to your bridges, choose Import under the Maintenance drop-down menu, then at the next screen, choose Setup.

**Bridge Setup**

The bridge setup screen lets you access any bridge and the file it is associated with. Here, you can scroll through your bridges and modify the parameters of each.

In the Bridge field, you must enter a specific name for this bridge. All data files are different; therefore, all bridge records/ names will treat the data files differently during the converting process.

In the Data File field, you must enter the location and name of the data file that your Practice Management System creates.
Any bridge that is using the Auto Import function must use the Delete File command. You can manually import/convert a data file by choosing Convert; however, you usually want the system to automatically import your data file each time you open HouseCalls, so be sure you have a checkmark in Auto Import.

The Bridge Priority box assigns bridge priority to certain files that have more than one bridge assigned to them.

The Convert, View, and Locate buttons are associated with the data file: You can convert, view, or locate a file by using these functions. You can also locate a bridge using the Locate button. The Assign button lets you assign bridges to message types.

**Bridge Layout**

The bridge layout screen contains the pertinent information from the data file that is used when HouseCalls builds messages. The format of each field corresponds to that of the converted data file.

If the data file is a Printer file, the column (Col) and length (Len) define where in the data file these items are located. If the file is comma delimited (comma separated), you can specify the order where HouseCalls can locate each field.
To "measure" the column and length, choose the Format button to view the converted file, but only after you have chosen Convert. To "count" the field locations in a comma separated file, choose View File to view the original data file. In short, View File allows you to view the original data file, while Format allows you to view the converted data file.

The Format column specifies the way certain information is displayed in the data file.

<table>
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<th>Format</th>
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<th>Len</th>
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<tr>
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</tbody>
</table>

**Advanced Bridge Settings**

The pertinent information associated with the Advanced function is the Automatically Add New Doctors, Locations, and Procedures check-boxes. By checking these boxes, you set HouseCalls to automatically add these elements from the PMS data file, eliminating the need for you to manually add this information into the HouseCalls system. When HouseCalls finds new Doctors, Locations, or Procedures, during the import process, it will automatically add them to the system and prompt you to record the elements.

Another important item on this screen is the feature When Area Code is Not Present, Insert: field. This will allow HouseCalls to fill in the area code with a value if it is missing during the importing process.

Auto-Insert Calling Page Date tells HouseCalls that if the date is not present in the data file, automatically import the data to a specific day.
Auto-Insert Purge Dates tells HouseCalls to automatically clear the HouseCalls calling pages for specified days. If using this option, you must also select Purge Calling Page on the bridge name screen.

Message Mapping

By using message mapping, you define a list of conditions for the item specified. For example, you may want to give all New Patients a different message which includes directions to your office.

Other types of mappings, such as a Language Map, tell HouseCalls to deliver messages in a certain language. Likewise, you can create Never Call Maps, which would flag certain patients as Never Call and prevent those patients from receiving a phone call from the HouseCalls system.

To implement message mapping, select Message Maps from the Page Layout screen. If this button is disabled (grayed-out), then you must choose the drop-down arrow next to Message and changed its value to Mapped. You will see a list of the current message mappings that have been added:
When HouseCalls imports the calling data, it checks the mapping conditions before assigning a message to each patient. In this way, HouseCalls can assign a different message based on the data in your import file. In addition, you can map messages based on multiple fields by joining the conditions with the words “AND” or “OR.” For instance, the following screen sets up a message mapping to assign new patients a different message, message number 2 (New Patient), if the appointment notes contain the words “NP” or “New Patient” or “New”:
Messages can be mapped based on any of the following fields names:
The same type of mappings can be performed for any of the patient calling parameters: Language, Rotary Phone, Never Call, Never Leave Message on Answering Machine, and Volume Level.

Now you can see why HouseCalls is “Data Driven”. Anything that is present in your data files can be interpreted by HouseCalls to automatically deliver flexible, accurate messages.
The Message Builder is the place in HouseCalls where you put all of your recorded pieces together. You can access the Message Builder by clicking on Build Msg from the main toolbar.

**How to Build a Message**

The message builder allows you to create the messages that will be sent to your patients. Once you build a message, you can use it as many times as you like without ever having to rebuild it. You can even edit a message at any time. Building a message is relatively simple. Follow these steps:

1. Click Build Msg from the main toolbar.
2. Before you arrange the elements of your message, you must assign your message a message number. From the drop-down message number box, choose the message number that you want this message to be assigned to. Give the message a brief description in the 'Description' box.
3. Choose the voice that you want assigned to this message, then click on Edit.
4. To begin making the message, click Add Element.
5. Here, you order the individual components of this message. Under each element (greeting, ending, subject, etc.), you may choose an element (or record a new element) to place in your message. For example, highlight the greeting that you want to use and choose Select. If you do not see the greeting that you want to use, simply make the one that you want “on the fly”. To record a new greeting, first click on Greeting on the message element page. Next, click the Greeting icon at the bottom of the screen. Now, type your greeting and then record using the Record button.
6. Continue to add elements to your message until it is complete.
7. When your message is complete, choose Exit. Do not worry if you accidentally add the wrong element. The ‘Rearrange and Delete Screen’ will help you to position your elements in the right order, and delete any unwanted items.
8. Now, the 'Edit Message' screen appears. To finalize your message, click Response Options.
9. Once you select the appropriate response options that you want your patients to have, select Exit. Your message is now complete.
10. Click Verify to make sure that all of your merged elements are present and have been recorded. If you would like to hear your message, click Play and follow the on screen prompts to listen your message.

**Edit Message**

By clicking on Edit in the Message Builder, you access the 'Edit Message' dialog box. This is your destination for compiling the elements of your message. It is also your site for choosing the response options that complete your message.
The Elements screen provides an easy-to-use interface for adding elements to your message:

Simply click on the element that you would like to add, and it will be inserted at the end of the message. Some of the elements may ask you to select from a list of options.
example, the Greeting selection will pull up a list of your available greetings, where you can choose which greeting to add. When you’re finished adding all the elements, you may exit this screen.

If you need to rearrange or delete any of the message elements, you can select Rearrange/Delete from the Edit Message screen and use the following screen shown below. You may drag an element up or down to move it to a new position. You can also select an element by clicking on it, then delete it by clicking on the Delete button.

**Message Elements**

To add a greeting to your message, select the different greetings that are available on the left panel, and the script that applies will appear in the right panel. When you have selected which element to include, click the Select button.
How to Record a New Greeting

Clicking the Greetings button brings you to the destination for recording a new message greeting. In this way, you can add and record new greetings interactively as you are building a message.

Identification Options

To add the identification section to a message, first access the Message Builder and click on the Edit button. Then select Identification Options from the Edit screen.
You can select which identification greeting to use. Then decide if you want to include the patient’s individual full name, use the library of first names, or the library of last names to speak the name. Finally, select which identification instructions will be presented to the patient for pressing the 1 key to confirm receipt of the message.

After enabling Identification Options, select the ID Keys button to set the actions for each touch tone response.
Response Options

Response options allow for an “interactive” session between HouseCalls and the patient.

After a message has been played to the patient, the patient can be presented with response options as indicated in the following screen.
Select the number from the key pad; this will allow you to set an action from the drop-down menu with that particular touch tone key.

**Save Answer as 'Yes'** - Saves the listener’s response as “Yes”. After the patient presses the 1 Key, HouseCalls will play an additional ending, such as “Thank you for confirming your appointment”. The calls are displayed on the call results report as “Answered – Yes”.

**Repeat the Message** - Repeats the message for the patient. After the message is replayed, the patient will be presented with the response options once again. If the listener only replays the message, the call status will be shown as “Answered – Repeated Message”.

**Record a Message** - Records a message after the tone. This allows the patient to leave a message for the office. The call will be indicated as “Answered – Left Message” on the report.

**Play an Optional Message** - Plays an optional message for the patient, such as directions to the office. After the optional message is played, the response options will be repeated.

**Save Answer as 'No'** - After the patient presses the 5 Key, HouseCalls will play an additional ending, such as “We’re sorry that you will be unable to make your appointment. Please call our office to reschedule...”. The result report will show “Answered – No”.

---

**Message Response Options**

- **Include Response Options for Message No. 1**
- **Message Number:** 1

**Response Key 1 Action**

- **Save Answer as 'Yes'**

**Use Instruction No. 1**

**Use Ending No. 1**

**Response Key Summary**

- **Key 1:** Save Answer as 'Yes'
- **Key 6:**
- **Key 2:** Repeat Message
- **Key 7:**
- **Key 3:** Record Message
- **Key 8:**
- **Key 4:** Play an Optional Message
- **Key 9:**
- **Key 5:** Save Answer as 'No'
- **Key 0:**

- **Rotary:** Records a Message After the Tone

- **Use Instruction No. 1**

- **Click the keys to edit or set the response actions for this message.**
Take a Survey - Allows the user to take an optional Survey. This survey module is a separate plug-in to the HouseCalls Software. Please contact TeleVox Software at 800-644-4266 for additional information and pricing.

Ring the Receptionist - Rings the receptionist for assistance. If the call is made during office hours, the response 0 key can be used to ring the receptionist. HouseCalls can ring the receptionist in one of three ways: ringing the local HouseCalls PC, transferring to an extension, or performing a conference call to another number (types of transferring permitted are dependent on your voice board and your phone system).

Changing your Response Options

To change your response options, click “Change” from the Message Response Options dialog box. Make sure you click Change on the number that you would like to change.

You can select from the instructions or endings that appear in the list. As you scroll down the list, you will see the words of the script appear in the right panel. Click on the Select button when you have highlighted the desired option.

If you need to add a new option, you can accomplish this from the Change screen. For example, to add a new response 1 key instruction and ending, click on the 1 Key icon. In the dialog box that appears, type in your instructions and message to play.

Click the letter under the Record column next to the fields that contain your new response options. Once you record, you will have a new response option to choose from.

Family Messages - How to Implement in HouseCalls

Family messages can be useful to implement in HouseCalls because they are able to call a household and deliver a message that contains information pertaining to each family member … all in a single phone call. The first step is to set up a family message in the Message Builder. As you can see below, this message has a special “Family First Names, Appointment Times, and Doctors” element in the message content:
Family elements can include the following:

- Names Only
- Names and Times
- Names, Times, and Doctors
- Names, Times, and Procedures
- Times Only
- Times and Doctors
- Locations, Doctors, Subject 1, First Name, Subject 2, Procedures
- Names, Times, and Locations

Next, you will need to indicate where the family message should be assigned. In this way, when HouseCalls sees more than one call in the calling list with the same phone number, it will replace the original message on the first call with the family message.

You can assign the family message under Notification Messages found on the Parameters screen.
Voice Manager

Deciding What Messages to Create

What makes HouseCalls so wonderful is that the messages are data driven. The system uses information contained in your current patient scheduling system to ‘build’ the content of the messages.

The benefits of data-driven messaging are reflected in the accuracy of the message content. Patients will receive the right information because the messages are based on individual patient data.

For instance, you can probably generate several reports from your current scheduling system. These reports are exactly what HouseCalls uses to import the calling information. This means that anything you see on a report can be included in a message.

Here’s an example of a report (this may look similar to one of your reports):

MARIA HARMON 555-7643 2:00 10/17/2003 RECHECK DR. SMITH PARIS
DARREN MORRIS 555-4691 2:30 10/17/2003 NEW PATIENT DR. MOORE VIENNA

From this data, HouseCalls can call these patients and remind them of their appointment. The message could include:

Greeting: Hello this is Rachel from the Medical Center. I am calling to remind
Patient’s Name: Maria
Subject: that you have an appointment on
Date: Friday, October 17th
Word: scheduled for
Time: 2:00 pm
Doctor: with Dr. Smith
Location: at our Paris Office
Ending: We are looking forward to seeing you then.

HouseCalls can also do something else with this data. Since Darren Morris has “NEW PATIENT” in his appointment notes, HouseCalls can use this information to “map”, or assign, another message. For instance, you may want to send an entirely different message to your new patients, perhaps reminding them to bring their insurance card and giving them directions to the office. HouseCalls has the flexibility to map messages on just about anything.

You may want to look at the different reports that you can generate from your current scheduling system, and use it as a guideline when setting up your HouseCalls messages.
**Voice Manager**

The Voice Manager is the central location for editing voices and recording message elements. You can access the Voice Manager by clicking on the **Voice Mgr** icon from the main toolbar.

The Voice Manager screen will appear:

![Voice Manager Screen](image)

Through the **Edit Voices** button, you can define 9 different voices, irrespective of gender or language. The edit voices function, simply put, is the library that contains the current voices you may use.

The **Edit Selection** button is one way to change your message elements.

Your scripted elements are the Greetings, Subjects, Endings, and Words. These elements are the “building blocks” for a message.

The system elements include the days of the week, months, numbers, and ordinal dates. These can be scripted to reflect the current language that is assigned to the voice.
Identification options help to identify the listener before playing the message, and in turn, the response options help the listener to respond to the HouseCalls message.

Finally, the merge elements appear at the bottom of the list. These are used to insert information that is related to a specific call for a patient. For instance, the patient’s name can be inserted as the patient’s full name, the library of first names, or the library of last names. The libraries allow you to record a name only once and use it for every patient that has the same name. Other merge elements include: the doctor assigned, any specific doctor messages, the location where the patient should arrive, and the procedure that will be performed.

To record different message elements, choose the element that you wish to edit and click the Edit Selection button.

**Edit Voices**

From the Voice Manager screen, you can select “Edit Voices” to maintain the voices in HouseCalls. Voices are used to identify who is recording the message elements.

To add a voice, simply type the voice name in an open slot. You can have up to 9 different voices in the HouseCalls system. You can also specify the language that will apply to each voice. Simply enter the language number next to the voice name. The Language Screen will allow you to view and update your available languages. By changing the language, the scripts will automatically change for days, months, numbers, and dates.

In addition, if a voice needs to be changed (such as a change of staff), you can modify the voice and change the voice to the new name. By checking “Clear Voices”, HouseCalls will clear any of the previous recordings for each voice that has been updated.
After you have added your voice in HouseCalls, you can select it as the current voice by clicking on the drop-down list of voices. You may then begin adding and recording your message elements.

By clicking on a message element on the left, you will be indicating which element you would like to edit. Then by clicking Edit Selection, HouseCalls will take you to the appropriate editing screen.
Tips on Recording

Before you begin recording, here are a few tips on recording that may help to make your messages sound even better:

- Look at the item that you are about to record, and think of how it fits into the message as whole. Try to control the inflection of your voice to match how you would say it if you were speaking the entire message. Recording each element in this way will allow you to create a great sounding message when you put all the pieces together.
- Try to record in a quiet room or at a time when there is not a lot of background noise.
- Everyone likes to hear a friendly voice, and you will find that this is no exception … especially when you consider how many people will be listening to your messages.
- After you click on the record button, a screen will appear that prompts you to pick up the phone. Before picking up the phone, take a deep breath. Remember to speak clearly, and try to keep your volume level the same.
- Start recording after you are prompted. As soon as you’re finished recording, click on the stop button. Remember that breathing and noise could be stored in
the recorded item, so try to stop the recording before it has a chance to pick up any unwanted noise.

- After you have recorded the message elements, try building the message and see how it sounds. If needed, you can re-record the message elements as often as you like to get the result that you want.
- The small pictures to the left of each script indicate the current status of each element. A Green Check-mark ✓ means that the item has been recorded. A Red X ✗ shows that the item has not been recorded. And a Pencil ✒ indicates that the item is available for scripting.

Recording Greetings, Subjects, and Endings

This topic shows you how to record a new Greeting, and it is in this same manner that you can record Subjects and Endings. Here, you can select a blank greeting and click on the Edit button, then type the words of the message that you want to record and choose Save. To record, simply click the Record button and follow the on-screen prompts.
Recording Words

Word elements are single words that are recorded to place within your message. Usually these words are placed before a merge element, such as a time, date, doctor, or location.

To record, type in the word and choose the letter next to the word in the record column.

<table>
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<th>Record</th>
<th>Erase</th>
<th>Word</th>
<th>Record</th>
<th>Erase</th>
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<tr>
<td>AND</td>
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<td>☑</td>
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<td>☑</td>
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<tr>
<td>AT</td>
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<td>☑</td>
</tr>
</tbody>
</table>

* Word for Family Merge (Inserted before Final Name)  Ex: AND
** Word for Family Merge (Inserted before Time)  Ex: AT
*** Word for Hour  (Inserted after the Hour for Playing International Time)
**** Word for Family Merge  (Optionally inserted before the location)

Sample

Recording System Elements

System elements are used to insert dates and times into your messages. When you edit system elements, the following screen will appear:
If you click on the Scripts button, you will be able to view and change the scripts for each element. For example, the scripts for the days of the week are shown on the following screen.

When you are ready to record, select the item(s) you wish to record in one of the following ways, and click on the Record button.

- Click on the name with your mouse.
- To select a list of items, click on the first item in the range, then hold down your SHIFT key and click on the last item in the range.
To select multiple items that are scattered throughout the list, hold down your CTRL key while clicking on the names.

• Click on the Select All button to select the entire list
• Click on the Select Non Recorded button to select all of the items that have not been recorded.

Next you can click on the “Record” or “Play” buttons to perform voice operations on the list that you have selected.

Identification Options

Identification options can be used to help identify the listener before playing the HouseCalls message.
Here's how it works: The identification greeting is presented, followed by the patient's name, and then the identification instructions.

For example: Hello, this is Shannon from the Southwest Medical Center. If this is (Patient's Name), and you can accept an important message from your doctor, please press the 1 key on your touch tone telephone.

If the patient presses the 1 key, HouseCalls will include the word “Confirmed” in the call status, so you will know that the patient confirmed their identity and accepted the message.

If the patient does not press the 1 key, HouseCalls will attempt to play the identification part of the message over again. It will continue to do this until it reaches the 'Identification Play Count After Answer' limit, as indicated on the HouseCalls Parameters Screen. If the patient does not confirm, HouseCalls will eventually play the message and simply report the call status, without the word “Confirmed” in the status.

Response Options

The following response options can be added to any message to interact with the patient after a message is played:
Save Key – Saves the listener’s response as “Yes”. After the patient presses the 1 Key, HouseCalls will play an additional ending, such as “Thank you for confirming your appointment”. The calls are displayed on the call results report as “Answered – Yes”.

Repeat Key – Repeats the message for the patient. After the message is replayed, the patient will be presented with the response options once again. If the listener only replays the message, the call status will be shown as “Answered – Repeated Message”.

Record Key – Records a message after the tone. This allows the patient to leave a message for the office. The call will be indicated as “Answered – Left Message” on the report.

Optional Message Key – Plays an optional message for the patient, such as directions to the office. After the optional message is played, the response options will be repeated.

No Key – Saves the listener’s response as “No”. After the patient presses the 5 Key, HouseCalls will play an additional ending, such as “We’re sorry that you will be unable to make your appointment. Please call our office to reschedule…” The result report will show “Answered – No”.

Survey Key - Allows the user to take an optional Survey. This survey module is a separate plug-in to the HouseCalls Software. Please contact TeleVox Software at 800-644-4266 for additional information and pricing.

Transfer Key – Rings the receptionist for assistance. If the call is made during office hours, the response 0 key can be used to ring the receptionist. HouseCalls can ring the receptionist in one of three ways: ringing the local HouseCalls PC, transferring to an extension, or performing a conference call to another number (types of transferring permitted are dependent on your voice board and your phone system).

Rotary – The rotary response option records a message after the tone for patients that do not have a touch tone phone. A patient can be marked as “Rotary” from the shortcut menu on the calling page or on the patient update screen.
You may type your new instructions and message to play and record them here. To record an item, click on the letter next to the script, and a recording dialog will appear. When you're finished recording, click on the Stop button. Choose Exit to finish.
Message Retrieval Prompts are utilized when staff members choose to call in to the HouseCalls System to pick up their messages. These prompts are used to guide staff members through retrieving any messages that patients have left, as well as any out of order messages that may have been collected during the calling process.

These prompts can be accessed from the Voice Manager screen. The sample voice has all of the prompts prerecorded, and you may customize the prompts for each voice to personalize the Message Retrieval System.

Simply type in the text that you wish to record, and click on the Record button. HouseCalls will prompt you to pick up the phone, and you can begin recording when prompted. Click on the Stop button from the recording screen when you are finished. To listen to the prompt, click Play.
A green check will appear when an item has been recorded, and a red X shows that the item has not been recorded. To continue recording the prompts, click the Next button. You will notice that the progress bar will begin to fill in as you move forward.

Some of the recordings may only be a few words, some will be fragments of a sentence, and some will be complete sentences. If possible, try to control the inflection of your voice to match how you would say each item, as if you were speaking the entire sentence.

When you are finished recording all of the prompts, click on the Finish button. If you need to change any of the recordings at a later time, simply re-record the prompts that you wish and click on Finish to save the new recordings.

You may also click on Cancel to exit this screen without saving any of the changes or recordings.

Also, be sure to record your system elements (found in the Voice Manager), including days, months, numbers, dates, and the alphabet. All of these elements are used in conjunction with the prompts to announce the number of messages, dates, phone numbers, and even spell names if needed.
Recording Doctors, Locations, and Procedures

Here we will show how to record and edit a list of doctors, and you can apply the same method for your locations and procedures. From the Voice Manager, if you select Doctors and Edit Selection, a list of your current doctors will appear.

To record or play the doctor names, select the doctor's name(s) and click either Play or Record.

If you would like to edit your current doctors, locations, or procedures, you can select the “Edit” button, and an appropriate maintenance screen will appear.

Build Messages

When you have completed all voice recording, it is then time to put all your voice recordings together and build your messages.
Reports

Call Results Reporting

Accessing Results

After HouseCalls has finished calling, a summary of each call status will appear. You can print this summary by clicking on the small printer on the right side of the Print Preview window. To close the summary table, click the close door on the right side of the Print Preview window.

After closing the summary table, you may choose to view or print the Call Result Report for the completed calling session.
If you would like to view the calling activity for a date range, select the Results icon from the main toolbar. You can select the starting date and the ending date, then send the report to either the screen or to the printer.
**Call Result Reporting**

The Reports function gives you a detailed report of calling activity and can give you a report of calling activity based on doctor, location or both (combined).

To access reports, click Reports from the main menu. Select the start date and end date for your report. You may also choose to include only specific doctors, locations, or messages on the report by placing a checkmark in the appropriate box, and selecting the item from the drop-down menu. To view the report, choose Screen Output. If you want to print the report without viewing it, select Printer Output.

<table>
<thead>
<tr>
<th>Call Results Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date</strong>: Friday, October 17, 2003</td>
</tr>
<tr>
<td><strong>End Date</strong>: Friday, October 17, 2003</td>
</tr>
<tr>
<td><strong>Include Only a Specific Doctor</strong></td>
</tr>
<tr>
<td><strong>Doctor</strong>: Dr. George Hall</td>
</tr>
<tr>
<td><strong>Include Only a Specific Location</strong></td>
</tr>
<tr>
<td><strong>Location</strong>: The Main Office</td>
</tr>
<tr>
<td><strong>Include Only a Specific Message</strong></td>
</tr>
<tr>
<td><strong>Message</strong>: Standard Appt</td>
</tr>
</tbody>
</table>

If viewing the report, you can print the report by clicking on the small printer on the right side of the Print Preview window. To close the summary table, click the close door on the right side of the Print Preview window.
**Call Results Graphics**

You can also access graphs for your call reports in the form of a bar graph or pie chart. To utilize this function, choose Call Results Graphics from the Reports drop-down menu. Then, select the type of graph that you would like your report to be generated on.
Here, you can select what type of graph or chart that you would like to view. If you choose to graph monthly comparisons, you can see how the call results compare over a number of months.

The following are examples of a Call Results Summary Bar Graph and a Call Results Summary Pie Chart:
Call Statuses

HouseCalls is capable of detecting the following call statuses:

- Answered – Called for Receptionist
- Answered – Hung Up
- Answered – No
- Answered – No Response
- Answered – No Touch Tones Requested
- Answered – Left Message
- Answered – Repeated Message
- Answered – Rotary Message
- Answered – Yes
- Answering Machine
- Answering Machine – Message Not Played
- Called – No Answer
- Dial Tone Not Detected
- Invalid Phone Number
- Message Not Assigned
- Multiple Calls Restricted
- Name Not Recorded
- Never Call
- Not Called
- Out of Order
- Phone Too Busy

If you are confirming the identity of the patient before playing the message, the following status codes can also be generated:

- Answered – Confirmed Called for Receptionist
- Answered – Confirmed Hung Up
- Answered – Confirmed Left Message
- Answered – Confirmed No
- Answered – Confirmed No Response
- Answered – Confirmed No Touch Tones Requested
- Answered – Confirmed Repeated Message
- Answered – Confirmed Yes
Email Schedule

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule. To setup the Call Results Report to be emailed, you must first setup an Email Schedule.

**Setting up a Call Results Email Schedule**

- Choose Reports from the pull down menu
- Choose Call Results Email Schedule
- You will now be prompted to enter in the necessary information to successfully Email the Call Results Report.
- To add a new Email Schedule, choose Add, and type in a Description in the appropriate field.
- Next, type in a valid email address in the To: field (whom the report is sent to) and a valid email address in the From: field (whom the report is from).
- Next, choose how you want the report to be sorted: combined, by doctor, by location, by location & doctor, by doctor & procedure, export file, or summary page.
- You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.
- Finally, setup the days you want the report to be emailed. By placing a check mark in the appropriate day of the week, you are enabling the report to be emailed immediately following a HouseCalls Calling Session.
HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule. To setup the Call Results Report to be faxed, you must first setup a Fax Schedule.

### Setting up a Call Results Fax Schedule

- Choose Reports from the pull down menu
- Choose Call Results Fax Schedule
- You will now be prompted to enter in the necessary information to successfully Fax the Call Results Report.
- To add a new Fax Schedule, choose Add, and type in a Description in the appropriate field.
- Next, type in a valid fax/ phone number, including any dialing prefixes or suffixes.
- Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.
You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.

If desired, you may include a cover sheet with the Call Results Report. Simply, place a check mark in the Include Cover Sheet check-box and type in the information you want to appear on your Cover Page.

Finally, setup the days you want the report to be faxed. By placing a check mark in the appropriate day of the week, you are enabling the Report to be faxed immediately following a HouseCalls Calling Session.

Print Schedule

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule.

There are two ways to setup the Call Results Report to print automatically.
• **Auto-Print**

Auto-Print is an easy way to set HouseCalls to print the Call Results Report after each Calling Session. See directions on setting up auto-printing in either Classic View or Wizard View.

• **Print Schedule**

Setting up a Printing Schedule is for the advanced HouseCalls user who needs to specify what days to print the report and also to designate what printer the report is to be printed to. To see directions on setting up a print schedule, continue reading through the following directions.

**Setting up Auto-Printing** (for the novice user)

**Classic View**
- Choose Maintenance from the pull down menu
- Choose Parameters
- Click the Advanced button
- On the Advanced Calling Parameter screen, place a check mark in Auto-Print Report. Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

**Wizard View**
- Choose Maintenance from the pull down menu
- Choose Parameters
- Choose the Print/ Email/ Fax Options tab
- Under the Call Result Report section, place a check mark in Auto-Print Report. Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

**Setting up a Call Results Print Schedule** (for the advanced user)

- Choose Reports from the pull down menu
- Choose Call Results Print Schedule
- You will now be prompted to enter in the necessary information to successfully Print the Call Results Report.
- To add a new Print Schedule, Choose Add, and type in a Description in the appropriate field.
- Next, click the Select button and choose the printer you want HouseCalls to print to from the drop down menu. When the correct printer is selected, choose OK.
- Next, choose how you want the report to be sorted: combined, by doctor, or by location.
You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.

Finally, setup the days you want the Report to be printed. By placing a check mark in the appropriate Day of the Week, you are enabling the Report to be printed immediately following a HouseCalls Calling Session.

Additional HouseCalls Reports

There are many types of reports you can print within the HouseCalls program. To access the various types of reports, choose Reports from the drop-down menu.

Below is a list of some of the more common type of reports you may choose to generate within HouseCalls.
Calling Page Entries

This option gives you a report for a specific calling page day. This reports details the patient name, type of appointment, time of appointment, phone number and status of the call.

You are allowed to sort this list alphabetically (patient) or by the time of the daily appointments (time).

<table>
<thead>
<tr>
<th>Time</th>
<th>Name/Notes</th>
<th>Number</th>
<th>Phone Number</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00A</td>
<td>RUSSELL, STEVE</td>
<td>17144.00</td>
<td>(251)555-1478</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>8:00A</td>
<td>WILLIAMS, SHARON</td>
<td>17163.00</td>
<td>(251)555-1470</td>
<td>Answered - No</td>
</tr>
<tr>
<td>8:30A</td>
<td>MCKOY, MERLE</td>
<td>17145.00</td>
<td>(251)555-8783</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>8:30A</td>
<td>GLOVER, MICHAEL</td>
<td>17164.00</td>
<td>(251)555-9030</td>
<td>Answered - No</td>
</tr>
<tr>
<td>9:00A</td>
<td>SPAIN, CAROL</td>
<td>17146.00</td>
<td>(251)555-3717</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>9:00A</td>
<td>CUEVAS, ROBERTO</td>
<td>17165.00</td>
<td>(251)555-8115</td>
<td>Answered - No</td>
</tr>
<tr>
<td>9:30A</td>
<td>MOISLEY, RYAN</td>
<td>17166.00</td>
<td>(251)555-1956</td>
<td>Answered - Left Message</td>
</tr>
<tr>
<td>9:30A</td>
<td>STEWART, ROBERTA</td>
<td>17147.00</td>
<td>(251)555-2991</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>10:00A</td>
<td>AUMAN, GARY</td>
<td>17167.00</td>
<td>(251)555-8863</td>
<td>Answered - Left Message</td>
</tr>
<tr>
<td>10:00A</td>
<td>THAMES, SHERRY</td>
<td>17148.00</td>
<td>(251)555-2825</td>
<td>Answered - Yes</td>
</tr>
</tbody>
</table>
| 10:30A| LEON, ERIN     | 17168.00  | (251)555-0879     | Phone Too Busy
**Patient Listing**

This feature gives a master list of all patients in the HouseCalls database. You can sort this list either by patient name (alphabetical) or patient number (numerical).

<table>
<thead>
<tr>
<th>Patient List</th>
<th>Home Call</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>HARDISON, SANDRA</td>
<td>Home</td>
<td>(251)555-5475</td>
</tr>
<tr>
<td>BAKER, MARTHA</td>
<td>Home</td>
<td>(251)555-4467</td>
</tr>
<tr>
<td>STRICKLAND, ROBIN</td>
<td>Home</td>
<td>(251)555-2613</td>
</tr>
<tr>
<td>WARREN, DONALD</td>
<td>Home</td>
<td>(251)555-1900</td>
</tr>
<tr>
<td>CESSNA, SARAH</td>
<td>Home</td>
<td>(251)555-9431</td>
</tr>
<tr>
<td>HORNE, ADAM</td>
<td>Home</td>
<td>(251)555-9666</td>
</tr>
<tr>
<td>ODRISCOLL, CINDY</td>
<td>Home</td>
<td>(251)555-5465</td>
</tr>
<tr>
<td>WILLIAMS, SHARON</td>
<td>Home</td>
<td>(251)555-1470</td>
</tr>
<tr>
<td>GLOVER, MICHAEL</td>
<td>Home</td>
<td>(251)555-9030</td>
</tr>
<tr>
<td>CUEVAS, ROBERTO</td>
<td>Home</td>
<td>(251)555-8115</td>
</tr>
</tbody>
</table>

**System Details**

Positioned under the Reports drop-down menu, System Details allows you to access reports for several components of HouseCalls. You can obtain the following information in report form simply by choosing the detail you want to view or print. Below is an example of a print out of Current Messages.
HouseCalls™ Messages

<table>
<thead>
<tr>
<th>Msg No:</th>
<th>1</th>
<th>Description</th>
<th>Standard Appt</th>
<th>Voice</th>
<th>Sample</th>
<th>No.</th>
<th>9</th>
</tr>
</thead>
</table>

**Message Elements:**
- Greeting #1
- First Name
- Subject #1
- Doctor's Name
- ON
- Date
- SCHED_FOR
- Time
- Ending #1
- 1 Key Instruction #1
- 2 Key Instruction #1
- 3 Key Instruction #1
- 1 Key Ending #1

**Current Message:**

Good evening, this is Rachel Armstrong from the Medical Center. I am calling with a quick reminder for (Patient's First Name Merge) that you have an appointment with (Doctor Merge) ON (Date Merge) SCHED_FOR (Time Merge). We are looking forward to seeing you then.

Please press the 1 key on your touch tone telephone if you can confirm your appointment at this time.

Press the 2 key if you would like to replay this message.

Press the 3 key if you would like to leave us a message. You may start recording after the tone, and you may hang up when your message is complete.

Thank you for confirming your appointment. We look forward to seeing you soon.
HouseCalls 7.5 Wizard View

HouseCalls Wizard View offers an "easy to use" user interface. Almost all features within the program can be accessed by simply choosing the appropriate icon in the list bar located on the left side of the HouseCalls screen.

Wizard View requires the use of the Schedule Manager during the calling sessions.

For additional information on any of the icons located in HouseCalls Wizard View, select the icon from the images below.
What steps are involved in bringing data from your scheduling software into HouseCalls?

Typically, our system installers set up every HouseCalls customer with a “Daily Routine”. In other words ... What steps are involved in bringing my current data into HouseCalls?

Though the steps may be different for each customer, they generally have similar steps. The first step is to print to file the reports that will be used by HouseCalls to make calls. These can be appointment reports, recall reports, no-show summaries, birthday listings, and more. Our installers will show you what steps to take when printing these reports, so that a data file will be created at the same time. Once you have generated these reports, HouseCalls will have the files that it needs to get started.

Simply double-click on the HouseCalls icon, and the system will automatically see that you have new files to import. You will be able to see your patients scrolling across the screen. When it has finished importing, HouseCalls will show your patients on the main calling page, then it will step you through reviewing the calling data, building a calling list, and setting up a calling schedule. It’s that simple!
Editing the Calling Page Information

After the data has been imported, you can review the calling information and change any entry. Simply highlight a patient from the calling page by clicking on the patient’s name. If you click the right mouse button, you will see a shortcut menu that will let you change anything about the selected items.
This shortcut menu is especially helpful in changing information that involves multiple calling entries. In this way, you can manipulate multiple items easily. Here are some tips on selecting patients:

- Click with your left mouse button to select a single patient.
- Hold down the SHIFT key, and click with the left mouse button to select a range of patients.
- Hold down the CTRL key, and click with the left mouse button to select multiple patients that are spread throughout the calling page.

If you want to edit the information on a single patient, click the Edit button on the toolbar. This will bring up the Calling Page Information screen where you will be able to change the calling information for this particular patient.

Also, if manually adding a patient to the calling page, the Calling Page Information screen allows you to set the appointment information. The information changed on this screen takes effect for this calling page only.

To edit Patient Information, such as phone number or address, click the Patient Info button to go to the Patient Update Screen.
If you would like to record or play the Patient’s name, choose Record or Play respectively. Note: This records the individual name recording, not the library of name recording.

**Calling Page Information**

**Calling Page Information**

<table>
<thead>
<tr>
<th>Patient: 7:00 - RJ Spreckelsen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calling Page: Friday, October 17, 2003</td>
</tr>
<tr>
<td>Time: 8:00 AM</td>
</tr>
<tr>
<td>Special Dose: /</td>
</tr>
<tr>
<td>Language: English</td>
</tr>
<tr>
<td>Rotary Phone: ☑</td>
</tr>
<tr>
<td>Never Call: ☑</td>
</tr>
<tr>
<td>Never Leave Msg on Ans Machine: ☑</td>
</tr>
</tbody>
</table>

**Notes:**

---

**Date**

If you want to navigate to other calling page dates, you can select the “Date” icon from the main toolbar. In addition, the left arrow will take you to the previous day, the right arrow will take you to the next day, and the schedule book will bring you back to the current day.

By clicking on the Date icon, you can select a specific calling page day to view.
Add a Patient

On occasion, you may want to manually add a calling entry or a patient into the system.

- To manually add a patient to the calling page, choose Add from the top icon bar; a search screen will appear.
- In the 'Search by' field, select what information you want to search for... Patient Name, Patient Number, Phone Number, or Reference Number.
- In the 'Find' box, type in the text you wish to search for and click Find.
A list of results will appear in the bottom window. If the patient you are searching for is not in the system, you may click the New button to go to the Patient Update Screen where you may manually add the patient to the HouseCalls system.

Highlight the patient you were searching for and click Select.

The Calling Page Information Screen will now appear where you may enter appointment information, such as the calling page date/time, the message which will be assigned, the doctor, location, procedure, and much more.
Delete A Patient from Calling Page

If you need to delete a patient from the calling page, highlight the patient and choose the Delete button. Or you may highlight the patient and press the DELETE key on your keyboard.

If you need to delete several patients from the calling page, here are some tips:

- Click with your left mouse button to select a single patient.
- Hold down the SHIFT key, and click with the left mouse button to select a range of patients.
- Hold down the CTRL key, and click with the left mouse button to select multiple patients that are spread throughout the calling page.

Exit

To Exit the HouseCalls program, choose the Exit button. This will close the HouseCalls application.
Schedule List

The schedule list shows all calling lists that have been built. You can highlight a schedule and select the Details button to view the specifics about that calling session.

All active schedules (schedules that have not completed) are also shown in the Schedule Manager.

Get Messages

This function allows you to retrieve messages left by patients on the HouseCalls system. To retrieve messages, click on the Get Messages icon under the Main group. At this time, HouseCalls will retrieve any messages that were recorded during the last calling session.
When you retrieve messages, HouseCalls will display the screen below. Here, you can see the patient’s name, the appointment date, and the appointment time. If you select Play, you can pick up the HouseCalls handset and listen to the message. You can play the message as many times as you like by clicking on the Play button. If you want to delete the message, you can click on the Delete button. The Next button will take you to the next message.

In addition, you can access specific messages by highlighting the patients on the calling page. Next, select Program from the drop-down menu, and choose Retrieve Messages for Selected Patients.

Call Results Reporting

Call Result Reporting

The Reports function gives you a detailed report of calling activity and can give you a report of calling activity based on doctor, location or both (combined).

To access reports, click the Reports button from the Main Group Menu, or choose Reports drop-down menu, then Call Results Reporting | Call Results Wizard.

You may select from two types of reports. A Report by Call List allows you to choose an existing calling schedule and print the results. A Report by Date Range, allows you to print the results for a given date range. After you have selected your report type, click Next.
1) **Report by Call List**

From the drop-down menu, choose the schedule name from the list. After choosing the call list, click Next.
You may choose to include only specific doctors, locations, or messages on the report by placing a checkmark in the appropriate box, and selecting the item from the drop-down menu. Once you have chosen your report format, click Next.

If you choose to print a Combined Report, the results will be sorted by calling statuses only. If sorting By Doctor or By Location, the report will group those items together, then sort by calling statuses.

To view the report, choose Screen Output. If you want to print the report without viewing it, select Printer Output.

After choosing your sort order and destination for the report, choose Finish to generate your call results report.
2) **Report by Date Range**

Select the range of dates to include on the report. After choosing the start date and end date, click Next.
You may choose to include only specific doctors, locations, or messages on the report by placing a checkmark in the appropriate box, and selecting the item from the drop-down menu. Once you have chosen your report format, click Next.

If you choose to print a Combined Report, the results will be sorted by calling statuses only. If sorting By Doctor or By Location, the report will group those items together, then sort by calling statuses.

To view the report, choose Screen Output. If you want to print the report without viewing it, select Printer Output.

After choosing your sort order and destination for the report, choose Finish to generate your call results report.
If viewing the report, you can print the report by clicking on the small printer on the right side of the Print Preview window. To close the summary table, click the close door on the right side of the Print Preview window.
Call Results Graphics

You can also access graphs for your call reports in the form of a bar graph or pie chart. To utilize this function, choose Call Results Graphics from the Reports drop-down menu. Then, select the type of graph that you would like your report to be generated on.
Here, you can select what type of graph or chart that you would like to view. If you choose to graph monthly comparisons, you can see how the call results compare over a number of months.

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- Answered – Left Message
- Answered – Repeated Message
- Answered – Rotary Message
- Answered – Yes
- Answering Machine
- Answering Machine – Message Not Played
- Called – No Answer
- Dial Tone Not Detected
- Invalid Phone Number
- Message Not Assigned
- Multiple Calls Restricted
- Name Not Recorded
- Never Call
- Not Called
- Out of Order
- Phone Too Busy

If you are confirming the identity of the patient before playing the message, the following status codes can also be generated:

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- Answered – Confirmed Hung Up
- Answered – Confirmed Left Message
- Answered – Confirmed No
- Answered – Confirmed No Response
- Answered – Confirmed No Touch Tones Requested
- Answered – Confirmed Repeated Message
- Answered – Confirmed Yes
Filters

A Filter allows the user to only select certain calls that meet specified criteria. For example, the most common type of filter is a “Message Filter”. A message filter would tell HouseCalls to only place phone calls for certain messages, i.e. Appointment, No-Show, Recall, Birthday, etc.

Creating Filters

To open Filters, choose the Filter icon under the Main group menu. To create a filter, click the Add button. At the next screen, type in a filter name and description. Place a check mark next to the appropriate type of filter you want to create. The most common type of filter is a “Message Filter”, which filters out phone calls based on the message assigned to each patient. Once the appropriate box is checked, it will enable a button; click this button.

![Calling List Filters](image)
At the next screen select the items you want included in this filter. For example, if you are creating a filter to only call appointments, drag and drop the appointment message(s) from the left side to the right side. The left window shows the Available Voice Messages, while the right window shows your Selected Voice Message. Once your filter has been added, click Save, then Exit to exit the filter window.
Messages Group

Message Builder

The Message Builder is the place in HouseCalls where you put all of your recorded pieces together. You can access the Message Builder by choosing Message Builder under the Messages tab.

How to Build a Message

The message builder allows you to create the messages that will be sent to your patients. Once you build a message, you can use it as many times as you like without ever having to rebuild it. You can even edit a message at any time. Building a message is relatively simple. Follow these steps:

1. Under the Messages group, click the Build Message icon.
2. Before you arrange the elements of your message, you must assign your message a message number. From the drop-down message number box, choose the message number that you want this message to be assigned to. Give the message a brief description in the 'Description' box.
3. Choose the voice that you want assigned to this message, then click on Edit.
4. To begin making the message, click Add Element.
5. Here, you order the individual components of this message. Under each element (greeting, ending, subject, etc.), you may choose an element (or record a new element) to place in your message. For example, highlight the greeting that you want to use and choose Select. If you do not see the greeting that you want to use, simply make the one that you want “on the fly”. To record a new greeting, first click on Greeting on the message element page. Next, click the Greeting icon at the bottom of the screen. Now, type your greeting and then record using the Record button.
6. Continue to add elements to your message until it is complete.
7. When your message is complete, choose Exit. Do not worry if you accidentally add the wrong element. The 'Rearrange and Delete Screen' will help you to position your elements in the right order, and delete any unwanted items.
8. Now, the 'Edit Message' screen appears. To finalize your message, click Response Options.
9. Once you select the appropriate response options that you want your patients to have, select Exit. Your message is now complete.
10. Click Verify to make sure that all of your merged elements are present and have been recorded. If you would like to hear your message, click Play and follow the on screen prompts to listen your message.

**Edit Message**

By clicking on Edit in the Message Builder, you access the 'Edit Message' dialog box. This is your destination for compiling the elements of your message. It is also your site for choosing the response options that complete your message.
The Elements screen provides an easy-to-use interface for adding elements to your message:

Simply click on the element that you would like to add, and it will be inserted at the end of the message. Some of the elements may ask you to select from a list of options. For
example, the Greeting selection will pull up a list of your available greetings, where you can choose which greeting to add. When you’re finished adding all the elements, you may exit this screen.

If you need to rearrange or delete any of the message elements, you can select Rearrange/Delete from the Edit Message screen and use the following screen shown below. You may drag an element up or down to move it to a new position. You can also select an element by clicking on it, then delete it by clicking on the Delete button.

**Message Elements**

To add a greeting to your message, select the different greetings that are available on the left panel, and the script that applies will appear in the right panel. When you have selected which element to include, click the Select button.
How to Record a New Greeting

Clicking the Greetings button brings you to the destination for recording a new message greeting. In this way, you can add and record new greetings interactively as you are building a message.

Identification Options

To add the identification section to a message, first access the Message Builder and click on the Edit button. Then select Identification Options from the Edit screen.
You can select which identification greeting to use. Then decide if you want to include the patient’s individual full name, use the library of first names, or the library of last names to speak the name. Finally, select which identification instructions will be presented to the patient for pressing the 1 key to confirm receipt of the message.

After enabling Identification Options, select the ID Keys button to set the actions for each touch tone response.
Response Options

Response options allow for an “interactive” session between HouseCalls and the patient.

After a message has been played to the patient, the patient can be presented with response options as indicated in the following screen.
Select the number from the key pad; this will allow you to set an action from the drop-down menu with that particular touch tone key.

Save Answer as 'Yes' - Saves the listener’s response as “Yes”. After the patient presses the 1 Key, HouseCalls will play an additional ending, such as “Thank you for confirming your appointment”. The calls are displayed on the call results report as “Answered – Yes”.

Repeat the Message - Repeats the message for the patient. After the message is replayed, the patient will be presented with the response options once again. If the listener only replays the message, the call status will be shown as “Answered – Repeated Message”.

Record a Message - Records a message after the tone. This allows the patient to leave a message for the office. The call will be indicated as “Answered – Left Message” on the report.

Play an Optional Message - Plays an optional message for the patient, such as directions to the office. After the optional message is played, the response options will be repeated.

Save Answer as 'No' - After the patient presses the 5 Key, HouseCalls will play an additional ending, such as “We’re sorry that you will be unable to make your appointment. Please call our office to reschedule...”. The result report will show “Answered – No”.
Take a Survey - Allows the user to take an optional Survey. This survey module is a separate plug-in to the HouseCalls Software. Please contact TeleVox Software at 800-644-4266 for additional information and pricing.

Ring the Receptionist - Rings the receptionist for assistance. If the call is made during office hours, the response 0 key can be used to ring the receptionist. HouseCalls can ring the receptionist in one of three ways: ringing the local HouseCalls PC, transferring to an extension, or performing a conference call to another number (types of transferring permitted are dependent on your voice board and your phone system).

Changing your Response Options

To change your response options, click “Change” from the Message Response Options dialog box. Make sure you click change on the number that you would like to change.

You can select from the instructions or endings that appear in the list. As you scroll down the list, you will see the words of the script appear in the right panel. Click on the Select button when you have highlighted the desired option.

If you need to add a new option, you can accomplish this from the change screen. For example, to add a new response 1 key instruction and ending, click on the 1 Key icon. In the dialog box that appears, type in your instructions and message to play.

Click the letter under the Record column next to the fields that contain your new response options. Once you record, you will have a new response option to choose from.

Family Messages - How to Implement in HouseCalls

Family messages can be useful to implement in HouseCalls because they are able to call a household and deliver a message that contains information pertaining to each family member … all in a single phone call. The first step is to set up a family message in the Message Builder. As you can see below, this message has a special “Family First Names, Appointment Times, and Doctors” element in the message content:
Family elements can include the following:

- Names Only
- Names and Times
- Names, Times, and Doctors
- Names, Times, and Procedures
- Times Only
- Times and Doctors
- Locations, Doctors, Subject 1, First Name, Subject 2, Procedures
- Names, Times, and Locations

Next, you will need to indicate where the family message should be assigned. In this way, when HouseCalls see more than one call in the calling list with the same phone number, it will replace the original message on the first call with the family message.

You can assign the family message under Notification Messages found on the parameters screen.
Voice Manager

Deciding What Messages to Create

What makes HouseCalls so wonderful is that the messages are data driven. The system uses information contained in your current patient scheduling system to ‘build’ the content of the messages.

The benefits of data-driven messaging are reflected in the accuracy of the message content. Patients will receive the right information because the messages are based on individual patient data.

For instance, you can probably generate several reports from your current scheduling system. These reports are exactly what HouseCalls uses to import the calling information. This means that anything you see on a report can be included in a message.

Here’s an example of a report (this may look similar to one of your reports):

MARIA HARMON 555-7643 2:00 10/17/2003 RECHECK DR. SMITH PARIS
DARREN MORRIS 555-4691 2:30 10/17/2003 NEW PATIENT DR. MOORE VIENNA

From this data, HouseCalls can call these patients and remind them of their appointment. The message could include:

Greeting: Hello this is Rachel from the Medical Center. I am calling to remind
Patient’s Name: Maria
Subject: that you have an appointment on
Date: Friday, October 17th
Word: scheduled for
Time: 2:00 pm
Doctor: with Dr. Smith
Location: at our Paris Office
Ending: We are looking forward to seeing you then.

HouseCalls can also do something else with this data. Since Darren Morris has “NEW PATIENT” in his appointment notes, HouseCalls can use this information to “map”, or assign, another message. For instance, you may want to send an entirely different message to your new patients, perhaps reminding them to bring their insurance card and giving them directions to the office. HouseCalls has the flexibility to map messages on just about anything.

You may want to look at the different reports that you can generate from your current scheduling system, and use it as a guideline when setting up your HouseCalls messages.
**Voice Manager**

The Voice Manager is the central location for editing voices and recording message elements.

You can access the Voice Manager by clicking the Voice Manager icon under the Messages group. The Voice Manager screen will appear:

Through the Edit Voices button, you can define 9 different voices, irrespective of gender or language. The edit voices function, simply put, is the library that contains the current voices you may use.

The Edit Selection button is one way to change your message elements.

Your scripted elements are the Greetings, Subjects, Endings, and Words. These elements are the “building blocks” for a message.

The system elements include the days of the week, months, numbers, and ordinal dates. These can be scripted to reflect the current language that is assigned to the voice.
Identification options help to identify the listener before playing the message, and in turn, the response options help the listener to respond to the HouseCalls message.

Finally, the merge elements appear at the bottom of the list. These are used to insert information that is related to a specific call for a patient. For instance, the patient’s name can be inserted as the patient’s full name, the library of first names, or the library of last names. The libraries allow you to record a name only once and use it for every patient that has the same name. Other merge elements include: the doctor assigned, any specific doctor messages, the location where the patient should arrive, and the procedure that will be performed.

To record different message elements, choose the element that you wish to edit and click the Edit Selection button.

**Edit Voices**

From the Voice Manager screen, you can select “Edit Voices” to maintain the voices in HouseCalls. Voices are used to identify who is recording the message elements.

To add a voice, simply type the voice name in an open slot. You can have up to 9 different voices in the HouseCalls system. You can also specify the language that will apply to each voice. Simply enter the language number next to the voice name. The Language Screen will allow you to view and update your available languages. By changing the language, the scripts will automatically change for days, months, numbers, and dates.

In addition, if a voice needs to be changed (such as a change of staff), you can modify the voice and change the voice to the new name. By checking “Clear Voices”, HouseCalls will clear any of the previous recordings for each voice that has been updated.
After you have added your voice in HouseCalls, you can select it as the current voice by clicking on the drop-down list of voices. You may then begin adding and recording your message elements.

By clicking on a message element on the left, you will be indicating which element you would like to edit. Then by clicking Edit Selection, HouseCalls will take you to the appropriate editing screen.
Tips on Recording

Before you begin recording, here are a few tips on recording that may help to make your messages sound even better:

- Look at the item that you are about to record, and think of how it fits into the message as whole. Try to control the inflection of your voice to match how you would say it if you were speaking the entire message. Recording each element in this way will allow you to create a great sounding message when you put all the pieces together.
- Try to record in a quiet room or at a time when there is not a lot of background noise.
- Everyone likes to hear a friendly voice, and you will find that this is no exception … especially when you consider how many people will be listening to your messages.
- After you click on the record button, a screen will appear that prompts you to pick up the phone. Before picking up the phone, take a deep breath. Remember to speak clearly, and try to keep your volume level the same.
- Start recording after you are prompted. As soon as you’ve finished recording, click on the stop button. Remember that breathing and noise could be stored in
the recorded item, so try to stop the recording before it has a chance to pick up any unwanted noise.

- After you have recorded the message elements, try building the message and see how it sounds. If needed, you can re-record the message elements as often as you like to get the result that you want.

- The small pictures to the left of each script indicate the current status of each element. A Green Check-mark ✔️ means that the item has been recorded. A Red X ✗ shows that the item has not been recorded. And a Pencil ✏️ indicates that the item is available for scripting.

**Recording Greetings, Subjects, and Endings**

This topic shows you how to record a new Greeting, and it is in this same manner that you can record Subjects and Endings. Here, you can select a blank greeting and click on the Edit button, then type the words of the message that you want to record and choose Save. To record, simply click the Record button and follow the on-screen prompts.
Recording Words

Word elements are single words that are recorded to place within your message. Usually these words are placed before a merge element, such as a time, date, doctor, or location.

To record, type in the word and choose the letter next to the word in the record column.

<table>
<thead>
<tr>
<th>Word</th>
<th>Record</th>
<th>Erase</th>
</tr>
</thead>
<tbody>
<tr>
<td>ON</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>AT</td>
<td>B</td>
<td></td>
</tr>
<tr>
<td>FOR</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>SCHED_FOR</td>
<td>D</td>
<td></td>
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<tr>
<td>WITH</td>
<td>E</td>
<td></td>
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<td>F</td>
<td></td>
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<td>G</td>
<td></td>
</tr>
<tr>
<td></td>
<td>H</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>AT</td>
<td>J</td>
<td></td>
</tr>
</tbody>
</table>

* Word for Family Merge (Inserted before Final Name)  Ex: AND
** Word for Family Merge (Inserted before Time)  Ex: AT
*** Word for Hour  (Inserted after the Hour for Playing International Time)
**** Word for Family Merge  (Optionally Inserted before the location)

Sample

Recording System Elements

System elements are used to insert dates and times into your messages. When you edit system elements, the following screen will appear:
If you click on the Scripts button, you will be able to view and change the scripts for each element. For example, the scripts for the days of the week are shown on the following screen.

When you are ready to record, select the item(s) you wish to record in one of the following ways, and click on the Record button.

- Click on the name with your mouse.
- To select a list of items, click on the first item in the range, then hold down your SHIFT key and click on the last item in the range.
To select multiple items that are scattered throughout the list, hold down your CTRL key while clicking on the names.
• Click on the Select All button to select the entire list
• Click on the Select Non Recorded button to select all of the items that have not been recorded.

Next you can click on the “Record” or “Play” buttons to perform voice operations on the list that you have selected.

Identification Options

Identification options can be used to help identify the listener before playing the HouseCalls message.
Here's how it works: The identification greeting is presented, followed by the patient’s name, and then the identification instructions.

For example: Hello, this is Shannon from the Southwest Medical Center. If this is (Patient’s Name), and if you can accept an important message from your doctor, please press the 1 key on your touch tone telephone.

If the patient presses the 1 key, HouseCalls will include the word “Confirmed” in the call status, so you will know that the patient confirmed their identity and accepted the message.

If the patient does not press the 1 key, HouseCalls will attempt to play the identification part of the message over again. It will continue to do this until it reaches the 'Identification Play Count After Answer' limit, as indicated on the HouseCalls Parameters Screen. If the patient does not confirm, HouseCalls will eventually play the message and simply report the call status, without the word “Confirmed” in the status.

Response options

The following response options can be added to any message to interact with the patient after a message is played:
Save Key – Saves the listener’s response as “Yes”. After the patient presses the 1 Key, HouseCalls will play an additional ending, such as “Thank you for confirming your appointment”. The calls are displayed on the call results report as “Answered – Yes”.

Repeat Key – Repeats the message for the patient. After the message is replayed, the patient will be presented with the response options once again. If the listener only replays the message, the call status will be shown as “Answered – Repeated Message”.

Record Key – Records a message after the tone. This allows the patient to leave a message for the office. The call will be indicated as “Answered – Left Message” on the report.

Optional Message Key – Plays an optional message for the patient, such as directions to the office. After the optional message is played, the response options will be repeated.

No Key – Saves the listener’s response as “No”. After the patient presses the 5 Key, HouseCalls will play an additional ending, such as “We’re sorry that you will be unable to make your appointment. Please call our office to reschedule...”. The result report will show “Answered – No”.

Survey Key - Allows the user to take an optional Survey. This survey module is a separate plug-in to the HouseCalls Software. Please contact TeleVox Software at 800-644-4266 for additional information and pricing.

Transfer Key – Rings the receptionist for assistance. If the call is made during office hours, the response 0 key can be used to ring the receptionist. HouseCalls can ring the receptionist in one of three ways: ringing the local HouseCalls PC, transferring to an extension, or performing a conference call to another number (types of transferring permitted are dependent on your voice board and your phone system).

Rotary – The rotary response option records a message after the tone for patients that do not have a touch tone phone. A patient can be marked as “Rotary” from the shortcut menu on the calling page or on the patient update screen.
**Response Options**

Options can be recorded here which will allow listeners to respond to a particular message.

Here's how it works:

- **Save Key** - Saves the Listener's Response as 'Yes'
- **Repeat Key** - Repeats the Message
- **Record Key** - Records a Message After the Tone
- **Optional Message Key** - Plays an Optional Message
- **No Key** - Saves the Listener's Response as 'No'
- **Survey Key** - Starts a Survey
- **Transfer Key** - Rings the Receptionist for Assistance
- **Rotary** - Records a Message After the Tone

---

**Change Response Option Content**

You may type your new instructions and message to play and record them here. To record an item, click on the letter next to the script, and a recording dialog will appear. When you’re finished recording, click on the Stop button. Choose Exit to finish.
Message Retrieval Prompts

Message Retrieval Prompts are utilized when staff members choose to call into the HouseCalls System to pick up their messages. These prompts are used to guide staff members through retrieving any messages that patients have left, as well as any out of order messages that may have been collected during the calling process.

These prompts can be accessed from the Voice Manager screen. The sample voice has all of the prompts prerecorded, and you may customize the prompts for each voice to personalize the Message Retrieval System.

Simply type in the text that you wish to record, and click on the Record button. HouseCalls will prompt you to pick up the phone, and you can begin recording when prompted. Click on the Stop button from the recording screen when you are finished. To listen to the prompt, click Play.
A green check will appear when an item has been recorded, and a red X shows that the item has not been recorded. To continue recording the prompts, click the Next button. You will notice that the progress bar will begin to fill in as you move forward.

Some of the recordings may only be a few words, some will be fragments of a sentence, and some will be complete sentences. If possible, try to control the inflection of your voice to match how you would say each item, as if you were speaking the entire sentence.

When you are finished recording all of the prompts, click on the Finish button. If you need to change any of the recordings at a later time, simply re-record the prompts that you wish and click on Finish to save the new recordings.

You may also click on Cancel to exit this screen without saving any of the changes or recordings.

Also, be sure to record your system elements (found in the Voice Manager), including days, months, numbers, dates, and the alphabet. All of these elements are used in conjunction with the prompts to announce the number of messages, dates, phone numbers, and even spell names if needed.
Recording Doctors, Locations, and Procedures

Here we will show how to record and edit a list of doctors, and you can apply the same method for your locations and procedures. From the Voice Manager, if you select Doctors and Edit Selection, a list of your current doctors will appear.

To record or play the doctor names, select the doctor's name(s) and click either Play or Record.

If you would like to edit your current doctors, locations, or procedures, you can select the “Edit” button, and an appropriate maintenance screen will appear.

Build Messages

When you have completed all voice recording, it is then time to put all your voice recordings together and build your messages.
Calling Options Group

Calling Parameters

To open the Parameters screen, choose Maintenance from the drop-down menu, then select Parameters (or select the Parameters icon from the Calling Options Group Menu). You will now be viewing the Calling Parameters screen.

The Parameters screen defines 'how' HouseCalls makes each call. You can customize HouseCalls with your preferences and bypass the default values. Below is a description of each field:

Identification Play Count after Answer: Defines the number of times HouseCalls will play the identification options before it plays the message.

Message Play Count after Answer: The number of times HouseCalls will play a message if it does not receive a touch-tone response.

Repeat Call after Busy Count: The number of times HouseCalls will recall a busy number before it moves on to the next phone number in the calling list. If HouseCalls does bypass a busy phone number, it will try the phone call again after the calling list is finished or in the time specified in "Minutes to Wait Before Retrying Call".

Time (seconds) between Busy Signal: The number of seconds HouseCalls will wait before it re-dials a busy phone number.

Maximum Busy Signals: Defines the number of Busy Signals, or Busy Tones, HouseCalls listens for before determining if a phone number is busy.

Maximum Rings: The number of rings HouseCalls listens for before determining a phone call has not been answered. If HouseCalls determines a status of 'No Answer', HouseCalls will retry that number again in the time specified in "Minutes to Wait Before Retrying Call".

Play Amplification: How loud a message will play.

Record Amplification: Defines the volume at which you record names, greeting, and other message elements.

Max Times to Play on Answering Machine: How many times HouseCalls will leave a message on an answering machine.
Seconds to Wait Between Messages on AM: If HouseCalls is set to leave the message more than once on answering machines, this parameter defines the number of seconds between each message left on the machine.

Seconds to Wait Before Calling: Defines how many seconds HouseCalls will wait between making phone calls.

Minutes to Wait Before Retrying Call: The minimum amount of times that HouseCalls will wait before attempting to recall a patient that it could not reach at an earlier time because of no answer, a busy phone, etc. The number of times HouseCalls will retry different Call Statuses can be defined in Advanced Parameters.

Practice Name (for Patient Login Screen): Defines the default name on the "Patient Login Screen" and the default name to precede the names of Calling Schedules.

Play Device: Determines the type of device used to play messages and message elements.

Record Device: Determines the type of device used to record messages and message elements.

Leave Message on Answering Machine: Determines whether HouseCalls will leave a message on an answering machine when a phone call is placed.

Preview Names Before Recording: Allows the user to preview non-recorded names during the build list process before recording.

Select Rotary for New Patients: Will automatically assign "Rotary Phone" to any new patients that are added into the HouseCalls system.

Allow Multiple Calls Per Patient: Determines if HouseCalls should make multiple phone calls to the same household if the patients have the same phone number. For example, if two family members have appointments on the same day, HouseCalls can either make two separate phone calls, one to each family member, or it can restrict one of the numbers to give the appointment information for both patients in one message. If you decide to restrict multiple calls, you have the option of creating 'Family Messages' that combine all appointment information for multiple family members into one consolidated message. After a family message is created, you must setup Notification Messages.

Auto Delete Outdated Messages Over: This field lets the user specify the number of days before HouseCalls automatically deletes messages left by patients.

Use Default Recording if Missing: Allows the user to use default merge recordings if the message is missing a recording.

Restrict Calls: Determines how HouseCalls defines Multiple Calls Restricted (Family Message); either by phone number or an account number. The default setting is to restrict by 'Home Phone'.

Date Format: Determines how HouseCalls plays the date in a message. The default setting is to play the 'Ordinal'.
Notification Messages: Allows the user to setup 'Family Messages'. See detailed instructions on setting up Notification Messages.

Volume Demo: Allows the user to listen to the different volume level available with HouseCalls.

Local Area Codes

In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

To enter the Local Area Codes, choose the Local Area Codes icon from the Calling Options Group (or choose Maintenance from the drop down menu, select Add/Modify Delete Records and choose Local Area Codes). This will open a window that will allow you to add, edit, or delete the local area codes in your area. To add a new local area code, select the Add button and type in your 3-digit local area code.
In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

Local Exchanges can best be defined as phone numbers that must be dialed as local numbers, either with or without the area code.

To enter Local Exchanges, choose the Local Exchanges icon from the Calling Options Group (or choose Maintenance, select Add/Modify Delete Records and choose Local Exchanges). This will open a window that will allow you to add, edit, or delete the local exchanges in your area. To add a new local exchange, select the Add button and type in your 3-digit or 6-digit local exchange.

3-digits vs. 6-digits
If you need numbers within a local area code to be dialed as 7-digit local numbers, you need to choose add and type in only the 3-digit exchange (the portion after the area code). If you need numbers within a local area code to be dialed as 10-digit local numbers, you need to choose add and type in the 6 digit exchange ... area code + the 3 digit exchange.
If you are setting up 10-digit dialing (metro) for all numbers in an area code, you may simplify the process by running a program called metros6.exe located in the HouseCalls directory.

**Long Distance Exchanges**

In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

Long Distance Exchanges can best be defined as phone numbers within your local area code that must be dialed as long distance ... with a '1' preceding the area code.

To enter Long Distance Exchanges, choose the Long Distance Exchanges icon from the Calling Options Group (or choose Maintenance, select Add/Modify Delete Records and choose Long Distance Exchanges). This will open a window that will allow you to add,
edit, or delete the long distance exchanges in your area. To add a new long distance exchange, select the Add button and type in the area code + the exchange (6 digits).

Elements Group

Doctors

To access a listing of all Doctors, choose the Element Group and select the Doctors Icon. From this screen you have the ability to add new Doctors by choosing the Add button; you may highlight a Doctor and Edit their information; or you may highlight a Doctor and choose to Delete them from the system. You may also Record or Play their name by choosing the appropriate icon from the menu bar. The Voice button allows you to switch to a different recording voice.
Another place within the HouseCalls system to record or play the doctor name is within the Voice Manager. In addition, you may Add, Edit, or Delete Doctors by choosing Add/Modify/Delete from the Maintenance menu.

### Doctors (Voice: Cindy)

<table>
<thead>
<tr>
<th>Doctor Num</th>
<th>Doctor Name</th>
<th>Recorded</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>The Medical Center</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Dr. George Hall</td>
<td></td>
</tr>
</tbody>
</table>

### Patients

To access a listing of all Patients in the HouseCalls system, choose the Element Group and select the Patients Icon. From this screen you have the ability to add new Patients by choosing the Add button; you may highlight a Patient and Edit their information; or you may highlight a Patient and choose to Delete them from the system. You may also Record or Play the Patient name by choosing the appropriate icon from the menu bar. The Voice button allows you to switch to a different recording voice.

Another place within the HouseCalls system to record or play the Patients Full Name is within the Voice Manager. If you are using the library of first names in your messages, then you do not want to record the patient name here, but instead within the Voice Manager. In addition, you may Add, Edit, or Delete Patients by choosing Add/Modify/Delete from the Maintenance menu.

### Patients (Voice: Cindy)

<table>
<thead>
<tr>
<th>Patient Num</th>
<th>Patient Name</th>
<th>Recorded</th>
</tr>
</thead>
<tbody>
<tr>
<td>15573</td>
<td>Smith, Kelly</td>
<td>No</td>
</tr>
<tr>
<td>15574</td>
<td>Smith, Mary</td>
<td>No</td>
</tr>
<tr>
<td>15570</td>
<td>Smith, Steffanie</td>
<td>No</td>
</tr>
</tbody>
</table>
Locations

To access a listing of all Locations, choose the Element Group and select the Locations Icon. From this screen you have the ability to add new Locations by choosing the Add button; you may highlight a Location and Edit their information; or you may highlight a Location and choose to Delete it from the system. You may also Record or Play the Location name by choosing the appropriate icon from the menu bar. The Voice button allows you to switch to a different recording voice.

Another place within the HouseCalls system to record or play the Location name is within the Voice Manager. In addition, you may Add, Edit, or Delete Locations by choosing Add/Modify/Delete from the Maintenance menu.

Procedures

To access a listing of all Procedures, choose the Element Group and select the Procedures Icon. From this screen you have the ability to add new Procedures by choosing the Add button; you may highlight a Procedure and Edit their information; or you may highlight a Procedure and choose to Delete it from the system. You may also Record or Play the Procedure name by choosing the appropriate icon from the menu bar. The Voice button allows you to switch to a different recording voice.
Another place within the HouseCalls system to record or play the Procedure name is within the Voice Manager. In addition, you may Add, Edit, or Delete Procedures by choosing Add/Modify/Delete from the Maintenance menu.

### Schedules Group

#### Print Schedule

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule.

There are two ways to setup the Call Results Report to print automatically.

- **Auto-Print**

  Auto-Print is an easy way to set HouseCalls to print the Call Results Report after each Calling Session. See directions on setting up auto-printing in either Classic View or Wizard View.

- **Print Schedule**

  Setting up a Printing Schedule is for the advanced HouseCalls user who needs to specify what days to print the report and also to designate what printer the report is to be printed to. To see directions on setting up a print schedule, continue reading through the following directions.

**Setting up Auto-Printing** (for the novice user)
Classic View
- Choose Maintenance from the pull down menu
- Choose Parameters
- Click the Advanced button
- On the Advanced Calling Parameter screen, place a check mark in Auto-Print Report. Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

Wizard View
- Choose Maintenance from the pull down menu
- Choose Parameters
- Choose the Print/ Email/ Fax Options tab
- Under the Call Result Report section, place a check mark in Auto-Print Report. Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

Setting up a Call Results Print Schedule (for the advanced user)
- Choose Reports from the pull down menu
- Choose Call Results Print Schedule
- You will now be prompted to enter in the necessary information to successfully Print the Call Results Report.
- To add a new Print Schedule, Choose Add, and type in a Description in the appropriate field.
- Next, click the Select button and choose the printer you want House Calls to print to from the drop down menu. When the correct printer is selected, choose OK.
- Next, choose how you want the report to be sorted: combined, by doctor, or by location.
- You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.
- Finally, setup the days you want the Report to be printed. By placing a check mark in the appropriate Day of the Week, you are enabling the Report to be printed immediately following a House Calls Calling Session.
Fax Schedule

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule. To setup the Call Results Report to be faxed, you must first setup a Fax Schedule.

Setting up a Call Results Fax Schedule

- Choose Reports from the pull down menu
- Choose Call Results Fax Schedule
- You will now be prompted to enter in the necessary information to successfully Fax the Call Results Report.
- To add a new Fax Schedule, choose Add, and type in a Description in the appropriate field.
- Next, type in a valid fax/phone number, including any dialing prefixes or suffixes.
Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.

If desired, you may include a cover sheet with the Call Results Report. Simply, place a check mark in the Include Cover Sheet check-box and type in the information you want to appear on your Cover Page.

Finally, setup the days you want the report to be faxed. By placing a check mark in the appropriate day of the week, you are enabling the Report to be faxed immediately following a HouseCalls Calling Session.

**Fax Call Results**

**Call Results Fax Schedule**

- **Fax Id No:** 1
- **Description:** Fax to TeleVox Software, Inc.
- **Fax Dialing String:** 1-334-633-2420

**Send Call Results Report:**
- **Combined**
- **By Doctor**
- **By Location**
- **By Location & Doctor**

**Selection Criteria:**
- **Include Only Specific Doctors**
- **Include Only Specific Locations**
- **Include Only Specific Messages**

**Include Cover Sheet:**
- **Include Only Calls Where the Patient was Not Contacted**

**Send To:** Company Name: TeleVox Software, Inc.
- **Attention:** Test Fax
- **Notes:** Attached is the HouseCalls Call Results Report.

**Last Fax Sent On:** 04/17/1998 5:17P
**Status:** FAX Successfully Completed

**Email Schedule**

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule. To setup the Call Results Report to be emailed, you must first setup an Email Schedule.
Setting up a Call Results Email Schedule

- Choose Reports from the pull down menu
- Choose Call Results Email Schedule
- You will now be prompted to enter in the necessary information to successfully Email the Call Results Report.
- To add a new Email Schedule, choose Add, and type in a Description in the appropriate field.
- Next, type in a valid email address in the To: field (whom the report is sent to) and a valid email address in the From: field (whom the report is from).
- Next, choose how you want the report to be sorted: combined, by doctor, by location, by location & doctor, by doctor & procedure, export file, or summary page.
- You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.
- Finally, setup the days you want the report to be emailed. By placing a check mark in the appropriate day of the week, you are enabling the report to be emailed immediately following a HouseCalls Calling Session.
**Import**

**Bridge**

In its simplest form, a bridge is a feature that filters/converts certain information from your Practice Management System (PMS) and places it in HouseCalls. Bridges allow HouseCalls to gather data from an outside source; in this sense, the bridge connects HouseCalls and the outside data source (in your Practice Management System) to more easily filter, store, and send information.

These bridges operate in a format resembling Boolean Conditionals. To gain access to your bridges, choose Import under the Maintenance drop-down menu, then at the next screen, choose Setup.

**Bridge Setup**

The bridge setup screen lets you access any bridge and the file it is associated with. Here, you can scroll through your bridges and modify the parameters of each.

In the Bridge field, you must enter a specific name for this bridge. All data files are different; therefore, all bridge records/names will treat the data files differently during the converting process.

In the Data File field, you must enter the location and name of the data file that your Practice Management System creates.
Any bridge that is using the Auto Import function must use the Delete File command. You can manually import/convert a data file by choosing Convert; however you usually want the system to automatically import your data file each time you open HouseCalls, so be sure you have a checkmark in Auto Import.

The Bridge Priority box assigns bridge priority to certain files that have more than one bridge assigned to them.

The Convert, View, and Locate buttons are associated with the data file: You can convert, view, or locate a file by using these functions. You can also locate a bridge using the Locate button. The Assign button lets you assign bridges to message types.

### Bridge Layout

The bridge layout screen contains the pertinent information from the data file that is used when HouseCalls builds messages. The format of each field corresponds to that of the converted data file.

If the data file is a Printer file, the column (Col) and length (Len) define where in the data file these items are located. If the file is comma delimited (comma separated), you can specify the order where HouseCalls can locate each field.
To "measure" the column and length, choose the Format button to view the converted file, but only after you have chosen Convert. To "count" the field locations in a comma separated file, choose View File to view the original data file. In short, View File allows you to view the original data file, while Format allows you to view the converted data file.

The Format column specifies the way certain information is displayed in the data file.

<table>
<thead>
<tr>
<th>Column</th>
<th>Format</th>
<th>Col</th>
<th>Len</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>MM/DD/YY</td>
<td>135</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>Time</td>
<td>24:00:00</td>
<td>40</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Patient No</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Patient Name</td>
<td>Unique Last, First</td>
<td>19</td>
<td>15</td>
<td>0</td>
</tr>
<tr>
<td>Telephone</td>
<td>9999999999</td>
<td>175</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>Doctor</td>
<td>Rating</td>
<td>150</td>
<td>25</td>
<td>0</td>
</tr>
<tr>
<td>Column</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Location</td>
<td>Numeric</td>
<td>144</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Procedure</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Message</td>
<td>Mapped</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Misc #1</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Misc #2</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Language</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Volume</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Rotary</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Never Call</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>New Anc Mach</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Spec Purpose Date</td>
<td>MM/DD/YY</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Advanced Bridge Settings**

The pertinent information associated with the Advanced function is the Automatically Add New Doctors, Locations, and Procedures check-boxes. By checking these boxes, you set HouseCalls to automatically add these elements from the PMS data file, eliminating the need for you to manually add this information into the HouseCalls system. When HouseCalls finds new Doctors, Locations, or Procedures, during the import process, it will automatically add them to the system and prompt you to record the elements.

Another important item on this screen is the feature When Area Code is Not Present, Insert: field. This will allow HouseCalls to fill in the area code with a value if it is missing during the importing process.

Auto-Insert Calling Page Date tells HouseCalls that if the date is not present in the data file, automatically import the data to a specific day.
Auto-Insert Purge Dates tells HouseCalls to automatically clear the HouseCalls calling pages for specified days. If using this option, you must also select Purge Calling Page on the bridge name screen.

Message Mapping

By using message mapping, you define a list of conditions for the item specified. For example, you may want to give all New Patients a different message which includes directions to your office.

Other types of mappings, such as a Language Map, tell HouseCalls to deliver messages in a certain language. Likewise, you can create Never Call M aps which would flag certain patients as Never Call and prevent those patients from receiving a phone call from the HouseCalls system.

To implement message mapping, select Message Maps from the Page Layout screen. If this button is disabled (grayed-out), then you must choose the drop-down arrow next to Message and change its value to Mapped. You will see a list of the current message mappings that have been added:
When HouseCalls imports the calling data, it checks the mapping conditions before assigning a message to each patient. In this way, HouseCalls can assign a different message based on the data in your import file. In addition, you can map messages based on multiple fields by joining the conditions with the words “AND” or “OR.” For instance, the following screen sets up a message mapping to assign new patients a different message, message number 2 (New Patient), if the appointment notes contain the words “NP” or “New Patient” or “New”.

![Edit Maps](image-url)
Messages can be mapped based on any of the following fields names:
The same type of mappings can be performed for any of the patient calling parameters: Language, Rotary Phone, Never Call, Never Leave Message on Answering Machine, and Volume Level.

Now you can see why HouseCalls is “Data Driven”. Anything that is present in your data files can be interpreted by HouseCalls to automatically deliver flexible, accurate messages.
Daily Routine

Calling Page Information

What steps are involved in bringing data from your scheduling software into HouseCalls?

Typically, our system installers set up every HouseCalls customer with a “Daily Routine”. In other words ... What steps are involved in bringing my current data into HouseCalls?

Though the steps may be different for each customer, they generally have similar steps. The first step is to print to file the reports that will be used by HouseCalls to make calls. These can be appointment reports, recall reports, no-show summaries, birthday listings, and more. Our installers will show you what steps to take when printing these reports, so that a data file will be created at the same time. Once you have generated these reports, HouseCalls will have the files that it needs to get started.

Simply double-click on the HouseCalls icon, and the system will automatically see that you have new files to import. You will be able to see your patients scrolling across the screen. When it has finished importing, HouseCalls will show your patients on the main calling page, then it will step you through reviewing the calling data, building a calling list, and setting up a calling schedule. It’s that simple!
Editing the Calling Page Information

After the data has been imported, you can review the calling information and change any entry. Simply highlight a patient from the calling page by clicking on the patient's name. If you click the right mouse button, you will see a shortcut menu that will let you change anything about the selected items.
This shortcut menu is especially helpful in changing information that involves multiple calling entries. In this way, you can manipulate multiple items easily. Here are some tips on selecting patients:

- Click with your left mouse button to select a single patient.
- Hold down the SHIFT key, and click with the left mouse button to select a range of patients.
- Hold down the CTRL key, and click with the left mouse button to select multiple patients that are spread throughout the calling page.

If you want to edit the information on a single patient, click the Edit button on the toolbar. This will bring up the Calling Page Information screen where you will be able to change the calling information for this particular patient.

Also, if manually adding a patient to the calling page, the Calling Page Information screen allows you to set the appointment information. The information changed on this screen takes effect for this calling page only.

To edit Patient Information, such as phone number or address, click the Patient Info button to go to the Patient Update Screen.
If you would like to record or play the Patient's name, choose **Record** or **Play** respectively. 

**Note:** This records the individual name recording, not the library of name recording.

### Calling Page Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient:</strong></td>
<td>7.00 - RJ Spreckelsen</td>
</tr>
<tr>
<td><strong>Calling Page:</strong></td>
<td>Friday, October 17, 2003</td>
</tr>
<tr>
<td><strong>Time:</strong></td>
<td>8:00 AM</td>
</tr>
<tr>
<td><strong>Special Date:</strong></td>
<td>/</td>
</tr>
<tr>
<td><strong>Language:</strong></td>
<td>English</td>
</tr>
<tr>
<td><strong>Doctor:</strong></td>
<td>Cindy Nelson</td>
</tr>
<tr>
<td><strong>Location:</strong></td>
<td>The Main Office</td>
</tr>
<tr>
<td><strong>Procedure:</strong></td>
<td>Routine Exam</td>
</tr>
<tr>
<td><strong>Message:</strong></td>
<td>Standard Appt</td>
</tr>
<tr>
<td><strong>Printed Phone:</strong></td>
<td>No Message</td>
</tr>
<tr>
<td><strong>Email Message:</strong></td>
<td>No Message</td>
</tr>
<tr>
<td><strong>Volume:</strong></td>
<td>2</td>
</tr>
</tbody>
</table>

**Notes:**

![Calling Page Information](image)

### Date

If you want to navigate to other calling page dates, you can select the “Date” icon from the main toolbar. In addition, the left arrow will take you to the previous day, the right arrow will take you to the next day, and the schedule book will bring you back to the current day.

![Date Navigation](image)

By clicking on the **Date** icon, you can select a specific calling page day to view.
Add a Patient

On occasion, you may want to manually add a calling entry or a patient into the system.

- To manually add a patient to the calling page, choose Add from the top icon bar; a search screen will appear.
- In the 'Search by' field, select what information you want to search for... Patient Name, Patient Number, Phone Number, or Reference Number.
- In the 'Find' box, type in the text you wish to search for and click Find.
A list of results will appear in the bottom window. If the patient you are searching for is not in the system, you may click the New button to go to the Patient Update Screen where you may manually add the patient to the HouseCalls system.

Highlight the patient you were searching for and click Select.

The Calling Page Information Screen will now appear where you may enter appointment information, such as the calling page date/time, the message which will be assigned, the doctor, location, procedure, and much more.
Delete A Patient from Calling Page

If you need to delete a patient from the calling page, highlight the patient and choose the Delete button. Or you may highlight the patient and press the DELETE key on your keyboard.

If you need to delete several patients from the calling page, here are some tips:

- Click with your left mouse button to select a single patient.
- Hold down the SHIFT key, and click with the left mouse button to select a range of patients.
- Hold down the CTRL key, and click with the left mouse button to select multiple patients that are spread throughout the calling page.

Exit

To Exit the HouseCalls program, choose the Exit button. This will close the HouseCalls application.
How to Build a Calling List in Wizard View

1. Before you build your calling list, you should first export your appointments from within your Practice Management System and import that list into HouseCalls. Once imported into HouseCalls, verify the patients to be called and the messages they are to receive.

2. If you need to manually add patients, click Add in the main toolbar. Type in the patient’s last name and select that person for your list.

3. When you have verified and/or added every patient that you want to include on your list, click Build List.

4. On the window that appears, select the calling page date range to extract the calls. These are the dates that your patients appear on the HouseCalls calling page. By default, Omit Answered Calls is checked. This tells HouseCalls to not call patients on the list that have already been contacted. Under normal circumstances, you want to leave this option checked during the build list process. Once your calling list dates are selected, click Next.

5. If you wish to use a Calling List Filter, select Yes, and choose your filter from the drop down menu. If you need to add a new filter, click Add Filter, or if you need...
6. To easily identify your calling list within the Schedule Manager, give your calling list a descriptive name. Once a name is entered, choose Next.
7. As you are building the calling list, HouseCalls may find some phone numbers that contain exchanges that have never been dialed before. If so, the following screen will appear, prompting you to decide how HouseCalls should dial the number. Selecting the first option enters the exchange in local exchanges and tells HouseCalls to dial this exchange as a local 7-digit number. Selecting the second option places the area code and exchange in local exchanges and tells HouseCalls to dial this exchange as a local 10-digit 'metro' number. Selecting the third option places the area code and exchange in long distance exchanges and tells HouseCalls to dial this number as a long distance number preceded by a '1'.

**How to Dial**

How would you like House Calls to dial this number for STEVE RUSSELL?

(251)555-1478

Dial as:

- 555-1478
- 251-555-1478
- 1-251-555-1478
8. Follow the on-screen prompts for correcting invalid phone numbers and recording each patient’s name. Remember, you will only need to record the names that you have not already recorded in a previous HouseCalls calling session. Even better, if you’re using the library of names, you will only need to record a name one time for all of your patients having the same name (i.e. the name Cindy can be recorded once and used for all of your patients having a first name of Cindy).

![Update Phone Number]

9. HouseCalls gives the user the option to leave “special messages” to one or more patients if desired. A special message is a one-time message that will be played to the selected patients at the end of their assigned message. To record a special message, click on the patients’ name. Once the name is highlighted, click record and record your message. If you would like to record the same message and assign it to more than one patient, you can hold down your CTRL key on your keyboard while clicking numerous patients. Once you are finished recording your special message or if you choose to bypass this feature, click Next.
10. In the final stage of building a calling list, you need to set the calling date and time. Select the date and time you want your calls to be made. Once changed, click Update to modify the date/time shown in the window. You may also choose multiple calling dates/times for this calling session. To do so, select your calling date and time, then click Add. If you place a checkmark in Set as Default Calling Time, HouseCalls will save the start time and ending time as the default for your next calling schedule. When you have added your calling date and time, click Finish.
11. The first screen that follows is a verification of the current system date and time. Since the accuracy of the system clock is critical in making calls at the correct time, HouseCalls lets you examine and change this information. If the system date and time are correct, click Yes. (Note: This screen will only appear once a day. If you build more than one list in a day, you will be asked to verify the date and time when you setup the first calling session only.)
Next, HouseCalls will check for a dial tone to make sure that the phone line is in place. If it does not detect a dial tone, it will display a message that will let you know to check the phone line connections.

Finally, the Schedule Manager will wait for the scheduled start time. Once the scheduled calling time is reached, the Schedule Manager will activate the TeleVox Line Monitor and begin making calls.

**Schedule Manager**

Once a Calling schedule has been created, it will be placed in the Schedule Manager. The Scheduler Manager holds all active calling schedules until they are complete and shows the current status of the calling session. Once the start time occurs for a calling schedule, the Schedule Manager automatically begins its calling session. If the user needs to create more calling schedules, they may do so by repeating the Build List Process.

Note: The Schedule Manager MUST be open at all times, when the calling session is active.
Refresh List: The Schedule Manager will automatically refresh its list every few seconds. You may select the Refresh List button to manually refresh the schedule list.

Edit Schedule: If you need to change the date or time of the calling session, you may highlight a calling schedule and choose Edit Schedule.

Pause Schedule: If you want to pause a current schedule's activity, highlight a calling schedule and choose Pause Schedule.

Resume Schedule: If you want to restart a paused schedule, highlight the calling schedule and choose Resume Schedule.

Delete Schedule: If you want to permanently delete a calling schedule, highlight the calling schedule and choose Delete Schedule.

Start Lines: If you need to start/restart lines that have been stopped, choose Start Lines.

Stop Lines: To stop the lines and stop all calling activity, choose Stop Lines.

Exit Manager: To exit the Schedule Manager, choose Exit Manager. Remember, the Schedule Manager must be open for calling sessions to be made.
Maintenance

Add/Modify/Delete Records

Add/Modify/Delete Patients

The patient update screen defines the unique characteristics of each patient. In other words, the information on this page defines what information HouseCalls will employ when making its call.

You may open the Patient Update Screen 2 different ways. The first way is by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Patients. The second way is from the Calling Page, you may double click the patient name.

Patient records are automatically created when you import your data file into HouseCalls. If you choose to manually add a new patient to the HouseCalls system, you may do so by choosing Add.

The Patient No field contains the patient number; this field is usually defined by imported data from the practice management system. If the Nick Name field contains a name, then this name will be used when HouseCalls makes the call; if it is empty, HouseCalls will use the name in the First Name field.

You can also record and play the patient's full name from this screen. If you are using the library of first names in your messages, then you do not want to record the patient name here, but instead within the Voice Manager.
Patient Calling Parameters

There are 5 patient calling parameters that you can define for each patient:

1. Rotary Phone: If you know that a patient has a rotary phone, then you can indicate this on the patient’s record in HouseCalls. When this is selected and the patient is called by HouseCalls, they will not hear the normal touch-tone response options. Instead, they will automatically have the option to record a message for the office, so that they will also be able to respond to the call. These patients will appear on the call results report as “Answered – Rotary Message.”

2. Never Call: If a patient does not want to receive a call from the HouseCalls system, you can mark the patient as "Never Call", and they will appear on the HouseCalls report as “Never Call.”

3. Never Leave Message on Answering Machine: This flag can be set in case a patient does not want HouseCalls to leave any messages on the answering machine. The status will appear as “Answering Machine – Message Not Played.”

4. Volume Level: This item tells HouseCalls the volume level it should play the message for a particular patient. You can adjust this value by sliding the bar. The higher the value, the louder the system will play. For a
demo on recording volume, choose Volume Demo within the Parameters Screen.

5. Language: The language flag can be used to indicate what language is primary for each patient. This, in turn, can be used during the importing process to automatically assign a different message to a patient based on the language that they prefer. You may add new languages through the Languages screen within the Maintenance drop-down menu.

**Add/Modify/Delete Doctors**

You may open the Doctors screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Doctors.

This screen defines information pertaining to each doctor that will potentially be merged in a call. Each doctor is assigned a number so that HouseCalls can place that doctor’s name in the message. The information in these fields will typically match the data imported from the practice management system.

The Voice field contains the voice that will be used to record the doctor’s name. You can click on Record or Play, and pick up the HouseCalls phone to perform voice operations. For example, if the doctor’s name is shown as “Dr. George Hall,” you can record “with Dr. Hall” so that it will flow smoothly in the message.

The Doctor’s Message function allows doctors to create a unique message to be placed in a message (“Hello, this is Dr. Hall. I am looking forward to seeing you soon.”) This function is optional; if it is used, the doctor must record his/her message so that the unique message will play in his/her voice. This feature can add a nice personal touch from each doctor, and patients enjoy receiving a message from their HealthCare provider.

In addition, the phone number and extension are used by HouseCalls if the patient chooses to speak with the receptionist. In this way, HouseCalls can transfer the call based on which doctor the patient will be seeing.
Add/Modify/Delete Locations

You may open the Locations screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Locations.

The Voice field contains the voice that will be used to record the Location name. You can record and play the different locations by selecting the appropriate voice, then clicking on the Record or Play buttons.

The text in the Description field does not have to match the recorded element itself. So, your text in the description field is only an identification for what has actually been recorded, and it will typically match the data that is in your imported file. For example, we can see here that the location shows “The Main Office”, but you can record “at our Main Office in Springfield” because that is how you will want it to be inserted into the message.

You may also record additional messages or Directions to this particular location by choosing the appropriate option and recording the message by choose the Record button and following the on screen prompts.
Add/Modify/Delete Procedures

You may open the Procedures screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Procedures.

The Voice field contains the voice that will be used to record the Procedure name. You can record and play the different Procedures by selecting the appropriate voice, then clicking on the Record or Play buttons.

The text in the Description field does not have to match the recorded element itself. So, your text in the description field is only an identification for what has actually been recorded, and it will typically match the data that is in your imported file. For example, we can see here that the procedure shows “Routine Exam”, but you can record “for a Routine Exam” because that is how you will want it to be inserted into the message.
Local Area Codes

In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

To enter the Local Area Codes, choose the Local Area Codes icon from the Calling Options Group (or choose Maintenance from the drop down menu, select Add/Modify Delete Records and choose Local Area Codes). This will open a window that will allow you to add, edit, or delete the local area codes in your area. To add a new local area code, select the Add button and type in your 3-digit local area code.
In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

Local Exchanges can best be defined as phone numbers that must be dialed as local numbers, either with or without the area code.

To enter Local Exchanges, choose the Local Exchanges icon from the Calling Options Group (or choose Maintenance, select Add/Modify Delete Records and choose Local Exchanges). This will open a window that will allow you to add, edit, or delete the local exchanges in your area. To add a new local exchange, select the Add button and type in your 3-digit or 6-digit local exchange.

3-digits vs. 6-digits
If you need numbers within a local area code to be dialed as 7-digit local numbers, you need to choose add and type in only the 3-digit exchange (the portion after the area code).

If you need numbers within a local area code to be dialed as 10-digit local numbers, you need to choose add and type in the 6 digit exchange ... area code + the 3 digit exchange.
If you are setting up 10-digit dialing (metro) for all numbers in an area code, you may simplify the process by running a program called metros6.exe located in the HouseCalls directory.

---

### Local Exchanges

**Local Exchanges**

All exchanges that could be local for your calling area should be added to this list.

**Here's how it works:**

If you would like HouseCalls to dial a number as a 7-digit local number, enter the first 3 digits that appear after the area code.

Ex: 633

If you want HouseCalls to dial a number as a 10-digit local number, enter the area code and the first 3 digits of the phone number.

Ex: 304633

---

### Long Distance Exchanges

In order for HouseCalls to dial phone numbers correctly, we must tell the system which numbers are to be dialed as local and which numbers to be dialed as long distance. To do this, you must enter in the Local Area Codes, Local Exchanges, and Long Distance Exchanges in your area.

Long Distance Exchanges can best be defined as phone numbers within your local area code that must be dialed as long distance... with a ‘1’ preceding the area code.

To enter Long Distance Exchanges, choose the Long Distance Exchanges icon from the Calling Options Group (or choose Maintenance, select Add/Modify Delete Records and choose Long Distance Exchanges). This will open a window that will allow you to add,
edit, or delete the long distance exchanges in your area. To add a new long distance exchange, select the Add button and type in the area code + the exchange (6 digits).

Languages

HouseCalls can support an unlimited number of languages. You may add languages to the HouseCalls system by choosing Maintenance from the drop-down menu, choosing Add/Modify/Delete Records, and then selecting Languages.

A language can be assigned to each patient in the Patient Update Screen, and a language can also be assigned to a voice in the Edit Voice screen within the Voice Manager.
Even more, HouseCalls will allow you to enter the scripts for days, months, numbers, and dates, so you can record the system elements using the syntax for each language. Here we can see some system elements scripts within the Voice Manager that have been entered for the months in Spanish.
Message Retrieval Access

Message Retrieval Access is used to identify who will be calling into the Message Retrieval System and which messages they should receive. You can define a unique PIN for different staff members, locations, or a combination of the two. You will find the Message Retrieval Access screen by choosing Maintenance from the drop-down menu, selecting Add/Modify/Delete Records, and choosing Message Retrieval Access.

The Access Entry number is simply a unique identification number for HouseCalls to utilize when collecting the messages for this entry. The Personal Identification Number (PIN) is the number that is actually entered when a staff member is calling in to the Message Retrieval System. The PIN can contain any numeric value, up to 10 digits. The description field should give information on who will be using the PIN to retrieve messages.

When calling into the HouseCalls system, the PIN is used in conjunction with the Access Code to allow entry into the system. The access code is initially assigned the default value (found on the Message Retrieval Parameters screen), and this can be changed at any time from this screen or by the staff member when calling into the system.
If you click on “Change Access Code,” a dialog box will appear, enabling you to enter a new access code. You must first enter the current access code, then follow with the new access code and a confirmation of the code. Next, Click on the “Save” button for your changes to be stored.

You can also clear the access code, and this will once again restore the default value back to the code. In addition, you may select Auto-Delete Outdated Messages and then specify the number of days for HouseCalls to automatically “clean up” any outdated messages that may be in the system.

FIFO and LIFO tell HouseCalls the order in which it should play the messages for this access entry. FIFO (First In, First Out) will play the messages oldest to newest, and LIFO (Last In, First Out) will play the messages newest to oldest.

If you check Only Include Specific Doctors, a button will be enabled which will allow you to specify the doctors that should be selected for the access entry. From the Specify Doctors screen, you can move the ‘Available Doctors’ into the ‘Selected Doctors’ list by clicking on the doctor’s name, then click on the “>” (move right) button or use the mouse to drag the doctor’s name on top of the ‘Selected Doctors’ list.
You can also utilize the CTRL button when clicking on doctor names to select multiple doctors that are scattered throughout the list, or you can use the SHIFT button to select multiple names that are within a range of doctors.

In the same way, you can remove selected doctors by putting their names back into the ‘Available Doctors’ list.

The “>>” (move all right) button indicates that you would like to move all of the doctors from the ‘Available Doctors’ list into the ‘Selected Doctors’ list, and the “<<” (move all left) button is used to remove all of the selected doctors from the list.

A similar screen will appear to select the specific locations that should be assigned to the access entry.
Parameters

Calling Parameters

To open the Parameters screen, choose Maintenance from the drop-down menu, then select Parameters (or select the Parameters icon from the Calling Options Group Menu). You will now be viewing the Calling Parameters screen.

The Parameters screen defines 'how' HouseCalls makes each call. You can customize HouseCalls with your preferences and bypass the default values. Below is a description of each field:

Identification Play Count after Answer: Defines the number of times HouseCalls will play the identification options before it plays the message.

Message Play Count after Answer: The number of times HouseCalls will play a message if it does not receive a touch-tone response.

Repeat Call after Busy Count: The number of times HouseCalls will recall a busy number before it moves on to the next phone number in the calling list. If HouseCalls does bypass a busy phone number, it will try the phone call again after the calling list is finished or in the time specified in "Minutes to Wait Before Retrying Call".

Time (seconds) between Busy Signal: The number of seconds HouseCalls will wait before it re-dial a busy phone number.

Maximum Busy Signals: Defines the number of Busy Signals, or Busy Tones, HouseCalls listens for, before determining if a phone number is busy.

Maximum Rings: The number of rings HouseCalls listens for before determining a phone call has not been answered. If HouseCalls determines a status of 'No Answer' HouseCalls will retry that number again in the time specified in "Minutes to Wait Before Retrying Call".

Play Amplification: How loud a message will play.

Record Amplification: Defines the volume at which you record names, greeting, and other message elements.

Max Times to Play on Answering Machine: How many times HouseCalls will leave a message on an answering machine.

Seconds to Wait Between Messages on AM: If HouseCalls is set to leave the message more than once on answering machines, this parameter defines the number of seconds between each message left on the machine.
Seconds to Wait Before Calling: Defines how many seconds HouseCalls will wait between making phone calls.

Minutes to Wait Before Retrying Call: The minimum amount of times that HouseCalls will wait before attempting to recall a patient that it could not reach at an earlier time because of no answer, a busy phone, etc. The number of times HouseCalls will retry different Call Statuses can be defined in Advanced Parameters.

Practice Name (for Patient Login Screen): Defines the default name on the "Patient Login Screen" and the default name to precede the names of Calling Schedules

Play Device: Determines the type of device used to play messages and message elements.

Record Device: Determines the type of device used to record messages and message elements.

Leave Message on Answering Machine: Determines whether HouseCalls will leave a message on an answering machine when a phone call is placed.

Preview Names Before Recording: Allows the user to preview non-recorded names during the build list process before recording.

Select Rotary for New Patients: Will automatically assign "Rotary Phone" to any new patients that are added into the HouseCalls system.

Allow Multiple Calls Per Patient: Determines if HouseCalls should make multiple phone call to the same household if the patients have the same phone number. For example, if two family members have appointments on the same day, HouseCalls can either make two separate phone calls, one to each family member, or it can restrict one of the numbers to give the appointment information for both patients in one message. If you decide to restrict multiple calls, you have the option of creating 'Family Messages' that combine all appointment information for multiple family members into one consolidated message. After a family message is created, you must setup Notification Messages.

Auto Delete Outdated Messages Over: This field lets the user specify the number of days before HouseCalls automatically deletes messages left by patients.

Use Default Recording if Missing: Allows the user to use default merge recordings if the message is missing a recording.

Restrict Calls: Determines how HouseCalls defines Multiple Calls Restricted (Family Message); either by phone number or an account number. The default setting is to restrict by 'Home Phone'.

Date Format: Determines how HouseCalls plays the date in a message. The default setting is to play the 'Ordinal'.

Notification Messages: Allows the user to setup 'Family Messages'. See detailed instructions on setting up Notification Messages.
Volume Demo: Allows the user to listen to the different volume level available with HouseCalls.

### Advanced Parameters

To open the Advanced Parameters screen, choose Maintenance from the drop-down menu, then select Parameters (or select the Parameters icon from the Calling Options Group Menu). Next, select the Advanced Parameters tab.

Advanced Parameters allow you to set your recall preferences based on the status of each call. For example, if the message was “Left on an Answering Machine,” should HouseCalls recall? Likewise if there was “No Answer,” should HouseCalls recall? Select Yes or No for each field; if you click the “#Retries” option, you must input how many times you want to recall.

- **Answered - Yes/No**: A person answered and pressed the touch tone key to indicate ‘Yes’ or ‘No’ as the response.
- **No Answer**: The last calling attempt had no answer.
**Left Message**: A person answered and pressed the touch tone key to leave a message.

**Ans Machine - Left Msg**: The message was delivered on an answering machine.

**Ans Machine - No Msg**: The message was not played on an answering machine.

**Hung Up**: A person answered but did not listen to the entire message.

**No Response**: A person answered and listened to the entire message but did not respond to the touch tone options.

**Busy**: The last calling attempt was busy.

**Out of Order**: A special information tone was received - call was attempted.

**No Touch Tone Req.**: The call was completed; no responses were required.

**Confirmed - No Response**: Identification confirmed and then listened to the entire message.

**Confirmed - Hung Up**: Identification confirmed and then did not listen to the entire message.

---

**Parameters**

<table>
<thead>
<tr>
<th>Calling Parameters</th>
<th>Advanced Parameters</th>
<th>Setup Options</th>
<th>Calling Methods</th>
<th>Print/Email/Fax Options</th>
<th>Dialing Options</th>
</tr>
</thead>
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### Advanced Parameters

<table>
<thead>
<tr>
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<th>Recall?</th>
<th>Build List Options:</th>
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<td>Status</td>
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<tr>
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<td></td>
<td>Bypass Special Messages</td>
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<td></td>
<td></td>
<td>Enable Calling Page Entry Locks for Active Schedules</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bypass Names Not Recorded</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Assign 'Not Recorded' Status</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spell (or Text-to-Speech) Patient Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use 'Member of Family' Element</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Answered - Yes/No</th>
<th>Yes</th>
<th>No</th>
<th>#Retries</th>
<th>Bypass Special Messages</th>
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</thead>
<tbody>
<tr>
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<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Enable Calling Page Entry Locks for Active Schedules</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Bypass Names Not Recorded</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Assign 'Not Recorded' Status</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Spell (or Text-to-Speech) Patient Name</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Use 'Member of Family' Element</td>
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<table>
<thead>
<tr>
<th>No Answer</th>
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<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Enable Calling Page Entry Locks for Active Schedules</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Bypass Names Not Recorded</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Assign 'Not Recorded' Status</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Spell (or Text-to-Speech) Patient Name</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Use 'Member of Family' Element</td>
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<table>
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<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Enable Calling Page Entry Locks for Active Schedules</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Bypass Names Not Recorded</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Assign 'Not Recorded' Status</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Spell (or Text-to-Speech) Patient Name</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Use 'Member of Family' Element</td>
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</table>

<table>
<thead>
<tr>
<th>Ans Machine - Left Msg</th>
<th>Yes</th>
<th>No</th>
<th>#Retries</th>
<th>Bypass Special Messages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ans Machine - No Msg</td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Enable Calling Page Entry Locks for Active Schedules</td>
</tr>
<tr>
<td>Hung Up</td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Bypass Names Not Recorded</td>
</tr>
<tr>
<td>No Response</td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Assign 'Not Recorded' Status</td>
</tr>
<tr>
<td>Busy</td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Spell (or Text-to-Speech) Patient Name</td>
</tr>
<tr>
<td>Out of Order</td>
<td>Yes</td>
<td>No</td>
<td>#Retries</td>
<td>Use 'Member of Family' Element</td>
</tr>
</tbody>
</table>

| No Touch Tone Req.    | Yes | No | #Retries | Bypass Special Messages |
| ID Confirmed - No Response | Yes | No | #Retries | Enable Calling Page Entry Locks for Active Schedules |
| ID Confirmed - Hung Up | Yes | No | #Retries | Bypass Names Not Recorded |

---
Bypass Special Messages: If selected, HouseCalls will not prompt you for adding special messages when you build the calling list.

Enable Calling Page Entry Locks for Active Schedules: If selected, this prevents calls which have already been built into one schedule to be built into other schedules.

Bypass Names Not Recorded: If selected, HouseCalls will not prompt you to record a name on your calling list that has not been previously recorded. It will “bypass” that name, and you can select if you would like to have HouseCalls assign the status as 'Name Not Recorded', spell the patient name, or play a generic ‘member of family’ element.

---

**Setup Options**

To open the Setup Options screen, choose Maintenance from the drop-down menu, then select Parameters (or select the Parameters icon from the Calling Options Group Menu). Next, select the Setup Options tab.

The Setup Options page determines the method in which HouseCalls records and plays voice files. These parameters determine values for silence and noise; they also define where silence begins or ends depending on the number of frames.

The “CP” fields deal with voice detection; the values in these fields reflect the quantifiable components (time, silence, noise) when placing a phone call to a patient. By editing any of these parameters, you will affect the sound quality and message delivery of each message.

**Trim Leading Silence**: During the recording process, HouseCalls will eliminate all silence in the beginning of your recording. This process is known as VoxMerge and is what produces a seamless message.

**Trim Trailing Silence**: During the recording process, HouseCalls will eliminate all silence at the end of your recording. This process is known as VoxMerge and is what produces a seamless message.

**Bypass Dial Tone Detection**: If selected, HouseCalls will not check for a dial tone during the build list process.

**Touch Tone Interruption**: If the touch tone interrupt is on, this function allows patients to respond to the message by pressing a touch tone before the message has finished playing.
Be careful! We recommend consulting our technical support staff before changing the parameters.

## Setup Options

The following parameters adjust the way HouseCalls will record and play voice files. These parameters should only be adjusted with the guidance from our technical support staff:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>NMS Voice Format</td>
<td>2</td>
</tr>
<tr>
<td>Silence Threshold</td>
<td>30</td>
</tr>
<tr>
<td>Threshold Frame Count</td>
<td>5</td>
</tr>
<tr>
<td>Average Frame Count</td>
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</tr>
<tr>
<td>CP Voice Long</td>
<td>200</td>
</tr>
<tr>
<td>CP Voice End</td>
<td>150</td>
</tr>
<tr>
<td>CP Noise Level (1-31)</td>
<td>8</td>
</tr>
<tr>
<td>CP Voice End - Ans Machines</td>
<td>400</td>
</tr>
<tr>
<td>Touch Tone Timeout</td>
<td>10</td>
</tr>
<tr>
<td>Touch Tone Interrupt</td>
<td>On</td>
</tr>
<tr>
<td>Max Record Time</td>
<td>120</td>
</tr>
<tr>
<td>Record No Voice Time</td>
<td>500</td>
</tr>
<tr>
<td>Record Silence Time</td>
<td>500</td>
</tr>
<tr>
<td>Dial Tone Noise Level</td>
<td>0</td>
</tr>
<tr>
<td>Record Noise Level</td>
<td>6</td>
</tr>
<tr>
<td>Text-to-Speech Rate</td>
<td>-1</td>
</tr>
<tr>
<td>Text-to-Speech Volume</td>
<td>100</td>
</tr>
<tr>
<td>Text-to-Speech Voice</td>
<td>Crystal</td>
</tr>
<tr>
<td>Trim Leading Silence</td>
<td>On</td>
</tr>
<tr>
<td>Trim Trailing Silence</td>
<td>On</td>
</tr>
<tr>
<td>Bypass Dial Tone Detection</td>
<td>Off</td>
</tr>
<tr>
<td>TTS Names</td>
<td></td>
</tr>
</tbody>
</table>

---

## Calling Methods

To open the Calling Methods screen, choose Maintenance from the drop-down menu, then select Parameters (or select the Parameters icon from the Calling Options Group Menu). Next, select the Calling Methods tab.

HouseCalls offers a variety of different methods to determining whether a phone call has reached a human or an answering machine. Choose the calling method that best suits your calling environment.
**Calling Method #1**

Calling Method #1 determines the difference between answering machines and people by measuring the amount of continuous noise and silence that is detected on the line after the call has been answered.

For example, if a person answers the phone, they will typically say “Hello”, followed by a period of silence. HouseCalls will detect this as a short voice followed by a long pause, and will determine that a person has answered. HouseCalls will then play the message for the patient.

If an answering machine picks up, HouseCalls will detect that a long voice is heard. For example, “Hi, you have reached the Smith Residence and we can’t come to the telephone at this time...”. Once the long voice is detected, HouseCalls will continue to listen, while the answering machine is playing the message, until a period of silence is reached. At that point, HouseCalls will play the patient’s message on the answering machine.

**Pros:**

- This is the default calling method. It is the easiest to setup and requires no extra recording.
- Parameters can be adjusted for the amount of silence time and the amount of long voice time that are evaluated during a call.

**Cons:**

- A person who answers the phone as “Smith Residence, Barbara speaking” may be detected as an answering machine.
- If the message of a patient’s answering machine plays “Hi” with a long pause, followed by “you have reached the Smith Residence and we can’t come to the phone...”. HouseCalls may detect this as a person, resulting in only part of the message being left after the ‘beep’ of the machine.
- Background noise, such as a loud television, may interfere with HouseCalls properly identifying people.
Calling Method #2

If Calling Method #2 is chosen, HouseCalls places the phone call and immediately upon hearing a voice, it plays a short message to indicate that an important message from the doctor will soon be played. After the short message is played, HouseCalls will make the determination whether it has reached a person or an answering machine.

For example, after a voice is detected on the line, HouseCalls will play “Please hold for an important message from Dr. Johnson”. Next, the noise level is measured to determine if HouseCalls has reached a person or an answering machine. If it detects silence, then HouseCalls determines that it has reached a person. If it detects noise, then HouseCalls assumes that it has reached an answering machine.

Pros:

- Provides for more accurate answering machine detection.
- Provides an immediate confirmation to the patient that a message from their doctor is about to be played.
Cons:

- Some patients may believe this to be a solicitation call and not listen to the message in its entirety.
- Background noise, such as a loud television, may interfere with HouseCalls properly identifying people.

**Calling Method #2 (Advanced)**

With Advanced Calling Method #2, HouseCalls will require a touch-tone response to determine that a person has answered.

For example, HouseCalls will place its call; upon hearing voice, it will immediately say, “Press 1 if this is a person and would like to hear an important message from Dr. Johnson”. If the person presses 1, HouseCalls recognizes the recipient as a person. However, if no key is pressed, HouseCalls determines that it has reached an answering machine.

**Pros:**

- Provides the most accurate answering machine detection of all three methods.

**Cons:**

- Requires the patient to press the 1 key prior to listening to the message.
- If a person answers the phone and does not press 1, HouseCalls will detect them as an answering machine.
Calling Method #3

With Calling Method #3, HouseCalls plays the message immediately upon hearing voice, and always detects the recipient as a person. Calling method #3 is not suggested for use with most systems as this method does not detect the difference between people and answering machines.

Calling Method #4

With Calling Method #4, HouseCalls ends call progress immediately after the call is answered. HouseCalls will then begin recording on the line, and will end the recording upon reaching a determined amount of silence (Total silence time for ending the recording for Method 4).

The total recording time will then be calculated, which will be used to distinguish if HouseCalls has reached a person or an answering machine.

Pros:

- Easy to setup and requires no extra recording.
• Parameters can be adjusted for the total amount of silence time and the total amount of recording time.

**Cons:**

• A person who answers the phone as “Smith Residence, Barbara speaking” may be detected as an answering machine.
• If the message of a patient’s answering machine plays “Hi” with a long pause, followed by “you have reached the Smith Residence and we can’t come to the phone…”, HouseCalls may detect this as a person, resulting in only part of the message being left after the ‘beep’ of the machine.
• Background noise, such as a loud television, may interfere with HouseCalls properly identifying people.

### Speech Recognition

HouseCalls Version 7.5 has the capability to use speech recognition to accurately detect between answering machines and humans … as well as identifying operator messages for busy phones, out of order messages, and solicitation blocks.
Pros:

- Accurate detection.
- Ability to add/edit/delete words and phrases to adjust detection.

Cons:

- Due to the additional time required to analyze the recorded file and determine what words and phrases were said, some systems may experience a delay before the message begins.
- Requires a higher speed processor and higher amounts of RAM compared to other calling methods to quickly analyze the recorded wav files.
Print\ Email\ Fax Options

To open the Print\ Email\ Fax Options screen, choose Maintenance from the drop-down menu, then select Parameters (or select the Parameters icon from the Calling Options Group Menu). Next, select the Print\ Email\ Fax Options tab.

Print Options

**Auto Print Report**: Automatically prints calling report after the calling session. The report can print either combined, by doctor, or by location. You also have options here to print the report by time, exclude messages that are not assigned, include the doctor names (rather than doctor numbers), and include the location names (rather than location numbers).

**Sort by Name Under Status**: When the report is printed, the report is sorted alphabetically by name under each status.

**Print Report by Time**: If selected, the report will include the appointment time.

**Exclude Msg Not Assigned**: If selected, the report will not include patients that did not have a message assigned.

Email Options

**Preferred Time to Send Email Messages**

- Immediately before calling patients
- After the calling program has finished running
- Connect to the Internet before sending the Call Results Report

**Internet Connection Properties**

Fax Options

**Faxing Method**

- Individual Pages
- Entire Document
- Extended Faxing

**Fax Delay**: 0

**Number of Retries for Fax Transmission Not Complete**: 1
Include Doctor Names: If selected, the report will include Doctor Names.

Include Location Names: If selected, the report will include Locations.

Record Detailed Calling History: If selected, HouseCalls will store a detailed history of each call, including number of times called and each response.

Email Options

Preferred Time to Send Email Messages: You may choose to send email message immediately before calling patients or immediately after calling patients.

Connect to the Internet Before Emailing the Call Results Report: Choose this option if using a dial-up modem internet connection and you are required to connect to the internet prior to sending an email.

Mail Server: Type in the name of the mail server being used

Note: In order to setup Email messages, you must enter an Email From name and a valid Email Address in the Doctor Update Screen for Dr. #0.

Fax Options

Faxing Method: You have the option to send the entire document at once or you can send one page at a time. Extended faxing will produce an attractive, graphical call results report that can be sent to most fax machines.

Number of Retries for Fax Transmission Not complete: The number of times HouseCalls will try to re-fax if the fax transmission did not complete. This function is only applicable to those who choose to automatically fax after the calling session.

Dialing Options

To open the Dialing Options screen, choose Maintenance from the drop-down menu, then select Parameters (or select the Parameters icon from the Calling Options Group Menu). Next, select the Dialing Options tab.
### Local Dialing Prefix:
If the phone system requires a digit (or group of digits) to be dialed before local phone numbers, such as a '9', you may enter it in this field. Specify Codes allows you to set local dialing prefix to only certain exchanges.

### Long Distance Access Code:
If the phone system requires a digit (or group of digits) to be dialed before long distance phone numbers, such as a '9', you may enter it in this field. Specify Codes allows you to set long distance dialing prefixes to only certain area codes.

### Long Distance Suffix:
If the phone system required a digit (or group of digits) to be dialed after long distance numbers, you may enter it in this field.

### Method for Transferring to the Receptionist:
This defines where HouseCalls sends patients who want to speak with a receptionist. HouseCalls can ring the local HouseCalls PC, perform three-way calling, or dial an extension. The extension or number dialed can be linked to the doctor that the patient will be seeing.

### Use International Phone Numbers:
If this box is checked, HouseCalls will use the phone number in the International Phone field in the Patient Update Screen.

### Bypass Dialing 1 for Long Distance:
If selected, HouseCalls will not dialing 1 preceding the area code when making long distance phone calls.

### Bypass Invalid Phone Numbers:
If selected, HouseCalls will automatically bypass all invalid phone numbers without alerting you to correct it.
Bypass Exchanges Not on File: If selected, HouseCalls will not prompt you to specify how to dial phone exchanges which have not been entered into the HouseCalls system. You have the option to either assign a status of 'Not on File' or dial those numbers as Long Distance.

Message Retrieval Parameters

Message Retrieval Parameters can be accessed from the Maintenance drop-down menu by selecting Message Retrieval Parameters. These parameters affect how the Message Retrieval System operates, and they control how the program can be automatically scheduled to run on a day-to-day basis.

The Max Attempts for Entering PIN and Max Attempts for Entering Access Code fields define the maximum number of times that a staff member can attempt to input their PIN or
Access Code before the system will reach the maximum number of retries and disconnect.

The Max Times to Repeat Menu Options tells the Message Retrieval program how many times it should repeat the menu options when it is detecting that there is no response from the caller. If it hits the maximum number of times to repeat the menu options, it will assume that the caller is not responding, and the system will disconnect the call.

The Number of Rings Before Answering determines how many rings should occur before the line is picked up by the Message Retrieval System.

The Max Seconds to Automatically Stop the Message Manager Before Calling field defines the amount of time, in seconds, that HouseCalls should wait before determining that it cannot automatically close the Message Manager before calling. This parameter is only utilized if the Message Retrieval Program is active when HouseCalls is ready to start making calls.

The Message Retrieval Program also has its own play amplification. You can adjust the volume level that the prompts are played by clicking down on the bar and sliding it left or right with your mouse.

The “Default Access Code” tells HouseCalls what value to assign to the access code field when a new access entry is added, or when the access code is cleared. This field can be blank, or it can be numeric up to 10 digits.

There are also fields that enable you to automatically schedule the Message Retrieval Program to run after making calls. You simply check the days that HouseCalls will be making calls, then select the day and time that HouseCalls should stop the Message Retrieval program. For example, if you are calling on Monday night, HouseCalls will activate the Message Retrieval program after calling, and it will keep the program active until the following Tuesday at 2:00 PM.

Finally, you can select the voice that will be used for the prompts in the Message Retrieval Program.

**Message Retrieval Activation**

Message Retrieval Activation is a way to manually start the Message Retrieval Program so that staff members can call in to the system to retrieve their messages. You can find this screen by choosing Program from the drop-down menu and selecting Activate Call-In Utility to Retrieve Messages.

From this screen, you can tell HouseCalls when it should stop accepting calls for this session. The arrow keys can be used to assist you in adjusting the date or time fields. Next, click on the Activate Call-In button.
The Line Monitor will open and HouseCalls will be minimized to the task-bar. If you wish, you can minimize the Line Monitor, and continue to work in HouseCalls or other programs as usual.

As staff members call in to pick up their messages, you will notice that the line activity is updated within the Line Monitor. In addition, if you need to close the Message Retrieval System before the stop time is reached, you can click on the Stop Lines button to shutdown the line.

### Calling Page Configuration

You may arrange the columns on the calling page by choosing Maintenance from the drop-down menu and selecting Calling Page Configuration.

From within the Calling Page Configuration screen, drag-and-drop the items into any order you wish. Once complete, click Save.
Also, from the Calling Page Configuration screen, you can set the opening and closing times for your office. In some cases, this will tell HouseCalls if an appointment time is AM or PM.

### Screen Labels

You may opt to change your primary identification tags within HouseCalls. For example, if you are implementing HouseCalls in an insurance setting, you may want to change “Patient” to “Claimant” and “Doctor” to “Adjuster.”

To change the screen labels, choose Maintenance from the drop-down menu and select HouseCalls Screen Labels. From within the Label Configuration screen, choose a new label for client, provider, location, or reason by double clicking the name you wish to use. Then, from the Label Choice screen, choose Select to use the new label name.
If you wish to add a new name, double click Add under the appropriate area and enter a new label name.

By updating the label configuration, you will notice that every screen, report, and menu item now has the new label name attached as it relates to the client, provider, location, and reason.

Once you change the settings, you must restart HouseCalls for the changes to take effect.
Backup and Restore

Backup

It is highly recommended you backup your HouseCalls system to a network drive, floppy diskettes, or a zip drive on a regular basis. In case of a computer failure or hard drive failure, a backup of your HouseCalls system will be very beneficial.

To create a backup of the HouseCalls system, choose Maintenance from the drop-down menu and select Backup. Within the Backup screen, select the items you wish to backup, enter a name for your backup, select the drive you want to backup to, and enter a description of the backup. After you have entered the information, click Backup to begin the backup process.

Once complete, 4 files will be created at the location you specified: 'HC101703.zip' (the label name you entered), 'label.mem', 'memvars.mem', and 'summary.txt'.

The items included in the Backup are:

- Schedule: The calling pages
- Name Recordings: The doctor name recordings and the patient name recordings
- Patient File: The patient records
• Message Scripts: The scripts created in voice manager and message builder
• Voice Message Files: The recordings created in voice manager and message builder
• Bridge Files: The bridge records

**Restore**

If you need to restore a backup of the HouseCalls system, choose Maintenance from the drop-down menu, then choose Restore. Within the Restore screen, select the items you wish to restore and the source drive location of the backup. After you have entered the information, click Restore to begin the restore process.

Note: Restoring a backup will overwrite all current data in the HouseCalls system.
Import

Bridge

In its simplest form, a bridge is a feature that filters/converts certain information from your Practice Management System (PMS) and places it in HouseCalls. Bridges allow HouseCalls to gather data from an outside source; in this sense, the bridge connects HouseCalls and the outside data source (in your Practice Management System) to more easily filter, store, and send information.

These bridges operate in a format resembling Boolean Conditionals. To gain access to your bridges, choose Import under the Maintenance drop-down menu, then at the next screen, choose Setup.

![Bridge Setup Screen]

Bridge Setup

The bridge setup screen lets you access any bridge and the file it is associated with. Here, you can scroll through your bridges and modify the parameters of each.

In the Bridge field, you must enter a specific name for this bridge. All data files are different; therefore, all bridge records/ names will treat the data files differently during the converting process.

In the Data File field, you must enter the location and name of the data file that your Practice Management System creates.
Any bridge that is using the Auto Import function must use the Delete File command. You can manually import/convert a data file by choosing Convert; however, you usually want the system to automatically import your data file each time you open HouseCalls, so be sure you have a checkmark in Auto Import.

The Bridge Priority box assigns bridge priority to certain files that have more than one bridge assigned to them.

The Convert, View, and Locate buttons are associated with the data file. You can convert, view, or locate a file by using these functions. You can also locate a bridge using the Locate button. The Assign button lets you assign bridges to message types.

**Bridge Layout**

The bridge layout screen contains the pertinent information from the data file that is used when HouseCalls builds messages. The format of each field corresponds to that of the converted data file.

If the data file is a Printer file, the column (Col) and length (Len) define where in the data file these items are located. If the file is comma delimited (comma separated), you can specify the order where HouseCalls can locate each field.
To "measure" the column and length, choose the Format button to view the converted file, but only after you have chosen Convert. To "count" the field locations in a comma separated file, choose View File to view the original data file. In short, View File allows you to view the original data file, while Format allows you to view the converted data file.

The Format column specifies the way certain information is displayed in the data file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Format</th>
<th>Col</th>
<th>Len</th>
<th>Order</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>MM/DD/YY</td>
<td>113</td>
<td>8</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>99-99</td>
<td>40</td>
<td>5</td>
<td>0</td>
<td>Nick Name</td>
</tr>
<tr>
<td>Patient No</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>International Phone</td>
</tr>
<tr>
<td>Patient Name</td>
<td>Unique Last, First</td>
<td>19</td>
<td>15</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td>9999999999</td>
<td>175</td>
<td>10</td>
<td>0</td>
<td>Duration</td>
</tr>
<tr>
<td>Doctor</td>
<td>Rating</td>
<td>150</td>
<td>25</td>
<td>0</td>
<td>Optional Fields</td>
</tr>
<tr>
<td>Column</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Message Maps</td>
</tr>
<tr>
<td>Location</td>
<td>Numeric</td>
<td>144</td>
<td>5</td>
<td>0</td>
<td>Rotary Maps</td>
</tr>
<tr>
<td>Procedure</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Language Maps</td>
</tr>
<tr>
<td>Message</td>
<td>Mapped</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Never Call Maps</td>
</tr>
<tr>
<td>Misc #1</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Volume Maps</td>
</tr>
<tr>
<td>Misc #2</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>New Anc Mach Maps</td>
</tr>
<tr>
<td>Language</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Volume</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Rotary</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Never Call</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>New Anc Mach</td>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Spec Purpose Date</td>
<td>MM/DD/YY</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

**Advanced Bridge Settings**

The pertinent information associated with the Advanced function is the Automatically Add New Doctors, Locations, and Procedures check-boxes. By checking these boxes, you set HouseCalls to automatically add these elements from the PMS data file, eliminating the need for you to manually add this information into the HouseCalls system. When HouseCalls finds new Doctors, Locations, or Procedures, during the import process, it will automatically add them to the system and prompt you to record the elements.

Another important item on this screen is the feature When Area Code is Not Present, Insert: field. This will allow HouseCalls to fill in the area code with a value if it is missing during the importing process.

Auto-Insert Calling Page Date tells HouseCalls that if the date is not present in the data file, automatically import the data to a specific day.
Auto-Insert Purge Dates tells HouseCalls to automatically clear the HouseCalls calling pages for specified days. If using this option, you must also select Purge Calling Page on the bridge name screen.

Message Mapping

By using message mapping, you define a list of conditions for the item specified. For example, you may want to give all New Patients a different message which includes directions to your office.

Other types of mappings, such as a Language Map, tell HouseCalls to deliver messages in a certain language. Likewise, you can create Never Call Maps which would flag certain patients as Never Call and prevent those patients from receiving a phone call from the HouseCalls system.

To implement message mapping, select Message Maps from the Page Layout screen. If this button is disabled (grayed-out), then you must choose the drop-down arrow next to Message and changed its value to Mapped. You will see a list of the current message mappings that have been added:
When HouseCalls imports the calling data, it checks the mapping conditions before assigning a message to each patient. In this way, HouseCalls can assign a different message based on the data in your import file. In addition, you can map messages based on multiple fields by joining the conditions with the words “AND” or “OR.” For instance, the following screen sets up a message mapping to assign new patients a different message, message number 2 (New Patient), if the appointment notes contain the words “NP” or “New Patient” or “New”.
Messages can be mapped based on any of the following fields names:
The same type of mappings can be performed for any of the patient calling parameters: Language, Rotary Phone, Never Call, Never Leave Message on Answering Machine, and Volume Level.

Now you can see why HouseCalls is “Data Driven”. Anything that is present in your data files can be interpreted by HouseCalls to automatically deliver flexible, accurate messages.
Reports

Call Results Reporting

Call Result Reporting

The Reports function gives you a detailed report of calling activity and can give you a report of calling activity based on doctor, location or both (combined).

To access reports, click the Reports button from the Main Group Menu, or choose Reports drop-down menu, then Call Results Reporting | Call Results Wizard.

You may select from two types of reports. A Report by Call List allows you to choose an existing calling schedule and print the results. A Report by Date Range, allows you to print the results for a given date range. After you have selected your report type, click Next.

1) Report by Call List

From the drop-down menu, choose the schedule name from the list. After choosing the call list, click Next.
You may choose to include only specific doctors, locations, or messages on the report by placing a checkmark in the appropriate box, and selecting the item from the drop-down menu. Once you have chosen your report format, click Next.
If you choose to print a Combined Report, the results will be sorted by calling statuses only. If sorting By Doctor or By Location, the report will group those items together, then sort by calling statuses.

To view the report, choose Screen Output. If you want to print the report without viewing it, select Printer Output.

After choosing your sort order and destination for the report, choose Finish to generate your call results report.

2) **Report by Date Range**

Select the range of dates to include on the report. After choosing the start date and end date, click Next.
You may choose to include only specific doctors, locations, or messages on the report by placing a checkmark in the appropriate box, and selecting the item from the drop-down menu. Once you have chosen your report format, click Next.
If you choose to print a Combined Report, the results will be sorted by calling statuses only. If sorting By Doctor or By Location, the report will group those items together, then sort by calling statuses.

To view the report, choose Screen Output. If you want to print the report without viewing it, select Printer Output.

After choosing your sort order and destination for the report, choose Finish to generate your call results report.

If viewing the report, you can print the report by clicking on the small printer on the right side of the Print Preview window. To close the summary table, click the close door on the right side of the Print Preview window.
Call Results Graphics

You can also access graphs for your call reports in the form of a bar graph or pie chart. To utilize this function, choose Call Results Graphics from the Reports drop-down menu. Then, select the type of graph that you would like your report to be generated on.
Here, you can select what type of graph or chart that you would like to view. If you choose to graph monthly comparisons, you can see how the call results compare over a number of months.

The following are examples of a Call Results Summary Bar Graph and a Call Results Summary Pie Chart:
Call Statuses

HouseCalls is capable of detecting the following call statuses:

- Answered – Called for Receptionist
- Answered – Hung Up
- Answered – No
- Answered – No Response
- Answered – No Touch Tones Requested
- Answered – Left Message
- Answered – Repeated Message
- Answered – Rotary Message
- Answered – Yes
- Answering Machine
- Answering Machine – Message Not Played
- Called – No Answer
- Dial Tone Not Detected
- Invalid Phone Number
- Message Not Assigned
- Multiple Calls Restricted
- Name Not Recorded
- Never Call
- Not Called
- Out of Order
- Phone Too Busy

If you are confirming the identity of the patient before playing the message, the following status codes can also be generated:

- Answered – Confirmed Called for Receptionist
- Answered – Confirmed Hung Up
- Answered – Confirmed Left Message
- Answered – Confirmed No
- Answered – Confirmed No Response
- Answered – Confirmed No Touch Tones Requested
- Answered – Confirmed Repeated Message
- Answered – Confirmed Yes
Email Schedule

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule. To setup the Call Results Report to be emailed, you must first setup an Email Schedule.

Setting up a Call Results Email Schedule

- Choose Reports from the pull down menu
- Choose Call Results Email Schedule
- You will now be prompted to enter in the necessary information to successfully Email the Call Results Report.
- To add a new Email Schedule, choose Add, and type in a Description in the appropriate field.
- Next, type in a valid email address in the To: field (whom the report is sent to) and a valid email address in the From: field (whom the report is from).
- Next, choose how you want the report to be sorted: combined, by doctor, by location, by location & doctor, by doctor & procedure, export file, or summary page.
- You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.
- Finally, setup the days you want the report to be emailed. By placing a check mark in the appropriate day of the week, you are enabling the report to be emailed immediately following a HouseCalls Calling Session.
Fax Schedule

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule. To setup the Call Results Report to be faxed, you must first setup a Fax Schedule.

Setting up a Call Results Fax Schedule

- Choose Reports from the pull down menu
- Choose Call Results Fax Schedule
- You will now be prompted to enter in the necessary information to successfully Fax the Call Results Report.
- To add a new Fax Schedule, choose Add, and type in a Description in the appropriate field.
- Next, type in a valid fax/ phone number, including any dialing prefixes or suffixes.
Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

You may also choose to have the report Include Only Specific Doctors, Location, or Messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.

If desired, you may include a cover sheet with the Call Results Report. Simply, place a check mark in the Include Cover Sheet check-box and type in the information you want to appear on your Cover Page.

Finally, setup the days you want the report to be faxed. By placing a check mark in the appropriate day of the week, you are enabling the Report to be faxed immediately following a HouseCalls Calling Session.

Print Schedule

HouseCalls allows the user to Email, Fax, and Print the Call Results Report on a daily schedule.
There are two ways to setup the Call Results Report to print automatically.

- **Auto-Print**

  Auto-Print is an easy way to set HouseCalls to print the Call Results Report after each Calling Session. See directions on setting up auto-printing in either Classic View or Wizard View.

- **Print Schedule**

  Setting up a Printing Schedule is for the advanced HouseCalls user who needs to specify what days to print the report and also to designate what printer the report is to be printed to. To see directions on setting up a print schedule, continue reading through the following directions.

**Setting up Auto-Printing** (for the novice user)

**Classic View**
- Choose **Maintenance** from the pull down menu
- Choose **Parameters**
- Click the **Advanced** button
- On the Advanced Calling Parameter screen, place a check mark in **Auto-Print Report**. Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

**Wizard View**
- Choose **Maintenance** from the pull down menu
- Choose **Parameters**
- Choose the **Print/ Email/ Fax Options** tab
- Under the **Call Result Report** section, place a check mark in **Auto-Print Report**. Next, choose how you want the report to be sorted: combined, by doctor, by location, or by location & doctor.

**Setting up a Call Results Print Schedule** (for the advanced user)

- Choose **Reports** from the pull down menu
- Choose **Call Results Print Schedule**
- You will now be prompted to enter in the necessary information to successfully Print the Call Results Report.
- To add a new Print Schedule, Choose **Add**, and type in a **Description** in the appropriate field.
- Next, click the **Select** button and choose the printer you want HouseCalls to print to from the drop down menu. When the correct printer is selected, choose **OK**.
• Next, choose how you want the report to be sorted: combined, by doctor, or by location.
• You may also choose to have the report include only specific doctors, location, or messages. To filter the report, place a check mark in the appropriate box and click the Specify button to include only the desired information.
• Finally, setup the days you want the report to be printed. By placing a check mark in the appropriate Day of the Week, you are enabling the report to be printed immediately following a HouseCalls calling session.

Additional HouseCalls Reports

Additional HouseCalls Reports

There are many types of reports you can print within the HouseCalls program. To access the various types of reports, choose Reports from the drop-down menu.
Below are a list of some of the more common type of reports you may choose to generate within HouseCalls.

**Calling Page Entries**

This option gives you a report for a specific calling page day. This reports details the patient name, type of appointment, time of appointment, phone number and status of the call.

You are allowed to sort this list alphabetically (patient) or by the time of the daily appointments (time).

<table>
<thead>
<tr>
<th>Time</th>
<th>Name/Notes</th>
<th>Number</th>
<th>Phone Number</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00A</td>
<td>RUSSELL, STEVE</td>
<td>17144.00</td>
<td>(251)555-1478</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>8:00A</td>
<td>WILLIAMS, SHARON</td>
<td>17163.00</td>
<td>(251)555-1470</td>
<td>Answered - No</td>
</tr>
<tr>
<td>8:30A</td>
<td>MCKOY, MERLE</td>
<td>17145.00</td>
<td>(251)555-8783</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>8:30A</td>
<td>GLOVER, MICHAEL</td>
<td>17164.00</td>
<td>(251)555-9030</td>
<td>Answered - No</td>
</tr>
<tr>
<td>9:00A</td>
<td>SPAIN, CAROL</td>
<td>17146.00</td>
<td>(251)555-3717</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>9:00A</td>
<td>CUEVAS, ROBERTO</td>
<td>17165.00</td>
<td>(251)555-8115</td>
<td>Answered - No</td>
</tr>
<tr>
<td>9:30A</td>
<td>MOISLEY, RYAN</td>
<td>17166.00</td>
<td>(251)555-1956</td>
<td>Answered - Left Message</td>
</tr>
<tr>
<td>9:30A</td>
<td>STEWART, ROBERTA</td>
<td>17147.00</td>
<td>(251)555-2991</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>10:00A</td>
<td>AUMAN, DARY</td>
<td>17167.00</td>
<td>(251)555-8863</td>
<td>Answered - Left Message</td>
</tr>
<tr>
<td>10:00A</td>
<td>THAMES, SHERRY</td>
<td>17148.00</td>
<td>(251)555-2825</td>
<td>Answered - Yes</td>
</tr>
<tr>
<td>10:30A</td>
<td>LEON, ERIN</td>
<td>17168.00</td>
<td>(251)555-0879</td>
<td>Phone Too Busy</td>
</tr>
</tbody>
</table>
### Patient Listing

This feature gives a master list of all patients in the HouseCalls database. You can sort this list either by patient name (alphabetical) or patient number (numerical).

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Phone</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>17156.00</td>
<td>HARDISON, SANDRA</td>
<td>(251)555-5475</td>
<td>Home</td>
</tr>
<tr>
<td>17157.00</td>
<td>BAKER, MARTHA</td>
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<td>CUEVAS, ROBERTO</td>
<td>(251)555-8115</td>
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System Details

Positioned under the Reports drop-down menu, System Details allows you to access reports for several components of HouseCalls. You can obtain the following information in report form simply by choosing the detail you want to view or print. Below is an example of a print out of Current Messages.

```
Print Preview

HouseCalls™ Messages

Message Elements:
- Greeting #2
- First Name
- Subject #1
- Doctor's Name
- ON
- Date
- SCHED_FOR
- Time
- Ending #1
- 1 Key Instruction #1
- 2 Key Instruction #1
- 3 Key Instruction #1
- 1 Key Ending #1

Current Message:
Good evening, this is Rachel Armstrong from the Medical Center. I am calling with a quick reminder for (Patient's First Name Merge) that you have an appointment with (Doctor Merge) on (Date Merge) SCHED_FOR (Time Merge). We are looking forward to seeing you then.

Please press the 1 key on your touch tone telephone if you can confirm your appointment at this time.

Press the 2 key if you would like to replay this message.

Press the 3 key if you would like to leave us a message. You may start recording after the tone, and you may hang up when your message is complete.

Thank you for confirming your appointment. We look forward to seeing you soon.
```
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