



# Version 9 Manual

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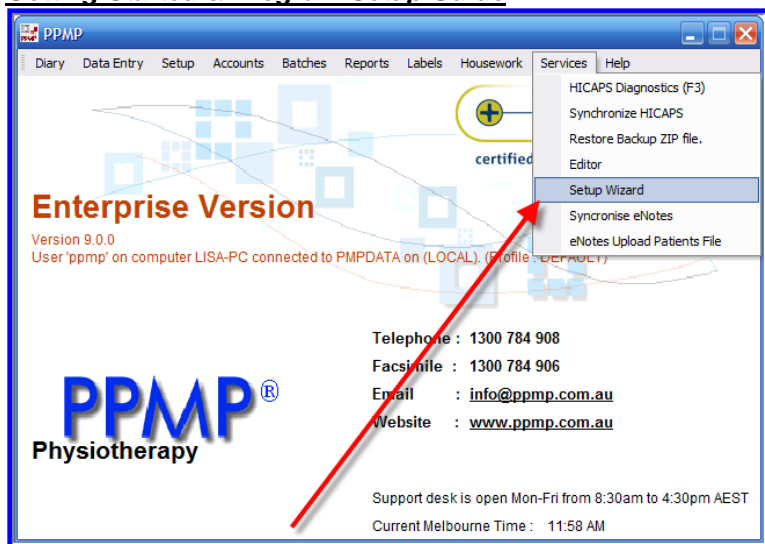
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## Section 1 – New user setup guide

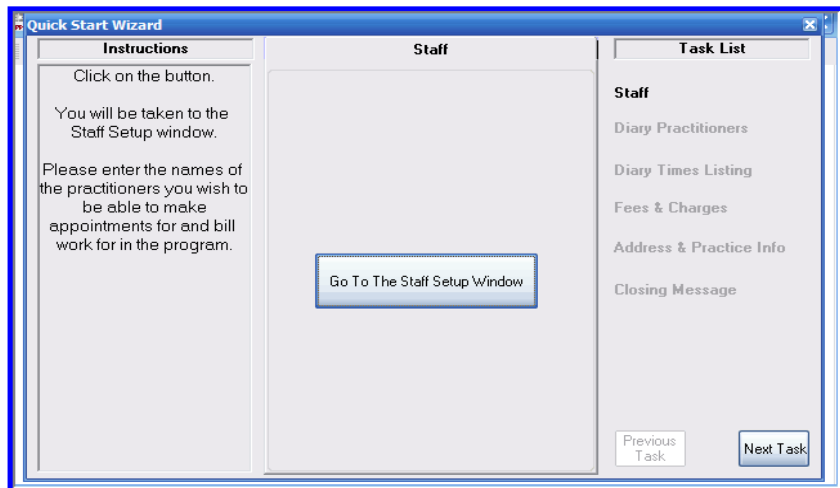
### Program Setup Wizard

Click [HERE](#) to watch video

### Getting Started & Program Setup Guide



- On the Main PPMP® Screen click on Services
- Select Setup Wizard



- The above window appears
- Click on Go to the Staff Setup window



- Click Add New

Details | **Provider Nos** | Appointment Types | 1st Available

Staff No.  ☒ Currently employed Save

Name

Name to show on accounts

Name to show on the diary

**Login Details :**

Login

Password

User Security Level

**Charge Types Used (optional) :**

For treatments

For Other Charges  Clear Charge Type Selections

- Enter their FULL NAME & and the name you want to show on the diary

Save

- Click Save (save the changes)
- Click Yes

Details | **Provider Nos** | Appointment Types | 1st Available | **Tyro Payments**

Treatment Location  Save Provider No Details

Payment Method  Save Provider No Details To All Payment Methods

Provider No :

**Hicaps**

Provider Group Type  View Hicaps Item Number List

Service Type Code

**Tyro**

Service Type Code

**Medicare Online :**

Claim Type :

Claim Service Type :

Address

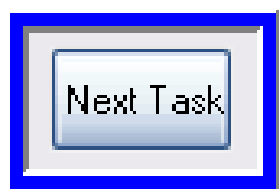
- Click Provider Nos Tab
- Enter Provider Numbers

Save Provider No Details To All Payment Methods

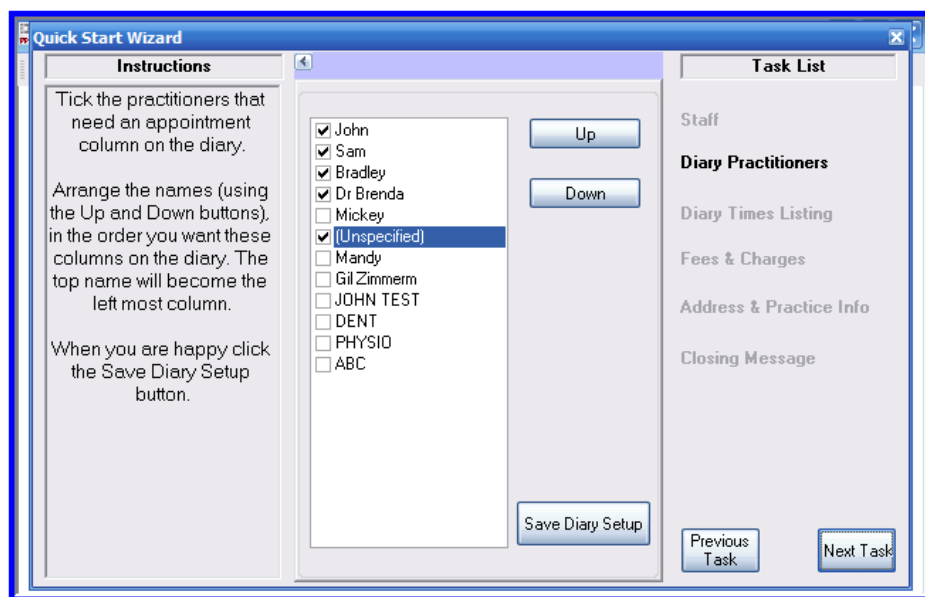
- Click Save Provider No Details to All Payment Methods

Exit

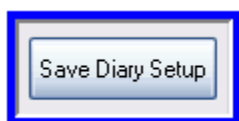
- Click exit



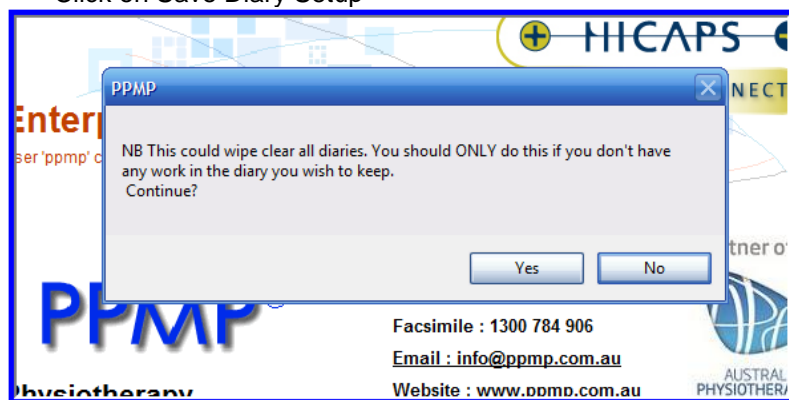
- Click on Next Task



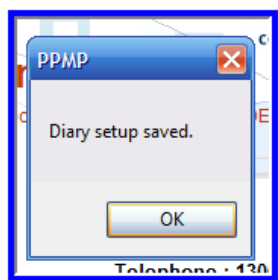
- Select the Practitioners you want displayed on the diary
- Using the Up/Down buttons put them in the order you want them to appear on the diary.
- When you have the columns in the order you want



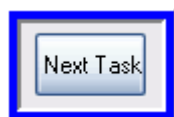
- Click on Save Diary Setup



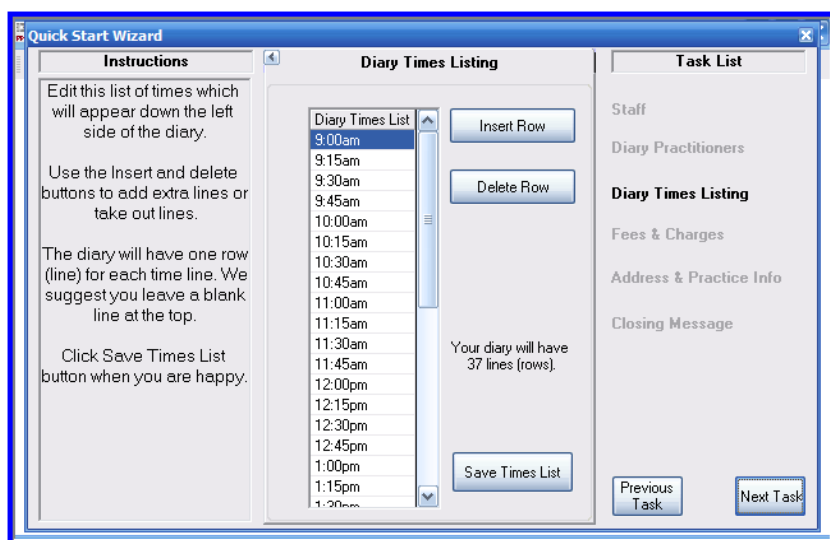
- Click Yes



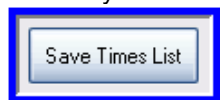
- Click OK



- Click Next Task.



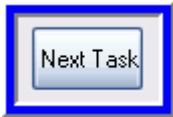
- Diary Times List – using the insert or delete buttons - setup your diary times



- Click Save Times List.



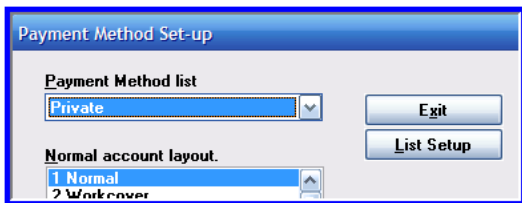
- Click OK



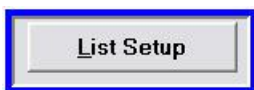
- Click Next Task



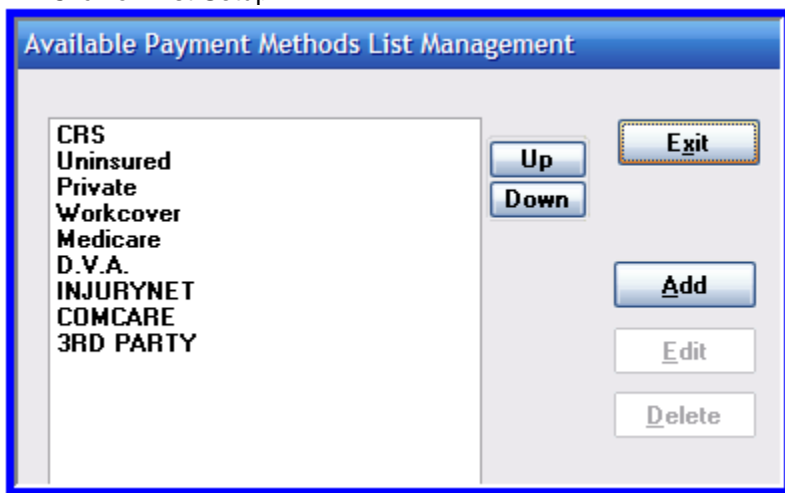
- Click Go to the Fees & Charges Setup Window



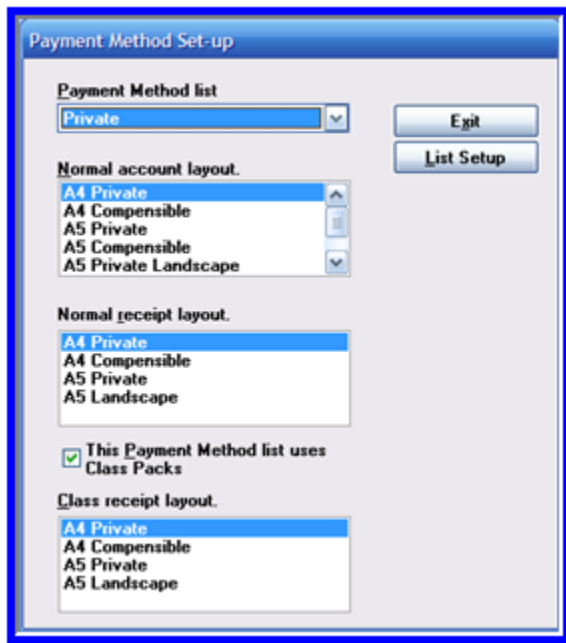
- Click on the set up button for Payment Methods



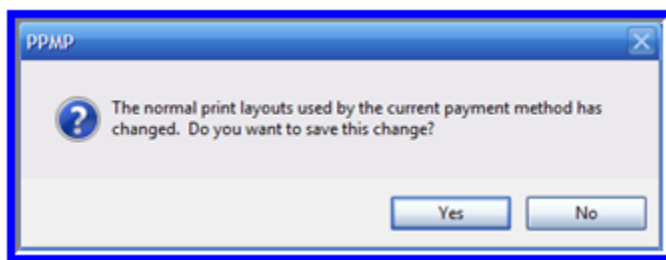
- Click on List Setup



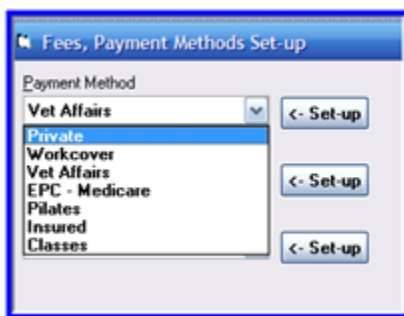
- Add or delete Payment Methods
- Click Add and make your own payment methods list (e.g. Private, Workcover)
- Move these into your order of preference by clicking on a Payment Method and using the up down buttons to move it up or down the list
- Click Exit



- On the Payment Method Setup List select the Account and Receipt Layout designs you would like to use for each Payment Method
- Click Exit



- Save the changes.
- You are now ready to insert your Fees and description and build your list of charges.



- Select the Payment Method



- Click Add New

Item Code (if any) **500**

Medicare Code **10960**

Description **Initial Consultation**

Normal Fee \$ **115.00** Other 1 **103.50** Requires GST ☐

Expected Rebate **0.00** Other 2 **100.00**

Discount **105.00** Other 3 **60.00**

☐ Is a Class Pack Item

**Save** **Don't save**

- Type in Item Code, Description and Fee



- Click Save
- Continue this process until all your fees and charges have been entered

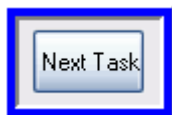
Treatment Location

**Home Visits** <- Set-up

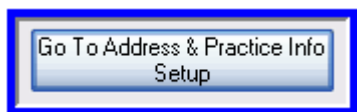
Rooms

Home Visits

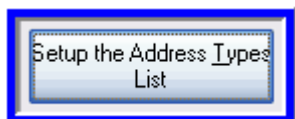
- Remembering to do the same for different locations (if required)
- Click Exit when you have finished this process.



- Click Next Task



- Click Go To Address & Practice Info Setup



- Click Setup Address Types List to set up your contact details for referrals, work places, insurance companies etc.

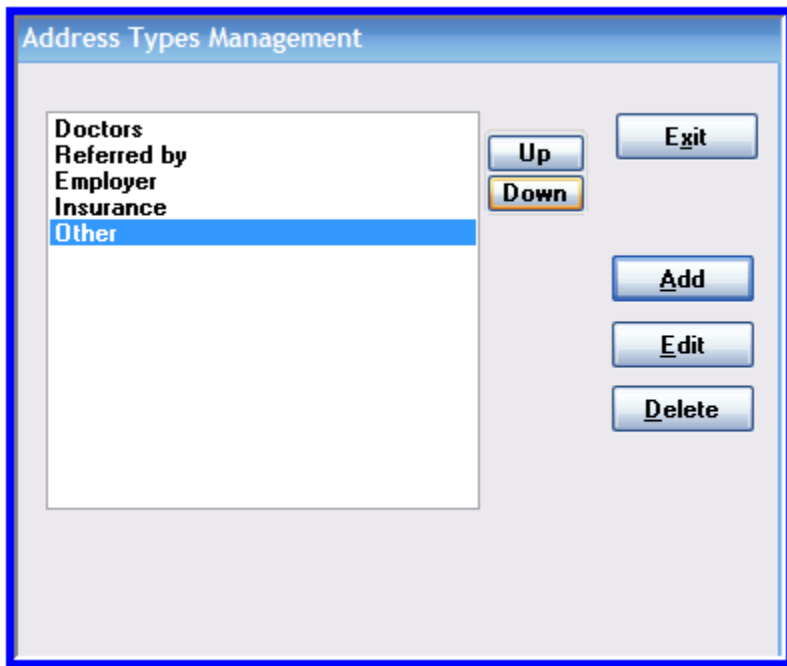


The screenshot shows a window titled "Address Types Management". On the left, there is a list box containing the following items: "Doctors" (highlighted in blue), "Referred by", "Employer", and "Insurance". To the right of the list box are two buttons: "Up" and "Down". Further to the right are four buttons stacked vertically: "Exit", "Add", "Edit", and "Delete".

- Click Add and Enter different List Headings

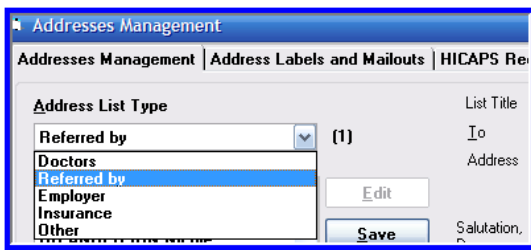
The screenshot shows the same "Address Types Management" window. The list box is empty. Below the list box, there is a label "New entry title" followed by a text input field containing the word "Other". To the right of the input field are four buttons stacked vertically: "Exit", "Save", "Edit", and "Cancel".

- Click save



The 'Address Types Management' window features a list box on the left containing the following items: Doctors, Referred by, Employer, Insurance, and Other. The 'Other' item is currently selected and highlighted in blue. To the right of the list box are two buttons: 'Up' and 'Down'. Further to the right are four buttons stacked vertically: 'Exit', 'Add', 'Edit', and 'Delete'.

- Use the Up & Down buttons to put these in the order that best suits
- Click Exit



The 'Addresses Management' window has three tabs: 'Addresses Management', 'Address Labels and Mailouts', and 'HICAPS Re:'. The 'Addresses Management' tab is active. It contains a section for 'Address List Type' with a dropdown menu showing 'Referred by' (with a count of 1) and a list of options: Doctors, Referred by, Employer, Insurance, and Other. To the right of this section are buttons for 'Edit' and 'Save'. On the far right, there are labels for 'List Title', 'To', 'Address', and 'Salutation'.

- Select List



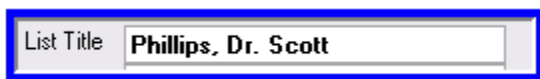
A button labeled 'New entry' is shown, highlighted with a blue border.

- Click New Entry



A text input field labeled 'To' contains the text 'Dr. Scott Phillips'.

- In the "To" line – enter the name as it would appear on a letter or envelope



A text input field labeled 'List Title' contains the text 'Phillips, Dr. Scott'.

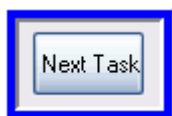
- In the "List Title" – enter the name how to appear on your list (Lastname, Dr. Firstname)
- Add Address information and anything else here you need.

- Click Save

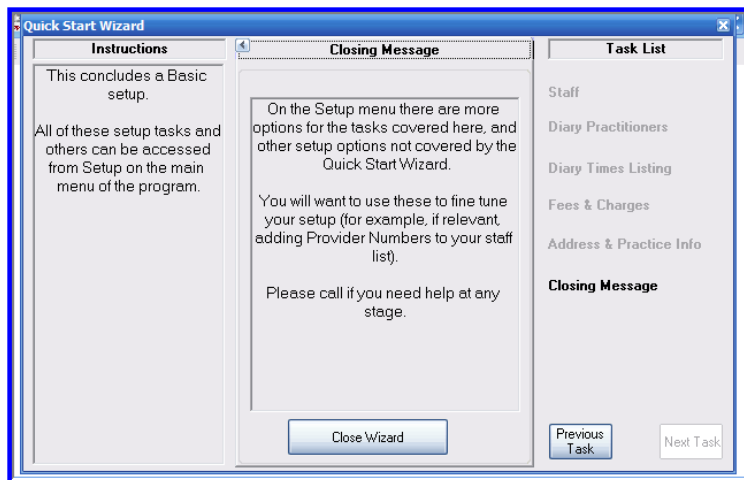


- Continue this way to build your address lists

- When lists are complete click on Reports Header Tab
- Enter in your Pracatice Details
- Click Save & Exit



- Click Next Task

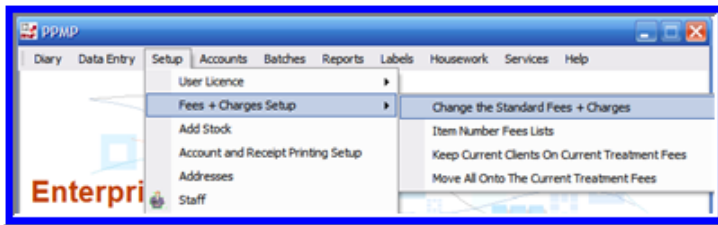


- This concludes the Basic Setup
- Close Wizard

## Section 2 – Additional services

### 1 DVA Procedure

Before we start...



- Go to Setup
- Fees & Charges
- Change the Standard Fees & Charges

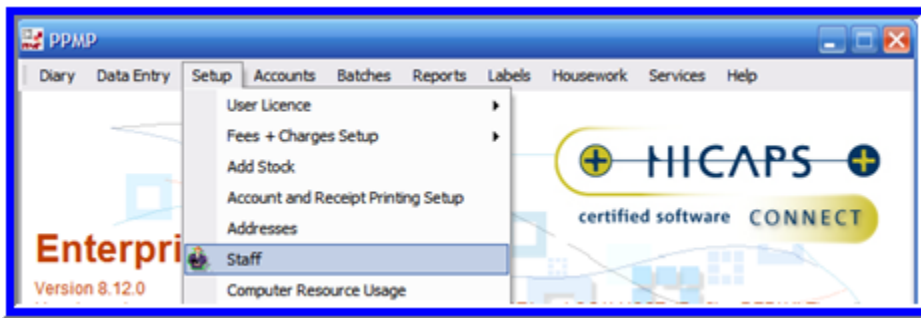
The screenshot shows the 'Fees, Payment Methods Set-up' window. The 'Payment Method' is set to 'Medicare'. The 'Treatment Location' is 'Rooms Treatments'. The 'Charge Type' is 'Treatment Charges'. The 'Entries list' shows 'Physiotherapy Consultation Item 10'. The 'Item Code if any' is '10960'. The 'Description' is 'Physiotherapy Consultation Item 10960'. The 'Normal Fee \$' is '72.00', 'Expected Rebate' is '0.00', and 'Discount' is '69.00'. The 'Requires GST' checkbox is unchecked.

- Under Payment Method select DVA / Medicare  
(If you don't have them already – Add New Payment Methods called Medicare & DVA or Veteran Affairs)

The screenshot shows the 'Fees, Payment Methods Set-up' window. The 'Payment Method' is set to 'D.V.A.'. The 'Treatment Location' is 'Rooms'. The 'Charge Type' is 'Treatment'. The 'Entries list' shows 'Std Consultation (PH20)' and 'Extended Consultation (PH30)'. The 'Item Code if any' is 'PH20'. The 'Description' is 'Std Consultation (PH20)'. The 'Normal Fee \$' is '55.00', 'Expected Rebate' is '0.00', and 'Discount' is '0.00'. The 'Requires GST' checkbox is unchecked. The 'PH20' Medicare Code is circled in red.

- Make sure ALL Medicare & DVA Payment Methods have the correct information entered (including Item Numbers)
- Click Exit

## 1.1 Setting up staff



- Go to Setup
- Staff

The screenshot shows the 'Staff' window. At the top, there's a 'Staff List' with 'John' selected. Below it are buttons for 'Up', 'Dn', 'Exit', and 'Add new'. A red arrow points from the 'Staff List' to the 'Details' tab. The 'Details' tab is active, showing various fields for staff setup. A red arrow points from the 'Save Provider No Details To All Payment Methods' button to the 'Details' tab. The fields include:

- Treatment Location:** 1 Rooms
- Payment Method:** 2 D.V.A.
- HICAPS Group Item Type:** 3 Physiotherapy
- Provider No:** 4 0718645Y
- Medicare Online:**
  - Claim Type:** 5 DVA Allied Health
  - Claim Service Type:** 6 J - DVA Allied
- Address:** Suite 118, 40 Burgundy Street, Heidelberg, VIC, 3084

Buttons on the right include 'Save Provider No Details', 'Save Provider No Details To All Payment Methods', and 'View Hicaps Item Number List'.

- Select the staff member from the list
- Click Provider No's TAB
- Select the Treatment Location – 1  
(These steps must be repeated for each Treatment Location)
- Payment Method - 2
- Select Hicaps Group (Physiotherapy) - 3
- Enter the Provider Number - 4
- Under MedicareOnline – Claim Type - select DVA Allied Health - 5
- Claim Service Type – Select - J-DVA Allied - 6  
(Unless your Profession is actually listed)
- Press Save Provider No Details to All Payment Methods

**Repeat for each Staff Member & each Treatment Location**

## 1.2 Setting up DVA clients and verification

Open client file

The screenshot shows the 'Client Details' window with the following information:

- Title: Mr, Gender: Male, Client#: 20873
- Salutation: Mr, Dear: JOHHANNA
- Diary Name: JOHHANNA TIM
- Surname: JOHHANNA
- First Name: TIM
- Middle Name:
- Complete Address: 69 Deanne Cr, Avoca Dell, SA 5253
- Email:
- Comments etc:
- Phone Work:
- Home:
- Mobile:
- Eax:
- D.O.B: 03/03/1959
- Date Started: 17/03/2012
- Occupation:
- Why They Chose Us:
- Medical Records Details:
  - Chart Ref:
  - Medicare No.:
  - Medicare DVA use ONLY!:
  - Suburb: Avoca Dell
  - Postcode: 5253
  - Pensioner No.:
  - Safety Net:
  - Health Care Card No.:
  - Veteran Affairs No.: 5K900658
- Medicare Verification button

- Enter in ALL Client information
- Enter Medicare DVA requested information (Suburb, Postcode & Veteran's Affair Number)

The screenshot shows the 'Medicare Online Verification Selection' window with the following information:

- Select Option: Patient Verification Results | Veteran Verification Results
- Online Patient Verification - Patient Verification Medicare
- Online Veteran Verification (selected)
- Submit button

- Select Online Veteran Verification
- Click Submit

The screenshot shows a confirmation dialog box with the following information:

- PPMP - Medicare Verification
- Are you sure you wish to submit this verification to Medicare Online?
- Yes button
- No button

- Click Yes

The screenshot shows the 'Medicare Online Verification Selection' window with the following information:

- Medicare Online Verification Selection
- Contacting Medicare.....please wait

- Your request is being processed...please wait

The screenshot shows a window titled "Medicare Online Verification Selection". It has three tabs: "Select Option", "Patient Verification Results", and "Veteran Verification Results". The "Patient Verification Results" tab is active. It contains three sections: "Report Status Information" with a text box showing "Report Status Code [0] - The task has been completed successfully. TransactionId - NJL000006703513ba837701"; "Medicare Status Information" with a text box showing "Medicare Status Code [0] - The task has been completed successfully."; and "Medicare System Patient Details" with a "Veteran Card Type" dropdown menu set to "PTEC - Gold Card". An "Exit" button is in the bottom right corner.

- Check the Results (The task has been completed successfully)
- Click Exit

If there are differences between the data you submit and what Medicare have on file you will get the below screen

The screenshot shows the same "Medicare Online Verification Selection" window, but the "Patient Verification Results" tab shows a mismatch. The "Report Status Information" section shows "Report Status Code [0] - The task has been completed successfully. TransactionId - NJL000006703513bb8c7c01". The "Medicare Status Information" section shows "Medicare Status Code [B005] - The individual has been matched using the submitted data however differences were identified. Please check the information returned and update your records.". The "Medicare System Patient Details" section shows "First Name : NED", "Surname : LISA", and "Veteran Card Type : PTEC - Gold Card". There is an "Update Patient Details" button and an "Exit" button.

- Click Update Patient Details

The screenshot shows a "Confirmation" dialog box with a question mark icon. The text inside says "Update client record with the information returned from the Medicare Online System?". There are two buttons: "Yes" and "No".

- Click Yes



- Close Client Details screen and save changes

### 1.3 Treatment charging, recording and transmitting the voucher

- Right click on Client Name on Diary
- Select Treatment Charge

- Make sure there is an Item Number under Medicare Item #
- Treatment Charge as normal
- Click Accept and Pay

From the Payment screen

Date	Description	Amount	Unpaid	Paying Practitioner	DVA Claim
30/07/2014	Standard Consultation	63.30	63.30	63.30 Kathy	

Totals: 63.30 | 63.30

Buttons: Edit Entry, Paying Some, Print Account, Paying All, EFTPOS Payment, Medicare DVA Claim, Claim Medicare

- Double Click in the Paying field

**Medicare**

**Medicare DVA Claim**

- Click on Medicare DVA Claim

Search Criteria:

Creation Date From: 4/02/2013 To: 11/02/2013

Claim#:

Practitioner: (Unspecified)

Submitted Date From: 4/02/2013 To: 11/02/2013

Processed Report From: 4/02/2013 To: 11/02/2013

Payment Report From: 4/02/2013 To: 11/02/2013

Search

Claims

DateCreated	Claim#	PayeeProvider#	Submission Date	Processed Date	Payment Date

Add

Delete

Vouchers

Claim#	Voucher#	Patient Name	Veteran#

Add

Delete

Services

Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#

Add

Delete

Submit Claim to Medicare

View Client Voucher

Retrieve Process/Payment Reports

View Claim Process Report

View Claim Payment Report

Exit

The above screen is the Main screen. This screen allows you to:

- Search (existing Claims)
- **Create Claims**
- Delete Claims
- View/Print Reports

- Under Claims, Click Add

- A New Claim will be added

Claim#	Voucher#	Patient Name	Veteran#

- Under Vouchers, Click Add

Medicare Online DVA
DVA Claims
DVA Claim Details

Medicare Claim Type : DVA Allied Health
Medicare Claim Service Type : J - DVA Allied

Voucher Details :
Voucher Id : 1
Patient First Name : DAVID
Patient Family Name : GABRIEL
Patient Date Of Birth (dd/mm/yyyy) : 11/04/1976
Gender : ☒ Male ☐ Female
Patient Address Locality :
Patient Address Postcode : 3040
Veteran File # : VX6873432
Practitioner : Andrew Hahne
Serving Provider # : 1234566g

Accepted Disability Description :
☐ Service rendered in hospital?
☐ White Card holder?
☐ Include Referral/Request Details

Service Details :
Service Id : 1
Date Of Service (dd/mm/yyyy) : 05/08/2015
Item # : PH20
Charge Amount (\$) : 75.00
Distance Kms :
Service Text :
Account Reference # :
Admission Date (dd/mm/yyyy) : 05/08/2015
Discharge Date (dd/mm/yyyy) : 05/08/2015
Equipment Id :
No. of Patients Seen :
No. of Teeth :
Upper or Lower Jaw Type :
Optical Restriction Override :
Self Deemed Service Type :
Time of Service (hh:mm 24hr) : 00:00
Time Duration (in 15min intervals) :
☐ Provision for second medical grade footwear?
☐ Practitioner attended patient on more than one occasion on same day?
☐ Service part of a multiple procedure?

\* Mandatory Field

- All sections marked with \* MUST be entered

Referral Period :	13	Referral Provider # :	2054781W
-------------------	----	-----------------------	----------

- If the above 2 fields are filled in – DELETE contents (unless the client is a WHITE CARD HOLDER)

- Click Save & Go Back

Medicare Online DVA Paperless Streamlined

DVA Claims Unsubmitted | DVA Claim Details

Search Criteria:

Creation Date From: ☒ 7/12/2012 To: 14/12/2012

Claim#:

Practitioner: (Unspecified)

Submitted Date From: ☐ 7/12/2012 To: 14/12/2012

Processed Report From: ☐ 7/12/2012 To: 14/12/2012

Payment Report From: ☐ 7/12/2012 To: 14/12/2012

Search

Claims

DateCreated	Claim#	PayeeProvider#	Submission Date	Processed Date	Payment Date
14 Dec 2012	A0354@	2413101A			

Add

Delete

Vouchers

Claim#	Voucher#	Patient Name	Veteran#
A0354@	1	Daphne, Desmond	TX900408

Add

Delete

Services

Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#
A0354@	1	1	23/09/2012	35	311438

Add

Delete

Submit Claim to Medicare

View Client Voucher

Retrieve Process/Payment Reports

View Claim Process Report

View Claim Payment Report

Exit

- We have recorded 1 Claim (contains 1 service/1 voucher)

Submit Claim to Medicare

- Click Submit to Medicare

PPMP

Are you sure you wish to submit this claim to Medicare Online?

Yes No

- Click Yes – you will receive notification that it has been sent.

**NB: Please note PPMP allows you to create a claim with multiple vouchers and multiple services within each voucher. However we HIGHLY RECOMMEND one voucher per claim for auditing and maintenance purposes.**

#### 1.4 Record white card holders

On Client Details Screen

Veteran Affairs No. SX900658

- Insert Veteran Affairs No

Client Details

Exit Edit A/C Info Episodes Letters/Email

**Main Details** More Details Notes (Empty)

- Click More details

**White Card Holder?** ☒

- Tick White Card Holder
- Exit & Save Changes

Karen's

Actions Records Find Options Refresh Print Classes ToDo Lists Waiting Lists SMS

< Month < Week < Day 29/11/2013 **Fri** Day > Week > Month >

Time	John (1)	Sam	Mabel
9:00am			
9:15am			
9:30am			
9:45am			
10:00am			
10:15am	Johanna Tim		

Appointment (F6)  
Treatment Charge (F7)  
Note In Diary (Ctrl+N)

- Treatment Charge the client

Charges

Client Name :-Tim Johanna A/C No 20905

Date	Item Code	Medicare Item#	Description	(Item Number)	Fee	Normal Fee	GST	Total
29/11/2013	PH20		Std Consultation		55.00	55.00	0.00	55.00

Start Time (24hr) : Duration hh:mm

☐ Add GST ☐ Reverse GST status - keep same total charge

Click For Medicare Benefit Schedule (MBS)

Standard Entries

- Initial Consultation
- Std Consultation
- Extended Consultation
- Travel

Accept Cancel Accept + Pay Accept + Additional Charge Accept + More

- Click Accept & Pay (or Accept & More if adding Travel)

Payment

Client No. 20905 Episode Back

Name Johanna Tim

Date	Description	Amount	Unpaid	Paying Practitioner	DVA ClaimId(s)
29/11/2013	Std Consultation	55.00	55.00	55.00 John	

Totals 55.00 55.00

Discount Entry by

Edit Entry Paying Some HICAPS Claim HICAPS Medicare DVA Claim

Print Account Paying All EFTPOS Payment Cancel HICAPS Transactions Claim Medicare Exit

- Double Click in Paying Field
- Click Medicare DVA Claim

Claims								Add
DateCreated	Claim#	PayeeProvider#	Submission Date	Processed Date	Payment Date	Claim Type	Note	
29 Nov 2013	A0095@	2413101A				DVA Allied Health		

- Under Claims – Click Add

Vouchers				Add
Claim#	Voucher#	Patient Name	Veteran#	

- Under Vouchers – Click Add

Medicare Online DVA

DVA Claims | **DVA Claim Details**

Medicare Claim Type : DVA Allied Health  
 Medicare Claim Service Type : J - DVA Allied

Voucher Details :  
 Voucher Id : 1  
 Patient First Name : DAVID  
 Patient Family Name : GABRIEL  
 Patient Date Of Birth (dd/mm/yyyy) : 11/04/1976  
 Gender : ☐ Male ☐ Female  
 Patient Address Locality :  
 Patient Address Postcode : 3040  
 Veteran File # : VV6873432  
 Practitioner : Andrew Hahne  
 Servicing Provider # : 1234566g

Accepted Disability Description : HAMSTRING  
☐ Service rendered in hospital?  
☒ White Card holder?  
☐ Include Referral/Request Details

Service Details :  
 Service Id : 1  
 Date Of Service (dd/mm/yyyy) : 05/08/2015  
 Item # : PH20  
 Charge Amount (\$) : 75.00  
 Distance Kms :  
 Service Text :  
 Account Reference # :  
 Admission Date (dd/mm/yyyy) : 05/08/2015  
 Discharge Date (dd/mm/yyyy) : 05/08/2015  
 Equipment Id :  
 No. of Patients Seen :  
 No. of Teeth :  
 Upper or Lower Jaw Type :  
 Optical Restriction Override :  
 Self Deemed Service Type :  
 Time of Service (hh:mm 24hr) : 00:00  
 Time Duration (in 15min intervals) :  
☐ Provision for second medical grade footwear?  
☐ Practitioner attended patient on more than one occasion on same day?  
☐ Service part of a multiple procedure?

Submit Claim to Medicare  
 Retrieve Process/Payment Reports  
 View Client Voucher  
 View Claim Process Report  
 View Claim Payment Report  
 Exit

Save & Go Back Cancel

\* Mandatory Field

- White Card Holder should be ticked
- Accepted Disability Description should be inserted (this information will be taken from Episode screen -> Presenting Problem)
- **Tick** Include Referral/Request Details

☒ White Card holder?

Accepted Disability Description :

☒ Include Referral/Request Details

Requesting Provider # :

Request Issue Date (dd/mm/yyyy) :

Request Override Type :

Referral Issue Date (dd/mm/yyyy) :

Referral Override Type :

Referral Period :

Referral Period Type :

Referral Provider # :

- **Tick** Referral Issue Date
- Referral Period should be inserted
- Referral Provider Number should be inserted
- Make sure ALL \* Fields are filled in
- Click Save & Go Back

Submit Claim to Medicare

- Click Submit to Medicare

### 1.5 How to record travel - Km's

**NB: DVA do not pay the first 10km's.**

When recording Travel ADD it to the same Claim & Voucher as the Treatment

PPMP -Diary

Actions Records Find Options Refresh Print Classes ToDo Lists Waiting Lists SMS Apt

< Month < Week < Day 20/11/2013 Wed Day > Week > Mo

	John (1) (1)	Sam	Mabel
9:00am			
9:15am			
9:30am	\$-JOHHANNA TIM		
9:45am			
10:00am			

Appointment (F6)

Treatment Charge (F7)

Note In Diary (Ctrl+N)

- Right Click
- Treatment Charge

Choose A Client Episode

[No Episode Selected]

Back

Shoulder

Ok

Cancel

- Select Episode (if requested)



Client Name: JOHHANNA TIM A/C No 20873

Date: 20/11/2013 Item Code: PH20 Medicare Item#: PH20 Description: Std Consultation (Item Number): Fee: 55.00

Start Time (24hr): Duration hh:mm

[Click For Medicare Benefit Schedule \(MBS\)](#)

Standard Entries: Initial Consultation, Std Consultation, Extended Consultation, Travel

Buttons: Accept, Cancel, Accept + Pay, Accept + Additional Charge, Accept + More

- Click Accept & More  
(Or **Accept & Additional Charge** if Travel charges are on your Item No Fee Lists)

Client Name: Tim Johhanna A/C No 1464

Date: 30/07/2014 Item Code: KM Medicare Item#: Description: Travel (20 km) (Item Number): Fee: 15.00 Normal Fee: 15.00 GST: 0.00 Total: 15.00

Start Time (24hr): Duration hh:mm

[Click For Medicare Benefit Schedule \(MBS\)](#)

Standard Entries: P910 Initial Consultation, P920 Standard Consultation, P930 Extended Consultation, P950 Group Physiotherapy, Travel

Buttons: Accept, Cancel, Accept + Pay, Accept + Additional Charge

- Charge for Travel – making sure you have **KM** in the Item Code

Client No. 20905 Name: Johhanna Tim Episode: Back

Date	Description	Amount	Unpaid	Paying Practitioner	DVA ClaimId(s)
27/11/2013	Std Consultation	55.00	55.00	John	
27/11/2013	Travel (@ 76 cents per km - over the first	7.60	7.60	John	

Totals: 62.60 55.00

Buttons: Discount Entry, Edit Entry, Print Account, EFTPOS Payment, HICAPS, Medicare, Exit

- Double Click in the Paying Column to record the payment for the Treatment
- Click Medicare DVA Claim

DateCreated	Claim#	PayeeProvider#	Submission Date	Processed Date	Payment Date	Claim Type	Note
29 Nov 2013	A0095@	2413101A				DVA Allied Health	

Buttons: Add

- Click Add (to add the claim)

Vouchers

Claim#	Voucher#	Patient Name	Veteran#

Add

- Click Add (to add the voucher)
- Make sure all \* fields are filled in (don't forget to delete Referral Period & Referral Provider #)
- Click Save & Go Back

Medicare Online DVA

DVA Claims | DVA Claim Details

Search Criteria:

Creation Date From: 22/1/2013 To: 29/1/2013

Claim#:

Claim Type:

Practitioner: [Unspecified]

Client:

Submitted Date From: 22/1/2013 To: 29/1/2013

Processed Report From: 22/1/2013 To: 29/1/2013

Payment Report From: 22/1/2013 To: 29/1/2013

Search

Submit Claim to Medicare

Retrieve Process Payment Reports

Claims

DateCreated	Claim#	Payer/Provider#	Submission Date	Processed Date	Payment Date	Claim Type	Note
29 Nov 2013	A0095@	2413181A				DVA Allied Health	

Add

Delete

Vouchers

Claim#	Voucher#	Patient Name	Veteran#
A0095@	1	Johanna Tim	00000000

Add

Delete

Services

Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#
A0095@	1	1	27/11/2013	PH20	313600

Add

Delete

View Client Voucher

View Claim Process Report

View Claim Payment Report

Exit

- **DO NOT SUBMIT TO MEDICARE**
- Click Exit

Payment

Client No: 20905

Name: Johanna Tim

Episode: Back

Date	Description	Amount	Unpaid	Paying Practitioner	DVA ClaimId(s)
27/11/2013	Std Consultation	55.00	55.00	John	A0095@
27/11/2013	Travel (@ 76 cents per km - over the first	7.60	7.60	7.60 John	

Discount Entry by

Totals 62.60 7.60

Edit Entry

Print Account

Paying Some

Paying All

EFTPOS Payment

HICAPS

Claim HICAPS

Quote HICAPS

Cancel HICAPS Transactions

Medicare

Medicare DVA Claim

Claim Medicare

Exit

- Back on the Payment screen
- Double Click in the Paying Field next to Travel charge
- Click Medicare DVA Claim

Services

Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#
A0095@	1	1	27/11/2013	PH20	313600

Add

- Select the same Claim/Voucher
- Under the Services Claim - Click Add

Item # :	KM	*
Charge Amount (\$) :		
Distance Kms :	20	

- Make sure Item # has KM
- Remove the Charge Amount
- Insert TOTAL Distance Kms (DVA will pay less 10 km's)
- Click Save & Go Back

Services					
Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#
A0095@	1	1	27/11/2013	PH20	313600
A0095@	1	2	27/11/2013	KM	313601

- Note the service (2 = Km) has been added to the same voucher / claim as the original service fee

Submit Claim to Medicare

- Click Submit to Medicare

## 1.6 How to record stock

### **NB: DVA ADD GST TO THE STOCK ITEM AT THE TIME OF PAYMENT**

When recording Stock ADD it to the same Claim & Voucher as the Treatment

- Right Click
- Treatment Charge

Choose A Client Episode

[No Episode Selected]

Back

Shoulder

Ok

Cancel

- Select Episode (if requested)

- Click Accept & Additional Charge

- Click Standard Charges

- Select Item from list
- Click OK

**NB: DO NOT ADD GST TO THE CHARGE AT THIS STAGE**  
 (if GST is required you need to add it AFTER you have submitted to Medicare as they add GST to your total billed)

- Click Accept (OK)
- OR OK (receipt) to go straight to payment screen

Back on the Diary – if you chose Account (OK)

- Go to Actions

- Payment

DateCreated	Claim#	PayeeProvider#	Submission Date	Processed Date	Payment Date	Claim Type	Note
29 Nov 2013	A8895@	2413181A				DVA Allied Health	

Add

- Click Add (to add the claim)

Claim#	Voucher#	Patient Name	Veteran#

Add

- Click Add (to add the voucher)
- Make sure all \* fields are filled in (don't forget to delete Referral Period & Referral Provider number – unless they are White Card Holder)
- Click Save & Go Back

Medicare Online DVA

DVA Claims Details

Search Criteria:

Creation Date From: 22/11/2013 To: 29/11/2013

Claim#:

Claim Type:

Practitioner: (Unspecified)

Client:

Submitted Date From: 22/11/2013 To: 29/11/2013

Processed Report From: 22/11/2013 To: 29/11/2013

Payment Report From: 22/11/2013 To: 29/11/2013

Search

Claims

DateCreated	Claim#	PayeeProvider#	Submission Date	Processed Date	Payment Date	Claim Type	Note
29 Nov 2013	A8895@	2413181A				DVA Allied Health	

Add

Delete

Vouchers

Claim#	Voucher#	Patient Name	Veteran#
A8895@	1	Johnston, Tim	50089518

Add

Delete

Services

Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#
A8895@	1	1	1/22/11/2013	PH09	313688

Add

Delete

Submit Claim to Medicare

Retrieve Process/Payment Reports

View Client Voucher

View Claim Process Report

View Claim Payment Report

Exit

- **DO NOT SUBMIT TO MEDICARE**
- Click Exit

Payment

Client No: 2138

Name: Mouse, Mickey

Episode: General

Date	Description	Amount	Unpaid	Paying Practitioner	DVA ClaimId(s)
27/12/2014	Initial Consultation	63.30	63.30	Brenton	A8892@
27/12/2014	Stockings - Small	35.00	35.00	Brenton	

Discount Entry by: Totals 98.30 35.00

Edit Entry

Paying Some

Print Account

Paying All

EFTPOS Payment

HICAPS

Claim HICAPS

Quote HICAPS

Cancel HICAPS Transactions

Medicare

Medicare DVA Claim

Claim Medicare

Exit

- Back on the Payment screen
- Double Click in the Paying Field next to Additional Charge
- Click Medicare DVA Claim

Claims (1)							
DateCreated	Claim#	PayeeProvider#	Submission Date	Processed Date	Payment Date	Claim Type	Note
26 Nov 2014	A0002@					DVA Allied Health	

- Select the same Claim/Voucher (under Claims – top section)

Services (1)					
Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#
A0002@	1	1	02/12/2014	PH10	33892

- Under the Services Claim - Click Add

Item # :	PH94 *
Charge Amount (\$) :	35.00

- Make sure Item number is present

Save & Go Back
----------------

- Click Save & Go Back

Services (2)						
Claim#	Voucher#	Service#	ServiceDate	Item#	Trans#	
A0002@	1	1	02/12/2014	PH10	33892	
A0002@	1	2	02/12/2014	PH94	33893	

- Note the 2 services have been added to the same voucher

Submit Claim to Medicare
--------------------------

- Click Submit to Medicare

Payment						
Client No.	2138	Episode: General				
Name	Moose, Mickey					
Date	Description	Amount	Unpaid	Paying Practitioner	DVA Claimid(s)	
02/12/2014	PH10 Initial Consultation	63.30	63.30	Clare	A0002@	
02/12/2014	Stockings - Small	35.00	35.00	Clare	A0002@	

- Back on the Payment screen you will see that the service has been added to the same DVA Claim
- Exit and return back to the Client's Account information screen (if you need to Add GST)

Back in the Client Account Information Screen

Account details for Mickey Mouse												
Episode	All Episodes		Unpaid Total : \$98.30									
Client#	2138		Deposit Held : \$0.00									
Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location
02/12/2014	PH10 - PH10 Initial Consult...	1		63.30			63.30	63.30		1	Clare	Rooms
02/12/2014	SS - Stockings - Small			35.00			35.00	98.30		1	Clare	Rooms

- Select the item that requires GST
- Select Ctrl G (on your keyboard)



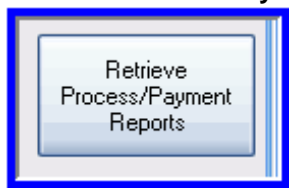
- This will bring up the “Change” button
- Click Change

Charges for Mickey Mouse:						
(NB Only entries with a description are recorded)						
Date	Code	Description	Fee	X	Net Total	GST Total MedicareCode
02/12/2014	SS	Stockings - Small	\$35.00		35.00	3.50 38.50 P1494

- Click in the “GST” column (this will add GST to your total)
- This should now be the amount that you will receive from Medicare

## 1.7 DVA Reports

### Retrieve Process/Payment Reports



- Click Retrieve Process/Payment Reports

**NB: Select this once/twice a day to check if Medicare has processed the claim(s), (usually a 48 hour turn around by Medicare). If a claim has been processed and/or paid, then PPMP will display the relevant date on the main screen beside the applicable claim.**

### View & Print Client Vouchers (Patient Copy)

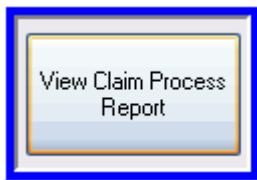


- Click View Client Voucher

Department of Veterans' Affairs				D12165
Health Practitioner Service Voucher				
LSPN : Location ID : NJL00000				
<b>Patient Details</b> DVA File Number : S1900658 First Name, Initial, Surname : TIM JOHNSON Date of Birth : 01/01/1958		Telephone No : Residential Address : 69 Deanne Cr Avoca Dell SA 5253		
This DVA claim has been:				
Name of practitioner who Rendered the services : Sam Ziggy Provider No : 24132716		Payee Provider : John Miller Payee Provider No : 2413101A Account Ref No : Treatment Location : RL Rooms Name of Hospital or Nursing Home (if applicable): KMs Travelled: Condition treated (While card holders and emergencies only):		
Requesting/Referring practitioner's name : Provider No : Date of Referral : Period of Referral :				
Date of Service	Item No	Amount Claimed	Text	Additional Text
28/03/2013	10980	\$65.00		
<b>PRIVACY NOTE:</b> The information sought on this form is to enable service verification and claim processing. This information will be disclosed to Medicare Australia to process the payment. I certify that I have received the services described on this voucher, or the Practitioner has requested Pathology tests for me. I am not entitled to claim third party or worker's compensation for these services.				
Patient Signature		Date		
or I certify				
<input type="checkbox"/> That the patient is unable to sign		<input type="checkbox"/> The service is associated with an emergency		

- Print this and give a copy to the Patient (if requested)

### View Claim Process Report



- Click Claim Process Report

**Medicare DVA Processing Report**

Claim# A0002@ (DVA Allied Health)      Processed Date :      Payment Date :

Voucher# : 1      Service# : 1

Client# : 218      Item : PMP Initial Consultation      Staff :      Trans# : 3382

AccountReferenceNum :	
CardFlag :	
ChargeAmount :	43.30
ClaimChargeAmount :	
CardService (00000000) :	02/02/2014
ExplanationCode :	
OST Indicator :	PH00
ItemNum :	
NumOfPaymentsSeen :	
NumberOfServices :	
PatientFamilyName :	Wicks
PatientFirstName :	Wicks
ServiceBenefitAmount :	\$ 43.30
ServicingProviderNum :	20100000
VariantRefNum :	02/02/2014

Voucher# : 1      Service# : 2

Client# : 218      Item : Bookings - Small      Staff :      Trans# : 3383

AccountReferenceNum :	
CardFlag :	
ChargeAmount :	35.00
ClaimChargeAmount :	
CardService (00000000) :	02/02/2014
ExplanationCode :	
OST Indicator :	PH00
ItemNum :	
NumOfPaymentsSeen :	
NumberOfServices :	
PatientFamilyName :	Wicks
PatientFirstName :	Wicks
ServiceBenefitAmount :	\$ 35.00
ServicingProviderNum :	20100000
VariantRefNum :	02/02/2014

- The report displays details of the selected Claim that have been submitted to Medicare

### View Payment Report



- Click on View Claim Payment Report

PPMP

Would you like to include the DVA Claim Processing details?

Yes      No

- Selecting Yes will give you detailed report
- No will give a summary

**Medicare DVA Processing Report**

Claim# A0002@ (DVA Allied Health)      Processed Date : 28/11/2014      Payment Date : 28/11/2014

Voucher# : 1      Service# : 1

Client# : 242      Item : Extended Consultation      Staff :      Trans# : 625

AccountReferenceNum :	
CardFlag :	
ChargeAmount :	67.10
ClaimChargeAmount :	
CardService (00000000) :	28/11/2014
ExplanationCode :	
OST Indicator :	PH00
ItemNum :	
NumOfPaymentsSeen :	
NumberOfServices :	
PatientFamilyName :	Tout
PatientFirstName :	Lanka
ServiceBenefitAmount :	\$ 67.10
ServicingProviderNum :	21100000
VariantRefNum :	02/11/2014

Receipt# : 285

- Report displays Claims that have been paid
- Exit

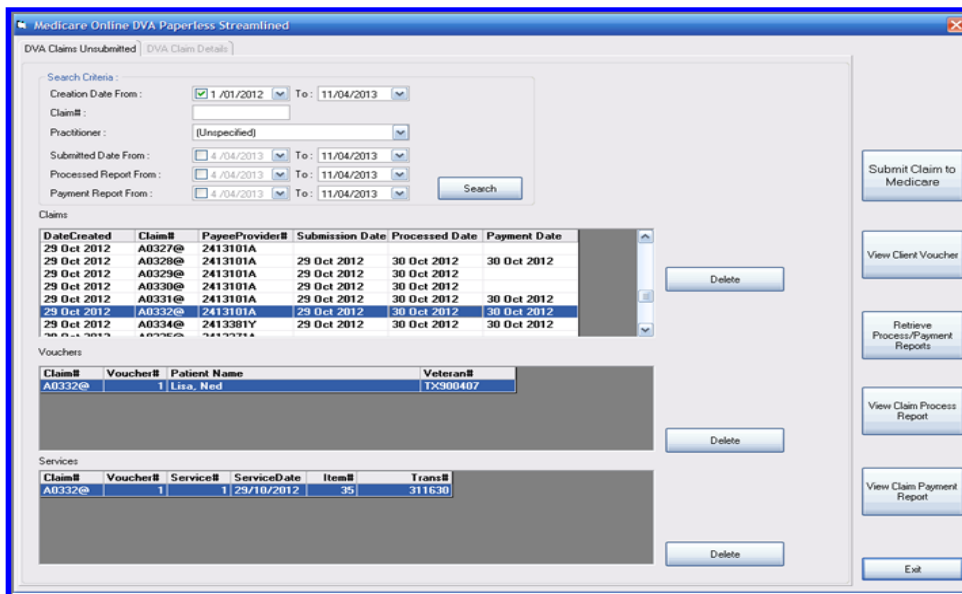
### To View / Transmit Claims



On the Main Screen of PPMP



- Go to Accounts
- Transmit Medicare DVA Claims



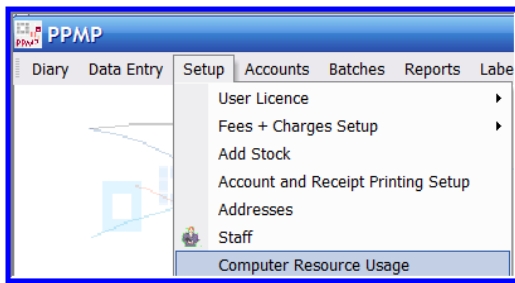
- Insert Date Range
- Click Search
- The display will show all Claims that have been Submitted, Processed and Paid within the selected search parameters.

## 2 HICAPS

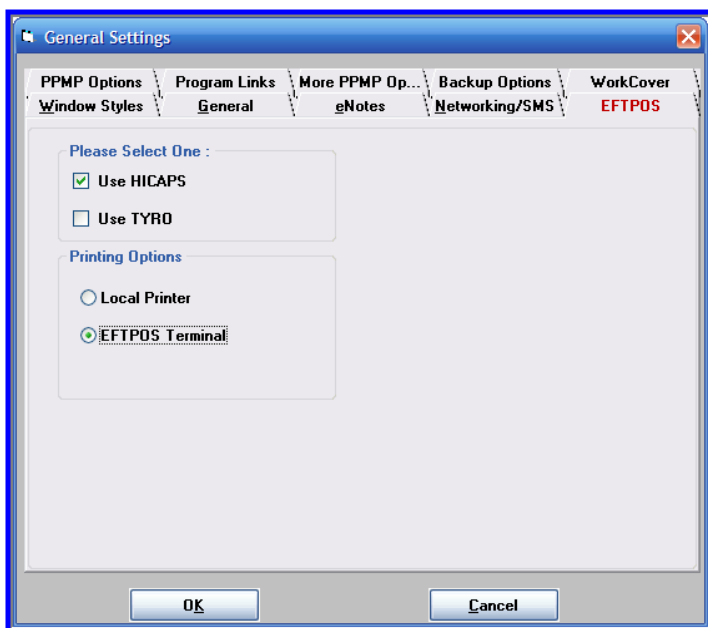
### 2.1 HICAPS installation & activation

Click [HERE](#) to watch video

**NB:** If you are using the HICAPS Integration you will need to Activate HICAPS first.  
From the Main Menu of PPMP®



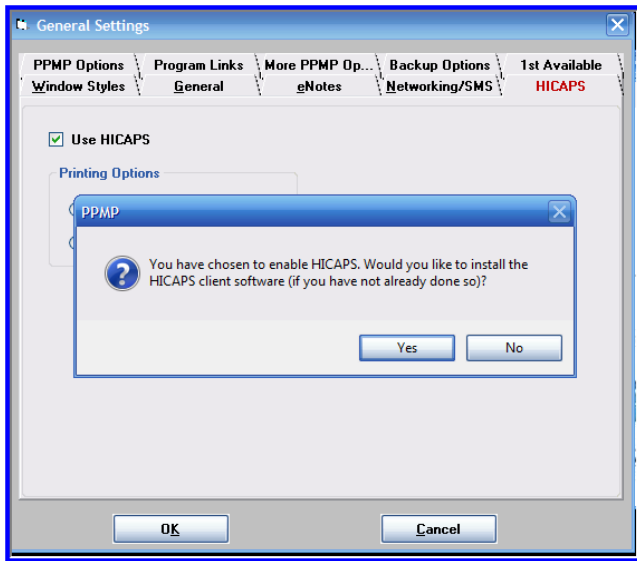
- Click on the Setup Menu
- Click on 'Computer Resource Usage'
- Click on the EFTPOS tab



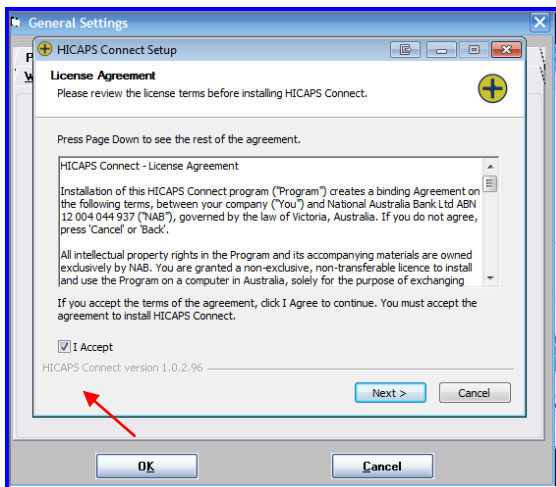
- Click OK
- Tick "Use HICAPS"
- Tick "HICAPS Terminal"
- Click OK

**Restart the program for the activation to start.**

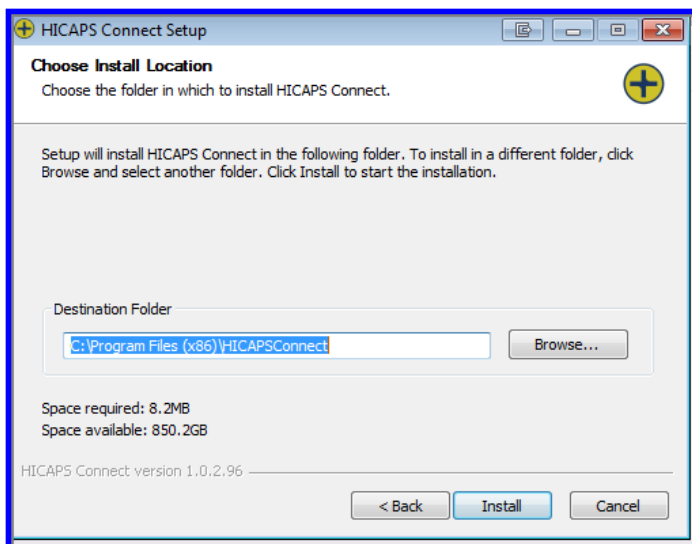
**NB:** If this is the first time you do not already have the correct HiCaps software installed on your computer you will be prompted to install it. (see below)



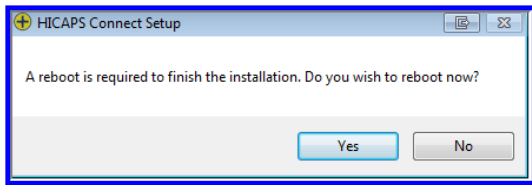
- Click YES to install HIPCAPS software.



- Click the "I Accept box"
- Click Next

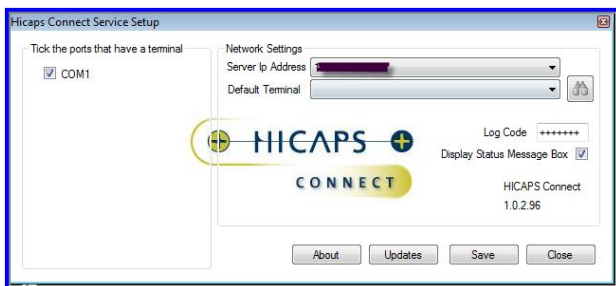


- Click Install

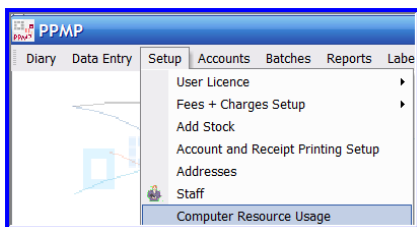


- Click Yes to reboot the computer and allow the installation to finish.
- Once the reboot is complete restart PPMP®.
- A new Hicaps Connect screen will appear leave the default settings and just click save.
- Hicaps will finish the setup and find the terminal. (As long as the terminal is connected to your computer)

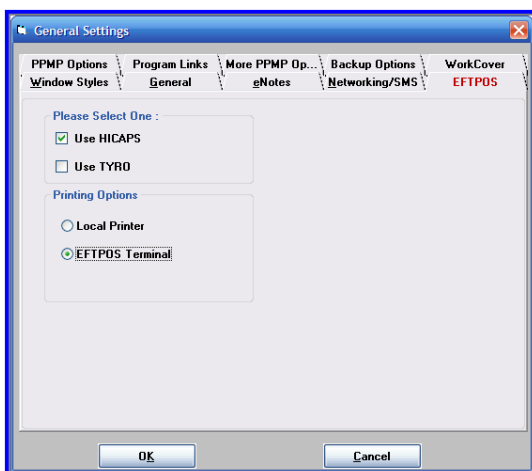
**NB:** If there is any issue at this stage with your computer and your Hicaps terminal connecting please contact Hicaps and advise them **“your computer and terminal wont connect to each other”** before turning Hicaps on in PPMP®



- Click Close after this has finished and restart PPMP® again.
- From the Main Menu of PPMP®



- Click on the Setup Menu
- Click on 'Computer Resource Usage'
- Click on the EFTPOS tab

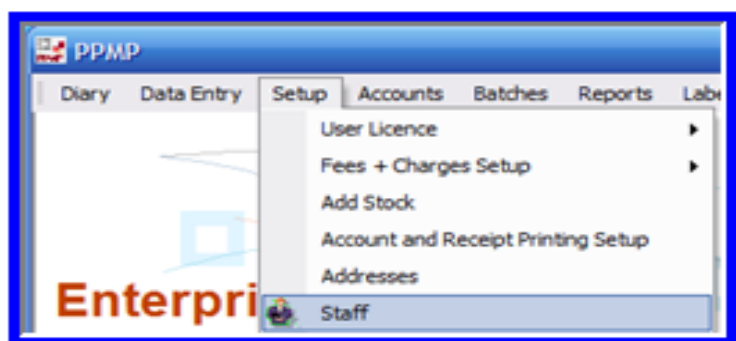


- Tick “Use HICAPS”
- Tick “EFTPOS Terminal”
- Click OK

**Restart the program for the activation to start.**

## 2.2 HICAPS staff setup

Click [HERE](#) to watch video



- Go to Setup
- Click Staff

The screenshot shows the 'Staff' setup window. At the top, there is a 'Staff List' with names: Mickey, Minnie, Donald, Daisy, Staff, and Mandy. Mickey is selected. To the right of the list are buttons for 'Up', 'Dn', 'Add new', and 'Exit'. Below the list, there are radio buttons for 'Show employed staff only' (selected) and 'Show all staff'. The main section is titled 'Details' and contains the following fields:

- Staff No.: 1
- Currently employed: ☒
- Name: Mickey Mouse
- Name to show on accounts: Mickey Mouse
- Name to show on the diary: Mickey
- Login Details:
  - Login: Mickey
  - Password: \*\*\*\*
  - User Security Level: No Restrictions
- Charge Types Used (optional):
  - For treatments: [dropdown]
  - For Other Charges: [dropdown]

Buttons for 'Save' and 'Clear Charge Type Selections' are also visible.

- Select Staff Member

The screenshot shows the 'Details' tab of the staff setup window. The 'Provider Nos' tab is selected, and the 'Appointment Types', '1st Available', and 'Tyro Payments' tabs are also visible.

- Select Provider Nos tab

- Select HICAPS Group Item Type

- Insert Provider Number

- Click Save Provider Details to ALL Payment Methods

- Click OK
- Click Save Provider Details

**View Hicaps Item Number List**

- Click View HICAPS Item Number List for a List of Item Codes

**Physiotherapy**

Prov Item#	Description	Abbreviated Desc	Fund Item#
500	Initial Consultation And Treatment	INIT CONS/TRT	T500
505	Standard Treatment	STD TREATMENT	T505
509	Long Consultation	LONG CONS	T509

- Exit

## 2.3 Using HICAPS Connect with PPMP®

## 2.4 Processing a claim

From the PPMP® Diary,

- Treatment Charge & accept payment from the patient.
- (Ensure you have setup item codes for HICAPS in the Fee's & charges Setup)

Charges

Client Name: BARNEY GUMBLE A/C No 20827

Date: 27/06/2013 Item Code: 505 Medicare Item#: Std Consultation (Item Number): Fee: 97.00 Normal Fee: 97.00 GST: 0.00 Total: 97.00

Start Time (24h): Duration hh:mm

☐ Add GST

Click For Medicare Benefit Schedule (MBS):

Standard Entries:

- Initial Consultation
- Std Consultation
- Extended Consultation
- New Injury Consultation
- Re-Assessment & Treatment

☒ Show standard entries

Type of charge: Treatment Treatment location: Home Visits Patient episode involved: general Practitioner: Dr Brenda Fees scale: Normal Payment Method Used: Private Workcover Medicare D V A INJURYNET COMCARE 3RD PARTY

Payment

Client No: 20827 Episode: general

Name: GUMBLE BARNEY

Date	Description	Amount	Unpaid	Paying	Practitioner	DVA Claimd(s)
27/06/2013	Std Consultation	97.00	97.00	97.00	Dr Brenda	
28/06/2013	Initial Consultation	115.00	115.00	115.00	Sam	

Totals: 212.00 212.00

by:

HICAPS:

Medicare:

- Double click in the "paying" field to enter the full payment amount, select the Claim HICAPS button.

Date	Description	Amount	Unpaid	Paying	Practitioner	DVA ClaimId(s)
27/06/2013	Std Consultation	97.00	97.00	97.00	Dr Brenda	
28/06/2013	Initial Consultation	115.00	115.00	115.00	Sam	

Patient Card Number

Card Number

Begin Cancel

Discount Entry by

Totals 212.00 212.00

Edit Entry

Print Account

Paying Some

Paying All

EFTPOS Payment

HICAPS

Claim HICAPS

Quote HICAPS

Cancel HICAPS Transactions

Medicare

Medicare DVA Claim

Claim Medicare

Exit

- Enter the number corresponding with the patient name & press begin.
- PPMP® will display the following message

Payment

## Processing HICAPS, please continue process on machine.

- The HICAPS terminal will prompt you to swipe the patient's card & display your computers name.
- Once the process has completed successfully, PPMP® will display & print the claim summary for you & the Patient. See examples below.

PPMP® v 2.0.1.0  
PPMP: 00000001001

PN	Service Item	Claim	Benefit	Gap
1	000	\$65.00	\$32.00	\$32.00
Service Total:		\$65.00	\$32.00	\$32.00

Claim Summary			
Provider Number	01100000	Date/Time	24/06/2013 12:25:47 PM
Merchant Number	33123456	Terminal Number	014000
Health Fund	00000000000000000000	Response Code	00 - APPROVED
Card Number	00000000000000000000	Total Claim	\$65.00
Membership Number	00000000000000000000	Total Benefit	\$32.00
BNB	00000000000000000000	Total Gap	\$32.00

**IMPORTANT DECLARATION**

I, the undersigned, being a duly qualified medical practitioner, hereby declare that the above mentioned patient is entitled to the above mentioned benefits under the relevant health insurance policy, and that the patient is not entitled to any other form of compensation or reimbursement for the above mentioned services.

I, the undersigned, being a duly qualified medical practitioner, hereby declare that the above mentioned patient is not entitled to any other form of compensation or reimbursement for the above mentioned services.

I, the undersigned, being a duly qualified medical practitioner, hereby declare that the above mentioned patient is not entitled to any other form of compensation or reimbursement for the above mentioned services.

Member Signature: \_\_\_\_\_

**HICAPS**

Fast claims... on the spot

Date Printed: 24/06/2013 Page 1 of 1

PPMP® v 2.0.1.0  
PPMP: 00000001001

PN	Service Item	Claim	Benefit	Gap
1	000	\$65.00	\$32.00	\$32.00
Service Total:		\$65.00	\$32.00	\$32.00

Claim Summary			
Provider Number	01100000	Date/Time	24/06/2013 12:25:47 PM
Merchant Number	33123456	Terminal Number	014000
Health Fund	00000000000000000000	Response Code	00 - APPROVED
Card Number	00000000000000000000	Total Claim	\$65.00
Membership Number	00000000000000000000	Total Benefit	\$32.00
BNB	00000000000000000000	Total Gap	\$32.00

Customer Account Summary	
Previous Outstanding	\$0.00
This Consultation	\$32.00
Balance Forwarding	\$32.00

**HICAPS**

Fast claims... on the spot

Date Printed: 24/06/2013 Page 1 of 1

- PPMP® will return you to the payment window, you will notice the Hicaps claim amount has already been deducted from the total amount owing, you can pay the remaining balance or exit.



**Payment**  
Barney Gumble Pat No 4 Episode General

Date	Description	Amount	Unpaid	Paying	Pract	H/C
26/05/2011	INITIAL CONSULTATION	65.00	32.50		John Smith	

by 
 32.50

**HICAPS and Medicare**

- To pay the remaining balance, select Paying All to continue.

**Payment**  
Barney Gumble Pat No 4 Episode General

**Payment Details** DEPOSIT AVAILABLE : \$0.00

Drawer	Bank/Card	Branch	Pay Type	Amount
			MFundDrect	
			Cr Crd	\$32.50
			Deposit	
			Cash	
			Cheque	

Total so far 32.50  
 Total required 32.50  
 Deposit paid in today

Receipt layout printed  

☒ Re-use the details from the last payment

- From the payment window, select the payment type & accept the transaction.
- To pay via EFTPOS Payment, enter the amount & select EFTPOS Payment.

**HICAPS EFTPOS**

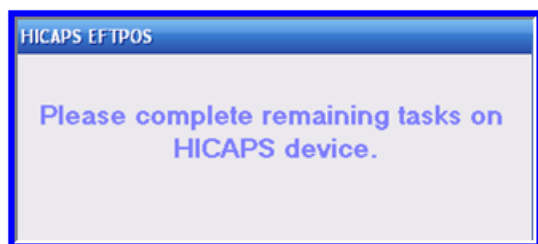
Transaction Amount

Cash Out Amount

- Enter the amount & press Start Transaction.

**Choose Merchant**

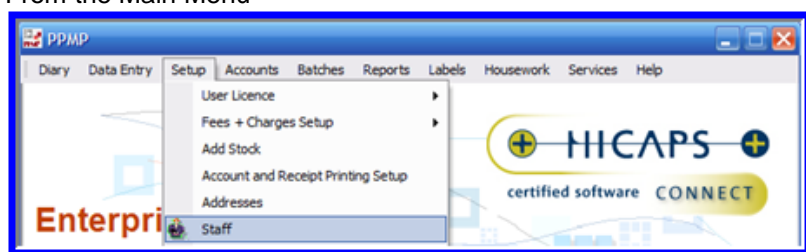
- Select your terminal & press Choose.



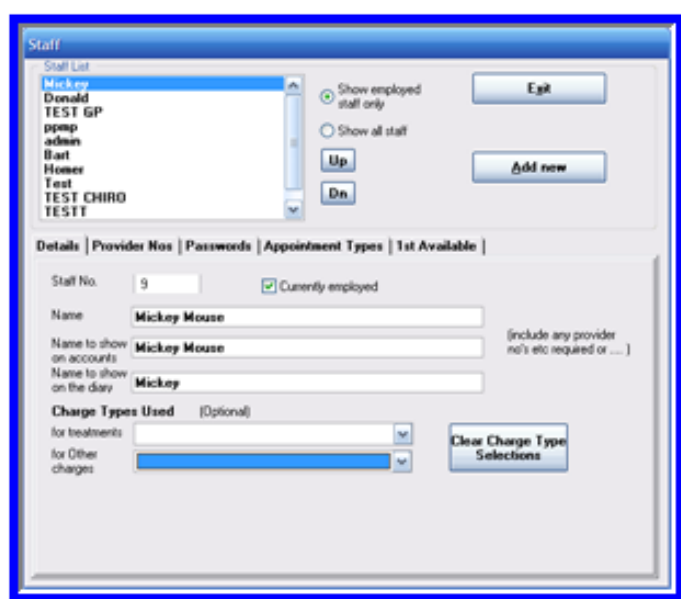
- Complete the transaction on the HICAPS terminal & PPMP® will print a receipt.

## 2.5 HICAPS - Medicare Easyclaim & staff setup

From the Main Menu



- Go to Setup
- Staff



- Select the staff member



- Click the Provider No tab.

- Select your Medicare / EFT Payment Method
- Select Hicaps Provider Group Type
- Select Service Type Code
- Enter your provider number

- Click Save Provider Details
- You must do this for **ALL** staff members

## 2.6 HICAPS - Fees & charges setup for EPC

From the Main Menu

- Go to Setup
- Fees + Charges Setup
- Change Fees + Charges

- Select the Medicare / EPC Payment Method
- Add or edit the Fees  
**NB:** Make sure the appropriate item code is entered into the Medicare/Healthpoint Code field.

## 2.7 HICAPS - Medicare/EPC Episode

## 2.8 Client setup/create a new client record or setup

From the Diary

- Go to Records
- Client Records

**Choose a Client**

Name to Find OR the Required Client No.

3 matches

Mouse Mickey	<input checked="" type="checkbox"/> Client Number
Mouse Mickey Jnr	<input type="checkbox"/> Invoice Number
Mouse Minnie	<input type="checkbox"/> Chart Number
	<input type="checkbox"/> First Name
	<input checked="" type="checkbox"/> Last Name
	<input type="checkbox"/> Addresses
	<input type="checkbox"/> Phone Numbers
	<input type="checkbox"/> Email Address
	<input type="checkbox"/> Postcode
	<input type="checkbox"/> Date of Birth

Select the client and click Ok or press Enter

Selected Client's Address

1 Burgundy Street  
 West Heidelberg  
 Vic 3000

- Search for the client name or add a new client.

**Client Details**

Exit Edit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs Appointments

**Main Details** More Details Notes (Empty) More Addresses SMS History

Title	Mr	Gender	Male	Client#	22
Salutation "Dear..."	Mr Bishop			Phone Work	
Diary Name	Bishop, Gomer			Home	
Surname	Bishop			Mobile	0402485786
First Name	Gomer			Fax	
MiddleName				D.O.B.	22/11/1971
Complete Address	PO Box 102, Ivanhoe, Melb, VIC. 3079			Date Started	05/02/2015
Email	info@ppmp.com.au			Occupation	
Comments etc				Why They Chose Us	

[ Medical Records Details ]

Chart Ref

Medicare No. 4950159871  1  1 [Help](#)

Medicare DVA use ONLY!

Suburb Ivanhoe

Postcode 3079

Pensioner No.

Safety Net

Private Health Card No.  [Help](#)

Veteran Affairs No.

Patient Verification Date :

Veteran Verification Date :

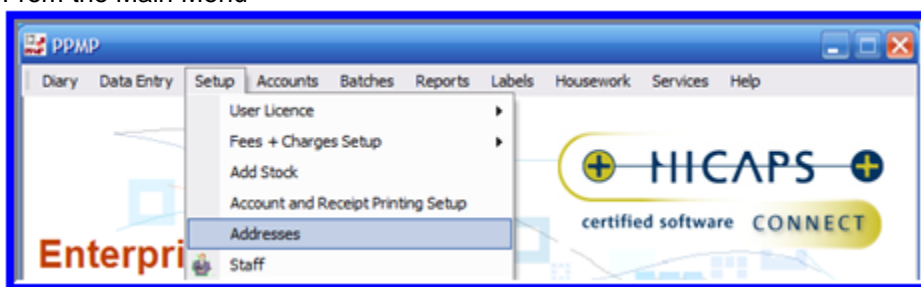
- Complete the Client Details (including with the Medicare No if known  
 If not known - it will completed automatically after you swipe the client's Medicare Card

- Fill in ALL the episode details
- Select the correct Payment Method
- Enter the referral details.

- Use the browse button to select a doctor from the list or enter the information at the time.

## 2.9 Referring doctors setup

From the Main Menu



- Go to Setup
- Addresses

- Add or Edit the address list of the doctors  
(Including Doctor's provider numbers)

## 2.10 HICAPS - Charging a client & submitting a BulkBill claim to Medicare

From the diary

- Select Client
- Click Actions
- Select Treatment Charge

- Select the charge from the entire list
- Make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner.
- If the client details have been setup correctly, all information will be pre filled.
- Press Accept and Pay

Date	Description	Amount	Unpaid	Paying	Practitioner	DVA Claim(s)
18/12/2012	Physiotherapy Consultation Item 10960	72.00	72.00	72.00	John	

- Double click in the Paying field
- Press the Claim Medicare Button.

Item Code	Description	Item Override Code	Paying	Amount
10960	Physiotherapy Consultation Item...		\$0.00	\$0.00

- Select the appropriate Claim Type, Referral Period & Referral Override from the drop down list, i.e. Bulk Bill.
- Press Claim.

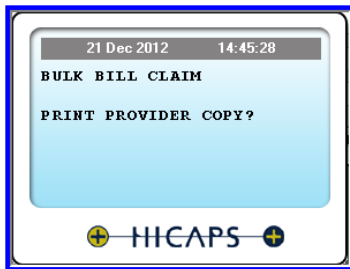
21 Dec 2012 14:43:31

Received, Waiting for  
Terminal:  
192.168.15.3

HICAPS

- Follow the prompts on the screen & terminal to process the claim.





- Follow the prompts to process & print receipts

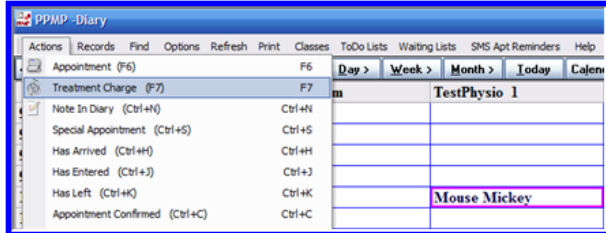
You will be advised of the outcome of the claim\*



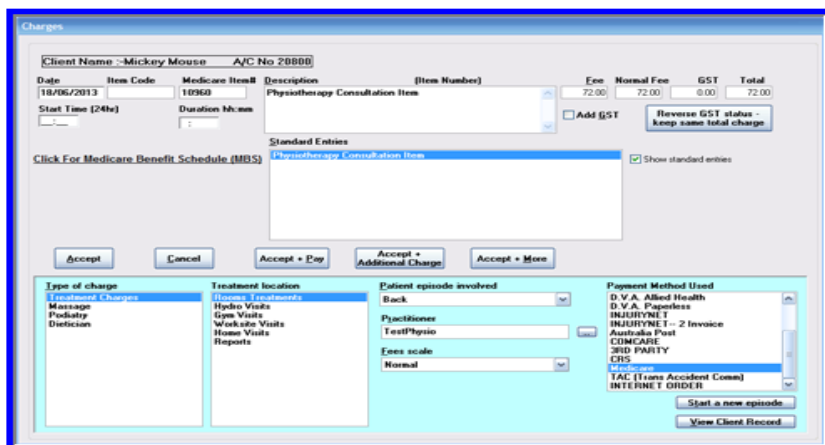
- \*for testing purposes this screen shot has been included.

## 2.11 HICAPS - Charging a client & submitting a fully, part or unpaid claim to Medicare

From the diary.



- Select the client
- Click Treatment Charge



- Select the charge from the entires list, make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner. (If the client details have been setup correctly, all information will be pre filled)
- Press Accept & Pay the transaction

- Double click in the Paying field
- Click Claim Medicare Button.

- Select the Claim Type

- Click Pay Patient Contribution (EFTPOS)
- If the Medicare Number is not filled out in the Patient Details, you are prompted to swipe/insert the card.

- Follow the prompts on the screen.

The screenshot shows the 'Medicare Claim' screen with a large green text 'Payment amount of \$72.00'. A modal window is displayed in the center with the following text: '21 Dec 2012 14:56:32', 'SMART CARD', 'PLEASE REMOVE CARD', and the HICAPS logo. The background screen shows a table with 'Item Code' 10960 and 'Amount' \$72.00. At the bottom, there are buttons for 'Claim', 'Pay Patient Contribution (EFTPOS)', and 'Cancel'.

- Follow the prompts on the screen.

The screenshot shows the 'Medicare Claim' screen with a large green text 'Payment amount of \$72.00'. A modal window titled 'Patient Card Number' is displayed in the center, containing a 'Card Number' input field and 'Begin' and 'Cancel' buttons. The background screen shows a table with 'Item Code' 10960, 'Description' Physiothe, and 'Amount' \$72.00. At the bottom, there are buttons for 'Claim', 'Pay Patient Contribution (EFTPOS)', and 'Cancel'.

- If the Medicare Number is not filled out in the Patient Details screen, you will be prompted to swipe the card.

The screenshot shows the 'Medicare Claim' window with a title bar. The main heading is 'Payment amount of \$72.00'. Below this, there are fields for 'Referral P' and 'Referral Over'. A table with two columns, 'Item Code' and 'Description', shows '10960 Physiott'. To the right, a table with two columns, 'Billing' and 'Amount', shows '\$72.00' and '\$72.00'. A modal window is centered on the screen with a title bar showing '21 Dec 2012' and '14:57:05'. The modal text reads 'COMMS' and 'DIALING NOW'. At the bottom of the modal is the HICAPS logo. At the bottom of the main window are three buttons: 'Claim', 'Pay Patient Contribution (EFTPOS)', and 'Cancel'.

- Follow the prompts to complete the transaction

The screenshot shows the 'Medicare Claim' window with a title bar. The main heading is 'Payment amount of \$72.00'. Below this, there are fields for 'Referral P' and 'Referral Over'. A table with two columns, 'Item Code' and 'Description', shows '10960 Physiott'. To the right, a table with two columns, 'Billing' and 'Amount', shows '\$72.00' and '\$72.00'. A modal window is centered on the screen with a title bar showing '21 Dec 2012' and '14:57:18'. The modal text reads 'FULLY PAID CLAIM', 'Claim Declined', '9718', and 'Refer To Receipt'. At the bottom of the modal is the HICAPS logo. At the bottom of the main window are three buttons: 'Claim', 'Pay Patient Contribution (EFTPOS)', and 'Cancel'.

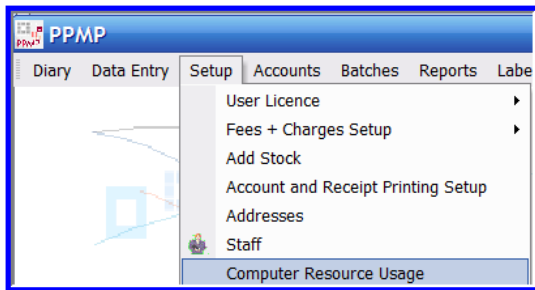
- Once the claim has been processed you will be advised of the outcome of the claim  
\*\*for testing purposed this screen shot has been included.

### 3 [TYRO](#)

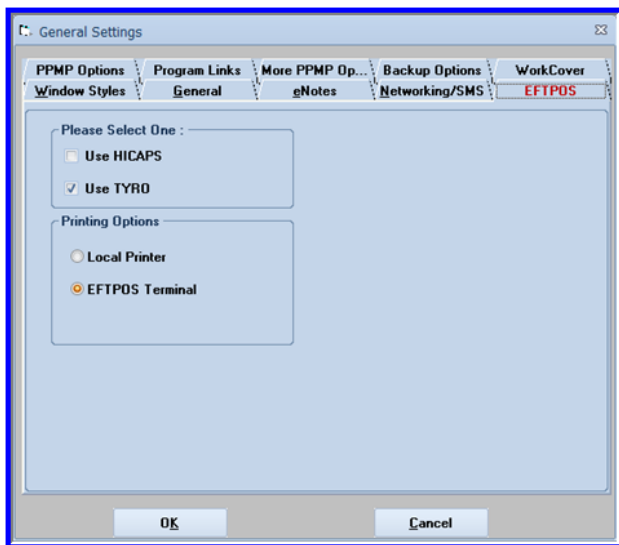
#### 3.1 [TYRO installation & activation](#)

Click [HERE](#) to watch video

NB: If you are using the TYRO Integration you will need to Activate Tyro first.  
From the Main Menu of PPMP®



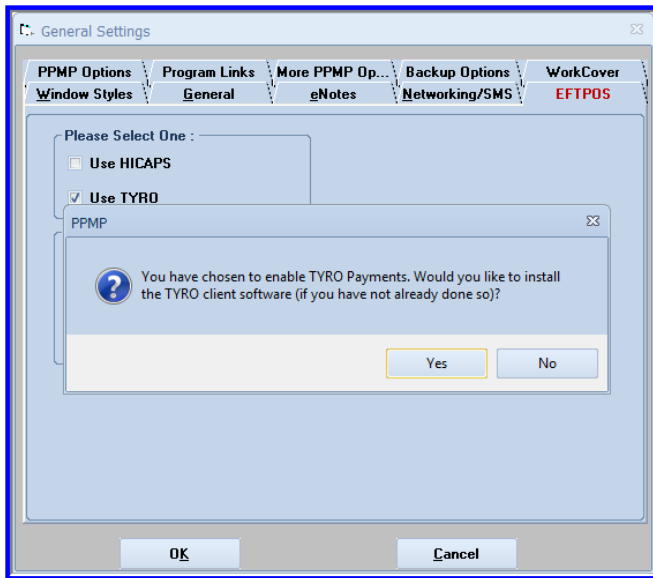
- Click on the Setup Menu
- Click on 'Computer Resource Usage'
- Click on the EFTPOS tab



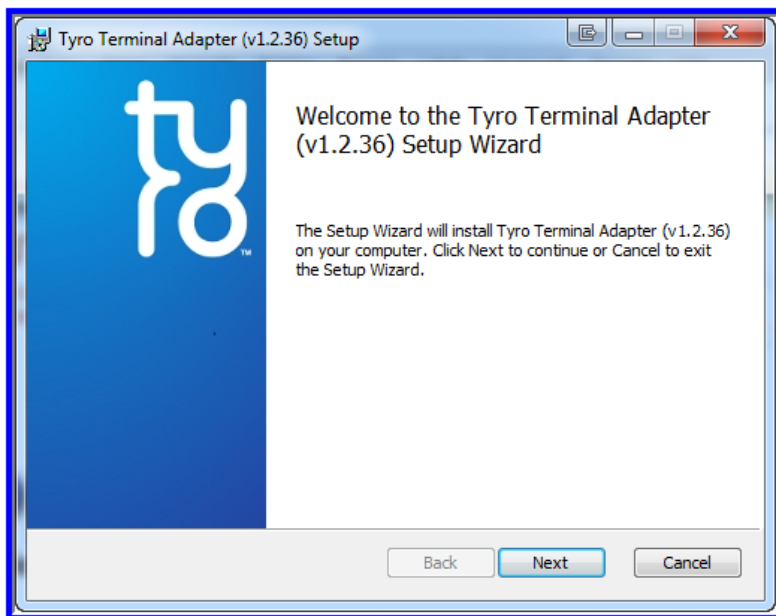
- Tick "Use TYRO"
- Tick "EFTPOS Terminal" – (for Printing direct to the terminal)
- Click OK

**Restart the program for the activation to start.**

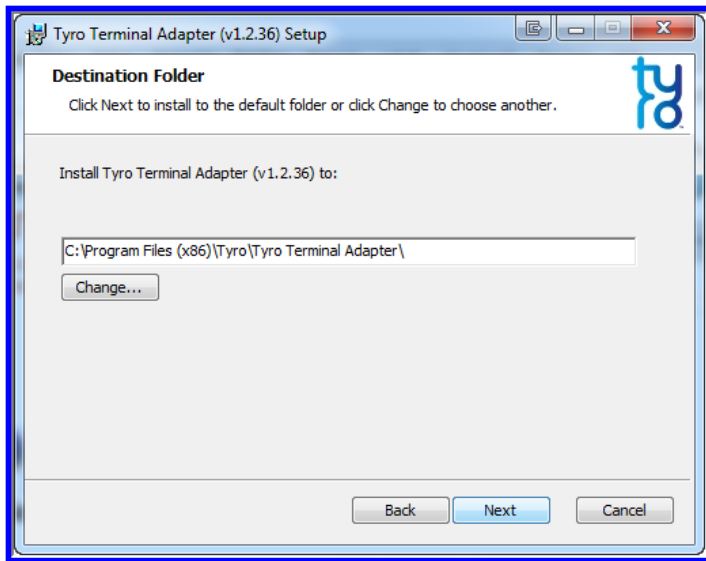
**NB:** If this is the first time you do not already have the correct Tyro software installed on your computer you will be prompted to install it. (see below)



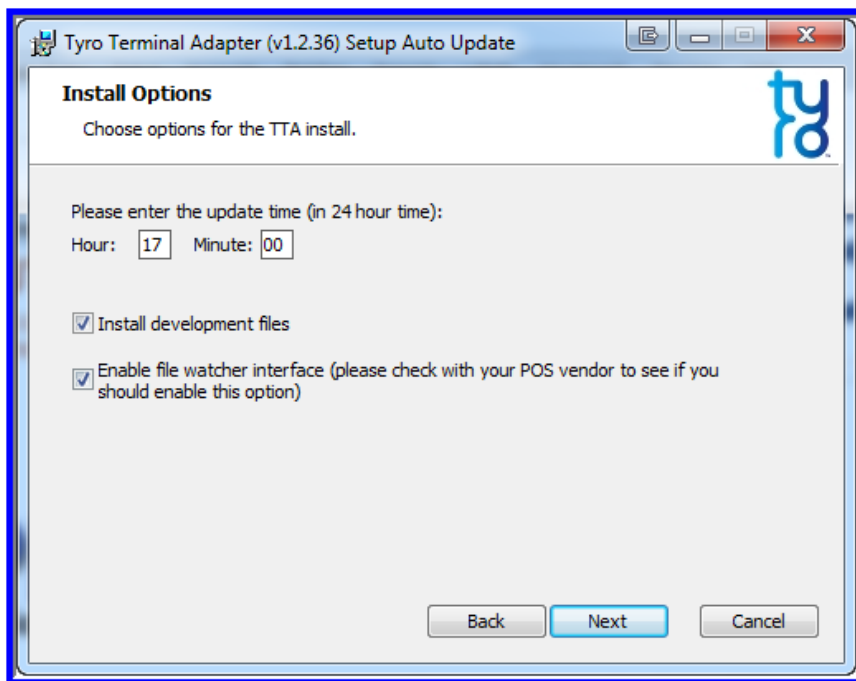
- Click YES to install TYRO software.



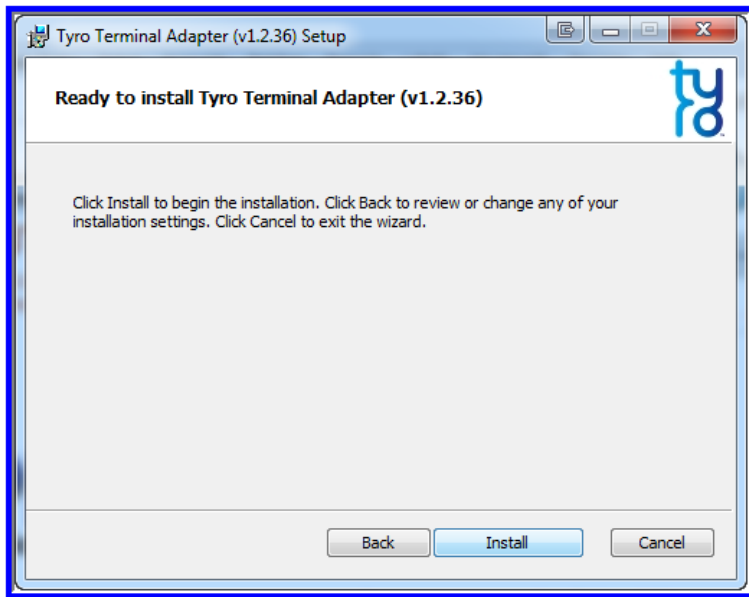
- Click Next



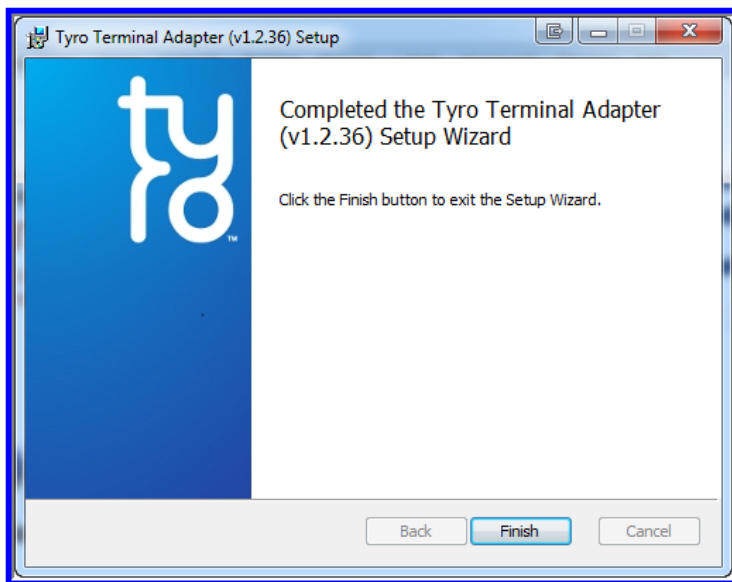
- Click Next



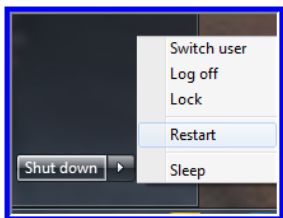
- Select an Auto Update time (this is for TYRO software only)
- Click Next



- Click Install

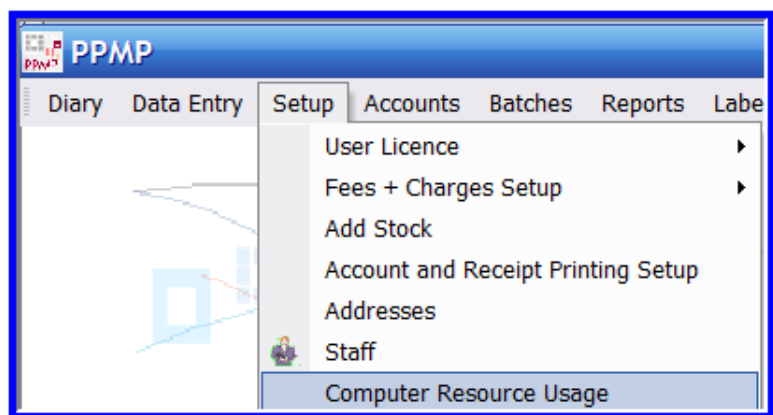


- Click Finish

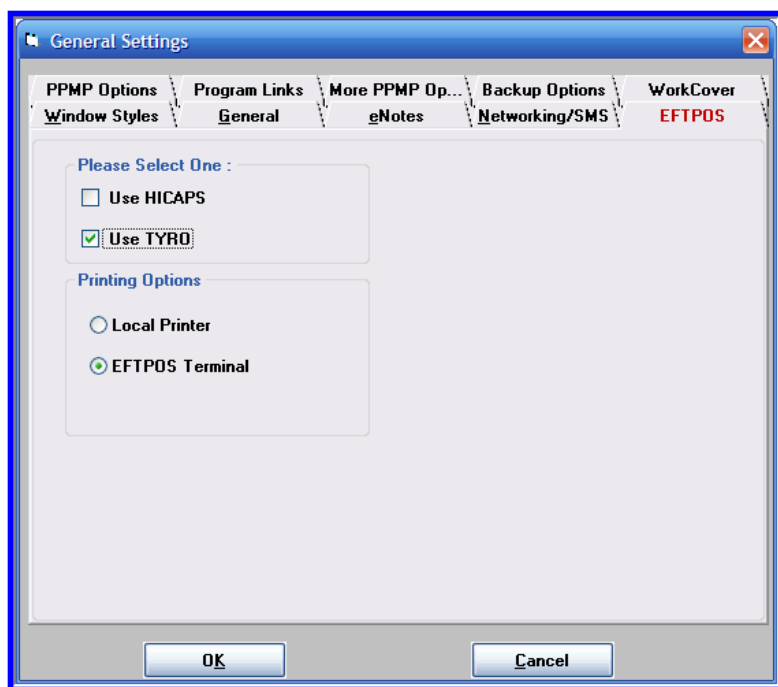


- Once the reboot is complete restart PPMP®.





- From the Main Menu of PPMP®
- Click on the Setup Menu
- Click on 'Computer Resource Usage'



- Click on the EFTPOS tab
- Click OK
- Tick "Use TYRO"
- Tick "EPFTPOS Terminal"
- Click OK

**Restart the program for the activation to start.**

### 3.2 Using TYRO with PPMP®

Click [HERE](#) to watch video

### 3.3 Processing a claim

- From the PPMP® Diary, Treatment Charge & accept payment from the patient.
- (Ensure you have setup item codes for TYRO in the Fee's & charges Setup)

Charges

Client Name :-Elephant, Dumbo A/C No 10

Date: 10/02/2015 Item Code: 505 Medicare Item#: Description: Standard Consultation Fee: 90.00 Normal Fee: 90.00 GST: 0.00 Total: 90.00

Start Time (24hr): 00:00 Duration hh:mm: 00:00

Click For Medicare Benefit Schedule (MBS)

Standard Entries: Initial Consultation, Standard Consultation

Buttons: Accept, Cancel, Accept + Additional Charge, Accept + More

Payment Method Used: Private, Vet Affairs, Workcover, EPC - Medicare, Pilates

Buttons: Start a New Episode, View Client Record

Payment

Client No. 12 Episode: General

Name: Hibbert, Dr Julius

Date	Description	Amount	Unpaid	Paying	Practitioner	DVA Claimd(s)
10/02/2015	Standard Consultation (11:00AM)	60.00	60.00	60.00	Donald	

Discount Entry by: 0.00 Totals: 60.00 60.00

Buttons: Edit Entry, Paying Some, Tyro Healthpoint, Tyro EasyClaim, Print Account, Paying All, Tyro Healthpoint Cancellation, Calculate Gap Payment, Medicare DVA Claim, Tyro EFTPOS, Exit

- Double click in the "paying" field to enter the full payment amount, select the Tyro Healthpoint button.

Payment

Client No. 12 Episode General

Name Hibbert, Dr Julius :

Date	Description	Amount	Unpaid	Paying Practitioner	DVA ClaimId(s)
10/02/2015	Standard Consultation (11:00AM)	60.00	60.00	60.00 Donald	

Patient Card Number

Card Number

Begin Exit

Discount Entry by 0.00 Totals 60.00 60.00

Edit Entry

Paying Some

Print Account

Paying All

Medicare DVA Claim

Tyro

Tyro Healthpoint

Tyro Healthpoint Cancellation

Tyro EFTPOS

Tyro EasyClaim

Calculate Gap Payment

Exit

- Enter the number corresponding with the patient name & press begin.
- PPMP® will display the following message

# Healthpoint



Processing claim - please wait

Swipe health fund card

Healthpoint request started

Cancel Transaction

- The Tyro terminal will prompt you to swipe the patient's card.

Healthpoint

tyro

Claim assessed. Gap \$101.00

ACCEPT (1)

REJECT (2)

Processing claim - please wait  
Swipe health fund card  
Healthpoint request started

Cancel Transaction

- Click accept to accept and process the health insurance claim.

Payment

Client No. 12

Episode General

Name Hibbert, Dr Julius :

Date	Description	Amount	Unpaid	Paying	Practitioner	DVA ClaimId(s)
10/02/2015	Standard Consultation	201.00	101.00		Donald	

TYRO

TYRO claim complete.

OK

Discount Entry by

Totals 101.00 201.00

Edit Entry
Paying Some
Print Account
Paying All
Medicare DVA Claim

Tyro

Tyro Healthpoint
Tyro EasyClaim
Tyro Healthpoint Cancellation
Calculate Gap Payment
Tyro EFTPOS

Exit

- Once the process has completed successfully PPMP® will return you to the payment window, you will notice the Tyro claim amount has already been deducted from the total amount owing, you can pay the remaining balance or exit.

Payment

Client No. 12 Episode General

Name Hibbert, Dr Julius :

Date	Description	Amount	Unpaid	Paying Practitioner	DVA ClaimId(s)
10/02/2015	Standard Consultation	201.00	101.00	101.00 Donald	

Discount Entry by 0.00 Totals 101.00 101.00

Buttons: Edit Entry, Paying Some, Tyro Healthpoint, Tyro EasyClaim, Print Account, Paying All, Tyro Healthpoint Cancellation, Calculate Gap Payment, Medicare DVA Claim, Tyro EFTPOS, Exit

- To pay via EFTPOS Payment, enter the amount & select Tyro EFTPOS.

EFTPOS

Transaction Amount 101.00

Cash Out Amount

Buttons: Start Transaction, Exit

- Check the amount entered and click start Transaction.

**Purchase**

Amount \$101.00

Cashout \$0.00

Total \$101.00

tyro

Swipe / Insert Card. Purchase \$101.00

Purchase started - Amount: \$101.00, Cashout: \$0.00

Cancel Transaction

- The Tyro terminal will prompt you to swipe the patient's card.

**Purchase**

Amount \$101.00  
Cashout \$0.00  
Total \$101.00

**APPROVED. Print customer copy?**

YES (1) NO (2)

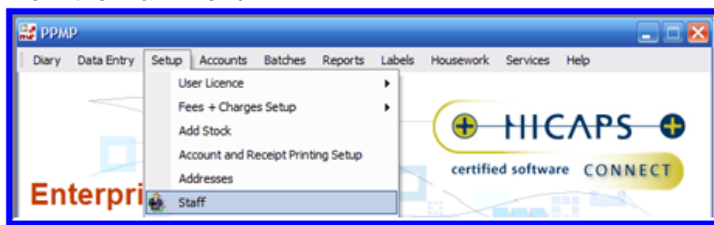
Processing transaction - please wait  
Enter PIN  
Select account  
Swipe / Insert Card. Purchase \$101.00  
Purchase started - Amount: \$101.00, Cashout: \$0.00

Cancel Transaction

- Complete the transaction on the Tyro terminal & click yes to print a customer copy.

### 3.4 TYRO - Medicare EasyClaim & staff setup

From the Main Menu



- Go to Setup
- Staff

**Staff**

Staff List

- Mickey
- Donald
- Minnie
- Daisy
- Mandy
- Staff
- Donald Duck

☒ Show employed staff only  
☐ Show all staff

Up Down

Add new

Exit

**Details** | Provider Nos | Appointment Types | 1st Available | Tyro Payments

Staff No. 1 ☒ Currently employed

Name Mickey Mouse

Name to show on accounts Mickey Mouse

Name to show on the diary Mickey

Login Details:

Login Mickey

Password \*\*\*\*

User Security Level No Restrictions

Charge Types Used (optional):

For treatments

For Other Charges

Clear Charge Type Selections

Save

- Select the staff member

Details | **Provider Nos** | Appointment Types | 1st Available

- Click the Provider No tab.

**Staff**

Staff List

- Mickey
- Donald**
- Minnie
- Daisy
- Mandy
- Staff
- Donald Duck

☒ Show employed staff only  
☐ Show all staff

Up Dn

Exit Add new

---

Details | Provider Nos | Appointment Types | 1st Available | Tyro Payments

Treatment Location  
 Rooms

Payment Method  
**EPC - Medicare**

Provider No : 2147661H

Hicaps  
 Provider Group Type: Physiotherapy  
 Service Type Code: G - General Practitioner

Tyro  
 Service Type Code: S - Specialist

Medicare Online :  
 Claim Type : DVA Allied Health  
 Claim Service Type : J - DVA Allied

Address

Save Provider No Details  
 Save Provider No Details To All Payment Methods

View Hicaps Item Number List

- Select your Medicare / EFT Payment Method
- Select the Service Type Code for TYRO
- Enter your provider number

**Save Provider No Details  
 To All Payment Methods**

- Click Save Provider Details
- You must do this for **ALL** staff members

### 3.5 TYRO - Fees & charges Setup for EPC

From the Main Menu

PPMP

Diary Data Entry Setup Accounts Batches Reports Labels Housework Services Help

User Licence

**Fees + Charges Setup**

Add Stock

Change the Standard Fees + Charges

Item Number Fees Lists

- Go to Setup
- Fees + Charges Setup
- Change Fees + Charges

- Select the Medicare / EPC Payment Method
- Add or edit the Fees  
**NB:** Make sure the appropriate item code is entered into the Medicare/Healthpoint Code field.

### 3.6 TYRO - Medicare/EPC episode

### 3.7 Client setup/create a new client record or setup

From the Diary

- Go to Records
- Client Records

- Search for the client name or add a new client.



- Complete the Client Details (including with the Medicare No if known  
If not known - it will completed automatically after you swipe  
the client's Medicare Card

- Fill in ALL the episode details
- Select the correct Payment Method
- Enter the referral details.

- Use the browse button to select a doctor from the list or Enter the information at the time.

### 3.8 Referring doctors setup

From the Main Menu

- Go to Setup
- Addresses

- Add or Edit the address list of the doctors (Including Doctor's provider numbers)

### 3.9 TYRO (Bulk Billing) - Charging a client & submitting a BulkBill claim to Medicare

From the diary

The screenshot shows the 'PPMP - Diary' window. On the left, the 'Actions' menu is open, listing options like 'Appointment (F6)', 'Treatment Charge (F7)', 'Note In Diary (Ctrl+N)', 'Special Appointment (Ctrl+S)', 'Has Arrived (Ctrl+H)', 'Has Entered (Ctrl+J)', 'Has Left (Ctrl+K)', and 'Appointment Confirmed (Ctrl+C)'. The 'Treatment Charge (F7)' option is highlighted. On the right, a calendar view is shown for the month of May. The date '1' is selected, and the name 'TestPhysio 1' is entered in the corresponding cell. Below the calendar, the name 'Mouse Mickey' is entered in a text field.

- Select Client
- Click Actions
- Select Treatment Charge

The screenshot shows the 'Charges' window. At the top, the 'Client Name' is 'Mickey Mouse' and the 'A/C No' is '20888'. Below this, there are fields for 'Date' (18/06/2013), 'Item Code' (10960), 'Medicare Item#', 'Description' (Physiotherapy Consultation Item), 'Fee' (72.00), 'Normal Fee' (72.00), 'GST' (0.00), and 'Total' (72.00). There are also fields for 'Start Time (24hr)' and 'Duration H:mm'. A checkbox for 'Add GST' is present, along with a button for 'Reverse GST status - keep same total charge'. Below these fields, there is a section for 'Standard Entries' with a list of 'Physiotherapy Consultation Item' and a checkbox for 'Show standard entries'. At the bottom, there are buttons for 'Accept', 'Cancel', 'Accept + Pay', 'Accept + Additional Charge', and 'Accept + More'. On the right side, there are dropdown menus for 'Type of charge' (Treatment Charges), 'Treatment location' (Home Treatments), 'Patient episode involved' (Back), 'Practitioner' (TestPhysio), 'Fees scale' (Normal), and 'Payment Method Used' (D.V.A. Allied Health, D.V.A. Paperless, INJURYNET, INJURYNET - 2 Invoice, Australia Post, COMCARE, 3RD PARTY, CRS, TAL (Trans Accident Comm), INTERNET ORDER). There are also buttons for 'Start a new episode' and 'View Client Record'.

- Select the charge from the entire list
- Make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner.
- If the client details have been setup correctly, all information will be pre filled.
- Press Accept and Pay

Payment

Client No. 22 Episode EPC

Name Bishop, Gomer :EPC

Date	Description	Amount	Unpaid	Paying Practitioner	DVA ClaimId(s)
18/02/2015	EPC Consultation	37.05	37.05	37.05 Donald	

Discount Entry by

Totals 37.05 37.05

Buttons: Edit Entry, Paying Some, Tyro Healthpoint, Tyro EasyClaim, Print Account, Paying All, Tyro Healthpoint Cancellation, Calculate Gap Payment, Medicare DVA Claim, Tyro EFTPOS, Exit

- Double click in the Paying field
- Press the Tyro EasyClaim Button.

Medicare Claim

Payment amount of \$37.05

Claim Type: Fully Paid

Referral Override Code: Fully Paid

Referral Period Code: Bulk Bill

Item Code	Description	Item Override Code	Amount
23	EPC Consultation		\$37.05

Buttons: Claim, Pay Patient Contribution (EFTPOS), Go Back

- Select the appropriate Claim Type, Referral Period & Referral Override from the drop down list, i.e. Bulk Bill.

Buttons: Claim, Pay Patient Contribution (EFTPOS), Go Back

- Click Claim.

# Medicare Easyclaim



**Do you accept the claim for \$37.05**

YES (1)

NO (2)


?

Processing claim - please wait  
Medicare Easyclaim request started

Cancel Transaction

- Follow the prompts on the screen & terminal to process the claim.

# Medicare Easyclaim



**CLAIM SUBMITTED. Print practitioner copy?**

YES (1)

NO (2)

?

Do you assign your right to benefit?  
Answer accepted  
Do you accept the claim for \$37.05  
Processing claim - please wait  
Medicare Easyclaim request started

Cancel Transaction

- Follow the prompts to process & print receipts

### 3.10 TYRO (Fully Paid)- Charging a client & submitting a fully, part or unpaid claim to Medicare

From the diary.

The screenshot shows the 'PPMP - Diary' window. On the left is a list of actions with their respective keyboard shortcuts: Appointment (F6), Treatment Charge (F7), Note In Diary (Ctrl+N), Special Appointment (Ctrl+S), Has Arrived (Ctrl+H), Has Entered (Ctrl+J), Has Left (Ctrl+K), and Appointment Confirmed (Ctrl+C). The main area displays a calendar view for the month of June. A specific appointment for 'TestPhysio 1' is visible, and the client's name 'Mouse Mickey' is highlighted in the bottom right corner of the appointment grid.

- Select the client
- Click Treatment Charge

The screenshot shows the 'Charges' window for client 'Mickey Mouse' (A/C No 208800). It displays a table with columns for Date, Item Code, Medicare Item#, Description, (Item Number), Fee, Normal Fee, GST, and Total. A single entry is shown for '18/06/2013' with Item Code '10960' and Description 'Physiotherapy Consultation Item'. Below the table, there are sections for 'Standard Entries' (showing 'Physiotherapy Consultation Item'), 'Click For Medicare Benefit Schedule (MBS)', and various buttons like 'Accept', 'Cancel', 'Accept + Pay', 'Accept + Additional Charge', and 'Accept + More'. On the right, there are dropdown menus for 'Patient episode involved' (set to 'Back'), 'Practitioner' (set to 'TestPhysio'), and 'Payment Method Used' (set to 'D.V.A. Allied Health').

- Select the charge from the entires list, make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner. (If the client details have been setup correctly, all information will be pre filled)
- Press Accept & Pay the transaction

The screenshot shows the 'Payment' window for client 'Pig Peter' (Client No: 20897). It displays a table with columns for Date, Description, Amount, Unpaid, Paying Practitioner, and DVA Claim(s). A single entry is shown for '18/12/2012' with Description 'Physiotherapy Consultation Item 10960', Amount '72.00', and Unpaid '72.00'. Below the table, there are buttons for 'Discount Entry', 'Edit Entry', 'Paying Some', 'Print Account', 'Paying All', 'Claim RECAPS', 'Cancel RECAPS Transactions', 'Medicare DVA Claim', 'Claim Medicare' (highlighted with a red arrow), and 'Exit'. The 'Totals' section shows '72.00' for both Amount and Unpaid.

- Double click in the Paying field
- Click Claim Medicare Button.

**Medicare Claim**

**Payment amount of \$72.00**

Claim Type:

Referral Period Code:

Referral Override Code:

Item Code	Description	Item Override Code	Paying	Amount
10960	Physiotherapy Consultation Item...		\$72.00	\$72.00

- Select the Claim Type

- Click Pay Patient Contribution (EFTPOS)
- If the Medicare Number is not filled out in the Patient Details, you are prompted to swipe/insert the card.

**Medicare Claim**

**Payment amount of \$72.00**

Referral Period Code:

Referral Override Code:

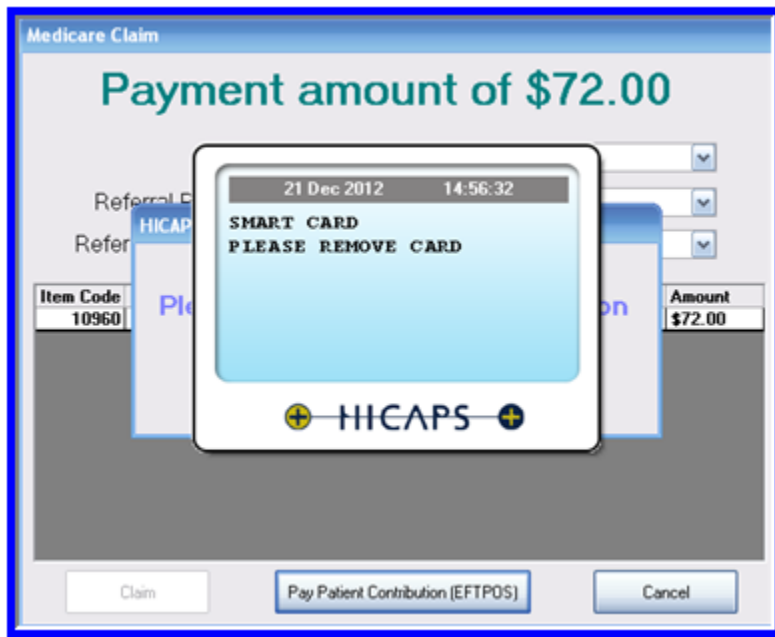
Item Code	Description	Item Override Code	Paying	Amount
10960	Physiotherapy Consultation Item...		\$72.00	\$72.00

21 Dec 2012 14:55:41

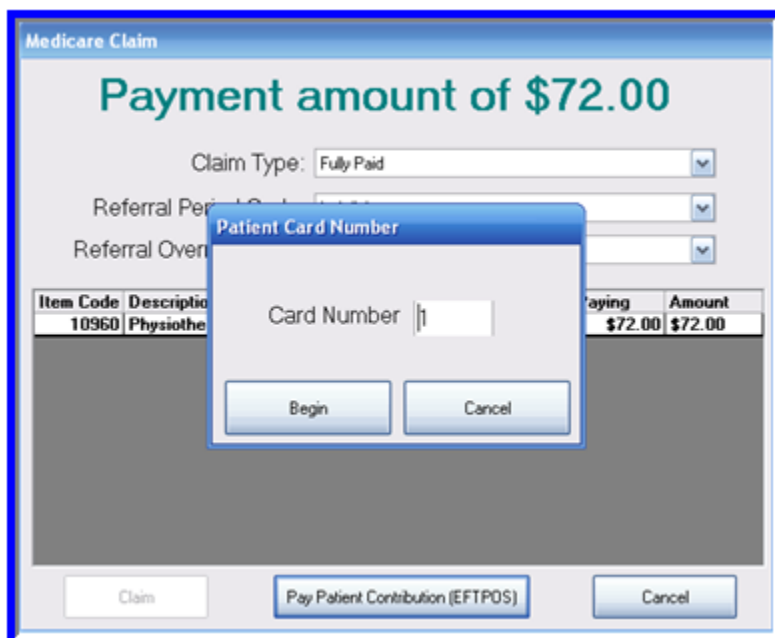
Received, Waiting for  
Terminal:  
192.168.15.3

HICAPS

- Follow the prompts on the screen.



- Follow the prompts on the screen.



- If the Medicare Number is not filled out in the Patient Details screen, you will be prompted to swipe the card.



The screenshot shows the 'Medicare Claim' window with a title bar. The main heading is 'Payment amount of \$72.00'. Below this, there are fields for 'Referral P' and 'Referral Over'. A table with two columns, 'Item Code' and 'Description', shows '10960 Physiott'. To the right, a table with two columns, 'ying' and 'Amount', shows '\$72.00' and '\$72.00'. A modal window is centered on the screen with a title bar showing '21 Dec 2012' and '14:57:05'. The modal text reads 'COMMS' and 'DIALING NOW'. At the bottom of the modal is the HICAPS logo. At the bottom of the main window are three buttons: 'Claim', 'Pay Patient Contribution (EFTPOS)', and 'Cancel'.

- Follow the prompts to complete the transaction

The screenshot shows the 'Medicare Claim' window with a title bar. The main heading is 'Payment amount of \$72.00'. Below this, there are fields for 'Referral P' and 'Referral Over'. A table with two columns, 'Item Code' and 'Description', shows '10960 Physiott'. To the right, a table with two columns, 'ying' and 'Amount', shows '\$72.00' and '\$72.00'. A modal window is centered on the screen with a title bar showing '21 Dec 2012' and '14:57:18'. The modal text reads 'FULLY PAID CLAIM', 'Claim Declined', '9718', and 'Refer To Receipt'. At the bottom of the modal is the HICAPS logo. At the bottom of the main window are three buttons: 'Claim', 'Pay Patient Contribution (EFTPOS)', and 'Cancel'.

- Once the claim has been processed you will be advised of the outcome of the claim  
\*\*for testing purposed this screen shot has been included.

#### 4 [WorkCover Queensland - Version 9 and above of PPMP®](#)

##### 4.1 [Step 1 - Register with Queensland WorkCover](#)

- It is a simple set up process—just send an email to [providers.providers@workcoverqld.com.au](mailto:providers.providers@workcoverqld.com.au) (include reference to 'B2B' in the subject line) to obtain a B2B username/password which you will need add into PPMP® (step 3).
- Once you receive the information, please enter it in the PPMP® setup or contact PPMP® to arrange a setup time & training.

##### 4.2 [Step 2 – Enter registration details into PPMP®](#)

On the Main Screen of PPMP®

- Select Setup
- Select Computer Resource Usage
- Select the WorkCover tab to enter the appropriate information.

The screenshot shows the 'General Settings' dialog box with the 'WorkCover' tab selected. The 'State/Territory' dropdown menu is open, showing a list of Australian states and territories with 'QLD' highlighted. Below this, the 'Policy Number' field contains 'P9900000003'. The 'URL' field contains 'https://acols.workcoverqld.com.au/ols/api/providerInvoiceUpload'. The 'API Client Key' field contains '2b692645-71c6-4b32-b0e4-40af04991b6a'. The 'UserName' field contains 'B2B\_P9900000003'. The 'Password' field is masked with asterisks. At the bottom of the dialog are buttons for 'Save', 'Test API Connectivity', 'OK', and 'Cancel'.

**State/Territory:** QLD

**Policy Number:** WorkCover Queensland Supplied

**URL:** PPMP® Supplied

**API Client Key:** PPMP® Supplied

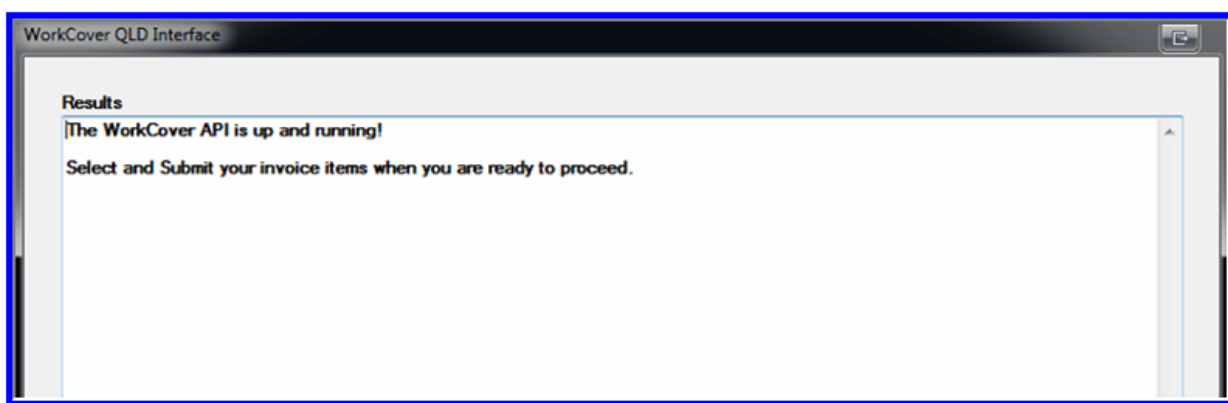
**User Name:** WorkCover Queensland Supplied

**Password:** WorkCover Queensland Supplied

- Save the configuration & then press Test API Connectivity



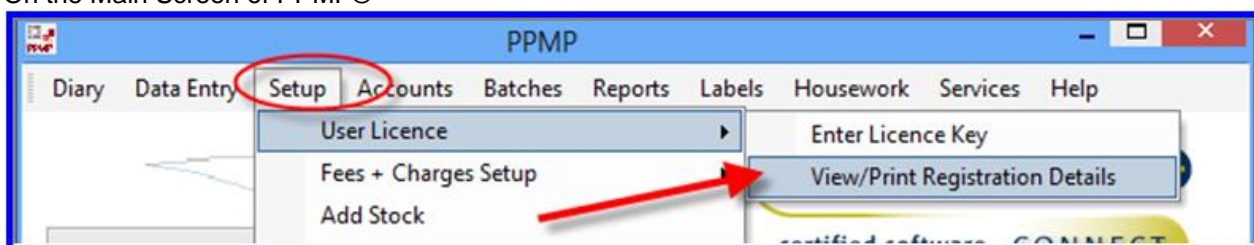
- Please wait while the system initiates a test.



- The follow screen is displayed if successful. Press ok
- If you plan to lodge on more than one terminal, please repeat Step 2 only & install all three certificates.
- If you experience an error, please contact PPMP® Support for assistance.

### 4.3 Step 3 - Practice registration details

On the Main Screen of PPMP®



- Click Setup
- Select User License
- Select View/Print Registration Details.
- Complete the registration, including Business Name & ABN *See below*

- Click Save

#### 4.4 Step 4 - Fees & charges setup

NB: Item Codes - <https://www.worksafe.qld.gov.au/service-providers/allied-health-fees>  
On the Main Screen of PPMP®

- Click Setup
- Fees & Charges Setup
- Change the Standard Fees & Charges

- Go to your Workcover Payment method and ensure the **Item Code** is entered for each individual charge
- Do the same for treatment locations and any other areas you have Workcover charges entered
- Click Save

#### 4.5 Step 5 - Client record setup / Episode setup

- Open the Client record

Episodes for Homer Simpson,

Exit A/C Info Attendance Notes Printout

Episode Details Notes Alarms - To Do List Discharge Addresses EDI Documents

Episode Title: Back

Treatment Location: Rooms

Payment Method: Workcover

Fee Scale: Normal

Initial Fee: 0.00 (Leave \$0.00 unless you want to override the standard fees)

Usual Fee: 0.00

Send A/C's To: Episode Other Addr's (4)

Accident Date: / /

Claim/File Reference No's: 1 123456789y, 2

Presenting Problem(s): Back

Referred By: Dr. Scott Phillips

Prov No: 123456MM Phone: 1300784908

Fax: 1300784906

Address: Po Box 102, Ivanhoe, Melb, VIC. 3079

Ref Date: / / Expires: / /

Referred To: The practice

Usual Therapist: Mickey

Date Started: 25/07/2013 (Filled in automatically after first treatment)

Canx appointments: 0

Episode List (Titles): Back, (L) Leg, Pilates, EPC

New Episode Delete Selected

- Fill in the episode details
- Change the Send A/C's to **Episode Other Addr's (4)**
- Enter the claim number in Claim/File Reference No's 1

Episodes for Homer Simpson,

Exit A/C Info Attendance Notes Printout

Episode Details Notes Alarms - To Do List Discharge Addresses EDI Documents

TAC

☒ N/A ☐ TAC

TAC Client Details

Address 1: , Address 2: , Suburb/Town: , PostCode: , Service Location: R Rooms

Clear Charges for ReTransmission

WorkCover

Type: WorkCover QLD

Claim #: 123456789y

- Click the EDI Tab
- For **Type** Select WorkCover QLD
- Enter the Claim number
- Click exit
- Save the changes

#### 4.6 Billing a patient

Click [HERE](#) to watch videook

PPMP - Diary

oDo Lists Waiting Lists SMS Apt Reminders Switch Diary View Help

Week > Month > Today Calendar

Minnie Donald (10) Mandy

\$-Simpson, Homer :

pilates for backs [4]

Elephant, Dumbo :

Appointment (F6)  
Treatment Charge (F7)  
Note In Diary (Ctrl+N)  
Special Appointment (Ctrl+S)  
Has Arrived (Ctrl+H)  
Has Entered (Ctrl+J)

- Select the Client on the Diary
- Click Actions
- Select Treatment charge

Charges

Client Name :-Homer Simpson, A/C No 4

Date: 10/02/2015 Item Code: 10006 Medicare / Healthpoint#

Description: Standard Consultation (8:00AM)

Fee: 71.00 Normal Fee: 71.00 GST: 0.00 Total: 71.00

Start Time (24hr): Duration hh:mm

Click For Medicare Benefit Schedule (MBS)

Standard Entries

Initial Consultation  
Standard Consultation

Accept Cancel Accept + Pay Accept + Additional Charge Accept + More

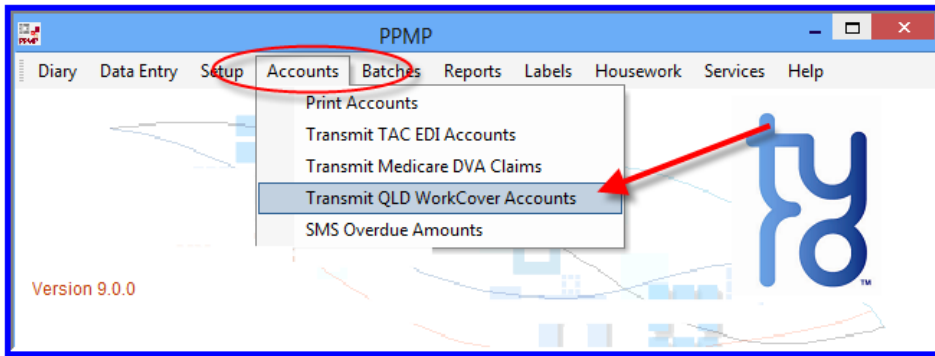
Type of charge: Treatments Treatment location: Rooms, Hospital, Home Visits Patient episode involved: Back Practitioner: Donald Fees scale: Normal Payment Method Used: Private, Vet Affairs, Workover, EPC Medicare, Pilate

Start a New Episode

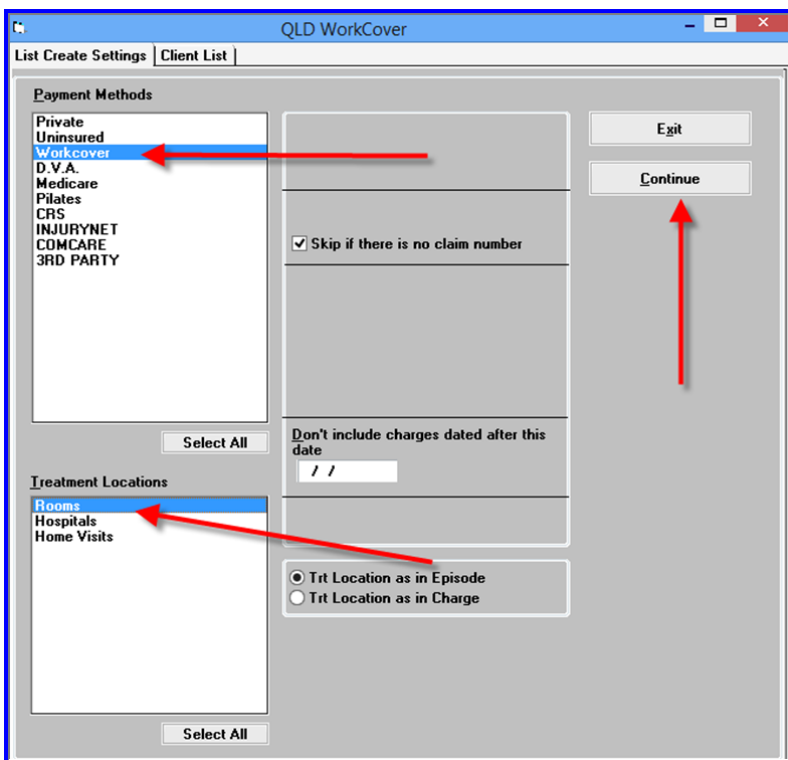
- Select the correct charge
- Ensure all fields are correct
- Click Accept

#### 4.7 Submitting a claim

On the Main Screen of PPMP®

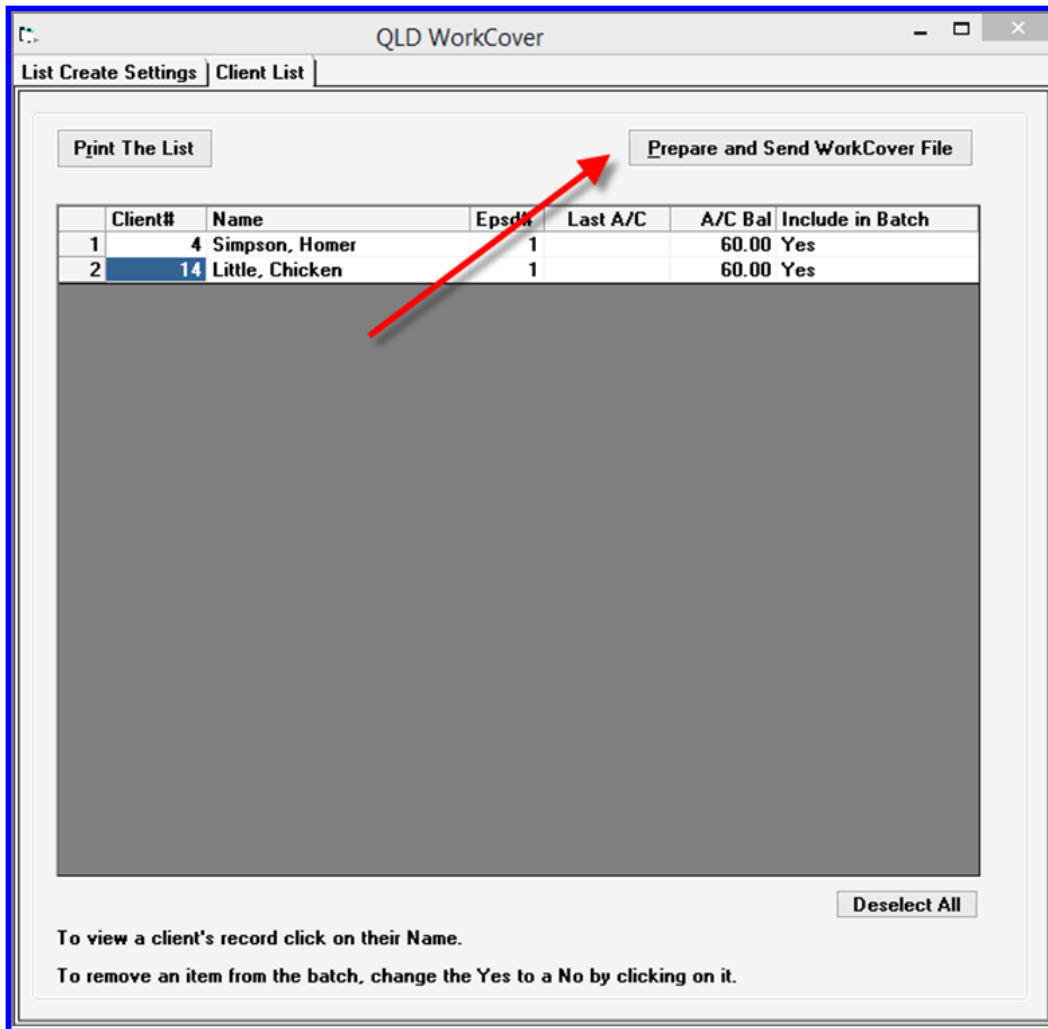


- Go to Accounts
- Transmit QLD WorkCover Accounts



- Select all Payment Methods and Treatment Locations with WorkCover charges
- Click Continue





QLD WorkCover

List Create Settings Client List

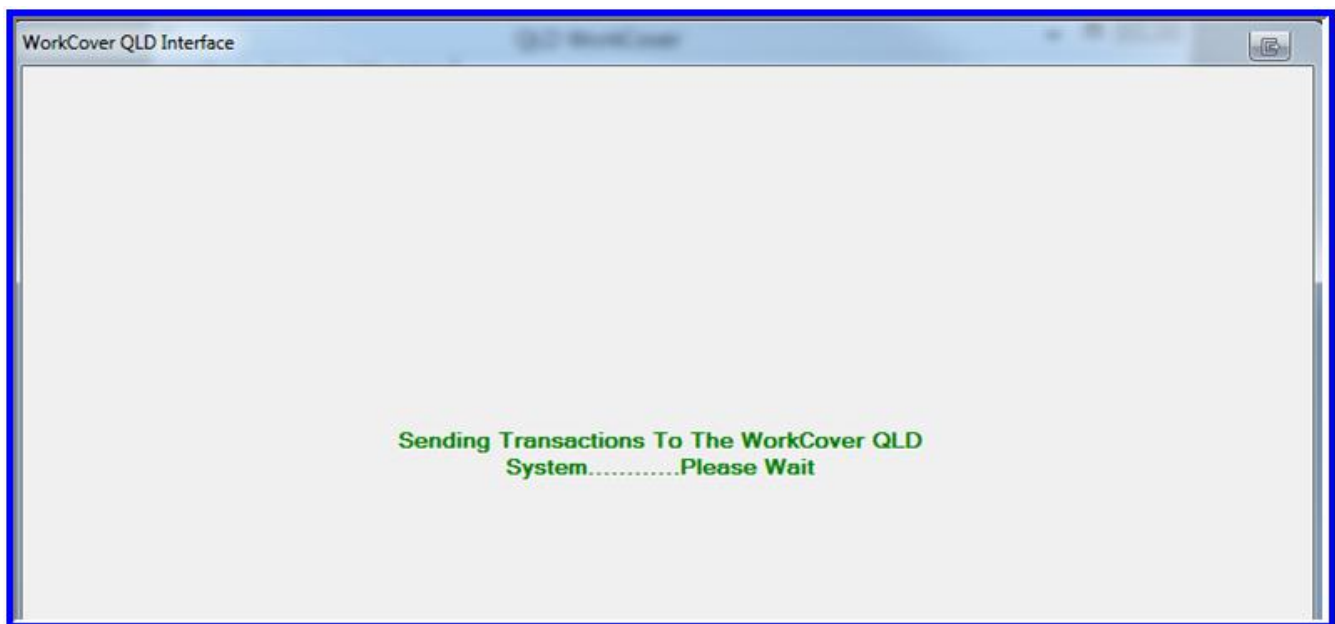
Print The List Prepare and Send WorkCover File

	Client#	Name	Epsd#	Last A/C	A/C Bal	Include in Batch
1	4	Simpson, Homer	1		60.00	Yes
2	14	Little, Chicken	1		60.00	Yes

Deselect All

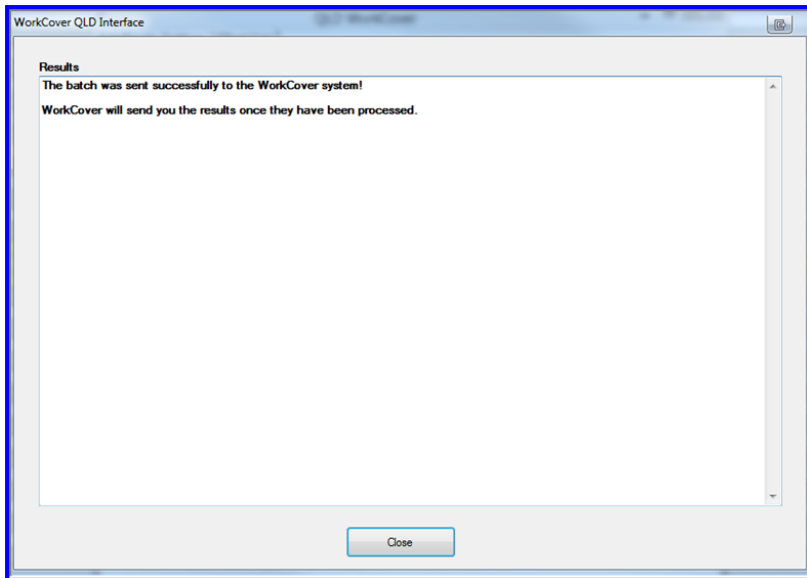
To view a client's record click on their Name.  
To remove an item from the batch, change the Yes to a No by clicking on it.

- Click Prepare and Send WorkCover File once the list has been created



WorkCover QLD Interface

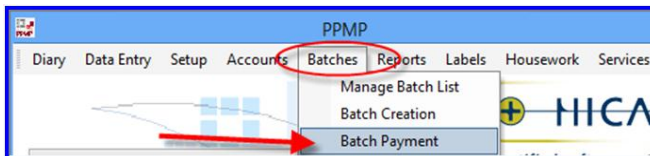
Sending Transactions To The WorkCover QLD System.....Please Wait



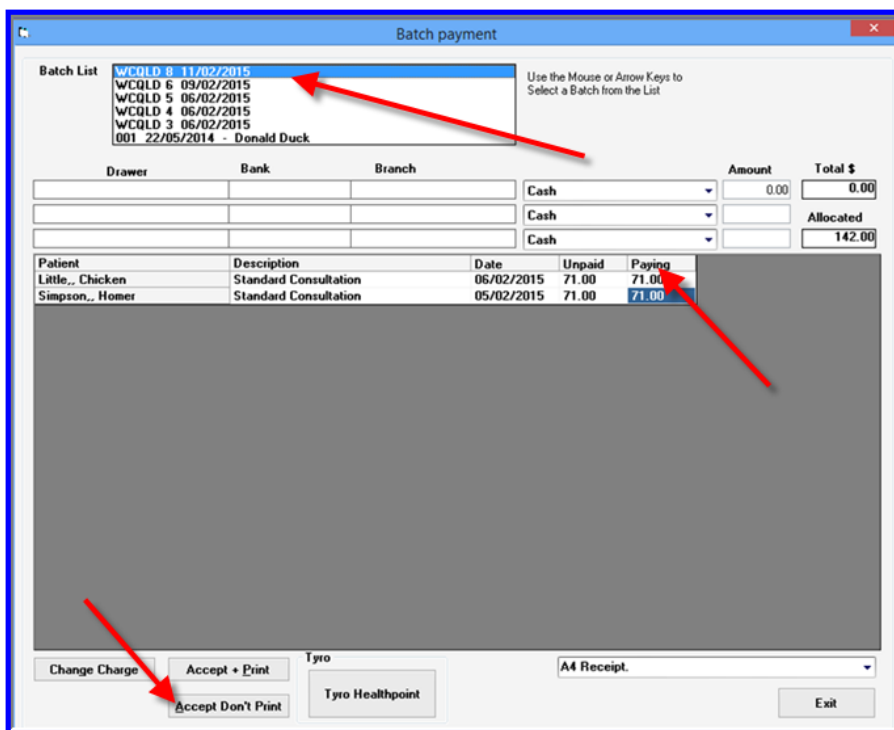
- Once transactions have been submitted the results screen appear confirming successful transmission

#### 4.8 Recording a payment

On the Main Screen of PPMP®



- Select Batches
- Select Batch Payment



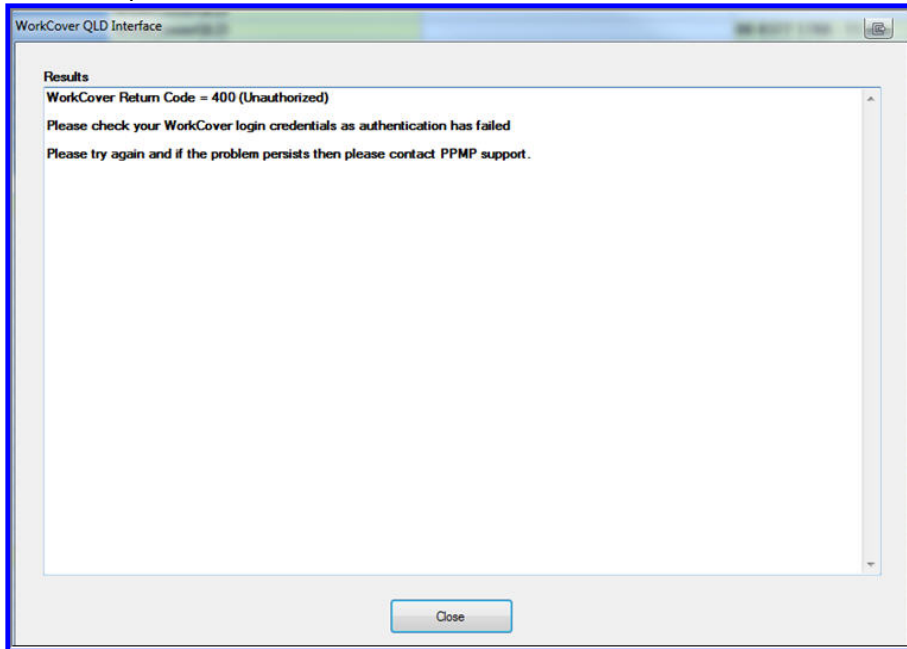
- Select the Batch you wish to pay
- Allocate the payments that you have been advised of
- Click Accept Don't Print

#### **4.9 WorkCover Queensland return and error handling codes**

The PPMP Workcover QLD module will show the following errors. See below for a brief description & trouble shooting.

##### **4.10 Workcover Return Code (400)**

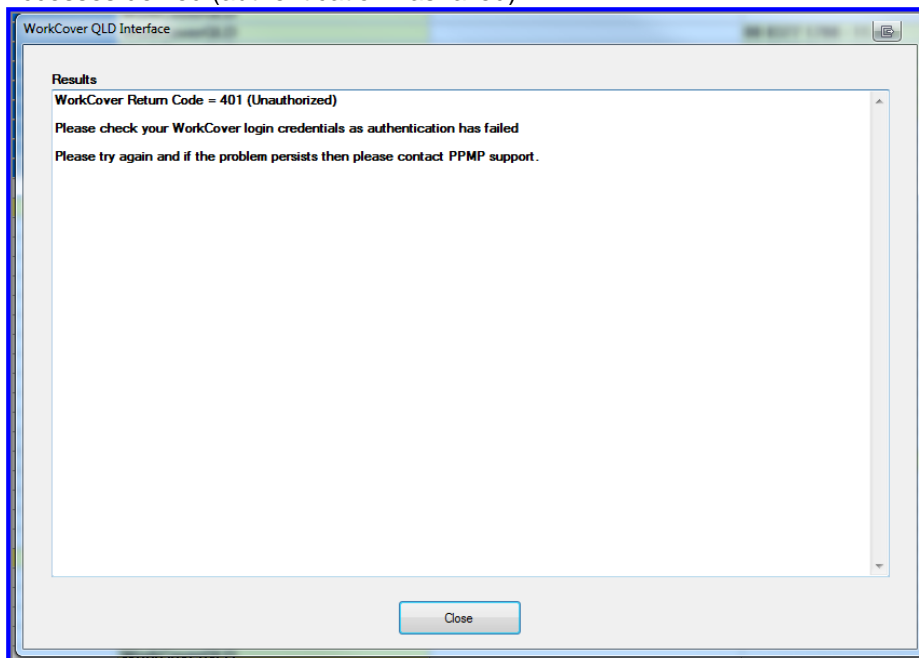
Client has provided malformed JSON or XML



Please verify all information you are transmitting is correct. If the return code still exists, please contact PPMP Support.

##### **4.11 Workcover Return Code (401)**

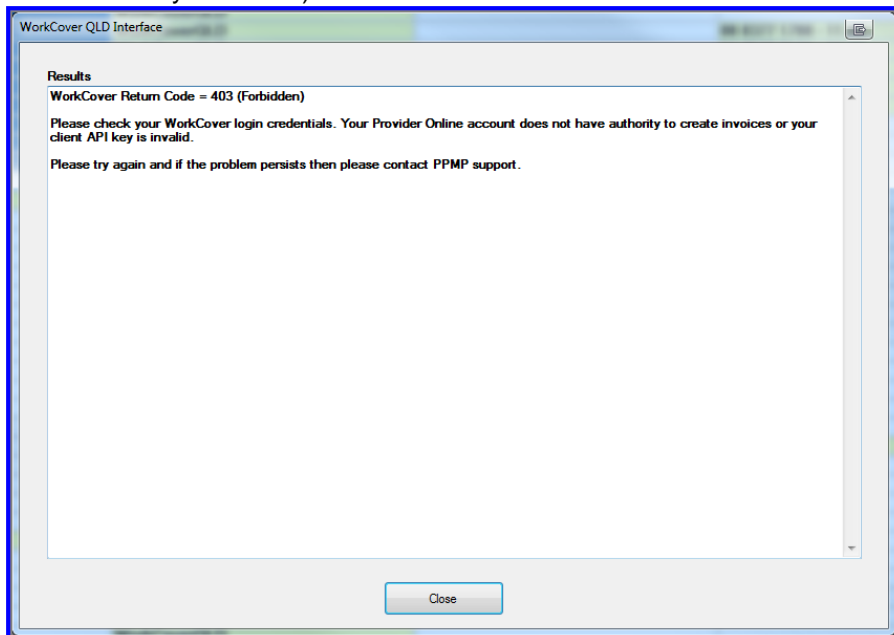
Accesses denied (authentication has failed)



Please verify all setup is correct & login information was entered correctly. Check with Workcover QLD that you have registered correctly. If the return code still exists, please contact PPMP Support.

#### **4.12 Workcover Return Code (403)**

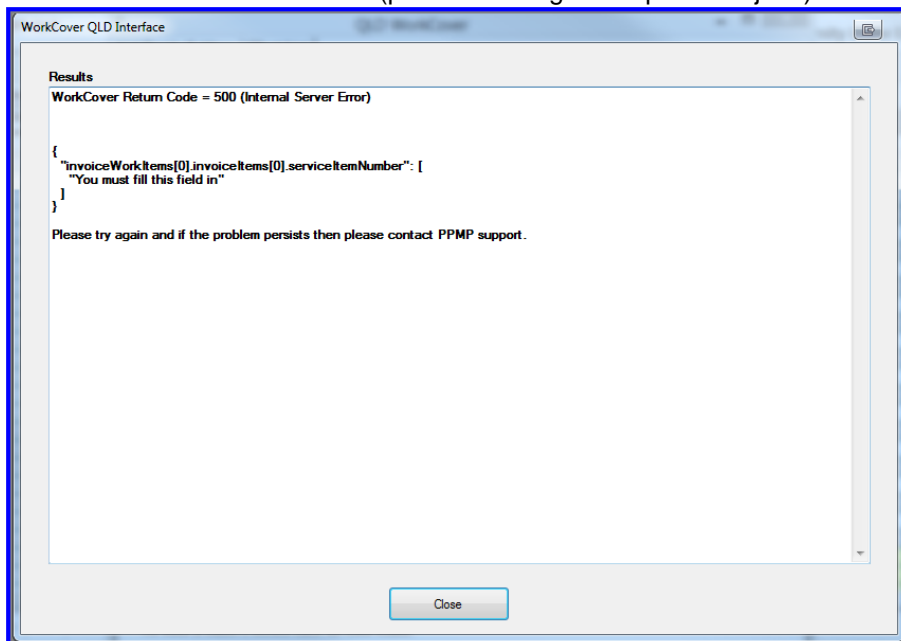
Accesses denied (authentication has failed – your Provider Online account does not have authority to create invoices, or the vendor API key is invalid.).



Please verify all setup is correct & login information was entered correctly. Check with Workcover QLD that you have registered correctly. If the return code still exists, please contact PPMP Support.

#### **4.13 Workcover Return Code (500)**

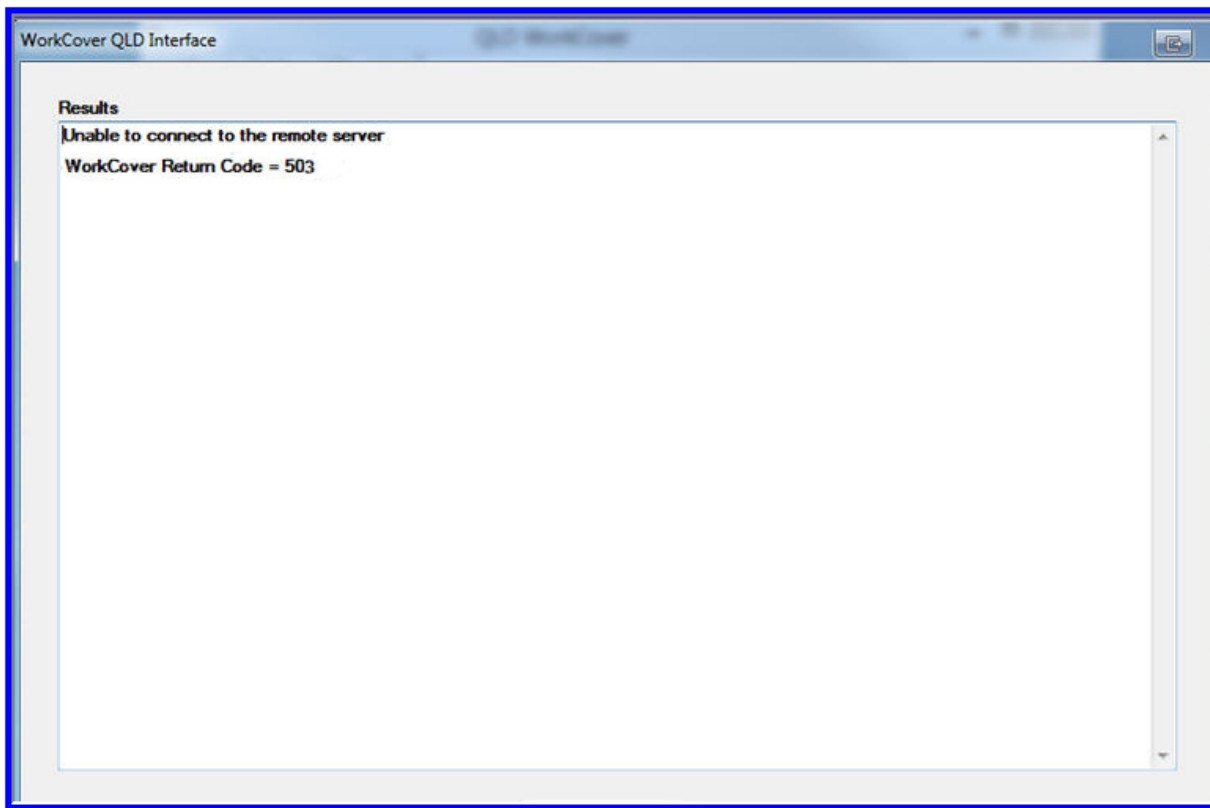
A Service-side error has occurred (please interrogate response object.).



Please verify all information you are transmitting is correct. If the return code still exists, please contact PPMP Support.

#### **4.14 Workcover Return Code (503)**

The WCQ services are down.



Please verify your workstation is connected to the internet & a firewall is not blocking PPMP access. Check with Workcover QLD that the service is available. If the return code still exists, please contact PPMP Support.

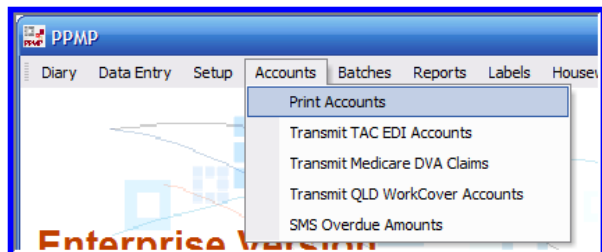
## **Section 3 – PPMP® user manual**

### **5 Account (Invoice) runs – printing, emailing and SMS'ing accounts**

Account print runs are used to automate the printing of accounts for a range of patients.

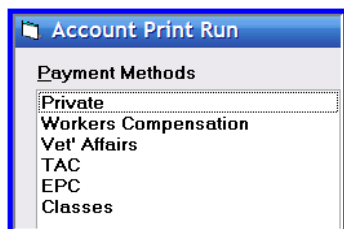
#### **5.1 Print accounts – Stage 1**

On the Main Menu PPMP®

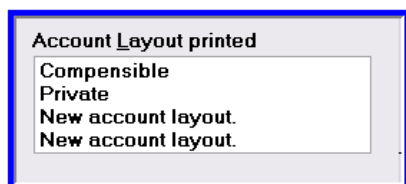


- Click Accounts
- Click Print Accounts

Supply the settings that will be used to decide who should receive an account.



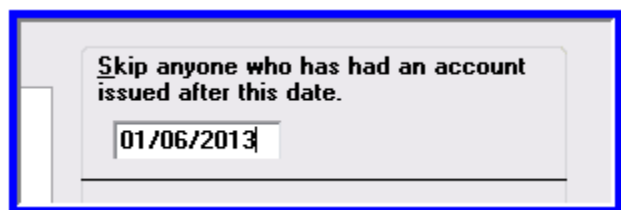
- Select the payment methods to be included in this run.



- Choose what account layout you want used.
- Only one account style can be chosen at a time



- No need to choose a Treatment Location (all will be included)



- The cut-off date will automatically load a one-week cut-off (skip anyone who received an account in the last week.)

## 5.2 Controlling which charges are itemized

- ☐ Skip if there are no new charges

☐ Skip if there is no claim number

- You can choose to skip patients if there are no new charges or no claim number

**There are two mutually exclusive approaches to the account print run.**

- ☐ Itemise **New charges only**

☒ Itemise **All unpaid charges.**

OR

- Itemise New Charges only – your account will print a Balance brought forward from the most recent previous account, and then any new charges are itemised.
- Itemise All Unpaid Charges - your account will print all unpaid charges.

OR

**Itemise all charges on + after this date,  
but don't itemise any before this date.**

(NB If not blank, overrides option above)

- Itemise all charges from a particular date
- Enter a 'cut off' date - all charges incurred on or before that date are covered by a Balance brought forward entry (even if they haven't been printed previously).
- All charges after that date will be itemised even if they have already been printed on an account.

**Don't include charges dated after this date**

- Ignore charges added after a specified date (Any charges added on or after this date are ignored)

☒ **Don't print the  
Balance BFwd**

- Choose whether or not to Print the Balance Bought Forward

**Continue**

- Click Continue

### 5.3 Account print run stage 2

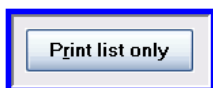
When Stage One is complete and you press the 'Continue' button, the program will scan your patient files and select the patients that meet the requirements you specified in Stage One.

A list is displayed on screen. You can then proceed to do the following: -

Account Print Run					
No	Name	Ep'sd	Last A/C	A/C Bal'	Print
1	1 Crompton Karen	1		250.00	Yes
2	3550 Mouse Minnie	1		250.00	No
3	3552 Duck Donald	1		100.00	Yes

- Look through the list and cancel particular accounts.
- Do this by changing the print status (see the right hand column) from 'Yes' to 'No'.
- You can also view a Client's record by clicking on their number

You can print the listing as shown.



- Press the 'Print list only' button.

You can finish without printing the accounts. Press the 'Exit' button.

### 5.4 Delay settings

At the bottom of the screen you will see

Wait  seconds after every  account.

- Wait 5 seconds after every 1 account - this facility is there so you can instruct the program to print a certain number of accounts and then pause for up to a minute.

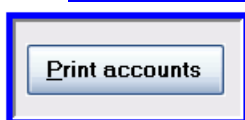
Wait  seconds after every  account.

- These numbers are changed by clicking on them and typing in the desired number.

Wait  seconds after every  account.

- You can disable this option by setting the delay or the number of accounts to '0' – this means you will not be able to print anything else until your account print run has finished

### 5.5 Print Accounts



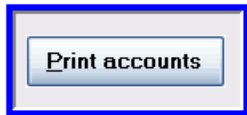
- Press the 'Print accounts' button to print the accounts
- The program will start at the top of the list and print an account for each entry that has a 'Yes' in the Print column of the list. As each account is printed the 'Yes' will change to 'No'.



## 5.6 Pausing or stopping the print run



- When printing starts, a Pause button will appear.
- Pressing this button at any time will have the printing process complete the account it is working on and then stop and return to the print list as at the end of Stage Two.



- You can restart printing by pressing the “Print accounts” button again.
- Already printed entries will be skipped, as their print status will now read 'No'. (You can request any of these entries by changing their 'No' status back to 'Yes' by clicking on the 'No').

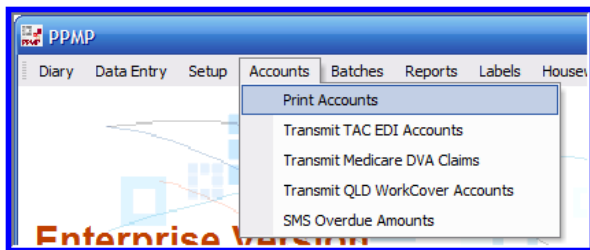
## 5.7 Change the print delay settings during printing.

You can change the delay time, the number of accounts printed between delays, or disable this facility, while the printing is taking place.

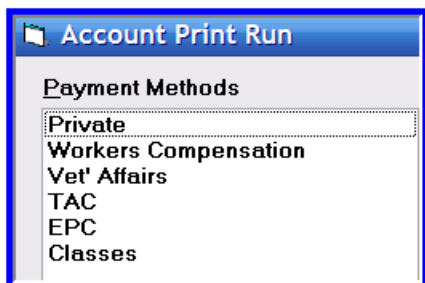
## 5.8 Email accounts

## 5.9 Email accounts – Stage 1

On the Main Menu PPMP®



- Click Accounts
  - Click Print Accounts
- Supply the settings that will be used to decide who should receive an account.



- Select the payment methods to be included in this run.

Account Layout printed

Compensible  
Private  
New account layout.  
New account layout.

- Choose what account layout you want used.
- Only one account style can be chosen at a time

Treatment locations

Rooms  
Hospital  
Home Visits

- No need to choose a Treatment Location (all will be included)

Skip anyone who has had an account issued after this date.

01/06/2013

- The cut-off date will automatically load a one-week cut-off (skip anyone who received an account in the last week.)

**Controlling which charges are itemized**

☐ Skip if there are no new charges

☐ Skip if there is no claim number

- You can choose to skip patients if there are no new charges or no claim number

**There are two mutually exclusive approaches to the account print run.**

☐ Itemise New charges only

☒ Itemise All unpaid charges.

OR

- Itemise New Charges only – your account will print a Balance brought forward from the most recent previous account, and then any new charges are itemised.
- Itemise All Unpaid Charges - your account will print all unpaid charges.

OR

Itemise all charges on + after this date, but don't itemise any before this date.

// (NB If not blank, overrides option above)

- Itemise all charges from a particular date
- Enter a 'cut off' date - all charges incurred on or before that date are covered by a Balance brought forward entry (even if they haven't been printed previously).
- All charges after that date will be itemised even if they have already been printed on an account.

**Don't include charges dated after this date**

  /  /

- Ignore charges added after a specified date (Any charges added on or after this date are ignored)

☒ **Don't print the Balance BFWd**

- Choose whether or not to Print the Balance Bought Forward

**Continue**

- Click Continue

### **5.10 Email accounts – Stage 2**

When Stage One is complete and you press the 'Continue' button, the program will scan your patient files and select the patients that meet the requirements you specified in Stage One.

A list is displayed on screen. You can then proceed to do the following:

**Account Print Run**

No	Name	Ep'sd	Last A/C	A/C Bal'	Print
1	1 Crompton Karen	1		250.00	Yes
2	3550 Mouse Minnie	1		250.00	No
3	3552 Duck Donald	1		100.00	Yes

- Look through the list and cancel particular accounts.
- Do this by changing the print status (see the right hand column) from 'Yes' to 'No'.
- You can also view a Client's record by clicking on their number

You can print the listing as shown.

**Print list only**

- Press the 'Print list only' button.
- Press the 'Email accounts' button to email the accounts

**Email Accounts**

PPMP

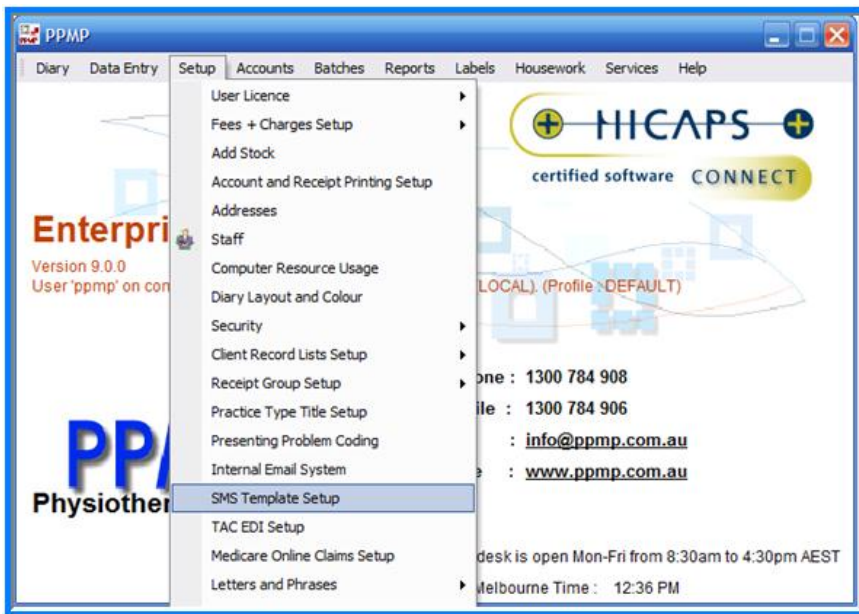
Are you sure you wish to print/email the selected accounts?

- Click Yes to send the Accounts via email

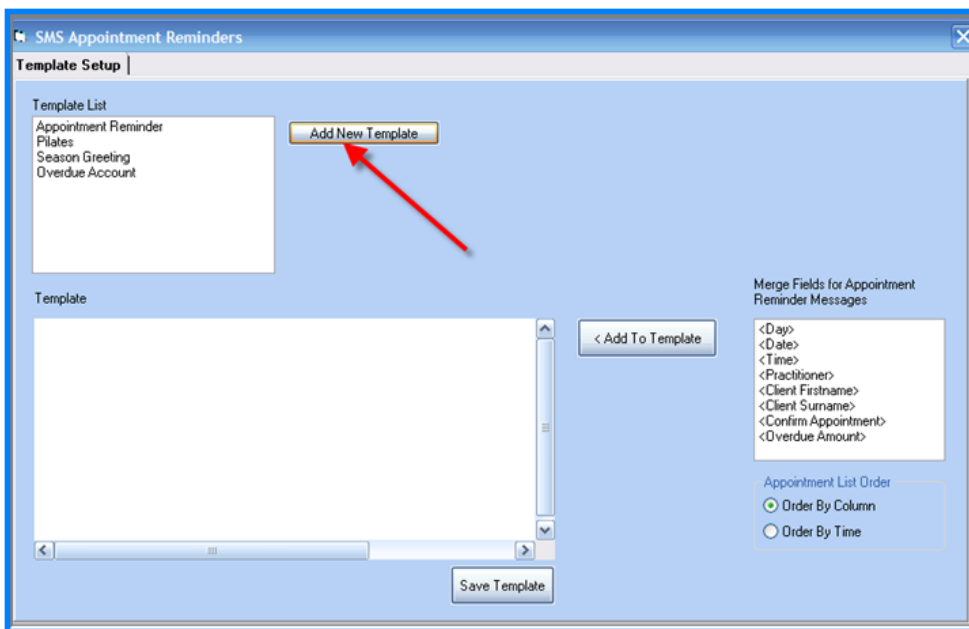
### 5.11 SMS overdue accounts

Click [HERE](#) to watch video

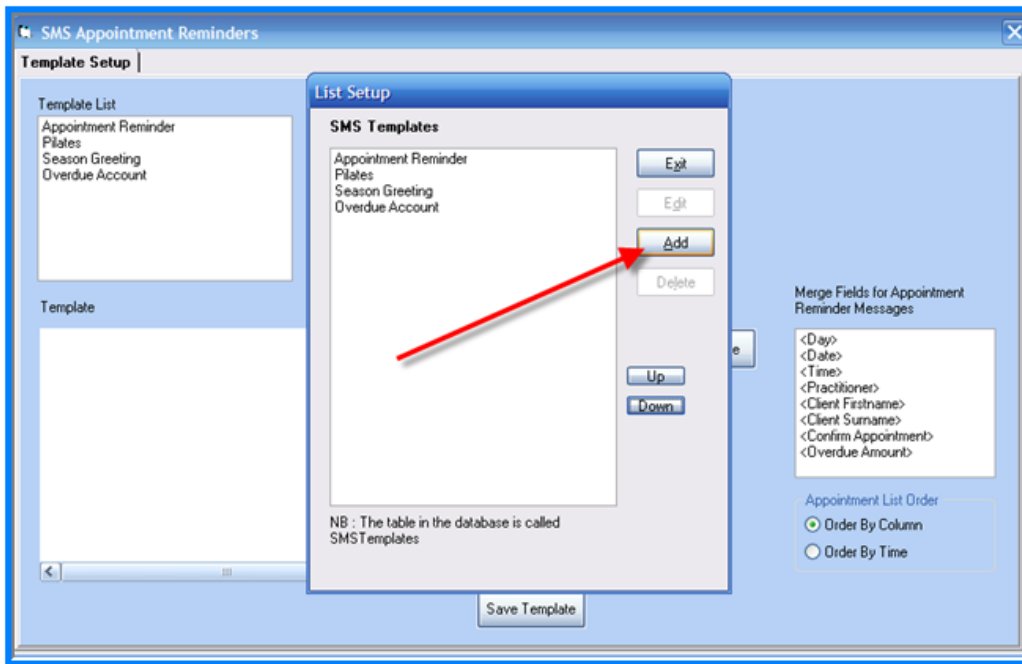
**NB:** You will need to set up an Account or Overdue account SMS template first.  
To do this on the Main Menu PPMP®



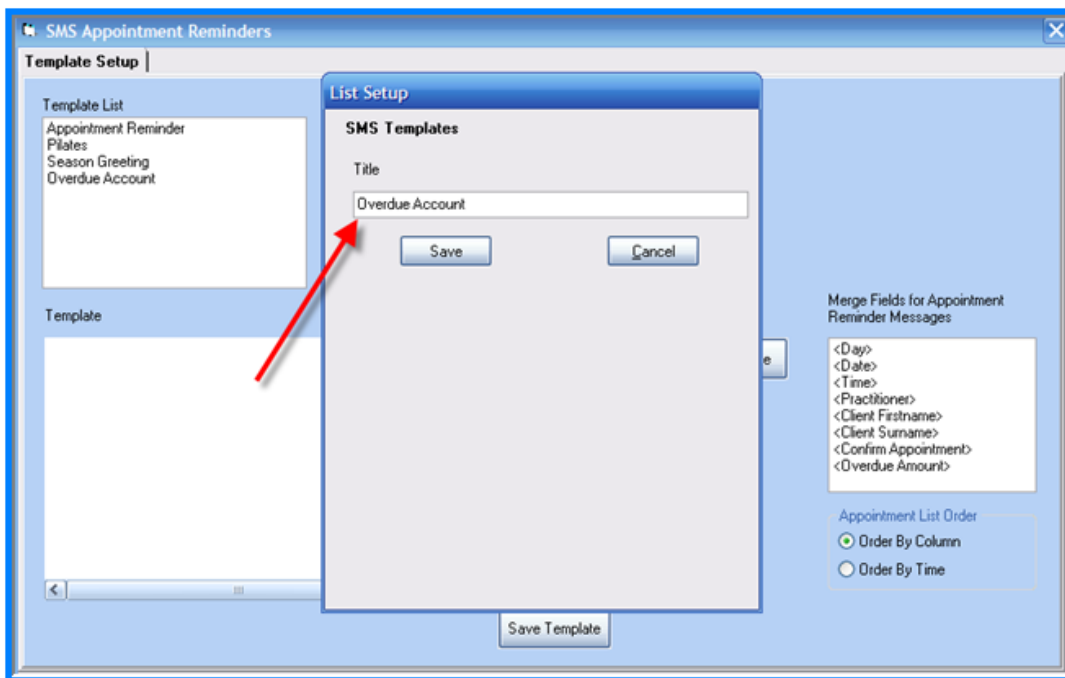
- Go to SMS Template Setup



- Click Add New Template



- Click Add



- Type in title for new SMS template (e.g. Account or Overdue account)
- Click save

**SMS Appointment Reminders**

Template Setup |

Template List

- Appointment Reminder
- Pilates
- Season Greeting
- Overdue Account**

Add New Template

Approx Message Size (156)

Template

Hi <Client Firstname> , A friendly reminder your account for the amount of <Overdue Amount> contact PPMP to make payment on 1300 784 908.

< Add To Template >

Save Template

Merge Fields for Appointment Reminder Messages

- <Day>
- <Date>
- <Time>
- <Practitioner>
- <Client Firstname>
- <Client Surname>
- <Confirm Appointment>
- <Overdue Amount>

Appointment List Order

- ☒ Order By Column
- ☐ Order By Time

- Select the template in the list you want to setup and type in the information you require.

**NB:** The Approximate message size will also be displayed and how many messages you will be charged for (see examples below)

**SMS Appointment Reminders**

Template Setup |

Template List

- Appointment Reminder
- Pilates
- Season Greeting
- Overdue Account**

Add New Template

Approx Message Size (156)

Template

Hi <Client Firstname> , A friendly reminder your account for the amount of <Overdue Amount> contact PPMP to make payment on 1300 784 908.

< Add To Template >

Save Template

Merge Fields for Appointment Reminder Messages

- <Day>
- <Date>
- <Time>
- <Practitioner>
- <Client Firstname>
- <Client Surname>
- <Confirm Appointment>
- <Overdue Amount>

Appointment List Order

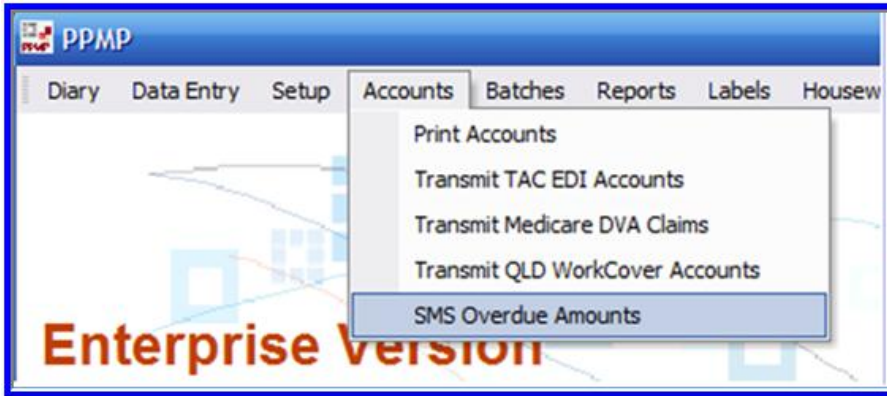
- ☒ Order By Column
- ☐ Order By Time

- Click save template

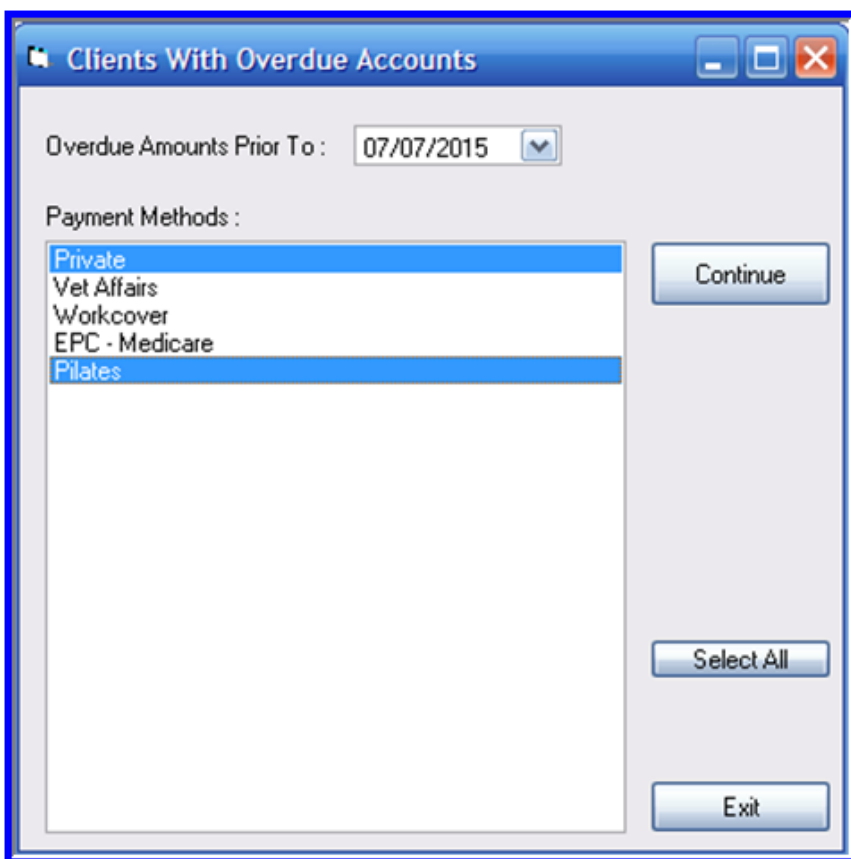
## 5.12 SMS account run

Click [HERE](#) to watch video

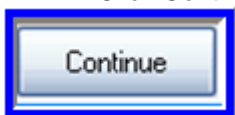
On the Main Menu PPMP®



- Select Accounts
- Select SMS Overdue Amounts



- Click Continue



**SMS Appointment Reminders**

Select Template To Use | Review Messages/Recipients and Send

STEP 1: Choose a template or manually enter your own

Select a Template to use for the Reminders

- Appointment Reminder
- Pilates
- Season Greeting
- Account
- Overdue Account

Now Edit OR Create Your Message Template below

Appointment Reminder Template Editor

Hello <Client Firstname>, Just a reminder you have an outstanding account in the amount of <Overdue Amount>. Please call PPMP on 1300784908 to arrange payment.

Appointment Reminder Merge Fields

- <Day>
- <Date>
- <Time>
- <Practitioner>
- <Client Firstname>
- <Client Surname>
- <Confirm Appointment>
- <Overdue Amount>

Next Step

- Select the template you wish to use and click Next Step

Next Step

- You can now either send SMS accounts now or remove any you do not wish to send or even delay the sending of the accounts to a later time and date.

**SMS Appointment Reminders**

Select Template To Use | Review Messages/Recipients and Send

Reminder List: [ 9 Items]

Sent	Client No	Client Name	Appt Date	Appt Time	Practitioner	Phone
1 No	3	Simpson, Bart				954123685414
2 No	4	Simpson, Homer				0400262073
3 No	5	Amadolois, Aristotle				0400000000
4 No	6	Brockman, Kent				0400000000
5 No	7	Godmother, Fairy				0400000000
6 No	8	Disco, Stu				0400000000
7 No	10	Elephant, Dumbo				0400000000
8 No	11	Flander, Ned				0400000000
9 No	14	Little, Chicken				0400000000

STEP 3: click here to send the reminders

Send SMS Reminders Now

Delayed Send Of Reminders

Remove Reminder(s)

Message Preview (you can edit this message before sending if you like)

Hello Chicken, Just a reminder you have an outstanding account in the amount of \$90.00. Please call PPMP on 1300784908 to arrange payment.

- When your happy with your selections click Send SMS Reminders Now

SMS

! SMS messages have been sent.

OK

- Your messages have now been sent.



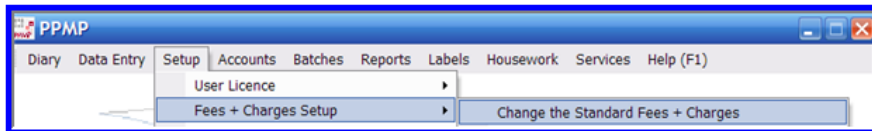
## 6 Alarms

The PPMP system has an alarm function, which can warn you about the number of treatments for a patient.

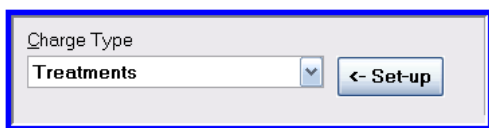
For compensation patients in particular or any patient in the database there is a function that allows you to set a date or a specific number of treatments, where once they have reached or passed the set date or treatment number the system will give you a warning.

**Before setting alarms you must make sure your Treatments are being marked as Treatments – to do this**

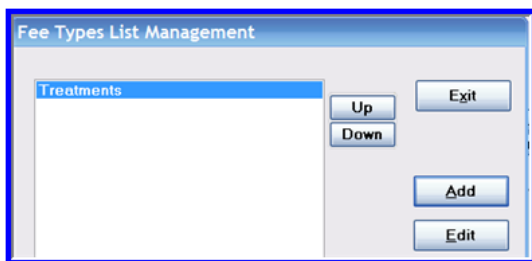
Go to Setup (on the Main Menu)



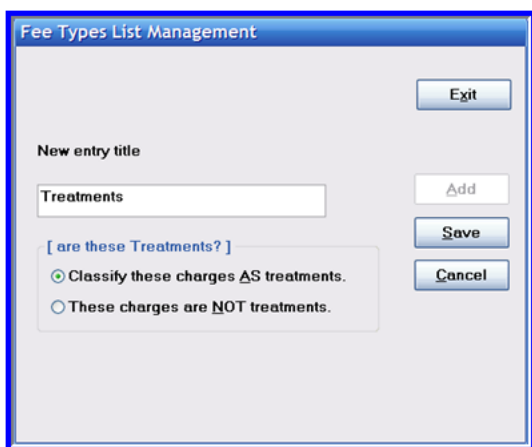
- Fees & Charges Setup
- Change the Standard Fees & Charges



- Click Setup (next to Charge Type)



- Select Treatments
- Click Edit



- Select "Classify these charges AS treatments"
- Save & Exit and back to the main menu.

- Open a client's file and go to Episodes
- Click on Alarms – To Do List

There are a few different alarms explained as follows: -

### 1. Number of Treatments Approved (total)

- Put into Rx's approved (total) the number of treatments approved. Each time a Treatment is charged the "Total so far" will increase.
- Put a number in the field beside the "Number of Rx warnings" and a small message in the message field.

- When the client comes within the last 2 of these treatments their name will appear in a light red/pink background with the Number of remaining approved treatments beside it.

- By entering the date after the number of treatments this allows you to set a number of treatments within a certain time frame and a small message in the message field. Therefore once the patient has been charged for the number of treatments set in the alarm section (before the optional date) you will receive the message as a warning.


- When they exceed the Number of approved treatments their name will appear in red with a negative number beside it.

## 2. Repeated Appointments

Warn me every	6	th visit	Starting from visit	1
New Referral Required				

- If you want to be reminded every so many appointments e.g. if you wanted to review a case say every 6<sup>th</sup> visit.

Episode Treatment Repeated ...



New Referral Required

OK


- This alarm is triggered at the time the treatment is recorded (charged).

## 3. New Appointment

Warn if new appointment is after this date	10/04/2012
Message	New Referral Required

- Enter a date in the “Warn if new appointment is after this date” alarm field and a small message,

APPOINTMENT DATE ALARM



The alarm is set to sound from : 10/04/2012

Alarm message below :-

New Referral Required

OK

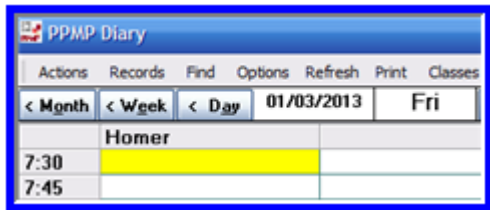
- When making an appointment on the diary after that date the alarm will be triggered and the message will be displayed.

## 7 Appointments

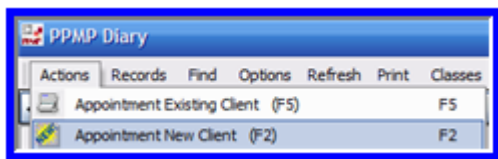
When making an appointment you will be faced with one of three situations.

- For a New client
- For an existing client
- For an existing client who **has** an appointment already on the diary.

### 7.1 New client appointments



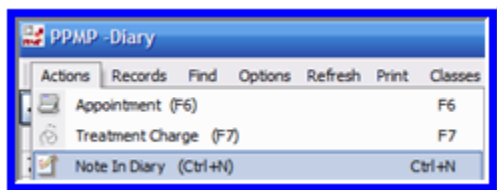
- Select the appointment day, time and column where you want to put the appointment.



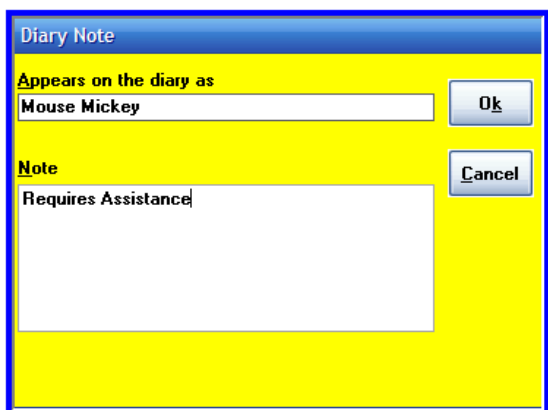
- Click 'Actions'
- Select 'Appointment New Client'

- An input box will be displayed with an area to type the patient's name.
- It is recommended you use the convention **Surname** then First name when entering names.
- Press Enter
- This will move you to the notes area. (Use this to make a note about new patients e.g. Requires assistance or phone numbers)
- Press Enter
- Enter a mobile number (if necessary)
- Click Ok to record the entry

You can view a new client's note area by highlighting the appointment,



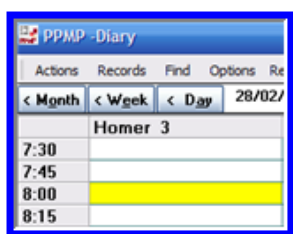
- Click Actions
- Click Note in diary



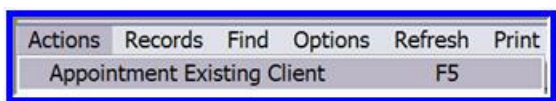
- You should now be viewing the above screen – you can add or change things in the note or mobile area.

## 7.2 Existing client appointments

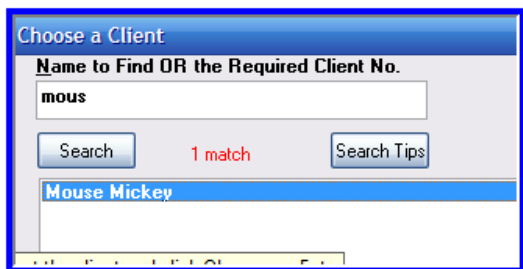
Click [HERE](#) to watch video



- Select the appointment day, time and column where you want to put the appointment.



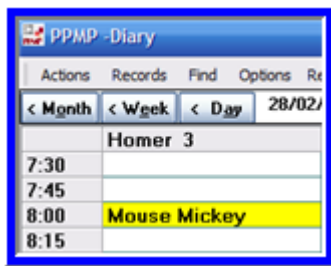
- Click Actions
- Select Appointment Existing Client



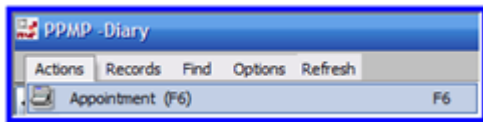
- The Choose a Client box will appear
- Type in Surname of client (or 3-4 letters)
- Highlight the client you want on the list
- Click OK - the appointment will be entered on the diary.

### 7.3 Rebooking clients from a diary appointment

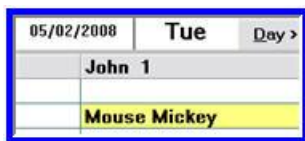
Click [HERE](#) to watch video



- Select the existing appointment from the diary.



- Click Actions
- Click Appointment



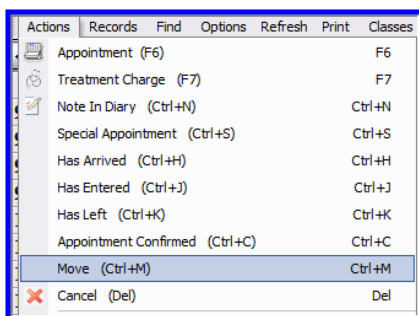
- Move to where you want to put the new appointment & Press Enter

### 7.4 Moving appointments

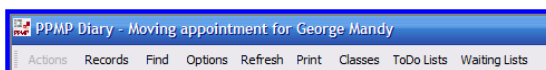
Click [HERE](#) to watch video



- Select the appointment on the diary that you want to move.
- Click Actions
- Select move



- The patient name will disappear off the diary and show in the top bar of PPMP®.



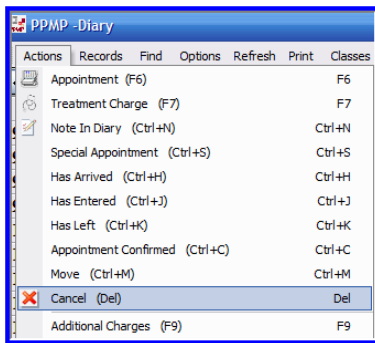
- Select the appointment day, time and column where you want to move the appointment to and double click on the empty spot to insert the patient.

## 7.5 Cancelling appointments

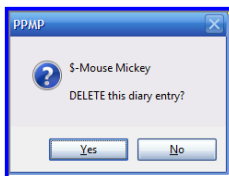
Click [HERE](#) to watch video

S-Mouse Mickey	11:00am
	11:15am
	11:30am

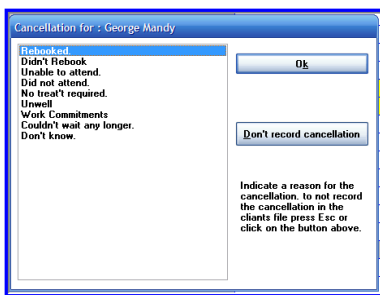
- Select the appointment on the diary that you want to cancel.
- Click Actions
- Select cancel



- A new option menu will now appear

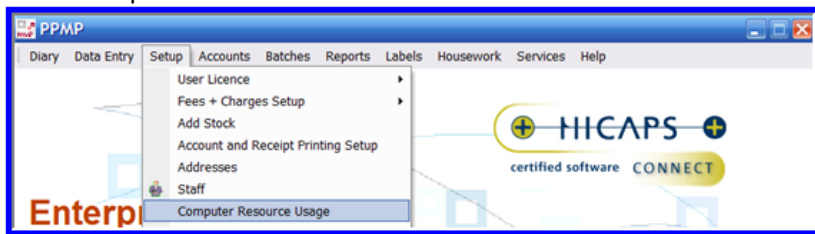


- At this stage if you have made a mistake you can select no and nothing will be canceled.
- Select **YES** if you are sure you want to cancel this appointment.
- You will now be given an option list to record the reason for the cancellation.
- Select the reason and click ok.

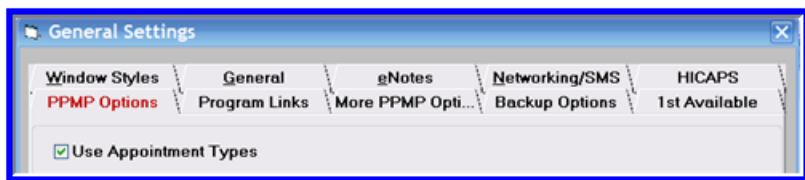


## 8 Appointment types

Go to Setup on the Main Menu

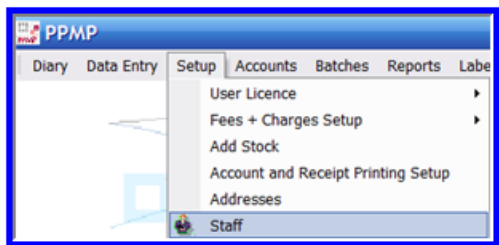


- Computer Resource

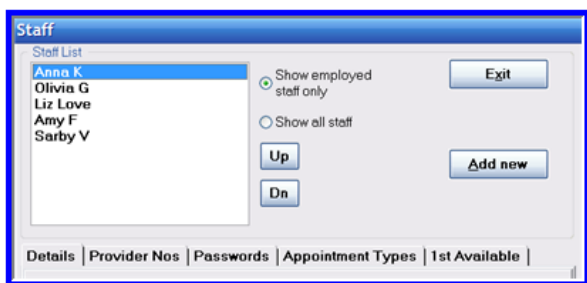


- Click PPMP Options
- Tick Use Appointment Types
- Click OK
- Close PPMP and Re Open

On the Main Menu



- Go to Setup
- Staff

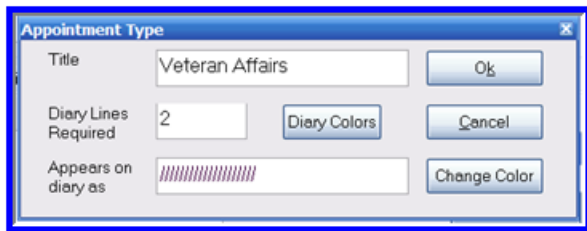


- Select staff member
- Select Appointment Types



- Click Add New

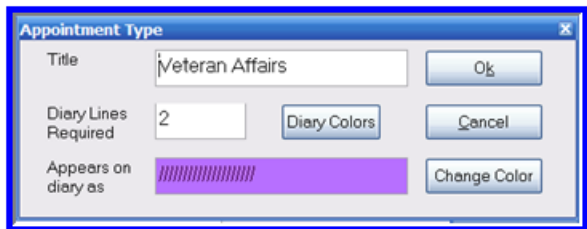




The 'Appointment Type' dialog box has the following fields and buttons:

- Title:** A text box containing 'Veteran Affairs'.
- Diary Lines Required:** A text box containing '2'.
- Appears on diary as:** A text box containing a series of diagonal lines.
- Buttons:** 'Ok', 'Cancel', 'Diary Colors', and 'Change Color'.

- Enter a Title Name
- Select how you would like it to appear on the diary
- Click Change color



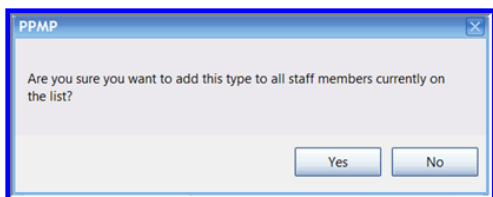
This is the same 'Appointment Type' dialog box as above, but the 'Change Color' button is highlighted with a red rectangle.

- Click OK
- Continue this process until all Appointment types have been created



A button labeled 'Add to All' with a red border.

- Click Add to All (this will add the same appointment types to all staff)



The 'PPMP' dialog box contains the text: 'Are you sure you want to add this type to all staff members currently on the list?'. It has 'Yes' and 'No' buttons.

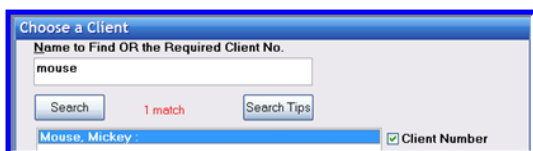
- Click Yes

## 8.1 Making appointment types



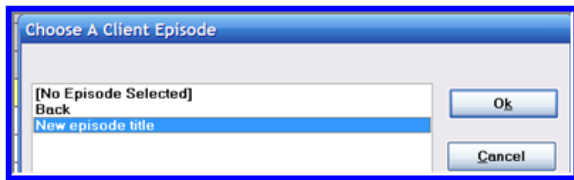
The 'PPMP -Diary' menu shows the following options: 'Actions', 'Records', 'Find', 'Options', 'Refresh', 'Print', 'Appointment Existing Client (F5)', 'Appointment New Client (F2)', and 'Appointment Types'.

- Click Actions
- Click Appointment Types

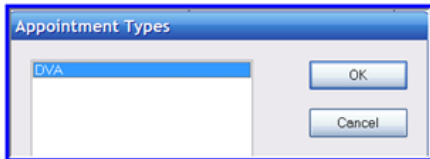


The 'Choose a Client' dialog box has a text box for 'Name to Find OR the Required Client No.' containing 'mouse'. Below it are 'Search' and 'Search Tips' buttons. A status bar shows '1 match' and 'Client Number' is checked.

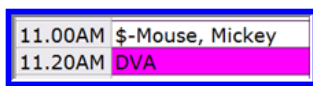
- Select client
- Click OK



- Select Episode
- Click OK



- Appointment Types will be listed
- Select the Appointment type (DVA)



- The Appointment type requires 2 lines
- Charge and receipt as normal

## 9 Attendance notes, template setup - charts – viewing/editing

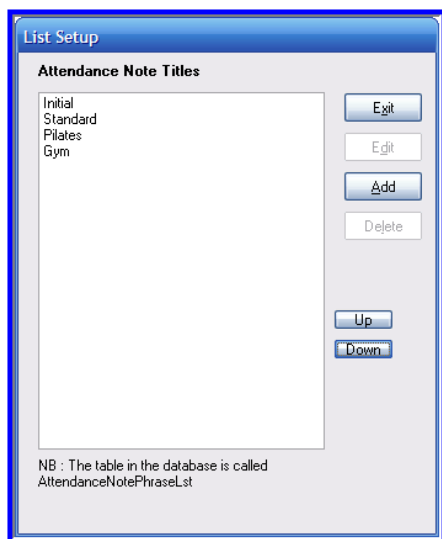
Click [HERE](#) to watch video

### 9.1 Template setup

From the Main Menu of PPMP®



- Select Setup
- Select Attendance notes
- Select Template Title Setup



- List Setup screen appears
- Click Add for a new title

**List Setup**

**Attendance Note Titles**

Title

Review

Save Cancel

- Type the new title list name and click save

**List Setup**

**Attendance Note Titles**

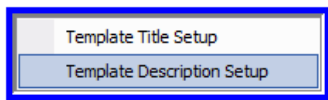
Initial  
Standard  
Pilates  
Gym  
Review

Exit  
Edit  
Add  
Delete  
Up  
Down

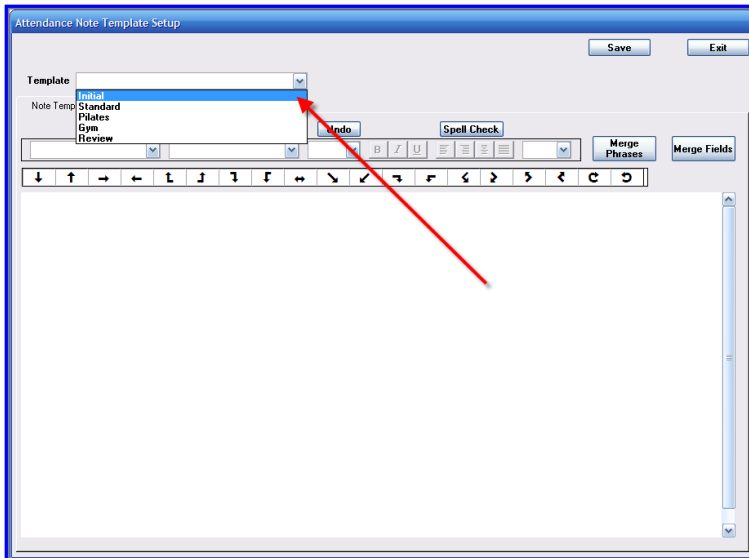
NB : The table in the database is called AttendanceNotePhraseLst

- The new title will appear in the list. You can move its position in the list with the UP/DOWN buttons on the right-hand side.
- Once happy with the list and all Title Templates are set click Exit

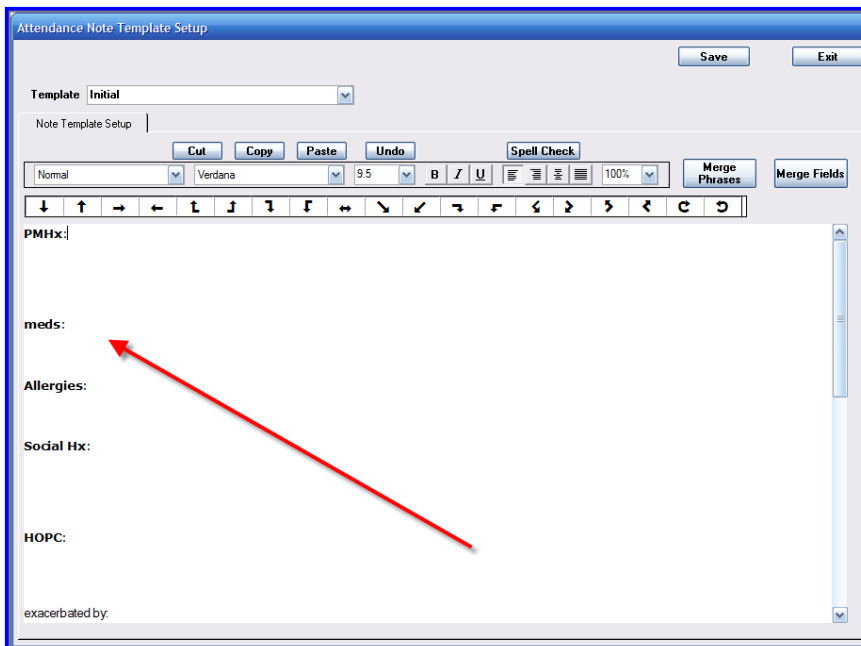
## 9.2 To add the body of the template



- Select Setup
- Select Attendance notes
- Select Template Description Setup

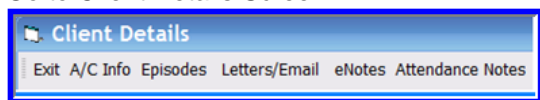


- Select the drop down box and select the Title you wish to edit
- Select Attendance notes
- Select Template Description Setup

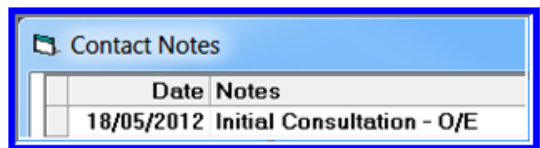


- Simple type in your information you can also use merge fields in here.
- Click Save & Exit
- Repeat this for all titles you wish to set a template in

Go to Client Details Screen



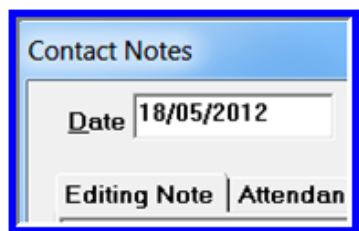
- Select Attendance Notes



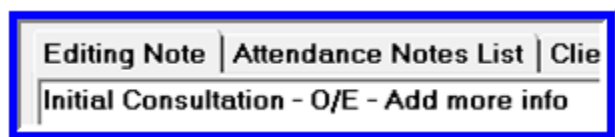
- Select Date for Editing



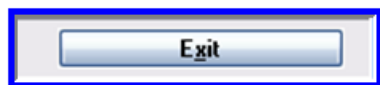
- Click Edit



- Click Editing Note



- Add extra text to your notes



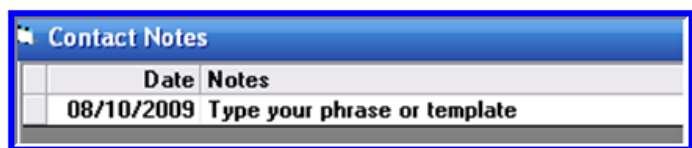
- Click Exit & Save Changes



- Phrase is inserted in notes
- You can add or edit text – click on date



- Click Exit & Save Changes



- All notes are listed



- Click on entry – select Edit, Add, Delete, Print
- Exit

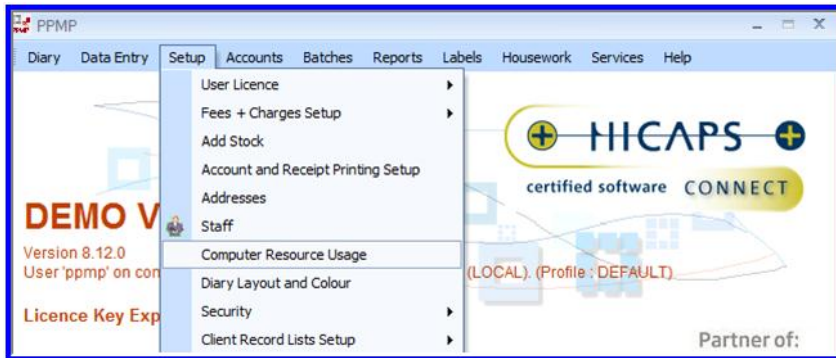
OR

- Select client on diary and go to Episodes
- Click Add
- Follow the above steps.

## 10 Backup instructions

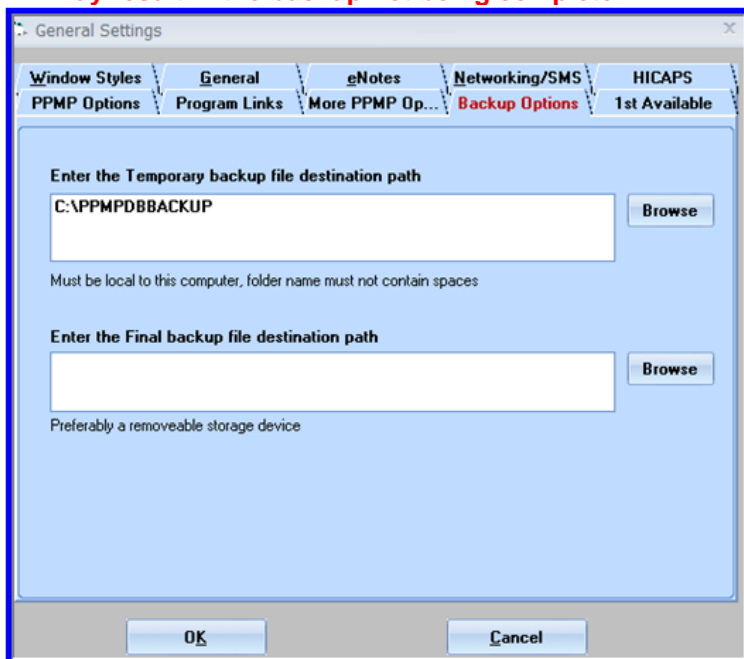
Click [HERE](#) to watch video

- Go to the Main Menu (PPMP®)
- Select 'Setup'
- Select 'Computer Resource Usage'



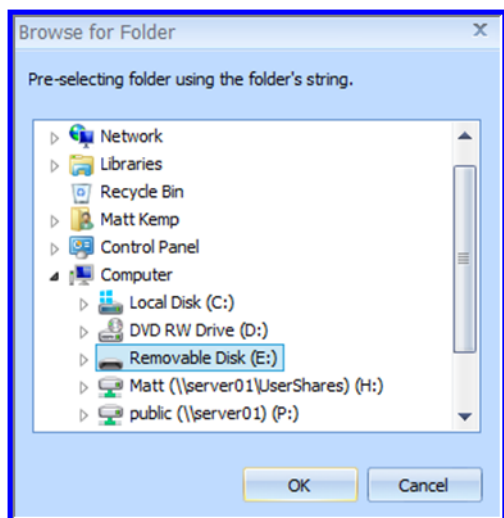
- Click on the 'Backup Options' tab

**NB:** The temporary backup location is set to a default location; do not change this as incorrect settings may result in the backup not being complete.

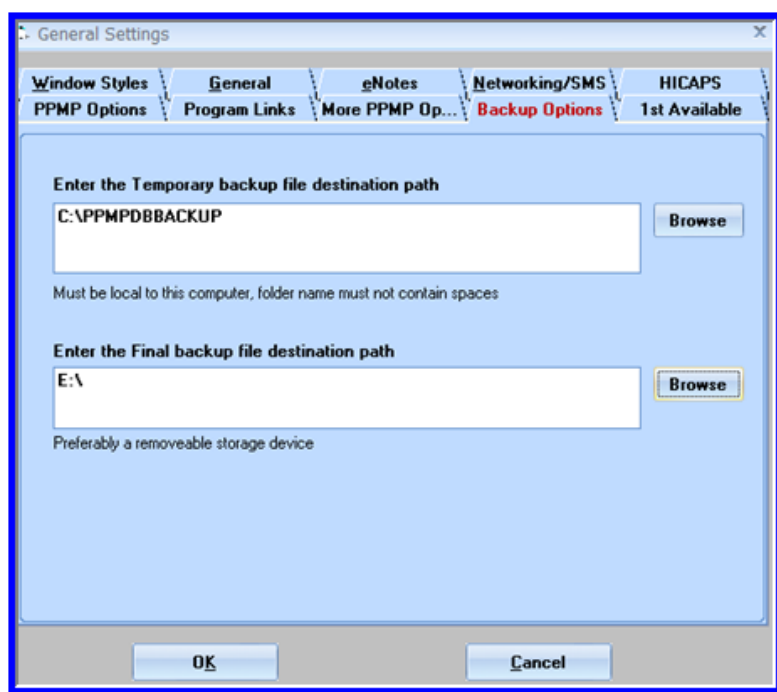


- Then select 'Browse' to enter in the final backup file destination path  
**Select the external drive you wish to backup to (do not select the Local Disk). Backups must go to a removable drive that can be taken offsite.**
- Click 'OK'





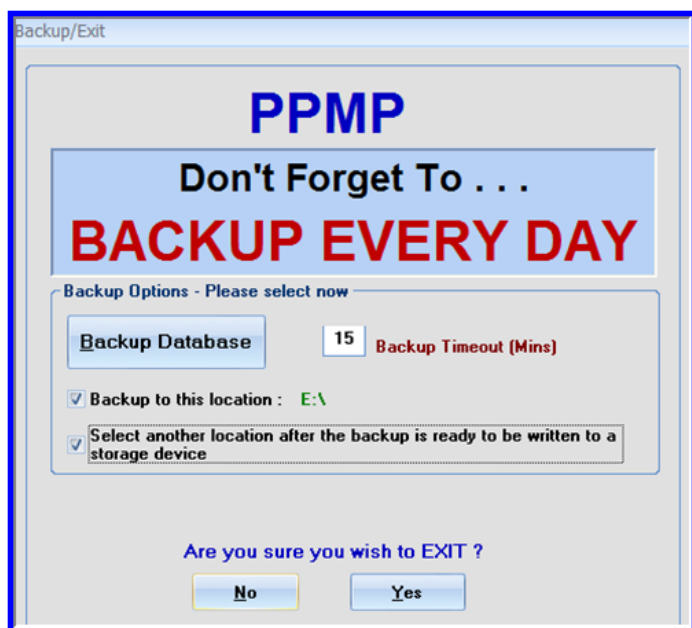
- Once you have selected the location click the 'OK' button



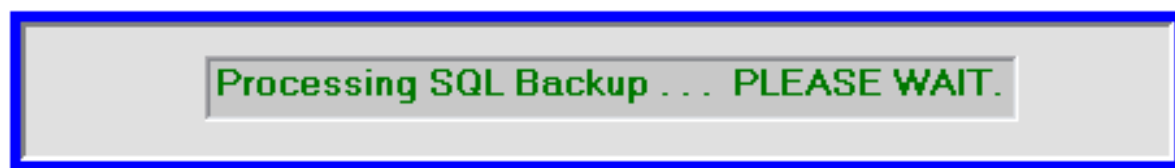
- You will then be taken back to the home screen
- For the changes to take effect you need to restart PPMP®. Click the 'X' in the top right hand corner



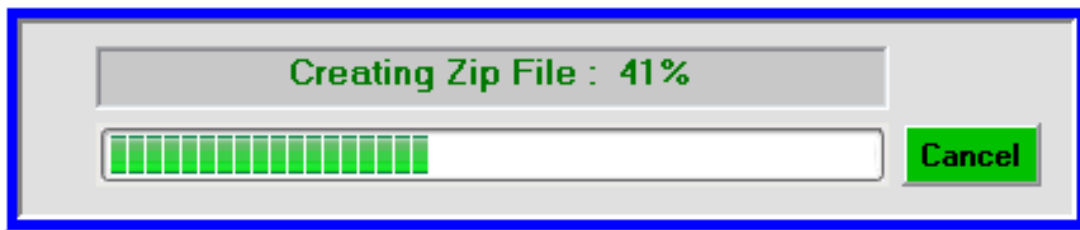
- If you wish to backup to another location, select the 2<sup>nd</sup> tick box. Once the initial backup is complete you will be prompted to select the location you wish to backup to.
- Click 'Backup Database'



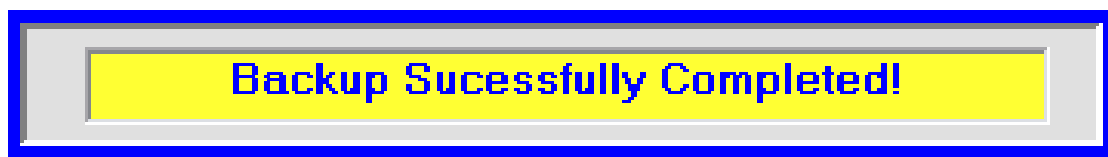
- The following window will appear indicating the backup process is happening.....Please wait



- The following window will appear indicating the zip file is being created.....Please wait



- The following window will appear indicating the backup has been successfully completed.
- You may now exit PPMP® or continue using PPMP®.



It is advisable to open your backup folder on the removable device and make sure all of the folders and the database are visible. If you are unsure, please contact our Customer Service Team for assistance – 1300 784 908/ Option 1 or [info@PPMP.com.au](mailto:info@PPMP.com.au)

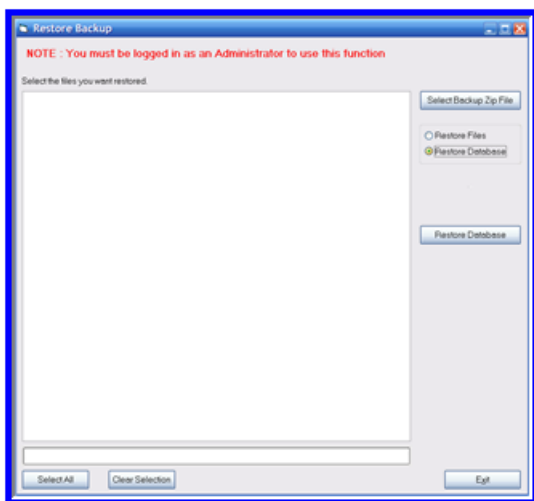
If using third party software, please contact us to discuss your requirements or to obtain help with a test restore. We will happily take calls from your IT provider if they have some specific or technical questions.

### 10.1 Restore PPMP® backup

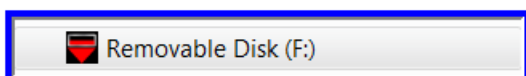
Insert Removable Drive



- Click on Services
- Click Restore Backup ZIP file



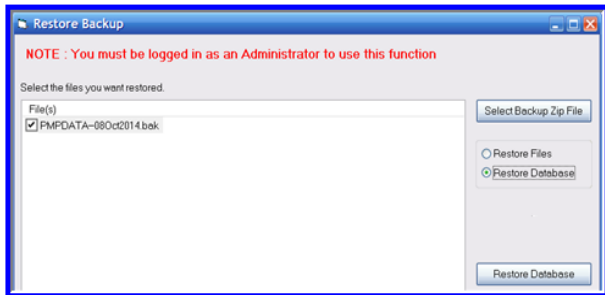
- Click on Restore Database or Select Backup Zip File



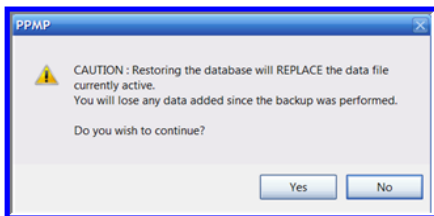
- Select Removable Disk Drive (or where browse to where backup is stored)



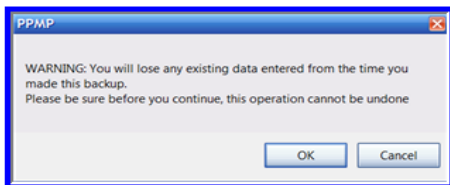
- Click on the file and Open



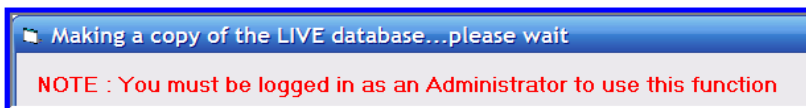
- Click Restore Database



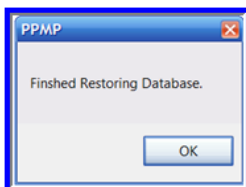
- You will get a warning to make sure you are not restoring over your current database otherwise you may lose some data
- Click Yes



- You will get another warning
- Click OK

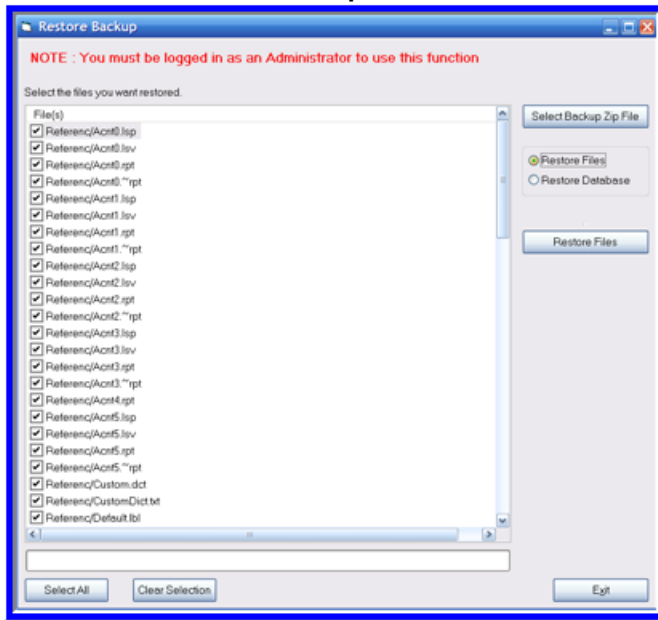


- Note – Making a copy of the Live Database

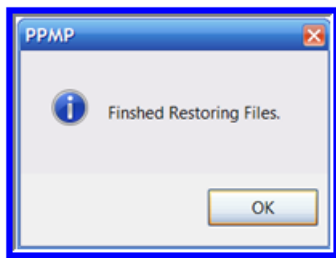


- Click OK

### Back on the Restore Backup Screen



- To restore the Files change the selection from Database to Restore Files
- Click Restore Files

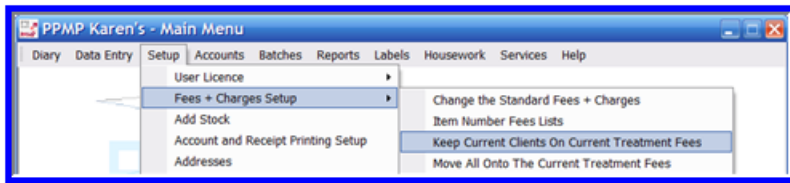


- Click OK
- Click Exit
- Close and re-open PPMP

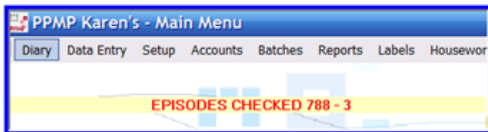
## 11 Changing fees in PPMP®

If you are wanting to keep you current clients on the current fees for little while longer

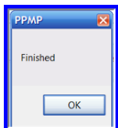
On the Main Menu



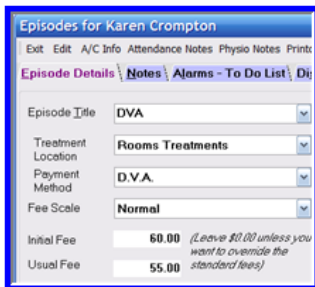
- Click Setup
- Fees & Charges Setup
- Keep Current Clients on the Current Treatment Fees



- System is adjusting fees in the client's episode screen

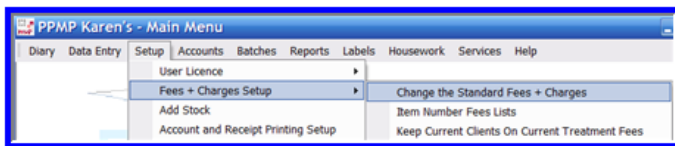


- Click OK



- Under Client Episode you will notice Initial Fee/Usual Fee have your current fees (relating to that episode)

Back on the Main Menu



- Click Setup
- Fees & Charges Setup
- Change the Standard Fees & Charges

- Go through each Payment method and change Fees
- Click Save

When you are aready to move ALL onto the new fees

- Click Setup
- Fees & Charges
- Move All onto the Current Treatment Fees

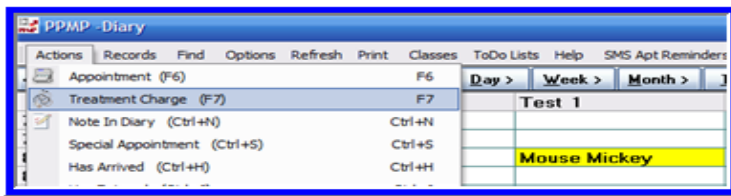
- Click Yes

- Click OK

- In the Client Episode Screen the Initial Fee/Usual Fee should now be set to Zero.

## 12 Charging an appointment

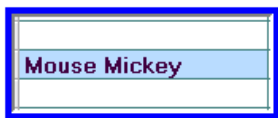
Click [HERE](#) to watch video



- Select the Client on the Diary
- Click Actions
- Select Treatment charge
- The list of your Fees & Charges will appear
- Select the correct charge

The 'Charges' dialog box is shown. At the top, it displays 'Client Name :- Mickey Mouse' and 'A/C No 20800'. Below this is a table with columns: Date, Item Code, Medicare Item#, Description, (Item Number), Fee, Normal Fee, GST, and Total. The first row shows '26/06/2013', '505', and 'Std Consultation' with a fee of 97.00. There are also fields for 'Start Time (24hr)' and 'Duration hh:mm'. A 'Standard Entries' list is visible, including 'Initial Consultation', 'Std Consultation', 'Extended Consultation', 'New Injury Consultation', and 'Re-Assessment & Treatment'. The 'Std Consultation' entry is selected. At the bottom, there are buttons for 'Accept', 'Cancel', 'Accept + Pay', 'Accept + Additional Charge', and 'Accept + More'. A 'Payment Method Used' section on the right lists options like 'CRS', 'Uninsured', 'Private', 'Workcover', 'Medicare', 'D.V.A.', 'INJURYNET', 'COMCARE', and '3RD PARTY'. The 'Private' option is selected.

- Click Accept (or Accept + Pay – you will be taken to the Payment screen)



- Once the client has been charged for their treatment, their name on the diary will change colour.



## 12.1 Cancelling a charge

Client Details window for Bart Simpson. The 'A/C Info' tab is selected in the top menu bar. The window displays various client information including Title, Gender, Client#, Phone Work, Home, Mobile, Fax, D.O.B., Date Started, Occupation, Why They Chose Us, Medical Records Details, Chart Ref, Medicare No., Medicare DVA use ONLY, Suburb, Postcode, Pensioner No., Safety Net, Health Care Card No., and Veteran Affairs No. A red arrow points to the 'A/C Info' tab in the top menu bar.

- Select the Client on the Diary and double click to open the file
- Select A/C Info
- The list of Charges billed will appear
- Select the incorrect charge and click the Cancel Entry button

Account details for Bart Simpson window. The window displays a table of charges with columns: Date, Description, Ref, GST, Debit, GST Cr, Credit, Unpaid, Balance, Printed, Episode, Practitioner, Location, and DVA Claim. A red arrow points to the 'Cancel Entry' button in the bottom right area of the window.

Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	DVA Claim
18/07/2013	PY500 - Initial Consultation	1		110.00				110.00			1 Daisy	Rooms	
19/07/2013	EFT:\$144.00 Med1 Fund ...	1				200.00		(90.00)			1 (Unspecified)		
19/07/2013	505 - Standard Consultation	1		90.00				0.00			1 Daisy	Rooms	
22/07/2013	505 - Standard Consultation	1		90.00			90.00	90.00	26/09/2013		1 Daisy	Rooms	
24/07/2013	505 - Standard Consultation	1		90.00			90.00	180.00	26/09/2013		1 Daisy	Rooms	
02/08/2013	500 - Initial Consultation	1		110.50			110.50	290.50	26/09/2013		1 Donald	Rooms	
06/09/2013	505 - Standard Consultation	1		90.00			90.00	380.50	26/09/2013		1 Daisy	Rooms	
26/09/2013	500 - CANCELLED : Initial...	1						380.50	26/09/2013		1 Donald	Rooms	
26/09/2013	Account printed. No 5.	ACT						380.50	26/09/2013		1 (Unspecified)	Rooms	
27/09/2013	500 - Initial Consultation	1		0.00			110.00	490.50			1 Daisy	Rooms	

Activity Summary table:

	Charges	Payments	No of Rx's
All	690.50	-200.00	7
YTD	690.50	-200.00	7
MTD	200.00	.00	2

DELETE AN ACCOUNT ENTRY dialog box. The dialog asks: "Are you SURE you want to CANCEL this entry?". There are 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button.

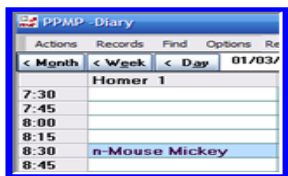
- Click Yes if you are sure you want to cancel this entry

Date	Description	Ref	GST	Debit
18/07/2013	PY500 - Initial Consultation	1		110.00
18/07/2013	EFT:\$144.00 Med'I Fund ...	1		
19/07/2013	505 - Standard Consutation	1		90.00
22/07/2013	505 - Standard Consutation	1		90.00
24/07/2013	505 - Standard Consutation	1		90.00
02/08/2013	500 - Initial Consultation	1		110.50
06/09/2013	505 - Standard Consutation	1		90.00
26/09/2013	500 - CANCELLED : Initial...	1		
26/09/2013	Account printed. No 5.	ACT		
27/09/2013	500 - CANCELLED : Initial...	1		

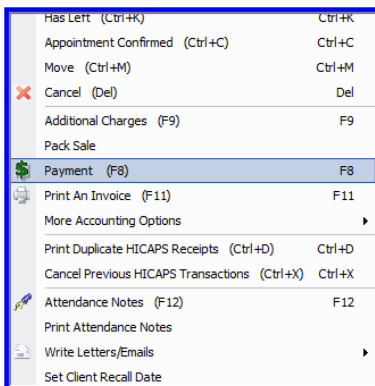
- The cancelled entry will now appear in the list.  
**NB:** Charges and Appointments cannot be removed from the diary due to auditing/security purposes – this will not affect reports, statistics etc.

## 12.2 Receipting a payment

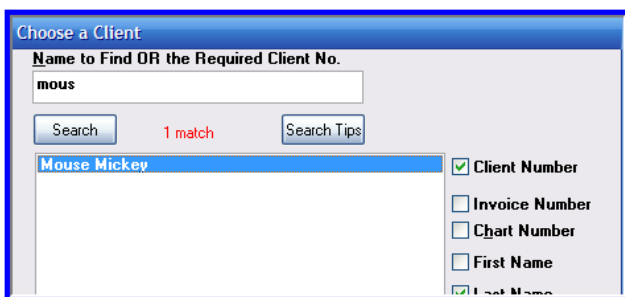
Click [HERE](#) to watch video



- If the client making the payment is already on the diary select that appointment.



- Click Actions
- Click Payment



- If you didn't choose an appointment choose a patient from the patient list.

Choose A Client Episode

(No Episode Selected)

General  
General  
Test  
Neuro

Ok  
Cancel

- If necessary choose the episode the payment is for

Payment

Client No. 20818 Episode General

Name

Date	Description	Amount	Unpaid	Paying	Practitioner	DVA Claim(d)s
22/06/2012	500 Initial Consultation JM	115.00	115.00	115.00	Sam	
02/10/2012	500 Initial Consultation AF	999.00	999.00	999.00	John	
02/10/2012	Air Disc Balance Exercises	9.05	9.05	9.05	John	

Totals 1123.05 1123.05

Discount Entry by

Edit Entry Paying Some HICAPS Medicare  
Print Account Paying All Claim HICAPS Medicare DVA Claim  
EFTPOS Payment Quote HICAPS Cancel HICAPS Transactions Claim Medicare Edit

- Click Paying All (if total amount outstanding is being paid)
- Or Click in Paying field and type in amount being paid
- Click Paying Some

Payment

Client No. 20818 Episode General

Name

Payment Details

DEPOSIT AVAILABLE : \$0.00

Drawer	Bank/Card	Branch	Payment Type	Amount
			Cash	
			Cheque	
			Credit Card	
			Discount	
			Deposit	
			Other	
			EFT	\$1,123.05
			Medical Fund Direct	
			Direct Deposit	
			Medicare	

Total so far 1123.05  
Total required 1123.05  
Deposit paid in today

☐ Preview Report?

Print Receipt (normal) Print Fully Itemised Accept But Don't Print Go Back Cancel

Receipt layout printed  
Normal Receipt ☒ Re-use for this client next time Change the receipt message

- Enter amounts being paid and how they paid

☐ Preview Report?

Print Receipt (normal) Print Fully Itemised Accept But Don't Print Go Back Cancel

Receipt layout printed  
Normal Receipt ☒ Re-use for this client next time Change the receipt message

Total so far 630.00  
Total required 630.00  
Deposit paid in today

- Print a receipt (normal or fully itemised) if required
- Or accept but don't print

## 13 [Class Packs](#)

The class pack system is designed to automate the process of pre-selling a number of visits (usually but not necessarily a class of some kind), then using these up as the client attends, warning when they have run out, and to manage the payment for the class pack.

### 13.1 [The Basics](#)

You sell a pack to a client, as they attend; the system takes an unused pack item and puts it in the billing window. If accepted it is transferred to the used list.

If such a client has run out of pack items you will be asked if you wish to bill them for another pack before moving on to the usual charging window.

When you do bill a pack, you don't have to record a payment at that time, the payment can be done at any time just as for other charges. IE the pack doesn't have to be paid for to use items from it.

So that the program can tell if a client is using class packs, you set up one (or more) of your Payment Methods as a class pack Payment Method.

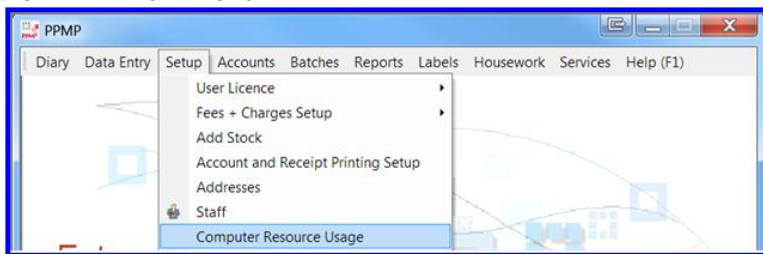
In the client's episode you select this Payment Method. The system will then expect to find unused pack items in the file, and if it doesn't find any it will ask you if you (optionally) want to sell them another one.

### 13.2 [Setting Up](#)

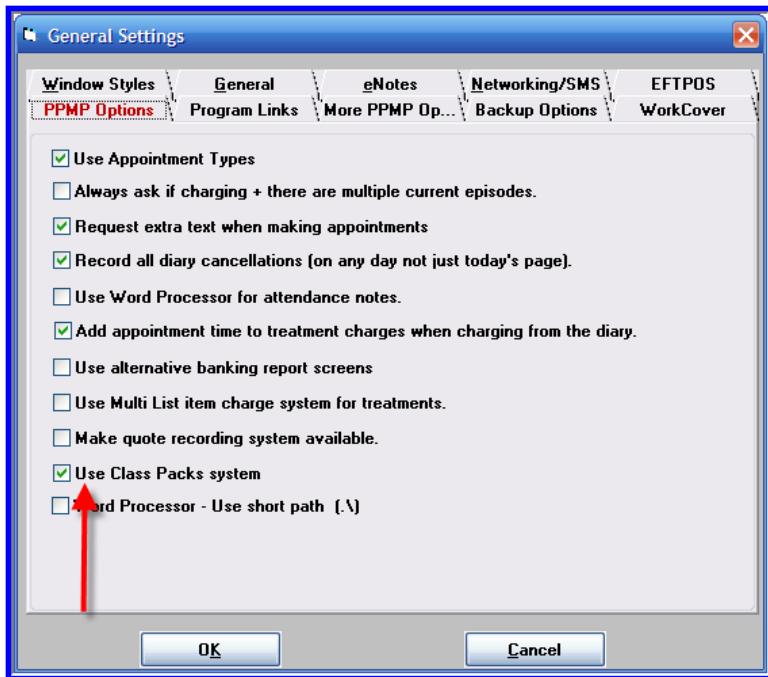
**There are two parts to setting up.**

#### **Initializing the Class Packs**

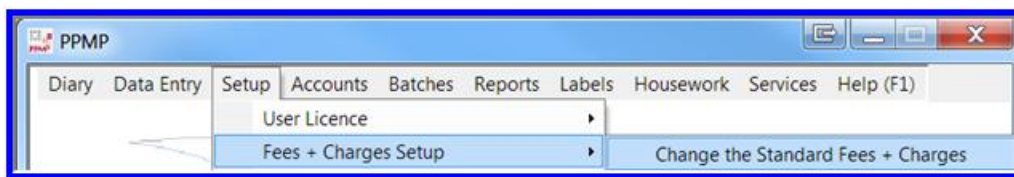
On the PPMP Main Menu



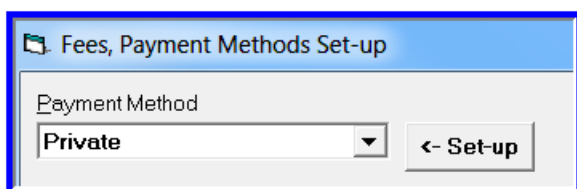
- Click Setup
- Computer Resource Usage



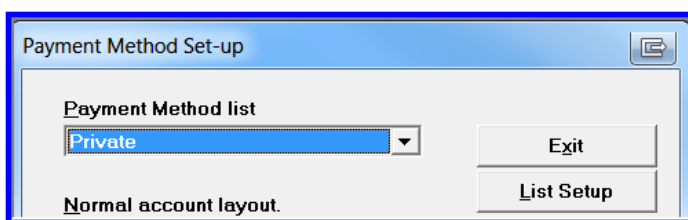
- Click PPMP Options
- Tick Use Class Packs System
- Click OK
- Close PPMP & Reopen
- Marking a Payment Method as a Class Pack Payment Method
- On the PPMP Main Menu



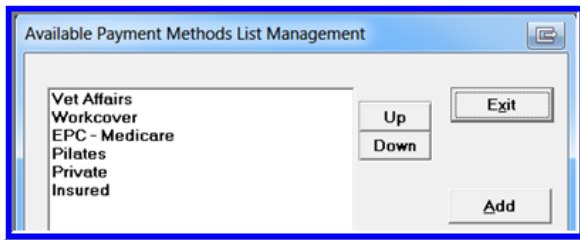
- Setup
- Fees + Charges setup
- Change the standard fees + charges.



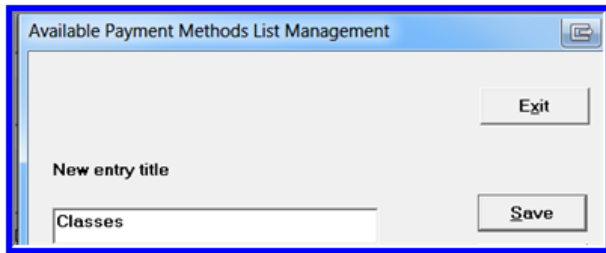
- Click on the Setup button beside the Payment Method List



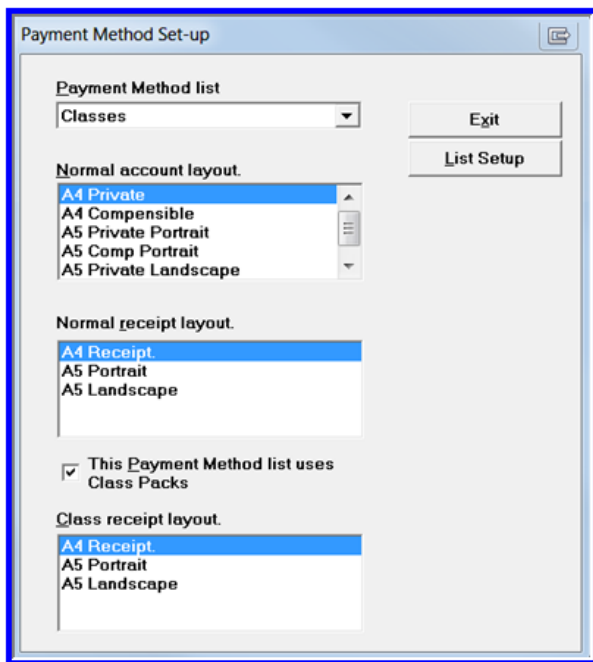
- Click on List Setup



- Click Add



- Fill in the New Entry Title
- Click Save & Exit
- On the Payment Method Setup screen



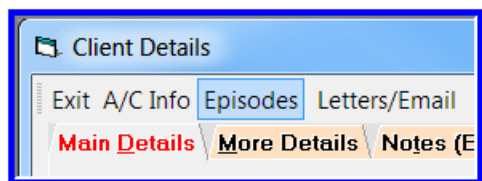
- Select your class payment method
- Select the Account Layout
- Select the Receipt Layout
- Tick this Payment Method list uses Class Packs
- Select a Class Receipt layout
- Exit & Save changes

- Choose your Class Payment Method
- Click Add New

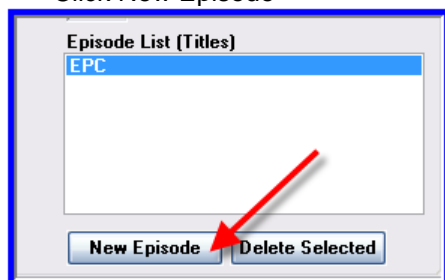
- Enter your Class Pack fees
- Tick is a Class Pack Item
- Fill in Class Attendance Description, Item Code & No. Required
- Click Save
- Continue until all Class Pack Items have been entered
- Click Exit

### 13.3 Before selling packs

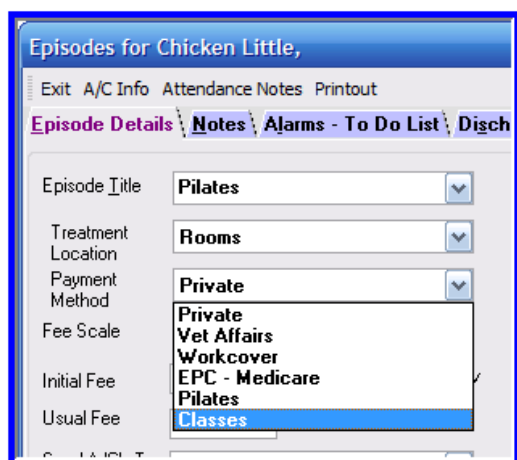
You need to set up a new Episode for Class Packs



- Go to the Client's Episode screen
- Click New Episode



- Name the episode in Episode Title



- Click Payment Methods and Select Class Payment Method
- Exit
- Save the Changes

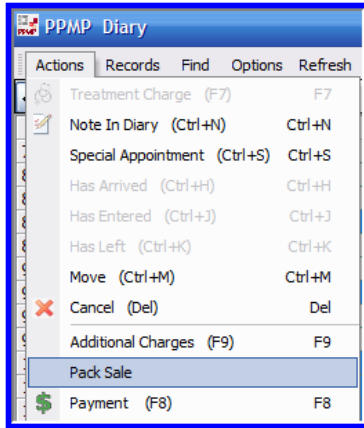
**You are now ready to sell a Pack**



### 13.4 Selling packs

#### New Sale

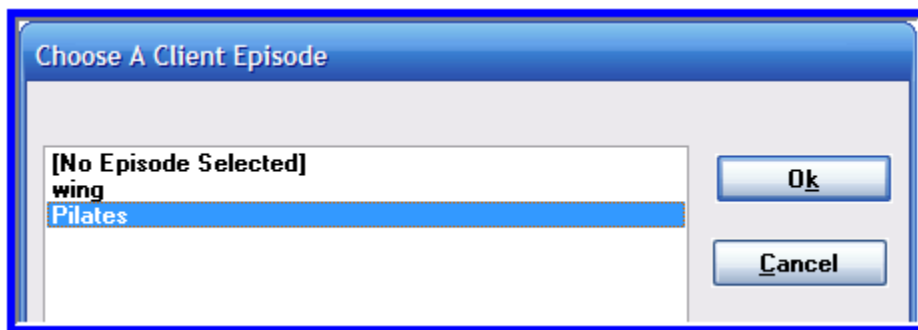
On a **BLANK SPOT** on the Diary



- Click Actions
- Pack Sale



- Choose a Client
- Select the appropriate episode



- Click OK

**Charges Pack**

☐ Add GST

Date	Description	(Item Number)	Fee	Normal Fee	GST	Total
05/03/2015	Class Pack - 10		200.00	200.00	0.00	200.00

Code: CP10  
 Class Attendance Description: Pilates Class - 560  
 No Req: 10  
 Expiry Date: 01/01/2016

Standard Entries:  
 Class Pack - 10  
 Class Pack - 5

Buttons: Accept, Edit, Cancel, Accept + More, Accept + Pay

- Select the Pack from the available packs list.
- Enter an Expiry date (This is optional)

Buttons: Accept, Edit, Cancel, Accept + More, Accept + Pay

Type of charge: Treatments  
 Treatment location: Rooms, Hospital, Home Visits  
 Practitioner: Donald Duck  
 Fees scale: Normal  
 Patient episode involved: Pilates

Buttons: Start a new episode, View Client Record

- Ensure all details are correct. **E.G.** Type of Charge, Location, Practitioner
- Click Accept or Accept+Pay
- Make Payment for the pack as you would normally take a payment

**NB:** Health Insurance Claims **cannot** be completed at this time.

**Payment**

Client No. 14  
 Name: Little, Chicken :Pilates  
 Episode: Pilates

Date	Description	Amount	Unpaid	Paying	Practitioner	ClaimId/Batch
05/03/2015	Class Pack - 10	200.00	200.00	200.00	Donald	

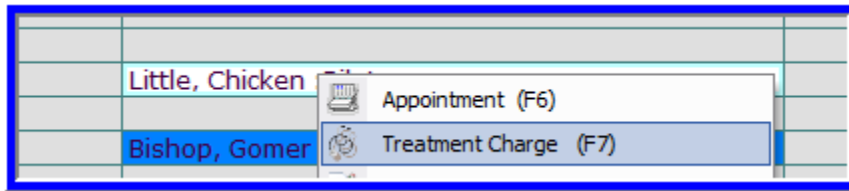
Totals: 200.00 200.00

Buttons: Discount Entry, Edit Entry, Print Account, Paying Some, Paying All, Medicare DVA Claim, Tyro Healthpoint, Tyro Healthpoint Cancellation, Tyro EFTPOS, Tyro EasyClaim, Calculate Gap Payment, Exit

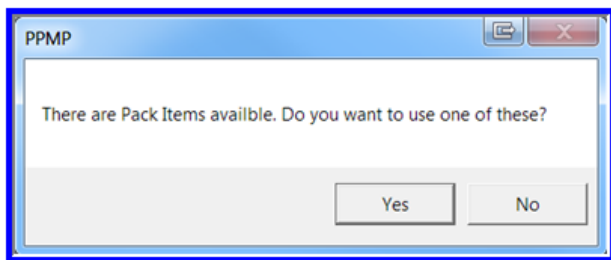
### 13.5 Using pack items

To use one of these items

- Select client appointment on the diary (make sure the appointment has been made using the correct episode/payment method).



- Click Actions or Right Click
- Click Treatment Charge



- Click Yes

**Charges**

Client Name :-Chicken Little, A/C No 14

Date: 05/03/2015 Description: Pilates Class - 560 Fee: 20.00 GST: 0.00 Total: 20.00

Reverse GST status - keep same total charge

Pack Items Available : 10

Issued	Description	Value	GST
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00
05/03/2015	Pilates Class - 560	20.00	0.00

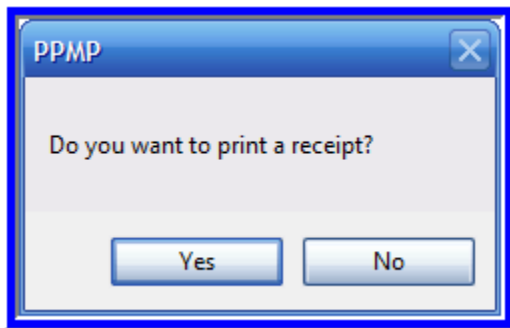
Receipt: A1 Receipt, A5 Portrait, A5 Landscape

Accept Cancel

Type of charge: Treatments Treatment location: Rooms, Hospital, Home Visits Practitioner: Donald Patient episode involved: Pilates

View Client Record Payment Method Used

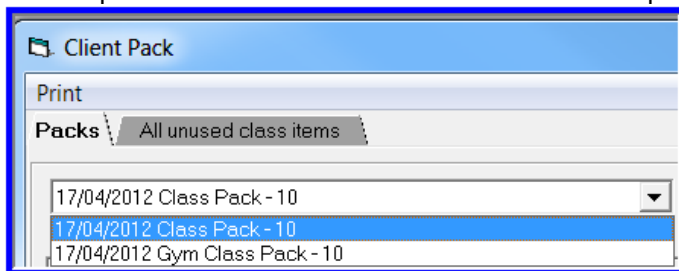
- A pack item from the clients file will be automatically entered into the charge window (the oldest on file will be selected).
- Click Accept



- **Click Yes**  
(If you do not print the receipt now you will not be able to print later)

### **13.6 Using a different pack item**

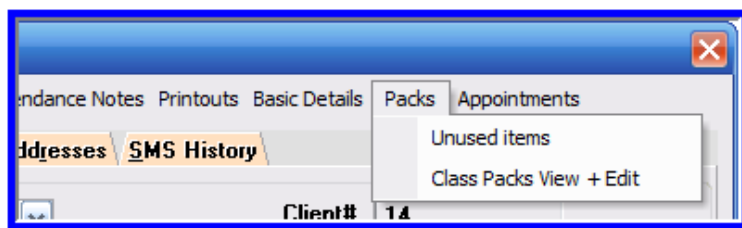
- It is possible for a client to have more than 1 class pack at any given time



- If you want to use a particular unused pack item scroll down the Pack Item list and click on the particular item you want and click Accept
- You might need to do this where you have sold multiple packs such as normal Class and Gym class. The system might pre-load a normal class item when you want a Gym class item.

**This would indicate that the appointment was made selecting the wrong episode**

### **13.7 Viewing client usage & status**



- Go to the client's record
- Click on Packs on the menu
- Choose "Unused items"

Client Pack

Print

**All unused class items**

Unused items = 19

Date	Pack No	Description	Fee	Line No	Code	Expiry Date
17/04/2012	2	Class Pack - 10	\$50.00	2		
17/04/2012	2	Class Pack - 10	\$50.00	3		
17/04/2012	2	Class Pack - 10	\$50.00	4		
17/04/2012	2	Class Pack - 10	\$50.00	5		
17/04/2012	2	Class Pack - 10	\$50.00	6		
17/04/2012	2	Class Pack - 10	\$50.00	7		
17/04/2012	2	Class Pack - 10	\$50.00	8		
17/04/2012	2	Class Pack - 10	\$50.00	9		
17/04/2012	2	Class Pack - 10	\$50.00	10		
17/04/2012	3	Gym Class Pack - 10	\$50.00	1		
17/04/2012	3	Gym Class Pack - 10	\$50.00	2		
17/04/2012	3	Gym Class Pack - 10	\$50.00	3		
17/04/2012	3	Gym Class Pack - 10	\$50.00	4		
17/04/2012	3	Gym Class Pack - 10	\$50.00	5		
17/04/2012	3	Gym Class Pack - 10	\$50.00	6		
17/04/2012	3	Gym Class Pack - 10	\$50.00	7		
17/04/2012	3	Gym Class Pack - 10	\$50.00	8		
17/04/2012	3	Gym Class Pack - 10	\$50.00	9		
17/04/2012	3	Gym Class Pack - 10	\$50.00	10		

- Brings up all unused items available for use

Client Details

Exit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs Appointments

Main Details More Details Notes (Empty) More Addresses SMS History

Unused items

Class Packs View + Edit

- Alternatively Click Class Packs View & Edit

Client Pack

Print

**Packs** All unused class items

17/04/2012 Class Pack - 10

Listed Newest pack to oldest.

Date	Pack No	Description	Fee	Line No	Code	Expiry Date
17/04/2012	2	Class Pack - 10	\$50.00	2		
17/04/2012	2	Class Pack - 10	\$50.00	3		
17/04/2012	2	Class Pack - 10	\$50.00	4		
17/04/2012	2	Class Pack - 10	\$50.00	5		
17/04/2012	2	Class Pack - 10	\$50.00	6		
17/04/2012	2	Class Pack - 10	\$50.00	7		
17/04/2012	2	Class Pack - 10	\$50.00	8		
17/04/2012	2	Class Pack - 10	\$50.00	9		

**Used Items**

Date	Description	Ref No	Group Line	Pack Fee
17/04/2012	Class Pack - 10	2	1	\$50.00

Delete item Cancel item Usage Add new item Edit pack line Delete this pack

- You have full access to all the packs and be able to adjust or change them

Episode: All Episodes      Unpaid Total : \$300.00      Net A/C Bal : \$300.00  
 Client#: 14      Deposit Held : \$0.00      GST Bal : \$0.00

Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	Claim/E
06/02/2015	5001 - Standard Consultati...	1		201.00				201.00			1 Donald	Rooms	
17/02/2015	5001 - Standard Consultati...	1		201.00				402.00			1 Donald	Rooms	
17/02/2015	TYRO Healthpoint:\$100	57				100.00		302.00			1 (Unspecified)		
17/02/2015	TYRO EFT:\$101.00	58				101.00		201.00			1 (Unspecified)		
17/02/2015	TYRO Healthpoint:\$100	59				100.00		101.00			1 (Unspecified)		
17/02/2015	TYRO EFT:\$101.00	60				101.00		0.00			1 (Unspecified)		
17/02/2015	5001 - Standard Consultati...	1		201.00				201.00			1 Donald	Rooms	
17/02/2015	Chg:\$201.00	61						0.00			1 (Unspecified)		
05/03/2015	Class Pack - 10	5		200.00				200.00			2 Donald	Rooms	
05/03/2015	Cancelled - Rebooked - 0...	Cnl						200.00			1 Donald Duck	Rooms	
05/03/2015	Cash:\$200.00	88				200.00		0.00			2 (Unspecified)		
05/03/2015	Pilates Class - 560	5						0.00			2 Donald	Rooms	
05/03/2015	GYM Class - 10 Pack (6...	7		300.00				300.00			2 Y Renoux	Rooms	
05/03/2015	Cancelled :- Cash:\$300.00	90						300.00			2 (Unspecified)		
05/03/2015	Receipt 90 Cancelled							300.00			2 (Unspecified)		
05/03/2015	Cancelled :- Cash:\$300.00	90						300.00			3 (Unspecified)		
05/03/2015	Receipt 90 Cancelled							300.00			3 (Unspecified)		
05/03/2015	Cash:\$300.00	90				300.00		0.00			2 (Unspecified)		
05/03/2015	GYM Class - 10 Pack (6...	8		300.00				300.00			3 Donald Duck	Rooms	

Activity Summary

	Charges	Payments	No of Rx's
All	1878.01	-1578.01	8
YTD	1403.00	-1103.00	3
MTD	800.00	-500.00	

Buttons: View, A/C History Print, Credit, View Entry in Detail, Print Payment Summary, Attendance History, Print A/C, Exit

- Or you can go to a client's Account history screen
- Click on a pack item
- Click the View button
- You will be taken to the Client Pack screen where you can make adjustments or edit pack information

Client Pack

Print

Packs / All unused class items

- The Tabs at the top "Packs" / "All unused class items" shows you all pack items and what is still available
- When a Class Pack is Finished
- When a client is on a Pack Item Payment Method and there are no unused pack items in their file

Charges

Client Name : Mickey Mouse      A/C No 18

Date: 31/05/2012      Description: Class Pack - 10      (Item Number):      Fee: 500.00      Normal Fee: 500.00      GST: 0.00      Total: 500.00

Item Code: CP10      ☐ Add GST      Reverse GST status - keep same total charge

Medicare Code:      Start Time (24Hr Clock):      Standard Entries: Class Pack - 10, Gym Class Pack - 10, Pilates - 10 Pack      ☒ Always show standard entries

Duration hh:mm:     

Type of charge: Treatments      Treatment location: Rooms, Hospital, Home Visits      Practitioner: ME Aswell (Not Emp)      Patient episode involved: Class

Fees scale: Normal     

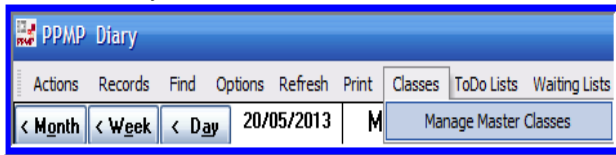
As you try to treatment charge, a new class pack will be available to select

**HIGHLY RECOMMENDED TO CANCEL** – and sell the pack through the Pack Sale option – Actions or right click on a blank spot – otherwise the name on diary will change color (because it has been charged) and you will not be able to use an item from the pack.

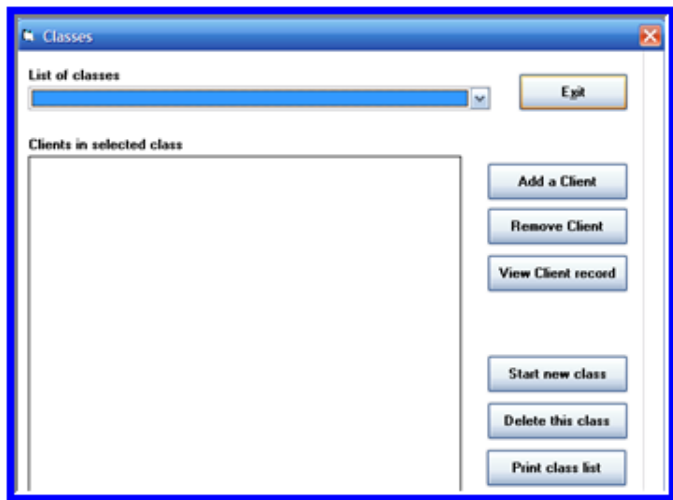
And after the sale return to the Diary and charge as usual

### 13.8 Classes – Setup new class

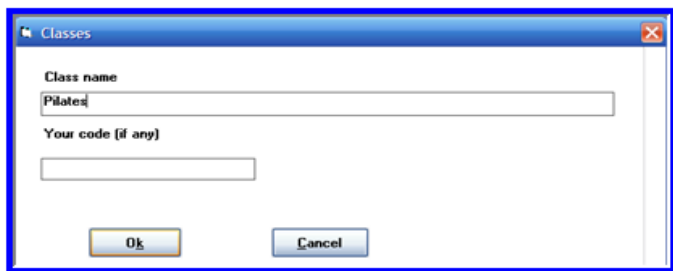
From the diary



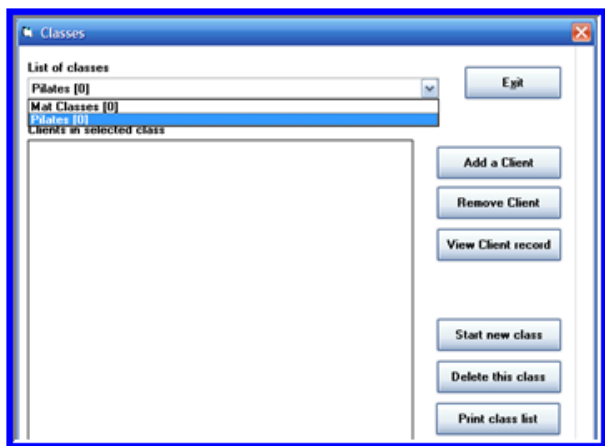
- Click Classes
- Manage Master Classes



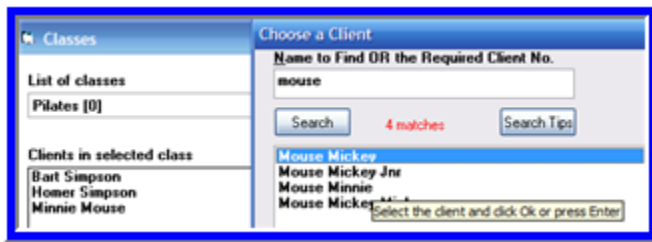
- Click Start New Class



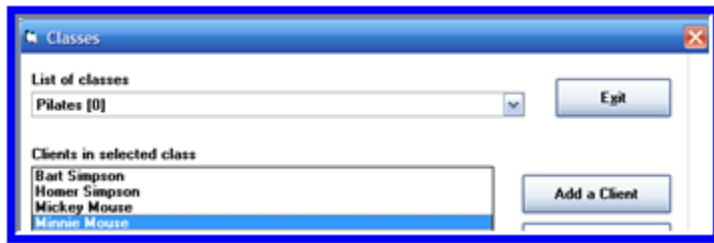
- Give Class a Name – Click OK



- Click on Drop Down button and select Class
- Click Add a Client



- Select Client & Click OK

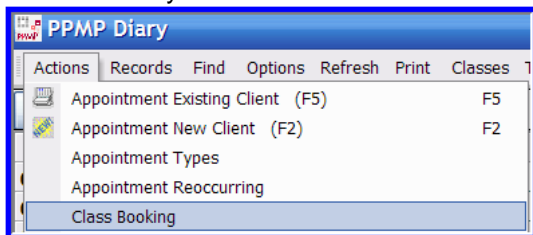


- When you have finished adding clients - Click Exit

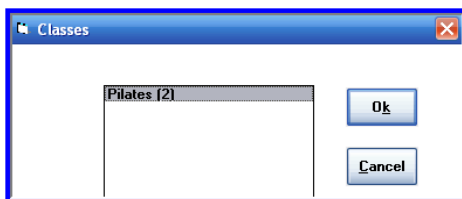
### 13.9 Classes – Make class appointments

**NB:** When making changes to classes a new class will be added – this is so people can be added and removed from a class on a particular day instead of having to delete and add back into future classes

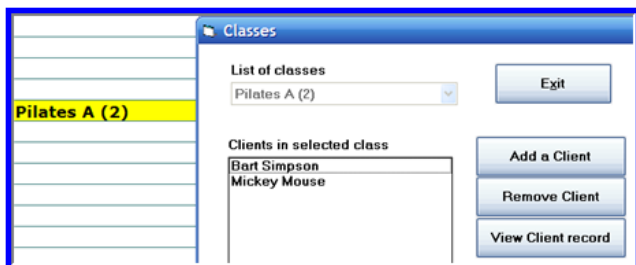
From the Diary



- Click Actions ( or Right Click on the diary)
- Select Class Booking



- Select the class
- Click OK



- The number in brackets indicates how many people are in the class



### 13.10 Classes – Treatment charges

**Pilates (2)**

- Highlight class – the number indicates how many booked in the class

**Pilates (2)**

Appointment (F6)

Treatment Charge (F7)

- Click Actions or Right Click
- Click Treatment Charge

Classes

Pilates 21/05/2013

☐ Bart Simpson (P)

☐ Mickey Mouse (P)

Ok

Print list

View client record

Press the space bar to mark/unmark a patient, or click on the check box beside the name.

- Click in the box next to name

Choose A Client Episode

[No Episode Selected]

General

Test 1

**Pilates**

- Select episode (if prompted)

Charges

Client Name: Bart Simpson A/C No 7

Date: 21/05/2013 Item Code: 505 Medication Item: Standard Consultation (Item Number): Fee: 75.00 Normal Fee: 75.00 GST: 0.00 Total: 75.00

Start Time (Dth): Duration Min: Add GST Reverse GST status - keep same total charge

Click For Medicare Benefit Schedule (MBS)

Standard Entries

Initial Consultation

General Consultation

Basic Initial Consultation

Accept Cancel Accept + Pay Accept + Additional Charge Accept + More

- Click Accept

Payment

Client No: 39 Episode: Mickey Mouse

Date	Description	Amount	Unpaid	Paying	Practitioner	Drk Chkd(R)
21/05/2013	Initial Consultation	75.00	75.00			
21/05/2013	Standard Consultation	75.00	75.00			

Unpaid Total: 150.00

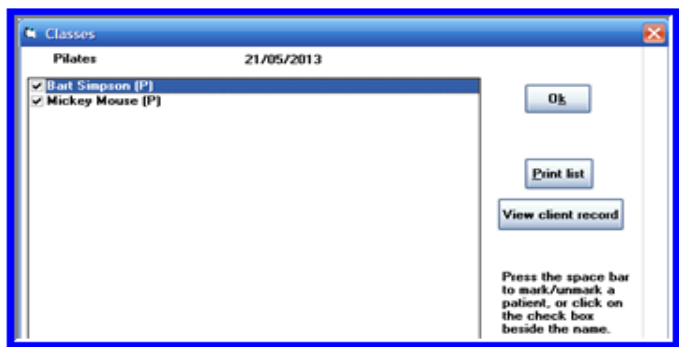
Payment Total: 150.00

Medicare

Medicare Dth Chkd

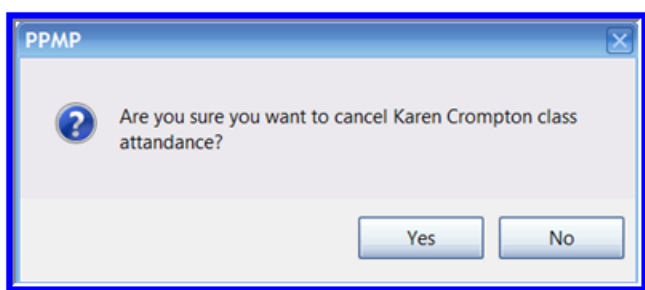
Exit

- Proceed with Payment as usual (if not paying Click Exit)



- Repeat until all class attendees have been treatment charged
- Click OK

**NB: If you need to cancel a treatment simply click on the tick next to their name**



- Click Yes
- The charge has now been removed from their account information.

## 14 [Client records on PPMP](#)

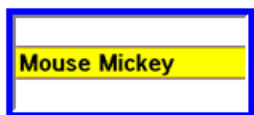
### 14.1 [Adding a new client to the computer](#)

Click [HERE](#) to watch video

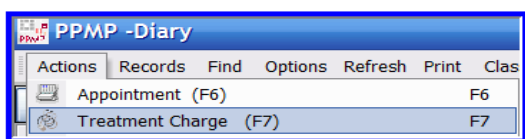
A new client can be added to the system in four ways.

This is the most common approach, (the program detects that they are a new patient and requires their details to be entered before continuing)

#### **The First Option**

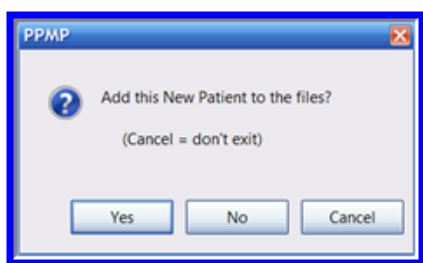


- Click on the appointment for a new client on the diary

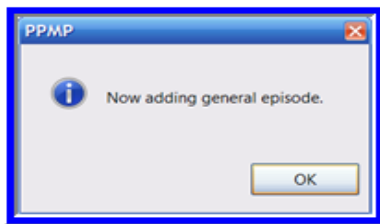


- Click Actions
- Click Treatment Charge

- Fill in client details (see – Entering Client Details below)
- Click Exit



- Click Yes



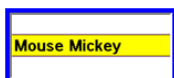
- Click OK

- Fill in the episode details
- Click exit
- Save the changes

- Proceed with the treatment charge

### **The Second Option**

This approach is used when you want to fill in the new patient's details before you record their first treatment or are ready to make another appointment for them.

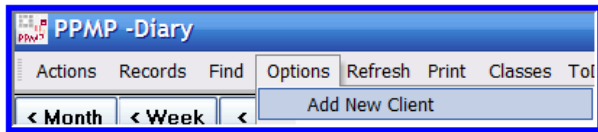


- Selecting the New Patient's appointment on the diary.

- Click on Options
- Click Add a New Client
- Proceed as in Option 1

### **The Third Option**

Without selecting a new patient's appointment.  
From the diary

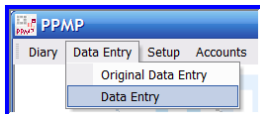


- Click Options
- Click Add a New Client
- This brings up the Client Details screen
- Proceed as in Option 1

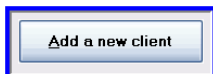
### **The Fourth Option**

Add a New Client Using Data Entry system

- On the Main Menu PPMP®



- Click Data Entry
- Click Data Entry



- Select Add New Client
- Enter the Client details
- You normally don't add a new client until the new client actually turns up for their visit, to avoid having client files for clients who never actually attended

**NB:** You can't record a treatment or make a subsequent appointment without adding the patient to the patient file. You only need to fill in client's name to proceed – you can then go back and fill in other necessary information.

## **14.2 Entering client details**

Click [HERE](#) to watch video

The information on a client is divided into three main sections.

### **MAIN RECORD**

- Their main Client Details such as Name, Address, DOB. Contact phone numbers, etc.

## EPISODES

- Details of a particular problem what they are being treated for. Such as what the problem is, who referred them, payment method, treatment location, fees scale used, claim numbers, notes, etc.

## ACCOUNT HISTORY

Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	TAC Status
05/06/2013	500 - Initial Consultation	1		115.00			115.00	115.00		2	Sam	Rooms	
12/06/2013	505 - Std Consultation	1		97.00			97.00	212.00		2	Sam	Rooms	
19/06/2013	514 - Extended Consultation	1		132.00			132.00	344.00		2	Sam	Rooms	
26/06/2013	505 - Std Consultation	1		97.00			97.00	441.00		2	Sam	Rooms	

	Charges	Payments	No of Rx's
All	441.00	.00	4
YTD	441.00	.00	4
MTD	441.00	.00	4

- Attendance records along with charges levied and payments received.
- Each client has only one main record, but they might over time accumulate several different episodes.
- Each entry in their account history is associated with one and only one of the episodes.
- You can have more than one patient episode active for a patient at the same time.
- Each episode is handled separately as far as issuing accounts and receipts is concerned.
- They might have a private episode and a Compensable episode being treated and billed simultaneously.

**It pays to fill in the Client Records.**

## **GET INTO THE HABIT OF FILLING IN THE PATIENTS ADDRESS IMMEDIATELY.**

Most practices find in the long term that it pays to fill in all relevant information (you only have to do it for the patient's first visit) further down the track you may want to take advantage of the reporting capabilities of the system, but they are dependent on the information you have entered.

You will find it frustrating if you use the automatic print accounts option only to find many of them don't have an address on them.

- Client's main record screen

- There are several pages to record extra information like names and other addresses, notes, etc. You can also access the patient's episode details and account history from here.

### 14.3 Client episode details

- The client episode details window

- Each time a client attends for treatment for a new problem, you should start a new EPISODE for them.
- Each episode has a title, typically the problem being treated, and its own set of details. (e.g. Payment method, Treatment location, Fees scale, Presenting problems, Claim numbers, Date of accident, Send accounts to setting, Referred by & usual practitioner.)

- You don't have to fill in all of these entries, just those of interest to you apart from an episode title & the payment method & treatment location.

- There is also a provision for notes.

#### 14.4 To start a new episode

- Click on Start a New episode

- Episode title** - Use a title so that when the client has been for more than one problem you can easily identify which is which.

- If you click the Account information button here, you will only see the account history entries that relate to the currently displayed episode.

#### **Initial and standard fees.**

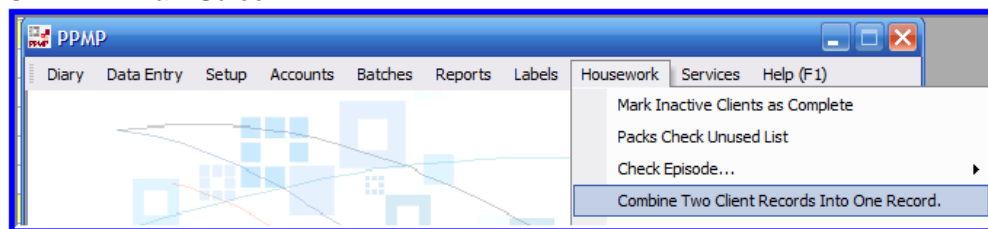
**NB:** These should be left \$0.00 unless you want a special fee charged on a regular basis for this particular patient, which isn't already covered by your standard fees.



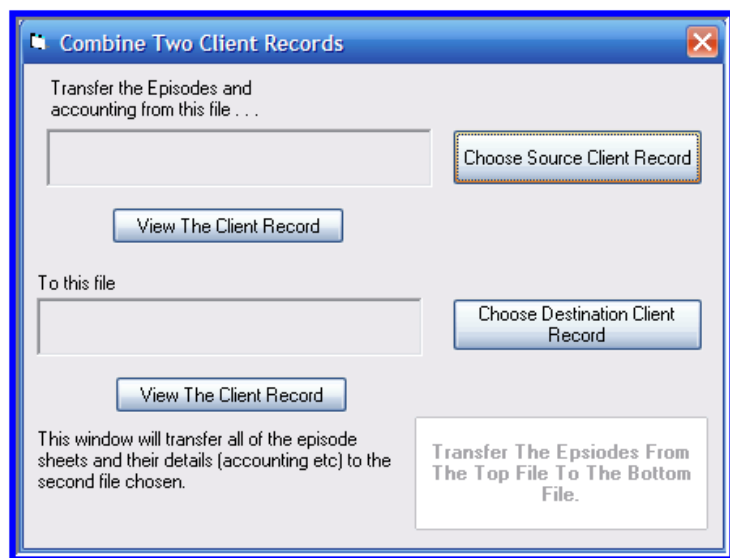
- **Alarms By number of treatments** - If you enter a number of approved treatments, the client's appointments will display in a different color with a number in brackets – this number indicates the amount of treatments left before they reach their approved number of treatments.
- If you also include a date then the number of treatments must occur by this date.
- The appointment alarm window will appear when appointments are made after this date and the client's name will show up on a red background when an appointment for them is made on the diary.

## 15 Combine 2 client records into one

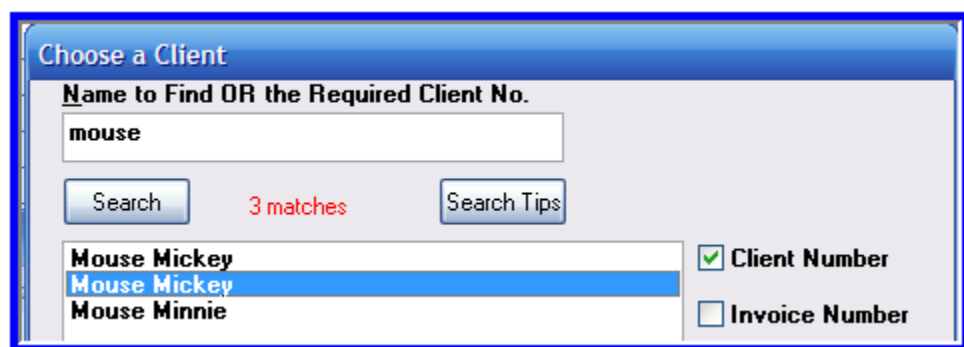
On PPMP Main Screen



- Go to Housework
- Click on Combine Two Clients Records into One Record



- Click on Choose Source Client Record



- Select the file to transfer **FROM**

**Combine Two Client Records**

Transfer the Episodes and accounting from this file . . .

**Mouse, Mickey Client No. 36**

Choose Source Client Record

View The Client Record

To this file

Choose Destination Client Record

View The Client Record

This window will transfer all of the episode sheets and their details (accounting etc) to the second file chosen.

**Transfer The Episodes From The Top File To The Bottom File.**

- Click Choose Destination Client Record

**Choose a Client**

Name to Find OR the Required Client No.

mouse

Search 3 matches Search Tips

Mouse Mickey  
Mouse Mickey  
Mouse Minnie

☒ Client Number  
☐ Invoice Number

- Select the file to transfer **TO**

**Combine Two Client Records**

Transfer the Episodes and accounting from this file . . .

**Mouse, Mickey Client No. 36**

Choose Source Client Record

View The Client Record

To this file

**Mouse, Mickey Client No. 32**

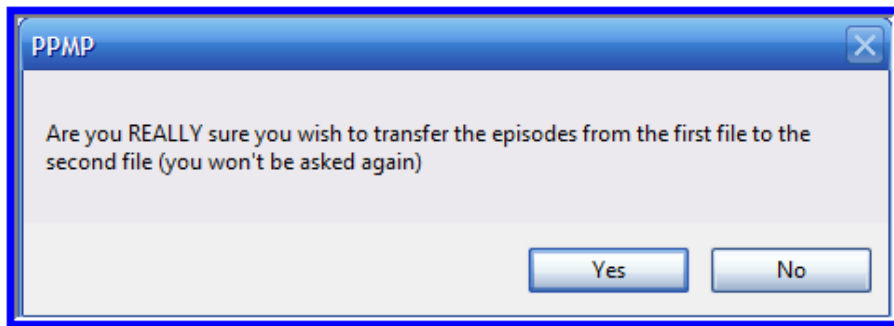
Choose Destination Client Record

View The Client Record

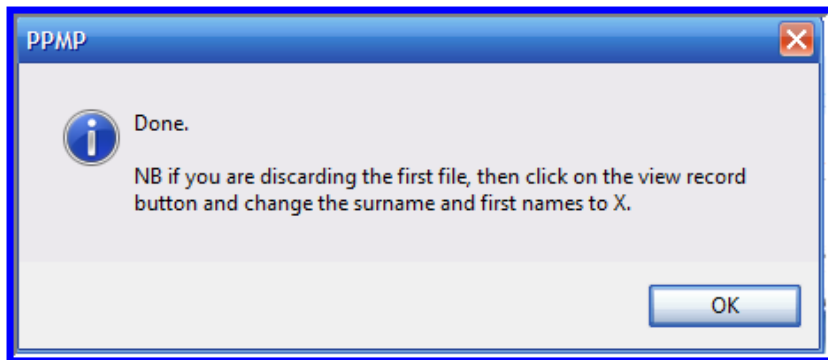
This window will transfer all of the episode sheets and their details (accounting etc) to the second file chosen.

**Transfer The Episodes From The Top File To The Bottom File.**

- Click Transfer the Episodes **FROM THE TOP FILE** to **THE BOTTOM FILE**
- Make sure you have selected the correct files



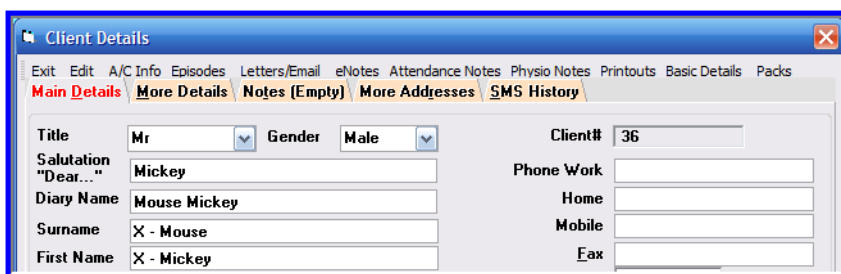
- Click Yes if you are sure (**ONLY IF YOU ARE VERY SURE** – this stage cannot be reversed)



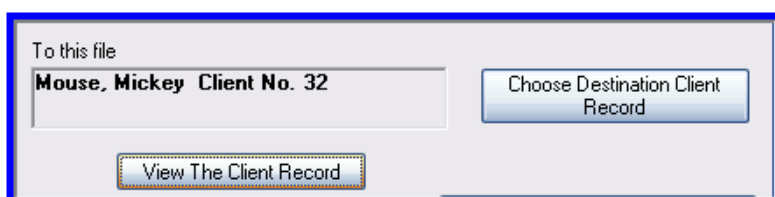
- Click OK



- Click on View the Client Record



- Insert X before Surname/Firstname (you can remove the surname/firstname and just leave X)
- Click Exit and Save Changes



- View the Destination Record (to make sure Episode and Accounting Information is correct)
- Exit

## 16 Credits / Refunds

**Client Details**

Exit Edit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs Appointments

**Main Details** More Details Notes (Empty) More Addresses SMS History

Title  Gender  Client#

Salutation "Dear..."  Phone Work

Diary Name  Home

Surname  Mobile

First Name  Fax

Middle Name  D.O.B.

- Open Client Details Screen
- Click A/C Info

**Account details for Mickey Mouse**

Episode  Unpaid Total : \$0.00 Net A/C Bal : \$0.00

Client No.  Deposit Held : \$0.00

GST Bal : \$0.00

Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	TAC Status
01/03/2013	500 - Initial Consultation	1		100.00				100.00		1	Homer	Rooms	
21/05/2013	Cash:\$100.00	159			100.00		0.00			1	(Unspecified)		

To work on an entry click on it first.

- Click on the Treatment Charge

☐ Hide Adjustments

☐ Show class packs only

View/Reprint

Quotes on File A/C History Print Credit

View Entry in Detail Print Payment Summary

Attendance History Print A/C Exit

**Activity Summary**

	Charges	Payments	No of Rx's
All	100.00	-100.00	1
YTD	100.00	-100.00	1
MTD	.00	-100.00	

- Click Credit Button

**Credit Adjustment**

Credit Adjustment

Credit/Refund Type:

Credit Amount:

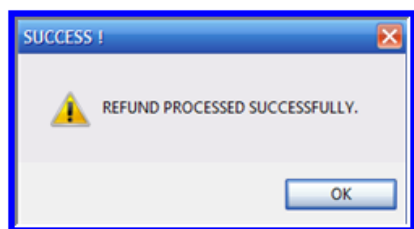
Max Credit Amount:

Comments:

Refund

Refund Cancel

- Select Credit/Refund Type
- Enter amount being refunded
- Enter comment relating to refund (e.g. why it is being refunded)
- Click Refund



- Refund Processed Successfully
- Click OK
- Exit

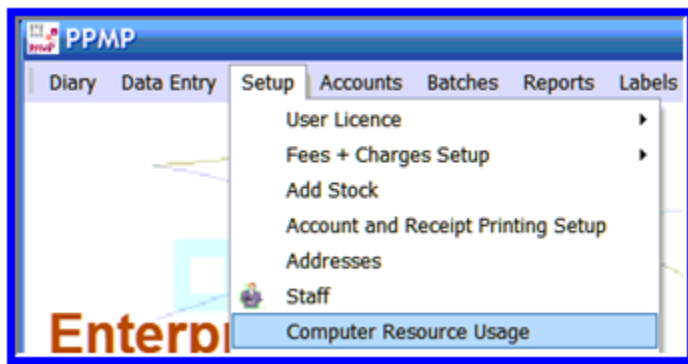
Account details for Mickey Mouse													
Episode	All Episodes			Unpaid Total : \$0.00				Net A/C Bal : \$0.00					
Client No.	39			Deposit Held : \$0.00				GST Bal : \$0.00					
Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	TAC Status
01/03/2013	500 - Initial Consultation	1		100.00				100.00		1	Homer	Rooms	
21/05/2013	Cash: \$100.00	159				100.00		0.00		1	(Unspecified)		
21/05/2013	PAYOUT : \$100.00, Refu...	CRD				100.00		(100.00)		1	Homer		
21/05/2013	Credit balanced against P...			100.00				0.00		1	(Unspecified)		

- Client A/C Info screen shows Payout etc.
- Check your Banking report and Activity Reports for adjustments.

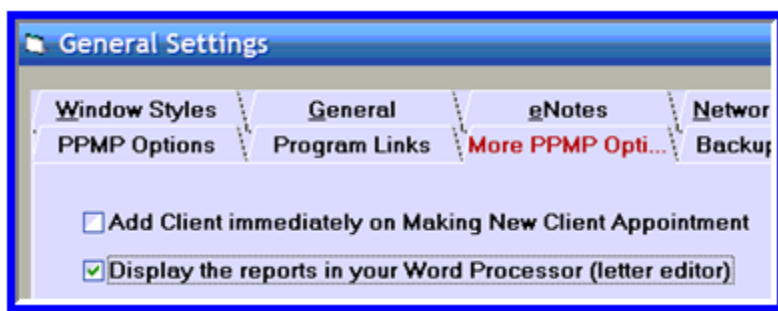
21/05/2013	160	39 Mouse Mickey	\$-100.00
------------	-----	-----------------	-----------

- All reports show negative / refunded amounts

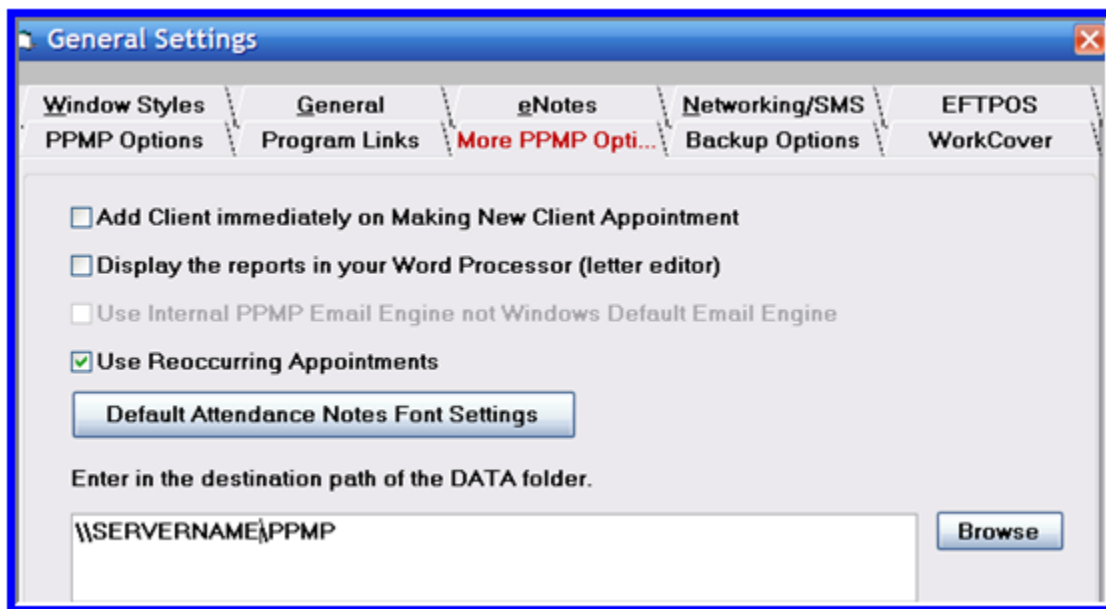
## 17 Data path



- Go to Setup
- Computer Resource Usage



- More PPMP Options

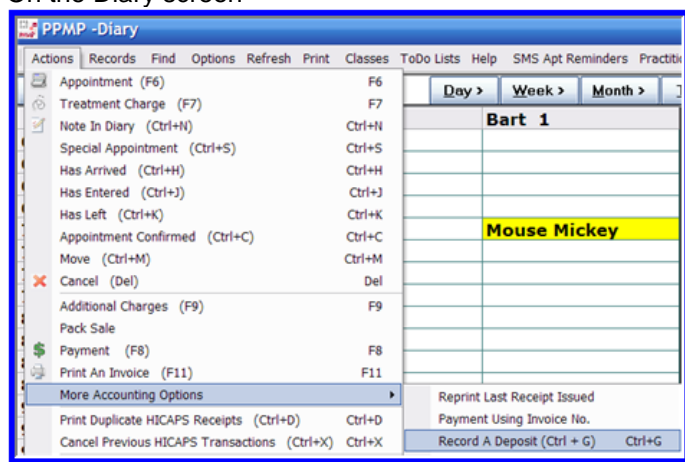


- Make sure the path is [\\servername\PPMP](#) – Close PPMP & Reopen
- Same on all machines EXCEPT Server it stays as C:\Program Files\PPMP

## 18 Deposits

### 18.1 Recording a deposit

On the Diary screen



- Click Actions
- More Accounting Options
- Record a Deposit

**NB:** If you have selected a client on the diary then this is where the deposit will be recorded – otherwise choose a client from the list.

The 'Deposit paid in' dialog box is shown. It contains the following information:
 

- Client No: 32
- Client: Mouse Mickey
- Episode: General
- TOTAL DEPOSIT AVAILABLE: \$0.00
- A table with columns: Drawer, Bank/Card, Branch, Pay Type, Amount. The 'Amount' column shows \$500.00 for 'Cash'.
- Total so far: 500.00
- Buttons: Print receipt, Accept but don't print, Cancel
- Receipt style printed: Physio

- Enter the amount being paid and how it was paid (cash, cheque, etc.)
- Select the Episode

This is a close-up of the bottom section of the 'Deposit paid in' dialog box. It shows the buttons 'Print receipt', 'Accept but don't print', and 'Cancel'. Below these is a label 'Receipt style printed' with a dropdown menu currently set to 'Physio'.

- Select a Receipt Style
- Choose to Print or Accept but don't print

Open up the client's details screen



Deposit held **\$500.00** Details

- Bottom right you will see “Deposit Held”
- Click on Details to view Episodes deposit is related to
- Check the Account Info screen is displaying the correct information

Client Details

Exit Edit A/C Info Episodes

**Main Details** More Details

- Click Episodes

Episodes for Mickey Mouse

Exit Edit A/C Info Attend

**Episode Details** Notes

- Click A/C Info

Account details for Mickey Mouse

Episode: General Unpaid Total : \$0.00

Client No. 32 Deposit Held : \$500.00

Refund Total Deposits

Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance
23/11/2012	Csh\$500.00	136				500.00		(500.00)

- Make sure Balance is in brackets.
- Charge the client in the usual way

## 18.2 Payment using deposit

Select the Client on the diary (or off the list)

PPMP -Diary

Actions Records Find Options Refresh Print Classes

- Appointment (F6) F6
- Treatment Charge (F7) F7
- Note In Diary (Ctrl+N) Ctrl+N
- Special Appointment (Ctrl+S) Ctrl+S
- Has Arrived (Ctrl+H) Ctrl+H
- Has Entered (Ctrl+J) Ctrl+J
- Has Left (Ctrl+K) Ctrl+K
- Move (Ctrl+M) Ctrl+M
- Cancel (Del) Del
- Additional Charges (F9) F9
- Pack Sale
- Payment (F8) F8**

- Click on Actions
- Click on Payment

**Payment**

Client No. 32 Episode General

Name Mouse Mickey

Date	Description	Amount	Unpaid	Paying	Practitioner	H/C	DVA
26/10/2012	Initial Consultation	100.00	100.00	100.00	Bart	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Enter amount being paid

**Paying Some**

**Paying All**

- Click Paying All (or Paying Some)

**Payment**

Client No. 32 Episode General

Name Mouse Mickey

**Payment Details**

DEPOSIT AVAILABLE : \$500.00

Drawer	Bank/Card	Branch	Payment Type	Amount
			Cash	
			Cheque	
			Credit Card	
			Discount	
			Deposit	\$100.00
			Other	
			EFT	
			Medical Fund Direct	
			Direct Deposit	
			Medicare	

- Click in Amount Column and select **DEPOSIT**
- Enter in the Amount

☒ Preview Report?

**Print Receipt (normal)** **Print Fully Itemised** **Accept But Don't Print** **EFTPOS Payment** **Go Back** **Cancel**

- Choose to Print a receipt or Accept but don't print
- OR Tick Preview Report to display the receipt (if you wish to print to an alternate printer)

Print all pages...  
Right click: with printer selection

- Right Click on the 2<sup>nd</sup> Printer Icon

**Print Options**

Edit printer assignment.

Print target

Region	Printer	Copies
<input checked="" type="checkbox"/> Standard Layout	HP Black & White	1

- Print Options Screen will enable you to change the Printer you wish to print to

Printer	Copies
HP Black & White	1

- Click on the ...Button

**Print Setup**

Printer

Name: HP Black & White Properties...

Status: Fax

Type: HP Black & White

Where: HP Universal Printing PCL 6 (v5.3)

Comment: Microsoft XPS Document Writer

Paper: Samsung CLX-3170 Series (Mono)

Orientation: Send To OneNote 2010

Snagit 8

- Select your printer

Account details for Mickey Mouse

Episode: Neck

Client#: 20800

Unpaid Total : \$0.00

Deposit Held : \$400.00

Refund Total Deposits

Net A/C Bal : -\$100.00

GST Bal : \$0.00

Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	DVA Claim
29/11/2013	Cash \$500.00	107115				500.00		(500.00)		2 (Unspecified)			
29/11/2013	PIL - Standard	1		100.00				(400.00)		2 Sam 2413371A	Rooms Treatments		
29/11/2013	Deposit \$100.00	107116				100.00		(400.00)		2 (Unspecified)			

- Go back and display the account info screen (deposit held has decreased as has Account Balance)
- Also note the Refund Total Deposit button (if the account is not in balance this will not be available)

### 18.3 Refund total deposits

In the Client File

Client Details

Exit Edit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs Appointments

Main Details More Details Notes (Empty) More Addresses SMS History

Title: Mr Gender: Male Client#: 20800

Salutation: Mickey

Diary Name: Mouse Mickey

Surname: Mouse

First Name: Mickey

Middle Name:

Complete Address:

Email:

Comments etc:

Phone Work:

Home:

Mobile:

Fax:

D.O.B.:

Date Started: 27/04/2012

Occupation:

Why They Chose Us:

Medical Records Details

Chart Ref:

Medicare No.:

Medicare DVA use ONLY:

Suburb:

Postcode:

Pensioner No.:

Safety Net:

Health Care Card No.:

Veteran Affairs No.:

Medicare Verification:

Deposit held: \$900.00

Details

- Click Episodes tab

- Select Episode
- Click A/C Info

Date	Description	Ref.	GST	Debit	GST Cr.	Credit	Unpaid	Balance	Printed Episode	Fractionner	Location	DVA Claim
29/11/2013	Cash \$0.00	187115				500.00		(500.00)		2 (Unspecified)		
29/11/2013	PRL - Standard	1		100.00				(400.00)		2 Sam 2413371A	Rooms Treatments	
29/11/2013	Deposit 11/11/13	187115				100.00				2 (Unspecified)		

- Click Refund Total Deposits

- Select Credit/Refund Type
- Check Amount Refunding
- Type in a comment
- Click Refund

- Click OK

- Go back to Account info screen and check information recorded correctly

#### 18.4 Transferring deposit to another episode

- Click Refund Total Deposits

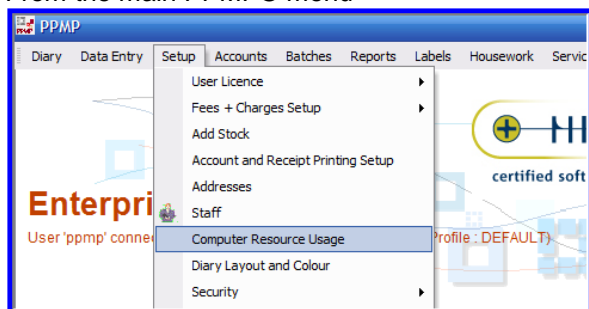
- This must be Refunded as Cash
- In Comments record you are transferring to another Episode or Client
- Click Refund

- Click OK
- You must then follow the Record a Deposit procedure to enter the amount into another Episode or on another client's files
- Your Banking report will then show a negative amount and a positive amount (cancelling each other out)

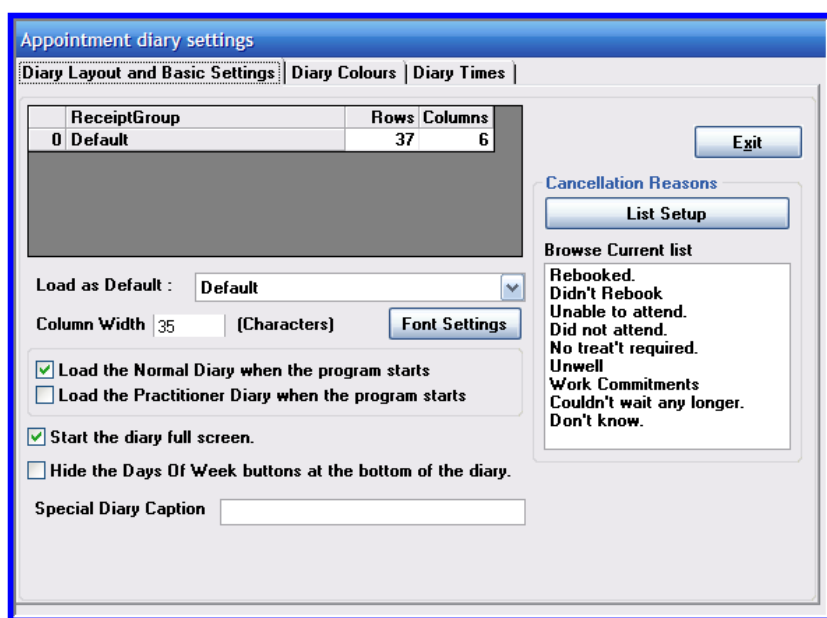
## 19 Diary layout & colour

Click [HERE](#) to watch video

From the main PPMP® menu



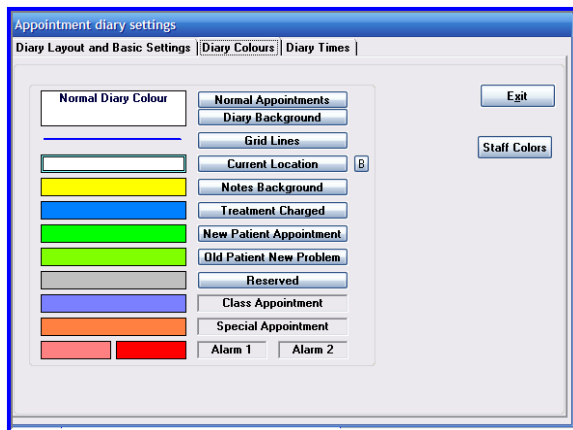
- Setup
- Diary layout and colour



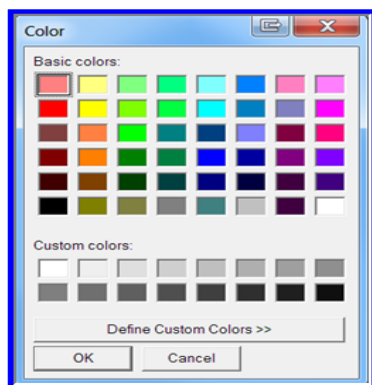
- This is where you set up your diary rows
- Columns
- Fonts



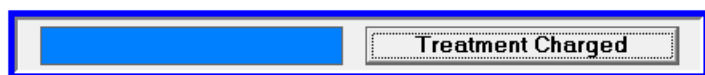
- Click on Diary Colours Tab



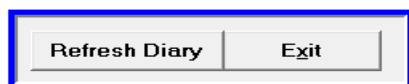
- Colours displayed are the colours currently selected
- To change a colour click on the corresponding button, e.g.: click on Treatment Charge
- A colour chart will appear



- Select a color (e.g.: blue)
- Click OK



- You have selected BLUE for your Treatment Charged

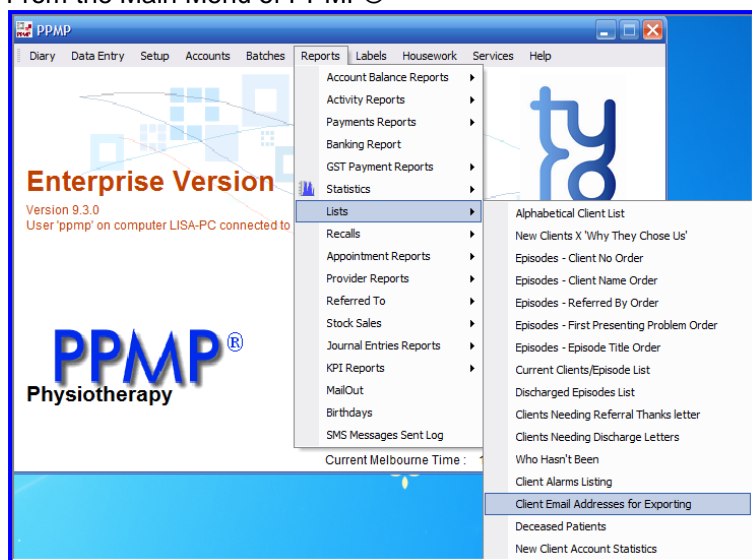


- Click Refresh Diary & Exit
- Your Appointments, Reserves and Notes all appear with your chosen colour.

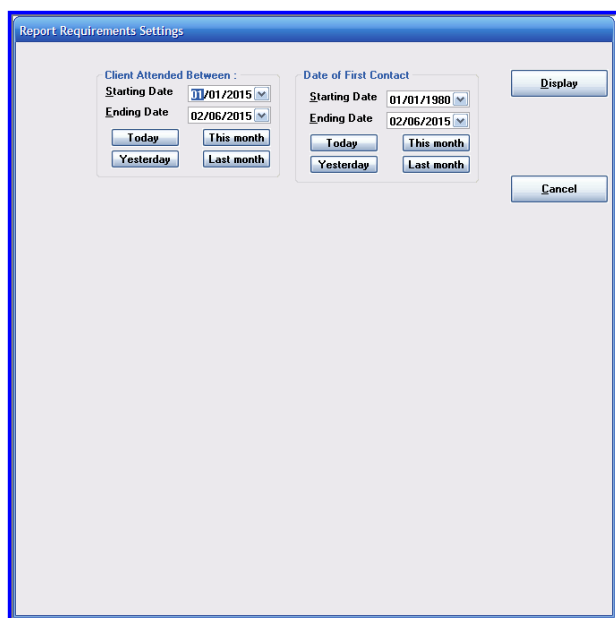
## 20 Emails

### 20.1 Exporting client email addresses

From the Main Menu of PPMP®

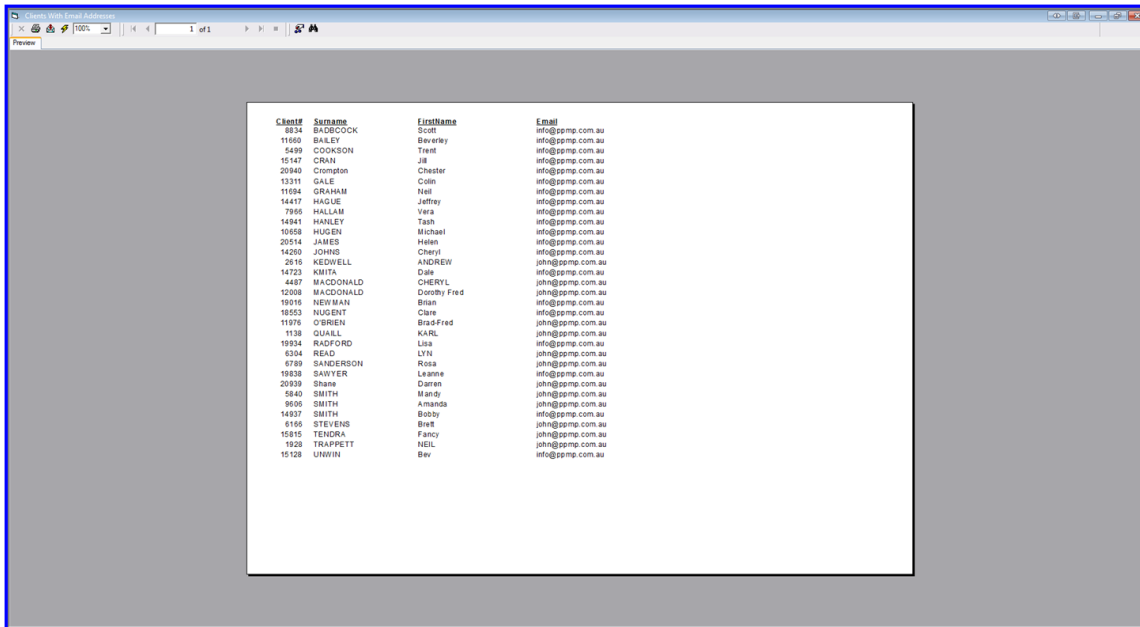


- Select Reports
- Select Lists
- Select Client Email Addresses for Exporting



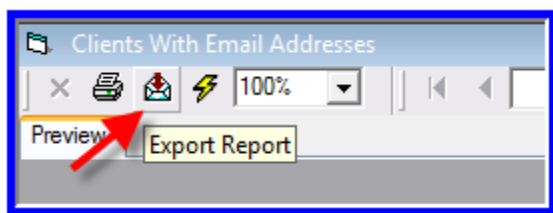
- Select date range (usually Client Attended Between date)
- Click Display



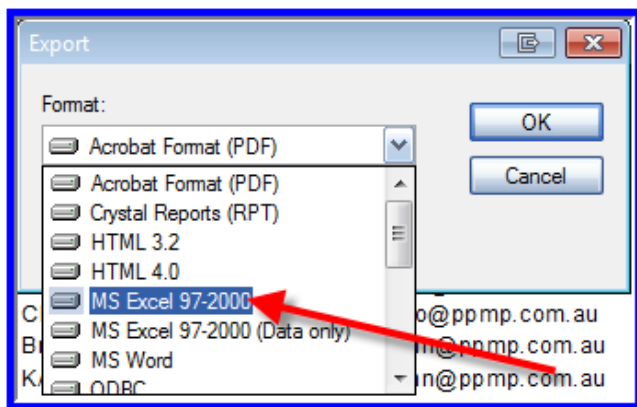


Client#	Surname	FirstName	Email
8934	BARBOCK	Scott	info@ppmp.com.au
11660	BAILEY	Beverley	info@ppmp.com.au
5499	COCKSON	Trent	info@ppmp.com.au
15147	CRAN	Jill	info@ppmp.com.au
20940	Crompton	Chester	info@ppmp.com.au
13311	GALE	Colin	info@ppmp.com.au
11694	GRAHAM	Nell	info@ppmp.com.au
14417	HAGUE	Jeffrey	info@ppmp.com.au
7960	HALLAM	Vera	info@ppmp.com.au
14941	HANLEY	Tash	info@ppmp.com.au
10658	HUGEN	Michael	info@ppmp.com.au
20514	JAMES	Helen	info@ppmp.com.au
14260	JOHNS	Cheryl	info@ppmp.com.au
2616	KEDWELL	Andrew	john@ppmp.com.au
14723	KNITT	Dale	info@ppmp.com.au
4487	MACDONALD	CHERYL	john@ppmp.com.au
12008	MACDONALD	Christy Fred	john@ppmp.com.au
19016	NEWMAN	Brian	info@ppmp.com.au
18553	NUGENT	Clare	info@ppmp.com.au
11976	O'BRIEN	Brad/Fred	john@ppmp.com.au
1138	QUALL	KARL	john@ppmp.com.au
19924	RADFORD	Lisa	info@ppmp.com.au
6304	READ	LYN	john@ppmp.com.au
6789	SANDERSON	Rosa	john@ppmp.com.au
19628	SAVIER	Leanne	info@ppmp.com.au
20939	Shane	Darrin	john@ppmp.com.au
5840	SMITH	Mandy	john@ppmp.com.au
9606	SMITH	Amanda	john@ppmp.com.au
14937	SMITH	Bobby	info@ppmp.com.au
6166	STEVENS	Brett	john@ppmp.com.au
15815	TENDRA	Fancy	john@ppmp.com.au
1928	TRAPPETT	NEIL	john@ppmp.com.au
15128	UNWIN	Bev	info@ppmp.com.au

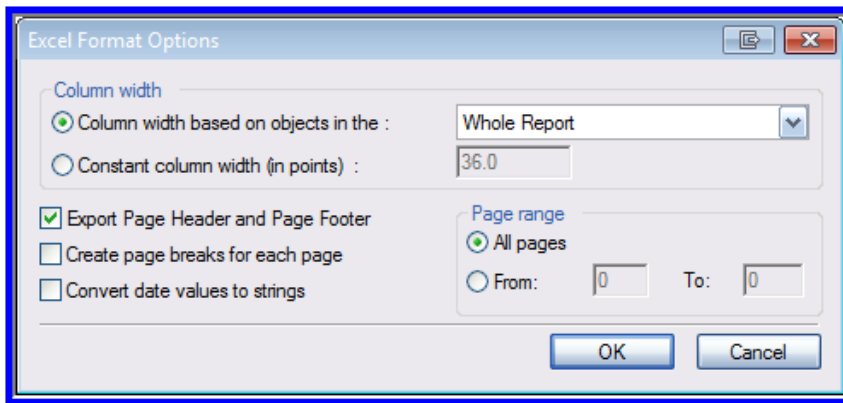
- The following screen appears



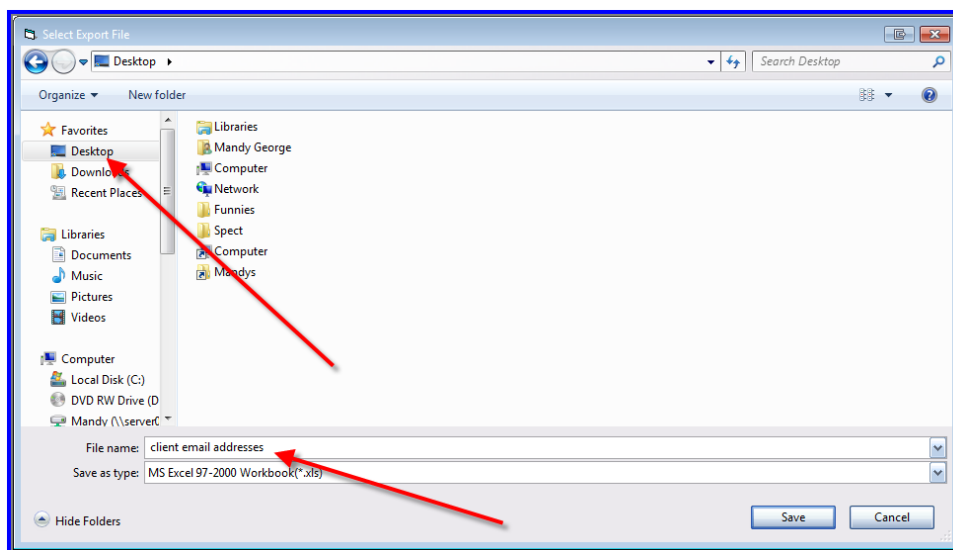
- Click the export icon



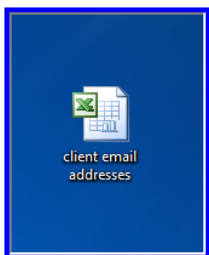
- Select MS Excel 97-2000 from the drop down list
- Click OK



- The following screen appears
- Click OK



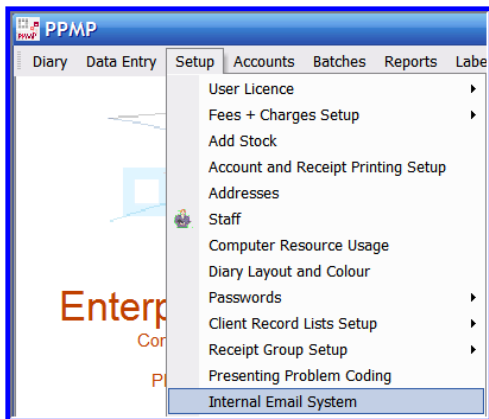
- Select Where you want to save the file
- Name the file to what you want
- Click Save



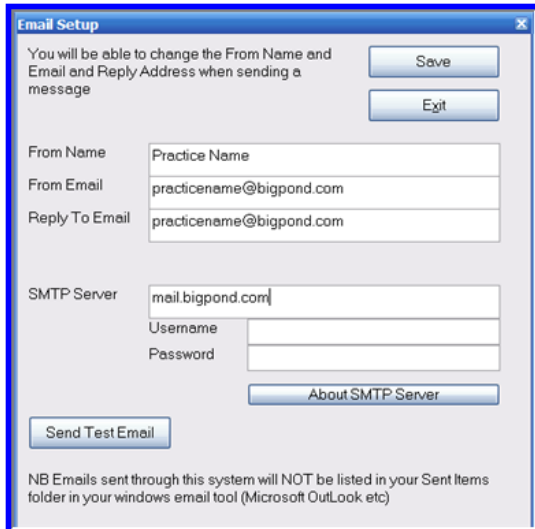
- You should now be able to find your file where you saved it to merge into your email client

## 20.2 Email setup

On the Main Menu PPMP



- Click Setup
- Click Internal Email System



- All fields must be filled in on the above screen

If you are unsure of any of this information, you can download a program to tell you this. The program is called Mail Pass View; it is a free utility that checks your email information.

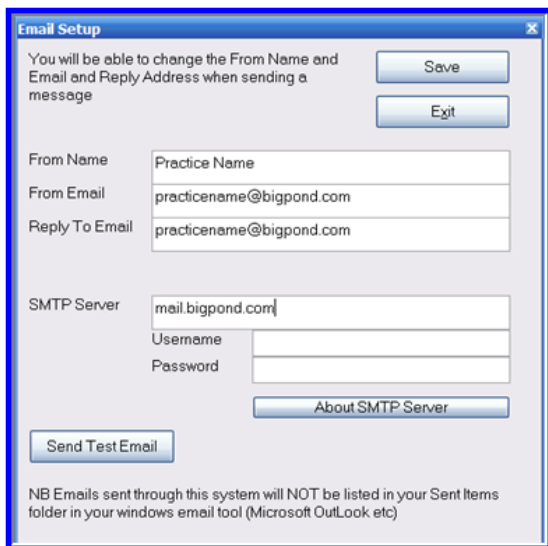
It can be downloaded from here, <http://www.snapfiles.com/get/mailpass.html>



- After you have downloaded & run the program it will come up with a list of your email details.

Name	Applica...	Email	Server	Type	User	Password	Profile
Karen	Outlook...	karen@ppmp.com.au	mail	POP3	karen@...	karen123	
Karen	Outlook...	karen@ppmp.com.au	mail.bigpond.com	SMTP			

- Your email Address, SMTP Server & Password are displayed.



**Email Setup**

You will be able to change the From Name and Email and Reply Address when sending a message

Save Exit

From Name: Practice Name

From Email: practicename@bigpond.com

Reply To Email: practicename@bigpond.com

SMTP Server: mail.bigpond.com

Username:

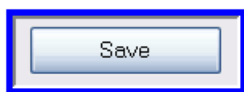
Password:

About SMTP Server

Send Test Email

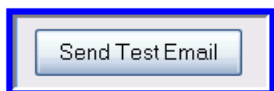
NB Emails sent through this system will NOT be listed in your Sent Items folder in your windows email tool (Microsoft Outlook etc)

- Enter these into the required fields.



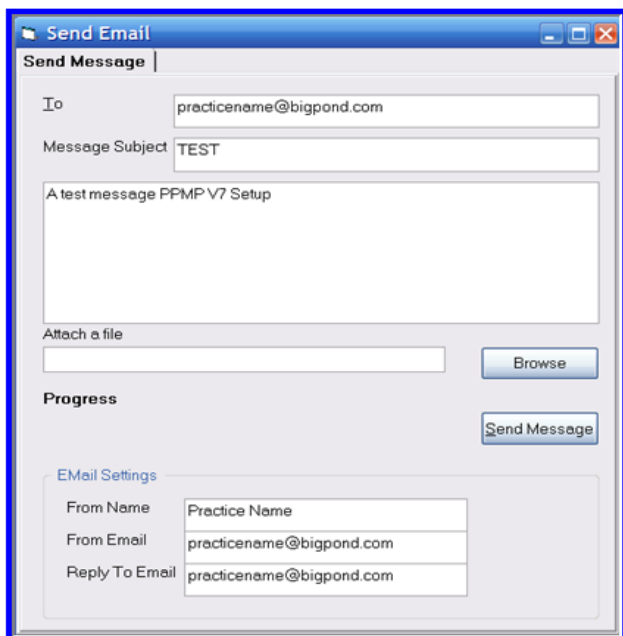
Save

- Click Save



Send Test Email

- Click Send Test Email



**Send Email**

Send Message |

To: practicename@bigpond.com

Message Subject: TEST

A test message PPMP V7 Setup

Attach a file:

Browse

Progress

Send Message

E-Mail Settings

From Name: Practice Name

From Email: practicename@bigpond.com

Reply To Email: practicename@bigpond.com

- Put a Message Subject Title (TEST)
- A brief description will automatically be inserted into the message box



- Click Send Message

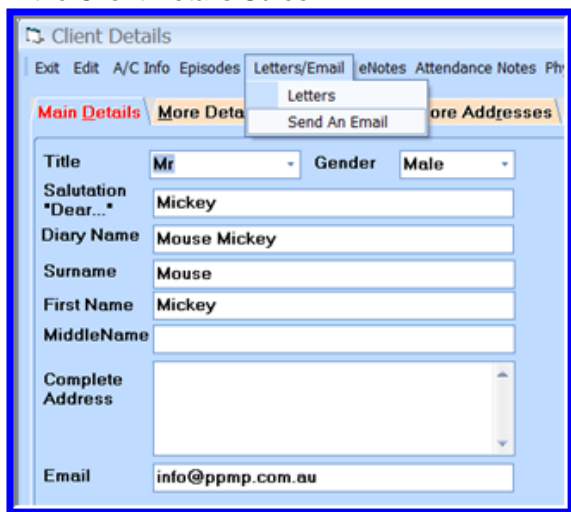


- Check your email – the test email should be in your inbox.

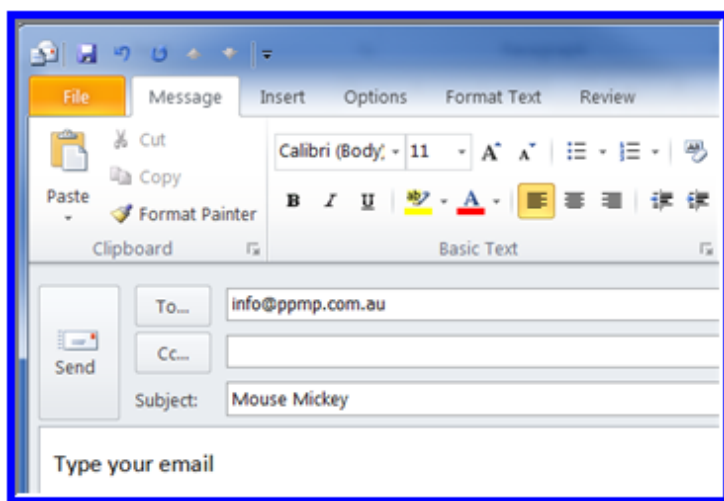
### 20.3 Sending emails (You can send individual emails or bulk emails)

#### Send Individual Emails

In the Client Details Screen



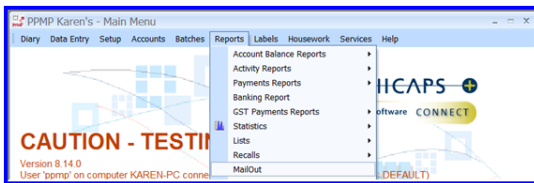
- Click on Letters/Email
- Click Send Email



- Type your message and then
- Click send

## 20.4 Bulk email

On the main screen PPMP



- Click Reports
- Mailout

Report requirements settings

Episode Details Criteria      Billing History Criteria

Client Details Selection Criteria      User Client Classification

Why They Chose Us Includes

[ Client Started Date Between ]

Starting Date: 01/01/1980

Ending Date: 20/12/2013

Today      This month

Yesterday      Last month

Extra SQL Query Condition

Ignore Gender

Post Code      DOB

From: 0      From:

To: 0      To:

After building the list you can print labels immediately or create a merge file

Exit

Build The List

Stopping

- Select the Start Date Range

OR

Report requirements settings

Client Details Selection Criteria      User Client Classification

Episode Details Criteria      Billing History Criteria

Payment Methods

New0111  
UNINSURED  
Workcover Self-Insured  
Private Hlth Insur  
Dietician  
Workcover

Treatment Locations

Rooms Treatments  
Hydro Visits  
Gym Visits  
Worksite Visits  
Home Visits  
Reports

Episode Title

Episode1  
Episode2  
Episode3  
Episode4

Include      Exclude

[ Episode Start Date Between ]

Starting date: 01/01/1980

Ending date: 20/12/2013

Today      This month

Yesterday      Last month

Usual Therapist

(Unspecified)  
Minnie  
Gil Zimmerm (Not Em  
FIONA BUD (Not Em  
Sam 2413371A  
Meeeee

All Staff  
Currently  
Employed  
Only

Only this Referral Source

Only this condition

Choose From Standard List

Exit

Build The List

Stopping

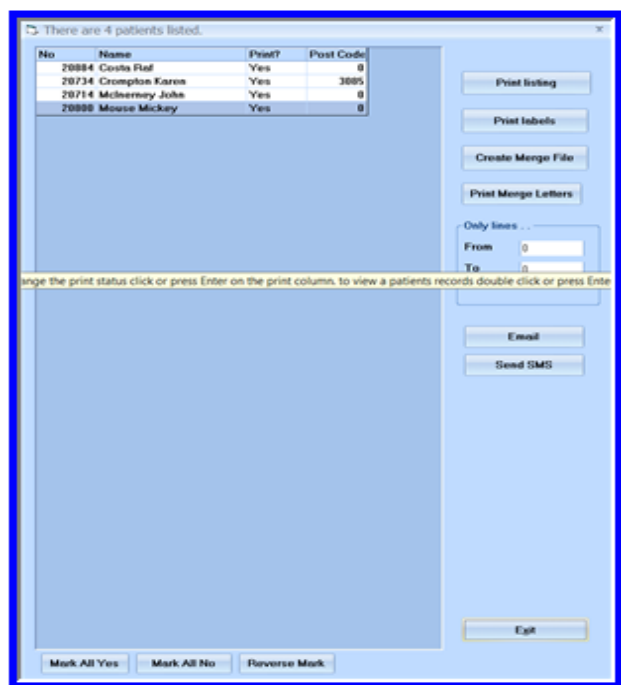
- Click Episode Selection Settings
- Select the Episode Start Dates
- Select the Payment Method, Location, Staff (or select nothing to get all fields)

OR

- Select Amount Billed (by specifying an amount your report will display all clients that have been billed that amount between the specified dates)

- Click Build the List

- The list is being prepared



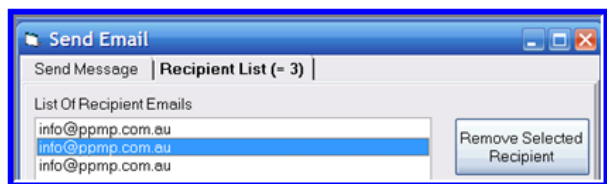
- Your list of clients will be displayed
- NB:** Top of the screen tells you how many patients are on the list



- Click Email



- This tells you how many clients have an email address
- Click OK



- Click Recipients to see a list of all clients with email address (delete option available)
- Click back on Send Message



- Fill in the Message Subject and a short description
- Attach file (if required)
- Click Send message

- Click Start

- Once all messages have been sent
- Click Exit

## 21 Flag 1 & 2 setup

Go to Client Details

PPMP -Diary

Actions Records Find Options Refresh

< Month < Week < Day 05/06/

**Bart 2**

6:00

6:15 **Mouse Mickey**

- Double click on clients name on the diary (or search for client)

Client Details

Exit A/C Info Episodes Letters/Email eNotes Atten

Main Details More Details Notes (Empty) More

- More details

News Letter (Flag 1) ☒

Flag 2 ☐

Cancelled Appointments 0

- Tick News Letter (Flag 1)

Client Details

Exit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs App

Main Details More Details Notes (Empty) More Addresses SMS History

[ Family Group ] Set/Change Family View Family Details Remove from Family

[ User Classifications ] Hobbies/Sports/Interests User List 2

Test

PPMP

? This record has changed. Save the changes? (Cancel = don't exit)

Yes No Cancel

- Click Exit & Yes to Save the Changes

On the Main Screen of PPMP

PPMP

Diary Data Entry Setup Accounts Batches Reports Labels Housework Services Help (F1)

Design labels

Print labels

- Print Labels

QUERY PATIENT FILE

[Flag1] = True

[Flag1] = True  
 [Client No] > 0 and [Client No] < 67  
 [DOB] > #mm-dd-yy# and [DOB] < #mm-dd-yy#  
 [Flag1] = True and ([Client No] > 0 and [Client No] < 6  
 [Post Code] Between 4000 and 4010  
 [Post Code] = 4011

<- List - use query

- Select (Flag 1) = True

<- List - use query

- Click "List - use query"

There are 2 patients listed.

No	Name	Print?
18	Mouse Mickey	Yes
12	White Snow	Yes

Exit

Print labels

Print Merge Letters

Send EMail

Send SMS Message

Build CSV

- List displays

Exit

Print labels

Print Merge Letters

Send EMail

Send SMS Message

Build CSV

- You can then print labels, email or sms

QUERY PATIENT FILE

[Flag2] = 1

[Flag1] = True

<- List - use query

- If using Flag 2 – change (Flag1) to (Flag2) = 1 (for true – meaning you want a list of clients who have flag 2 ticked).

There are 1 patients listed.

No	Name	Print?
18	Mouse Mickey	Yes

Exit

Print labels

Print Merge Letters

Send EMail

Send SMS Message

Build CSV

- Clients listed have Flag 2 ticked – a client can have both Flag 1 & 2 ticked

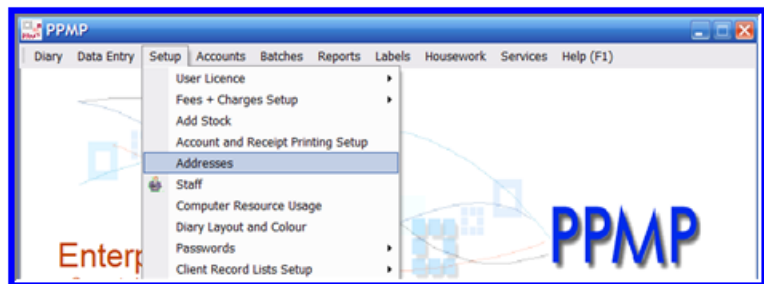
**NB:** If you are after a list of clients that **do not** have Flag 2 ticked – change (Flag1) to (Flag2)= 0

**OR:** If you are after a list of clients that **do not** have Flag 1- ticked – change (Flag1)= 0

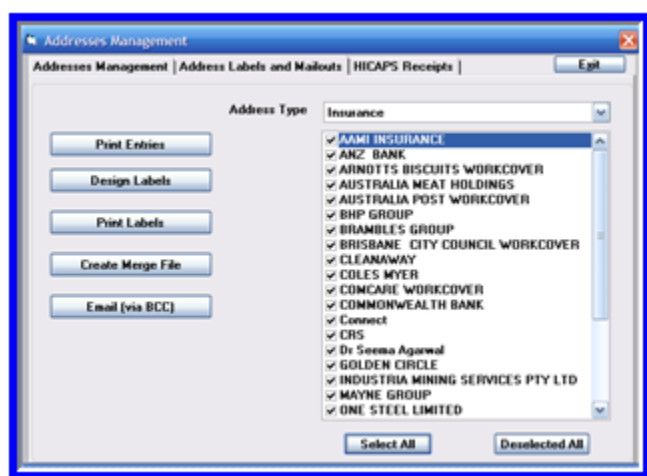
## 22 List and labels

You can print lists/labels for doctors or whoever you have in your addresses lists:

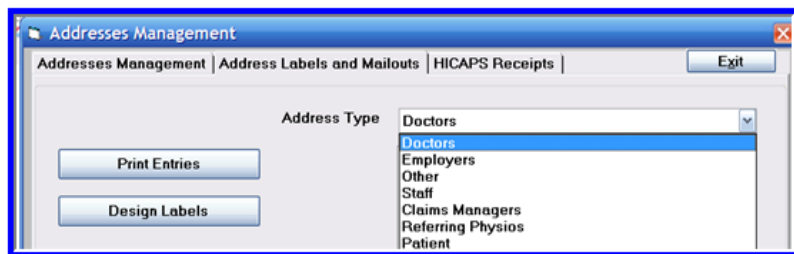
On the PPMP main menu



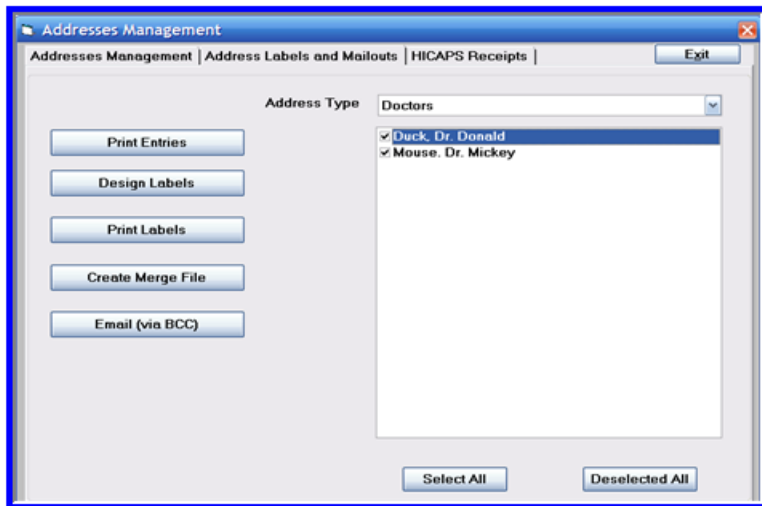
- Go to Setup
- Addresses



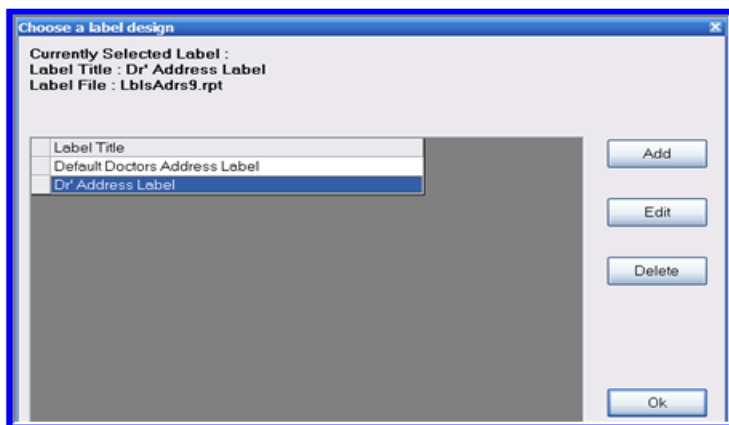
- Click on the Address Labels & Mailouts tab.
- Click Design Labels



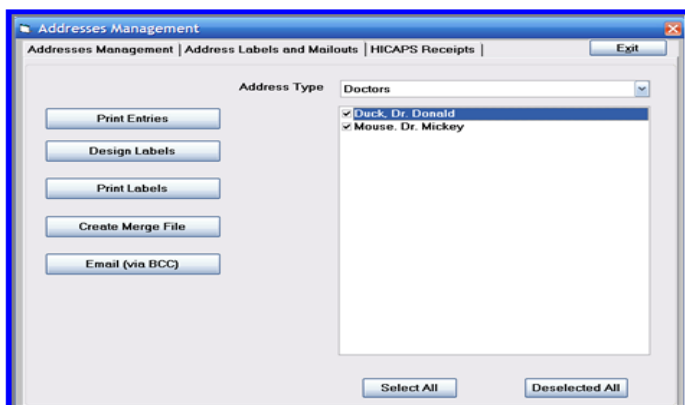
- Make a selection in the Address Types List



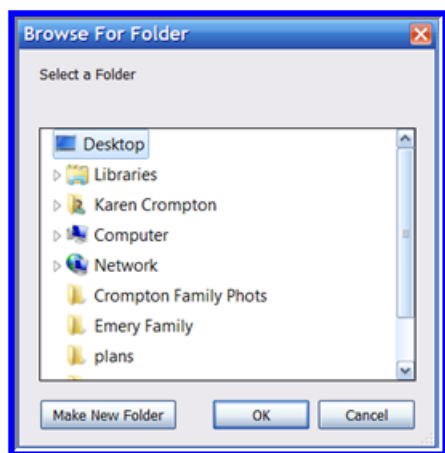
- Make your selections on the list (Deselect All and select the individuals you want or Select All)
- Print labels



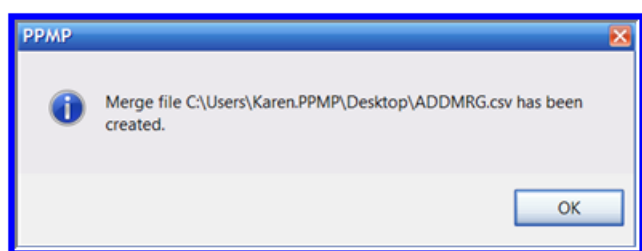
- Select Label
- Click OK
- Create a List of All Dr's Names & Addresses



- Select your List from Address Types
- Click Create Merge File



- Select where you would like to save your list



- Click OK



- Go to where you saved your list

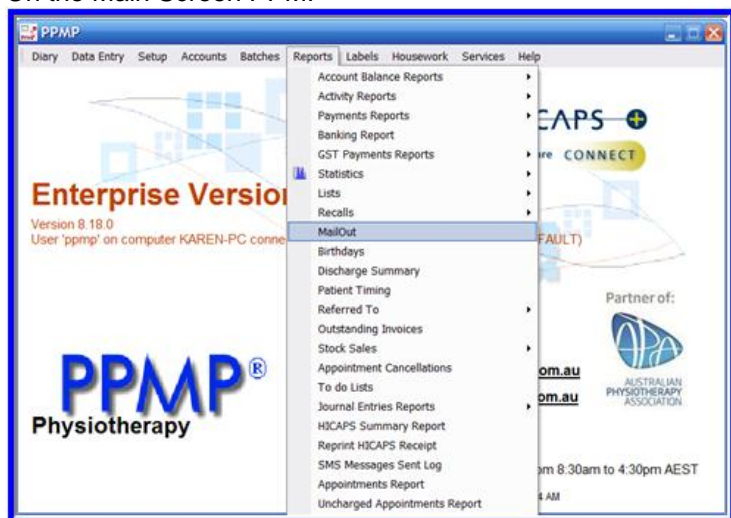
A	B	C	D	E	F	G	H	I	J
SendTo	Address	Phone1	Phone2	Salutation	Provider No	Fax	Mobile	Email	MenuTitle
Dr. Donald Duck	123 Disney Road	9123 4567	9123 4567	Dr. Duck	0123456K	9123 4566	0400 123 456	dduck@duckenterprise.com	Duck, Dr. Donald
Dr. Mickey Mouse	126 Disney Road	9123 6788	9123 6789	Dr. Mouse			0401 123 456	mickey@disneyland.com	Mouse, Dr. Mickey

- View information saved

If you need any help with Mail Merge in Word try this link - <http://support.microsoft.com/kb/294694>

## 23 Mailout

On the Main Screen PPMP



- Go to Reports
- Mailout

This brings up the reports requirement page

The screenshot shows the 'Report requirements settings' dialog box. It has two tabs: 'Episode Details Criteria' and 'Billing History Criteria'. The 'Billing History Criteria' tab is active, showing 'User Client Classification' and 'Client Started Date Between'. The 'Starting Date' is set to 01/01/1980 and the 'Ending Date' is set to 14/07/2014. There are buttons for 'Today', 'This month', 'Yesterday', and 'Last month'. There is also an 'Ignore Gender' checkbox. On the right side, there are buttons for 'Exit', 'Build The List', and 'Cancel'. At the bottom, there is a note: 'After building the list you can print labels immediately or create a merge file'.

This is a close-up of the 'Client Started Date Between' section from the previous screenshot. It shows the 'Starting Date' field with the value 01/01/1980 and the 'Ending Date' field with the value 14/07/2014. Below these fields are four buttons: 'Today', 'This month', 'Yesterday', and 'Last month'.

- Enter the date range – This relates to when the Client first attended your practice – **LEAVE AS IS IF YOU WANT ALL ON YOUR DATABASE**
- Then click Build the List

No	Name	Print?	Post Code
20957	Mouse Mickey	Yes	0

Choose what you would like to do: -

- Print Labels
- Create Merge File (will give you an excel spreadsheet with Names, Addresses, Phone numbers, DOB etc.)
- Print Merge Letters (Letters created in PPMP)
- Email
- SMS

### 23.1 Mailout new episodes

- Click Episode Details Criteria to narrow down your search

- Change the Episode start dates to list all clients who have episodes that started between your requested dates (if a client has more than 1 episode started between these dates they will appear on the list twice)

- If you want to narrow your search for a particular Payment Method or Practitioner - Select a Payment Method or charge type or Therapist
- Click Build This List



## 23.2 Mailout - List of clients that have spent above a certain dollar amount

Report requirements settings

Episode Details Criteria | Billing History Criteria

Client Details Selection Criteria | User Client Classification

- Click on Billing History Criteria

In The Date Range

From 01/05/2014 To 14/07/2014

- Select your Date range

Report requirements settings

Client Details Selection Criteria | Billing History Criteria

Episode Details Criteria | User Client Classification

In The Date Range: From 01/01/2009 To 13/12/2009

Amount Billed: This Amount \$0.00

Add Up: All Charges (selected), Just Selected Item Codes

Has been billed for Item Codes: 560 - Strength and Stretch, LEGAL - Legal report

From These Charge Types: Treatment, Miscellaneous, Shock, Test

Buttons: Exit, Build The List

- By inserting a “dollar amount” in the Amount Billed section – this will give you a list of all clients that have been billed (e.g. \$50.00) or more between the requested dates

Add Up

☒ All Charges

☐ Just Selected Item Codes

(NB An amount of 0.00 means this test is not performed)

- Select ALL charges or Just Selected Item Codes - click on an Item Code and Charge Type from the List
- Click Build the List

The above 3 steps can also be combined e.g.: you can select your client Start Dates from No:1 then select a Payment Method from No:2 and an amount from No:3 – Then Build the List

## 23.3 Mailout - User client classification

If you have setup Lists in Client File (More Details) you can also select from these list

Report requirements settings

Episode Details Criteria | Billing History Criteria

Client Details Selection Criteria | User Client Classification

[ User Classifications ]

Hobbies/Sports/Interests: 33333, 22222, 44444, 55555, 66666, 11111, July 2013

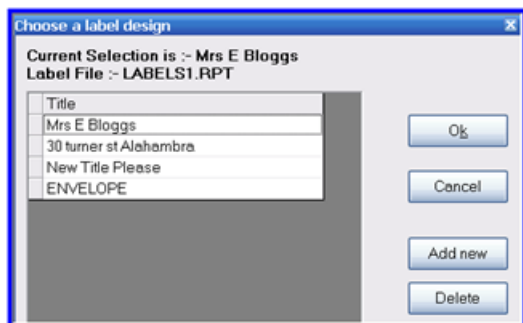
User List 2: aaaaaa, bbbbbb, ccccc, ddddd, eeeee, ffff

User Classification 1: Joy Test, Standby Message, asdadada

User Classification 2: dddddddd, eeeeeeee

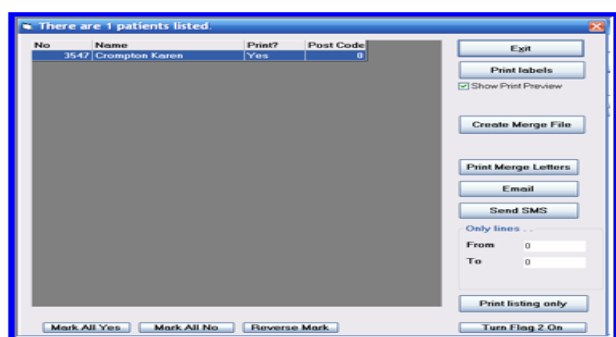
Buttons: Exit, Build The List, Cancel

- Select from the List you have created
- Build the List
- This report only refers to what you have selected on your List (you can't combine 2 lists)



- Click on Print Labels or Merge Letters
- Select the Label or Letter design you wish to print
- Click OK

**NB:** Before doing the mailout you can edit your list:-



- Click on Yes in the Print column to change to No (or click No to change back to Yes)
- Patient's with No selected will not be included in Labels, Letters or emails.
- They will still appear on the List if you select Print Listing only (with NO in the Print Column).

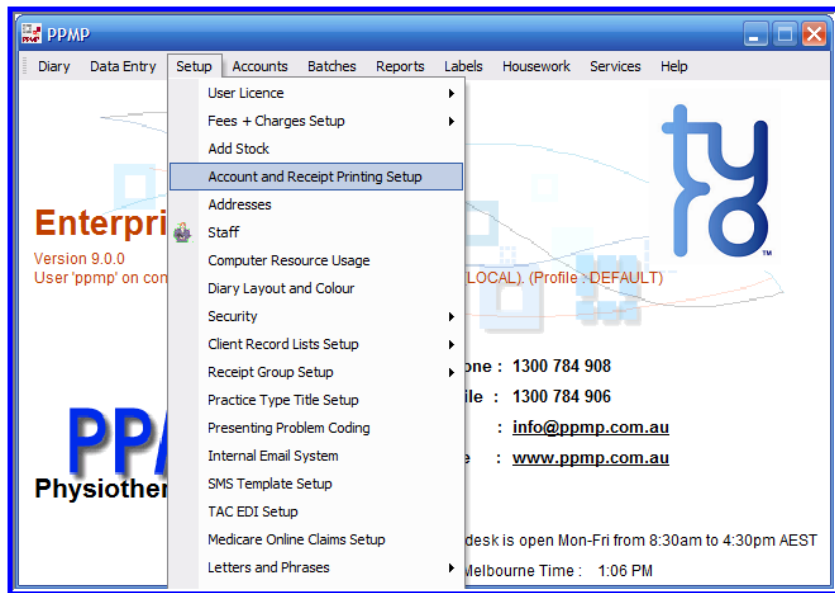


- You can now select to either Print Listing, Print Labels, Print Merge Letters, Email or SMS

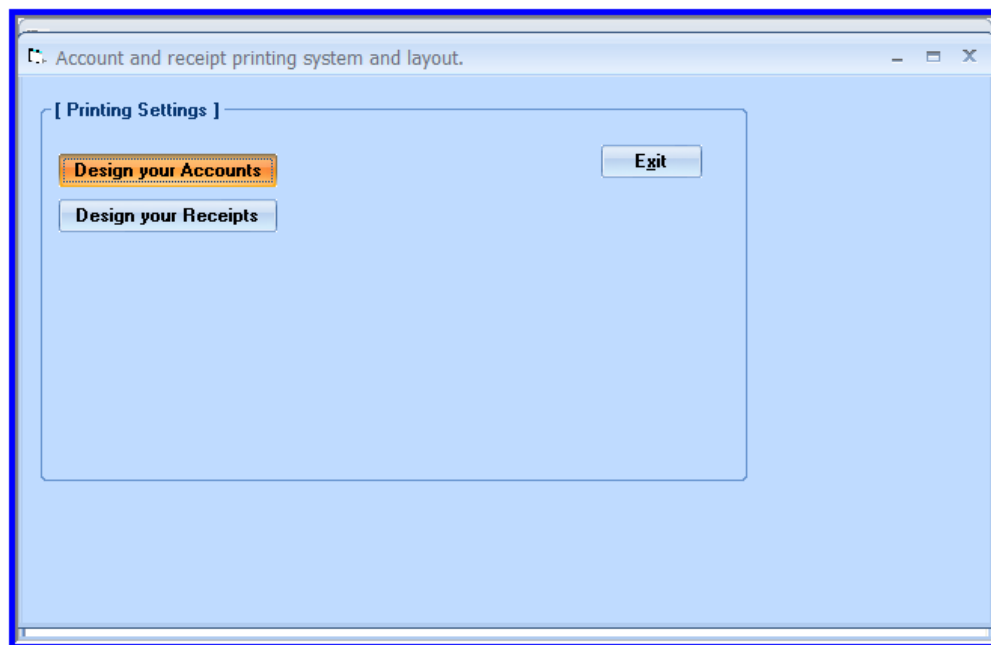
## 24 Printer setup for accounts & receipts

Click [HERE](#) to watch video

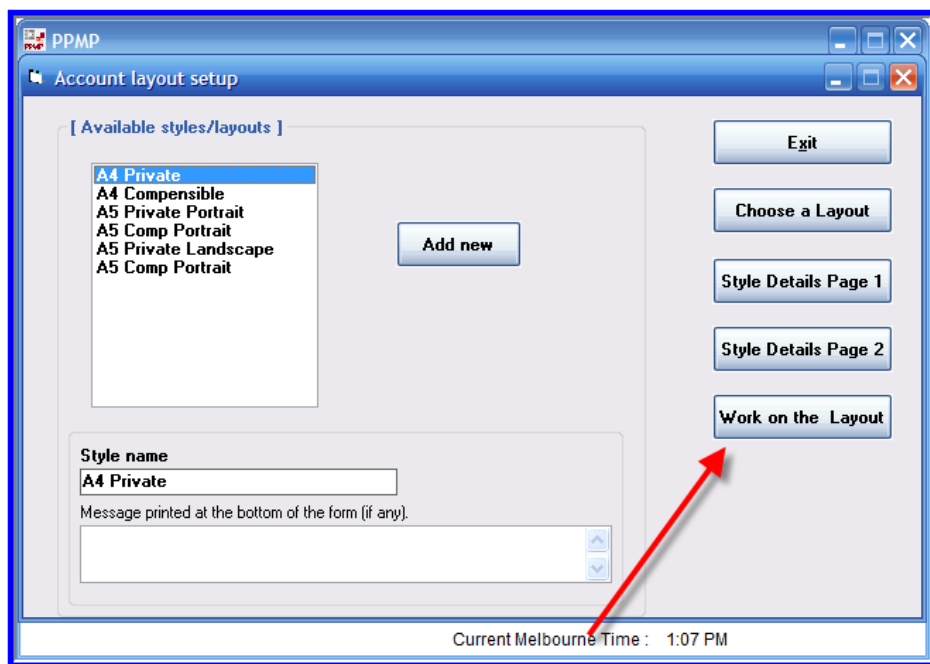
On the Main PPMP® Menu



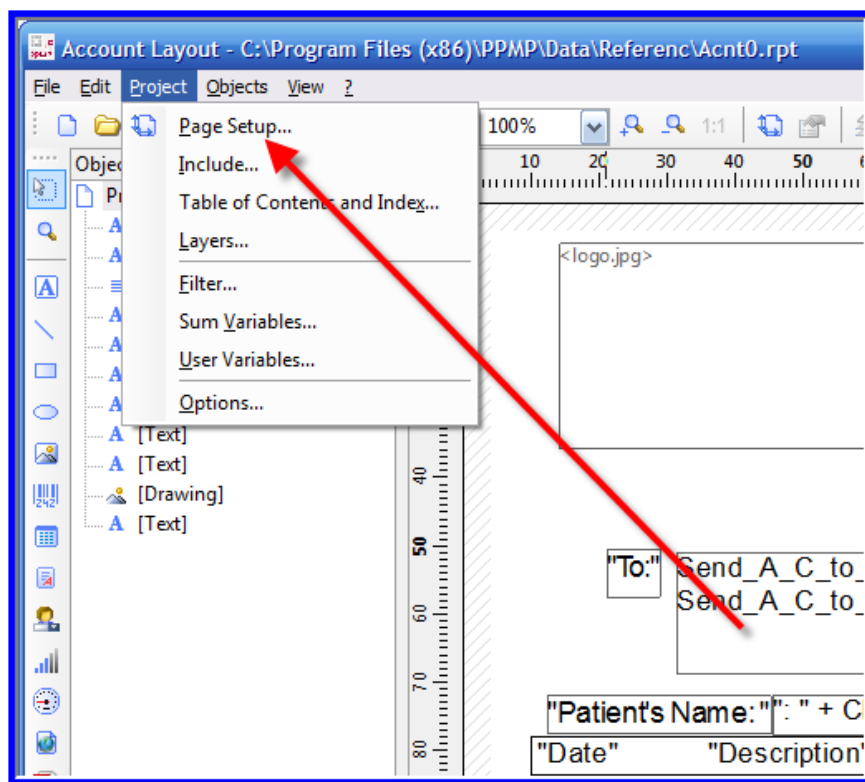
- select Setup
- Account & Receipt Printer Setup



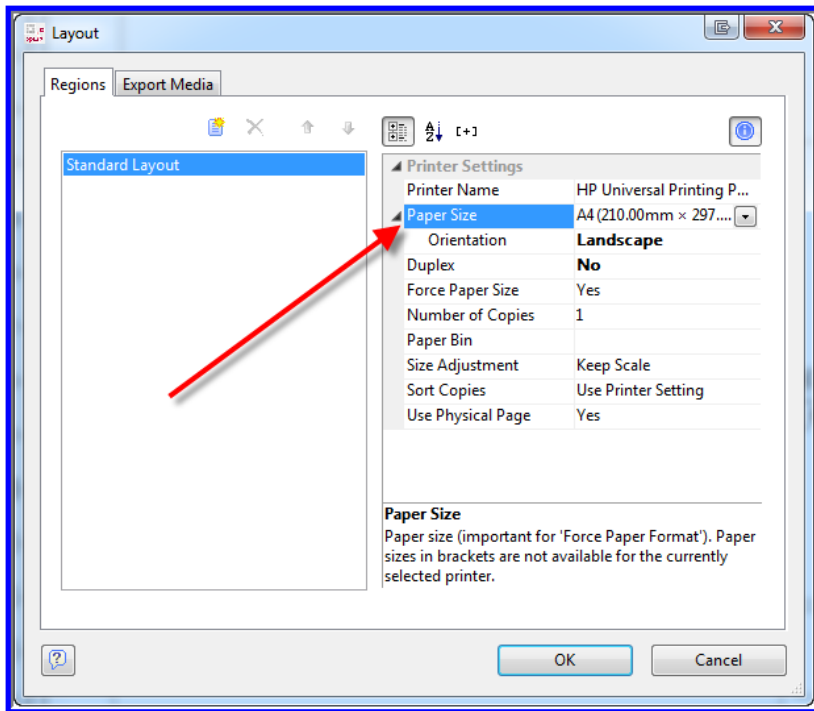
- Select Design your Accounts
- Select the account layout that you use (you may use a few, you will need to repeat steps)



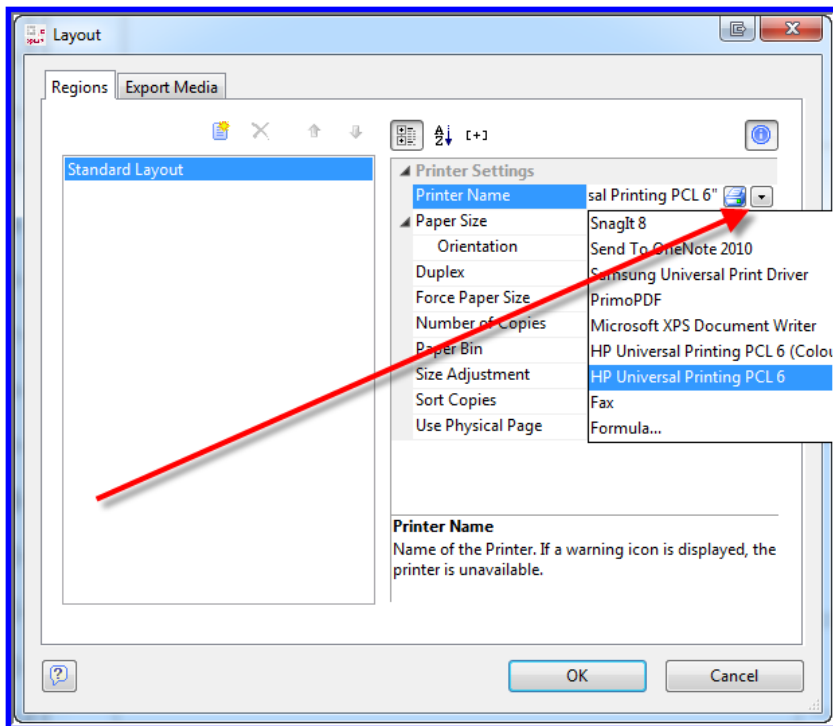
- Click Work on the Layout.



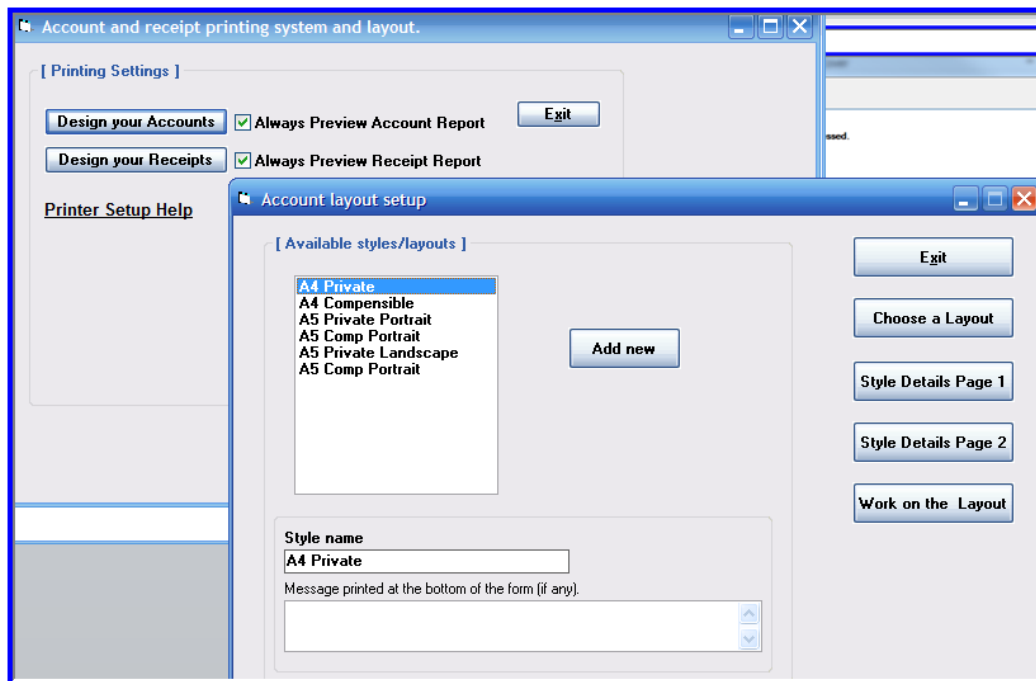
- The design will open, select Project then Page Setup



- Select Paper size
- Select Orientation and other setting for your printer can all be selected in here.



- Click the drop down box to bring up a list of printers on your computer and select the one you wish to use.
- When you are happy with your entire selections click "OK" to save your settings.

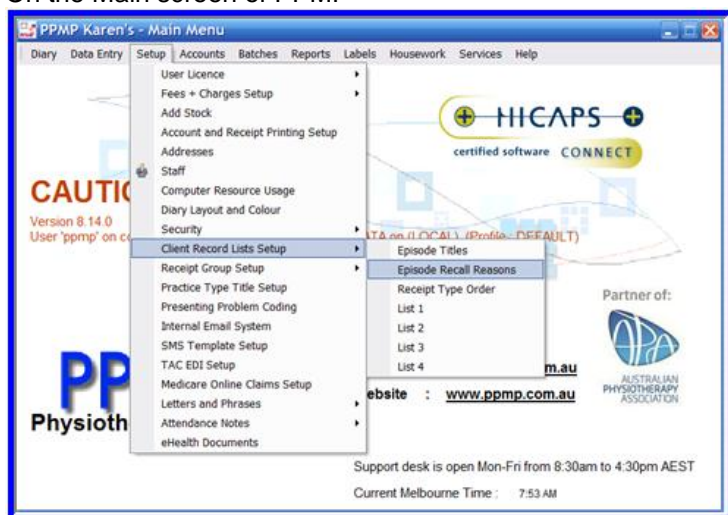


- Repeat steps for all Account & Receipt layouts that you use.

## 25 Recalls

### 25.1 Create your own recall reasons

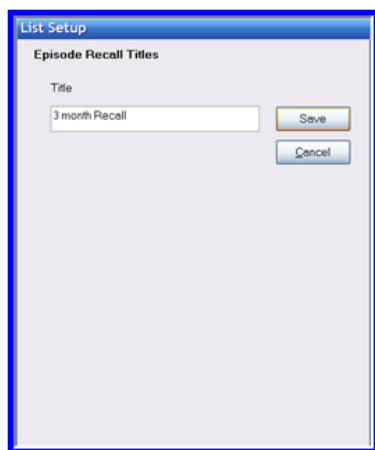
On the Main screen of PPMP



- Click on Setup
- Client Record Lists Setup
- Episode Recall Reasons



- Click Add

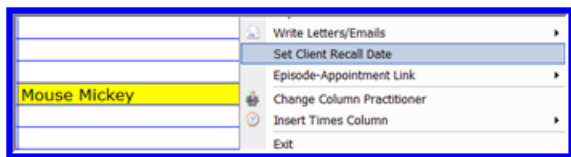


- Enter a Recall Title Name
- Click Save

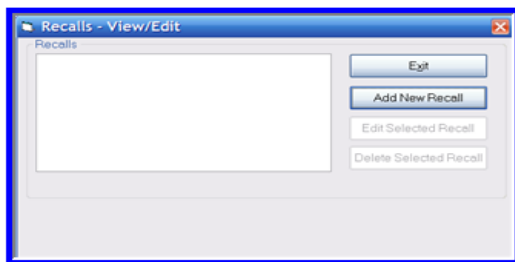


- Click Exit

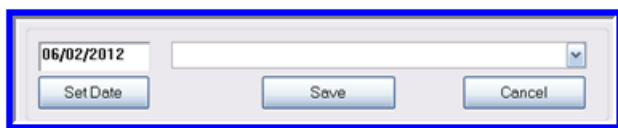
## 25.2 Setting recalls



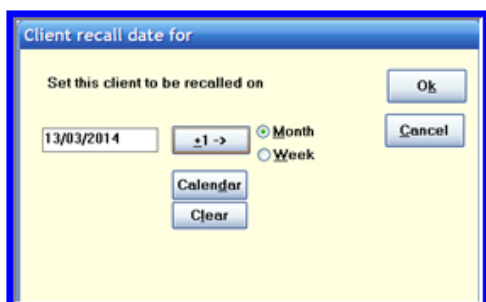
- Right Click on client's name (from the diary)
- Click Set Client Recall Date



- Click Add New Recall

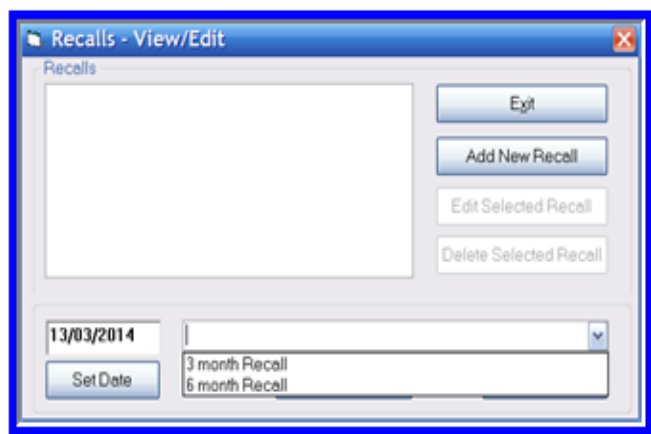


- Click Set date

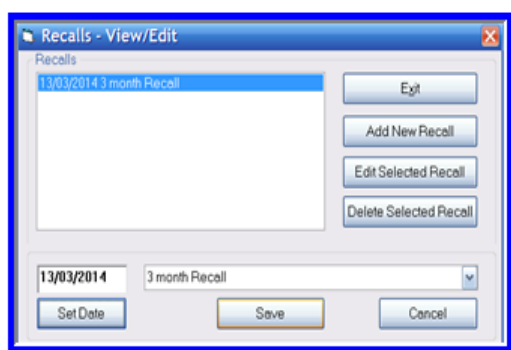


- Set the date (either click ahead Month or Weeks or click Calendar to select date)
- Click OK



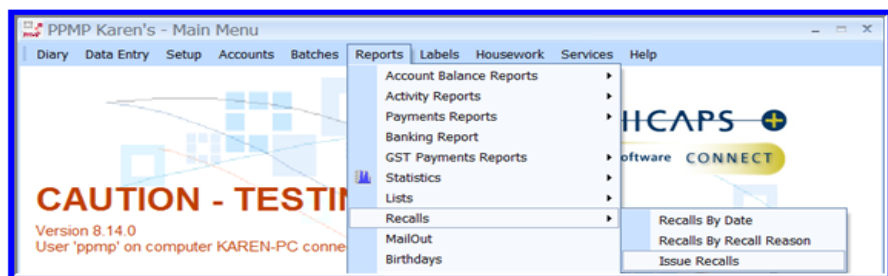


- Select Recall reason from drop down list or type in a different reason



- Click Save
- Click Exit

### 25.3 To view/action recalls



- Click Reports
- Recalls
- Issue recalls

Report Requirements Settings

**Payment Methods**

- New0111
- UNINSURED
- Workcover Self-Insured
- Private Hlth Insur
- Dietician
- Workcover
- D.V.A.
- D.V.A. Paperless
- INJURYNET
- INJURYNET— 2 Invoice
- Australia Post

**Date Range Covered**

Starting Date: 01/12/2013

Ending Date: 30/06/2014

Today This month

Yesterday Last month

- Select Date Range

☒ Only recalls no done date

☐ All recalls

- Select Only Recalls – no done date

**Recall Reason**

3 month Recall

6 month Recall

- Select Recall Reason (or leave blank for ALL recall reasons)
- Display

Recalls

Recall Reason	Client No	Surname	Firstname	Recall Date	Episode Title	Episode No	Email	Mobile	Include	Done
3 MONTH RECALL	20800	Mouse	Mickey	13/03/2014	Back	1			<input checked="" type="checkbox"/>	<input type="checkbox"/>
6 MONTH RECALL	20800	Mouse	Mickey	20/12/2013	Back	1			<input type="checkbox"/>	<input type="checkbox"/>

Select All

UnSelect All

Reverse Selection

Collapse All

Expand All

Just Mark Selected As Done

Exit

Merge Letters

Send SMS

Send Email

Print Labels

Export CSV

Email Message:

- Tick the Recalls to include

The screenshot shows a software interface with a light blue background. On the left, there are five buttons arranged in two rows: 'Merge Letters', 'Send SMS', 'Send Email' in the top row, and 'Print Labels', 'Export CSV' in the bottom row. To the right of these buttons is a large text area labeled 'Email Message:' with the placeholder text 'If emailing type message in this field'.

- Select from Options - Merge Letters /Send SMS/ Send Email / Print Labels / Export CSV.

OR

The screenshot shows a single button with the text 'Just Mark Selected As Done'.

- Click Just Mark Selected as Done
- Exit

#### 25.4 Selecting recalls by date

Client Recall Listing					
Recall Date : 16/12/2013					
Client#	Client Name	Recall Reason	Recall Issued	Episode	Method
20800	Mouse Mickey	6 month Recall	20/12/2013	Back	SMS
Recall Date : 20/12/2013					
Client#	Client Name	Recall Reason	Recall Issued	Episode	Method
20800	Mouse Mickey	6 month Recall		Back	

- All recalls will be listed– Including recalls sent Indicating how they were notified.

#### 25.5 Selecting recalls by reason

Client Recall Listing					
Reason : 6 month Recall					
Recall Date	Client#	Client Name	Episode	Recall Issued	Recall Method
16/12/2013	20800	Mouse Mickey	Back	20/12/2013	SMS
20/12/2013	20800	Mouse Mickey	Back		

- All recalls will be listed– Including recalls sent Indicating how they were notified.

## 26 Refunds / Credits

**Client Details**

Exit Edit A/C Info Episodes Letters/Email eNotes Attendance Notes Printouts Basic Details Packs Appointments

**Main Details** More Details Notes (Empty) More Addresses SMS History

Title  Gender  Client#

Salutation "Dear..."  Phone Work

Diary Name  Home

Surname  Mobile

First Name  Fax

Middle Name  D.O.B.

- Open Client Details Screen
- Click A/C Info

**Account details for Mickey Mouse**

Episode  Unpaid Total : \$0.00 Net A/C Bal : \$0.00

Client No.  Deposit Held : \$0.00

GST Bal : \$0.00

Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	TAC Status
01/03/2013	500 - Initial Consultation	1		100.00				100.00		1	Homer	Rooms	
21/05/2013	Cash:\$100.00	159			100.00		0.00			1	(Unspecified)		

To work on an entry click on it first.

- Click on the Treatment Charge

☐ Hide Adjustments

☐ Show class packs only

View/Reprint

Quotes on File A/C History Print Credit

View Entry in Detail Print Payment Summary

Attendance History Print A/C Exit

**Activity Summary**

	Charges	Payments	No of Rx's
All	100.00	-100.00	1
YTD	100.00	-100.00	1
MTD	.00	-100.00	

- Click Credit Button

**Credit Adjustment**

Credit/Refund Type:

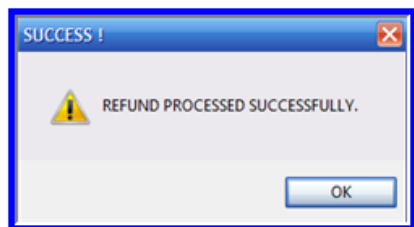
Credit Amount:

Max Credit Amount:

Comments:

Refund Cancel

- Select Credit/Refund Type
- Enter amount being refunded
- Enter comment relating to refund (e.g. why it is being refunded)
- Click Refund



- Refund Processed Successfully
- Click OK
- Exit

Account details for Mickey Mouse													
Episode	All Episodes			Unpaid Total : \$0.00				Net A/C Bal : \$0.00					
Client No.	39			Deposit Held : \$0.00				GST Bal : \$0.00					
Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	TAC Status
01/03/2013	500 - Initial Consultation	1		100.00				100.00		1	Homer	Rooms	
21/05/2013	Cash: \$100.00	159				100.00		0.00		1	(Unspecified)		
21/05/2013	PAYOUT : \$100.00, Refu...	CRD				100.00		(100.00)		1	Homer		
21/05/2013	Credit balanced against P...			100.00				0.00		1	(Unspecified)		

- Client A/C Info screen shows Payout etc.
- Check your Banking report and Activity Reports for adjustments.

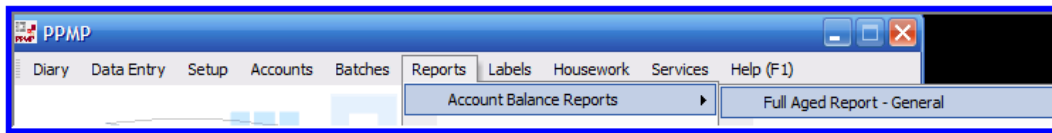
21/05/2013	160	39 Mouse Mickey	\$-100.00
------------	-----	-----------------	-----------

- All reports show negative / refunded amounts

## 27 Reports

### 27.1 Accounts balance

On the Main screen of PPMP®



- Reports
- Account Balance Reports
- Full Aged Report General

The 'Report Requirements Settings' dialog box is shown. It has several sections for configuration:

- Payment Methods (current episode setting):** A list with 'Uninsured' selected. A 'Display' button is to the right.
- Treatment Locations (when charged):** A list with 'Rooms' selected.
- Charge Types:** A list with 'Treatment' selected.
- Treating Practitioner:** A list with '(Unspecified)' selected. Below it are radio buttons for 'All Staff' and 'Only Employed' (which is selected).
- Text:** 'Normally you will want everything to be reported so simply press Display. You can however focus the account balance report if you want to.' and 'Selecting nothing on a list is the same as selecting everything on a list.'
- Filter:** 'But only entries that include this (word/phrase)' with a text input field.
- Buttons:** 'Display' and 'Cancel'.

- Select required fields or leave blank for everything
- Click Display

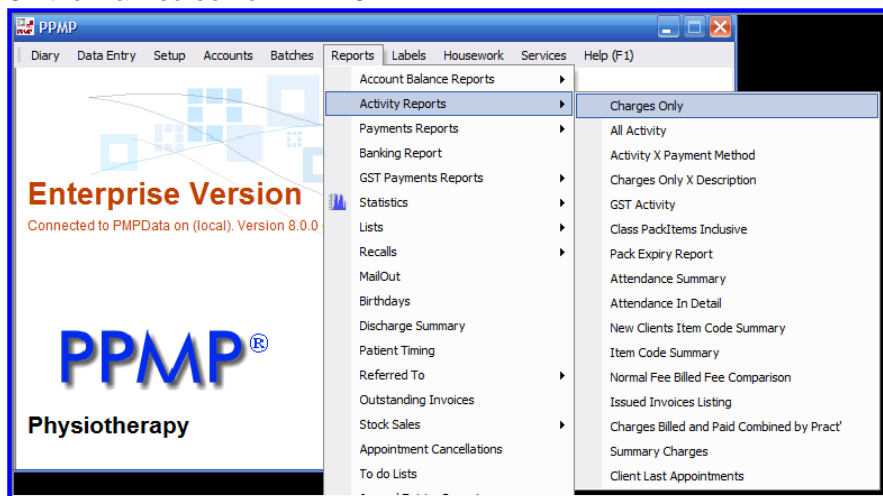
The 'Account Balances' window shows a preview of the report. The title is 'Account Balance Report' and the subtitle is 'Account Balances'. The report is filtered by 'Payment Method : Uninsured'. The table shows balances for three months and the total.

		3+ Months	2 Months	1 Month	This Month	Total
<b>Payment Method : Uninsured</b>						
15317	AARONS Shaun	\$1,108.00	\$0.00	\$0.00	\$0.00	\$1,108.00
4480	ALLEN Des	\$158.95	\$0.00	\$0.00	\$0.00	\$158.95
20859	Annabella Andre Vet	\$439.05	\$0.00	\$0.00	\$0.00	\$439.05

- Report displays

## 27.2 Activity report

On the Main screen of PPMP®



- Reports
- Activity Reports
- Select desired report from this list
- New menu will appear

The screenshot shows the 'Report Requirements Settings' dialog box. It contains several sections for configuring the report:

- Payment Methods:** A list box containing CRS, Uninsured, Private, Workcover, Medicare, D.V.A., INJURY/NET, CDMCARE, and 3RD PARTY.
- Treatment Locations:** A list box containing Rooms, Hospitals, and Home Visits.
- Charge Types:** A list box containing Treatment, STOCK, Australia Post, Workcover Charges, Misc Charge, and Reports.
- Date Range Covered:** Fields for Starting Date (01/06/2013) and Ending Date (20/06/2013), with buttons for Today, This month, Yesterday, and Last month.
- Staff List:** A list box containing (Unspecified), John, Gil Zimmer, Sam, Bradley, Dr Brenda, JOHN TEST, DENT, PHYSIO, and ABC.
- Options:** A checkbox for 'Show Totals Only' and radio buttons for 'All Staff' and 'Only Employed'.
- Filter:** A text field for 'But only entries that include this (word/phrase)'.
- Buttons:** Display, Cancel, and a small button next to the filter field.

- Select required fields and date range
- Click Display

Charges (billing) Report

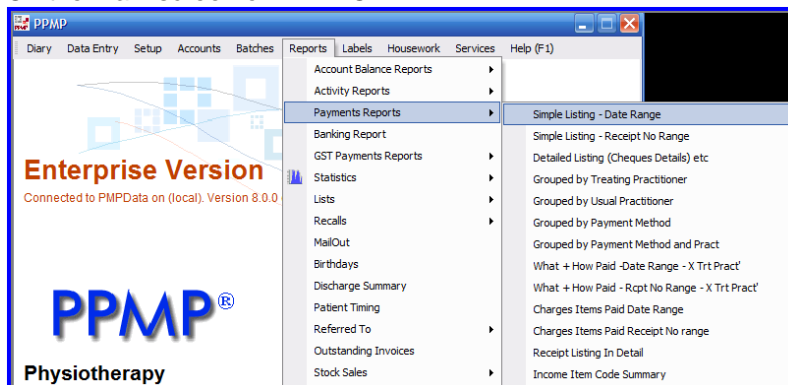
Printed 20/c

Client No	Client Name	Episode title	Description	GST	F
<b>2/04/2013</b>					
PRACTITIONER :- John M dnerney 1					
6,304	READ LYN	massage 09/01	Std Consultation	\$0.00	\$55.
Total for John McInerney				Entry Count 1	\$0.00 \$55.
Total for 2/04/2013				Entry Count 1	\$0.00 \$55.
<b>3/04/2013</b>					
PRACTITIONER :- John M dnerney 1					
6,304	READ LYN	massage 09/01	Std Consultation	\$0.00	\$55.
Total for John McInerney				Entry Count 1	\$0.00 \$55.
Total for 3/04/2013				Entry Count 1	\$0.00 \$55.
<b>Report Totals</b>				Entry Count 2	GST Fees
					<b>Grand Total</b>
Dates from 1/04/2013 to 30/04/2013					

- Report displays

### 27.3 Payments report

On the Main screen of PPMP®



- Reports
- Payment Reports
- Select desired report from this list
- New menu will appear



**Report Requirements Settings**

**Payment Methods**

- CRS
- Uninsured
- Private
- Workcover
- Medicare
- D.V.A.
- INJURYNET
- COMCARE
- 3RD PARTY

**Treatment Locations**

- Rooms
- Hospitals
- Home Visits

**Charge Types**

- Treatment
- STOCK
- Australia Post
- Workcover Charges
- Misc Charge
- Reports

**Date Range Covered**

Starting Date: 01/06/2013  
Ending Date: 20/06/2013

Buttons: Today, This month, Yesterday, Last month

☐ Show Totals Only

**Staff List**

- (Unspecified)
- John
- Gil Zimmer
- Sam
- Bradley
- Dr Brenda
- JOHN TEST
- DENT
- PHYSIO
- ABC

Selecting nothing on a list is the same as selecting everything on a list.

☐ All Staff  
☒ Only Employed

But only entries that include this (word/phrase):

Buttons: Display, Cancel

- Select required fields and date range.
- Click Display

**Payments Listing**

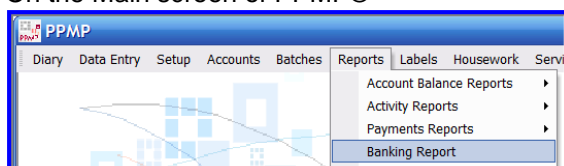
Date	Rcpt#	Client#	Client Name	Cash	Cheque	C/Cards	EFT	Med D
03/04/2013	106588	6304	READ LYN	\$0.00	\$0.00	\$0.00	\$0.00	\$55.00
<b>Totals</b>				\$0.00	\$0.00	\$0.00	\$0.00	\$55.00
<b>Grand Totals</b>				Cash \$0.00	Cheque \$0.00	C/Cards \$0.00	EFT \$0.00	Med D \$55.00
<b>Total for Csh/Chq/CCrd/MedD/EFT</b>				\$55.00				

Dates from 1/04/2013 to 30/04/2013

- Report displays

## 27.4 Banking

On the Main screen of PPMP®



- Reports
- Banking Report

- Click – Preview next Banking - to balance all money OR
- Do a new Banking Report – when you are going to the bank.
- Select Deposit Slip – to view Cheque & Cash Amounts to be banked

**NB:** If you have Alternate Banking Sites set – you can select to do preview banking reports for each different site.  
(See image below)

## 27.5 Statistics report

On the Main Screen of PPMP®

- Go to Reports
- Statistics
- Statistics – Combined Figures

Please indicate which figures you want

Treatment numbers X Practitioner	<input checked="" type="checkbox"/>	Ok
Fees generated X Practitioner	<input checked="" type="checkbox"/>	
Fees generated X Payment method	<input checked="" type="checkbox"/>	Cancel
New episode referral analysis	<input checked="" type="checkbox"/>	
New episode presenting problem analysis	<input checked="" type="checkbox"/>	
New patients practice choice reason	<input checked="" type="checkbox"/>	

Checks that some required info is there, if it isn't it adds it Do this once every month or two before running the stats report.

- Select items you want to show on report
- Click OK

PPMP

NB Please select on the Charge Types list those Charge Types that are to be counted as treatments.

- Click OK

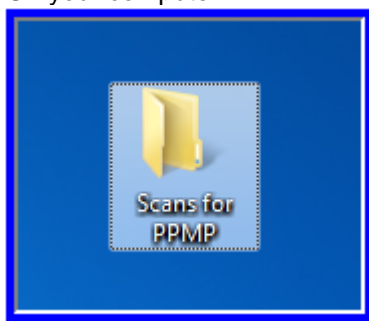
## 28 Scanning and attaching documents to client files

Click [HERE](#) to watch video

- Open Client Details
- Click Episodes
- Click Documents

If you receive new patient forms and other documentation regarding your clients and you would like to save them in your clients file:

On your computer



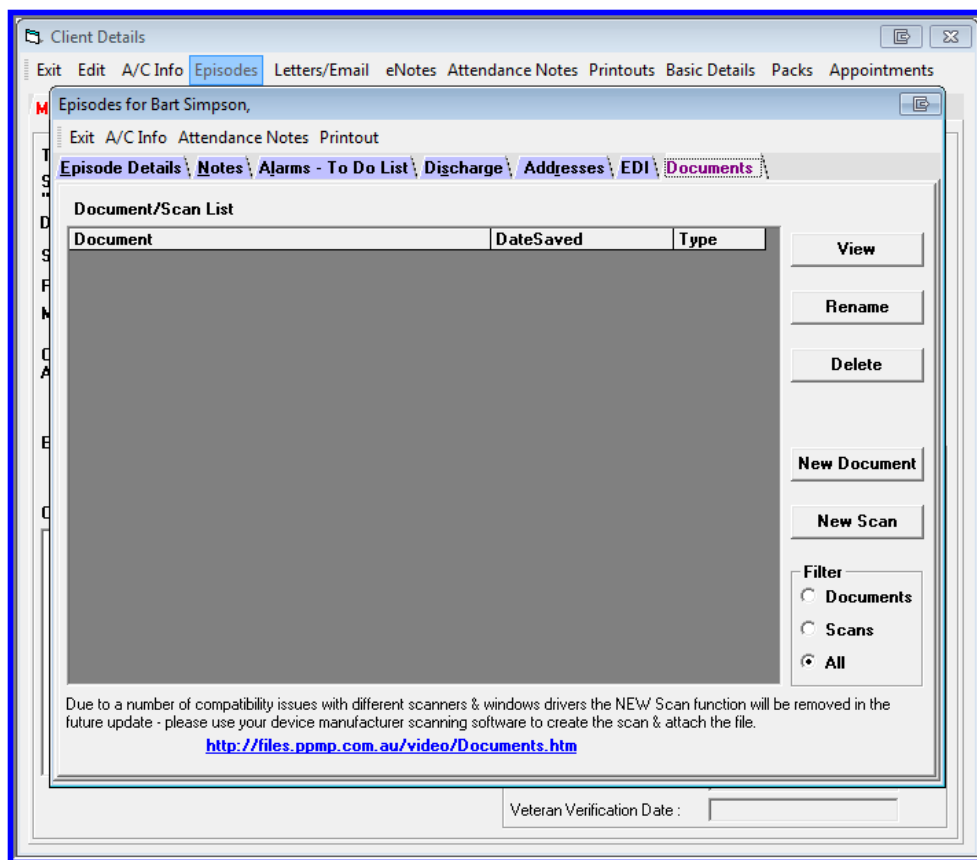
- Make a folder on your Desktop (or My Documents)

Name	Date modified	Type
New patient form 1.5.2015	04/06/2015 1:56 PM	Microsoft Powe

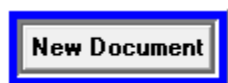
- Scan and save the original to that folder – giving it a specific name.

- Open your client file
- Go to Episodes tab

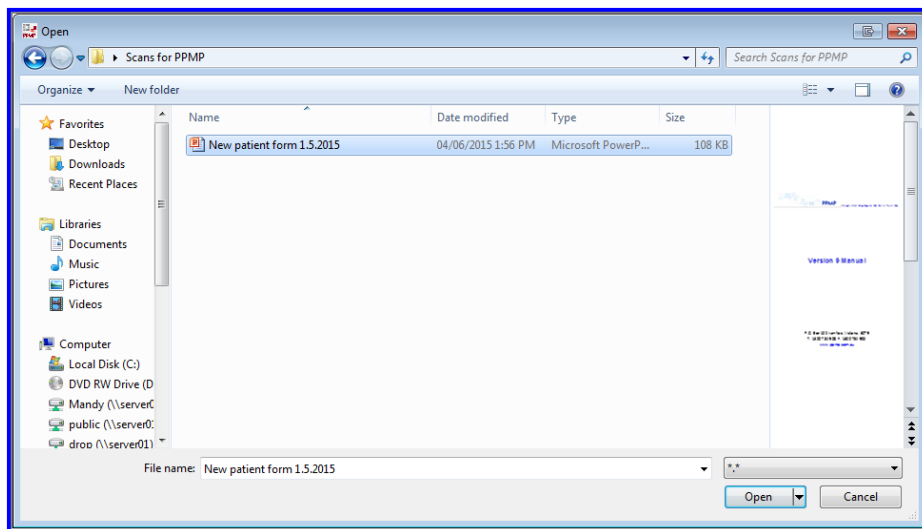
- Select the Correct Episode from the list




- Click Documents



- Click New Document



- Go to the new folder you created on the computer
- Select Document
- Click Open




Episodes for Bart Simpson, 



Exit A/C Info Attendance Notes Printout

Episode Details | **Notes** | Alarms - To Do List | Discharge | Addresses | EDI | **Documents**

**Document/Scan List**

Document	DateSaved	Type
New patient form 1.5.2015.pptx	04 Jun 2015 14:30:17	Doc

**Filter**

☐ Documents

☐ Scans

☒ All

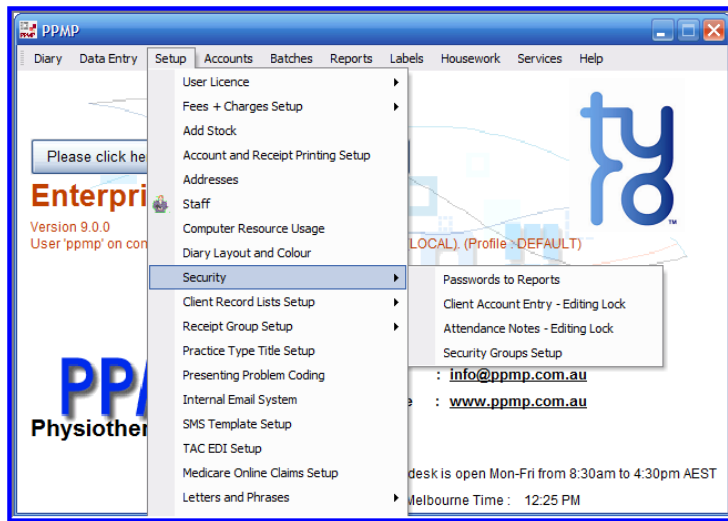
Due to a number of compatibility issues with different scanners & windows drivers the NEW Scan function will be removed in the future update - please use your device manufacturer scanning software to create the scan & attach the file.

<http://files.pmp.com.au/video/Documents.htm>

- Go back to the Document List
- Select the Item from the list
- Click View to see the document in its entirety

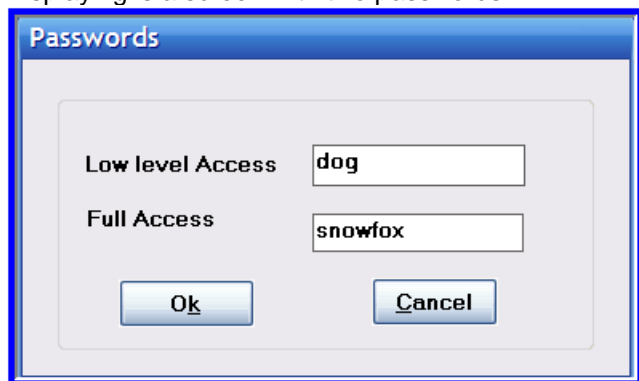
## 29 Security & passwords

### 29.1 To set passwords to reports



- Click on 'Setup' on the main menu
- Click on 'Security'
- Click on 'Passwords to reports'.

Displaying is a screen with two passwords



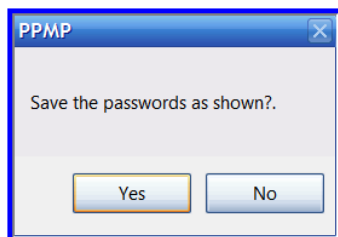
- Click OK

#### **Low level access**

- The password put in this field will allow you access to all the reports.

#### **Full access**

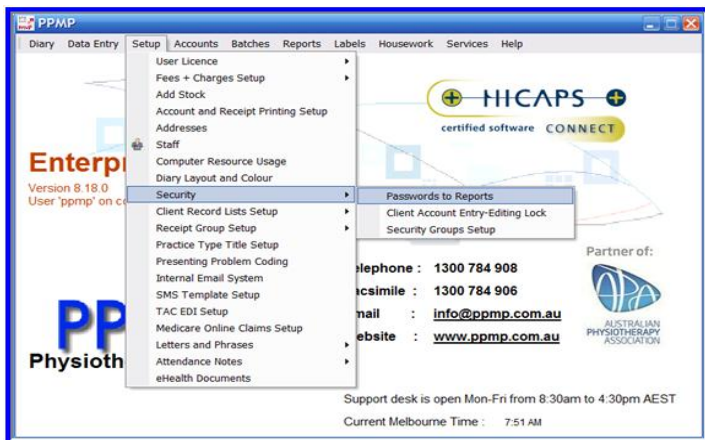
- The password put in this field, will allow you to change both the Low level access and Full access passwords.



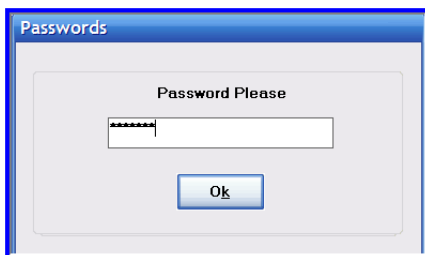
- Click Yes



## 29.2 Changing passwords



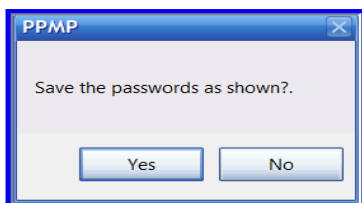
- Click on Setup
- Passwords
- Passwords to reports



- Type in your Full access password
- Click OK



- You can then change the passwords



- Click Yes



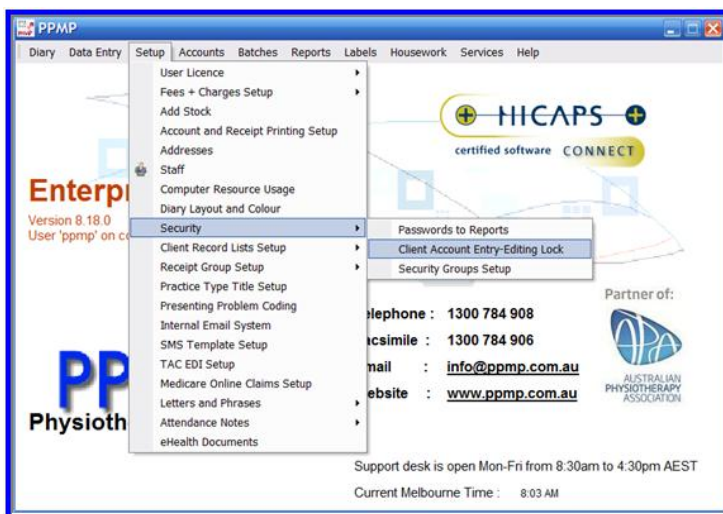
- Go to Reports
- Payments Report
- Simple Listing Date Range



- Enter your “Low Level” Password (frog)
- Click OK
- Continue to your report

### 29.3 Account Edits Lock Setting

Stop people from making changes to information in a client's account history screen so that a password is required to make these changes.



- Click 'Setup' on the main menu for PPMP
- Click 'Security'
- Click 'Client account entry - editing Lock'.



- If this option is selected then PPMP will not ask you for a password if you want to edit a patient's account file.
- Require password after \* days

- If this option is selected then PPMP will ask for a password after the amount (\*) of days has passed.
- Therefore if you want the password to be asked for every time there is a change made in the clients account information screen, set the days to 0. Otherwise you will only be asked after the number of days specified have passed.

#### **29.4 Attendance notes and editing**

This section is there in preparation for Future Development

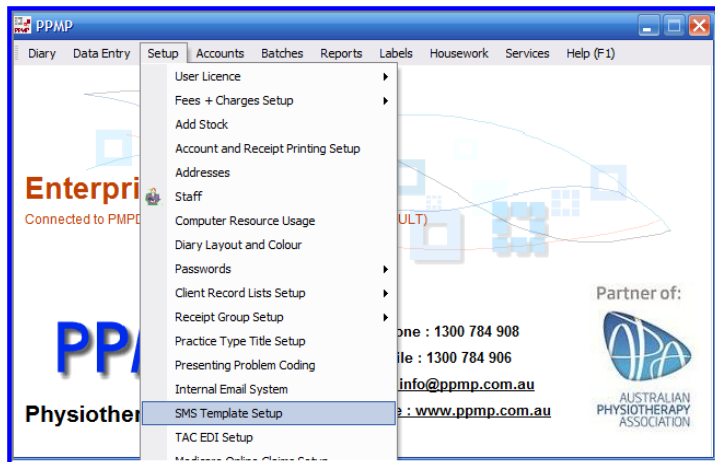
#### **29.5 Security group setup**

This section is there in preparation for Future Development

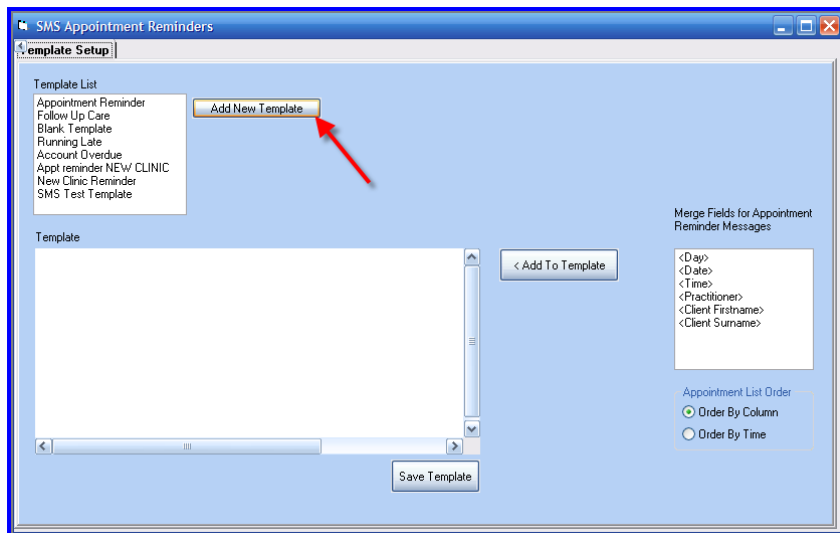
## 30 SMS

### 30.1 SMS template setup

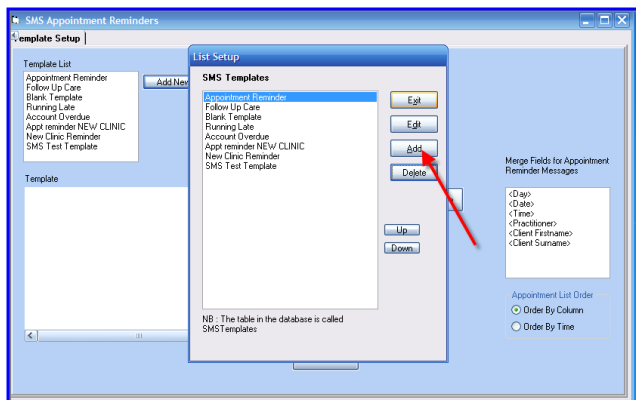
On the Main Menu PPMP®



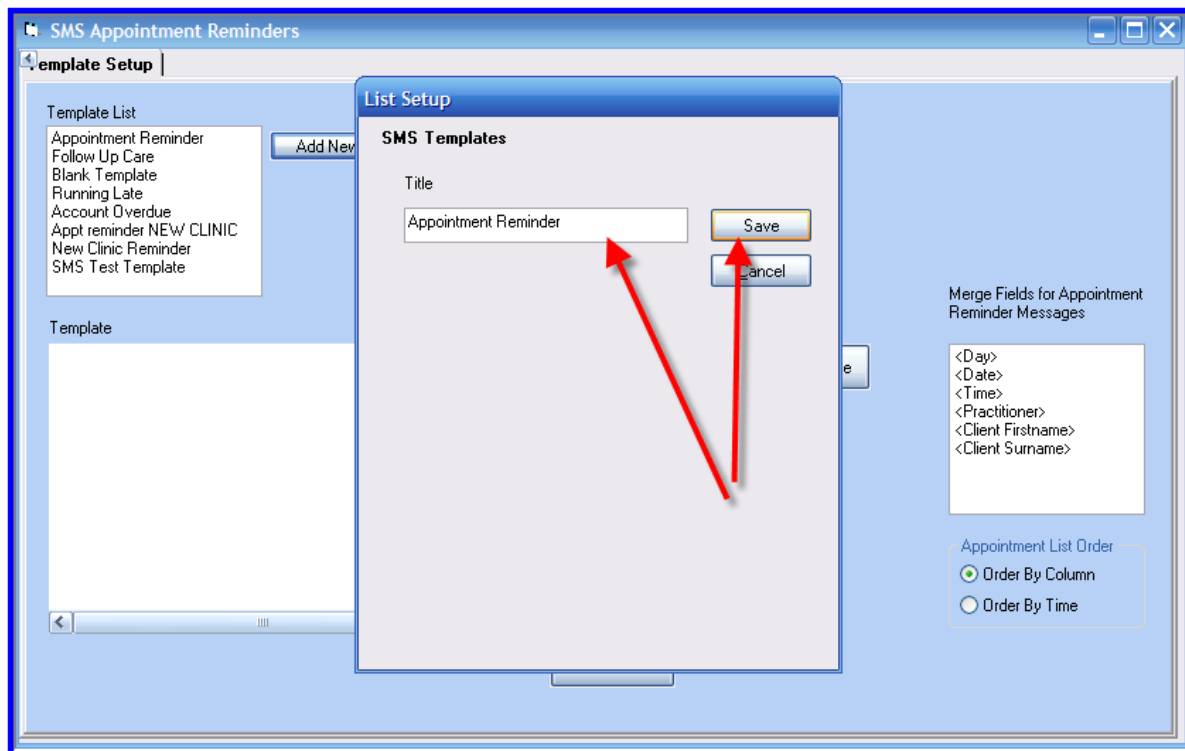
- Go to SMS Template Setup



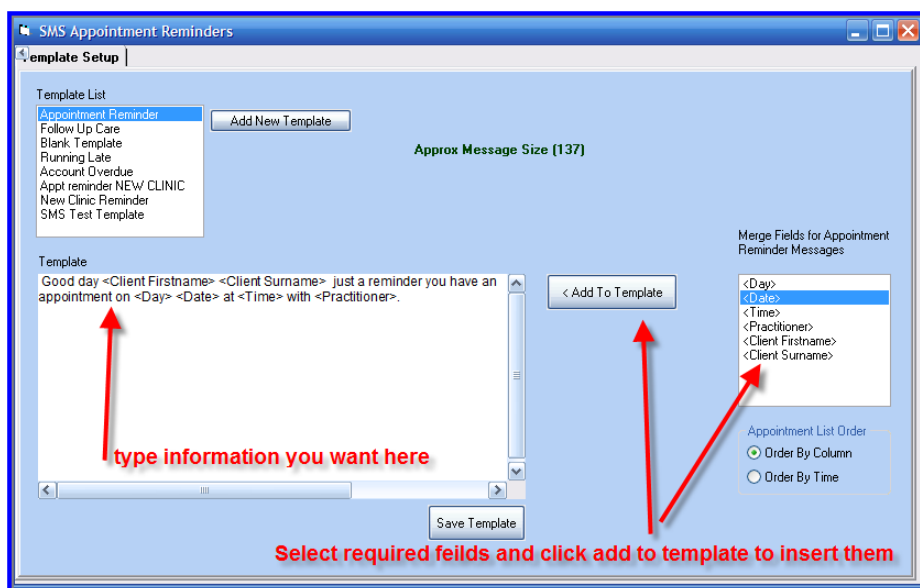
- Click Add New Template



- Click Add



- Type in title for new SMS template
- Click save



- Select the template in the list you want to setup and type in the information you require.
- Click save template.

**NB:** The Approximate message size will also be displayed and how many messages you will be charged for (see examples below)

**SMS Appointment Reminders**

**Template Setup**

Template List

- Appointment Reminder
- Follow Up Care
- Blank Template
- Running Late
- Account Overdue
- Appt reminder NEW CLINIC
- New Clinic Reminder
- SMS Test Template

Add New Template

Approx Message Size (133)

Message size displayed here

Template

Good day<Client Firstname> <Client Surname> just a reminder you have an appointment on <Day> <Date> at <Time> with <Practitioner> .

< Add To Template

Merge Fields for Appointment Reminder Messages

- <Day>
- <Date>
- <Time>
- <Practitioner>
- <Client Firstname>
- <Client Surname>

Appointment List Order

- ☒ Order By Column
- ☐ Order By Time

Save Template

**SMS Appointment Reminders**

**Template Setup**

Template List

- Appointment Reminder
- Follow Up Care
- Blank Template
- Running Late
- Account Overdue
- Appt reminder NEW CLINIC
- New Clinic Reminder
- SMS Test Template

Add New Template

SMS's greater than 160 Characters will be sent and charged as 2 messages  
Approx Message Size (185)

Template

Good day<Client Firstname> <Client Surname> just a reminder you have an appointment on <Day> <Date> at <Time> with <Practitioner> .  
Please call us on 1300 784 908 if you cannot attend.

< Add To Template

Merge Fields for Appointment Reminder Messages

- <Day>
- <Date>
- <Time>
- <Practitioner>
- <Client Firstname>
- <Client Surname>

Appointment List Order

- ☒ Order By Column
- ☐ Order By Time

Save Template

Displayed is message size and information that it the SMS will be sent as 2 messages.

### 30.2 How to send an SMS

There are a number of ways to send an SMS.

- First select the patient or patients you wish to send an SMS to.
- Either individually

<b>S-Mouse Mickey</b>

OR

- Select the whole column by clicking on the practitioner name. (The whole column will be highlighted.)

Sam 11
S-SMITH Amanda
YEO Min
RADFORD Lisa
HAGUE Jeffrey
MACDONALD CHERYL
UNSWORTH MAXINE*
Lunch
Lunch
MAY JANET

- Next on the PPMP® Diary page you will see the menu SMS Apt Reminders.

**SMS sending options found here as well as the SMS message log**

- The top 3 options will bring you up the template window that you have already set up.

**SMS Appointment Reminders**

Select Template To Use | Review Messages/Recipients and Send

STEP 1 : Choose a template or manually enter your own

STEP 2 : Click here to get a list of the reminders that will be sent

**Select a Template to use for the Reminders**

- Appointment Reminder
- Follow Up Care
- Blank Template
- Running Late
- Account Overdue
- Appt reminder NEW CLINIC
- New Clinic Reminder
- SMS Test Template

**Next Step**

**Now Edit OR Create Your Message Template below**

**Appointment Reminder Template Editor**

Appointment Reminder Merge Fields

- <Day>
- <Date>
- <Time>
- <Practitioner>
- <Client Firstname>
- <Client Surname>

- Select the specific template you would like to use (or you can build a new one if needed here)
- Click Next Step.

**SMS Appointment Reminders**

Select Template To Use | **Review Messages/Recipients and Send**

Reminder List : ( 10 Items)

Sent	Client No	Client Name	Appt Date	Appt Time	Practitioner	Phone
1	No	5840 [1] SMITH AARON	21/06/2013	10:00am	John McInerney	926543892
2	No	14067 CRAIG Shelly	21/06/2013	12:00pm	John McInerney	0413 748 262
3	No	16153 FRANKLIN Clayton	21/06/2013	2:45pm	John McInerney	0403 690 099
4	No	11976 O'BRIEN Brad	21/06/2013	10:30am	Sam Ziggy	0438962124
5	No	19761 NANDA Nipun	21/06/2013	3:30pm	Sam Ziggy	0434 287 593
6	No	12387 GRAHAM Michael	21/06/2013	4:15pm	Sam Ziggy	0414 507 450
8	No	19859 JONES Ben	21/06/2013	11:45am	Dr Brenda Reed	0417648077
9	No	16639 DERRY Paul	21/06/2013	3:00pm	Dr Brenda Reed	0433 176 980
10	No	9072 GALE Sean	21/06/2013	3:45pm	Dr Brenda Reed	0427581373

**Send SMS Reminders Now**

**Delayed Send Of Reminders**

**Remove Reminder**

**Message Preview** (you can edit this message before sending if you like)

Hello Sean GALE  
You have an appointment on Fri 21/06/2013 at 3:45pm with Dr Brenda Reed  
Please call if you cannot attend on 1300 784 908.

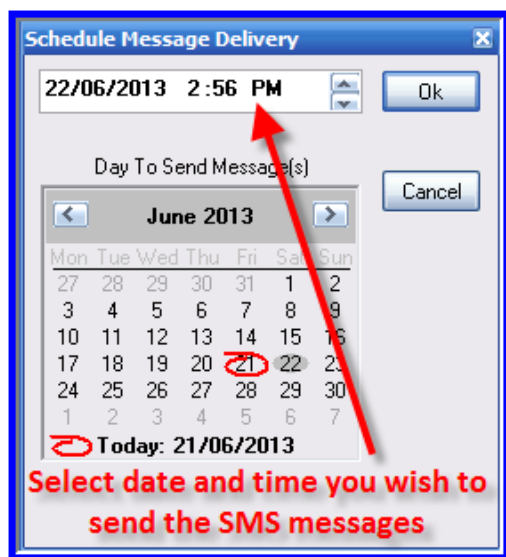
**Send, delay or remove**

☐ Don't mark the appointments

**NB : Successfully sent messages will be marked on the diary. Click Refresh on the diary if you wish to see the marks immediately.**

- From here you can send the SMS messages straight away, delay them or remove specific clients from the list with the 3 buttons on the right hand side.
- If you are going to delay the sending of the SMS messages you will have a new menu open up.





- Select the date and time from here you wish the SMS messages to be sent.
- Click OK when happy with your selection

### 30.3 [Sending bulk SMS messages to multiple clients](#)

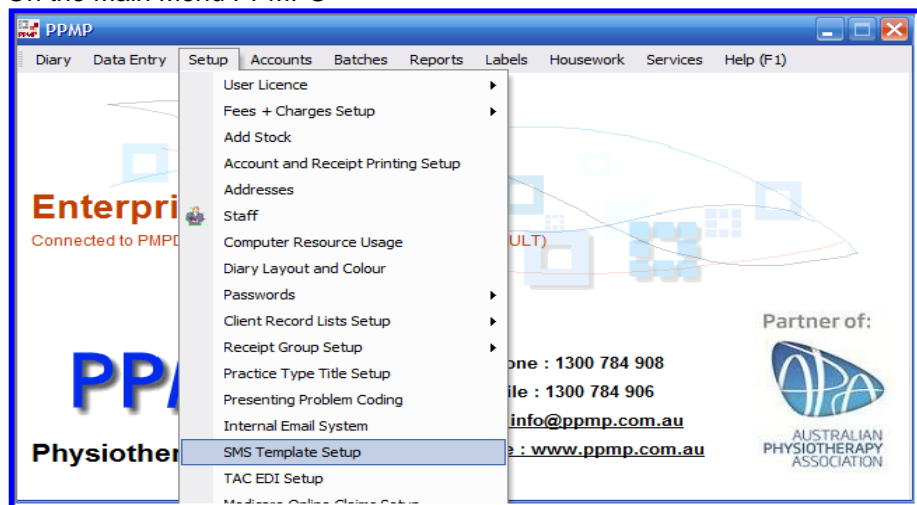
Click [HERE](#) to watch video

You have the ability within PPMP® to send bulk or group messages via sms at one time. For example, you may like to send out a holiday specific message to all of your clients. Remember the size of the template will depend on how many sms message are sent. (Anything over 160 characters will be charged and sent as 2 sms messages.) Please check with us if you are sending over 1000 sms messages in a day as limits may apply.

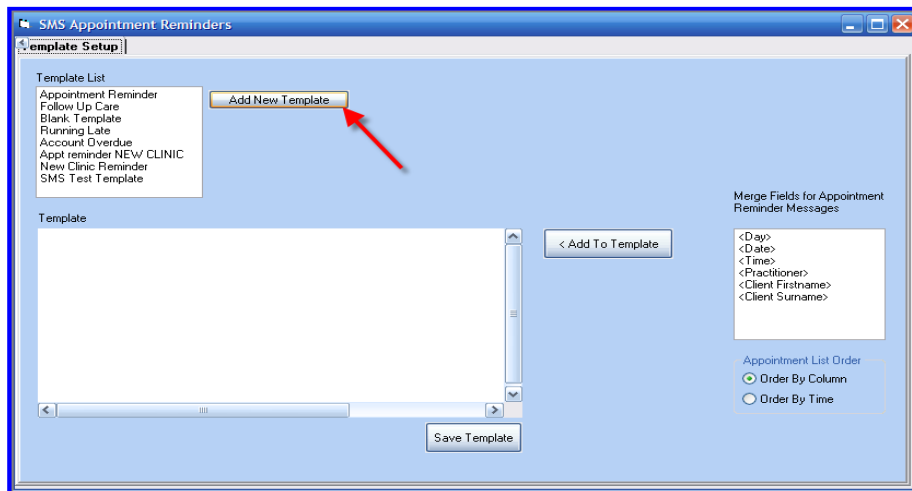
### 30.4 [Design SMS templates and sending of SMS](#)

First design the template to be used

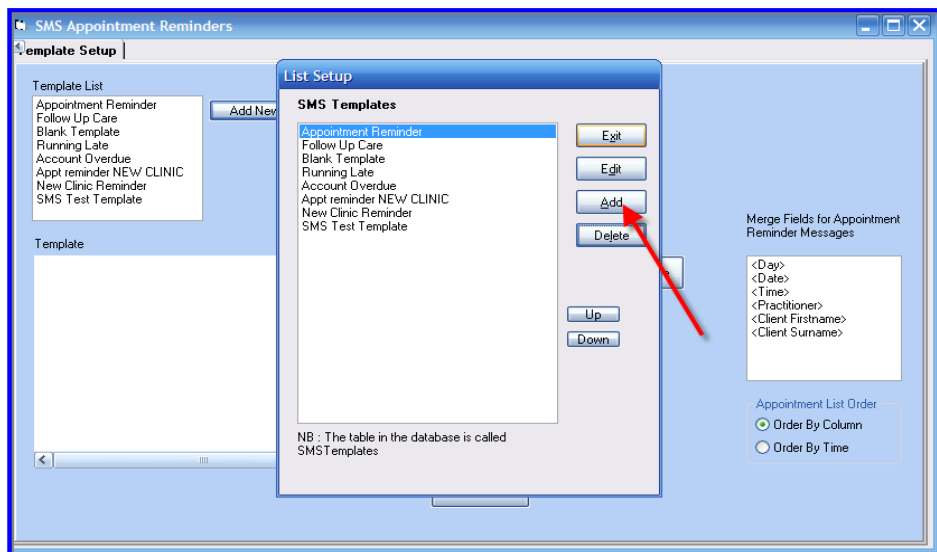
On the Main Menu PPMP®



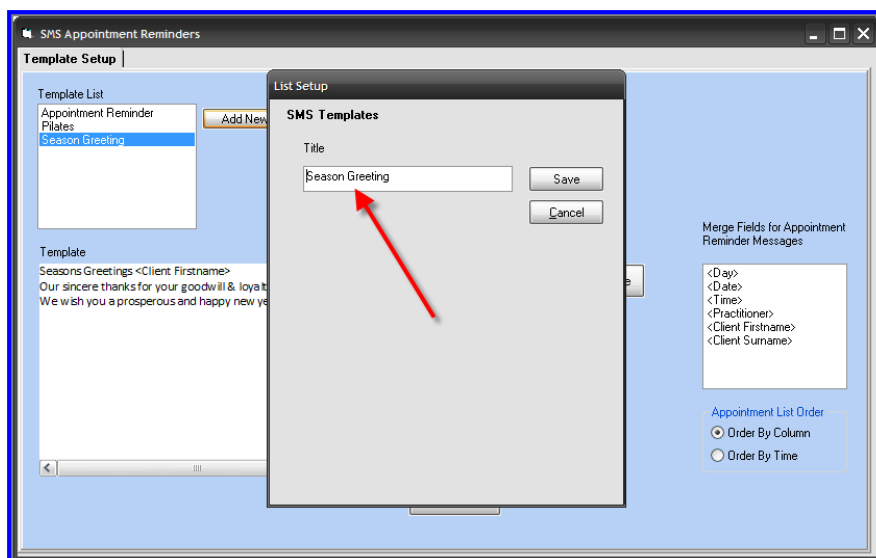
- Go to SMS Template Setup



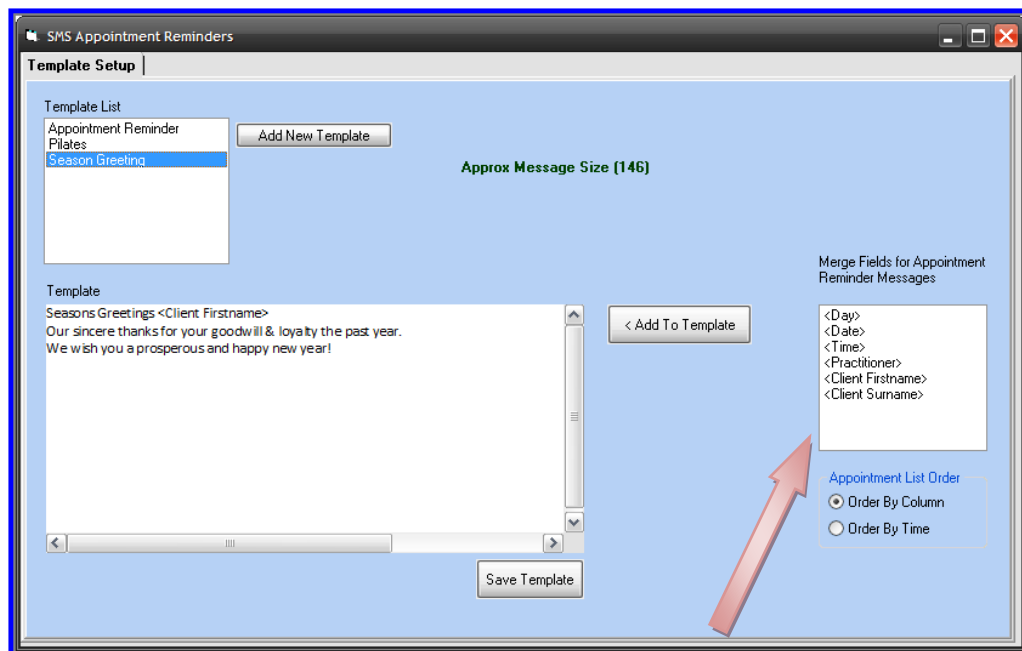
- Click Add New Template



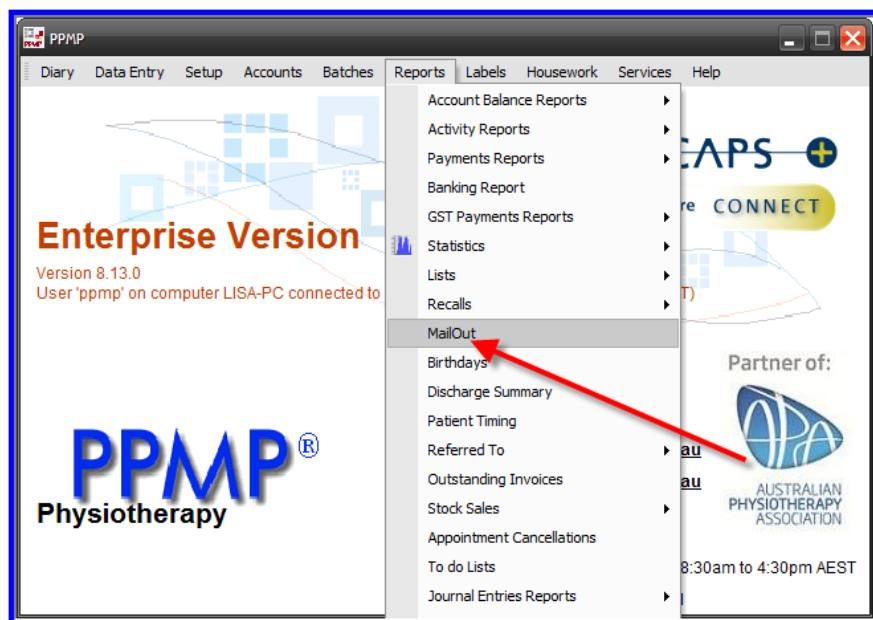
- Click Add



- Type in title for new SMS template
- Click save



- Select the template in the list you want to setup and type in the information you require (or select from the merge fields on the right)
- Remember the size of the template will depend on how many sms message are sent. (Anything over 160 characters will be charged and sent as 2 sms messages.)
- Click save template.



- Go to the reports screen and select the MailOut option

Report requirements settings

Client Details Selection Criteria

Episode Details Criteria

In The Date Range From 01/01/1980 To 06/12/2013

Amount\$ Billed

>= or <

This Amount 100.00

Add Up

All Charges

Just Selected Item Codes

(NB An amount of 0.00 means this test is not performed)

Has been billed for Item Codes . . .

1 :- Tape

LEGAL :- Legal report

REP :- solic rep

From These Charge Types

Treatments

stock

reports

Build The List

Cancel

- Select the required Filters Tab / Fields
- Click Build List

PPMP

10 Clients had a mobile number.  
They have had 'Yes' changed to 'No' on the list.  
This list is now being sent to the email window  
for you to write the email to send to each of them.

OK

- You will receive a message telling you how many clients had mobile numbers
- Please check with us if you are sending over 1000 sms messages in a day as limits may apply.

There are 12 patients listed.

No	Name	Print?	Post Code
5	Amadolois, Aristotle	Yes	0
6	Brockman, Kent	Yes	0
9	Charming, Prince	Yes	0
8	Disco, Stu	Yes	0
10	Elephant, Dumbo	Yes	0
11	Flander, Ned	Yes	0
7	Godmother, Fairy	Yes	0
12	Hibbert, Dr Julius	No	0
14	Little, Chicken	Yes	0
16	Row, Doctor	Yes	0
4	Simpson, Homer	No	0

Print listing

Print labels

Create Merge File

Print Memon Letters

Only lines . . .

From 0

To 0

You are on line 0

Email

Send SMS

Exit

Mark All Yes Mark All No Reverse Mark

- You will notice on your list that those who have mobile numbers have had Yes changed to NO (this is so those that don't have mobile numbers can be contacted by an altenate method)
- Click Send SMS

**SMS Appointment Reminders**

Select Template To Use | Review Messages/Recipients and Send

STEP 1: Choose a template or manually enter your own

**Select a Template to use for the Reminders**

Appointment Reminder  
Plates  
Season Greeting

**Next Step**

STEP 2: Click here to get a list of the reminders that will be sent

**Now Edit OR Create Your Message Template below**

**Appointment Reminder Template Editor**

Seasons Greetings <Client Firstname>  
Our sincere thanks for your goodwill & loyalty the past year.  
We wish you a prosperous and happy new year!

**Appointment Reminder Merge Fields**

<Day>  
<Date>  
<Time>  
<Practitioner>  
<Client Firstname>  
<Client Surname>

- Select your Template
- Click Next Step

**SMS Appointment Reminders**

Select Template To Use | **Review Messages/Recipients and Send**

Reminder List: (10 Items)

Sent	Client No	Client Name	Appt Date	Appt Time	Practitioner	Phone
1 No	5	Mr Aristotle Amadololis				61400000000
2 No	6	Mr Kent Brockman				61400000000
3 No	9	Mr Prince Charming				61400000000
4 No	8	Mr Stu Disco				61400000000
5 No	11	Mr Ned Flander				61400000000
6 No	7	Ms Fary Godmother				61400000000
7 No	12	Mr Dr Hibbert				61400000000
8 No	14	Mr Chicken Little				61400000000
9 No	3	Master Bart Simpson				61400000000
10 No	4	Mr Homer Simpson				61400000000

STEP 3: click here to send the reminders

**Send SMS Reminders Now**

**Delayed Send Of Reminders**

**Remove Reminder**

**Message Preview** (you can edit this message before sending if you like)

Seasons Greetings Homer  
Our sincere thanks for your goodwill & loyalty the past year.  
We wish you a prosperous and happy new year!

- Make sure ALL mobile numbers are in the correct format (it makes no difference if you have "61" at the beginning or if you have spaces "0400 000 000")

**Send SMS Reminders Now**

- Once you have checked the mobile numbers and you have selected the correct template – Click Send

**SMS**

SMS messages have been sent.

**OK**

- You will receive the above message when SMS's have been sent

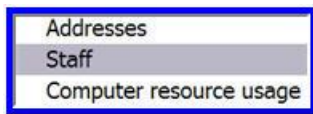
### 31 Staff setup (additional information)

Click [HERE](#) to watch video

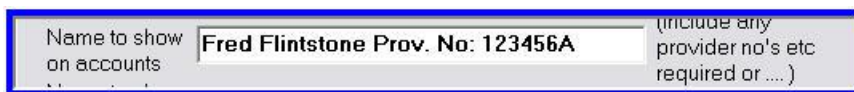
On the main PPMP® Screen



- Click Setup



- Click on Staff (we have already setup most of this in the wizard setup).



- In Name to show on Accounts we need to insert the Practitioners Surname and Provider Number



- Click Save



- Click Exit.

#### 31.1 Setting staff names on columns

Dr Brenda 8	Times
	9:00am
[-1] Mouse Mickey	9:15am
	9:30am
	9:45am

- At the top of each column the name of the practitioners using that column should appear.
- The name or staff member at the top of each diary column indicates who is being credited with the work being done in that column.

Account details for Mickey Mouse												
Episode test		Unpaid Total : \$630.00				Net A/C Bal : \$630.00						
Client No. 20800		Deposit \$0.00				GST Bal : \$0.00						
Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location
27/04/2012	500 Initial Consultation JM	1		115.00			115.00	115.00		1		36 Rooms
04/05/2012	class - class	1		200.00			200.00	315.00		1		36 Rooms
04/05/2012	class - class	1		200.00			200.00	515.00		1		45 Rooms
21/06/2013	500 - Initial Consultation	1		115.00			115.00	630.00		1	Dr Brenda	Rooms

- When you record a treatment from the diary, the practitioner whose name appears at the top of that column is credited with having treated that patient.

- When you are in the charge window you will see a setting at the bottom of the charge window for the practitioner, episode, etc. these can be changed by clicking on drop down buttons or clicking on a different location.

### 31.2 Changing practitioner on the diary

You can change the name allocated to a particular column on a particular day.

- Click in the first column.

- Then click Actions

- Change Column Practitioner

- Click on the practitioner's name then click 'Select'

- The name will then appear on the diary in that column on that day.

### 32 Standard entries

Click [HERE](#) to watch video

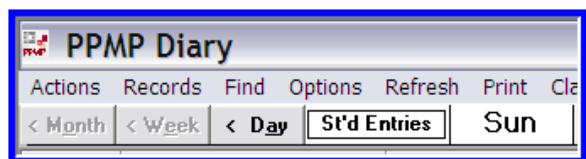
#### **Setting up a standard or default diary layout**

Naturally you won't want to have to allocate every column on every day manually. The diary has a standard layout facility. From within the diary:-

From the Diary - Click on "Options"



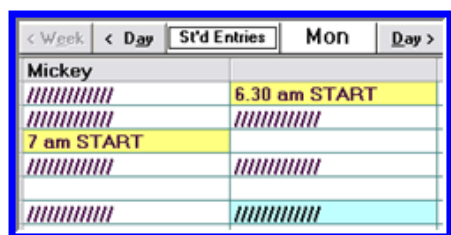
- Choose Diary Standard entries



- The diary will jump to the Sunday of the standard layout area.



- Allocate staff to each column on each day from that Sunday through to the following Saturday.



- You can also fill in the middle parts of the diary pages reserve signs (Actions -> Reserve) perhaps notes like Start Times etc., as you would to layout an appointment book.



- Click on the 'Today' button.
- These will then become the default settings unless you override them by directly selecting a practitioner for a particular day.

Dr Brenda 8	Times
	9:00am
[-1] Mouse Mickey	9:15am
	9:30am
	9:45am

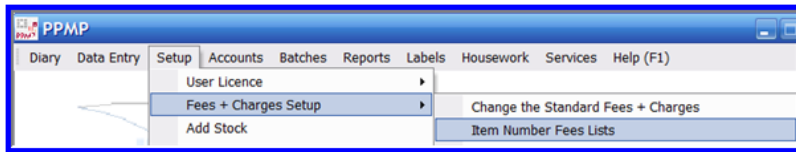
- NB These changes will only be reflected in days more than 14 days in the future from today. Days on the diary more recent than that will need to be individually adjusted



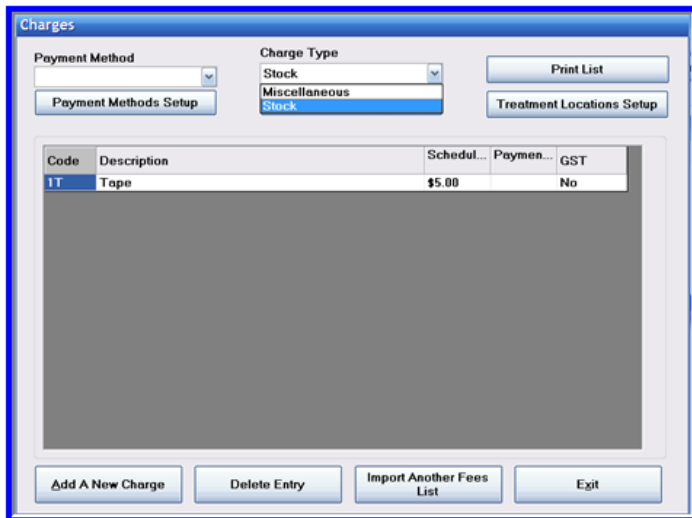
### 33 Stock - Additional fees & charges

Click [HERE](#) to watch video

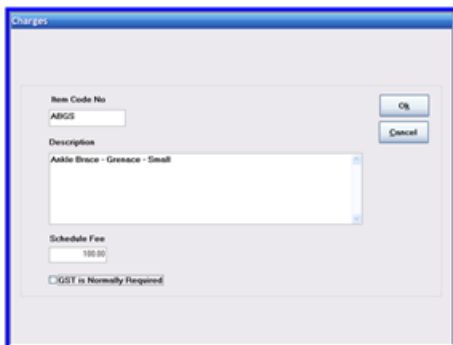
Main Menu PPMP®



- Click Setup
- Click Fees & Charges Setup
- Click Item Number Fees List (This is where you set up your stock list)



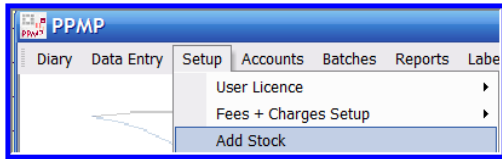
- Make sure you select the correct "Charge Type"
- Click Add a New Charge



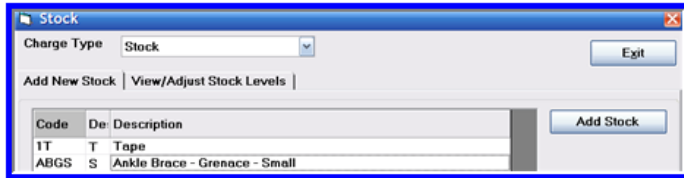
- Build your list of stock items
- Give each stock item an Item Code No (abbreviated description)
- Tick the GST box if you want this item to automatically have GST added each time that it is used.
- You can add stock in, and as you use this item to sell stock it will reduce the level on hand.

### 33.1 Add stock amounts

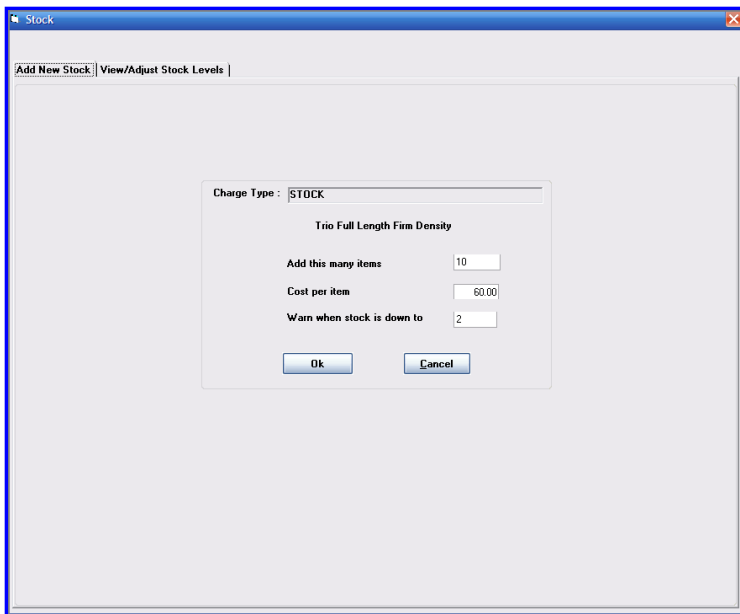
Main Menu PPMP®



- Click Setup
- Click Add Stock (this will bring up the Add Stock window)



- Firstly make sure the charge type at the top is correct
- Select the item you wish to add stock too, by highlighting it.
- Click on the '**Add Stock**' button and enter the information into the fields as follows.



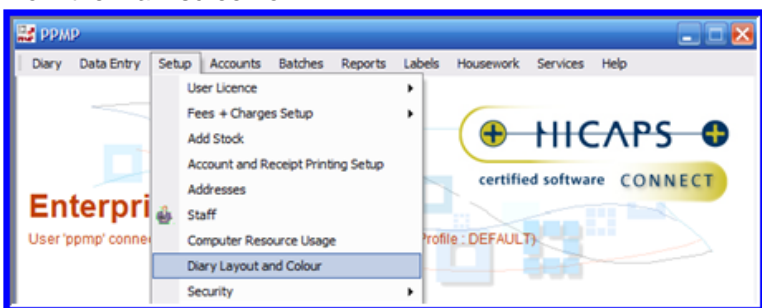
- **Add this many items** - In this field you add the number of stock you have just received.
- **Cost per item** - In this field enter the cost **you paid** for each item.
- **Warn when stock is down to** - In this field you enter the number of stock at which you wish to be warned that the number of items in stock is at a low level and need to be re-ordered.

**To reduce the stock level for an item** - add a negative number of stock items.

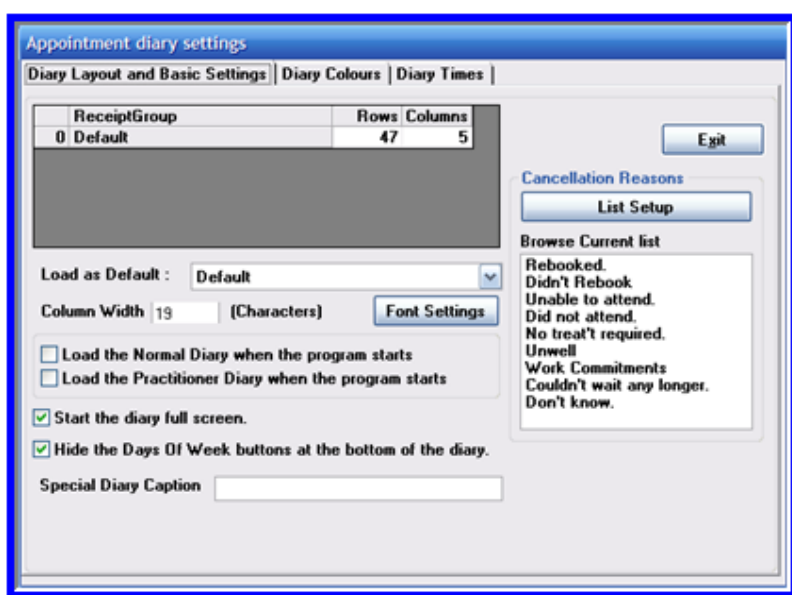
On the reports menu you will see reports listed for stock items, sales, and stock on hand etc.

### 34 Times columns - adjusting/inserting

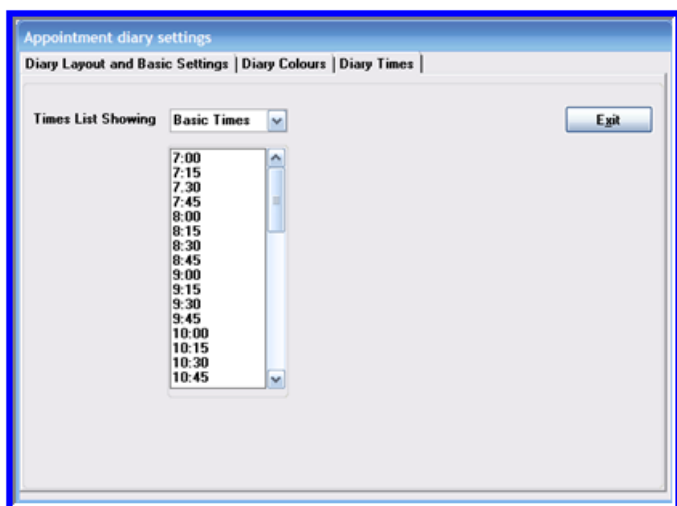
From the Main screen of PPMP



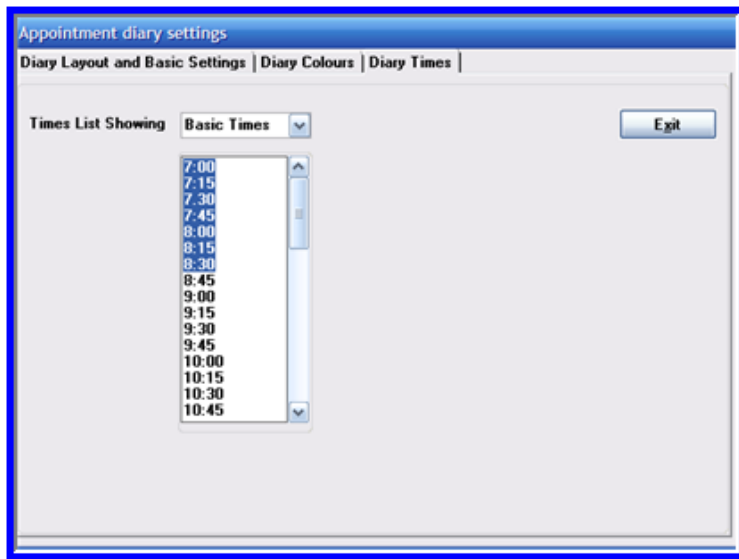
- Go to Setup
- Diary Layout & Colour



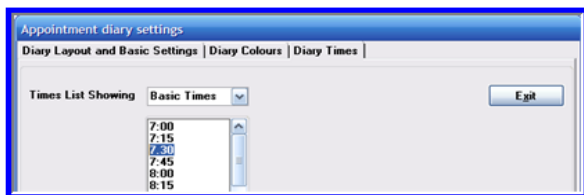
- Add Additional Columns or Rows
- Click on Diary Times Tab



- The Basic Times column relate to the times on the left hand side of your diary
- You can adjust the times by inserting or deleting times



- Highlight a group and Delete



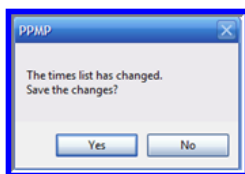
- Or highlight individual times and Delete
- Or over ride with new times



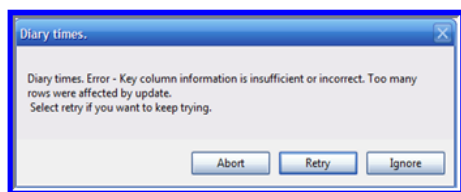
- Click on drop down arrow and select an Alternate Times



- Add the times you want (10 mins, 15 mins, etc)
- Click Exit (when you have finished inserting/deleting times)



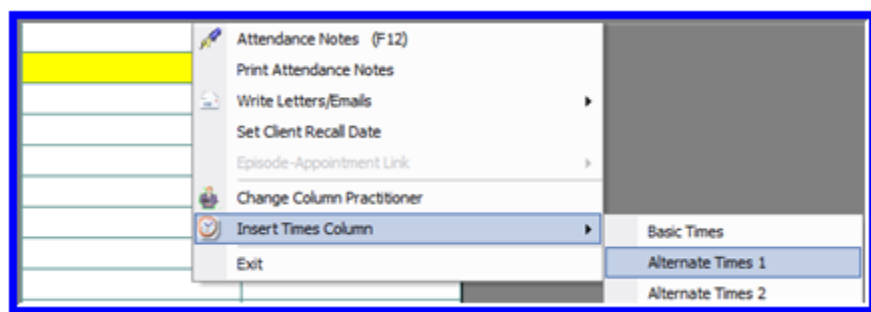
- Click Yes



- Click Ignore
- Open PPMP

### Insert an Additional Times Column

**NB:** Please note that when inserting a “Times Column” make sure the column is completely empty (no appointments or notes).



- Right click in the column you want to make a “Times Column”
- Select Insert Times Column
- Select Alternate Times (that you created)

### 35 Upgrade PPMP®

(MAKE SURE ALL OTHER APPLICATIONS ARE CLOSED - Including any Word documents, emails, etc.)

When an update is available for PPMP® the main screen of PPMP will display the

On the Main Screen of PPMP®



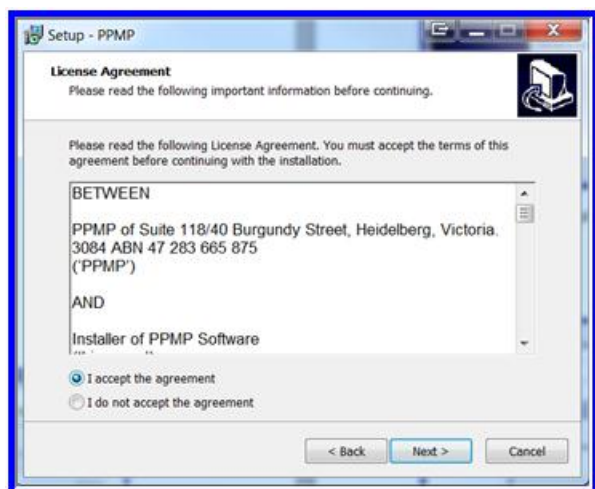
- Click Help
- Select Check for Updates



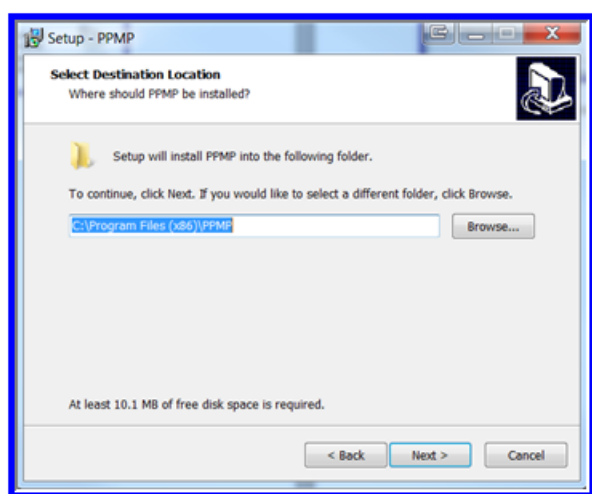
- Program is connecting to PPMP® Server & Downloading Files



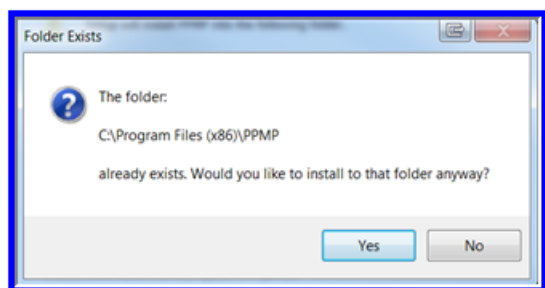
- Welcome Wizard will display PPMP® Version number that will be installed on your computer
- Click Next



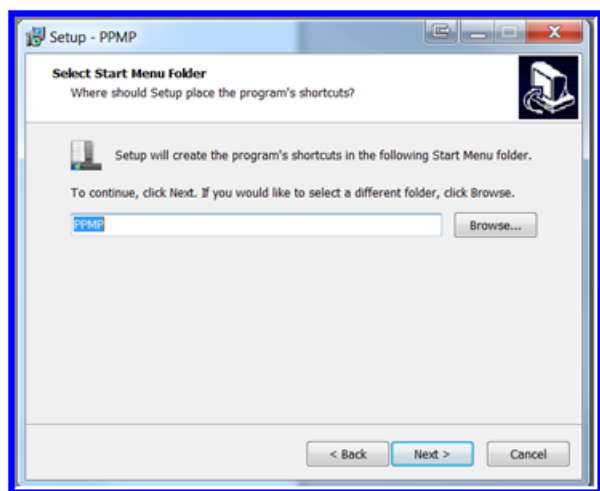
- Click I Accept the Agreement
- Click Next



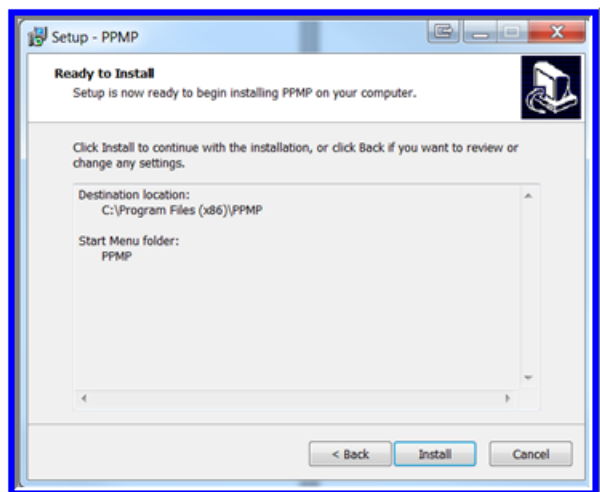
- Click Next



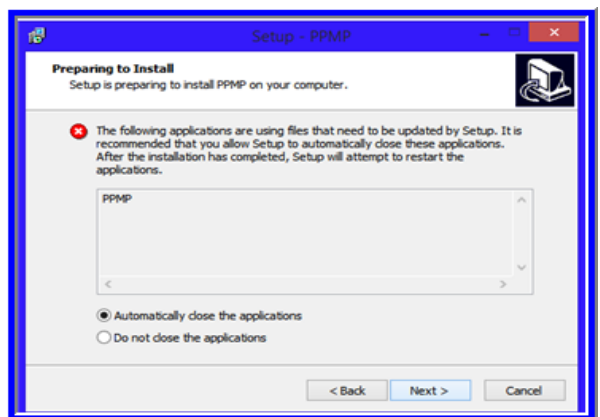
- Click Yes



- Click Next

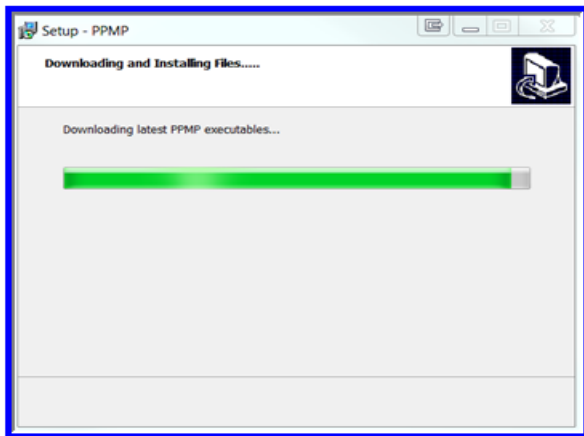


- Click Install

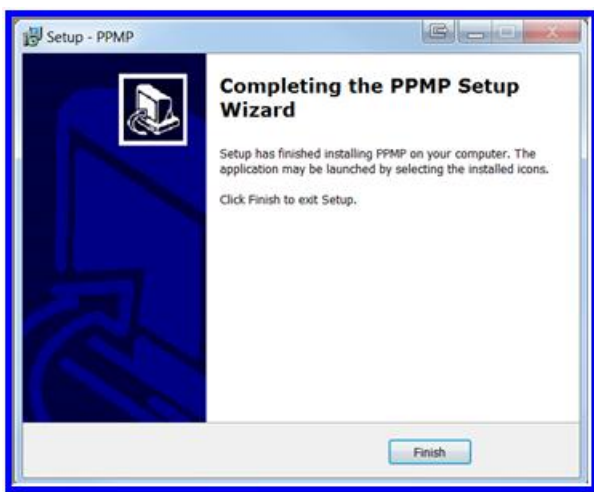


- Click Next





- Downloading and installing files ... please wait



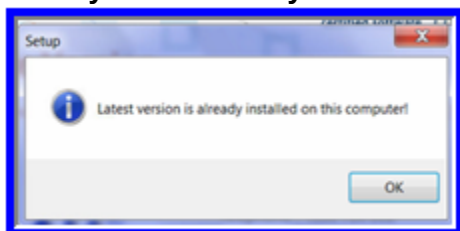
- Click Finish

#### Open PPMP®



- Please Note the New Version number on the Main Screen of PPMP®

**NB: If you are already on the latest Version you will receive the following information**

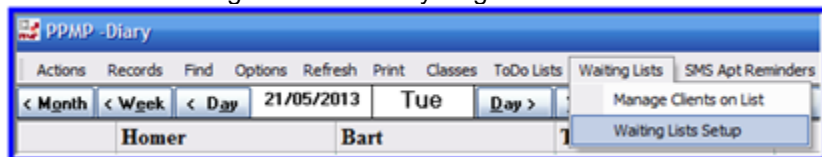


- Click OK

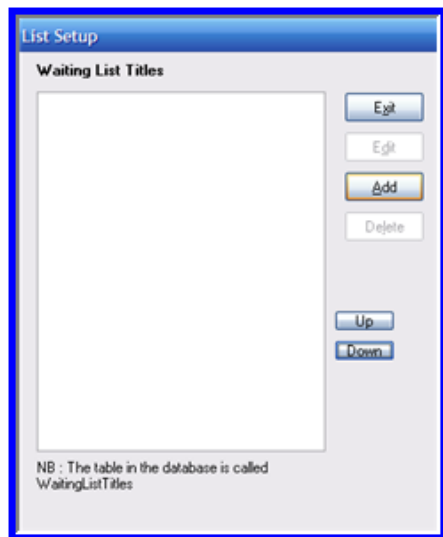
### 36 Waiting lists

Click [HERE](#) to watch video

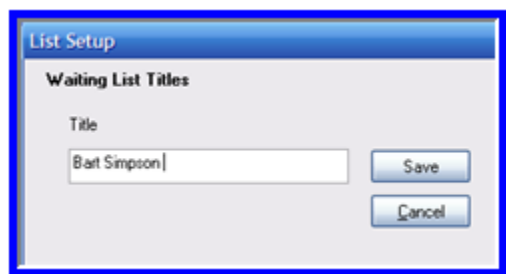
To Create a Waiting list on the Diary Page



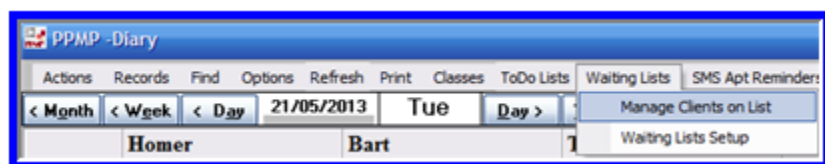
- Go to Waiting Lists
- Waiting Lists Setup



- Click Add



- Enter in List Name
- Click Save
- Exit



- On the Diary Page
- Click Waiting Lists
- Manage Clients on List

**Waiting Lists**

Waiting Lists

Bart Simpson

Exit

Clients

Client#	Name	Date Added
39	Mr Mickey Mouse	21 May 2013 11:15:05

Add Client To List

Delete Client From List

Waitlist Notes for Mr Mickey Mouse

Hurt knee at football training

Save Note

- Select Waiting List Title
- Click Add Client to List
- Add any notes referring to this client
- Click Save Notes
- Exit

**When Appointment becomes available**

- Select Appointment Time on Diary

**PPMP -Diary**

Actions Records Find Options Refresh Print Classes

- Appointment Existing Client (F5) F5
- Appointment New Client (F2) F2
- Appointment Types
- Appointment Reoccurring
- Class Booking
- Appointment From Waiting List

- Click Actions
- Select Appointment from Waiting List

Waiting Lists

Waiting Lists

Bert Simpson

Exit

Clients

Client#	Name	Date Added
39	Mr Mickey Mouse	21 May 2013 11:15:05

OK

Waitlist Notes for Mr Mickey Mouse

Hurt knee at football training

- Select List Title
- Select Client
- Click OK

9:00      Mouse Mickey :

- Client is transferred from Waiting List to Appointment on the Diary