PPMP

PRACTICE MANAGEMENT SYSTEMS

Version 9 Manual

P.O. Box 102 Ivanhoe, Victoria, 3079
T: 1300 784 908 F: 1300 784 906
www.ppmp.com.au

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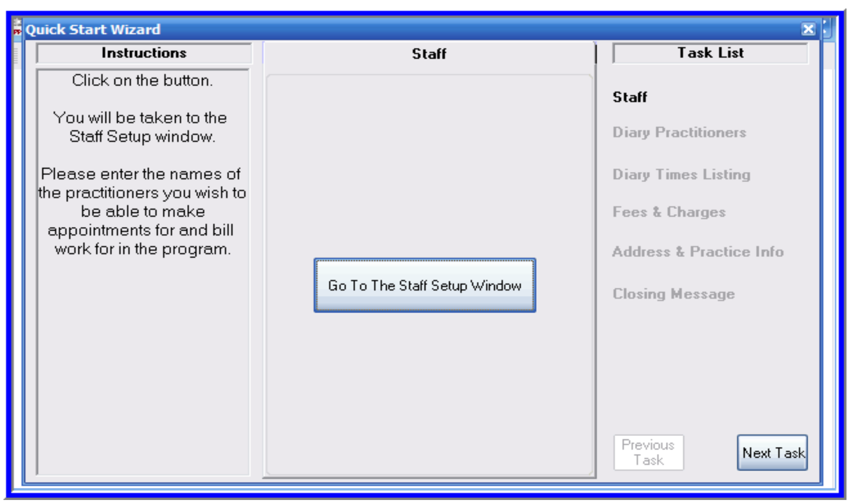
Section 1 – New user setup guide

Program Setup Wizard

Click HERE to watch video

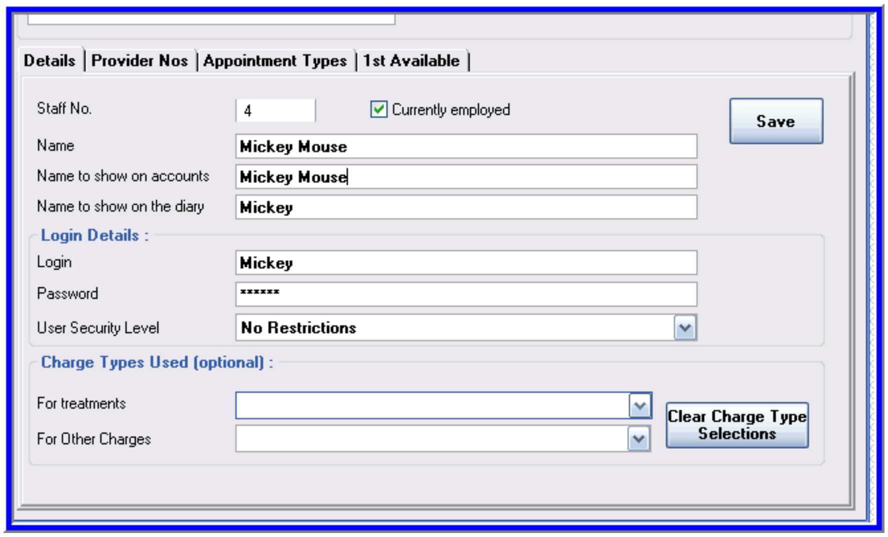
Getting Started & Program Setup Guide

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



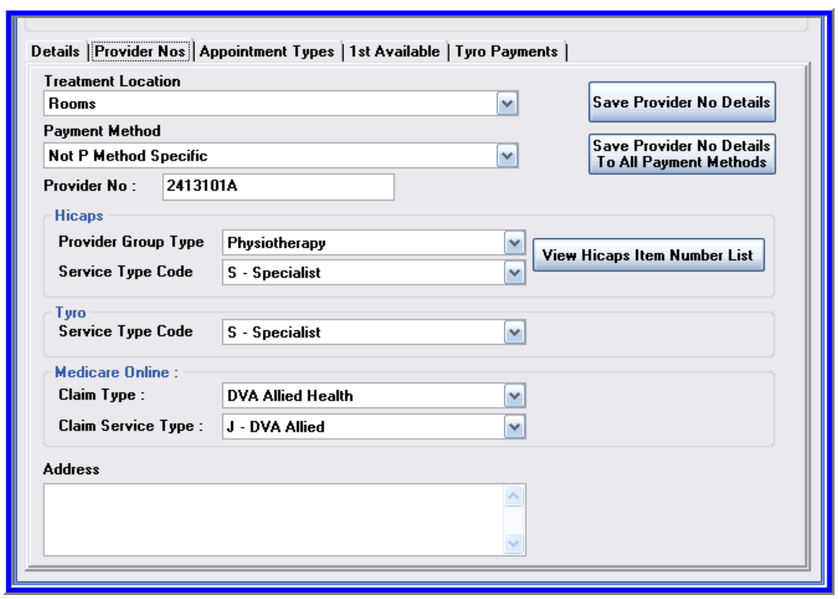
- The above window appears
- Click on Go to the Staff Setup window

- Click Add New

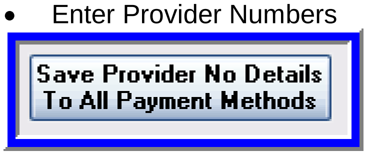


- Enter their FULL NAME & and the name you want to show on the diary

- Click Save (save the changes)
- Click Yes

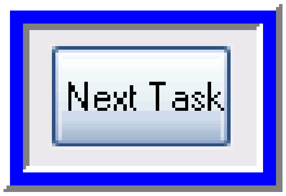


- Click Provider Nos Tab
- Enter Provider Numbers

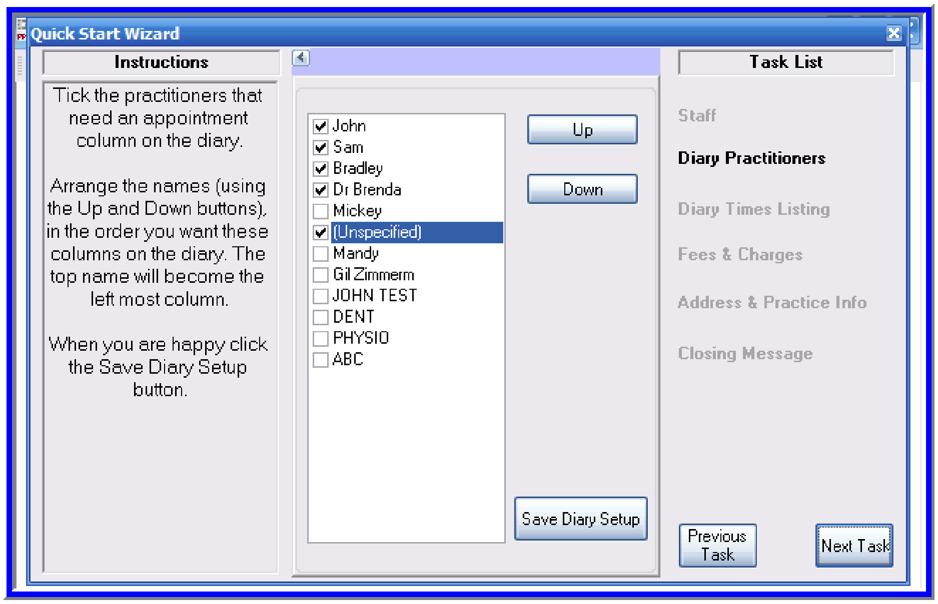


- Click Save Provider No Details to All Payment Methods

- Click exit

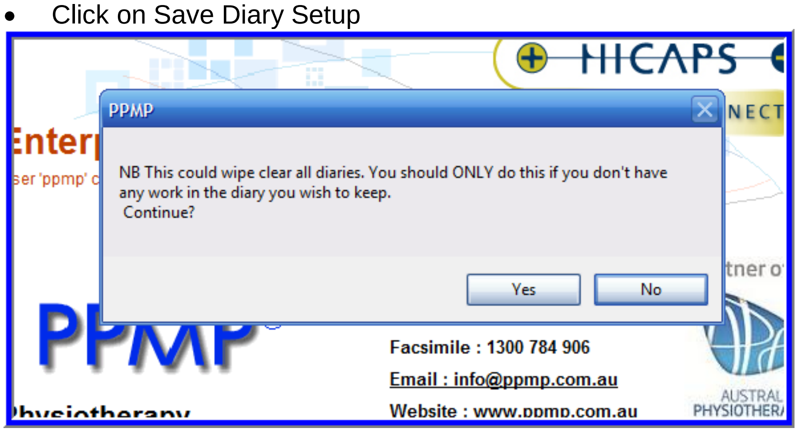


- Click on Next Task

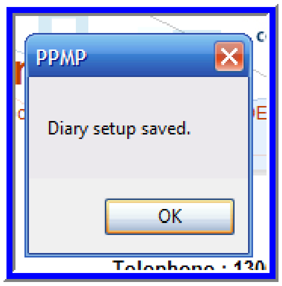


- Select the Practitioners you want displayed on the diary
- Using the Up/Down buttons put them in the order you want them to appear on the diary.
- When you have the columns in the order you want

- Click on Save Diary Setup

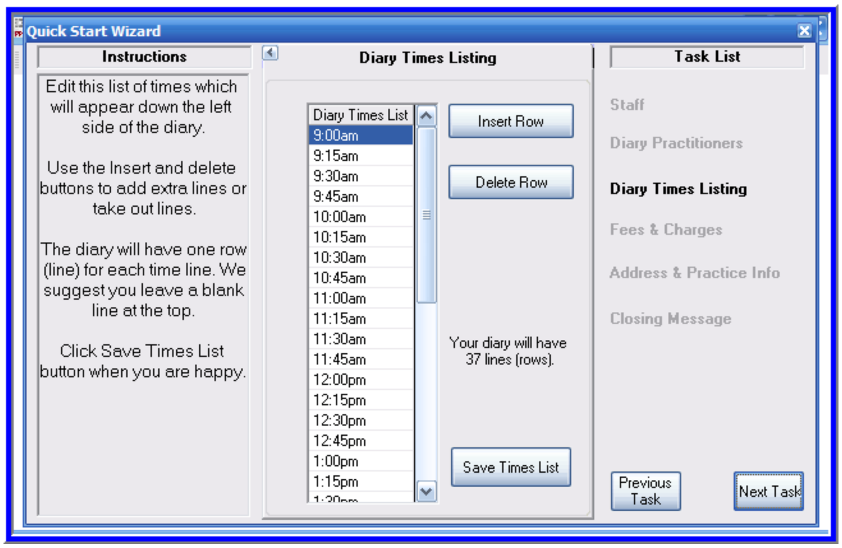


- Click Yes

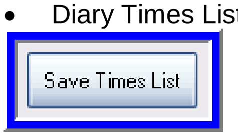


- Click OK

- Click Next Task.



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

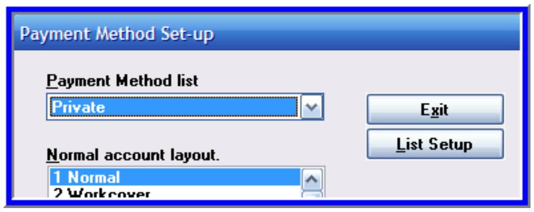


- Click Save Times List.

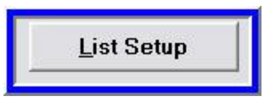
- Click OK

- Click Next Task

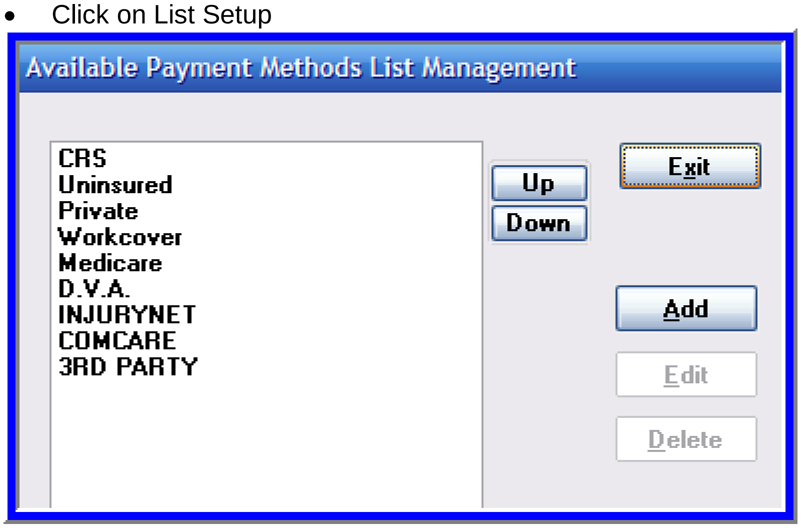
- Click Go to the Fees & Charges Setup Window



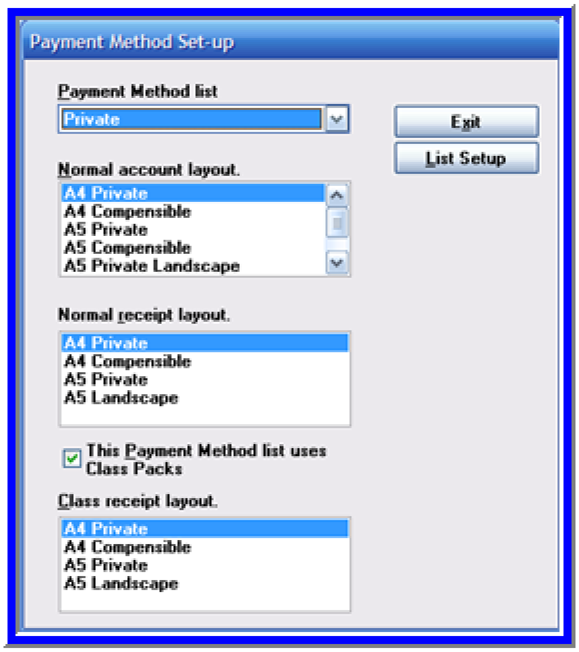
- Click on the set up button for Payment Methods



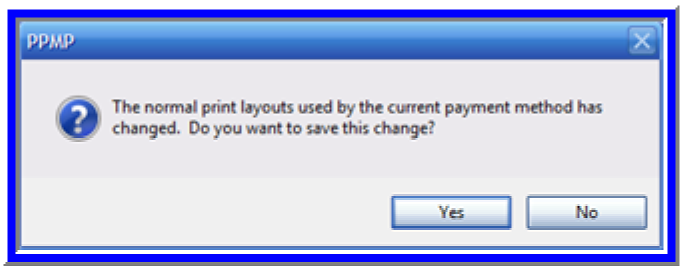
- Click on List Setup



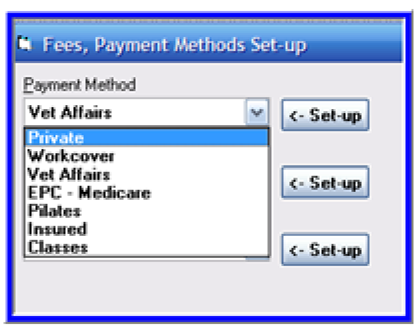
- Add or delete Payment Methods
- Click Add and make your own payment methods list (e.g. Private, Workcover)
- Move these into your order of preference by clicking on a Payment Method and using the up down buttons to move it up or down the list
- Click Exit



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

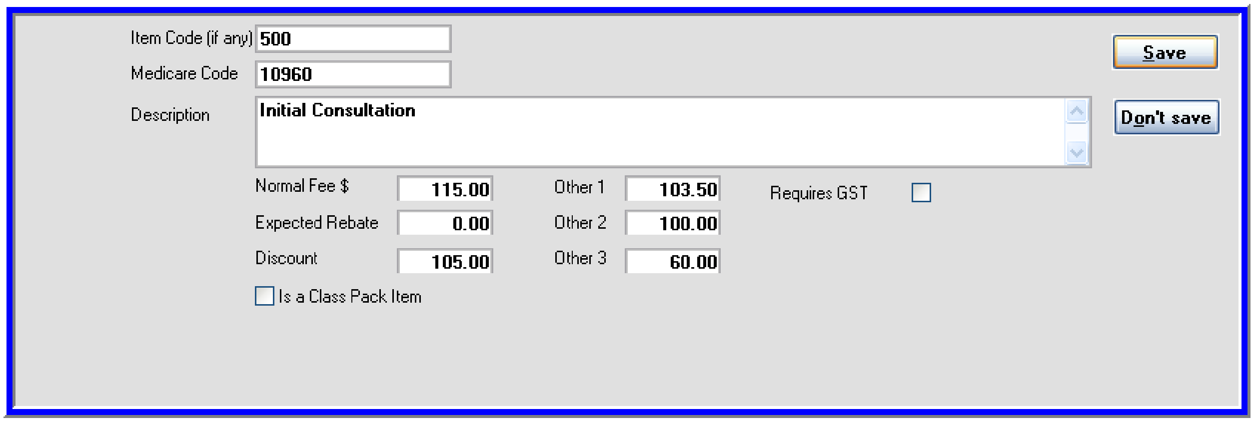


- Save the changes.
- You are now ready to insert your Fees and description and build your list of charges.



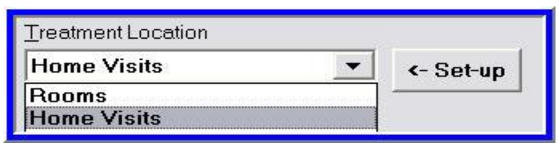
- Select the Payment Method

- Click Add New

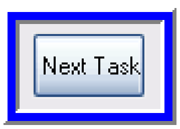


- Type in Item Code, Description and Fee

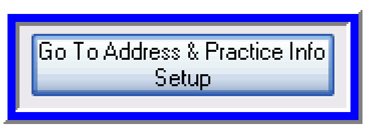
- Click Save
- Continue this process until all your fees and charges have been entered



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

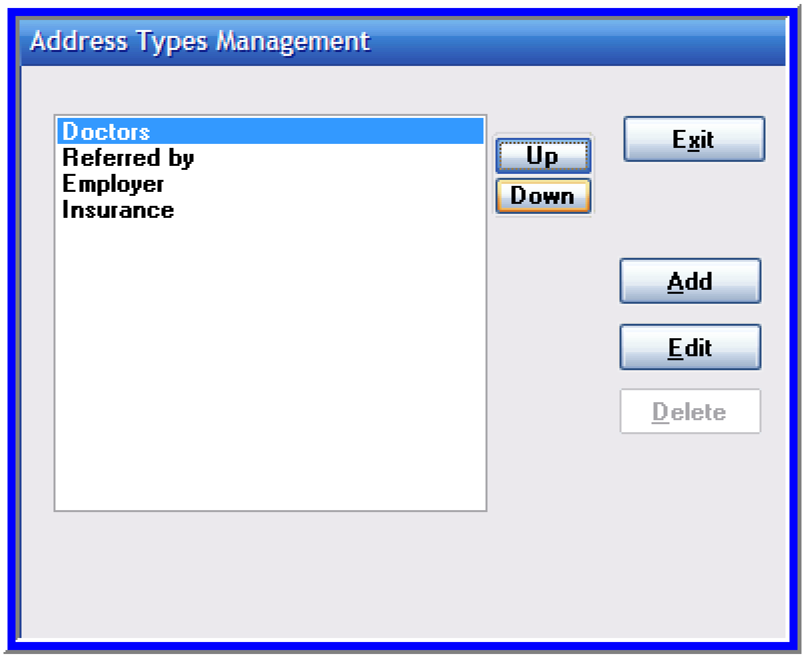


- Click Next Task

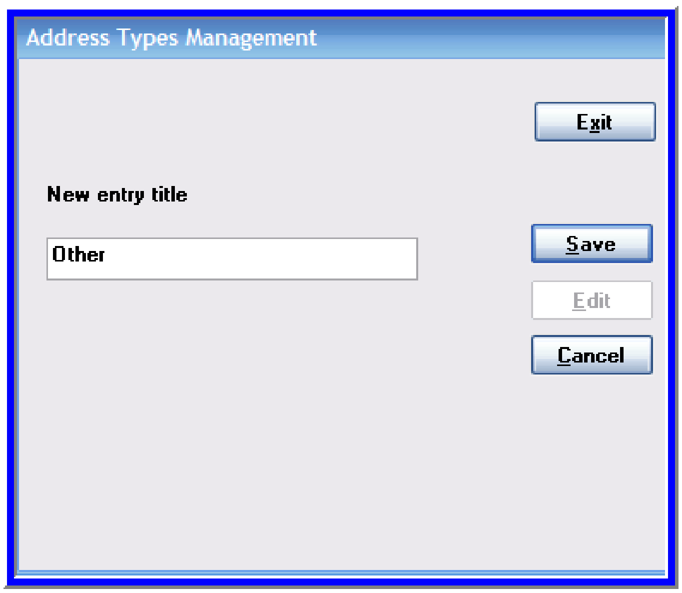


- Click Go To Address & Practice Info Setup

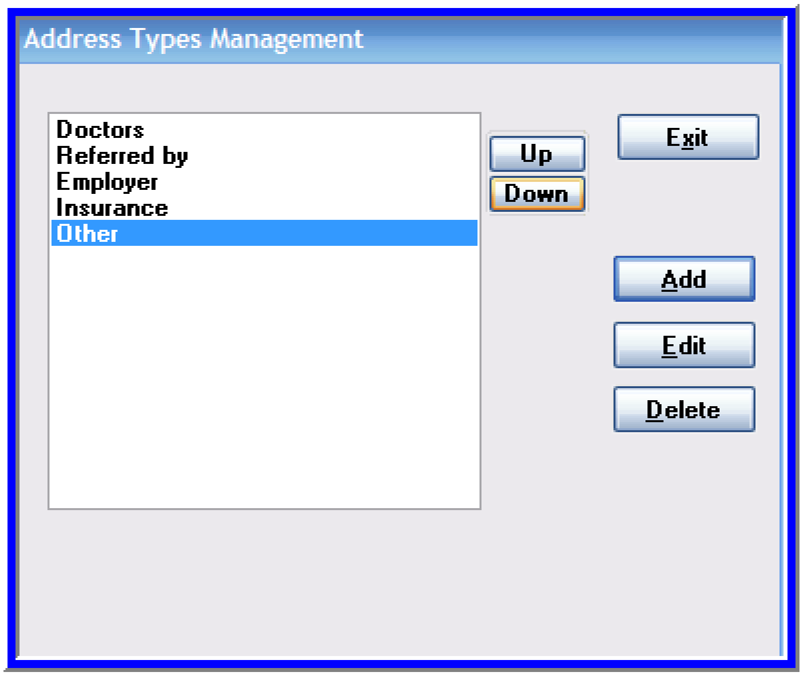
- Click Setup Address Types List to set up your contact details for referrals, work places, insurance companies etc.



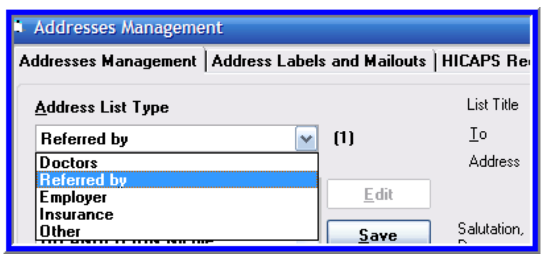
- Click Add and Enter different List Headings



- Click save



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

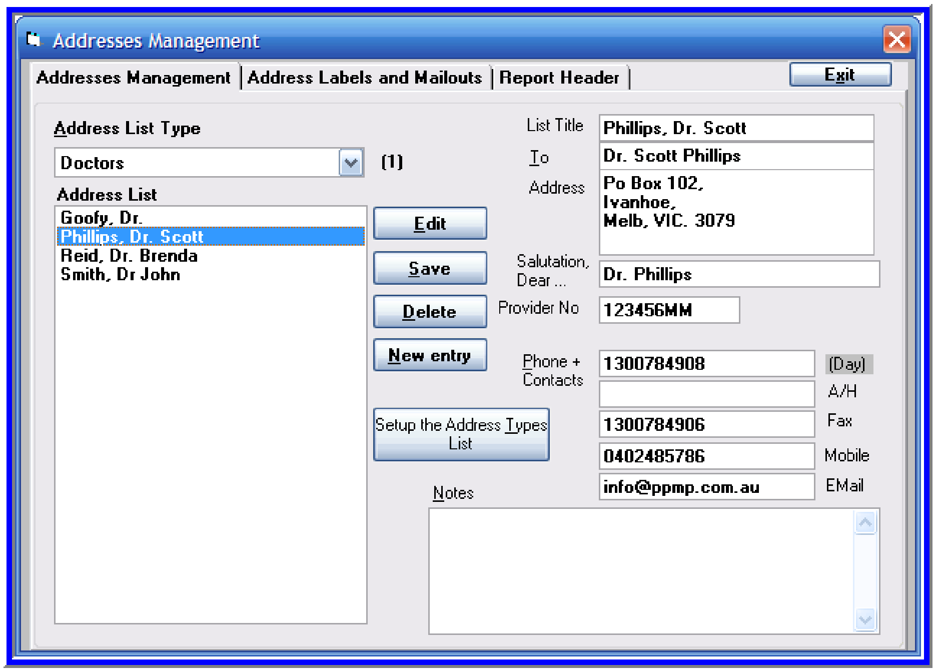


- Select List

- Click New Entry

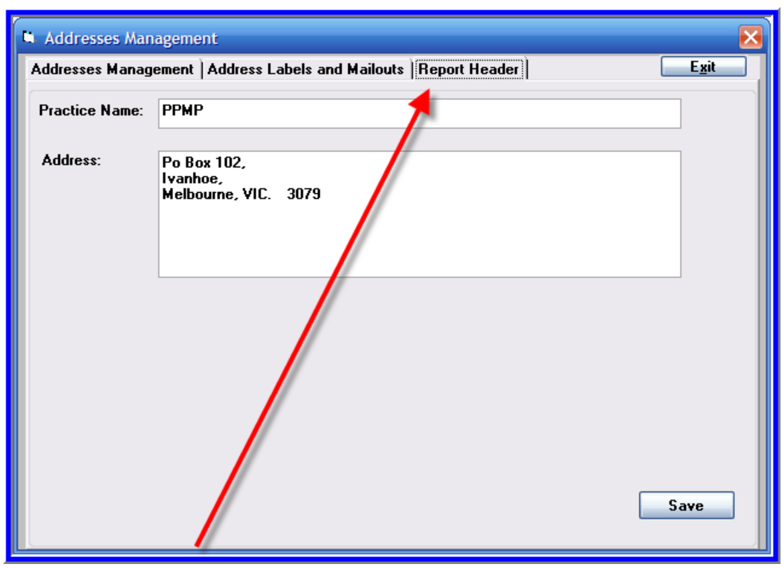
- In the “To” line – enter the name as it would appear on a letter or envelope

- 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.

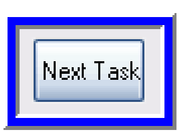


- Click Save

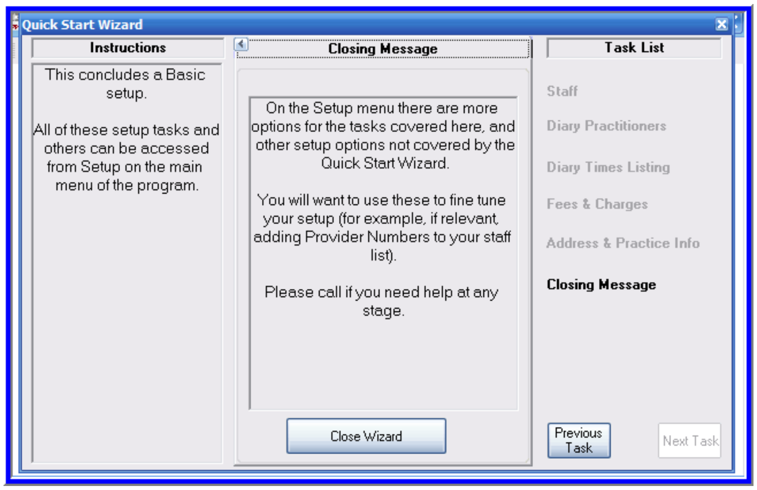
- Continue this way to build your address lists



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



- Click Next Task

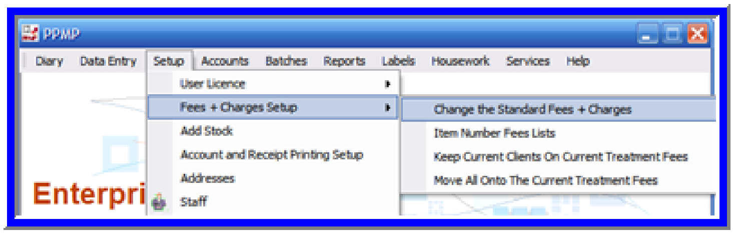


- This concludes the Basic Setup
- Close Wizard

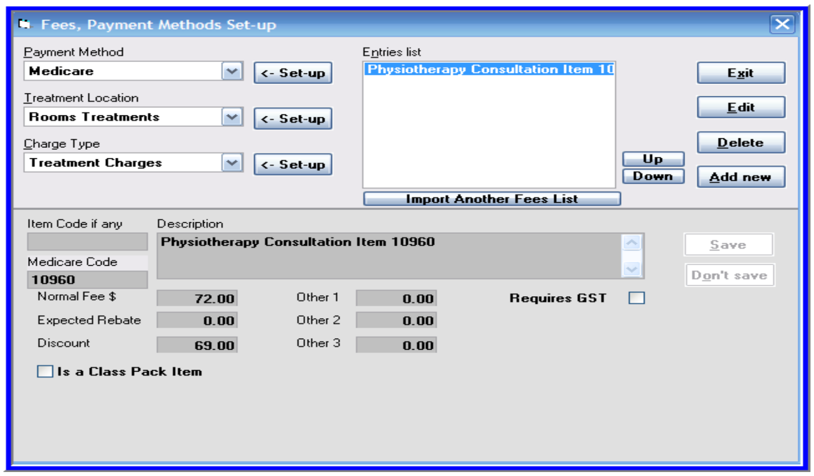
Section 2 –Additional services

1 DVA Procedure

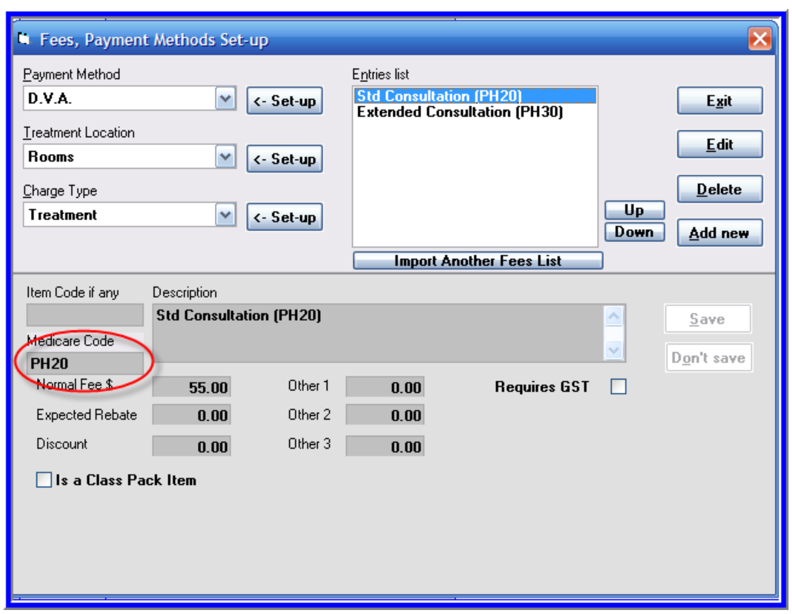
Before we start…



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

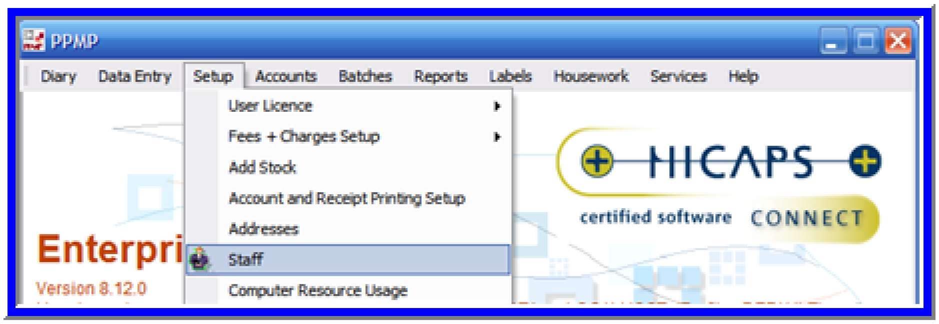


- Under Payment Method select DVA / Medicare
  (If you don't have them already – Add New Payment Methods called Medicare & DVA or Veteran Affairs)

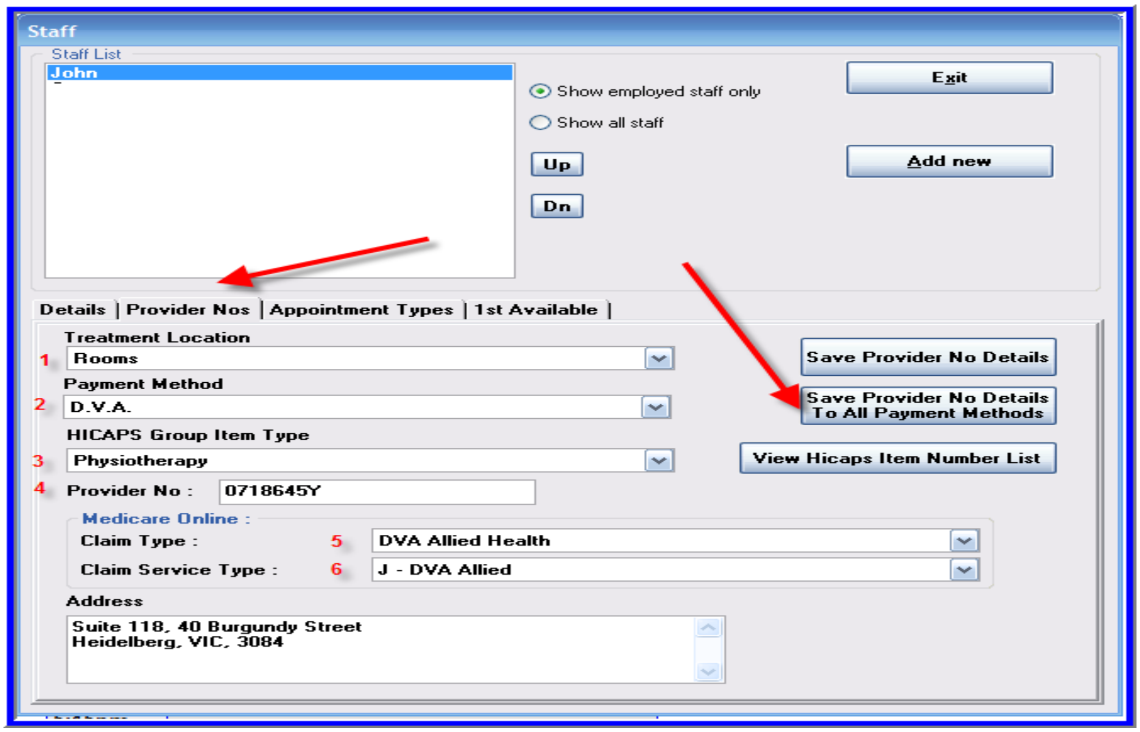


- Make sure ALL Medicare & DVA Payment Methods have the correct information entered (including Item Numbers)
- Click Exit

1.1 Setting up staff



- Go to Setup
- Staff

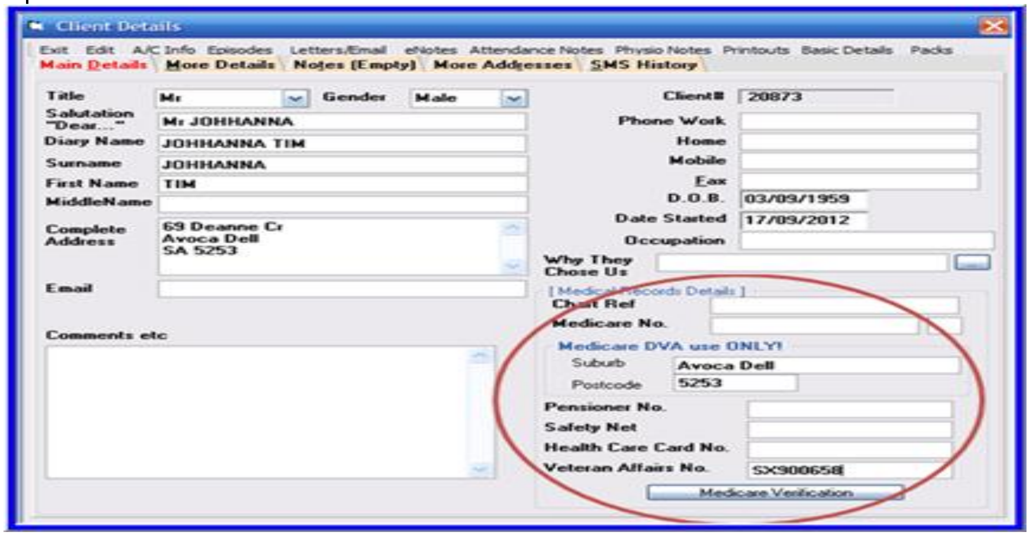


- Select the staff member from the list
- Click Provider No’s TAB
- Select the Treatment Location – 1
  (These steps must be repeated for each Treatment Location)
- Payment Method - 2
- Select Hicaps Group (Physiotherapy) - 3
- Enter the Provider Number - 4
- Under MedicareOnline – Claim Type - select 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

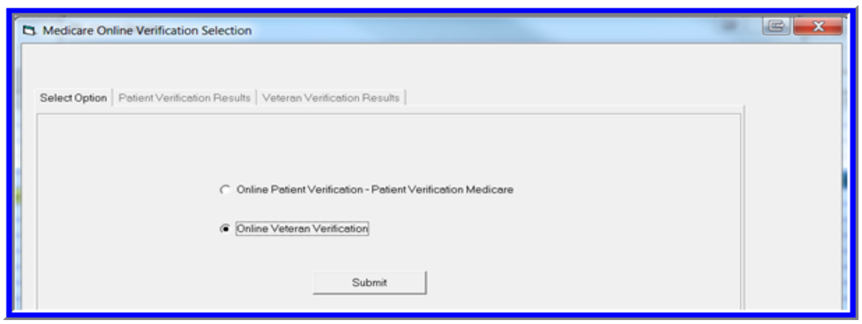
Repeat for each Staff Member & each Treatment Location

1.2 Setting up DVA clients and verification

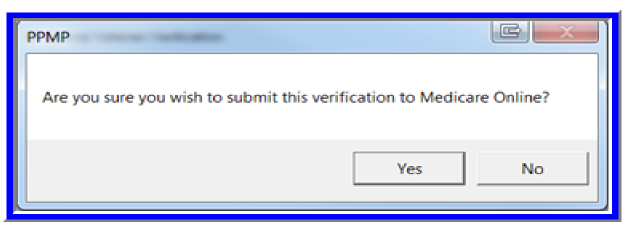
Open client file



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

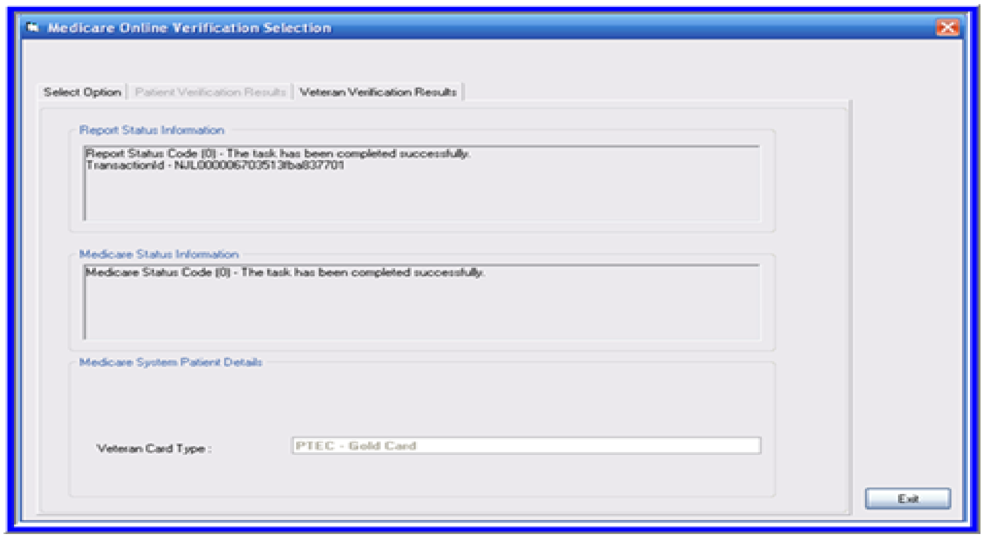


- Select Online Veteran Verification
- Click Submit



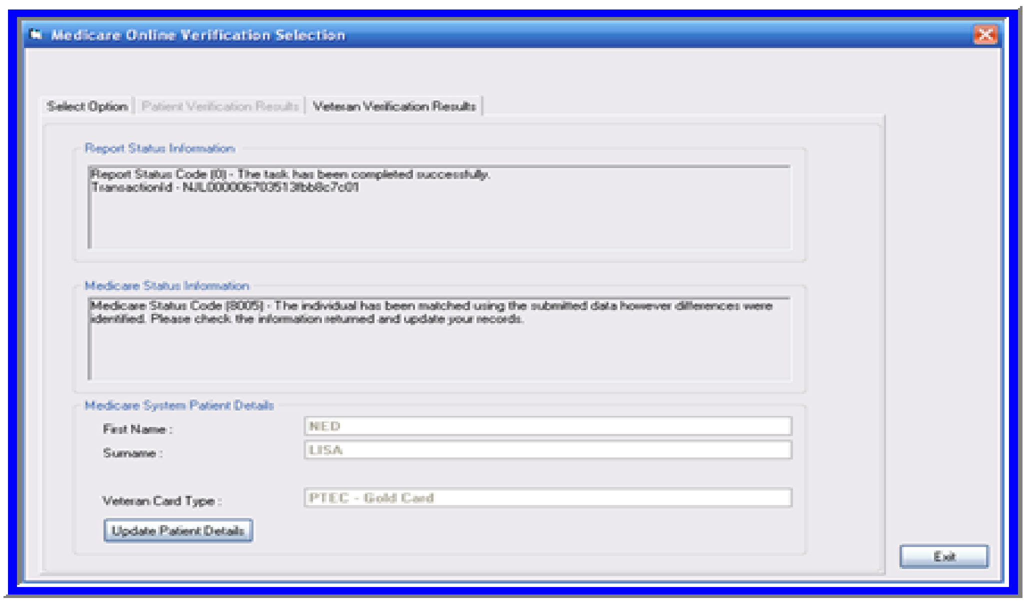
- Click Yes

- Your request is being processed…please wait

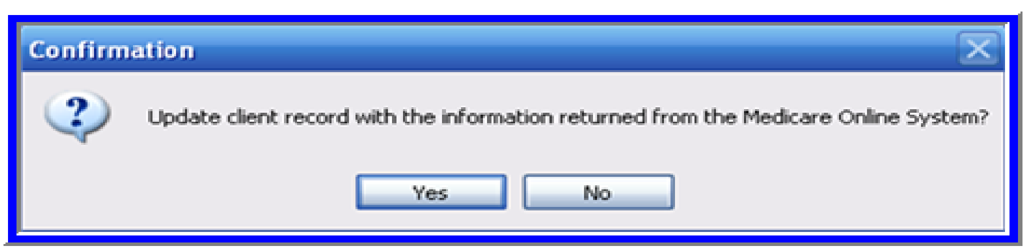


- Check the Results (The task has been completed successfully)
- Click Exit

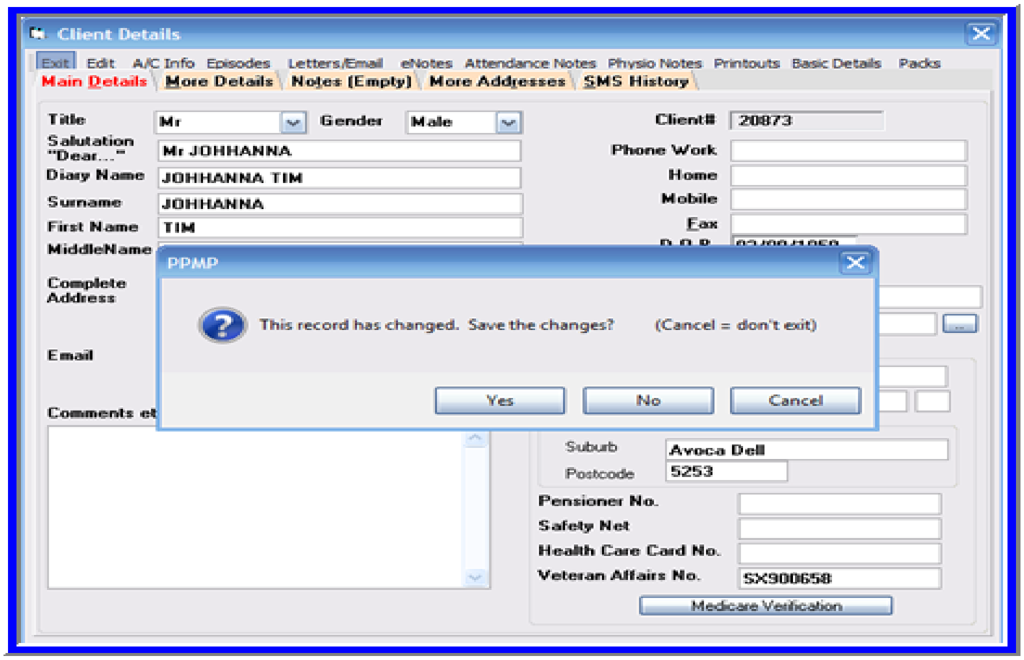
If there are differences between the data you submit and what Medicare have on file you will get the below screen



- Click Update Patient Details

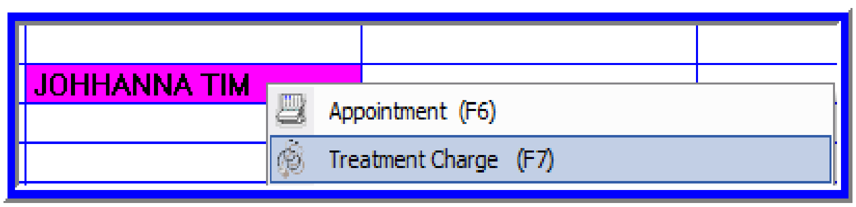


- Click Yes

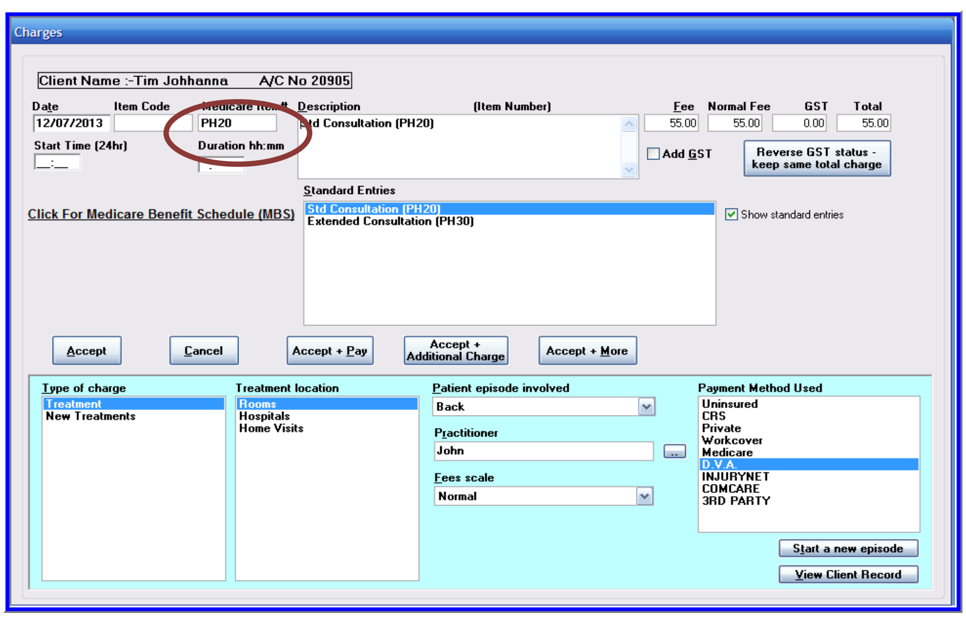


- Close Client Details screen and save changes

1.3 Treatment charging, recording and transmitting the voucher

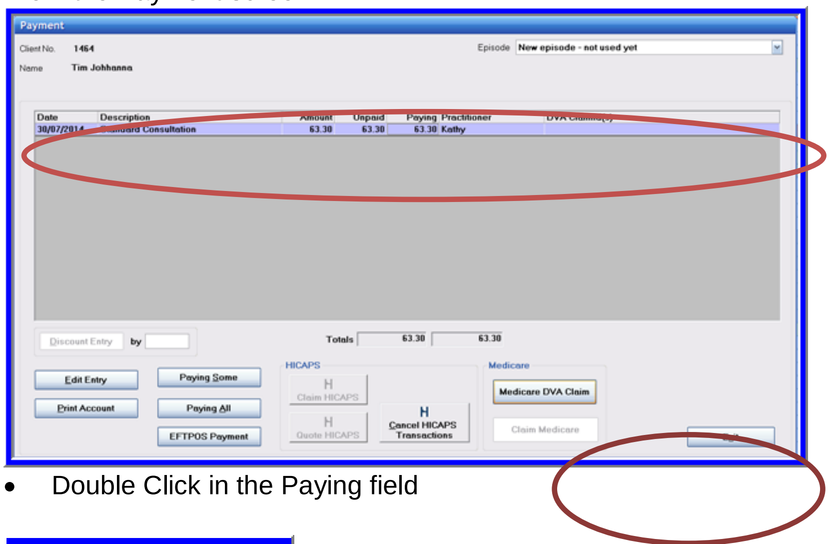


- Right click on Client Name on Diary
- Select Treatment Charge



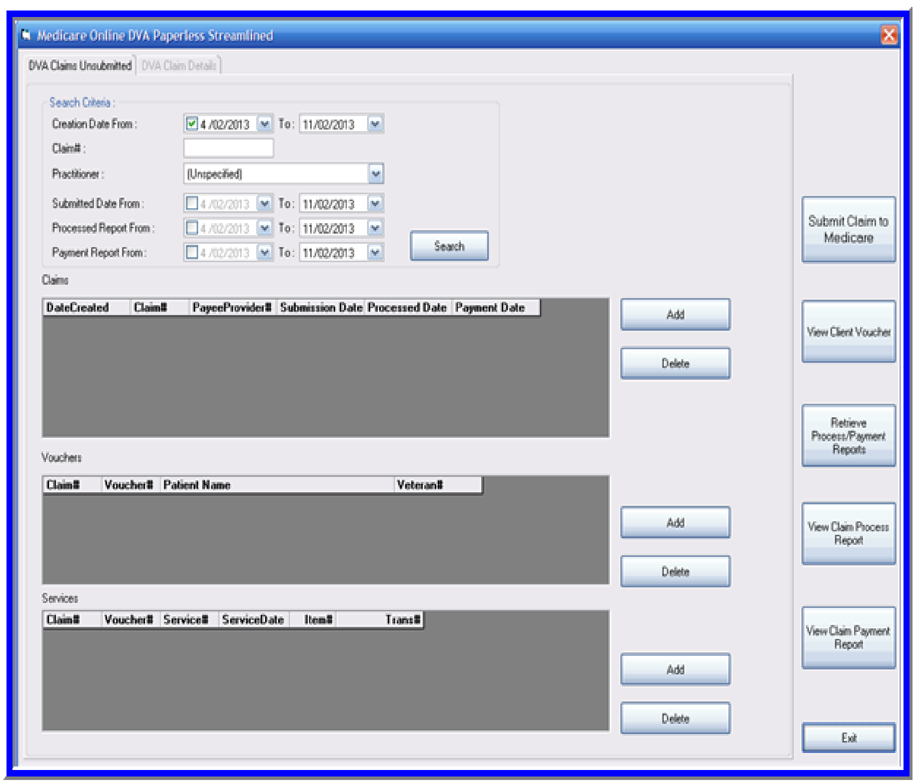
- Make sure there is an Item Number under Medicare Item #
- Treatment Charge as normal
- Click Accept and Pay

From the Payment screen



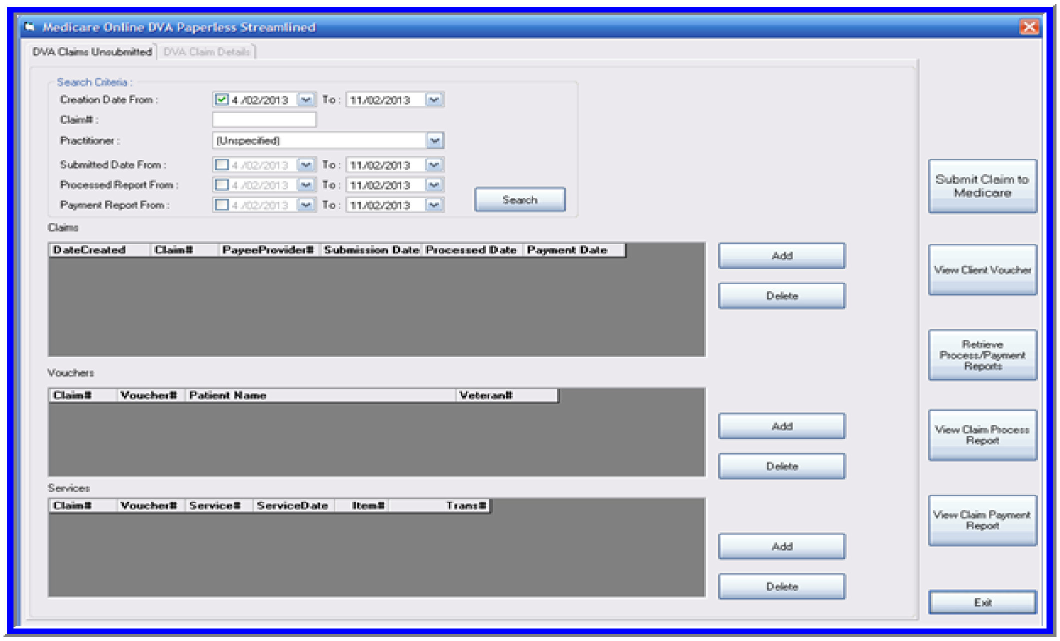
- Double Click in the Paying field

- Click on Medicare DVA Claim

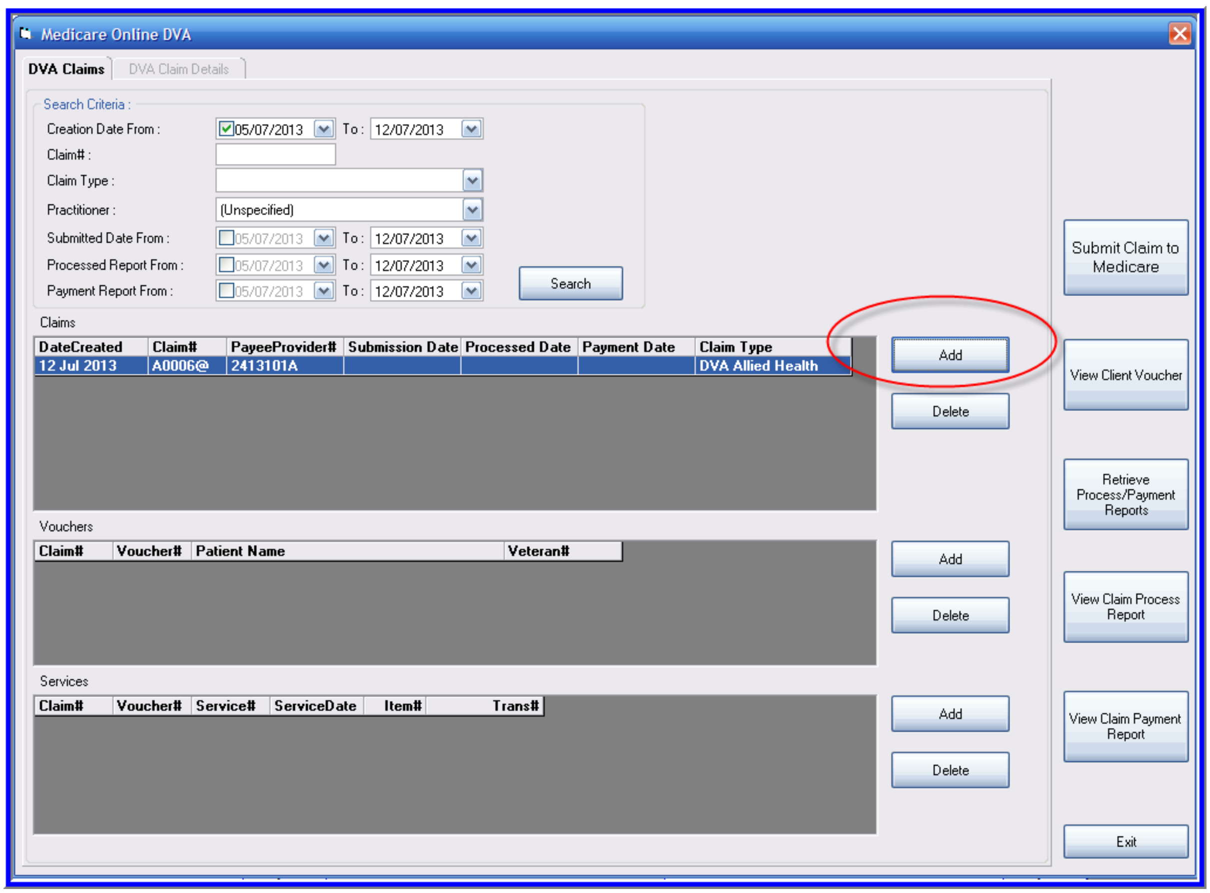


The above screen is the Main screen. This screen allows you to:

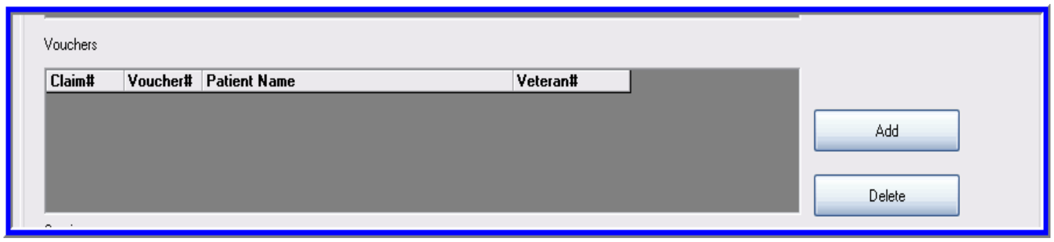
- Search (existing Claims)
- **Create Claims**
- Delete Claims
- View/Print Reports



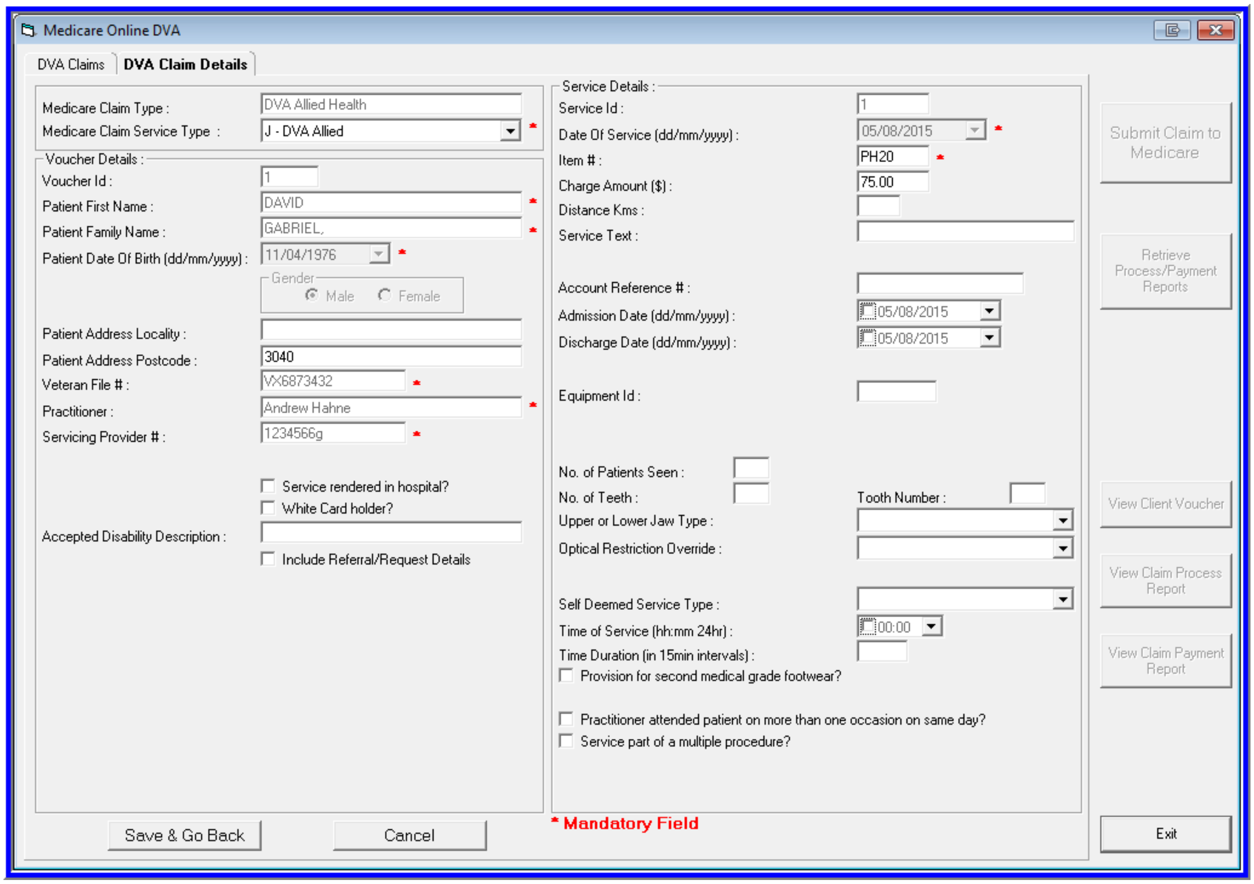
- Under Claims, Click Add



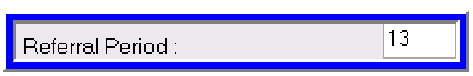
- A New Claim will be added



- Under Vouchers, Click Add

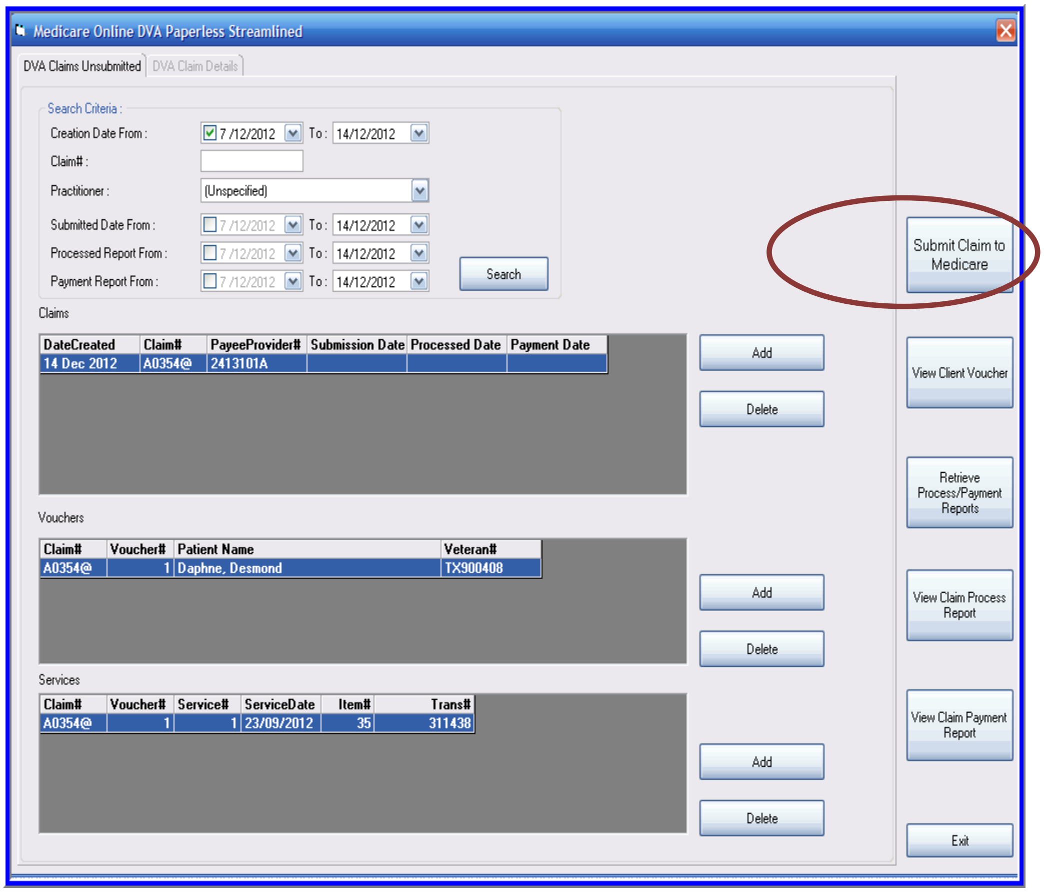


- All sections marked with * MUST be entered

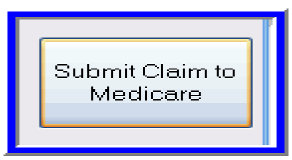


- If the above 2 fields are filled in – DELETE contents (unless the client is a WHITE CARD HOLDER)

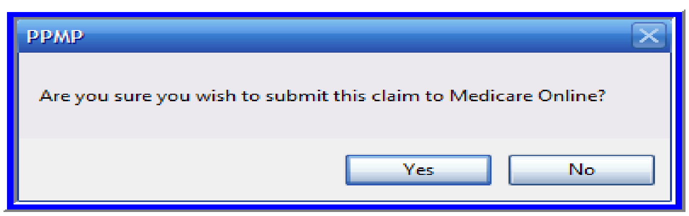
- Click Save & Go Back



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



- Click Submit to Medicare

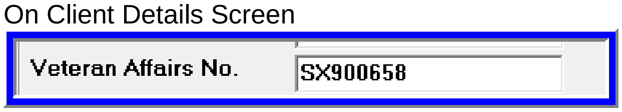


- Click Yes – you will receive notification that it has been sent.

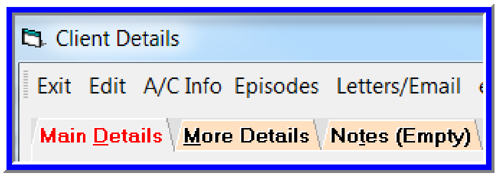
NB: Please note PPMP allows you to create a claim with multiple vouchers and multiple services within each voucher. However we HIGHLY RECOMMEND one voucher per claim for auditing and maintenance purposes.

1.4 Record white card holders

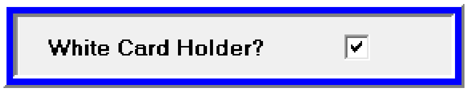
On Client Details Screen



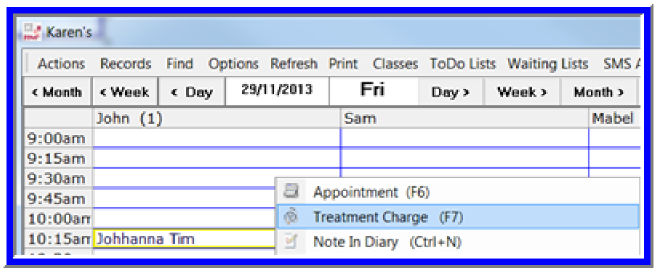
- Insert Veteran Affairs No



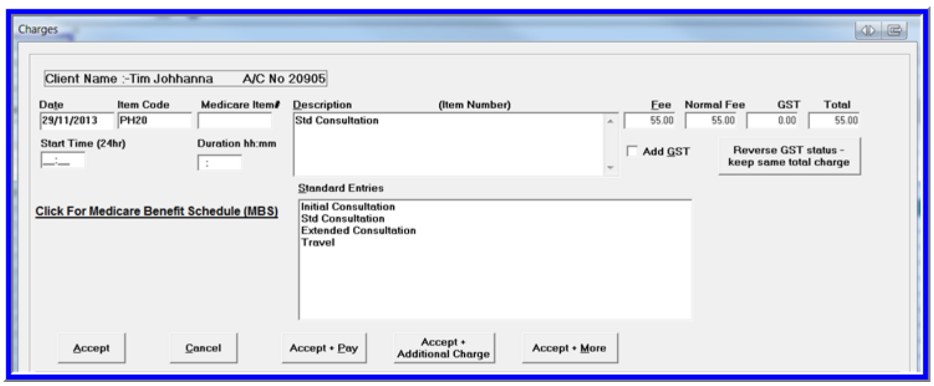
- Click More details



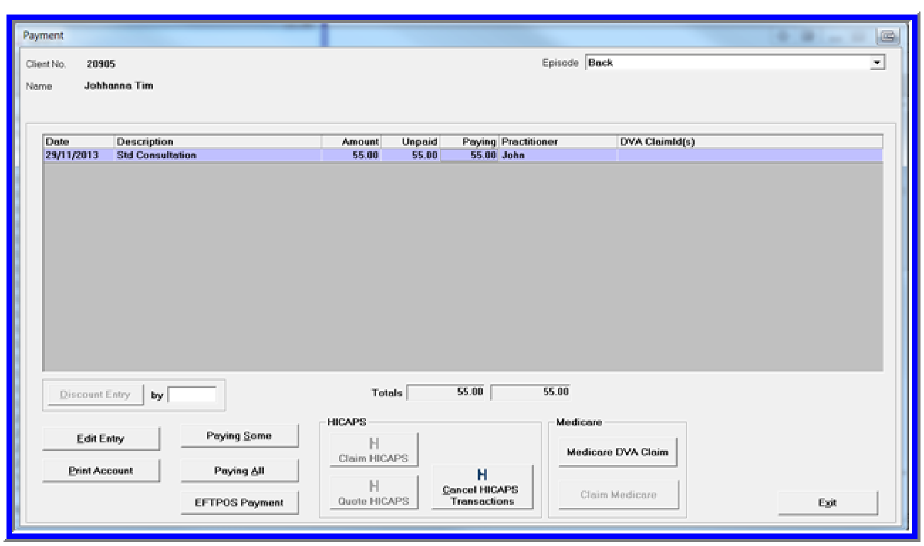
- Tick White Card Holder
- Exit & Save Changes



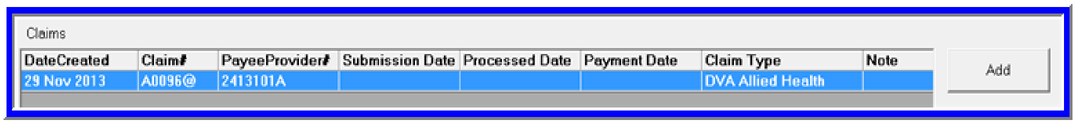
- Treatment Charge the client



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

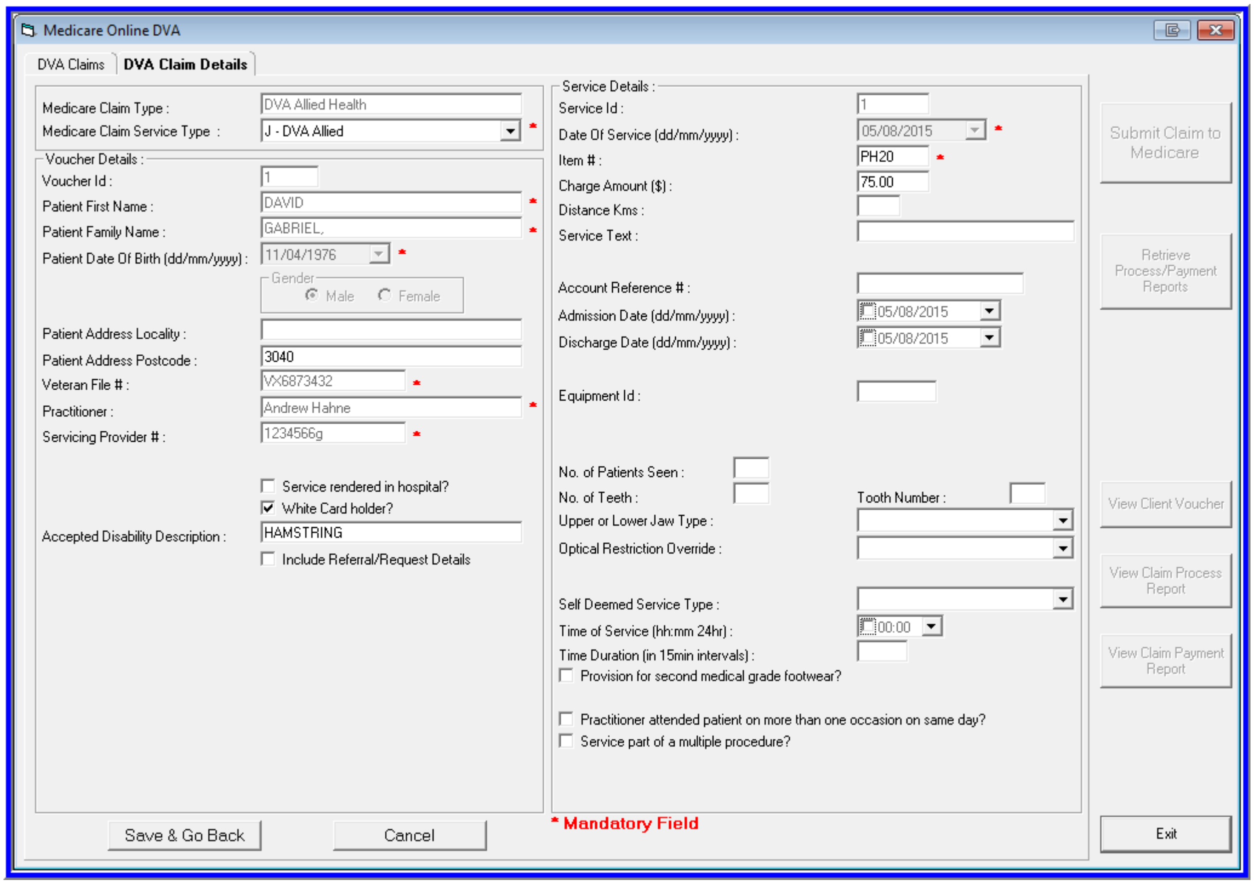


- Double Click in Paying Field
- Click Medicare DVA Claim

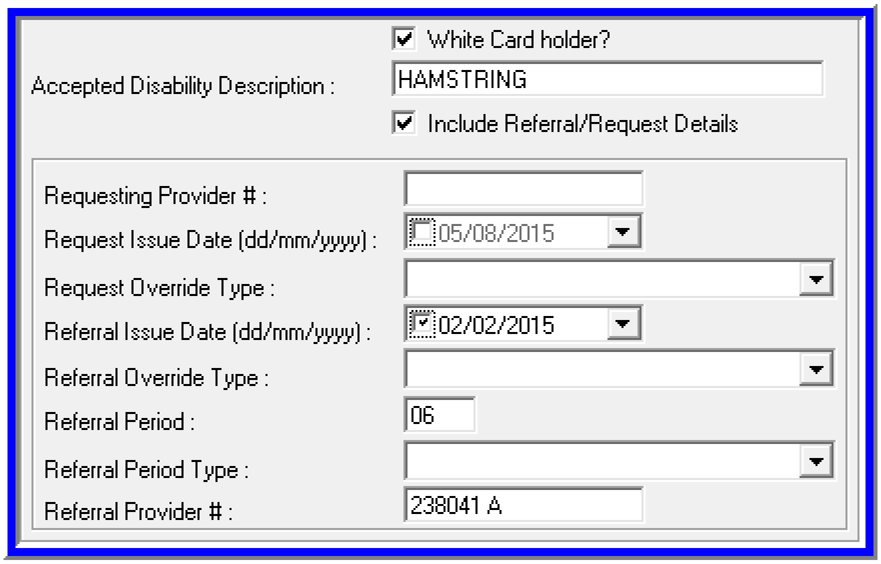


- Under Claims – Click Add

- Under Vouchers – Click Add



- 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

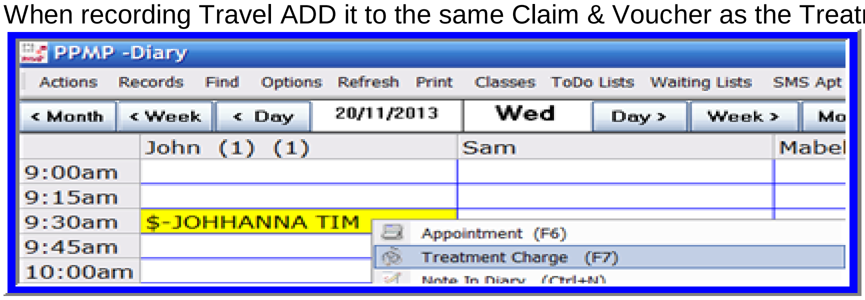


- **Tick** Referral Issue Date
- Referral Period should be inserted
- Referral Provider Number should be inserted
- Make sure ALL * Fields are filled in
- Click Save & Go Back

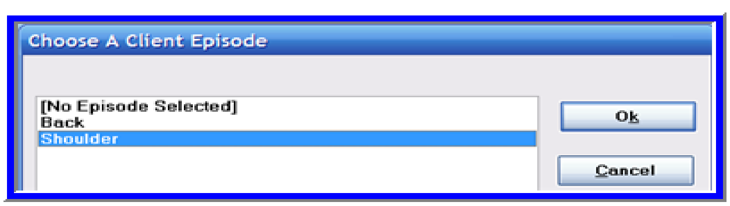
- Click Submit to Medicare

1.5 How to record travel - Km's

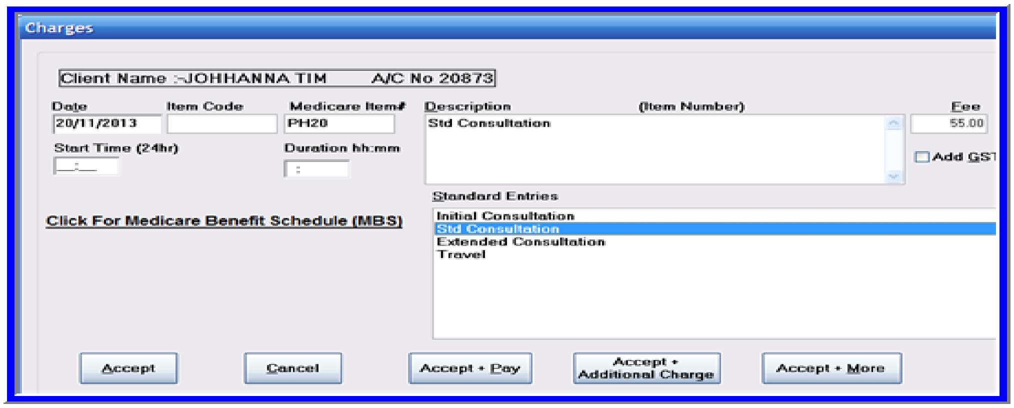
NB: DVA do not pay the first 10km's.
When recording Travel ADD it to the same Claim & Voucher as the Treatment



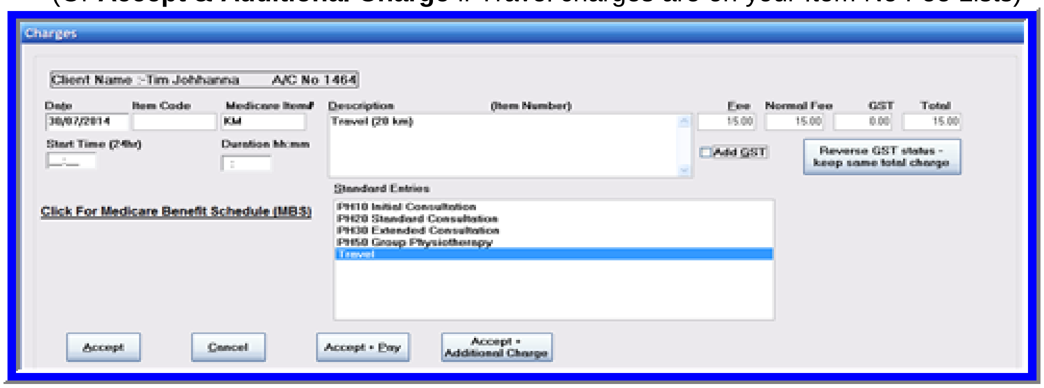
- Right Click
- Treatment Charge



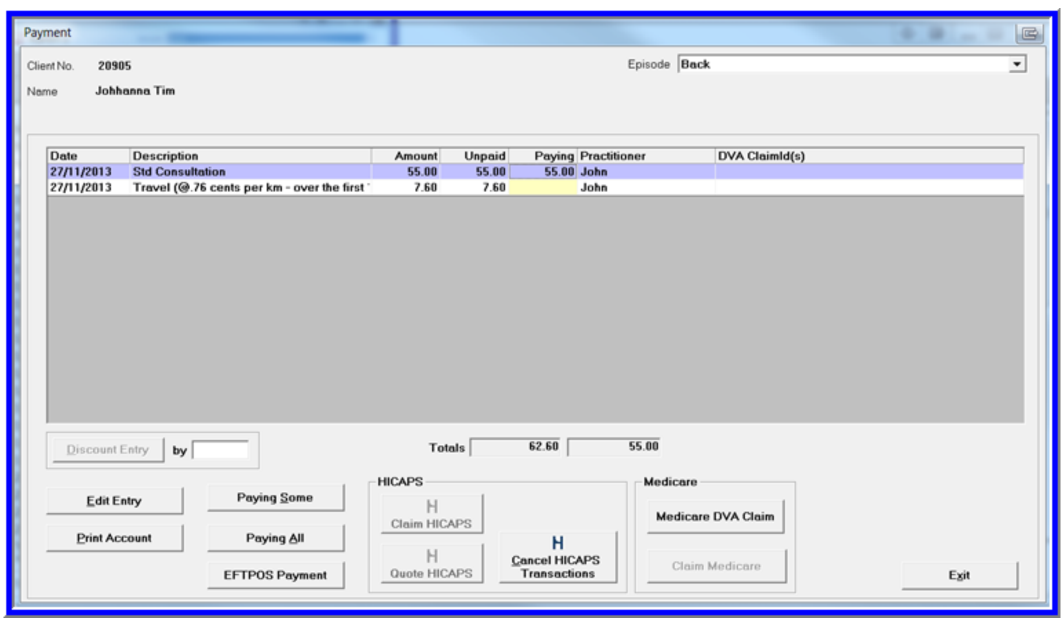
- Select Episode (if requested)



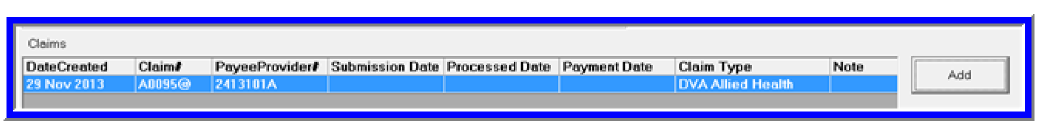
- Click Accept & More
  (Or **Accept & Additional Charge** if Travel charges are on your Item No Fee Lists)



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

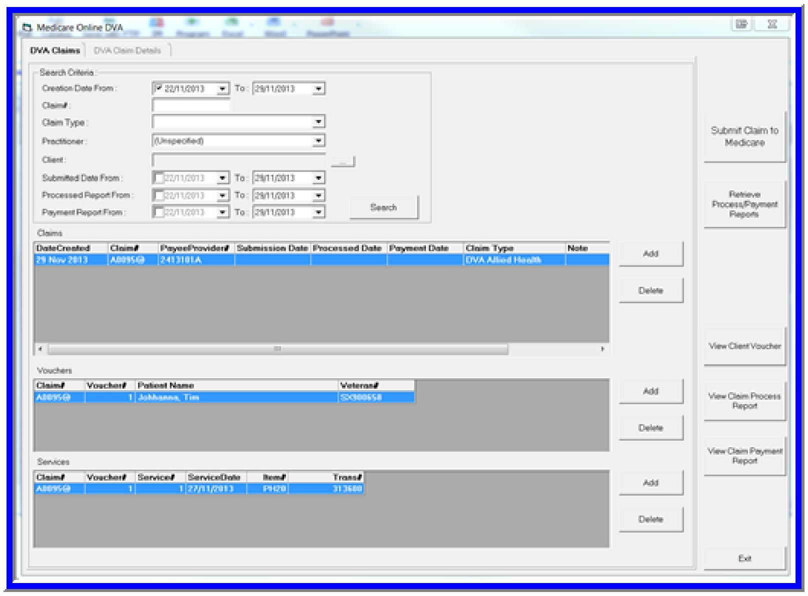


- Double Click in the Paying Column to record the payment for the Treatment
- Click Medicare DVA Claim

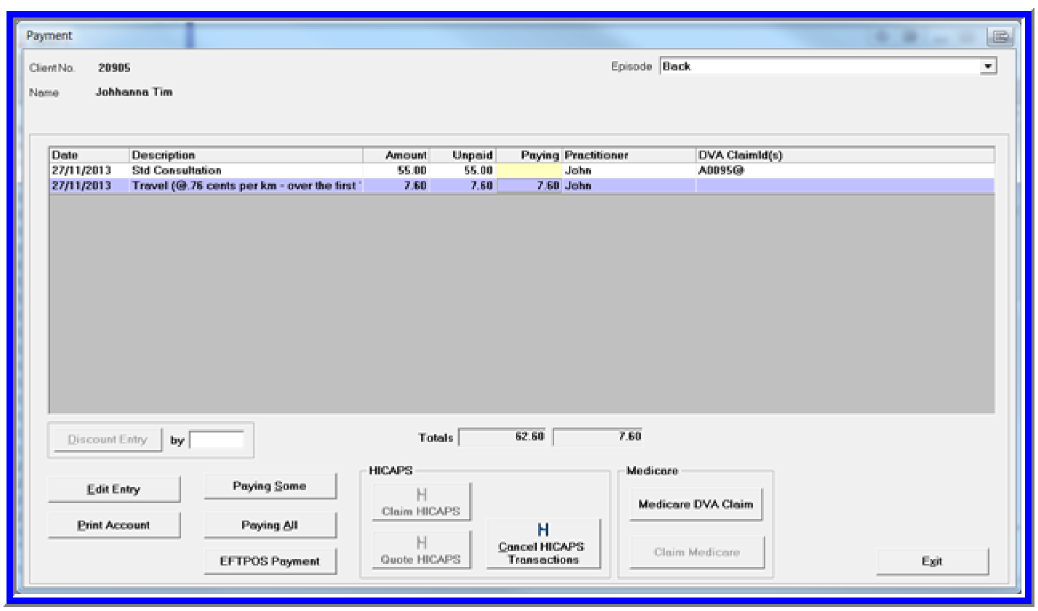


- Click Add (to add the claim)

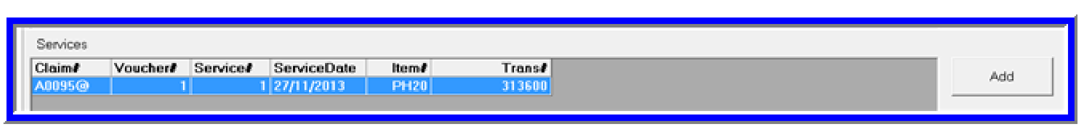
- Click Add (to add the voucher)
- Make sure all * fields are filled in (don't forget to delete Referral Period & Referral Provider #)
- Click Save & Go Back



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

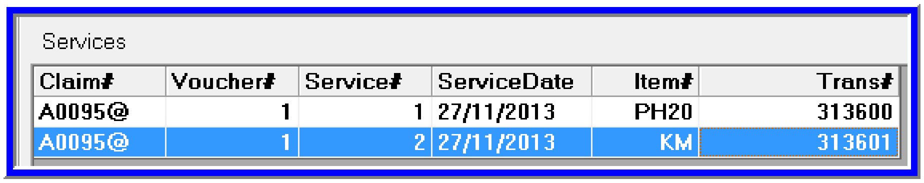


- Back on the Payment screen
- Double Click in the Paying Field next to Travel charge
- Click Medicare DVA Claim



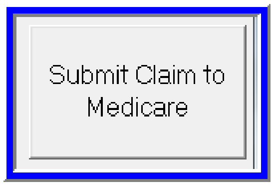
- Select the same Claim/Voucher
- Under the Services Claim - Click Add

- 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

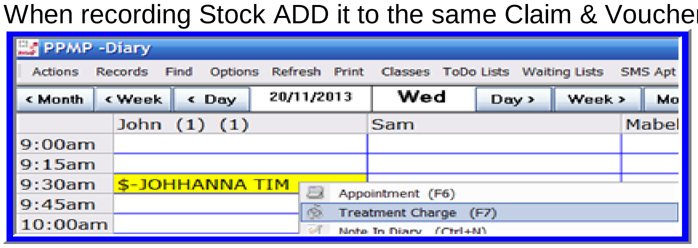


- Click Submit to Medicare

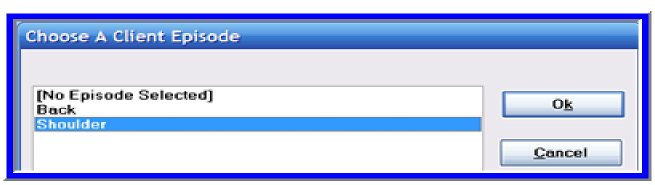
1.6 How to record stock

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

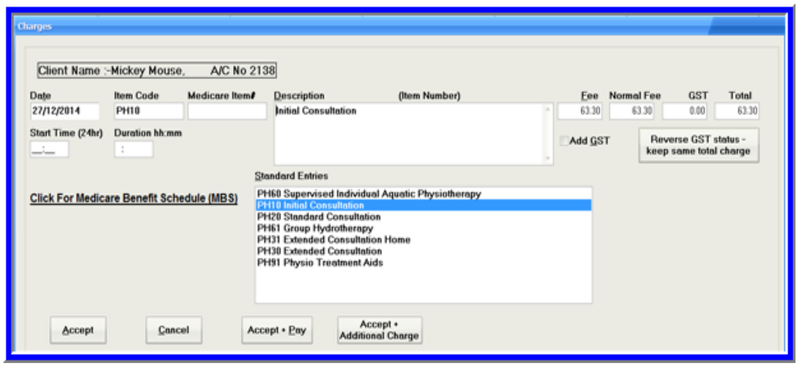
When recording Stock ADD it to the same Claim & Voucher as the Treatment



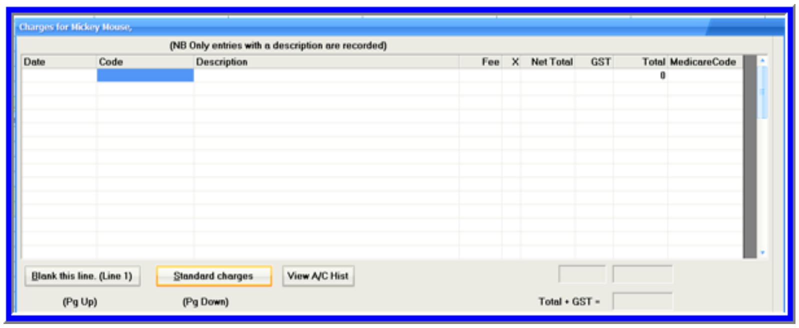
- Right Click
- Treatment Charge



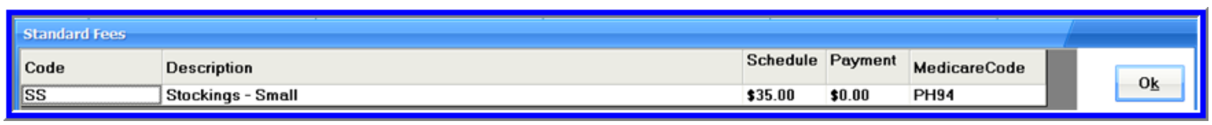
- Select Episode (if requested)



- Click Accept & Additional Charge

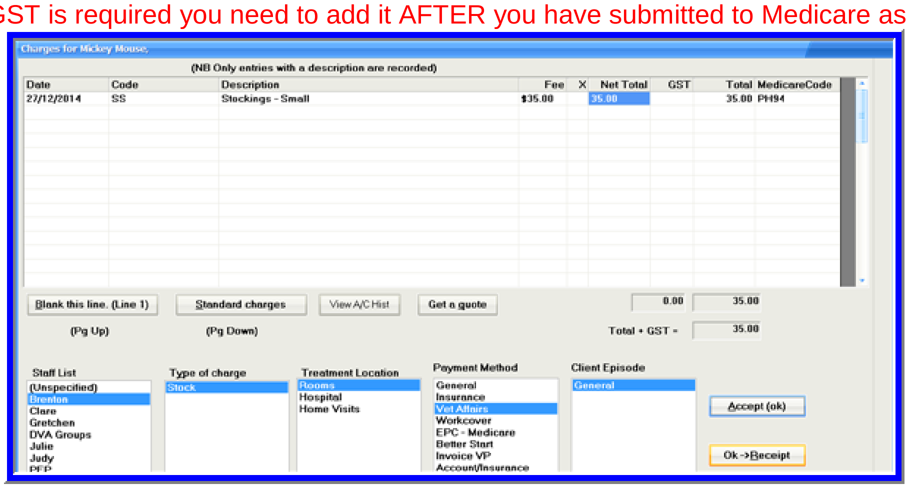


- Click Standard Charges



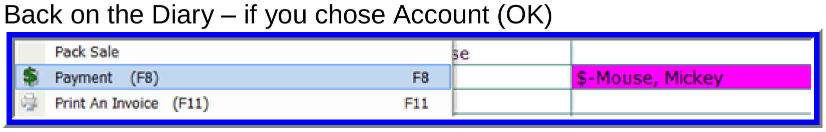
- Select Item from list
- Click OK

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)



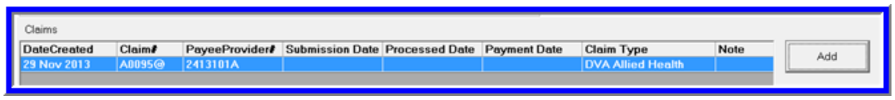
- Click Accept (OK)
- OR OK (receipt) to go straight to payment screen

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

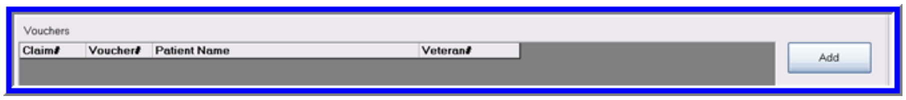


- Go to Actions

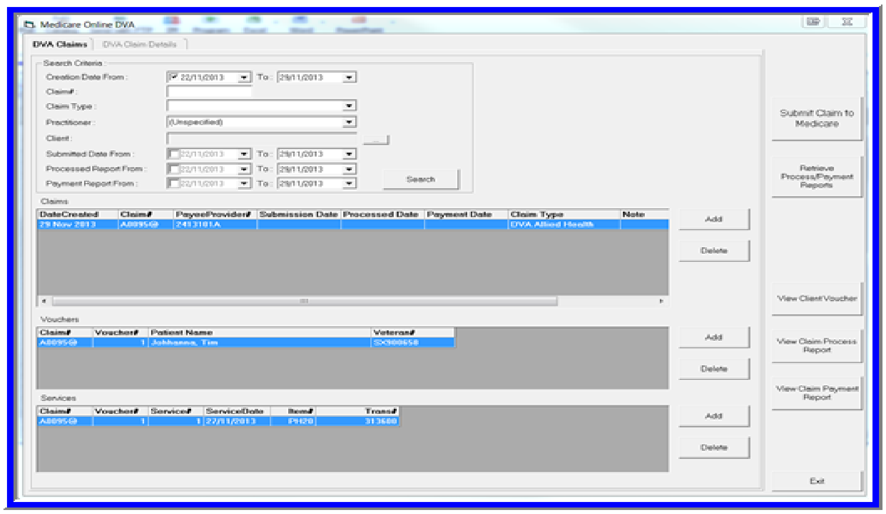
- Payment



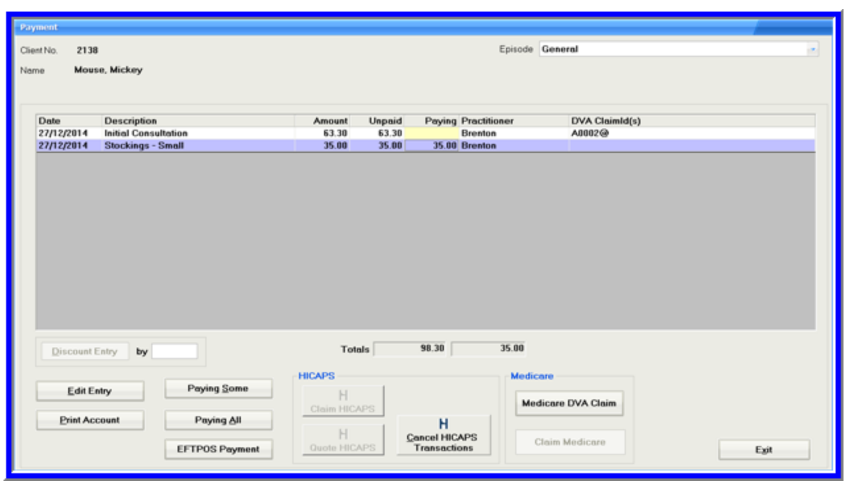
- Click Add (to add the claim)



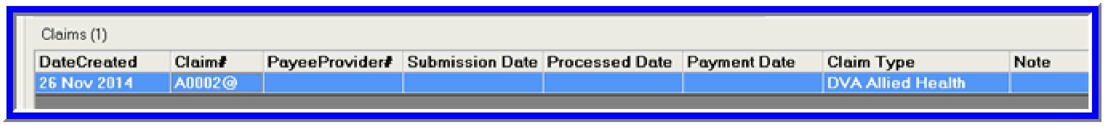
- Click Add (to add the voucher)
- Make sure all * fields are filled in (don't forget to delete Referral Period & Referral Provider number – unless they are White Card Holder)
- Click Save & Go Back



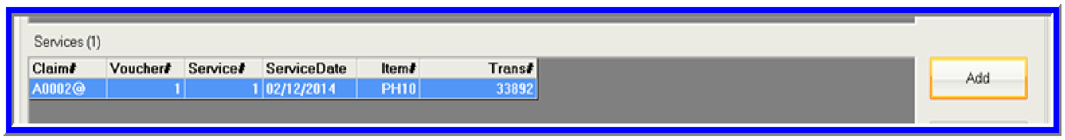
- **DO NOT** SUBMIT TO MEDICARE
- Click Exit



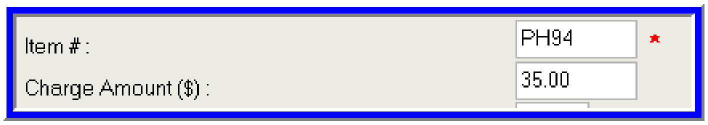
- Back on the Payment screen
- Double Click in the Paying Field next to Additional Charge
- Click Medicare DVA Claim



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

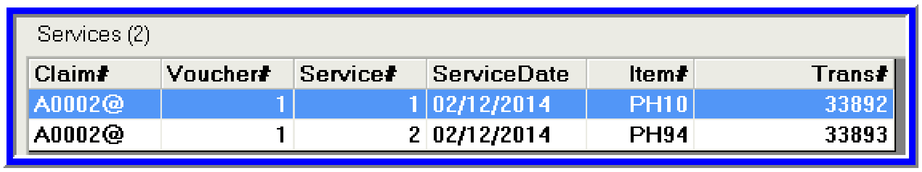


- Under the Services Claim - Click Add

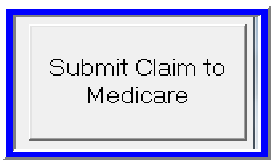


- Make sure Item number is present

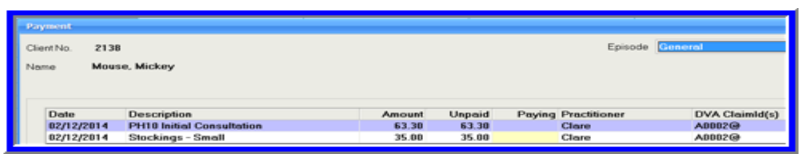
- Click Save & Go Back



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

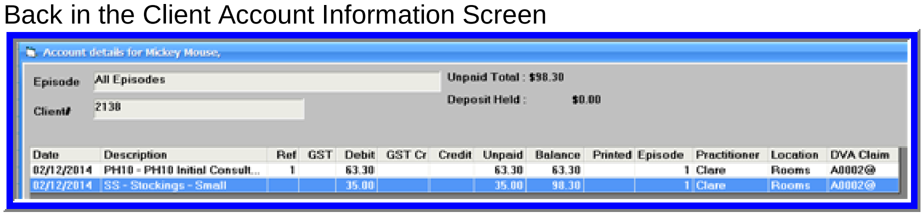


- Click Submit to Medicare

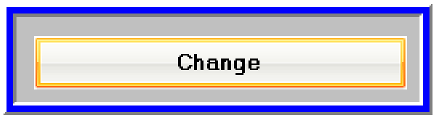


- Back on the Payment screen you will see that the service has been added to the same DVA Claim
- Exit and return back to the Client's Account information screen (if you need to Add GST)

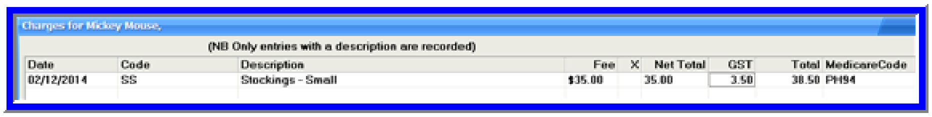
Back in the Client Account Information Screen



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



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



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

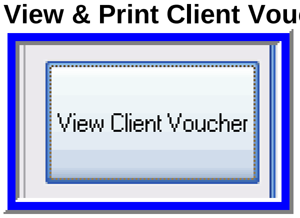
1.7 DVA Reports

Retrieve Process/Payment Reports

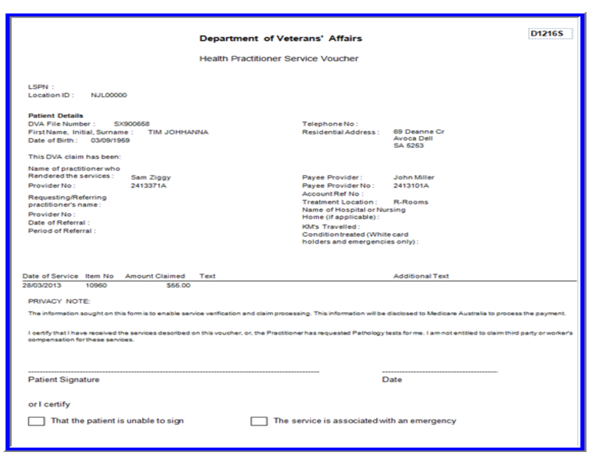
- Click Retrieve Process/Payment Reports

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



D1216S

Department of Veterans' Affairs

Health Practitioner Service Voucher

LSPN :
Location ID : NJL00000

Patient Details
DVA File Number : SX900658
First Name, Initial, Surname : TIM JOHHANNA
Date of Birth : 03/09/1959

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 : 2413371A
Requesting/Referring practitioner's name :
Provider No :
Date of Referral :
Period of Referral :

Payee Provider : John Miller
Payee Provider No : 2413101A
Account Ref No :
Treatment Location : R-Rooms
Name of Hospital or Nursing Home (if applicable) :
KM's Travelled :
Condition treated (White card holders and emergencies only) :

Date of Service	Item No	Amount Claimed	Text	Additional Text
28/03/2013	10960	$55.00		

PRIVACY NOTE:

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

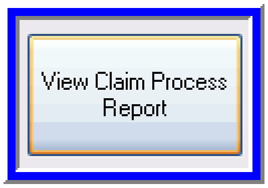
or I certify

☐ That the patient is unable to sign

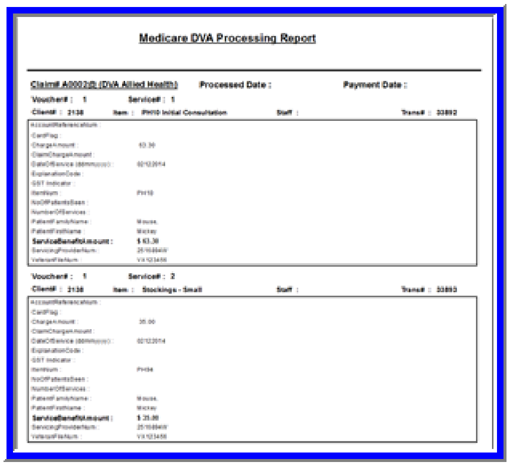
☐ The service is associated with an emergency

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

View Claim Process Report



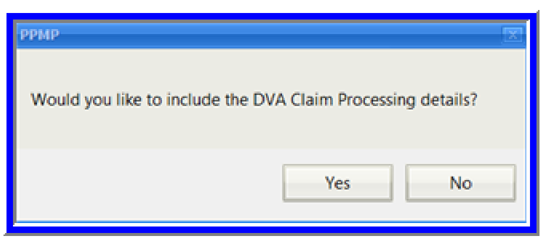
- Click Claim Process Report



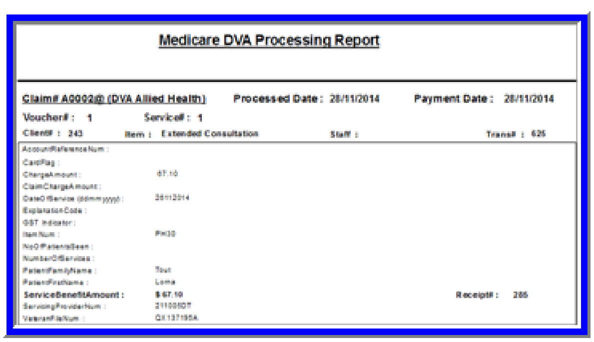
- The report displays details of the selected Claim that have been submitted to Medicare

View Payment Report

- Click on View Claim Payment Report



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

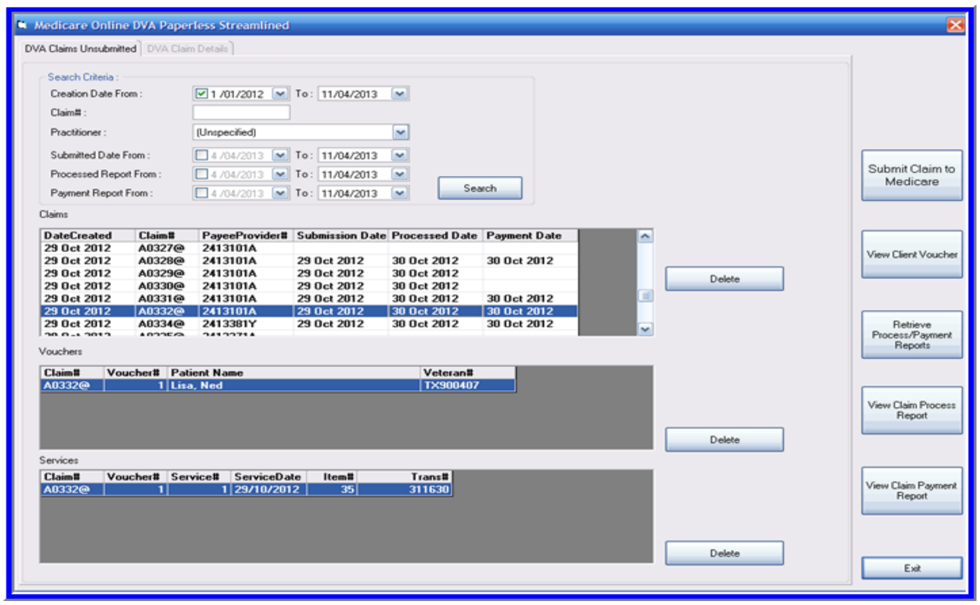


- Report displays Claims that have been paid
- Exit

To View / Transmit Claims

On the Main Screen of PPMP

- Go to Accounts
- Transmit Medicare DVA Claims



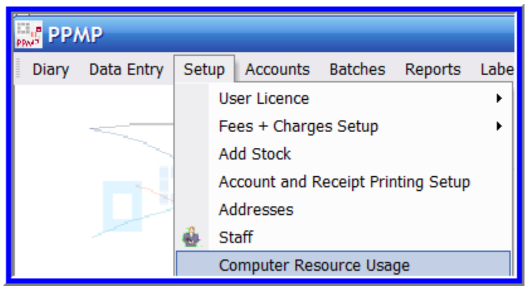
- Insert Date Range
- Click Search
- The display will show all Claims that have been Submitted, Processed and Paid within the selected search parameters.

2 HICAPS

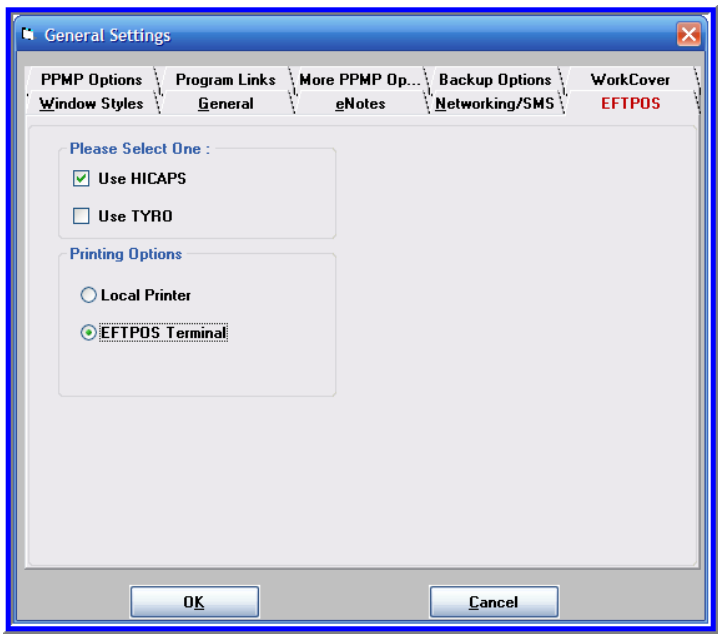
2.1 HICAPS installation & activation

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®



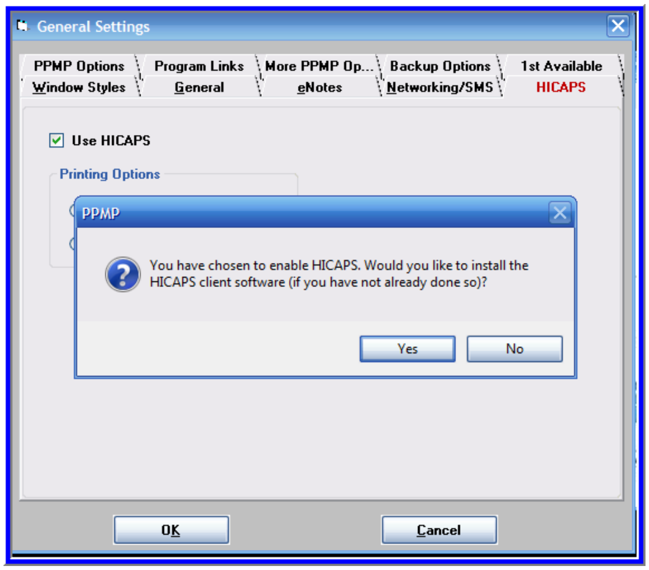
- Click on the Setup Menu
- Click on 'Computer Resource Usage'
- Click on the EFTPOS tab



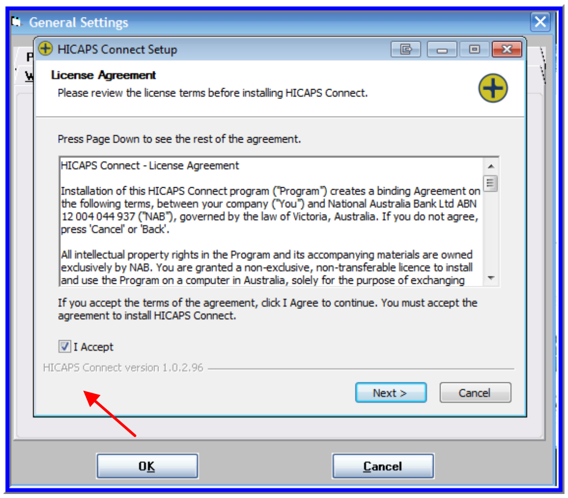
- Click OK
- Tick "Use HICAPS"
- Tick "HICAPS Terminal"
- Click OK

Restart the program for the activation to start.

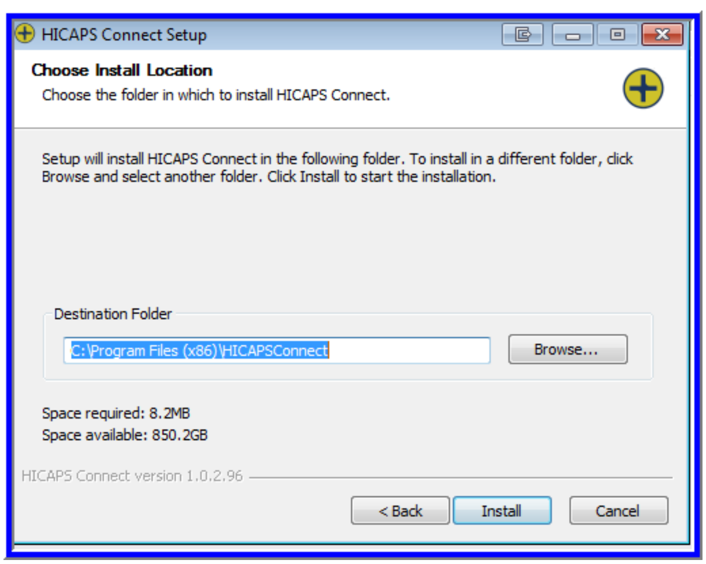
NB: If this is the first time you do not already have the correct HiCaps software installed on your computer you will be prompted to install it. (see below)



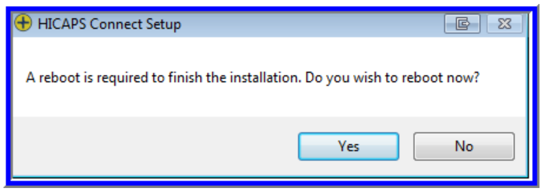
- Click YES to install HIPCAPS software.



- Click the “I Accept box”
- Click Next

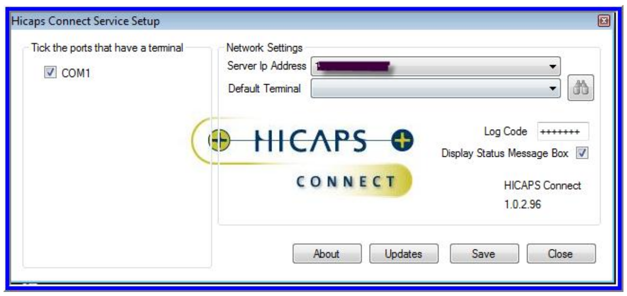


- Click Install

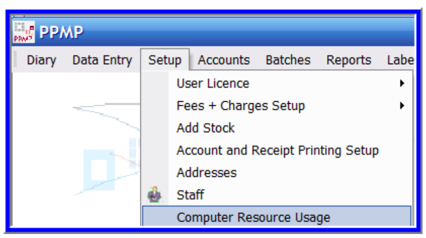


- Click Yes to reboot the computer and allow the installation to finish.
- Once the reboot is complete restart PPMP®.
- A new Hicaps Connect screen will appear leave the default settings and just click save.
- Hicaps will finish the setup and find the terminal. (As long as the terminal is connected to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

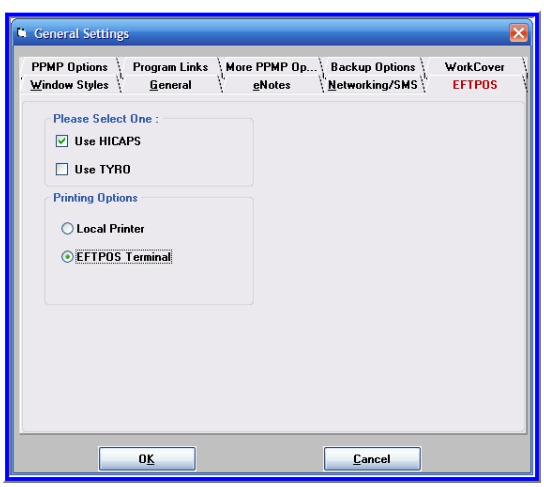
NB: If there is any issue at this stage with your computer and your Hicaps terminal connecting please contact Hicaps and advise them "your **computer** and **terminal** wont connect to each other" before turning Hicaps on in PPMP®



- 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

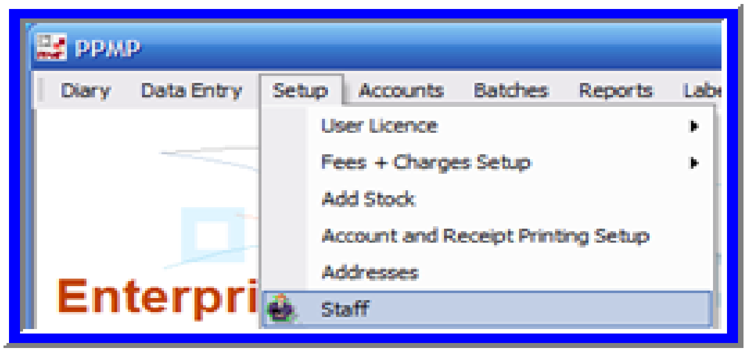


- Tick "Use HICAPS"
- Tick "EFTPOS Terminal"
- Click OK

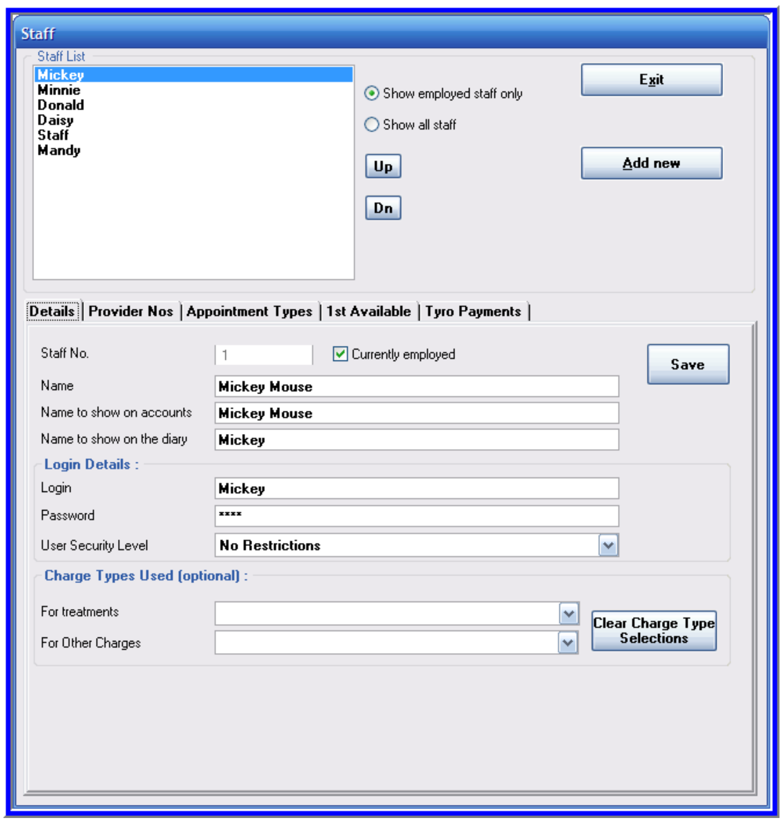
Restart the program for the activation to start.

2.2 HICAPS staff setup

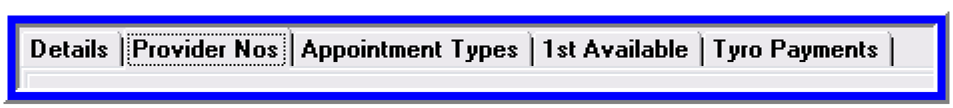
Click HERE to watch video



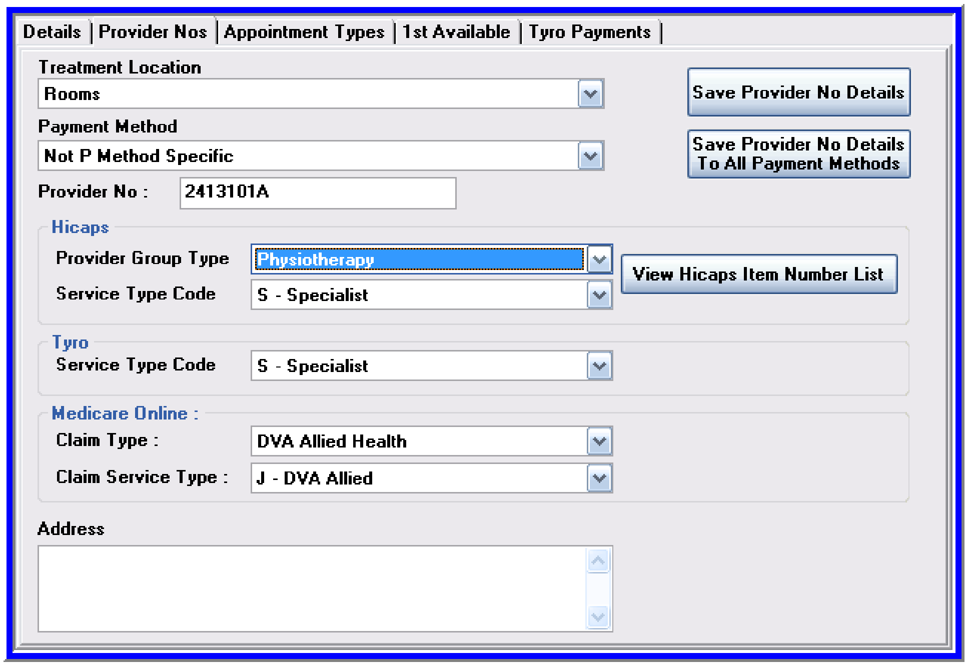
- Go to Setup
- Click Staff



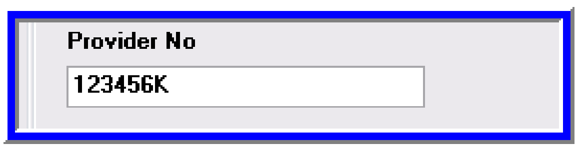
- Select Staff Member



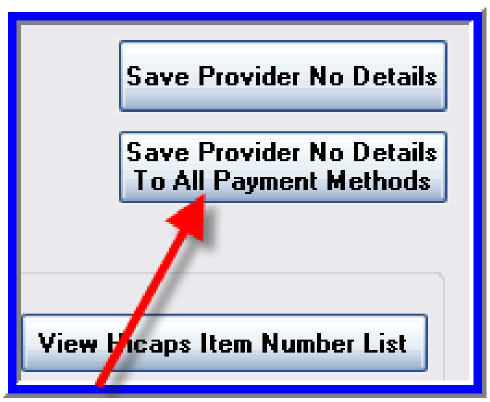
- Select Provider Nos tab



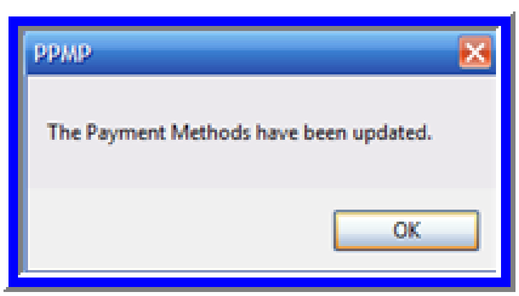
- Select HICAPS Group Item Type



- Insert Provider Number



- Click Save Provider Details to ALL Payment Methods



- Click OK
- Click Save Provider Details

- 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

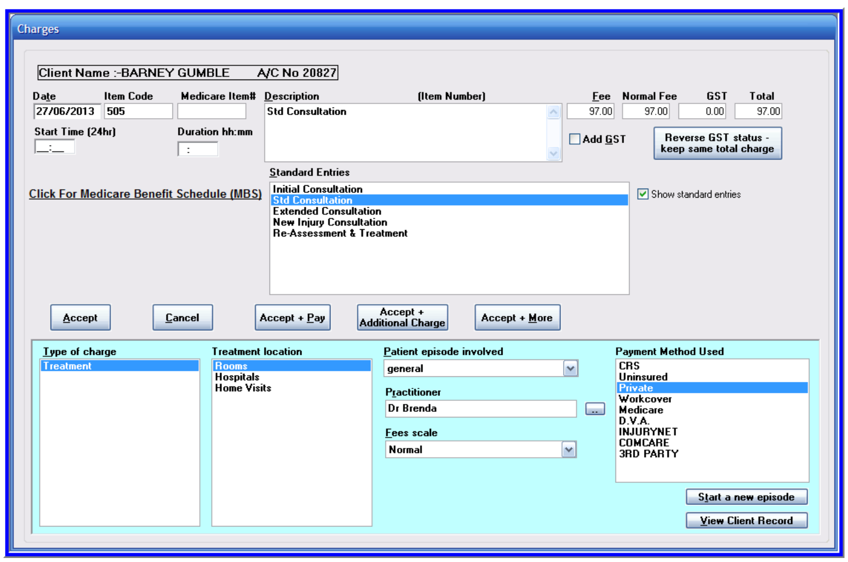
- Exit

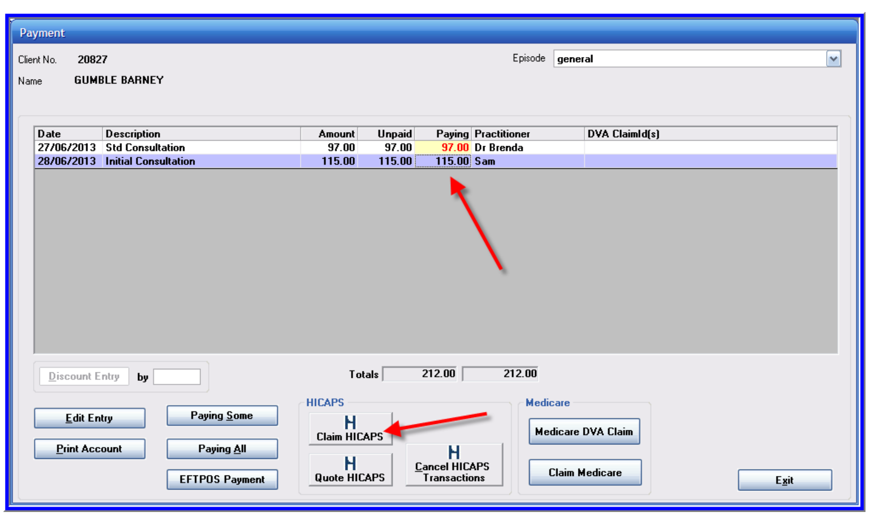
2.3 Using HICAPS Connect with PPMP®

2.4 Processing a claim

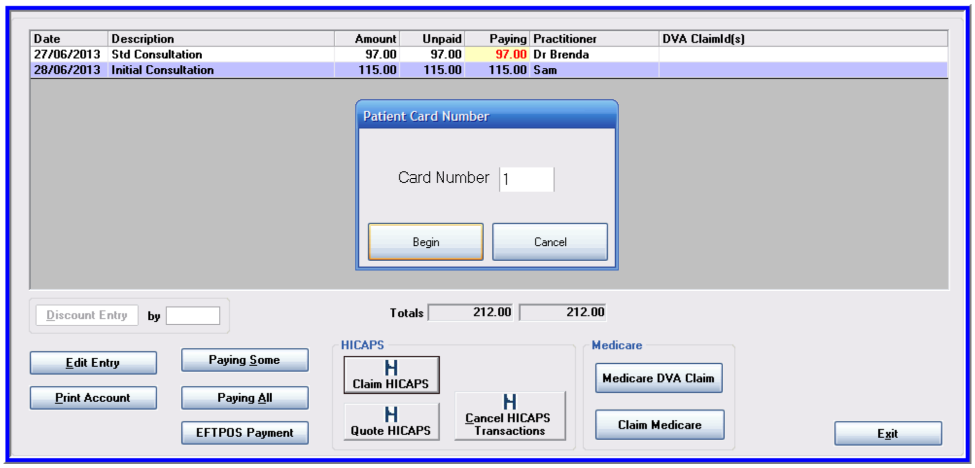
From the PPMP® Diary,

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

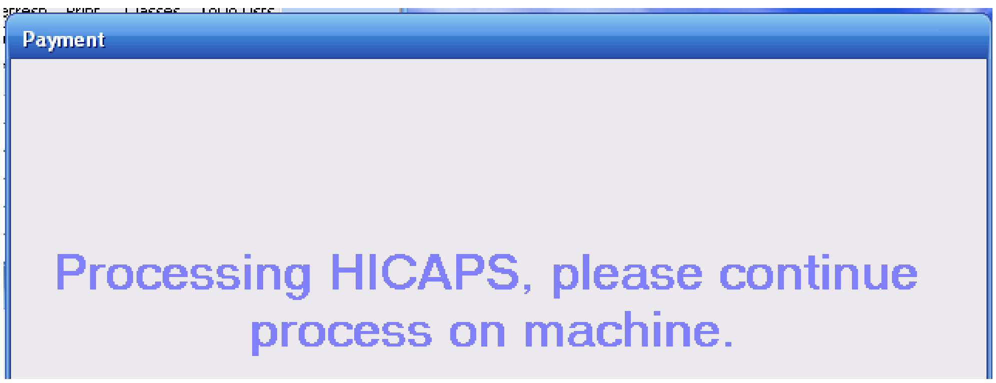




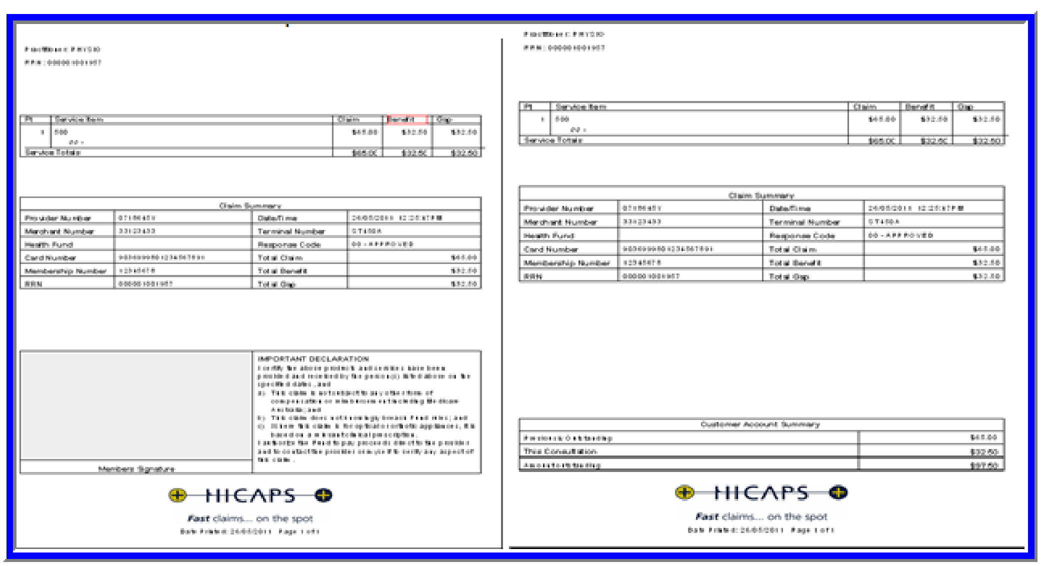
- Double click in the "paying" field to enter the full payment amount, select the Claim HICAPS button.



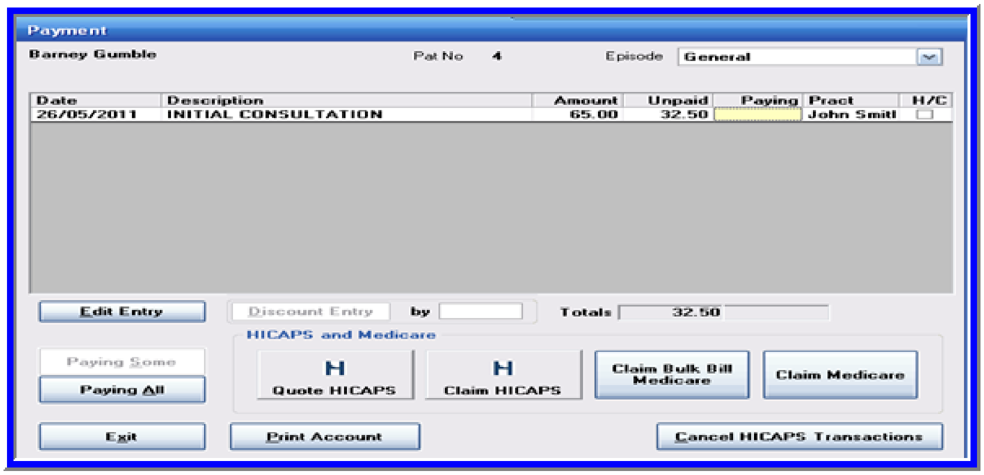
- Enter the number corresponding with the patient name & press begin.
- PPMP® will display the following message



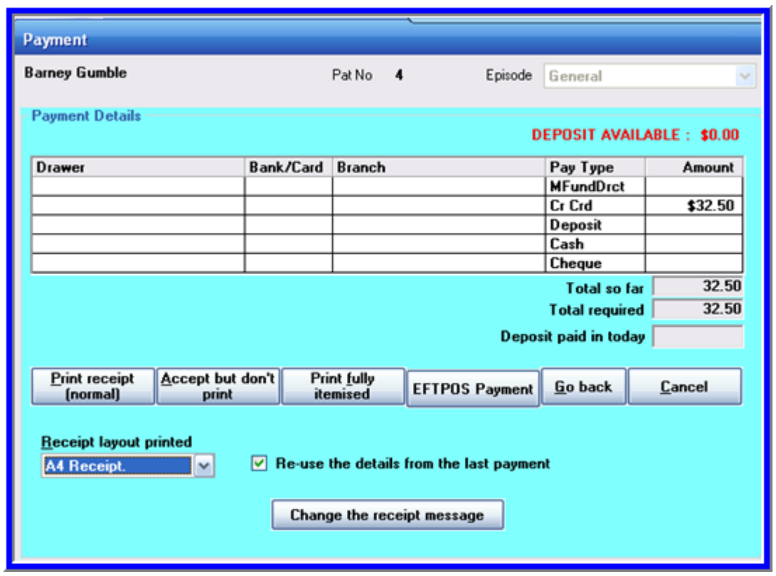
- The HICAPS terminal will prompt you to swipe the patient's card & display your computers name.
- Once the process has completed successfully, PPMP® will display & print the claim summary for you & the Patient. See examples below.



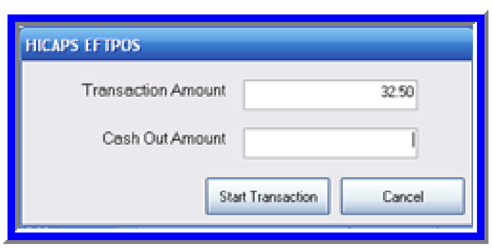
- PPMP® will return you to the payment window, you will notice the Hicaps claim amount has already been deducted from the total amount owing, you can pay the remaining balance or exit.



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

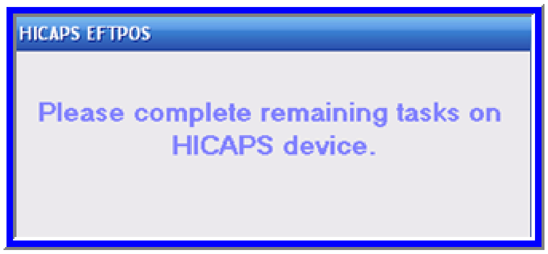


- From the payment window, select the payment type & accept the transaction.
- To pay via EFTPOS Payment, enter the amount & select EFTPOS Payment.



- Enter the amount & press Start Transaction.

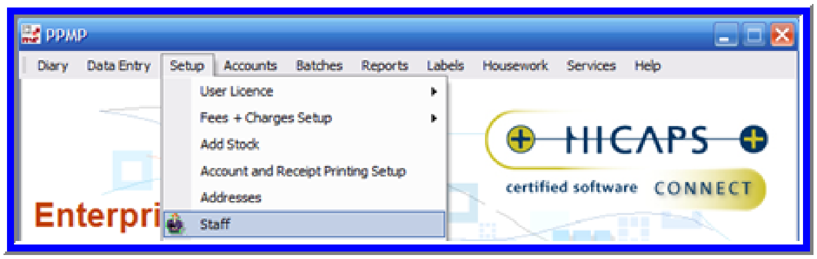
- Select your terminal & press Choose.



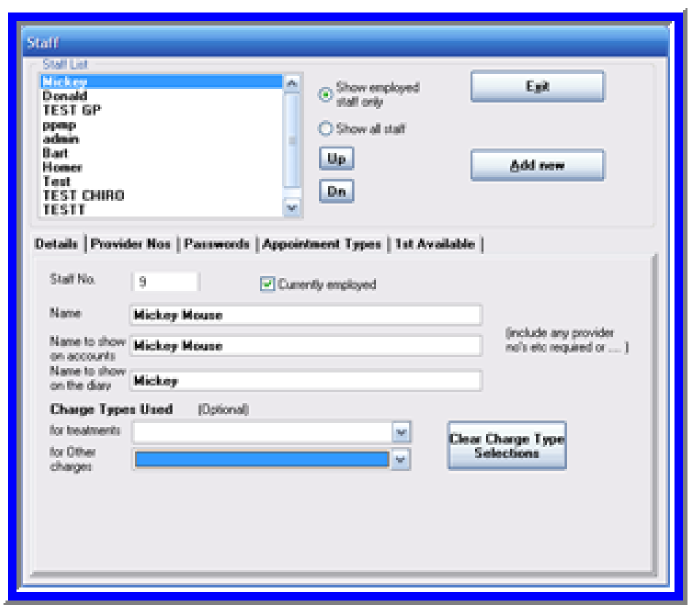
- Complete the transaction on the HICAPS terminal & PPMP® will print a receipt.

2.5 HICAPS - Medicare Easyclaim & staff setup

From the Main Menu

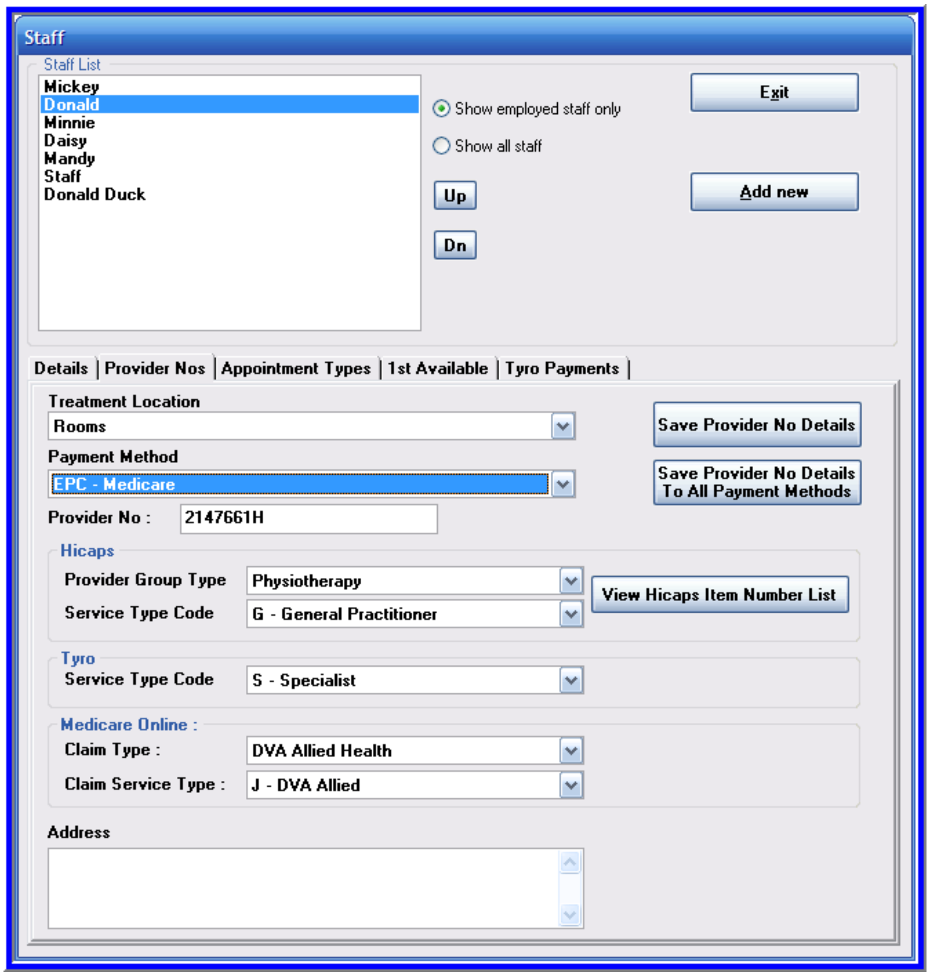


- Go to Setup
- Staff



- Select the staff member

- Click the Provider No tab.

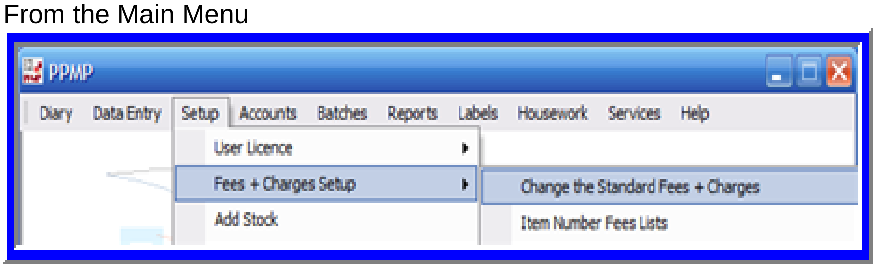


- Select your Medicare / EFT Payment Method
- Select Hicaps Provider Group Type
- Select Service Type Code
- Enter your provider number

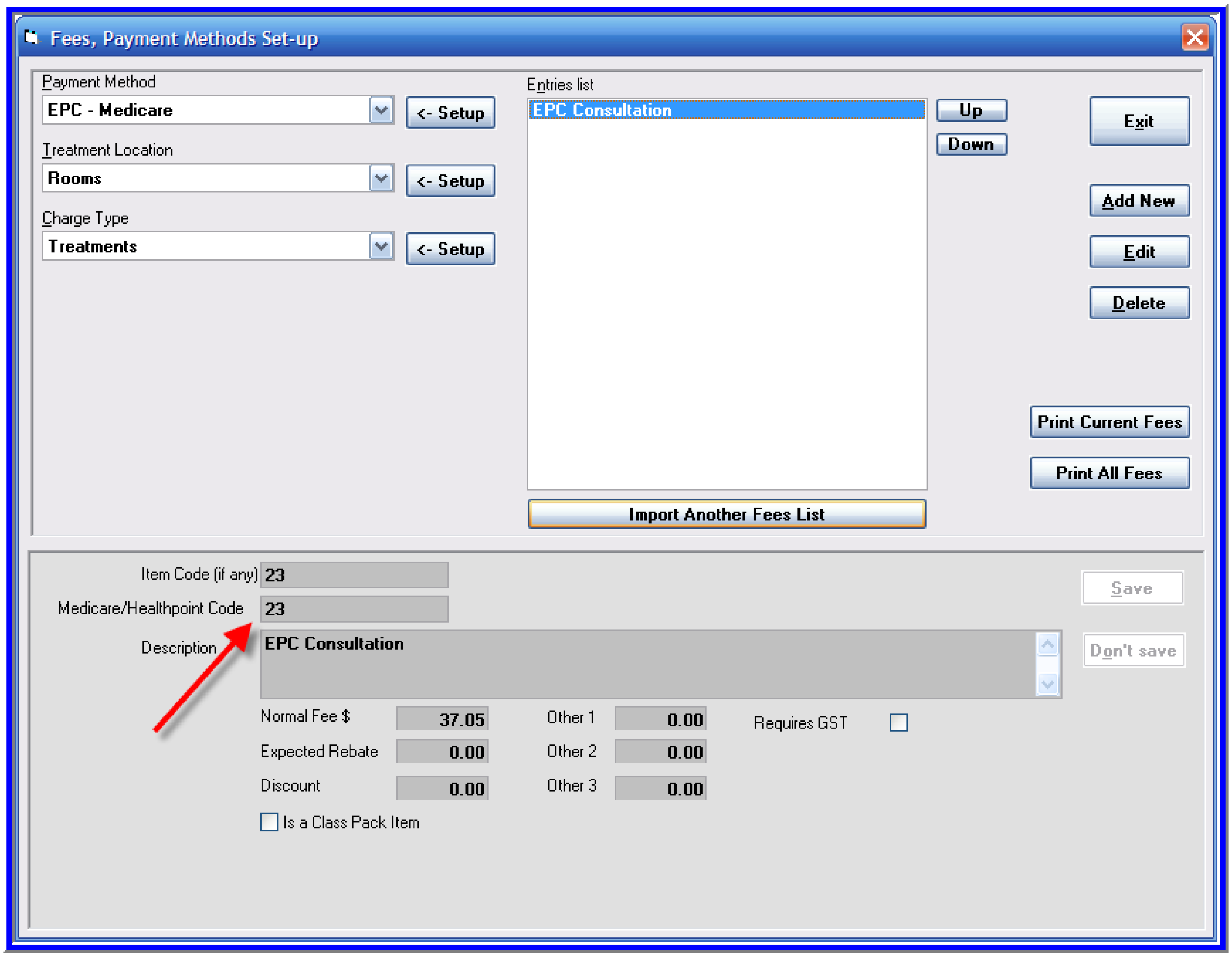
- Click Save Provider Details
- You must do this for **ALL** staff members

2.6 HICAPS - Fees & charges setup for EPC

From the Main Menu



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



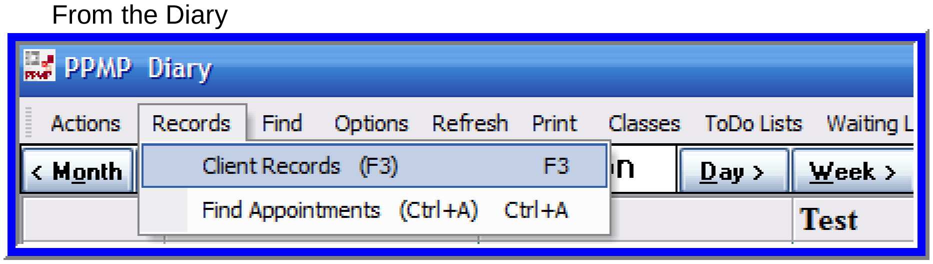
- Select the Medicare / EPC Payment Method
- Add or edit the Fees

  NB: Make sure the appropriate item code is entered into the Medicare/Healthpoint Code field.

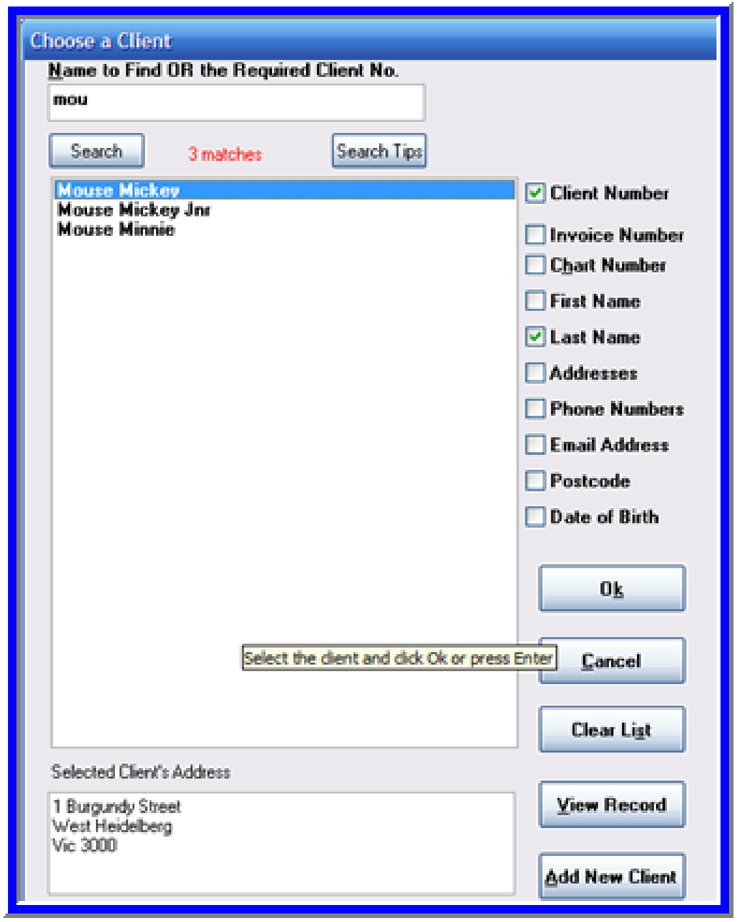
2.7 HICAPS - Medicare/EPC Episode

2.8 Client setup/create a new client record or setup

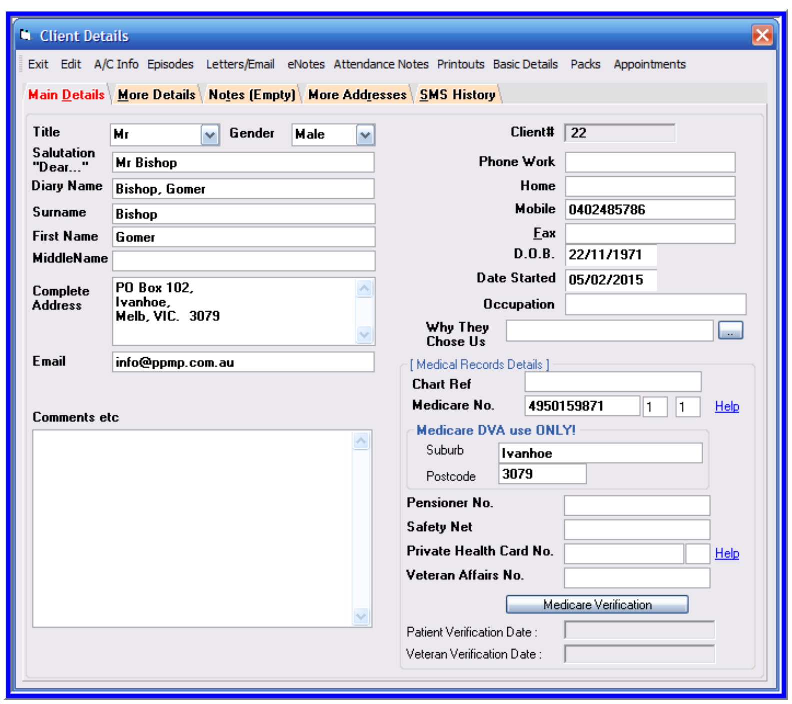
From the Diary



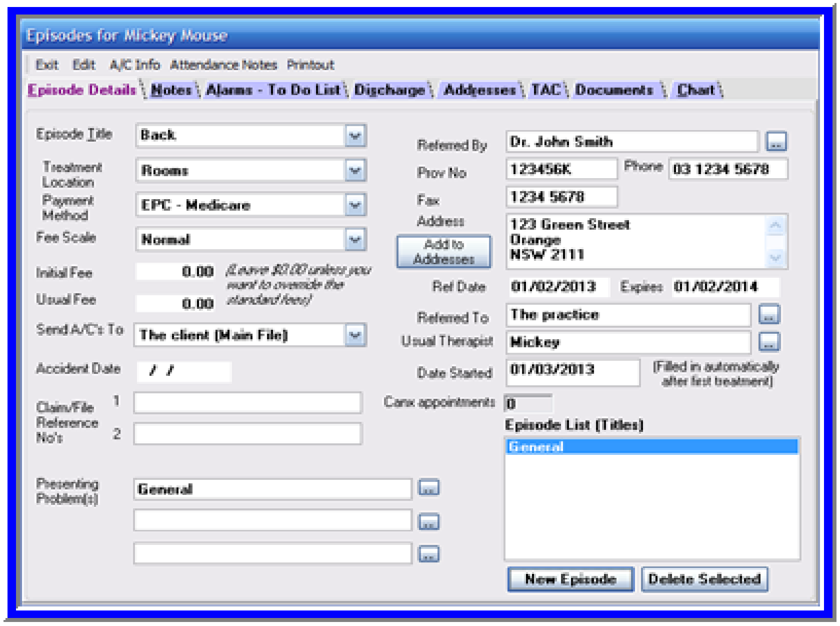
- Go to Records
- Client Records



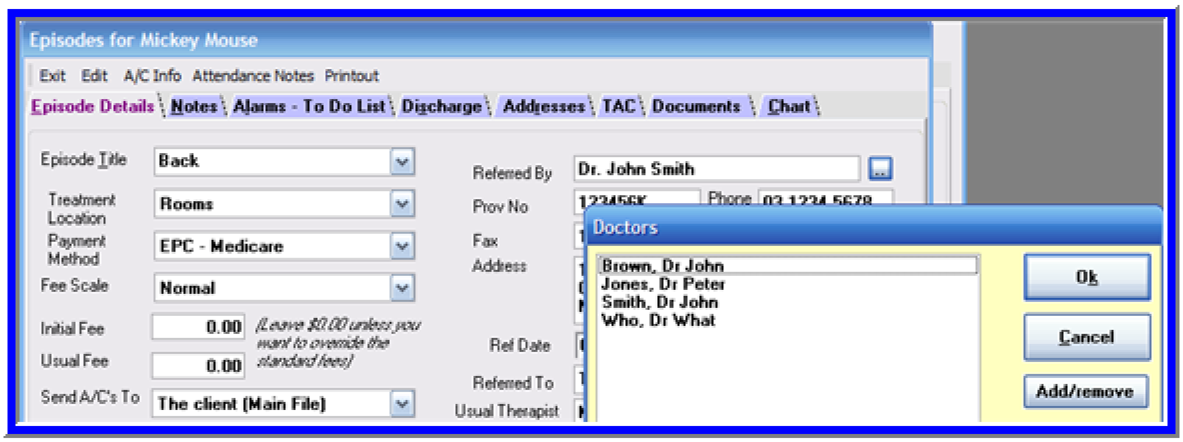
- Search for the client name or add a new client.



- 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



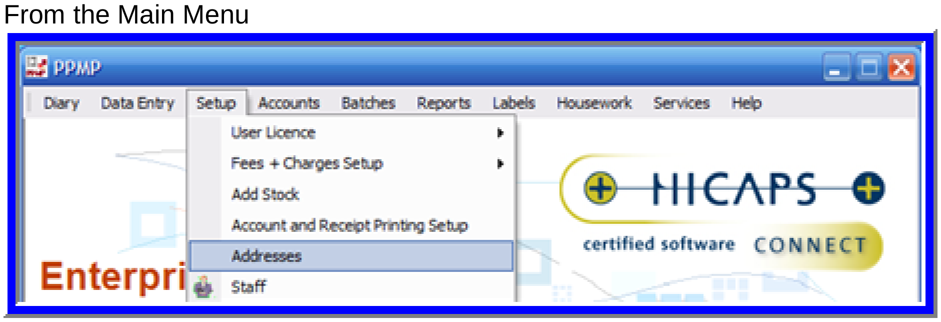
- Fill in ALL the episode details
- Select the correct Payment Method
- Enter the referral details.



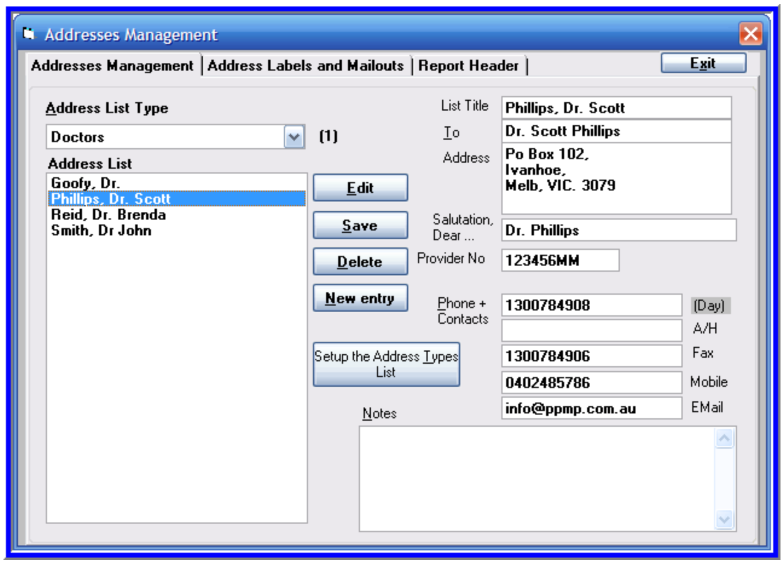
- Use the browse button to select a doctor from the list or enter the information at the time.

2.9 Referring doctors setup

From the Main Menu



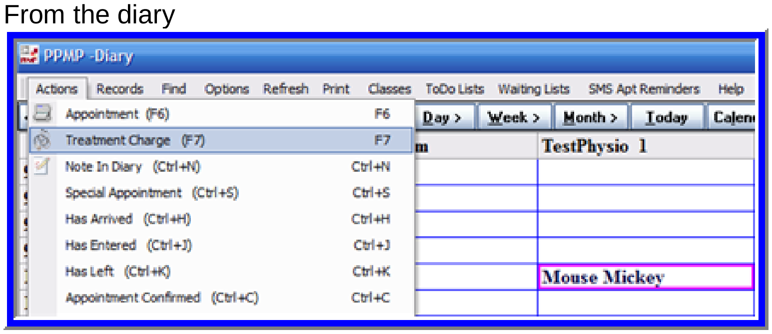
- Go to Setup
- Addresses



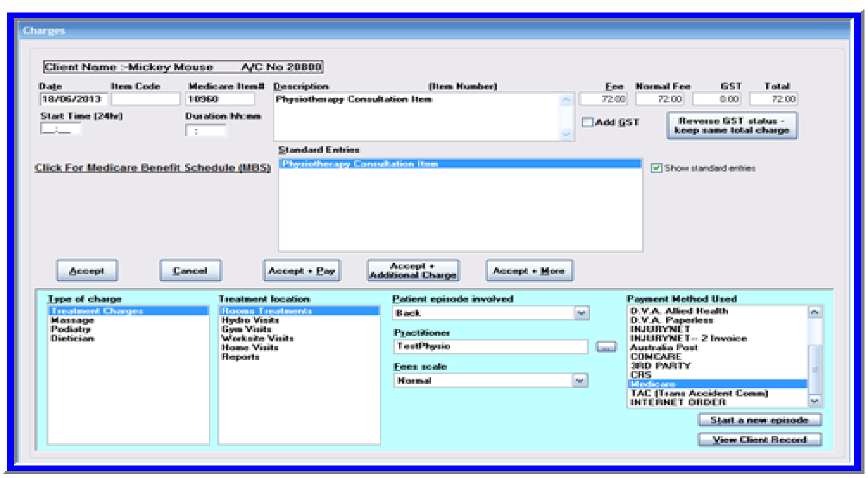
- Add or Edit the address list of the doctors
  (Including Doctor's provider numbers)

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

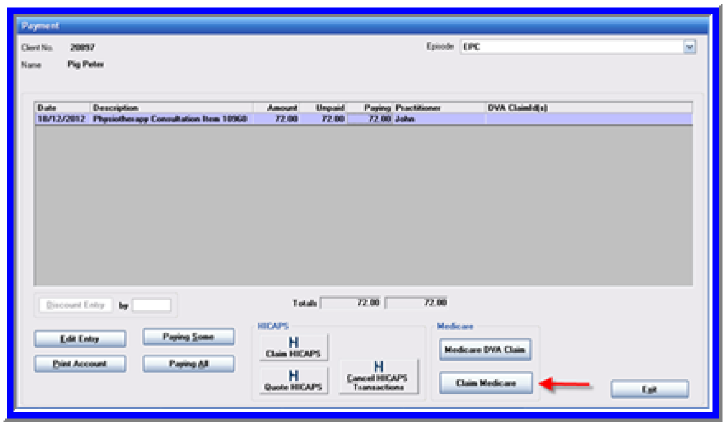
From the diary



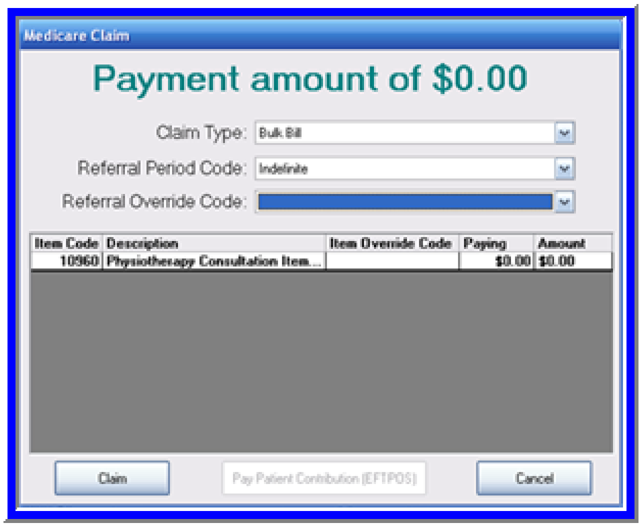
- Select Client
- Click Actions
- Select Treatment Charge



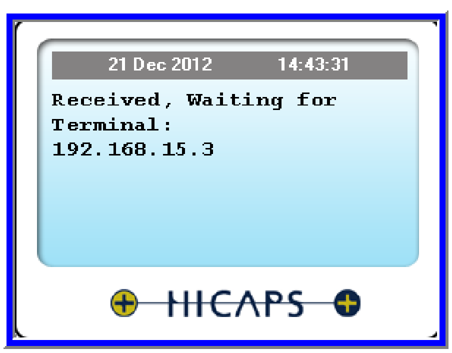
- Select the charge from the entires list
- Make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner.
- If the client details have been setup correctly, all information will be pre filled.
- Press Accept and Pay



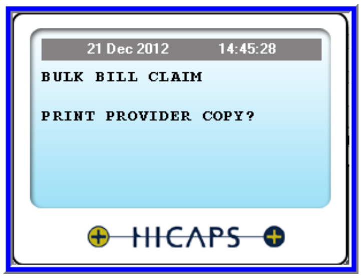
- Double click in the Paying field
- Press the Claim Medicare Button.



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

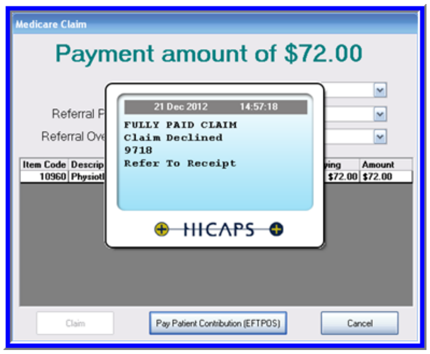


- Follow the prompts on the screen & terminal to process the claim.



- Follow the prompts to process & print receipts

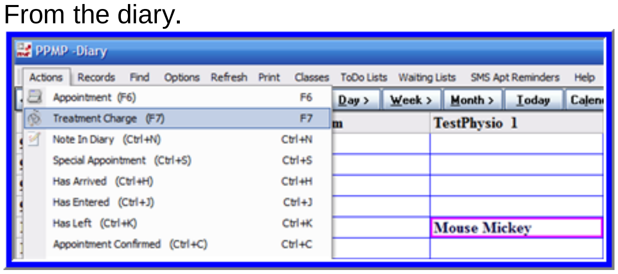
You will be advised of the outcome of the claim*



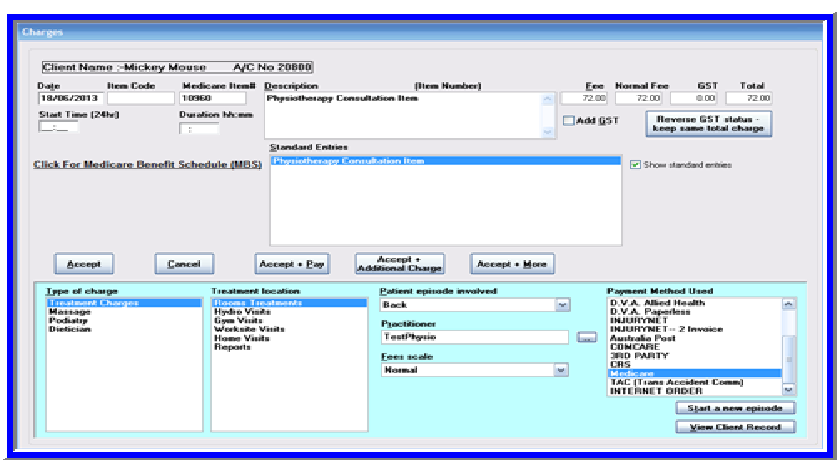
- *for testing purposes this screen shot has been included.

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

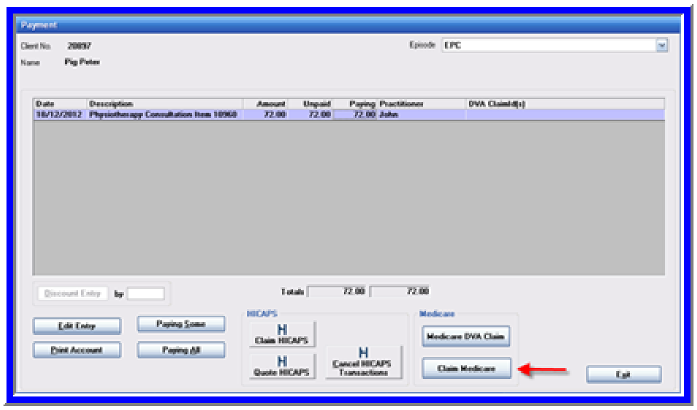
From the diary.



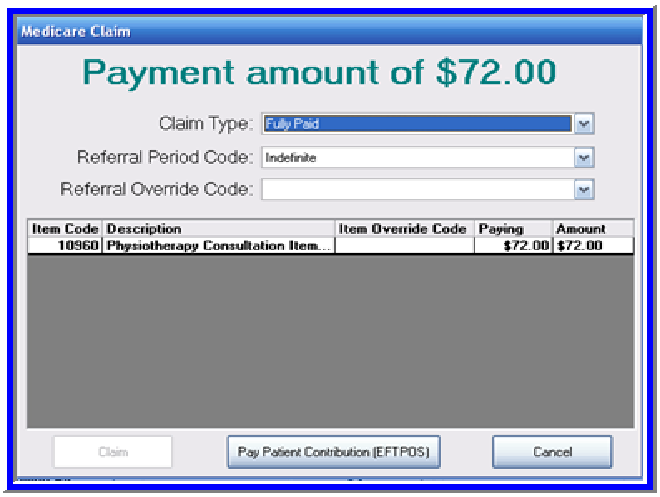
- Select the client
- Click Treatment Charge



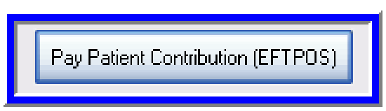
- Select the charge from the entires list, make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner. (If the client details have been setup correctly, all information will be pre filled)
- Press Accept & Pay the transaction



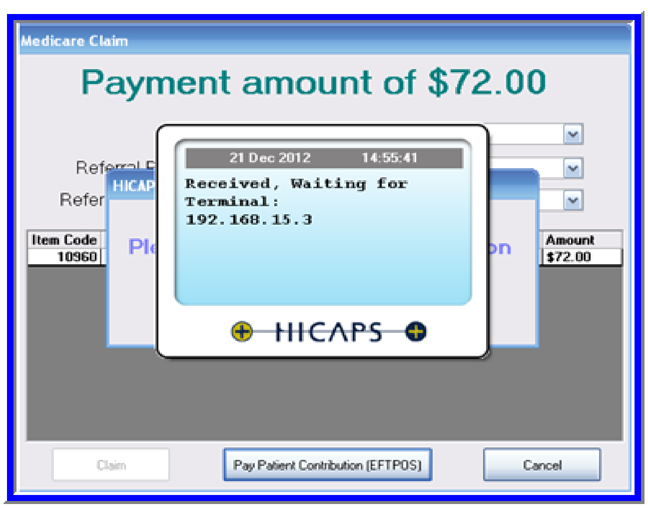
- Double click in the Paying field
- Click Claim Medicare Button.



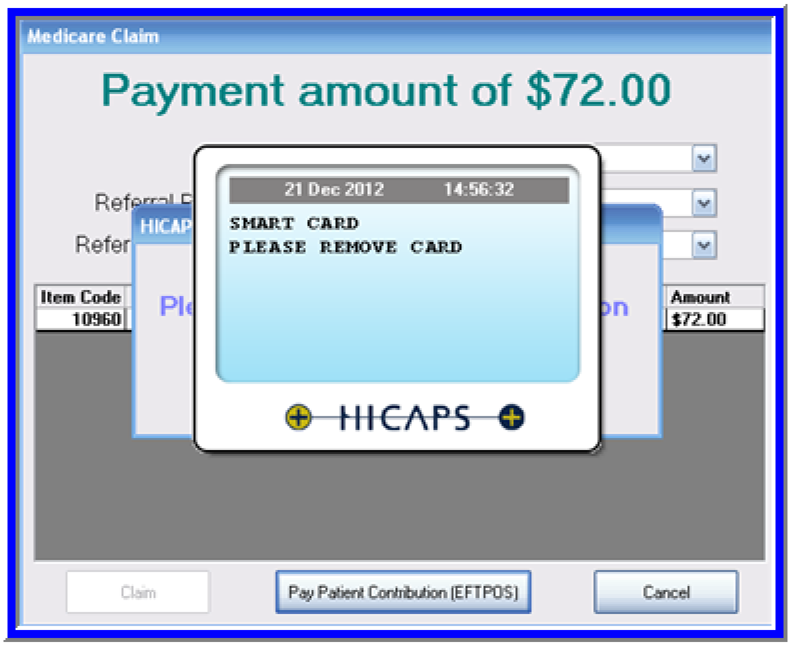
- Select the Claim Type



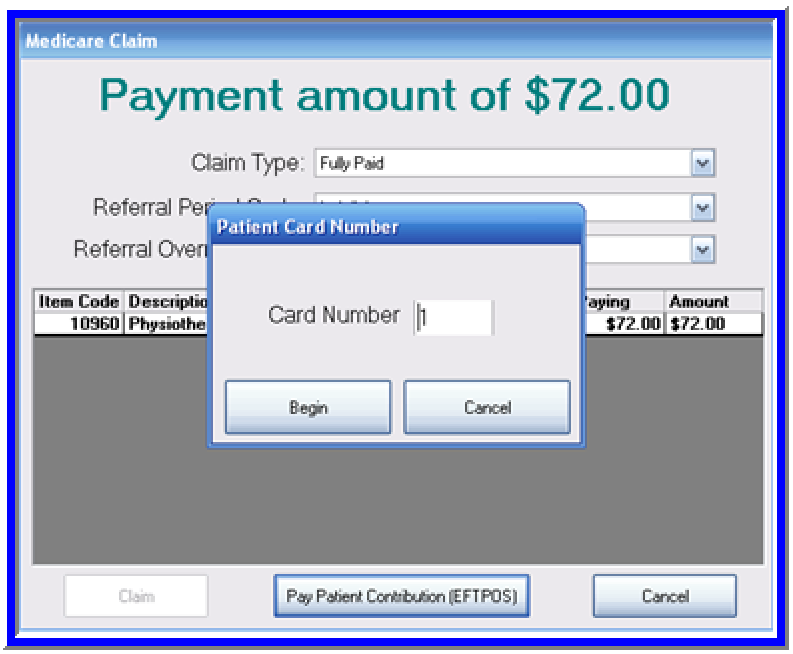
- Click Pay Patient Contribution (EFTPOS)
- If the Medicare Number is not filled out in the Patient Details, you are prompted to swipe/insert the card.



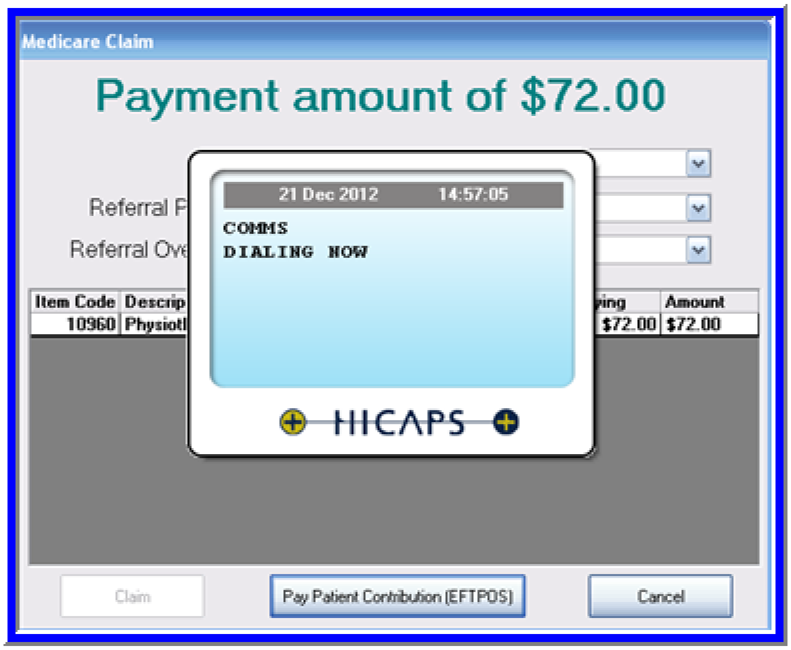
- Follow the prompts on the screen.



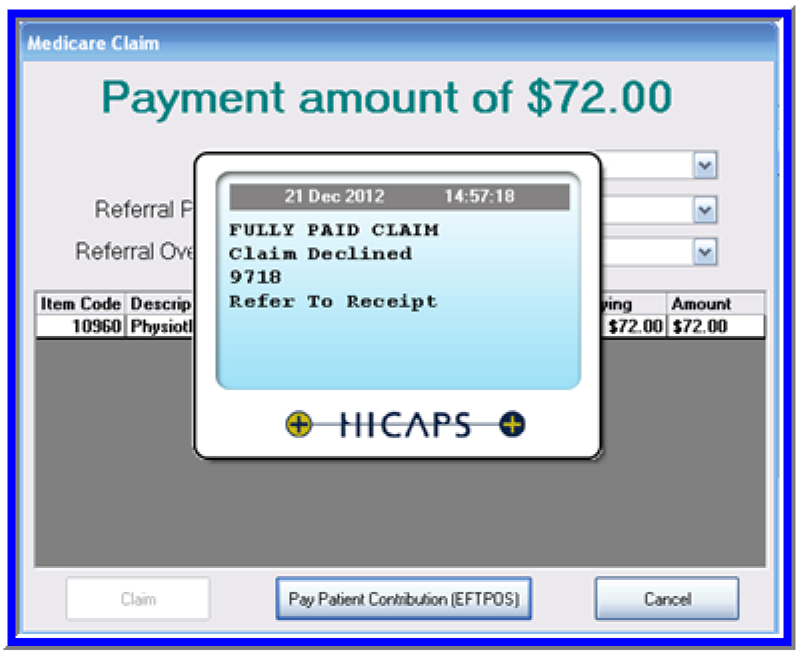
- Follow the prompts on the screen.



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



- Follow the prompts to complete the transaction



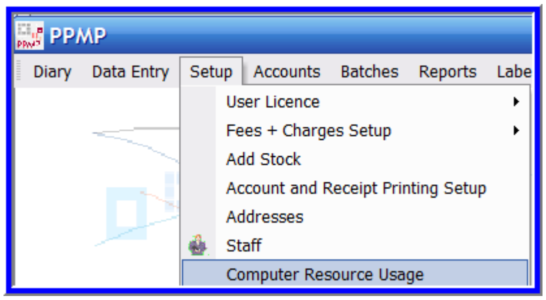
- Once the claim has been processed you will be advised of the outcome of the claim **for testing purposed this screen shot has been included.

3 TYRO

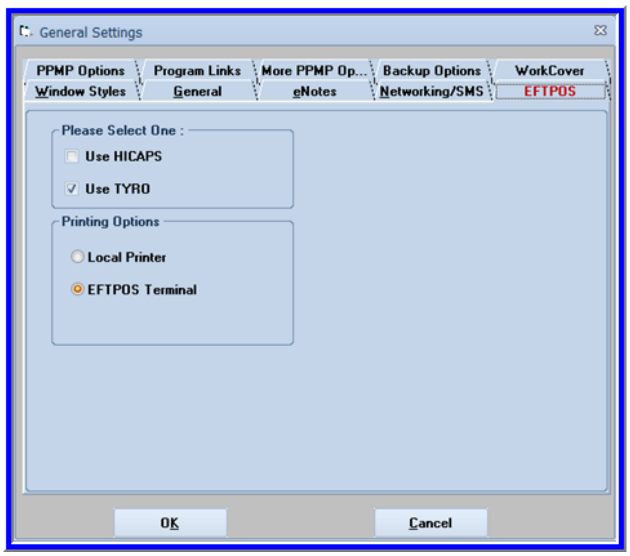
3.1 TYRO installation & activation

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®



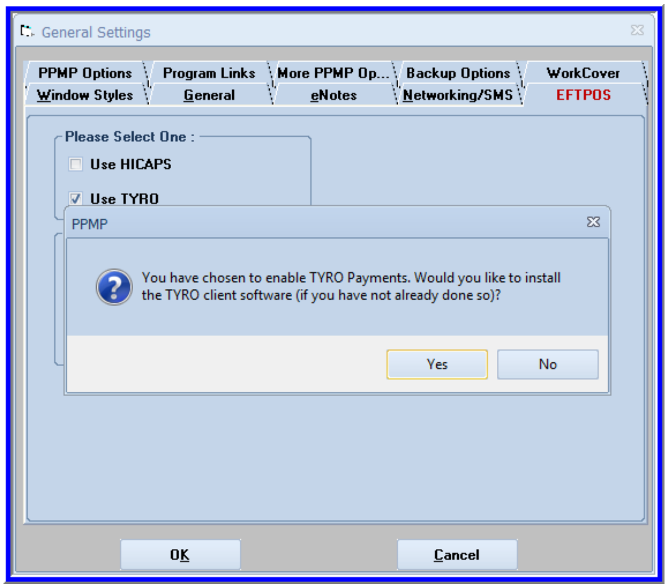
- Click on the Setup Menu
- Click on ‘Computer Resource Usage’
- Click on the EFTPOS tab



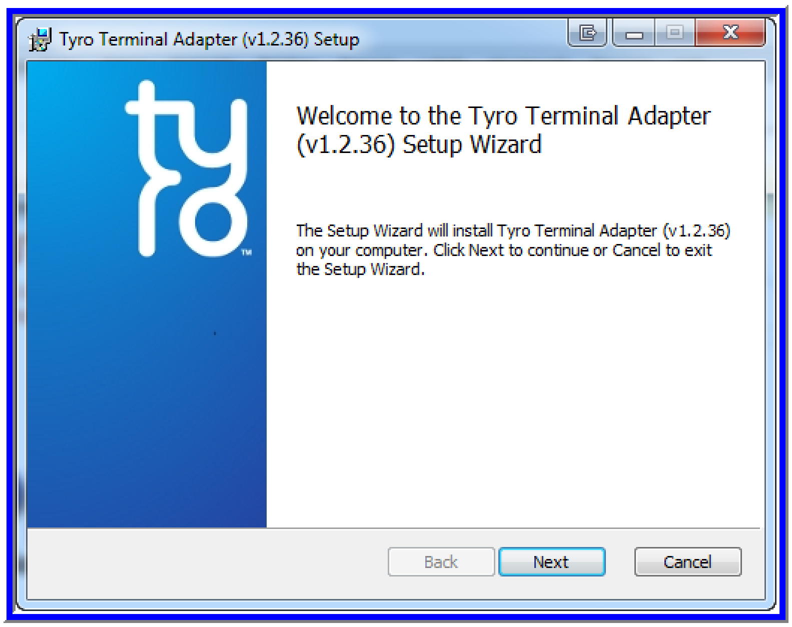
- Tick “Use TYRO”
- Tick “EFTPOS Terminal” – (for Printing direct to the terminal)
- Click OK

Restart the program for the activation to start.

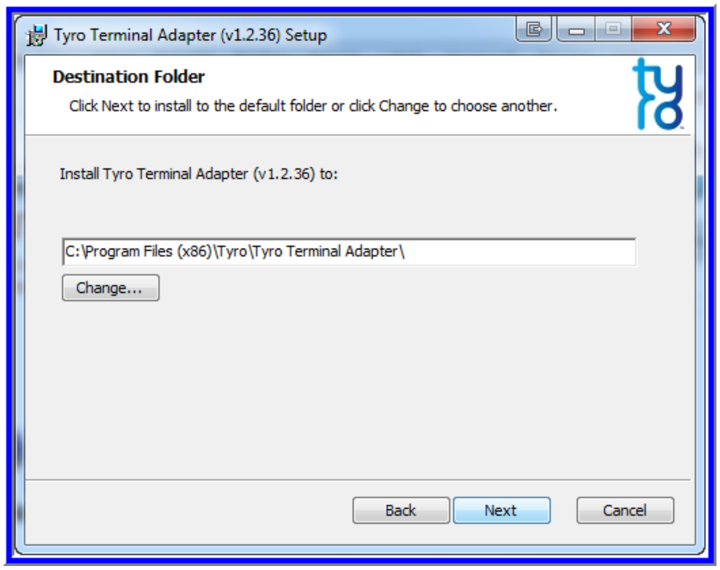
NB: If this is the first time you do not already have the correct Tyro software installed on your computer you will be prompted to install it. (see below)



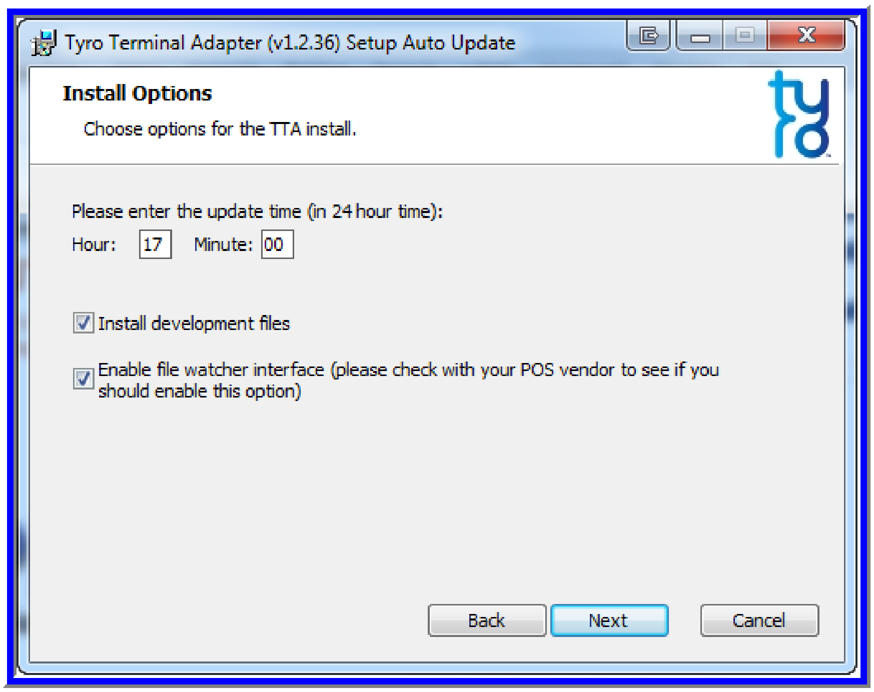
- Click YES to install TYRO software.



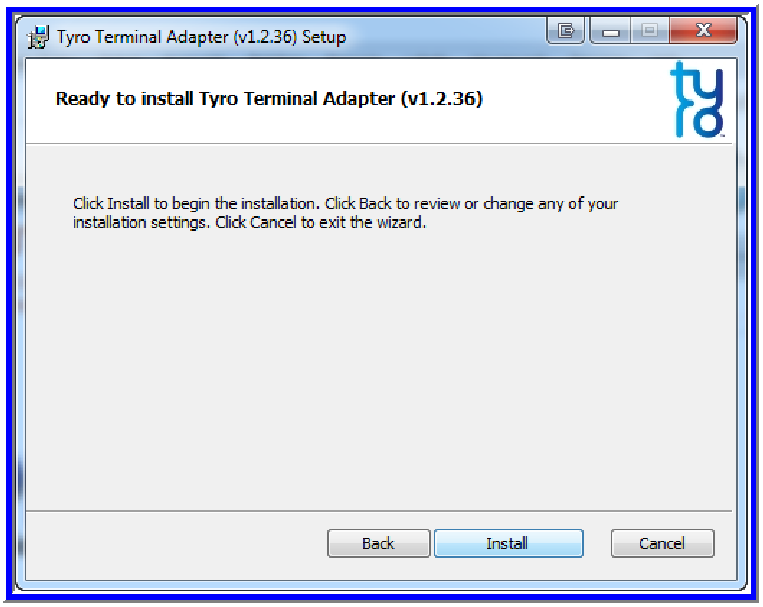
- Click Next



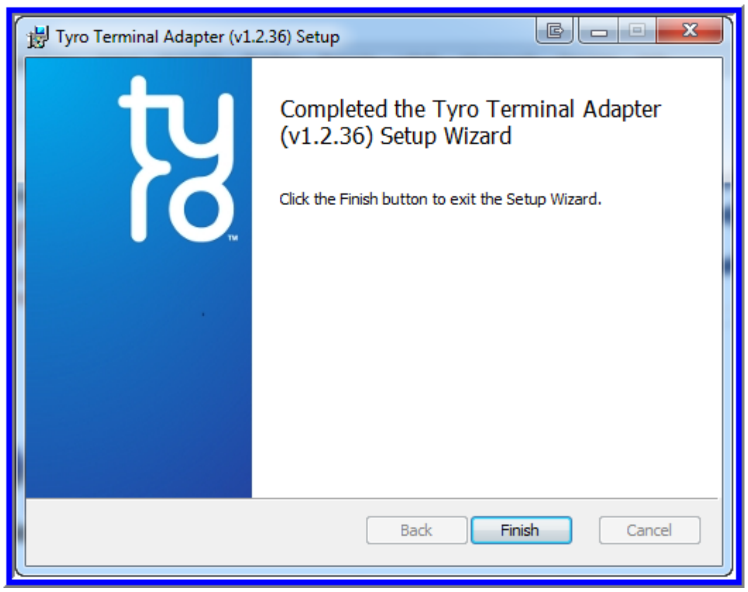
- Click Next



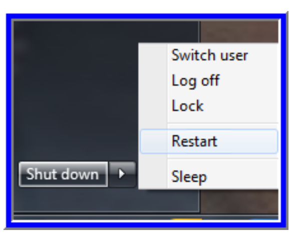
- Select an Auto Update time (this is for TYRO software only)
- Click Next



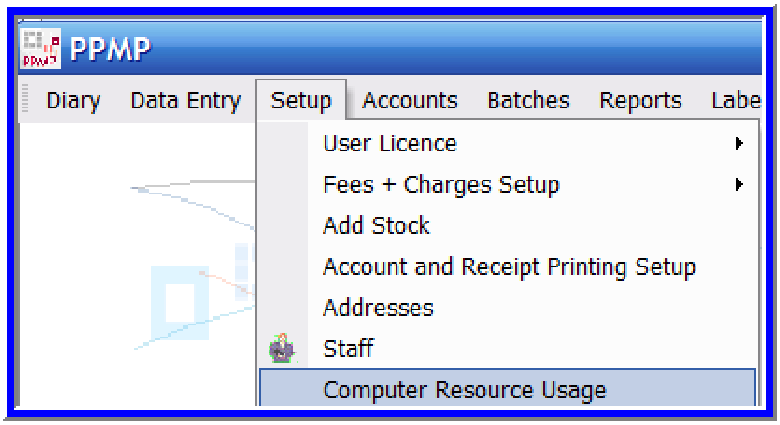
- Click Install



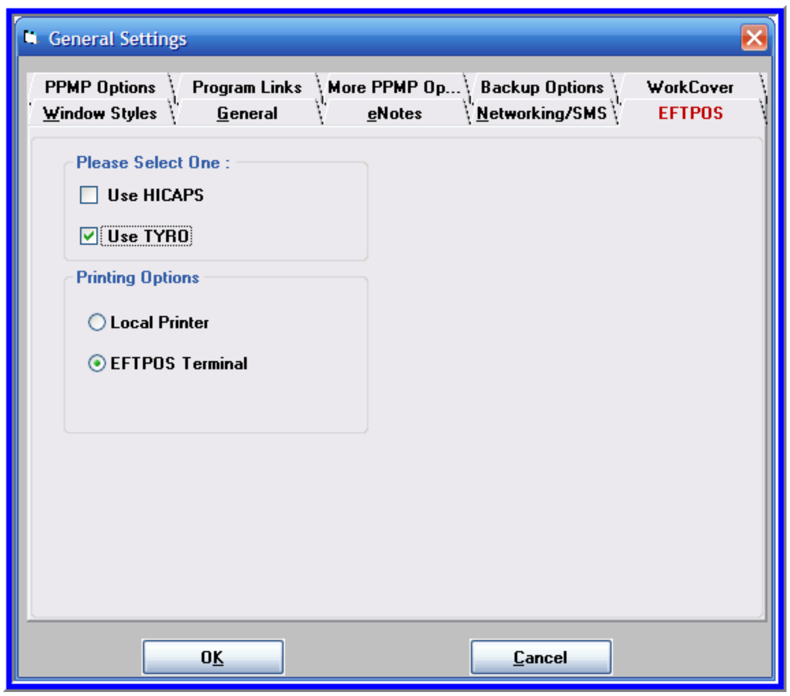
- Click Finish



- 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

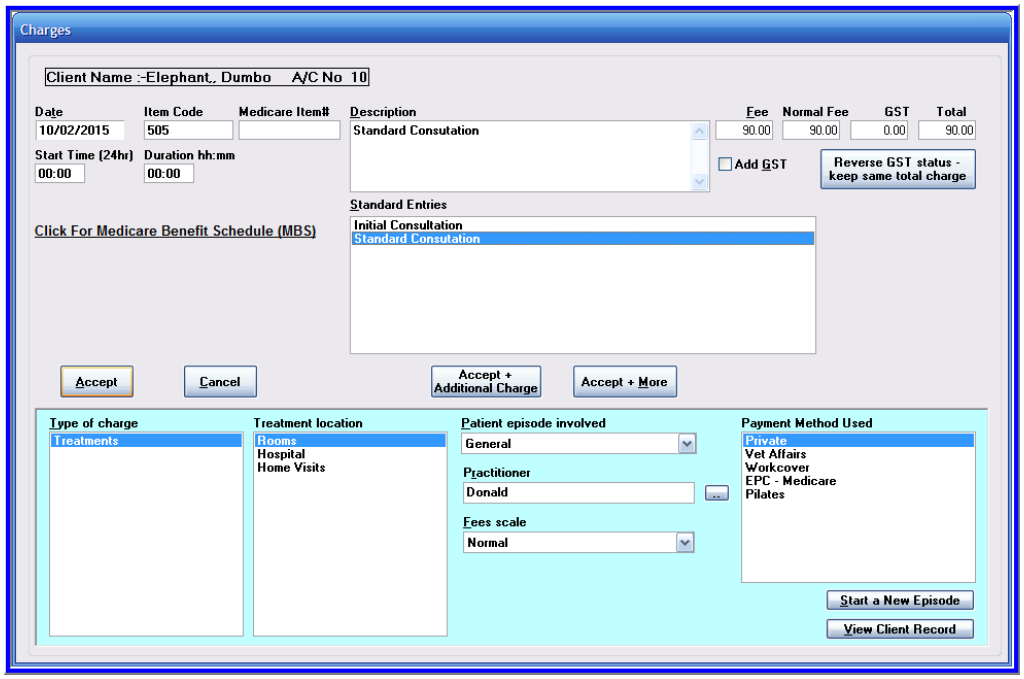
Restart the program for the activation to start.

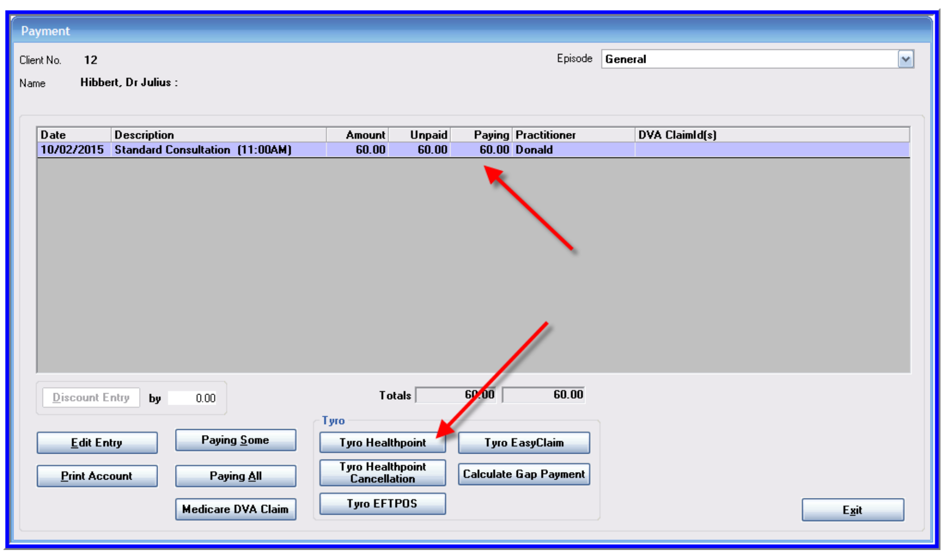
3.2 Using TYRO with PPMP®

Click HERE to watch video

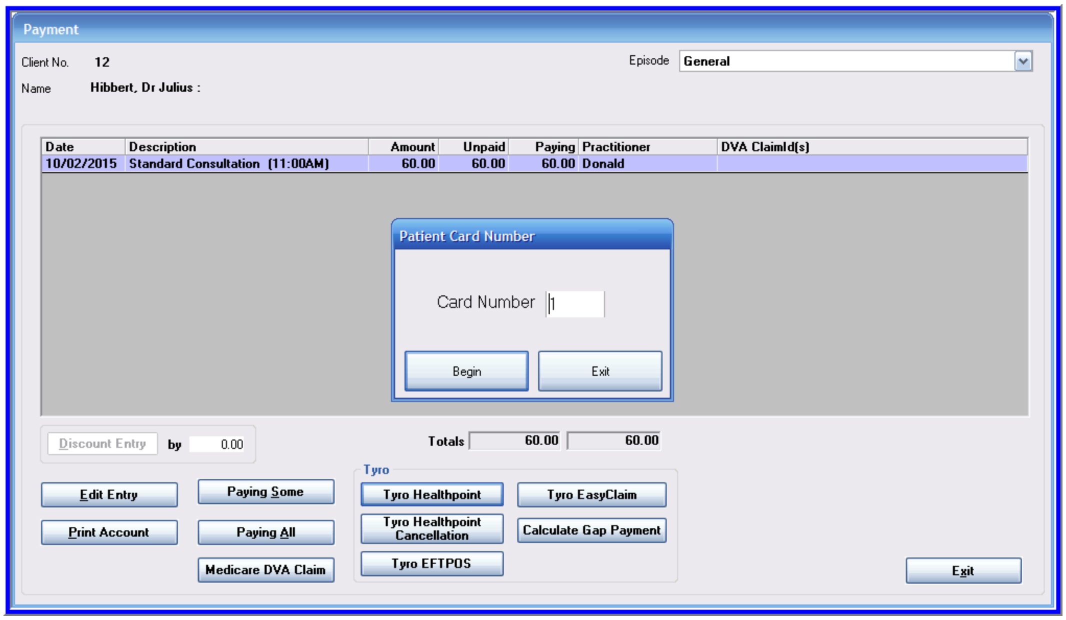
3.3 Processing a claim

- 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)





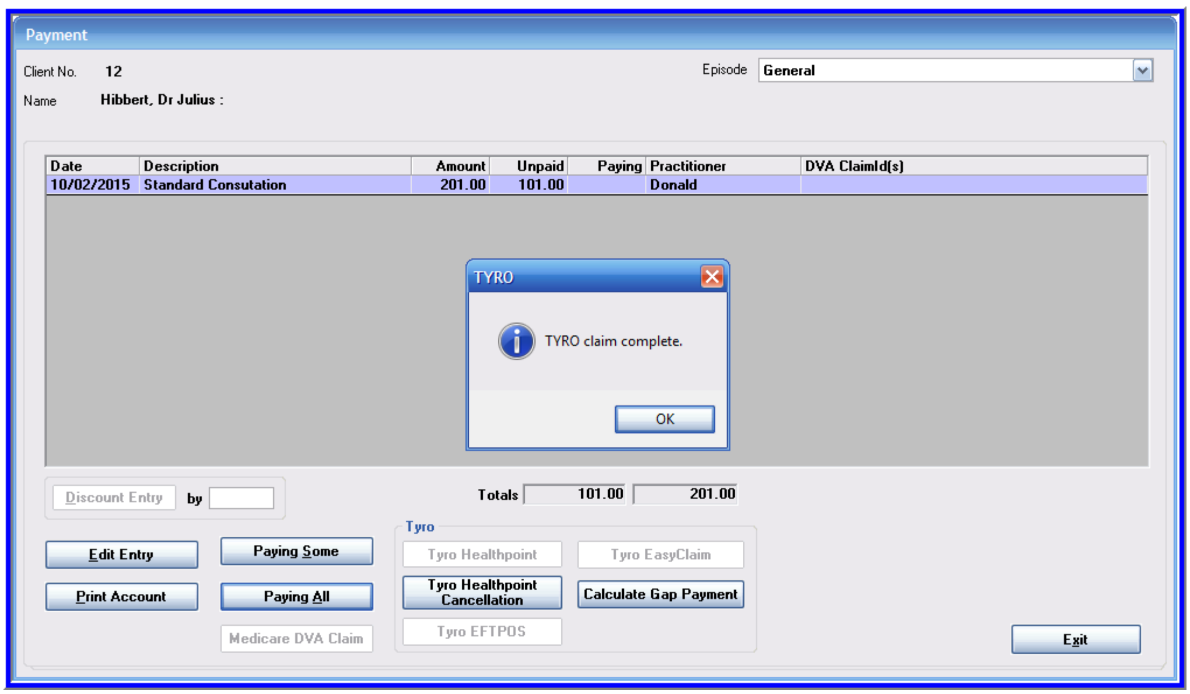
- Double click in the “paying” field to enter the full payment amount, select the Tyro Healthpoint button.



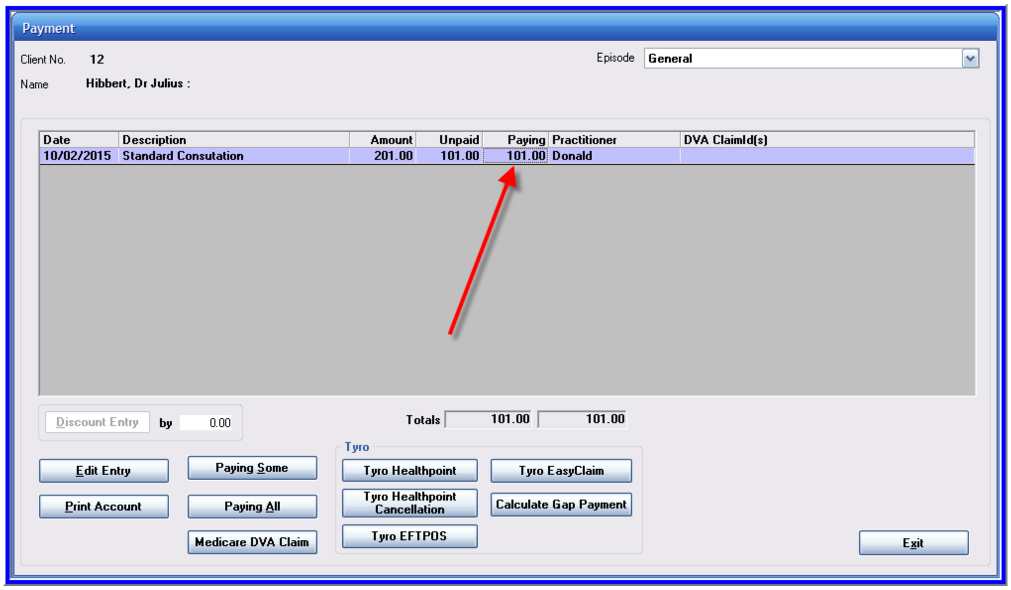
- Enter the number corresponding with the patient name & press begin.
- PPMP® will display the following message

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

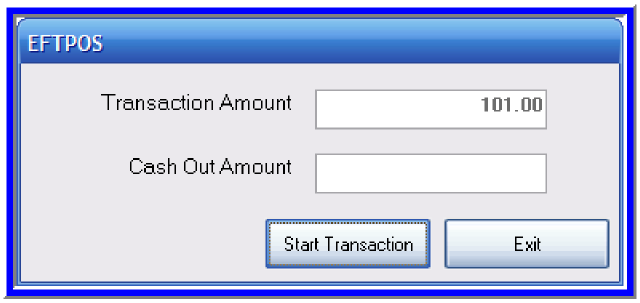
- Click accept to accept and process the health insurance claim.



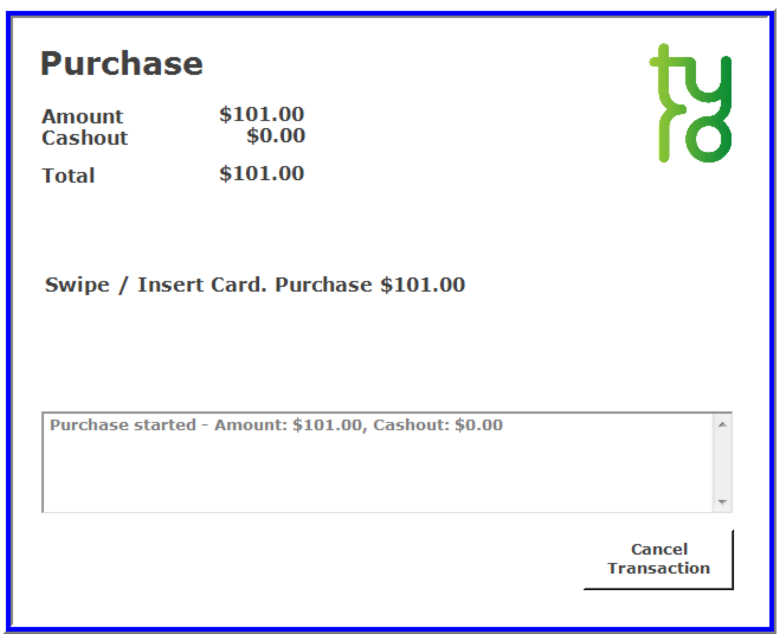
- Once the process has completed successfully PPMP® will return you to the payment window, you will notice the Tyro claim amount has already been deducted from the total amount owing, you can pay the remaining balance or exit.



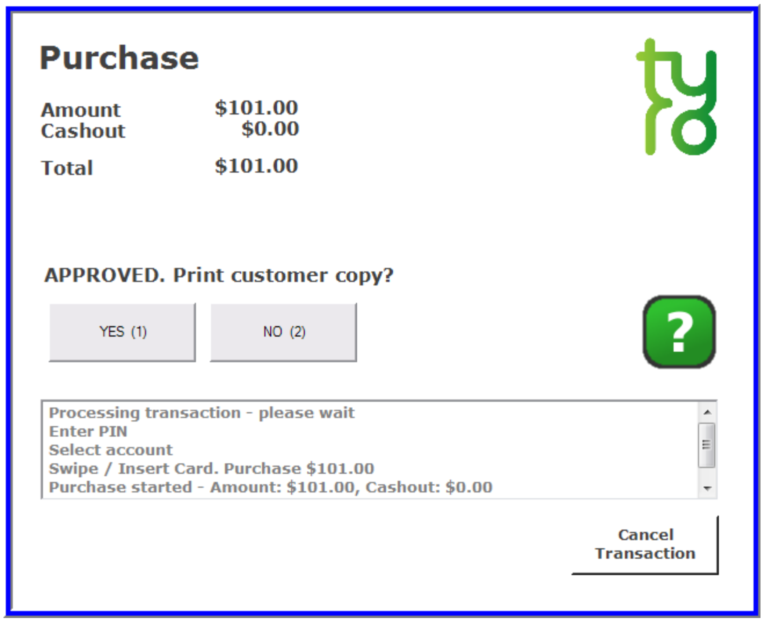
- To pay via EFTPOS Payment, enter the amount & select Tyro EFTPOS.



- Check the amount entered and click start Transaction.



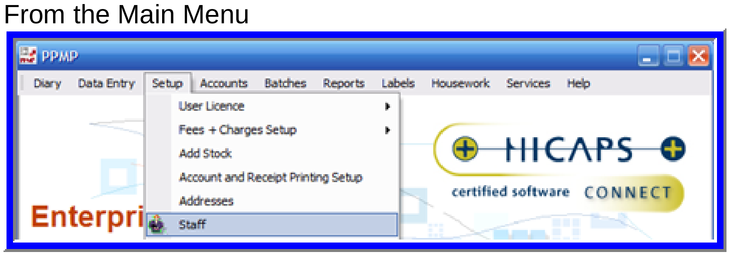
- The Tyro terminal will prompt you to swipe the patient's card.



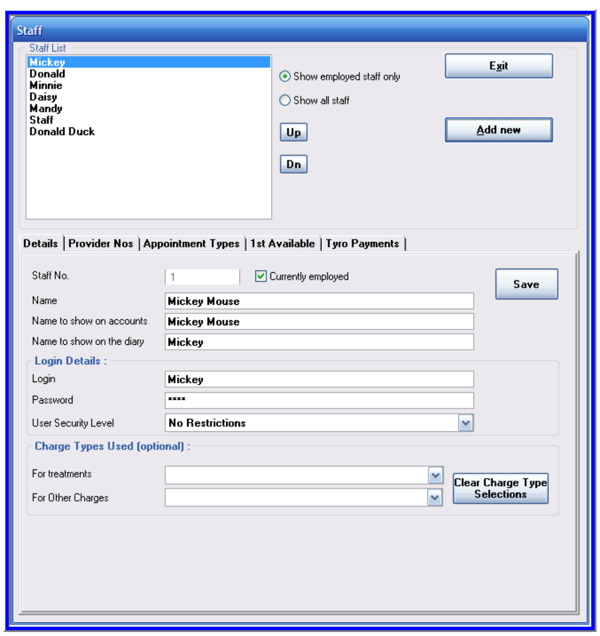
- Complete the transaction on the Tyro terminal & click yes to print a customer copy.

3.4 TYRO - Medicare EasyClaim & staff setup

From the Main Menu

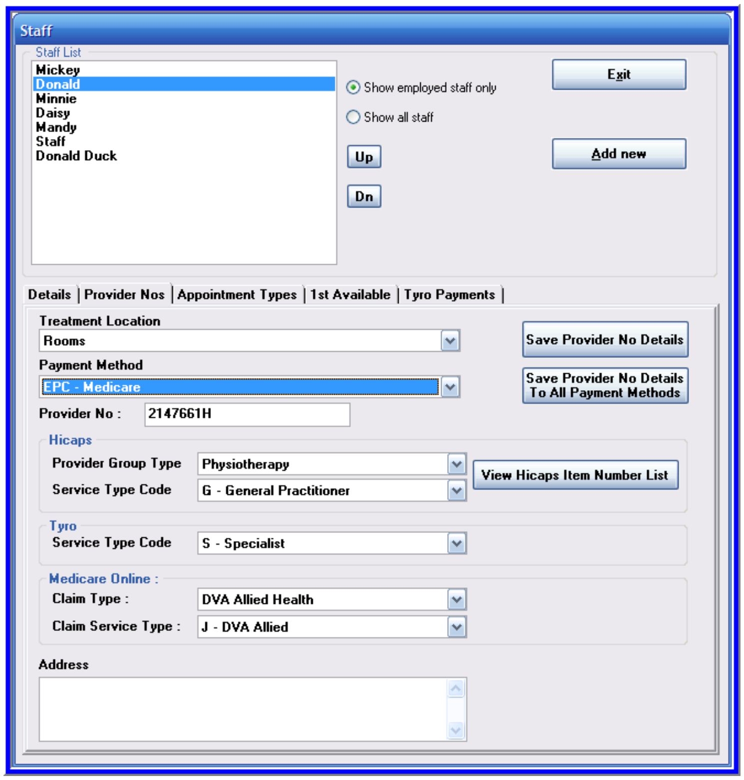


- Go to Setup
- Staff



- Select the staff member

- Click the Provider No tab.

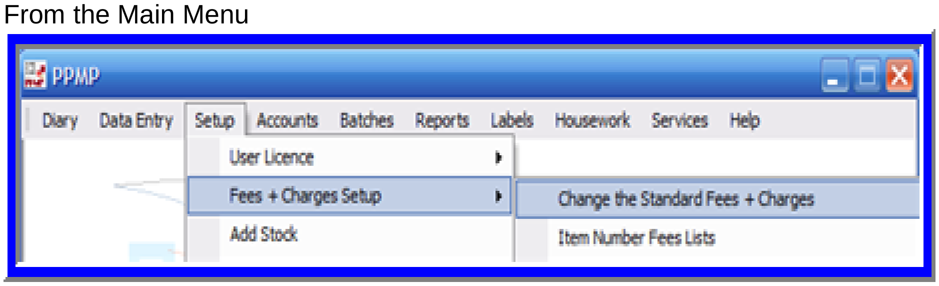


- Select your Medicare / EFT Payment Method
- Select the Service Type Code for TYRO
- Enter your provider number

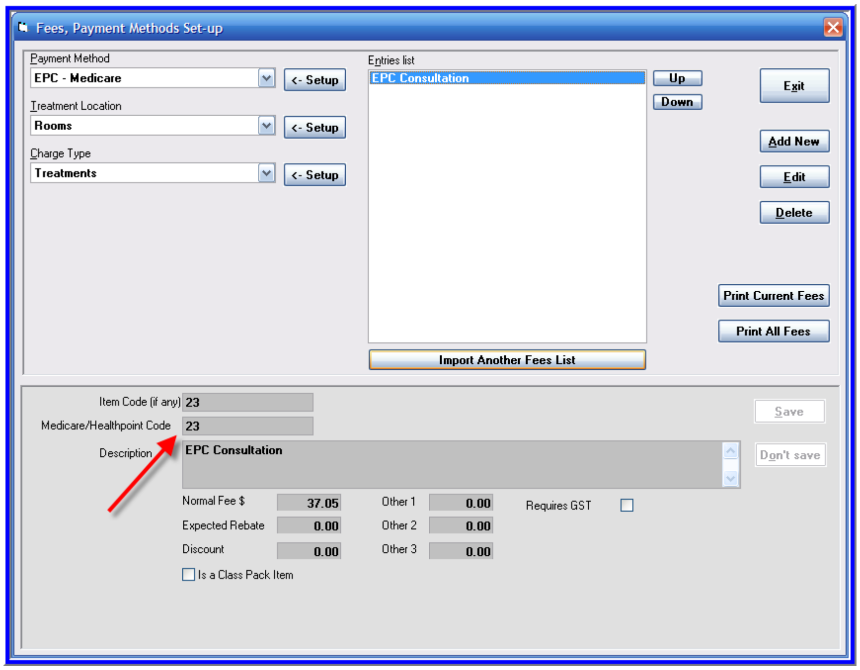
- Click Save Provider Details
- You must do this for **ALL** staff members

3.5 TYRO - Fees & charges Setup for EPC

From the Main Menu



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



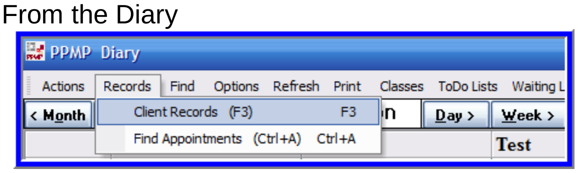
- Select the Medicare / EPC Payment Method
- Add or edit the Fees

  NB: Make sure the appropriate item code is entered into the Medicare/Healthpoint Code field.

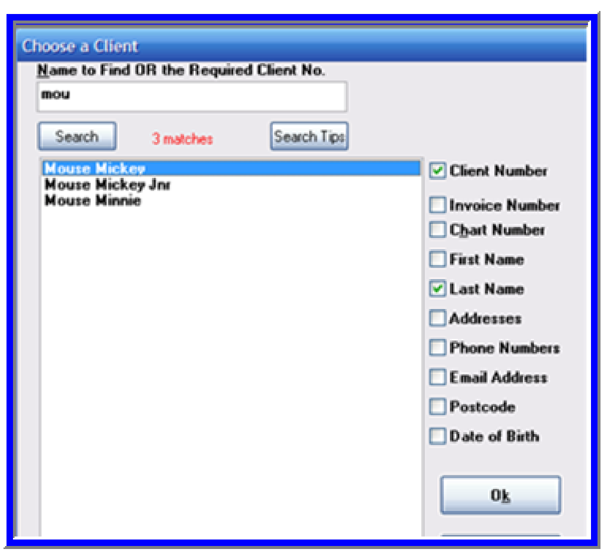
3.6 TYRO - Medicare/EPC episode

3.7 Client setup/create a new client record or setup

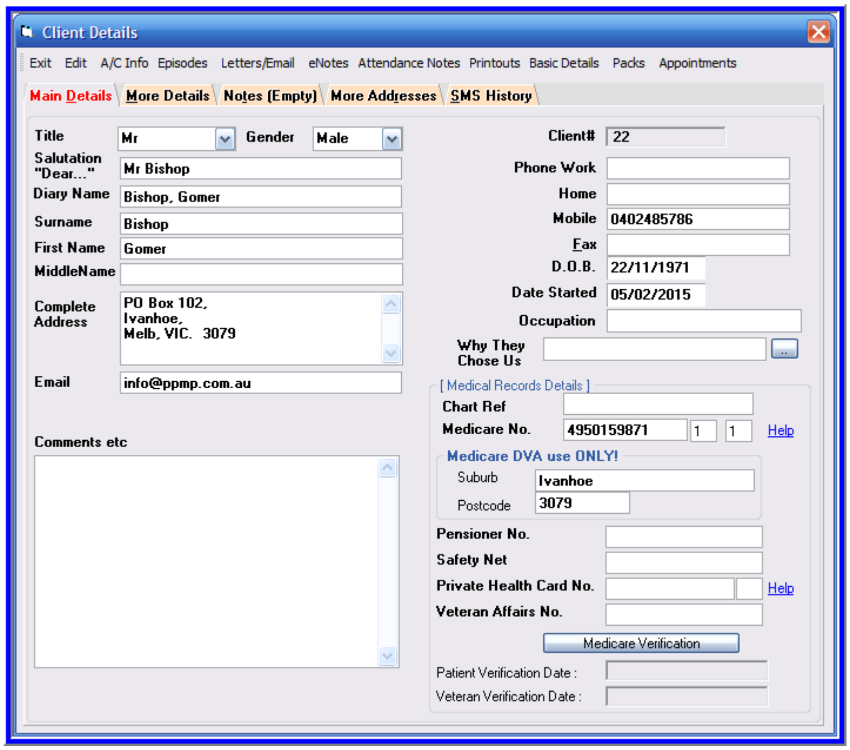
From the Diary



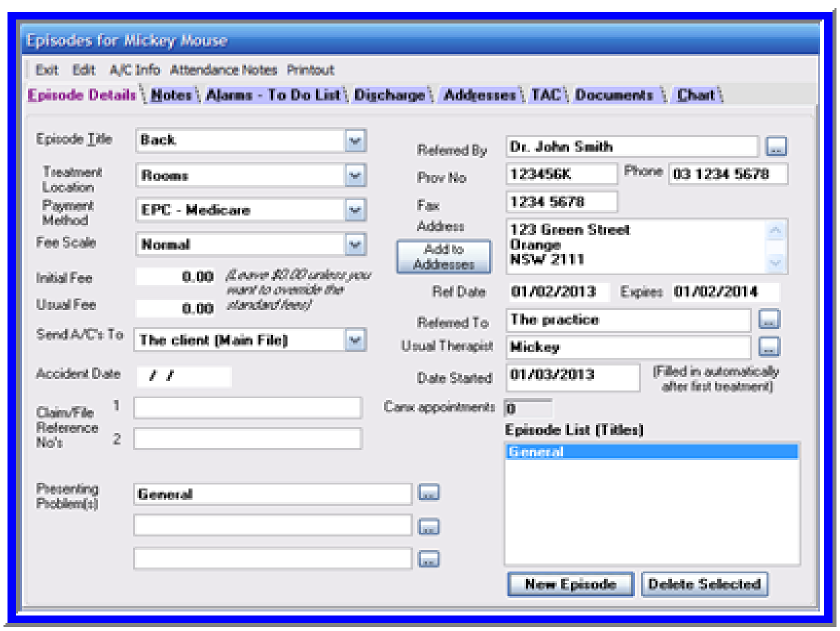
- Go to Records
- Client Records



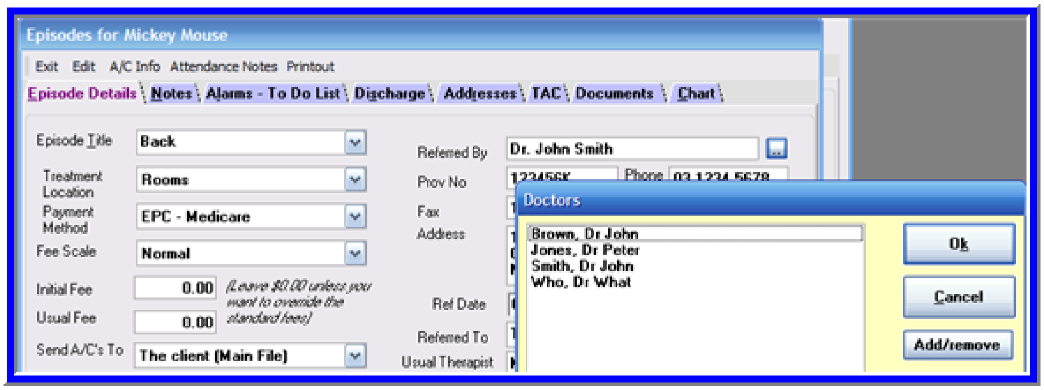
- Search for the client name or add a new client.



- 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**



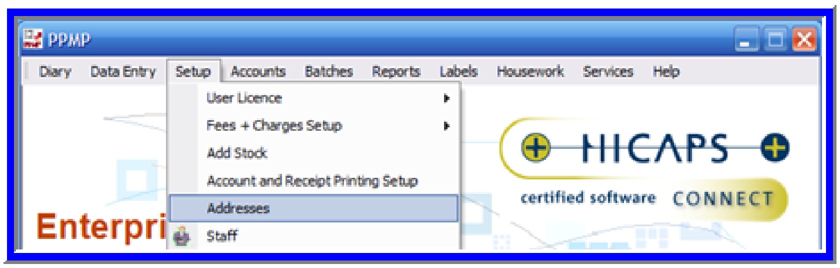
- Fill in ALL the episode details
- Select the correct Payment Method
- Enter the referral details.



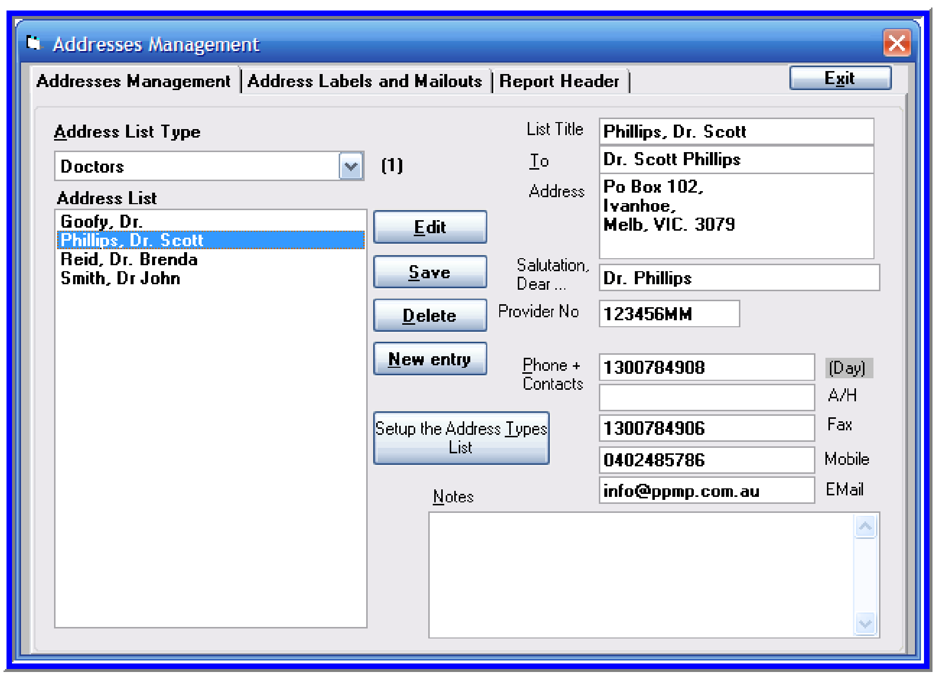
- Use the browse button to select a doctor from the list or
  Enter the information at the time.

3.8 Referring doctors setup

From the Main Menu



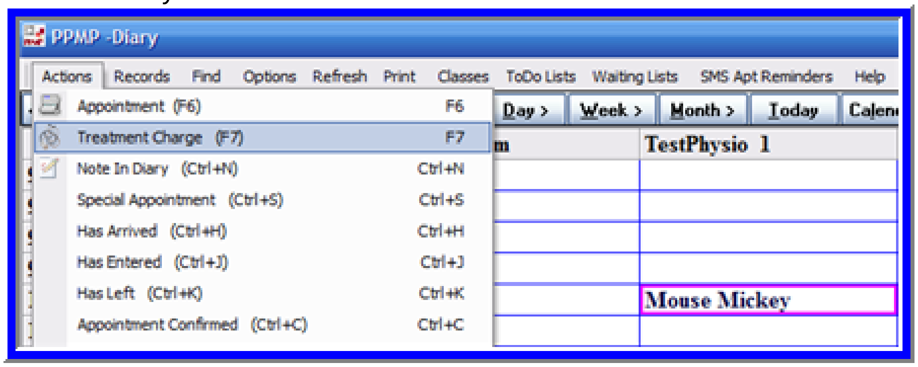
- Go to Setup
- Addresses



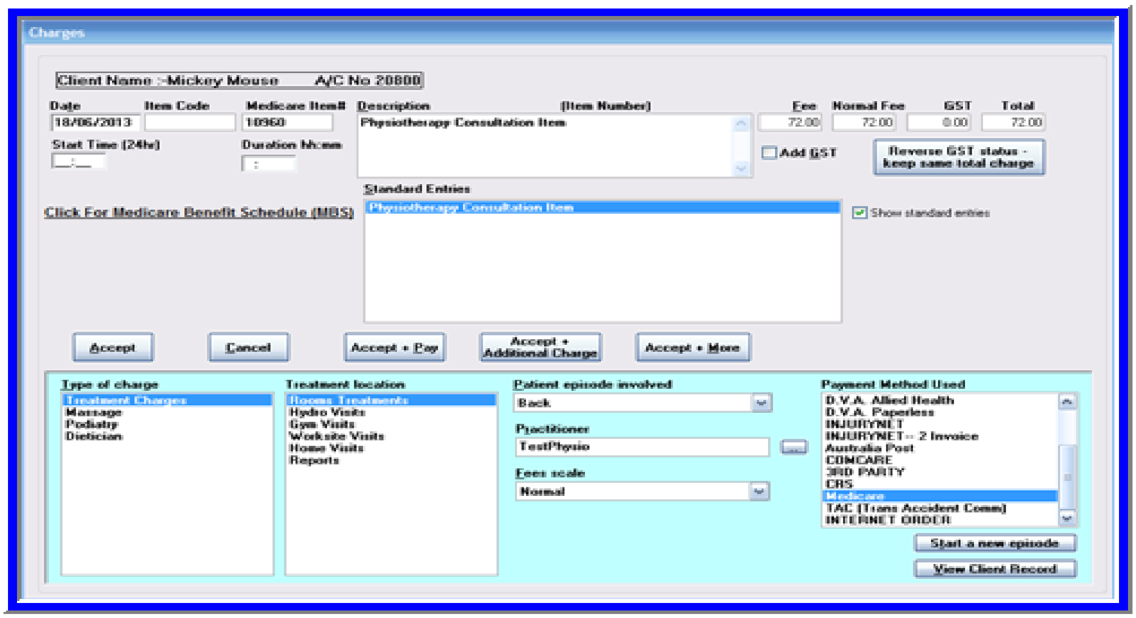
- Add or Edit the address list of the doctors
  (Including Doctor's provider numbers)

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

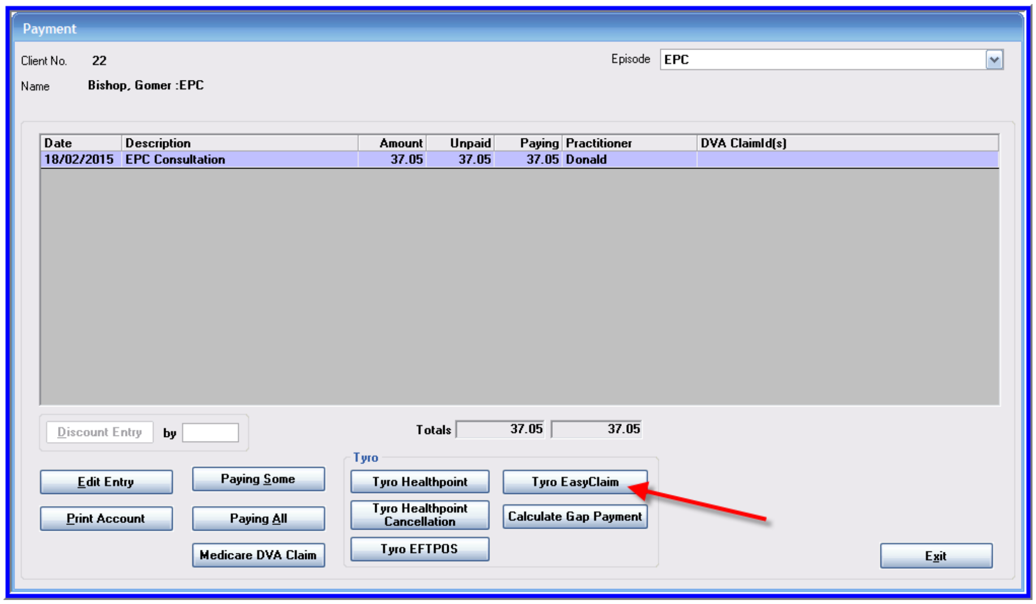
From the diary



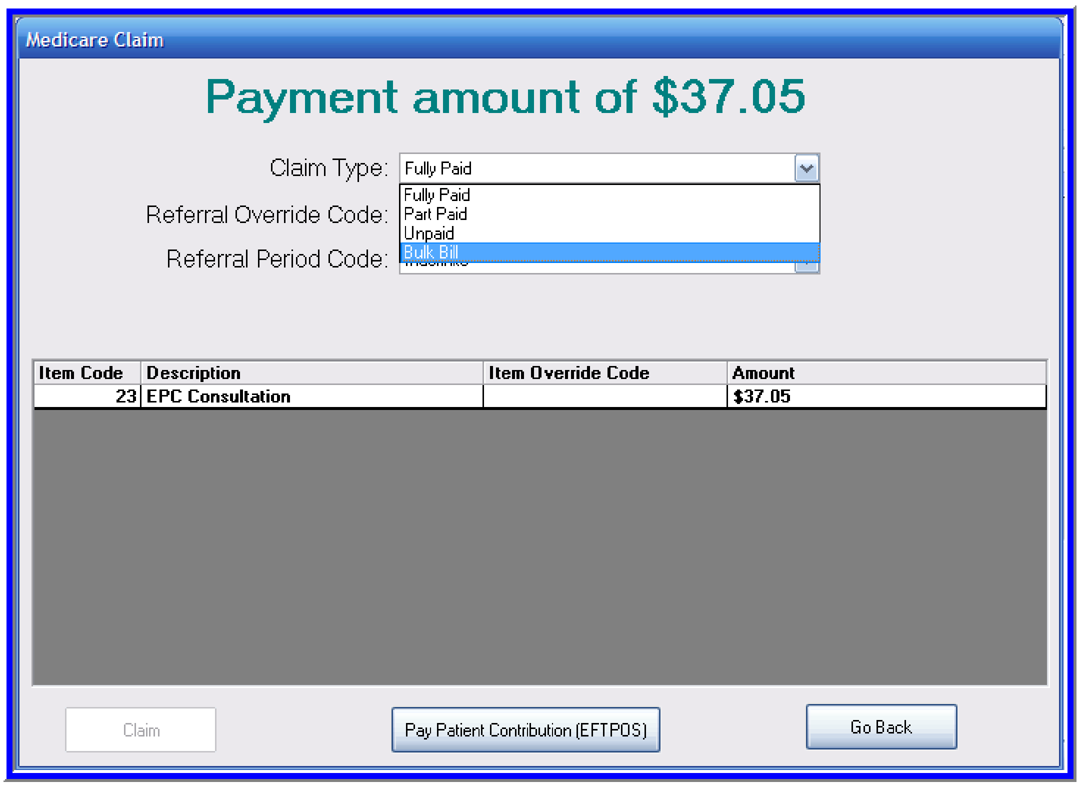
- Select Client
- Click Actions
- Select Treatment Charge



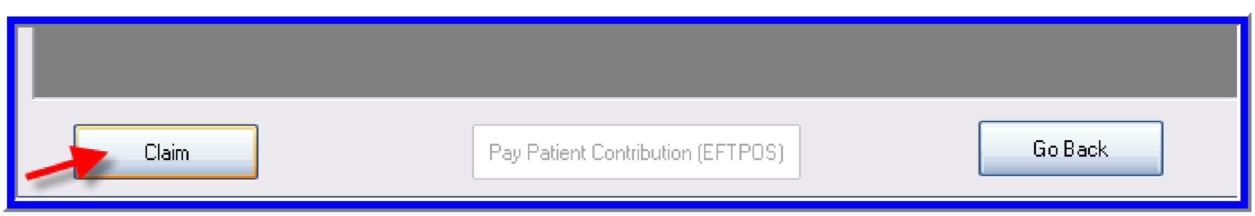
- Select the charge from the entires list
- Make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner.
- If the client details have been setup correctly, all information will be pre filled.
- Press Accept and Pay



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



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



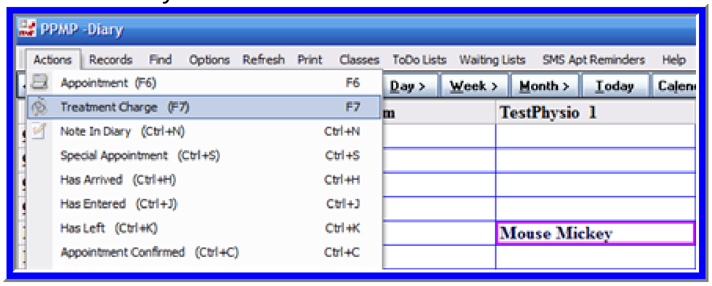
- Click Claim.

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

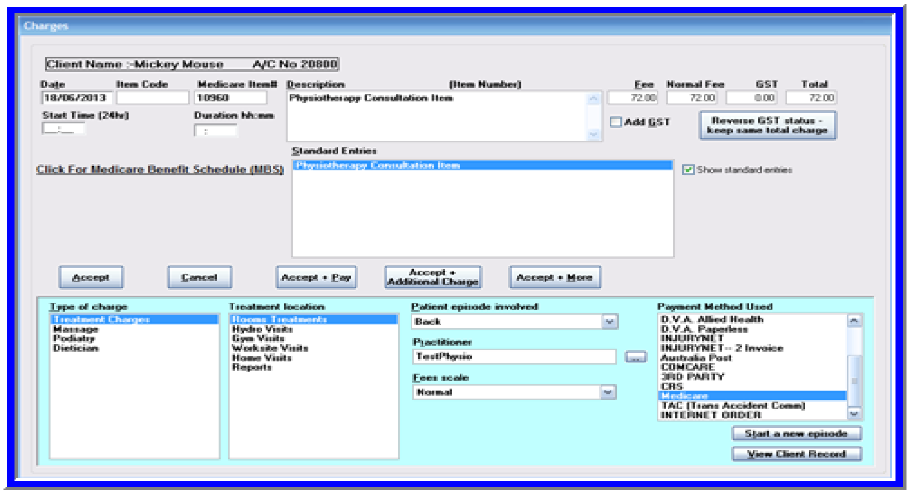
- Follow the prompts to process & print receipts

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

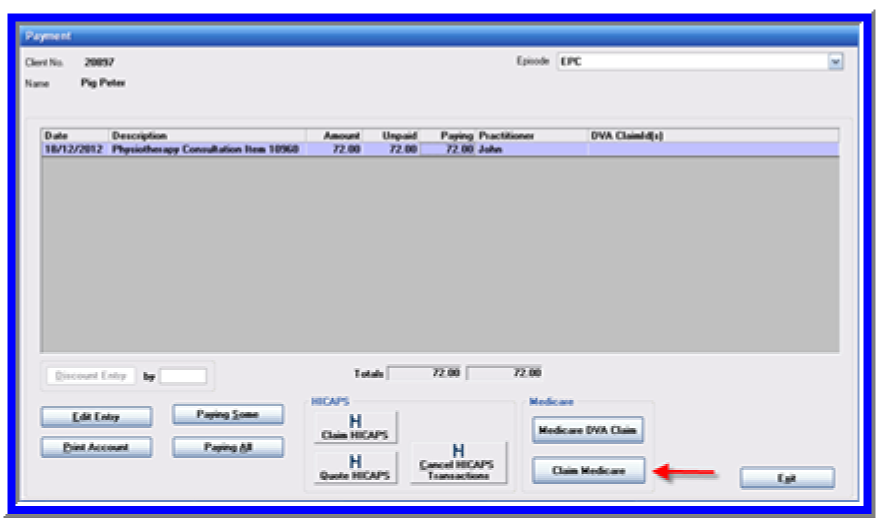
From the diary.



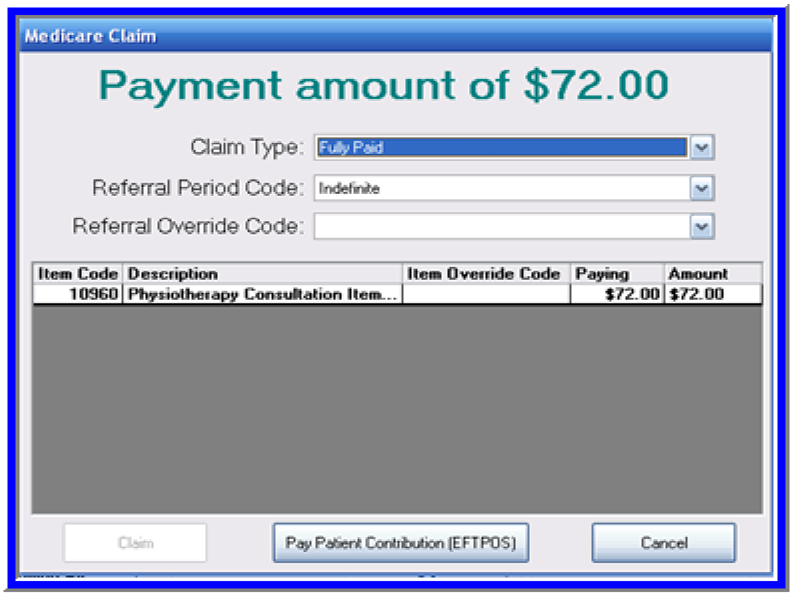
- Select the client
- Click Treatment Charge



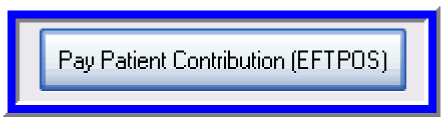
- Select the charge from the entires list, make sure all details are correct including Medicare Item No.
- Check the Episode, Payment Method & Practitioner. (If the client details have been setup correctly, all information will be pre filled)
- Press Accept & Pay the transaction



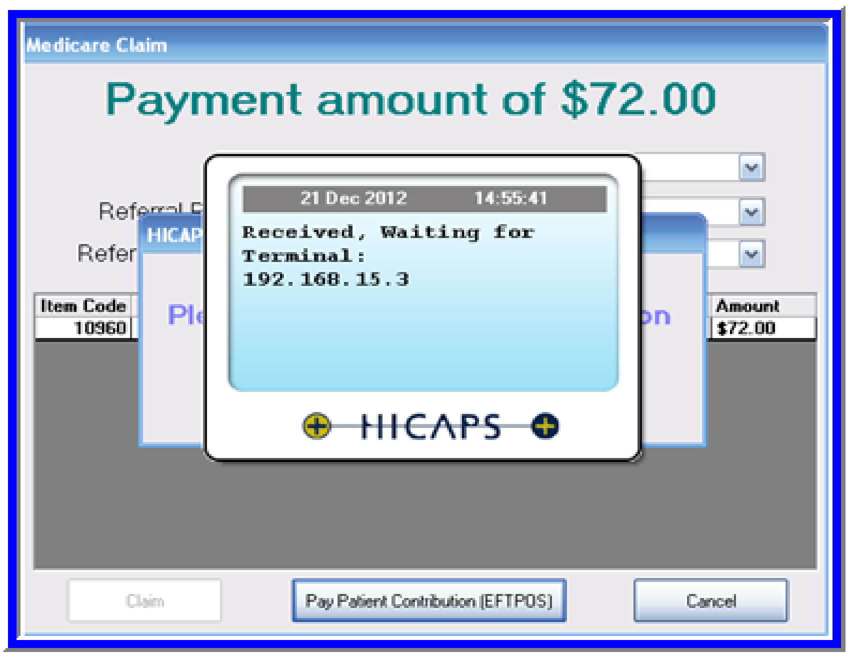
- Double click in the Paying field
- Click Claim Medicare Button.



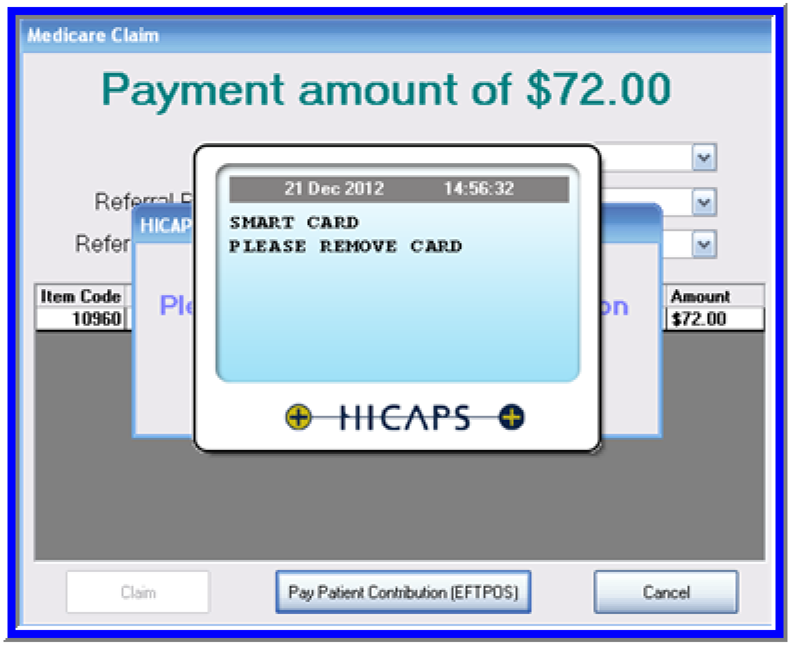
- Select the Claim Type



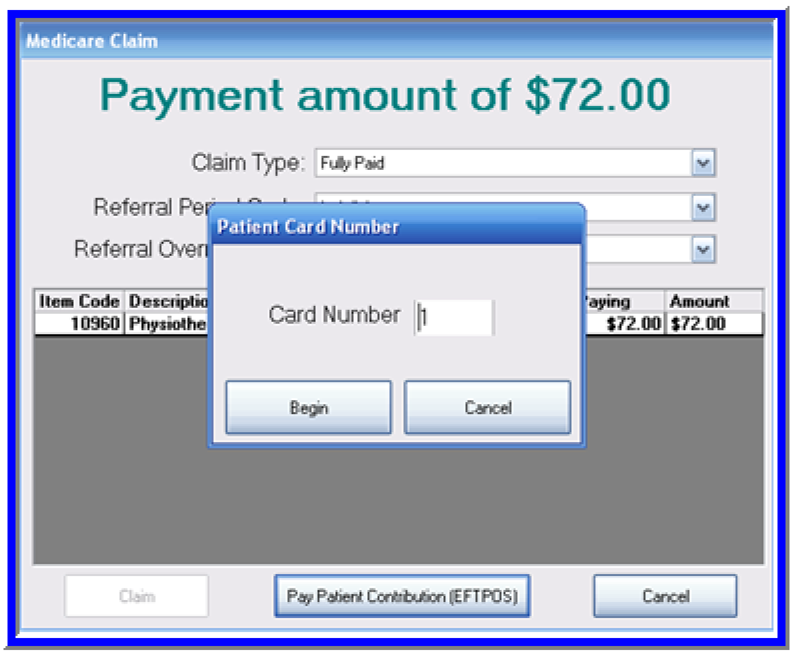
- Click Pay Patient Contribution (EFTPOS)
- If the Medicare Number is not filled out in the Patient Details, you are prompted to swipe/insert the card.



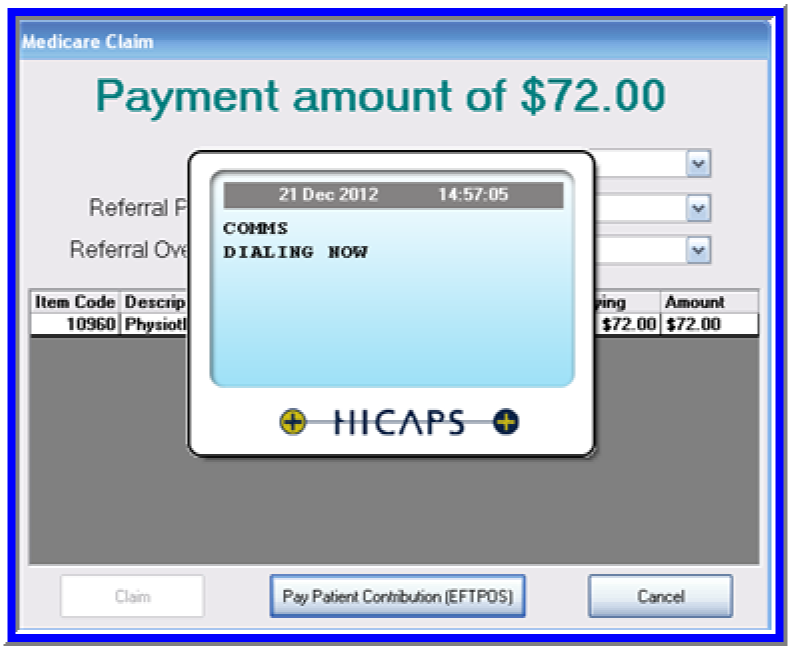
- Follow the prompts on the screen.



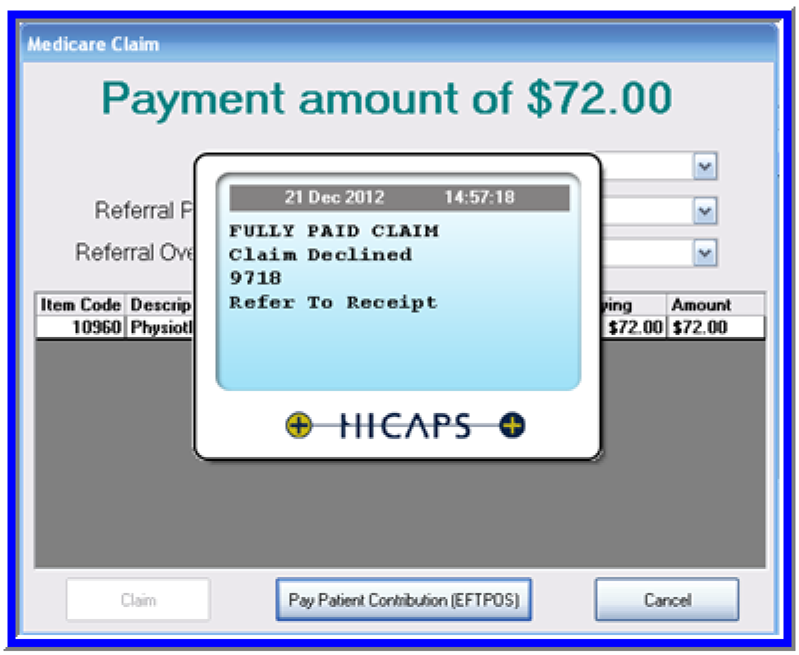
- Follow the prompts on the screen.



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



- Follow the prompts to complete the transaction



- 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®

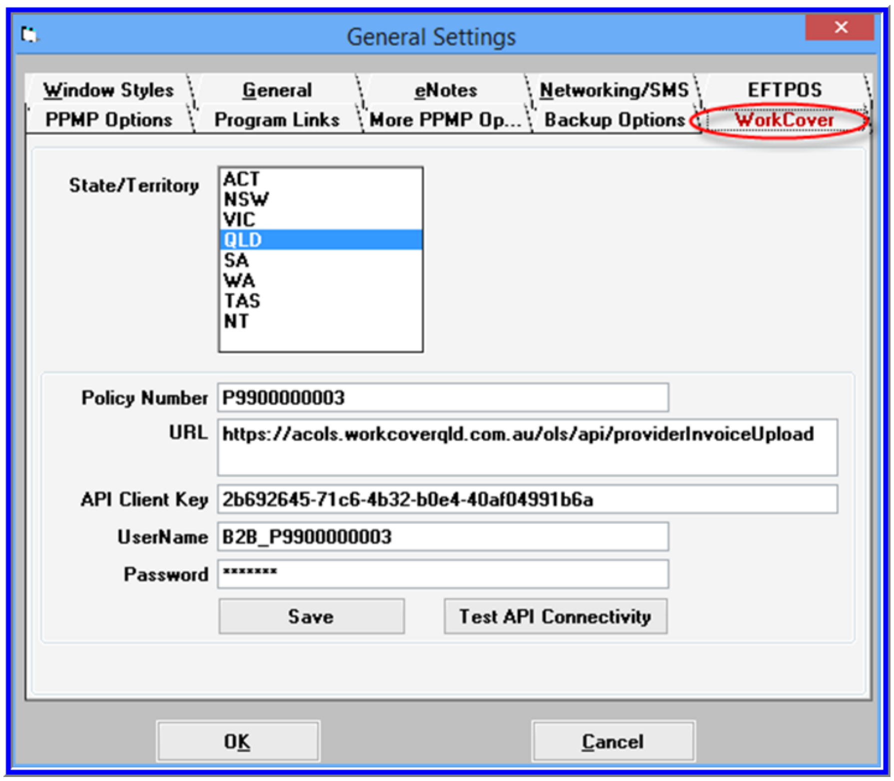
4.1 Step 1 - Register with Queensland WorkCover

- It is a simple set up process—just send an email to providers.providers@workcoverqld.com.au (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®

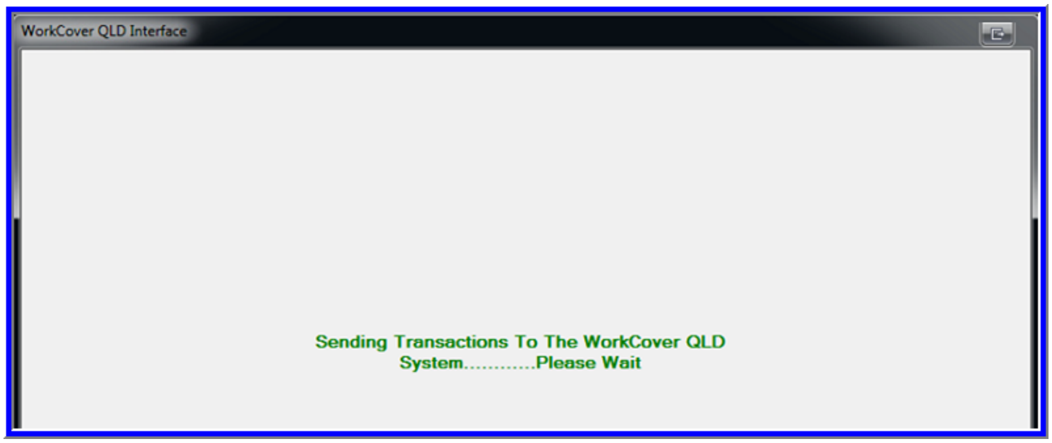
On the Main Screen of PPMP®

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

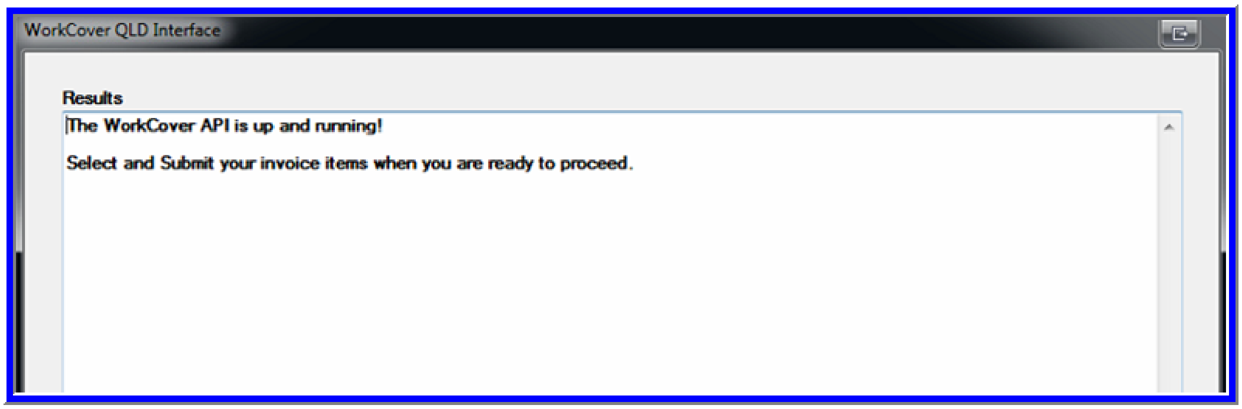


State/Territory: QLD
Policy Number: WorkCover Queensland Supplied
URL: PPMP® Supplied
API Client Key: PPMP® Supplied
User Name: WorkCover Queensland Supplied
Password: WorkCover Queensland Supplied

- Save the configuration & then press Test API Connectivity



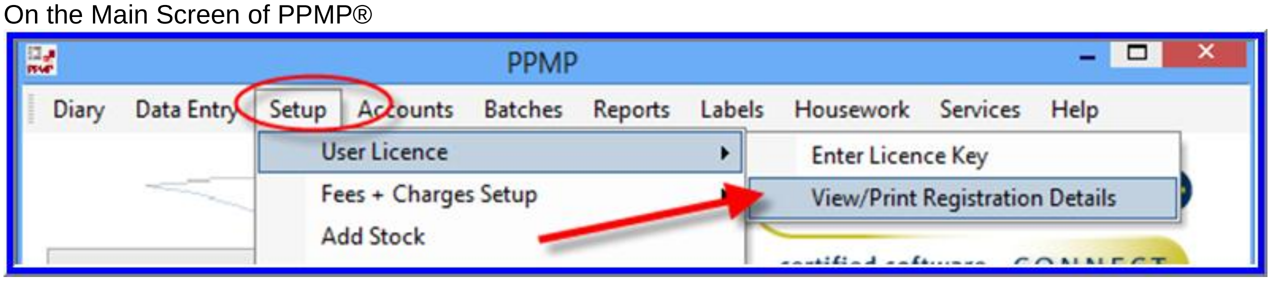
- Please wait while the system initiates a test.



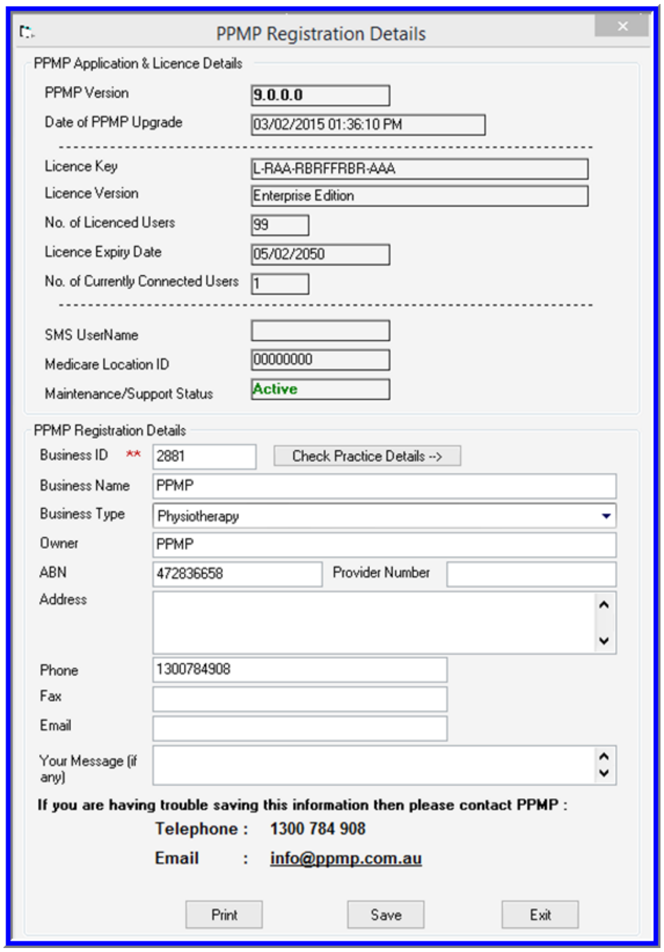
- The follow screen is displayed if successful. Press ok
- If you plan to lodge on more than one terminal, please repeat Step 2 only & install all three certificates.
- If you experience an error, please contact PPMP® Support for assistance.

4.3 Step 3 - Practice registration details

On the Main Screen of PPMP®



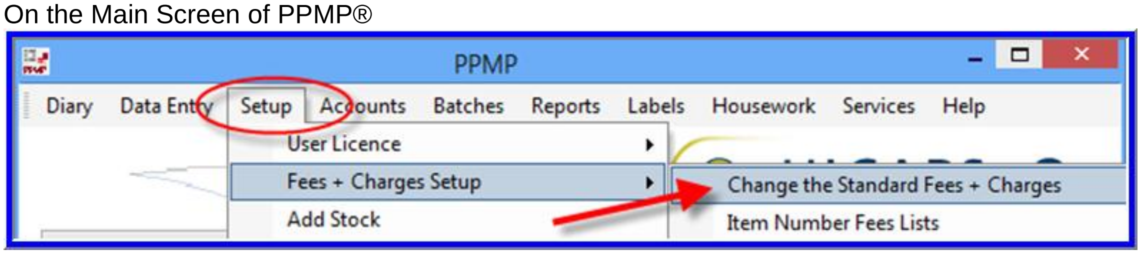
- Click Setup
- Select User License
- Select View/Print Registration Details.
- Complete the registration, including Business Name & ABN *See below*



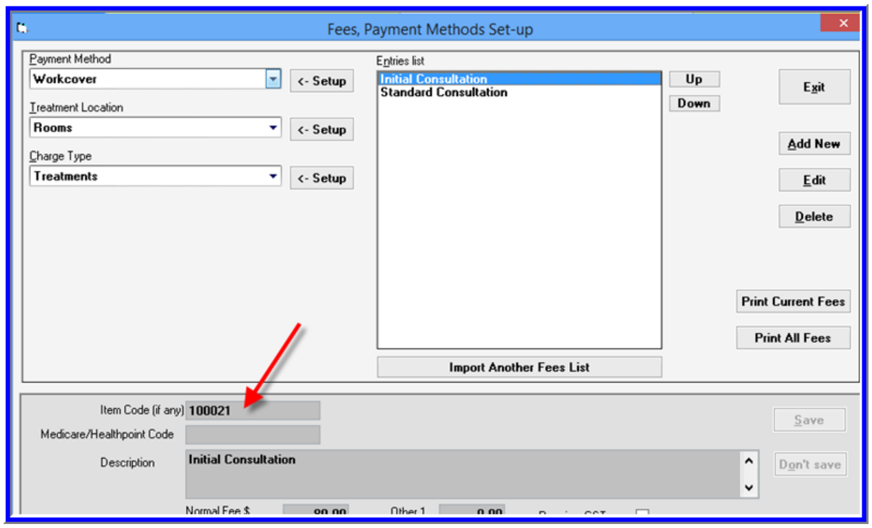
- Click Save

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®

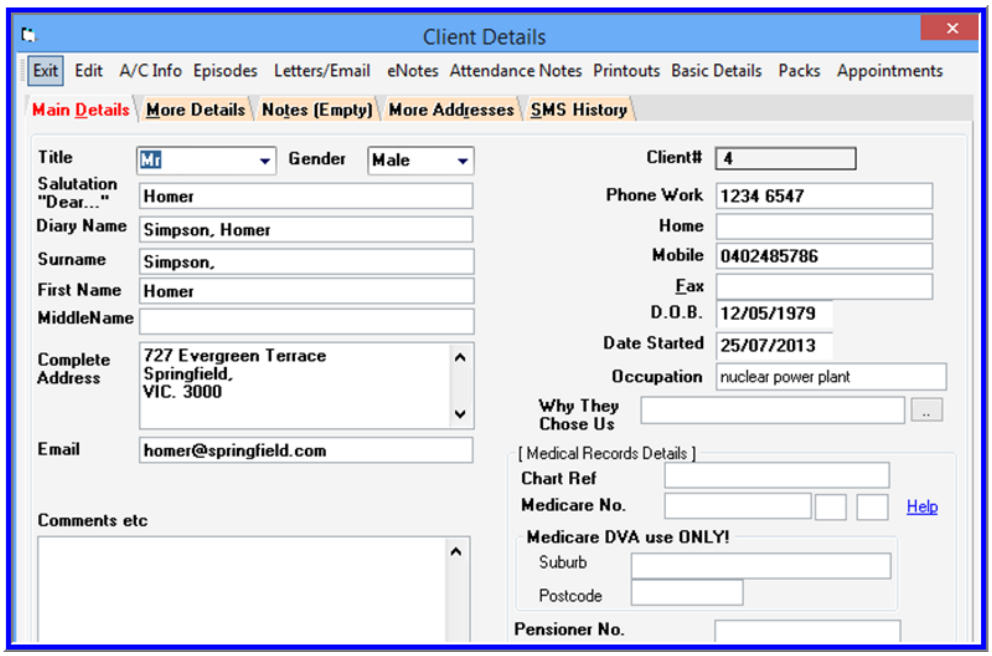


- Click Setup
- Fees & Charges Setup
- Change the Standard Fees & Charges

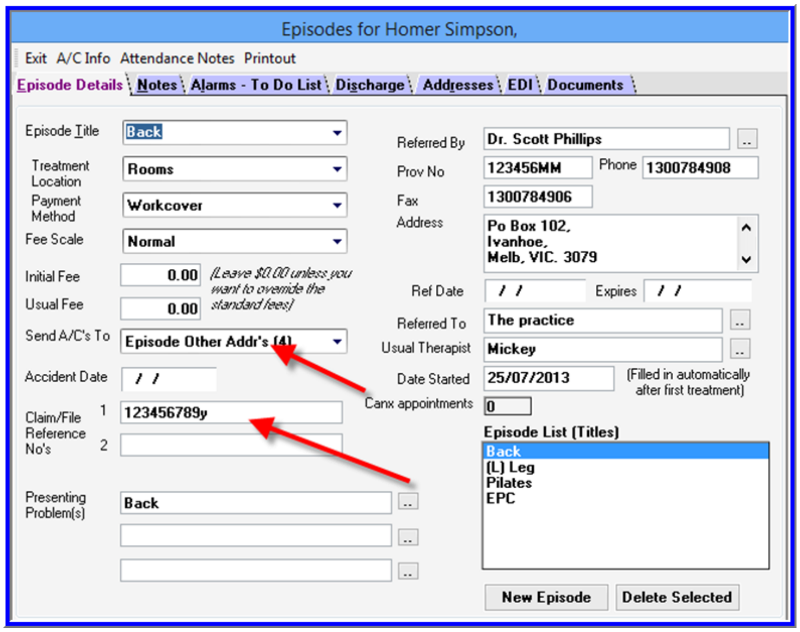


- Go to your Workcover Payment method and ensure the **Item Code** is entered for each individual charge
- Do the same for treatment locations and any other areas you have Workcover charges entered
- Click Save

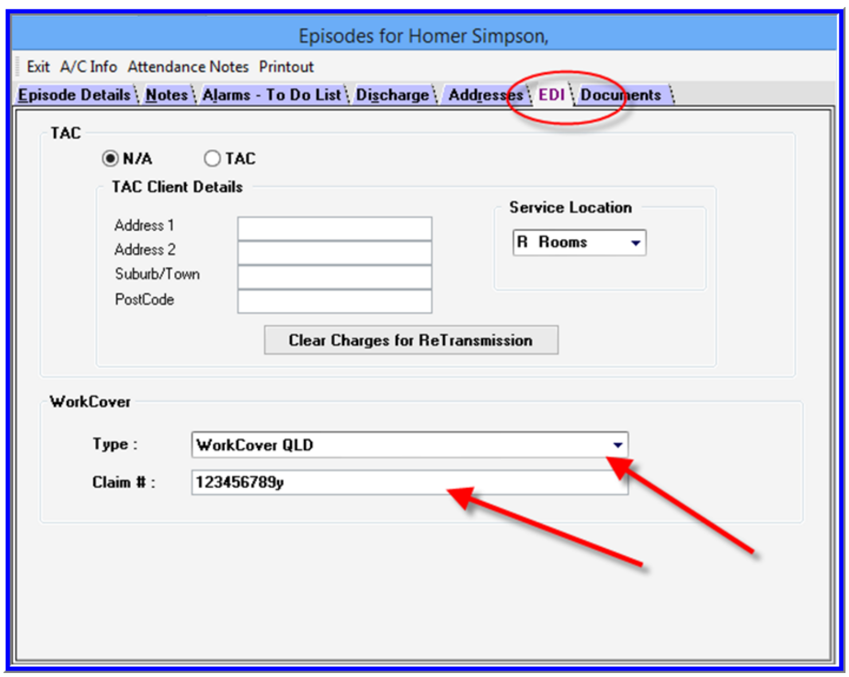
4.5 Step 5 - Client record setup / Episode setup



- Open the Client record



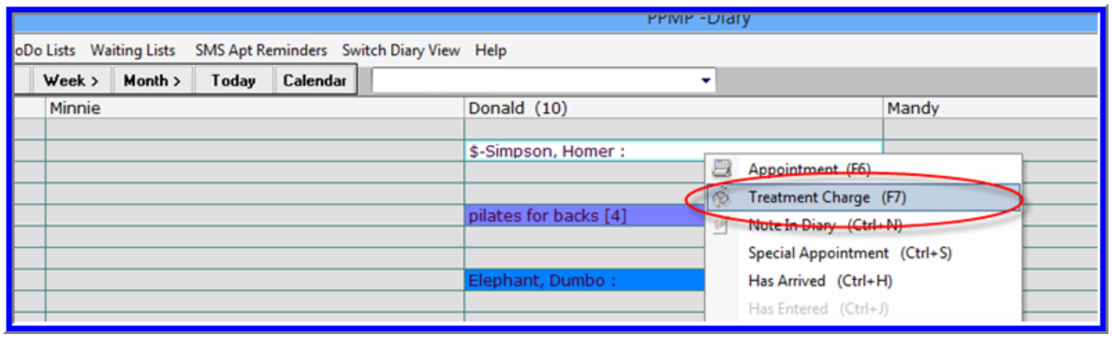
- Fill in the episode details
- Change the Send A/C's to **Episode Other Addr's (4)**
- Enter the claim number in Claim/File Reference No's 1



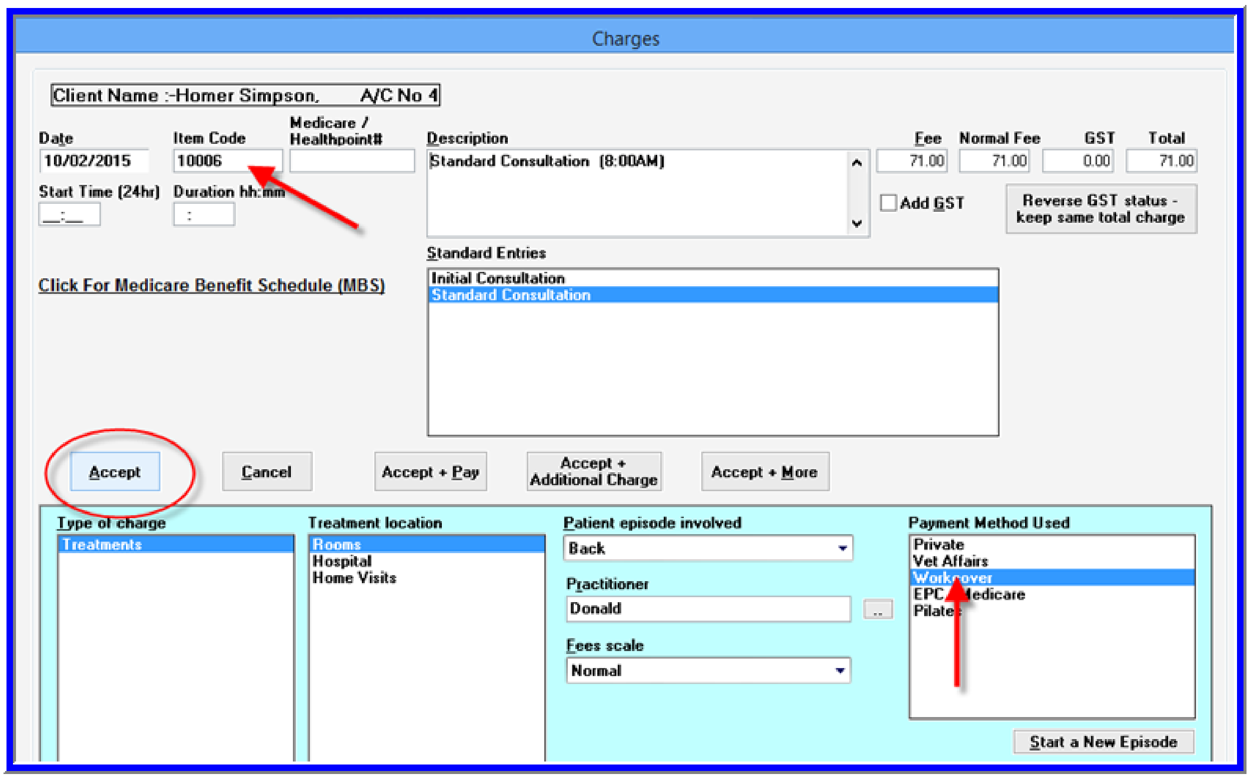
- Click the EDI Tab
- For **Type** Select WorkCover QLD
- Enter the Claim number
- Click exit
- Save the changes

4.6 Billing a patient

Click HERE to watch videook



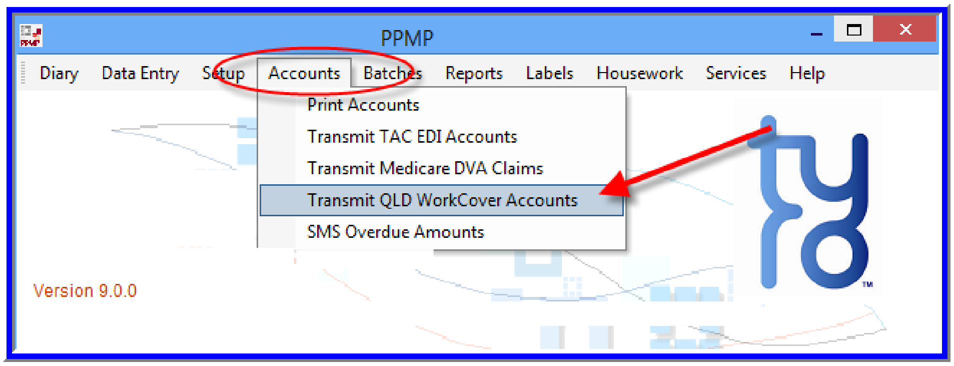
- Select the Client on the Diary
- Click Actions
- Select Treatment charge



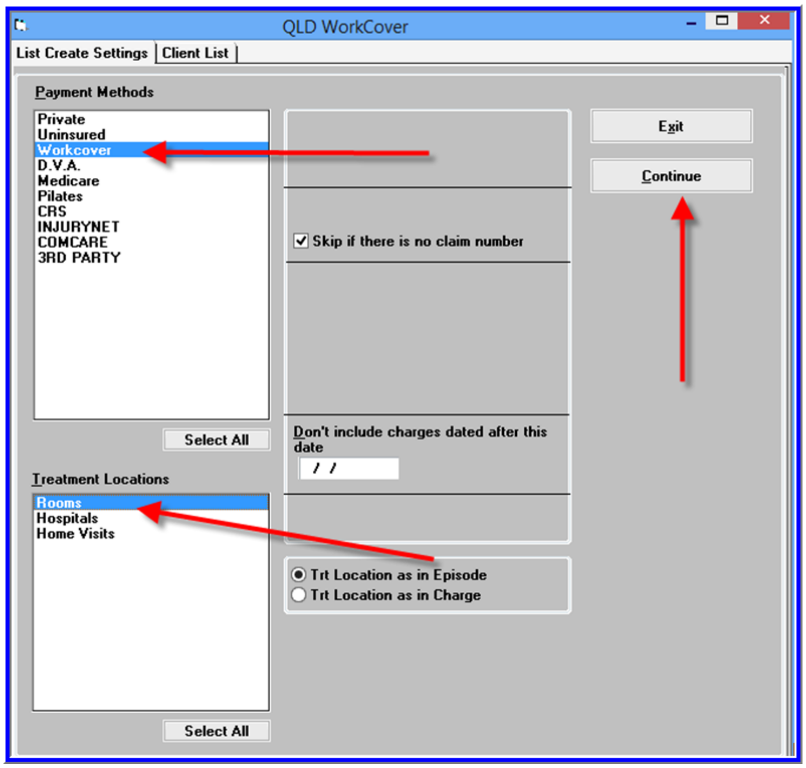
- Select the correct charge
- Ensure all fields are correct
- Click Accept

4.7 Submitting a claim

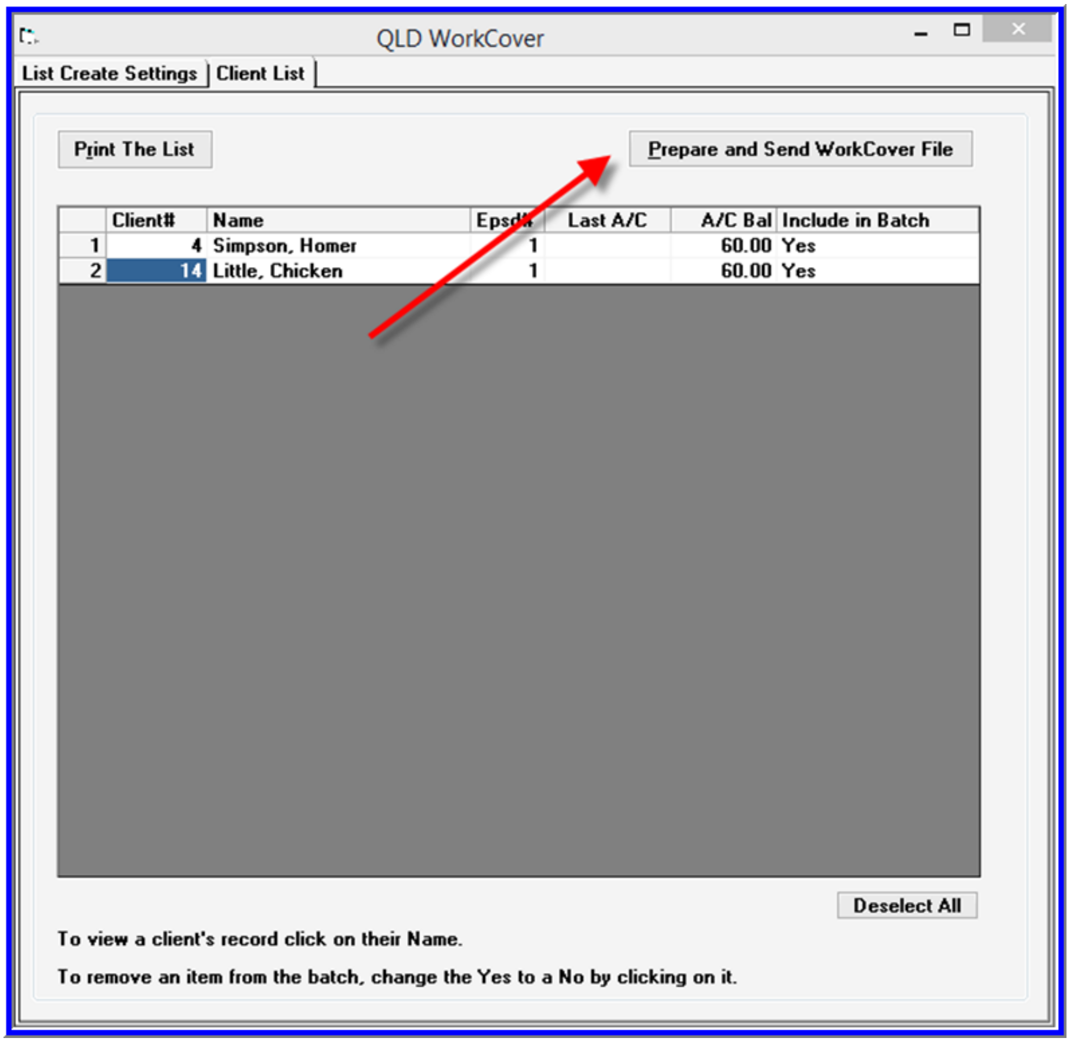
On the Main Screen of PPMP®



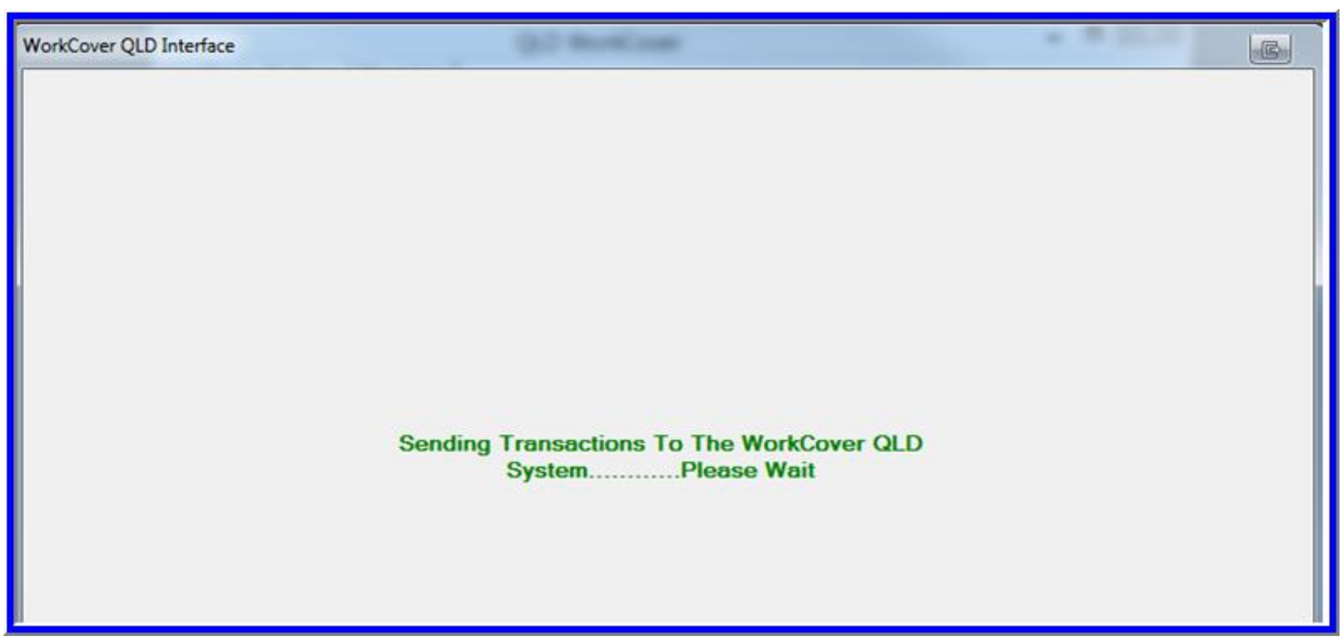
- Go to Accounts
- Transmit QLD WorkCover Accounts

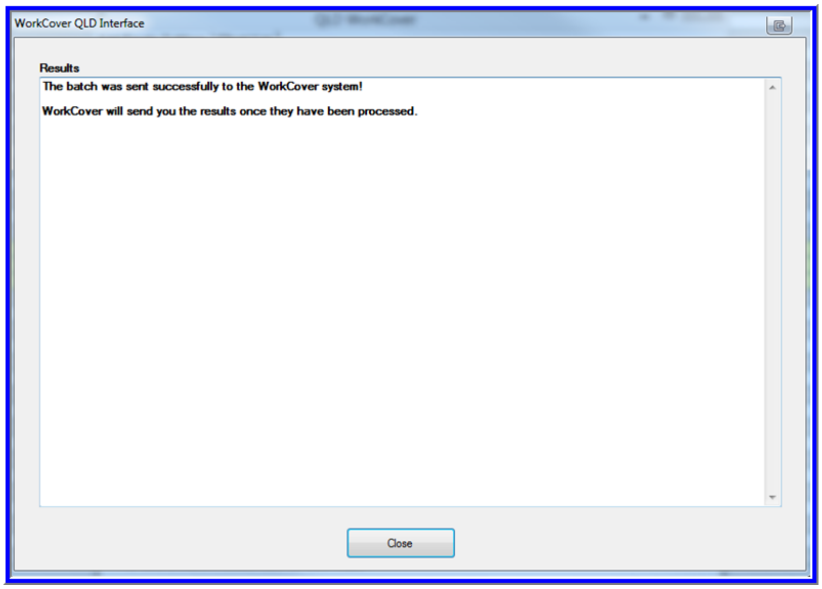


- Select all Payment Methods and Treatment Locations with WorkCover charges
- Click Continue



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

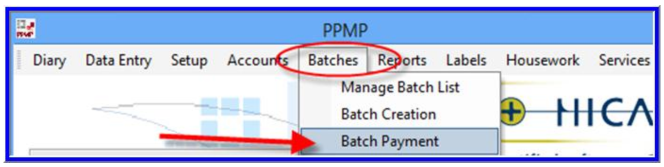




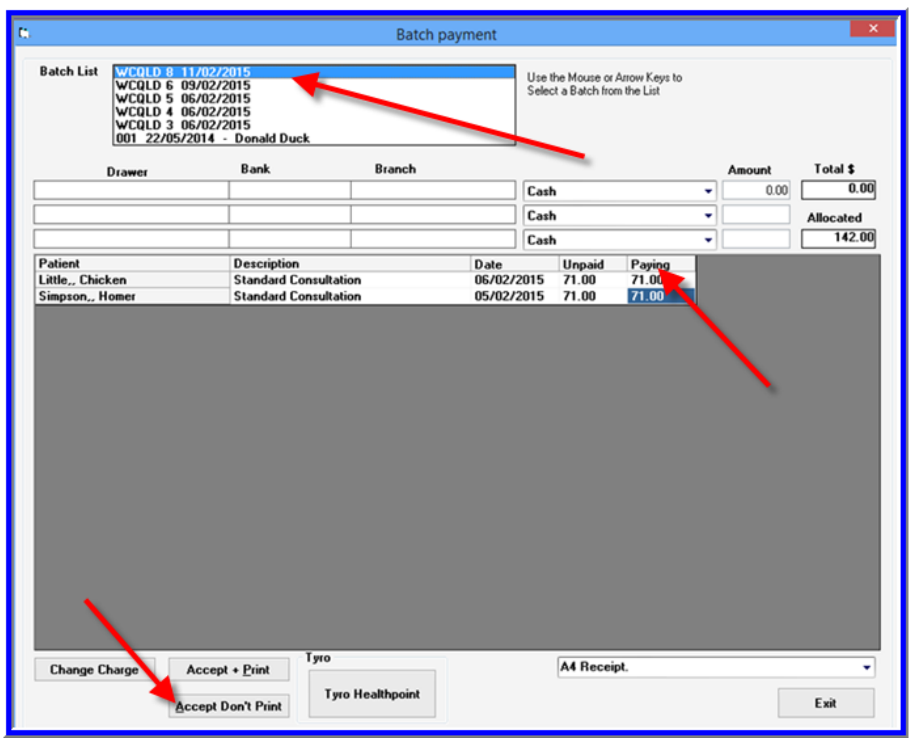
- Once transactions have been submitted the results screen appear confirming successful transmission

4.8 Recording a payment

On the Main Screen of PPMP®



- Select Batches
- Select Batch Payment



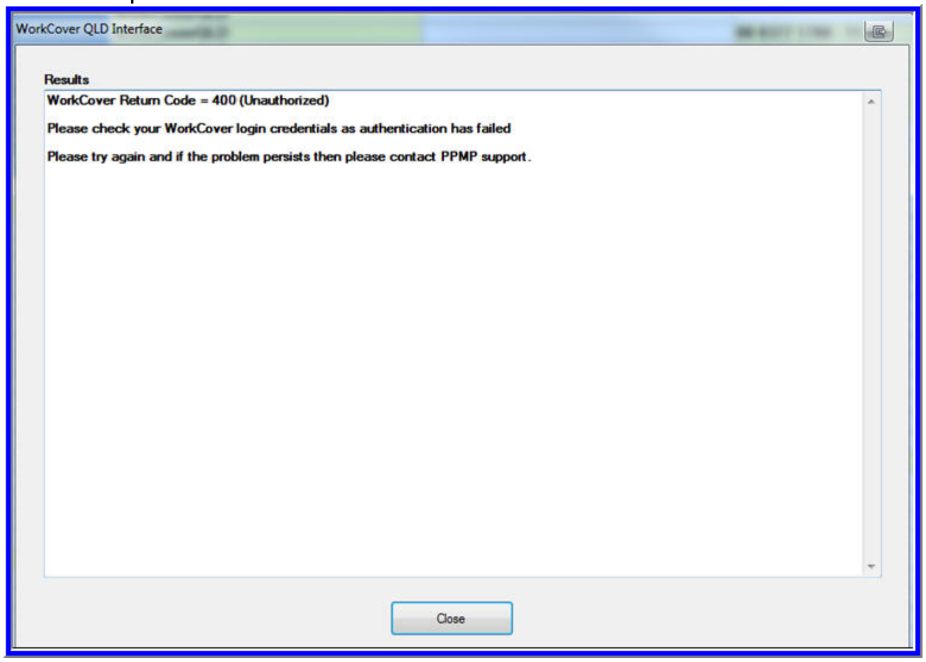
- Select the Batch you wish to pay
- Allocate the payments that you have been advised of
- Click Accept Don't Print

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)

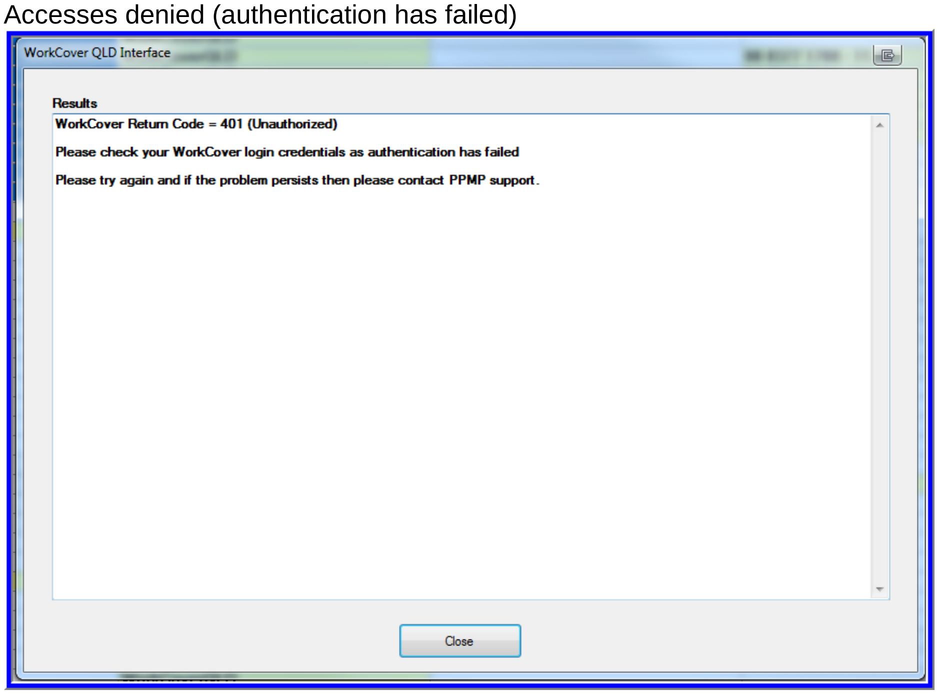
Client has provided malformed JSON or XML



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)

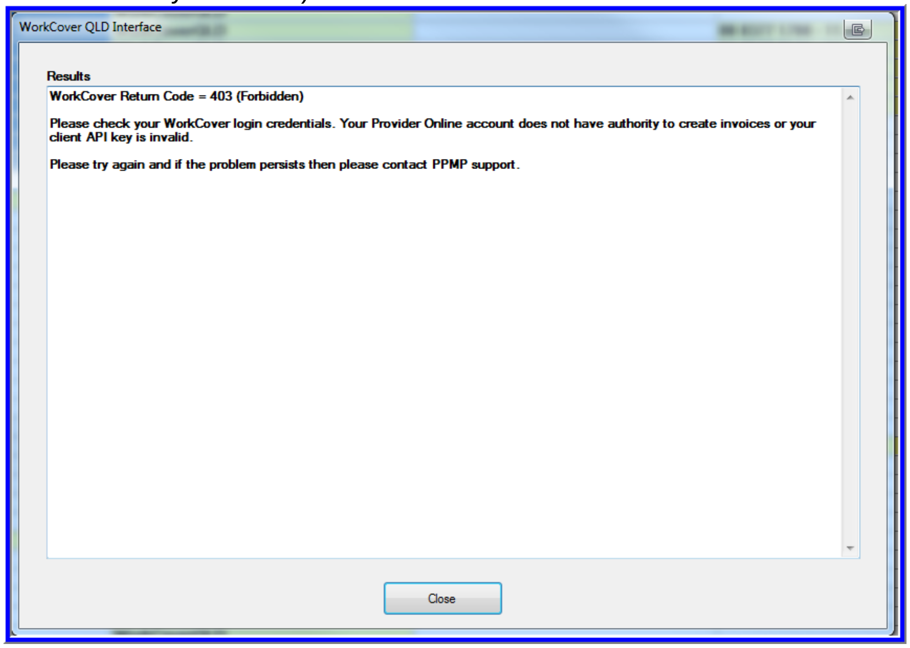
Accesses denied (authentication has failed)



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)

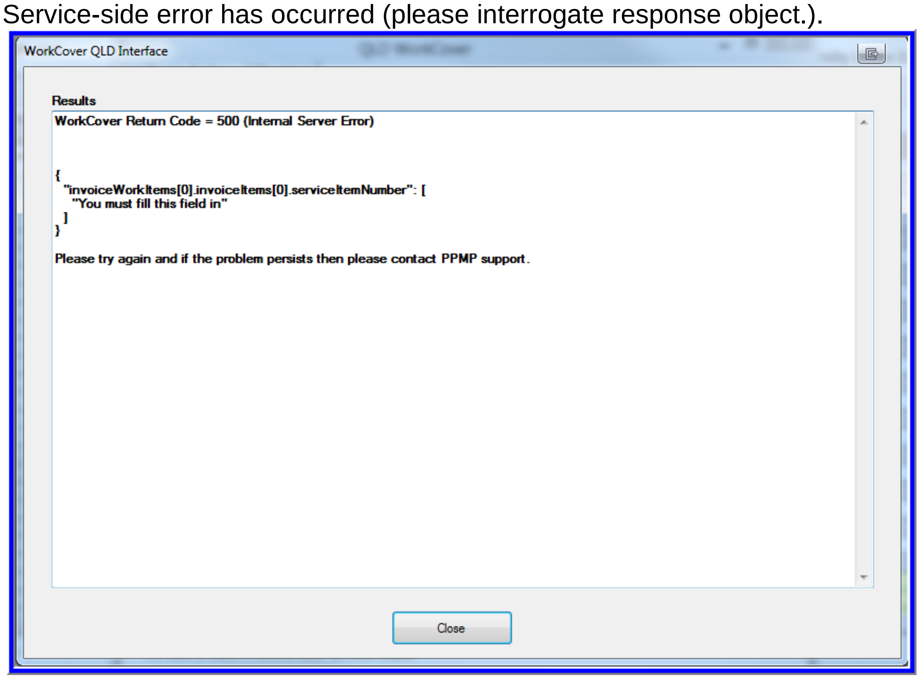
Accesses denied (authentication has failed – your Provider Online account does not have authority to create invoices, or the vendor API key is invalid.).



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)

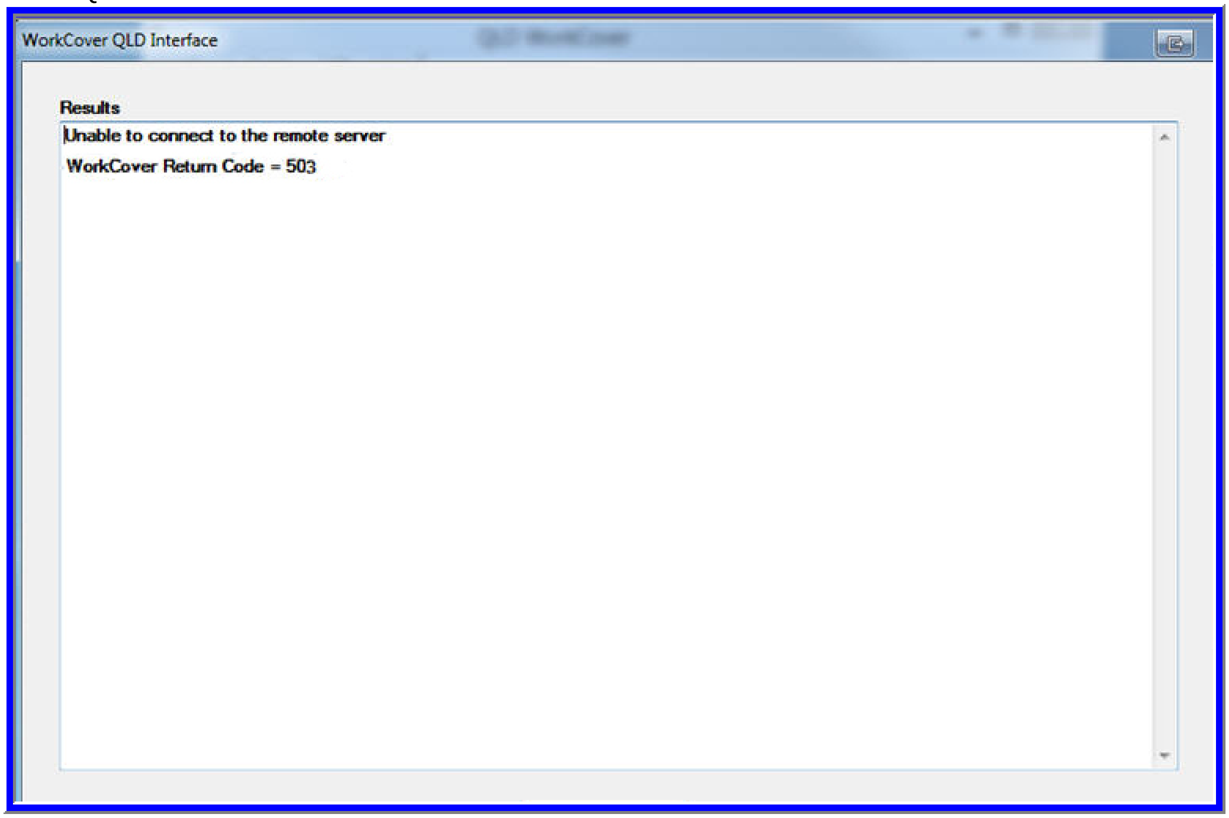
A Service-side error has occurred (please interrogate response object.).



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.

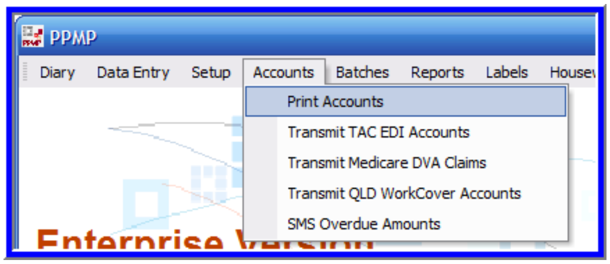
Section 3 – PPMP® user manual

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.

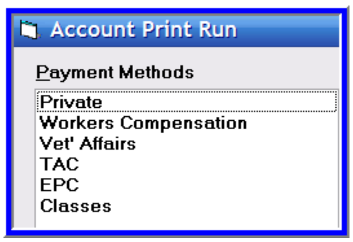
5.1 Print accounts – Stage 1

On the Main Menu PPMP®

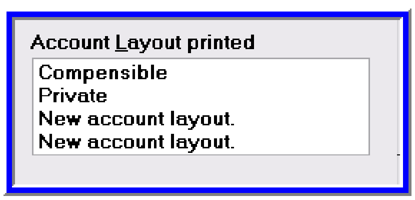


- Click Accounts
- Click Print Accounts

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

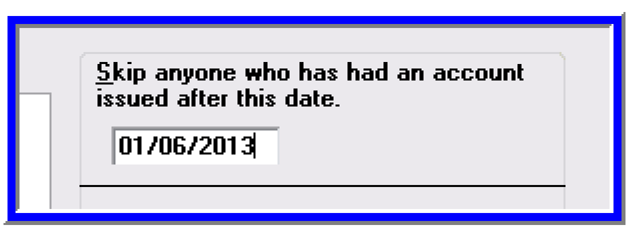


- Select the payment methods to be included in this run.



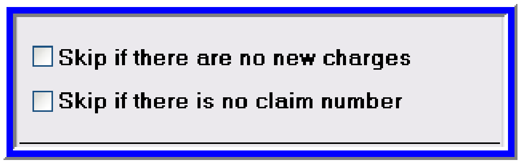
- Choose what account layout you want used.
- Only one account style can be chosen at a time

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



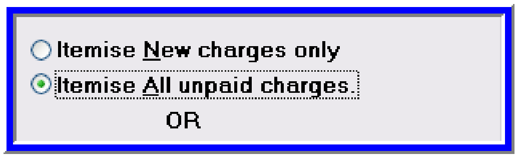
- The cut-off date will automatically load a one-week cut-off (skip anyone who received an account in the last week.)

5.2 Controlling which charges are itemized



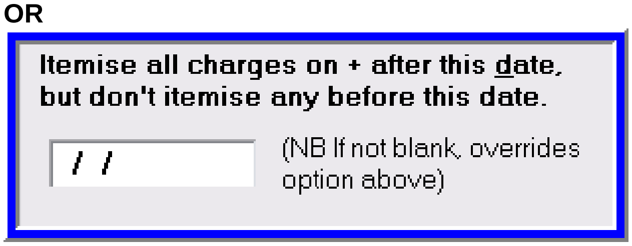
- You can choose to skip patients if there are no new charges or no claim number

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

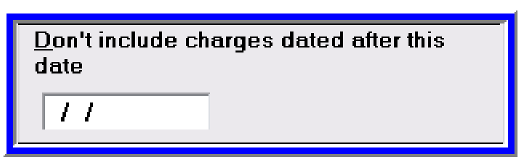


- Itemise New Charges only – your account will print a Balance brought forward from the most recent previous account, and then any new charges are itemised.
- Itemise All Unpaid Charges - your account will print all unpaid charges.

OR



- Itemise all charges 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.



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

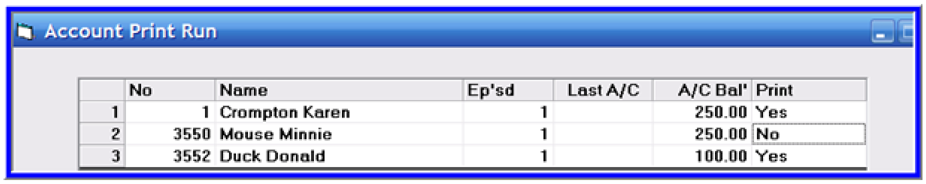
- Choose whether or not to Print the Balance Bought Forward

- 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.

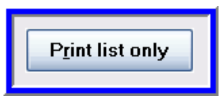
A list is displayed on screen. You can then proceed to do the following: -


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

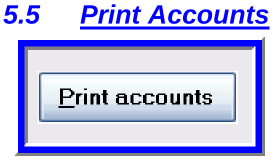
At the bottom of the screen you will see

- Wait 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.

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

- 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').

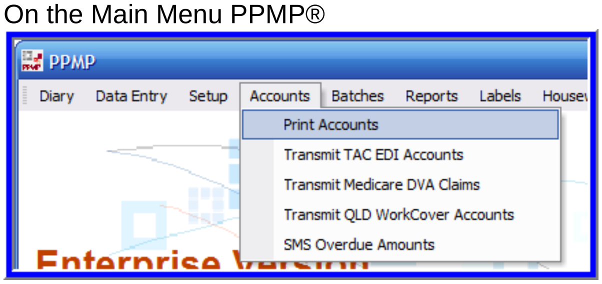
5.7 Change the print delay settings during printing.

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

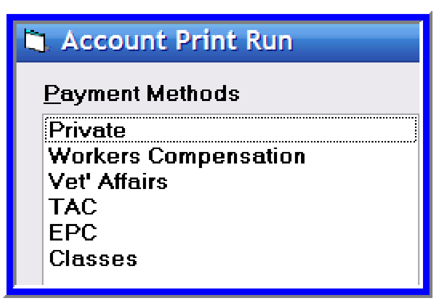
5.9 Email accounts – Stage 1

On the Main Menu PPMP®

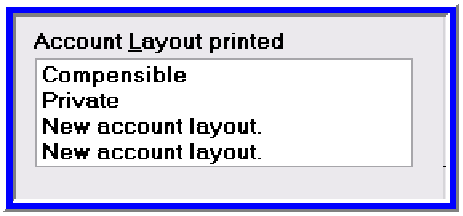


- Click Accounts
- Click Print Accounts

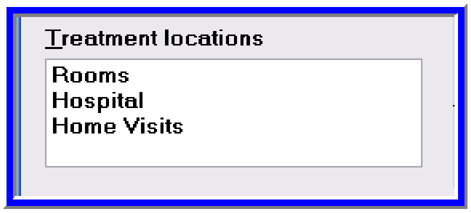
Supply the settings that will be used to decide who should receive an account.



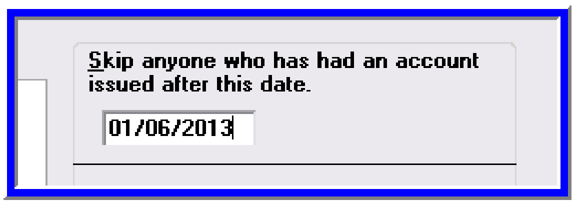
- Select the payment methods to be included in this run.



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

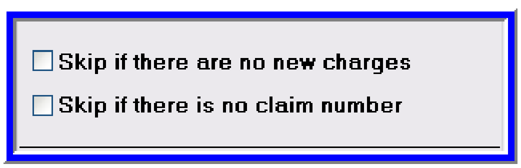


- No need to choose a Treatment Location (all will be included)



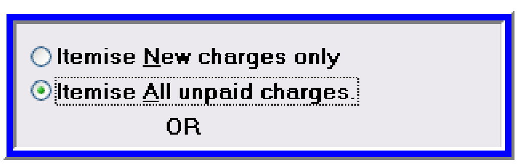
- The cut-off date will automatically load a one-week cut-off (skip anyone who received an account in the last week.)

Controlling which charges are itemized



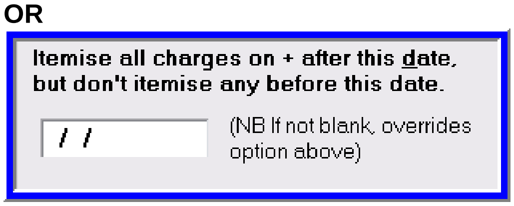
- You can choose to skip patients if there are no new charges or no claim number

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

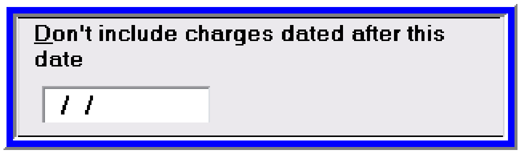


- Itemise New Charges only – your account will print a Balance brought forward from the most recent previous account, and then any new charges are itemised.
- Itemise All Unpaid Charges - your account will print all unpaid charges.

OR



- Itemise all charges 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.



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

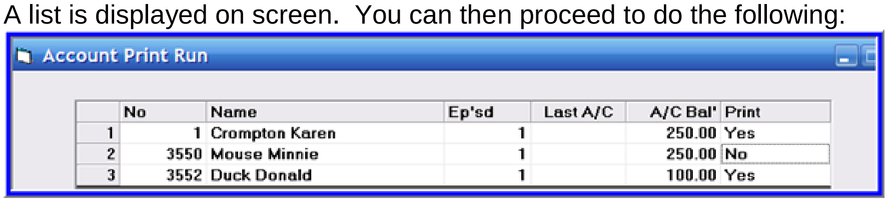
- Choose whether or not to Print the Balance Bought Forward

- 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:

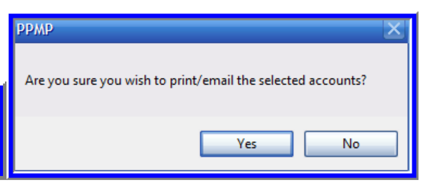


	No	Name	Ep'sd	Last A/C	A/C Bal'	Print
1	1	Crompton Karen	1		250.00	Yes
2	3550	Mouse Minnie	1		250.00	No
3	3552	Duck Donald	1		100.00	Yes

- 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.
- Press the 'Email accounts' button to email the accounts

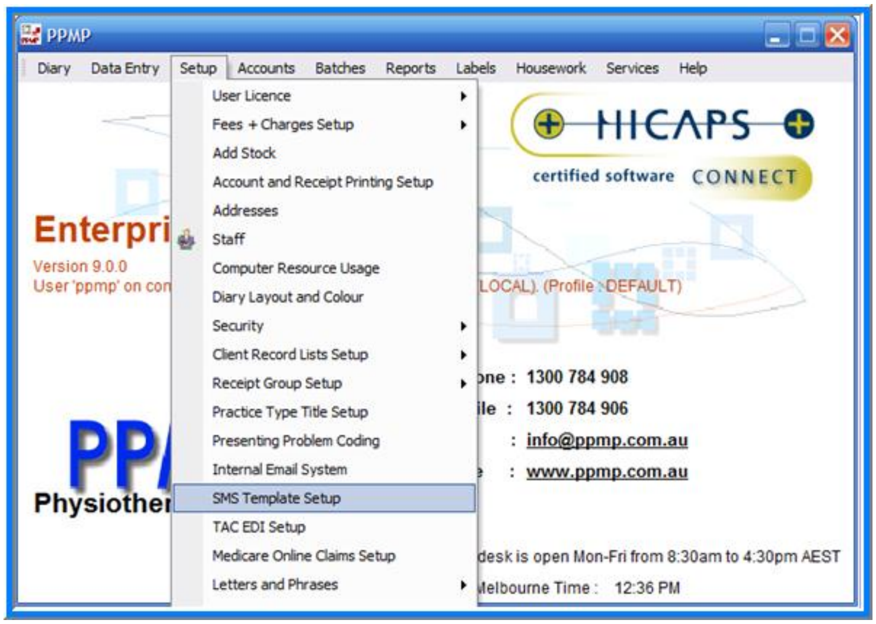


- Click Yes to send the Accounts via email

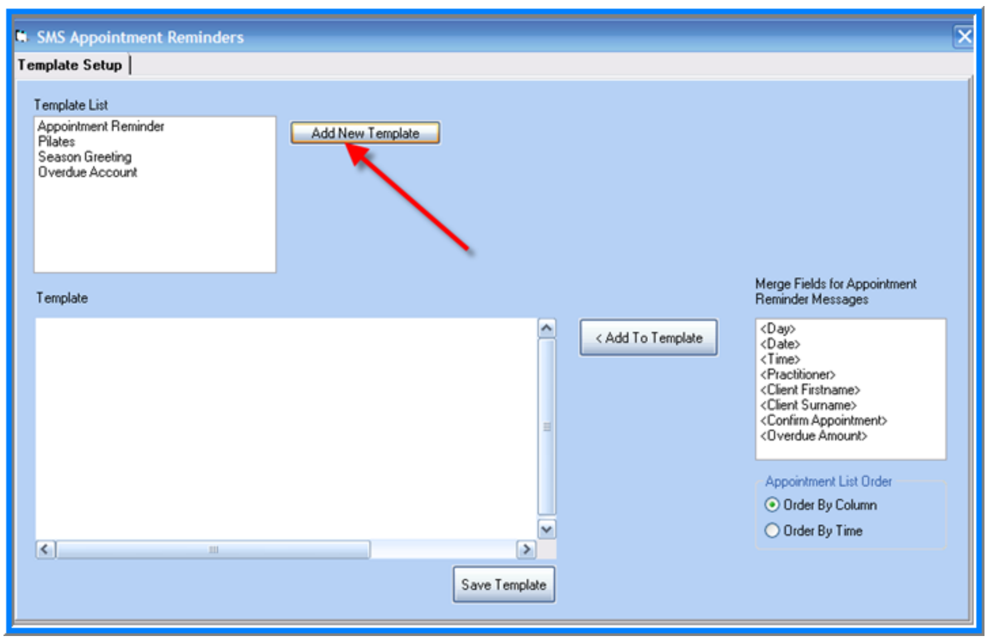
5.11 SMS overdue accounts

Click HERE to watch video

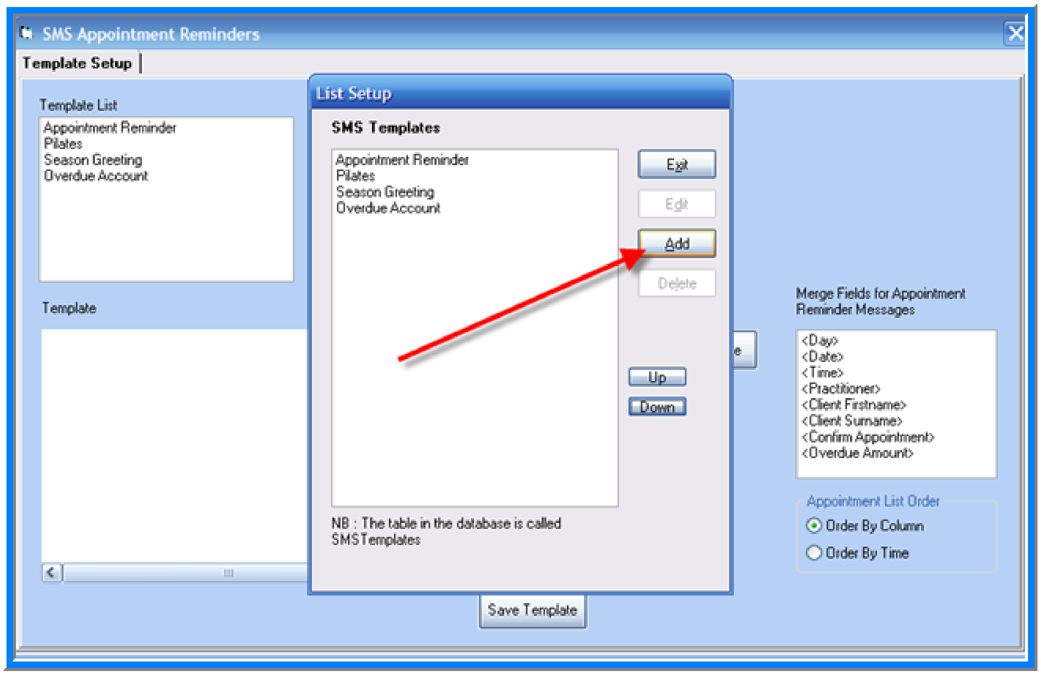
NB: You will need to set up an Account or Overdue account SMS template first.
To do this on the Main Menu PPMP®



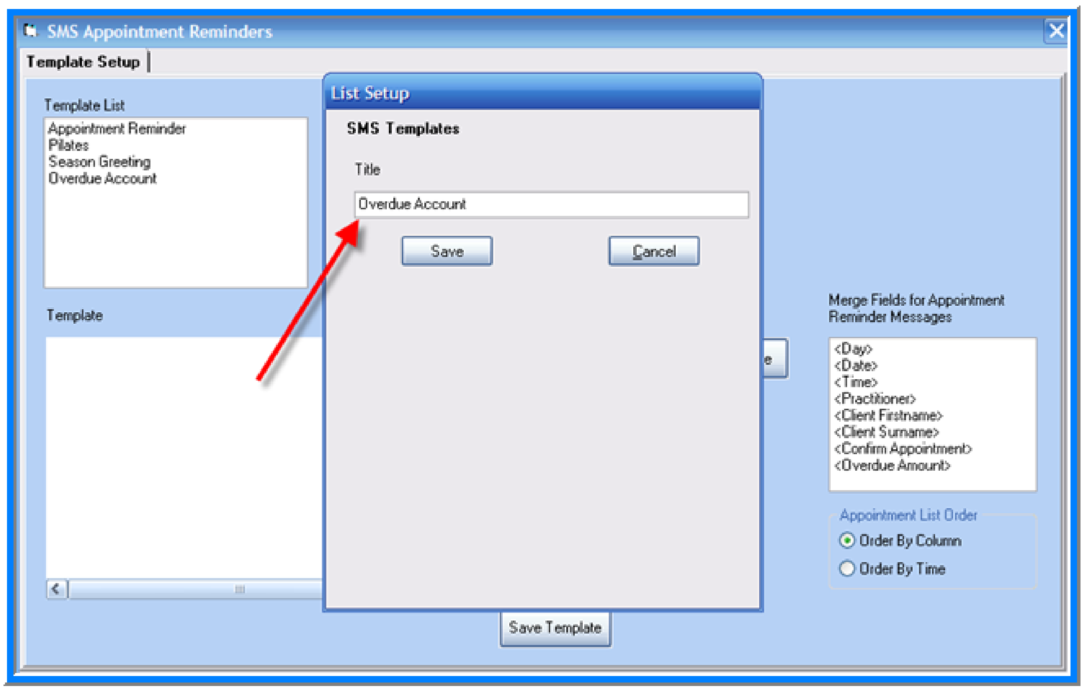
- Go to SMS Template Setup



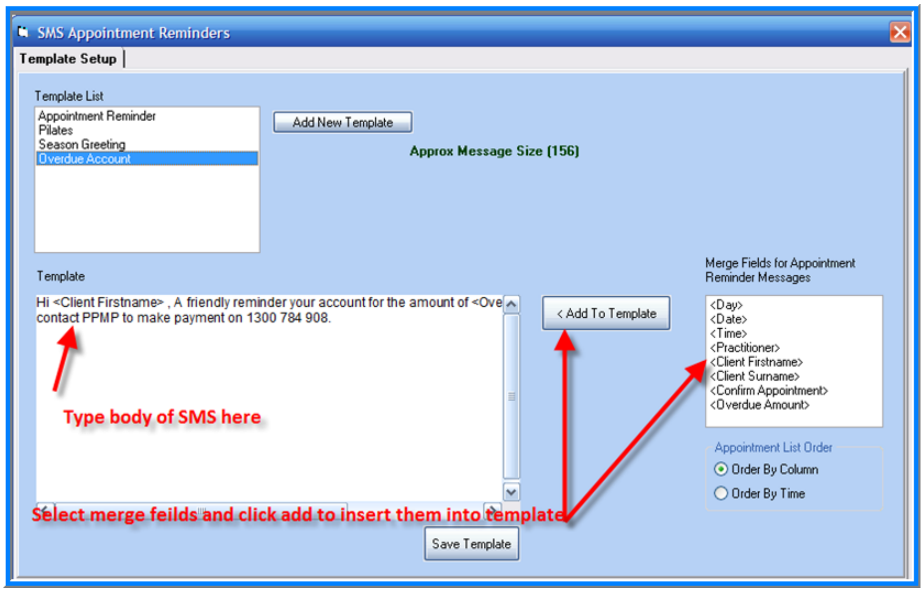
- Click Add New Template



- Click Add

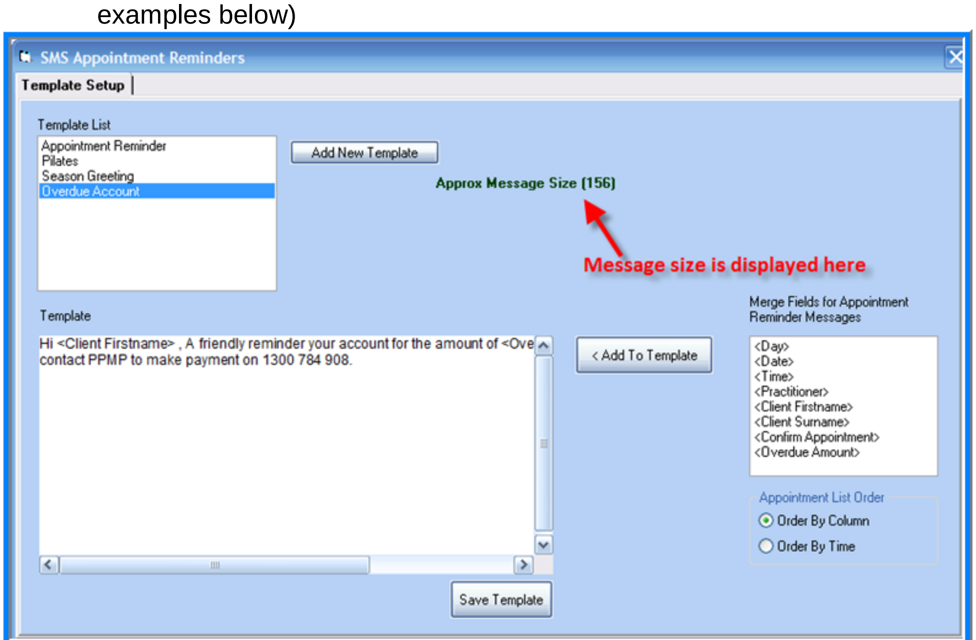


- Type in title for new SMS template (e.g. Account or Overdue account)
- Click save



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

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

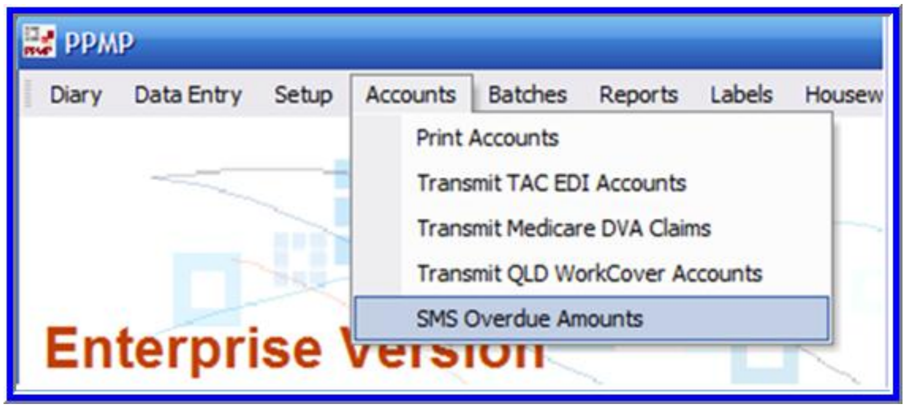


- Click save template

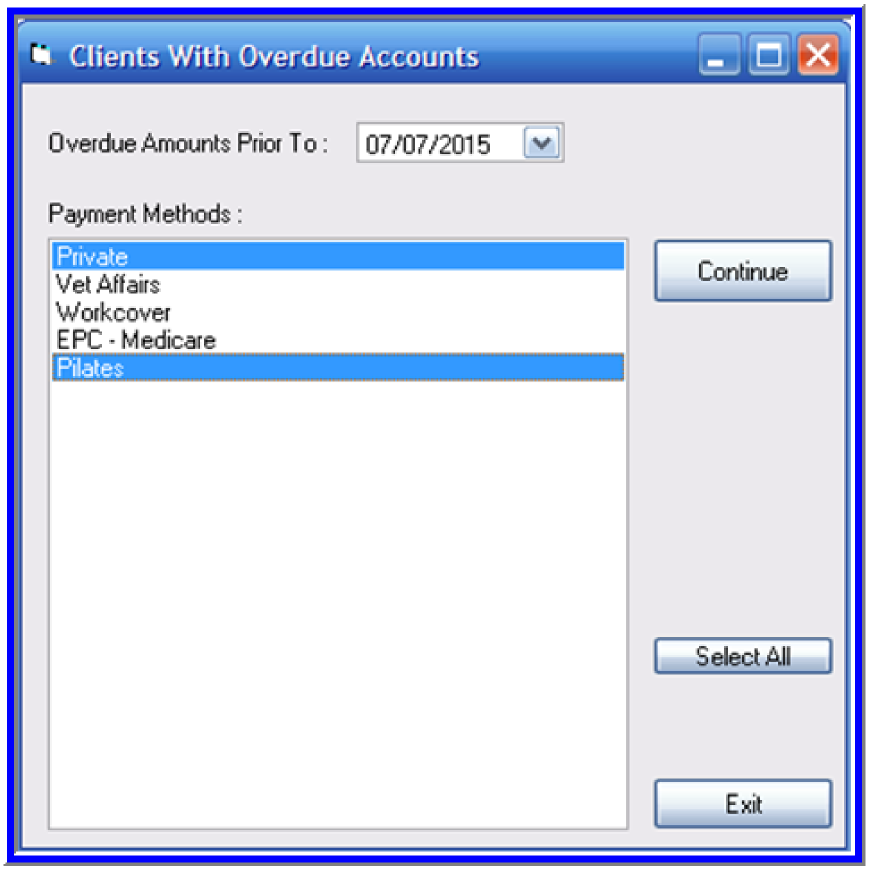
5.12 SMS account run

Click HERE to watch video

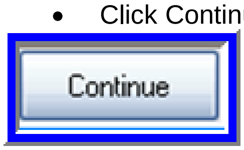
On the Main Menu PPMP®

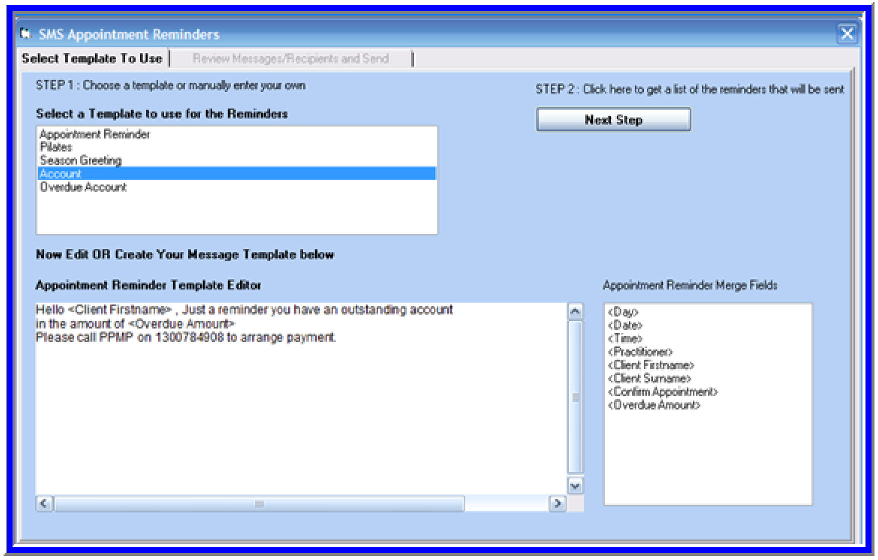


- Select Accounts
- Select SMS Overdue Amounts



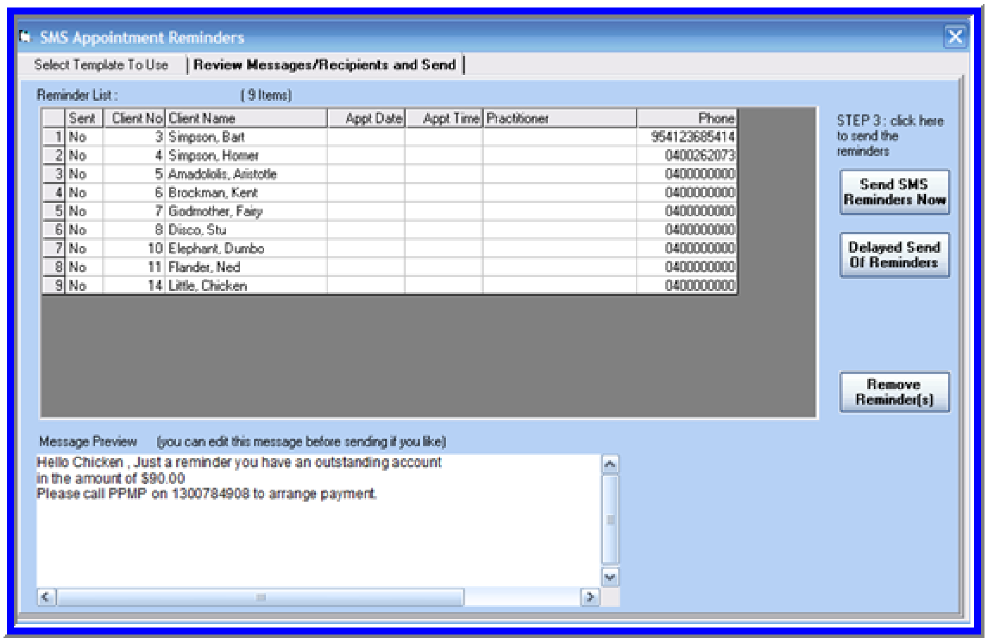
- Click Continue



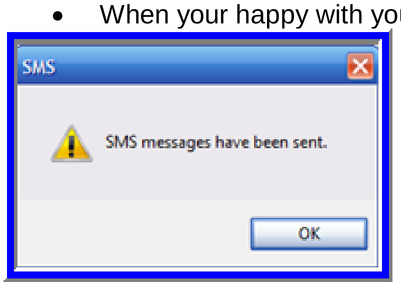


- Select the template you wish to use and click Next Step

- 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.



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



- Your messages have now been sent.

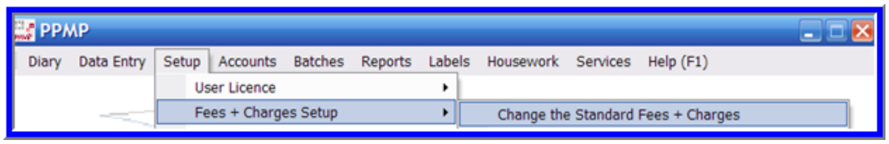
6 Alarms

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

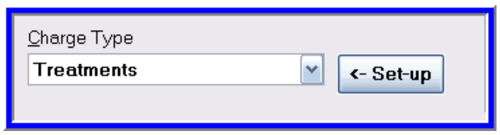
For compensation patients in particular or any patient in the database there is a function that allows you to set a date or a specific number of treatments, where once they have reached or passed the set date or treatment number the system will give you a warning.

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

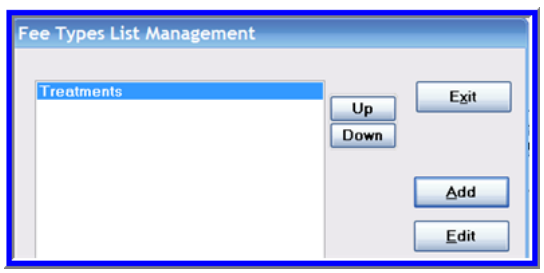
Go to Setup (on the Main Menu)



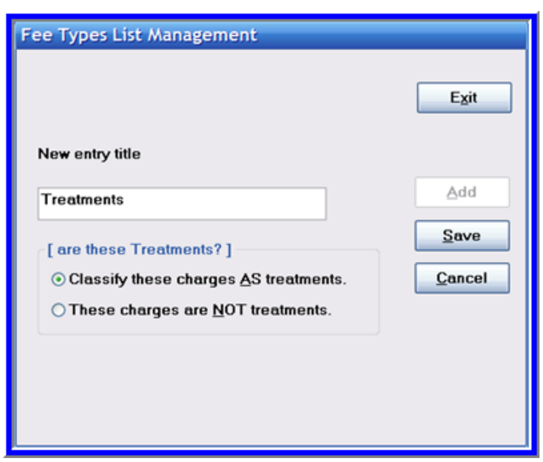
- Fees & Charges Setup
- Change the Standard Fees & Charges



- Click Setup (next to Charge Type)



- Select Treatments
- Click Edit

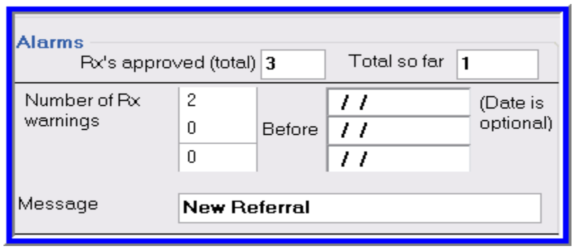


- Select “Classify these charges AS treatments”
- Save & Exit and back to the main menu.

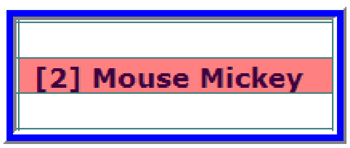
- Open a client's file and go to Episodes
- Click on Alarms – To Do List

There are a few different alarms explained as follows: -

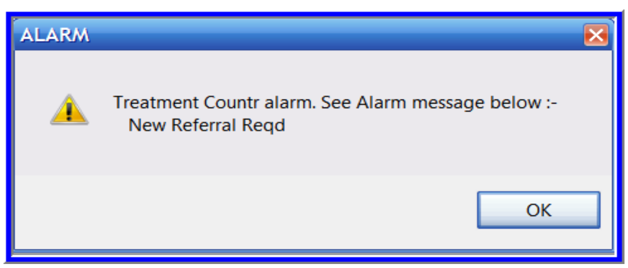
1. Number of Treatments Approved (total)



- 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.

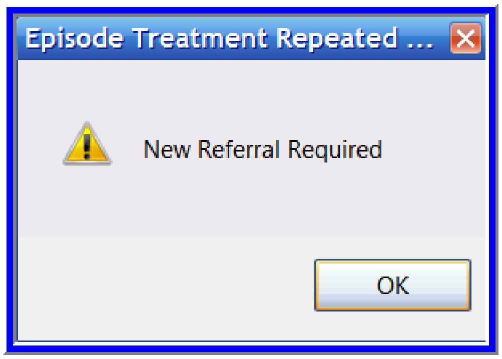


- By entering the date after the number of treatments this allows you to set a number of treatments within a certain time frame and a small message in the message field. Therefore once the patient has been charged for the number of treatments set in the alarm section (before the optional date) you will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

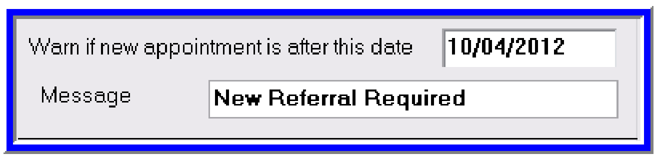
2. Repeated Appointments

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

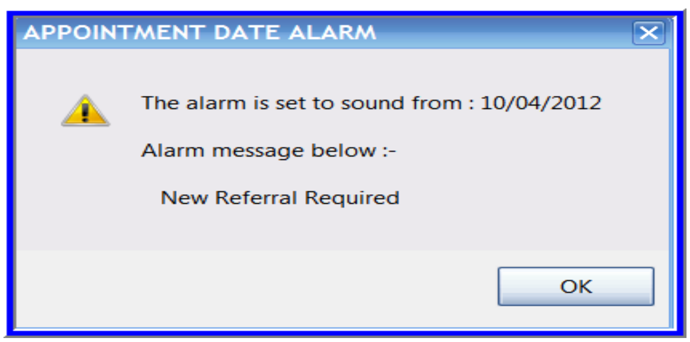


- This alarm is triggered at the time the treatment is recorded (charged).

3. New Appointment



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



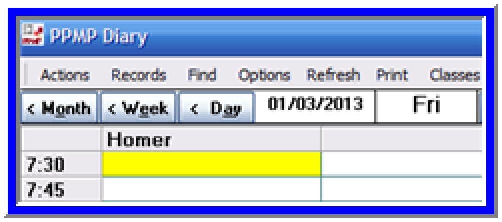
- When making an appointment on the diary after that date the alarm will be triggered and the message will be displayed.

7 Appointments

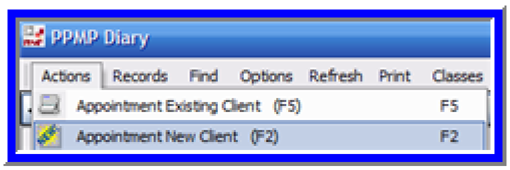
When making an appointment you will be faced with one of three situations.

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

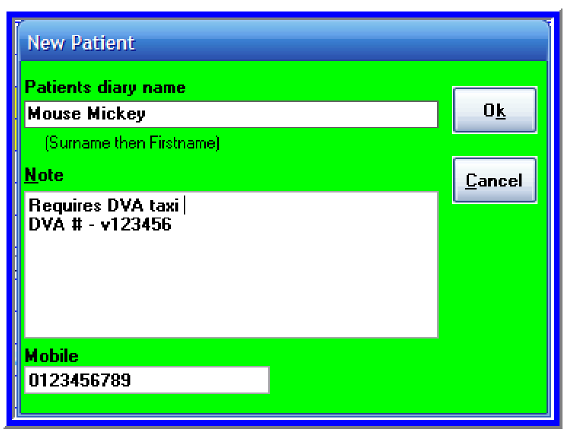
7.1 New client appointments



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

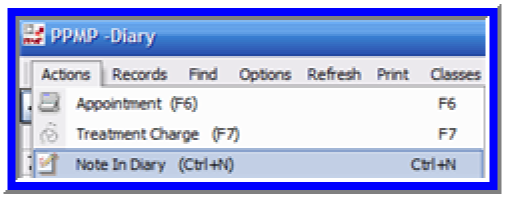


- Click 'Actions'
- Select 'Appointment New Client'

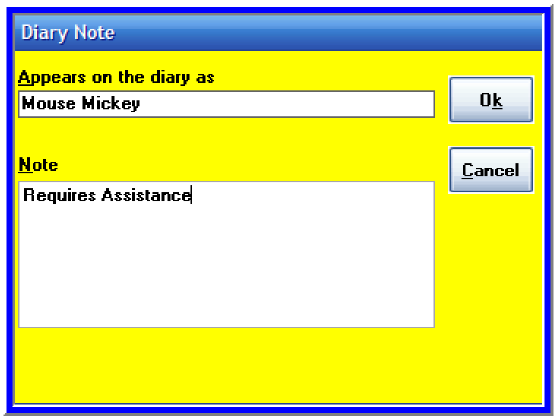


- An input box will be displayed with an area to type the patient's name.
- It is recommended you use the convention **Surname** then First name when entering names.
- Press Enter
- This will move you to the notes area. (Use this to make a note about new patients e.g. Requires assistance or phone numbers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



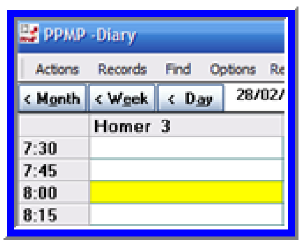
- Click Actions
- Click Note in diary



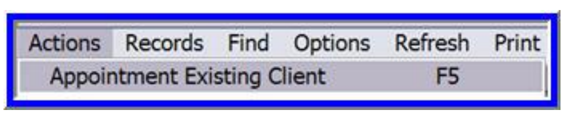
- You should now be viewing the above screen – you can add or change things in the note or mobile area.

7.2 Existing client appointments

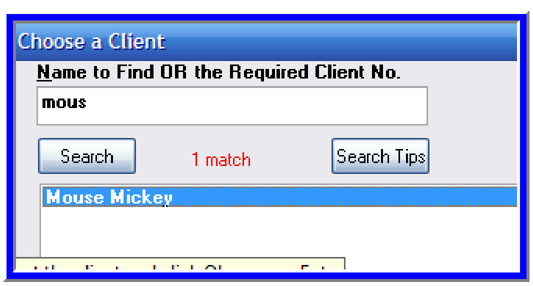
Click HERE to watch video



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



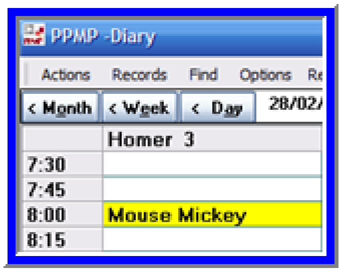
- Click Actions
- Select Appointment Existing Client



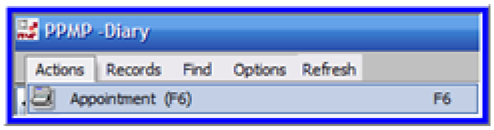
- The Choose a Client box will appear
- Type in Surname of client (or 3-4 letters)
- Highlight the client you want on the list
- Click OK - the appointment will be entered on the diary.

7.3 Rebooking clients from a diary appointment

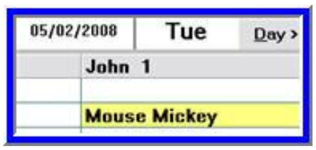
Click HERE to watch video



- Select the existing appointment from the diary.



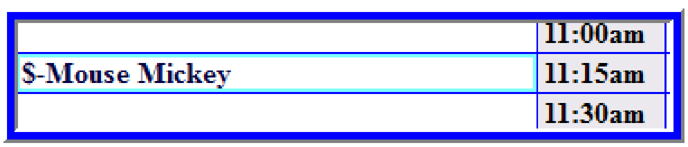
- Click Actions
- Click Appointment



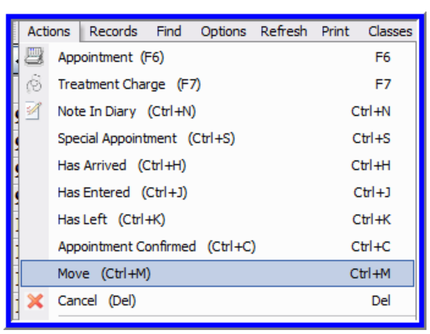
- Move to where you want to put the new appointment & Press Enter

7.4 Moving appointments

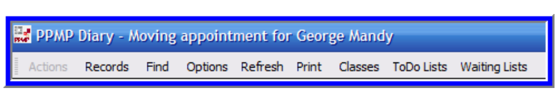
Click HERE to watch video



- 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®.

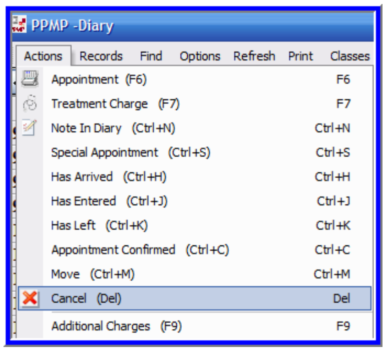


- Select the appointment day, time and column where you want to move the appointment to and double click on the empty spot to insert the patient.

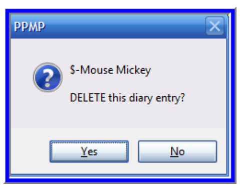
7.5 Cancelling appointments

Click HERE to watch video

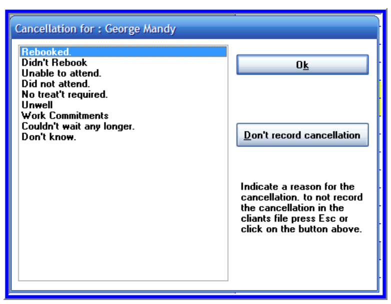
- Select the appointment on the diary that you want to cancel.
- Click Actions
- Select cancel



- A new option menu will now appear

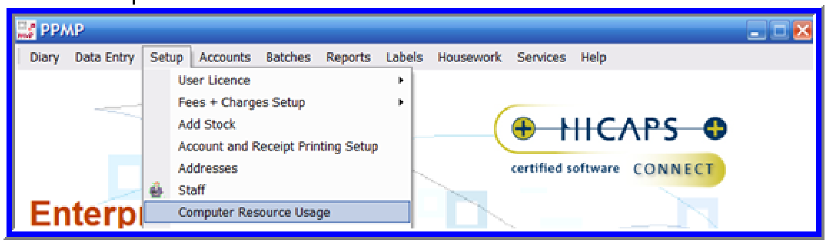


- At this stage if you have made a mistake you can select no and nothing will be canceled.
- Select **YES** if you are sure you want to cancel this appointment.
- You will now be given an option list to record the reason for the cancelation.
- Select the reason and click ok.

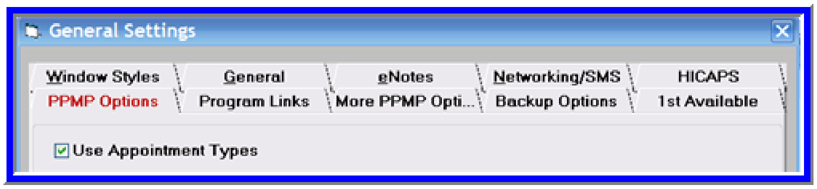


8 Appointment types

Go to Setup on the Main Menu

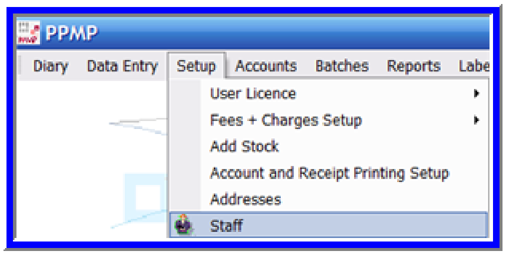


- Computer Resource

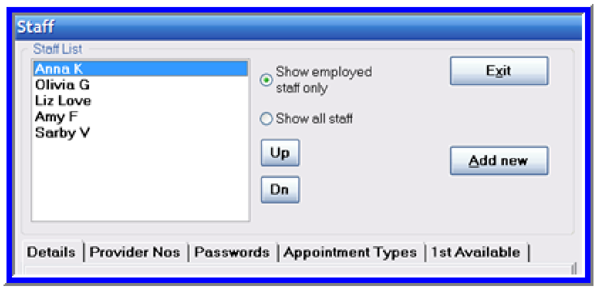


- Click PPMP Options
- Tick Use Appointment Types
- Click OK
- Close PPMP and Re Open

On the Main Menu



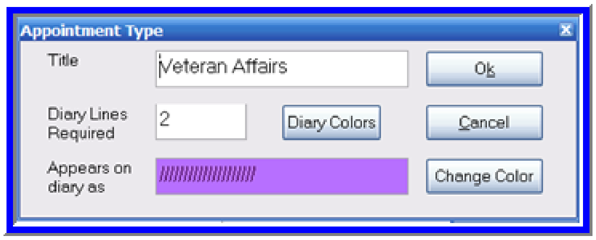
- Go to Setup
- Staff



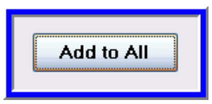
- Select staff member
- Select Appointment Types

- Click Add New

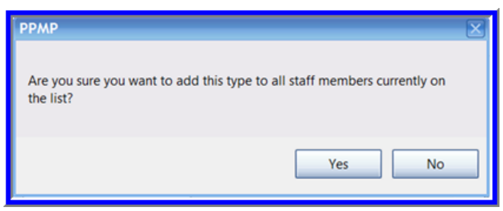
- Enter a Title Name
- Select how you would like it to appear on the diary
- Click Change color



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

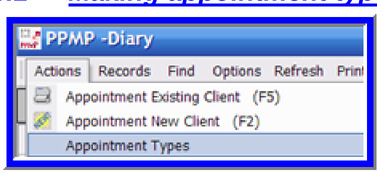


- Click Add to All (this will add the same appointment types to all staff)

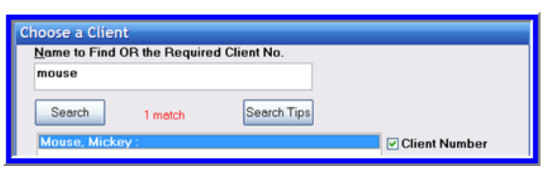


- Click Yes

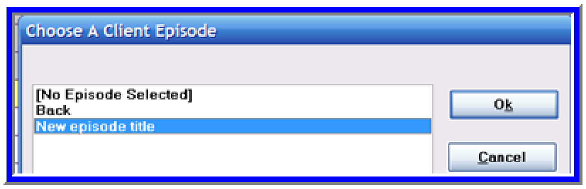
8.1 Making appointment types



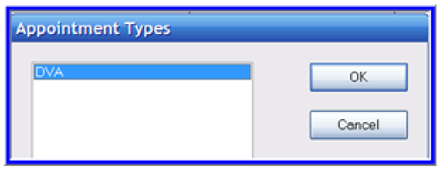
- Click Actions
- Click Appointment Types



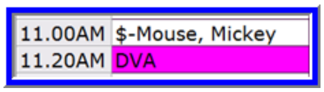
- Select client
- Click OK



- Select Episode
- Click OK



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



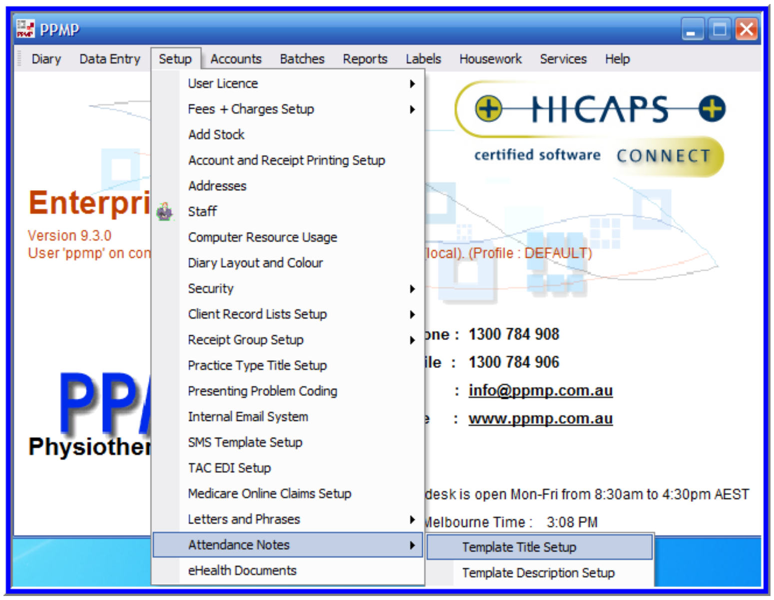
- The Appointment type requires 2 lines
- Charge and receipt as normal

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

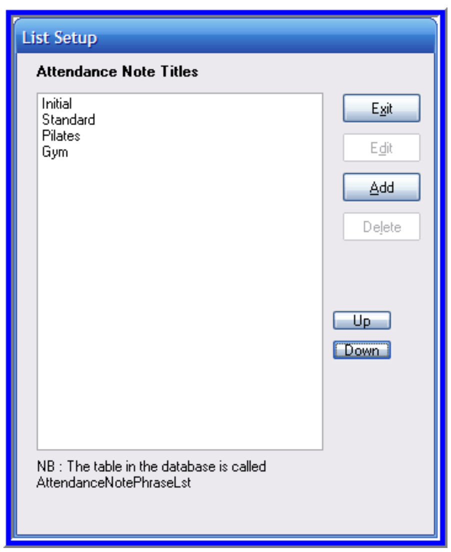
Click HERE to watch video

9.1 Template setup

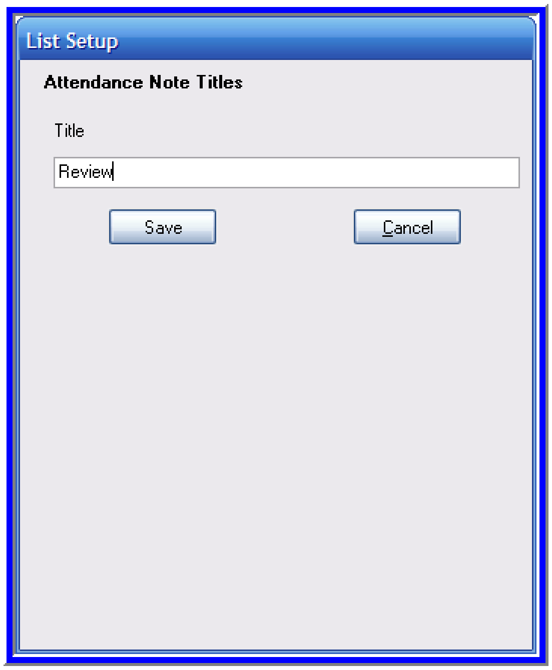
From the Main Menu of PPMP®



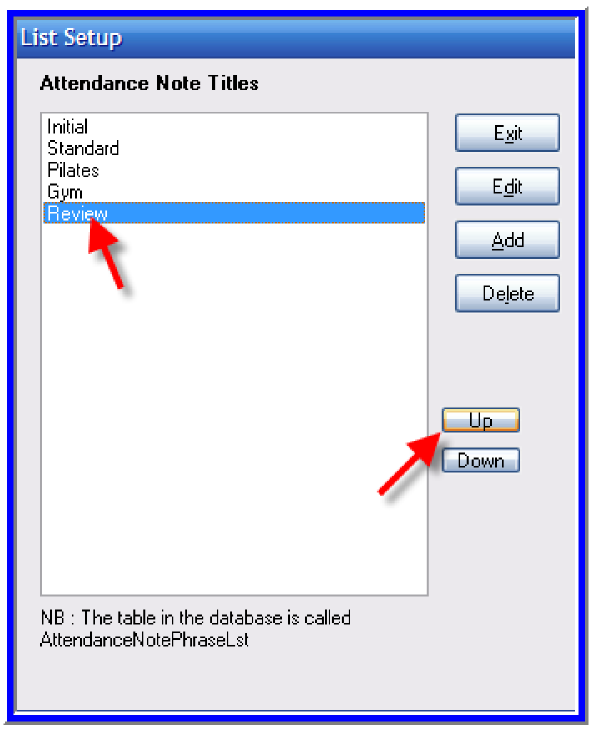
- Select Setup
- Select Attendance notes
- Select Template Title Setup



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

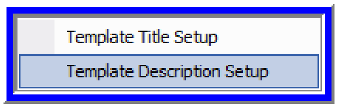


- Type the new title list name and click save

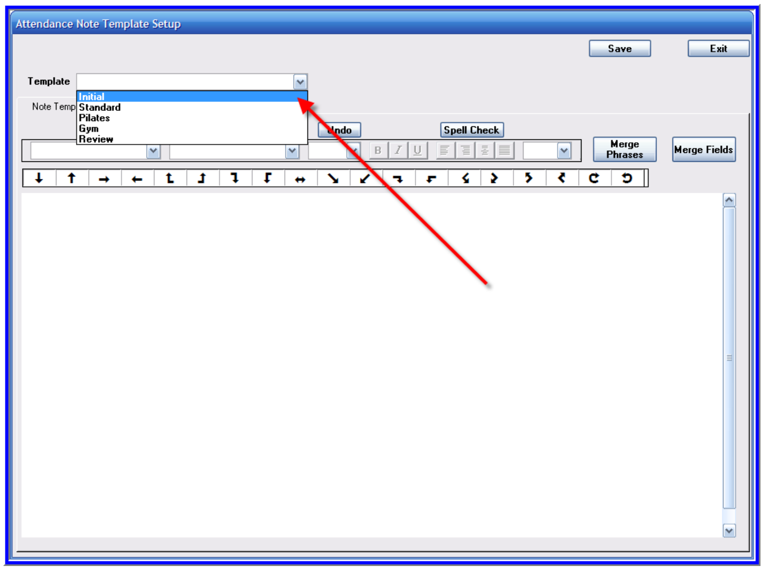


- The new title will appear in the list. You can move its position in the list with the UP/DOWN buttons on the right-hand side.
- Once happy with the list and all Title Templates are set click Exit

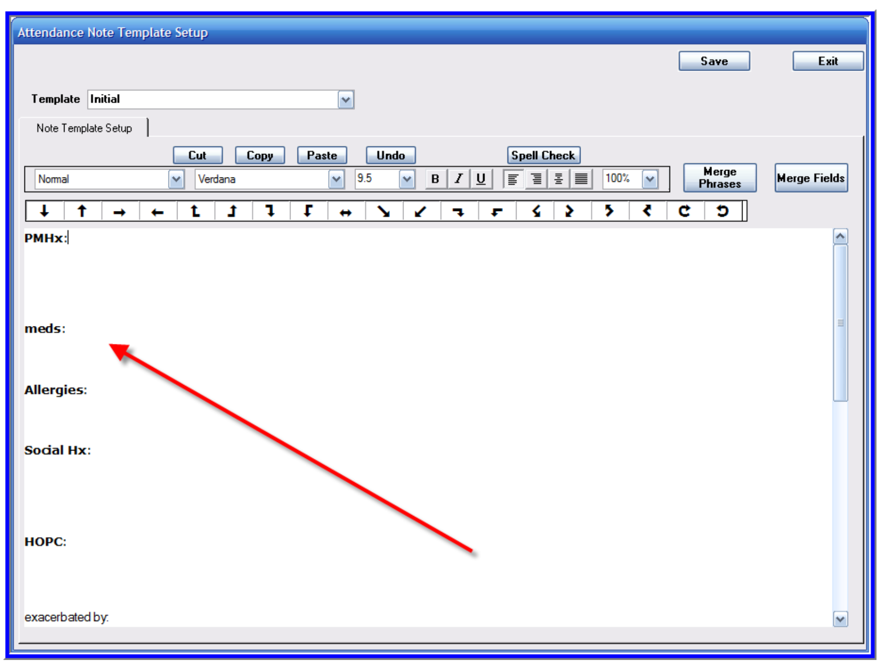
9.2 To add the body of the template



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

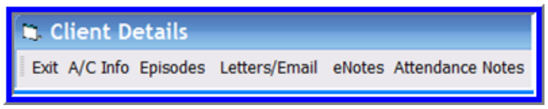


- Select the drop down box and select the Title you wish to edit
- Select Attendance notes
- Select Template Description Setup

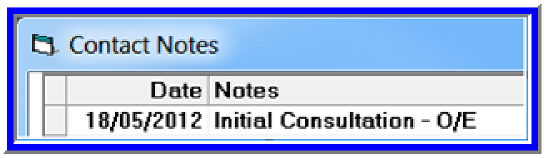


- Simple type in your information you can also use merge fields in here.
- Click Save & Exit
- Repeat this for all titles you wish to set a template in

Go to Client Details Screen

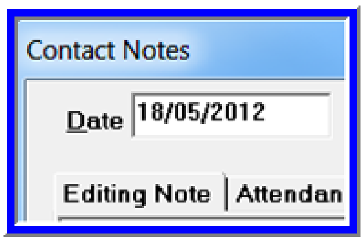


- Select Attendance Notes

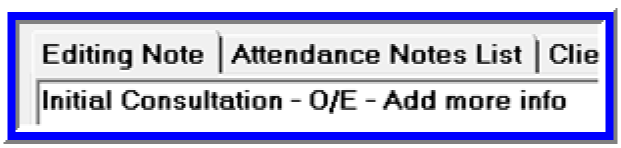


- Select Date for Editing

- Click Edit

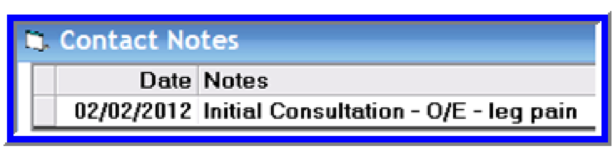


- Click Editing Note

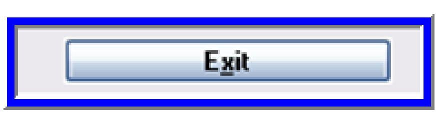


- Add extra text to your notes

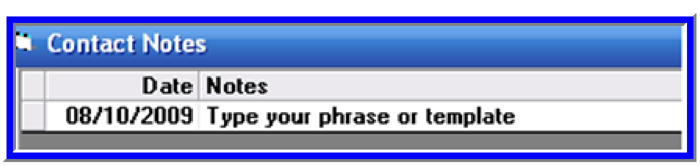
- Click Exit & Save Changes



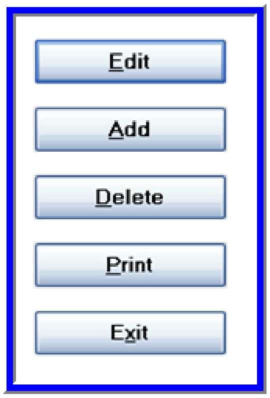
- Phrase is inserted in notes
- You can add or edit text – click on date



- Click Exit & Save Changes



- All notes are listed



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

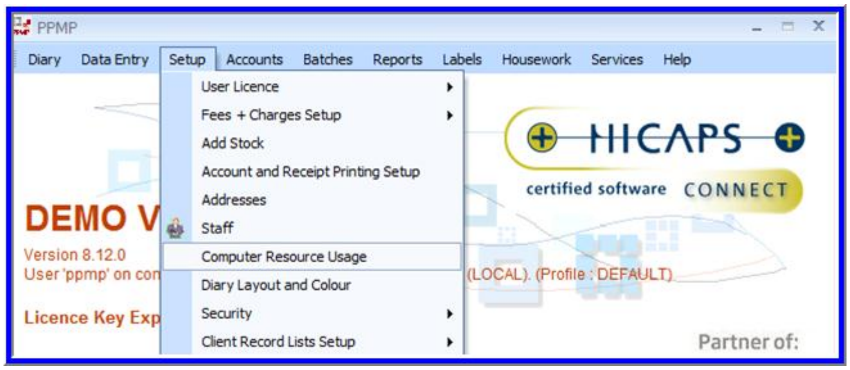
OR

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

10 Backup instructions

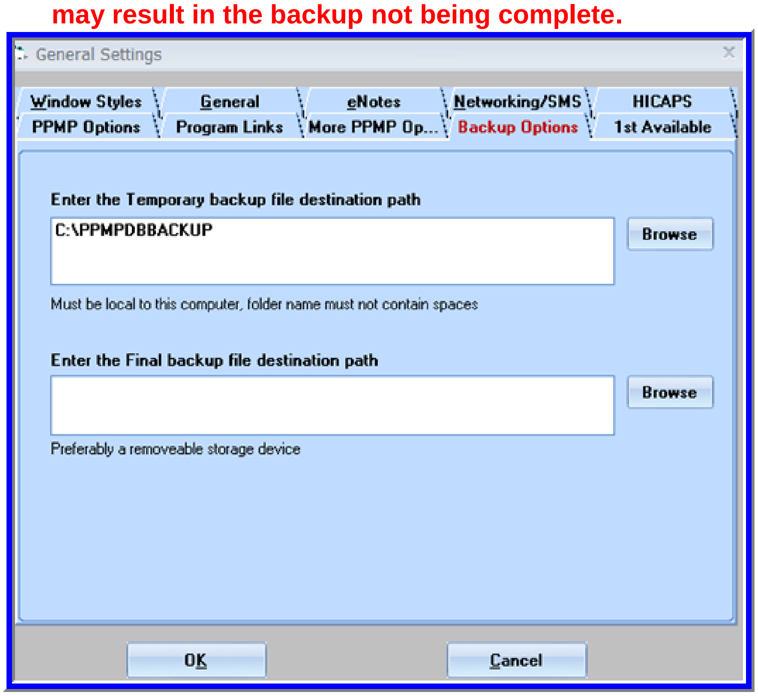
Click HERE to watch video

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



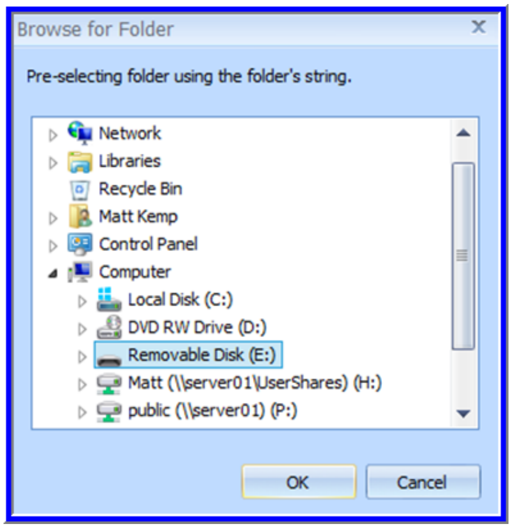
- Click on the ‘Backup Options’ tab

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.

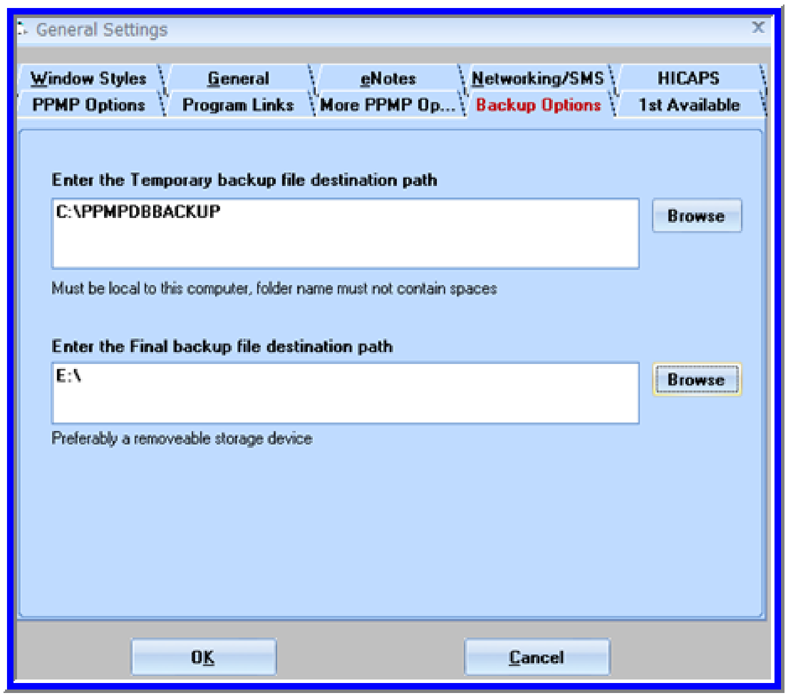


- Then select ‘Browse’ to enter in the final backup file destination path

  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’

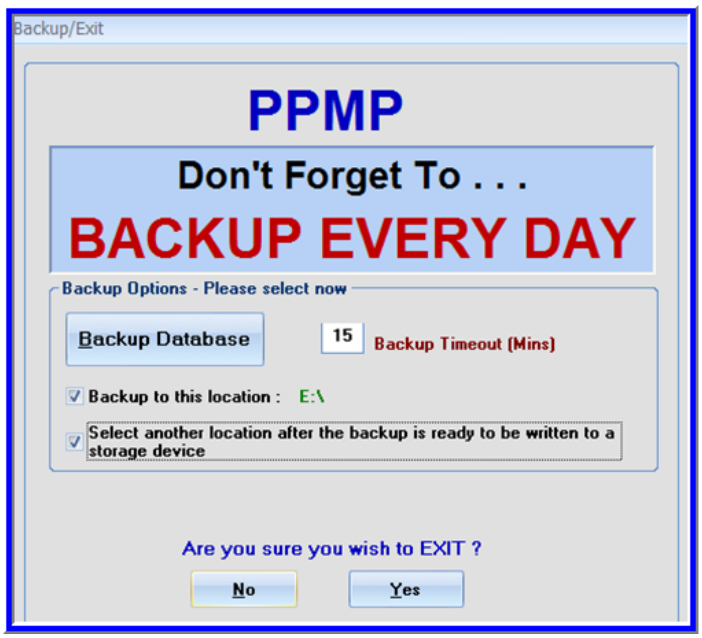


- Once you have selected the location click the 'OK' button

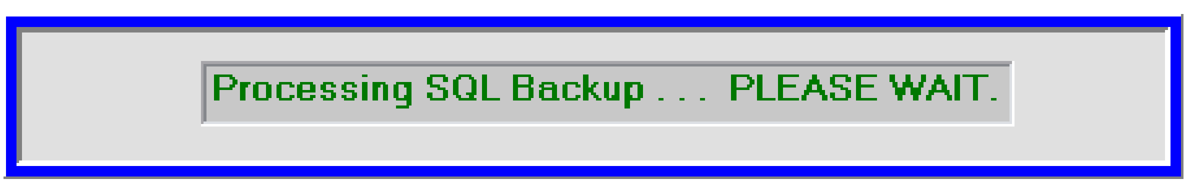


- You will then be taken back to the home screen
- For the changes to take effect you need to restart PPMP®. Click the 'X' in the top right hand corner

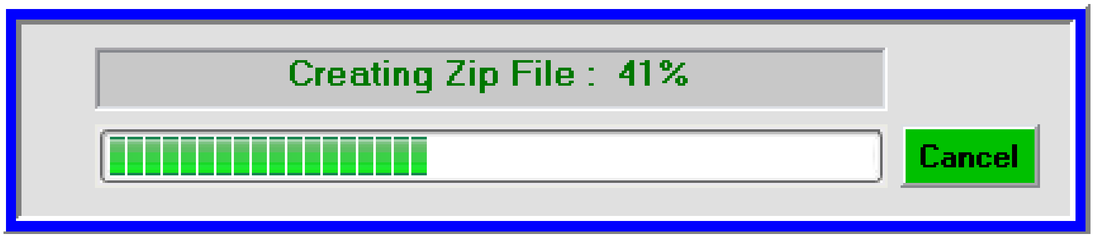
- If you wish to backup to another location, select the 2nd tick box. Once the initial backup is complete you will be prompted to select the location you wish to backup to.
- Click 'Backup Database'



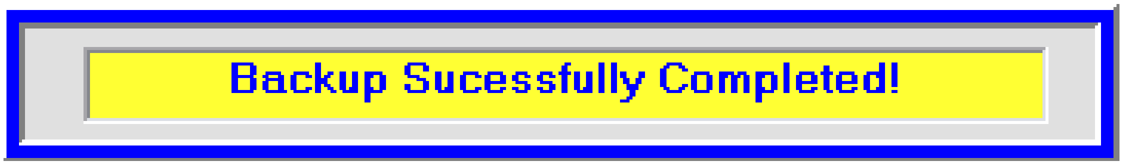
- The following window will appear indicating the backup process is happening…..Please wait



- 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®.

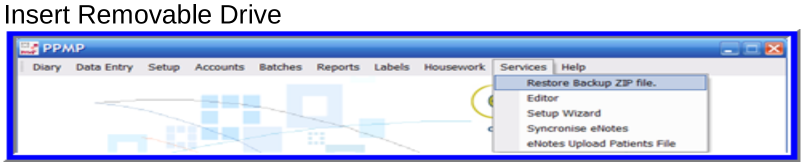


It is advisable to open your backup folder on the removable device and make sure all of the folders and the database are visible. If you are unsure, please contact our Customer Service Team for assistance – 1300 784 908/ Option 1 or info@PPMP®.com.au

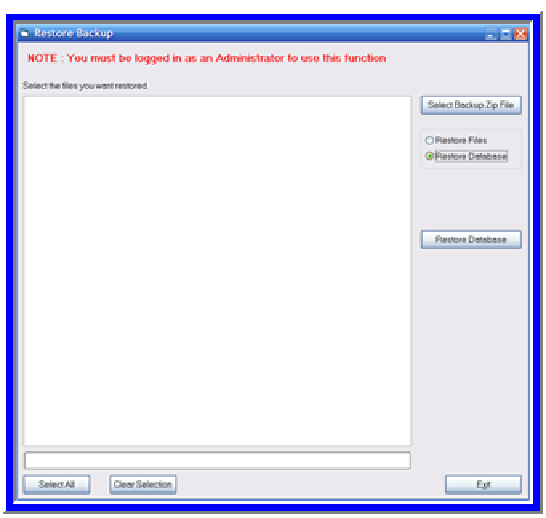
If using third party software, please contact us to discuss your requirements or to obtain help with a test restore. We will happily take calls from your IT provider if they have some specific or technical questions.

10.1 Restore PPMP® backup

Insert Removable Drive

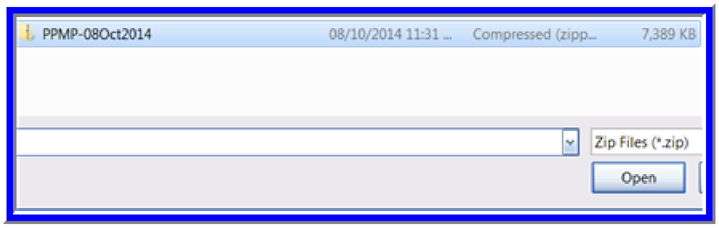


- Click on Services
- Click Restore Backup ZIP file

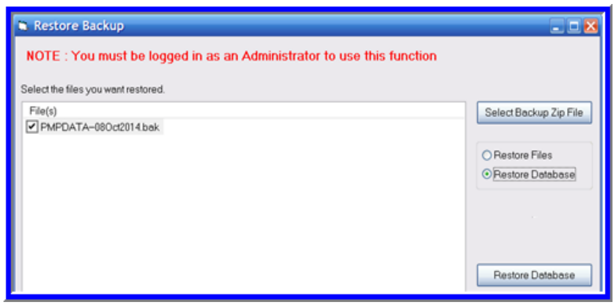


- Click on Restore Database or Select Backup Zip File

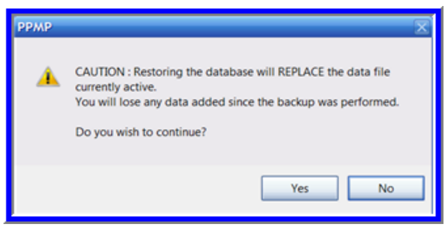
- Select Removable Disk Drive (or where browse to where backup is stored)



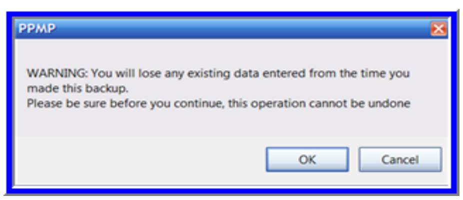
- Click on the file and Open



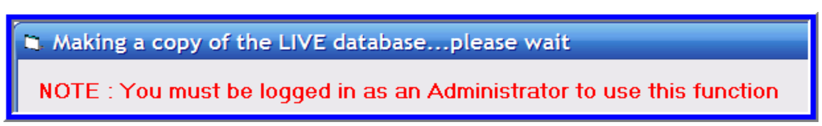
- Click Restore Database



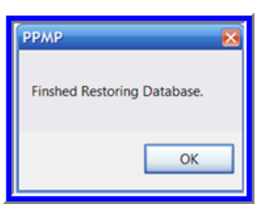
- You will get a warning to make sure you are not restoring over your current database otherwise you may lose some data
- Click Yes



- You will get another warning
- Click OK

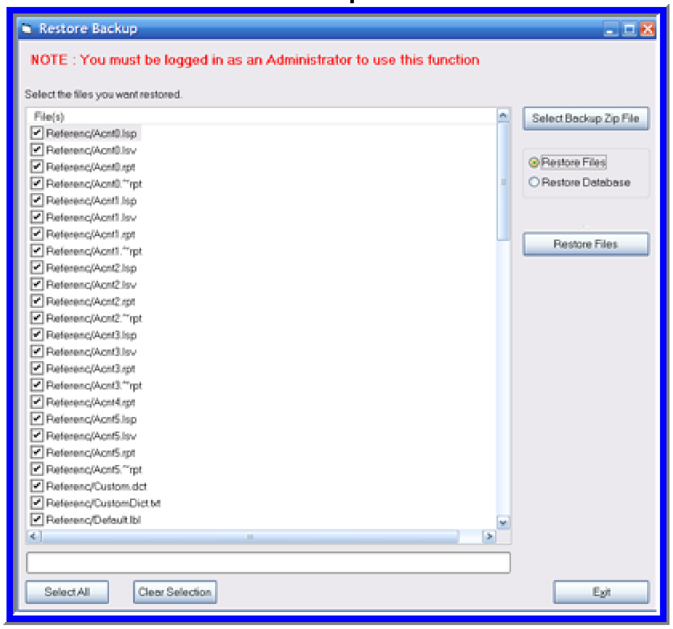


- Note – Making a copy of the Live Database

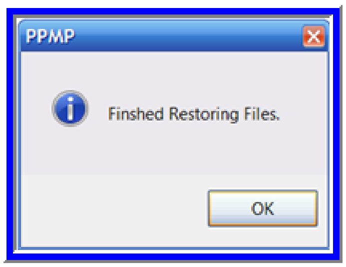


- Click OK

Back on the Restore Backup Screen



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

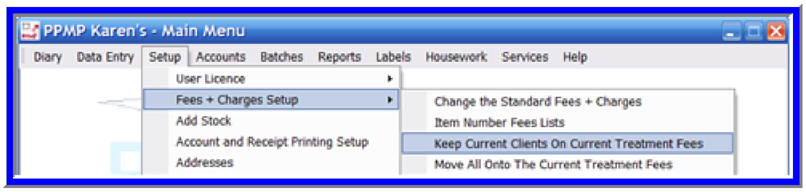


- Click OK
- Click Exit
- Close and re-open PPMP

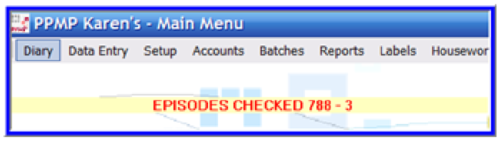
11 Changing fees in PPMP®

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

On the Main Menu

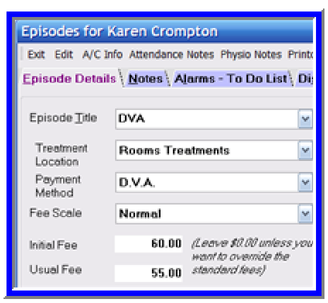


- Click Setup
- Fees & Charges Setup
- Keep Current Clients on the Current Treatment Fees



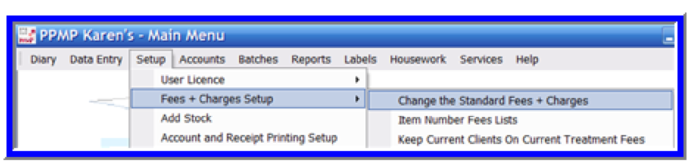
- System is adjusting fees in the client's episode screen

- Click OK

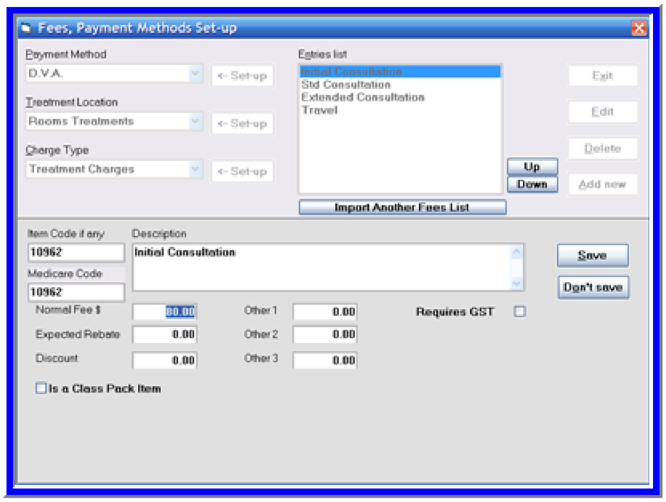


- Under Client Episode you will notice Initial Fee/Usual Fee have your current fees (relating to that episode)

Back on the Main Menu

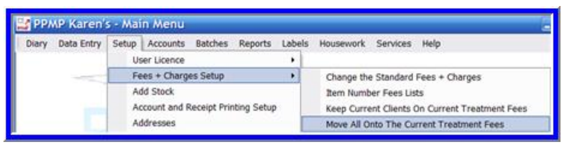


- Click Setup
- Fees & Charges Setup
- Change the Standard Fees & Charges

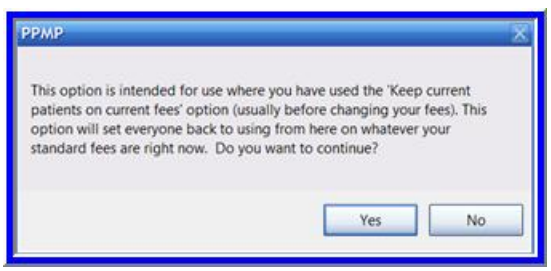


- Go through each Payment method and change Fees
- Click Save

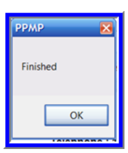
When you are aready to move ALL onto the new fees



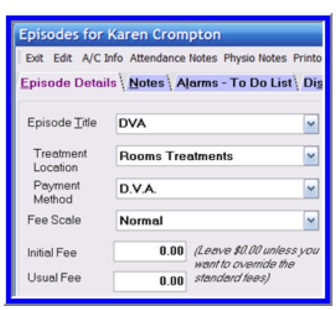
- Click Setup
- Fees & Charges
- Move All onto the Current Treatment Fees



- Click Yes



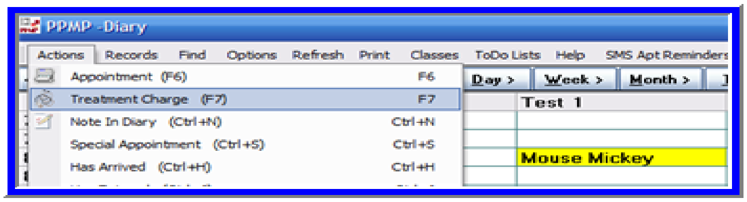
- Click OK



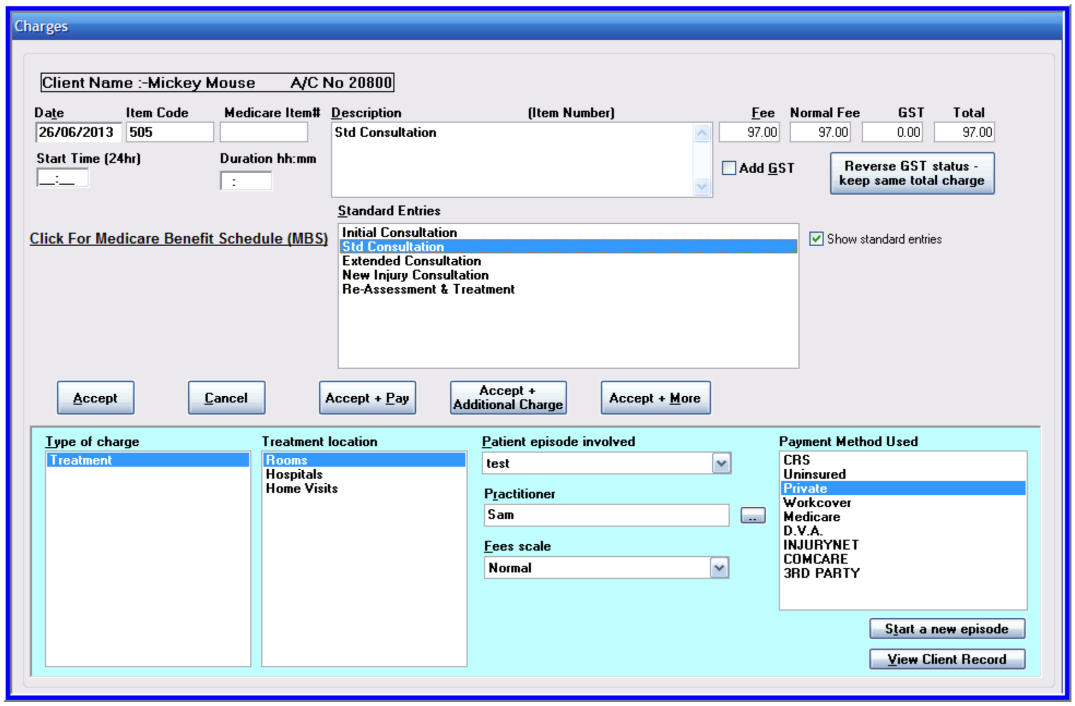
- In the Client Episode Screen the Initial Fee/Usual Fee should now be set to Zero.

12 Charging an appointment

Click HERE to watch video



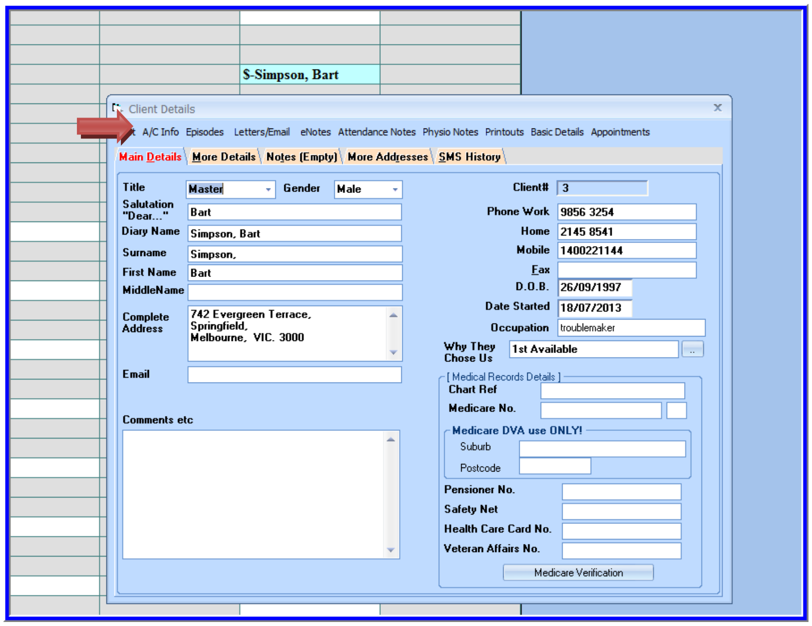
- Select the Client on the Diary
- Click Actions
- Select Treatment charge
- The list of your Fees & Charges will appear
- Select the correct charge



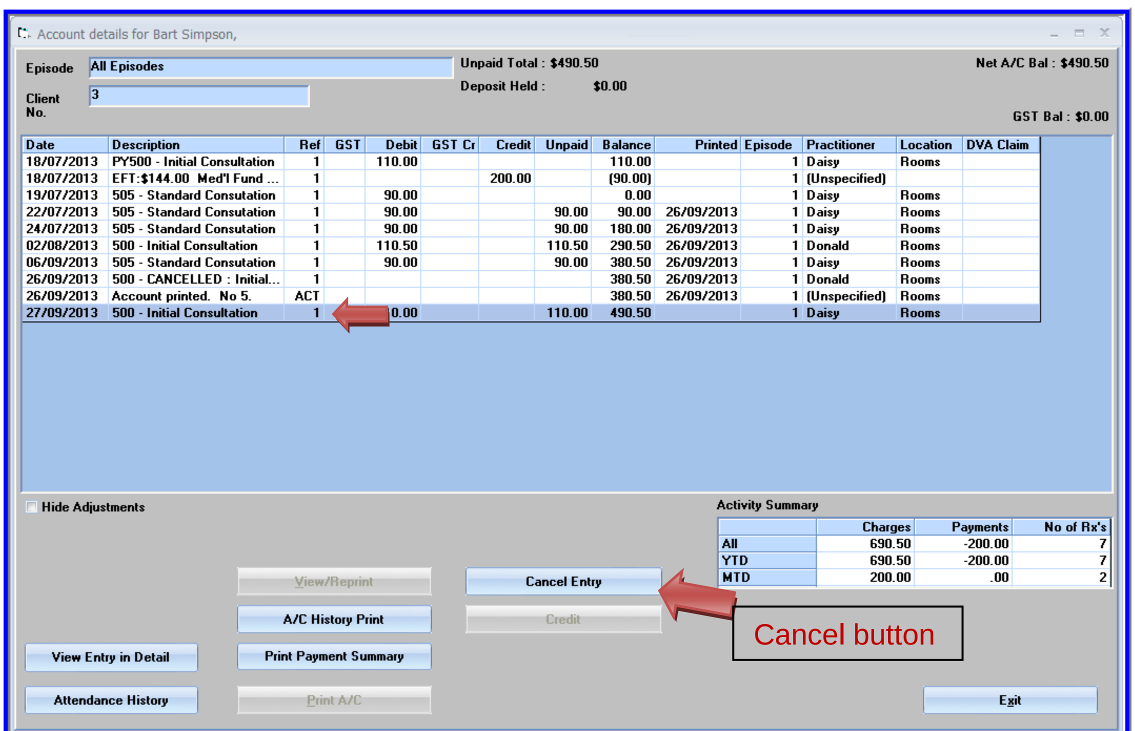
- Click Accept (or Accept + Pay – you will be taken to the Payment screen)

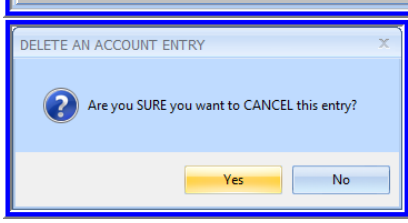
- Once the client has been charged for their treatment, their name on the diary will change colour.

12.1 Cancelling a charge



- 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





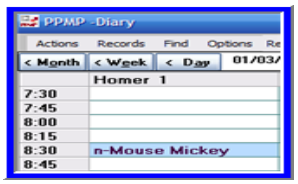
- Click Yes if you are sure you want to cancel this entry

Date	Description	Ref	GST	Debit
18/07/2013	PY500 - Initial Consultation	1		110.00
18/07/2013	EFT:$144.00 Med'l 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		

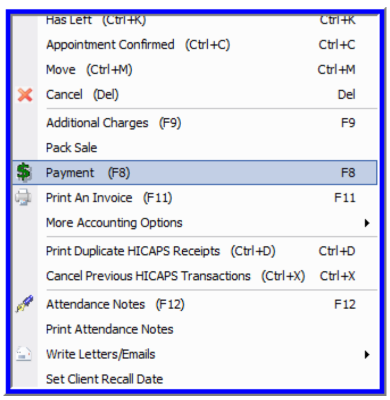
- The cancelled entry with now appear in the list.
  NB: Charges and Appointments cannot be removed from the diary due to auditing/security purposes – this will not affect reports, statistics etc.

12.2 Receipting a payment

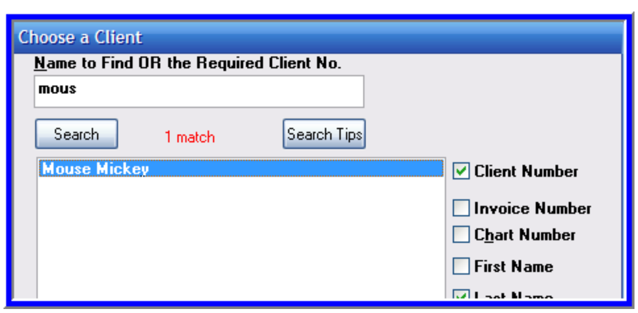
Click HERE to watch video



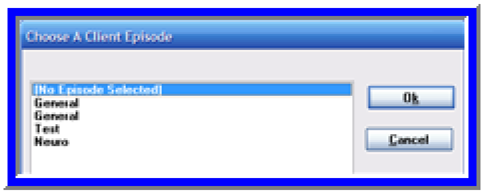
- If the client making the payment is already on the diary select that appointment.



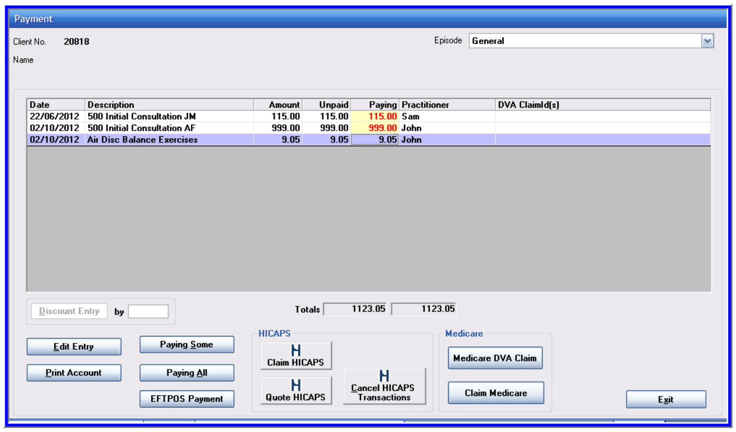
- Click Actions
- Click Payment



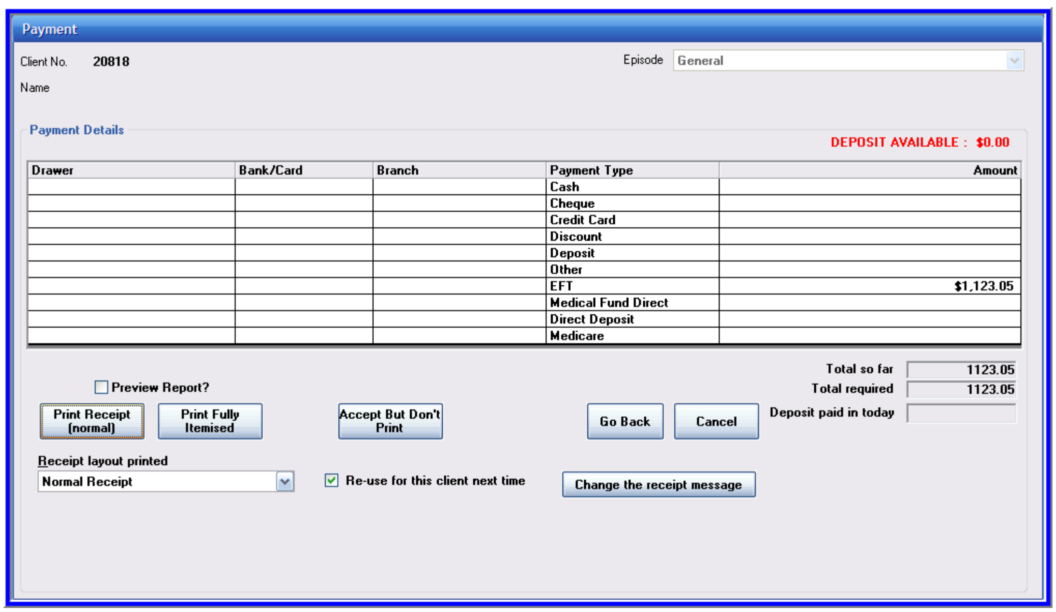
- If you didn't choose an appointment choose a patient from the patient list.



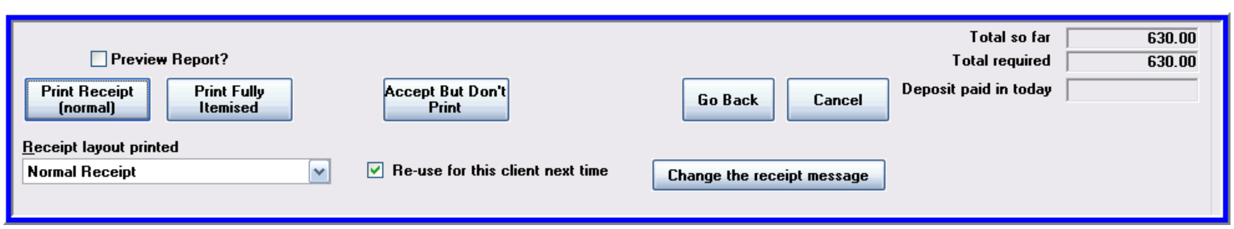
- If necessary choose the episode the payment is for



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



- Enter amounts being paid and how they paid



- 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.

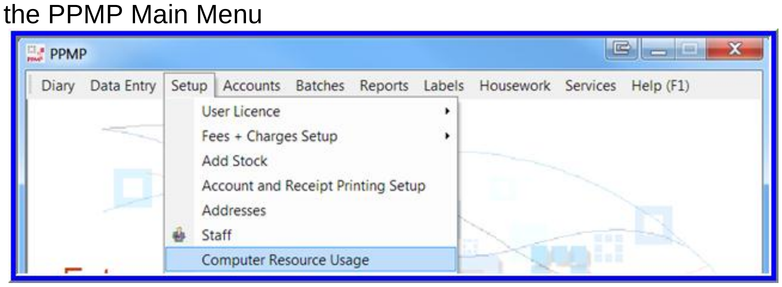
In the client’s episode you select this Payment Method. The system will then expect to find unused pack items in the file, and if it doesn’t find any it will ask you if you (optionally) want to sell them another one.

13.2 Setting Up

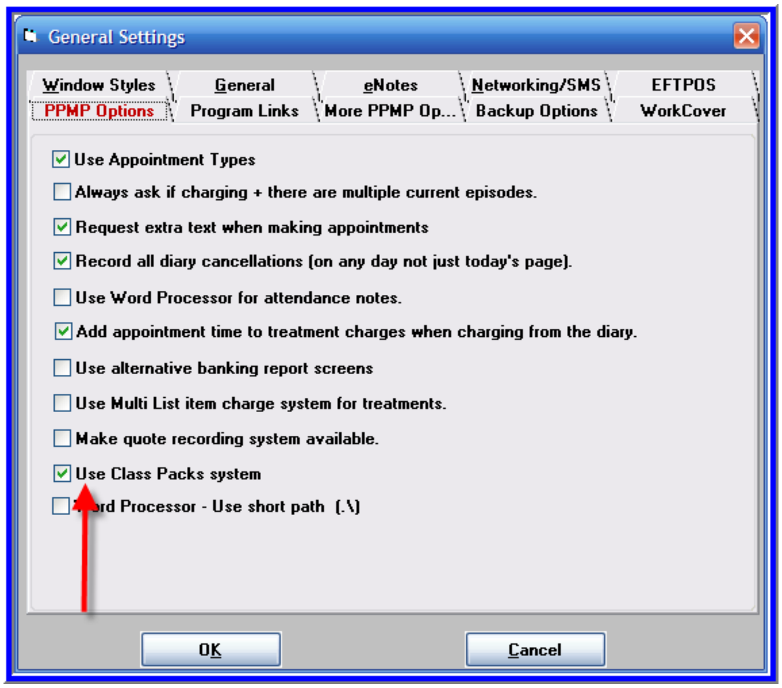
There are two parts to setting up.

Initializing the Class Packs

On the PPMP Main Menu

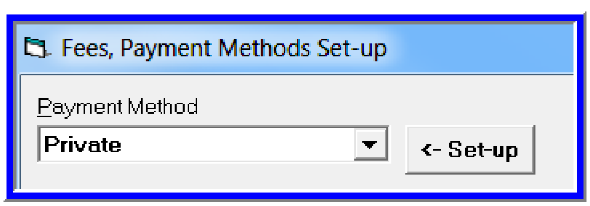


- Click Setup
- Computer Resource Usage

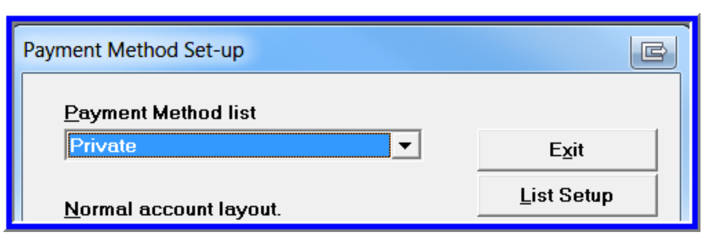


- Click PPMP Options
- Tick Use Class Packs System
- Click OK
- Close PPMP & Reopen
- Marking a Payment Method as a Class Pack Payment Method
- On the PPMP Main Menu

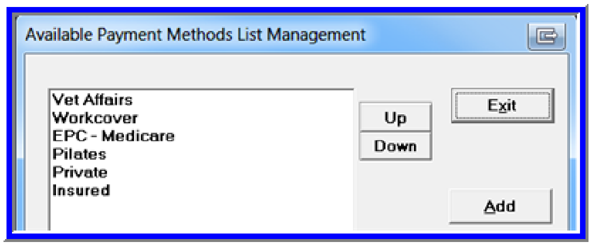
- Setup
- Fees + Charges setup
- Change the standard fees + charges.



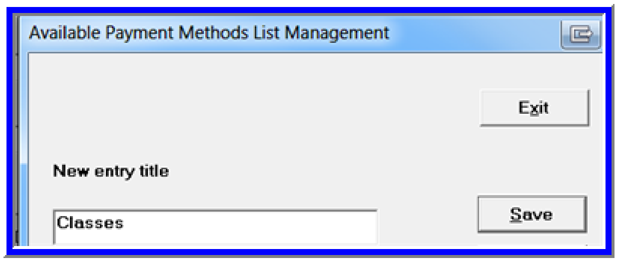
- Click on the Setup button beside the Payment Method List



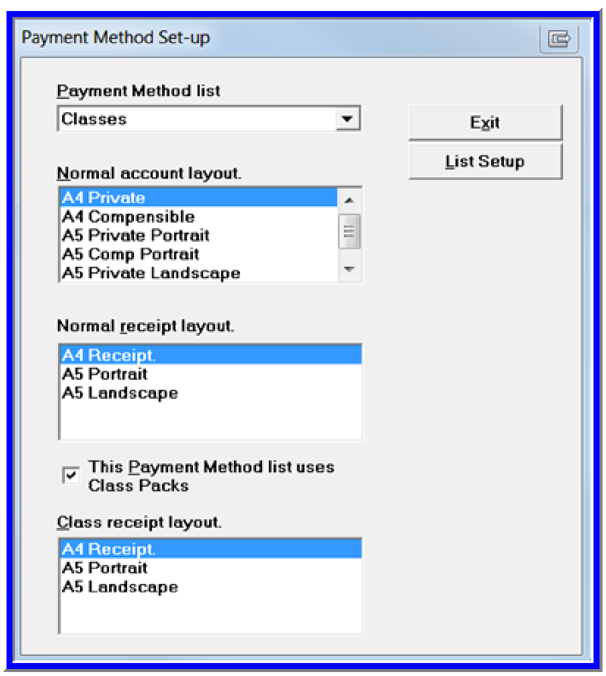
- Click on List Setup



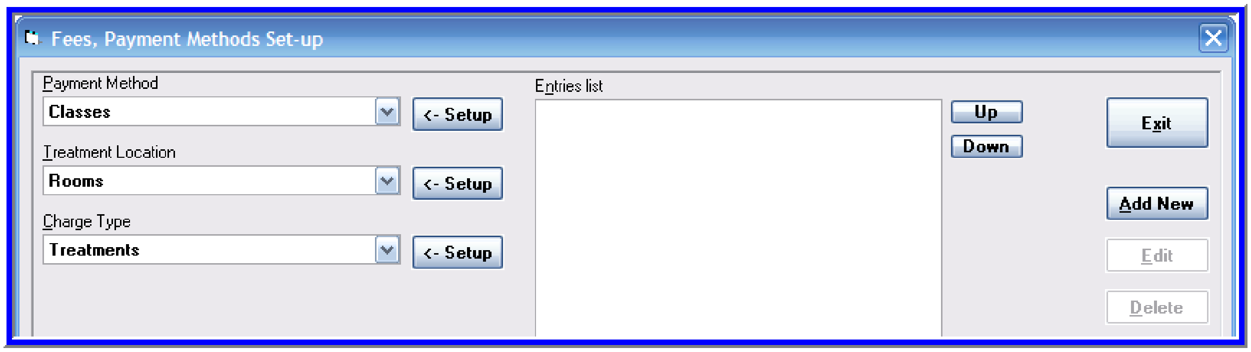
- Click Add



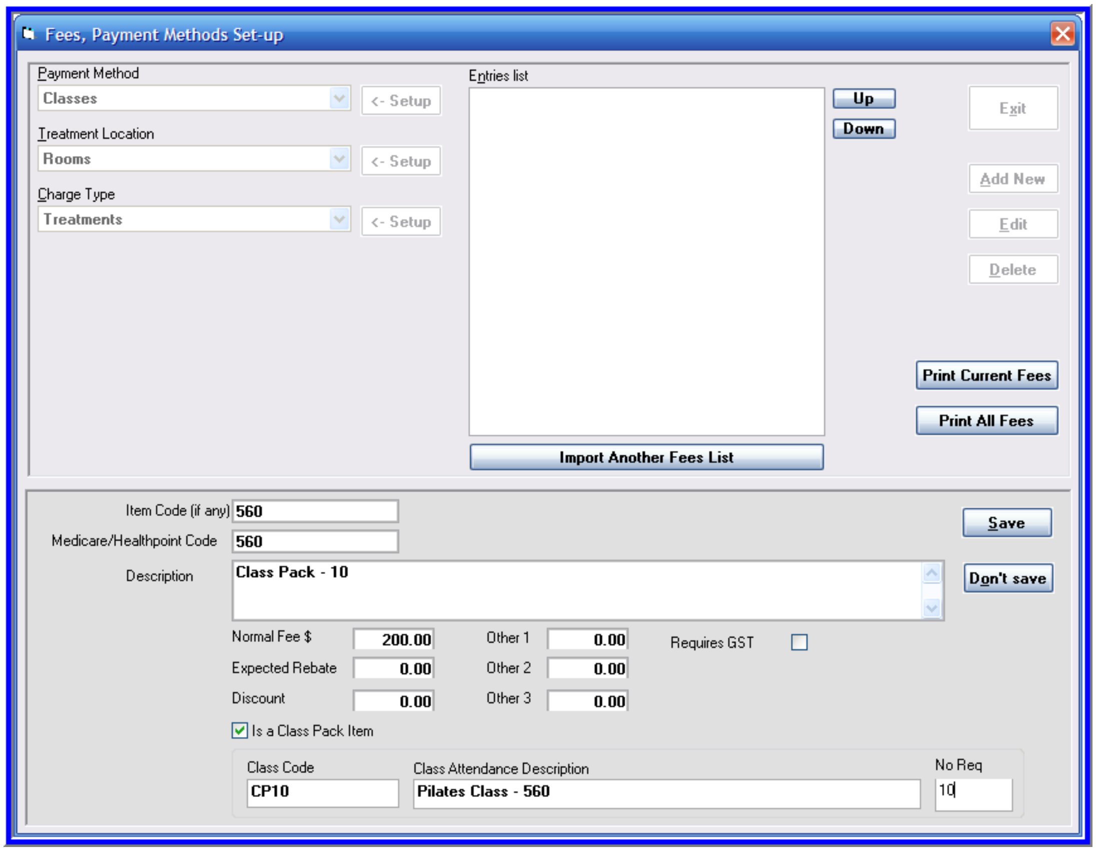
- Fill in the New Entry Title
- Click Save & Exit
- On the Payment Method Setup screen



- 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

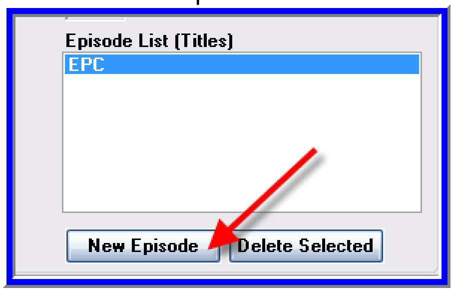


- Enter your Class Pack fees
- Tick is a Class Pack Item
- Fill in Class Attendance Description, Item Code & No. Required
- Click Save
- Continue until all Class Pack Items have been entered
- Click Exit

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

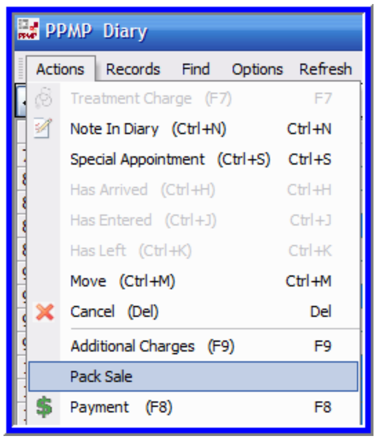
- Click Payment Methods and Select Class Payment Method
- Exit
- Save the Changes

You are now ready to sell a Pack

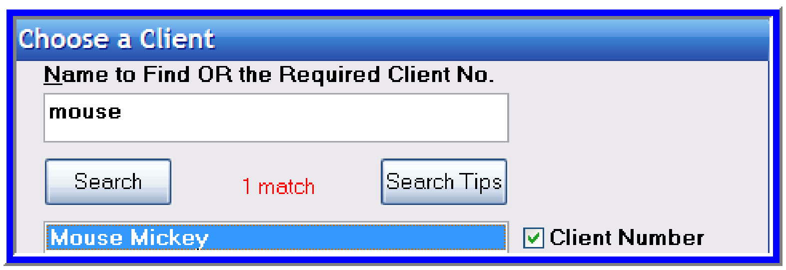
13.4 Selling packs

New Sale

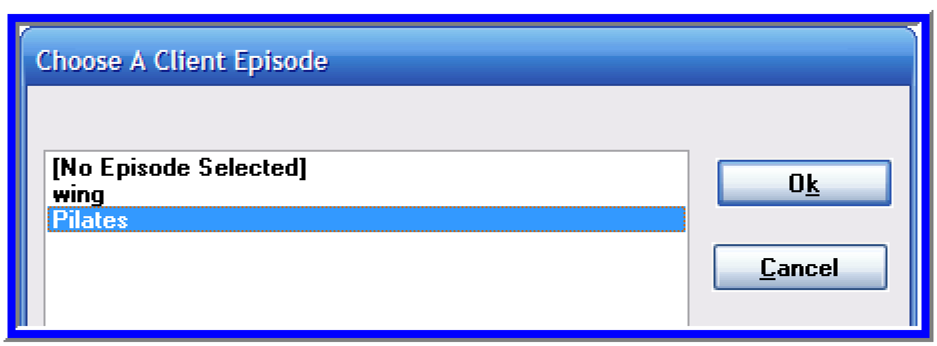
On a **BLANK SPOT** on the Diary



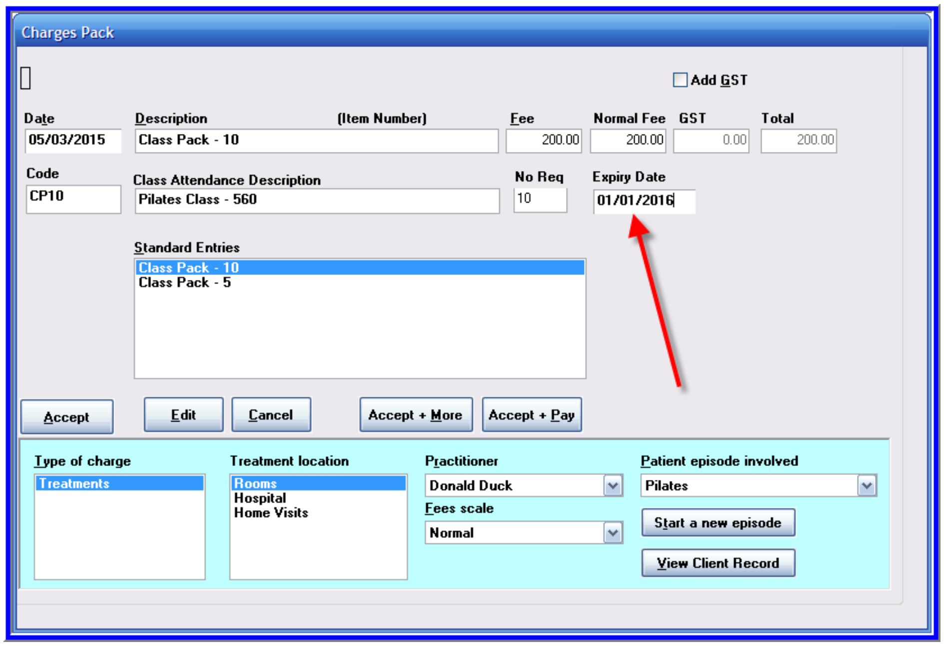
- Click Actions
- Pack Sale



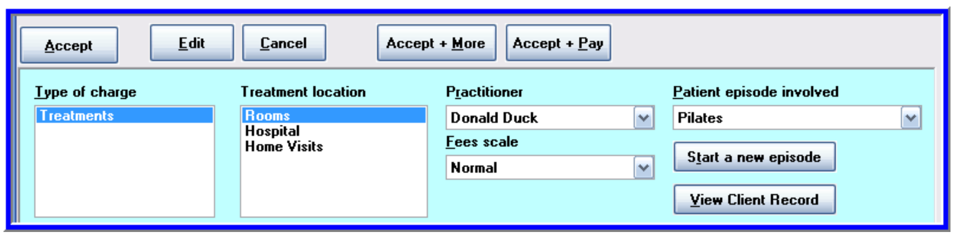
- Choose a Client
- Select the appropriate episode



- Click OK

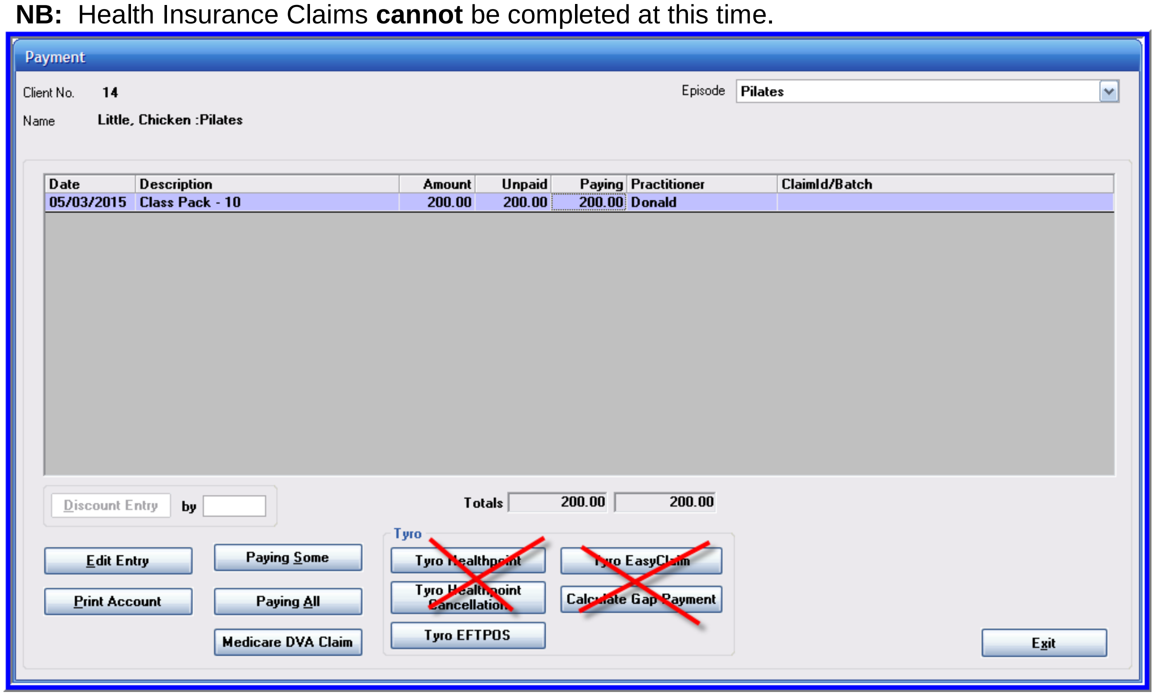


- Select the Pack from the available packs list.
- Enter an Expiry date (This is optional)



- 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

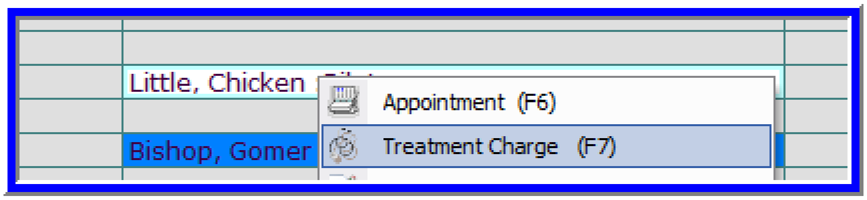
NB: Health Insurance Claims **cannot** be completed at this time.



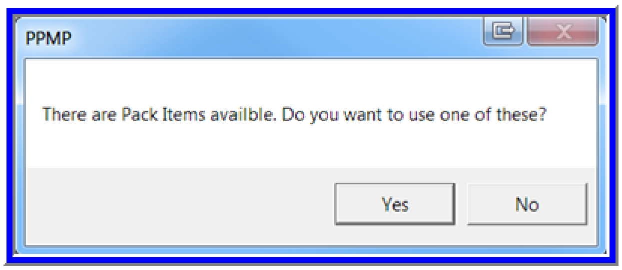
13.5 Using pack items

To use one of these items

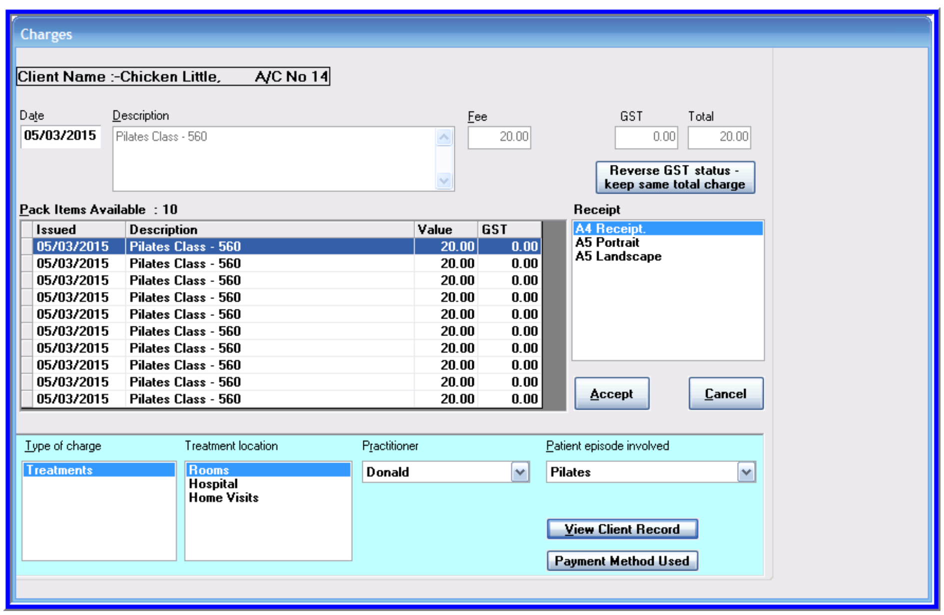
- Select client appointment on the diary (make sure the appointment has been made using the correct episode/payment method).



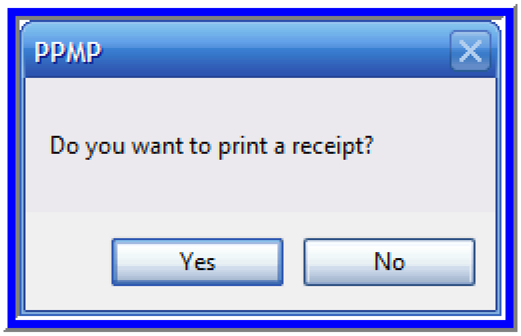
- Click Actions or Right Click
- Click Treatment Charge



- Click Yes



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

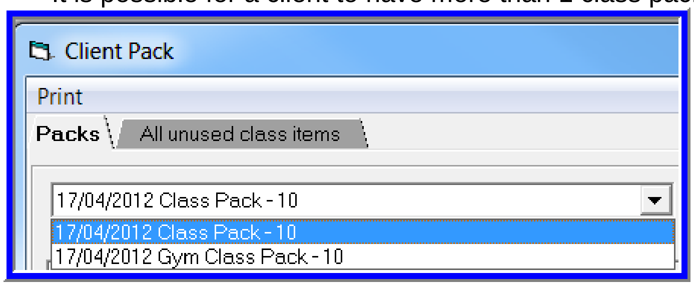


- **Click Yes**

(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

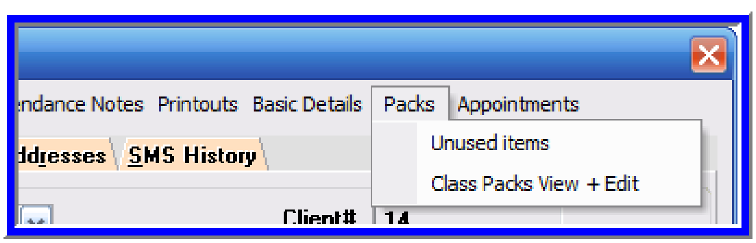


- If you want to use a particular unused pack item scroll down the Pack Item list and click on the particular item you want and click Accept

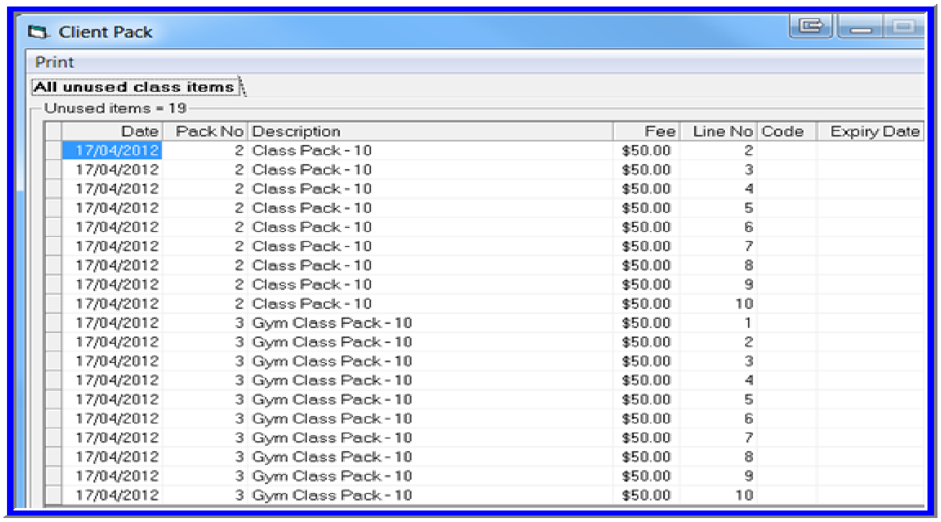
- You might need to do this where you have sold multiple packs such as normal Class and Gym class. The system might pre-load a normal class item when you want a Gym class item.

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

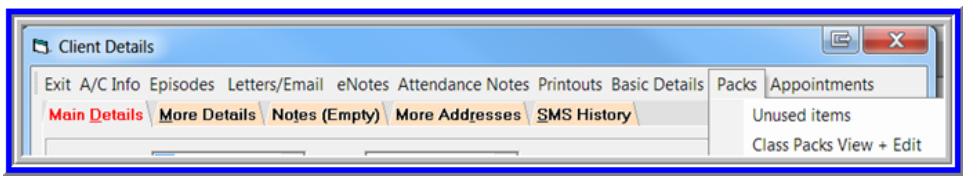
13.7 Viewing client usage & status



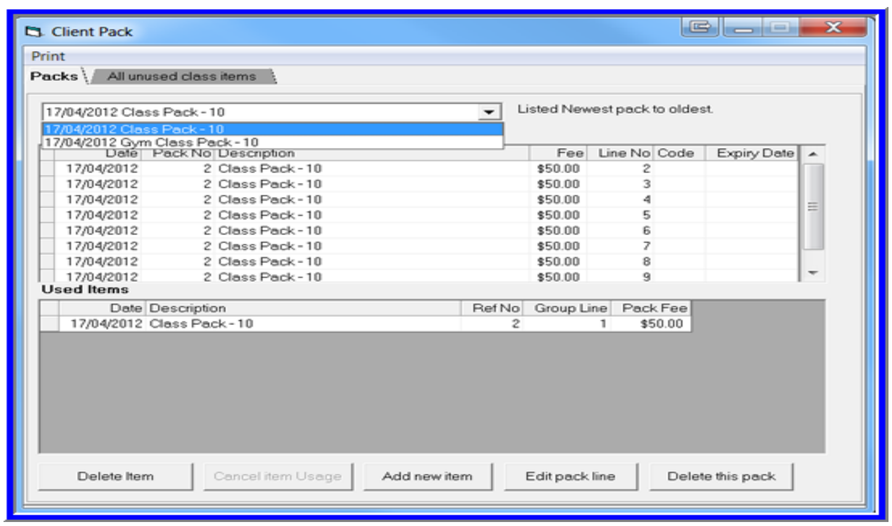
- Go to the client's record
- Click on Packs on the menu
- Choose "Unused items"



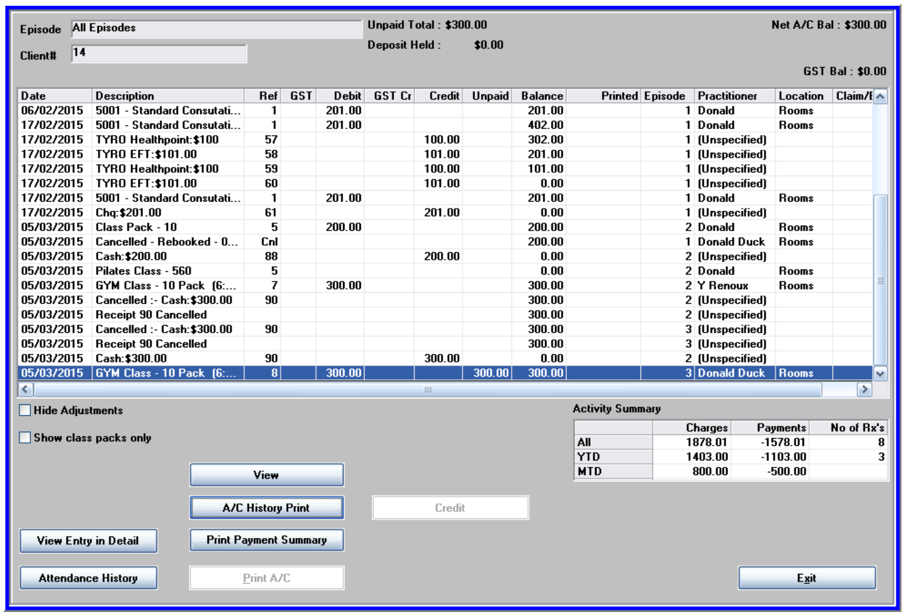
- Brings up all unused items available for use



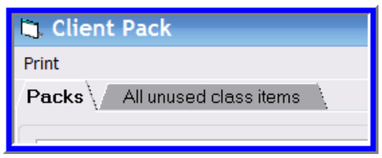
- Alternatively Click Class Packs View & Edit



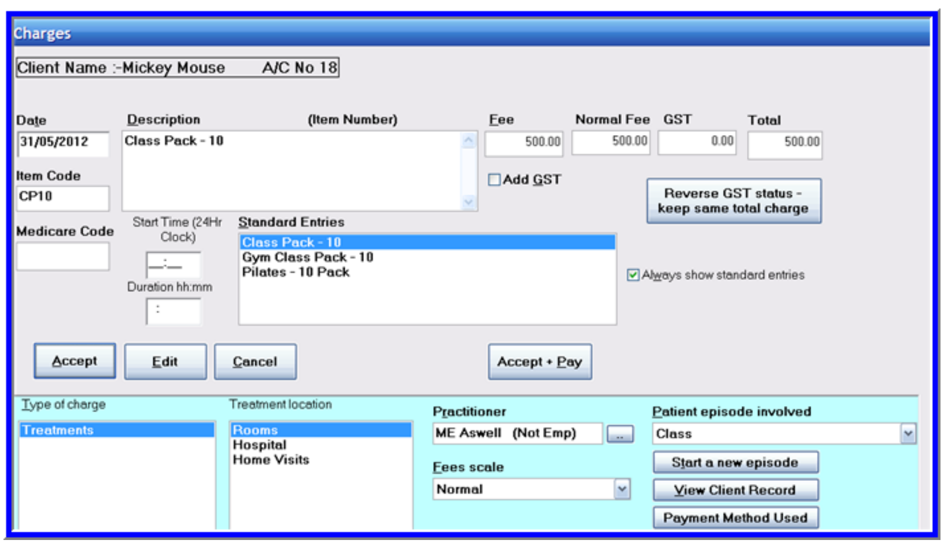
- You have full access to all the packs and be able to adjust or change them



- 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



- 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



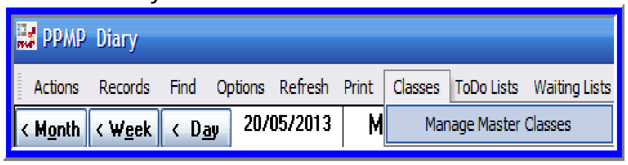
As you try to treatment charge, a new class pack will be available to select

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.

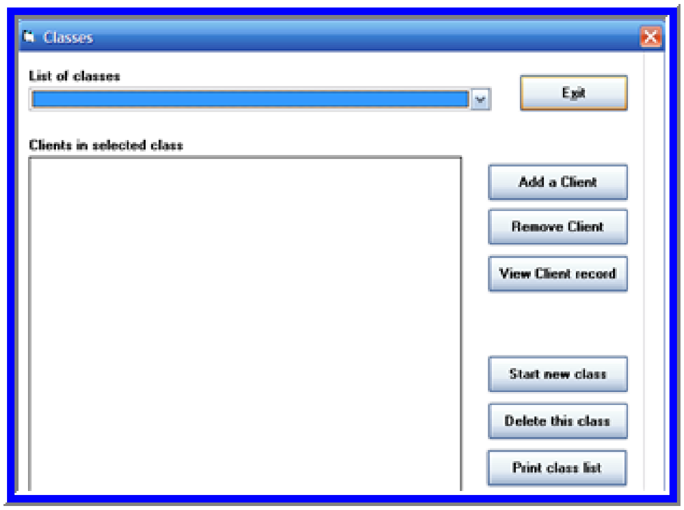
And after the sale return to the Diary and charge as usual

13.8 Classses – Setup new class

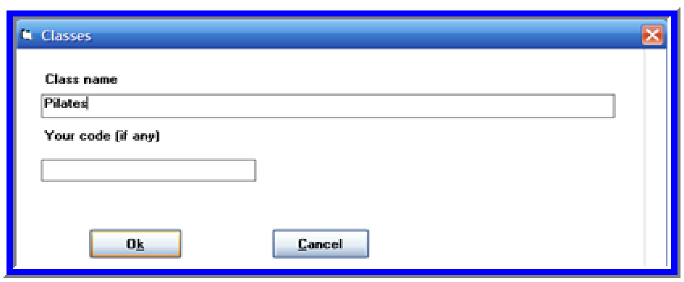
From the diary



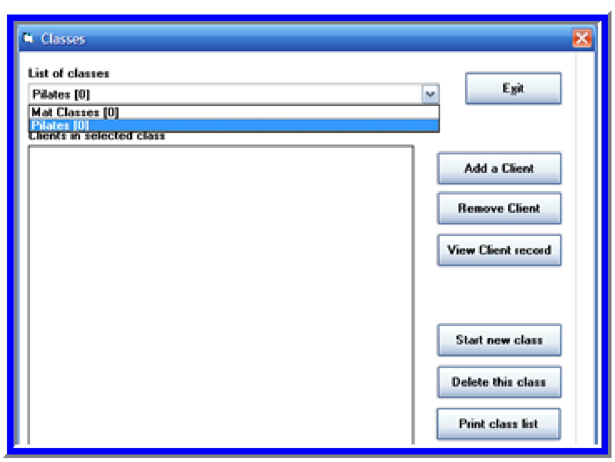
- Click Classes
- Manage Master Classes



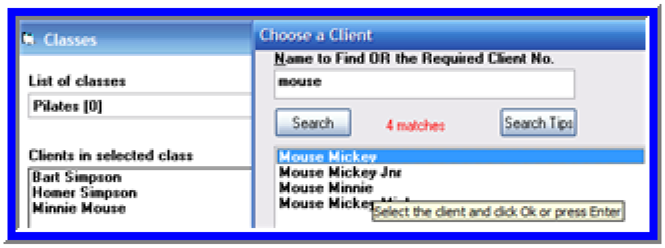
- Click Start New Class



- Give Class a Name – Click OK



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



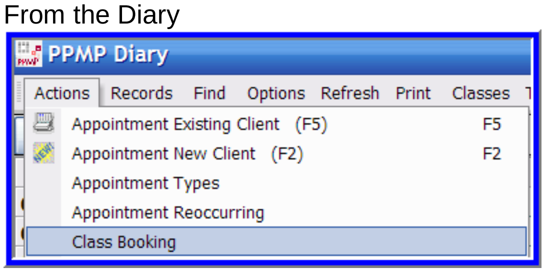
- Select Client & Click OK

- When you have finished adding clients - Click Exit

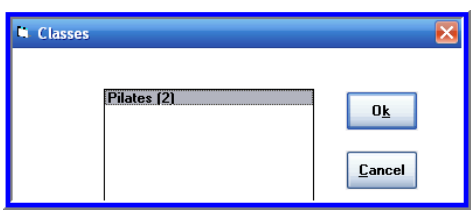
13.9 Classes – Make class appointments

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

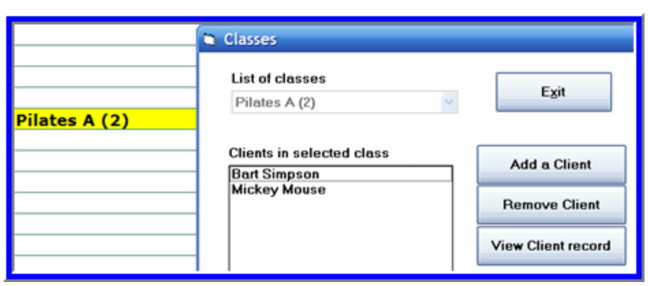
From the Diary



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

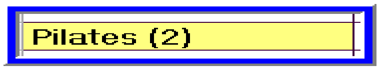


- Select the class
- Click OK



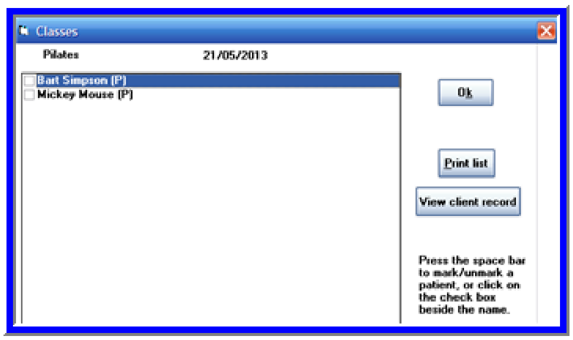
- The number in brackets indicates how many people are in the class

13.10 Classes – Treatment charges

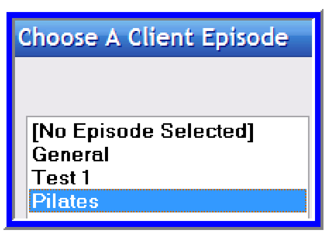


- Highlight class – the number indicates how many booked in the class

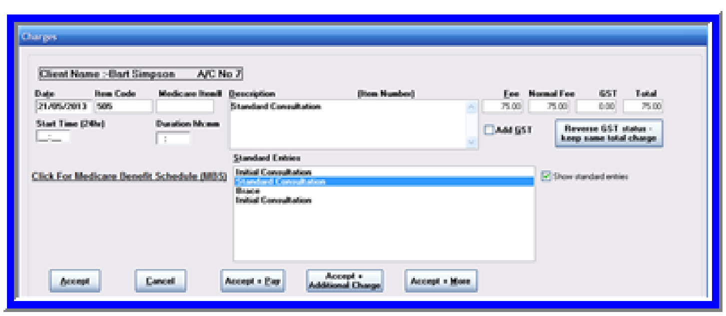
- Click Actions or Right Click
- Click Treatment Charge



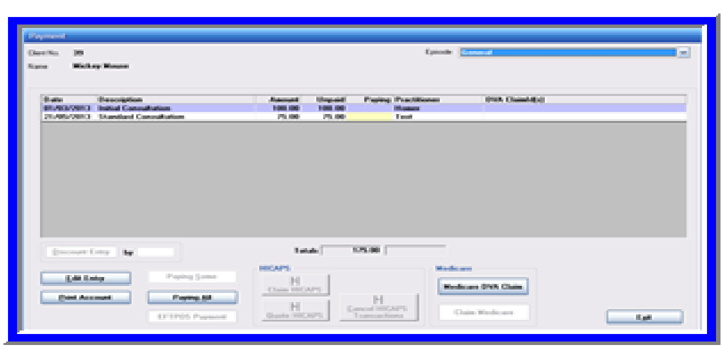
- Click in the box next to name



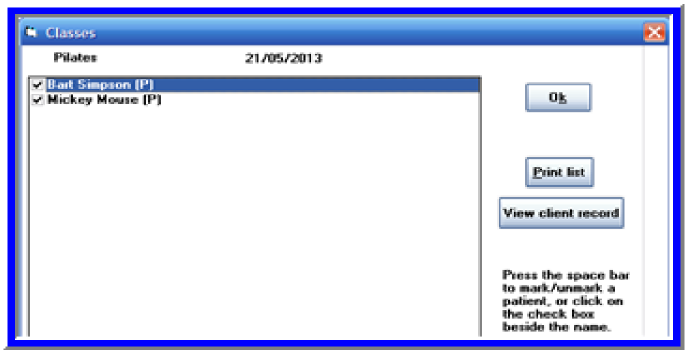
- Select episode (if prompted)



- Click Accept

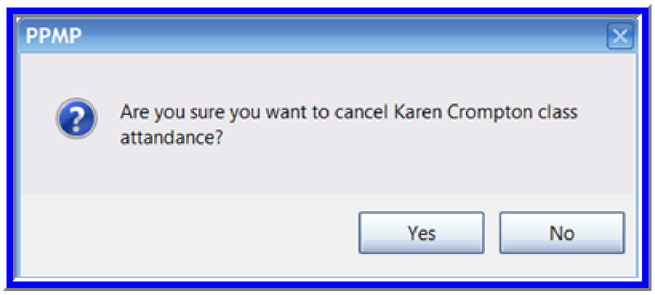


- Proceed with Payment as usual (if not paying Click Exit)



- 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

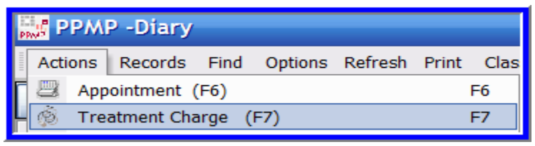
14.1 Adding a new client to the computer

Click HERE to watch video

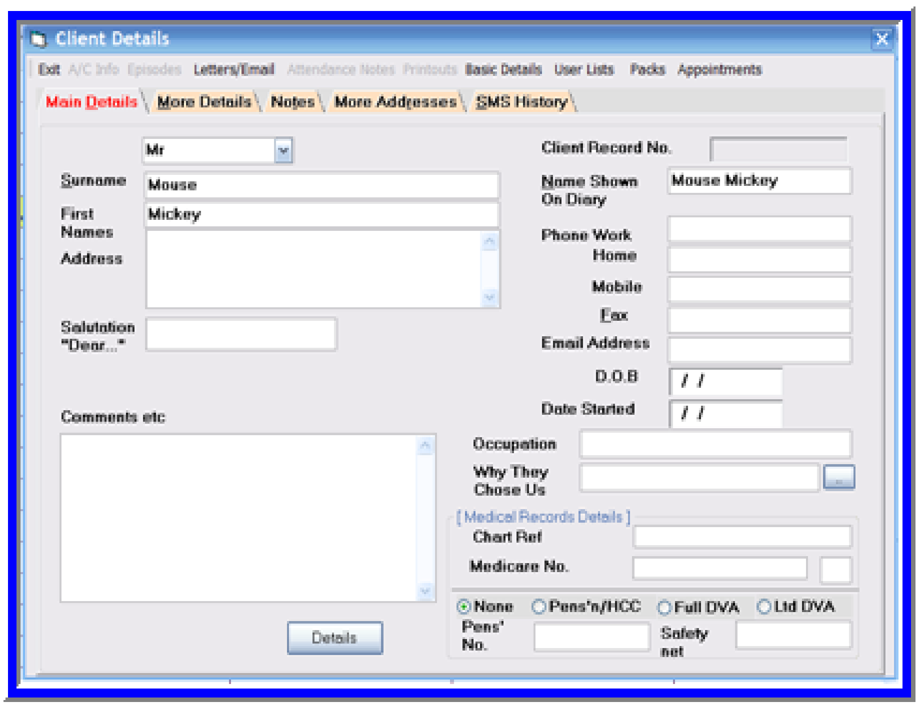
A new client can be added to the system in four ways.
This is the most common approach, (the program detects that they are a new patient and requires their details to be entered before continuing)

The First Option

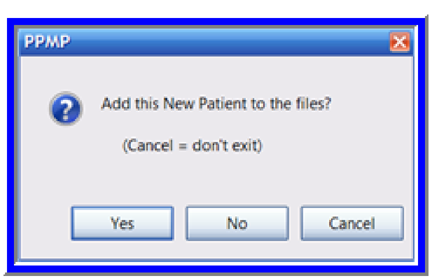
- Click on the appointment for a new client on the diary



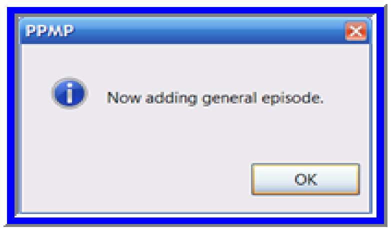
- Click Actions
- Click Treatment Charge



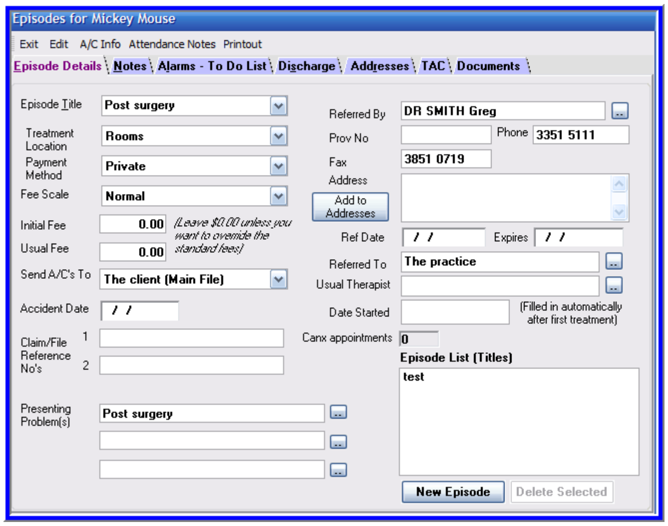
- Fill in client details (see – Entering Client Details below)
- Click Exit



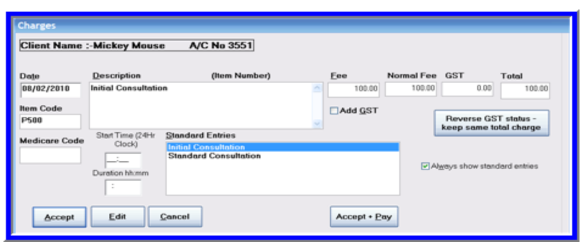
- Click Yes



- Click OK



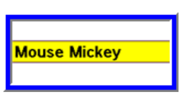
- Fill in the episode details
- Click exit
- Save the changes



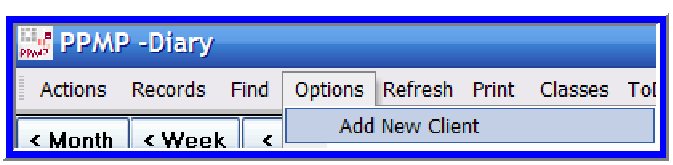
- Proceed with the treatment charge

<u>The Second Option</u>

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.

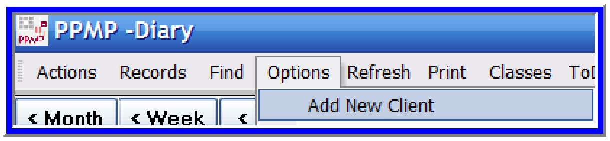


- Selecting the New Patient's appointment on the diary.



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

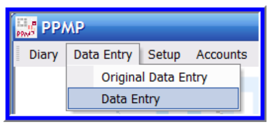
The Third Option
Without selecting a new patient's appointment.
From the diary



- 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

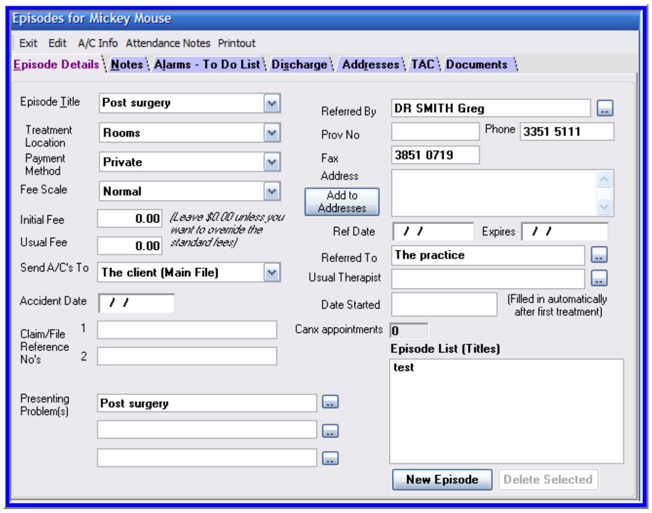
Click HERE to watch video

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

MAIN RECORD

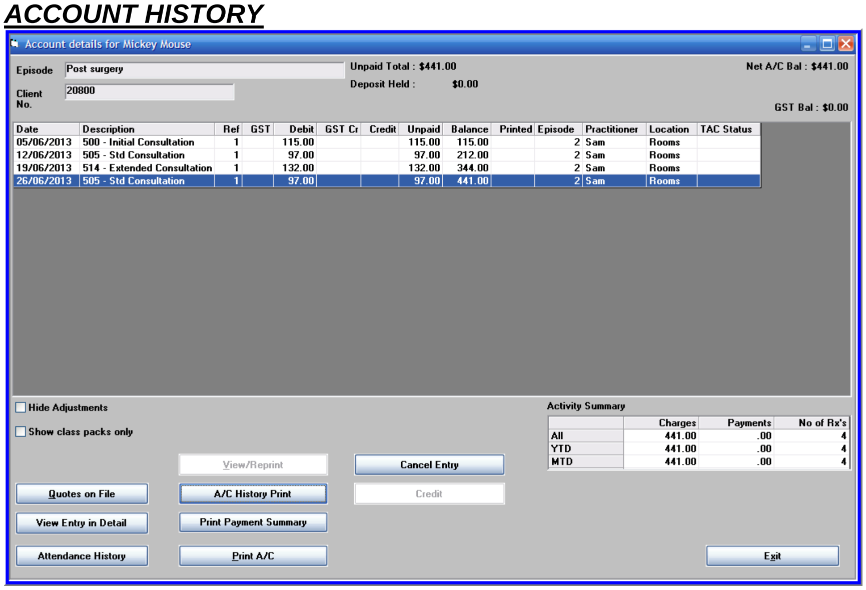
- Their main Client Details such as Name, Address, DOB. Contact phone numbers, etc.

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



- 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.

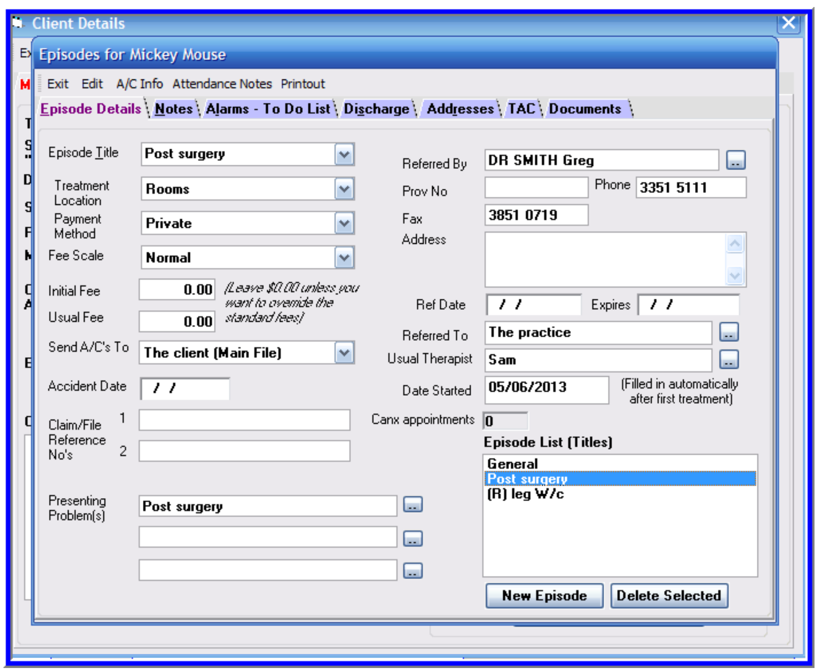
You will find it frustrating if you use the automatic print accounts option only to find many of them don't have an address on them.

- Client's main record screen

- There are several pages to record extra information like names and other addresses, notes, etc.

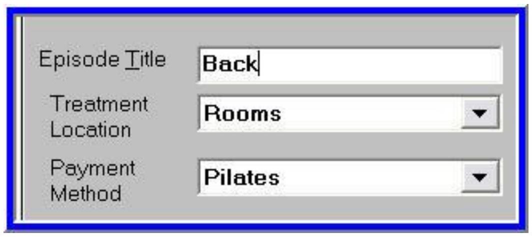
You can also access the patient's episode details and account history from here.

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

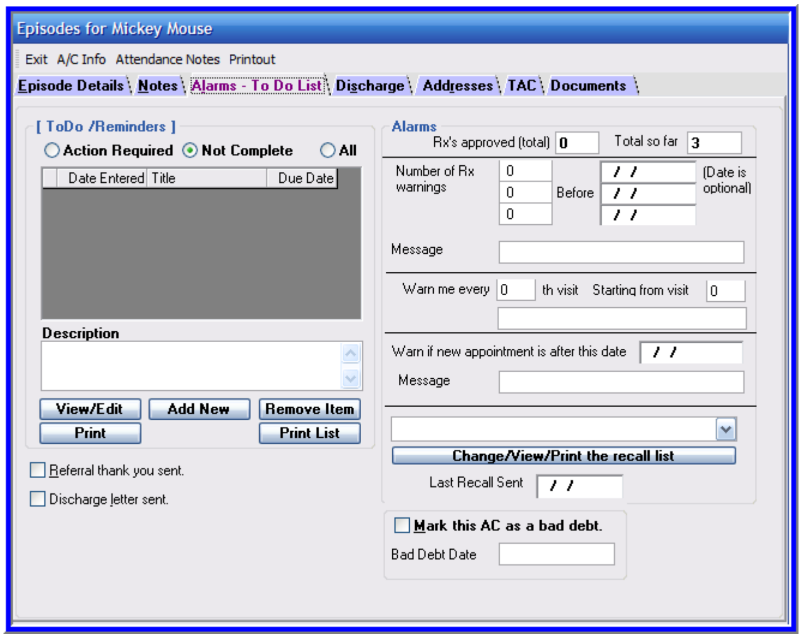
- Click on Start a New episode

- **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.

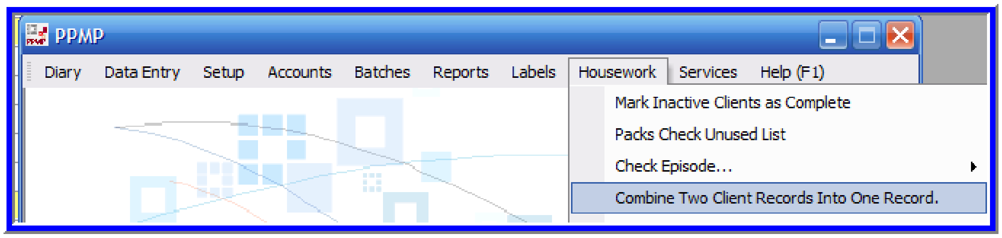


- **Alarms By number of treatments** - If you enter a number of approved treatments, the client's appointments will display in a different color with a number in brackets – this number indicates the amount of treatments left before they reach their approved number of treatments.
- If you also include a date then the number of treatments must occur by this date.

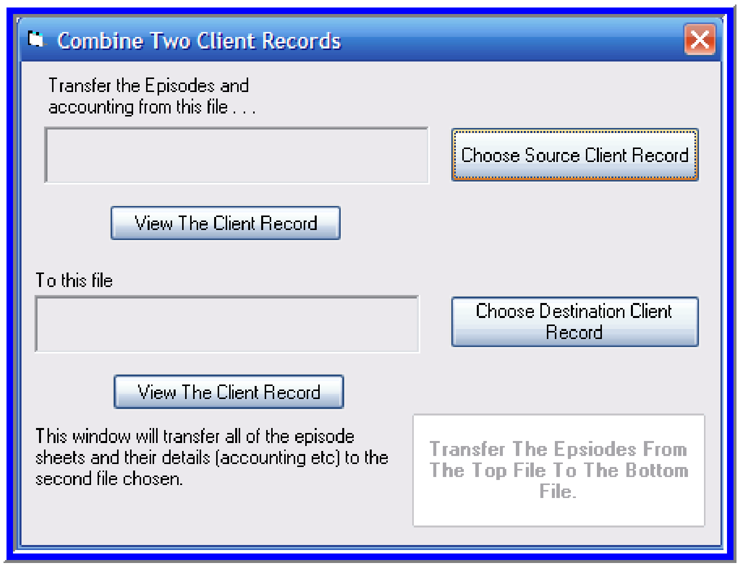
- The appointment alarm window will appear when appointments are made after this date and the client's name will show up on a red background when an appointment for them is made on the diary.

15 Combine 2 client records into one

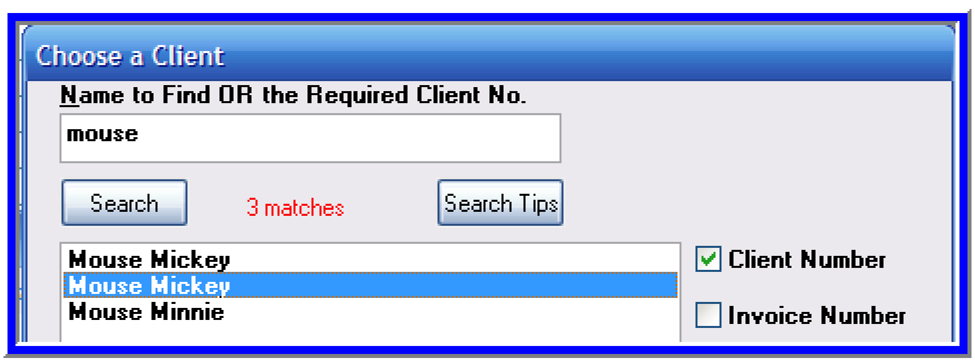
On PPMP Main Screen



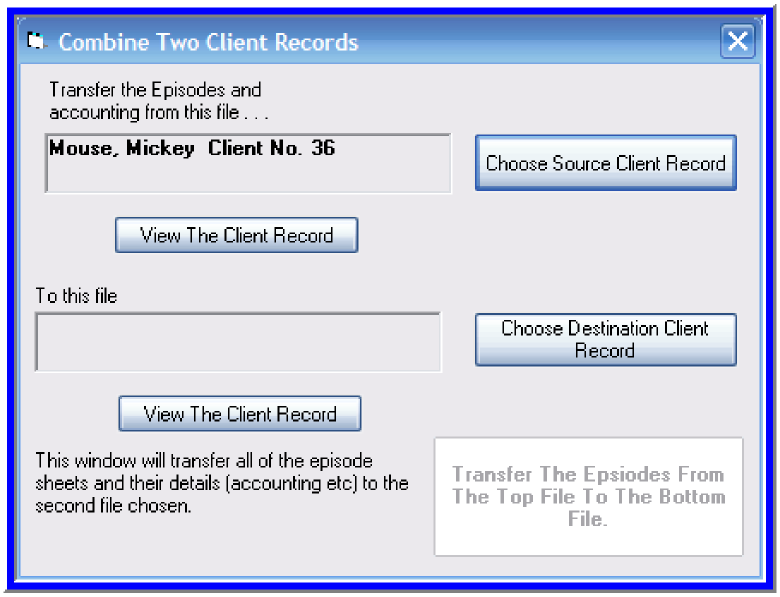
- Go to Housework
- Click on Combine Two Clients Records into One Record



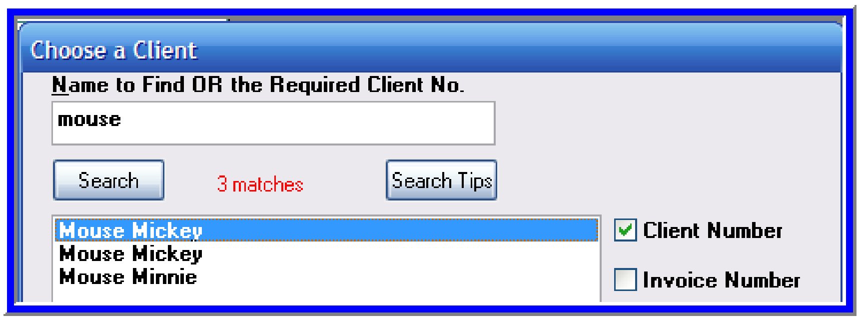
- Click on Choose Source Client Record



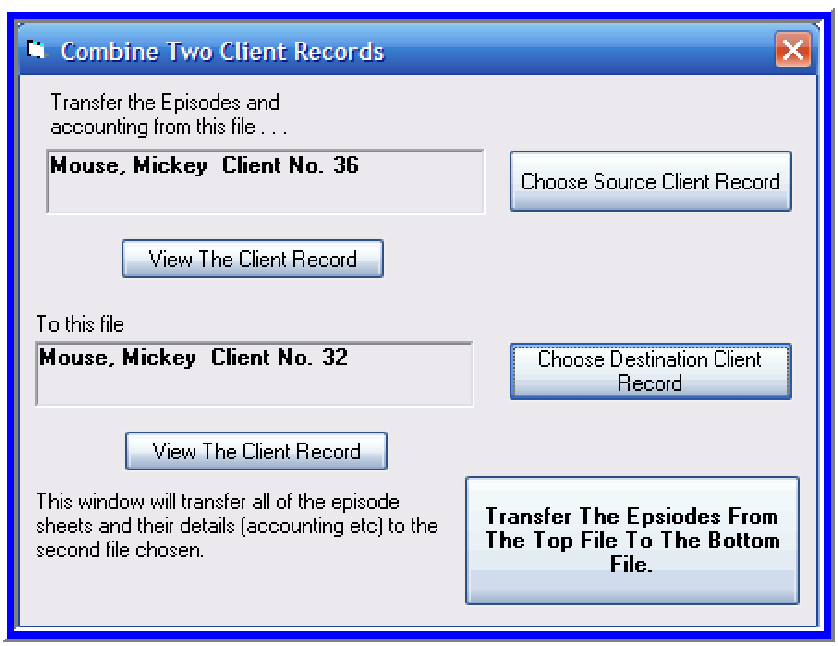
- Select the file to transfer **FROM**



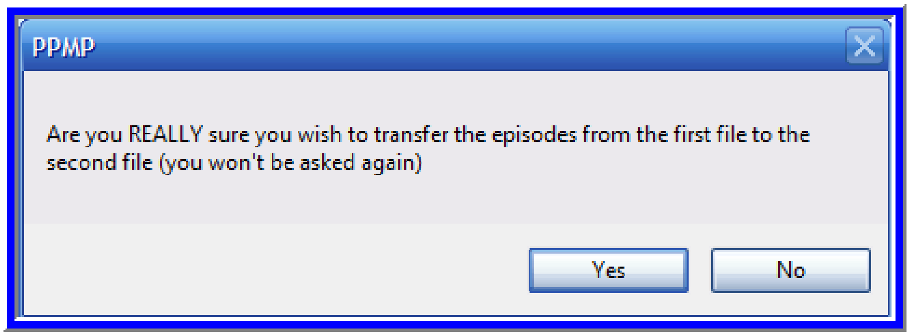
- Click Choose Destination Client Record



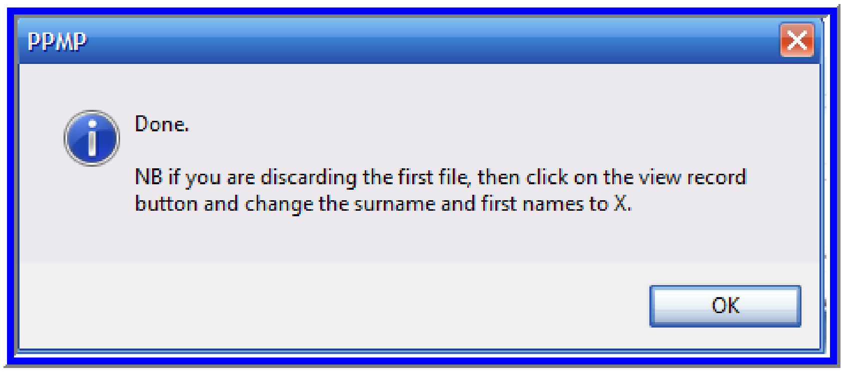
- Select the file to transfer **TO**



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

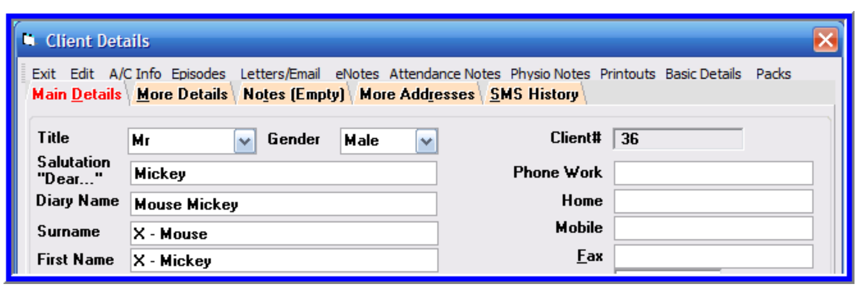


- Click Yes if you are sure (**ONLY IF YOU ARE VERY SURE** – this stage cannot be reversed)



- Click OK

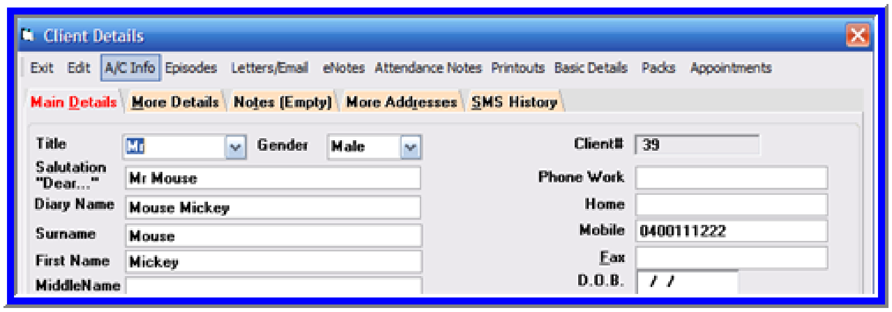
- Click on View the Client Record



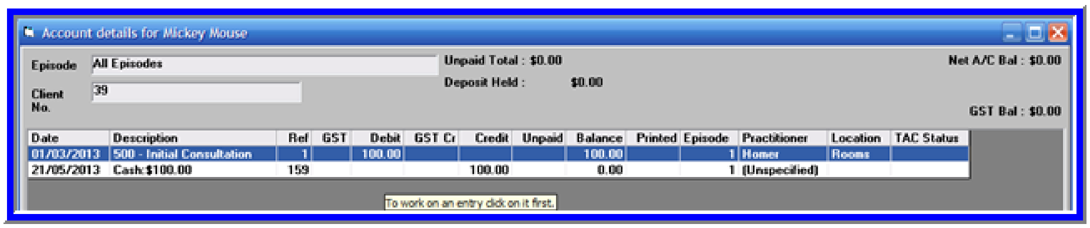
- Insert X before Surname/Firstname (you can remove the surname/firstname and just leave X)
- Click Exit and Save Changes

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

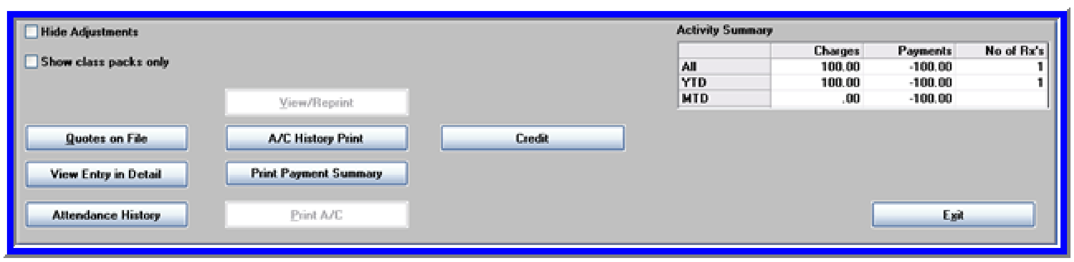
16 Credits / Refunds



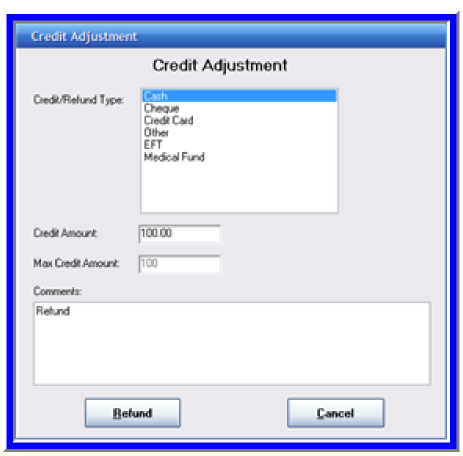
- Open Client Details Screen
- Click A/C Info



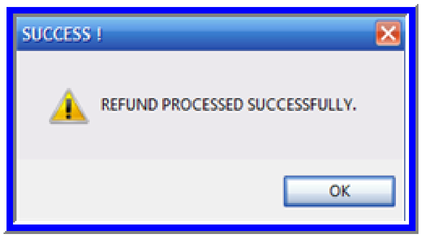
- Click on the Treatment Charge



- Click Credit Button



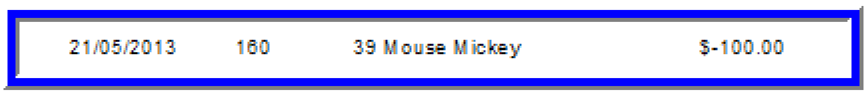
- Select Credit/Refund Type
- Enter amount being refunded
- Enter comment relating to refund (e.g. why it is being refunded)
- Click Refund



- Refund Processed Successfully
- Click OK
- Exit

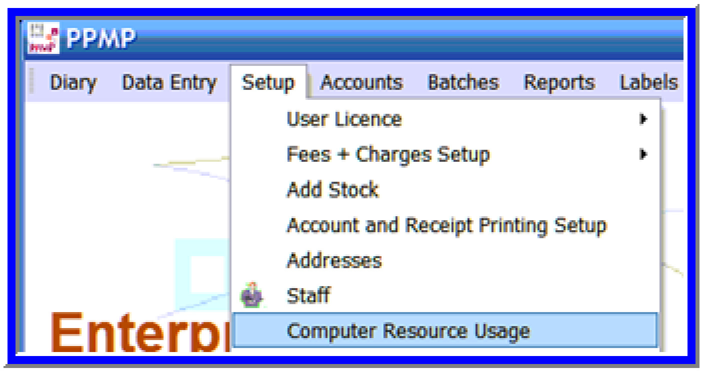
Date	Description	Ref	GST	Debit	GST Cr	Credit	Unpaid	Balance	Printed	Episode	Practitioner	Location	TAC Status
01/03/2013	500 - Initial Consultation	1		100.00				100.00		1	Homer	Rooms	
21/05/2013	Cash:$100.00	159				100.00		0.00		1	(Unspecified)		
21/05/2013	PAYOUT : $100.00, Refu...	CRD				100.00		(100.00)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

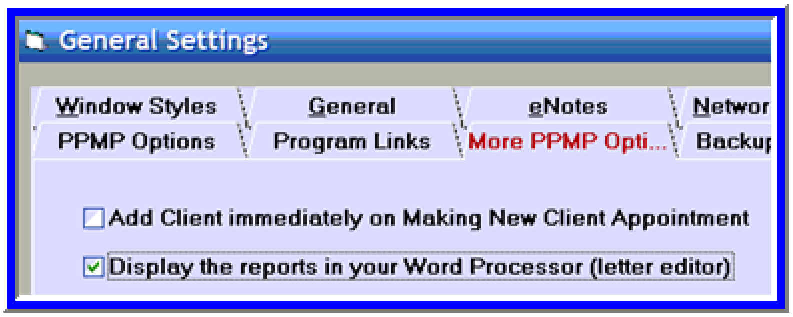


- All reports show negative / refunded amounts

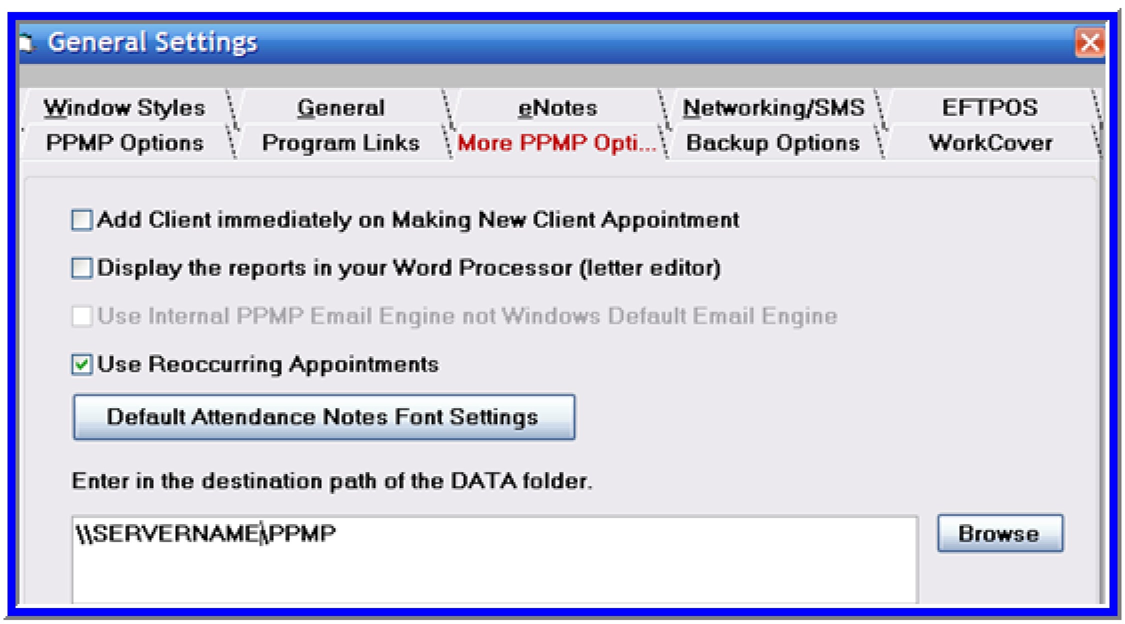
17 Data path



- Go to Setup
- Computer Resource Usage



- More PPMP Options

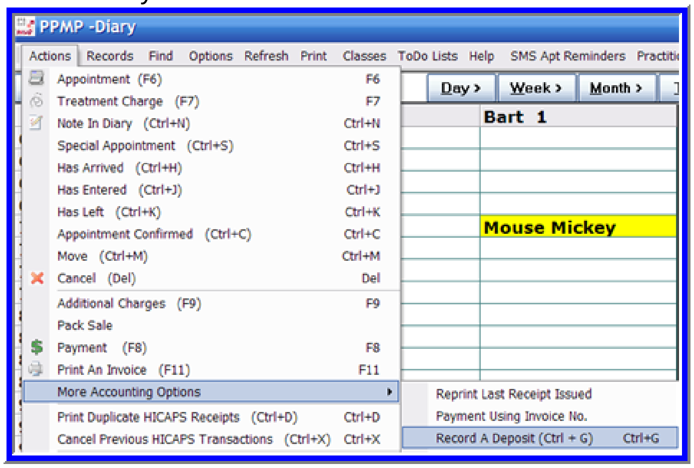


- Make sure the path is \\servername\PPMP) – Close PPMP & Reopen
- Same on all machines EXCEPT Server it stays as C:\Program Files\PPMP

18 Deposits

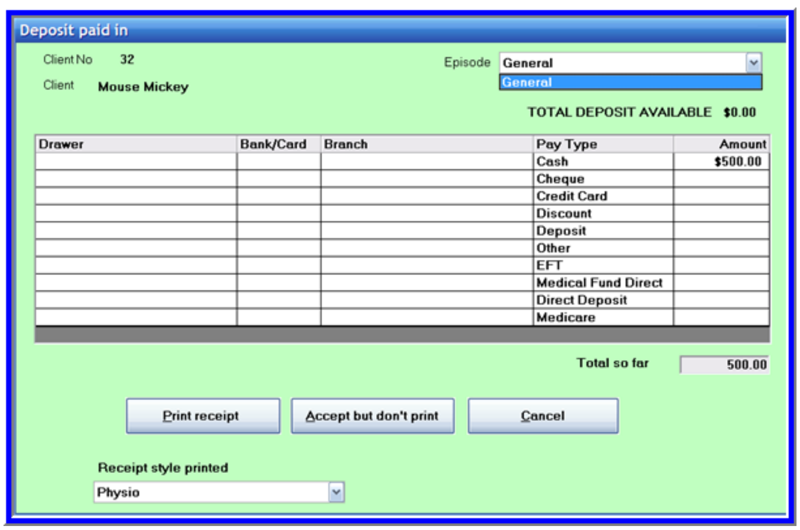
18.1 Recording a deposit

On the Diary screen



- Click Actions
- More Accounting Options
- Record a Deposit

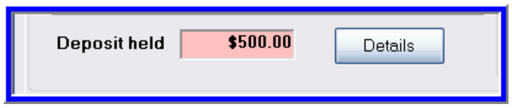
NB: If you have selected a client on the diary then this is where the deposit will be recorded – otherwise choose a client from the list.



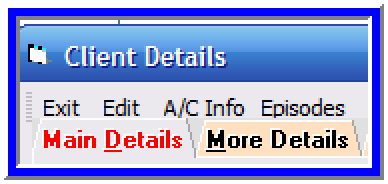
- Enter the amount being paid and how it was paid (cash, cheque, etc.)
- Select the Episode

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

Open up the client's details screen

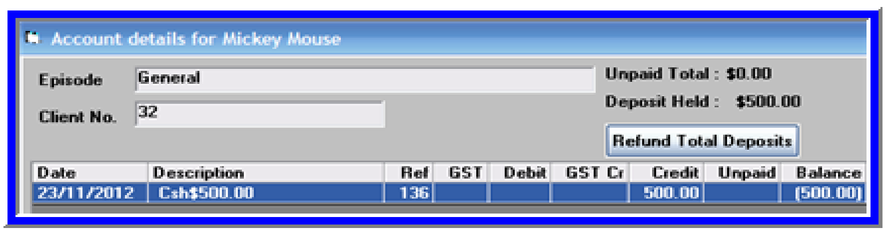


- Bottom right you will see “Deposit Held”
- Click on Details to view Episodes deposit is related to
- Check the Account Info screen is displaying the correct information



- Click Episodes

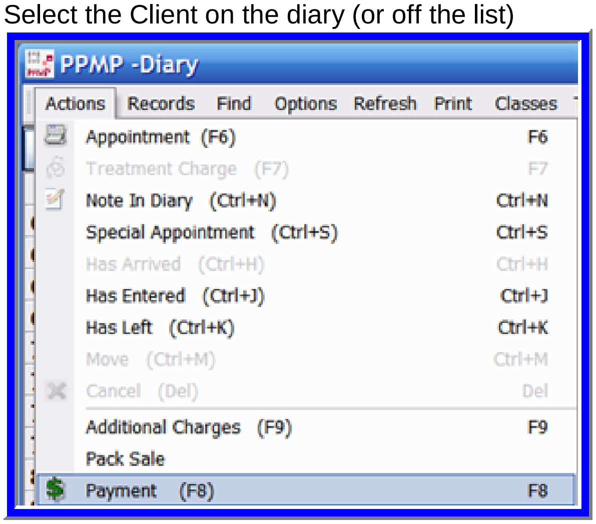
- Click A/C Info



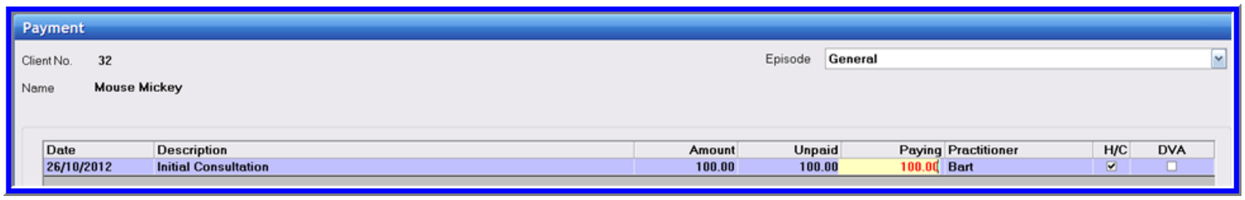
- Make sure Balance is in brackets.
- Charge the client in the usual way

18.2 Payment using deposit

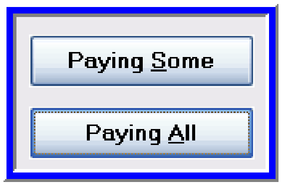
Select the Client on the diary (or off the list)



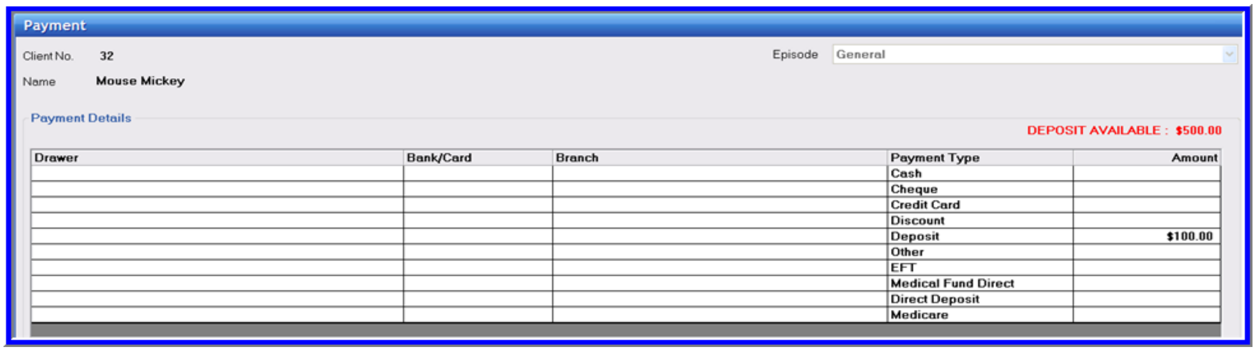
- Click on Actions
- Click on Payment



- Enter amount being paid

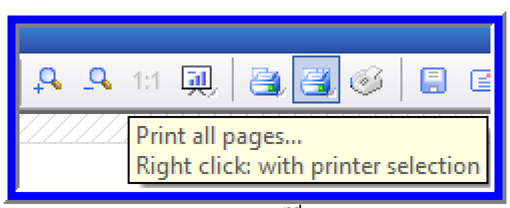


- Click Paying All (or Paying Some)

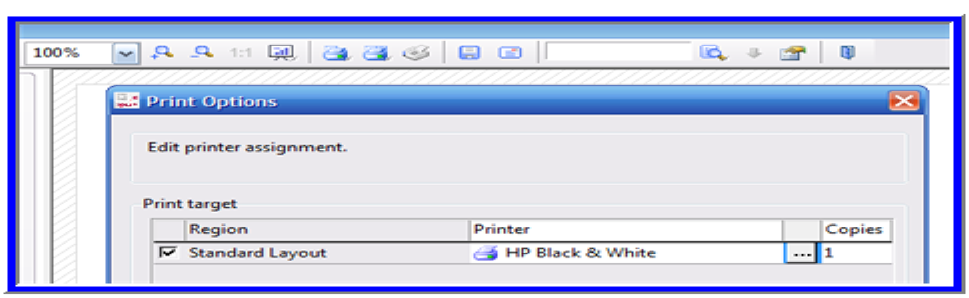


- Click in Amount Column and select **DEPOSIT**
- Enter in the Amount

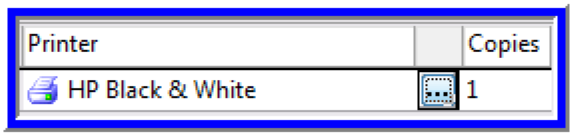
- Choose to Print a receipt or Accept but don't print
- OR Tick Preview Report to display the receipt (if you wish to print to an alternate printer)



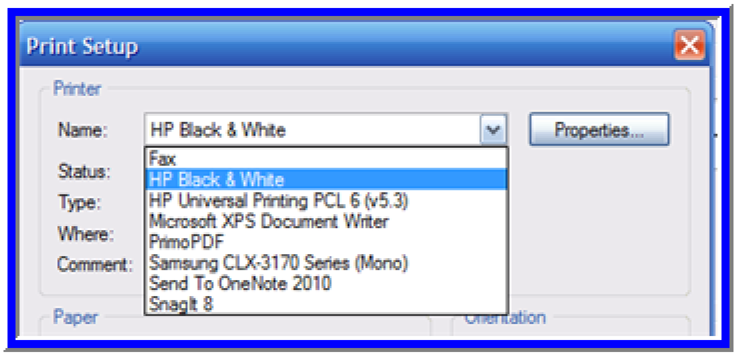
- Right Click on the 2nd Printer Icon



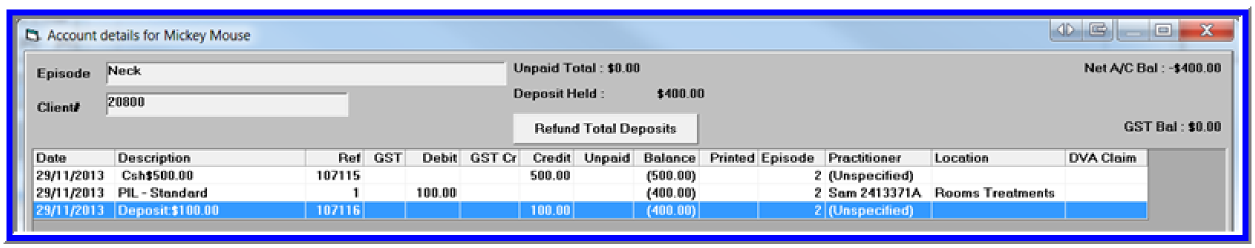
- Print Options Screen will enable you to change the Printer you wish to print to



- Click on the …Button



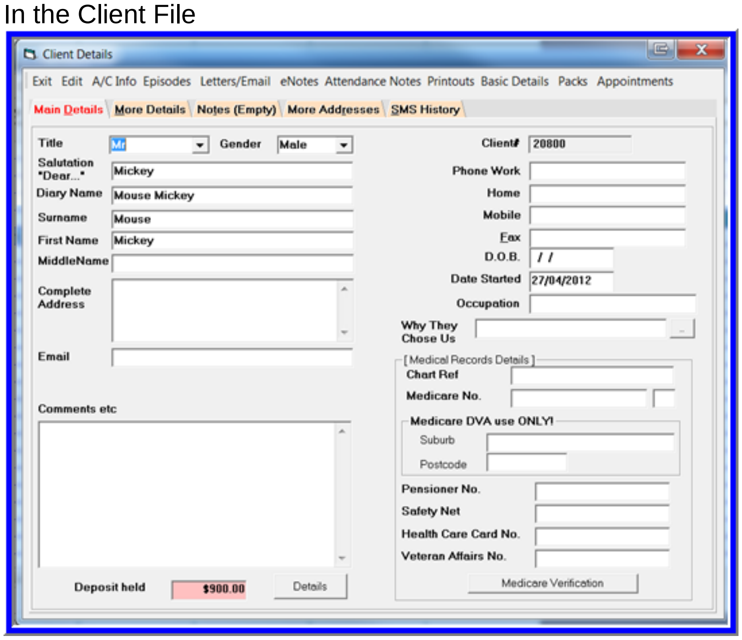
- Select your printer



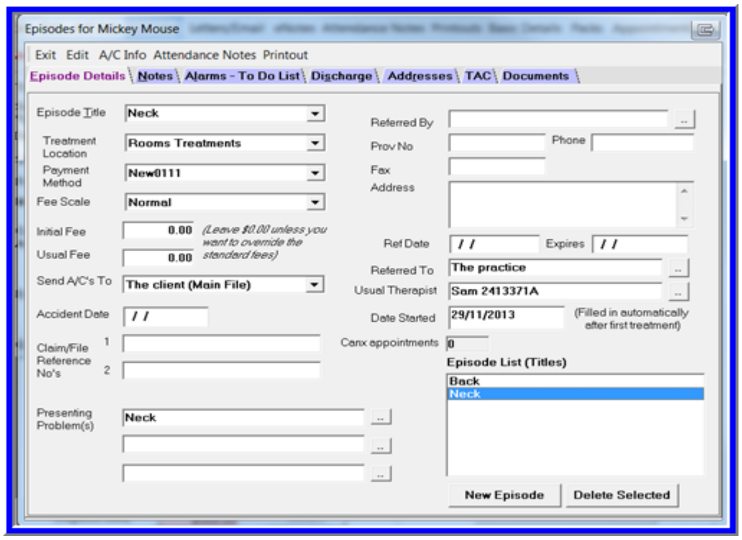
- Go back and display the account info screen (deposit held has decreased as has Account Balance)
- Also note the Refund Total Deposit button (if the account is not in balance this will not be available

18.3 Refund total deposits

In the Client File

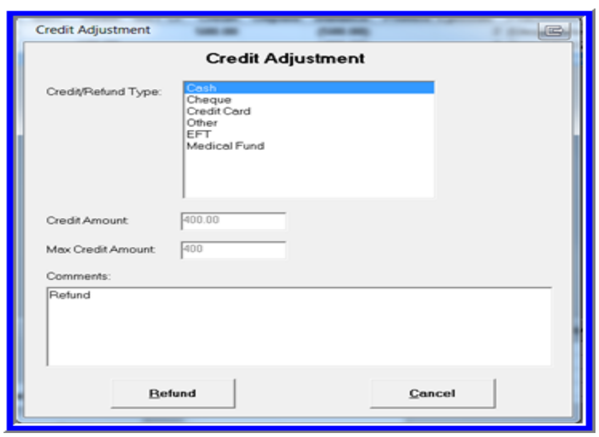


- Click Episodes tab

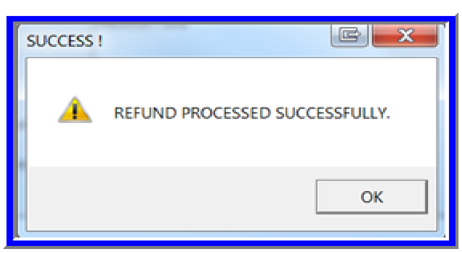


- Select Episode
- Click A/C Info

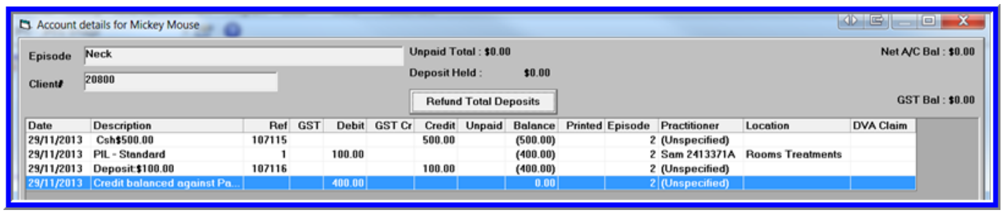
- Click Refund Total Deposits



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

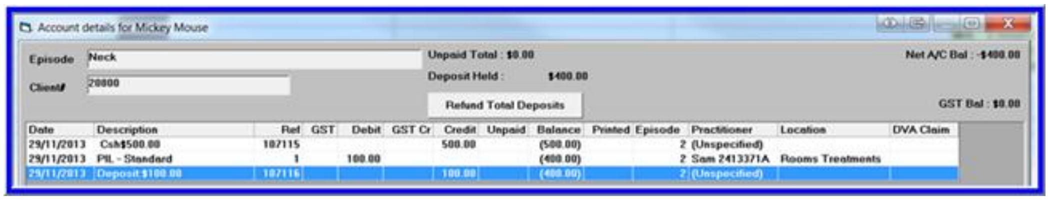


- Click OK

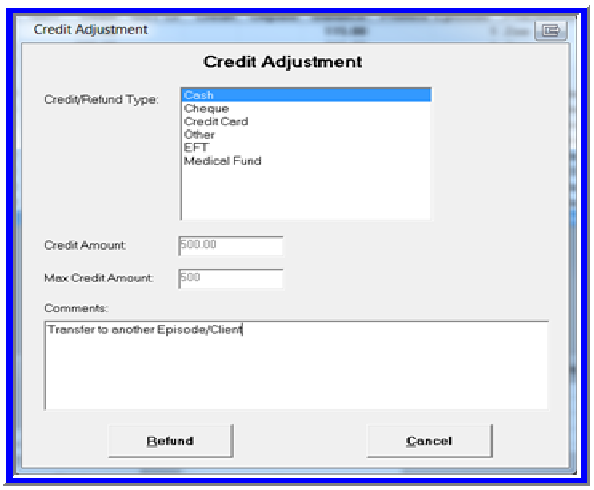


- Go back to Account info screen and check information recorded correctly

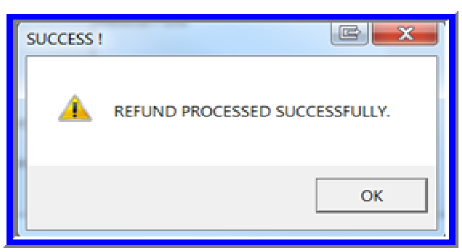
18.4 Transferring deposit to another episode



- Click Refund Total Deposits



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

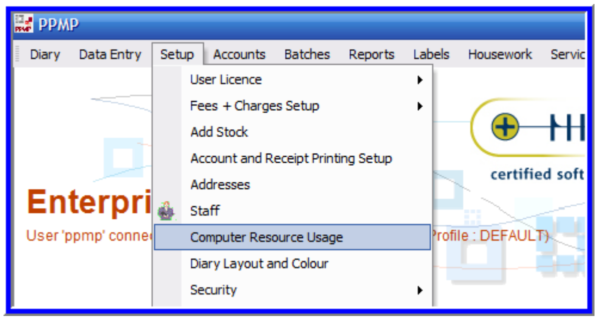


- Click OK
- You must then follow the Record a Deposit procedure to enter the amount into another Episode or on another client's files
- Your Banking report will then show a negative amount and a positive amount (cancelling each other out)

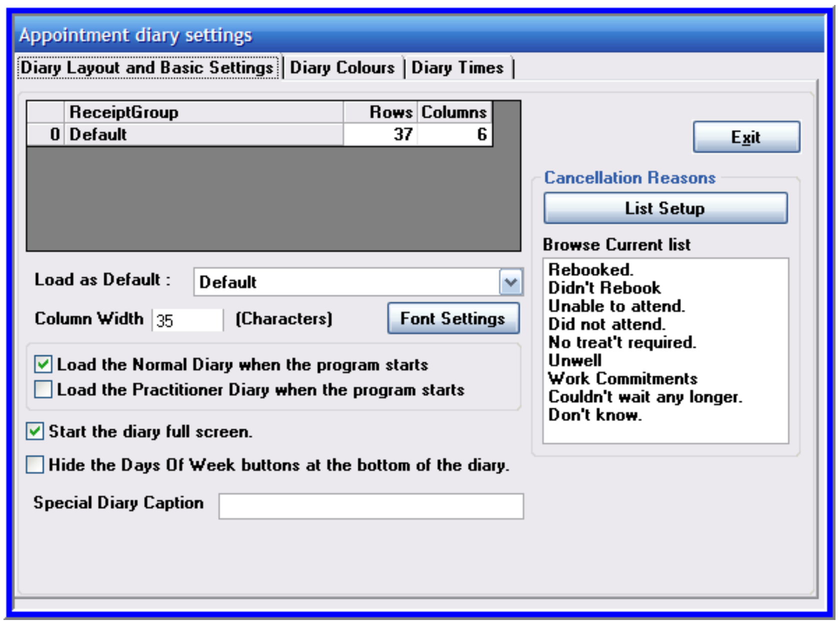
19 Diary layout & colour

Click HERE to watch video

From the main PPMP® menu

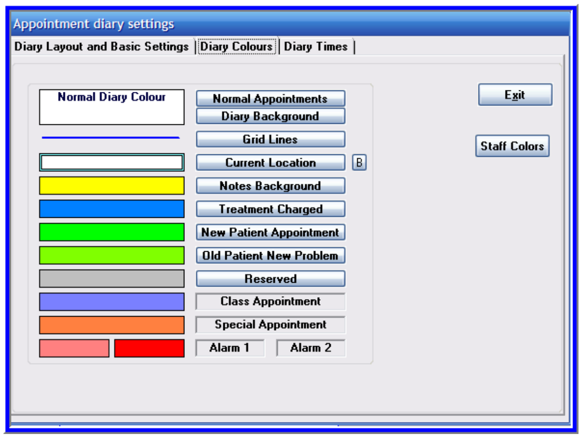


- Setup
- Diary layout and colour



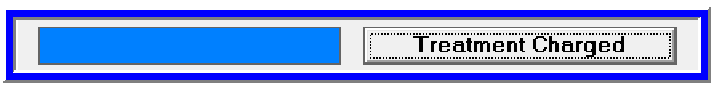
- This is where you set up your diary rows
- Columns
- Fonts

- 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



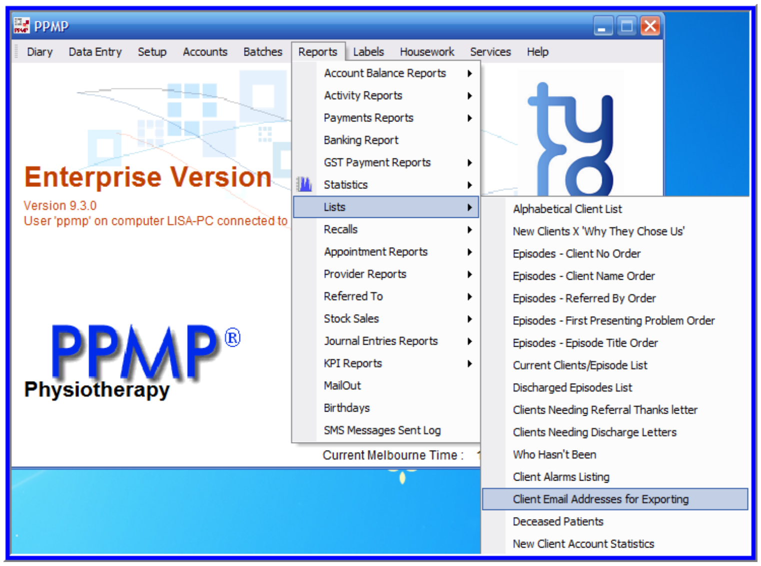
- You have selected BLUE for your Treatment Charged

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

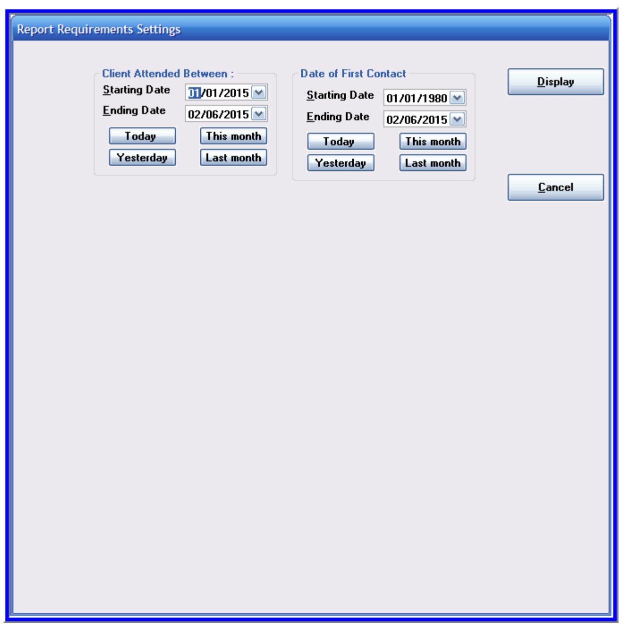
20 Emails

20.1 Exporting client email addresses

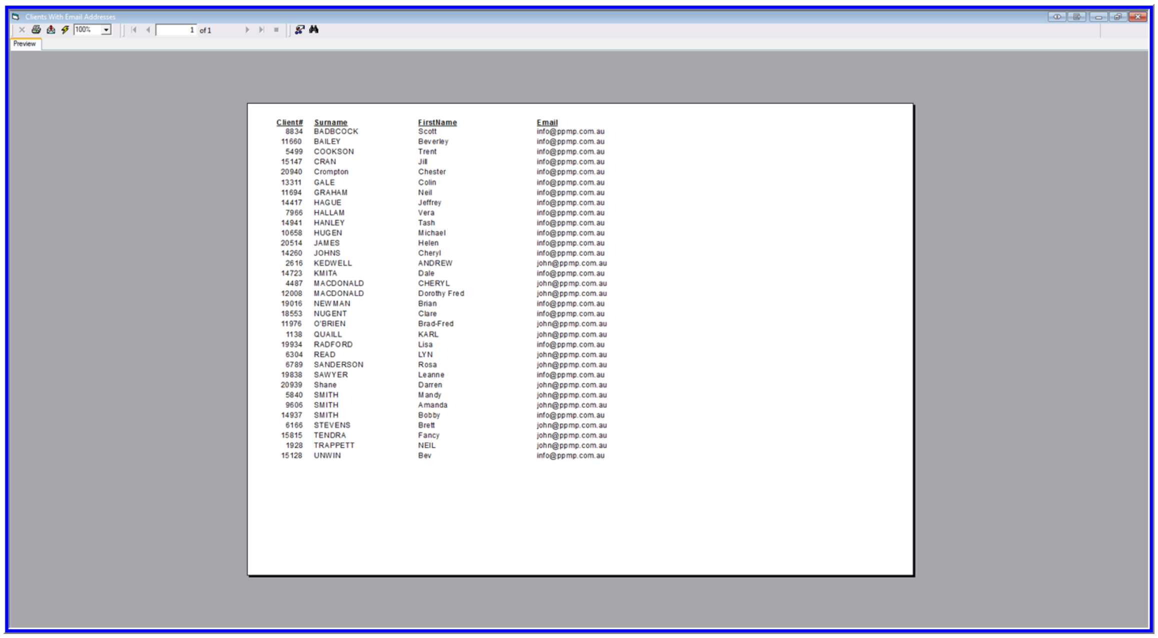
From the Main Menu of PPMP®



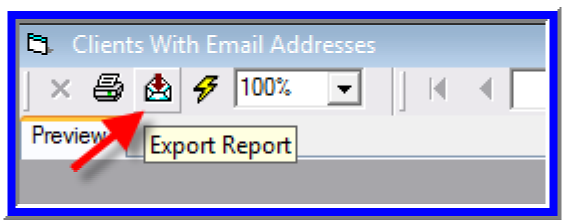
- Select Reports
- Select Lists
- Select Client Email Addresses for Exporting



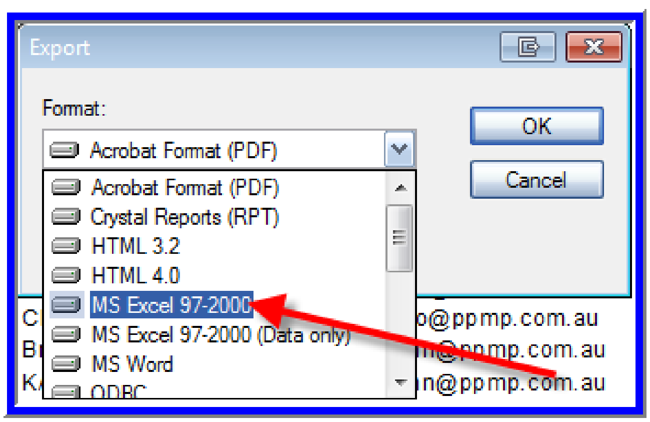
- Select date range (usually Client Attended Between date)
- Click Display



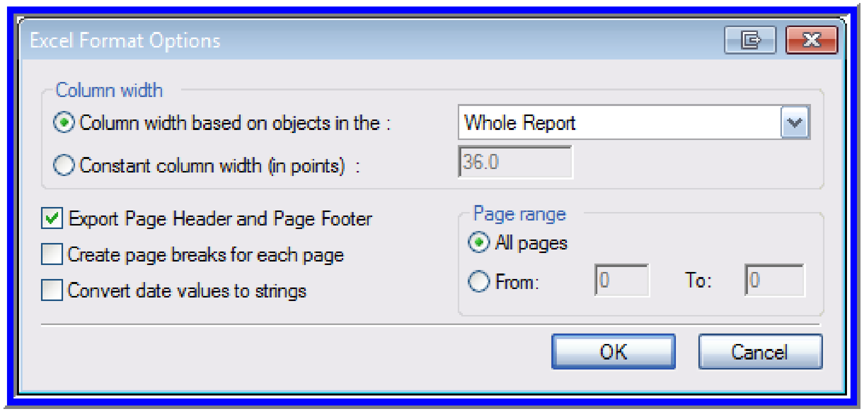
- The following screen appears



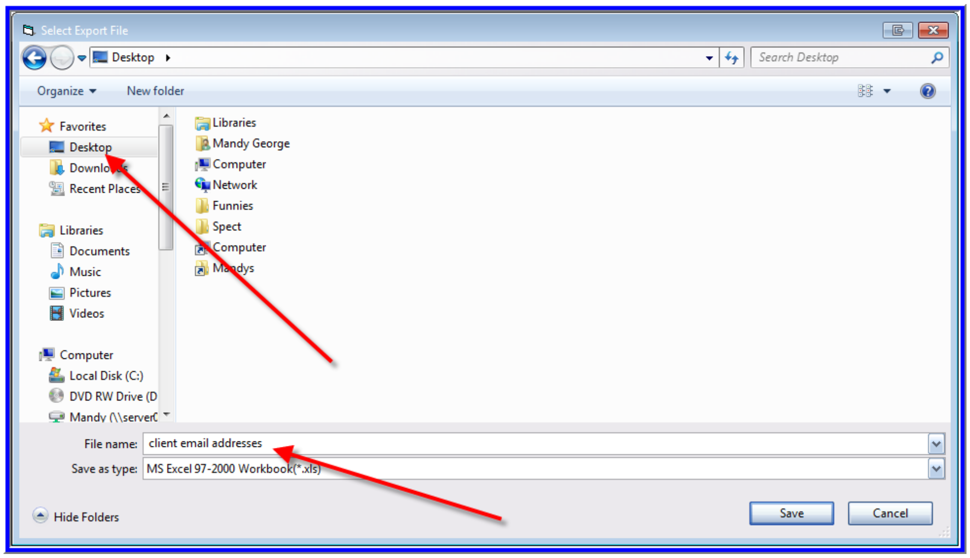
- Click the export icon



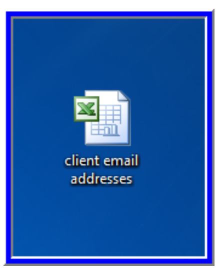
- Select MS Excel 97-2000 from the drop down list
- Click OK



- The following screen appears
- Click OK



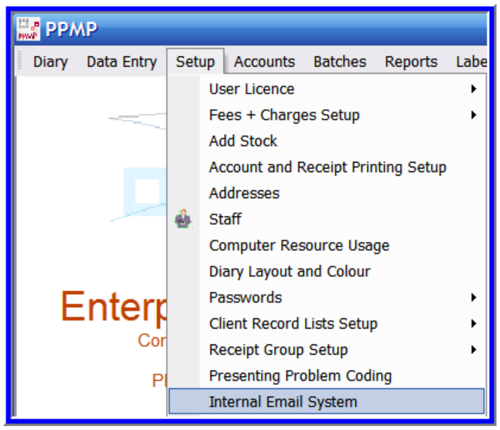
- Select Where you want to save the file
- Name the file to what you want
- Click Save



- 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



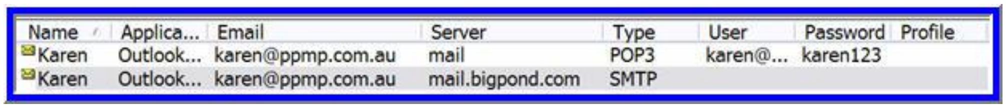
- Click Setup
- Click Internal Email System

- 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.

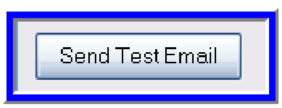


Name	Applica...	Email	Server	Type	User	Password	Profile
Karen	Outlook...	karen@ppmp.com.au	mail	POP3	karen@...	karen123	
Karen	Outlook...	karen@ppmp.com.au	mail.bigpond.com	SMTP			

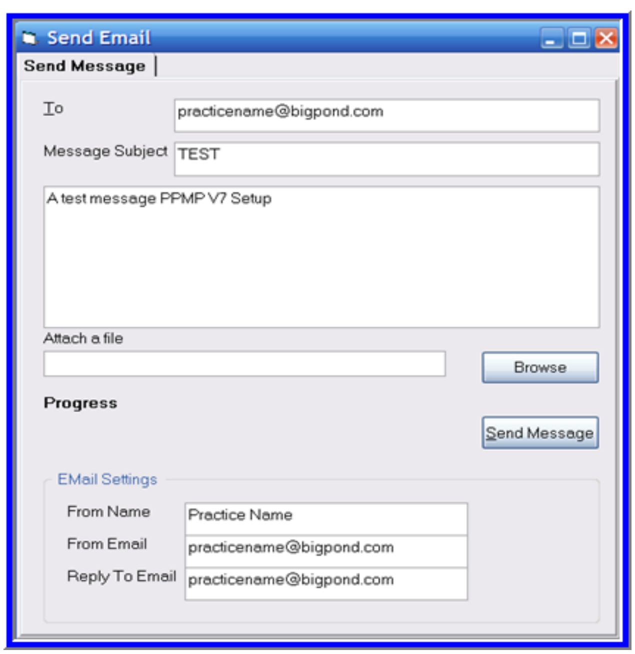
- Your email Address, SMTP Server & Password are displayed.

- Enter these into the required fields.

- Click Save



- Click Send Test Email



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

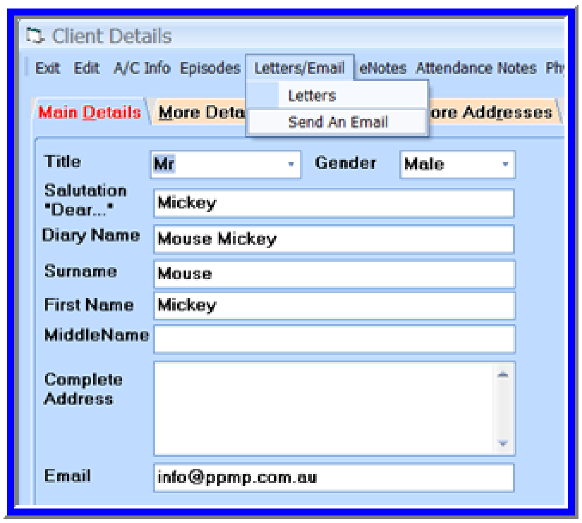
- Click Send Message

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

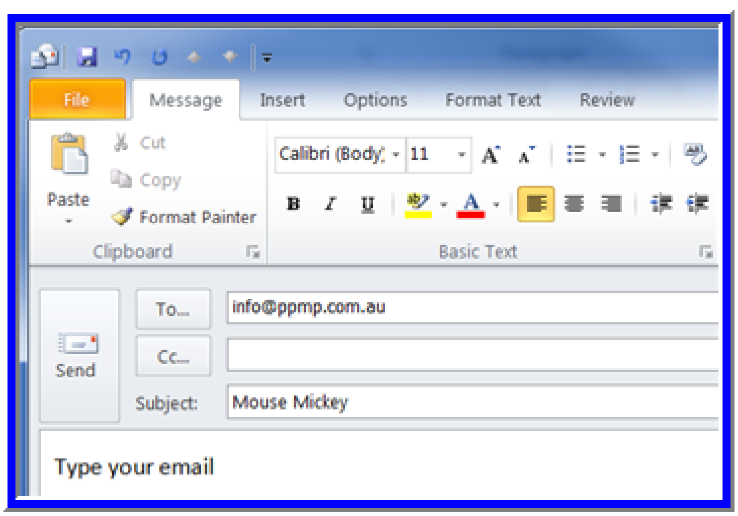
20.3 Sending emails (You can send individual emails or bulk emails)

Send Individual Emails

In the Client Details Screen



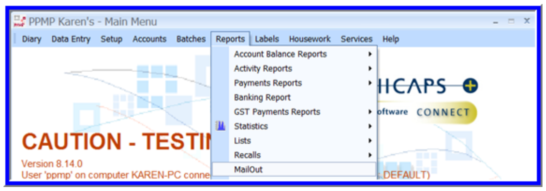
- Click on Letters/Email
- Click Send Email



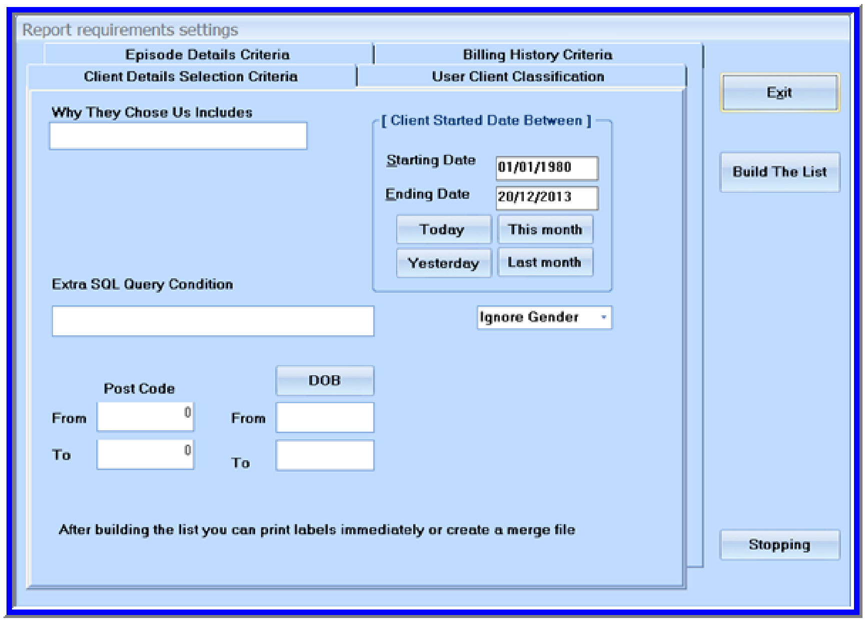
- Type your message and then
- Click send

20.4 Bulk email

On the main screen PPMP

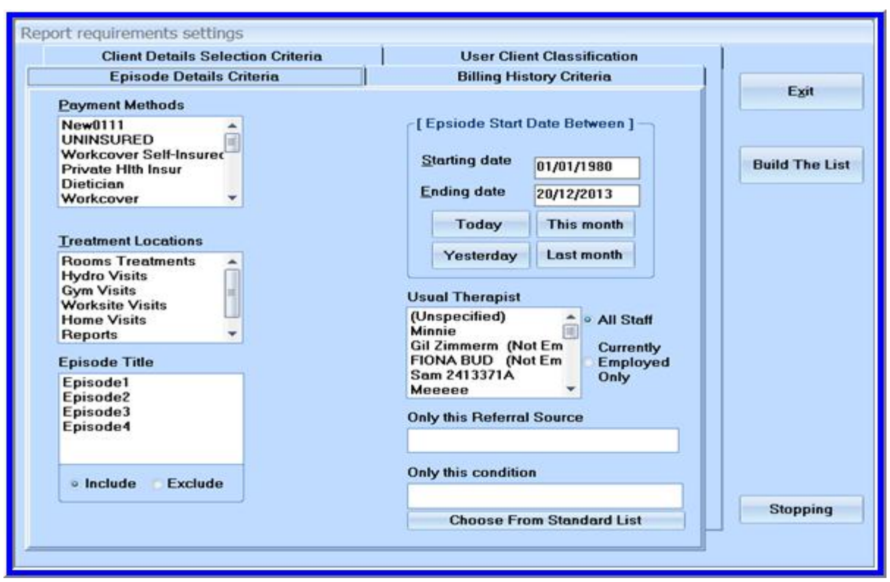


- Click Reports
- Mailout



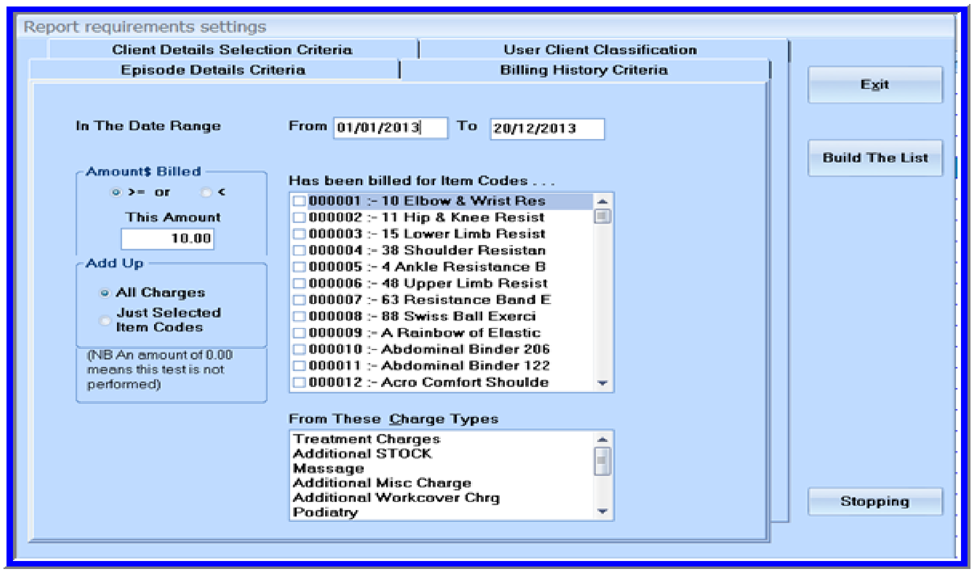
- Select the Start Date Range

OR



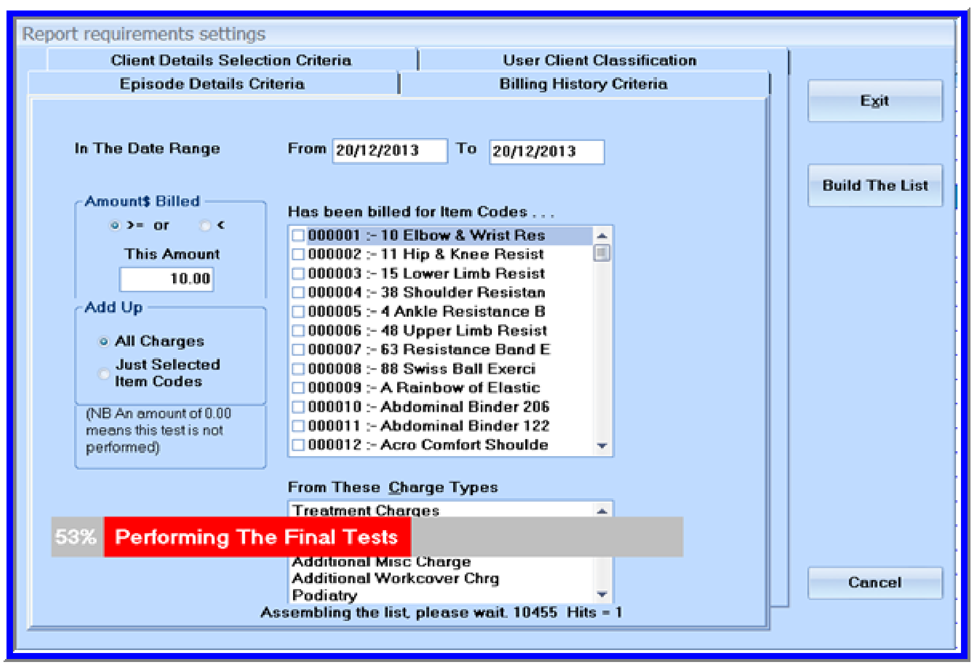
- Click Episode Selection Settings
- Select the Episode Start Dates
- Select the Payment Method, Location, Staff (or select nothing to get all fields)

OR

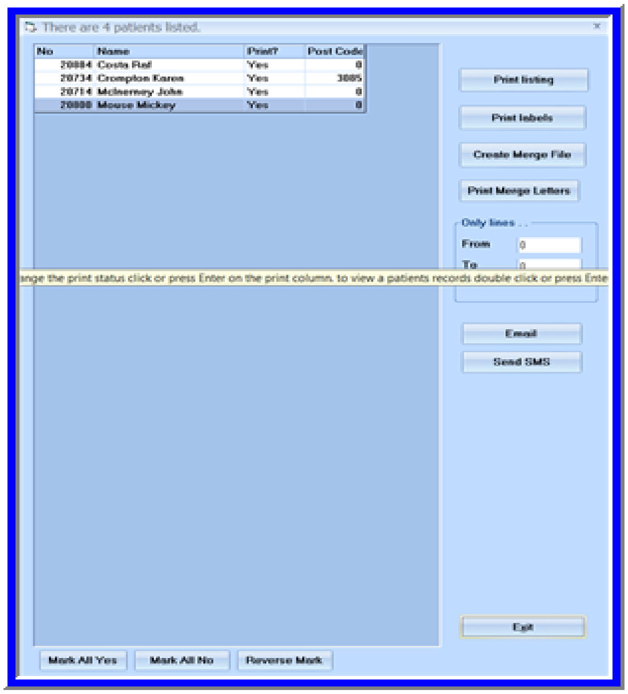


- Select Amount Billed (by specifying an amount your report will display all clients that have been billed that amount between the specified dates)

- Click Build the List



- The list is being prepared

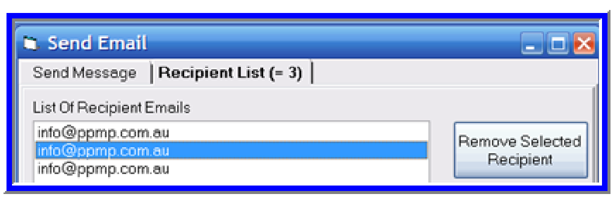


- Your list of clients will be displayed

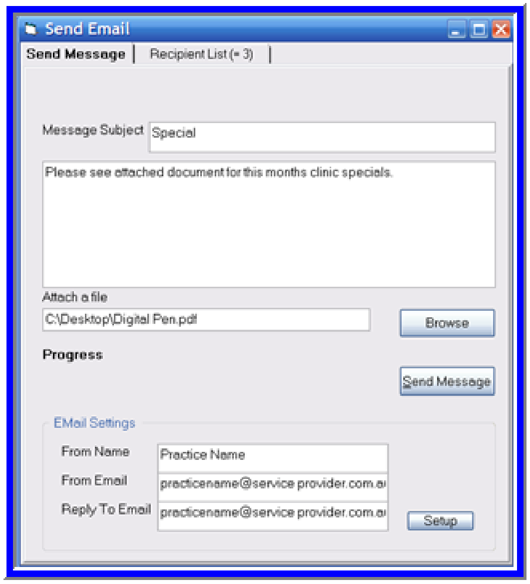
NB: Top of the screen tells you how many patients are on the list

- Click Email

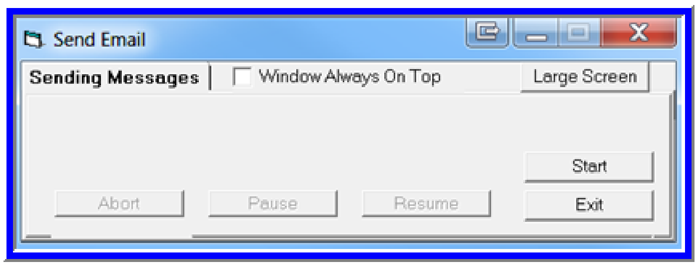
- This tells you how many clients have an email address
- Click OK



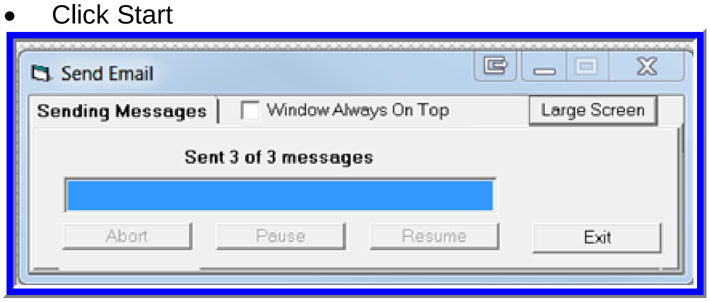
- Click Recipients to see a list of all clients with email address (delete option available)
- Click back on Send Message



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



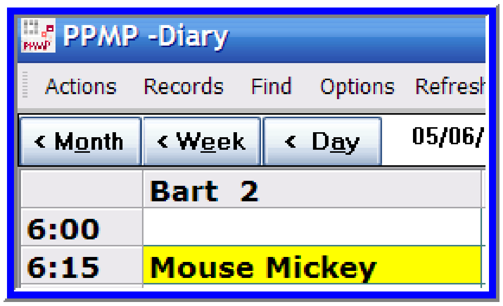
- Click Start



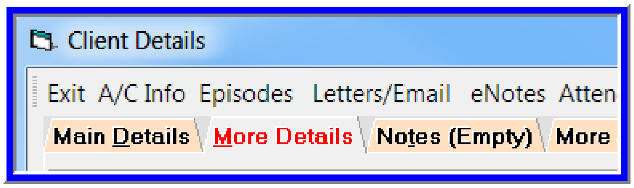
- Once all messages have been sent
- Click Exit

21 Flag 1 & 2 setup

Go to Client Details

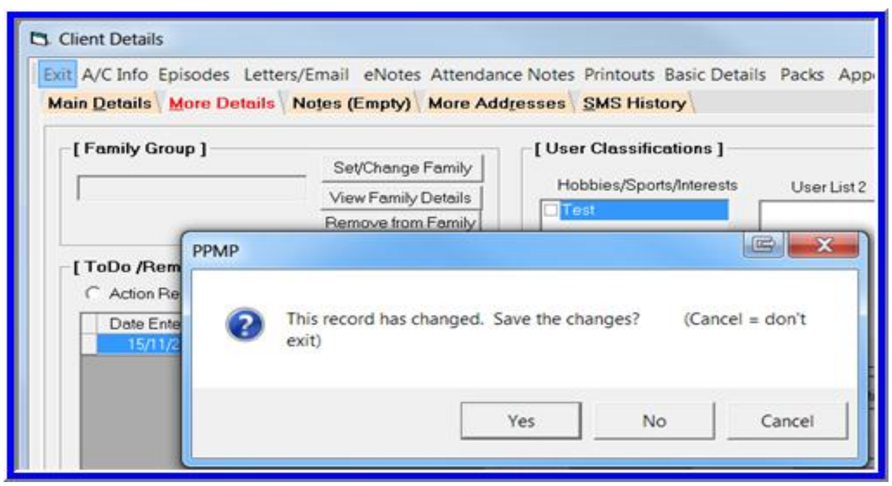


- Double click on clients name on the diary (or search for client)



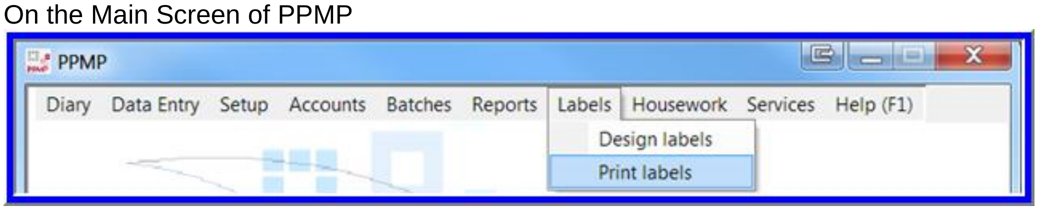
- More details

- Tick News Letter (Flag 1)

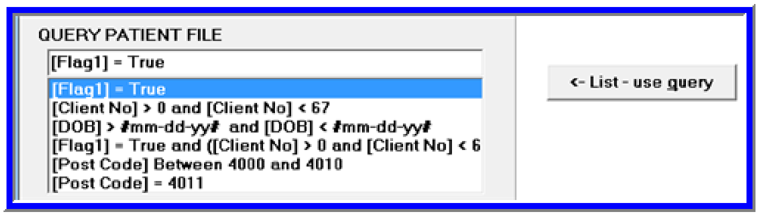


- Click Exit & Yes to Save the Changes

On the Main Screen of PPMP

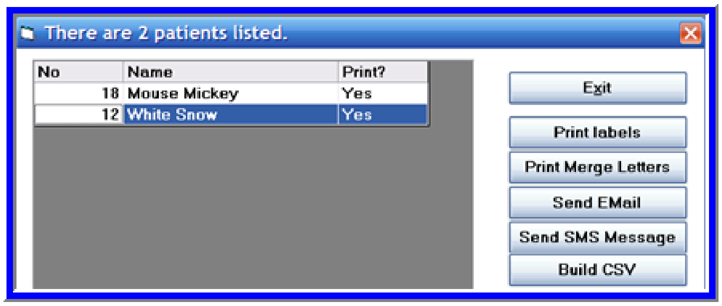


- Print Labels

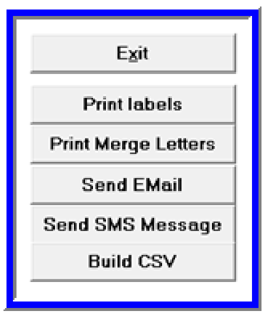


- Select (Flag 1) = True

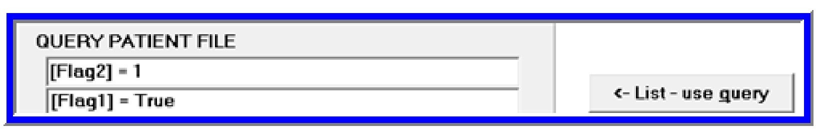
- Click "List - use query"



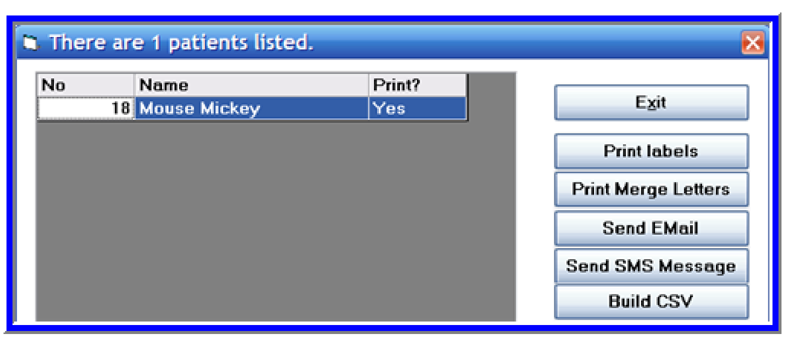
- List displays



- You can then print labels, email or sms



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



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

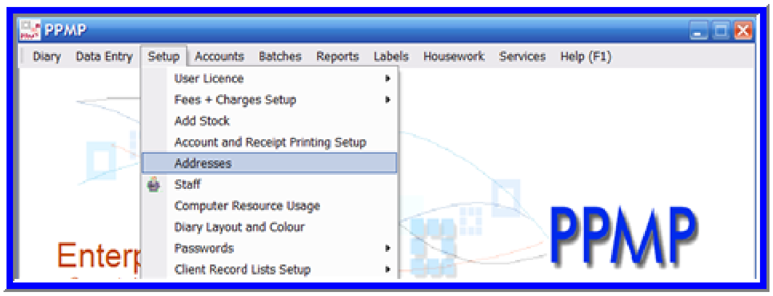
NB: If you are after a list of clients that **do not** have Flag 2 ticked – change (Flag1) to (Flag2)= 0

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

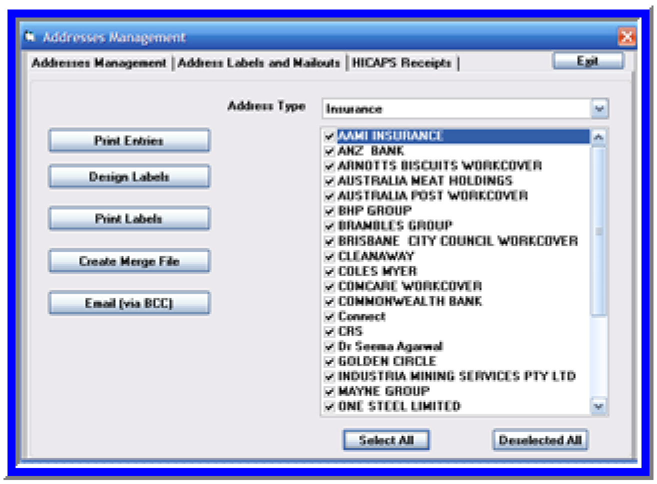
22 List and labels

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

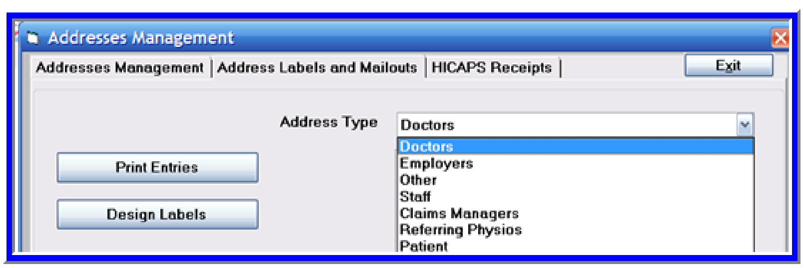
On the PPMP main menu



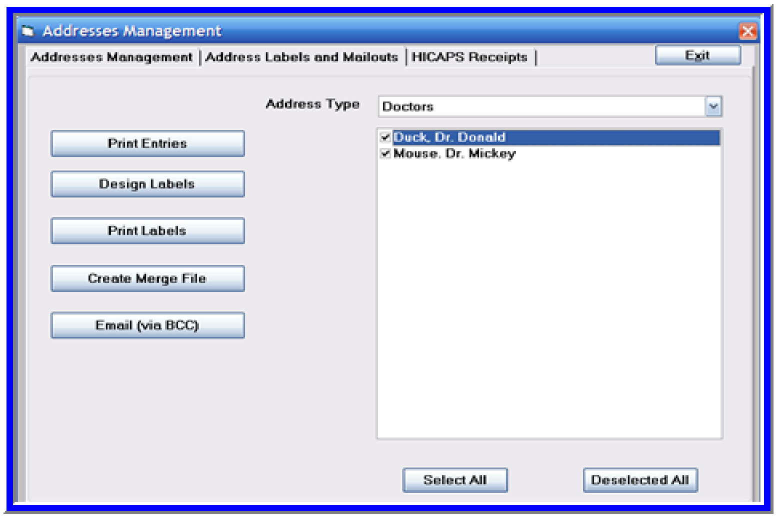
- Go to Setup
- Addresses



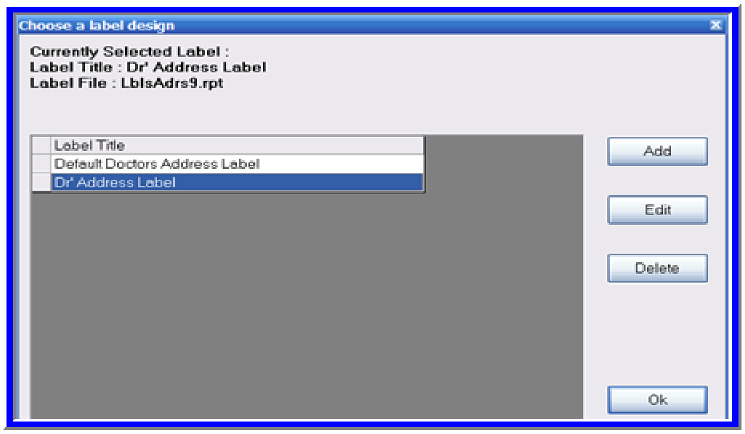
- Click on the Address Labels & Mailouts tab.
- Click Design Labels



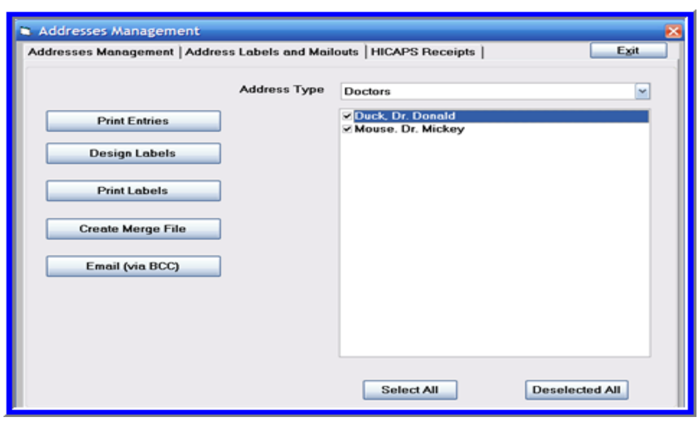
- Make a selection in the Address Types List



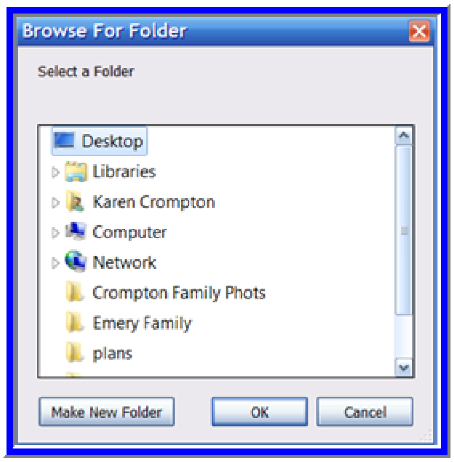
- Make your selections on the list (Deselect All and select the individuals you want or Select All)
- Print labels



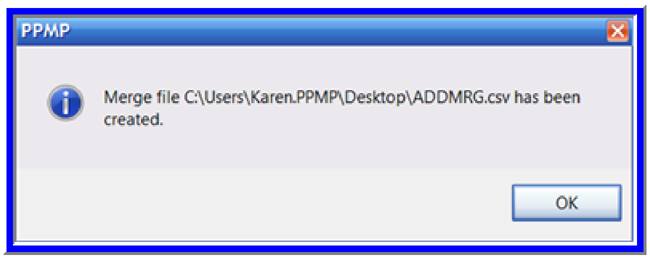
- Select Label
- Click OK
- Create a List of All Dr's Names & Addresses



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

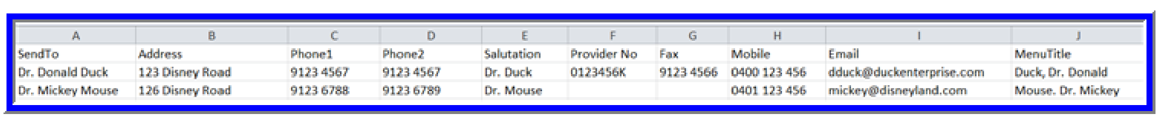


- Select where you would like to save your list



- 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

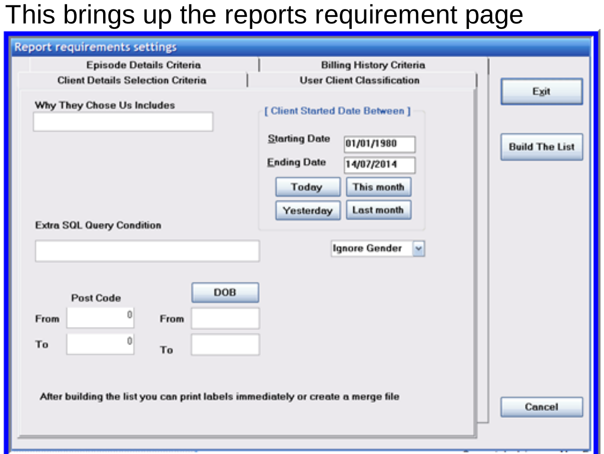
If you need any help with Mail Merge in Word try this link - http://support.microsoft.com/kb/294694

23 Mailout

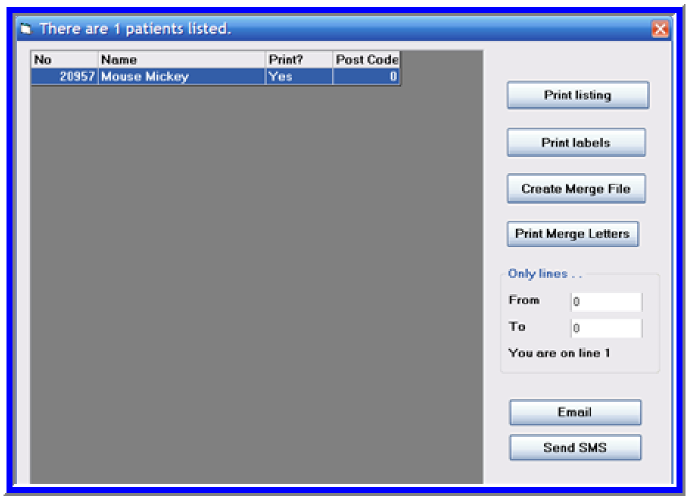
On the Main Screen PPMP

- Go to Reports
- Mailout

This brings up the reports requirement page



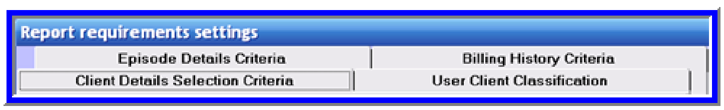
- Enter the date range – This relates to when the Client first attended your practice **<u>– LEAVE AS IS IF YOU WANT ALL ON YOUR DATABASE</u>**
- Then click Build the List



Choose what you would like to do: -

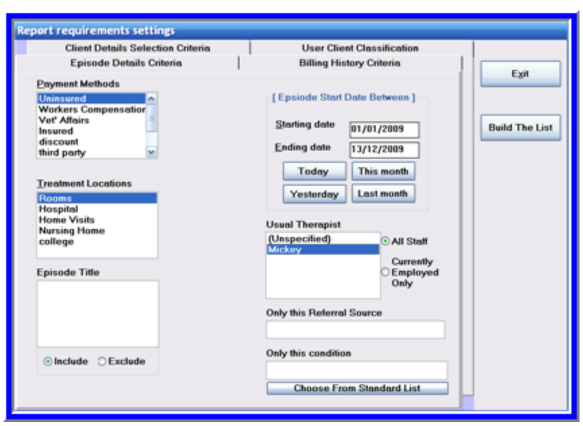
- Print Labels
- Create Merge File (will give you an excel spreadsheet with Names, Addresses, Phone numbers, DOB etc.)
- Print Merge Letters (Letters created in PPMP)
- Email
- SMS

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)

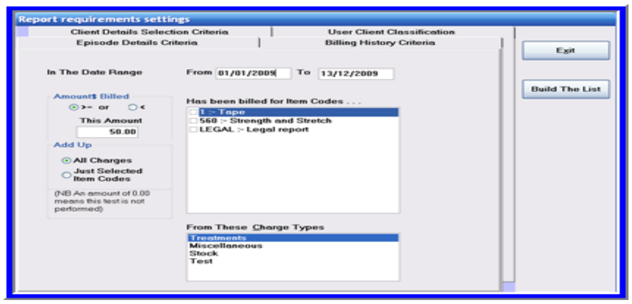


- If you want to narrow your search for a particular Payment Method or Practitioner - Select a Payment Method or charge type or Therapist
- Click Build This List

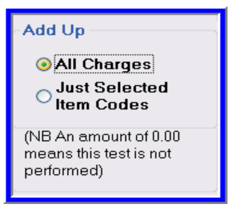
23.2 Mailout - List of clients that have spent above a certain dollar amount

- Click on Billing History Criteria

- Select your Date range



- 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

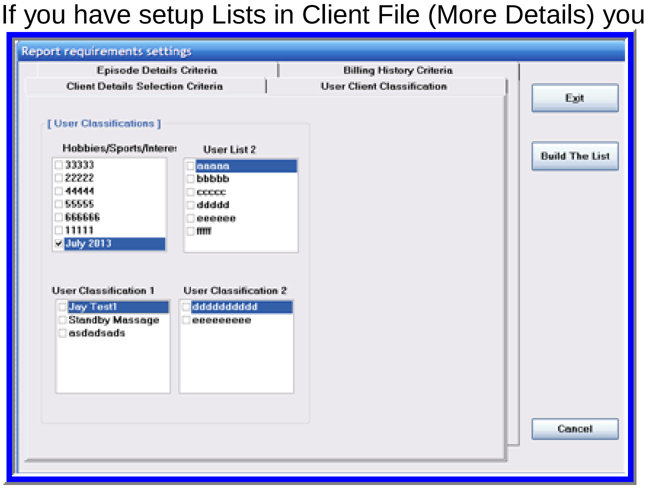


- Select ALL charges orJust Selected Item Codes - click on an Item Code and Charge Type from the List
- Click Build the List

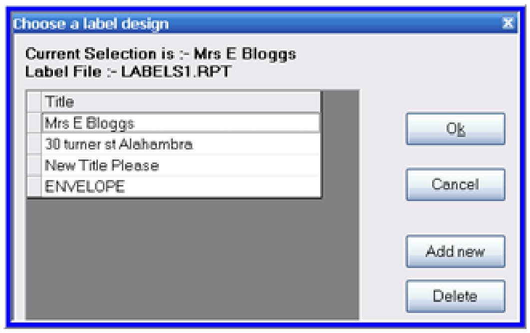
The above 3 steps can also be combined e.g.: you can select your client Start Dates from No:1 then select a Payment Method from No:2 and an amount from No:3 – Then Build the List

23.3 Mailout - User client classification

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

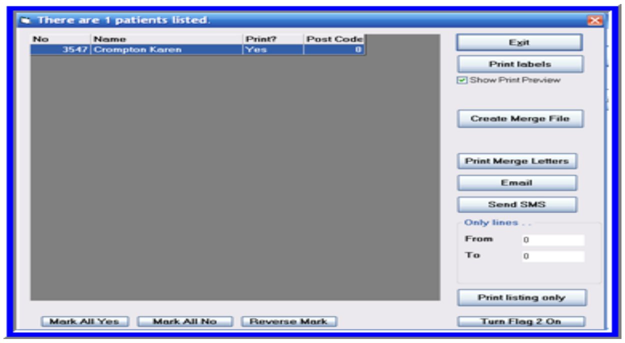


- Select from the List you have created
- Build the List
- This report only refers to what you have selected on your List (you can't combine 2 lists)



- 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:-



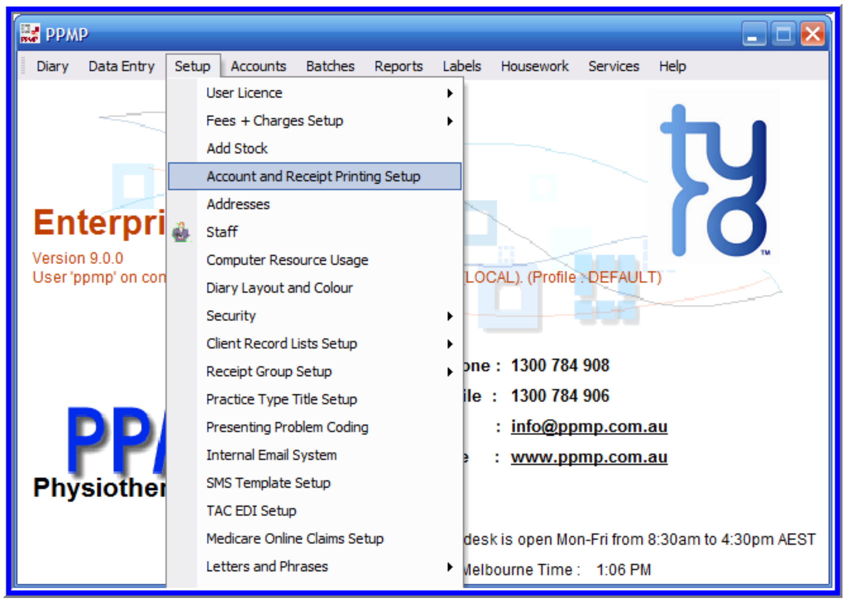
- Click on Yes in the Print column to change to No (or click No to change back to Yes)
- Patient's with No selected will not be included in Labels, Letters or emails.
- They will still appear on the List if you select Print Listing only (with NO in the Print Column).

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

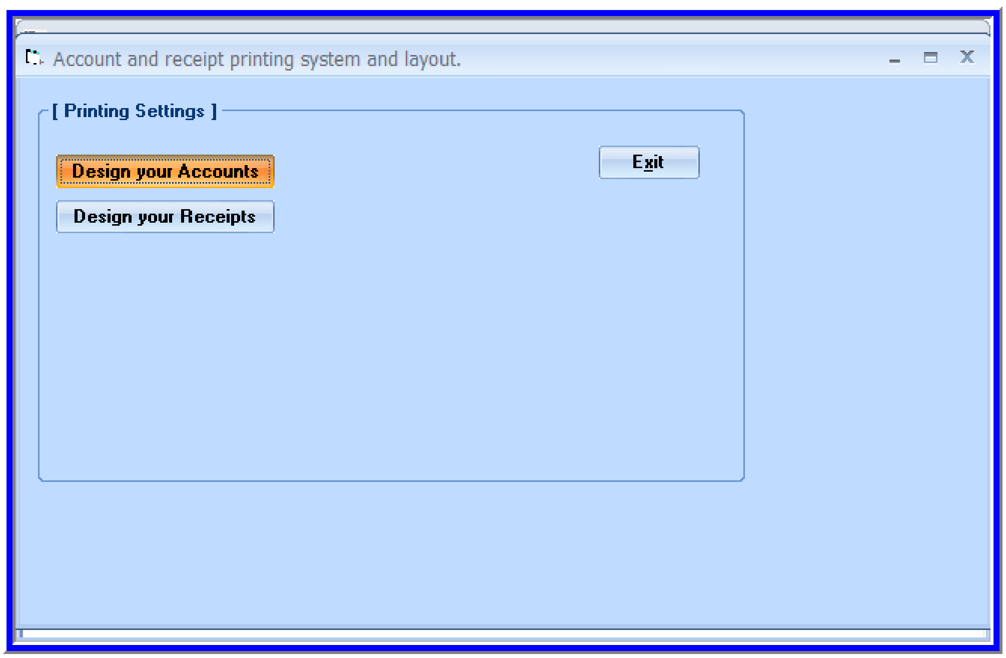
24 Printer setup for accounts & receipts

Click HERE to watch video

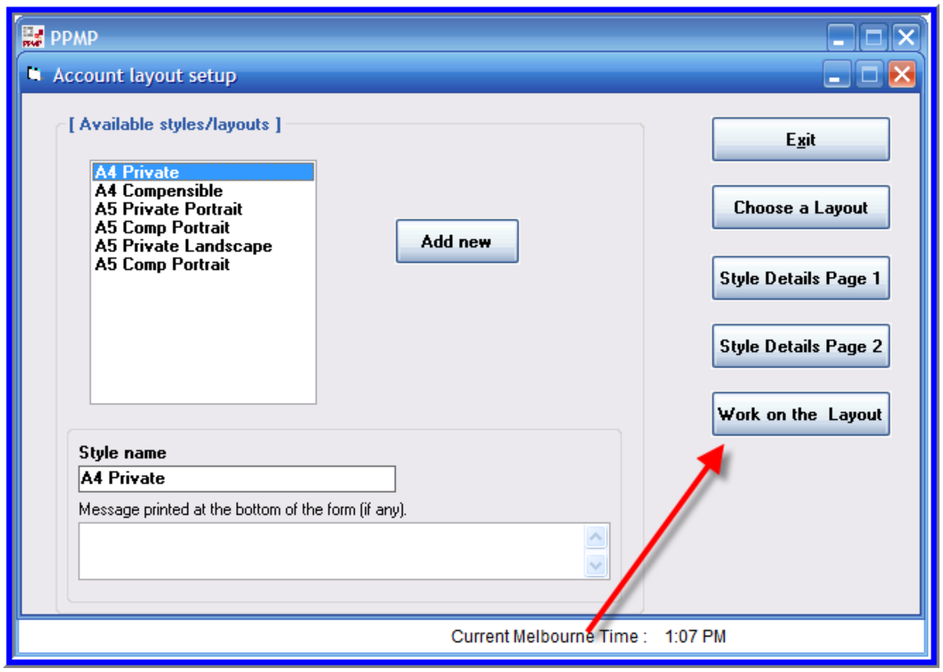
On the Main PPMP® Menu



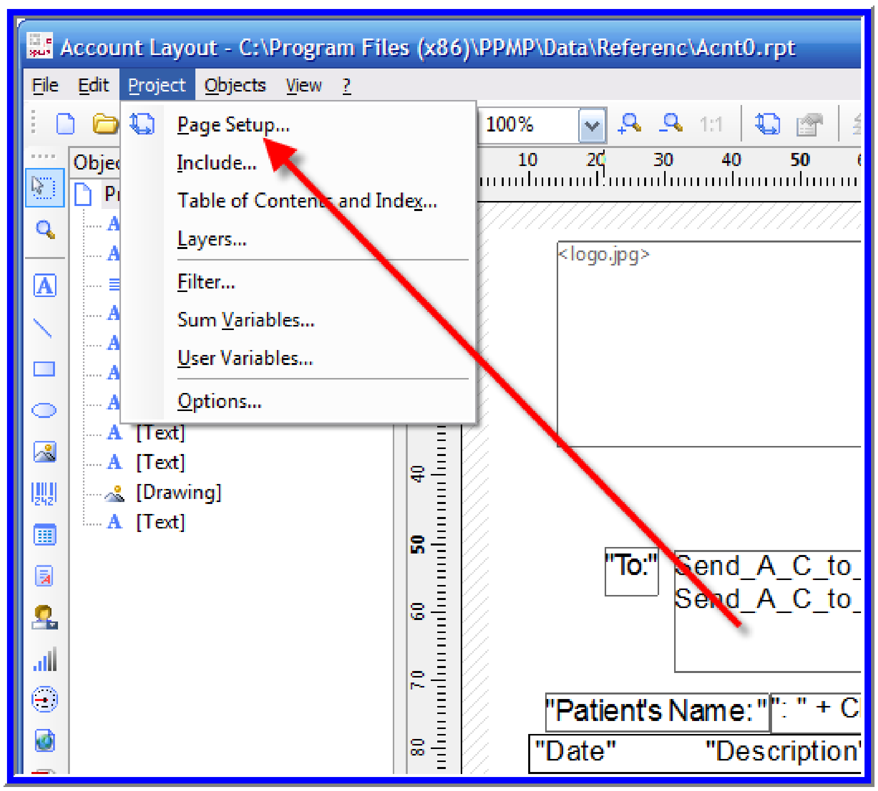
- select Setup
- Account & Receipt Printer Setup



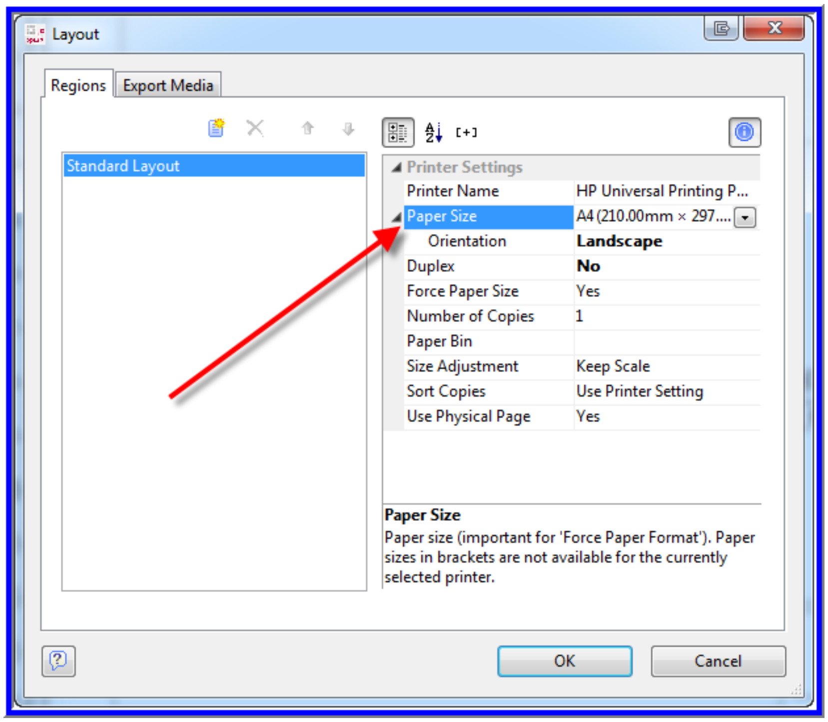
- Select Design your Accounts
- Select the account layout that you use (you may use a few, you will need to repeat steps)



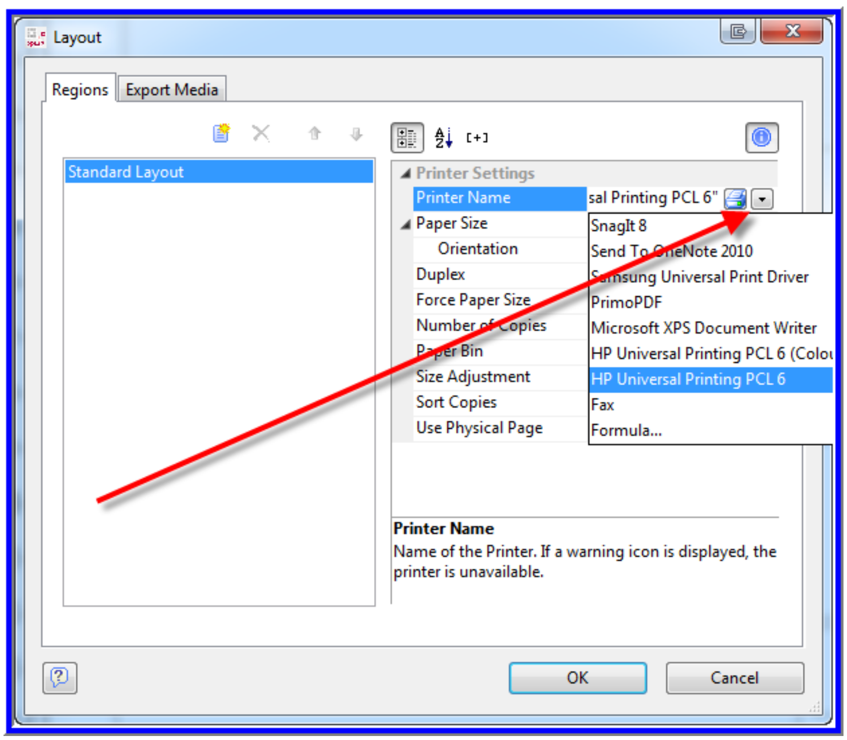
- Click Work on the Layout.



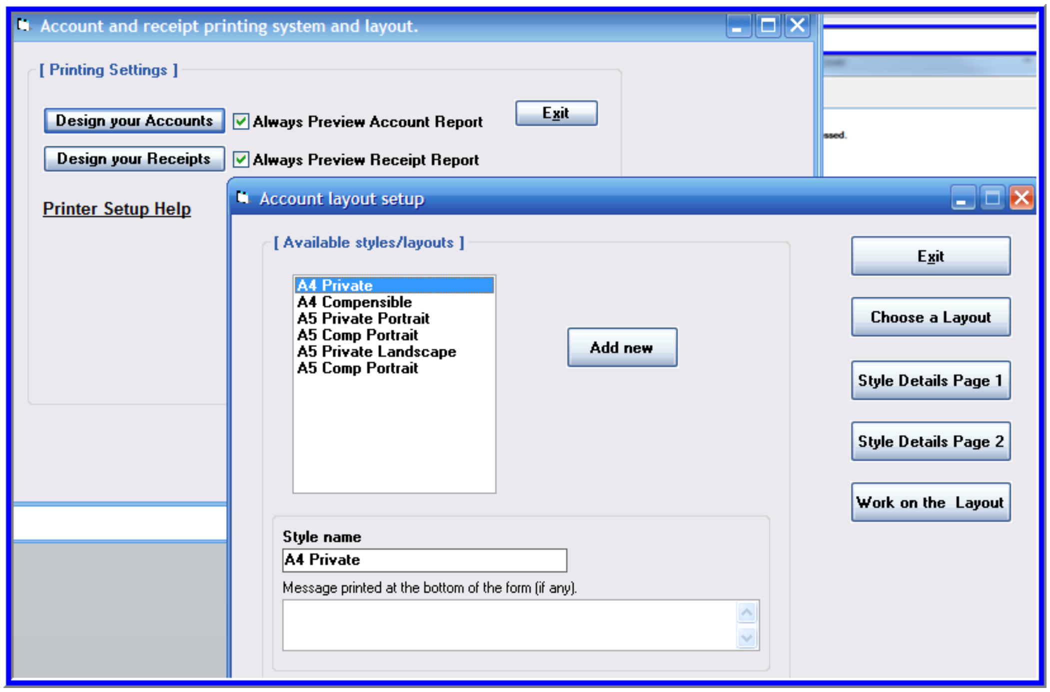
- The design will open, select Project then Page Setup



- 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.

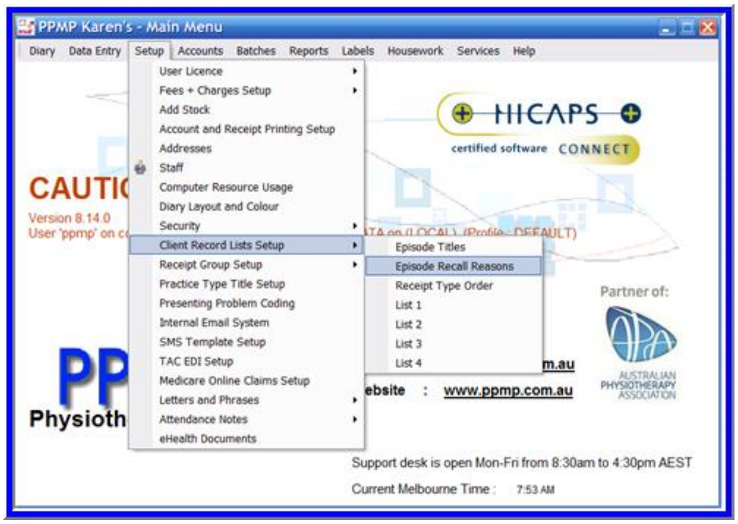


- Repeat steps for all Account & Receipt layouts that you use.

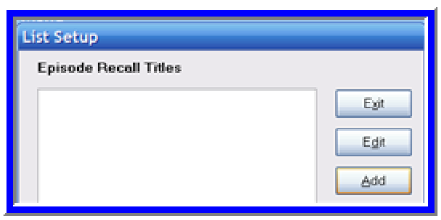
25 Recalls

25.1 Create your own recall reasons

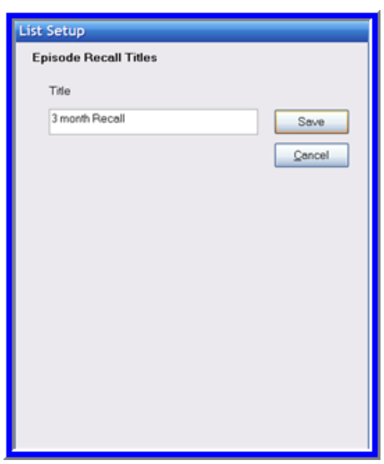
On the Main screen of PPMP



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



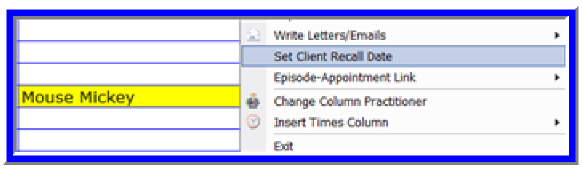
- Click Add



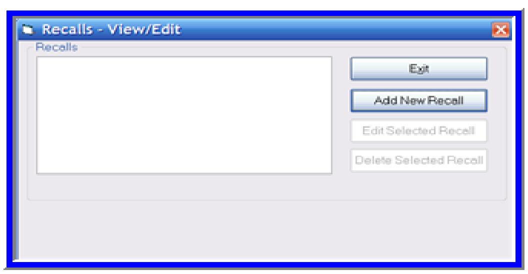
- Enter a Recall Title Name
- Click Save

- Click Exit

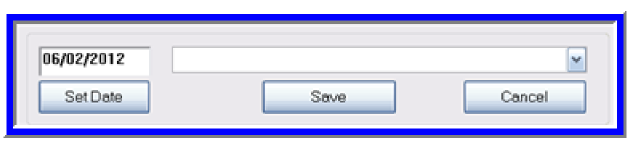
25.2 Setting recalls



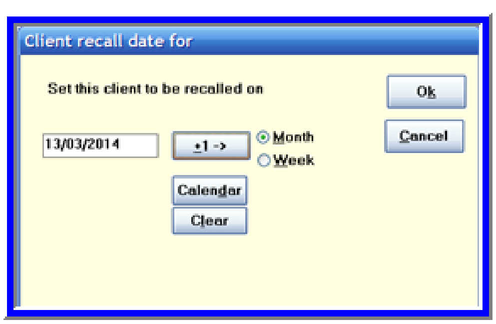
- Right Click on client's name (from the diary)
- Click Set Client Recall Date



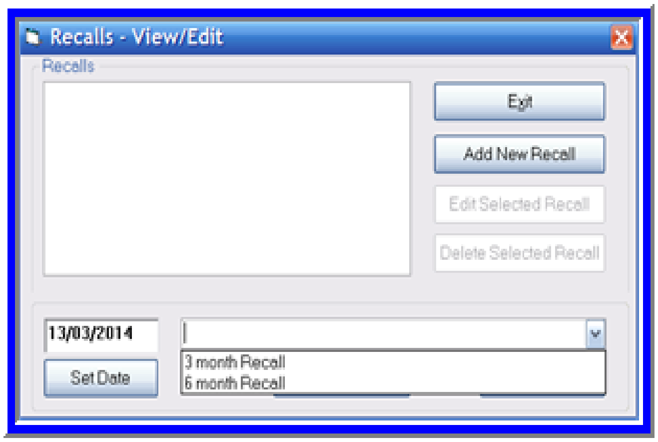
- Click Add New Recall



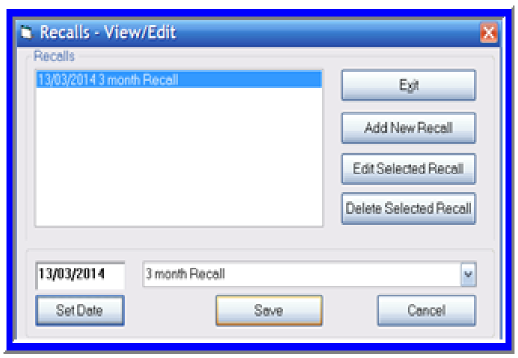
- Click Set date



- Set the date (either click ahead Month or Weeks or click Calendar to select date)
- Click OK



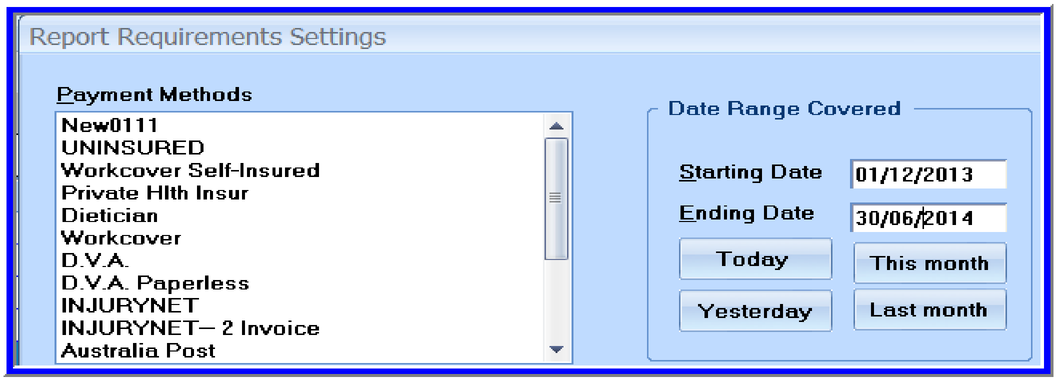
- Select Recall reason from drop down list or type in a different reason



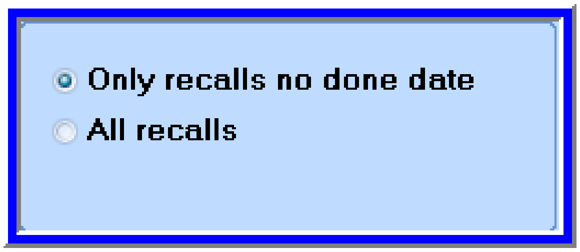
- Click Save
- Click Exit

25.3 To view/action recalls

- Click Reports
- Recalls
- Issue recalls

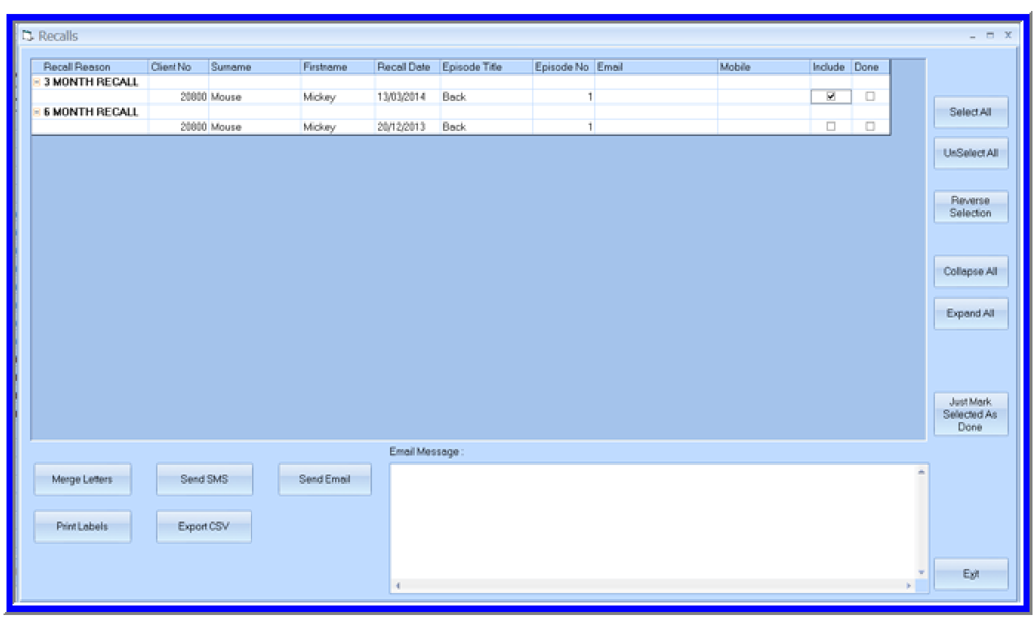


- Select Date Range



- Select Only Recalls – no done date

- Select Recall Reason (or leave blank for ALL recall reasons)
- Display



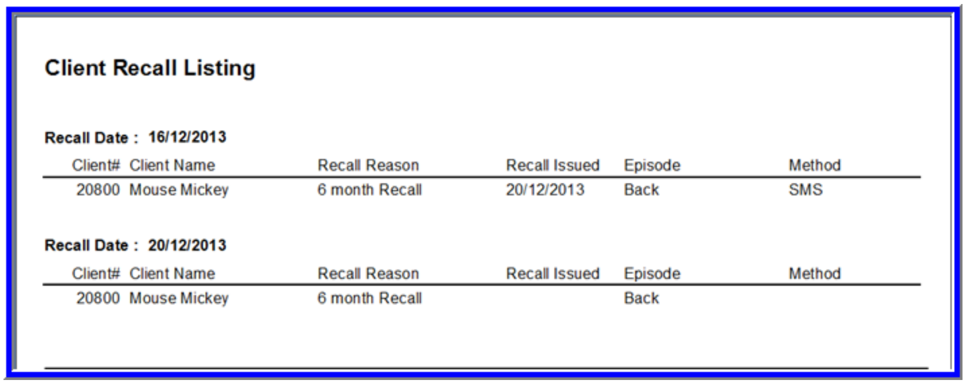
- Tick the Recalls to include

- Select from Options - Merge Letters /Send SMS/ Send Email / Print Labels / Export CSV.

OR

- Click Just Mark Selected as Done
- Exit

25.4 Selecting recalls by date



Client Recall Listing

Recall Date : 16/12/2013

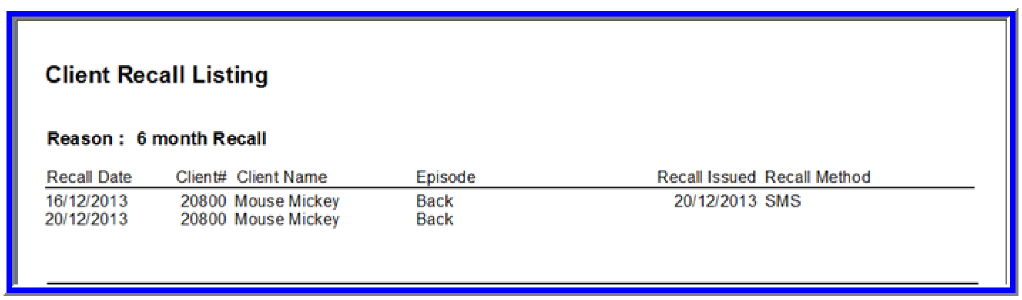
Client#	Client Name	Recall Reason	Recall Issued	Episode	Method
20800	Mouse Mickey	6 month Recall	20/12/2013	Back	SMS

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



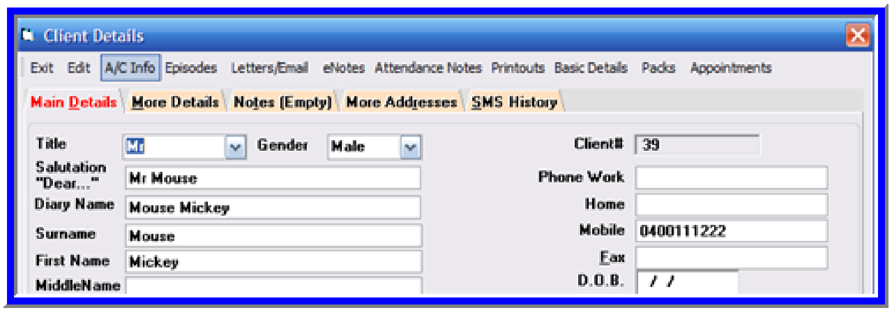
Client Recall Listing

Reason : 6 month Recall

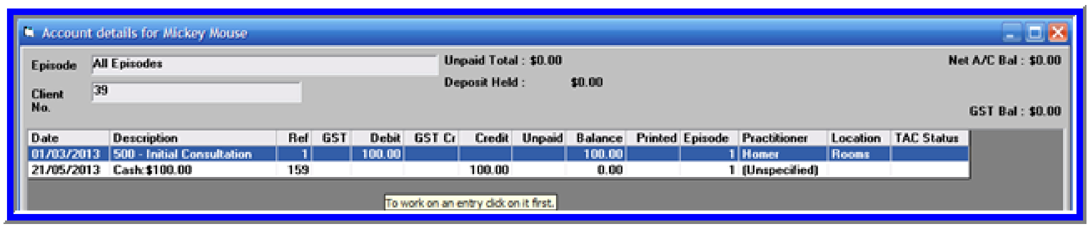
Recall Date	Client#	Client Name	Episode	Recall Issued	Recall Method
16/12/2013	20800	Mouse Mickey	Back	20/12/2013	SMS
20/12/2013	20800	Mouse Mickey	Back		

- All recalls will be listed– Including recalls sent Indicating how they were notified.

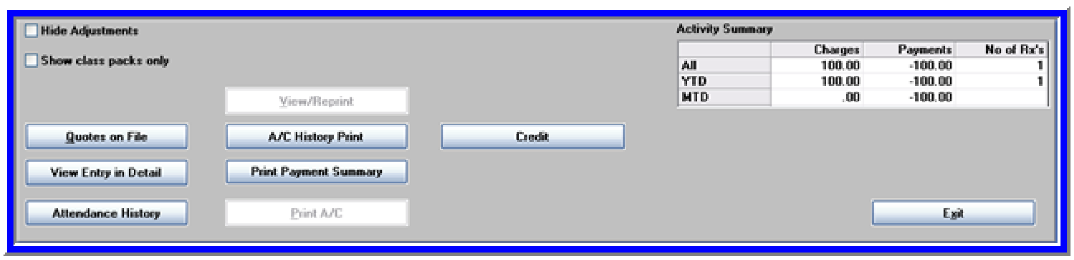
26 Refunds / Credits



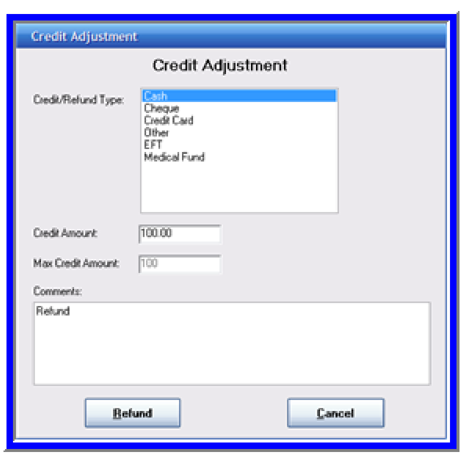
- Open Client Details Screen
- Click A/C Info



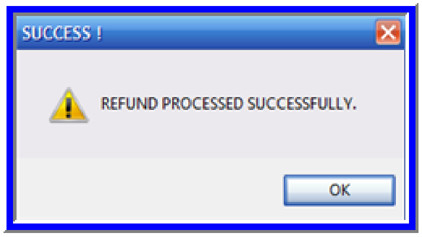
- Click on the Treatment Charge



- Click Credit Button



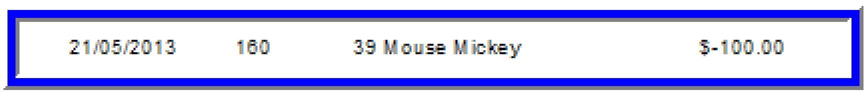
- Select Credit/Refund Type
- Enter amount being refunded
- Enter comment relating to refund (e.g. why it is being refunded)
- Click Refund



- Refund Processed Successfully
- Click OK
- Exit

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.

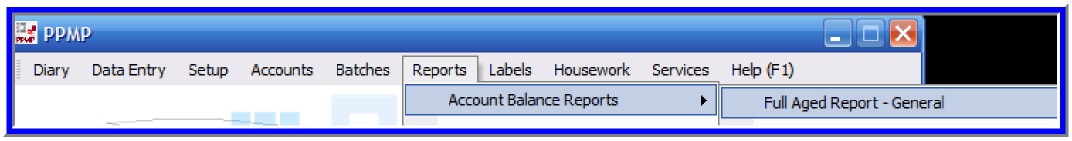


- All reports show negative / refunded amounts

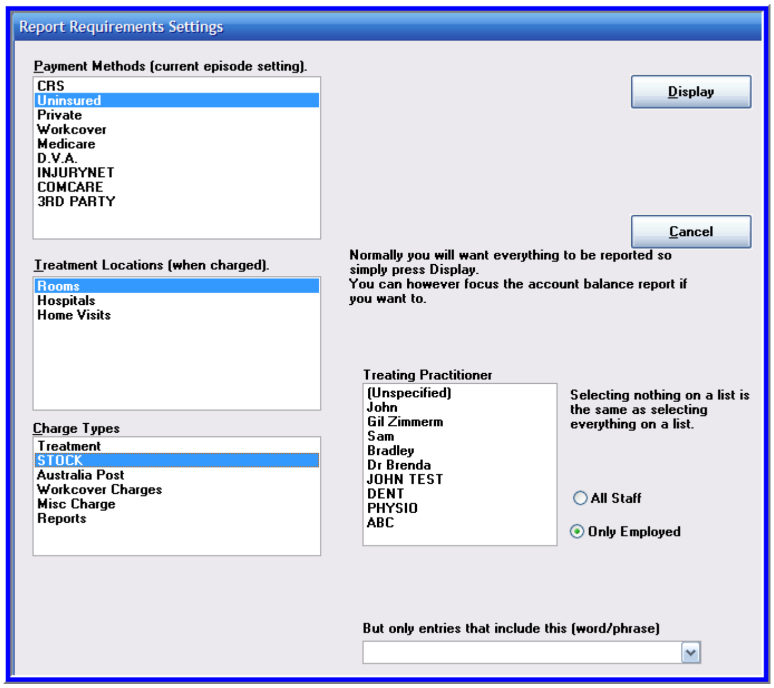
27 Reports

27.1 Accounts balance

On the Main screen of PPMP®



- Reports
- Account Balance Reports
- Full Aged Report General

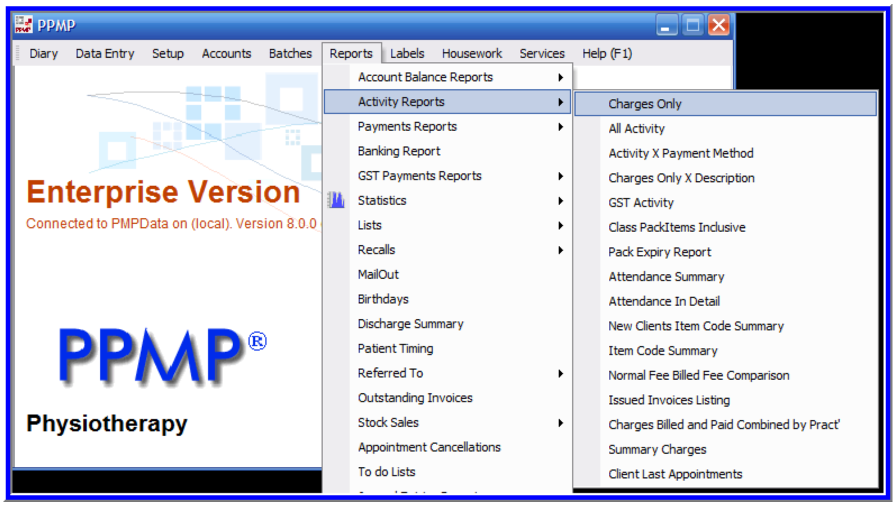


- Select required fields or leave blank for everything
- Click Display

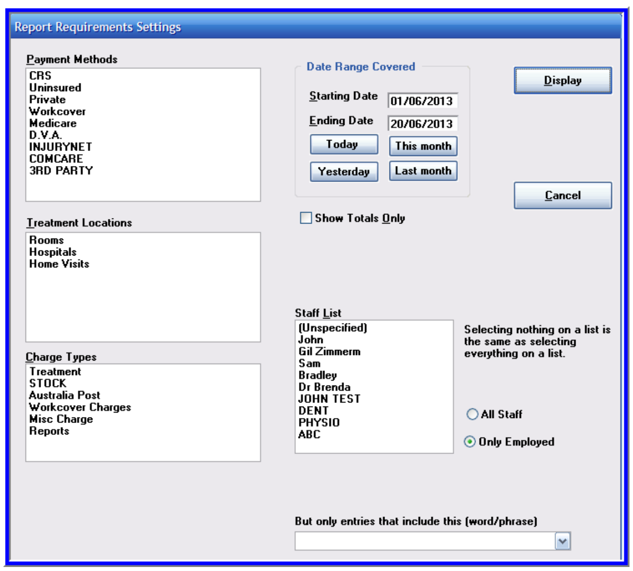
- Report displays

27.2 Activity report

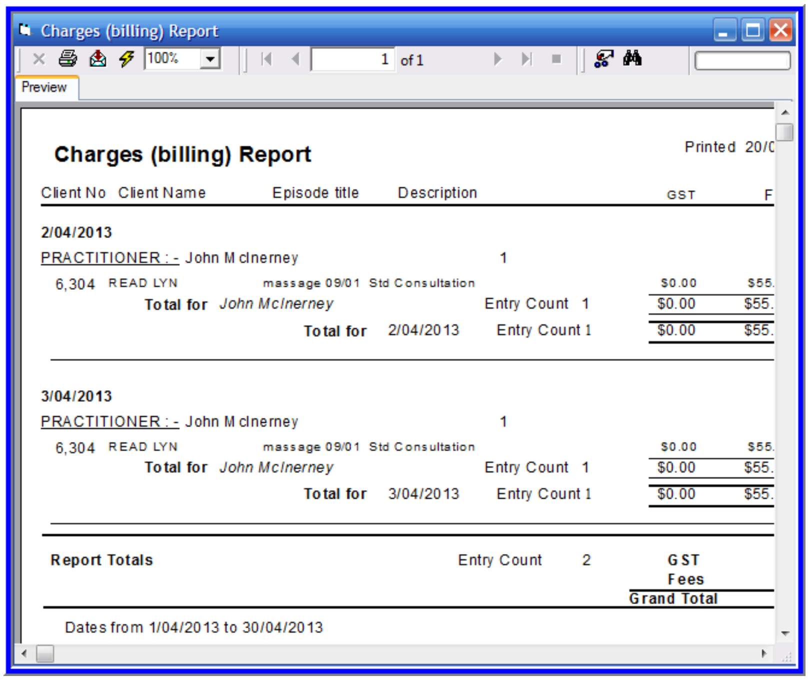
On the Main screen of PPMP®



- Reports
- Activity Reports
- Select desired report from this list
- New menu will appear



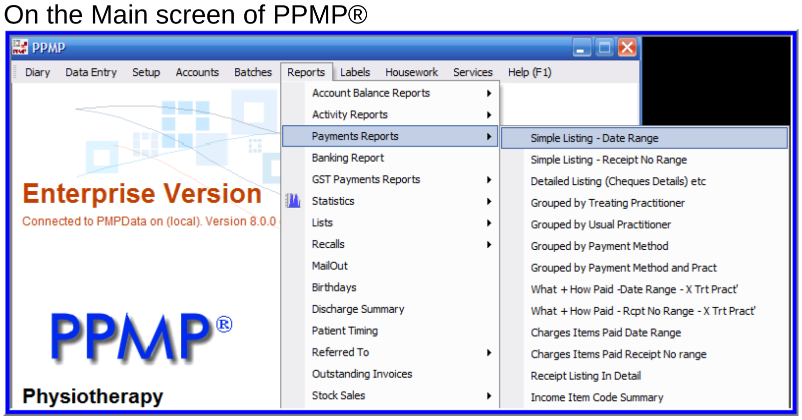
- Select required fields and date range
- Click Display



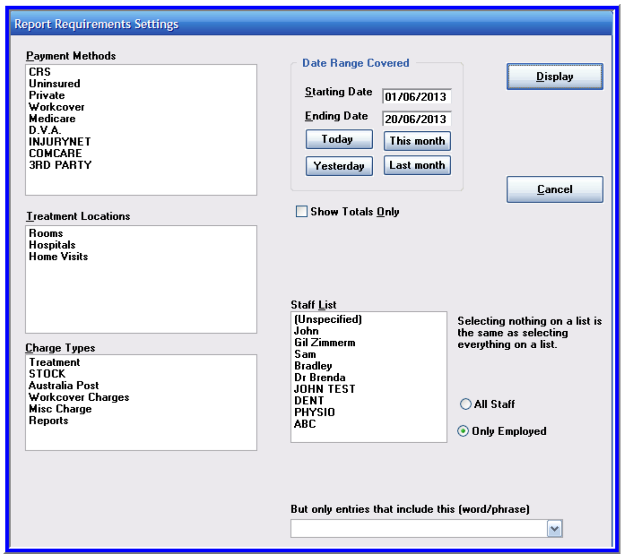
- Report displays

27.3 Payments report

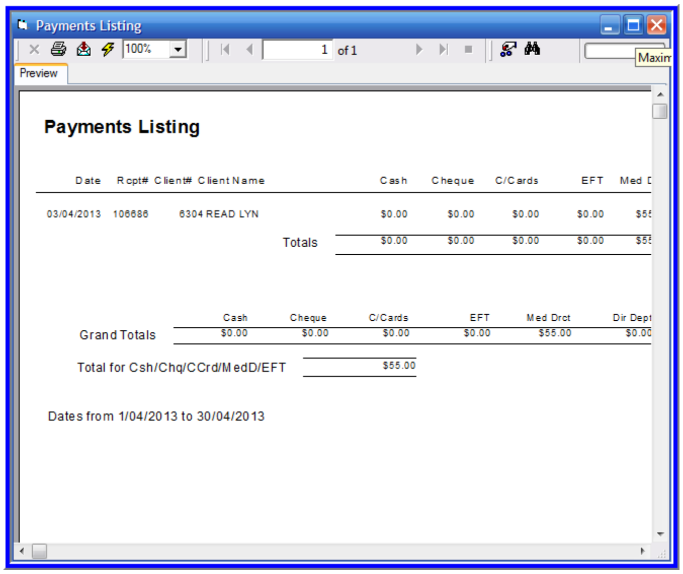
On the Main screen of PPMP®



- Reports
- Payment Reports
- Select desired report from this list
- New menu will appear



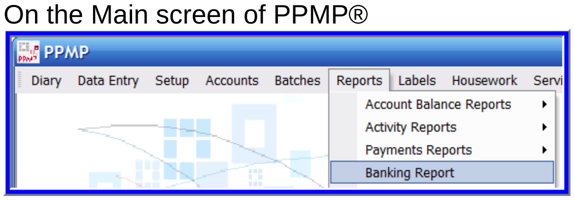
- Select required fields and date range.
- Click Display



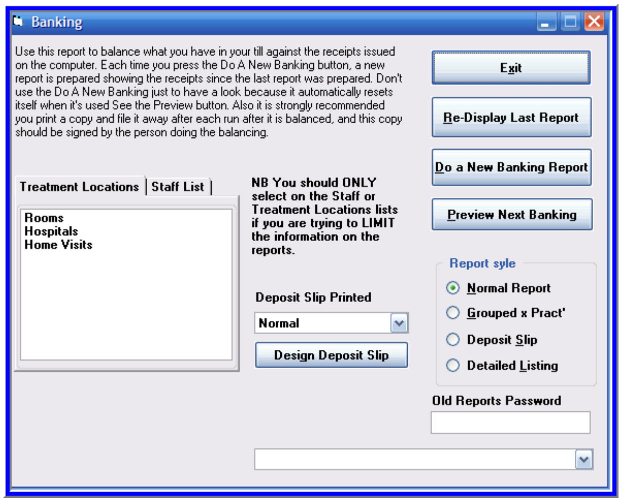
- Report displays

27.4 Banking

On the Main screen of PPMP®

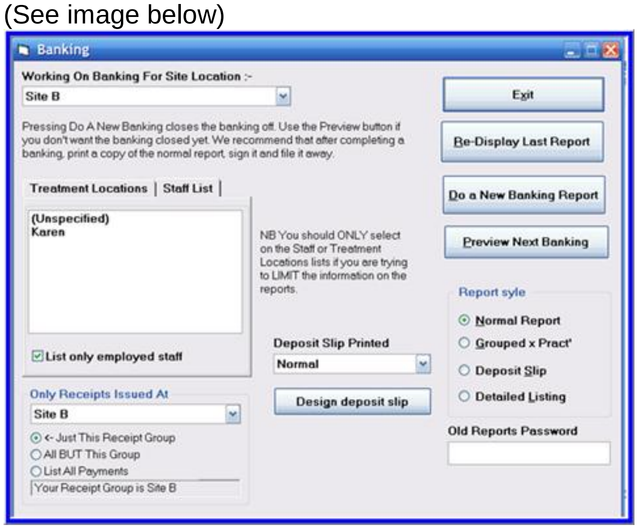


- Reports
- Banking Report



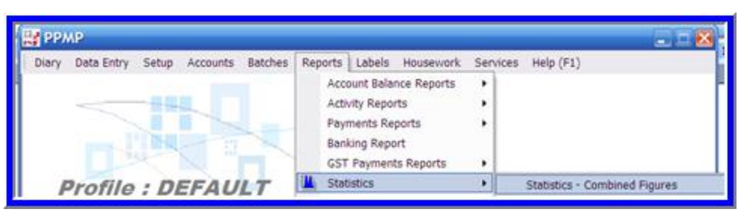
- Click – Preview next Banking - to balance all money OR
- Do a new Banking Report – when you are going to the bank.
- Select Deposit Slip – to view Cheque & Cash Amounts to be banked

NB: If you have Alternate Banking Sites set – you can select to do preview banking reports for each different site. (See image below)

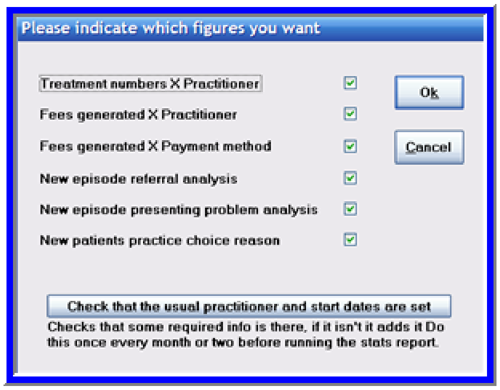


27.5 Statistics report

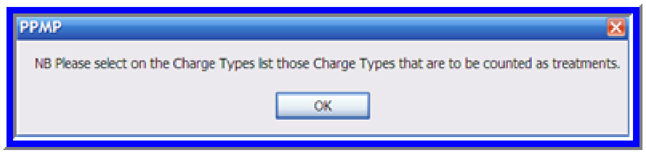
On the Main Screen of PPMP®



- Go to Reports
- Statistics
- Statistics – Combined Figures



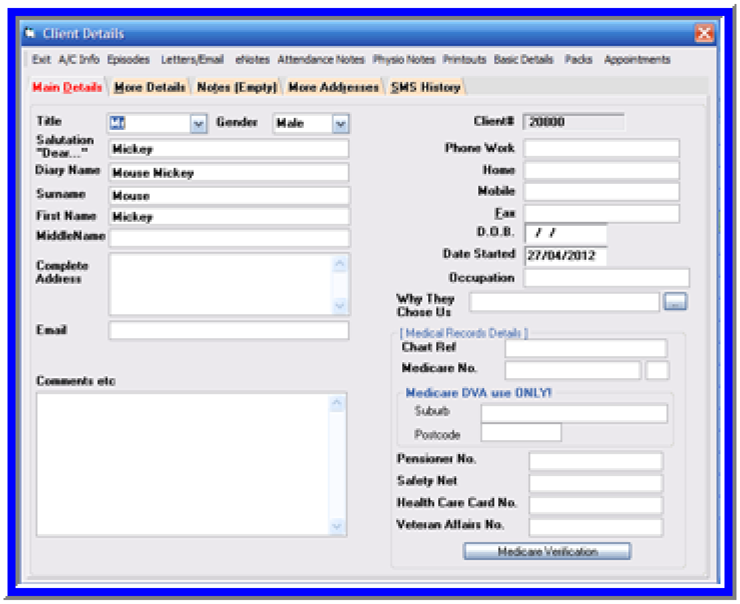
- Select items you want to show on report
- Click OK



- Click OK

28 Scanning and attatching documents to client files

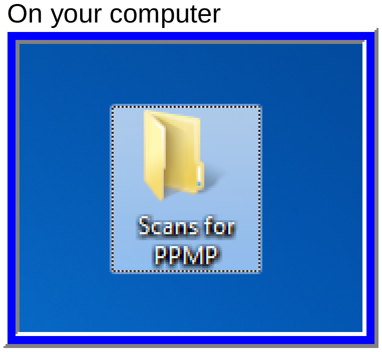
Click HERE to watch video



- Open Client Details
- Click Episodes
- Click Documents

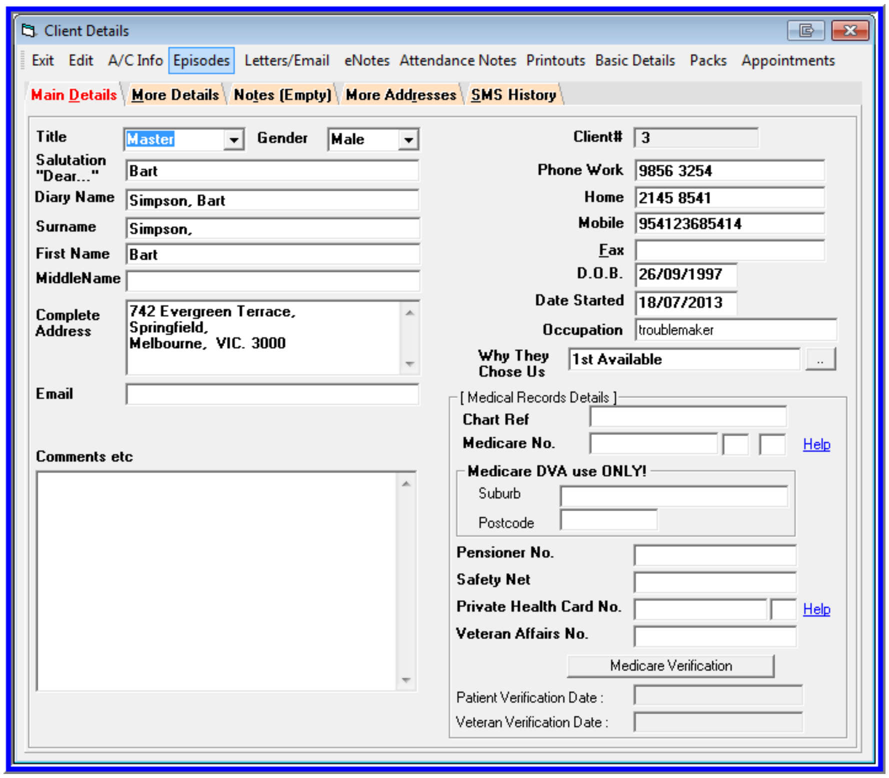
If you receive new patient forms and other documentation regarding your clients and you would like to save them in your clients file:

On your computer



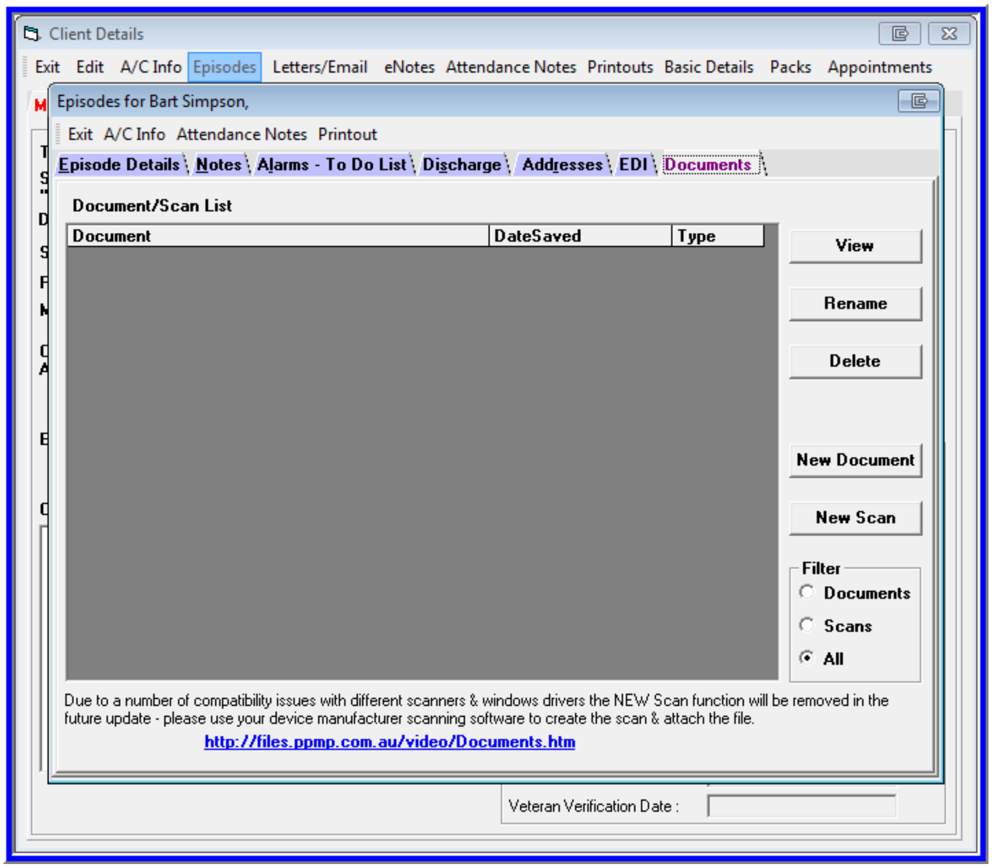
- Make a folder on your Desktop (or My Documents)

- Scan and save the original to that folder – giving it a specific name.

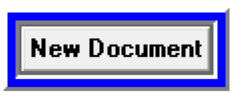


- Open your client file
- Go to Episodes tab

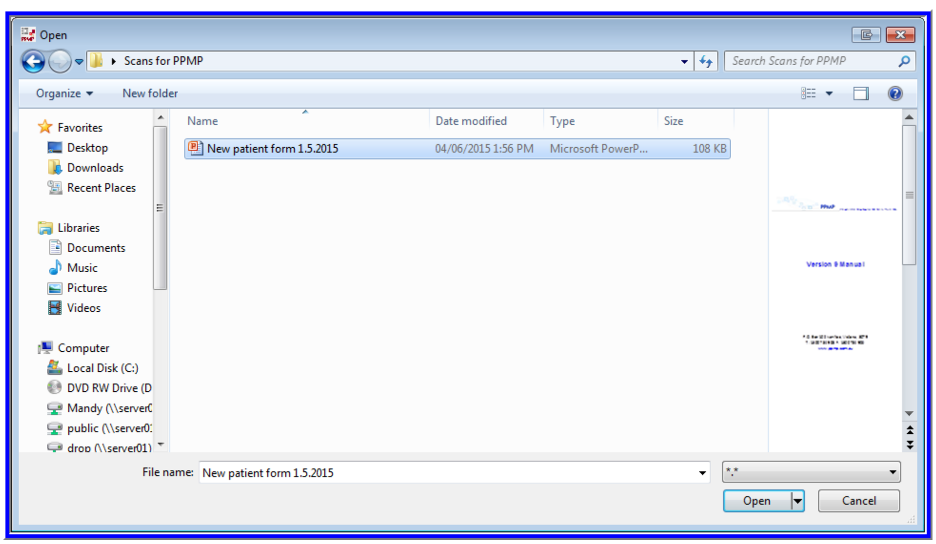
- Select the Correct Episode from the list



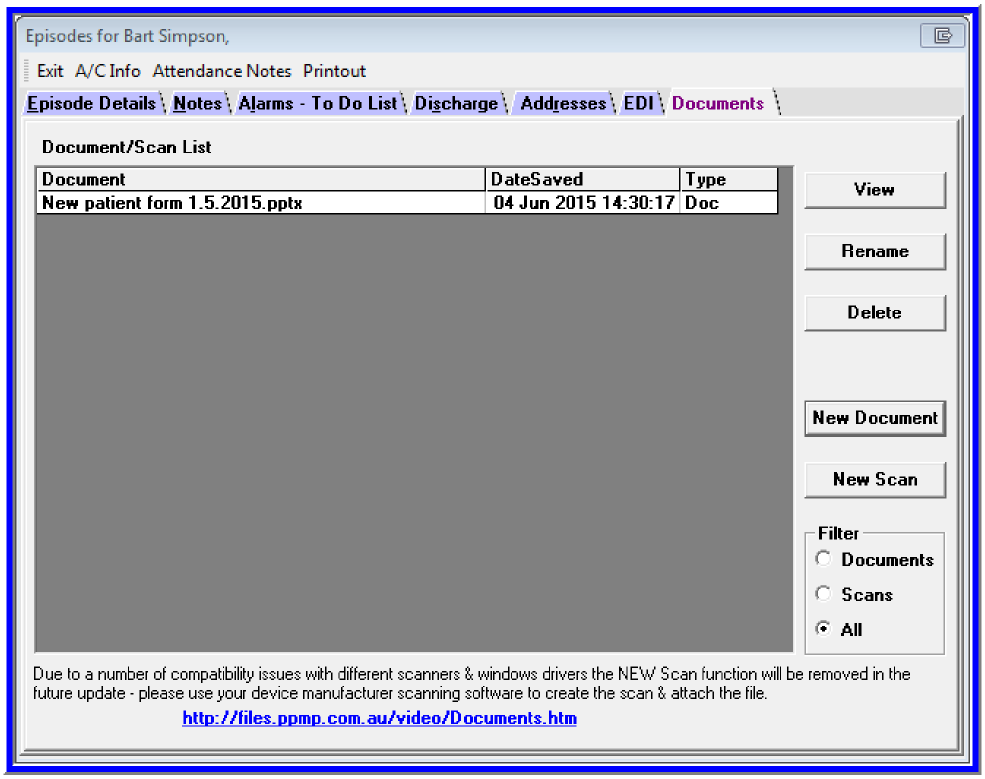
- Click Documents



- Click New Document



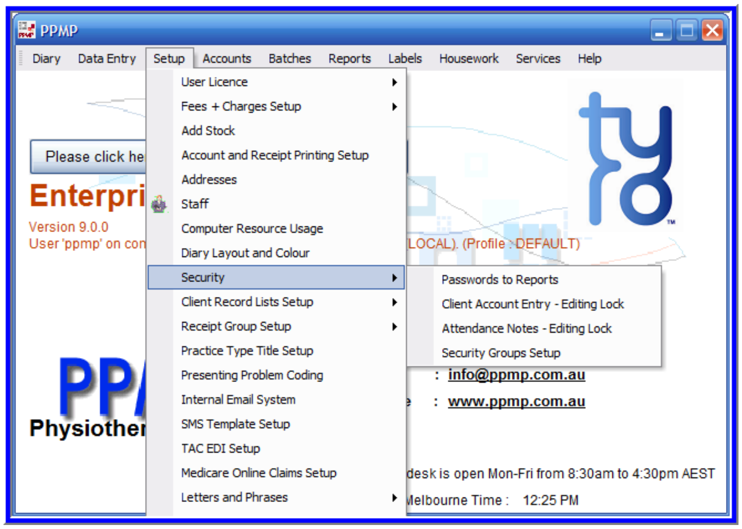
- Go to the new folder you created on the computer
- Select Document
- Click Open



- Go back to the Document List
- Select the Item from the list
- Click View to see the document in its entirety

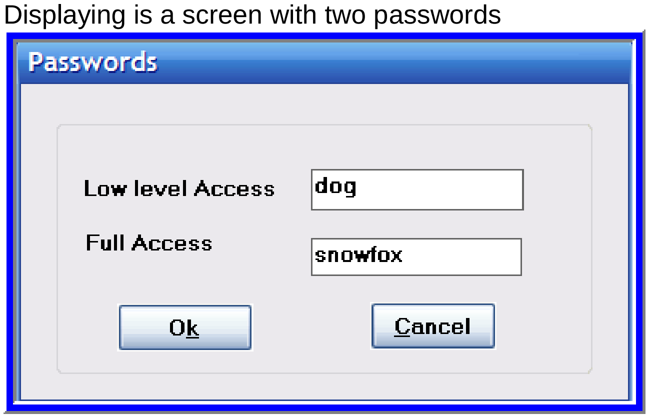
29 Security & passwords

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



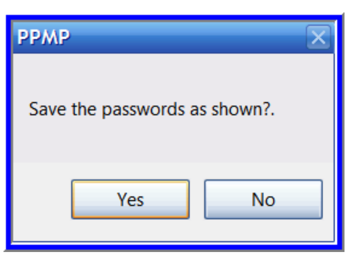
- Click OK

Low level access

- The password put in this field will allow you access to all the reports.

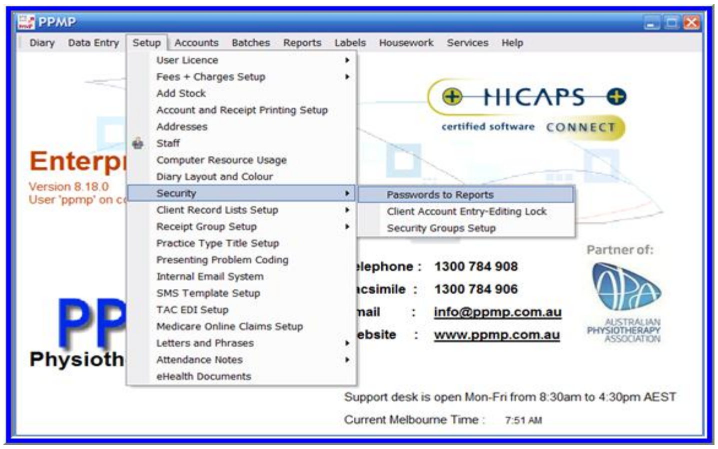
Full access

- The password put in this field, will allow you to change both the Low level access and Full access passwords.



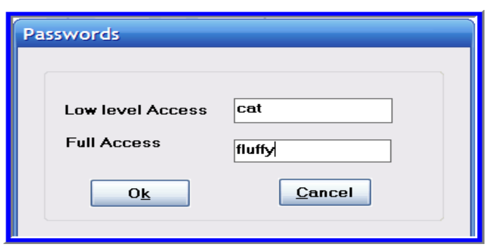
- Click Yes

29.2 Changing passwords

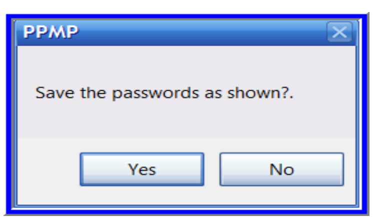


- Click on Setup
- Passwords
- Passwords to reports

- Type in your Full access password
- Click OK



- You can then change the passwords



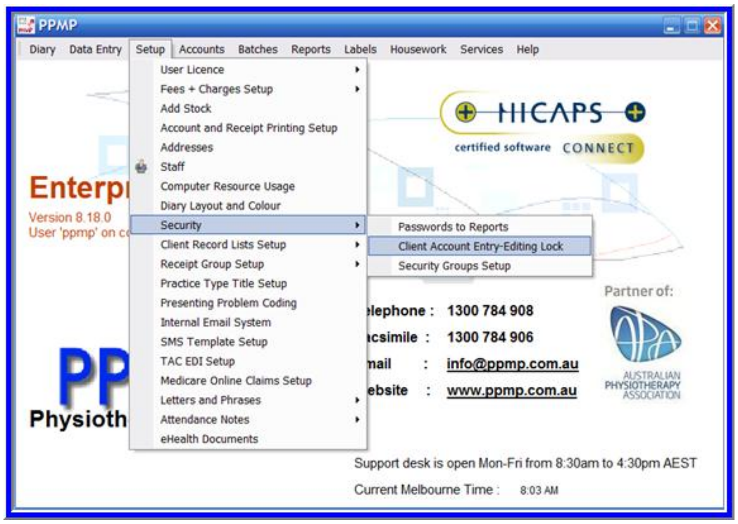
- Click Yes

- Go to Reports
- Paynments 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

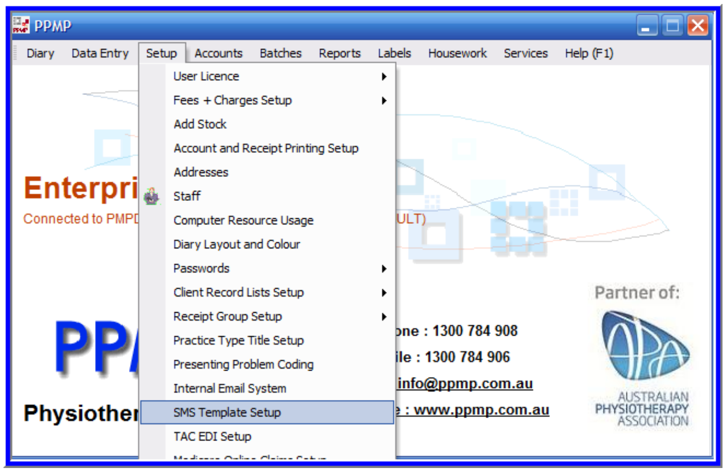
29.5 Security group setup

This section is there in preparation for Future Development

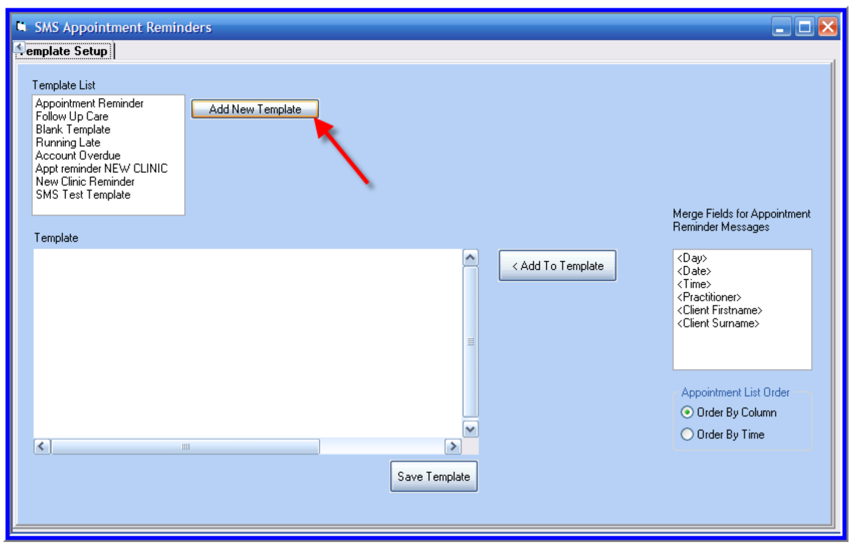
30 SMS

30.1 SMS template setup

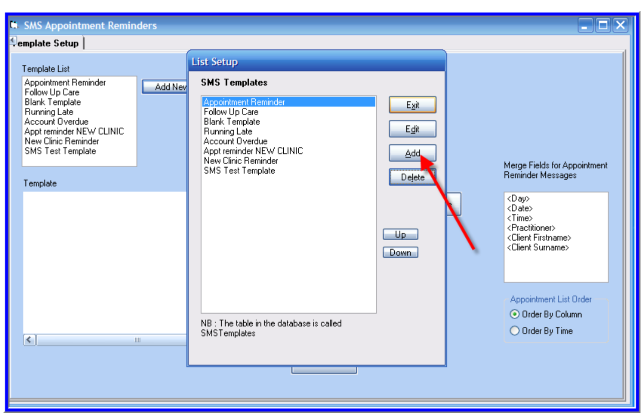
On the Main Menu PPMP®



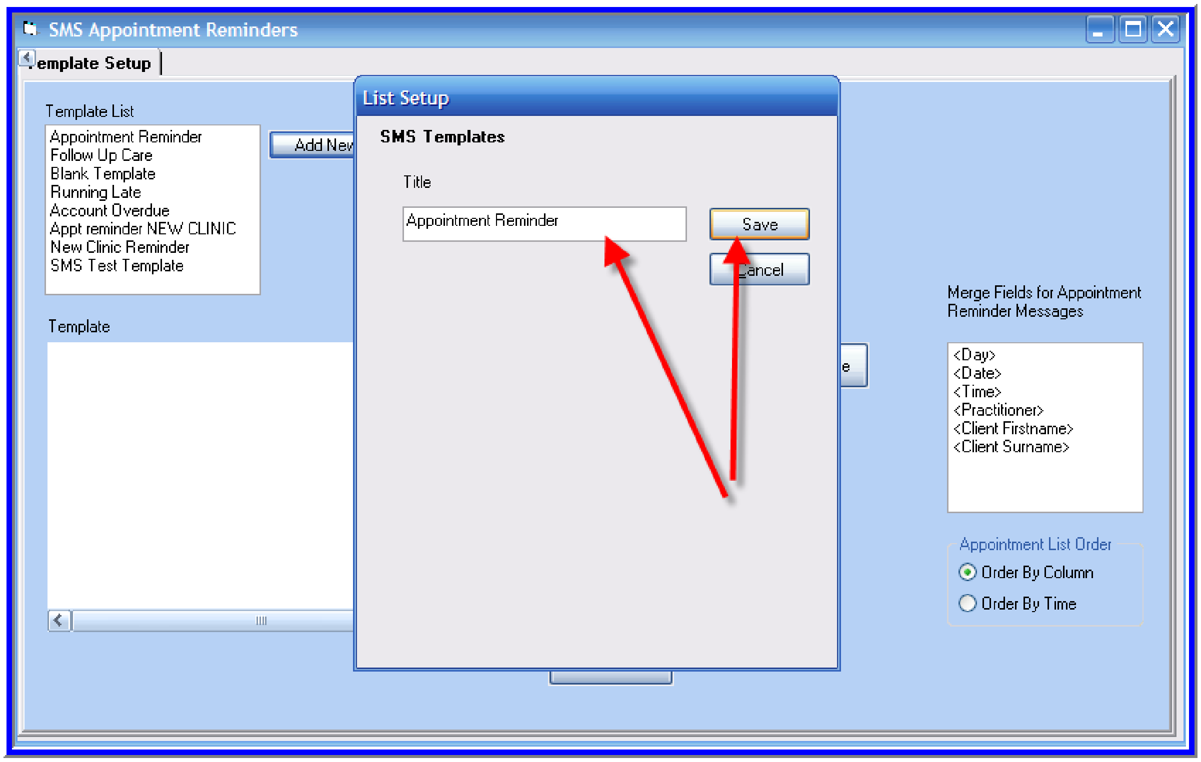
- Go to SMS Template Setup



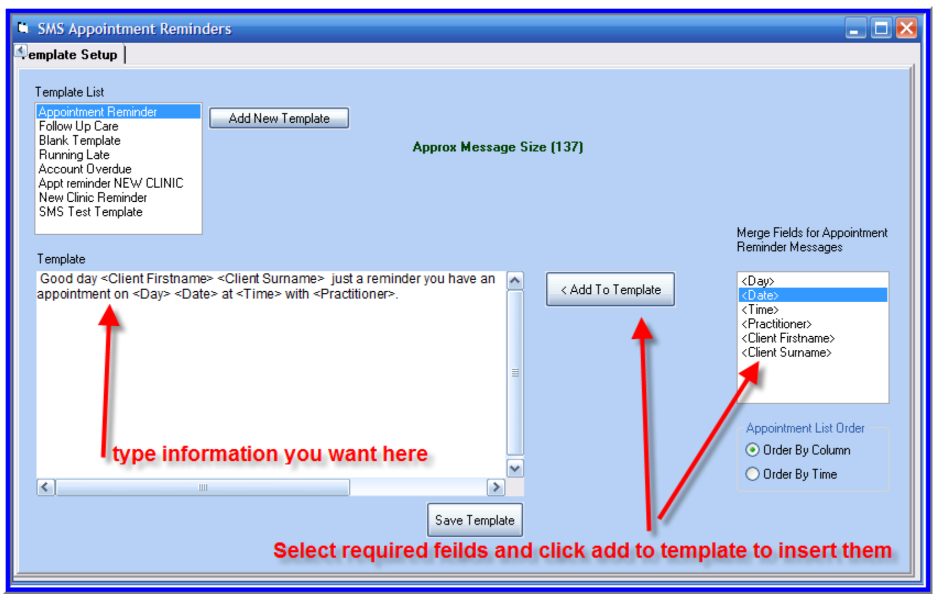
- Click Add New Template



- Click Add

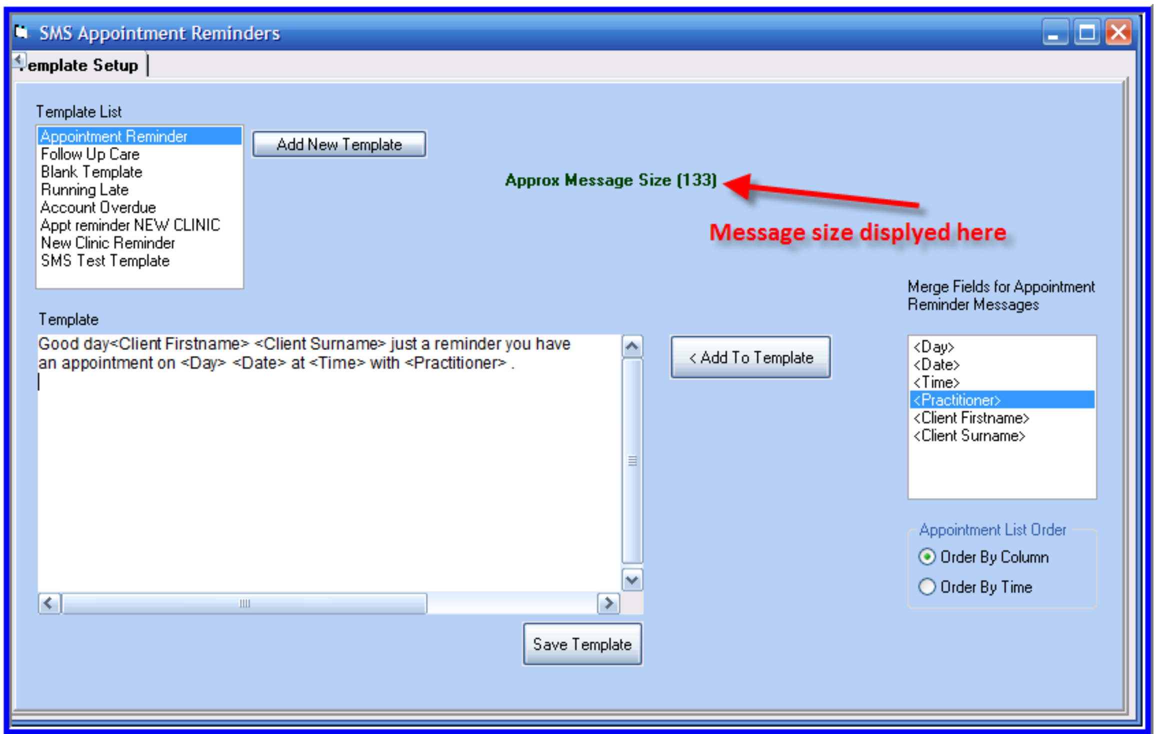


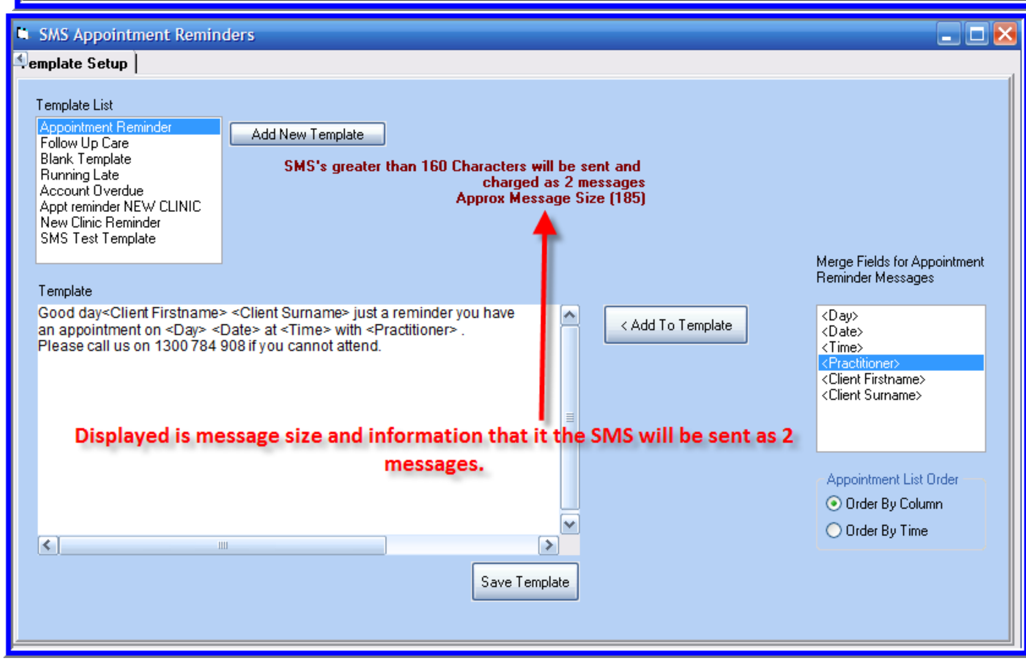
- Type in title for new SMS template
- Click save



- 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)

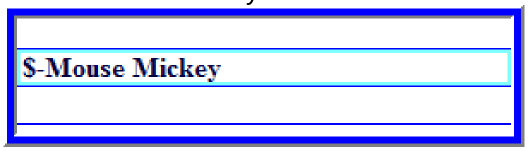

SMS Appointment Reminders
Template Setup
Template List
Appointment Reminder
Follow Up Care
Blank Template
Running Late
Account Overdue
Appt reminder NEW CLINIC
New Clinic Reminder
SMS Test Template
Add New Template
Approx Message Size (133)
Message size displyed here
Merge Fields for Appointment Reminder Messages
Template
Good day<Client Firstname> <Client Surname> just a reminder you have an appointment on <Day> <Date> at <Time> with <Practitioner> .
< Add To Template
<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)
Merge Fields for Appointment Reminder Messages
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
<Day>
<Date>
<Time>
<Practitioner>
<Client Firstname>
<Client Surname>
Displayed is message size and information that it the SMS will be sent as 2 messages.
Appointment List Order
Order By Column
Order By Time
Save Template

30.2 How to send an SMS

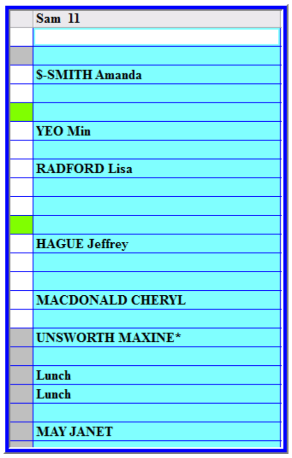
There are a number of ways to send an SMS.

- First select the patient or patients you with to send an SMS to.
- Either individually

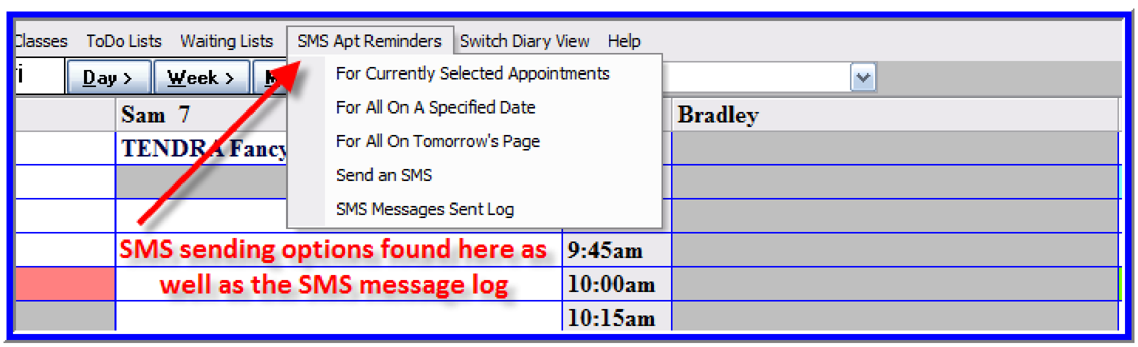


OR

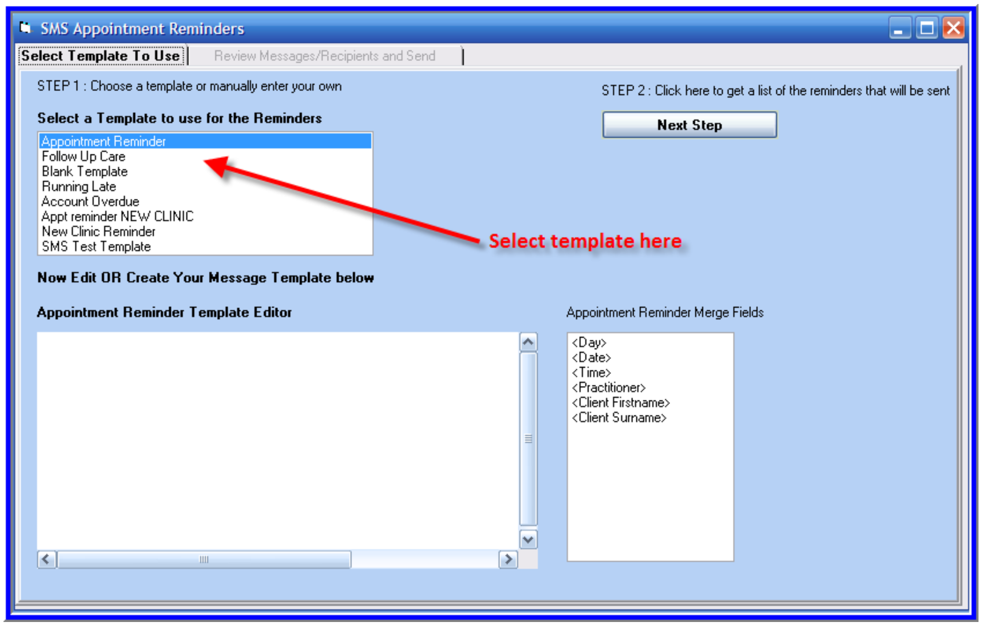
- Select the whole column by clicking on the practitioner name. (The whole column will be highlighted.)



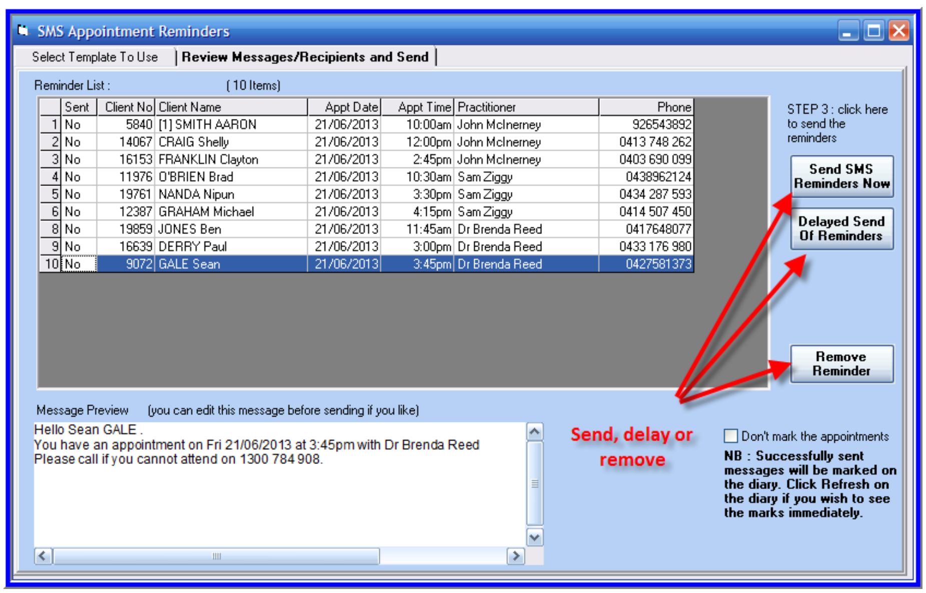
- Next on the PPMP® Diary page you will see the menu SMS Apt Reminders.



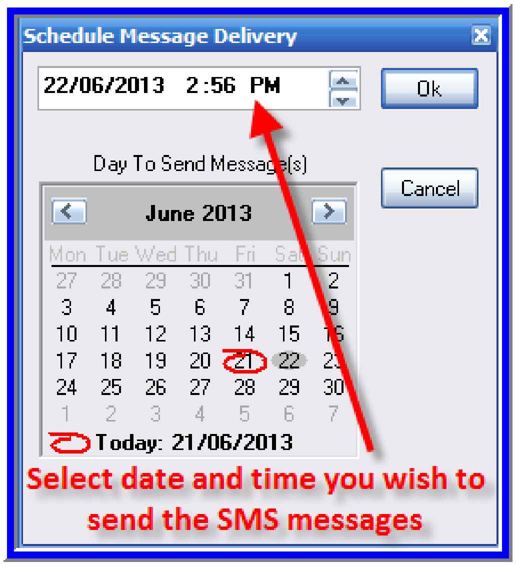
- The top 3 options will bring you up the template window that you have already set up.



- Select the specific template you would like to use (or you can build a new one if needed here)
- Click Next Step.



- 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

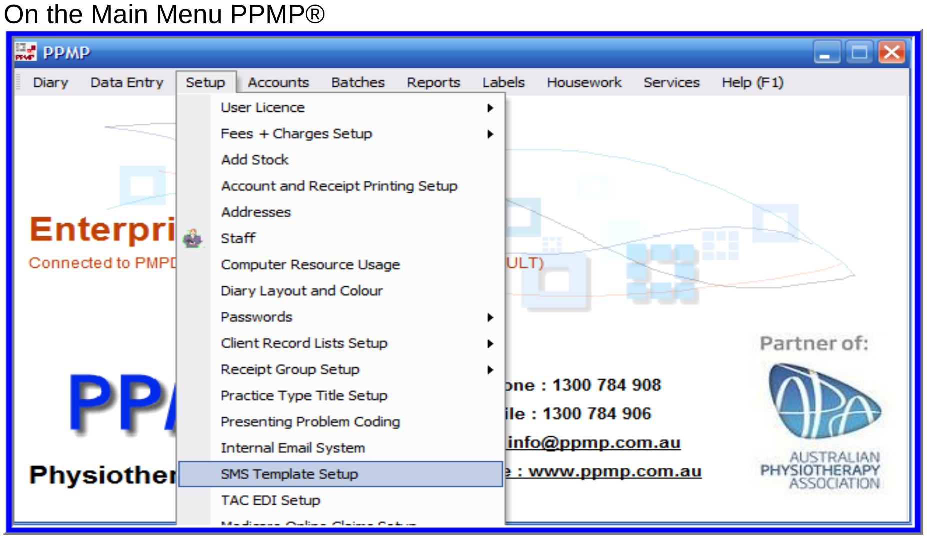
Click HERE to watch video

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.

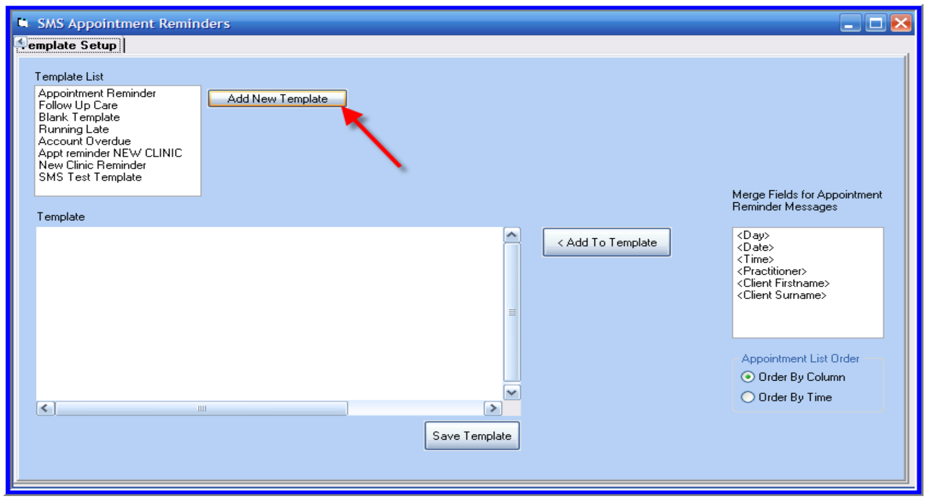
30.4 Design SMS templates and sending of SMS

First design the template to be used

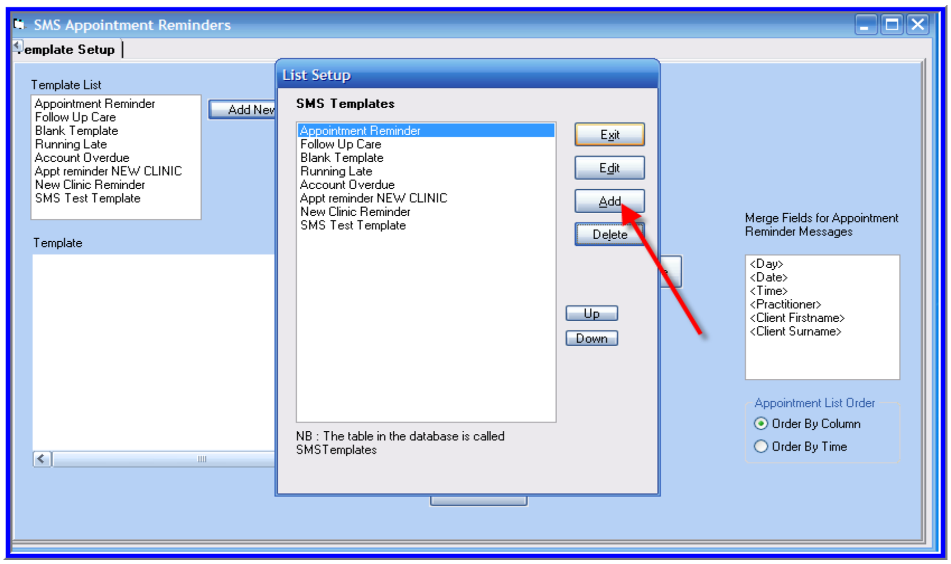
On the Main Menu PPMP®



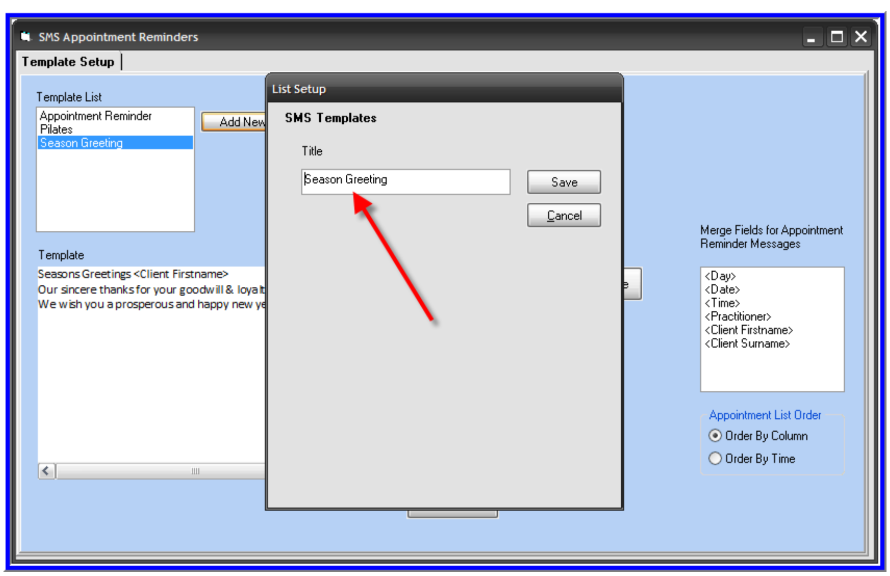
- Go to SMS Template Setup



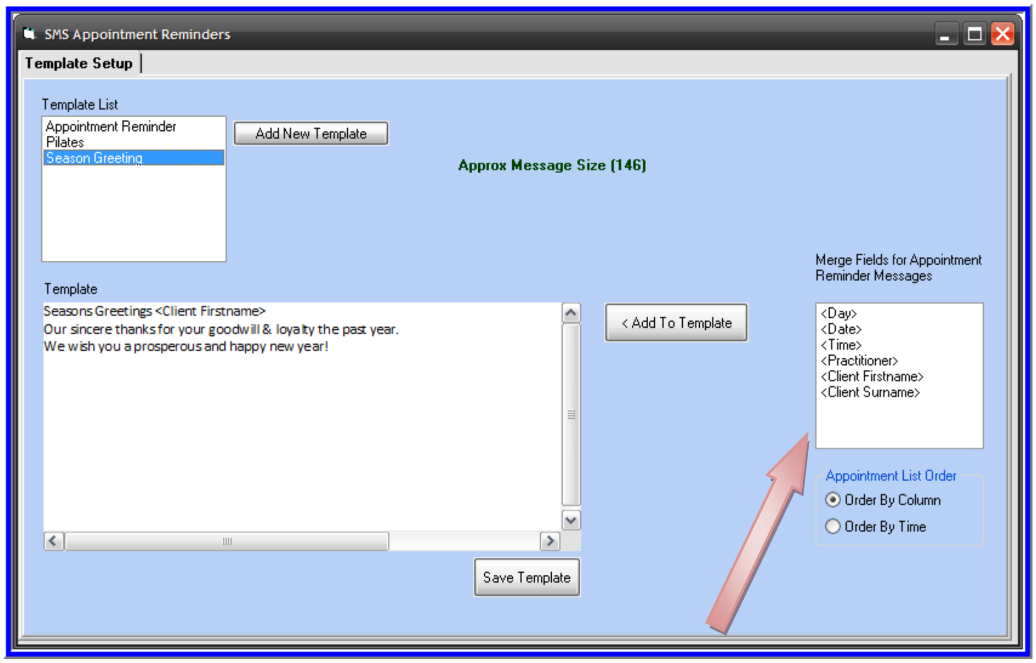
- Click Add New Template



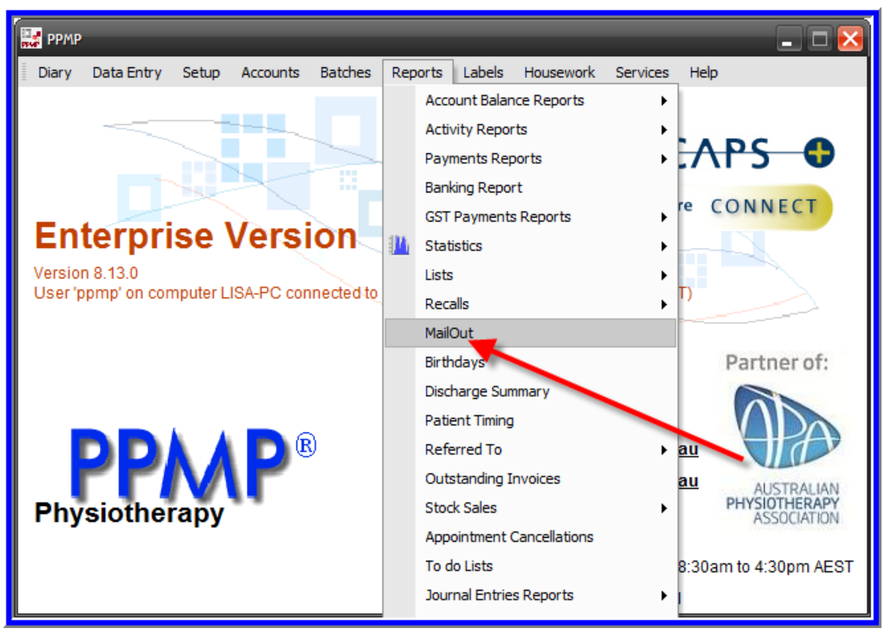
- Click Add



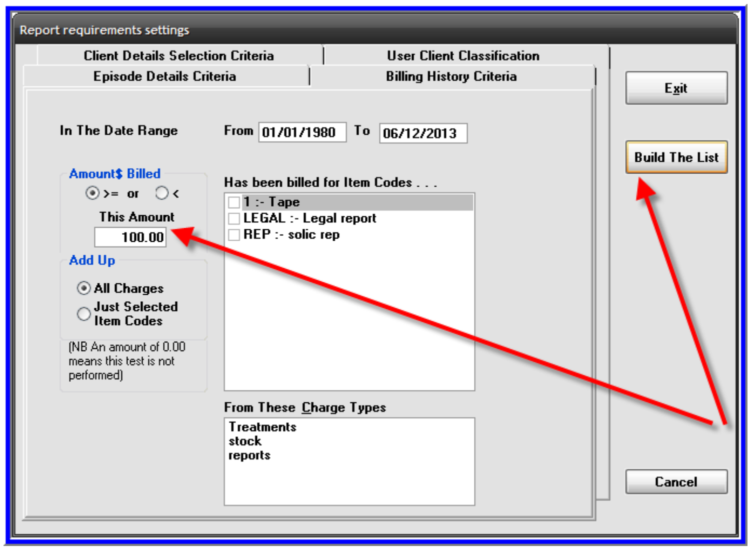
- Type in title for new SMS template
- Click save



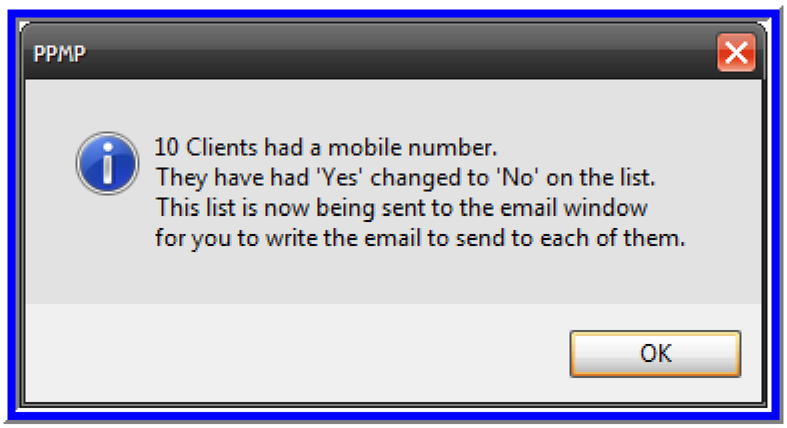
- Select the template in the list you want to setup and type in the information you require (or select from the merge fields on the right)
- Remember the size of the template will depend on how many sms message are sent. (Anything over 160 characters will be charged and sent as 2 sms messages.)
- Click save template.



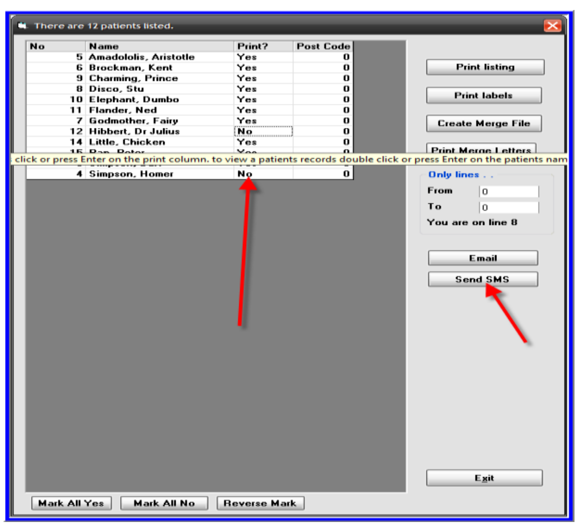
- Go to the reports screen and select the MailOut option



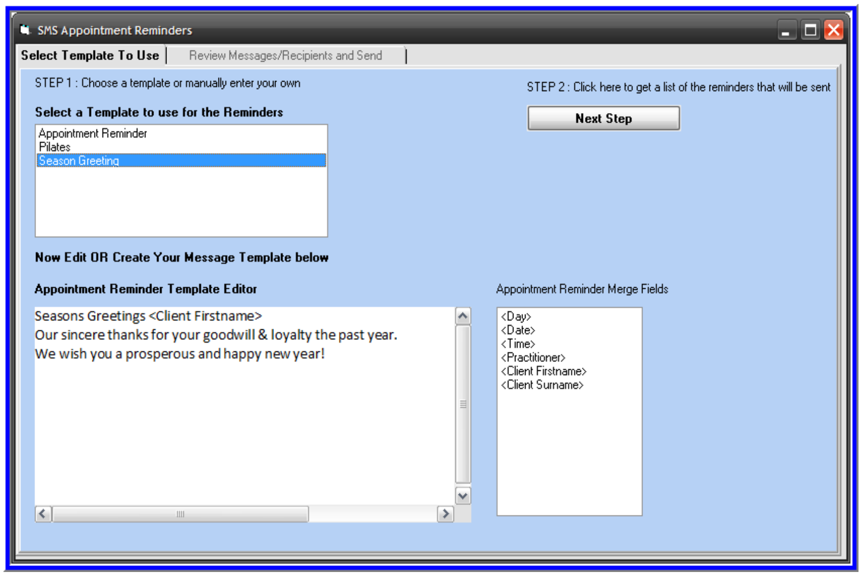
- Select the required Filters Tab / Fields
- Click Build List



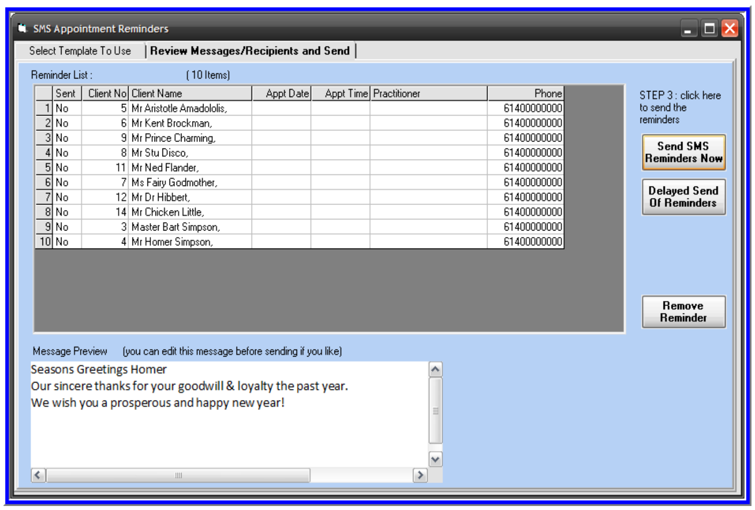
- You will receive a message telling you how many clients had mobile numbers
- Please check with us if you are sending over 1000 sms messages in a day as limits may apply.



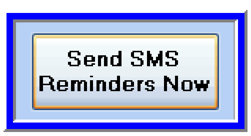
- You will notice on your list that those who have mobile numbers have had Yes changed to NO (this is so those that don't have mobile numbers can be contacted by an altenate method)
- Click Send SMS



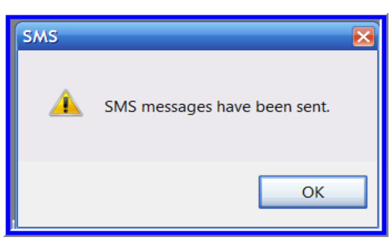
- Select your Template
- Click Next Step



- 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”)



- Once you have checked the mobile numbers and you have selected the correct template – Click Send



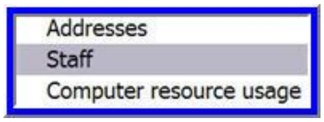
- You will receive the above message when SMS’s have been sent

31 Staff setup (additional information)

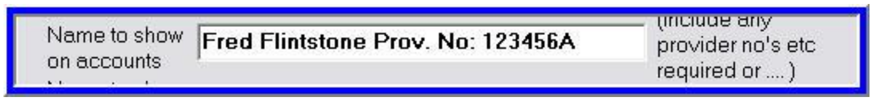
Click HERE to watch video

On the main PPMP® Screen

- Click Setup



- Click on Staff (we have already setup most of this in the wizard setup).

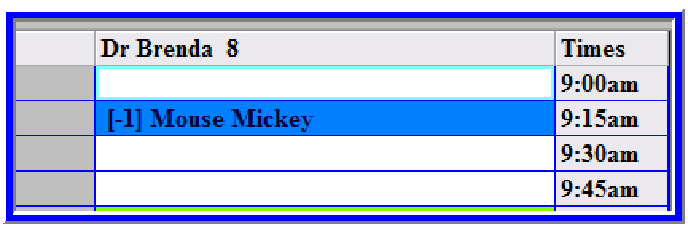


- In Name to show on Accounts we need to insert the Practitioners Surname and Provider Number

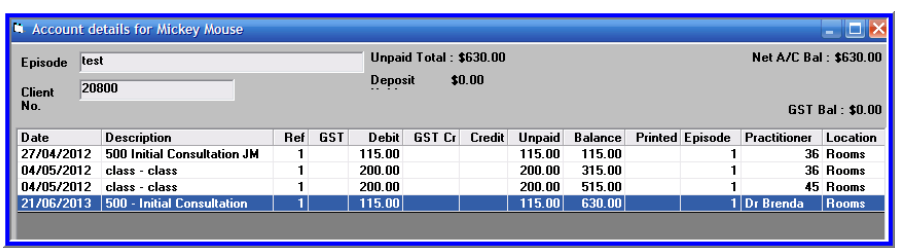
- Click Save

- Click Exit.

31.1 Setting staff names on columns



- 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.



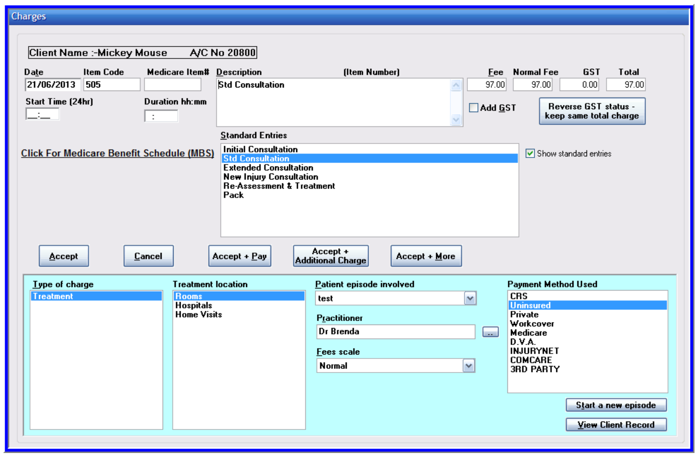
Account details for Mickey Mouse

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

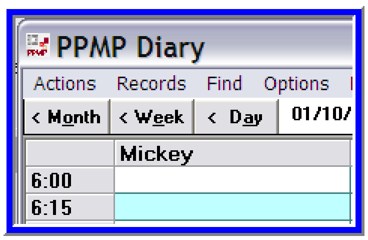
- When you record a treatment from the diary, the practitioner whose name appears at the top of that column is credited with having treated that patient.



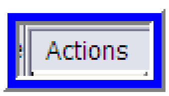
- When you are in the charge window you will see a setting at the bottom of the charge window for the practitioner, episode, etc. these can be changed by clicking on drop down buttons or clicking on a different location.

31.2 Changing practitioner on the diary

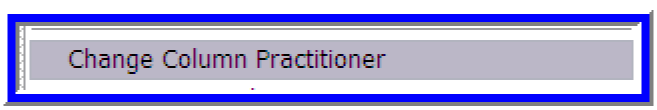
You can change the name allocated to a particular column on a particular day.



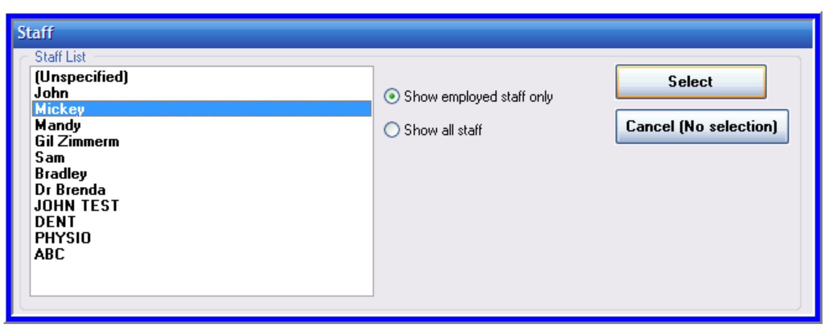
- Click in the first column.



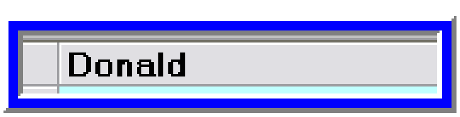
- Then click Actions



- Change Column Practitioner



- Click on the practitioner's name then click 'Select'



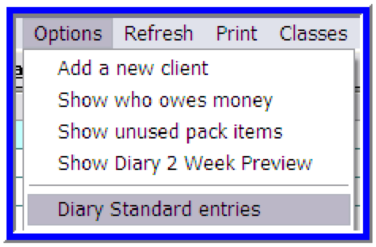
- The name will then appear on the diary in that column on that day.

32 Standard entries

Click HERE to watch video

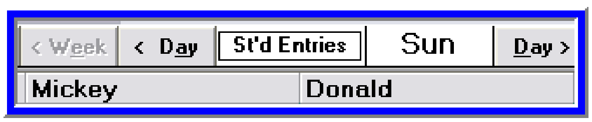
Setting up a standard or default diary layout

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"

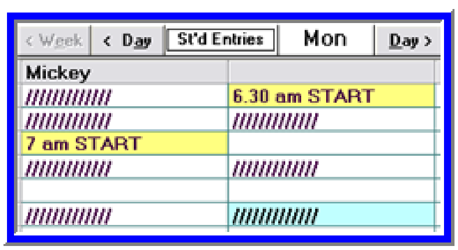


- Choose Diary Standard entries

- The diary will jump to the Sunday of the standard layout area.

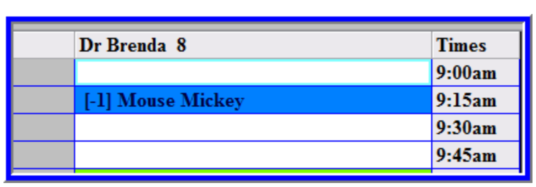


- Allocate staff to each column on each day from that Sunday through to the following Saturday.



- 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.

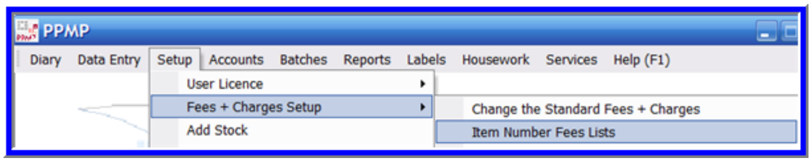


- NB These changes will only be reflected in days more than 14 days in the future from today. Days on the diary more recent than that will need to be individually adjusted

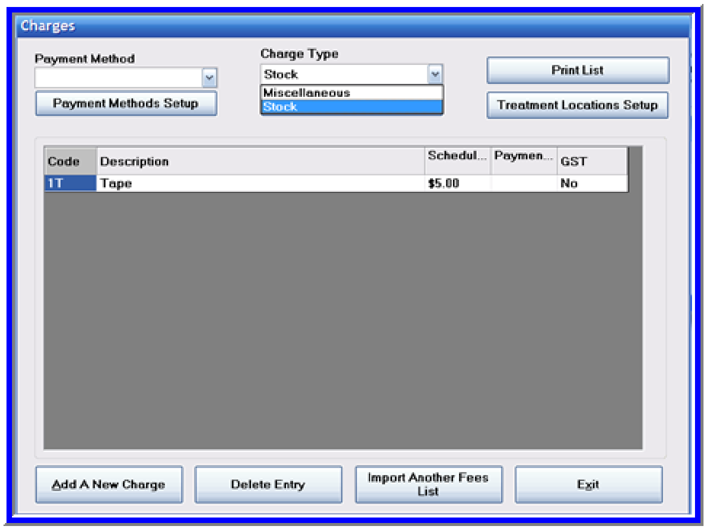
33 Stock - Additional fees & charges

Click HERE to watch video

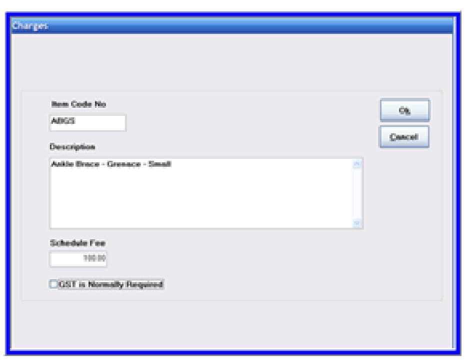
Main Menu PPMP®



- Click Setup
- Click Fees & Charges Setup
- Click Item Number Fees List (This is where you set up your stock list)



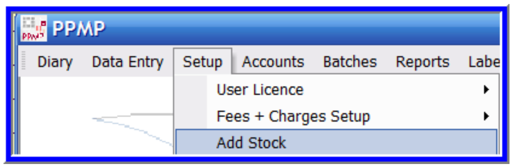
- Make sure you select the correct “Charge Type”
- Click Add a New Charge



- 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.

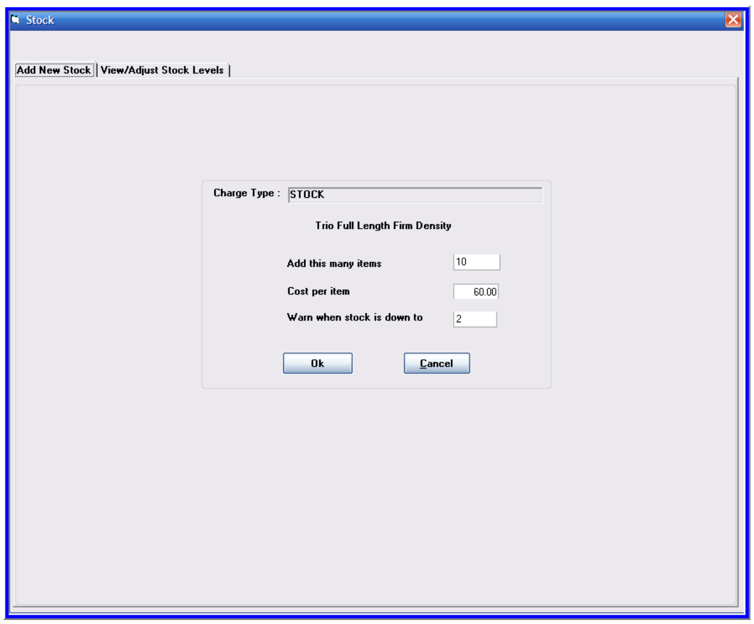
33.1 Add stock amounts

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.



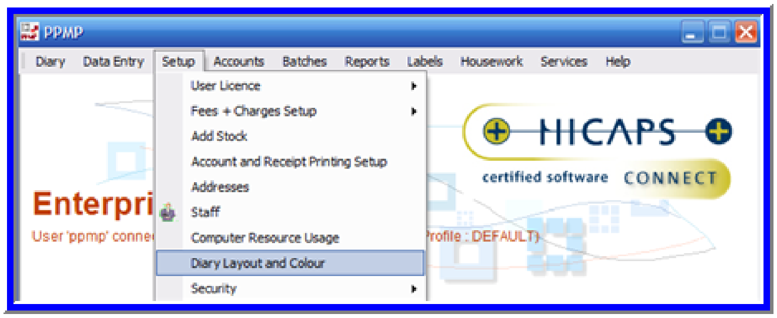
- **Add this many items** - In this field you add the number of stock you have just received.
- **Cost per item** - In this field enter the cost **you paid** for each item.
- **Warn when stock is down to** - In this field you enter the number of stock at which you wish to be warned that the number of 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.

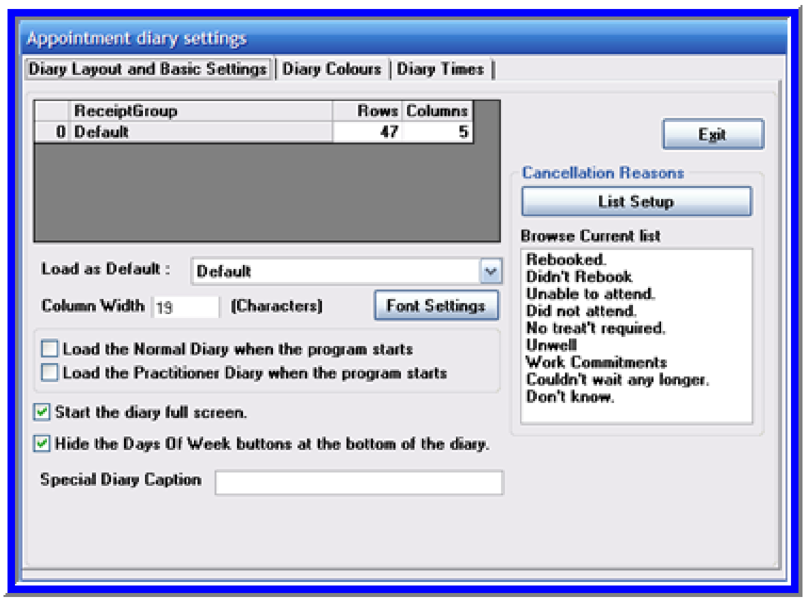
On the reports menu you will see reports listed for stock items, sales, and stock on hand etc.

34 Times columns - adjusting/inserting

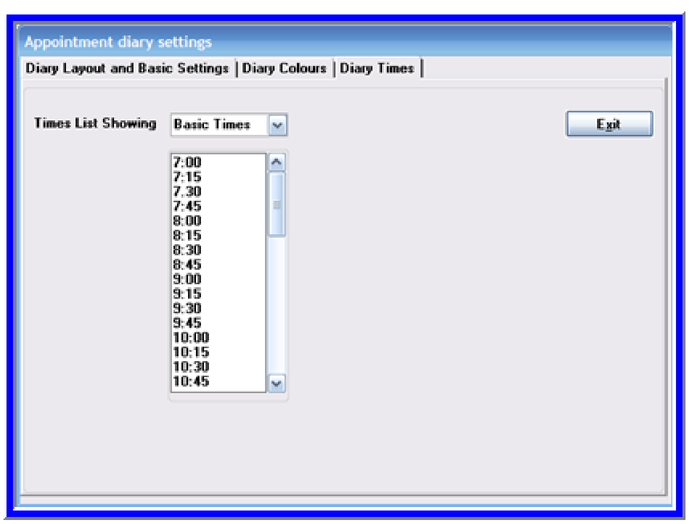
From the Main screen of PPMP



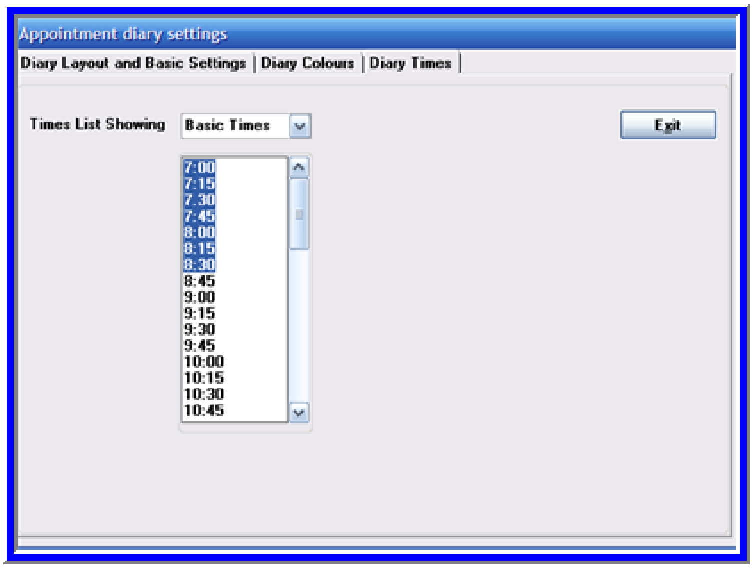
- Go to Setup
- Diary Layout & Colour



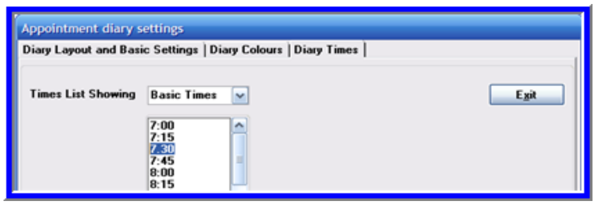
- Add Additional Columns or Rows
- Click on Diary Times Tab



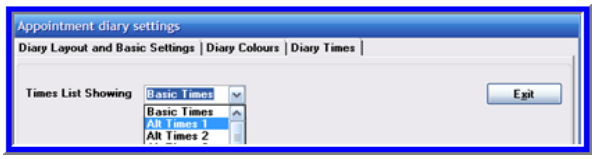
- The Basic Times column relate to the times on the left hand side of your diary
- You can adjust the times by inserting or deleting times



- Highlight a group and Delete

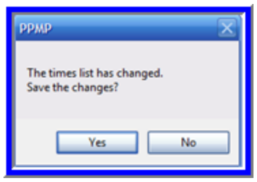


- Or highlight individual times and Delete
- Or over ride with new times

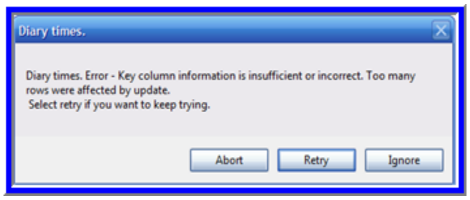


- Click on drop down arrow and select an Alternate Times

- Add the times you want (10 mins, 15 mins, etc)
- Click Exit (when you have finished inserting/deleting times)

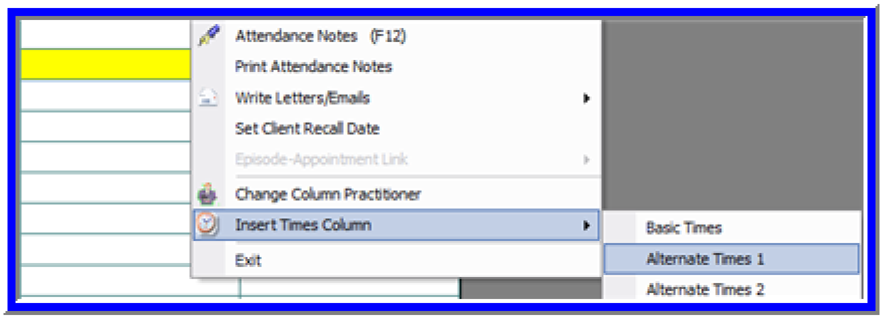


- Click Yes



- 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).



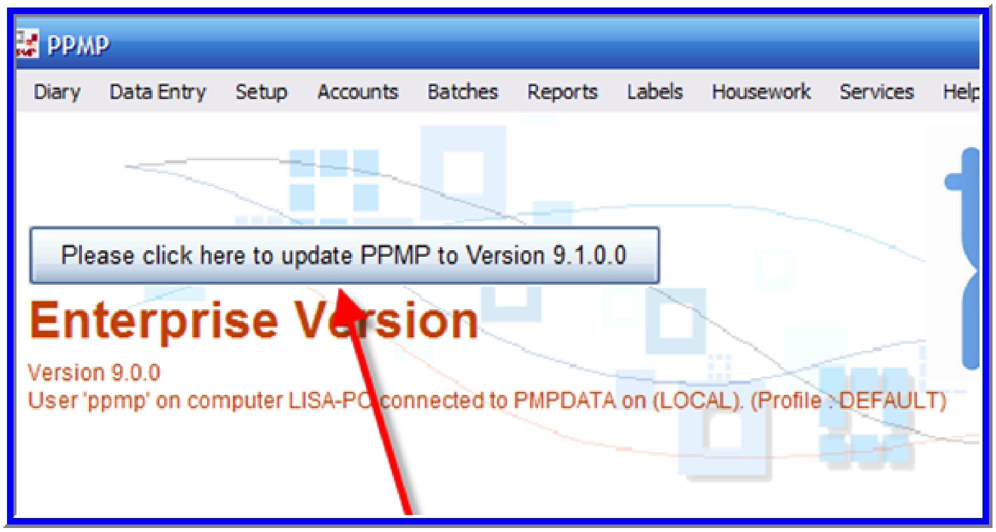
- Right click in the column you want to make a "Times Column"
- Select Insert Times Column
- Select Alternate Times (that you created)

35 Upgrade PPMP®

(MAKE SURE ALL OTHER APPLICATIONS ARE CLOSED - Including any Word documents, emails, etc.)

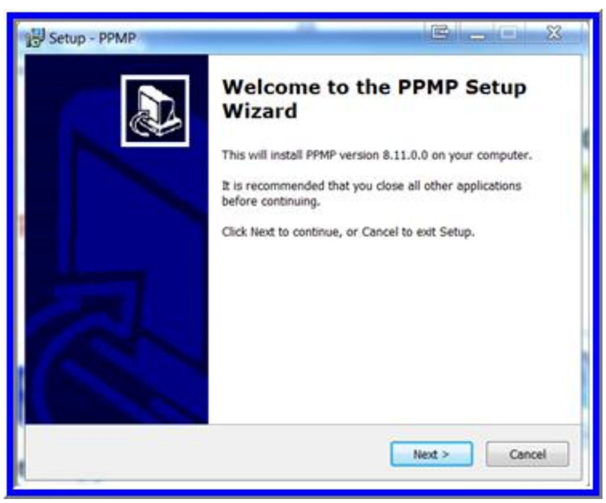
When an update is available for PPMP® the main screen of PPMP with display the

On the Main Screen of PPMP®

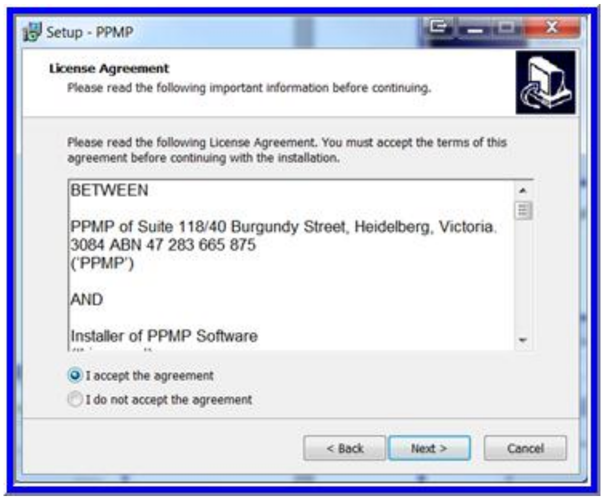


- Click Help
- Select Check for Updates

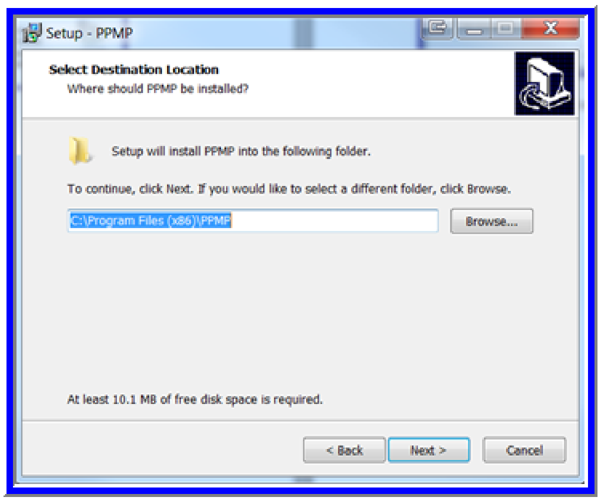
- Program is connecting to PPMP® Server & Downloading Files



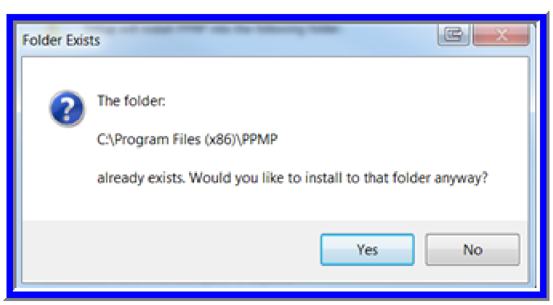
- Welcome Wizard will display PPMP® Version number that will be installed on your computer
- Click Next



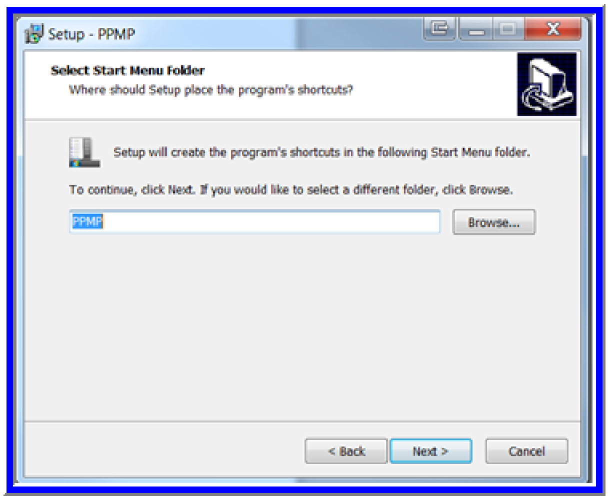
- Click I Accept the Agreement
- Click Next



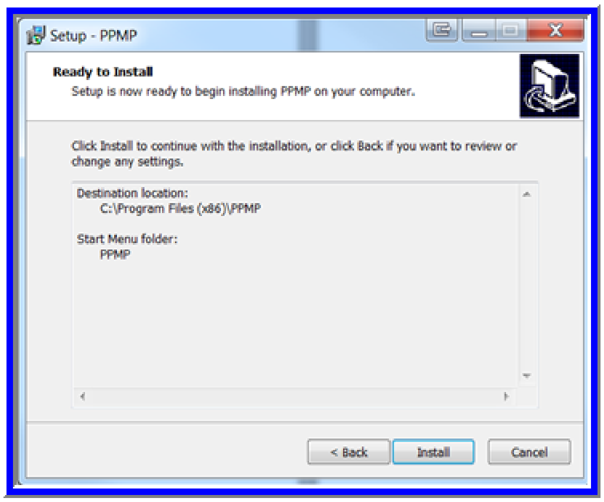
- Click Next



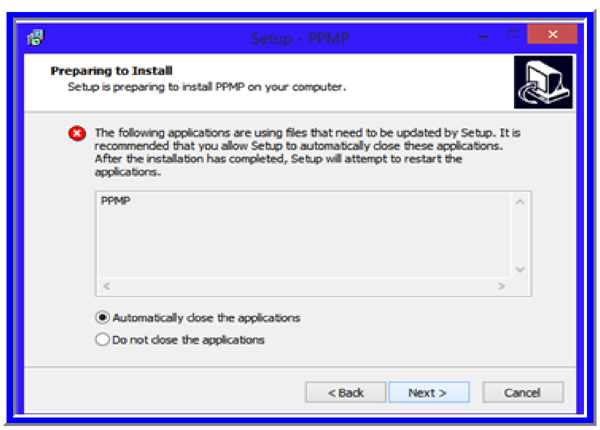
- Click Yes



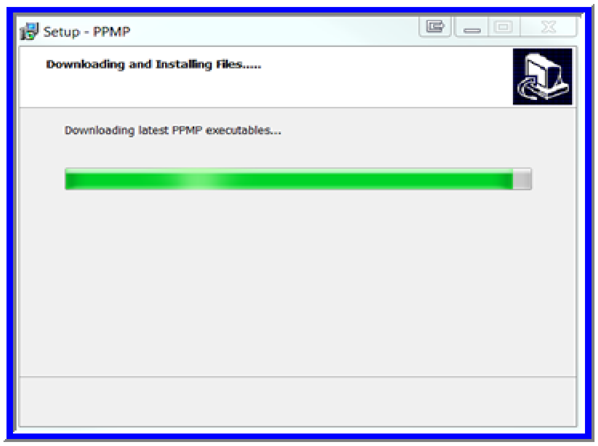
- Click Next



- Click Install



- Click Next



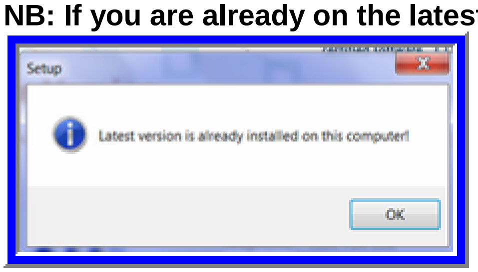
- Downloading and installing files ... please wait

- 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

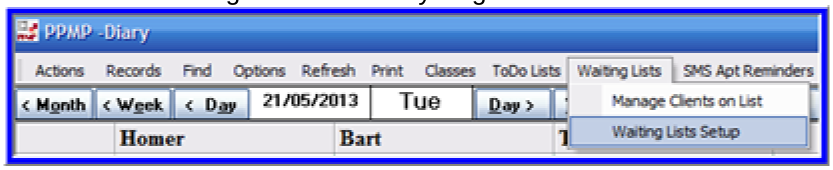


- Click OK

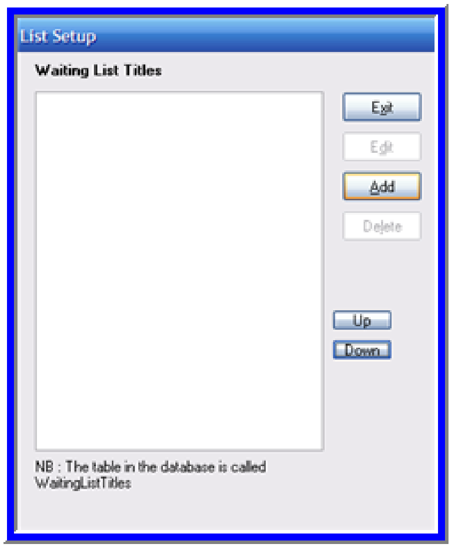
36 Waiting lists

Click HERE to watch video

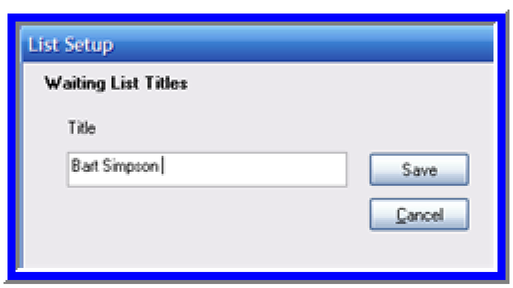
To Create a Waiting list on the Diary Page



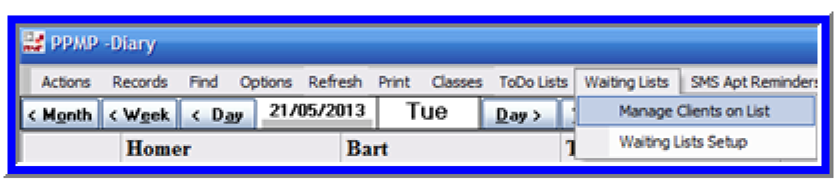
- Go to Waiting Lists
- Waiting Lists Setup



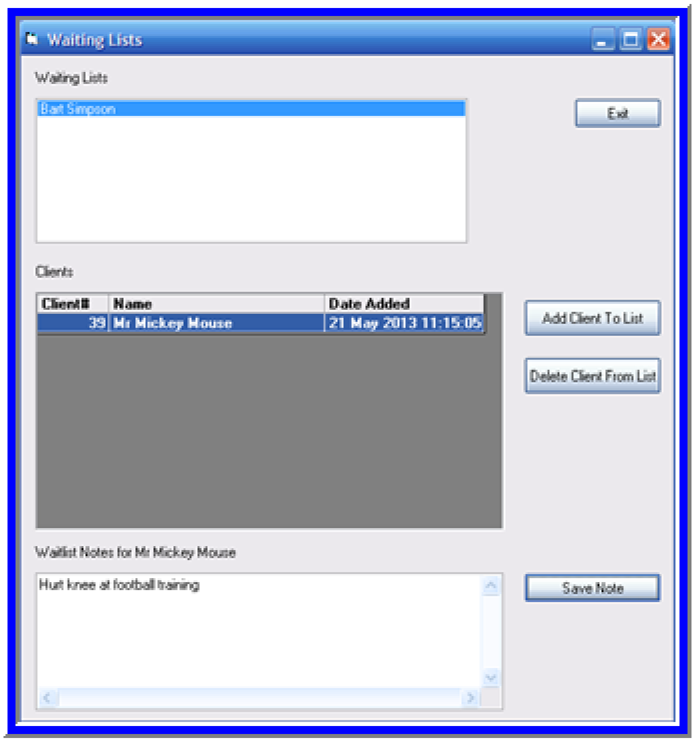
- Click Add



- Enter in List Name
- Click Save
- Exit



- On the Diary Page
- Click Waiting Lists
- Manage Clients on List

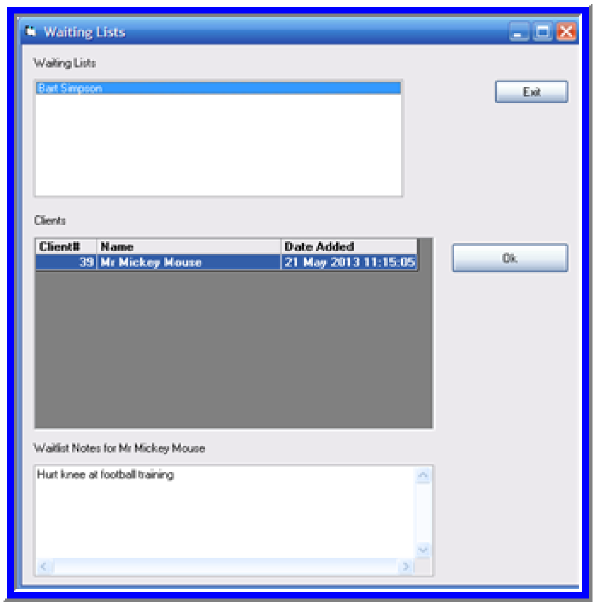


- Select Waiting List Title
- Click Add Client to List
- Add any notes referring to this client
- Click Save Notes
- Exit

<u>When Appointment becomes available</u>

- Select Appointment Time on Diary

- Click Actions
- Select Appointment from Waiting List



- Select List Title
- Select Client
- Click OK

- Client is transferred from Waiting List to Appointment on the Diary