private
practice
software

Reference Guide

Private Practice Software Version 4

Welcome to the PPS Reference guide – your PPS Encyclopaedia! You can use this guide as a constant reference for any area of PPS that you are unsure of. This guide is packed full on entries, all listed alphabetically including many cross references to other parts of the guide. If you cannot immediately find what you are looking for, try broadening your search – for example If you are looking for details about C*ompleting an Activity record* and you can't find the entry under *Completing…* then try looking under *Activity* where you will find the details you are looking for.

A

Access Control
PPS includes full access control for each of the PPS Users that have their own Log In set up. To set up or change the access control settings for each user (you must first be logged in as the System Administrator) select the following: PPS Menu: 1) Tools – Set Up System Users. 2) Select a User from the list and press Modify. 3) press the <Settings> button in the Access Control section. The Access Control screen allows you to select which level of access is allowed to each part of PPS (such as Client details, Accounts, Reports, Appointments etc.). The settings for Access Level include: Adding records, Updating records, Deleting record, Printing, Previewing etc. This enables you to set up a detailed profile of access for each of your users.

Accessing PPS
See: Logging In

Accounts
The PPS Accounts system includes facilities for you to bill your clients, or third parties, record payments received, and manage all invoices that are overdue for payment. In addition, PPS also offers an additional module called PPS Expense that can be used to record details of practice expenditure. The Accounts system in PPS is not designed to be a full accounts system with ledgers, balance sheets, etc. but it can be used to supply revenue and expenditure information directly to another accounts system by way of exporting the information through reports.

PPS Accounts billing is structured into three areas: Charges, Invoices and Payments. Firstly Charges must be created, then an invoice produced, then a payment recorded. A Charge, or charges simply become "line items" on an invoice, and a payment recorded is "allocated" to the invoice. PPS is flexible enough to accommodate all requirements for practice billing including third-party billing, split billing (between client and third party), recording several payments against one invoice, or recording one payment against several invoices. There are various points throughout PPS that enable charges to be quickly created and "paid off" in one step. This single step still produces the correct Charge, Invoice and Payment records.

See below for further detailed information relating to the various Accounts functions in PPS.

Accounts – Aged Debtors
See: Aged Debtors Report

Accounts - Charges
See: Charges

Accounts - Invoices
See: Invoices

Accounts - Payments
See: Payments

Accounts – Printing
The PPS Accounts screen is accessed from the PPS Menu: Accounts – Accounts. When you select the Print button on the Toolbar, you have a choice of printing options. You can print a Statement of Account, an Invoice or a Payment receipt. Note that Payment Receipt is only available when you have highlighted a "payment" type transaction in the transaction list (in the main portion of the screen). A Payment receipt is a simple full page printout that shows the value of the payment, the payment method, the date, and "paid with thanks". It does not replace an invoice which shows full details of the charges included on the invoice and details of payments allocated to the invoice. The payment receipt is useful to print if a receipt is required for a payment received and the payment has not yet been allocated to any invoices. When an invoice is printed, it can show details of all payments received that have been allocated to the invoice. If the invoice is fully paid, it can be considered as a "Receipt" when printed

Accounts - Statement of Account
A Statement of Account can be printed for any selected client or third-party account. This will show all, or a range of, transactions on the client account, and an outstanding balance. The statement layout can be customised to suit your own layout requirements if required (see: Statement Layout Designer). The statement is designed to be printed and sent to the client (or third-party) as a reminder of an overdue account and will include a list of invoices outstanding, and (optionally) will include a list of payments received so far.

To print a Statement of Account, select the PPS Accounts screen using the PPS Menu: Accounts – Accounts, or by clicking Accounts on the Task bar. Select the required account (client or third party), select the <Print> button on the top toolbar and select "Print Statement of Account". You can then select a date range if required before printing the statement. Before selecting the <Print> button, you can select if past items are included on the statement or just outstanding items using the <History> button in the bottom left corner of the Accounts screen. Before printing, you can also select to "Record Statement Print in Client Log". This will create an Activity record in the client log showing that the statement has been printed.

Accounts Report
The Accounts report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Accounts Reports section". The Accounts report provides a consolidation of your Charges, Invoices and Payments records all on one report. You can either select to produce a summary level report, or a detail level report that shows one line per transaction. PPS allows several charges to be included on one invoice, and several payments (if necessary) to be allocated to an invoice – because of this the transaction level report can include a large amount of detail. Each line item on the report shows the lowest level of detail necessary to provide the correct breakdown and sub-total options. If an invoice has three charges on it and the invoice has two payments allocated to it, then each of the charges shown on the report will be split between the two payments: giving six lines on the report; each charge showing the proportional payment amount against it. By preparing the report in this way, you have full flexibility to breakdown the report on a much wider variety of fields, as not all fields are *just* related to payments, or *just* related to charges. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Action
See: Personal Action

Activities
Activities in PPS are a way of keeping a record of contacts, telephone calls, letters, etc. that you have with your Clients or Third-Party contacts. Activities can all have a specific PPS User, and Practitioner assigned to them, and can be scheduled for completion in the future or immediately. Activities appear in the Client Log for each client, as well as on the Activities List and the Task List. A System of colours is used to denote activities that are: Due – Green; Not yet due – Orange; Completed – Purple and Overdue (task list only) – Red.

See Also: Activities – Activity Types

Activities - Activity Types
The various types of Activity records in PPS are: Letter, E-Mail, SMS Message, Personal Action (To Do item), Contact Note,

Telephone Call, Message (internal message to another PPS User) and Label (mailing label). You can create an activity record from the PPS Menu: Activities, then selecting the relevant option, e.g. Send a Letter. You can also use the Task Bar to quickly create common activities such as Letters and E-Mails. For further details about each activity type, see the entry in this reference guide under each type e.g. Letters

Activities - Archiving
Activities can be "Archived" when they are completed. This process takes place as part of running the Re-Index option of the PPS Menu: Tools – Database maintenance. You can decide how old your completed activities need to be before they are archived by using the PPS Menu: Tools – Options. Here you can specify the "number of weeks an activity has been completed for" before it is archived. Archived activities appear in the "Archived Activities List" from the PPS Menu: Activities, and not in the Activities List. Archived activities also still appear in the Client Log screen.

Activities - Due Date
All PPS Activities have a Due Date. This date is either "today" if the activity required completing immediately, or a date in the future when the activity will become due for completion. The Task List and the Activities List both respond to the Due Date by showing activities that are now due in Green, overdue in Red (task list only) and completed in Purple. On the activities list, you can select which status types to include in the list. If you need to Postpone an activity, this will reset the Due Date to a date in the future, and make a note of the original due date in the notes field. *See Activities – Postpone* for further details

Activities – Completing
Each activity type in PPS has an "Outcome" section at the bottom of the activity screen. To complete an activity, you simply need to enter the outcome details. When you type some text into the Outcome field, then the date and initials are entered automatically. On the PPS Task List, you can simply "tick" an activity as completed. On the pop-up notify window, you can complete an activity by selecting the <Dismiss> button.

Activities – Postpone
All of the PPS Activities screens allow you to postpone an activity. You can also postpone an activity that is shown on the "Pop-up" Notify window. To postpone an activity, use the small <Postpone> button located in the bottom left corner of the activity screen. You can select to postpone an activity for *n* minutes, hours, days, weeks, months, years. When you postpone an activity, an entry is made in the notes of the original due date and time. If you postpone an activity from the pop-up notify window, then the activity will pop-up again when it becomes due.

Activities – Priority
All PPS Activities can have a Priority assigned. This is used in the Task List and in the Activities List as a visual indication of which ones you have assigned a higher, or lower priority to. The priority settings available are 1, 2 and 3.

Activities – Status
Activity Status is whether an activity is due in the future, now due or completed. A System of colours is used to denote activities that are: Due – Green; Not yet due (future) – Orange; Completed – Purple and Overdue (task list only) – Red. You can select to include any or all of these types on the activities list. The task list will only show activities that are overdue, now due and completed today.

Activities – Time
An Activity can optionally have a "Due Time". This means that at the exact "time" when the activity becomes due, you will be notified via a pop-up message on the screen. You can then select to process the activity, or postpone it. See *Users – Setting Up* for details of how to check for messages and activities.

Activities List Report
The Activities List report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Activities Reports section". The activities list allows you to list your activity records for a variety of selections including "activities now due" or "completed activities". You can also select just to include selected activity types such as Letters. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Add
Look this up under the type of new record you want to add – e.g. Client - Add or Appointment - Add

Address
See: Client - Address

Address Labels
See: Labels

Administrator
See: System Administrator

Aged Debtors Report
Aged Debtors are Clients or Third-Parties that owe you money. Based upon the date of an invoice, if the invoice has not been paid, then this is a debt owed to you. The longer the invoice remains unpaid, the older (or more "aged") the debt. A common standard accounting system report is the Aged Debtors report.

The Aged Debtors report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Accounts Reports section". An Aged Debtors report is a special type of report that shows all of your "Un-Paid" (or part paid) invoices. The report is divided into groups depending upon how outstanding, or overdue, the invoice is. The standard groups are: Current 0 to 30 days, 30 to 60 days, 60 to 90 days and over 90 days. You can change these intervals yourself when printing the report if required.

PPS can also produce aged debtors letters. These are normally used when the invoice has remained unpaid for a long period of time. The letter will typically give details of the amount that is overdue and (politely!) ask for payment to be made. PPS has the option of producing letters, or a report using the same menu option.

To produce an Aged Debtors report, or Letters, select from the PPS menu: Reports – Reports and Summaries, then from the Accounts Reports section select Aged Debtors Report / Letters. For more details on the selections you can make on this report, *see: Reports – Aged Debtors Report.*

All Treatments
See: Clinical Notes Summary

Allocate
See: Payments - Allocating

Alternative Address
See: Client – Prime Contact Details

Amend
See: Modify under the type of information you want to Modify e.g. Appointment - Modify

Annotating
See: Charts - Annotations

Annotation
See: Charts - Annotations

Annotation Marker
See: Charts - Annotations

Appointment
An Appointment is an entry in the Appointments Diary for a client. When you set up your diary, you are setting up the free appointment slots. You then book Appointments into these free slots. Each Appointment can be marked with a status, represented by a colour, to show that the client has arrived for their appointment (green), is currently being seen by the practitioner (orange) or the appointment is completed (purple). You can also mark an appointment as DNA (did not attend) and select a reason why the client has not attended – these are marked in red. When booking an appointment on the diary, this is normally done by highlight a free slot then selecting to add the new appointment. When doing this, the appointment details such as date, time, duration, diary user, treatment room, etc. are already known and you do not have to enter them.

See below for further details on dealing with Appointments in your diary.

Appointment - Adding a New Appointment
See: Appointment - New

Appointment - Appointment Type
Each Appointment can optionally have an Appointment Type assigned to it. When adding a new appointment (or modifying an existing one), the appointment type can be selected from a "drop down" list of appointment types. You set up your own list of appointment types using the Look Up Tables option of the PPS Tools menu. Assigning appointment types to appointments has several advantages – firstly the appointment type can be displayed on the diary alongside the client details to show you what type of appointment the client is attending for. Secondly, the appointment type can be used to specify what charge is being made for the appointment. This can save some time when creating the charge for the appointment, as the charge code is already selected for you. Finally, appointment types can be used when running reports to show you a breakdown of the various appointment types – this can be useful for revenue or statistical breakdowns.

See Appointment Types for a description of setting up appointment types.

Appointment - Arrived
You can mark an appointment as "Arrived". This means that the client has arrived and is waiting to be seen. This is a very useful indicator if the practitioner is also using PPS in the treatment room, as their own diary, or daily appointments list screen can refresh automatically and they will see that the client has arrived. This is done using a "green" highlight on the diary (either a highlight LED next the appointment, or the client's name changes colour – depending upon your preferred diary display options). To mark an appointment as Arrived, you can do one of 5 things (you choose your preferred method!). From the diary, you highlight the appointment and either: 1) double click the appointment and tick the "Arrived" box in the appointment details window, 2) right-click the appointment and select "Arrived" from the pop-up menu, 3) select the "Diary" option from the main PPS menu and select "Arrived", 4) click on the "Arrived" button on the diary screen (towards the top right of the diary), or from the Daily Appointments list you can 5) highlight the appointment and click in the "Arrived" column (displayed as "Arr." to save space!).

Appointment - Being Seen
You can mark an appointment as "Being Seen". This means that the client has arrived and is now being seen by the practitioner. This can be used as an indicator on the diary screen where in a busy waiting room you can monitor where you are up to! Clients that are Being Seen are shown in a "green" highlight on the diary (either a highlight LED next the appointment, or the client's name changes colour – depending upon your preferred diary display options). To mark an appointment as Being Seen, you can do one of 5 things (you choose your preferred method!). From the diary, you highlight the appointment and either: 1) double click the appointment and tick the "Being Seen" box in the appointment details window, 2) right-click the appointment and select "Being Seen" from the pop-up menu, 3) select the "Diary" option from the main PPS menu and select "Being Seen", 4) click on the "Being Seen" button on the diary screen (towards the top right of the diary), or from the Daily Appointments list you can 5) highlight the appointment and click in the "Being Seen" column (displayed as "In" to save space!).

Appointment - Block
See: Block Appointment

Appointment - Completed
You can mark an appointment as "Completed". This means that the client has arrived and is now being seen by the practitioner. This can be used as an indicator on the diary screen where in a busy waiting room you can monitor where you are up to! Clients that are Being Seen are shown in a "green" highlight on the diary (either a highlight LED next the appointment, or the client's name changes colour – depending upon your preferred diary display options). To mark an appointment as Completed, you can do one of 5 things (you choose your preferred method!). From the diary, you highlight the appointment and either: 1) double click the appointment and tick the "Completed" box in the appointment details window, 2) right-click the appointment and select "Completed" from the pop-up menu, 3) select the "Diary" option from the main PPS menu and select "Completed", 4) click on the "Completed" button on the diary screen (towards the top right of the diary), or from the Daily Appointments list you can 5) highlight the appointment and click in the "Completed" column (displayed as "Comp." to save space!). Using any of the above methods apart from option 1) will display an Appointment Completed screen which allows you to quickly deal with the charge / payment for the appointment, and allows you to optionally select to book another appointment, or schedule a reminder for the future so that you can maximise the chance of this client re-booking. The Charge / Payment section of this screen will already display the charge code if a charge code was associated the with "Appointment Type" assigned to the appointment. The charge / payment options do not need to be used here if you prefer to either use Cash Desk to manage your billing, or you prefer to do all billing at the end of the day. If you do use the charge / payment options here, then you can very quickly create the charge and mark it as paid (by selecting the payment method). Full Charge, Invoice and Payment records are created when you do this, so you are not skipping any steps by using this method. If preferred, you can just create the charge here to invoice later, or raise the invoice to pay later and so on.

Appointment – Copy
You can "copy" an appointment to the Windows™ Clipboard, then you can "paste" the appointment to a new position in the diary. This will duplicate the appointment but against the new appointment date, time, diary user, treatment room. To "copy" an appointment, firstly highlight the appointment that you wish to copy, then you can copy the appointment to the clipboard in one of the following ways: 1) use Ctrl+C on the keyboard, 2) from the PPS Menu: Edit – Copy Appointment. 3) right-click on the free appointment slot and select "Copy Appointment" from the pop-up menu.

Appointment – Cut
You can "cut" an appointment to the Windows™ Clipboard, then you can "paste" the appointment to a new position in the

diary. When you "cut" an appointment, it is placed on the Windows™ clipboard and removed from the diary. You can then "paste" the appointment to a new location. To "cut" an appointment, firstly highlight the appointment that you wish to copy, then you can copy the appointment to the clipboard in one of the following ways: 1) use Ctrl+X on the keyboard, 2) from the PPS Menu: Edit – Cut Appointment. 3) right-click on the free appointment slot and select "Cut Appointment" from the pop-up menu.

Appointment - Delete

There are several ways that you can delete an appointment from the diary. First you need to highlight the appointment in the diary by clicking on it with the mouse. Then you can do one of the following (you choose your preferred method!): 1) use the delete button on the diary toolbar, 2) right click on the appointment and select "delete" from the pop-up menu, 3) select from the PPS Menu: Diary – Delete, 4) use the F4 key on the keyboard. In addition to these options, you can also delete an appointment from the Client Log screen. Sometimes you will not need to delete an appointment, if the client is cancelling the appointment, or does not attend, you can mark the appointment as DNA instead. *See: Appointment – DNA* for more details.

Appointment - Diary User

The Diary User is the person for whom a client appointment is with. "Diary User" is used rather than "Practitioner" because any PPS system user can have a diary, not just Practitioners. To set up a system user as a Diary User, use the "Set Up System Users" option from the PPS Tools Menu. *See: Users – Setting Up* for more details

Appointment - DNA

DNA is the generic term used for appointments where the client has not attended (this includes cancellations as well as failure to attend). When an appointment is marked as DNA, you can specify a "Reason for Non-Attendance" (RFNA). Depending upon the RFNA you can automatically re-open the appointment if required. You can also associate a Charge Code with any RFNA – *See: RFNA* for more details. When you mark an appointment as DNA it is shown with a "red" highlight on the diary (either a highlight LED next the appointment, or the client's name changes colour – depending upon your preferred diary display options). To mark an appointment as DNA, you can do one of 5 things (you choose your preferred method!). From the diary, you highlight the appointment and either: 1) double click the appointment and tick the "DNA" box in the appointment details window, 2) right-click the appointment and select "DNA" from the pop-up menu, 3) select the "Diary" option from the main PPS menu and select "DNA", 4) click on the "DNA" button on the diary screen (towards the top right of the diary), or from the Daily Appointments list you can 5) highlight the appointment and click in the "DNA" column. It is important to enter the RFNA as this will determine whether or not to re-open the appointment slot, or to make a charge for the DNA. You can also use RFNA when producing diary reports and statistics as a useful breakdown of why clients fail to attend.

Appointment - Duration

The appointment duration is the length of the appointment. This is measured in minutes and is normally determined by the length of the free appointment slot into which the appointment is booked (*see: Appointments Diary – Setting up*). The duration can be changed as required when adding or modifying the appointment. You will receive a conflict warning for any appointments that "overlap" because of the duration. You can use the "Appointment Type" look up table to set the appointment duration for you – *see: Appointment Type for more details.* The minimum appointment duration is 1 minute, and the maximum is the length of the free appointment slot – *see: appointments diary – setting up*.

Appointment - Equipment

You can assign equipment to an appointment. This is entered on the appointment details screen. Equipment is a look up table and you set up the entries yourself. This can be used to indicate if special practice equipment needs to be used for an appointment. You can also breakdown your appointments reports by "equipment". *See: Equipment* for details of how to set up Equipment entries in the look up tables.

Appointment - Location

Location is the actual clinic location. This can be used when the appointments diary is used to book appointments for more than one clinic location (a satellite clinic, or another clinic as part of your group). In previous versions of PPS, location was used to indicate treatment room – now you can use treatment room as well as location. The Location is normally assigned when setting up the appointments diary. You can also select to view the diary for a selected location only if required. This is done by selecting from the Location drop list next to the date at the top of the diary screen. This drop list selection is only available when you have locations set up. You do not have to use the Location entry if you only have one practice location. For more details on setting up the location

Appointment - Modify

You can modify any of the details of an appointment if required, including the date, time duration, diary user etc. To modify an appointment, first click on the appointment to highlight it and do one of the following (you choose your preferred method!): 1) double click the appointment, 2) click the Modify button on the appointments diary toolbar, 3) right-click the appointment and select "Modify" from the pop-up menu, 4) press the F3 key on the keyboard. In addition, you can modify an appointment from the client log screen. If you need to move the appointment to another date, time or diary user, then you can use the Windows clip board to copy/cut and paste the appointment, or you can drag the appointment with the mouse to a new position on the diary screen.

Appointment - Move

To move an appointment, you can either: modify the appointment and change any of the date, time, diary user or treatment room details as appropriate, or you can "cut" and "Paste" the appointment to a new position in the diary. You can also "drag" and "drop" the appointment with the mouse to a new position on the same diary page.

Appointment - New

To add an appointment to the diary, you first need to display the diary on screen. To do this, select from the PPS Menu: Appointments – Appointments Diary. Alternatively click "Diary" on the Taskbar, Once the diary is displayed, click to highlight the free appointment slot required then do one of the following (you choose your preferred method!): 1) double click the free appointment slot, 2) click the New button on the appointments diary toolbar, 3) right-click the free appointment slot and select "New" from the pop-up menu, 4) press the F2 key on the keyboard. When the New Appointment screen appears, the date, time, duration, diary user and (if appropriate) location and treatment room are automatically entered for you, so all you need to select is the client. To do this, simply enter all or part of the client's surname and press the Enter key on the keyboard. If the appointment is with a new client, you can decide whether your appointments diary allows you to create appointments for new clients by simply typing in the client name to the appointment screen, or by having to allocate a client record first. This is done using the PPS Menu: Tools – Appointments Diary Options. You can allocate an Appointment Type to the appointment. This can be used to determine the duration of the appointment, and also can have a default charge code assigned to it, so that when the appointment is completed and the charge created, the correct charge can be easily created. *See: Appointment Type for more details*. You can enter general notes against the appointment if required. Also you can select to repeat the appointment if required – *see: Appointment – Repeat for more details.*

Appointment - New Client
If an appointment is with a new client, you can decide whether your appointments diary allows you to create appointments for new clients by simply typing in the client name to the appointment screen, or by having to allocate a client record first. Set up this option from the PPS Menu: Tools – Appointments Diary Options. If you are allocating a client record, then a small client details screen is used for you to enter the client name & contact details and when the client arrives for the appointment you can use the main client details screen to enter their remaining details. If you are simply entering the client name then when you need to access other parts of PPS (such as Accounts) by highlighting the appointment first then clicking another option (such as Create a Charge), then PPS will prompt you at that stage to either select a client from your existing list where the name is similar to the one you have typed in on the appointment, or you can create a new client record if you do not have this client in your records already.

Appointment - Notes
You can add notes against an appointment, either when you add an appointment, or when you modify an appointment. The notes entered are "free text" general notes. You can select to display any notes entered (the first 30 characters) on the actual diary alongside the client name. To select to display notes, use the option from the PPS Menu: Tools – Appointments Diary Options.

Appointment – Paste
If you have "cut" or "copied" an appointment to the Windows™ Clipboard, then you can "paste" the appointment to a new position in the diary. To do this, you must first highlight the free appointment slot in the diary, then "paste" the appointment by in one of the following ways: 1) use Ctrl+V on the keyboard, 2) from the PPS Menu: Edit – Paste Appointment. 3) right-click on the free appointment slot and select "Paste Appointment" from the pop-up menu.

Appointment – Practitioner
See: Diary User

Appointment - Print
See: Appointments Diary - Print

Appointment - Ref
The Client Ref field is an entry that you can use if you have your own system of reference numbers for your clients. The client ref is entered on the main client details screen. When you select a client for an appointment, the client ref is displayed on the appointment screen.

Appointment - Reminders
When an appointment is added, you can set up PPS to prompt you to create a reminder. The reminder will be a PPS activity record such as a telephone call, or letter and will be scheduled to take place *n* days before the appointment. The purpose of this type of reminder is to prompt you to remind the client that they have an appointment with you in *n* days time. You can set up your reminder threshold using the PPS Menu: Tools – Appointments Diary Options. You will only be prompted to set up a reminder if the appointment is more that *n* weeks in the future. You can also schedule a future reminder when an appointment is completed. This reminder will be a PPS activity record such as a telephone call, or letter and will be scheduled some time in the future. The purpose of this type of reminder is to prompt you to contact the client to remind them to make an appointment.

Appointment - Re-Open
You can select to re-open an appointment slot if the appointment that is currently in that slot is marked as DNA (did not attend). Each time you mark an appointment as DNA, you have the option to re-open the slot. You can select to automatically re-open the appointment slot depending upon which RFNA (reason for non-attendance) you select. This is set up in the RFNA look up table – *see: RFNA for more details.*

Appointment - Repeat
A repeat appointment is a series of appointments repeated at a selected interval for a selected period of time. You can also repeat Blocked Appointments. When adding or modifying an appointment, the appointment details screen has a <Repeat> button that is used to define the series of repeat appointments. This screen has a wide variety of options for repeating the appointment every day, week, month, etc. (or every "other" week and so on). You can select how often the appointment is repeated, and for how long. You can also select what to do if the repeat interval you have selected means that the appointment falls at the weekend. Once you have booked a series of repeat appointments, you are able to delete them all in one go if required simply by deleting any one of the series; this generates a prompt for you to delete the whole of the series if required.

Appointment - Room
See: Appointment – Treatment Room

Appointment - Search for Client
When adding, or modifying an appointment, you can easily assign a client to the appointment by searching for the client using their surname. On the appointment details screen, there is a "Search for Surname" prompt – enter all or part of the surname here and press "Enter" on the keyboard. This shows the standard PPS client search screen will all matches for your entry shown. For example if you have entered SMI in the surname field, then the results will show all clients whose surname starts with SMI (Smith, Smiley, Smithfield, etc.). Alternatively, you can click on the client search button, and use the regular options for the standard PPS client search screen which include searching via the clients post code, address, reference, etc. If you know the client number, you can also enter the client number directly onto the appointment details screen.

Appointment - Surname
See: Appointment – Search for Client

Appointment – Treatment Room
Treatment Room is the where the appointment will take place. This is an optional feature of the PPS Appointments diary. You can simply book an appointment with a diary user (Practitioner) if required. You can optionally set up your free appointment slots so that you know which treatment room the diary user is assigned to for each part of the week. This means that when you add the appointment, the diary user *and* treatment room are already selected on the appointment. There is also the option to display the whole diary via treatment room. If you prefer to display your diary in this way, then the diary is still set up via diary user, but each diary users' appointment slot on each day of the week is assigned to a treatment room. When you display the diary by treatment room, only the appointment slots that have been assigned to a treatment room are shown. *See: Appointments Dairy – Setting Up* for more details.

Appointment - Type
See: Appointment – Appointment Type; Appointment Type

Appointment Type
Each Appointment can have an Appointment Type assigned to it. This will typically be an entry like "Initial Assessment" or "Routine consultation". This is a Look Up Table of entries that you set up. Assigning an appointment type to each appointment is optional. Set up your list of appointment types by using the following option of the PPS Menu: Tools – Look-up Tables, then select Appointment Type from the "Appointments Diary Tables" section. This allows you to add new entries, modify or delete existing entries, or export the list

of current entries to an external file such as an Excel spreadsheet. For each Appointment Type entry in your list, you can assign a single one to be the default appointment type that is used when you add a new appointment (this simply saves you from selecting the same appointment type entry when adding the majority of appointments). You can also select a default Charge Code to be associated with the appointment type entry. This means that when a charge is created for the appointment, the charge code is entered automatically. This again is useful if the majority of your appointments are of the same type, and same charge. You can also select for each appointment type to have a default reminder period – useful if some of your appointment types are at six month intervals for example. Finally you can optionally nominate an appointment duration. This will ensure that each time you select this appointment type, the duration on the appointment will be adjusted if necessary in line with the setting for that appointment type.

Appointments Diary

The PPS Appointments Diary allows you to record your client appointments, and manage your available appointment times. There are a variety of diary view styles to suit your needs including single day, whole week, single or multiple users etc. You can access the PPS Appointments Diary from the PPS Menu: Appointments – Appointments Diary, or by pressing Ctrl-A on the Keyboard. You can also click on Appointments, or Diary on the Task Bar. The diary has a toolbar to give you access to common functions such as adding appointments, and when the diary is displayed, clicking on an item in the task bar, or selecting from the PPS menu will normally be related to the currently highlighted appointment. For example, if an appointment for Mrs Smith is highlighted, then clicking on the Accounts option on the task bar will show the accounts screen for Mrs Smith.

A Practitioner on the PPS Appointments Diary is referred to as a "Diary User". This is to allow the diary to be used by more people than just Practitioners in your practice. You can select to set up and use your diary either by Diary Users, or by Treatment Rooms – this can suit they way that you are used to booking your clients into the diary.

See below for further detailed information relating to the various Appointments Diary functions in PPS.

Appointments Diary - Adding New Appointments

See: Appointment - New

Appointments Diary - Columns

The PPS Appointments Diary is displayed in Columns. You can specify both how many columns are available, and how many are displayed on the screen at once. To change the number of columns, you can click the small plus <+> and minus <-> buttons in the bottom left corner of the diary to increase or decrease the number of columns. You can also type in the number of columns in the box in-between the plus and minus buttons. The default number of columns – which is used each time you start up PPS – can be set using the Diary View Style options. The Diary View Style options also specify whether your columns will show each day of the week, your practitioners (diary users), or Treatment Rooms. If more than one Row is used, then the columns are displayed left to right on the first row, then left to right on the second row etc. If a smaller number of columns is specified than the columns that are available to display, then small blue <Left> and <Right> buttons are used to scroll the diary left and right to access all the available columns. For example, if four columns are displayed and the diary is set to display the whole week (i.e. Monday to Thursday is displayed) for a selected diary user, the remaining columns for the rest of the week (Friday, Saturday, Sunday) can be accessed by pressing the Blue Arrow in the bottom right corner of the diary.

Appointments Diary - Options

The Appointments Diary Options give you control over how the diary works, and how information is displayed in the diary. You can access the Appointments Diary Options from the PPS Menu: Tools – Appointments Diary Options. The Options screen that is displayed has 5 tabs along the top; one tab for each category of options as follows:

General Tab – Options are: **Default Appointment duration** – this is the appointment duration used when no other duration is specified. The default value for this is 30 minutes**. Daily List Refresh Rate** – this affects the daily appointments list screen and **Diary Refresh Rate** – this affects the Appointments Diary. You only need to set a refresh rate if you are working on a networked system. Set at zero for no refresh rate. If the refresh rate is set, then the daily appointments list/diary will refresh every *n* seconds – when your screen refreshes, any changes to appointments such as new appointments, status such as arrived, completed, etc. will be automatically updated on the screen. **Day Starts and Ends** – Used to control the shaded areas of the "Diary" style diary display, also used as the start and end times for a new diary user when they are set up with a default diary. **Appointments with Non-Clients** - you can also specify if the Diary allows you to enter appointments for "non-clients". This means simply typing in a name rather than searching from your existing client list. It is better to always enter appointments for existing client records – you are able to quickly add new clients when you add new appointments. This means that the client no is assigned when the appointment is made, and the remaining details such as address and profile details can be entered when the client arrives for their appointment. **Warning for Previous Appointment with different Diary User** – you can select whether the diary warns you if you are booking a client in with a different practitioner to their last appointment.

Reminders Tab – When booking an appointment that is *n* or more weeks in the future, you can be prompted to create an appointment reminder. This is a reminder that will be scheduled for *y* days before the appointment and can be either a telephone call, letter, or e-mail. This is a way of quickly reminding your clients of their forthcoming appointment several days before hand – useful when the appointment was made weeks or months ago. The PPS approach to reminders such as these is that you create them at the time the appointment is made, then you do not have to worry about the reminder until it is due – where PPS then prompts you automatically to process/complete the reminder.

Diary Display Tab – You can change the "default" diary display – this is the display that will be used whenever you display the diary at the beginning of each day. The diary view style can be changed whilst using the diary, but this setting is the one that is remembered for the start of each day – *see: Appointments Diary – Diary View Style for more details*. You can also select which items are displayed in the diary columns for your free appointment slots. If you have several practitioners, you can select for the diary column for practitioners who are not working on a given day to be moved to the right of the diary columns display. This is very useful if you have lots of practitioners set up and several of then only work one or two days per week; on the days that they are not working, their column is moved to the right hand side of the diary display and the practitioners who are working that day are displayed in the first columns.

Appointments Display – there are various options for which details to include when displaying appointments, how to display the client name, display options for the "list" style diary, and font selections.

Utilities Tab – This is a useful option to allow you to move appointments "in bulk" from one diary user and or treatment room to another. This can be for a specified date range. If you have a practitioner that is leaving the clinic, or away on leave, then all of their appointments between the selected dates can be moved to another practitioner.

Appointments Diary - Print

You can print the appointments diary is a variety of styles. You can also print a schedule of appointments for a selected client. To print the appointments diary, use the <Print> button on the diary toolbar. This shows a screen with two "tabs" at the top: one to print the diary; and the other to print a schedule of client appointments.

When printing the Diary, there is a range of options to select what to include on the printout against each appointment. You can also select to show Activities due that day (for each diary user) at the bottom of each column – this is dependant upon the "include on diary printout" box being "ticked" against each activity record. You can select a date range to print out and also a print style which has a variety of number of columns per page in either landscape or portrait format. There is also a monthly printout which has seven columns (days) and five rows (weeks).

When printing an appointment schedule, you must first select a client – the client for the currently highlighted appointment on the diary is selected automatically but can be changed. You can select to include All Future, All Past, All appointments, or appointments between a selected date range. The printout can be printed as a report (using the <Print> or <Preview> buttons), saved to a file (such as an Excel spreadsheet) or sent as a letter or e-mail to the client.

Appointments Diary - Refresh

The appointments diary can be set to refresh automatically. This is useful in a network environment where another PC has added an appointment it will be automatically displayed on your screen when the diary refreshes. There is also a <Refresh> button on the diary toolbar that can be used if you want to refresh the diary display at any time. To set up the automatic refresh of the diary, use the PPS Menu: Tools – Appointments Diary Options screen and set the refresh rate to *n* seconds. If you do not want the diary to refresh, then set this interval to zero.

Appointments Diary - Rows

You can select how many rows are displayed in the diary. This can be useful if you want to display more diary users on the diary at the same time without making the columns too narrow. To change the number of rows displayed, use the "Select Diary View" screen, available from the appointments diary screen either by right-clicking with the mouse on the diary or selecting from the PPS Menu: Diary and selecting "Select Diary View". Note that the PPS Menu: Diary option is only shown on the menu bar when the appointments diary is displayed. For more details, *see: Appointments Diary – Diary View Style.*

Appointments Diary – Search

The Appointments Diary has a Search button on the toolbar that can either be used to Search for an Existing Client Appointment, or to Search for a Free Appointment Slot. From the PPS Appointments Diary, Click on the <Search> button on the diary Tool Bar, then select from one of the search options on the Pop-up menu: *See: Appointments Diary - Search for Existing Client Appointment; Appointments Diary Search for Free Appointment Slot* for more details.

Appointments Diary – Search for Existing Client Appointment

To search for an existing appointment with a client, from the Appointments Diary use the <Search> button on the toolbar, then select "Search for an Existing Client Appointment" from the pop-up menu. When searching for an existing client appointment, you simply enter "All" or "Part" of the client name, then select to search for Future, Past, All, or Appointments between a specific date range. Finally you can optionally select to search for a selected diary user's appointments only. Press the <Search> button and a list of appointments will be displayed that matched your criteria. You can highlight an appointment in the list and click <Select> - the appointments diary will turn to the correct page, and highlight the selected appointment.

Appointments Diary – Search for Free Appointment Slot

To search for an existing appointment with a client, from the Appointments Diary use the <Search> button on the toolbar, then select "Search for Free Appointment Slot" from the pop-up menu. There are a range of criteria you can choose to specify the appointment slot you are looking for, these include a selected day of the week, selected time of day, a selected diary user and so on. The more specific you make this, the fewer free appointments you are likely to be offered. You can use this option whilst talking to a client on the telephone to book an appointment; this could be a more efficient alternative to simply "paging" through the diary looking for free slots. When you have made your selections, click <OK> and PPS will search for all the free appointment slots that meet your criteria. If you have asked for a 60 minute appointment for example, then two consecutive free 30 minute slots will be included in the results. You can select a free appointment from the list, and click the <Make this Appointment> button – the diary will turn to the correct page, open up the "Add New Appointment" screen for the slot you have selected.

Appointments Diary - Setting Up

Setting up the appointments diary is where you set up your available appointment times. This is done for each diary user, and for each week. There are options available to repeat the same week every week, or to "copy" and "paste" weeks as required. This allows the flexibility needed to work different hours on alternate weeks etc. To set up your appointments diary, use the PPS Menu: Tools – Set Up Appointments Diaries.

This displays a "Planner" style screen showing each of your diary user's down the left hand side and weeks of the current year along the top. If the diary user you are looking for is not listed down the left hand side, then this user needs to be set up as a Diary User. To do this, select fro the PPS menu: Tools – Set up System Users, select the diary user from the list and click <Modify> then make sure that the box that says "Has an Appointments Diary" is ticked. Save your changes, and return to the Set Up Appointments Diary screen.

To set up a selected week for a selected diary user, simply click on the required week in the "planner" style grid and press the <Modify> button. This will display a new screen showing each day of the week. Your available appointments are shown as highlighted blocks or Slots in each day's column. You can set up as many slots on each day as required – for example a morning slot and an afternoon slot. A Slot is a set of one or more appointments between a start time and an end time. For example the Monday morning slot may start at 08:30 and end at 12:30 and have 30 minute appointment durations. This means that this slot will show 8 free appointments on the diary for Monday morning. Note that the end time is the end time of the last appointment not the start time of the last appointment in the slot. To add new slots on a given day, simply double click in an empty space on that day, or to modify or delete an existing slot, double click on the slot and change the details, or use the delete button.

Once you have set up any week, you can highlight this week on the planner, and use the Copy/Paste buttons to duplicate this week for either another diary user, or another week. You can also use the Repeat button to repeat this week into the future – options here include every week, every other week, etc.

For more details and a step by step guide to setting up your appointments diary, see the PPS How To Guides.

Appointments Diary - Style
See Appointments Diary – View Style

Appointments Diary – View Style
The Appointments Diary has a wide range of viewing options; this controls the number of columns/rows that are displayed, selections to display the diary in either "Diary" style or "List" style. "Diary" style shows the time of day in typical diary format down the left hand side and appointments show in blocks – their size displayed in line with the appointment duration. The "List" style diary shows a list of all your free appointment slots and appointments for each day – the free slots easily identifiable by the time of the slot (and optionally the duration).

You can also display the diary by either Diary User or Treatment Room. Your choice here will depend upon how you normally book your appointments – with Practitioners, or into Rooms. If you book your appointments into Rooms, then the diary will still need to be set up via Practitioners, as the practitioner is the starting point for appointment availability. When viewing the diary by treatment room, you can still select to show the practitioner assigned to that room in the diary column.

You can select to show either a single Practitioner or all Practitioners (vice versa for Treatment Rooms) on the diary. This combined with displaying a single day or several days (up to a week) means that you can choose any combination from a single Practitioner / single day to all Practitioners for a whole week.

Appointments Diary - Zoom
When using the "Diary" style display on the Appointments Diary rather than the "List" style display, there are two small zoom buttons towards the top right hand corner of the diary labelled plus <+> and minus <-> . These can be used to increase or decrease the size of the detail displayed in each column. Using the plus <+> button will zoom in – each appointment will appear larger but you will see less of the whole day in the column. Using the minus <-> button will zoom out – each appointment will appear smaller but you will see more of the whole day in the column.

Appointments Diary List Report
The Appointments Diary List report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Appointments Diary Reports section". This report shows you appointments for a selected diary user, or all, and for a selected date range. You can select to include accounts details on the report, and select to show DNAs and New clients. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Archive – Activities
See: Activities - Archiving

Archive – Appointments
See: Appointments - Archiving

Arrived
See: Appointment - Arrived

Association
See: Club; Company

Attachment
See: E-Mail – Attachment; Document Library; Document Attachment

Audit
PPS maintains an audit of all updates made to the database in several key areas. As further developments take place to PPS, these areas will be expanded to include database updates in *all* areas of PPS. Currently, audit details are recorded for the following areas: Appointments, Client Details, Clinical Notes, and Activities. The audit details captured will allow the PPS system administrator to make audit enquiries to see which PPS user has carried out which updates to the database, and precisely when. This audit enquiry option will be available in the near future. In the meantime, support staff at PPS are able to extract all the required information from your audit should a serious need arise.

Authorisation Code
This is a code that is required by medical insurers to authorise payment for treatment. The code is entered when creating a Charge record, and can appear on the invoice that is sent to the third-party (*see: Invoice Options*). When an authorisation code is entered on a charge record, PPS remembers the authorisation code entered for that client/Practitioner, and will automatically use the same authorisation code next time a charge is created for the same client/Practitioner. When billing a third-party, a Provider Code may also be required to appear on the invoice. *See: Insurance Provider Codes* for more details.

Auto Preview
See: Client Log – Auto Preview; Client Browse – Auto Preview

B

Background (Fadout Backgound)
Most of the screens in PPS have a light blue background which appears to "fade out" – darker at the bottom and lighter at the top. You can remove this effect using the PPS Menu: Tools – Options, select the "General" tab. The screen has the option to "Use Fadeout Backround" you can switch this one or off. If you are using PPS over a long-distance network such as a VPN, or remote access, then switching this off can improve the clarity of some screens as these types of connections do have a limited number of colours available on the screen which and therefore the fading out effect may not appear as smooth.

Backup
A Back up is a simply a copy of your data. It is very important to back up your data. PPS provides you with an option to make a back up copy of your data. The back up of your data can be used in conjunction with the "Restore" option if your data ever needs to be restore after a computer failure. It is quick and easy to make a back up copy of your data. It is your responsibility to make a back up copy regularly – at least EVERY DAY - and store this AWAY FROM YOUR COMPUTER. To run the back up option in PPS, select from the PPS Menu: Tools – Back up. This screen has options to include data from the various folders as part of your PPS database. These include the main DATA folder, your Letters folder, Charts folder, etc. You can select to back up all of these folders, or as many as you want for each back up copy. Running the Back up option produces a single file – this is a ZIP file which is a common type of "compressed" file. You can select to encrypt the file which automatically issues a password with the file, so that the data contained within the file cannot be accessed except by the PPS restore program (this password is also specific to your own PPS system). You can select to copy the back up file to an external disk or drive. You can copy the back up directly to a CD provided that you have formatted the CD correctly first. To copy to a CD, you must use your CD Writer software to format the CD in such a way that you are able to simply "drag and drop" files in windows explorer (or my computer) directly onto the CD.

Bank Holiday
See: Look Up Tables - Appointments Diary Tables – Calendar Dates

Bar Chart
See: Statistics and Summaries

Being Seen
See: Appointment - Being Seen

Block Appointment
A Block Appointment is a special type of non-client appointment that allows you to block out your time in the diary. This can be for breaks, meetings, teaching sessions, etc. A Block Appointment is added in the same way as a normal appointment. It has a date, time, duration, diary user, treatment room & location (both optional). A Block Appointment has a "non-availability reason" associated with it. This is a list of standard entries from a look up table that you set up yourself. Like with normal appointments, you can cut, copy, paste, drag & drop, add, modify, delete and repeat block appointments in exactly the same way as normal client appointments. Block appointments appear on your diary in a light brown colour (yellow on the list style diary) and show the reason for non-availability on the diary.

Body Chart
See: Chart

Booked Time
This term is used on the Summaries and Statistics reports and is defined as the total number of hours of appointments you have between the date range for the report.

Breakdown
This is a term used on all PPS Reports. When you run a report, you can select to breakdown the results into groups or categories. Most PPS reports allow you to breakdown to two levels. The breakdown category will have it's own heading and sub-totals on the report. For example, if you select to breakdown your report by Practitioner, then each practitioner will have their own heading on the report, with the report results shown for that practitioner underneath the heading. At the end of the report results for that Practitioner, there will be a sub-total line showing totals for that Practitioner. Typically an accounts/revenue report could be broken down by Month then Practitioner. This means that each Month will have its own section on the report (and its own sub-total line) and then within each month, the report will show one section per practitioner. Using a breakdown on most reports is optional.

Browse
"Browse" is the term used to view records in a list / column form, very much like a spreadsheet. PPS has a specific client browse screen that enables you to view your client records in a selection of different orders (surname, postcode etc.). In addition, several other PPS screens, such as the client search screen, use a "browse" to show you a list of records.

C

Calculate
See: Statistics and Summaries

Calendar
See: Task Bar

Calendar Dates
Calendar Dates are dates that you want to highlight in your diary. These can be Public holidays, special dates such as birthdays and wedding anniversaries can also be included. You can set up a calendar date using the PPS Menu: Tools – Look up Tables, then select Calendar dates from the Appointments Diary Tables section. For each date, you can select whether or not the date appears every year – for example a birthday will but a public holiday may not be on the same day each year. For dates that are not on the same day each year, these will need to be input each year.

Cancel
See Also: Delete; DNA; Cancel button

Cancel Button
Cancel is the term used on buttons shown on screens, pressing the button will cancel any changes to details you may have made on that screen. You are normally prompted to confirm before your changes are cancelled. You can use the "Esc" escape key on the keyboard to operate the cancel button.

Cash Desk
PPS Cash Desk is a "point-of-sale" type screen that can be used to quickly create charges, invoices and payments all in one step. You can access the Cash Desk screen directly from anywhere in PPS either from the PPS Menu: Accounts – Cash Desk, or by using the F11 key on the keyboard. When the screen displays, make sure that the client and practitioner are selected. If you launch Cash Desk by clicking on an appointment in the diary first, then these details will be shown already. The Cash Desk screen shows chargeable items (consultation fees or stock items) in the top right corner of the screen – There six "quick buttons" that show the first six items in your list. To access more items, use the <More> button. You can either click on one these buttons to select this charge item, or enter the charge code directly into the "Enter Code" field. When you have added as many charges as you want, then use the <Payment> button. The Six buttons in the top right now show your first six most common payment methods – use the <More> button to see further payment methods. Select the required payment method and confirm the payment amount. When you are done, you simply click the <Save> button, and select if you want to print and invoice/receipt. You can set up which charge code items appear in the list, and which payment methods appear in the list. To do this select from the PPS Menu: Tools – Look Up Tables, and select either the "List of Standard Charges and Stock Items" or "Payment Methods" table from the Accounts Tables section. Both of these have a "Cash Desk Order" entry that determines what order this item appears in the six quick buttons on the Cash Desk screen. You can also apply Discounts and use Vouchers on cash desk, and even use it to bill third parties, even after the client has paid a portion of the bill already.

Change
See: Cash Desk; Modify

Charge
A charge is the first step for PPS billing. You have to create a charge before you can raise an invoice – a charge is a "line item" on an invoice. Charges can be either for various types of treatment, or for stock/sundry items you may sell. PPS has a "list of standard charges" that you set up yourself giving you quick access to your charges via a code, or description. There are several ways in PPS that you can create a charge, you can also skip very quickly from creating a charge to recording a payment and PPS creates the invoice for you as you go.

You can create a charge in the following ways (which way you regularly use will depend upon the way that you prefer to use PPS): 1) from the PPS Menu: Accounts – Create a Charge; 2) from the PPS Taskbar click on Create a Charge (if you have the diary open then highlighting an appointment first will create the charge related to that appointment); 3) from the PPS Menu: Accounts – Charges List, and click the New button; 4) from the diary, highlight an appointment, right-click on the appointment and select the Client Charge option from the pop-up menu; 5) when completing a consultation record, the "consultation complete" screen allows you to create the charge; 6) when completing an appointment the "appointment complete" screen allows you to create the charge; 7) Cash

Desk can be used to create charges. The first four options above will show the Client Charge screen. This allows you to select / enter all the appropriate charge details and save the charge, or go on to create an invoice for the charge. An invoice can contain more than one charge so you do not always want to create the invoice each time.

Whenever creating a charge, you have the option to select who will be invoiced for the charge, this includes the Client, and any one of the Third-Part Contacts associated with the client. This is how to bill an insurance company directly, for example. If the client does not have a third party contact associated with them, then you can select one while creating the charge, and select to always associate this third-part with the client. This will update the third-party contact details for you on the Main Client Details screen.

Charges List Report

The Charges report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Accounts Reports section". This report is a list of the charges you have created. You can select to include just charges that have not been invoiced or have been invoiced, etc. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Charts

You can incorporate charts, diagrams and pictures into your clinical notes using PPS Custom Forms. These charts are graphical images that can be a variety of Windows graphics formats including bitmap (BMP), JPEG (JPG) and TIFF (TIF) file formats. The idea of using a chart as part of your clinical notes is that you can make annotations on the chart on screen using a variety of annotation tools and markers. This can assist in the clinical note taking process. You can either use your own charts, scanned images, x-rays, digital photographs or scanned-in diagrams, or you can use one of a range of standard body charts that are provided with PPS as standard. When using PPS Custom Forms, Charts are a specific "question type" on your form. You can incorporate more than one chart on a form if required.
If you want to simply attach a chart, diagram or picture to your clinical notes without annotating it, then this can be done using the "attach document" facility – *see: Document Library for more details*.

Charts - Annotations

A chart can be used as part of a Custom Form. The chart is Windows™ graphics file and is either a fixed chart associated with that form, or can be selected each time a new form is completed. An Annotations toolbar is positioned to the left of the form and includes several options for annotating the form. You can use the mouse (or a pen/other pointing device attached to your computer) to annotate the chart using one of the annotation tools. The annotation tools are: Marker: you can select from a list of small graphical annotation markers. Select a marker from the list then click onto the chart in the location that you want the marker to appear. You can move the marker by dragging it with the mouse if it is not in the correct position. Free Draw: this annotation marker allows you to "click and draw" with the mouse (or other pen/pointer) directly onto the chart. Line, Circle, Rectangle, Cross: allows you to click and drag to "stretch" the marker on the chart. The marker can be re-sized afterwards by clicking and dragging on the small Red Box at one corner of the marker, or moved using the small White Box at the other end of the marker. You can also add text to any marker. Once you have added, or selected an existing marker by clicking with the mouse, you can enter annotation text using the "Text" entry underneath the annotations toolbar. There are various Font options to change the foreground and background colour of the text, and to change with "pen width" of the marker. To the bottom left of the chart, there is a button that allows you to delete an annotation marker – select the marker by clicking the marker with the mouse, then use the delete button. You can also show/hide all annotations – useful if you want to see the original chart more clearly without the annotations shown.

Circle

See: Charts – Annotations

Client

Client records are the hub of your PPS database. PPS refers to these records as "Clients" rather than "Patients" because PPS is used across a variety of business and clinical disciplines, some of whom use the term "client" and others use "patient". A client record can have either minimal details entered, such as first name and surname, or can be a comprehensive range of details including full address/contact details, alternative addresses, DOB, sex, "known as", full profile details including "source of introduction", occupation (plus a range of entries you can set up yourself). In addition you can associate a variety of third-parties to clients such as doctors, insurance companies, etc. The more comprehensive the details you store for each client, the greater the opportunities to use these details in your reports and mail-merge operation. For example, by recording the "source of introduction" for each client (such as yellow pages, local advert, recommendation, etc.) you can run almost any report in PPS to show a breakdown by "source of introduction", for example "practice revenue" by "source of introduction" will show where you earn the most money from – thus where you should concentrate most on your advertising!

Client - Adding a New Client

See: Client - New

Client - Address details

The client address is available to enter, or update on the Main Client Details screen: from the PPS Menu: Client – Main Client Details, or by clicking the Client option on the PPS Taskbar. The address is divided into 3 initial address lines followed by Town, County Postcode and Country. You do not have to enter all (or any) of these address lines if you do not want or need to. The Town, County, Postcode and Country entries are kept separate to the rest of the address to enable you to search on these entries and use them as report breakdown options if required. When entering a new client address, you can enter the post code into the first line of the address – this will search on your current client database for similar postcodes and populate as much of the address for you as possible (this feature applies to UK postcodes only). This search is only carried out on your existing client records and not on a national postcode database – so the more clients you have entered, the better the return of address details.

Client - Browse

The Client Browse screen is a way of scrolling through all your client records in a spreadsheet style view. This screen allows you to select the "order" of the list, the default order is Surname. You can use the Search button on the Client Browse Toolbar, to search for a specific client record. You can also use the Open button to open the main client details screen for the currently selected client record. The Client Browse screen also includes an Auto-Preview feature, where the right hand portion of the screen is used to list full details of the currently selected client in the browse list. You can change the order of the columns in the browse by clicking and dragging the column header to a new position, you can also resize the columns by clicking and dragging the right margin of the column in the column header. Use the Save Settings button at the bottom of the screen to save your column positions/sizes.

Client - Critical Information

Critical Information is a specific entry that you can optionally make for each of your clients. This is used to warn you each time the client is selected. This special feature is designed to allow you to highlight specific information for certain clients and can be used for a variety of purposes from reminding you of special requirements for a client perhaps relating to a disability, to alerting you that the client's account is very overdue, and not to book any further appointments until their account is settled. The critical notes entry is a free text entry that you type in. Critical Information is entered onto the Main Client Details screen, and is also displayed on the client log screen. Each time you select the client (such as when adding or selecting an appointment, creating a charge, sending a letter, etc.) an Alert Box appears showing the client name, and the critical information message you have entered.

Client - Delete

You can only delete a client from the Main Client Details screen. You cannot delete a client if the client has invoices raised, or payments received on their account. When you delete a client record, all their associated records such as appointments, activities, etc. are also deleted. You should not very often need to delete a client record unless perhaps the client has been entered in error or as a duplicate to another existing client record. For clients that have been on your database for some time, perhaps try changing their client status (on the Main Client Details screen) to "Inactive" instead. The System Administrator can allow access for certain users only to have the option to delete clients, *see: Access Control* for more details.

Client - E-Mail Address

The Client E-Mail address is entered on the Main Client Details screen. The E-Mail address can be used to send e-mails to the client directly from within PPS. For details of how to send an e-mail to a client, *see: E-Mail*.

Client - Modify

You can Modify any of the details for a client from the Main Client Details screen. Select this screen from the PPS Menu: Client – Main Client Details, or click "Client" on the PPS Task bar. To modify any details, simply make the required changes to the details on screen and press the Save button. If the changes require any further database updates to be carried out (for example when you change the client's first name or surname then the rest of your client records are updated with the new name), you will automatically be prompted for these. The System Administrator can allow access for certain users only to have the option to modify client details, *see: Access Control* for more details.

Client - New

You can add a new client either from the Main Client Details screen, or from the Appointments Diary (at the point where you are adding a new appointment for a new client). To add a client record from the main client details screen, from the PPS Menu: Client – Main Client Details, then press the New button on the toolbar. This presents a blank client record, and you can enter as much or as little information as you want to – the minimum requirement would normally be the client's name. When you have added all the details about the client that you want, press the Save button. The client will then be allocated with a PPS Client Number and the client record will now be in your client database. The System Administrator can allow access for certain users only to have the option to add new client records, *see: Access Control* for more details.

Client - Notes

The Main Client Details screen includes a "Notes" section at the bottom of the screen (you may need to scroll down the screen to see this, or click on the Notes tab at the top of the screen to shortcut down to the bottom of the screen). These are general notes that can be used for any purpose. You can select to include these notes (per client) in the Client Log screen summary section – thus whenever the client log screen is displayed, then the notes you have entered are clearly in the summary section.

Client - Prime Contact Details

You can select alternative prime contact details for a client if required. This includes either using a selected "salutation" for the client (this is how you address the client in a letter: Dear *Mr Jones*, or Dear *Tom*) or selecting an alternative address to send letters and invoices to. This can be useful when dealing with clients that are minors (or elderly/infirm), and you write to their parent/guardian/carer. When you click on the "other" prime contact option on the main client details screen, then an alternative address screen is displayed to allow you to enter the correct name/address for correspondence.

Client - Print

You can print a single page record of your client details. This includes all the details that you have entered on the main client details screen, plus includes entries you have made to the medical history screen. This print can be used to periodically give to the client whilst they are waiting for their appointment in order for them to confirm or change their details on your records. To print client details, use the Main Client Details screen, select the required client and use the Print Button on the Toolbar. You can then Preview, Print or Export the details to a file such as Excel.

Client - Profile

The Client "Profile" details is a section on the Main Client Details screen which includes the client's source of introduction, occupation, and a further variety of entries that you can customise to your own requirements. To set up the remaining client profile fields select from the PPS Menu: Tools – Options. Then select the "Custom Client Fields" tab. The Profile information can be most useful for reporting purposes, as any of the profile entries are available for use as Breakdown or Criteria options on your reports. You can select (per client) to include any of the profile entries in the Client Log summary display. You can also specify whilst setting up the Custom Client Fields (Tools – Options) which entries are "ticked" by default when adding a new client record.

Client - Registration

There is no specific Client Registration option or screen within PPS – *See: the various entries under Client* for more details. Client Registration is the process of recording all required details about a client. This includes name, address and contact details, the "profile" information you want to record, any relevant third-party contacts, etc. Practices will often have a client registration form that they use already. The profile section of the PPS Client Details screen can be customised to a degree to match the details on your existing registration for if required.

Client - Status

There are several "Status" settings you can select for each client. These can be selected from the Main Client Details screen – near the top of the screen. The status settings are: Active, Inactive, Deceased, and Archive. You can use these status settings as part of the criteria selection for your reports, for example to include "Active" clients only. In addition, when preparing mail-merges (mail shots) to clients, you can select to exclude clients marked as deceased from the list of clients to send a letter/e-mail to. Clients marked as Deceased also appear in a lighter shade on the client search screen when listing the client records that match your search.

Client - Telephone Numbers

You can enter three alternative telephone numbers for each client: Home, Work and Mobile. These are either entered/updated on the Main Client Details screen, or on the smaller "add new client" screen that is used when adding an appointment for a new client. The telephone numbers are used when creating various Activity records (such as telephone calls and personal actions). This means that when you process/complete the activity record, the telephone number is conveniently displayed should you need to call the client.

Client - Third-Party Contacts
You can associate a variety of third-party contacts with each client. These contacts are stored in a separate list and are grouped into contact types such as Doctors, Insurance Companies, etc. The purpose of associating third-party contacts is that they can be used to send letters/e-mails to on behalf of the client, and also used for billing purposes. If you are sending a letter, the letter can include name/address merge fields for a third party contact type such as Doctors name/address. This means that when you send the letter, the doctor associated with the selected client will be the recipient of the letter. If the client does not have a doctor associated with them, then you can select one as you are sending the letter, and select to "always associate this doctor with this client" for future letters, etc. Each client can have an unlimited number of different types of third party contacts associated with tem. For more details about third-party contacts see: Contacts (Third-Party). When using a Third-Party contact for billing purposes, the third-party is selected at the point of creating the "Charge" record.

Client List Report
The Client List report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Client Reports section". You can select to show additional details on the report such as Addresses, Contact numbers. You can also apply a wide range of criteria to the report that enables you to use the report to build general enquiries that can perhaps be used for mail merge or marketing purposes. For example you can select to include clients who you have not seen for six months. You can use the "first occurrence" and "last occurrence" options on the report to allow you to only include clients whom you "first" saw within the date range – e.g. *clients who I saw for the first time last month*, or clients you have not seen for a while e.g. *clients who I last saw more than six months ago*. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Client Log
You can access the Client Log screen either from the PPS Menu: Client – Client Log, or by clicking Client Log on the PPS Task bar. The PPS Client Log screen is a special screen that shows a comprehensive range of information for each client. Firstly the client name, address and contact details, then a summary of the information from the Main Client Details that you have selected to show on the Client Log screen, this includes profile, contact and notes details. The lower half of the Client Log screen shows a "journal" of all records you have created for that client. You can use the "folder" structure in the bottom left of the screen to show selected categories only. For example, if you click on the "Appointments" folder, then the list will only show appointments. Some of these folders have "sub-categories" – use the small + button next to the folder to open up any sub category folders. You can access any record shown in the "Journal" list by highlighting the record and selecting Open from the toolbar, or by double-clicking on the entry in the list. You can also switch on/off, an Auto-Preview pane, which will show details of the currently selected record in the list. Certain record types can be printed from the client log, such as Invoices and clinical notes records. Highlight the record in the list and click the Print button.

Certain records in PPS such as Appointments, Accounts, and Activities use colours to indicate their status. At the bottom of the Client Log screen there are several "Status" buttons that you can select to "filter" records shown in the list, for example you can select to include/exclude records with a Purple (completed) status. The default setting is to "include" these records, click each button to "exclude" these records from the list (you will notice that the tick then has a line though it).

Clinical Notes
The Clinical Notes facility in PPS is available in the "Professional" version of PPS. This includes screens to record your Clinical Notes, manage Treatment Episodes, complete specific forms (Custom Forms) including body charts and your own questionnaires, etc. All Clinical Notes are structured into the framework of Treatment Episodes. Although some of you may be used to slightly different terminology, PPS uses "Treatment Episode" to define a specific course of treatment for a specific condition, and "Consultation" as the individual treatment sessions/consultations. Therefore each time you see a client – whether or not it is an initial consultation/assessment or a follow up treatment – this is known as a "Consultation". You can have more than one current Treatment Episode per client if required. When you select to record clinical notes, PPS checks to see if there are any current (not completed) Treatment Episodes for the client. If there is more than one, you can choose which one to record your consultation notes for. Otherwise a new Treatment Episode will be started, and this consultation will be consultation number one for the new Treatment Episode. When you complete the consultation, you can enter set up the full details of the Treatment Episode including the name, number of consultations required, diagnosis details etc. *See: Treatment Episode* for more details. For more detailed information about recording clinical notes and consultations, *see: various entries under Consultation and Custom Forms*

Clinical Notes – Printing
You can print your clinical notes either from the Client Log screen – by selecting either a Treatment Episode record or a Consultation record in the list and clicking the Print button on the toolbar, or you can print directly from the Consultation screen. When you click Print, then a Print Consultation Notes screen appears with options to print: 1) A Selected Treatment Episode – select the required episode from the list; 2) All Treatment Episodes – this is All notes you have recorded for this client; 3) Selected Consultation only – this is only available either from the consultation screen or if you first highlighted a consultation record in the client log; 4) Consultations between a date range. Once you have selected the required printout, you can click on the <Options> button towards the bottom of the screen to display further Printing Options. When you press the OK button, then your printout will be prepared. The printout is then displayed in an Internet Browser style window. From here you can choose to Print, or Print Preview the results on screen. The print Preview option has a Page Set Up option allowing you to define or change the Page Header and Footer details for the printout if required. When printed, the print includes your own name/address details (as entered in the Letterhead Set Up option of the PPS Menu: Tools) and the client's name, address and DOB.

Clinical Notes Summary
The Clinical Notes Summary is show in the bottom half of the Consultation screen. There are various Tabs along the bottom of summary to allow you to select which clinical notes records to include in the summary. These include This Treatment, All Treatments, This Consultation, All Consultations, and Summary. Use these tabs to show the required summary information. You can resize the summary section by either clicking and dragging the middle grey bar up and down with your mouse, or by clicking the Minimise, restore, maximise buttons in the top right of the summary section. This allows you to select how large the summary section is compared to the size of the entry where you type in notes for this consultation in the top half of screen. You can double click on any existing entry (consultation notes or custom form) in the summary section to call up the entry to either review further or make changes.

Club/Association
See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Code
See: Charge – Code; Diagnosis Code; Outcome Code

Columns
See: Appointments Diary - Columns

Commission
You can set up various commission rates for your practitioners, if they earn different levels of commission for different types of treatments or stock items. You List of Standard Charges and Stock Items in PPS can be grouped into different "types" – this entry is available on the Standard Charges and Stock Items Look up Table. You can set up different commission rates for each Practitioner / Type combination. The Practitioner Commission Rates is a Look up Table where you can set up your various rates. The Practitioner Commission Report then uses these commission rates against all charges that have been created to show the commission due in any given period. *See: Practitioner Commission Report for more details*.

Company
Company is the "company name" element of a Third Party contact (as opposed to contact name). Third-party Contacts are individuals or organisations that can be associated with clients, for example Insurance Companies. You are able to set up your profile of third-party contacts yourself using the option from the PPS Menu: Tools – Options, and selecting the Client Contacts tab. Each type of contact (there are 9 in total) can be referred to via contact name, and *Company* name. An example is a Law Firm, where Contact Name would be an individual lawyer or solicitor, and the *company* would be the law firm.

Complete
The term "Complete" is used in PPS for both Appointments and Consultations. You can select to Complete an Appointment – where is it marked in Purple, and you can then raise the charge, book another appointment, etc., and you can Complete a Consultation – where you can decide if the Treatment Episode is completed, or how many more consultations are required, you can raise the charge, produce a Discharge Letter etc. The term "Complete" is also used for Treatment Episodes that have an "End Date" entered – *see: Completed Episodes*.

Completed Episodes
This term is used in PPS Reports – Statistics and Summaries and refers to Treatment Episodes that have an End Date entered. When used in reporting, the "number of completed episodes in a given period" will be the number of Treatment Episodes where the "End Date" is between the selected date range.

Condition (Report Criteria)
Condition refers to the way that criteria is applied to a report using the PPS Report Wizard. Any report from the PPS Menu: Reports – PPS Reports and Mail Merge can have additional criteria applied to make your selection of records to be included in the report more specific. To do this a Field is selected, for example "Source of Introduction" and a Condition is selected. This will be from a range of predefined conditions depending upon the field selected. A common example is "Is Equal To", other conditions include: Greater than, Less than, Not equal to, Contains the text, is Blank. Conditions are normally used with a corresponding *value* to give a meaningful criteria example of: Source of Introduction *is Equal to* Yellow Pages. This example means that only clients whose source of introduction was Yellow Pages will be included on the report.

Conflict
A conflict occurs in the PPS Appointments Diary when some aspect of an appointment conflicts with another one. This is typically where the times of two appointments overlap in some way. A conflict will only occur for where the two appointments are for the same diary user or treatment room. It is possible to allow conflicting appointments to be booked – you receive a warning message informing you of the conflict first and have the option to change the date and time of one of the appointments if necessary.

Consider (Any Day Of The Week)
When searching for a free appointment, one of the options is to choose which day of the week to look for, or any day of the week. To search for free appointment slots, use the <Search> on the Appointments Diary Toolbar, and select "Search for Free Appointment Slot".

Consultation
PPS uses the term "consultation" to define each time you see a client, whether or not it is an initial session, or a follow up one. PPS has a clinical notes system that allows you to record Consultation notes each time you see a client, and these are all part of a Treatment Episode. If you see a client once, and their treatment is completed in one consultation, then the Treatment Episode will only have one consultation. If, alternatively, you see a client six times before the treatment for the presenting problem is complete, then the "one" treatment episode will have "six" consultations. To access the clinical notes system in PPS, either select from the PPS Menu: Client – Consultation, or click Consultation on the PPS Task bar. You can select an appointment, or client record first if required to give immediate access to the consultation screen for that client.

Consultation – Consultation Screen

Consultation - Date
The Consultation Date is the date of the consultation. When recording a consultation, the date defaults to today's date. To change this from the Consultation screen, click in the consultation heading that says either "Today's consultation with *practitioner name*" or "Consultation on *dd/mm/yyyy* with *practitioner name*". Clicking on this heading allows you to change the date of the consultation.

Consultation - Delete
You can only delete a consultation record if it has not been "signed off". To delete a consultation record, use the PPS Client Log screen: Highlight the consultation record you wish to delete in the client log list, and use the Delete button on the Toolbar. If a consultation has a Custom Form associated with it, you can optionally delete the custom form(s) as well. If you choose not to delete the custom form then the consultation record is not deleted as it is required as a "holder" for the custom form, but the notes you have entered for the consultation are removed instead.

Consultation - Important Information
When recording your consultation notes, you can mark specific information as "Important". To do this, either: highlight the important text then right click – This will add the highlighted text to the Important Information for this consultation, or simply right click, then select "Important Information". This will show an "important information text box and allow you to enter the text here. Once you have added "important information", a green cross is shown to the right of the middle bar on the consultation screen, and an entry is added to the "Important" section in the top right corner of the consultation screen. Important details can be reviewed and marked as "No Longer Important" at any time by clicking in the "Important" section in the top right corner of the consultation screen and selecting the required entry from the list. Then you can either review the details or mark as "No Longer Important".

Consultation - Modify
If you are modifying today's consultation record, you can simply click on Consultation on the PPS Task Bar, or select from the PPS Menu: Client – Consultation. To modify a consultation record from an earlier date, select the consultation entry in the Client log screen then either double-click the entry, or click the Open button on the toolbar. To

select an existing consultation record from the client log, first open the client log screen from the PPS Menu: Client – Client Log, or click on Client Log on the PPS Task Bar. Then select the required client – use the search button. Then find the required consultation entry in the client log list in the bottom half of the client log screen. You can only make changes to an existing consultation record if the consultation record has not been signed off. Make any changes required to the consultation notes, then press the Save button on the consultation screen to save your changes.

Consultation - New
A new consultation record can be made by either clicking on Consultation on the PPS Task Bar, or selecting from the PPS Menu: Client – Consultation. If you are using the Appointments Diary, then you can highlight an appointment first. This will ensure that the correct client record is selected to record the consultation for. If the selected client has more than one current Treatment Episode, then a small Treatment Episode Selection screen appears first in order for you to select the correct one. If you need to start a New Treatment Episode, then you can select the New Treatment Episode button from the consultation screen. You will see all your previous consultation notes, including all custom forms you have entered, in the bottom half of the consultation screen. You can use the Tabs along the very bottom of the screen to select which previous notes to review.

Consultation - Notes Fields
The consultation screen has six notes fields. You can select your won headings for the first five of these. To select your own headings select from the PPS Menu: Tools – Options, then select the "Clinical Notes" tab. The standard headings used when PPS is supplied are: Problem, Examination, Assessment, Treatment & Plan. You can change these to suit your own requirements. For example the Subjective, Objective, Assessment, Plan method of note taking is fairly common, so you could use these heading instead.

The notes fields all display as a single line of text (except General Notes which uses up the remaining space available in the notes section). Each of the notes sections will increase in size as more than one line of text is entered. If you press the Enter key while entering your notes, then you will move to the next notes field. If you want to "force" a "carriage return" or "enter key" into the notes then use Ctrl+M on the keyboard – this enables the use of carriage returns in the text and allows you to add further carriage returns if required using the enter key. Try to use as few carriage returns as possible in your notes, as the more you have, the longer the consultation summary display will be and you will have to scroll up and down the summary section more to read your previous notes.

Consultation - Practitioner
This is the practitioner who carried out the consultation. By default this will either be the current system user, or will be taken from the appointment if the consultation record is started by highlighting an appointment first. The practitioner is displayed in the White section near the top of the consultation screen alongside the date. TO change the practitioner if required, click on the current entry displayed in the white section, then this section changes to allow you to select the required practitioner from a drop down list.

Consultation - Preview
See: Consultation – Print.

Consultation - Print
You can Print your notes for an individual consultation, or for a range of consultations. The printout will include any Custom Forms that you have completed for the consultation. Consultations and entire Treatment Episodes can either be printed from the Consultation screen – using the Print button, of from the Client Log screen, by highlighting either a Treatment Episode record or a Consultation record and clicking the Print button on the Client Log toolbar. For more details *see: Clinical Notes – Printing*.

Consultation - Public/Private
You can select to make your consultation notes Private or Public. If you mark them as Private, the yourself (and the PPS System Administrator) are the only users who will be able to see the notes you have entered. Once you have made the notes private, you can make them public again if required. To make your consultation notes private, use the button along the middle of the consultation screen marked <Public> - this prompt changes to Private if the notes are made Private. You can also make Custom Forms private. Once marked as Private, the notes are also hidden from view in the summary section, although the consultation entry is listed in the summary section.

Consultation - Sign Off
You can Sign Off consultation notes. This means that no further changes can be made to the notes (not even by yourself or the System Administrator). Also notes that are signed off cannot be deleted. You can also sign off Custom Forms. To sign off a consultation record, use the button along the middle of the consultation screen marked Sign Off – this prompt changes to Signed Off and appears in Red if the notes have already been signed off. When notes are signed off – a background check is performed where a special algorithm is calculated and an audit is recorded to prevent the notes being tampered with by "hacking" into the database behind the scenes. PPS will inform you if notes have been tampered with.

Consultation - Summary
See: Clinical Notes Summary

Consultation - Update
See: Consultation - Modify

Consultation Statistics Report
The Consultation Statistics report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Clinical Notes Reports section". This report shows simple statistics based upon the consultations you have recorded including number of consultations, number remaining, etc. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Contact Note
See: Activities

Contacts (Third-Party)
Third-Party Contacts in PPS are all the individuals, or organisations you deal with that are not directly "clients". These include Doctors (GPs), Hospital Consultants, Clubs, Insurance companies, etc. PPS allows to record details for third-parties because these can be used for billing or correspondence purposes. Third-Party Contact records can be accessed from the PPS Menu: Contacts, then select the type of third-party contact list from Doctor, Insurance, Club, etc. Third-party contact records are normally associated with a client record. There is a section of the Main Client Details screen that allows you to enter these details as appropriate. Once you have entered any third-party details against a client, then this third-party can be used whenever you create charges for that client, or you need to write to the third-party on behalf of the client.

Conversion
See: Data Conversion

Copy
When entering text into any field, you can highlight the text and use the standard Windows™ "Copy" option to place the

text on the Windows clipboard. You can then paste the text back into any similar field. *See also: Appointment – Copy*

Country

Country is one of the Address fields on the main client details screen, and on the third-party contact details screen. If you normally deal with clients all in the same country, you do not need to enter these details. You can select Country as a breakdown, or criteria for most PPS reports, for example a breakdown of your practice revenue by Country.

County

County is one of the Address fields on the main client details screen, and on the third-party contact details screen. You can decide if you wish to enter this information when entering a client, or contact address. You can select County as a breakdown, or criteria for most PPS reports, for example a breakdown of your practice revenue by County.

Create

See: Add; Charge – Create

Criteria

See: Report Wizard - Criteria

Current Episodes

Treatment Episodes are part of the PPS clinical notes system. A Current Episode is defined as one which has started, but is not yet complete. PPS uses the term "Current Episodes" in statistics and reporting. When you apply a date range to a report, "Current Episodes" will be "all treatment episodes where the start date is before the "to" date in your date range, and the end date is either blank or after the "from" date. In other words, all treatments that were in progress during your date range.

Custom Client Fields

See: Client – Profile

Custom Form

A Custom Form is part of the PPS Clinical Notes system. When you record a consultation record, you can also record one or more Custom Forms as part of that consultation. The term "Custom Form" is a very general term because there is a very wide range of uses for Custom Forms. They can be used for specific assessments, such as a "biomechanics" assessment, also for special questionnaires you may use as part of your consultation, or to record the results of specific examinations you carry out. A Custom Form can include as few or many questions/entries as you want, including using Charts for annotation purposes. There are a variety of question "types" available including Dates, Numeric, Text, Multiple Choice, etc. For more details about Custom Forms, *see: various entries under Custom Form*.

Custom Form - Charts

See: Charts

Custom Form - Completing a Custom Form

You can complete a Custom Form as part of recording a Consultation record. You can have a range of forms available to suit your clinical note taking requirements. PPS is supplied with a small range of example forms, and you can create your own to suit your requirements (*see: Custom Form – Maintenance*). To complete a Custom Form, you must first start a new Consultation record. This is done either from the PPS Menu: Client – Consultation, or by clicking Consultation on the PPS Task Bar. From the consultation screen, there is a Custom Form button in the top half of the screen above the consultation notes entries. Click here and select the required Custom Form by double-clicking on the list. You control which forms are on this list – *see: Custom Form – Maintenance*. You can access a form you have already completed by double-clicking on any of the custom form entries in the summary section in the bottom half of the consultation screen.

Custom Form - Delete

You can either delete an entire form (from your list of available forms) or you can delete a single instance of that form that you have completed as part of your clinical note taking during a consultation. You can NOT delete a form from your list of available forms if any instances of that form have been completed as part of your consultation notes that has been signed off. To delete a single instance of a form (i.e. a form you have completed for a client during a consultation), you simply double-click the form entry in the summary section in the bottom half of the consultation screen to bring up the form (as if you were modifying the form), then use the delete button (red X). You can only delete this instance of the form provided that the form has not been signed off.

Custom Form - Maintenance

Custom Form Maintenance is where you set up and make changes to any of your Custom Forms. To access Custom Form Maintenance, select from the PPS Menu: Tools – Custom Form Maintenance. Here your forms are filed in folders by their "category". This screen also allows you to set up your standard "questions" that are used on your forms (any question can be used on one or more forms). It is normally worth spending some time designing your form correctly before you start using the form to record with your consultation notes. In addition, is can be worth deciding on and setting up your list of questions first also before designing and creating forms. *There is a section in the PPS Essential Guides that describes in detail how to set up your questions and forms*.

Custom Form - Manager

The Custom Form Manager screen allows you to Load forms that have been sent to you from another PPS system, register forms that are not registered (i.e. have a record limit), and delete forms. To access the Custom Form Manager select from the PPS Menu: Tools – Custom Form Maintenance. Here your forms are filed in folders by their "category". This screen also shows you which of your forms are "registered". Forms you design yourself are automatically registered whereas forms that you have loaded, or not designed yourself may not be – *see: Custom Form – Registration* for more details.

Custom Form - Modify

You can either modify the layout of a form (from your list of available forms) or you can modify a single instance of that form that you have completed as part of your clinical note taking during a consultation. You can NOT modify a form from your list of available forms if any instances of that form have been completed as part of your consultation notes that has been signed off. To modify a single instance of a form (i.e. to change the entries you have made to a form you have completed for a client during a consultation), you simply double-click the form entry in the summary section in the bottom half of the consultation screen to bring up the form, then make any changes as appropriate. You can only make changes to your entries provided that the form has not been signed off.

Custom Form - New

You can either create a brand new form (as part of your list of available forms), or complete a single instance of one of your forms as part of your clinical note taking during a consultation. To create a brand new form, select from the PPS Menu: Tools – Custom Form Maintenance, and select the New button. You can only complete a single instance of a form as part of recording a consultation record. . From the consultation screen, there is a Custom Form button in the top half of the screen above the consultation notes entries. Click here and select the required Custom Form by double-clicking on the list. You control which forms are on this list – *see: Custom Form – Maintenance*. This shows a blank copy of the form for you to complete. Once you have completed the form, use the Save button to return to the consultation screen.

Custom Form - Print
You can print a custom form either while you are completing the form (it must, however be saved first), or by returning to the form from the consultation summary section of the consultation screen, and clicking the print button on the form. Forms can also be printed while printing consultation notes, or notes for a selection of, or all consultations for a treatment episode. If printing a form as part of either a consultation, or treatment episode printout, this can be done either from the consultation screen – Print button, or from the Client Log screen – highlight a consultation or treatment episode record and click the Print button on the client log toolbar.

Custom Form - Public/Private
When completing an instance of a Custom Form, you can mark the form as Private (the normal setting is Public). This means that you and the PPS System Administrator (if this is not you) are the only PPS users who will be able to access the form, and see the form details in the consultation summary on the consultation screen. You can set the form to be "public" again later if required.

Custom Form - Registration
The Custom Forms option in PPS is part of the PPS Clinical Notes system. Your PPS Registration file will determine if you are allowed to create and use custom forms. If you are not able to create and use custom forms, then this option can be purchased as an addition to PPS. Alternatively, individual pre-designed custom forms can be registered. To register an individual form, select from the PPS Menu: Tools – Custom Forms Manager, select the required for from the list and use the <Form Registration> option. This displays a screen that allows you to enter the Form Registration Key. Contact your PPS supplier for details of how to purchase an individual registration key. If you already have the registration key, then enter it here and press Save. The form will now be registered and can be used as part of your clinical notes.

Custom Form - Sign Off
When completing an instance of a Custom Form, you can Sign Off the form. This means that no further changes can be made to the form, and the form cannot be deleted. No "instances" of a form, nor the form itself can be deleted if any single instance is signed off. You also cannot "undo" signing off a form.

Custom Forms
See: Custom Form

Cut
When entering text into any field, you can highlight the text and use the standard Windows™ "Cut" option to place the text on the Windows clipboard. You can then paste the text back into any similar field. *See also: Appointment – Cut*

D

Daily Appointments List
The Daily Appointments List is a useful way of viewing all of today's appointments (or appointments for a selected day) in a simple list. The list includes all of the basic appointment details (date, time, duration, client, etc.) as well as an indication of the appointment status (arrived, being seen, completed, DNA). In addition, you can also see if the appointment has been billed, and if clinical notes have been recorded. The Daily appointments list is accessed either from the PPS Menu: Appointments – Daily Appointments List, or by clicking Daily List on the PPS Task Bar. To change the date of the appointments displayed in the list, select a date from the calendar on the PPS Task Bar. You can also show the list for a selected practitioner only by selecting the required practitioner from the drop list in the top right corner of the screen. In addition to displaying appointments, the daily list will also show clinical notes records and billing details where these have been created and are not related to an appointment. The Daily List can be set to refresh automatically. This is useful when you are operating PPS on a network of more than one computer and another PPS use may be making updates to today's details. To set the refresh interval, select from the PPS Menu: Tools – Appointments Diary Options, and set the Daily List Refresh Rate (leave the rate at zero for no refresh).

Data
Data is a general term that refers to all your records. In computer terms, data is any piece of information that you can change, so this includes your normal records (client records, billing, appointments, etc.) and other information such as letter layouts, invoice templates and so on. PPS allows you to "back up" your data, which means to make a second copy of all your data. *See: Back Up; Database for more details*.

Data Conversion
PPS version 4 has a data conversion option to convert your data from PPS version 3.2. This option is installed as an option on the Windows Start menu (but not on the desktop). The data conversion option allows you to copy over your PPS version 3.2 records into PPS version 4. This is something you will need to do if you are currently using PPS version 3.2 and want to upgrade to version 4. Because PPS version 4 has a "demo" or "training" database, (*see: Demonstration Database*)you may want to use version 4 in "trial" mode for a while whilst still using version 3.2 until you are fully rehearsed and ready to convert your records from version 3.2. Once you have converted your records, it is recommended that you keep version 3.2 on your computer but do not make any further updates to it, because from now on you will be using version 4.

Database
The PPS Database can be stored in a separate location on your computer/network from the main PPS application files. This would apply to a PPS installation on a network where the PPS Application files are installed onto each computer, and the database is located centrally on the network. There is the option to change the database location as part of the initial installation of PPS, and there is also a separate "database only" installation available if the database is to be installed onto a computer such as a server where PPS will not be used on that computer – servers often reside in a "back office" and are not used as a desktop computer.

Database Maintenance
PPS has an option on the Tools menu for database maintenance. This includes a Re-index All Data Files option and an Appointments Archive option. The Re-Index option reorganises your data files to ensure optimum speed of access to your records during normal PPS use. This option also identifies and fixes a range of minor database corruptions that are sometimes caused by computer failures, power cuts, etc. The Appointments Archive option allows you to archive your older appointments diary records. Once you have archived your diary, then the archived appointments can be accessed both through the PPS Client Log for each client, and using an Archived Appointments List option of the PPS Menu: Appointments. Your appointments diary does not show archived appointments, so you would normally only archive appointments old enough for you not to need to refer to them at all in the diary, for example appointments more than one year old.

Database Synchronisation
See: PPS Sync

Date Selection
Nearly all "date" type fields in PPS allow you to select from a drop-down calendar. This is done using the small down-arrow button to the right of the date field. You can also double-click an empty date field to enter today's date. Date Selection is used as part of PPS Reports and Statistics to define a period

for which to produce your report. This is done using a "From" date and a "To" date – these dates are "inclusive". The date range for your report will define the scope of records that are included in the report.

Day Of Week
Day of week is a report breakdown option. When you select to break down your report results by day of week, then the report will show details and a sub-total for each day of the week. The days of the week are shown as the day names (Monday, Tuesday, etc.) and will appear alphabetically (Friday first, Wednesday last) on the report.

Defer
See: Activities - Postpone

Delete
Delete is the term used to remove any record or file in PPS. Most "data entry" type screens will include a Delete button on the toolbar. You can use this button to delete the currently displayed record. There are various restrictions placed on deleting records in certain parts of the system. For example you cannot delete a client record if accounts records exist for that client. The System Administrator can also decide which PPS Users are allowed to delete which type of records. This is set up as part of the User Profile for each user – *see: Access Control* for more details.

Demonstration Database
PPS has a demonstration database that you can use to practice using the system without affecting any "live" records. There is a limit of 50 records in each part of PPS that can be added to the database. If you reach this limit, then you will need to delete some records and use the PPS Menu: Tools – Database Maintenance – Re-index all Data Files option to clear the database down. There is also the option to reset the demo database back to its original state (i.e. with just a few example records set up). Contact your PPS supplier for more details of how to do this.

Detail/Summary
See: Report Output

Details
This is a generic term used to describe the information stored in any particular part of PPS. For example Main Client Details is the information you enter to this screen. In addition, there are several "notes" type fields that allow you to enter further "free text" details against a record – these are also sometimes referred to as Details.

Diagnosis
When starting a new Treatment Episode as part of your clinical notes records, you can enter Diagnosis details. This can be useful for reporting purposes to help analyse the type of problems you are treating. There is a "Diagnosis Codes" table where you can set up your standard list of Diagnosis entries. To set up this table, select from the PPS Menu: Tools – Look Up Tables, and select the Diagnosis table from the Clinical Notes section. To make a Diagnosis entry as part of your clinical notes, from the PPS Consultation screen either use the <Update> button towards the top of the screen – this updates the Treatment Episode details for this consultation, or when completing the consultation enter the diagnosis details in the Treatment Episode details screen (can be accessed using the <More> button in section 1) of the Consultation Complete screen. The Diagnosis can be selected as a Breakdown option on many reports – especially clinical notes type reports.

Diagrams
See: Charts

Diary
See: Appointments Diary

Diary Event
A Diary Event is a special type of appointment that allows you to book several "attendees" or Clients. This could be a group session you are running or a teaching session perhaps. An Event appears as a normal appointment in the diary. To add a diary event from the Appointments Diary, use the <Event> button on the Diary Toolbar. When adding an event to the diary, you enter or select the normal range of information like an appointment such as date, time, duration, diary user, etc. but in addition, you can set up the "attendee" section which allows you to specify the maximum and minimum attendees, and to select to add attendees to the event. These can be from your client records, or just a name that you type in.

Diary Statistics Report
The Diary Statistics report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Appointments Diary Reports section". This report shows statistics based upon your appointments diary including your occupancy levels, number of DNAs, etc. The report is broken down by practitioner (diary user). As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file.

Diary User
A Diary User is the term used on the PPS Appointments Diary for the person for whom the diary is for. This will normally simply be the Practitioner. PPS does not use the term Practitioner on the diary because you are able to have a diary for any PPS user, and these may not always be practitioners.

Digital Photographs
See: Charts; Document Library

Discharge Status
When completing a Treatment Episode as part of your clinical notes records, you can enter Discharge Status details. This can be useful for reporting purposes to help analyse the type of problems you are treating and their outcome. The Discharge Status will normally be an entry such as: "Treatment Completed", or "Referred on for alternative treatment". There is a "Discharge Status" table where you can set up your standard list of Discharge entries. To set up this table, select from the PPS Menu: Tools – Look Up Tables, and select the Discharge Status table from the Clinical Notes section. To make an Discharge entry as part of your clinical notes, from the PPS Consultation screen either use the <Update> button towards the top of the screen – this updates the Treatment Episode details for this consultation, or when completing the consultation enter the Discharge Status details in the Treatment Episode details screen (can be accessed using the <More> button in section 1) of the Consultation Complete screen. The Discharge Status can be selected as a Breakdown option on many reports – especially clinical notes type reports.

DNA
PPS uses the acronym DNA (did not attend) as a generic term for all appointments where the client did not attend. Some of you may only be used to using the term DNA for certain types of "failures to attend" but PPS uses DNA for all types. You can mark an appointment as DNA on the diary. This then allows several further options: You can allocate a Reason for Non-attendance, create a charge for the non-attendance, and select to Re-Open the appointment slot. For more details, *see: Appointment – DNA*.

Doctors
See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Document Attachment
A Document Attachment is any Windows™ document that you want to attach to your client records. You can attach a

document to your clinical notes Consultation record. You can also attach a document simply to a client record. Both of these will appear in the Client Log screen under the Documents folder in the bottom left of the screen. For more details on attaching documents, *see: Document Library*.

Document Library

The PPS Document Library is a way of attaching any external Windows™ document to your client records. You can attach documents either to your consultation records, or directly to the client. All attached documents appear in the PPS Client Log screen. Documents you have attached as part of your clinical notes records also appear in the consultation summary section of the consultation screen. To attach a document as part of your clinical notes, from the Consultation screen you can use the <Attach Document> button near the top of the screen. When you attach a document as part of your consultation record, the document still appears as its own entry in the client log screen but can be accessed either via the paperclip icon that appears in the consultation summary next to the consultation, or from the "Documents and Letters" selection in the top right corner of the consultation screen. To attach a document just to a client and not a consultation record, you can either use the Attach Document option of the PPS Menu: Activities, or select Attach Document from the PPS Task Bar. To access a document that you have already attached, select the document record from the client log screen and select <Open> from the client log toolbar. Once you have opened the existing document record, you can delete it from there.

The Document Library screen allows you to select the "source" file that you want to attach. It is highly recommended that this file is saved into the "Documents" folder contained within your main PPS Database folder. This means that any user on your network will be able to access the document irrespective of which computer on the network they are on. The Documents folder is contained within either the "Livedata" or "Demodata" folders in the main "PPS-Database" folder. You can confirm or select the client for whom you want to attach the document, enter a heading and any further notes required, and you can preview the document in a separate window.

E

E-Mail

E-Mails in PPS are part of the PPS Activities system. You can send E-Mails directly from within PPS. This is dependant upon your computer being configured to use Microsoft® Outlook or Outlook Express to send e-mails. To send an e-mail, either select from the PPS Menu: Activities – Send an E-Mail, or click on Send an E-Mail on the PPS Task Bar. You can also select the <New> button from the Activities List. The Send an E-Mail screen allows you to select either a client (the client you are currently working with is automatically selected) or a third party. You can type in the subject and body of the e-mail message, and you can attach a document to the e-mail. Like all PPS Activity records, the e-mail can be scheduled to send later if required by setting the due date/time.

See also: Client – E-Mail Address

Equipment

This is one of the PPS Look up Tables used on the appointments diary. You can assign equipment to an appointment. This is entered on the appointment details screen. Equipment is a look up table and you set up the entries yourself. This can be used to indicate if special practice equipment needs to be used for an appointment. To set up your standard list of equipment items by select from the PPS Menu: Tools – Look up Tables, and select Equipment from the Appointments Diary Tables section. You do not have to use the Equipment entry when booking appointments if you do not need to.

Error Messages

Error messages will appear on the screen if an error occurs whilst using PPS. This error could be for a wide variety of reasons. Most errors are controlled by PPS by recording the details in an error log file. Some errors however are caused by Windows™ rather than PPS. If you are returned to the PPS Log In screen, then PPS has been able to record the error details in the log file. The log file is located in the main PPS application folder on your computer (Normally called PPSv4.0). The file is called "error.log" This file can be sent to support@rushcliff.com where the PPS support team assess all errors that are reported and organise any corrections needed to the PPS program that can be included in a new release of the program. This process ensures that any errors can be quickly identified and quickly addressed. PPS Users that have a support contract receive the benefit of being able to download each new release to PPS free of charge.Event (Diary)

See: Diary Event

Event ID

PPS uses a unique identifier called and Event ID to link together appointments, charges and consultation records. You will sometimes have to select which other record to associate the record you are adding with. For example, if you are creating a charge record and the client for whom you are creating the charge has two appointments on that day, you will have to choose which of the two appointments the charge is related to. This central Event ID system is largely invisible during normal PPS use and is mainly used to centralise PPS reports that include details of when clients were "seen" or "last seen" etc.

Expenditure

See: Practice Expenditure report; PPS Expense

Expenses

See: Practice Expenditure report; PPS Expense

F

Favourites

PPS offers a wide variety of reports for which you can select a broad range of selections, criteria and breakdown options. You have the option of adding any report, including your selections, criteria and breakdown options to a list of Favourites. To access your favourite reports, these are displayed alongside all other PPS reports and are accessed from the PPS Menu: Reports – PPS Reports & Mail Merge. This screen has a "favourites" section in the bottom right corner. To add a report to your favourites list, simply select any report from any section, and select the <Open> button for that section. The PPS Report Wizard screen appears allowing you to make your selections for the report – this screen has an <Add to Favourites> button (if you open one of your current favourite reports, the button prompt is <Update Favourites>). When you add a report to your favourites, you can add a Title and Description that will appear on the main PPS Reports menu screen. All your selections for the report are saved so that each time you run the report you do not have to make all your selections again.

Favourites - Edit
You can change the Title and Help Text (Description) and menu order of your favourite reports. Select from the PPS Menu: Reports – PPS Reports & Mail Merge. The favourites section is in the bottom right corner of this screen. Select the <Edit> button to update the details. To update the actual report selections, criteria and breakdown options, select the <Open> button and make any changes in the PPS Report Wizard screen, the click the <Update Favourites> button.

Favourites - Help Text
This is the description of a report that you have added to your report favourites. The description appears in the bottom of the reports menu screen when you select the report from the list and can be used as your description of what the report is used for or a description of the settings you have made for this report (PPS Menu: Reports – PPS Reports & Mail Merge). The help text can be changed using the <Edit> button – *see: Favourites – Edit for more details*.

Favourites - Name
This is the Title of a report that you have added to your report favourites. The name can be changed using the <Edit> button – *see: Favourites – Edit for more details*.

Favourites - Order
This is the order in which your favourite report appears on the reports menu (PPS Menu: Reports – PPS Reports & Mail Merge). The order can be changed using the <Edit> button – *see: Favourites – Edit for more details*.

Field (Report Criteria)
See: Reports - Criteria

Find
See: Search

First Name
See: Client – First Name

Flags
See: Client – Critical Information; Clinical Notes – Important

Forename
See: Client – First Name

Form
See: Custom Form

Free Appointment
A free appointment is an appointment slot that is not yet taken. You can search for free appointment slots from the diary by using the "Search" button on the diary toolbar. Free slots are shown on the diary in different ways depending upon the diary view style: the "Diary" style view shows free appointments as light blue boxes alongside the corresponding time of the day; the "List" style view shows free slots as a vacant time of day and the duration optionally shown against each one. You can double-click a free slot to add a new appointment.

Free Draw
See: Charts - Annotating

Free Slot
See: Free Appointment

G

General Notes
General Notes are recorded as part of your consultation record. The Consultation screen allows up to six notes entries to be made – the headings for the first five of these can be chosen to suit your own style of note taking, and the final notes field is referred to as "General Notes". *See: Consultation – Notes for more details*.

General Notes Dictionary
PPS has two Notes Dictionaries for you to use as part of your clinical note taking: General Notes Dictionary and Treatment Notes Dictionary. These are lists of words, phrases or paragraphs of standard text that can be inserted into your consultation notes entries. You can use the General or Treatment notes dictionary from the Consultation screen notes fields. To access the dictionary from any of the six consultation notes fields, click the Right mouse button and Notes Dictionary from the list. This then shows the dictionary on the screen. You can switch between General Notes entries and Treatment Notes entries using the radio buttons along the top of the screen. The two lists are separate purely for you convenience, you only need to use one of the lists if you want. Add the entries to your notes by either double-clicking or right clicking.

GP
See: Contacts – Doctors; Client – Third-Party Contacts

Grid
See: Client – Browse

H

Health Authorities
See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Hide
See: Charts - Annotations

History
See: Medical History

Holding List
The PPS Appointments Diary has a holding list that you can use. This is a way of recording those clients who are waiting for an appointment, or cancellation. You can access the holding list from the Appointments Diary using the <Holding> button on the diary toolbar. You can add clients to the holding list, and describe what they are holding for. You can also indicate if they are holding for a specific diary user. If you have clients on the holding list, then the number of clients on the holding list is displayed in a small yell box along the top of the diary screen. You can double click on the yellow box, or click the <Holding> button to show the holding list. You can also drag and drop appointments from the holding list onto the appointments diary – to do this, highlight the free appointment on the diary first then drag and drop the appointment from the holding list onto the diary.

I

Images
See: Charts; Document Library

Important
You can flag information as "important" while recording your clinical notes. For more details *see: Consultation – Important information*.

Include
This is a term used in the PPS Reports Wizard – on step 3 of the selections for your report. On most reports you can select to "include" a selection of details on the printed report. You can un-tick any items that you do not want to include. The "Include" options only apply when the report is printed or previewed – if you are exporting the report to a file or mail merge, then the "include" options do not apply.

Installation
This is the process by which you put PPS onto your computer. You can install PPS either from an installation CD, or from a single installation file that you have downloaded from the PPS web site. If you are running a network system and are accessing PPS from more than one computer, you need to *Install* PPS onto each computer.

Insurance Company
See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Insurance Provider Codes
When you bill insurance companies directly, most insurance companies give you a "provider code" that must be quoted on the invoice. This can be particular to a single practitioner, or to your practice. PPS allows you to set up insurance provider codes. These are done by selecting from the PPS Menu: Tools – Look Up Tables, and selecting "Insurance Provider Codes" from the "Accounts tables" section. You can add a provider code entry per practitioner/insurance company combination. If you have been allocated a practice-wide provider code from an insurance company, then add the same provider code for each of your practitioners for that insurance company. The insurance company must be set up first in your list of third-party contacts. To ensure that the provider code is included on the printed invoice, select from the PPS Menu: Tools – Invoice Options and select "insurance Company Invoices" from the list, then make sure that "Provider Code" is selected.

Internet
PPS does not link directly to the internet. It is possible to download new PPS updates from the PPS web site but this is done outside of PPS. To download updates to the PPS program, you will need a PPS support contract. This allows you to access the support pages on the PPS web site where you can download PPS updates.

Invoice
An Invoice in PPS is an official bill that can be issued for payment by a client. In accounting terms an "Invoice" and "Receipt" is the same thing – a receipt is a printed copy of a "paid" invoice. The invoice has an invoice number and a date for tax purposes. PPS keeps a "ledger" of all invoices, and allows you to print an aged debtors report. An Invoice is formed from individual "line items" which in PPS are called Charges, so an invoice can only be raised after charges have been created. An invoice is "paid off" by recording a Payment and allocating the payment to the invoice. PPS is very flexible in terms of allowing either one charge, or an unlimited number of charges to appear on the invoice; also to allow either one payment to pay off one invoice, or one payment to pay off more than one invoice, or several payments to pay off one invoice. There are several ways to raise an invoice in PPS, some of these are fairly transparent in term of creating the charge, raising the invoice and recording the payment all in one step. Whichever method is used, PPS will always create proper Charge, Invoice and Payment records.

Invoice - Create
See: Invoice - Raise

Invoice - Delete
If you delete an invoice, the invoice number cannot be re-used. It will remain in your list of invoices and marked as "Deleted". This is an accounting requirement. When you delete an invoice, you have the option to either "Remove" or "Delete" the charges that were included on the invoice – if you remove the charges then they revert to being non-invoiced charges and can be included on another invoice. You also have the option, if the invoice is part or fully paid, to "Remove" or "Delete" the payment from the invoice – if you remove the payment then the payment reverts to being un-allocated and can be used to pay off another invoice. You can delete an invoice from several places in PPS: 1) From the PPS Menu: Account – Accounts, select an account (client/third-party) and highlight an existing invoice in the list, then click <Delete> on the accounts toolbar. 2) From the Client Log screen, select the correct client record, highlight an invoice from the list in the bottom half of the screen and click <Delete> on the client log toolbar. 3) From the PPS Menu: Accounts – Invoices / Receipts list, select an invoice from the list and click <Delete>.

Invoice - Layout
This is the template that is used to print the invoice. You can set up a variety of invoice templates for different purposes – or typically for different invoice types such as client, insurance companies, clubs, etc. PPS is supplied with a "Standard invoice layout" that cannot be changed; however you can make copies of the standard invoice layout and change it to your own requirements. You will need to be careful of the type of changes that you make to the layout, as incorrect changes to the layout can cause the invoice print to fail. In this case you may have to revert back to the original layout and try making your changes again. To change an invoice layout, select from the PPS Menu: Tools – Invoice Layout Designer. You can select which invoice layout to use each time you print an invoice. You can select from the PPS Menu: Tools – Invoice Options to set up which layout to use by default for each invoicee type (client, insurance, club, etc.) when you select to print an invoice, the default layout is selected for you.

Invoice - Modify
You can modify an invoice if you want to change or delete the charges include on the invoice, change or delete the payments allocated to the invoice, or you can change or update the invoice details such as address etc. For third-party invoices you can also split-bill the invoice between the third party and the client – *see: Invoice – Split billing for more details*. You can only modify the details of an invoice if the invoice is not marked as "issued". This is designed to prevent you from making changes to an invoice after you have printed it. If you do need to make changes to the invoice, you can "un-tick" the issued box on the invoice screen, then make your changes as necessary. You can modify an invoice from several places in PPS: 1) From the PPS Menu: Account – Accounts, select an account (client/third-party) and highlight an existing invoice in the list, then click <Modify> on the accounts toolbar. 2) From the Client Log screen, select the correct client record, highlight an invoice from the list in the bottom half of the screen and click <Open> on the client log toolbar. 3) From the PPS Menu: Accounts – Invoices / Receipts list, select an invoice from the list and click <Modify>.

Invoice - New
See: Invoice - Raise

Invoice - Number
Each time an invoice is raised, an invoice number is allocated to the invoice. PPS maintains the series of invoice numbers for you. You can set up the invoice number series to use from the PPS Menu: Tools – Options. The invoice number is six digits. Once an invoice number has been used, it cannot be re-used. If an invoice is deleted, the number is not re-used. The invoice number is printed on the invoice in the header section below the Address.

Invoice - Paid
An invoice is marked as paid when a payment (or payments) for the full invoice amount has been allocated to it. The Invoices / Receipts list from the PPS Accounts menu shows which invoices are paid using a "paid" column that shows a tick if the invoice is paid. Also the invoice is shown in the list in a purple colour when it is paid, rather than an orange colour when it is not paid or part paid.
To pay an invoice, you need to record a payment, and allocate the payment to the invoice. There are several points in PPS where this is done for you – for example in PPS Cash Desk your enter the payment details and the payment is automatically allocated to the invoice.

Invoice - Print
You can print an invoice from several places in PPS. You are also prompted to print an invoice at certain points when invoices are created, or payments recorded. If you need to select an invoice to print a copy you can do one of the following: 1) From the PPS Menu: Account – Accounts, select an account (client/third-party) and highlight an existing invoice in the list, then click <Print> on the accounts toolbar. 2) From the Client Log screen, select the correct client record, highlight an invoice from the list in the bottom half of the screen and click <Print> on the client log toolbar. 3) From the PPS Menu: Accounts – Invoices / Receipts list, select an invoice from the list and click <Print>.

Invoice - Raise
To raise an invoice, you first need to create charges. Sometimes you create the charges and the invoice in one step, such as when using PPS Cash Desk, or when creating a charge using the "Consultation Complete" screen or the "Appointment Complete" screen. Using these methods automatically raises the invoice for you behind the scenes. If you raise an invoice using the PPS Menu: Accounts – Raise an Invoice, or click Raise an Invoice from the PPS Task Bar, then you will see the invoices that can be created for the selected client first, before creating them. Once you have raised an invoice it can be printed if required. If you need to raise an invoice directly to a third-party, then make sure that when you are creating the charges that the correct third-party is selected as "who will be invoiced for this charge".

Invoice - Receipt
An Invoice in PPS is an official bill that can be issued for payment by a client. In accounting terms an "Invoice" and "Receipt" is the same thing – a receipt is a printed copy of a "paid" invoice. *See: Invoice for more details*.

Invoice - Split Billing
When an invoice is sent to a third-party, and the invoice includes charges for a single client, you can split the invoice balance between the client and the third-party. This means that payments can be recorded on the client account and the third party account against the same invoice. To split-bill an invoice, you need to modify the invoice to display the invoice screen – *see: Invoice – Modify*. The invoice screen has a Split Billing button which is available when the invoice is to a third-party and the invoice is for a single client. The split billing screen allows you to specify how much of the invoice the client should pay and how much the third-party should pay. If the invoice has been paid or part paid, then this will affect how you can change the balances – you cannot make either amount payable less than the value they have already paid.

Invoice / Receipts List
The Invoice Receipts list is your full list of invoices that you have produced. Select from the PPS Menu: Accounts – Invoices / Receipts List. Each invoice in the list is allocated a number – the number sequence can be set up from the PPS Menu: Tools – Options. On the Invoices / Receipts list, you can click on various column headings to show the list in different orders – the default is Date order (most recent first). Using the left hand side of the screen, you can select which invoices to include in the list including Paid, not paid and client / third-party invoices only.

Invoice Layout Designer
See: Invoice - Layout

Invoice Options
When you create charges in PPS, these can be "destined" to be billed to either the client, or any one of 9 third-party categories (insurance companies, clubs, etc.). You are able to define how invoices are raised and printed to clients and the various third-party categories. These options include: which details are printed on the invoice; which invoice layout to use (you can customise your own layouts for different client/third-party categories); and how the Invoice Date is determined when raising the invoice. You can access the Invoice Options from the PPS Menu: Tools – Invoice Options.

Invoice Processing
Invoice Processing is a quick way to raise invoices from charges you have already created. It is possible (and required for some third-parties that you raise invoices to) to raise charges on a daily basis as clients attend their appointment, but to raise one invoice at the end of a period (week, month etc.). You can access the Invoice Processing option from the PPS Menu: Accounts – Invoice Processing. The invoice processing screen allows you to select to raise "All" invoices or just invoices to "Clients" or "Third-parties". If you are selecting Third-parties you can also select an individual, or all third-parties. You can also select a date range within which charges must fall, or select "All outstanding Charges". When you have made your selection, press the OK button, and a list of all the invoices you can create is displayed. You can either then create your invoices one at a time, or select to create "all" in one go. Once the invoices are raised, you have the option of printing them either individually, or all in one go.

Invoice Report
The Invoice report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Accounts Reports section". This report is a list of the Invoices you have raised. You can select to include just Invoices that have not been paid or have been part paid, etc. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

J

Journal
See: Client Log

K

Known As
When recording your client details, you can select for each client the name that the client is known by to you. This can be useful if the name that you use to refer to the client is different from how you would address the client in letter (you can also specify the "salutation" to use when writing to the client). If you have entered the Known As details, then when the client's details are displayed on most other screens in PPS such as the Clinical Notes and Accounts screens then the "known As" is displayed in parenthesis next to the proper client name thus: Jean Ainsworth (Jeanie)

L

Labels
Labels in PPS are Address labels that you can print and use on envelopes if you do not use window envelopes. Labels are an activity type. When you prepare a label, it can either be printed now or later. PPS Prints to either a dedicated label printer such as the DYMO LabelWriter™ or standard A4 label sheet layout which is 2 across by 8 down. The Avery™ label code for this style of label sheet is L7162. PPS has a label print spool that can be used to print a whole A4 sheet of labels at once, by accumulating individual labels gradually until a whole page is full. Alternatively you can also print a single label on an A4 sheet in any position, so you can run a single A4 sheet through your printer several times printing one or two labels in selected positions each time. To prepare a single label to print now or later, select from the PPS Menu: Activities – Prepare a Label. You can also print many labels at once by selecting "Labels" as the output from a PPS Report. To do this, select from the PPS Menu: Reports – PPS Reports & Mail Merge, then select a suitable report that will produce a list of client names and addresses to prepare labels for such as Client Lists. Run the report through the Report Wizard, and in the report output options select Main Merge. Then on the Mail Merge output screen select Labels. You can also print appointment details on a label when booking a new appointment.

Law Firms
See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Leave / Leave All
When booking an appointment for a client, the client may have outstanding activities scheduled for the future (or other future appointments booked) that now need to be dealt with or cancelled because of the appointment you are now making. PPS checks this each time an appointment is booked. If there are any outstanding activities or appointments, you are shown a list of this and have the option to either "Leave" them or "Delete" them. If there are several outstanding, then you can click <Leave All> to leave them all alone – the future activities will remain scheduled.

Letter Layout Designer
This is the template that is used to print letters in PPS. PPS has its own simple word processor built in that you can use if you do not have access to use Microsoft® Word. You can change the basic template of the letter to use your own preferred fonts, and include your own practice logo if required. You will need to be careful of the type of changes that you make to the layout, as incorrect changes to the layout can cause letter printing to fail. In this case you may have to revert back to the original layout and try making your changes again. To change the letter layout, select from the PPS Menu: Tools – Letter Layout Designer. You can either select to modify the layout, or revert to the default layout. There is another option on the PPS Tools menu – Set up PPS Letterhead. This option can be used to enter your practice name/address/contact details without the need to change the letter layout using the layout designer.

Letterhead- Set up
When using standard PPS Letters, you can set up your own practice name/address/contact details. These will be printed on the standard PPS Letterhead if you are using PPS to print your letters rather than Microsoft® Word. If you are using Microsoft® Word, then these details are still used when printing Invoices, and some other printouts such as clinical notes prints. You can enter your name, address and contact details as required, and select to "include" these details when printing letters and invoices.

Letters
Letters are an activity type in PPS. You can select at any time to send a letter to either a client or a third-party. You can send a letter either by selecting from the PPS Menu: Activities – Send a Letter, or by selecting "Send a Letter" from the PPS Task Bar. In addition you can also select to send a letter as part of your clinical notes recording. When you send a letter, you have the choice of either selecting a standard letter from your list of standard PPS letters (*see: Standard Letters*), or by simply typing your letter using the PPS letter editor before printing and sending. Letters can either be sent now or scheduled to be sent in the future. If you are using Microsoft® Word to print your letters, then your list of standard letters (which can include very simple templates that simply have the client's address/salutation details at the top) will include letters that you have set up in Word. If you are sending a letter as part of a Mail Merge output from a PPS Report, then this will be a PPS letter. To do a mail merge using a Word letter, you will have to produce a "File" output from the PPS mail merge output screen, and do the mail merge separately and completely in Word.

Line
See: Charts - Annotations

List
List is the term used to describe information that either appears on the screen or on a report in rows and columns. The term List is also used in PPS as a list of items such as menu, or list of entries such as a look up table. *See also: List style diary*.

List Style Diary
The PPS Appointments Diary can be displayed in a variety of ways, with various numbers of rows, columns and viewed by diary user or by treatment room. You can also select to view the diary in two basic styles: List style and Diary style. The list style diary displays all your free appointment slots in a "list" in each column – each entry in the list is the next free slot. This way you can clearly distinguish free appointments from booked appointments by the "gaps" in the list. To select the list style diary view, from the Appointments Diary, select from the PPS Menu: Diary – Select Diary View.

Live Database
PPS includes a "Demonstration Database" and a "Live database". You can select which database to log into from the PPS Log In screen. You may have a different log in ID and password to access each database. You can only access the "Live" database in the "Registered" version of PPS.

Local Authorities
See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Location
A Location in PPS is a physical clinic location. Older versions of PPS referred to treatment rooms as locations. Now Treatment Rooms are an additional field of information. You can set up locations to use in your PPS Appointments Diary. You can set up your diary for diary users/practitioners to be scheduled to work either in specific treatment rooms and/or locations on various days during the week. You do not have to use "Location" if you only work from one location. To set up locations, select from the PPS Menu: Tools – Look Up Tables, and select Location from the Appointments Diary Tables section. Here you can set up your various locations, and nominate a colour to each location to make each location clearly identifiable in the diary.

Lock
You can select to "lock" PPS if you are moving away from the computer and you want to ensure that unauthorised users, or non-staff members cannot step in front of the screen and access your PPS records. To lock PPS, either select from the PPS Menu: File – Lock PPS, or simply press Ctrl-F1 on the

keyboard. You will have to enter your PPS log in password to unlock PPS.

Log

See: Client Log

Logging In

In order to access PPS, you have to "Log In" using a log in ID and a password. If you are the only (or main) user of PPS, then you will be the PPS System Administrator which means that you are responsible for setting up other users, and setting up their log in ID and password that they will use to access PPS. It is important for each user to have their own log in details as the user's initials are used as part of the date/time stamp whenever a record is added or updated on the system. The log in ID can be up to 10 characters with no spaces, and the password can be up to 8 characters with no spaces. The log in ID and password are always in capital letters, so they are not case-sensitive.

Look Up Tables

Look up Tables are used in PPS to control the entries that are allowed in certain fields. This means that you can restrict what values are input to just those that you want recorded. For example, when adding a new appointment, the "Appointment Type" look up table can contain entries such as "Initial Assessment", "New Patient" or "Hydrotherapy". This helps when running reports as you can select to break down the results of your report by the look up table entry thus minimising the number of different entries (especially slight variations of spellings!).

Some Look Up tables will store additional default values. For example the "Appointment Type" table can optionally have a Charge Codes associated with each entry. When the selected entry is used for an appointment, the charge code will be automatically selected for you when you create the charge for the appointment.

Look Up Tables are set up and maintained using the PPS Menu: Tools – Look Up Tables.

You can control which of your PPS users has access to setting up and maintaining Look Up Tables as part of the PPS Access Control system.

Also see the entry under the name of each Look Up Table e.g. Occupation

M

Mail Merge

A mail merge is when you want to send a standard letter to several of, or all your clients in one go. You can produce a Mail Merge in PPS using PPS Reports. Most PPS reports have Mail Merge as one of the output options. As an example, you can use the Client List Report to produce a mail merge. This means that instead of printing your list of clients, the same list is used as the names/addresses list to merge with a standard letter to send to each client included on the report. This gives you great flexibility for producing mail merges, as it means that you can manipulate the selections and criteria for your report first to produce a very precise list of clients to be included in the mail merge. For example, you can select to write to clients you have recorded as having a certain pre-existing condition such as diabetes, or all Female clients within a certain age range and so on, giving you great opportunities to send fairly specific targeted mailings to chosen groups of your clients. You can also use the mail merge feature to send bulk e-mails to your clients using the same mail merge options. To produce a mail merge, select from the PPS Menu: Reports – PPS Reports & Mail Merge, then select a report to run that will give you the results you need for your mail merge, for example Client List report. Use the report wizard to make any specific selections for your report, for example "clients who you last saw more than six months ago" can be selected using "Last occurrence" on step 1, and a date range of "From" date=blank and "To" date = the date as of six months ago. When you have finished your selections, click <Finish>, then on the Report Output screen click <Mail Merge>. Then on the Mail Merge output screen you have the option to either select Letters & E-Mail where you can use the PPS Letter editor to send a standard PPS letter to your clients included in the report, or select to produce a File which you can use with another mail merge program such as Microsoft Word. Alternatively, you can use Labels to prepare a mailing label for each client in your list also.

Mailing Labels

See: labels

Main Client Details

See: various entries under Client

Maintenance

See: Database Maintenance

Maintenance - Custom Form

See: Custom Form - Maintenance

Management Reports

See: Reports

Manager - Custom Form

See: Custom Form - Manager

Mandatory

Mandatory is the term used in PPS Custom Forms when a question included on the form must be answered. If you are setting up your own forms, you can decide if each question is mandatory or not.

Marker

See: Charts - Annotations

Medical History

You can set up your own medical history questionnaire, then complete the questionnaire for each client as appropriate. The questionnaire is set up in the form of a Yes/No answer questionnaire. For each question, you can select to be alerted if Yes, or No is answered (as appropriate) to each question. To set up your medical history questionnaire, select from the PPS Menu: Tools – Set Up Medical History. To complete a medical history questionnaire for a client go to the main client details screen: select from the PPS Menu: Client – Main Client Details, or click Client Details on the PPS Task Bar. From the main client details screen, use the <History> button on the client screen toolbar. Once you have completed the questionnaire, any questions that have been answered "adversely" you are informed of these in the Client Log screen, and in the Medical History drop down section of the Consultation screen. You can update the medical history details while reviewing them if necessary from either of these screens.

Merge Field

A Merge Field is used when preparing Standard PPS Letters, or sending a one-off letter to a client or third-party. There are a variety of Merge Fields to choose from including Name, Address, Date, Practitioner, etc. When a merge field is included in a standard letter (or you insert a merge field into a one-off letter) then the merge field entry is replaced with the "real" value for the selected client. Merge Fields are shown with the field name enclosed in double chevrons thus: <<SURNAME>>. When the letter is printed, this value is replaced with the actual client's surname. You can insert Merge Fields when you are setting up standard PPS letters – *see: Standard Letters for more details*.

Message
A message is a PPS activity type, and is part of an internal PPS messaging system that can be used between users of PPS on a network of more than one computer. This is a simple text message (that can be optionally related to a client) and can be sent from one PPS user to another, or all other users. When PPS is running on a network of computers in your practice, this means that instant messages can be sent between users on different computers. To send a message, select either from the PPS Menu: Activities – Send a Message, or click Send a Message on the PPS Task Bar. You can then type in the message, and select who the message should be sent to. If you send the message to All Users, then each user will receive their own copy of the message. PPS will check for messages every *n* seconds while you are logged into PPS. When you receive a message, a pop-up window appears informing you of the message, here you can choose to either read the message, or postpone it for a while where it will pop up again later. To set up how often PPS automatically checks for messages, select from the PPS Menu: Tools – Set up System Users, and select the user from the list, and click <Modify>. The User Profile screen includes a setting to determine how many seconds or minutes PPS checks for messages. 60 seconds is normally a good setting.
Also See: E-Mail; SMS Message

Microsoft® Windows™
Windows™ is the name of the "operating system" that you use on your computer. PPS can be installed and used on a computer that runs "Microsoft Windows". There are several different versions of Microsoft Windows, for example Windows XP, Windows 2000 and Windows 2003. PPS can be installed and used on all Windows versions except Windows 95 which is an older version.

Microsoft® Word
Microsoft® Word is a Word Processing application. It is supplied as part of Microsoft® Office. PPS can use Word to produce individual letters to clients or third-parties. This can be done by setting up a PPS Standard Letter which is a "Word Document". This standard letter can then be used when sending a letter to a client or third-party. *See also: Standard Letters; Letters*.

Modify
This is the term used throughout PPS to "change" any of your existing records. PPS has buttons on many screens with a <Modify> prompt. Clicking this button will normally take you onto a further screen that allows you to modify the selected details. For more information about modifying various types of record in PPS, see the "modify" entry under the various section of this help guide, for example Invoices – Modify, Appointments – Modify, etc.

Move
See: Appointment - Move

Move Appointment
See: Appointment - Move

Multi-User
See: Network

N

Network
You can run PPS on your PC Local Area Network. If you need to run PPS across a "wide network" or across the internet, then you will need to talk to your PPS supplier for details of how to do this.

If you would like to run PPS on your local network, then make sure that your PPS licence includes the appropriate number of "concurrent" users required (the number of users who can log into PPS at the same time). Extra concurrent licences can be purchased from your PPS Supplier. You are sent a new PPS Registration File each time you purchase more licences.

In order to install PPS on a PC on your network, first make sure that the location that the main PPS database is installed is "shared" on the network, and allows "other users to update files". Doing this ensures that the "network installation" of PPS can locate the database across the network and successfully log into the database.

Also See: Installation New
Look up this under the type of new record – e.g. appointment - new

Non-Availability Reasons
When blocking out individual appointment slots in the diary to make them Not Available, you can assign a reason why you are not available. This entry could typically be "Break" or "Meeting" etc. (*see: Block Appointment for more details*). To set up your list of Non-availability reasons, select from the PPS Menu: Tools – Look up Tables, then select Non-Availability Reasons from the Appointments Diary Section.

Notes
See: Client - Default Notes Entry

Notes
See: Client - Notes

Notify
Within the PPS Activities system, you can set any activity record to "notify" you when it becomes due. To do this, the activity must have a relevant "due date", and optionally a "due time". If an activity has a "due time" then it will become due at that precise time. PPS can be set up to notify you during the day of activities that become due at a precise time. You can set for each systems user how often PPS checks for messages and activities. If an activity does not have a "due time", or the activity became due whilst you were not logged into PPS, then you will be alerted about all activities that are now due when you log into PPS.

O

Occupation
This is one of the PPS Look Up Tables. It is entered on the Main Client Details screen. It is a list of your client's occupations. You do not have to enter the occupation if you do not want to. The occupation can be used to breakdown various reports by, and the occupation can often be useful information to know if the client's occupation can affect the treatment you provide. You can access the Occupation Look up table to add your own entries – select from the PPS Menu: Tools – Look up Tables.

OK Button
Many screens in PPS use an "OK" button as a way of closing that screen, this will save any details you have entered to that screen. The OK button is often used alongside a Cancel button which will close the screen without saving your changes.

Open
Some screens in PPS have an "Open" button on the toolbar, this is very similar to the Modify button as it will "open" the selected record for "modification".

Options
PPS has a screen on the PPS Tools menu called Options. This screen can be used to set up a wide variety of system settings

that affect the way that PPS works. You can make your changes to these areas and press the OK or Apply button to save your changes. The Options screen has four tabs along the top: General, Custom Client Fields, Set Up Client Contacts, and Clinical Notes. See the entries under each of these sections for more details, for example Options – General.

Options - Appointments Diary

See: Appointments Diary Options

Options – Clinical Notes

This screen is accessed from the PPS Menu: Tools – Options, and select the "Clinical Notes" Tab. The entries on this screen are the headings that are used when you are recording clinical notes. The Consultation screen in PPS allows you to store notes in six different fields, you can set up the first five fields, and the sixth field is called "General". If you do not want to use all five fields, leave the ones blank that you do not need to use. When you have made your changes, press the <Apply> or <OK> button to save your changes.

Options – Custom Client Fields

This screen is accessed from the PPS Menu: Tools – Options, and select the "Custom Client Fields" Tab. With this screen you can customise the various fields that you can use on the main client details screen. All of these fields bar the first two are optional and you can set up these to your own requirements. When you have set up your required headings, these will appear in the "Profile" section of the main client details screen. Each time you add a new client record, you can select to automatically include any of these fields in the "summary" profile information that appears on the client log screen and the consultation "profile summary". This can be changed per client as you add each new client record. When you have made your changes, press the <Apply> or <OK> button to save your changes.

Options - General

This screen is accessed from the PPS Menu: Tools – Options, and select the "General" Tab. These settings affect the way that PPS works. This screen allows you to change the following settings: PPS Generated Numbers: These are numbers that PPS issues to new clients, third-party contacts and invoices. You will normally only need to set up these numbers once when you are setting up PPS. Tax Settings: here you need to select if your company is registered for Sales Tax (VAT), and you can set up what your local sales tax is called – the default is "VAT". You can also set up your list of tax codes. You will need to save your updates to tax codes using the <Save Your Updates> button as they are saved separate to the rest of the details on the screen. You can also set up how often PPS checks for a back up being made – you are prompted if you do not make a backup within this period. You can select for PPS to display a "faded" light blue background to the screens, or a simple light blue background. You may need to switch this option off if you are using PPS over an internet connection, as the number of colours used across an internet connection is lower and the faded background will appear in "bands" rather than a smooth fade out. You can also select for the Client Log screen to show its transaction list either in colour or black. "Colour" shows various entries in the colour appropriate to their status – i.e. a completed appointment in purple, a non-invoiced charge in green etc. When you have made your changes, press the <Apply> or <OK> button to save your changes.

Options – Set up Client Contacts

This screen is accessed from the PPS Menu: Tools – Options, and select the "Set up Client Contacts" Tab. With this screen you can customise your third-party contacts that are allocated to your client records. PPS has 9 different third-party types – each of which is shown on this screen. The purpose of this screen is for you to choose how you locally refer to these contact types, and how you want to use then in PPS. For example, in the UK "Doctor" is referred to as GP (General Practitioner), this is your family doctor and you may refer to this in another way locally. The same applies to all other contact types. You can enter a "collective term" for each type, an individual contact name, and a company name. Not all contact types will use a contact *and* company name – enter one or the other as appropriate. The Text and Numeric entry allow you to store additional details along with ach third party, as an example, for an insurance company you may also store policy number and policy excess. The "format" column allows you to specify how the number entry is made. Select the Notes column for each contact type if you want to also include a Free Text notes entry each time you assign a third-party of this type to a client. Each time you add a new client record, you can select to automatically include any of these entries in the "summary" profile information that appears on the client log screen and the consultation "profile summary". This can be changed per client as you add each new client record. When you have made your changes, press the <Save Your Updates> button to save your changes – these changes are not otherwise saved when you use the <OK> or <Apply> button.

Order

This term applies to the Order in which information is listed on the screen. Information in PPS is often listed in a "Grid" with rows and columns; you can often click on the column headings to change the order in which the information is displayed. There is also a Client Browse screen that includes an "order" selection to allow the client details to be displayed in a variety of orders such as Surname, etc.

Other Companies

See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Other Contacts

See: Contacts (Third-Party) – Contact Types; Client –Third-Party Contacts

Outcome

When completing a Treatment Episode as part of your clinical notes records, you can enter Outcome details. This can be useful for reporting purposes to help analyse the type of problems you are treating. The Outcome will normally describe the clinical outcome to your treatment and will be an entry such as: "Maintenance Achieved", or "Problem resolved". There is a "Outcome Codes" table where you can set up your standard list of Outcome entries. To set up this table, select from the PPS Menu: Tools – Look Up Tables, and select the Outcome table from the Clinical Notes section. To make an Outcome entry as part of your clinical notes, from the PPS Consultation screen either use the <Update> button towards the top of the screen – this updates the Treatment Episode details for this consultation, or when completing the consultation enter the Outcome details in the Treatment Episode details screen (can be accessed using the <More> button in section 1) of the Consultation Complete screen. The Outcome can be selected as a Breakdown option on many reports – especially clinical notes type reports.

Outstanding (Activities)

Activities that are either now due or due in the future are referred to as "outstanding".

Overdue

See: Activities – Status

P

Part Payment

See: Payments – Part Payments

Patient

See: Client

Payment
A Payment in PPS is recorded when money is received from clients or third-parties. A payment must be allocated to an invoice – either immediately or in the future. If a payment is received in advance (a pre-payment) for consultations or treatment that has not yet been carried out, then the payment can be allocated to the invoice in the future when the invoice is raised. Payments are either recorded using a specific PPS screen to "record a payment", or are automatically recorded when an invoice or charge is raised and "marked as paid". If payments are received from third-parties, then these are recorded on the third-parties own accounts screen where the invoices to the third party will appear. If payments are received from clients, the these are recorded on the client's own accounts screen.

Payment – Allocating
You can either allocate a payment as soon as it is received, or later. You will normally allocate a payment as soon as it is received unless it is a pre-payment for consultations or treatment that has not yet been carried out, in which case the payment can be recorded now and left as "un-allocated" on the account. It can be allocated later when the charge/invoice is raised. When you record a payment, you will either need to select which invoice (or invoices) the payment is allocated to, or PPS may do this automatically depending upon how the payment has been recorded, and which outstanding invoices exist on the account. If you are recording a payment, a "Payment Allocation" screen is used to allow you to select which invoice (or invoices) the payment should be allocated to. This screen does not always appear if the payment is automatically allocated to an invoice.

Payment - Modify
You can modify details of an existing payment, or change which invoice (or invoices) the payment is allocated to. A payment record is shown in the PPS Accounts screen and in the Client Log screen. You can also modify a payment from the Modify Invoice screen. When you modify a payment, the Payment Allocation screen is displayed where you can change the details of the payment and allocation as required.

Payment - New
See: Payment – Record a payment.

Payment - Part Payments
Part payments are where an invoice is not fully paid. If a third-party invoice is part paid, then the balance due on the invoice can be re-directed to the client if required – *see: invoice – split billing for more details*.

Payment - Receipt
You can print a simple payment receipt. This is often used when a payment has been received and recorded in PPS, but not allocated to an invoice. The payment receipt is a simple A4 layout that includes the payment details and "received with thanks" text. If a receipt is required after a payment has been allocated to an invoice (or invoices) then the invoice can be printed and this will clearly show the payment details.

Payment - Record a Payment
You can record a payment is PPS in a variety of ways. Sometimes a payment is recorded for you, for example if you are raising an invoice and "mark" it as paid at the point that the invoice is created; or if you are completing an appointment or consultation and you simply mark the charge as paid. To record a payment you have received that is for an existing invoice (either client or third-party), this can be done in a variety of ways: 1) select from the PPS Menu: Accounts – Record a Payment; 2) click on "Record a Payment" on the PPS Task Bar; 3) from the PPS Accounts screen click <New> and select "record a payment" from the pop-up menu; 4) From the Invoice Details screen (displayed when modifying an existing invoice), click the <Payments> button and select to record a new payment; 5) from the Payments List screen – click <New>. All of these options will display the "Record a Payment" screen. From this screen, there are three steps to select the correct account to record the payment for, to check the current outstanding balance and to record details of the payment and (optionally) allocate the payment.

Payment Method
PPS has a list of Payment Methods that you can set up and use. These include Cash, Credit Card, etc. You select from a list of payment methods when you are recording a payment. This important information enables you to reconcile your accounts records for each day, week, etc. as monies received via different methods will appear in different places and times in your bank statements, etc. You can set up your list of payment methods from the PPS Menu: Tools – Look up Tables. You can also select to include your most common payment methods in the Cash Desk Quick buttons.

Payments List
The Payments List screen is available from the PPS Menu: Accounts. This is a full list of all payments you have recorded – including payments that have been created by PPS Cash Desk, and when charges and invoices have been raised and marked as paid. You can select to record a new payment, or modify or delete a existing payment. There are options available to the left of the screen that allow you to select which payments to include in the list. These options can be helpful to view only payments from a selected source, or to only view third-party payments.

Payments Report
The Payments report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Accounts Reports section". This report is a list of the Payments you have recorded. You can select to include just payments that have not been allocated or have been part allocated, etc. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Personal Action
A Personal Action is a PPS Activity record. You can use a personal action as a personal reminder, or "to-do" item. A personal action can optionally be related to a client or a third-party contact. You can create a "Personal Action" in a variety of ways: 1) select from the PPS Menu: Activities – New Personal Action; 2) select from the PPS Menu: Activities – Activities List, then click the <New> button and select Personal Action. As with all PPS activities, you can select a Due Date and Time, priority, select which practitioner is responsible for the activity, and which system user is responsible for completing the activity. You can enter a heading and notes – these describe the activity, or detail your actions towards completing the activity. All activities have a selection of options to include the activity on the daily task list and the appointments diary printout. You can enter completion details when the activity is complete, or postpone the activity to become due at a later date.

Photographs
See: Charts; Document Library

Pictures
See: Charts

Planner
See: Appointments Diary – Setting Up

Point Of Sale
See: Cash Desk

Post Code
The Post Code is used as part of the Client or third-party contact address. It does not have to be entered if you do not used postal codes in your area. You can search for a client or

third-party contact using the address. The client search screen has a specific entry to enter all or part of the post code to search for. On the Client Browse screen you can select to view your client records in post code order.

PPS
PPS is the acronym for "Private Practice Software".

PPS Expense
PPS Expense is an additional module in PPS that can be used to record practice expenditure. You can enter one record per expense item including which expenditure category the item is for your accounts records. You can also indicate when an item was paid. To access PPS Expense, select from the PPS Menu: Accounts –Expenditure Management. This shows your list of existing Expenditure records where you can Add new records, or highlight and modify/delete existing records. You can use options to the left hand side of the expenses list screen to select to show Expenditure records that are paid/not paid, or to filter the list to only show certain types of records.

PPS Registration
Registration is the process of "un-locking" PPS to allow you to use the Live database in PPS. The demonstration database has a limit to the number of records that can be added. This limit is 50 records in each part of the system (50 clients, 50 appointments, etc). The live database has no limit. If you have a registration file, you can use the PPS log in screen to register PPS, or if you are currently logged into the demonstration database, you can use the "PPS Registration" option of the "Tools" menu. The PPS Registration file has you own details stored in it as the registered PPS user, in addition it contains your PPS serial number and details of the options within PPS that you are allowed to use (such as clinical notes etc.). The PPS registration file also controls how many users can log into PPS simultaneously when PPS is installed on a network. Your PPS registration cannot be transferred to another PPS user without the written consent of Rushcliff Ltd. Your PPS registration can only be used on one installation of PPS for "live" use. You can use your PPS registration on a back up copy of your live system provided that you are not using this system to operate its own live database.

PPS Sync
PPS Sync in the process of running two or more PPS systems and keeping the databases up-to-date between these systems by synchronising their data. This has a variety of uses including taking a laptop computer away from the practice, making updates to the laptop whilst the main copy of PPS at the practice is still being updated, then synchronising both systems together so that both are up-to-date later on. PPS Sync is a special feature of PPS and includes its own documentation and installation instructions. Please refer to your PPS supplier for more details.

Practice Expenditure Report
The Practice Expenditure report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Accounts Reports section". This report is a list of the PPS Expense records you have created. You can select to include just purchases that have not been Paid or have not been Paid. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Practitioner
A practitioner in PPS is a system user. To add a practitioner to PPS, you need to add a new system user, and indicate that they are a practitioner as part of their user details. When a user is a practitioner, they appear on the list of practitioners to select to allocate to most PPS records. PPS allocates a practitioner to most types of records so that you can see which practitioner is responsible for that record, also you can break down most report in PPS by practitioner.

Practitioner Commission
See: Commission; Practitioner Commission Report

Practitioner Commission Report
The Practitioner Commission report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Accounts Reports section". This report shows commission due to your practitioners. The commission is calculated from both the Standard practitioner commission rate (entered as part of the User Profile) and entries in the Commission rates table. You can select to produce the report based upon either charges raised, Invoices raised or payments allocated to invoices – depending upon how you pay your commission to your practitioners. You can not produce the report for payments that you have recorded but not yet allocated to invoices as the commission rates are dependant upon charges you have included on your invoices. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Preview
See: Reports – Report Output

Prime Contact
See: Client – Prime Contact Details

Print
You can print various types of information in PPS including client details, clinical notes, Invoices, letters, and a wide variety of reports. All printing in PPS is done using your standard Windows printer driver for your selected printer. Many screens in PPS have a <Print> button that is used to print details for that part of the system. *See also: Reports – Report Output*.

Printing
See: Print

Private
See: Clinical Notes – Public/Private; Custom Forms – Public Private

Processing – Invoice
See: Invoice Processing

Profile
The Main Client Details screen in PPS includes a "Profile" section. This is where you store specific information about each client including their "source of introduction" and "occupation". You can set up your own profile details. This allows you to specify your own field headings which suit the type of details you need to store suitable to your business area. To set up the client profile fields select from the PPS Menu: Tools – Options, and select the Custom Client Fields tab. *see: Options – Custom Client Fields* for more details.

Profile – User
See: User Profiles

Public
See: Clinical Notes – Public/Private; Custom Forms – Public Private

Public Holiday
See: Calendar Dates

Q

Quantity
When creating a charges record, or using PPS Cash Desk, you can enter a quantity with your charge details. Use this if you need to create a charge for more than one of the same item. The Quantity entry appears on the "Create a Charge" screen. On PPS Cash desk you can use the <Quantity>button for any charge item. To use a quantity of more than one, first enter the quantity, then press the quantity button, then enter the charge code. Other parts of PPS that create charges such as the Appointment Complete screen or the Consultation Complete screen always use a quantity of 1. this cannot be changed on these screens.

R

Raise Charge
See: Charges – Creating

Raise Invoice
See: Invoice – Raising

Reason for Consultation
This general term has been used specifically in older versions of PPS as an entry on the consultation screen. There are various new ways of defining this in information in PPS. You can use the Appointment Type entry against each appointment. You can also use one of several entries on the Treatment Episode details such as Diagnosis code or Treatment Cateogry.

Reason for Non-Attendance
See: RFNA

Receipt
See: Invoice; Accounts - Printing

Record (Database Record)
A record is a single line entry in a database, or table – often referred to via the type of information for example client records, invoice records.

Record Payment
See: Payment – Record a Payment

Rectangle
See: Charts - Annotations

Referral
This is a Look up Table that is used on the Treatment Episode details. The list can be used to help you categorise your sources of referral for each treatment episode in order to make your clinical notes reports more meaningful. You can set up your list of referral sources by selecting from the PPS Menu: Tools – Look up Tables, and selecting Referral from the Clinical Notes Tables section. You do not have to use the Referral entry on your Treatment Episode details if you do not want to. The Referral entry selected for each treatment episode is stored separately to the Source of Introduction on the Main Client Details screen. This is so that you can not only monitor where your clients initially heard about your clinic from , but also where your repeat business comes from.

Refresh
See: Client Log - Refresh; Appointments Diary - Refresh; Daily Appointments List - Refresh; Accounts Screen - Refresh

Registration
See Also : PPS Registration; Client – Registration

Reindex Data Files
This option is available from the PPS Menu: Tools – Database Maintenance. This option is used to perform routine maintenance on your records including archiving older activity records, and to re-build the index entries for all your records. The index entries are maintained as part of making sure that your information can be accessed quickly by PPS so it is good practice to run this option at regular intervals, perhaps once per week. The Reindex option can also fix some types of damage caused to your records by power failures or computer crashes. PPS keeps track of whether or not you properly closed down last time you finished using PPS. If it detects that you may not have closed down properly last time, it will suggest that you run the reindex option.

Reminders
See: Activities; Appointment - Reminders

Repeat
See: Appointment – Repeat; Diary Week – Repeat; Block Appointment - Repeat

Repeat Appointments
See: Appointment - Repeat

Report Output
See: Reports – Report Output

Report Wizard
The PPS Report Wizard guides you through your selections for all PPS reports. The report wizard screen can be accessed from any of the reports available on the PPS reports selection screen – from the PPS Menu: Reports – PPS Reports & Mail Merge. Select any report from any section and click <Open> - this shows the Report Wizard screen. The screen has five "tabs" along the top – these are the "five steps" of selections that you can make. Not all reports show all five steps, when one of the steps is not applicable it will be low-lighted – the screen will show step *n* of 4 instead *n* of 5. The five steps are: Select, Date range, Include, Breakdown, and Criteria – *see: entries in this reference guide for each of these selections for more details, for example: Report Wizard – Date Range*. When you have finished your selections in the report wizard, you can use the <Finish> button to proceed to the report output screen, or use the <Add to Favourites> button to add this report, including all your report wizard selections to your Favourites list.

Report Wizard - Adding to Favourites
If you have made your selections in the report wizard for a report that you would like to run regularly, then you can use the <Add to Favourites> button on the report wizard screen, and save this report including all your selections to your list of Favourite reports. Once the report is added to your favourites, you can run the report from the Favourites section of the PPS Reports screen. If you use the <Open> button to run the report, then any changes you make to the criteria for the report can be updated on your favourites list using the <Update Favourites> button which is displayed in place of the <Add to Favourites> button.

Report Wizard - Breakdown
On the Report Wizard screen, the **Breakdown** step allows you to determine if/how the report results are broken down into groups. There is a wide range of breakdown options available suited to each report. Each breakdown selection will include its own sub-totals. When you breakdown by more than one field, then the results are "nested" – for example if you choose to breakdown the results by Month then by Practitioner, you will see a sub-total for each practitioner for each month, whereas if you choose to breakdown the results by Practitioner then by Month, you will see a sub-total for each month for each Practitioner.

Report Wizard - Criteria
On the Report Wizard screen, the **Criteria** step allows you to specify further criteria to restrict which records are included in your report. There is a wide range of criteria available suited to each report. Select a criteria field, then a condition, then (if appropriate) a value – for example to limit your report to clients of a certain age, select Age, is equal to, 40. To process an age range, make two criteria entries where the first *condition* is *equal to or greater than* and the second is *equal to or less than*. The two entries will combine to give the criteria for your report thus: Age is Equal to or greater than 40, and Age is Equal to or less than 50. This will include only clients who are between 40 and 50 in your report. When using more than one criteria, as in this example, you can use either *AND* or *OR* to join the two criteria together. You must be careful when using *OR* – in the above example if you used *OR* then all your clients would fall into one category *OR* the other, as everyone is either above 40 *OR* below 50 – think about it!

Report Wizard - Date Range
On the Report Wizard screen, the **Date Range** step allows you to select a "start" and "end" date for the report. This page does include some "popular" date selections such as "last month" where clicking this will insert the correct date range for you. On some reports you also select where there is a choice of dates to apply your date range to, for example apply to "date paid" or "date invoiced".

Report Wizard - Include
On the Report Wizard screen, the **Include** step allows you to select on some reports what information to include on the printout. For example on a client report, you can select to include the address, contact numbers, etc on the printout as well as the client name.

Report Wizard - Select
On the Report Wizard screen, the **Select** step allows you to select which records to select for the report. This varies per report but can include a practitioner selection to run the report for one practitioner only, or to select only to include "non-invoiced charges" for example**.**

Reports
PPS includes many different reports that you can run that present information accumulated from various parts of the system. There are two main reports options: Summaries and Statistics, and PPS Reports and Mail Merge. In addition to these two main options, there is a variety of other print-outs that you can produce from PPS that are not included in the category of reports. These include: Printing the Diary, Client Details, Medical History and Clinical Notes. You can access the PPS reports options from the PPS Menu: Reports. For more details about the Statistics & Summaries type reports, *see: Statistics & Summaries*. When you select the PPS Reports & Mail Merge option, a reports selection screen appears – this screen is divided into the various categories of reports that you can run. Most reports (certainly client-based reports) can also be used for mail merge purposes. Select a report from any of the categories and use either the Run option (*see: Reports – Run*) or the Open option (*see: reports – Open*). When you select Open, you will be guided through the Report Wizard (*see: Report Wizard*) to allow you to make your specific selections for the report before choosing a report output option (*see: Reports – Report Output*). *See also: various entries in this reference guide under Reports* for further details. For details of individual reports, *see: the entry under the report name, for example Charges Report or Aged Debtors Report*.

Reports - Favourites
See: Favourites

Reports - List Style Reports
There are several List Style reports that present your information in a formatted layout and include column sub-totals and totals as appropriate. The List Style reports in PPS include: Client Lists, Activity Lists, Invoice Lists, etc. These reports are available from the reports selection screen from the PPS Menu: Reports – PPS Reports & Mail Merge.

Reports - Open
To Open a report, select from the PPS Menu: Reports – PPS Reports and Mail Merge, then select a report from any category and click <Open>. When you "Open" a report, you go through the Report Wizard screen and make your selections for the report before clicking the <Finish> button. If there is a report that you regularly use, you can add this report – including all your report wizard selections – to your Favourites list. This way, next time you select the report, you can just use the "Run" option from the report selection screen rather than "Open".

Reports - Report Output
Each time you run a report, you are presented with a selection of Output Options: Print, Preview, Mail Merge, To File and Close. The Print and Preview options show the report results in a pre-formatted layout designed to present the information in a suitable way based upon which report you are running. The preview option allows you to view the printed report on screen – you can use this to check through the report first (and check to see how many pages the report is) before printing. It may be the case that simply previewing the report gives you the information you need without the need to waste paper by printing the report to the printer. The Mail Merge output option takes you to a Mail Merge Output screen where you can select further output options for your mail merge – *see: Mail Merge for more details*. The "To File" option allows you to copy the report results to a file. This file can be in a variety of formats including CSV or Tab Text, or Excel. When you have saved the file, you can open the file using another application such as Excel to view the results in more detail.

Reports - Report Wizard
See: Report Wizard

Reports - Run
To Run a report, select from the PPS Menu: Reports – PPS Reports and Mail Merge, then select a report from any category and click <Run>. When you "Run" a report, you skip the Report Wizard and just enter a date selection for the report. This can be useful especially for a report that you have added to your favourites list, where all the report wizard selections have already been made.

Reports - Statistics Reports
There are several statistics reports that process and consolidate your records and present a statistical analysis of results. In addition there is also a specific "Statistics and Summaries" report option that allows you to prepare graphs for a variety of criteria (*see: Statistics & Summaries for more details*). The Statistics reports in PPS include: Treatment Episode statistics, Consultation statistics and Diary Statistics. These reports are available from the reports selection screen from the PPS Menu: Reports – PPS Reports & Mail Merge. Other more detailed reports are called "list style" reports.

Restore
You should Back Up your PPS data regularly. This means that if your computer breaks down, or you have a power cut and your PPS database is damaged, then you can restore from your most recent back up. It is not un-common for PPS users to forget to back up their data, then have a problem with their computer which can mean that their data is lost forever. If you back up your data at least once per day, then the most information you can lose is just one day's work. If you need to restore your data, and you have used the PPS Back Up option to back up your data, then you can use the PPS Restore option to restore your data from your most recent back up. You can access the PPS Restore option from the PPS Menu: Tools – Restore. This screen allows you to select a previous back up file, check its contents and restore the information. Be warned that you should ONLY use this option if you have to, as this

option WILL OVERWRITE YOUR CURRENT RECORDS with the records saved to the back up.

Retry

See: Error Messages

Revenue

All PPS Accounts records concerned with billing, are part of your practice Revenue. In PPS terms this equates to Charges Invoices and Payments. All these constitute your practice revenue. Because each of these three records has their own date, you can view your revenue using PPS reports in a variety of ways this does mean that running a Charges report, Invoice report and Payments report for the same month will not necessarily show the same revenue figures because the *Charge* date may not be the same as the *Invoice* date, or the *Payment* date. Where the term "Revenue" is used in PPS – for example on the Statistics & Summaries screen, then PPS will explain which figures it will use for revenue – in this case Charges.

Revert

Some screens in PPS use a <Revert> button on the tool bar. This means that if you have made any changes to the details on this screen you can use the <Revert> button to cancel those changes and reset the screen back to the previously saved version of that record.

RFNA (Reason for Non-Attendance)

When a client does not attend an appointment, for whatever reason, PPS refers to this as a DNA. When you mark an appointment as DNA, you can optionally select a Reason for Non-Attendance. Selecting this has several advantages. Firstly your standard list of RFNA entries can be used when running reports to show the more common reason why clients fail to attend there appointment. Secondly each different RFNA entry can have a charge code associated with it – when selecting one of these whilst marking an appointment as DNA; you are prompted to raise the charge for the appointment (cancellation charge etc.). Finally the RFNA can determine whether or not the appointment slot is re-opened so that another client can be booked into the same slot. This is much better that simply deleting the DNA appointment to make room in the diary for the new slot, as you keep a permanent record that the client did not attend – if they fail to attend regularly you may wish to take further action. The list of RFNA entries is one of the PPS Look up tables and can be set up from the PPS Menu: Tools – Look up Tables, and select the "Reason for Non-Attendance" entry from the "Appointments Diary Tables" section.

Room

See: Treatment Room

S

Salutation

In PPS, this is how you refer to someone in a letter. This applies to Clients and Third-Party contacts. You can enter the salutation on the Main Client Details screen for each of your clients – some clients you may prefer to use their title and surname and others that you know better you may use their first name. The same applies to Third-Party contacts where an individual's name is used (instead of just a Company name). You can use "Salutation" as a "merge field" when setting up or sending letters. There is a Salutation field available for Clients, and one for each Third-Party contact types (insurance companies, clubs, etc.) When a letter is printed using the Salutation merge field, the field is replaced with the Salutation entry, if no entry is made into the Salutation field, then the Client Title and Surname is used to replace the merge field.

Save

PPS Uses a <Save> button on many screens. This will save the updates that you have made to this screen and store them permanently in your database. One some screens the <Save> button will also close the screen.

Scheduling

See: Appointments Diary – Setting Up

Search

You can search for various records in PPS: Clients, Appointments, Third-Party contacts etc. Some screens include a <Search> button on the toolbar. The main PPS Client Search screen includes options to search on a variety of fields: for example Surname. This screen can be accessed from the Search Button on any of the client screens (main details, log, browse) or by clicking "Search" on the PPS Task Bar. The Search screen allows you to enter all or part of a value into a selected field, then when you press Enter a list of results that match what you have typed in is displayed. The most common information to search on is Surname. In the Surname field on the search screen, it is possible to enter all or part of the surname followed by a space, then all or part of the client's First Name. This way you can narrow down your search results – useful with popular surnames. For example, you can search for Joe Smith simply by entering SMI J in the Surname field and pressing enter. All clients whose surname starts with SMI and whose First Name starts with J will be listed.

You can search for existing Client Appointments or Free Appointment Slots using the <Search> button on the Appointments Diary – *see: Appointments Diary – Search* for more details.

Security

See: Access Control

Select

A term used when you choose something on the screen. Some PPS screens have a <Select> button, this normally means that you pick an option, or entry in a list, then click the <Select> button. This will "select" your chosen entry and proceed to the next screen, or return to the previous screen with your chosen entry selected.

Send a Letter

See: Letter

Send a Message

See: Message

Send an E-Mail

See: E-Mail

Set Up

See: Medical History – Setting Up; PPS – Setting Up; Custom Form – Maintenance; Users – Setting Up; Letterhead – Set Up

Show On Client Log

See: Client – Show on Client Log

Sign Off

See: Clinical Notes - Sign Off; Custom Forms – Sign Off

Slot Description

Each of your "blocks" of free appointments is organised into "slots". Each slot can have a description that can appear on the diary – such as "New Patients". To set up your list of Slot Descriptions, select from the PPS Menu: Tools – Look up Tables, and select Slot Descriptions from the Appointments Diary Tables section. Each of your Slots Descriptions can have a colour assigned to it to make the slot description heading more visible in the diary. To assign Slot Descriptions to your appointment slots, *see: Appointments Diary – Setting Up*.

SMS Message
PPS has the option to send an SMS message (or schedule one to be sent) as part of the PPS Activities system. SMS Messages are sent either by directly posting the message to an internet web site, or by sending a specially formatted e-mail to a preconfigured e-mail account; the provider of this e-mail account simply converts your e-mail message into an SMS message and sends it to the required recipient's mobile phone. This facility requires that you have an account with a third-party SMS messaging provider – this option is available on the Tools menu in PPS. There is a small charge per message sent (the charge is similar or less than sending an SMS from your phone).

SOAP Notes
You can use the S.O.A.P. standard of note taking in PPS if required. SOAP is an acronym for Subjective, Objective, Assessment and Plan, and is a method of organising your notes in a constructive way. The various "notes" headings that you can configure on the PPS Consultation screen allow you to record your notes using this method if you want to. *See: Options – Clinical Notes* for more details.

Source of Introduction
This is one of the PPS Look up Tables. It is entered on the Main Client Details screen. It is a list of the various ways that a client was introduced to your Practice. You do not have to enter this information if you do not want to. The source of introduction can be used to breakdown various reports by, and provides a useful measure of where your business comes from. You can set up your list of different sources of introduction by selecting from the PPS Menu: Tools – Look up Tables, and selecting "source of introduction" from the Client Tables section. PPS also uses a "Referral Source" entry as part of recording your clinical notes. This may be the same as source of introduction for a client's first visit, but may not be the same on subsequent visits. It is best to retain Source of Introduction on the main client details screen as where your client "first" heard about your practice.

Split Billing
See: Accounts – Invoices – Split Billing

Standard Charges & Stock Items
You can set up all your standard charges and stock items in a list, so that when creating charges, you can quickly select the correct charge item from the list. You can also assign codes to each item, so that you can quickly select an item via its code. Your standard charges are the different consultation fees that you charge, you may have a range of fees for different purposes such as an initial consultation, a follow up session, a full insurance assessment, etc. in addition, stock items are sundry items that you may sell in addition to the consultation services you provide. To set up your standard charges and stock items, select from the PPS Menu: Tools – Look up Tables, then select "Standard Charges and Stock Items" from the "Accounts" section. This shows you a list of your current items; you can use the <New> button to add a new item to the list. Once you have items in your list, then these can be selected from the list when creating charges. If you assign a "Code" to each item, then you can quickly select each item using the code when creating a charge.

Standard Letters
You can set up Standard Letters in PPS that can be used when writing letters to either a client, or a third-party. These letters are like "templates". They can include a combination of standard text, and merge fields. PPS includes its own proprietary simple Word Processor that you can use to print your letters, alternatively you can use Microsoft® Word directly from within PPS to produce your letters. A Standard letter can therefore be either a PPS letter, or a Word letter. Standard letters can be used for a variety of purposes. You can set up basic templates to use for referral, or discharge letters; these can contain the majority of the text required for the letter and you simply "fill in the blanks" each time to send this letter, or you can include optional whole sentences or paragraphs that you simply "delete as appropriate" each time you send the letter. To set up Standard Letters, select from the PPS Menu: Tools – Standard Letters, then either select an existing Standard Letter from the list and click <Modify>, or click <New> to add a new one. The Standard Letters screen allows you to either set up or select an existing Word Document as your letter, or to simply type in your text and use the PPS letter editor to send your letter. If you do not have Microsoft® Word, then use the PPS letter editor. When you have completed your letter text, make sure that you have entered a Name for the letter – this will be how you refer to the letter when selecting from a list of standard letters. You can also select to automatically be prompted to "follow this letter up" with either another letter, or a telephone call. This mean that each time you select to send this letter, you are prompted to schedule a follow-up activity. This can be useful if you want to keep track of your marketing activity and you have sent a letter to a selection of clients, PPS will schedule the telephone call for you to make to each of these clients for, say, two weeks time. You are then prompted in two weeks to process the telephone calls; as these have now become activities now due.

State
See: County

Statement Layout Designer
This is the template that is used when you select to print a Statement of Account from the PPS Accounts screen. You can change the basic layout of the statement to use your own preferred fonts, and include your own practice logo if required. You will need to be careful of the type of changes that you make to the layout, as incorrect changes to the layout can cause statement printing to fail. In this case you may have to revert back to the original layout and try making your changes again. To change the Statement of Account layout, select from the PPS Menu: Tools – Statement Layout Designer. You can either select to modify the layout, or revert to the default layout. There is another option on the PPS Tools menu – Set up PPS Letterhead. This option can be used to enter your practice name/address/contact details without the need to change the Statement layout using the layout designer.

Statement of Account
See: Accounts – Statement of Account

Statistics
See: Statistics & Summaries; Reports – Statistics Reports

Statistics & Summaries
This is a special Summary Report generator that can be used to generate Statistics Graphs. This option is dependant upon you having MS Graph installed – MS Graph is supplied as part of Microsoft Excel (and some other Microsoft packages). You can access the Statistics & Summaries screen from the PPS Menu: Reports – Statistics & Summaries. This screen allows you to prepare your own range of graphs for a variety of selections. You can add as many graphs as you want and update these regularly using a "re-calculate" button. You can also print out the graphs if required, or copy and paste them into your own spreadsheet. The Statistics & Summaries screen has 4 steps for you to select. Step 1 is the different statistics categories you can select from, you can select combinations of these, but some graph types are better displayed if you only select one or two. In a bar chart, what you select here will be the different series of bars and is known as the value axis (Y). Step 2 allows you to break down your results by various categories. In a bar chart this will be the bands along the bottom of the chart and is known as the category axis (X). Step 3 allows you to restrict which records are included in the results, for example just Male clients, or clients for a selected Practitioner only. Step 4 allows you to enter a date range. This again restricts which records are included in the results to just those that match the date range. When you have made your

selections in steps 1-4, you can either update the existing chart, or insert a new one using the buttons towards the bottom right of the screen.

Status
See: Client Status

Stock Control
PPS Includes a simple form of stock control. You can select that any of your list of standard charges is a stock item, and enter a stock amount, minimum quantity, re-order quantity and supplier. Each time a charge is created for a stock item, the stock is reduced by the quantity created with the charge. PPS does not automatically alert you when stock levels are low - you can however run a stock levels report to give an indication of current stock levels. The report can be produced just for those stock items that are now at or below minimum level. To set up stock items, *see: Standard Charges and Stock Items*. To run the Stock Levels Report, *see: Stock Levels Report*.

Stock Levels Report
This report allows you to produce a list of your stock items. You can select to run the report only for those stock items that are "below or at" the minimum stock level, or those items which are above minimum level. You can also select to break down the results of the report by a selection of fields such as supplier. To run the stock levels report, select from the PPS Menu: Reports – PPS Reports and Mail Merge, and select "Stock Levels Report" from the "Accounts" reports selection.

Summaries
See: Statistics & Summaries

Summary - Consultation
See: Clinical Notes Summary

Summary/Detail
See: Report Output

Suppliers
PPS Expense is an additional PPS Module that allows you to record details of practice expenditure. As part of these records, you can also set up your list of suppliers. Suppliers are also optionally used when setting up your standard Stock Items. To set up your list of suppliers, you can either enter a new supplier as you are entering a new expense record for a supplier you have not used before, or you can set up suppliers by selecting from the PPS Menu: Tools – Look up Tables, and selecting "Supplier" from the Accounts Tables section.

Surname
See: Client - Surname

Sync
See: PPS Sync

System Administrator
The System Administrator in PPS is the "prime" user – normally the first user who installed the software – and is responsible for setting up each of the other required PPS Users, including setting up which parts of PPS each user has access to (*see: Access Control*). The system administrator automatically has full access to all parts of PPS, including clinical notes that have been "made private" by other practitioners. You should NEVER forget the Log In details for the system administrator, as you need these to be able to change the log in details for all your other PPS users. Keep the log in details stored somewhere safe in case you forget them!System Users
System Users are the individuals in your clinic. They are set up in PPS so that they can be identified as Practitioners, Diary Users and can each have their own Log In ID and Password to access PPS. Each System User can also be set up to enable access only to certain parts of PPS if required using the PPS Access Control system. System Users are set up by the PPS System Administrator – this is the prime user of PPS and the person responsible for setting up PPS and general system administration duties. To Set Up System Users, you must be logged in to PPS as the System Administrator. Once you are logged in as the system administrator, select from the PPS Menu: Tools – Set up System Users. This shows a list of current systems users (if you are not logged in as the system administrator, you will not see other users on this list apart from yourself). You can select to add a new user, or modify/delete users from the list. For more details, *see: Users – Setting Up; Access Control; System Administrator*.

T

Task Bar
The PPS Task Bar is a tool bar that is positioned down the left hand side of the main PPS screen. It contains a calendar that can be used to navigate the Diary and the Daily List, and has quick access to various parts of PPS via Icons, headings and Prompts that can be clicked with the mouse. If your screen resolution is too small, then the icons are removed and just the Headings and prompts remain. You can switch the task bar on and off by selecting from the PPS menu: View – Task Bar.

Task List
The task list is your personal "to-do" list. It includes activities which are due today, and can also show activities you have completed today. The task list can be access from the PPS Menu: Activities – Task List, or by pressing Alt-F12 on the keyboard. The task list can be resized and repositioned to a suitable place on the screen. The title bar of the task list includes a small "map pin" icon that you can click to keep the task bar on top of any other windows. You can also click on the Purple Tick in the column heading to include or exclude completed items from the list. To open a task list item, simply double click on the item. This will open the relevant activity screen, and allow you process, or complete the activity. You can double click on the first row in the list to add a new activity – this will be a "Personal Action" activity type. If you want to add another activity type such as letter, then add this in the normal way by selecting the relevant activity from the PPS Menu: Activities. Activities only appear on the task list if they are selected to do so. Each activity record, when created shows an "include on task list" option that must be selected. You can complete an activity on the task list quickly by clicking the "completed" column (the column with the purple tick heading).

Telephone Number
See: Client – Telephone Numbers

Text
This indicates a type of field or input. Text is normal characters that are entered via the keyboard including letters and numbers.

Text Messaging
See: SMS Message

Third-Party
See: Contacts (Third Party)

This Treatment
See: Clinical Notes Summary

Time
See: Activities – Time; Appointments – Time

Title
"Title" is a look up table that is used to select a client title, such as Mr, Mrs etc. You can set up your own entries in this table if required. Select from the PPS Menu: Tools – Look up Tables, and select "Title" from the Client Tables section. For

each entry, you can select (if appropriate) whether the title applies to Male or Female. This enables the Sex field on the main client details screen to be entered automatically when entering a new client.

Toolbar
Many screens in PPS have a toolbar. This is a selection of "buttons" that can be clicked to perform tasks specific to that screen, or used to launch other screens. Sometimes a toolbar button requires that you select something on the screen first before pressing the button – for example selecting an item from a list before pressing the <Delete> button to delete the selected item. Toolbar Buttons will normally have "tips" that show when the mouse is placed over the button, the tip can give a further indication of what the button does.

Tools Menu
Options on the Tools menu are listed alphabetically in this reference guide under each Section e.g. Look Up Tables

Treatment Category
This is a Look up Table that is used on the Treatment Episode details. The list can be used to help you categorise your treatments in order to make your clinical notes reports more meaningful. You can set up your list of treatment categories by selecting from the PPS Menu: Tools – Look up Tables, and selecting Treatment Categories from the Clinical Notes Tables section. You do not have to use the Treatment Category entry on your Treatment Episode details if you do not want to.

Treatment Episode
All clinical notes in PPS are stored within the framework of Treatment Episodes; each time you see a client, this is a Consultation – one or more Consultations form a Treatment Episode. This allows you to see a client several times within the same Treatment Episode. Depending upon the nature of your business, it may be the case that each time you see a client this is a separate treatment episode, so the episode is "Started" and "Completed" all within the same consultation. It is possible to undertake more than one treatment episode for a client at the same time. If a client is currently in a treatment episode when you start a new consultation, you can select to start a new treatment episode from the Consultation Screen. If a client has more than one current treatment episode, then when you start a consultation, you can select which treatment episode that this consultation is for. A Treatment Episode in PPS includes a range of details that you can enter to give you a wide range of options for your reporting and statistics analysis. In addition to the Start and End dates of an episode, you can also categorise your diagnosis, treatment, outcome and discharge details, as well as entering certain information about the presenting problem such as Acute/Chronic, Time Present, etc. This is designed to assist you with your follow up consultations, as these details are displayed at the top of the Consultation screen while you are entering your consultation notes.

Treatment Episode Reports
The Treatment Episode report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Clinical Notes Reports section". This report is a list of the Treatment Episodes you have created. You can select to include just current treatment episodes, or completed ones. You can also select to include a variety of Treatment Episode details on the report depending upon how much information you want to include on the printout. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required. See also: Treatment Episode Statistics.

Treatment Episode Statistics
The Treatment Episode Statistics report is available from the PPS Menu: Reports – PPS Reports and Mail Merge, then select the report from the "Clinical Notes Reports section". This report shows statistics based upon your treatment episodes including number of consultations, new episodes, completed episodes etc. As with all PPS Reports, a wide range of breakdown and criteria options is available to enable you to group the report results with subtotals, or to only include certain selected records in the report. You can also select to export the results of the report to a file, or use the results as the basis of a mail merge if required.

Treatment Notes Dictionary
PPS has two Notes Dictionaries for you to use as part of your clinical note taking: General Notes Dictionary and Treatment Notes Dictionary. These are lists of words, phrases or paragraphs of standard text that can be inserted into your consultation notes entries. You can use the General or Treatment notes dictionary from the Consultation screen notes fields. To access the dictionary from any of the six consultation notes fields, click the Right mouse button and Notes Dictionary from the list. This then shows the dictionary on the screen. You can switch between General Notes entries and Treatment Notes entries using the radio buttons along the top of the screen. The two lists are separate purely for you convenience, you only need to use one of the lists if you want. Add the entries to your notes by either double-clicking or right clicking.

Treatment Programme
See: Treatment Episode

Treatment Room
You can set up your PPS Appointments Diary if required to show Treatment Rooms. One of the Diary Display options allows you to view your diary columns by Treatment Room rather than Practitioner. If you would like to view the diary in this way, then you must first set up your Treatment Rooms. To do this, select from the PPS Menu: Tools – Look up Tables, and select "Treatment Rooms" from the "Appointments Diary Tables" section. Here you can add your treatment rooms, and assign a Short Code (used when printing the diary) and a Colour (used on the diary) to each room. You can also assign the order in which treatment rooms appear in the diary. You must always assign your free appointments (when setting up the diary) primarily to a practitioner – each appointment slot you set up however can also be assigned to a treatment room.

U

Undo
You can use the standard Windows Edit menu – Undo option to "undo" your typing whilst entering text into fields. The undo option is not available for reverting other actions such as adding new records, deleting records etc.

User Profiles
User Profiles describes information about each PPS user. This is any person who either needs to log in to PPS or is a practitioner in your clinic, or has a diary. For more details about User Profiles, *see: Users – Setting Up*.

Users – Setting Up
To set up PPS Users you must first be Logged In to PPS as the System Administrator. Select from the PPS Menu: Tools – Set up Systems Users. This shows a list of current users, Select a User from the list and click <Modify> or click <New> to add a new user. This shows the User Profile screen where you can enter details about the user. The screen has 5 main sections. Section 1 is the User's full name, their Title (can be used when sending letters or printing invoices etc.), discipline (this can be used as part of your report criteria which is useful if your clinic supports several disciplines), Register No. (can be used to print on invoices). Section 2 is used to determine if the user is

a Practitioner, and if they have an appointments diary – not all your users may be practitioners, nor have an appointments diary – a receptionist for example. You can also set up a commission rate that the practitioner receives. This commission rate can be superseded by entries in the Practitioner Commission Rates table (see: Commission). Section 3 sets up their log in ID and password, plus how often this user should be forced to change their password. Section 4 sets how often PPS automatically checks for messages/activities for this user when they are logged in. Section 5 controls the Access settings for the user. When you click the Access <Settings> button, the access settings screen is displayed to allow you to select which parts of PPS this user has access to.

V

Value
See: Report Wizard – Criteria

View Style
See: Appointments Diary – View Style

W

Week
See: Appointments Diary – Setting Up

Weekend
See: Reminders

Word
See: Microsoft® Word

Word Processor
See: Activities – Letters

Working Week
See: Appointments Diary – Setting Up

X

X-Ray
See: Charts

Y

Yearly Planner
See: Appointments Diary – Setting Up

Z

Zip Code
See: Client - Post Code