private practice software

Getting Started

Contents

Welcome to Private Practice Software

Welcome to Private Practice Software (PPS). We hope that you enjoy using this software, and the many benefits it will bring to your practice.

This guide is designed to help you get started. This includes installing the software, accessing PPS from your Windows™ Desktop, how to Log In to PPS, and a quick tour of the main features.

PPS also includes various other guides including "Setting up PPS" and "Essential Guides" as well as a full Reference guide. Once you are up and running with PPS, these guides are available from the Help menu in PPS. All PPS Help documentation (including this guide) is included with your PPS Installation, and is also available on the Knowledgebase by visiting www.rushcliff.com/hands.

This document is divided into sections for you to work through one step at a time. This will ensure that the software is properly installed on your computer, and that you can start using PPS straight away.

If you have a previous PPS demonstration version installed on your computer then please uninstall it prior to installing the software again. You will find the uninstall function in START->Control Panel.

Downloading/Installing PPS

To download and install your free version of the software, please follow the helpful steps below:

1. Visit http://www.rushcliff.com/ppsdemodownload.php and request your access code.
2. Once you have received your access code email, you are free to start the download of PPS.
3. After this has downloaded, click to launch the installer:

1. Installing PPS on a Single Computer

1. If you are installing PPS onto a single computer use the normal PPS Installation.
2. This will launch the software installation. Select the location where you want to install PPS, and the PPS database. (The default is C:\PPSv4.0)
3. Once the installation is complete, there will be a PPS Icon on your Windows Desktop, and a new PPS option on the Windows Start Menu.

### 2. Installing PPS on a Small Network of computers

1. If you are installing PPS onto a small network, you will need to install PPS onto each PC that requires access to PPS.
2. First decide which of your computers will be the *main* PPS computer – this will normally be the one that perhaps will be used most for PPS. Please remember that this computer will need to be switched on when using PPS from any other computers on your network.
4. You must install PPS onto the main computer first. To do this, follow the instructions as if you were installing PPS onto a single computer by following Option 1 above.
5. Now you need to install PPS on the network computers.
6. Select the **Additional Network Licence** option from the main download webpage.
7. When you first access PPS from the network computer, you will need to "locate the PPS database". Follow the instructions on screen to do this. You will find a small ? Help icon on the screen that you can use if you are unsure what to do.

Registering Your Free Copy

Now that PPS is installed on your computer, you will need to launch it from your Start menu. It will then prompt you with the box below:

Here you have the option to either login to our demonstration version of PPS or to register a free copy of the software. The latter will give you a live system limited to 100 patient records prior to purchase.

To start using PPS as your live database, you will need to register as a new system. When you open PPS, choose the 'Register' button.
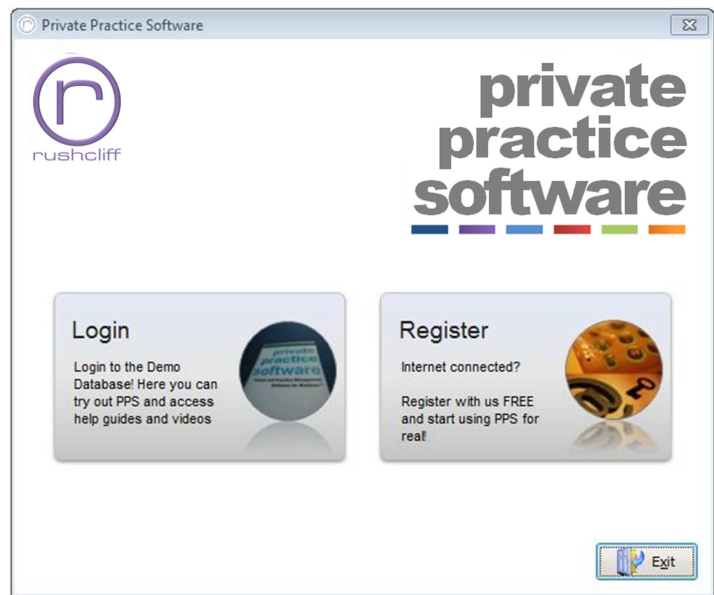
To complete the registration, follow the steps as prompted on screen. It is essential that you have an internet connection at this stage.

You will now be ready to activate PPS – hit the Register Now! button. This will issue you with a system registration number.

Please read on and we will take you on a quick tour of the main features in PPS.
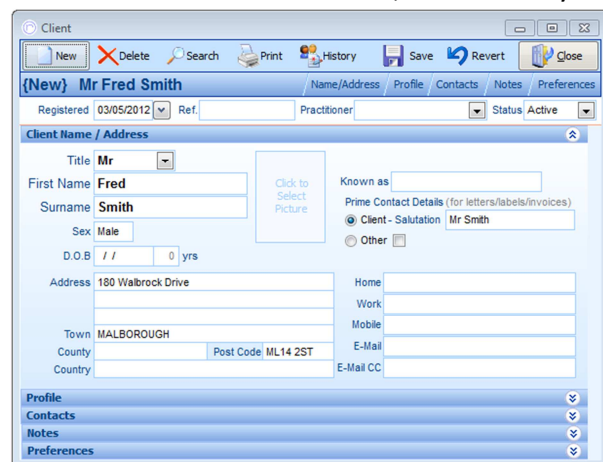
A Quick Tour of PPS

When you first access PPS, the main PPS background screen is displayed including the PPS Task Bar and PPS Help Assistant. The PPS Task Bar gives you quick access to the common functions within PPS. The Help Assistant will guide you through the demonstration database and contains links to various online demonstration videos. It also contains a link to the PPS Set Up guide. Both these functions can be accessed via the Help option at the top of the screen.

PPS is divided into several key areas, represented by the different menu and task bar options. These are Client, Consultation, Accounts, Appointments, and Activities. Each of these areas has its own screen (or selection of screens) designed to suit each purpose. If you want to add a new client, you use the Client screen, if you want to book an appointment, use the Appointments diary screen, and so on.

Client Details

To start with we will take a look at the main Client Details screen. With the mouse, either select the "Client" menu option, and then select "Main Client Details", or click on the "Client Details" option on the task bar. This will show the main client details screen, immediately followed by the Client Search screen. The Search screen is a very commonly used screen in PPS, as during any normal day's use, you will be referring to many different clients.

There is an example client in the database called Mr Fred Smith. Enter the surname of SMITH in the surname field and press enter, you will see that Fred is listed in the search results; highlight this line with the mouse and then press the <Select> button. This will return to the main client details screen with Fred Smith's details displayed.

You also use this screen to enter new clients – you can either click on the <New> button on the Tool Bar along the top of the screen, or if you have tried searching for a client using the search screen and decided that the client you are searching for is not in the database, you can use the <New> button on the search screen instead. This then displays a *blank* client details screen where you can enter all the details as appropriate about your client before pressing the <Save> button on the Tool Bar to save the details you have entered.

The Client Details screen for Mr Fred Smith shows a range of details including name, address, contact details, and a variety of other important information about this client that we either use for reporting purposes (such as Source of Introduction) or to assist with our

general use of Mr Smith's details as a client. You can set up your own profile of details on this screen to suit the way that you work.

You can also assign various third-parties to Mr Smith's details such as Insurance Companies, or Doctors (GPs or Consultants). We can use these details either for billing purposes, or to write letters to.

You can also record a Medical history (case history) for each client. This is a custom questionnaire that you set up, and can be included as part of the new client registration process.

Appointments Diary

The Appointments Diary is one of the key main areas of PPS, if you choose to use the Appointments Diary in PPS rather than using a traditional "paper" diary, then you can set up the diary to exactly suit the way that you work, including a variety of display options. In day-to-day use, you can quickly access all other areas of PPS including Client Details, Accounts, Letters, etc.
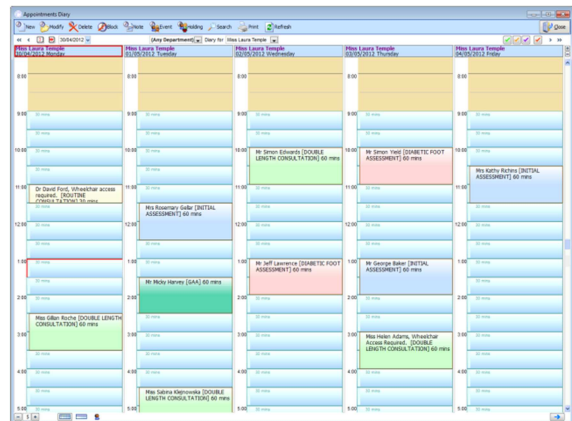
Let's have a look at the PPS Appointments Diary. With the mouse, either select the "Appointments" menu option, and then select "Appointments Diary", or click on the "Diary" option on the task bar. This will show the appointments diary for today.

This example shown here is a diary for Laura Temple for one day. Notice that the appointments are displayed in a variety of colours depending upon the status and type of the appointment. If you double-click with the mouse on a free appointment slot, you can add a new appointment. The New Appointment screen allows you to search for a client – enter SMITH in the surname entry and press Enter. This will show the Search screen (as before) and allow you to select Mr Fred Smith from the list. When you select Mr Smith, you will immediately see that Mr Smith's appointment is displayed in the diary. Adding appointments is as easy as that!

Now that we have entered Mr Smith's Appointment, we can highlight the appointment, and access any other part of PPS for Mr Smith, for example send Mr Smith (or his doctor) a

letter, create a charge, record consultation notes, etc. by using the other options on the PPS Menu or the Task Bar. When Mr Smith arrives for his appointment, you can also mark him as "arrived", or "completed" in the diary. To do this, simply highlight the appointment with the mouse, and use the Green or Purple button on the diary (towards the top of the screen).

When you use the Purple button, this gives you the chance to quickly raise a charge for the appointment, record a payment, and book another appointment or schedule a future reminder. This is a good quick demonstration on how the various parts of PPS all interact with each other: from the diary we have very quickly used the Accounts and Activities systems in PPS with just the click of a button!

Accounts and Billing

PPS allows you manage your practice revenue by raising invoices and recording payments received. There are many flexible ways of using PPS to keep your accounts records up-to-date; some of these are very quick and easy, as with the previous appointments example.

The basic Principles of accounts in PPS is that each time we see a client we create a "charge", this charge is then turned into an "invoice", which is then paid off by recording a "payment". You have complete flexibility within PPS to include as many charges as you want per invoice and to record as many payments as you need to per invoice (or one payment per several invoices). In addition you also can invoice third-parties directly, if required, on behalf of your clients – you can also split invoices between third-parties and clients, design your own invoices and receipts, customise what to include on a printed invoice – PPS has a comprehensive range of accounts options!

 In the example of completing an appointment discussed in the previous section above, we can quickly create a charge for the appointment – *the charge may already be selected if the appointment that we selected has an appointment type that uses a standard charge code*.

We can select from the quick list of charges codes and descriptions – this is our standard list of goods and services that we charge for, you can set up your own items in this list. Select a charge from the list, then use one of the three buttons to either: Create the charge and invoice later – use this if you want to bill the client perhaps at the end of their treatment; Raise the invoice now but pay later – use this if they want to take the bill with them but are not paying now; Pay now – when you select this option, simply confirm the payment method and confirm if you want to print an invoice/receipt.

In another example we will see how easy another method of billing is. This example uses PPS Cash Desk which is a point-of-sale style screen that can be used to manage your billing. PPS Cash Desk can be called from anywhere in PPS by using the F11 key on the keyboard, or by selecting Cash Desk from the PPS Accounts menu, of the Task Bar. When you select one of the above, the Cash Desk screen is displayed.
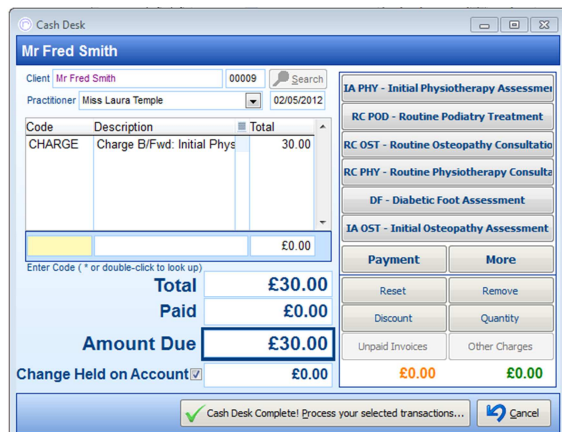
If you have highlighted Fred Smith's appointment before selecting Cash Desk then his details will already be displayed at the top of the screen. The *quick buttons* in the top right of the screen is a list of charges that we have selected to include on the Cash Desk screen – if you have more than six items, use the <More> button to display the next six item and so on. Clicking on a *quick button* will add the charge to the Cash Desk transaction list on the left. You can also enter a charge code in the Enter Code field if the charge is not available within the q*uick buttons* list. Add as many charges as you want to before pressing the <Payment> button. The *quick buttons* on the right will then change to display your common payment methods. Select the required payment method, and confirm the amount to be paid by simply pressing Enter. Then press the <Cash Desk Complete> button, and confirm if you wish to print or e-mail an invoice/receipt for the sale.

 In this example, with three or four clicks of the mouse you can produce all the necessary PPS accounts transactions and produce a receipt – this is an ideal way of managing all those clients at the reception desk waiting to pay for their treatment!

If you deal with 3rd parties including insurance companies and PCTs then it's even easier! As all you need to do at the end of each appointment is to raise a charge or charges. Then at the end of the month (or any time period) you can run the Invoice Processing option to create all the necessary invoices in one go. These can subsequently be sent or e-mailed to the relevant parties.

PPS also includes a central "Accounts" screen that can be used for clients, or third-parties to manage their account, check balances, record payments, print statements etc.

In our next stop on our quick tour of PPS, we will take a look at part of the PPS Activities system.

Sending E-Mails, Letters and SMS Messages

Whenever you use PPS to send an e-mail, letter or SMS message, you are using the part of PPS called the Activities System. There are variety of activity types including Letters, E-Mails, Personal Actions, and Telephone Calls. Each of these can be used to assist you in managing your daily tasks. Activities can be (but do not have to be) related to clients. All activities in PPS include a "due date and time" which means that when you select a new activity record, you can either complete the activity record now, or schedule it to be completed at some stage in the future.

The activities system in PPS includes auto-notification so that when a future scheduled activity becomes due, you will be automatically notified with a pop-up message on the screen, or a prompt when you log in.

To send an e-mail, you can select a client from the appointments diary (or while you are recording clinical notes, or viewing the client details, etc.) and simply click on the "Send an E-Mail" from the task bar. This shows the activity screen for an "E-Mail" type activity (each activity type has a similar style screen). Here you can select which E-Mail to send from your list of standard templates, and press the <Send> button.

You can either send E-Mails using basic text, or by using the HTML editor in PPS, which allows you to add images to your template.

Select from a list of standard templates. These templates can contain data merge fields as well as your own text which means that with some e-mails you can print or send them as letters without having to edit the document. Merge fields automatically insert information into the e-mail and include everything from client demographics, appointment details, 3rd party information and clinical notes.

These merge fields are especially useful when creating appointment confirmations, reminders and follow ups as they can all be automated. You can even configure PPS to work out the most appropriate way of contacting each client, either by letter, text, e-mail or a telephone call.

If you are using the PPS letter editor, you can simply type your letter and print it. You can set up the PPS letter layout to include your own letterhead and logo.
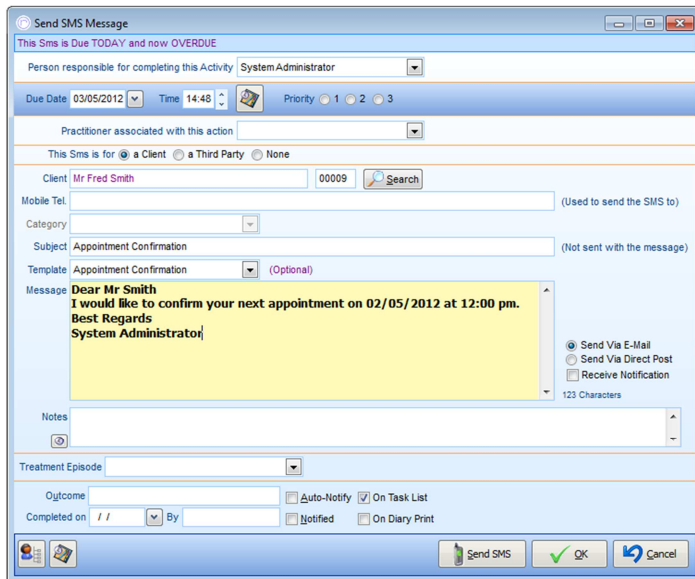
Once you have completed the activity, you can "complete" it. This is common to all PPS activities where completing the activity means that is it no longer due to be completed.

You can include any activity on your PPS Task List. The Task list (available from the Activities menu and the Task Bar) is your personal "to-do" list that shows your activities that are due today – and overdue! You can quickly process your activities directly from the task list and also mark them as completed.

PPS also includes an internal messaging system as part of the activities system. You can use this to send instant messages to other PPS users on your network. Messages pop-up automatically and you can quickly read them and reply to them if necessary. All PPS activities appear along with all other client records (appointments, accounts, clinical notes, etc.) on the PPS Client Log screen.

Client Log Screen

The Client Log is a comprehensive central point of information for each client. The screen includes a summary of all the client's personal details, important information from the main client details screen, plus a complete journal of all records you have created for the client.

You can highlight any of the records in the list to display the details of the record.

Clinical Notes

PPS Clinical Notes is a full Consultation and Treatment Episode management system. You can design your own clinical notes forms and include your own Charts and diagrams. You can also build your own clinical note-taking framework, by creating 'text sets' allowing you to write your notes without even using the keyboard!

To access your clinical notes simply highlight the relevant client in the appointments diary and click Consultation on the task bar. The Consultation screen shows a full history of your previous notes.

PPS allows you to manage your client's treatments by storing all your notes by Treatment Episode. PPS uses a central Consultation screen to allow you to record notes for your current consultation whilst also being able to review your notes for this treatment episode, or other previous treatment episodes on the same screen.

Full treatment episode management allows you to monitor and progress your treatments through to their completion. Your comprehensive treatment episode details also allow you to produce a wide range of statistics reports.

And Finally!

There are many areas of PPS that we have not covered in this quick tour, including a wide range of options to customise PPS to suit the way that you work.

Please spend as much time evaluating the software as you need to – there is no time limit on it, and you can log into the database at any time, even after you have registered PPS and are using the "Live" database. The only limit is that you can only add 100 records to each part of the system.

If you have any questions or wish to book a free 30 minute demonstration with our dedicated training team, then please do not hesitate to contact us on 0845 0680 777 or by e-mailing sales@rushcliff.com.

Purchasing PPS

To purchase PPS you can either call the Sales department on 0845 0680 777 or click the 'Purchase PPS' button when you are in your database. This will take you on a live link to our website where you can choose the different modules and add-ons for your PPS System.

Purchasing PPS will grant you a system with no limits to your patient records. You will be up and running with the "Live" version in no time.

Many thanks for reading this Getting Started Guide. We hope that you have found it informative and useful.

If there is any aspect of PPS you would like to discuss with us, then please do contact us:

Visit our web site: www.rushcliff.com

E-Mail us: sales@rushcliff.com

From the UK call us on local call rate: 0845 0680 777

From outside the UK, call us on: +44 1283 542729

Thank you,

From the PPS Team