# Using ‘PPM’ - Private Practice Manager Version 4

This document contains only basic information.
For full details of the system please refer to the User Guide

To open Private Practice Manager double click on the icon and enter the user name as ‘Admin’ and the password as ‘admin’. The password must be in lower case

At the Consultant Selector screen select the required consultant and click ‘Open Consultant’, or double click on the Consultant’s name

## Section 1

This section covers:

- Entering new patients
- Sending Letters and Medical Reports
- Invoicing for Consultations, Procedures and Medical Reports
- Entering appointments in the Diary and creating Clinic and Theatre lists

### Entering new patients and viewing patient records

Click on the Patient Screen button on the Main Menu screen

The most recently entered patient will be displayed. (Where no patients have been entered a blank patient record will be displayed.)

See below for information on how to complete this record.

(Please note that once a patient has been entered you will need to click the new button to add further patients)

The word processor for writing letters is accessed using the New Letter toolbar which will display when the Letter Button on the Patient Details screen is clicked (Medical report documents are created within the Medical Report screen)

The entry of Consultations, Procedures and Medical Reports and the creation of invoices are accessed from the Finances toolbar which will display when the Finances button on the Patient Details screen is clicked.

Appointments can be entered in the Diary which can be accessed from the Diary toolbar which will display when the Diary Button on the Patient Details screen is clicked

**The picture below shows where to access these and other functions**

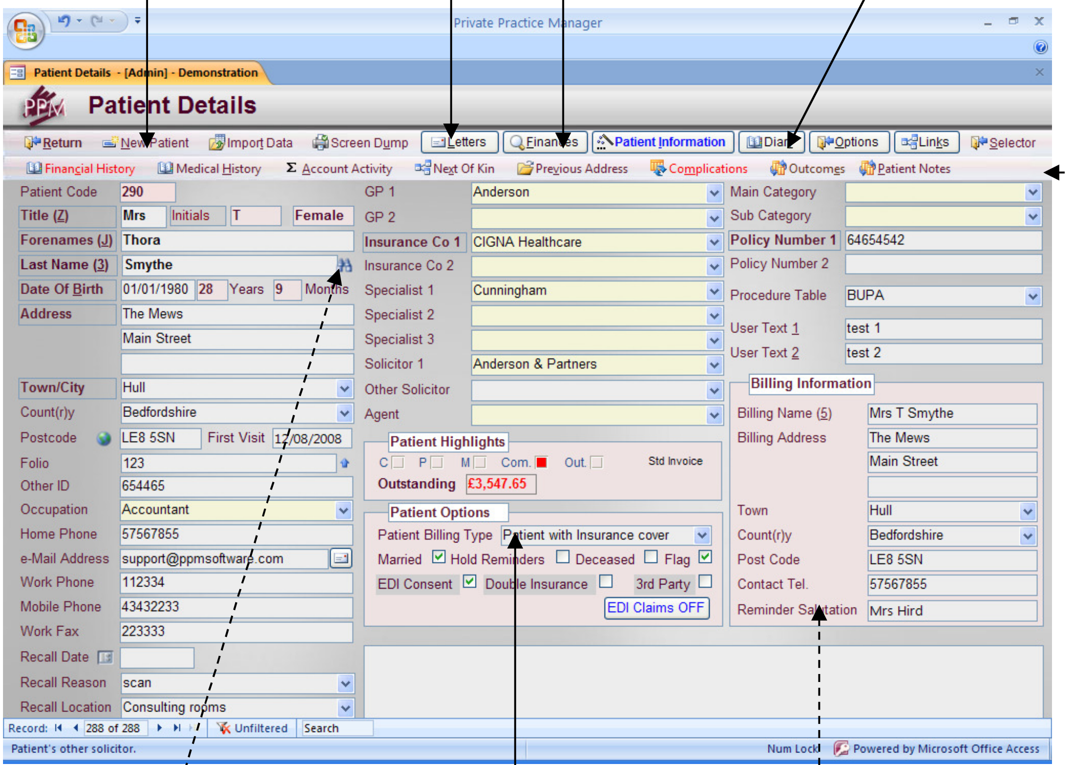
# ‘PPM’ – Private Practice Manager Primary Functions

**1 START HERE**
**Click this button to enter a new patient**

3
Click this button, which displays the Letters toolbar, to send a letter

4
Click this button, which displays the Finances toolbar, to raise invoices

5
Click this button, which displays the Diary toolbar, to enter a diary appointment




*
This toolbar changes when a button on the toolbar above is clicked

*
Search for an existing patient here

2
Select the billing type here

*
Billing name and address can be changed here

## 1. Entering a Patient

On this new record most of the buttons will be greyed out
The cursor will be flashing in the Title field

You should enter the title, forename and last name of the patient, using the Tab key, the Enter key or the mouse to move to the next field. Once the last name has been entered all of the buttons become active. (You may leave the title and forename fields blank although it is not good practice to do this)

You should enter the date of birth in the format dd/mm/yy or dd/mm/yyyy for patients born before 1930 (this being due to the Windows calendar settings)

You should enter the first line of the address and the town or city in the appropriate boxes
You may enter more information if required

**Enter GP**
To enter a GP type the last name of the GP in the box. Click the down arrow and select the correct GP with that last name (if there is more than one listed) by clicking on it with the left mouse button.
If the GP that you have entered is not already in the database they will not appear in the list. Click the return key and you will be prompted to add the GP. You should enter the information on the record screen as described in the PPM Quick Start document.

**Enter Insurance Company, Specialists, Solicitors and Agent**
This is done in the same way as for entering the GP

**Procedure table**
This is set by default to BUPA. You may select a different table from the list. You may also change the default table in the system setup

Please note that for evaluation purposes it is best leave the table set as BUPA as all of the Procedure fees for BUPA are preloaded

## 2. Billing Type

This is found in the Patient Options section of the screen

Click the down arrow and select in whose name you want the invoice to be raised.

Please note that if you then click return and you have selected to invoice to an address that has not been set up you will see a prompt to that effect
The system will take you to required field so that you may set up the data

**Other** allows you to enter a different Billing address for example to a Parent who is paying for their child.
If you select 'Other' a screen will appear asking if you wish to use the patient name and address, if you click yes this will be inserted in the appropriate fields you can then change the billing name to the appropriate person.

**Note – The system defaults to Patient with Insurance Cover unless you have changed it to Patient without cover.**

**You may visit the following screens in any order to access the functions shown**

## 3. Letters

Click the Letters button on the top toolbar to display the Letters toolbar

On the Letters toolbar click the New Letter button

A window will open in which you may choose the type of letter to send by clicking the down arrow to the right of the letter to box and clicking with the left mouse button on the letter required.

Once a letter type has been selected the New Letter and New Letter with Cc's buttons become active.

If you wish just to send a letter click the New Letter button

Word will open and the letter will be created with merge data included
This letter can be edited as a normal word document
You should enter the required text in the letter and print it.
To save the letter click the top 'x' on the right of the screen and respond yes at the prompt.
The letter will be saved
When writing long documents you may wish to click the save icon from time to time so that in the event of the machine crashing not all of the document would be lost.

**'Copy To' function**
If you wish to send a letter with Cc's click the button for New Letter with Cc's to open the screen below.

Using the Down arrow to the right of the 'Cc To' box select the recipient of the first Cc.
Click on the Second Cc tab to select the next Cc recipient. You may select up to 5 Cc's.
Selecting 'Other' allows you to manually enter the details for someone other than a listed person.

To generate the letter, click Return.

You should now enter the required text in the letter and print sufficient copies including the copies for the Cc's. Close the letter using the top 'x' and respond yes at the prompt to save the changes.

The Cc Cover letters will now be visible on the screen. They appear as one document with a separate page for each cover letter. Print one copy.

Close this document with the top 'x'. You will not be prompted to save changes as the covering letter is not stored.

**Please note that in Office 2007 a PPM toolbar can be installed.**

**This Toolbar includes an option to manually add cc addresses to the foot of any letter created from within PPM and may be used as an alternative to the above method**

## 3. Create an invoice

Click the Finances button on the top toolbar to display the Finances toolbar

## Consultation invoice

On the Finances toolbar click the Consultations button

A Consultations entry screen will be displayed

**The invoice may be created with minimum information as follows:**

### Step One (For systems set up with Departments only)

Select a department by clicking the down arrow and selecting from the list, or by typing in the Department name.

### Step Two

**Select the Consultation type** using one of the following methods:

- You can click the arrow to view a list from which you can select. Note that if the entry is for an EDI patient only consultation types with an industry standard code will be accepted. For non-EDI patients any consultation type may be used.
- You can type in the text and if the item is in the list it will appear, if it is not it will ask if you wish to add it. It will take you to the appropriate set up screen.

Once you have selected a consultation the appropriate fee will be entered in the consultation fee box automatically.

You may change the fee in the consultation fee box for a specific invoice. Click in the fee box and enter the new fee. This does not alter the default setting for that type of consultation.

### Step Three

**Enter the consultation date** by typing in the date or by using the pop up calendar

### Step Four

Tick the **batch** box

### Step Five

Click the **Invoice Now** button. You will be returned to the Patient Details screen and prompted to print marked invoices. Respond ‘Yes ‘at the prompt for the invoice to be displayed on the screen ready for printing

## Consultation Screen - additional features and functions

**The following information describes optional extra features and functions of the consultation screen**

**Departments**
If your system is set up for multiple departments a Departments box will be visible. You should enter the required department

**Diagnosis**
You may enter a **diagnosis** by typing in or selecting a code from the drop down list, which will automatically complete the diagnosis description box to the right.
You may instead type in a diagnosis in the box to the right of the code box.

**Diagnosis Code and Description**
If you wish to make a change to the description for the diagnosis description on this occasion only you should do the following
Enter the code. Position the cursor on the diagnosis description. Right click with the mouse
A prompt will be displayed asking if you wish to make a temporary change to the description
Click yes to open a temporary description change box

Type in the temporary description for the diagnosis and click ok. The description will be entered into the description box

**User Defined Diagnosis**
If you wish to enter a user-defined diagnosis right click on any of the diagnosis boxes to go to the user diagnosis entry screen.

**Notes**
**Anything typed into the Notes box will appear as text on the invoice**..

**Referred by, Referred to, Next action boxes**
These may be completed as required.
The referred by box is used to generate a referrals report.
You may wish to enter the name of the referring GP or other party here so that the referral report can report in individual GPs or other individuals.

**Quotation - Batch - Hold**
If you wish to generate an invoice for the consultation you should now click the batch box.
You may instead wish to hold the invoicing of this consultation until a later date or until further consultations or procedures are entered in which case you should click the hold box.
If you click the quotation box a quotation can be generated from the patient screen and the invoice held.
This is a useful tool to check whether the invoice is correct before going to print it

**Pre Authorisation**
This is a required box for EDI Claims. You should enter the patient's preauthorisation code in it.

**Interventions**
User defined interventions may be added to a consultation invoice for non-EDI patients.
For EDI patients you cannot enter an intervention here. You will be prompted to go to procedures to add one.
Click on the down arrow to enter one from the list or type in an intervention and respond yes at the prompt to add it to your list. You may vary the fee charged to a specific patient by changing it in the charge box to the right of the description box. The default fee is not changed.
**Interventions cannot be entered alone; they must be part of a consultation invoice.**

**New button**
This allows you to enter subsequent consultations for inclusion on the same invoice.
**Note that a record of each consultation remains on the screen until the invoice has been sent for printing.**

**History button**
Clicking on this button opens this window and lists the Consultation History.

**Billing Information button**
Opens a screen where the billing details can be changed

**Previous Dates\Diagnosis buttons**
Inserts data from a previous consultation invoice (This is only needed for EDI invoices)

**Screen Dump button**
Prints a copy of the screen

**Jump to Procedures button**
If you wish to enter a Procedure for this patient you may use the Jump to Procedures button to move directly to the Procedures screen.

If you have batched the Consultation invoice and then clicked the Jump to the Procedures button, you may enter a procedure and batch that.
Clicking the Invoice Now button will create one invoice with both Consultation and Procedure listed

## Procedure Invoice

On the Finances toolbar click the Procedures button

A procedure entry screen will be displayed

**The invoice may be created with minimum information as follows:**

### Step One (For systems set up with Departments only)

Select a department by clicking the down arrow and selecting from the list, or by typing in the Department name.

### Step Two

**Enter the Dates**

When you open the Procedure screen the cursor will be flashing in the admission date box.
All of the dates are set to the current date as default but may be changed by selection from the pop up calendar or by typing in the required date.

### Step Three

**Enter Procedure**

To enter a procedure you can key in part or all of the Procedure code
If you key in all of the code and click enter the description and amount will appear.

If you key in part of the code and click enter the system will search for the first code beginning with what you have typed in. If you then press the down arrow all codes after the one typed in will be listed for you to scroll down and select from. Do this by clicking on the required code with the left mouse button.

If you do not know the code you can key in text such as Hip or Hernia in the CODE field and click 'Enter'
If you do so the system will say the 'XXX' is not in the list. 'Do you wish to search for a similar entry?'

Click 'Yes' to open the 'Search Procedures' screen.

Select the procedure you want and click return, or double click in the grey box to the left of the required procedure. The procedure will now be displayed in the appropriate boxes.

### Step Four

Tick the **batch** box

### Step Five

Click the **Invoice Now** button. You will be returned to the Patient Details screen and prompted to print marked invoices. Respond 'Yes 'at the prompt for the invoice to be displayed on the screen ready for printing

## Procedure Screen - additional features and functions

**The following information describes extra functions and features of the Procedure Screen**

**Entering Data in the Upper Part of the screen**
Entering additional data can be accomplished in various ways as follows.

- You can click the arrow to view a list from which you can select.
- You can type in the text and if the item is in the list it will appear, if it is not it will ask if you wish to add it. It will take you to the appropriate set up screen.
- You can right click in the box, which will take you to the entry screen to add the item to the database.
- The service code options are only used for EDI patients. In the case of an EDI patient you must select Surgeon's Fee for Theatre. In addition, clicking with the right mouse button, or clicking F12 when in the service codes box opens a service code screen where the codes selected for the drop down list can be changed.

**Specialist /Anaesthetist**
If the system has been set to 'Hospital' in the system set up there is a box where the name of the specialist can be entered. If the system has been set to Consultant in the system set up the Anaesthetist will appear as the box title rather than Specialist

**Departments**
If your system is set up for multiple departments a Departments box will be visible. You should enter the required department

**Diagnosis Code and Description**
You should enter the diagnosis by typing in the required code or selecting from the list Description changes work as for Consultation above

**Quotation – Batch - Hold**
See Consultation above

**Multiple Procedures**
If a second or third procedure was performed repeat the process of entering a procedure. You can enter the procedures in any order and the system will work out which is the most expensive and calculate the total fee accordingly.
You can enter procedures, accommodation charges and service code charges on the same procedure screen. After entering the code for one type, click the button for another type of entry and enter the item in the normal way

**Service Codes**
If you wish to enter a fees for services provided in addition to the surgeon's fee for the procedure, click on the Service Codes button next to the Procedure Codes button.
Now select the required service from the drop down list in the same way as you selected the procedure. You may need to enter a fee for any entry made as a service code .entry; however default fees can be set up

**Accommodation Codes**
In order to enter Accommodation codes, first set up the codes, descriptions and fees using the Accommodation codes screen in the Setup and Maintenance menu

Set the admission and discharge dates
Click the Accommodation Codes button
Enter the required Accommodation code. The notes box will be completed automatically to show the number of nights stay, the cost per night and the date of the first night's stay.
The total charge will be calculated and entered.
You may now add a procedure or service code item on the same screen
To do this click the Procedure Code or Service Code button and enter the codes in the normal way

**Amending an Entry**
If you have entered the wrong code and wish to change it, highlight the code and carry out the options above.
If you wish to edit a procedure description - enter the code and bring up the description.
To edit the record **permanently** Right click in the code box. The will take you to the Procedure Code Screen in the Setup & Maintenance section. Amend as required and click return.

**Temporary Description changes**
If you wish to make a change to the description for this procedure entry on this occasion only you should do the following.
Enter the code. Position the cursor on the procedure description. Right click with the mouse
A prompt will be displayed asking if you wish to make a temporary change to the description
Click yes to open a temporary description box

Type in the temporary description for the procedure and click ok. The description will be entered into the description box

**Procedure fees**
If you wish to change the fee for a procedure, highlight the fee and change it to the required value and then press the Enter key. Click yes at the prompt

Note that this change is effective for this entry only and does not change the default fee stored for this procedure.

**Notes box**
If you wish to add to the description you should type in text in the notes box to the right of the fee box. **The text will appear on the invoice**. The default description will not be affected.

**Deleting an entry**
To delete a procedure code and description from the current procedure entry click in the blue box to the left of the entry and press the delete key on the keyboard.

**Procedure Table**
If the procedure table has been set to a company other than BUPA and you have not set up a fee for this particular procedure, when you press return after entering the code the amount will remain as zero.
In this event right click in the Code field and this will take you to the Procedure set up screen. Enter the amount in the appropriate box and click return. This will take you back to the Procedure screen.

The procedure table may be changed by clicking the down arrow to the right of the table box and selecting a different table.

**Please note that if procedures have already been entered they will need to be reselected in order for the new fees to appear. Do this by clicking the down arrow to the right of the procedure description box and clicking on the description. The fee for that description will also be displayed in the drop down list**

**History button**
If this button is clicked a table of procedures carried out on this patient is displayed.

**Billing Information button**
Opens a screen where the billing details can be changed

**Previous Dates\Diagnosis buttons**
Inserts data from a previous consultation invoice (This is only needed for EDI invoices)

**Screen Dump button**
Prints a copy of the screen

**Jump to Consultations Button**
If you wish to enter a Consultation for this patient you may use the Jump to Consultations button to move directly to the Consultation screen.

If you have batched the Procedure invoice and then clicked the Consultations button, you may enter a consultation and batch that.
Clicking the Invoice Now button will create one invoice with both Consultation and Procedure listed

## Batch Invoicing

Rather than displaying and printing invoices singly as described above; it is possible to display and then print all of the invoices entered, for example for a clinic list, in one operation.

To do this:

- Do not use the invoice now button for each invoice, use the Return button instead
- Click ‘No’ at the Invoice Now prompt, which appears on returning to the Patient screen
- Click the Return button on the Patient Details Screen after entering all required Consultations and Procedures for all patients
- From the Main Menu click the Invoicing and Credit Control button
- Click the Create Marked Patient Invoices
- At the prompt click yes
- The invoices will be displayed as a series of pages ready to be printed
- Medical report invoices cam be processed in the same way using the Print Marked button in the Medical Report section

## Create a Medical Report Invoice

On the Finances toolbar click the Medico-Legal button

Click yes to add a Medical report
At the prompt accept the Reference number provided (You may read the prompt for other options)
The medical report screen will be displayed

**A Medical Report invoice may be created with minimum information as follows:**

### Step One (For systems set up with Departments only)

Select a department by clicking the down arrow and selecting from the list, or by typing in the Department name.

### Step Two

Enter the **Requestors Reference Number**

### Step Three

**Enter a Charge Description** by typing in or selecting from the drop down list.

The report charge is entered automatically but may be altered. Click on the charge and enter the new amount if required.

### Step Four

**Enter Dates**

All of the **Dates** should be completed to give as full a record as possible.
However you are not required by the program to complete the dates so you may proceed without them if you wish. Please note that the charge date is the date printed against the item on the invoice

### Step Five

**Select who to invoice**

Using the **Requestor** tab select the required company by clicking the down arrow and selecting from the list. This will insert the details as entered in the Patient Details screen.

Click the **Refs Etc**. tab to set the costs according to the buttons on the screen.
Report charges may be split between several requestors
See the detailed information below

### Step Six

Tick the **batch** box

### Step Seven

Click the **Invoice Report Now** button and follow the prompts

## Medical report screen – Additional features and functions

**Departments**
If your system is set up for multiple departments a Departments box will be visible. You should enter the required department

**Diagnosis**
You may enter a user defined **Diagnosis** by selecting from the list of codes present or by adding a new one

**Diagnosis Description.**
You may also enter a Diagnosis Description.
If the entry you type is not in the list you will be prompted to add one.

**Notes Box**
A **Notes** box is provided, click in it and type as required. **These notes will appear on the invoice.**

**Requestors and Charges**
Using the Requestor, Second Requestor and Other Party tabs select the required companies by clicking the down arrow and selecting from the list. This will insert the details as entered in the Other Patient Data Screen.
You may manually enter details of a party other than those appearing on the other Patient Data screen by selecting 'Other' from the drop down list on any of the three tabs and typing in the details in the boxes below.

Click the Refs Etc. tab to display the window.

You should enter the reference numbers of the second requestor and other party here.
You may divide the costs according to the buttons on the screen.
Alternatively you may enter a fee in the charge boxes as required.

Click in the box and enter the fee. Note that the sum of the charges must add up to the total of the report charge as it appears in the top half of the screen.
Click batch.

**Invoice this Report.**
You may generate an invoice directly from this screen by clicking the Invoice this Report button.
Separate invoices will be created for all of the requestors against whom a charge has been made.
Once invoiced the record remains visible as a permanent copy but is 'greyed out' Subsequent invoiced medical reports are stored in the same way and can be accessed using the record bar at the bottom of the report screen.

Medical report invoices may also be printed in bulk. See also the Batch Invoicing notes above.

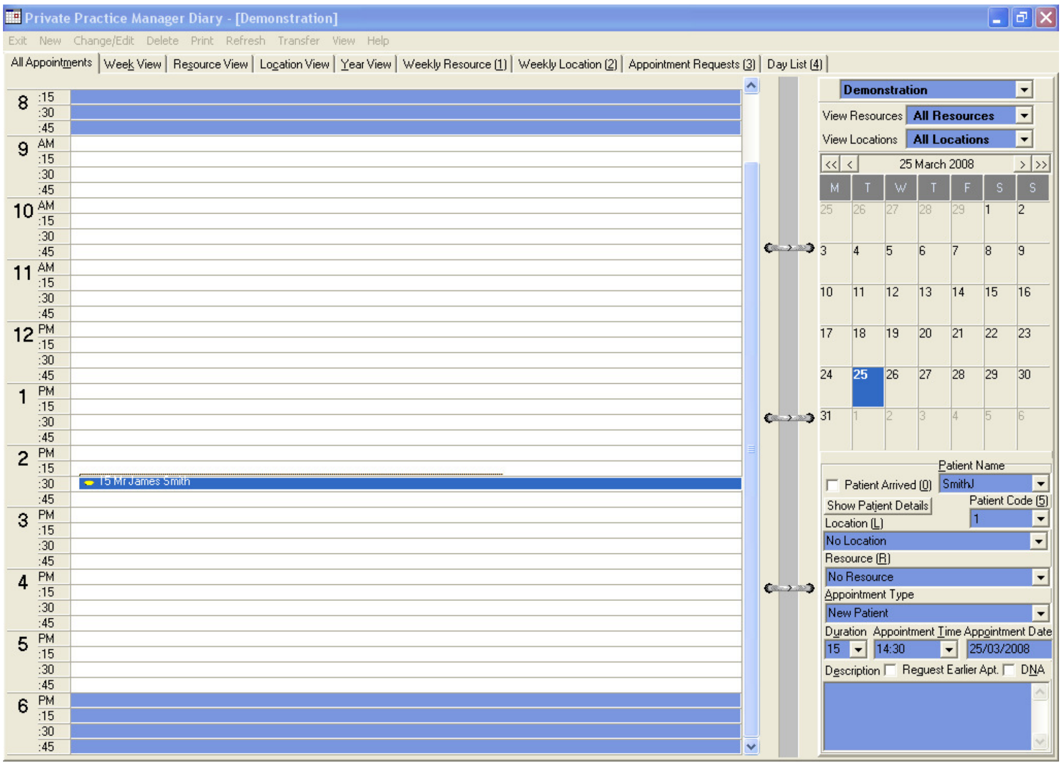
**New Letter/Report button**
Works the same as for sending a letter, see above

# 4. Diary

The diary runs alongside the main PPM program and can therefore be accessed at the same time as an open data set or without opening a dataset at all. The diary can be minimised at any time to access an open dataset.

**Opening the Diary**

The diary can be opened from the Consultant Selector screen or the Patient Screen (where it will open directly to the Graphical version of the diary) or through a consultant data set where it will open to the diary menu screen. Click on the graphical version of the diary to display the diary screen as shown below




**Display**

Please note that the display on the right hand page may be slightly different depending on the screen resolution of your computer

If your computer is set to a screen resolution of 800 x 600 the appointment details box will appear as wide as the calendar above it.

**Entering appointments**

Select the correct diary (if you have more than one) using the box at the top of the right hand page

Select the appointment date using the calendar

To enter an appointment left click on the appointment slot and then either right click on the appointment  time or click new at the top of the screen

A blank New Patient appointment will be entered and identified with a yellow marker

Use the box in the bottom right corner of the diary to enter the details of the appointment

If the patient details are being added after the appointment slot has been selected, minimise the diary and add the details. Maximise the diary again and click refresh at the top of the screen. The newly entered patient can now be entered from the list

The boxes below the patient name can be completed either by selecting from the drop down list or by typing in the required entry.

Please note that you need to move on from each box before the contents of the box are added to the appointment details on the left of the screen. (To move on from the description box which is the last one used when entering an appointment either click the refresh button or move on to add the next appointment)

**Entering non-patient appointments**
Enter a blank appointment as above but do not select a patient (or select the Unknown patient from the top of the list)

Use the description box to enter text relating to the appointment

**Changing appointment duration time and date**
This can be done by dragging and dropping within a day to change duration and start time or by dragging and dropping to a different day of the same month by dragging on to the calendar. The same may be done within the week view screen

**All drag and drop functions should be used with care as you may be changing more of the parameters than you intend**

To enter details manually the boxes in the appointment details on the right of the screen may be changed.
To enter a different date all that needs to be typed is e.g.28/8 and 28/08/2003 will be inserted

If an appointment is changed in this way the diary will follow the appointment to confirm that it has moved.

Please note that changes of date and time require you to Ok the changes at a prompt before the changes are effective

**Viewing address and telephone numbers**
Click on the appointment for the required patient
Click on the Show Patient Details button (located under the patient name) to view address and telephone numbers

**Deleting appointments**
An appointment may be deleted by left clicking on the chosen appointment to select it and clicking the delete button at the top of the screen

**Views**
There are several different views which are accessed by clicking the appropriate tab at the top of the screen.

As described above ‘drag and drop’ may be used to change appoint day time and duration in the week view.

Drag and drop may also be used to change resource or location when in the resource or location view

When in the year view click on the first day of any month and any days during that month where appointments are present will display in bold. Double click on the day to display the diary for that day on the screen.

## Clinic List

To generate a clinic list first enter the appointments in the diary for the appropriate days and times.
It is necessary to select an appointment type as New Patient, Follow up or Recall for each appointment as this is how the system recognises that an appointment is to be part of a Clinic List.
User defined entries prefixed with New Patient, Recall or Follow up may also be used
Click Return on the Diary screen to return to the Diary menu screen.
Now click the Clinic List button to open the screen

Using the options on this screen first select the date or date range either by typing in the dates or by clicking on the Calendar and selecting the date or dates from there.
You may choose how you wish the appointments to be listed how you wish the clinic appointments to be listed, for example by Location, by clicking the appropriate 'List by' button.
You may choose what information is displayed on the clinic list by using the tick boxes below the 'List by' box.
Click 'Go' to produce the clinic list or lists.
Please note that a separate page will be created for each date in the chosen date range.
If you have chosen to list by, for example, Location then a separate page will be created for each date at each location.

## Theatre List

Works in the same way as Clinic list but enter appointment type as Theatre when entering the appointment in the diary

## Diary List

Works in the same way as for the Clinic and Theatre lists above but lists all appointments including those that are not patient related.

## Hospital Clinic List

Works in the same way as clinic list but contains more information

## Send Appointment Letters

Click the Send Appointment Letters button to open the options screen

You may select the date range either by manually entering the date or by using the Calendar to select.

By using the numbered buttons you may advance the start date by the number of weeks shown on the button.
The default settings for Location Resource and Appointment Type are set to 'All' and would normally be left as set.

You may also select an individual patient and print letters only for that patient

It is possible through the Diary set up screen, accessed through the Set up and Maintenance menu, to enable choices of Location, Resource and Appointment Type.

You may also choose to print labels for the Appointment Letters by ticking the box.
Click Go to display appointment letters on the screen.

All appointment letters in the range chosen will be displayed as a single word document with one page for each letter.

You may if you wish edit any of the letters before printing.

Note that copies of the Appointment letters are not stored in the Patient's letter file by default. However this option can be enabled in user options

## Section 2

This section covers:

- Entering payments
- Printing receipts
- Printing Bank Payments slip
- Sending Reminders
- Generating report
- Creating Graphs

## Entering payments

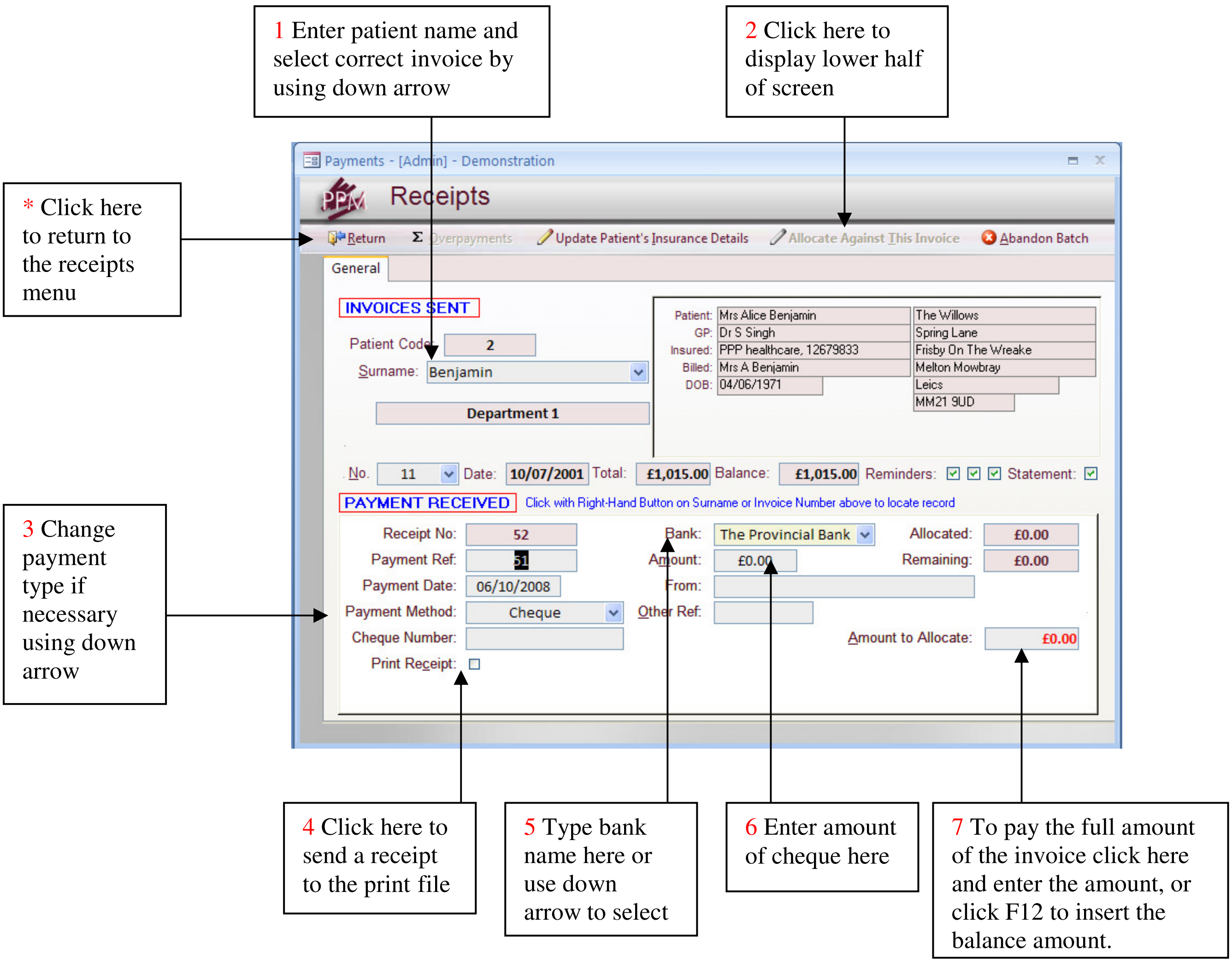
From the main menu screen click the button marked Receipts and Other Income

At the next screen click the button marked Enter Payments

A screen will be displayed showing some of the information on the picture shown below

Follow instructions 1 to 3 on the picture to activate the lower part of the screen

Follow instructions 4 to 7 to enter a payment



## Payment screen - additional features

The program will also manage the following, details of which can be found in the User Guide:

- Multi-payments against a single cheque
- Part-payments
- Shortfalls
- Overpayments

**From the Receipts Menu you may now do the following relating to payments received:**

## Receipts

- Print any receipts requested by clicking the Print Receipt button
- View and print a receipt for any payment (even where the receipt box was not ticked) by clicking the View Reprint a Receipt button

## Bank Payments Slip

Generate a Bank Payments slip by clicking the Bank Payment Slip button

# Reminders

**Click the print reset reminders button on the invoicing and Credit Control screen to display the Reminders screen.**

There are four different reminder options available.

- To print the reminder only (in the same format as the invoice)
- To print the original invoice and the reminder (useful for part-paid invoices as the reminder shows what has been already paid and the invoice provides all of the details of the original account)
- To print a 'reminder look invoice' which is a reprint of the original invoice with the Reminder title and footer. (useful for unpaid accounts where full details of the original account are required)
- To print the reminder as a letter

**The simplest way to produce reminders with the maximum amount of information is to print the Reminders as letters**

**To do this tick the Send letters instead of reminders box on the Print reset reminders parameters screen**

Now click the print reminder button for the reminder (1, 2 or 3) to be printed

After printing is complete click the Return button on the screen (or close Word if you have chosen the reminder letters)

If you are happy that all of the required reminders have printed successfully you should respond yes at the Update files prompt and the files will be updated

## Generating Reports

There are three categories of reports on the Private Practice Manager program

- Patient Care Reports
- Financial Reports and Graphs
- Analysis reports

From the main menu screen select the category of reports that you wish to access

Now select the required report

At the report parameters screen select the parameters as required and click go

The appropriate report will be displayed

## Creating Graphs

PPM links to Microsoft Excel to create a selection of graphs

- From the main screen click the Financial Reports and Graphs button
- On the Financial Reports screen click the Graphs button
- Select the data to graph
- Select the graph type and click go
- When you have finished with the graph close Excel. It is not necessary to save the changes to the Excel workbook