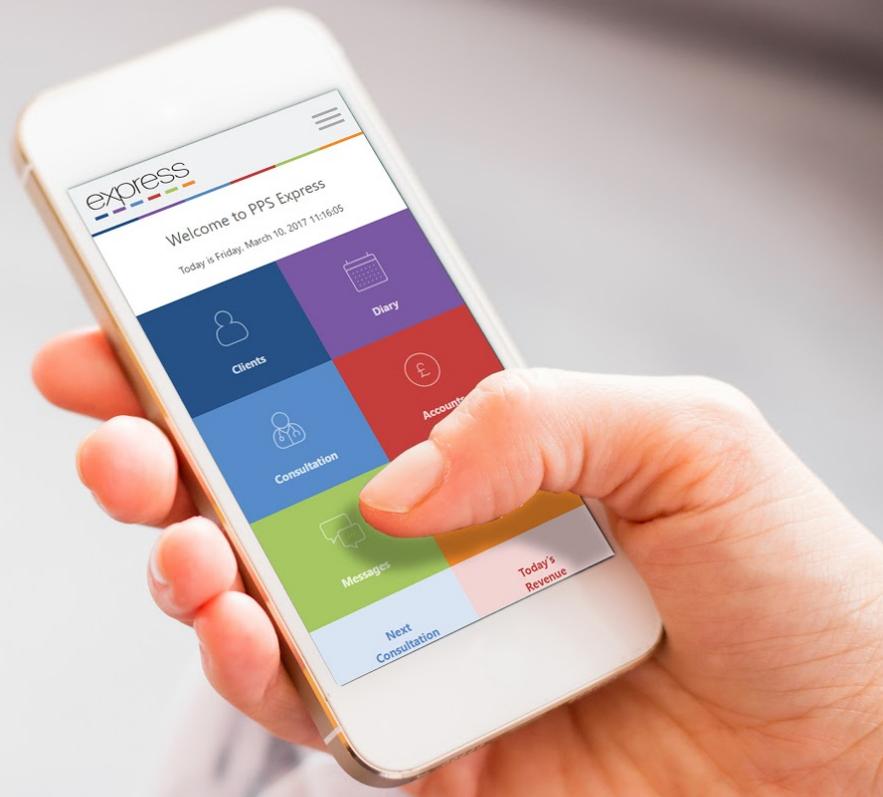




## Welcome to PPS Express



Thanks for choosing PPS Express as the solution for your practice! In order to get you off to the best start, we've put together a small starter pack which will help you get to grips with the basics and ensure that you make the most of your subscription!

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## Setting Up

If you took advantage of our free 30-day trial, then you might already be familiar with some of the setup options. We want you to have the confidence of a PPS pro, so here are our top tips for making sure PPS Express is set up exactly how you want it!

### Getting logged in

Hopefully, you already have this step mastered! But just in case you need a refresher, here's a guide on [how to get access to your PPS Express service](#). As PPS Express is web-based, you can easily bookmark the login page so it's easy to get back to the next time you want to log in!

If you're stepping away from PPS Express to interact with your clients, PPS Express will automatically log you out to avoid anybody accessing your data if your device is unattended! If you need a bit more time and you know that your devices are secure, you can choose to stay logged in for up to 24 hours by following the [steps in this guide](#).

**Top Tip:** Your PPS Express username contains your PPS registration number. It's a 6 digit number that starts with 55. This number allows us to identify your account when speaking with our support or sales teams.

### Appointment booking confirmations and reminders

PPS Express can send out appointment booking confirmations and reminders to your patients to make sure they never miss a booking! You can choose how you want your clients to receive these, either via email or SMS, or a combination of the two! You also have total control of the content of your booking confirmations and reminders so you can make sure that they contain all the info that they need prior to their treatment! Here's [how to set up your templates!](#)

**Top Tip:** Each SMS can hold up to 160 characters, make sure you stick to this limit to avoid using more than one SMS credit per confirmation or reminder! SMS credits can be purchased directly from our sales team and cost around 6p per message. Our bundles of SMS credits start from £30 for 500 credits.

### Your schedule and treatments

PPS Express has a flexible appointments diary that can be set up to suit your schedule. When setting up your diary you can choose the start and end times for each day and set the default appointment duration. You can also split your day into sessions, this is handy if you

work from different locations or if you have a large gap between your appointment slots if you do a morning and an evening clinic. [Here's how to get started.](#)

Once you have your diary set-up, the next step is adding your treatments so that you can start taking bookings! You can add a description of your treatments, the typical duration and the typical charge so when you come to book and bill, PPS Express knows exactly how much time to book out in your diary and how much you want to charge. You can add appointment types when you add your availability, just scroll down!

**Top Tip:** If you have regular breaks or periods of time where you are unavailable that fall between your start and end times, you can use the 'block time' feature when on the diary to mark those slots as unavailable.

## Settings

Now we've covered the essentials there are a few other settings that you might want to take advantage of!

### - Consultation options

In this tab you can tick the box to enable auto-saving. This means that periodically, in the background, PPS Express will save any consultation notes that you have been working on, so if you lose internet connection or anything happens to your device, your notes will be saved without you needing to do anything!

### - Settings

Under the settings tab, you can choose the currency that you want to work in. This is set to GBP by default but you can change this by selecting your chosen currency from the drop-down menu.

### - Beta Access

This is where all of the action is! Our developers are constantly working on updating our products and services and we don't see any reason to hold these updates back from you! Our beta access option allows you to have access to all of the latest features and functionality as soon as they're ready! Some of the updates might be very minor and others might be a more noticeable change. The beta access programme is very important to the development of PPS Express as it allows our clients to test out the new features and give us feedback on what works for you and what doesn't! You can join the beta access programme at any time with the simple click of a button.

# Making the most of PPS Express

## Communications in PPS

PPS Express allows you to send and receive messages from other PPS users!

Just select 'Messages' from your dashboard. This is the green tile.



This brings you to the messages screen:

### Messages

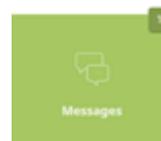
The screenshot shows the 'Messages' interface. At the top, there are 'Inbox' and 'Outbox' tabs. Below them is a search bar containing the word 'All'. On the right side, there is a 'New Message' form with fields for 'To' (a dropdown menu showing '- Select recipient(s) -'), 'Subject', and 'Message' (a large text area). At the bottom of the form are 'Cancel' and 'Send' buttons.

In here you will be able to see your inbox and outbox as well as send new messages.

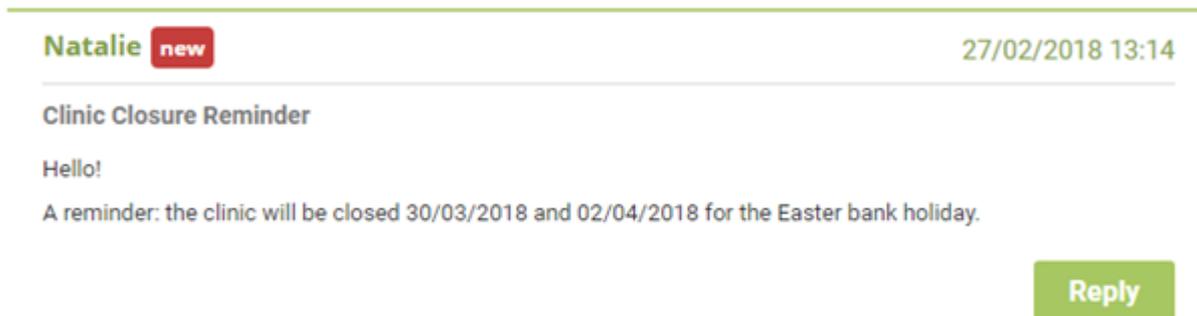
To send a new message, firstly select who you are sending to. You can add multiple recipients by simply clicking 'Select recipients' and adding them to your list. The next step is to add a subject and type your message. Click 'Send' once you are happy with your message.

This screenshot shows the 'New Message' form with the following filled-in fields: 'To' contains 'Dr Julie Smith', 'call handling 1', and 'Natalie'; 'Subject' contains 'Clinic Closure Reminder'; and 'Message' contains 'Hello!  
A reminder: the clinic will be closed 30/03/2018 and 02/04/2018 for the Easter bank holiday.' The 'Cancel' and 'Send' buttons are visible at the bottom.

When you receive a new message you will get a notification pop up on your dashboard:

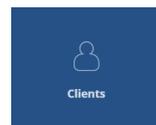


When you go into your message area, the new message will appear in your inbox with a 'new' icon on it.



You can choose to reply or navigate back to your diary. If you choose to reply, you can also add additional recipients by selecting them from the list.

## Using the client log



Select 'Clients' from your dashboard. This is the blue tile:

PPS Express keeps a record of all of your interactions with your clients via the software. This means that your client log is a central hub of information on each of your patients. If you want to check on the status of a particular invoice or review some consultation notes just click clients, search for and select your client and use the client log tab to view everything that has been recorded.

Each item will have a colour associated to it to indicate the status of the item, the key for these colours can be found at the top.

Navigation tabs: Clients | Diary | Consultation | Accounts | Messages | Reports

**Miss Dorothy Smith** - 50060 Edit Delete Start Consultation Add New Client

Search: name, ref no., email, tel, town or postcode. Search

Client Details | **Client Log**

**Key** ● No Status ● Action Required ● In Progress ● Complete ● Attention All Types

Date	Type	Heading	Practitioner / User
12/04/2018	Appointment	9:00 am Thu 12 Apr 2018 DOUBLE LENGTH CONSULTATION	Clinical Assistant
20/03/2018	Appointment	10:30 am Tue 20 Mar 2018 FOLLOW UP PHYSIO CONSULTATION	Alan Davies
22/06/2017	Invoice	Miss Dorothy Smith Invoice: 000238 <span style="float: right;">Total: £30.00</span> <span>Download PDF</span> <span>Send Invoice</span>	
		22/06/2017 Initial Physiotherapy Assessment <span style="float: right;">£30.00</span>	
		22/06/2017 Cash <span style="float: right;">CR £30.00</span>	
22/06/2017	Consultation	Mr Arnold James	Mr Arnold James
22/06/2017	Appointment	2:00 pm Thu 22 Jun 2017 INITIAL PHYSIO ASSESSMENT	Mr Arnold James

**Top Tip:** Use the drop-down menu at the top of the client log to filter your view. If you're looking for a particular invoice, select 'Invoice' to only show invoices for a clearer view and fewer items to look through!

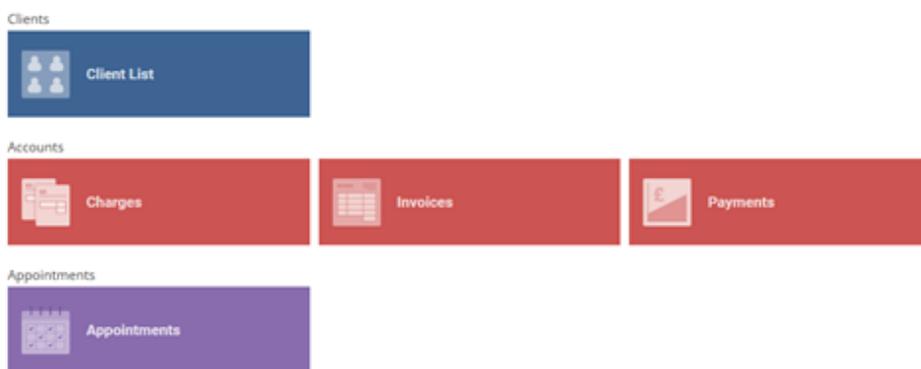
## Reporting on KPIs



Select 'Reports' from your dashboard. This is the orange tile.

This takes you to the reporting screen:

Select your report



In here you can select to report on your Clients, Accounts and Appointments.

A 'Client List' report allows you to review details of clients that were registered on the system during the selected date range.

There are three accounts reports available, use them to view details of Charges, Invoices and Payments, applying a date range to pull through the information you require.

The 'Appointments' report allows you to gather information on the appointments booked in your diary, for a specific date range.

Select the report you require, choose your date range and click RUN REPORT.

Clients List Report

from 01/01/2018 to 02/03/2018 [Run Report](#) Email address  [Email Report](#) [Print Report](#)

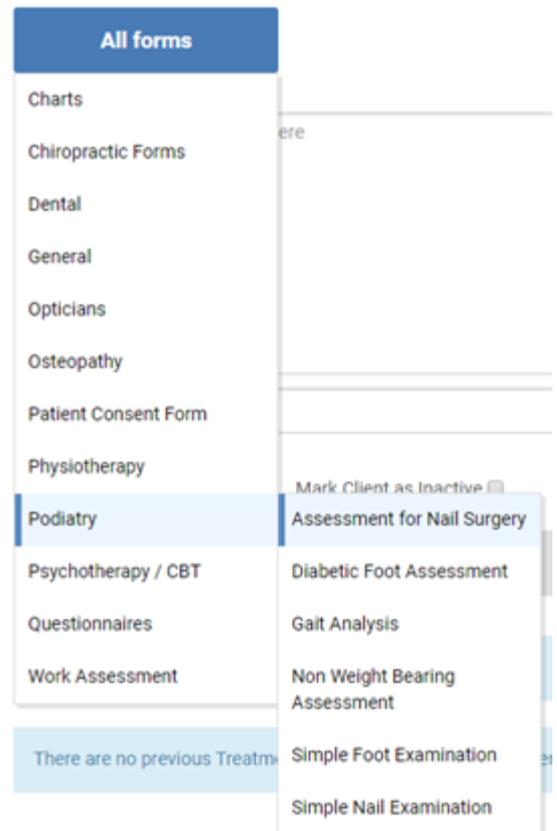
100 per page showing 3 out of 3

Client No.	Name	Address	Tel. H	Tel. M	Tel. W	E-Mail	E-Mail (CC)	DOB	Ref.	Status
00042586923	Natalie Walker	-	-	-	01283550777	natalie@rushcliff.com	-	-	-	Active
00061586923	Ms Chaya Nakatani	-	-	-	-	kate@rushcliff.com	-	-	-	Active
00060586923	Miss Red Grape	-	-	07585504101	-	gmatthews@lve.co.uk	-	-	h	Active

Once you have your report, you can email or print it off. If you choose to email it to yourself, type your email address in the address box and hit send. You will receive an email with the data attached in a spreadsheet, ready for you to manipulate. Simple!

## Taking notes and using forms

In PPS Express there are a number of ready-made forms for recording your notes, enabling you to collect specific information about your clients and their treatments. The forms contain different question types including free text, numeric, multiple choice and pain scales! There are lots of forms to choose from, they cover different disciplines and different types of treatments or assessments and can help to regulate the capture of your data.



**Top Tip:** When you're recording your treatment notes you can save time by dictating directly into the consultation notes box! Just select consultation, click into the box and then use the software built into your device like Siri or Cortana to save you typing up your notes.

## Don't forget!

We're here when you need us! You've got everything you need to use PPS Express to its full potential but we do recognise that from time to time you might still have a question or need some advice. If you do need some help [www.ppssupport.com](http://www.ppssupport.com) is the home of all of our help guides and videos. If you can't find what you're looking for in our guides, our friendly support team are always on hand, you can find their contact details on our website here.

## Help & Feedback

Whenever you are logged in to PPS you have direct access to our help and feedback by clicking on the blue button at the bottom of your screen. If you need some help or advice from our support team you can check the knowledge base or raise a ticket with them. If you just want to let us know what you think, click feedback! The feedback we receive influences the development of our products and features, so if there is something you think we could improve on or something new that you think you would benefit from, please let us know!

