



Quick Reference Guide

# *PPM Connect App - Apple*

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*PPM Connect App – 1.1*

*March 2011*

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## Introduction

The PPM Connect App is a mobile edition of Connect Front Office, an application of the PPM: Connect<sup>SM</sup> platform. Get the power of the Connect platform from your mobile device 24/7.

- Manage your appointment calendar.
- View your scheduled appointments.
- Enter additional notes and comments for scheduled appointments.

The PPM Connect App works with the following Apple® mobile devices:

- iPhone®
- iPod touch®
- iPad™

This application requires the Apple® operating system (OS) 3.1.2 or later.

The application is available, at no cost, on the App Store<sup>SM</sup> to all Connect platform and RCM Services clients.

### ***About This Guide***

This guide is a quick reference and training tool for anyone who will be using the PPM Connect App with an Apple device to access the Connect Front Office appointment calendar.

The guide is organized by the tasks that you must complete successfully to download the application from the App Store, to configure the application, and to use the application for previewing your Connect Front Office appointments.



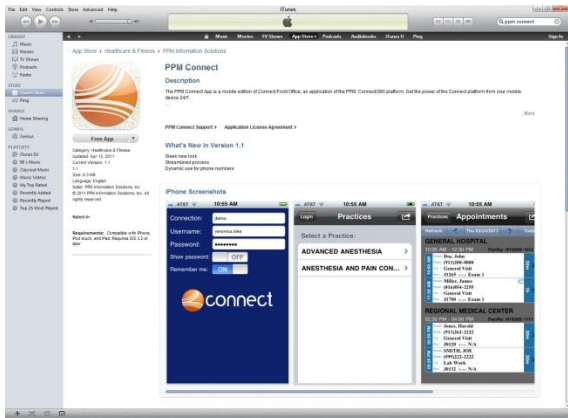
### ***What's in This Guide***

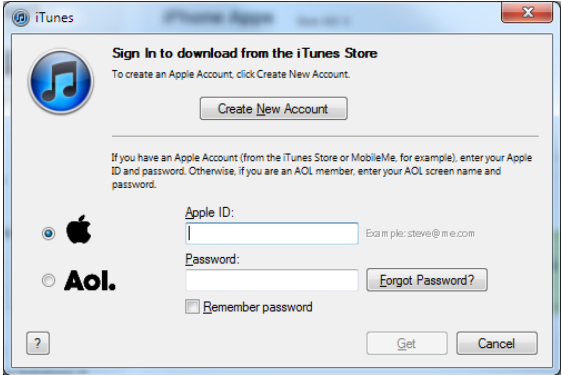

The following topics are related to the tasks that you must complete:

- Downloading the PPM Connect App
- Configuring the PPM Connect App
- Navigating in the PPM Connect App
- Login In
- Selecting a Practice
- Viewing Appointments
- Entering Notes and Comments

# Downloading the PPM Connect App

The PPM Connect App is available from the [App Store](#) either directly from your mobile digital device or from your computer using iTunes®. These instructions are for downloading the PPM Connect App from iTunes on your computer.

	What to do	What happens										
1.	<p>Connect your Apple® mobile digital device to your computer.</p> <p>If you have not installed iTunes on your computer, go to <a href="http://www.apple.com">www.apple.com</a>, and download and install the iTunes application.</p>	<p>The PPM Connect App works with:</p> <ul style="list-style-type: none"> <li>▪ iPhone®</li> <li>▪ iPod touch®</li> <li>▪ iPad™</li> </ul>										
2.	<p>Go to <b>App Store</b>, and then type <b>ppm connect</b> in the search box.</p>	<p>The PPM Connect App appears in the purchase pane.</p>  <p>The screenshot shows the iTunes interface with a search for 'ppm connect'. The results show the 'PPM Connect' app under the 'iPhone Apps' category. Below the app listing, there are sections for 'Podcasts' and 'Podcast Episodes'. At the bottom, there is a 'Purchase pane' with a table of results.</p> <table border="1" data-bbox="1084 1010 1425 1052"> <thead> <tr> <th>Name</th> <th>Podcast</th> <th>Released</th> <th>Popularity</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Let's Talk About Conversations</td> <td>Planned Parenthood Advocates</td> <td>100000</td> <td>FREE</td> </tr> </tbody> </table>	Name	Podcast	Released	Popularity	Price	1	Let's Talk About Conversations	Planned Parenthood Advocates	100000	FREE
Name	Podcast	Released	Popularity	Price								
1	Let's Talk About Conversations	Planned Parenthood Advocates	100000	FREE								
3.	<p>Right-click on the PPM Connect App icon (as shown in the right column), and then click <b>Open Link</b>.</p>	 <p>The application details appear.</p>  <p>The screenshot shows the iTunes application details page for 'PPM Connect'. It includes a description, a 'Description' section, and 'iPhone Screenshots'. The screenshots show the app's interface with fields for 'Connection', 'Practices', and 'Appointments'. The 'Practices' section lists 'ADVANCED ANESTHESIA' and 'ANESTHESIA AND PAIN CON...'. The 'Appointments' section shows a list of appointments for 'MUSKOGEE MEDICAL CENTER'.</p>										

	What to do	What happens
4.	Click <b>Free App</b> .	The iTunes log in dialog box appears.
5.	Log in using your iTunes log in credentials. If you do not have these credentials, create a new account.	
6.	Wait a few moments for the application to download and install on your Apple® mobile digital device.	 <p>The icon appears on the component screen.</p> <p>You are now ready to configure the PPM Connect App. See <a href="#">Configuring the PPM Connect App</a> in the next section.</p>

## Configuring the PPM Connect App

The configuration must be completed prior to using the PPM Connect App. You must provide the name of the practice and the URL to instance of your practice issued by PPMIS. This URL is that same one used for accessing all other Connect applications.



Before configuring the PPM Connect App, make sure that your user log in has an associated physician. Your Connect administrator must specify the physician in your user account in Connect Administration.

The screenshot shows the 'Connect Administration' web application interface. The browser title is 'Connect Administration [https://demo.ppmconnect.net]'. The left sidebar contains a tree view with categories: Practices, Providers, Facilities, Payers & Plans, Denial Management, Statement Override Messages, Concurrency Schemes, Financial Classes, Sessions, Users, and a sub-menu for Users including Create, Manage, and List. The 'List' sub-menu is expanded, showing a list of users such as Administrator, System; Anderson, Bradley; Anderson, Bruce; Apple, Test; Blankenship, Jason; Caldwell, Chris; Dietsch, Debra; Franklin, Rebecca; Goodwin, Chris; Goodwin, Jason; Goodwin, Jason; James, Tim; Jones, Manolito; Mack, Ebony; monitor, app; Morgan, Orion; Office, Front; Olin, Dan; Only, View; Pycior, Monica; SCANNER, MIMS; and Wright, Caleb. The main content area is titled 'User: Pycior, Monica' and contains two sections: 'General Information' and 'Login Setup'. The 'General Information' section includes fields for Name (Last: Lake, First: Veronica, Middle: , Suffix: , Title: ), Phone Number (Area: ( ) -, Ext: ), Email: , Account Status (Active selected, Inactive), and Administrator (Yes selected, No). A red warning message states: 'Important: Administrators have unrestricted access to all areas of Front Office and Back Office for all practices. Use caution when granting Administrator privilege.' The 'Login Setup' section includes a Username field with 'veronica.lake' and a note: 'Username must be unique. Username cannot contain a space.' and a Physician dropdown menu with 'Banner Mr. Br...' selected and a note: 'Maps account to a physician.' At the bottom right of the form are 'Save', 'Apply', and 'Close' buttons. The footer of the application shows: 'Created By: Goodwin, Jason', 'Created At: 03/17/2011 02:09:35 PM', 'Updated By: Pycior, Monica', and 'Updated At: 03/18/2011 02:05:36 PM'.

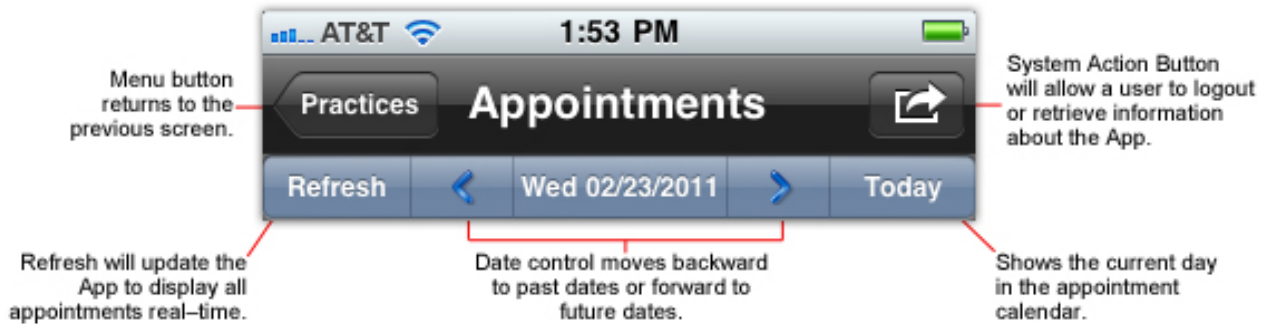
## Navigating in the PPM Connect App


The screens include a navigation bar that provides buttons for returning to the previous screen in the series or the ability to logout of the application.

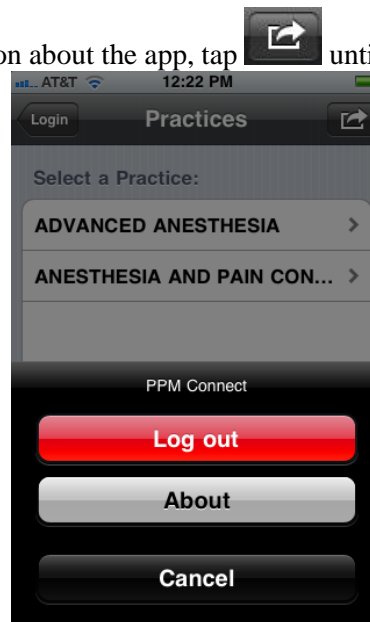


## The Navigation Bar


The Navigation bar includes the button for returning to the previous screen in the series, the System Action button that will log the user out of the app in any screen, the Refresh button, the calendar control, and the Today button.



- To return to the previous screen, tap the menu button, for example, Practices. Please be aware that the label on the button will be for the previous window.
- To log out or to retrieve information about the app, tap  until the Log out/About screen displays.

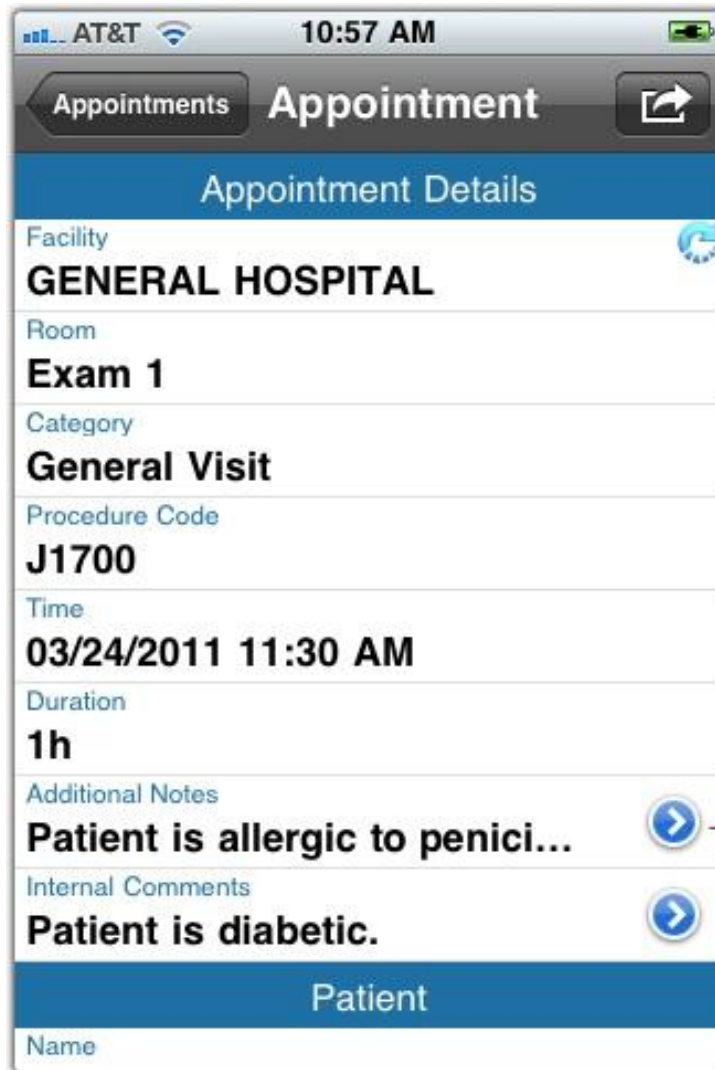


The Log out action will log a user completely out of the app without saving any changes. The About option will only display copyright and version information for the app.

- To display real-time data in the app, a user can tap on the  button in the title bar. This action will provide all up to date appointments and associated information.
- To show the appointments for a date in the past, tap < until that date appears in the title bar or long hold on the date control and the date picker control will allow a user to select the month, day and year.
- To show the appointments of a future date, tap > until that date appears in the title bar or long hold on the date control and the date picker control will allow a user to select the month, day and year.
- To return to the current date, tap **Today**.

## Navigation Aides

Use navigation aides to show the details of an appointment or to expand the comments and notes if applicable.






To see content that is not visible on the screen, scroll up or down.


Navigation aide

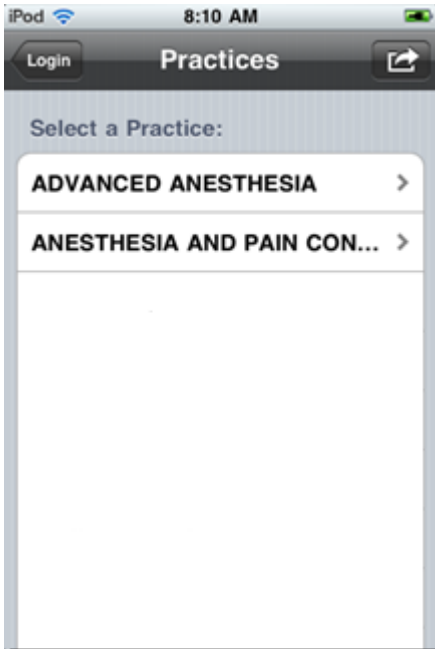
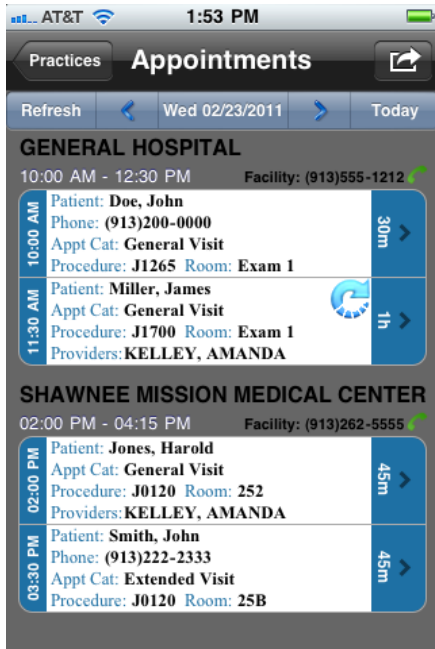
## Logging In

You must log in to the PPM Connect App by providing your user name and password. Your user log in must have an associated physician. Your Connect administrator must set this up in your user account in Connect Administration.

	What to do	What happens
1.	Begin at the Home screen. Tap  .	The Login screen appears. 

	What to do	What happens
2.	Tap the Connection text box.	<p>A keyboard will appear on the device. Type only the unique name of the URL for the practice instance you would like use. For example: https:\\demo.ppmconnect.net the unique name is demo.</p> 
3.	Tap the Next button on the keyboard. The cursor will take you to the Username text box.	Type the user name. Example: <code>firstname.lastname</code>
4.	Tap the Next button on the keyboard. The cursor will take you to the Password text box.	Type the password for the user name.

	What to do	What happens
5.	<p>Tap GO on the keyboard.</p> <p>Note: If Show password or Remember me is needed proceed to Show Password.</p>	<p>Slide either the Show Password or Remember me button if there is a need to show the password or to remember the Connection URL unique name and Username.</p> 

	What to do	What happens
1.	Tap <b>Connect</b> .	<p>One of the following screens appears: the Practices screen or the appointment calendar.</p> <p>If you have more than one practice, the Practices screen appears, and you must select a practice with which to work. Otherwise, you go directly to the appointment calendar.</p> <p>You are now ready to begin working with the scheduled appointments from Connect Front Office.</p>
		

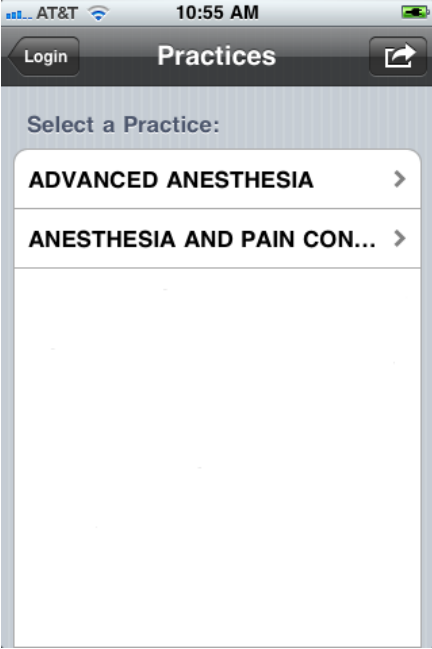


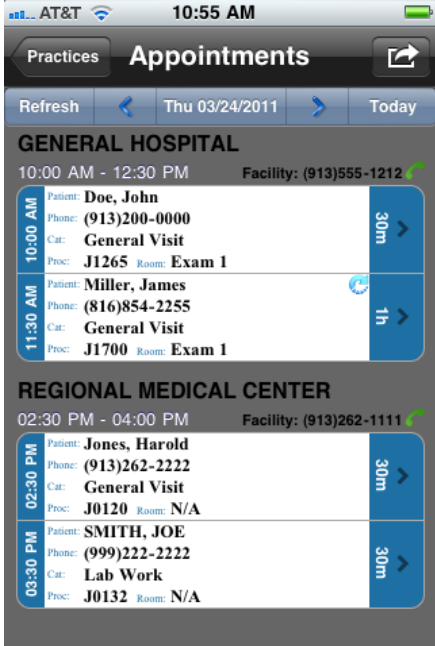
By default, the calendar displays the appointment for the current day. If there are no appointments scheduled for the current day, the appointment calendar is blank. Use the navigation arrows in the date bar or the date control to the previous or next day. Use these arrows to move backward or forward to the appropriate day.

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## Selecting a Practice

If you have more than one practice in your instance of the Connect platform, you must select a practice for the appointments you want to view. If you only have one practice, your practice is already selected. You do not see the Practices screen.


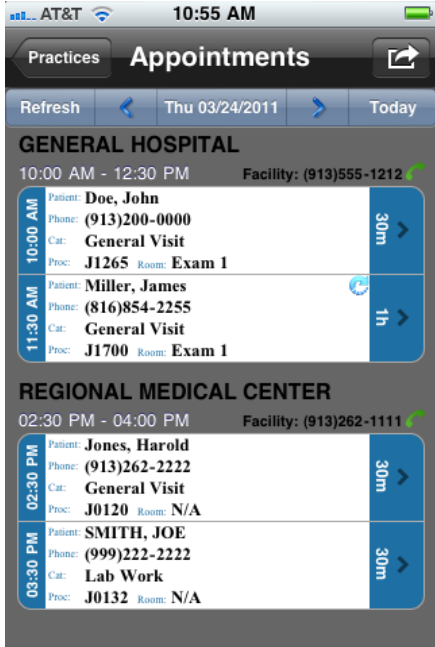
	What to do	What happens
1.	Begin at the Practices screen.	


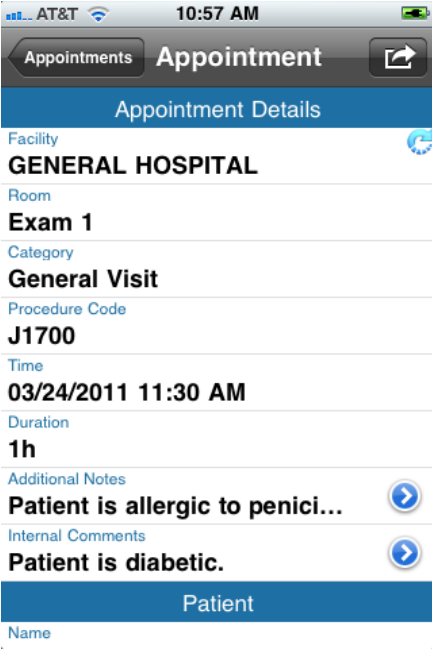
	What to do	What happens
2.	<p>From Select a Practice, tap the <b>practice</b> for the appointments that you want to view.</p> <p>You are now ready to view appointments are to enter notes and comments.</p> <p>See <a href="#">Viewing Appointments</a> or <a href="#">Entering Notes and Comments</a> later in this guide.</p>	<p>The appointment calendar for the practice that you selected appears.</p>  <p>The screenshot shows a mobile application interface titled 'Appointments'. At the top, it displays 'Practices' and 'Appointments' with a refresh icon. Below this, there are navigation options: 'Refresh', a left arrow, the date 'Thu 03/24/2011', a right arrow, and 'Today'. The main content is divided into two sections: 'GENERAL HOSPITAL' and 'REGIONAL MEDICAL CENTER'. Each section shows a time range and a facility phone number. Under 'GENERAL HOSPITAL' (10:00 AM - 12:30 PM, Facility: (913)555-1212), there are two appointments: one for 'Doe, John' at 10:00 AM (30m duration) and one for 'Miller, James' at 11:30 AM (1h duration). Under 'REGIONAL MEDICAL CENTER' (02:30 PM - 04:00 PM, Facility: (913)262-1111), there are two appointments: one for 'Jones, Harold' at 02:30 PM (30m duration) and one for 'SMITH, JOE' at 03:30 PM (30m duration). Each appointment card includes the patient name, phone number, category, and procedure details.</p>


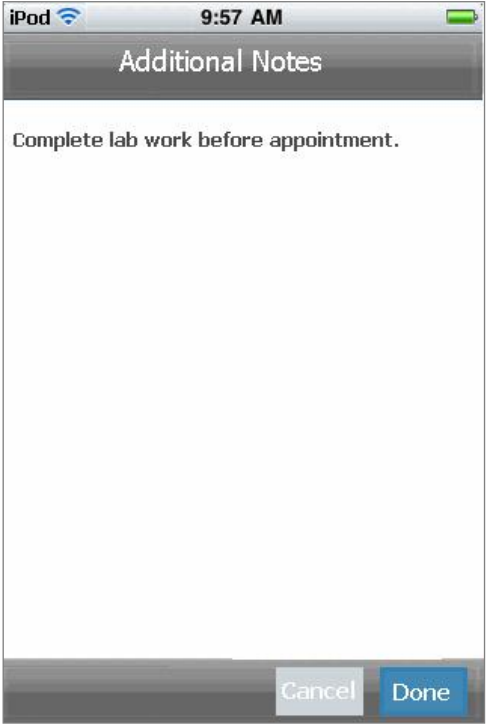
## Viewing Appointments

By default, the appointment calendar shows the appointments for the current day. If there are no appointments for the current day or the date specified, the appointment calendar is blank.

You can view the appointments for the current day or appointments in the past or future on the appointment calendar.

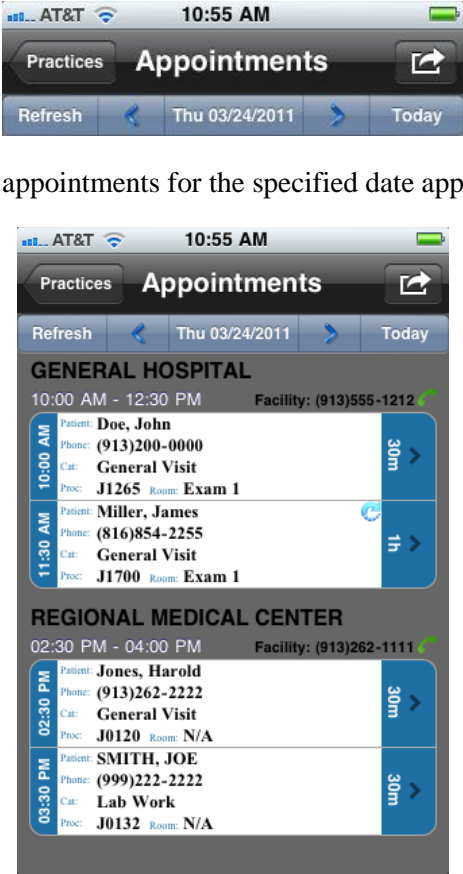
	What to do	What happens
1.	Log in to PPM Connect App.	The appointment calendar for the current day appears.
2.	Do one of the following: <ul style="list-style-type: none"> <li>▪ To view appointments for a different day, tap &lt; or &gt; in the navigation bar or use the date control until the date you want to view appears.</li> <li>▪ To view appointment details, go to the next step.</li> </ul>	 <p>The appointments for the specified date appear in the appointment calendar.</p> 

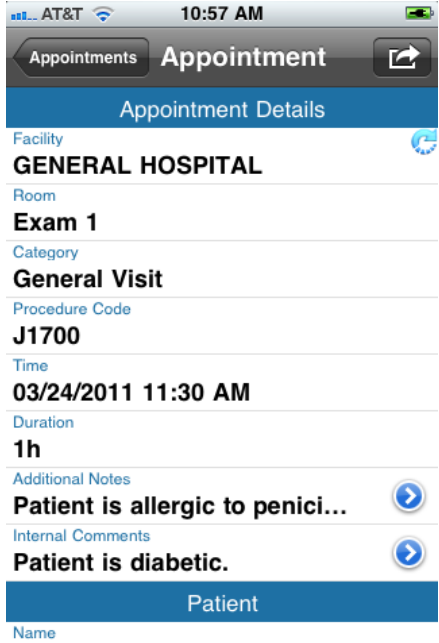


	What to do	What happens
3.	<p>Tap the appointment that you want to view in detail.</p> <p>The appointment details are listed by Appointment Details, Patient, and Provider Information.</p> <p>Note: The  symbol is to identify those appointments that are recurring.</p>	<p>The appointment details appear.</p>  <p>The screenshot shows a mobile app interface with a status bar at the top displaying 'AT&amp;T' and '10:57 AM'. Below the status bar is a navigation bar with 'Appointments' and 'Appointment' buttons, and a share icon. The main content area is titled 'Appointment Details' and lists the following information: Facility: GENERAL HOSPITAL (with a recurrence symbol); Room: Exam 1; Category: General Visit; Procedure Code: J1700; Time: 03/24/2011 11:30 AM; Duration: 1h; Additional Notes: Patient is allergic to penici... (with a right arrow); Internal Comments: Patient is diabetic. (with a right arrow). At the bottom, there is a 'Patient' section with a 'Name' label.</p>
4.	<p>Drag the screen up or down to the desired section of the appointment detail: Appointment Details, Patient, or Provider Information.</p>	<p>The section to which you scrolled appears.</p>

	What to do	What happens
5.	<p>When you are finished viewing the appointment details, do one of the following:</p> <ul style="list-style-type: none"> <li>▪ To return to the appointment calendar, tap <b>Appointments</b> in the navigation bar.</li> <li>▪ To view additional information about the appointment or patient, tap .</li> </ul> <p>You can view or edit additional notes, internal comments, symptoms, or special instructions.</p> <p>See <i>Entering Notes and Comments</i> in the next section.</p>	<p>If you opted to return to the appointment calendar, the appointment calendar appears.</p> <p>If you opted to view additional information, the applicable screen with that information appears, for example, Additional Notes.</p> 

## Entering Notes and Comments

You can add or edit additional notes, internal comments, symptoms, or special instructions.

	What to do	What happens
1.	Log in to PPM Connect App.	The appointment calendar for the current day appears.
2.	<p>Find the <b>appointment</b> for which you want to enter notes or comments.</p> <ul style="list-style-type: none"> <li>▪ To view appointments for a different day, tap &lt; or &gt; in the navigation bar until the desired date appears.</li> <li>▪ To see appointments that are listed by not visible, drag the screen up or down to the desired appointment.</li> </ul>	<p>The appointments for the specified date appear.</p> 

	What to do	What happens
3.	<p>Tap the <b>appointment</b> that you want to view in detail.</p>	<p>The appointment details appear.</p> 
4.	<p>Tap  next to the item that you want to add or edit: Additional Notes, Internal Comments, Symptoms, or Special Instructions.</p> <p>The process of adding or editing notes is the same for all information.</p>	<p>The applicable screen appears, for example, Additional Notes.</p> 

	What to do	What happens
5.	Tap the <b>screen</b> to display the keyboard.	The keyboard appears.
6.	Type the <b>information</b> that you want to enter, and then tap <b>Done</b> .	The applicable screen appears with the newly entered text.
7.	Review the <b>text</b> and make any necessary edits, and then tap <b>Done</b> .  To edit the text, tap the screen to display the keyboard.	The appointment details appear with the updated text displayed.
8.	When you are finished working with appointments, close the PPM Connect App.	The Home screen appears.