# **Program and Practice Management (PPM)**

Add / Edit residents and students, Register for ACR programs, Make Payments and Manage your programs

### **Sections Quick Links**

- How to access the PPM
- Summary Information for Resident Programs
- Summary Information for Medical Student, PA and NP Programs
- How do I register my residents or students for a program?
- Edit / Update Constituents
- Add New Constituents
- Purchase Program Registrations
- Checkout Registration Order
- Transfer / Assign Registrations
- Manage Addresses
- Submit Program Request
- Support

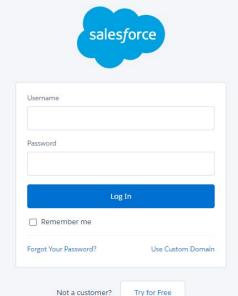
# What is the PPM used for?

- The PPM allows programs and practices to:
- Manage your program and practice residents, students, faculty, staff
- Purchase and register for ACR programs
  - DXIT/RadExam
  - TXIT
  - AIRP
  - Radiology-TEACHES
  - STARS
- Pay for purchased programs via credit card or print invoices
- Verify payment for access to programs
- Manage program and practice information, addresses

### How to access the PPM

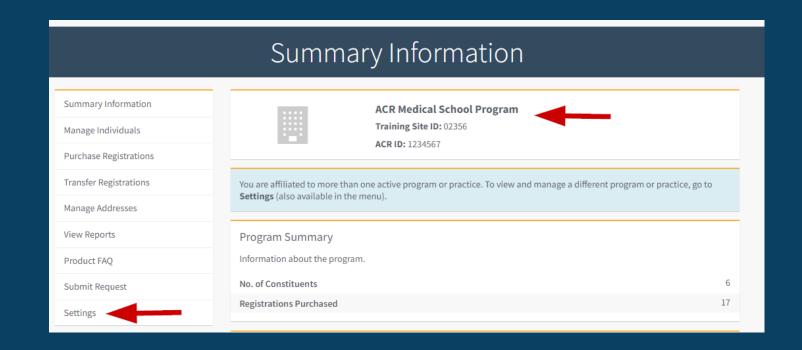
Log on using your new account at:

https://ppm.acr.org/ppm/com-dashboard



### Summary Information for Resident Programs

- Make sure to check the dashboard and verify that you are looking at the correct program if you manage more than one program
- To change the program, go to Settings

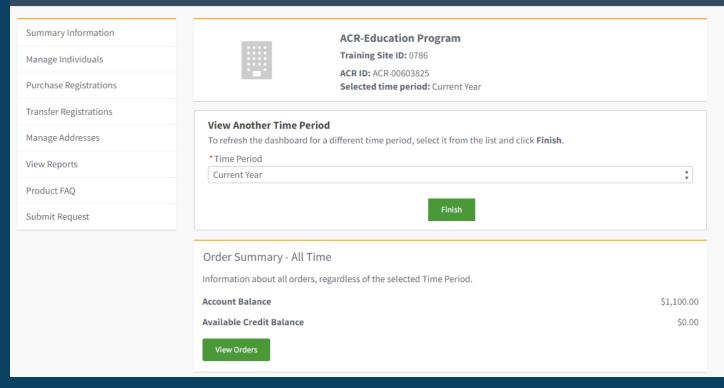




### Summary Information for Resident Programs

 Provides a snapshot of your program order for a selected time frame

### Summary Information



### Summary Information for Resident Programs

- Provides view of registrations and orders
- View button provides information on the registrants for that order

### Summary for Selected Time Period

Information about event registrations starting in the selected Time Period.

Registrations Purchased	6
Trainees Registered	2
Special Request Submitted	0
Amount Billed	\$666.00
Amount Paid	\$111.00
Balance Due	\$555.00

#### Product Summary for Selected Time Period

Information for each product for event registrations starting in the selected Time Period.

Product	Registrations Purchased	Trainees Registered	Special Request Submitted	Amount Billed	Amount Paid	Balance Due	
DXIT/RadExa	6	2	0	\$666.00	\$111.00	\$555.00	View

#### Need Help?

If you have any questions regarding registration payment or the registration process, please email com@acr.org.

# Summary Information for Medical Student, PA and NP Programs

- Provides view of registrations and orders
- Action button displays invoice



### Summary Information

Summary Information

Manage Individuals

Purchase Registrations

Transfer Registrations

Manage Addresses

View Reports

Product FAQ

Submit Request

Settings

**ACR Medical School Program** 

Training Site ID: 02356

ACR ID: 1234567

You are affiliated to more than one active program or practice. To view and manage a different program or practice, go to **Settings** (also available in the menu).

**Program Summary** 

Information about the program.

No. of Constituents

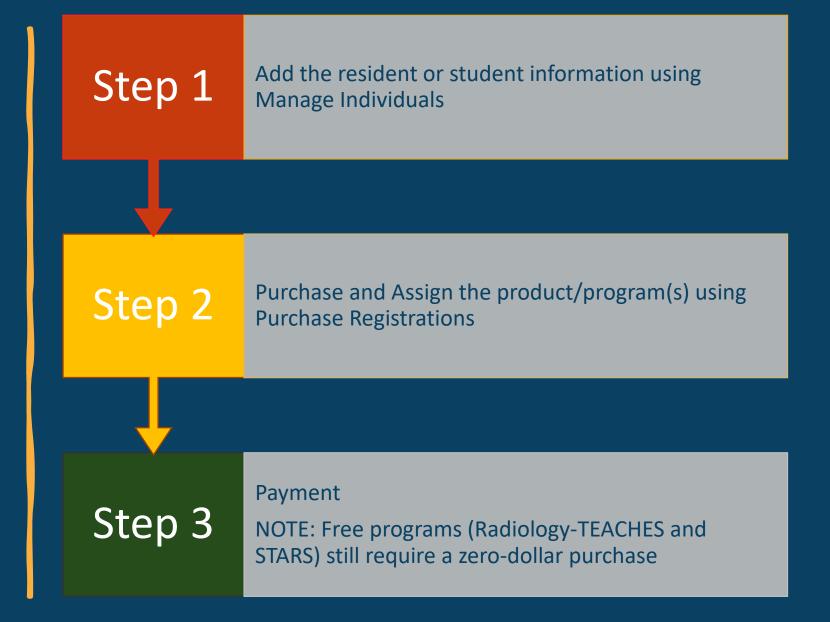
Registrations Purchased

Order Details

All orders for the program.

Order Id	Transaction Date	Registration Items	Named Registrants	
Order 3755307	12/6/2021	1	1	Actions
Order 3756060	2/28/2022	1	1	Actions
Order 3756083	3/4/2022	1	1	Actions
Order 3756328	3/29/2022	1	1	Actions
Order 3755545	1/5/2022	1	1	Actions

How do I register my residents or students for a program?



Step 1

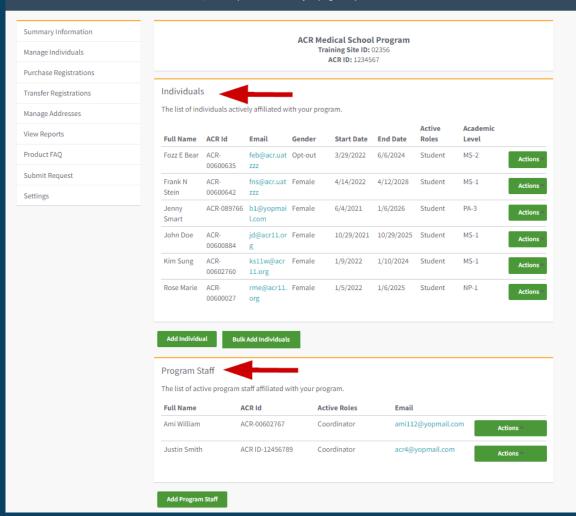
Add the resident or student information using Manage Individuals

# Manage Constituents

Manage Individuals will display the current roster for both Individuals (residents / students) and Program Staff (Coordinators, Directors, Chief Resident, Chair)

#### Manage Individuals

View, add and update individuals for your program or practice.

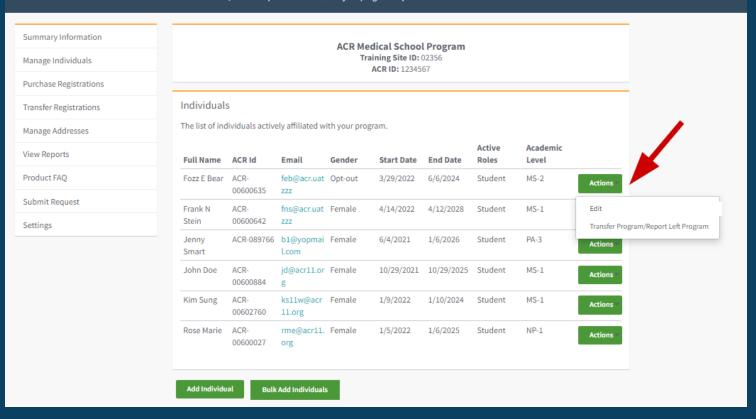


# Edit / Update Constituents

Use the Action button to Edit/Update or Deactivate an individual or staff account

### Manage Individuals

View, add and update individuals for your program or practice.



# Add New Constituents

Use the Add or Bulk buttons to add new constituents to your program

### Manage Individuals

View, add and update individuals for your program or practice.

Summary Information  Manage Individuals
Manage Individuals
Purchase Registrations
Transfer Registrations
Manage Addresses
View Reports
Product FAQ
Submit Request
Settings

#### ACR Medical School Program Training Site ID: 02356

ACR ID: 1234567

#### Individuals

The list of individuals actively affiliated with your program.

Full Name	ACR Id	Email	Gender	Start Date	End Date	Roles	Academic Level	
Fozz E Bear	ACR- 00600635	feb@acr.uat zzz	Opt-out	3/29/2022	6/6/2024	Student	MS-2	Actions *
Frank N Stein	ACR- 00600642	fns@acr.uat zzz	Female	4/14/2022	4/12/2028	Student	MS-1	Actions
Jenny Smart	ACR-089766	b1@yopmai l.com	Female	6/4/2021	1/6/2026	Student	PA-3	Actions
John Doe	ACR- 00600884	jd@acr11.or	Female	10/29/2021	10/29/2025	Student	MS-1	Actions
Kim Sung	ACR- 00602760	ks11w@ _r 11.or	Female	1/9/2022	1/10/2024	Student	MS-1	Actions
Rose Marie	ACR- 00600027	p e@acr11. org	Female	1/5/2022	1/6/2025	Student	NP-1	Actions

Add Individual

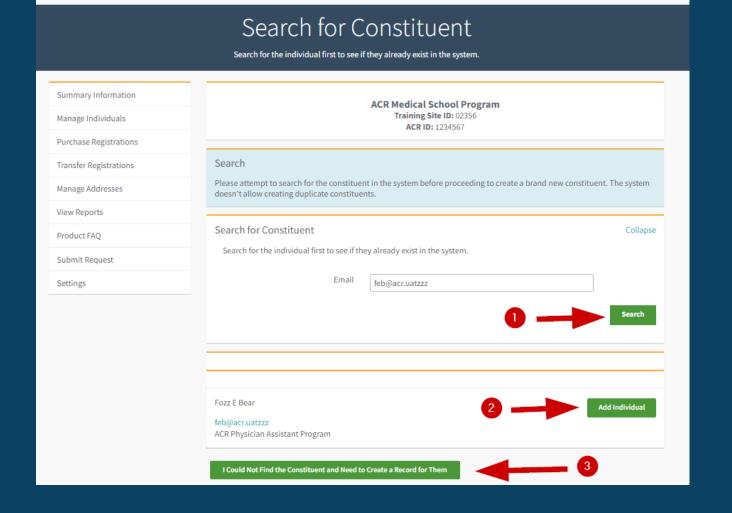
Bulk Add Individuals

# Add Single Constituent

Step 1 – Search via email to see if there is an account

Step 2 – If individual displays, click the Add Individual button and complete the form

Step 3 – If no account exists, click the button at the bottom and complete the form



- Used for uploading a group of individuals into the system
- Click the Bulk Add button

### Manage Individuals

View, add and update individuals for your program or practice.

Summary Information
Manage Individuals
Purchase Registrations
Transfer Registrations
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Settings

#### ACR Medical School Program Training Site ID: 02356

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Fozz E Bear	ACR- 00600635	feb@acr.uat zzz	Opt-out	3/29/2022	6/6/2024	Student	MS-2	Actions
Frank N Stein	ACR- 00600642	fns@acr.uat zzz	Female	4/14/2022	4/12/2028	Student	MS-1	Actions
Jenny Smart	ACR-089766	b1@yopmai l.com	Female	6/4/2021	1/6/2026	Student	PA-3	Actions
John Doe	ACR- 00600884	jd@acr11.or g	Female	10/29/2021	10/29/2025	Student	MS-1	Actions
Kim Sung	ACR- 00602760	ks11w@ _r 11.or	Female	1/9/2022	1/10/2024	Student	MS-1	Actions
Rose Marie	ACR- 00600027	p e@acr11. org	Female	1/5/2022	1/6/2025	Student	NP-1	Actions

Add Individual

Bulk Add Individuals

Download the sample file for the data

You must use the approved upload format

### Upload Individuals

Add individuals in bulk to your program or practice.

Summary Information

Manage Individuals

Purchase Registrations

Transfer Registrations

Manage Addresses

View Reports

Product FAQ

Submit Request

Settings

ACR Medical School Program Training Site ID: 02356 ACR ID: 1234567

Return to Individual Management

Please download the sample file from HERE

#### Instructions to upload bulk Student records:

- Download the sample Bulk\_IndividualUpload Upload (Demo) excel file to your computer/Laptop.
- 2. Enter all the required details in the downloaded excel file.
- 3. Save As the excel file into the CSV (Comma delimited)(\*.csv) format.
- 4. Click on the Bulk Add Resident button.
- 5. Upload your CSV (Comma delimited)(\*.csv) file.

Upload Your CSV File

**Add Additional Files** 

Choose A File...

Uploaded Files

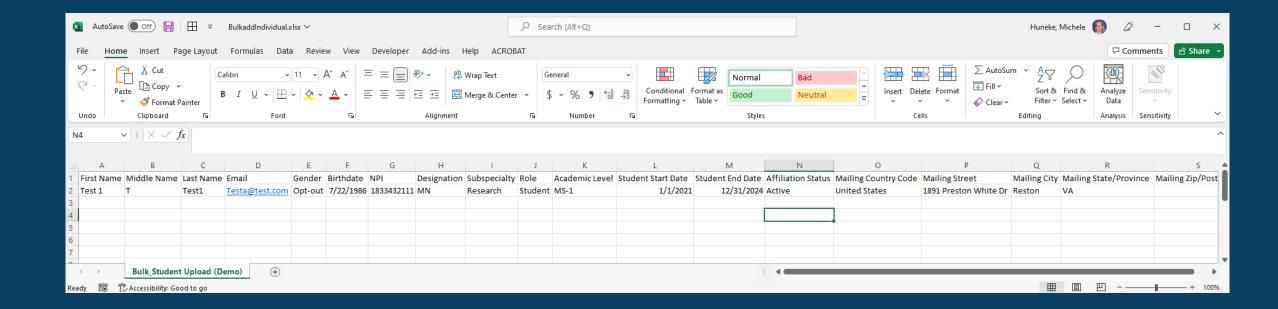
No files have been uploaded yet.

Uploa

Don't Refresh

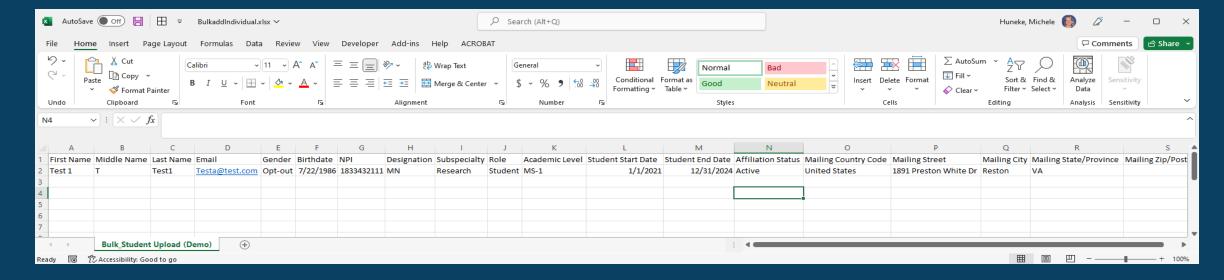
Do not refresh while processing

DO NOT USE Previous spreadsheet formats

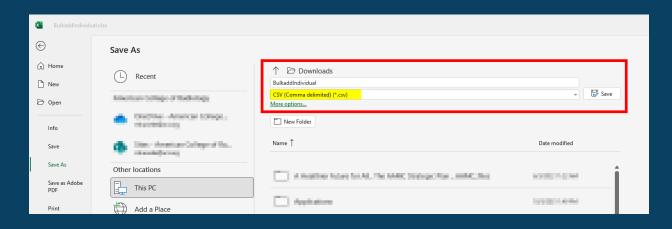


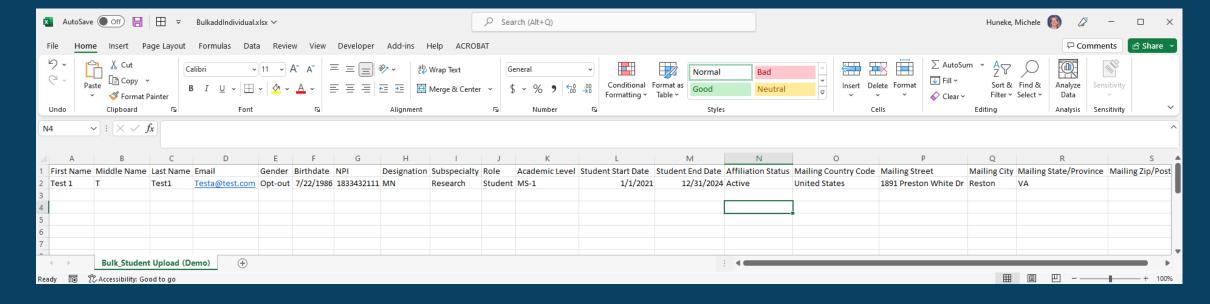
### Filling out the Spreadsheet: Required Fields

- First, Last Name Middle name or initials helps identify those with similar names
- Email
- Gender
- Birthdate for students unable to provide birthdate use 12/31/2999
- Role Enter Resident or Student
- Academic Level R-1, MS-1, etc.
- Start and End Dates
- Affiliation Status Active



IMPORTANT – save the completed spreadsheet as a CSV file format – NOT EXCEL





- After completing and saving as a CSV file, click the Choose A File button
- The file name will display
- Click the Upload button

### Upload Individuals

Add individuals in bulk to your program or practice.

Summary Information

Manage Individuals

Purchase Registrations

Transfer Registrations

Manage Addresses

View Reports

Product FAQ

Submit Request

Settings

#### ACR Medical School Program

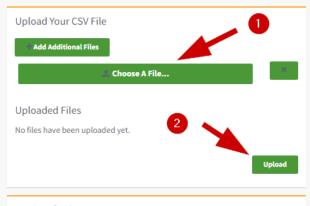
Training Site ID: 02356 ACR ID: 1234567

Return to Individual Management

Please download the sample file from HERE

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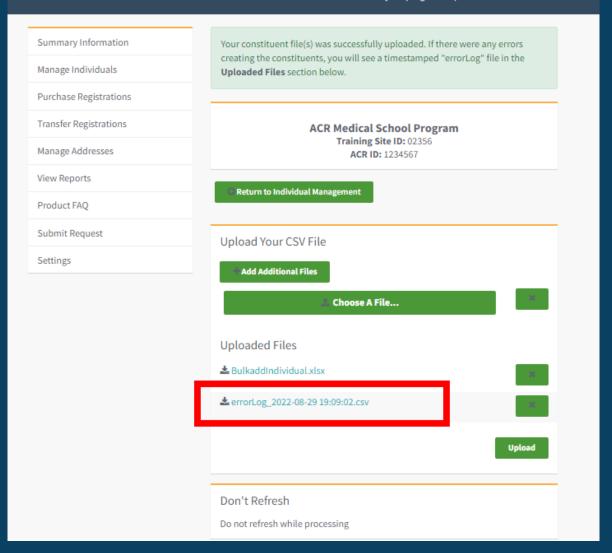
Don't Refresh

Do not refresh while processing

- Duplicate accounts will be identified in an error upload file
- Duplicate accounts must be merged by Membership
- Once the accounts are merged, you will receive notification to proceed to the next step

### Upload Individuals

Add individuals in bulk to your program or practice.



Step 2

Purchase the product/program(s) using Purchase Registrations

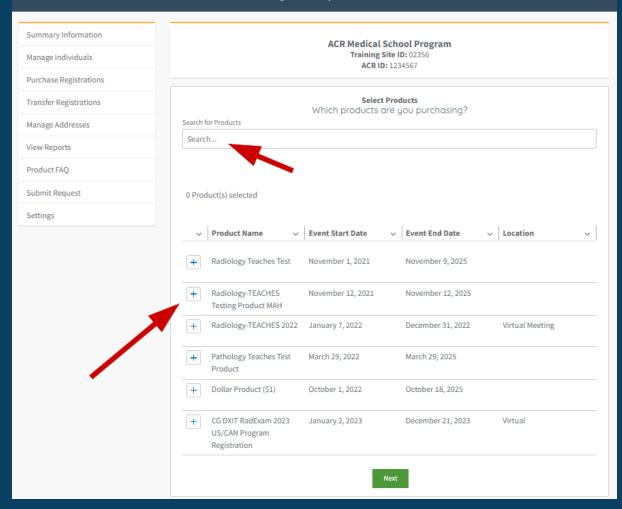


# Purchase Registrations

- Search for a product or click the + next to the product in the product list
- Click Next

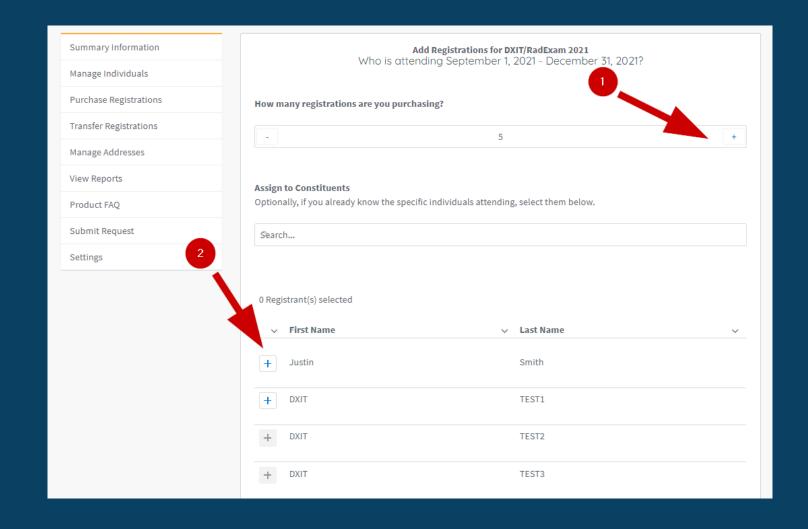
#### Purchase Registrations

Purchase registrations for your constituents



# Purchase Registrations

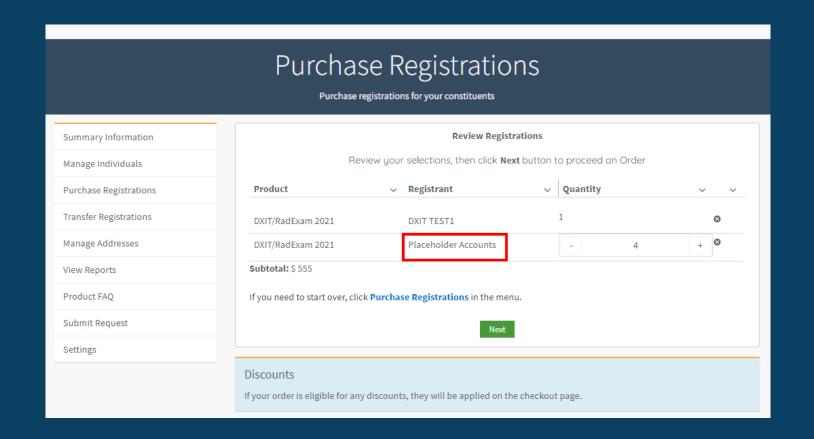
- Select the number of registrants for the program
- Assign registrants by clicking the + next to their name
- Click Next at the bottom





# Review Purchased Registrations

- You will see the list of registrants
- For unassigned slots, you will see them listed as "Placeholder Accounts".
- Placeholder accounts can be assigned at a later date



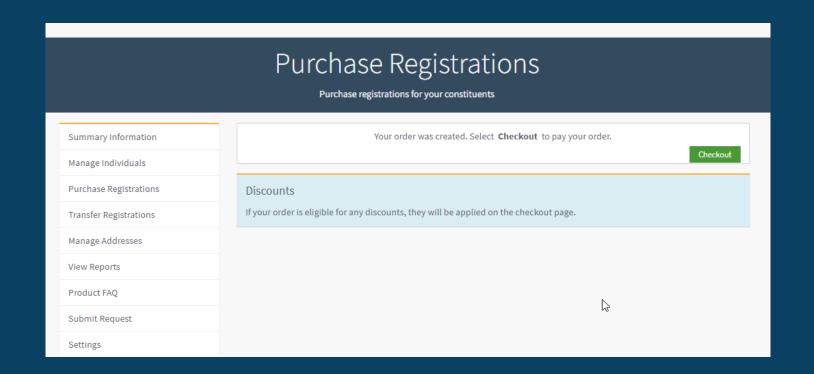
### Step 3

Payment

Free programs require that you purchase the product but do not require payment

# Checkout

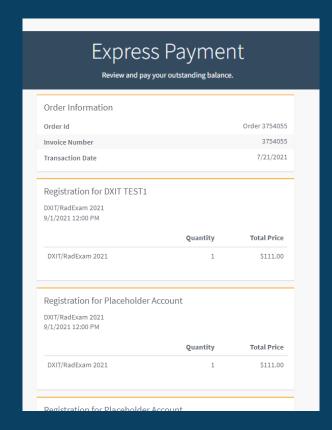
- Click Checkout
- Note that free programs do not require payment but still require you to click the "Checkout" button.



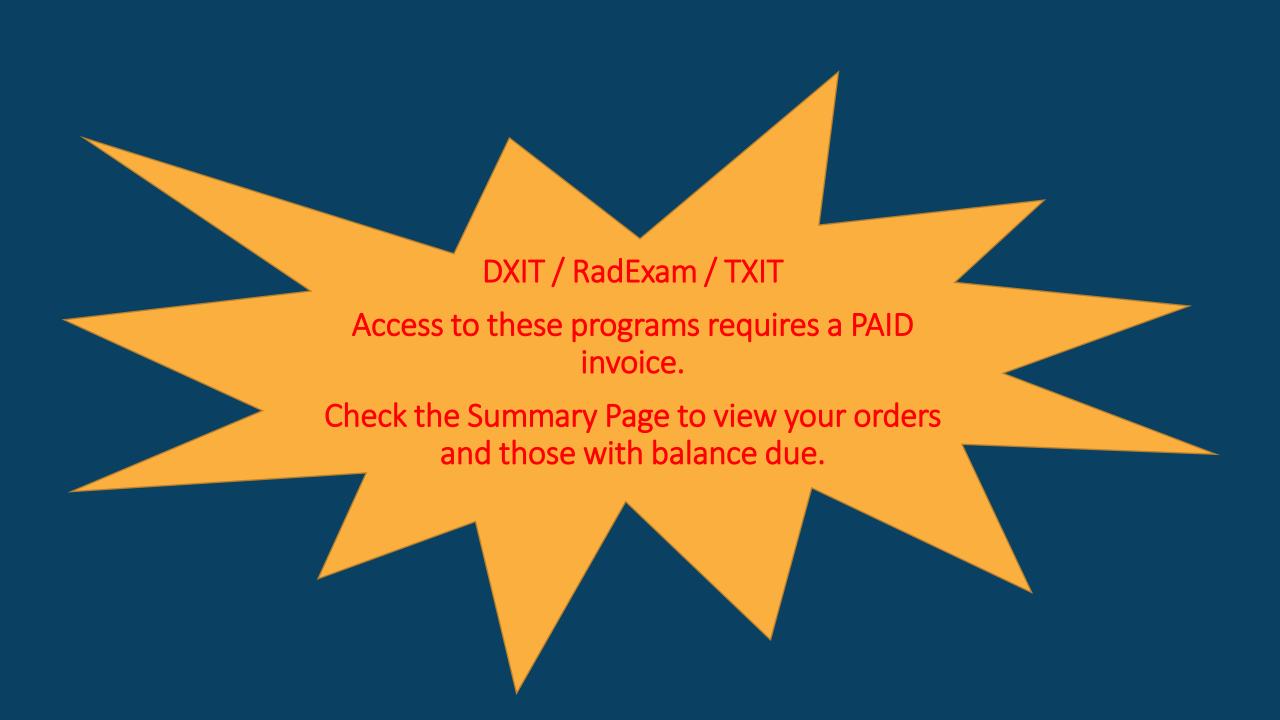
# Express Payment (Recommended)

- Review the order information
- Scroll down to payment type
- Add payment information
- Click Submit

Payment by check may delay access to the program

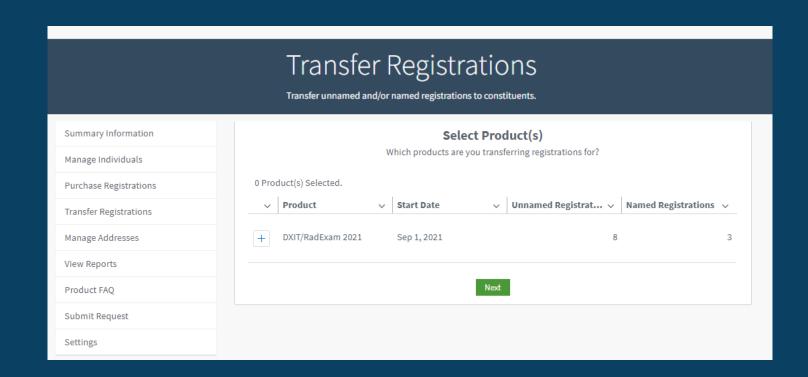


separated by commas in t	additional email(s) enter the email address( he Additional Emails field.	2S)
Confirmation Email *	js@acr1.com	
Additional Emails		
Payment Type		
Pay Now - Saved Pag	yment	
O Pay Now - New Cred	it Card	
	_	
	5	
ou don't have any payme	ent methods saved at this moment. You can if required, save it for future use.	pay
ou don't have any payme		pay
		pay
ou don't have any payme hrough a Credit Card and		



# Transfer / Assign Registrations

- ONLY AVAILABLE for certain products
- Allows you to transfer the slot to another registrant or assign registrants to the open registration slots
- Select the product by clicking the + next to the product then click Next



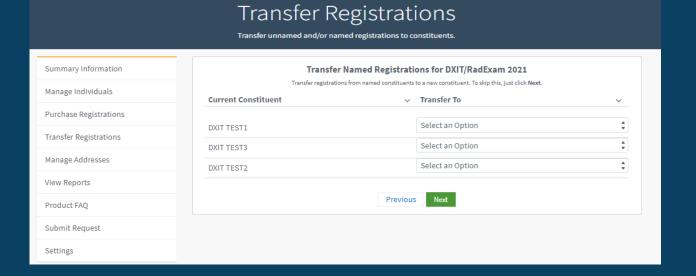
# Product Examples

• RadExam start date is July 1<sup>st</sup>. After July 1<sup>st</sup> transfer between residents cannot be done.



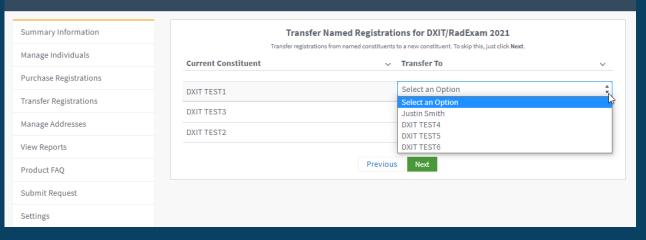
# Transfer Registrations

- Step 1 is transfer assign to unassigned open slots will be next the step
- First screen is to transfer an assigned registrant's slot to another registrant
- Use the drop down on the line for the registrant being replaced
- Select the new registrant from the drop-down list
- Click Next



### Transfer Registrations

Transfer unnamed and/or named registrations to constituents.



# Assign Registrations

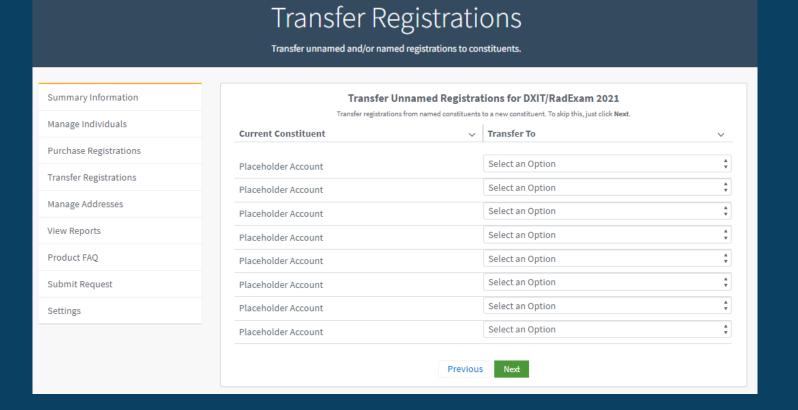
- Step 2 is to assign registrant(s) to open slots
- For open slot that have not yet been assigned, select the new registrant from the drop-down list
- Click Next

#### Transfer unnamed and/or named registrations to constituents. Summary Information Transfer Unnamed Registrations for DXIT/RadExam 2021 Transfer registrations from named constituents to a new constituent. To skip this, just click Next Manage Individuals **Current Constituent** Transfer To Purchase Registrations Select an Option Placeholder Account Transfer Registrations Select an Option Placeholder Account Manage Addresses Select an Option Placeholder Account View Reports Select an Option Placeholder Account Product FAQ Select an Option Placeholder Account Select an Option Submit Request Placeholder Account Select an Option Placeholder Account Settings Select an Option Placeholder Account Next Previous

Transfer Registrations

# Review Updated Registrations

- Step 3 is to review the changes made
- Click Finish



# Manage Addresses

 Allows you to enter / edit Billing and Delivery addresses

### Address Management

View and update addresses for your program or practice.

Summary Information	ACR DR Residency Program (PUB. Test)	
Manage Individuals	Training Site ID:	
Purchase Registrations		
Transfer Registrations	Primary Address	Edit
Manage Addresses	Specify which address is the main address.	
View Reports	Primary Address	Billing Address
Product FAQ	Billing Address	Edit
Submit Request	The address to use for invoices and payments.	
Settings	Billing Attention Line	Michele Huneke
	Billing Country Code	United States
	Billing Street	1891 Preston White Drive
	Billing City	Reston
	Billing State/Province Code	VA
	Billing Zip/Postal Code	20191
	Mailing Address	Edit
	Mailing Attention Line	
	Mailing Country Code	
	Mailing Street	
	Mailing City	
	Mailing State/Province Code	

# View Report

View registration details

### Reports

View informational tables about the program or practice you were viewing on the COM Dashboard.

Summary Information

Manage Individuals

Purchase Registrations

Transfer Registrations

Manage Addresses

View Reports

Product FAQ

Submit Request

Settings

Your program does not have any AIRP orders. A summary of each processed order will show up here.

Your program has no active, named registrants for any upcoming AIRP events. They will be listed here.

DXIT/RadExam Registrant Summary

Invoice Number	Transaction Date	DXIT/RadExam Quantity Purchased	DXIT/RadExam Residents Registered
3754055	7/21/2021	5	2
3021564	6/8/2021	1	1
3021565	6/8/2021	5	1

DXIT/RadExam Registrant Details

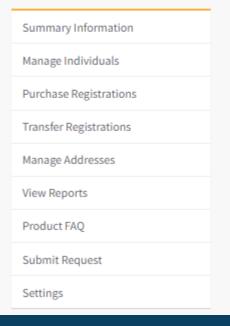
ACR Id	Full Name	Email	Eligibility Number
	DXIT TEST1	dt@aaa.org	13754055-0232881
	DXIT TEST4	dt4@aaa.org	13754055-0232882
	DXIT TEST3	dt3@aaa.org	13021564-0203732
	DXIT TEST2	dt2@aaa.org	13021565-0203733

# Product FAQ

 View FAQ pages for products

### Product FAQ

Get answers about the most frequently asked questions about ACR's products.



What product do you have questions about?

These are external links that will navigate you to acr.org in a new window/tab.

AIRP DXIT TXIT RADExam

Radiology-TEACHES

STARS

# Submit Request

 Submit a request for changing program information or add a new program

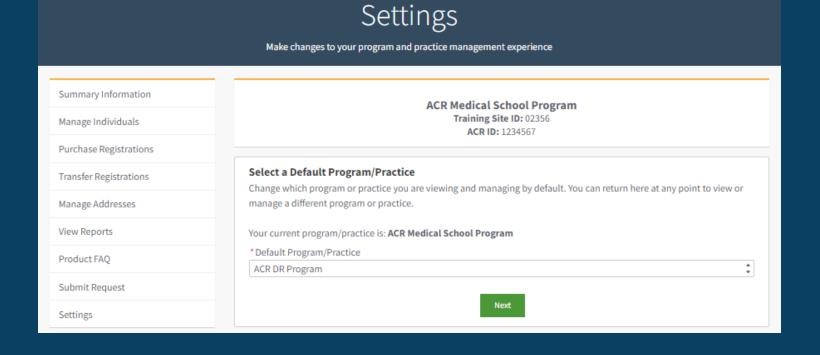
### Submit Request

Select the type of request you are making.

Summary Information	ACR Medical School Progr			
Manage Individuals	Training Site ID: 02356 ACR ID: 1234567			
Purchase Registrations				
Transfer Registrations	What Type of Request Are You Making?			
Manage Addresses	Change Program Name			
View Reports	Change Frogram Name			
Product FAQ	Create Program			
Submit Request				
Settings				

# Settings

 Change which program you are currently viewing



### Support

- AIRP registration and case submission <u>AIRPregistrations@acr.org</u> 800-373-2204
- ATPU <u>ATPU@acr.org</u> 800-334-7448 Option 3
- Membership and Member profile page membership@acr.org
- DXIT/TXIT registration intrainingexam@acr.org
- RadExam radexamsupport@acr.org
- Radiology-TEACHES and STARS radiologyteaches@acr.org
- ACR Education Center <u>edcentersupport@acr.org</u> 1-800-227-4630
- Online purchases and orders <u>productsupport@acr.org</u> 1-800-227-4630
- My Education LMS support@acr.org 1-888-469-5546