Program and Practice Management (PPM)

- Add / Edit Residents, Students and Faculty
- Register for ACR programs
- Make Payments and View Invoices
- 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 **SSO Dashboard**

or

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

Verify the program!
Summary Information for Resident Programs

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

<table>
<thead>
<tr>
<th>Product</th>
<th>Registrations Purchased</th>
<th>Trainees Registered</th>
<th>Special Request Submitted</th>
<th>Amount Billed</th>
<th>Amount Paid</th>
<th>Balance Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>DXIT/RadExam</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>$666.00</td>
<td>$111.00</td>
<td>$555.00</td>
</tr>
</tbody>
</table>

Need Help?
If you have any questions regarding registration payment or the registration process, please email info@acr.org.
Summary Information for Medical Student, PA and NP Programs

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

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

Step 1
Add the resident or student information using Manage Individuals

Step 2
Purchase and Assign the product/program(s) using Purchase Registrations

Step 3
Payment
NOTE: Free programs (Radiology-TEACHES and STARS) still require a zero-dollar purchase
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)
Edit / Update Constituents

Use the Action button to Edit/Update or Transfer/Remove an individual or staff account.
Add New Constituents

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

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

- Download the sample file for the data

You must use the approved upload format
Bulk Add Individuals

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
**Bulk Add Individuals**

**IMPORTANT** – save the completed spreadsheet as a CSV file format – NOT EXCEL
Bulk Add Individuals

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

- 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.
Step 2
Purchase the product/program(s) using Purchase Registrations

Free programs still require a zero-dollar purchase
Purchase Registrations

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

• Select the number of registrants for the program
• Assign registrants by clicking the + next to their name
• Click Next at the bottom
Don’t see their names?

New and Transfer residents and students will not display until approved by membership.

You may continue on but you will need to remember to register them once their accounts are approved.
Review Purchased Registrations

- You will see the list of registrants
- For unassigned slots, you will see them listed as “Placeholder Accounts” (not available for all products or programs)
- Placeholder accounts can be assigned at a later date
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
DXIT / RadExam / TXIT

Access to these programs requires a PAID invoice.

Check the Summary Page to view your orders and those with balance due.
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 1st. After July 1st transfer between residents cannot be done.

Transferring a registration is only available until the start date of the product.
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
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
Review Updated Registrations

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

• Allows you to enter / edit Billing and Delivery addresses
View Report

- View registration details
Product FAQ

- View FAQ pages for products
Submit Request

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

- Change which program you are currently viewing
Support

- AIRP registration and case submission - AIRPregistrations@acr.org - 800-373-2204
- Trainee Update (Previously ATPU) - TraineeUpdate@acr.org
- 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 - edcentersupport@acr.org – 1-800-227-4630
- Online purchases and orders - productsupport@acr.org – 1-800-227-4630
- My Education LMS - support@acr.org - 1-888-469-5546