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PtMS for Windows Help: Client Records

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Required Fields

The client record screen shots displayed here highlight the required and recommended fields.

Note: the **Client ID** is generally assigned automatically by PtMS, however, if the user has a unique identifier assigned to each client (for example Medicaid ID) and wants to use this value as the Client ID, the user can enter this directly into the Client ID field. Note: The Client ID is limited to 10 characters.

Fields highlighted in **yellow are required fields**. Fields highlighted in **green are recommended fields**.

PtMS - Client Records
 10/10/09 08:40:09
 091609-1400

PtMS For Windows - Clients

Client Info | Client Billing | Emerg Info /Certs | Agency Billing | Pickup Info | Sched Trips | Trip Hx | Options | View Providers

Client ID: 6 * Sex: M Intake Date: 07/18/02
 Last Name: JEFFERSON } *
 First Name: THOMAS } *
 MI: DOB: *
 Address 1: 86 E 5TH ST Language: Client Notes
 Address 2: Amb Status: AMB Merge Forms
 Zipcode: 19063 Disability: Escort: PCA: Cap Adj: Agencies: MED, ...
 State: PA County: Last User: Demo_User
 City: MEDIA Last Update: 07/23/09 @ 17:46 DB Rec ID: 4
 PHONE: (610)555-2221 * Ext: Type: *Enter data on a clear screen to search on these fields
 SSN: * Map Quest Export Client
 Med ID: *
 Other ID: *

Find Client | Clear Scrn | Edit Client | Add Client | Delete Client | Schedule Trip | GeoCode | Client CMN's | Quit

PtMS - Client Records
 10/10/09 09:01:20
 091609-1400

PtMS For Windows - Clients

Client Info | Client Billing | Emerg Info /Certs | Agency Billing | Pickup Info | Sched Trips | Trip Hx | Options | View Providers

At least 1 revenue code line of agency, funding and purpose code must be entered.

Revenue ID	Agency	Funding	Purpose	Tripcode	AS	Exp Date	Amt Auth	AT	Cur Pd	Prev Pd	Del
▼	MED ▼	MED ▼	MED ▼	▼							X
▼	▼	▼	▼	▼							X
▼	▼	▼	▼	▼							X
▼	▼	▼	▼	▼							X
▼	▼	▼	▼	▼							X

Misc: _____

Client: JEFFERSON, THOMAS (6)

Find Client | Clear Scrn | Edit Client | Add Client | Delete Client | Schedule Trip | GeoCode | Client CMN's | Quit

PtMS - Client Records

10/10/09 10:33:50
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info Sched Trips Trip Hx Options View Providers

Pickup Place: 86 E 5TH ST
 Pickup Zone: 502499 Zone Name: DELAWARE COUNTY
 Pickup Info: 86 E 5TH ST
 Additional:
 Driver's Inst: Assist client into vehicle
 City of Resi: GIS X: 1205660213 GIS Y: 1034931168 GeoCode Client
 DWELL: GIS Lat: 39 9219363703832 GIS Lon: -75 3869171099562
 Does client own vehicle?: Can friend or relative drive client?:
 Race: Marital Status: Family Inc: Inc Source: No. in HH: Head HH Type:
 Head HH Name: Service Mode: SPR
 Signature Type: Unkno Print Notepad Pickup Notes?:
 Client: JEFFERSON,THOMAS (6)

Find Client Clear Scrn Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

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Screen Navigation

Client Records use a tabbed form for accessing the sections of the client record. Click on the tab at the top of the form to select the specific data section for display or editing.

Click on the **"Edit Client"** button to place the record in edit mode to make changes to the record. Click on **"Save Client"** button to save any changes to the client record.

The **"Client CMN"**(Client Medical Necessity Certification) button and the **"Schedule Trip"** button on the tool bar at the bottom of the Client Records form open new windows for entering CMN or Service Request information.

The "Options" tab at the top of the Client Record provides access to scheduling and other data entry and monitoring functions. "View Providers" lists the available providers in PtMS.

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Creating a New Client Record

To create a new client record follow these steps:

Clear the screen of existing client information by clicking on the **"Clear Scrn"** button on the bottom toolbar

Click on the **"Add Client"** button on the bottom toolbar - this will display a popup window.

Enter Last Name and First Name, Date of Birth is recommended, other fields are optional. Click on **"Verify Client"** to confirm the client is not entered already in PtMS or another client does not have the same SSN or Medicaid ID.

Click **"Save New Client"** to create the client record and display the record in the **"Client Info"** window.

PtMS For Windows

Add New Client

Client ID:

Last Name:

First Name:

DOB:

SSN:

Med ID:

Client ID will be generated by PtMS.
Client SSN is missing!
Medid is missing!

Has Critical Errors Has Warnings

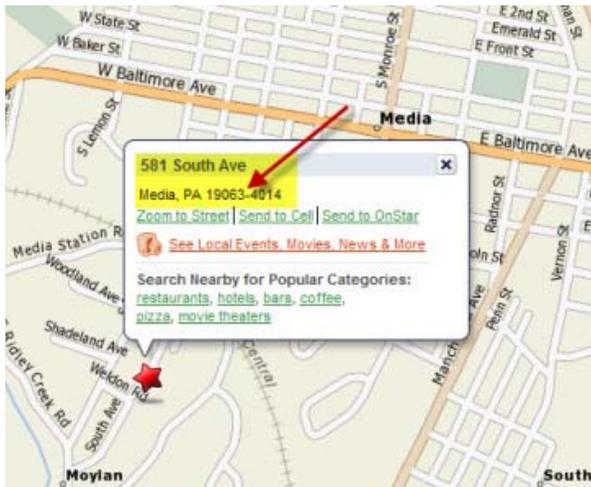
Items with a ">" must be corrected for client to save.

Cancel Save New Client Reset

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Geocoding

Enter the client's address information on the "**Client Info**" window. Make sure to include zipcode. If you are not sure of the zipcode for an address enter the address information then click on the "**Map Quest**" button. This will display the address on a Map Quest map in a separate window. The address information along with the zipcode will be displayed.



Next click on the "**Pickup Info**" tab then click on the "**Geocode Client**" button. This will display the geocoding window.

PtMS - Client Records
10/10/09 21:16:27
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info Sched Trips Trip Hx Options View Providers

Pickup Place: 581 South Ave
Pickup Zone: Zone Name:

PtMS For Windows - Geocode Function
PtMS - Geocode

Address: 581 South Ave
City: MEDIA
State: PA Zipcode: 19063 Secs:

GeoCode Client

Primary Result		Secondary Result	
Gis X:		Gis X:	
Gis Y:		Gis Y:	
Lat:		Lat:	
Lon:		Lon:	
Zone:		Zone:	

Use Primary Result

Geocode (Streets) Geocode (MapQuest) Update Get Manual X,Y MapQuest Close

Click on "**Geocode (Streets)**" or "**Geocode (MapQuest)**", both will return the address Latitude/Longitude and X,Y map coordinates. However, the Streets option will only work for addresses for the displayed maps. The MapQuest option will work for any address in the US. Note: users can edit any address information in the geocoding window and this will not change the address information in the client record. Sometimes apartment numbers or other extra information needs to be removed from the address line to get an accurate geocoding result.

Once the geocoding results are displayed click on "**Update**" to close the geocoding Window and update the client record "Latitude/Longitude and X,Y" fields. Click on "**Save Client**" to save the geocoding results and any other edits made to the client record.

PtMS - Client Records
10/10/09 21:30:00
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info Sched Trips Trip Hx Options View Providers

Pickup Place: 581 South Ave
Pickup Zone: 496497 Zone Name: DELAWARE COUNTY

PtMS For Windows - Geocode Function
PtMS - Geocode

Address: 581 South Ave
City: MEDIA
State: PA Zipcode: 19063 Secs:

GeoCode Client

Primary Result		Secondary Result	
Gis X:	1205622081	Gis X:	
Gis Y:	1034793188	Gis Y:	
Lat:	39.912711	Lat:	
Lon:	-75.393237	Lon:	
Zone:	496497	Zone:	

Use Primary Result

Geocode (Streets) Geocode (MapQuest) Update Get Manual X,Y MapQuest Close

581 South Avenue
Media
Delaware
PA
US
19063-4014
39.912711
-75.393237

Clear Scrn Save Client Delete Client Schedule Trip GeoCode Client CMN's

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Pickup Information

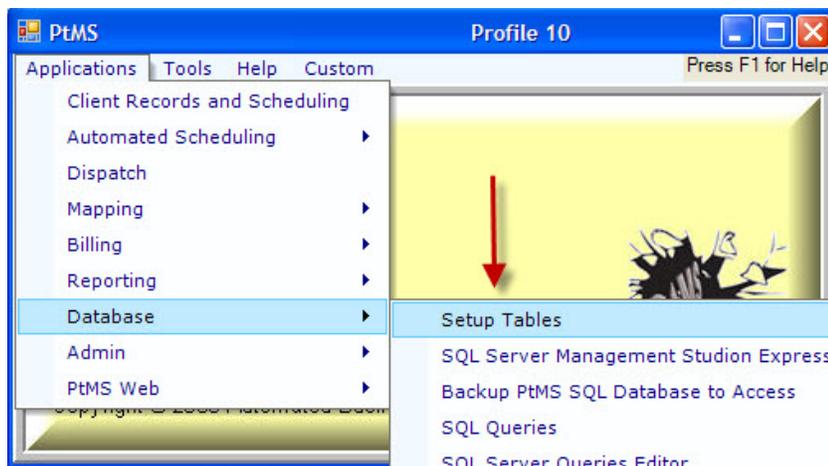
The Pickup Information window allows users to enter additional pickup information for the driver as well as client demographic information.

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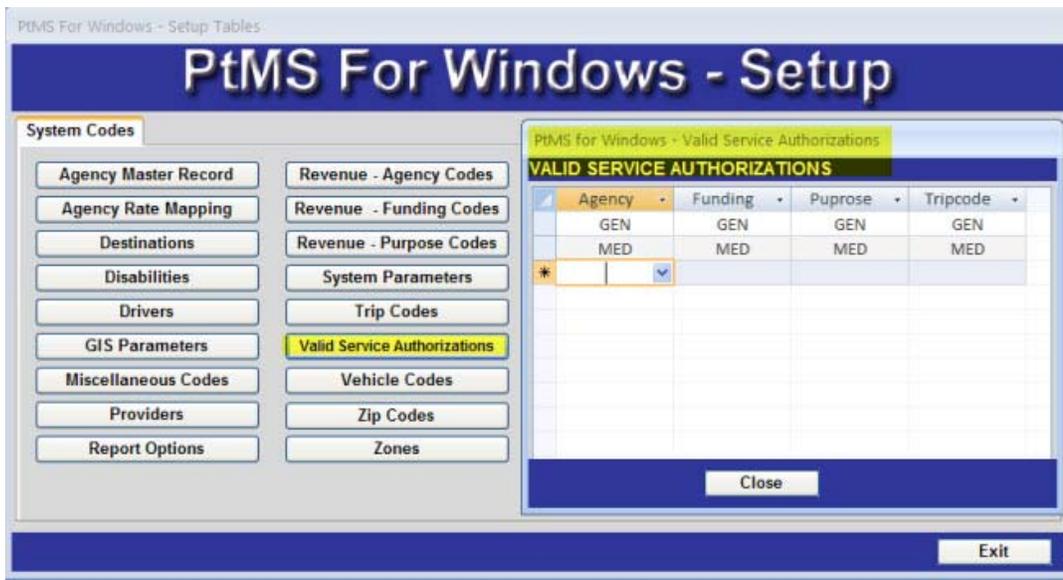
Agency Billing

The Agency Billing window is where the revenue codes assigned to a specific client record are stored. Revenue codes refer to the combination of Agency, Funding, Purpose and Tripcodes that detail what agency or program is sponsoring or paying for a scheduled trip, for what purpose, at what trip rate (cost) including client boarding fares or co-payments.

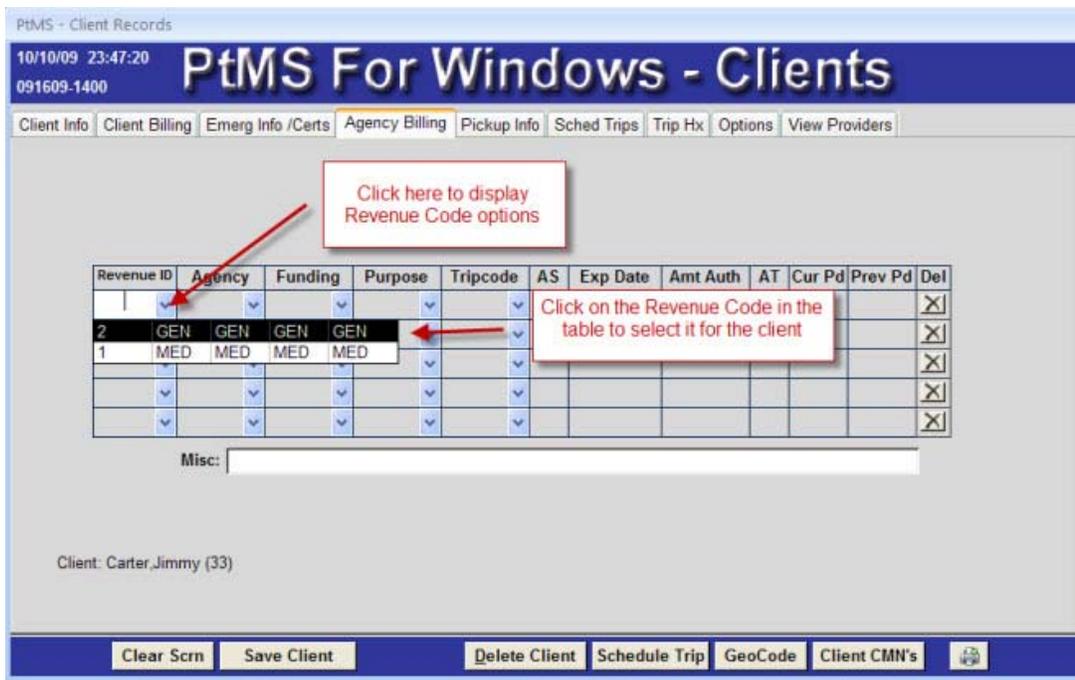
Agency, Funding, Purpose, and Tripcodes are entered using the PtMS setup module. Setup can be accessed from the PtMS Menu by selecting Applications/Database/Setup.



Once Agency, Funding, Purpose and Tripcodes have been entered into their respective tables, they must be combined into revenue codes and entered into the Valid Service Authorizations table.



When users enter Revenue Codes in the client record, they are selecting from the list of Valid Service Authorizations entered into PtMS. To enter a new revenue code in a client record, click on the "Agency Billing" tab then click on the "Revenue ID" drop box arrow to select a revenue code for the client record.



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Scheduled Trips

The Scheduled Trips window displays current standing order or "routine" trips scheduled for a client and all future demand trips scheduled for a client.

PtMS - Client Records

10/10/09 23:56:57
091609.1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

T/R	E	Pickup Location	PU	Destination	Drop	DIR	Veh	Date	Day	Stop	Start	
T		Granite Run Mall	09:00	RIDDLE MEMORIAL HOSPIT	09:10	R	F1A	ROUTINE	MON			
T		RIDDLE MEMORIAL HOSPIT	09:15	Media Post Office	09:25	R	F1A	ROUTINE	MON			
T		Media Post Office			09:35	R	F1A	ROUTINE	MON			
T		Springfield Mall			09:45	R	F1A	ROUTINE	MON			
T		SPRINGFIELD HOSPITAL			09:55	R	F1A	ROUTINE	MON			
T		Healthplex Sports Club			10:10	R	F1A	ROUTINE	MON			
T		Lawrence Park Shopping C			10:25	R	F1A	ROUTINE	MON			
T		Newtown Square Shopping C	10:30	Delaware County Community	10:35	R	F1A	ROUTINE	MON			
T		Delaware County Community	10:40	Granite Run Mall	10:55	R	F1A	ROUTINE	MON			
T		Granite Run Mall	09:00	RIDDLE MEMORIAL HOSPIT	09:10	R	F1A	ROUTINE	TUE			
T		RIDDLE MEMORIAL HOSPIT	09:15	Media Post Office	09:25	R	F1A	ROUTINE	TUE			
T		Media Post Office	09:30	Springfield Mall	09:35	R	F1A	ROUTINE	TUE			
T		Springfield Mall	09:40	SPRINGFIELD HOSPITAL	09:45	R	F1A	ROUTINE	TUE			
T		SPRINGFIELD HOSPITAL	09:50	Healthplex Sports Club	09:55	R	F1A	ROUTINE	TUE			
T		Healthplex Sports Club	10:00	Lawrence Park Shopping Cer	10:10	R	F1A	ROUTINE	TUE			
T		Lawrence Park Shopping Cer	10:15	Newtown Square Shopping C	10:25	R	F1A	ROUTINE	TUE			

= Cx/Suspended
 = Deleted
 = Escorts
 = Routine Delayed Start

Refresh Print Trips

Client: Route.Fixed (32) Double click on date to view Cx/Suspension options.

Find Client Clear Scrn Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

Users can open any scheduled trip by clicking on the "trip detail" icon. Edits made on the trip detail window must be saved by pressing the "Save Changes" button.

PtMS - Client Records

10/11/09 00:01:10
091609.1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

Vehicle Manifest Trip Edit for >>Route, Fixed (32) - Trip ID:35 - Date:ROUTINE

Vehicle: F1A Day: MON 1 Client ID: 32 Prov: FXD Take Or Return: T Trip ID: 35
 Last Name: Route First Name: Fixed Updated: 5/8/2009 23:35 Demo User
 Date: ROUTINE Trip Code: GEN Fare: Amb Status: AMB
 Agency: GEN Funding: GEN Purpose: GEN Stop Date: Start Date:
 Pickup: Springfield Mall Time: 09:40 Zone: 501519 Loc: 19064.SPRINGFIELD X: 1206060432
 Y: 1034896894
 Dest: SPRINGFIELD HOSPITAL Time: 09:45 Zone: 503519 Loc: 19064.SPRINGFIELD X: 1206062662
 Y: 1034936602
 Drv Instr: Run:
 Req Date: Req Time: Req User: Def Vehicle: 999 Def Pickup Time: 09:40 Def Drop Time: 09:45
 Pickup Address: Destin Address:
 Escort: N Escort Fare: Verified: Status: Status Desc: Miles: 1 Modifier:
 Ref Number: Ref Start: 5/8/2009 Ref End: 5/8/2009 Renew
 Notes:
 Client Comment:

Close Save Changes UnSuspend Delete Trip Calc Miles

Find Client Clear Scrn Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

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Trip History

The Trip History window displays a complete listing of all trip transaction records for a client stored in the trip transactions table.

PtMS - Client Records

10/11/09 00:22:59
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info Sched Trips **Trip Hx** Options View Providers

Trip Date	Veh	Esc	T/R	PU Tm	Pickup Location	Drop Tm	Destination	Status	D/R
08/24/09	F1A		T	09:00	Gr	09:10	RIDDLE MEMORIAL HOSPITA	Y	R
08/24/09	F1A		T	09:15	RID	09:25	Media Post Office	Y	R
08/24/09	F1A		T	09:30	Me	09:35	Springfield Mall	Y	R
08/24/09	F1A		T	09:40	Springfield Mall	09:45	SPRINGFIELD HOSPITAL	Y	R
08/24/09	F1A		T	09:50	SPRINGFIELD HOSPITAL	09:55	Healthplex Sports Club	Y	R
08/24/09	F1A		T	10:00	Healthplex Sports Club	10:10	Lawrence Park Shopping Cent	Y	R
08/24/09	F1A		T	10:15	Lawrence Park Shopping Cent	10:25	Newtown Square Shopping Ce	Y	R
08/24/09	F1A		T	10:30	Newtown Square Shopping Ce	10:35	Delaware County Community	Y	R
08/24/09	F1A		T	10:40	Delaware County Community	10:55	Granite Run Mall	Y	R

Client: Route.Fixed (32)

Find Client Clear Scrn Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

Users can open any trip transaction record for a client by clicking on the "trip transaction detail" icon. All edits made on trip transaction records are saved automatically when the user closes the trip transaction detail window.

PtMS For Windows - Edit Trip Transaction

Trip Transaction Edit 070709-1445 Trip Transaction ID: 16

ClientID: 32	Pickup: Springfield Mall	Rate:
Last Name: Route	Pickup Time - Sched: 09:40	Fare:
First Name: Fixed	Pickup Time - Actual:	Open Invoice:
Tripdate: 8/24/2009	Destination: SPRINGFIELD HOSPITAL	Invoice Amount:
Provider: FXD	Drop Time - Sched: 09:45	Payment Amount:
Sched Vehicle: F1A	Drop Time - Actual:	Credit Amount:
Actual Vehicle:	Ambulatory Status: AMB	Writeoff Amount:
Agency: GEN	Odometer - On:	Balance:
Funding: GEN	Odometer - Off:	Miles: 1
Purpose: GEN	Special Status:	Driver:
Tripcode: GEN	PickupZone:	Run Web Verify:
Take/Return: T	DropZone:	Verified: U
Dem/Routine: R	Proced Modifier:	Status: Y
Reference Number:	Invoice Number:	Status Desc:
Renew <input type="checkbox"/>	Transaction Number: 665	Req Date:
General Note:		Req Time:
Billing Note:		Req User:
Driver Instructions:		Updated:
		Update Time:
		Last User:

From Date: Apply Date Calc Miles Close

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Client Notes

Clients notes opens a text document for each client in the PtMS Client Notes folder. The text document is automatically named "ClientID.TXT" where "ClientID" is the clientid field value in the client's record, and opens automatically when the users clicks on the "Client Notes" button.

A time and date entry is made each time the client notes field is entered. Users should enter their new notes below

the new time and date entry. You must click on File/Save to save the new notes that are keyed or pasted into the client's note file. Finally, the notefile must be close be click on the "X" in the top right corner or click File/Exit.

PtMS - Client Records
10/10/09 18:57:37
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info Sched Trips Trip Hx Options View Providers

Client ID: 6 * Intake Date: 07/18/02
Last Name: JEFFERSON
First Name: THOMAS
MI: *
Address 1: 86 E 5TH ST
Address 2: *
Zipcode: 19063
State: PA County: *
City: MEDIA *
PHONE: (610)555-2221 * Ext: * Type: *
SSN: *
Med ID: *
Other ID: *

Agencies: MED, , , ,
Last User: Demo_User
Last Update: 07/23/09 @ 17:46 DB Rec ID: 4

*Enter data on a clear screen to search on these fields

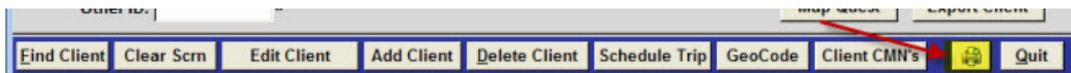
Client Notes
Merge Forms
Map Quest
Export Client

Clear Scrn Save Client Delete Client Schedule Trip GeoCode Client CMN's

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Print a Client Record Summary

To print a summary of the client record click on the print icon on the bottom tool bar on the client record.



This will display a print preview summary of the client record. Click on the printer button, select your printer options and click OK to send the report to the printer.

RepClientRecord

Client Record Summary

JEFFERSON, THOMAS - Client ID: 6

Address: 86 E 5TH ST	Sex: M
MEDIA, PA 19063	DOB:
Telephone: (610)655-2221 Ext:	Race:
Soc Security #:	Language:
Medical ID:	WC/Amb: AMB
Emergency Contact:	Disability:
Case Manager:	Phone:
Physician N:	Phone: Ext:
Physician License #:	Phone: Ext:
Certified By:	Cert Lic #:
Comment:	Cert Date:

Driver Instructions: Assist client into vehicle

Bill To:

Bill To Address:

Bill To Phone:

Pickup Place: 86 E 5TH ST
86 E 5TH ST

Zone Code: 502499 Zone Name: DELAWARE C

Latitude, Longitude: 1205660213, 1034931168
GIS X, Y: 1205660213, 1034931168

	Take Trips	Return Trips	Cancel	No Shows
Current:	0	0	0	0
Intake to Date:	0	0	0	0

Revenue Codes				
Agnt	Fnd	Purp	TC	Expiration
MED	MED	MED		

Record Status:

Page: 1 Filtered

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Print all Scheduled Trips for a Client

To print a summary of all scheduled trips for a client, select the "Scheduled Trips" tab, then click the "Print Trips" button.

PtMS - Client Records

10/11/09 01:18:31
091609-1400

PtMS For Windows - Clients

Client Info | Client Billing | Emerg Info /Certs | Agency Billing | Pickup Info | **Sched Trips** | Trip Hx | Options | View Providers

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	Stop	Start
T		Granite Run Mall	09:00	RIDDLE MEMORIAL HOSPIT	09:10	R	F1A	ROUTINE	MON		
T		RIDDLE MEMORIAL HOSPIT	09:15	Media Post Office	09:25	R	F1A	ROUTINE	MON		
T		Media Post Office	09:30	Springfield Mall	09:35	R	F1A	ROUTINE	MON		
T		Springfield Mall	09:40	SPRINGFIELD HOSPITAL	09:45	R	F1A	ROUTINE	MON		
T		SPRINGFIELD HOSPITAL	09:50	Healthplex Sports Club	09:55	R	F1A	ROUTINE	MON		
T		Healthplex Sports Club	10:00	Lawrence Park Shopping Cer	10:10	R	F1A	ROUTINE	MON		
T		Lawrence Park Shopping Cer	10:15	Newtown Square Shopping C	10:25	R	F1A	ROUTINE	MON		
T		Newtown Square Shopping C	10:30	Delaware County					INE	MON	
T		Delaware County Community	10:40	Granite Run Mall					INE	MON	
T		Granite Run Mall	09:00	RIDDLE MEMOR					INE	TUE	
T		RIDDLE MEMORIAL HOSPIT	09:15	Media Post Office					INE	TUE	
T		Media Post Office	09:30	Springfield Mall					INE	TUE	
T		Springfield Mall	09:40	SPRINGFIELD HOSPITAL	09:45	R	F1A	ROUTINE	TUE		
T		SPRINGFIELD HOSPITAL	09:50	Healthplex Sports Club	09:55	R	F1A	ROUTINE	TUE		
T		Healthplex Sports Club	10:00	Lawrence Park Shopping Cer	10:10	R	F1A	ROUTINE	TUE		
T		Lawrence Park Shopping Cer	10:15	Newtown Square Shopping C	10:25	R	F1A	ROUTINE	TUE		

■ = Cx/Suspended
 ■ = Deleted
 ■ = Escorts
 ■ = Routine Delayed Start

Client: Route,Fixed (32) Double click on date to view Cx/Suspension options.

This will display a print preview summary of the scheduled trips for the selected client record. Click on the printer button, select your printer options and click OK to send the report to the printer.

RepClientTrips

Schedule Client Trips
Route, Fixed - ID #:32

ROUTIN	MON	F1A		R	T	09:00	Granite Run Mall MEDIA, PA, 19063	09:10	RIDDLE MEMORIAL HOSPITAL .PA, 19063	1	AMB	GEN	GEN	(610)966-9400
ROUTIN	MON	F1A		R	T	09:15	RIDDLE MEMORIAL HOSPITAL MEDIA, PA, 19063	09:25	Media Post Office .PA, 19063	3	AMB	GEN	GEN	
ROUTIN	MON	F1A		R	T	09:30	Media Post Office MEDIA, PA, 19063	09:35	Springfield Mall .PA, 19064	2	AMB	GEN	GEN	
ROUTIN	MON	F1A		R	T	09:40	Springfield Mall Springfield, PA, 19064	09:45	SPRINGFIELD HOSPITAL .PA, 19064	1	AMB	GEN	GEN	(610)328-7809
ROUTIN	MON	F1A		R	T	09:50	SPRINGFIELD HOSPITAL SPRINGFIELD, PA, 19064	09:55	Healthplex Sports Club .PA, 19064	1	AMB	GEN	GEN	(610)328-8888
ROUTIN	MON	F1A		R	T	10:00	Healthplex Sports Club Springfield, PA, 19064	10:10	Lawrence Park Shopping Center .PA, 19008	3	AMB	GEN	GEN	
ROUTIN	MON	F1A		R	T	10:15	Lawrence Park Shopping Center BROOMALL, PA, 19008	10:25	Newtown Square Shopping Cente .PA, 19073	3	AMB	GEN	GEN	
ROUTIN	MON	F1A		R	T	10:30	Newtown Square Shopping Cente NEWTOWN SQUARE, PA, 19073	10:35	Delaware County Community Coll .PA, 19063	1	AMB	GEN	GEN	
ROUTIN	MON	F1A		R	T	10:40	Delaware County Community Coll MEDIA, PA, 19063	10:55	Granite Run Mall .PA, 19063	4	AMB	GEN	GEN	
ROUTIN	TUE	F1A		R	T	09:00	Granite Run Mall MEDIA, PA, 19063	09:10	RIDDLE MEMORIAL HOSPITAL .PA, 19063	1	AMB	GEN	GEN	(610)966-9400
ROUTIN	TUE	F1A		R	T	09:15	RIDDLE MEMORIAL HOSPITAL MEDIA, PA, 19063	09:25	Media Post Office .PA, 19063	3	AMB	GEN	GEN	
ROUTIN	TUE	F1A		R	T	09:30	Media Post Office MEDIA, PA, 19063	09:35	Springfield Mall .PA, 19064	2	AMB	GEN	GEN	
ROUTIN	TUE	F1A		R	T	09:40	Springfield Mall Springfield, PA, 19064	09:45	SPRINGFIELD HOSPITAL .PA, 19064	1	AMB	GEN	GEN	(610)328-7809
ROUTIN	TUE	F1A		R	T	09:50	SPRINGFIELD HOSPITAL SPRINGFIELD, PA, 19064	09:55	Healthplex Sports Club .PA, 19064	1	AMB	GEN	GEN	(610)328-8888
ROUTIN	TUE	F1A		R	T	10:00	Healthplex Sports Club Springfield, PA, 19064	10:10	Lawrence Park Shopping Center .PA, 19008	3	AMB	GEN	GEN	
ROUTIN	TUE	F1A		R	T	10:15	Lawrence Park Shopping Center BROOMALL, PA, 19008	10:25	Newtown Square Shopping Cente .PA, 19073	3	AMB	GEN	GEN	

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Monitoring Expired Revenue Codes

Revenue Codes entered on the client record "**Agency Billing**" window have an option "**Expired Date**" field where the user can enter an expiration date for the Revenue Code. The "**Expiring Revenue Codes**" browse lists all clients with revenue codes due to expire within 30 days of today's date or revenue codes that have already expired. Clients are listed alphabetically with each line in the table representing a separate revenue code due to expire for a client. Click on any client name and the client record will be loaded and the user placed directly on the "**Agency Billing**" client record window.

PtMS - Client Records

10/11/09 21:37:31
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info Sched Trips Trip Hx **Options** View Providers

Scheduling User Options

Vehicle Manifest Edit
Assign Vehicle/Drivers
Transfer Trip Trans to Sched

Destinations
Expiring CMNs
Expiring Revenue Codes
Group Trips

Clients With Expiring Revenue Codes

Expiring Clients Codes - 30 Days or Less

Client Name	Client ID	Agn	Fund	Purp	TC	Exp Date
WASHINGTON GEORGE	2	MED	MED	MED	MED	10/31/09
WASHINGTON GEORGE	2	GEN	GEN	GEN	GEN	10/31/09

Click on a client name to display the client record

Close

End Client Clear Scrn Edit Client Add Client Schedule Trip GeoCode Client CMN's Quit

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