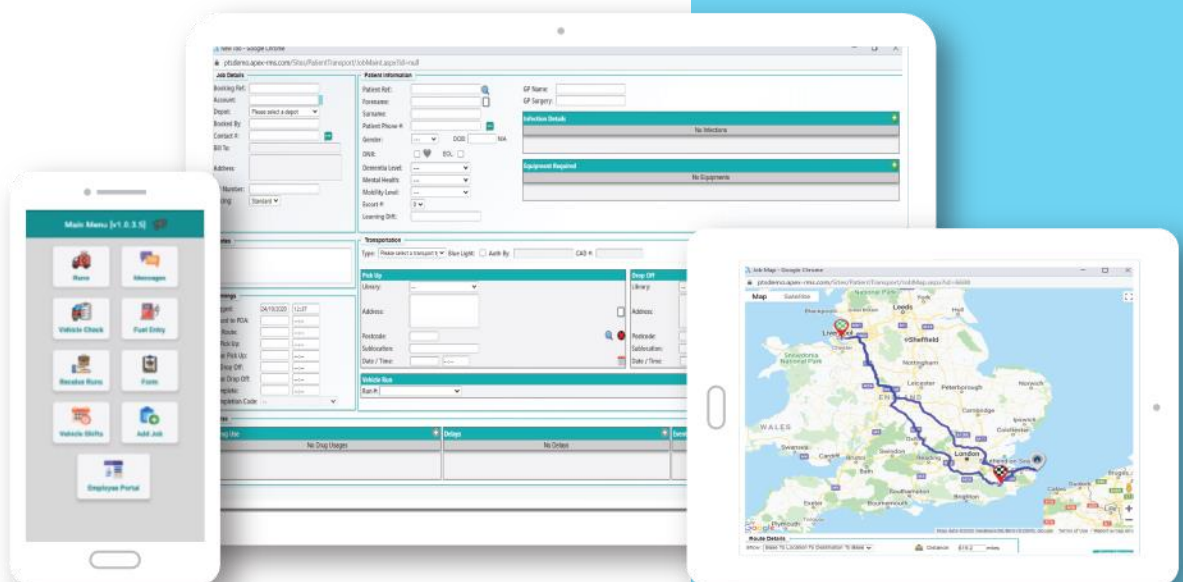


Patient Transport Software Set Up Guide V2.1 - September 2021



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Overview

This document aims to take you through the entire set up process of the Apex Patient Transport Software (PTS), to be followed sequentially from start to finish before your system can go live. There are several links to external resources from this document, these should be used where applicable as they provide further relevant information.

Download the PTS Client

The Apex Web Client can be downloaded from our website the following link:

<https://www.apex-networks.com/pts-resources>

Scroll down to Installation files.

Click on the Apex Web Client download item. Once the Web Client has been installed and you run it for the first time, you will need to enter your unique 6-digit installation code that was provided by Apex.

Please make sure that your PCs meet the minimum specifications detailed in the Workstation Setup Guide that can be downloaded from the page above.

Download and Install the Android® PDA Software

On your Android® device, open a web browser and navigate to the following link: <http://ptsandroid.apex-rms.com>. You will be prompted to download the APK file. Once the file has downloaded, click to install the file. Some security prompts will appear, simply agree to all of them. The app will then prompt for your 6-digit install code then will connect to the server. The device will be ready to use the PTS system. This is covered later in the document.

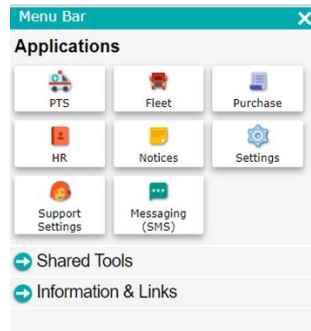


Unregistered PDA

Log in to PTS

Your system will have been built with a single user already set up for the main contact specified on the order form. The user login will consist of the first letter of your forename followed by your surname. For example, Alice Smith will have a user setup as 'asmith'. The password is defaulted to 'password' but will be required to change upon first login.

Open the client and enter the credentials to log in, you'll then be faced with the main menu and you'll be able to continue with the setup. If you have any issues with logging in, then please contact our support team and we'll provide assistance.



The PTS Main Menu

Core System Setup

There are several items that need setting up before you can use the PTS software, these are mandatory and cannot be missed out. Please follow this section and complete each item in order.

Roles and Permissions

Users in RMS are granted permissions to access different parts of the system. The way this works is that for each module in PTS there are several roles and each role has several permissions assigned to it. A role is then applied to a user, this means that each user gets to inherit all the permissions set for that role. You can create more roles as required.

From the main menu click 'System Setup' then select 'Applications & Roles'. Locate the application that you would like to see the permissions for and then click the 'Set Permissions...' button. This will show a grid, down the left side of the grid are the permissions and along the top are the roles. You can set a permission by simply checking or un-checking the required checkbox. Once you have set all the permissions in all the applications, you'll be able to assign a role to a user. We have created a default set of roles for you.

Application	Description	Manage Roles	Set Permissions
Settings	Settings (Company information, Users, Suppliers, etc..)	Manage Roles...	Set Permissions...
Purchase Manager	Purchase Order System	Manage Roles...	Set Permissions...
Fleet Manager	Management of fleet vehicle	Manage Roles...	Set Permissions...
SMS Gateway	Text message sending system	Manage Roles...	Set Permissions...
HR Manager	Human Resources Management	Manage Roles...	Set Permissions...
Patient Transport System	Movement of Patients	Manage Roles...	Set Permissions...

Setting permissions

System Users

To use the PTS control room software, it requires a user login to be set up. To set up additional users navigate to the 'Users' section in System Setup (available from the main menu). You can either set up a new user from scratch by clicking the 'New User' button or open an existing one and click the 'Copy' button, which will copy the existing user's roles across to the new user.

Enter the required information and click the created button. The system will tell you if you missed out any mandatory information. If you are creating a new user from scratch, then you can now click into the 'Roles' tab and assign roles for each module in the system. Then click save to finalise.

Login	Name	Main Site	Telephone	Email	Last Login
em	Evan Humphreys	APEX 1			03/09/2019 11:56:19
am	Andy Marks	APEX 1	0203 1856757	amarks@apex-networks.com	10/09/2019 08:55:59
al	Ava Lane	APEX 1			29/10/2020 16:56:39
bm	Bernard Morfot	APEX 1		bmorfot@apex-networks.com	10/09/2019 09:24:07
da	Dan Atbeck	APEX 1		datbeck@apex-networks.com	10/09/2019 07:03:48
ja	Joseph Gordon	APEX 1			
gd	Graham Dickson	APEX 1		graham.dickson@nhs.uk	30/01/2020 18:57:25
bs	Beth Sanderson	APEX 1			09/09/2019 18:49:35
fd	Freya Doyle	APEX 1			06/10/2020 10:35:15
ro	Rose	APEX 1		rmay@apex-networks.com	28/09/2020 17:06:20
tb	Thomas Bowles	APEX 1		thomas.bowles@nhs.uk	
mb	Millie Baldwin	APEX 1			19/02/2020 10:19:49

User Details

[Watch the Video Here](#)

Drivers (Crew Members)

From the main menu of PTS select 'System Setup' then 'Drivers' to view a list of all drivers currently in the system. To create a new driver, click the 'New Driver' button and fill in the required information before clicking the Save button to complete, the system will tell you if you miss out any mandatory information.

Note that the field 'Buddy #' in the driver record is what is displayed for that driver throughout the system so it can either contain their name or a nickname that you recognise them by.

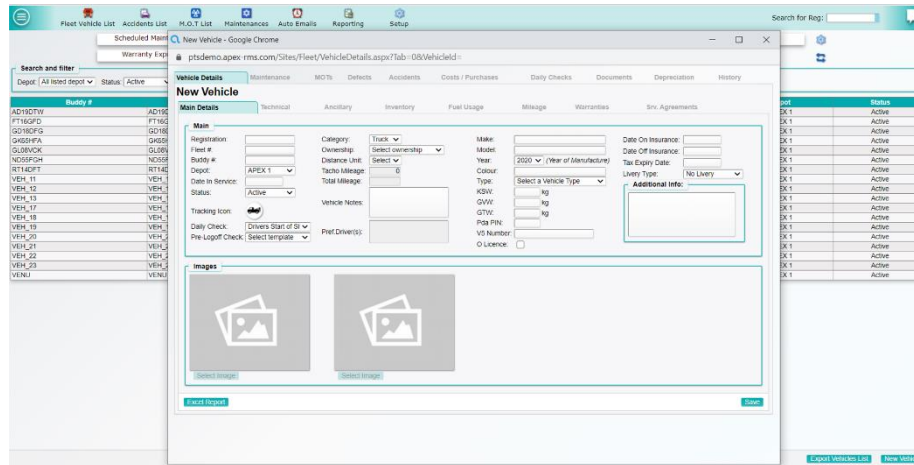
Driver Details

[Watch the Video Here](#)

Vehicles

From the main menu of PTS select 'Fleet Manager' then choose 'Add Vehicle'. Fill in the required information before clicking the Save button to complete, the system will tell you if you missed out any mandatory information.

Note that the field 'Buddy #' in the vehicle record is what is displayed for that vehicle throughout the system so it can either contain the vehicle registration or a nickname that you recognise that vehicle by.

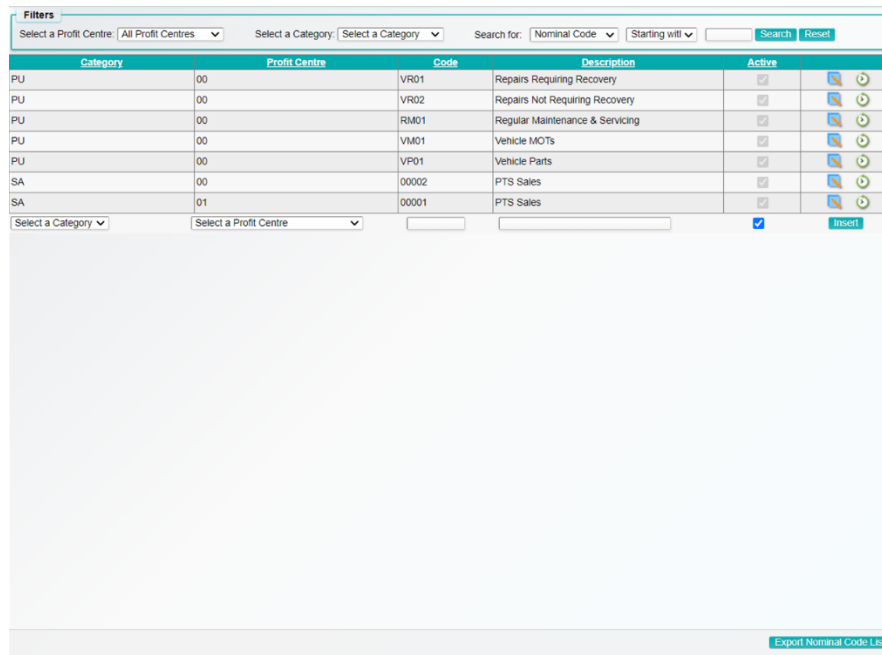


Vehicle Details

Nominal Codes

To allow export of invoice information to your accounts package and creation of purchase orders, nominal codes (sometimes called account codes in accounts packages) are required to be set up.

To set up nominal codes, from the main menu of PTS select ‘System Setup’ then ‘Nominal Codes’. Select a category, select a dedicated profit centre, enter the associated code from your accounting software/package and then enter an associated description from your accounting software/package. Then click insert to finalise.



Nominal Code Setup

To invoice work in the PTS system the newly created nominals need assigning to the charge types. From the main menu of PTS select ‘Patient Transport’ then from the top menu bar select ‘Setup’ menu choose Financial→Invoice Nominal Codes. For each charge type select the nominal code from the auto complete option. When you have finished click Save.

Charge Type	Nominal Code
Patient Transport	0000002-PTS Sales
Event	0000002-PTS Sales
Contract Hire	0000002-PTS Sales
Patient Transport Delays	00

Assign Nominals to Charge Types

Library Addresses

A library address in PTS is a commonly visited address like a hospital or a care home (or even a patient's home address). PTS comes shipped with Library Addresses for most hospitals in the UK, although they are set to inactive. To activate the inactive library addresses relevant to you, from the main menu of PTS select 'Patient Transport' then from the top menu bar select 'Setup' menu choose Operational → Library Addresses then untick the active box. A list of hospitals should appear below. Select the hospital you want to add. A new window should open. In the new window, you will see an active tick. Click on the tick box to activate. Then select save to finalise.

To create a new Library Address, from the main menu of PTS select 'Patient Transport' then from the top menu bar select 'Setup' menu choose Operational → Library Addresses then click 'New library address'. Fill in the address details and click the geocode icon (search icon), this will locate the address on the map. When finished click Save to complete.

Name	Address	Type	Postcode	Location Available	Active
Benenden Hospital	Goddards Green Road, Benenden	Hospital	TN17 4AX	✓	✓
BMI Chelsfield Park Hospital	Bucks Cross Road, Chelsfield	Hospital	BR6 7RG	✓	✓
BMI Fawkham Manor Hospital	Manor Lane, Fawkham	Hospital	DA3 8ND	✓	✓
BMI The Chaucer Hospital	Nackington Road, Canterbury	Hospital	CT4 7AR	✓	✓
BMI The Sloane Hospital	Albemarle Road, Beckenham	Hospital	BR3 5HS	✓	✓
BMI The Somerfield Hospital	63-77 London Road, Maidstone	Hospital	ME16 0DU	✓	✓
Bridgeways Day Hospital	Turpington Lane, Bromley	Hospital	BR2 8JA	✓	✓
Bromley Private Patient Unit	The Princess Royal University, Farnborough Common	Hospital	BR6 8ND	✓	✓
Buckland Hospital	Coombe Valley Road, Dover	Hospital	CT17 0HD	✓	✓
Burrwood Health and Wellbeing	Groombridge, Tunbridge Wells	Hospital	TN3 9PY	✓	✓
Cedar House Hospital	Dover Road, Barham	Hospital	CT4 6PW	✓	✓
Cygnets Hospital Godden Green	Godden Green, Sevenoaks	Hospital	TN15 0JR	✓	✓
Darent Valley Hospital	Darent Wood Road, Dartford	Hospital	DA2 8DA	✓	✓
Dmc Community Dermatology Service - Swale CCG (Sheppey Community Hospital)	Sheppey Community Hospital, Plover Road	Hospital	ME12 3LT	✓	✓
Edenbridge War Memorial Hospital	Edenbridge and District War Memorial Hospital, Mill Hill	Hospital	TN8 5DA	✓	✓
Erith and District Hospital	Erith Hospital, Urgent Care 01322356116	Hospital	DA8 3EE	✓	✓
Faversham Cottage Hospital	Stone Street, Faversham	Hospital	ME13 8PS	✓	✓

Library Address Details

Rate Cards

A rate card is used to price work when invoicing. Rate cards in PTS can be shared across many sales accounts if required (for example your default rates). PTS can price transport work either by mileage, by time, or for a given journey from one Library Address to another.

To create a new Rate Card, from the main menu of PTS select 'Patient Transport' then from the top menu bar select 'Setup' menu choose Financial→Rate Cards. Click the 'New Rate Card' button. Enter the rate card name and click Save, then enter the details of the rates you will be charging and click Save.

Rate Card Details

Sales Accounts

Each job in the PTS System requires a sales account, this tells you who the work is being carried out for and provides a means to invoice that work when complete.

From the Main menu of PTS select 'Patient Transport' then from the Setup menu choose Financial→Sales Accounts. Click the 'New Sales Account' button, enter the account's details and click Save.

Sales Account Details

PDA Setup

When a PDA first connects to the system, it is set up as inactive and needs to be enabled in the system to be used. If you followed the PDA software download previously, then there will be a PDA in the system waiting to be activated.

From the Main menu of PTS select 'Patient Transport' then from the top menu bar select 'Setup' menu choose PDA Setup → PDA List.

You should see the PDA in the list, identified by it's ID which is also shown on the screen of the PDA. Click the edit icon at the end of the row and enter the required information, set it to active and apply tracking if required then click the green tick to save.

You can now press 'retry connection' on the PDA and it should connect and show the login screen.

PDA ID	Control Room	PDA Phone #	PDA Description	Version	Last Login Date	Tracked	Active	
aa:77:8d:4e:c1:a7	APEXCR 1	sdfs	stddff	1.0.3.1	27/01/2020 11:45	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
990004885863120	APEXCR 1			1.0.2.8	22/05/2020 10:48	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
869812044200457	APEXCR 1	tablet 1	tablet 1	1.0.2.6	21/09/2019 03:14	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
6c:c7:ec:ea:d0:a0	APEXCR 1			9.9.9.9	15/07/2020 14:14	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
6a:49:8d:1c:37:b6	APEXCR 1			1.0.3.6	07/10/2020 11:06	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
54:27:58:19:46:27	APEXCR 1	apex	apex	1.0.2.8	05/12/2019 22:03	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
4JPNJ19423119888	APEXCR 1	gh	gh	1.0.2.8	24/10/2019 10:43	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
4JPNJ18709115779	APEXCR 1	tablet 2	tablet 2	9.9.9.9	06/03/2020 09:56	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
358321085290672	APEXCR 1			1.0.3.7	29/10/2020 12:48	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
358240051111110	APEXCR 1			1.0.2.8	28/03/2020 17:03	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
355405092951625	APEXCR 1			1.0.2.4	03/12/2019 09:52	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
355250084247131	APEXCR 1	LG Test	LG Test	1.0.3.6	21/10/2020 10:54	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
354965087519068	APEXCR 1			1.0.3.4	31/07/2020 12:07	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
353467108543707	APEXCR 1			1.0.2.8	11/09/2020 12:08	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
353467108541370	APEXCR 1	Berni Apex	Berni S9	1.0.2.7	01/04/2020 09:19	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Page (1) of 2

Manage your PDA licences - You are currently using 16 of 100 licensed PDAs & 5 of 100 tracking licences

Minimum PDA Software Version : 1.0.2.3

PDA Setup

PDA Configuration

There are several configuration items that apply to the Android® PDA Application. These are all managed under separate screens located in the submenu Setup→PDA Setup in the PTS system. All items require a restart of the PDA application to apply them.

Pre-set Messages are items that can be set up for commonly used messages to prevent the crew member having to type the full message every time. These are set up by choosing the 'Pre-set Text Messages' menu item. Each pre-set message has a name which is used by the crew to choose it on the PDA and the text to be sent.

Handover Terms are a list of text to be displayed on the handover form when picking up or dropping off a patient. *Note: handover forms are only available on jobs if the option in the sales account is enabled.* These are set up by choosing the 'Handover Terms' menu item, each term is a piece of text which will display against a checkbox on the PDA. You can re-order the appearance of the terms by clicking the green arrows on the left of the list.

Completion Checklist Items are a list of text displayed on the PDA when a crew completes a job. They are designed to force the crew to confirm certain actions such as hand cleaning. These are set up by choosing the 'Completion Checklist Items' menu item, each item is a piece of text which will display against a checkbox on the PDA.

Optional Setup Items

The following setup items are optional, and you can use the system without them. However, to make the best use of the features you should action these after the core items have been completed.

Web Portal Configuration & User Setup

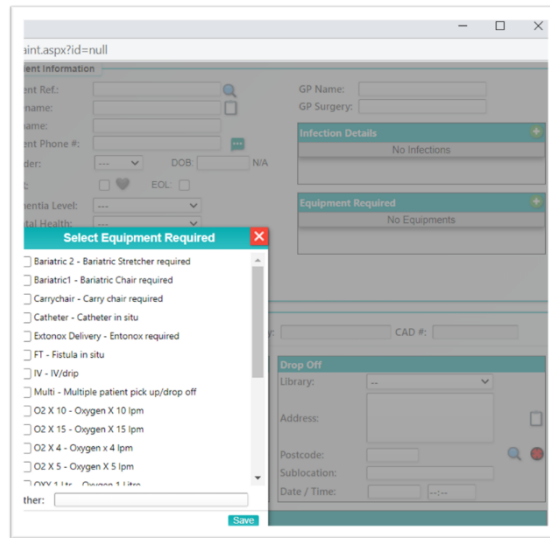
The web portal in PTS is provided for your customers to log in and book transport jobs into your system. Your portal URL is: <PORTAL URL HERE>

From the Main menu of PTS select 'System Setup' then choose 'Web Portal Settings'. This screen allows you to customise the portal login screen by providing your company logo and some text to be displayed for your customers. Make any required changes and click Save.

To set up a web portal user choose 'Web Portal Users' from the setup system then choose 'New User'. Fill in the user's details and click save. This will enable the tabs at the top of the screen. For a portal user to book transport jobs they need assigning to one or more sales account, this is done in the 'Patient Transport Parameters' tab by choosing the account and clicking the 'Add' icon. There are several other options on this tab that control what the portal user has visibility of in the system. Once your changes are complete click Save.

Equipment List

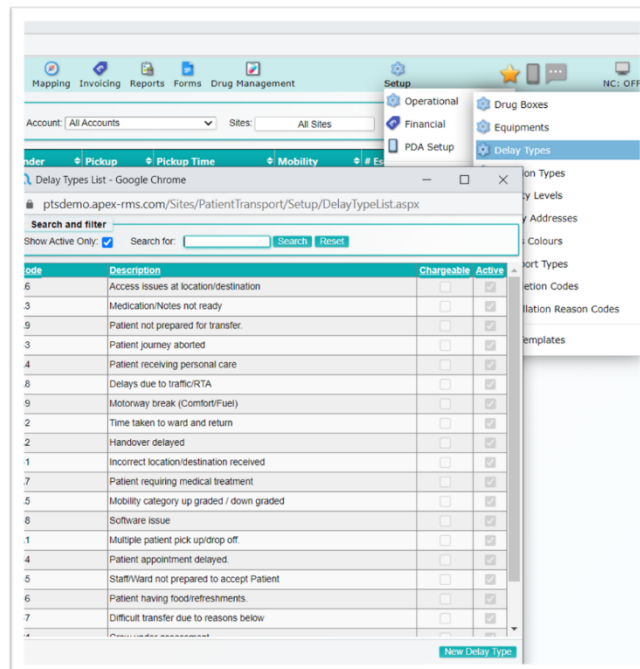
You can specify for a transport job that certain equipment is required, for example Oxygen. PTS comes set up with a standard list of equipment but that can be added to or altered as required.



From within the PTS system select Setup→Operational→Equipment. You can alter the list, deactivate ones you don't want to use or add new ones using this screen.

Delay Types

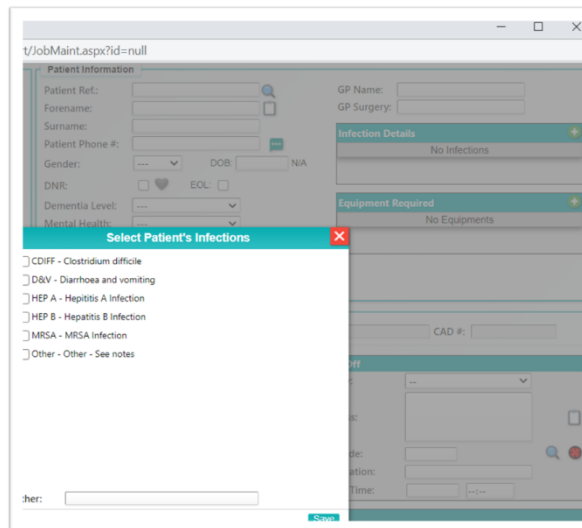
When picking up or dropping of a patient it is possible for the crew to record delays against a transport job. Delays are tagged with a type to allow reporting against them.



To set up delay types, from within the PTS system select Setup→Operational→Delay Types. Note that you will have to restart the PDA applications to pick up any changes.

Infection Types

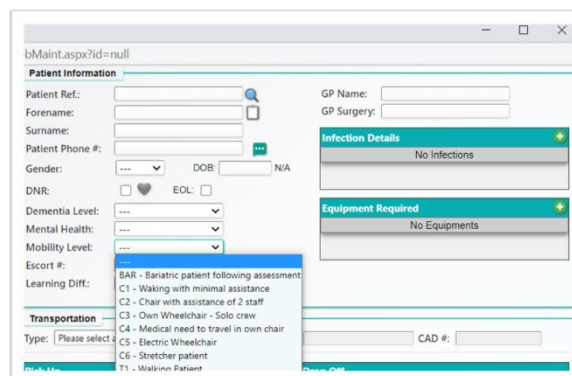
You can specify for a transport job that the patient has an infection, using a list of infections set up in the system. PTS comes set up with a standard list of infections but that can be added to or altered as required.



From within the PTS system select Setup→Operational→Infection Types. You can alter the list, deactivate ones you don't want to use or add new ones using this screen. There is a flag on each infection 'Requires Warning'. If this is set the controllers and crew members will be shown an alert for patients with the infection.

Mobility Levels

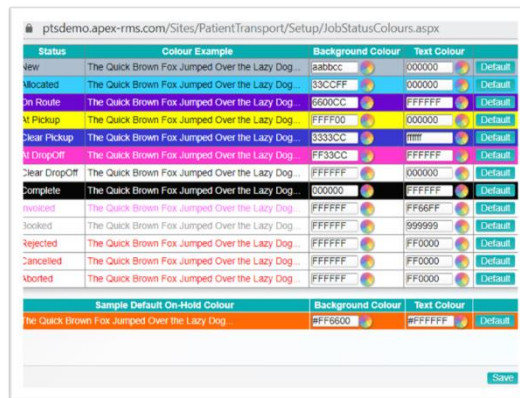
You can specify for a transport job in the system what mobility the patient has. PTS comes set up with a standard list of mobility levels but that can be added to or altered as required.



To set up Mobility Levels, from within the PTS system select Setup→Operational→Mobility Levels.

Status Colours

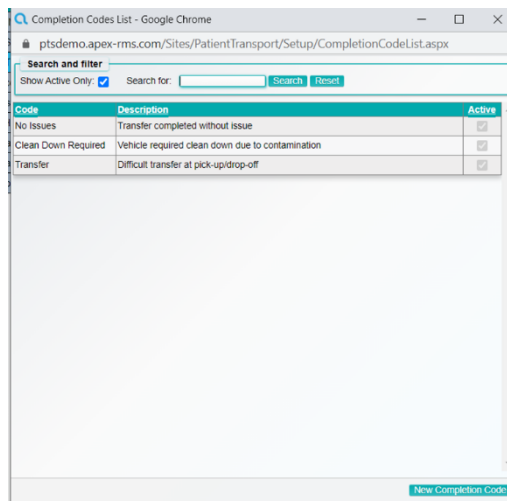
Throughout the system transport jobs are colour coded depending on their current status. The colours are pre-set but can be altered to suit.



To set up Status Colours, from within the PTS system select Setup→Operational→Status Colours.

Completion Codes

When completing a transport job on the PDA’s, the crew are asked to enter a completion code. This is used for reporting to justify any delay between dropping the patient and completing the job.



To set up Completion Codes, from within the PTS system select Setup→Operational→Status Colours. Note that you will have to restart the PDA applications to pick up any changes.

Cancellation Codes

When you cancel a transport job you are prompted to choose a cancellation reason from a list, this is to allow more accurate reporting on job cancellations.

Code	Description	Active	Send to PDA	Aborted Cancellation
CANX	Cancelled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CAPA	Lack of capacity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIN	Potential clinic transfer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MEDI	Unable to transfer due to medical needs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHE	Other reason	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
OUTA	Transfer out of area	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TITT	Too ill to Travel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

To set up Cancellation Codes, from within the PTS system select Setup → Operational → Cancellation Reason Codes.

SMS Templates

It is possible from within a transport job to send SMS messages to the mobile number stored within that job. These SMS messages can either be free text or templated using placeholders for certain fields within the job.

To set up SMS Templates, from within the PTS system select Setup → Operational → SMS Templates. When setting up a template there are several placeholders which when clicked add that placeholder to the current template.

Form Templates

The PTS system caters for customisable forms, which can either be filled in on the PDAs or via the desktop software. The forms are built by creating templates, adding fields of different types and specifying how those fields are to be filled in. The fields can be either text fields (text / numeric / date / time), checkboxes, signature pads or patient injury diagrams. Once the fields have been added to the form template, a printout template is then set up to tell the system how to print any completed forms.

A form can either be job related or stand alone, for job related forms, fields from the transport job can be pulled in automatically to save the crew having to fill out that information. Completed forms can be automatically emailed to a specified address if required.

To set up Form Templates, from within the PTS system select Setup→Operational→Form Templates. To create a new Form Template, click the 'Add New Form Template' button to open the form details screen.

Enter a name for the form and if required enter the email address for completed forms to be sent to and choose if the form should be job related or not.

Fields can be added to the form template by using the fields at the bottom of the screen, specifying how each field should behave before clicking the Insert button to add the field to the template. As you add fields, the preview on the right-hand side will change to show what the form will look like on the PDA.

Once all required fields have been added to the form template, click the 'Template' tab, this will open a Word® like editor to allow you to design the printout. The form fields will appear as placeholders on the right, and if the form template is job-related the job-related placeholders will appear too. Clicking the placeholders will add that placeholder to the template in the current position of the cursor. As a shortcut you can design your template in Word® and paste it into the screen, then add the placeholders.

Once you are finished click save, note you will need to restart the PDAs to pick up new Form Templates.

Suppliers

In order to use fleet vehicle maintenance schedules and the purchase order system, you will need to set up suppliers for the companies that carry out the work to your vehicles. If you carry out all work yourselves, you will need to set up an internal supplier.

To set up a supplier, from the main menu of PTS select 'System Setup' then 'Suppliers' and click the 'New Supplier' button. Fill in the required details (leave the Supplier type as 'Supplier') and click Save. Repeat for your list of suppliers.

Fleet Vehicle Maintenance Schedules

Creating Maintenance Schedules

The Fleet module within PTS has the facility to record maintenance for vehicles and remind you when the next maintenance item is due, maintenance items can be things like yearly service or scheduled cleaning. Vehicles can have different maintenance schedules to suit their needs and each schedule can have multiple items to cover all aspects of maintaining a vehicle. Maintenance items can be based on vehicle mileage or time (for example yearly service or 18,000 miles).

To set up maintenance schedules, from the main menu of PTS select 'Fleet Manager' then Setup→Maintenance Schedules then 'New Schedule'. Enter a name for the schedule and click the Save button, then the 'New Maintenance Item' button. Enter the required information and click Save to record the item, continue this process with all maintenance items for this schedule.

Applying a Maintenance Schedule to a Vehicle

In the Fleet Manager module, find the vehicle you wish to apply the maintenance schedule to and open its details. Click the 'Technical' tab, select the maintenance schedule from the drop-down list and click Save.

Recording Maintenance

To allow the system to notify you when maintenance is due, we must tell the system the next time that maintenance is due. In the Fleet Manager module, find the vehicle you wish to record the maintenance for and click the 'Maintenance' tab then 'New Maintenance'.

Choose the item and enter the due date / mileage then click Save, this will leave the maintenance record as status 'due' and you can be reminded when the time comes. Note this process is the same for MOT reminders.

Set up Fleet Reminders / Notifications

The Fleet module can send nightly emails to users of the system to remind them of:

- Maintenance Due
- MOT's Due / Overdue
- Road Tax Due

To do this, from within the Fleet module select the 'Auto Emails' menu icon. In the 'Email Reports' tab select a user from the list (note only users with work email addresses will be shown) and select the nightly reports required then click the 'Add' button at the end of the row.