

# **PowerSoftMD Implementation Plan**

## **Step-up Steps**

- \_\_\_ 1. Install Computers and Software.
- \_\_\_ 2. Set up Network Definitions and computer links.
- \_\_\_ 3. Review **PowerSoftMD** Manual and on screen audio topics.  
Users Manual can also be accessed through "Documentation" on Primary Menu.
- \_\_\_ 4. Mail, Email, or Fax copies of your Fee Schedule, Diagnosis Code List, and Super Bills to Data Tec. We will set up your Fee Schedule file, update your Diagnosis file, and create a custom Super Bill for PowerSoftMD at NO CHARGE!
- \_\_\_ 5. Update CPT Fee Schedules.
- \_\_\_ 6. Update most common Insurance Carrier List.
- \_\_\_ 7. Customize Forms, super bills, patient info forms, etc.
- \_\_\_ 8. Set up EasySchedule format and options, ask Data Tec for assistance.
- \_\_\_ 9. Staff must practice entering patients, posting transactions, printing insurance.
- \_\_\_ 10. Schedule Electronic Claims Clearing house software installation and training.
- \_\_\_ 11. Select target implementation date.
- \_\_\_ 12. Optionally transfer manual appointments to computers schedule.
- \_\_\_ 13. Post open balances prior to implementation date.

# **PowerSoftMD Implementation Steps**

## **Prior to Patient Visit**

- \_\_\_ 1. Make on going appointments as they occur.
- \_\_\_ 2. Print Super Bills and Patient Info form.

## **During Patient Visit**

- \_\_\_ 1. Have patients review and update the Patient Information form.
- \_\_\_ 2. Start checking patients out using PowerSoftMD. It is best to post transactions while the patients are there. Give them a walk out receipt if needed.
- \_\_\_ 3. Schedule future appointment(s) before patient leaves.

## **After Patient Visit**

- \_\_\_ 1. You may update computers insurance information after patient leaves.
- \_\_\_ 2. Print or send claims electronically.

## **Daily Activities**

- \_\_\_ 1. Start Up Computers
- \_\_\_ 2. Clock in beginning of day, Clock out end of day.
- \_\_\_ 3. Enter Insurance and Personal Mail Payments.
- \_\_\_ 4. Run Daily Reports from Reports Menu at end of day.
- \_\_\_ 5. Print Schedule and forms for next day.
- \_\_\_ 6. Back Up computer to Zip Disk and take out of office. Need to alternate between 5 Zip Disks, one for each day of the week.

# **PowerSoftMD Implementation Steps, cont.**

## **Weekly Activities**

- \_\_\_ 1. Review Insurance Non Submitted report to catch claims that haven't been sent.
- \_\_\_ 2. Review Insurance Overdue report to follow up on late claims.
- \_\_\_ 3. On Friday's print entire schedule for next week on paper.
- \_\_\_ 4. Run and review Electronic Claims clearing house reports.

## **Monthly Activities**

- \_\_\_ 1. Run account aging report(s) and review overdue accounts.
- \_\_\_ 2. Run monthly patient statements and mail or send electronically.
- \_\_\_ 3. Back Up **PowerSoftMD** to a CD and save forever.
- \_\_\_ 4. Print Birthday Cards for active patients.
- \_\_\_ 5. Print Recall Cards for active patients.
- \_\_\_ 6. Print Recall report for previous month and try and reschedule patients that didn't come in.
- \_\_\_ 7. Print Cancellation report and try and reschedule patients that didn't reschedule.

## **Periodically**

- \_\_\_ 1. Run Management Reports to review for practice analysis.
- \_\_\_ 2. Run Time Clock reports for each pay period.
- \_\_\_ 3. Have Data Tec review a back up media to make sure it is running properly.