Insurance Claims

To print an individual claim:
1. Open the patient's record, click on the "Print" option from the drop-down menu at the top, Select "Insurance" then "HCFA 1500 NPI Red." 2. Make sure dates of service are correct.
3. Select "Type" of claim: PPrimary, S-Secondary, T-Third.
4. Press "Print Form" button.

To print batch of insurance claims:
Use the "Forms" menu icon, then "NPI Paper" claims options.

To submit electronic claims:
Use the "Forms" menu icon, then "Electronic" or "Electronic Resub by DOS" buttons.

For Claims Not Submitted and/or Overdue: Use the "Reports" menu, then "Monthly Reports", and "Primary Ins Outstanding Charges".

Patient Billing

1. On the patient ledger, make sure that everything you wish to bill the patient is marked as "Bill"
2. From a patient's general screen, select the top menu option "Print" then "Bill" then "Bill CHG Code Level" 3. You can print batch bills from the "Forms" Menu, then "Billing," then "Multiple Statements CHG Code Level"

Reports

1. Select the "Reports" menu icon from the Primary Menu. **NOTE:** Reports are organized by categories and you can print reports any time you want. Ex: print monthly reports every day if you wish.

DataTec PowerSoftMD

www.PowerSoftMD.com

P.O. Box 31576
Des Peres, MO 63131

Voice: (636) 256-7401
Fax: (636) 230-6801

Adding Patients

Scheduling, then select the Binoculars Icon,

then pick the Green "NewPatient" button.

1. Information can be in lower case, it is automatically changed when saved.
2. Use the ZipCodes button to set up common zip codes.
3. Click on the city field to select from the Zip Code list, or the down arrow on Zip Code field.
4. Click Brown "Doctor" button to select the referring doctor.
5. When complete, click the Red "Add Pat" button.

Updating Patient Info

Select the "Patient" icon.

1. On the General screen change information then press the disk icon.

2. Changes are automatically saved when switching screens.

To change a patient's name: Use toolbar "Tools" then "Change Name".

Posting Visits

1. At Check In Time you may use the Primary Menu Posting button, Drop Down Arrow and "Held Payments" to capture Co-Payments and print a Receipt.
2. To post charges Click the "Posting" icon.

3. Retrieve the Patient by name, number, SSN, etc.
4. Fill in CHG codes, diagnosis codes, dates of service, payment amount and type of payment, any adjustment amount and type of adjustment. Double-click on fields to look up codes. Optionally use the SOAP button to bring charges from the EMR.
4. Press the "Pre-Post" button to fill in all the fields and check for errors.
5. Override any amounts you wish to change.
6. Press the "Post" button to *actually* update the account. 7. Select the Print option on the Top menu if you wish to print a receipt, etc.

Posting Payments

1. Use the "PostPay" icon.

2. Retrieve the Patient and click the boxes to insert payments, using the EOB for insurance checks.
4. Don't forget check numbers and adjustment codes if applicable.
5. Press the "Post" button.