



Users Guide

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1.1 OVERVIEW

PowerSoftMD is Software designed specifically for the Medical Office. This easy-to-use System will make your File Keeping easier, eliminate redundancies, and provide you with **Management Reports and Marketing Tools** that will **increase the effectiveness** of your Practice! Because **PowerSoftMD** was designed in actual Medical Offices it will be an easy fit right from the start.

1.2 MAJOR FUNCTIONS

- Billing
- Insurance, Paper and Electronic
- Statements, Paper and Electronic
- Electronic Medical Records
- Employee Time Clock
- Recalls
- Birthday Cards
- Referrals Tracking
- Practice Management Reports
- Prescriptions
- Scheduling
- Word Processing
- Many additional Functions are available in our Optional **EMR** "Electronic Medical Records" Package.

1.3 INCREASE EFFICIENCY, EFFECTIVENESS AND PROFITS

- A.** Produce timely and informative Reports of
 - Procedures that produce the most Revenue.
 - The percentage of New Patients.
 - Patients who have missed Appointments and didn't Re-schedule.
 - Detailed Collections Data for Insurance and Personal Payment.
 - Referral Tracking and Follow Up.
 - Selected Patients, by your Criteria, for flexible Reporting.
- B.** Improve Patients' rapport by recording Comments about their Interests and Hobbies. Only the pertinent Information Prints on the Super Bills & Work Tickets.
- C.** Increase Collections by
 - Tracking Late Payments from Patients and Insurance Companies.
 - Assigning Finance Charges.
 - Printing Financial Agreements.
- D.** Improve Cash Flow
 - Print Quick, Accurate, Insurance Forms, and Electronic Claims.
 - Know the Patients Co-Payments, and Collect Fees Up-Front.
- E.** Track Referrals from and to Other Offices. Print Welcome and Thank You Letters.

1.4 FEATURES AND SPECIFICATIONS

PowerSoftMD is Feature packed for Flexibility:

- Several Statement Options
- Individual and Batch Insurance Forms
- Insurance Claim Tracking
- Electronic Records, SOAP Notes, Vital Signs, etc.
- Multiple Fee Schedules
- 30/60/90/120-Day Account Aging
- Referral Reports and Thank You Letters
- Walk-A-Way Receipts
- Integrated Word Processing
- Easy-to-Use Forms
- Labels by Varied Criteria
- Quick Totals and Day-End Reports
- Dates Automatically Updated
- Practice Analysis Reports
- Chg(Charge), Office and Shorthand Codes for Posting
- Recall Report and Mailings
- Instructive Audio / Video Training Sessions
- Sample System and Sample Patients for Training
- Help Key and On-Screen Tutorials
- Full-Screen Processing
- Ability to Network as many Computers as you desire (Unlimited)
- Capacities (Number of):
 - Patients.....100,000 Active, unlimited In-Active
 - Doctors.....1 Hundred
 - Procedure Codes..... 1 Thousand
 - Fee Schedules..... 1 Hundred
 - Referring Doctors/Agencies. 10 Thousand
 - Insurance Carriers.....10 Thousand
 - Transactions "Ledger".....16 Million

1.5 SYSTEM REQUIREMENTS

PowerSoftMD is programmed to take advantage of the Latest Computer Technology:

- WINDOWS 10, 8.1, 7, Vista, XP, 32 bit and/or 64 bit versions
- Tablet PC's – i.e. Microsoft Surface Pro
- Card Scanner – i.e. Ambir PS667-AS
- Twain compliant scanners – i.e. Fujitsu Fi-7160
- Web Cams for Patient Photos – i.e. Microsoft

2.1 INTRODUCTION

After Installation, your **PowerSoftMD Program** will be on the Computer's Hard Drive or if you are using a Cloud configuration on the Clouds server computer.

2.2 START UP

After Installation, **PowerSoftMD** can be started as follows:

1. **Power-On** your computer; once Windows has started, a **PowerSoftMD Icon** will appear on your Desktop.
2. Just **point to** the PowerSoftMD **Icon** and **Select it** with your **mouse**. Next, you will be **prompted** to Enter your **User ID and Password**. This allows different People in your Office to have different levels of Security Access. It also identifies what User is making "**Changes**" to the Records. We highly recommend a **separate User ID for each Staff Member**. See Chapter 13 for setting up New ID's and Passwords.
3. Next, the PowerSoftMD **Primary Menu** will be displayed.

2.3 COMPUTER BASICS

The computer is controlled by Instructions called *Software* or *Programs*; and runs under the control of two Primary Types of Programs:

Operating System Program

This is Windows 11, 10, 8.1, 7, Vista, XP, 2019 Server, or 2016 Server, Etc. It is the high-level Master Control Program that runs the basic Computer.

Application Program

PowerSoftMD provided by Data Tec, Incorporated, is a Collection of Programs that perform Medical Office Tasks. PowerSoftMD was designed to handle a high volume of work. Once you use the Features, Functions, and Templates a few times, you will find that it has become very easy and friendly to use!

There are Two Types of **PowerSoftMD** Screens; Menus and Access. Menu Screens let you Select from a variety of Options or Tasks, and need very little explanation. Access Screens allow you to Store Information or Process Information; an example is the Patient General Information Screen.

2.4 MENUS

Screen Menus present you with a **List of Options** that can be performed. Think of the **PowerSoftMD** Menu like a Food Menu; it lets you see what is available and to choose exactly which Option you want. *The Options are selected by Clicking on Buttons" (or their Descriptions to the right) with your mouse.*

If you point to an **Icon Button** or its Description with your mouse pointer and wait a few seconds (without clicking), a more Detailed Description of the **Icon Button Function** will be displayed. For easy usage, some options can be accessed by simply **Clicking on the Icon or Text Description**.

The first **Menu displayed** when **PowerSoftMD** is started is the **Primary Menu**. When on any Patient Screen, you may **Return to the Primary Menu** by **Clicking on** the Toolbar Menu Option or **Selecting** the Top **Exit Icon**.



Selecting an Option from the top of the screen **Toolbar** may cause **Secondary Options** to appear, which gives you a (**Subset of Options**) that relate to the Original Option selected.

2.5 GUIDELINES

The following are some simple Points to keep in mind:

A. Review this Manual completely, and memorize every little Item, just kidding! It's great to read the Manual, in fact we even recommend you consider reading the Owner's Manual for your car. You will find many Built-In Aids. These **Aids** are always your Source for the most up to the minute Information. They include; pointing to Items with the mouse to see a Description of the Item, the **Help Buttons** bring up Hints about Specific Screens, the "Tutorial Option" from the Primary Menu, and even **On-Screen Audio/Video Training Sessions**.

B. Pay close attention to what you are **requested** to do. For example:

- a.** **"Enter"** refers to **"Multiple Key Entries"**. If you are Prompted to **"Enter"** Something, **Type-In** the desired Information; then either **"Press the Enter Button"** or **"Click the OK Button"** on the Screen (if it is highlighted).
- b.** **When** given a Panel of Buttons to Press, you may **Click** any Desired **Button**; or if you find the **Desired Button** is Highlighted you may simply **"Press the Enter Key"**.
❖ If a "Button" has an Underlined Letter like Save you may hold down the **Alt Key** and the **Underlined Letter to Select the Button**.

C. Use Capital or Lower-Case Letters as desired. Patient Names will be converted to upper case. All Data that includes Addresses will **automatically be capitalized** for you.

D. Be sure that you **recognize the differences** between your Computer Keyboard and the Typewriter Keyboard. Use the Number “1” Key (*not* the Letter “L” Key) for the Digit Number One. Also, use the Zero-Digit Key for the Number (*Not* the Letter “O”).

E. Dollar Amounts may be entered with or without a Decimal Point. Negative Amounts may be entered by using the Minus “-” Sign on the Numeric Keypad or above the “P” Key.

For example:

ENTER:	VALUE:	ENTER:	VALUE:
10	10.00	10.5	10.50
510.245	510.24	10.75	10.75
-.98	-0.98	-5	-5.00

F. When prompted to enter Date Information, you will generally **need to type** the 2-digit Month, 2-digit Day and *entire* 4-digit Year (without spaces, slashes, or hyphens) such as MMDDYYYY. For example: 06092023 for June 9, 2023.

G. You may **exit** PowerSoftMD two **ways**:

a. From the **Primary Menu**, **select the Log-out Button**. This exits **PowerSoftMD** and requires the next User to Login to get Access.

b. If you want to **Exit** PowerSoftMD and want to Access it again on the *same day* without having to Login again, then **click the “X”** in the extreme upper, right-hand corner of the Window to exit **PowerSoftMD** (as this does for any Program).

2.6 ENTERING DATA

Patient Information Entry and Account Posting are done by Entering Data into Screen Fields. PowerSoftMD has been designed to keep Data Entry to a minimum.

Patient Screens allow you to enter several Screen Lines at one time; the Process is called Full-Screen Processing. This flexibility helps to make PowerSoftMD both fast and easy to use.

A. Data Entry is allowed only in the Fields within Data Area Boxes on the Screen.

B. When you click on a Data Field that already contains Text, the entire **Text Area** will be **highlighted**. If you **start to Type, then all the Previous Text will disappear** and your New Text will **replace it**. But, if you wish to **change only part of** the Existing Text, use the Keyboard Small Arrow Keys to move left and right, then **insert or delete anything** you want.

C. Enter Data at the Screen Cursor which is a **Flashing Vertical Line**. You may use your **Insert and Delete Keys** on the Keyboard to make **corrections**.

D. Don't be afraid of the Keyboard; you can only enter Data; you cannot **break the Program or the Computer with bad Data**. **Remember any Errors** that you make during Data Entry **can always be corrected**.

E. Click on a Data Field, or use the **Tab and Enter Keys** to move to a Field. When you **click on** a Field, the whole Field **turns dark**, allowing you to **begin typing to replace** the entire Line. If you only want to Replace, Insert, or Delete part of the Field; click on the Field; then use your Keyboard left-arrow and right-arrow Keys at the bottom of the Keyboard to position the Curser where you want to enter new Information to change any existing Information

F. Type Data into as many Areas as you want, then press the Save Button to save your changes onto the Computer's hard drive. If you **change Patient Screens without using the Save Button** the Data will **automatically be saved** to disk for you. If you change your mind and **do not want your changes saved**, use the **Undo Button** before switching Screens or Patients.

G. Do not use letters for numbers, or numbers for letters.

2.7 CURSOR MOVEMENT AND EDIT KEYS

Learn to use the **Cursor movement** and **Edit Keys**. These are the standard Windows Keys.

Move to Data Fields

Tab: Moves you forward to the next Data Field.

Shift Tab: Moves you backward to the previous Data Field.

Enter: Moves you forward on most Screens.

Move Single Spaces

Left Arrow: Moves you left one space.

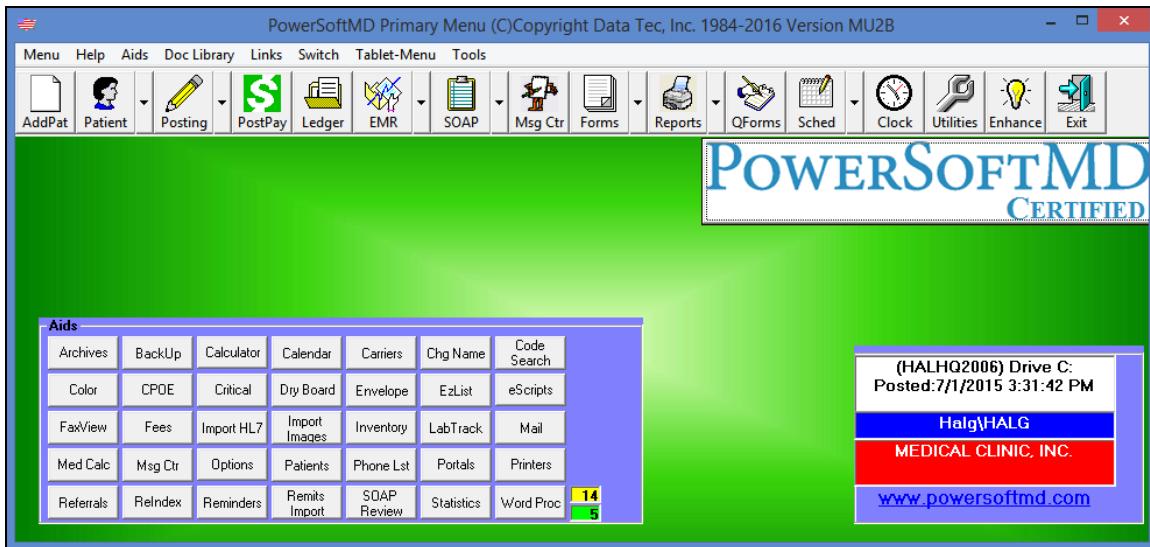
Right Arrow: Moves you right one space.

Insert, Delete

PowerSoftMD uses the standard Windows Edit Keys: **Insert, Delete, End, Etc.**
Use the Sample Files by selecting the Sample Mode on the Primary Menu to become familiar with the **Cursor movement and Edit Keys**.

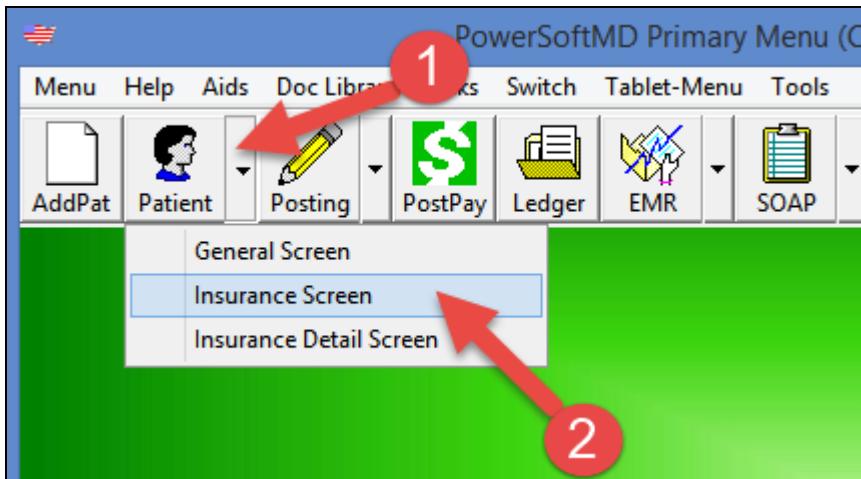
3.1 PRIMARY MENU

The **Primary Menu** is the point of entry and exit. It is best to **Logout** from this Menu before shutting down the Computer. You can get complete details regarding the version and fix level of your software by pressing the F11 key on the keyboard while on this screen.



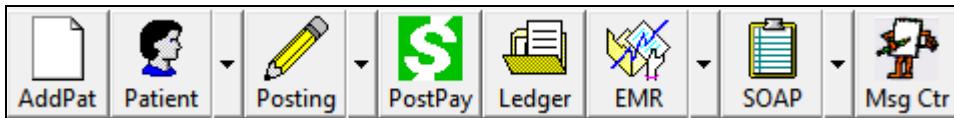
To select an option from the Primary Menu, place the mouse over the desired option Icon or Button then click. Place the mouse over an Icon or Button for a few seconds to view an On-Screen Helpful Hint.

Be sure and notice the top toolbar Help Menu Option for built-in documentation.



In addition, to clicking the top Icon buttons you can click the down arrow (1) to the right of a button to select from a list of more detailed options (2).

3.2 ICON BUTTONS



AddPat - Add New patients, this can also be done on the scheduling screen.

Patient - Access and/or update patient demographics.

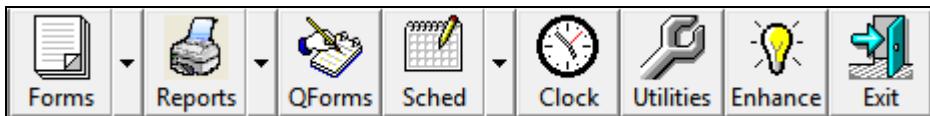
Posting - Post Charges and Co-Payments to patient financial ledgers.

Ledger - Access patient financial ledgers.

EMR - Access patient Electronic Medical Record charts.

SOAP - Directly open a patient SOAP Note or Visit EMR screen.

Msg Ctr - Launch the Message Center for patient telephone messages and other communications.



Forms - Open the Forms Menu; Patient Statements, Insurance Claims, Recall Cards, Birthday Cards, Labels, Mail Merge, etc.

Report - Open the Reports Menu.

Sched - Open the Schedule.

Clock - Launch the Employee Time Clock

Utilities - Open the Utility Menu; update practice information, Chg Codes, Diagnosis Codes, etc.

Enhance - View most recent enhancements and/or request enhancements.

Exit - Close the PowerSoftMD software. If you use the Windows close "X" button then PowerSoftMD will close, but your user-id will remain logged in.

3.3 TOP MENU TOOLBAR



Menu - Lets you launch other menu screens.

Help - Gives you built-in help documentation options.

Aids - Lets you select from a list of available extra features.

Doc Library - Lets you scan or import in common documents that you can share with all users and/or import into patient EMR document folders.

Links - Useful Internet links.

Switch - Used to set up different Sets of Patient Records for different Practices, on the same Computer. **Talk to Data Tec for assistance with this!**

Tablet-Menu - Switches you to the Tablet style Primary Menu.

Tools - A set of tools you use to, update your software, check you in-office network speed, allow support technician access, etc.

3.4 AIDS

Aids							
Archives	BackUp	Calculator	Calendar	Carriers	Chg Name	Code Search	
Color	CPOE	Critical	Dry Board	Envelope	EzList	eScripts	
FaxView	Fees	Import HL7	Import Images	Inventory	LabTrack	Mail	
Med Calc	Msg Ctr	Options	Patients	Phone Lst	Portals	Printers	
Referrals	ReIndex	Reminders	Remits Import	SOAP Review	Statistics	Word Proc	14
							5

At the bottom of the Screen is a special area of selection buttons labeled **Aids**. These buttons let you quickly access extra features.

Calculator - On screen calculator.

Carriers – Quickly **look up** Insurance Carriers by Name, Address, part of an Address, Etc. It will show you the Telephone Number and you even can **click** on the desired Name and **Print** an Envelope!

Chg Name - Change a patient's name, you can also do this from the patient's General screen.

Code Search - Look up Diagnosis Codes.

Color - Set the background color of patient screens.

CPOE - Computerized physician order entry, create and track orders for Laboratory, Medications, and or Radiology/Imaging.

Critical - Report patients marked for Critical Recall and their last patient visit was over a specified period of time.

Dry Board - Handy centralized bulletin board you can write and/or draw on, all users can access.

Envelope - Print addresses on envelopes.

EZList - Create, update, and/or print "To Do" lists that all users can access. For example: Patient's waiting for appointments, items that need to be ordered, or Topics you want to bring up at your next office meeting, etc..

eScripts - Check for Renewals, launch an on-screen Status Check Program, or watch eScript videos.

FaxView - Access the Fax Folder. You can set up fax server software and have it store faxes on a shared location, typically on your main shared drive. We recommend using: www.snappysoftware.com

Fees - Access your Chg Fee Schedules to answer Patient questions.

Import HL7 - View & Import HL7 Lab Results and store into patient EMR Charts. Integrates with the LabTrack screen.

Import Images - Import image file (X-Rays, CT Scans, MRI's, Ultrasounds, etc.) into patient EMR Charts.

Inventory - A simple Inventory tracking system.

LabTrack - Track Lab cases sent out and when they return.

Mail - In-Office Messages to other PowerSoftMD Users. Can be used as an In-Office Communications Tool, even to send reminder messages to yourself!

Med Cal – Brings up some useful Medical Calculators like Delivery Calculations, Body Fat, or GFR.

Msg Ctr – Message Center, to handle telephone and other patient and Non-Patient Messages, includes message archival. Stores patient communications into the patient EMR Charts.

Options - Customize PowerSoftMD features, some for all work stations (Global) and some specific to the work station you are using (local).

Patients - High level search through patient records by patient demographics.

Phone Lst - Create and access List(s) of Employee, Supplier, and other Important telephone numbers and contact information. You may have multiple lists, and the lists can include mailing information just like a Rolodex.

Portals - Access patient portals and secure messages from other doctors.

Printers - View your work stations printers and optionally switch your default windows printer.

Referrals - Search your Referring Doctor data base and/or print envelopes for referring doctors.

Reindex - Run periodically if your patient names don't appear to be alphabetized properly.

Reminders - Display any patient reminders that have been set and come due.

Remits Import - Import Insurance Carrier Payment information from the Trizetto (Gateway EDI) Clearing House.

SOAP Review - Special SOAP Note review function for Nurse Practitioner types of practices only.

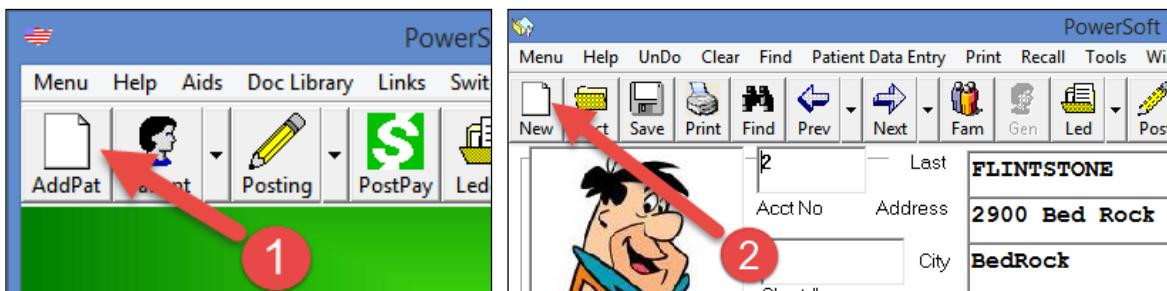
Statistics - Network connection and data base capacity information.

Word Proc - Launch Microsoft Word and/or other word processing options.

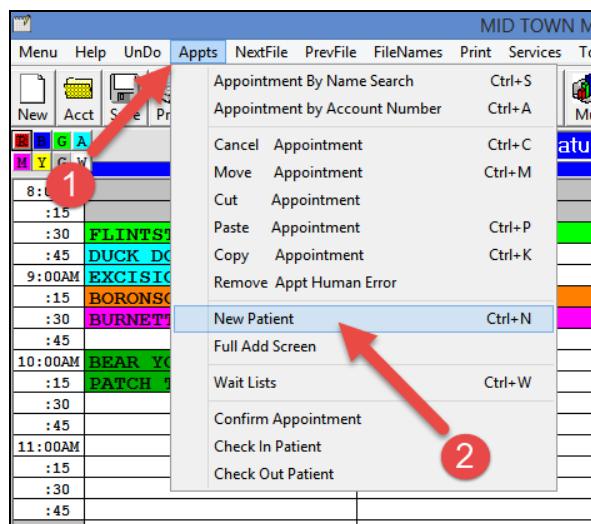
4.1 ADDING PATIENTS

One of your first objectives will be to enter Patient Names, Addresses and other basic Demographic & Insurance Information into your System. You have the option of adding all or just the Names of Active Patients. New Patients can be using 2 different add screens.

- 1) The **Full Add** patient screen is launched from the **Primary Menu** from other **Patient screens**. This will open the Full Add patient screen letting you add lots of detail; typically you would use this if the patient were in the office.



From the Primary Menu select the **AddPat** Icon button (1) or the **New** Icon button (2) from other patient screens.



- 2) The **Small Add** patient screen is launched from the **schedule**. This just adds the patient basics, typically while they are on the telephone.

From the schedule you can launch the schedule Add New Patient screen by selecting the top toolbar **Appts** option (1) then selecting **New Patient** (2).

PowerSoftMD automatically assigns Patient Account Numbers. There is an optional field where you can enter another Medical Record Number, if you wish.

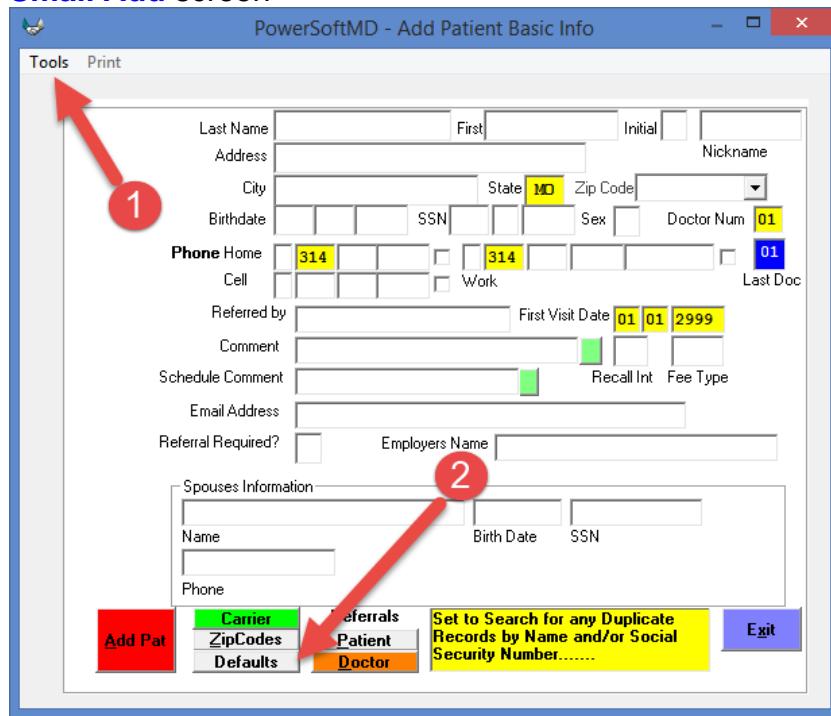
Full Add screen

The screenshot shows the 'Add Patient Full Screen' with the following details:

- Top Bar:** Menu, Help, Undo, Clear, Find, Patient Data Entry, Print, Tools, Window.
- Toolbar:** New, Acct, Save, Print, Find, Prev, Next, Fam, Gen, Led, Post, Pay, Bulk, Insur, Sch, EMR, Sel, Exit.
- Form Fields:**
 - Address, City, Birthdate, SSN, Sex, Race, Marital, and several phone numbers (Home, Work, Cell) are highlighted with yellow boxes and circled with red arrows (1).
 - First, Initial, Nickname, and other medical record numbers (e.g., MO, Doc#, Resp Acct#, Recall Interval) are also highlighted with yellow boxes and circled with red arrows (1).
 - Other fields include Status (ACTIVE), E-MAIL, Flags, Premedication, First Visit Date (01/23/2016), Referrals, and Comment.
 - At the bottom, there are buttons for Fill In, Add Pat, Ins Find, ZipCodes, Defaults, Fam Mem, and a dropdown menu for Referrals (Patient, Doctor).

When the **Full Add** screen is displayed, you can have fields (1) automatically fill in with default values. You can also specify specific options to take place when you add or create the new patient record. Use the **Defaults** button (2) to set up these values and options.

Small Add screen



On the **Small Add** screen use the top toolbar **Tools** option (1) to specify actions that are to take place during and after you add the new patient. Use the **Defaults** button (2) to set up field default values.

4.2 DATA ENTRY

When typing in Patient Information you do *not* have to capitalize anything; PowerSoftMD does this for you.

When you add a Patient, the First Visit Date Field is automatically set to the Computer's Date. If this is not the Patient's First-Visit Date you will have to over-type it or Blank It out. You can set an Option on the POSTING Screen, to automatically set the First Visit Date to the date of the First Ledger Item Posted, this is highly recommended.

4.3 USING FULL ADD screen

To have Families in the Computer, each Patient is assigned their Own Individual Account Number. Then, on a Patient's Record you can place the Account Number Responsible for the Bills in the Field called Resp Act. In this way you build a Family Tree. What is convenient about this is that if someone leaves a Family, you merely remove the Resp Acct Number from the Individual's Record and their entire Record remains intact; they just aren't in the Family Tree anymore.

Therefore, when you are adding a Family, you should add the Responsible Party first; the New Account Number for this Person will be displayed in the upper, left-hand corner after they are added. Then, when you add their Dependents, you can place this Account Number in the Dependents Resp Acct Field.

If someone is responsible for the Insurance and they are not an Actual Patient you do not have to create a Record for them. Their Individual Insurance Information can be entered on the Actual Patients Record. This will be covered in detail later under Insurance.

After you add a Patient, you can and an option set to be prompted to enter more Insurance Information at this time if you wish. If you have already entered all your Patients Info into the Computer, we recommend you don't enter the Insurance Information until the Patient comes back in to see you. This saves time, and they might change their Carriers anyway.

Be aware that you can use the "InsFind", "Doctor", "Patient", Buttons to search for Specific Information at the bottom of the Screen. You may also optionally Double Click on the Field, for example Double Click on the Carrier Number Field and the Insurance Carrier Search Screen will pop up.

After you add the New Patient, you will see the New Account Number Assigned to the Patient. Each Patient has their own Account Number.

5.1 PATIENT INFORMATION SCREENS

Patient Information Screens are the key to the flexibility of your System. These Screens make it possible for you to Access and Modify an Entire Patient Record without switching back and forth between Menus. They include: General Information, Patient Ledger, Posting, Insurance, Etc.

Notice the top toolbar Menu at the top of the Screen. Use the Print Menu Option to Print Patient Forms; use the Window option to access different Patient Pop Up screens like: Insurance History, Billing History, Patient Notes, Etc.

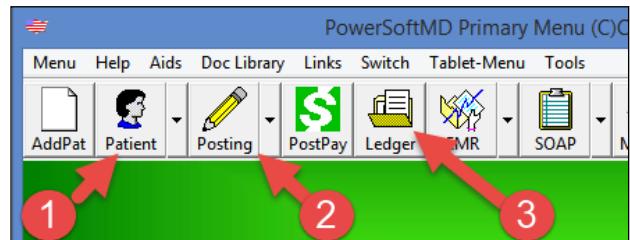
The top portion identifies the Patient.

The lower area is Variable. This is the Window that will change when you select the various patient screens by using the Icon buttons on the top of the screen.

You can switch patients' by using the binoculars **Find, Prev, Next, or Fam** Icons buttons.

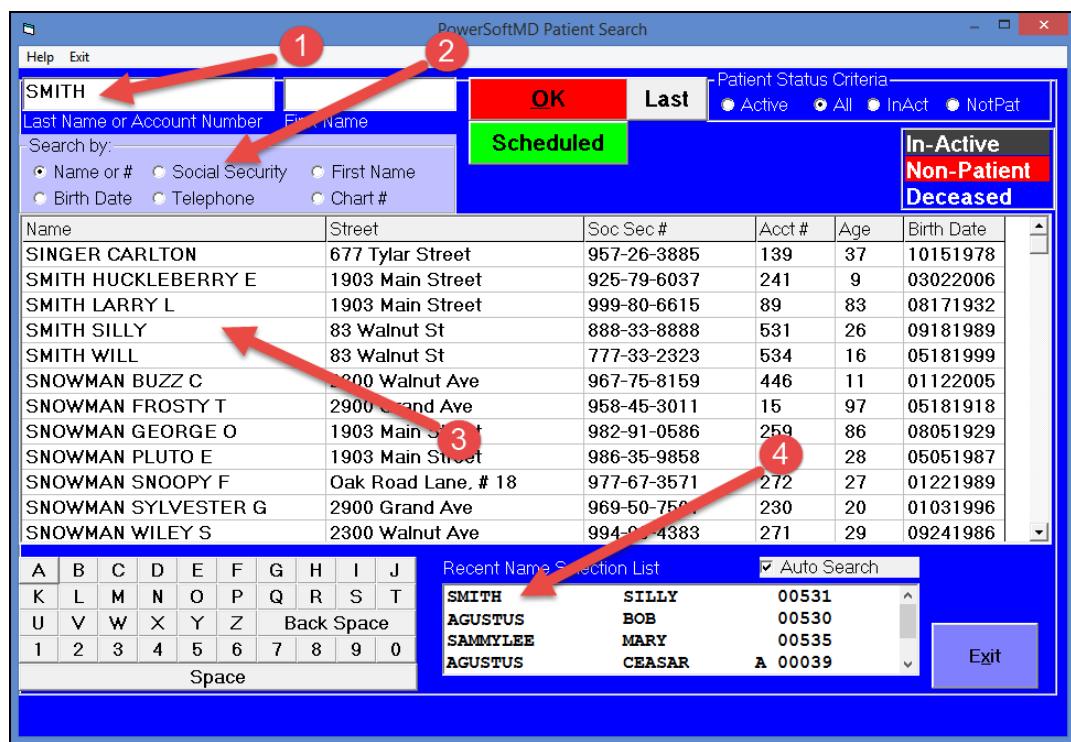
5.2 DISPLAY PATIENT screens

From the Primary Menu you may find or change Patient demographics using the **Patient Icon** button (1). Select Posting Icon button (2) to update Patient Ledgers, or look up a Patient's Ledger by selecting the Ledger Icon button (3).

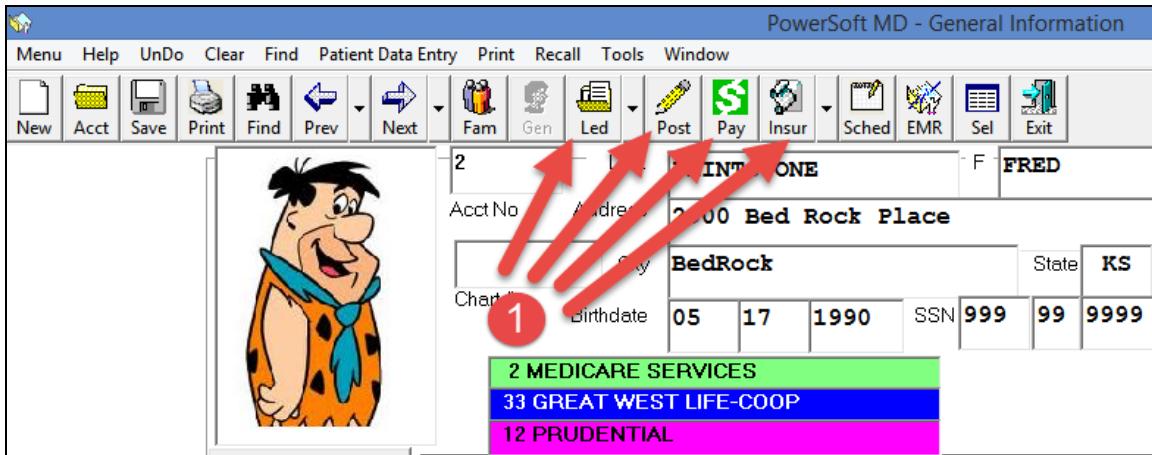


5.3 FINDING PATIENTS

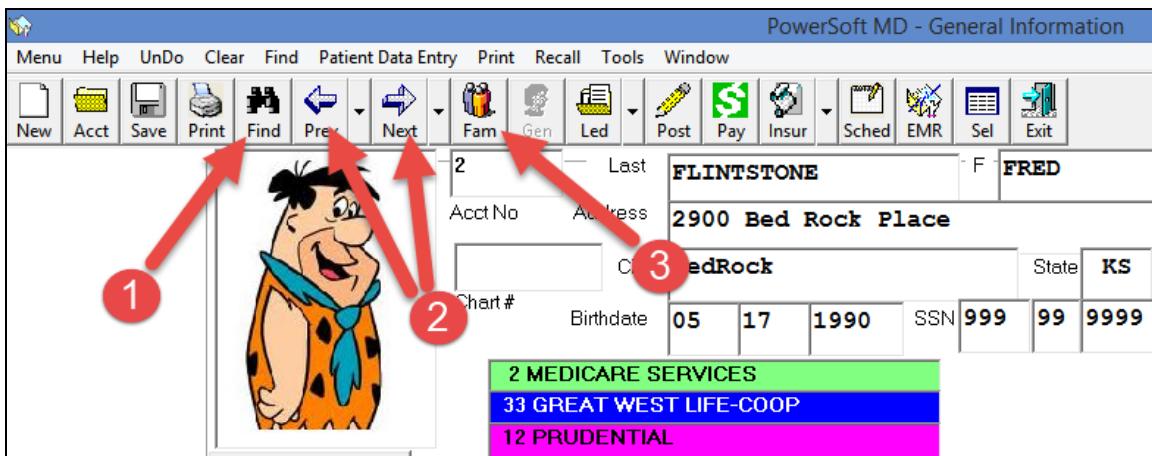
When you select a patient screen icon a search window will be displayed.



You can type in part of their name (1) or select another type of search (2). When you see the name, you want just click on the name entry line (3). You will also see a list of recently accessed patients (4) you can click on.



Once on a patient screen you may switch to **another screen** for the **same patient** by simply clicking the Icon button (1) of the desired screen.



To switch to **another patient** without returning to the Menu: you can select the **Find Icon** button (1) to display the search window, the **Prev** or **Next Icon** buttons (2) to move backwards or forwards alphabetically, or the **Fam Icon** button (3) to display a list of family members to select from.

When a Patient Screen is first displayed, the cursor will be located in the Acct No (Account Number) Data Field. You may switch to another patient without leaving the current screen in different ways.

Note: If you change data on a patient screen and switch to another screen or patient without pressing the **Save Icon** button, **no problem**, your changes will automatically be saved.

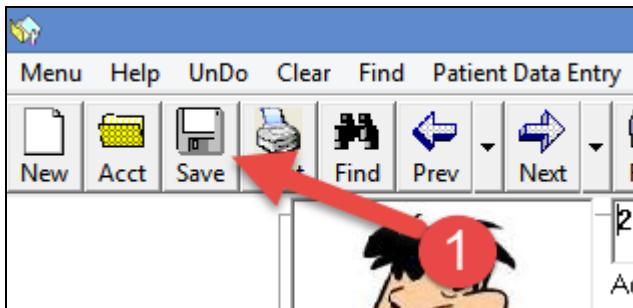
5.4 ADD/EDIT PATIENT INFORMATION

When a Patient Account is displayed, you may edit Information or perform specific office tasks. Refer to Chapter 2 for details on how to use the keyboard to change specific Data Areas on the Patient Screens.

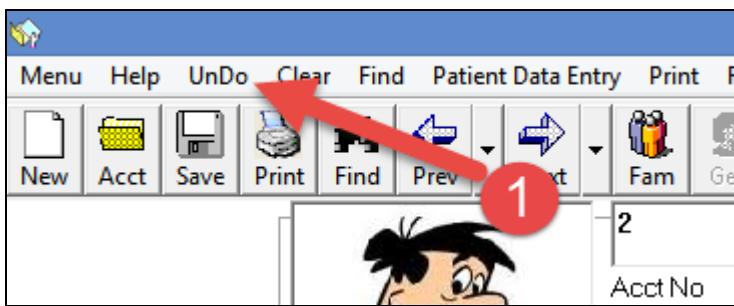
Remember that you may enter or change Data where the cursor is flashing. To move the cursor, use the Tab and other Keys described in Chapter 2.

You may **type** Information in all lower case; when you **Save Icon** button or switch screens the data fields will be automatically be capitalized for you.

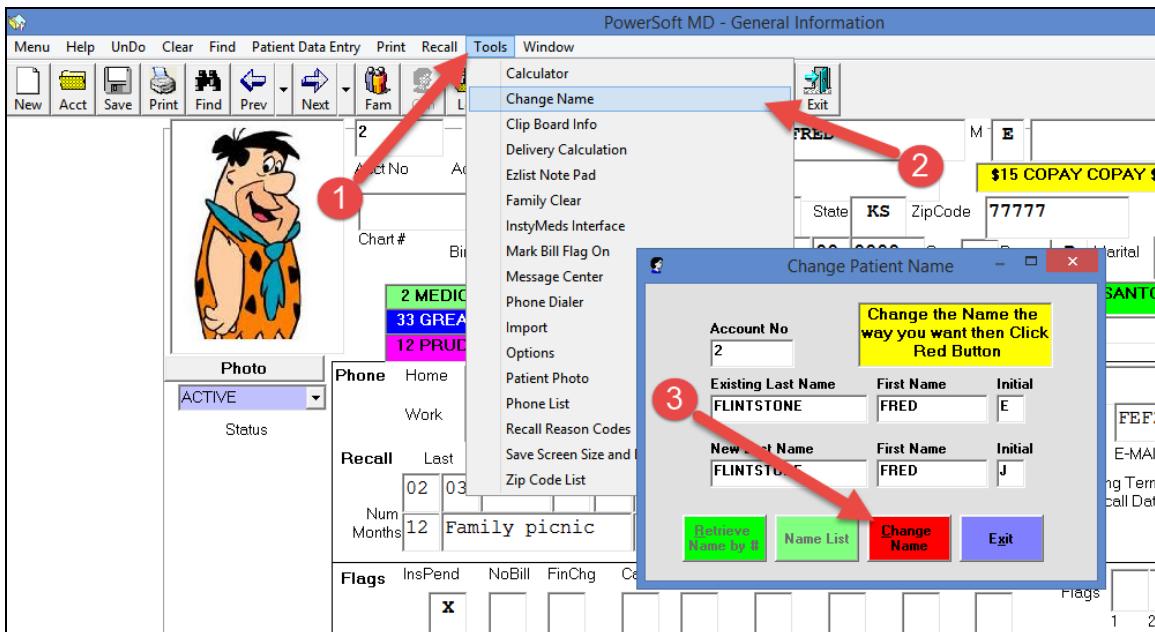
We recommend creating a fake patient like “Fred Flintstone” to practice with.



After making changes, you may press the **Save Icon** button (1) to store the Information on your Computer's hard drive. But, if you for forget to press the **Save Icon** button (1), no problem the information will automatically be saved when you exit or change screen.

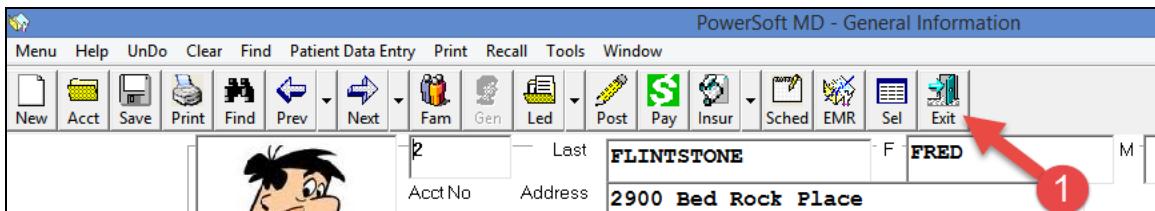


If you make a change and you want to **back out or reverse the change** then select the top toolbar menu **UnDo** option (1).



The Patient's Name fields are special; you cannot type over them to make a change. To change a patient's name, select the top toolbar **Tools** option (1), then select **Change Name** option (2), make the changes you need and press the **Change Name** (3) button.

5.5 EXITING PATIENT SCREENS

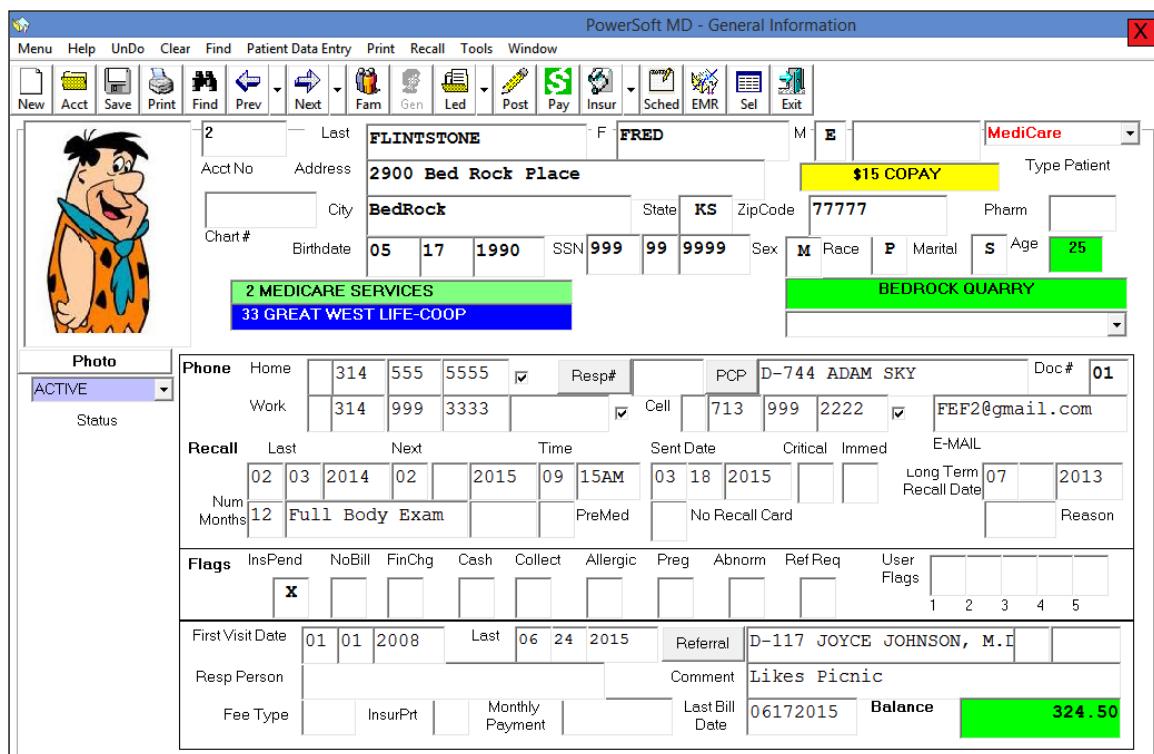


If you are finished with a patient, we recommend you use the Exit Icon button (1) to return to the menu.

6.1 GENERAL INFORMATION SCREENS

The Patient General Information Screen contains Patient Recall, Billing, and Referral Information. You may also **access** many Secondary Information Screens from here by **clicking** the Window Option on the Top Menu Bar. For example, Information can be stored on Screens given by these **Buttons**:

- Patient Notes
- Insurance History
- Billing History
- Appointment History and Future Appointment Dates



6.2 PATIENT GENERAL INFORMATION SCREEN

This Screen is displayed when the General Patient Information **Button** on the Primary Menu is **clicked**; it is also displayed if you **click** the Gen Button from the Top Menu Bar.

The Patient's Address, Birth Date, Social Security Number, and Gender can be **changed** on this Screen - *this is the only Screen where the Address Information*

can be **changed**. You can **change** the Name from this Screen by **clicking** Tools and **selecting** Change Name.

Most of the Data Fields on this Screen need little or no explanation. For quick Information about a Certain Field, **move the cursor** to that area and **press the F1 Key** for Help.

6.3 SUMMARY OF THE DATA FIELDS

Address Enter the Patient's Mailing Address to be used for various Statements and Recall Notices.

Resp Acct The Account Number of the Patient who is **responsible** for charges incurred by this Patient. The statement will be addressed to the Patient whose Number is **entered** here. This is how Family **connections** are made. Each Dependent should have the Account Number of the Patient **responsible** in this Data Field. This area will be **blank** on the Responsible Patient's Screen.

Doctor Number This is the Number of the Doctor who would normally see this Patient. The Doctor associated with each Number is **updated** from the Utility Menu, Company Name Option.

Recall The Last and Next Recall Dates are **automatically updated** by the Computer when certain Procedures are **Posted**. The Next Recall is incremented by the Number of Months shown for Recall Interval Months.

Recall Sent Date This Date is automatically **updated** when Recall Labels are **Printed** or a **Recall** Mail Merge File is created.

Time The time of the Next Recall Appointment. This is **automatically updated** if you have **Printed** or **Displayed** a Receipt for the Patient and **entered** a Recall Date and Time.

Preferred Appointment The Preferred Appointment Time or Day can be any **four** Letters or Numbers. Prints on the Recall Report and Work Ticket.

Pre Med A Two-Character Abbreviation for Pre-Medication. Prints on the Recall Report and Work Ticket.

Interval is the Recall Contact Time. To set a standard Number of Months use Utility Option Q, Defaults. You may also **change** this interval on the Individual Patient's Screen. This then **Prints** on the Recall Report and Work Ticket

Billing Last Automatically **updated** when a Statement is **Printed**.

Ins. Pending Automatically **updated** with an "X" when an Insurance Form is **Printed**. You will be asked before Printing Statements if you want Patients with Insurance Pending to have a Statement. The "X" is removed when a Payment is Posted with a Type Code of "I".

No Bill Any Letter you **enter** here will be changed to an "X" when Save is **clicked**. This tells the Computer **NOT** to Print a Statement.

Fin. Chgs. Any Letter you **enter** here will be changed to an "X" when Save is **clicked**. The Computer will **Post** a Finance Charge for this Patient, but only when the Monthly Finance Charge Option is **run**.

Cash Any Letter you **enter** here will become an "X" when Save is **clicked**. The Screen will **display** CASH, and CASH Message will be on the General and Posting Screens.

Collect Any Letter you **enter** here will be changed to an "X" when Save is **clicked**. The Screen will **display** COLLECTIONS. Statements and Recall Labels **will not** Print.

Allergy Click on this if the Patient has Allergies. **Document** the Allergies in the "Notes" Screen.

Pregnant Click on this if the Patient is Actively Pregnant. Also consider **documenting** the Pregnancy under the **OBTrack** Patient Screen.

User Flags There are five One Character Fields used to **select** Patients for Mail Merge Files, Reports, Labels or Forms. These are **defined** by your Office. For example, you might want to **select** the First User Flag to denote Patient Status, "T" in Treatment Plan, or "M" Maintenance Patient. **Write down** these Flag Categories and keep them near the Computer.

First Visit Date Automatically **updated** by the Computer when an Initial Visit or Code that triggers Initial Visit is **Posted**. It is also **automatically** filled in on the ADD NEW Patient Screen; of course, you can **override** it.

Comment Enter Individual Comments here. These **Print** on the Recall Report and Work Ticket. You can put extensive **Comments** on the History Notes Screen.

Referral The Name of the Person who **Referred** this Patient. If this Person is another Patient, **enter** P-Patient Account Number; for example, P-101. You can **select** from a List of Patients by using the Pat Referral **Button**.

If Referred by another Doctor, **enter** D-Referring Doctor Number; for example, D-25, from the List of Referring Doctors. Use the Docs Referral **Button** to **select**

from this List. This List is **created** using Utility Referrals Option. This Data Field is used to **Print** Thank You Letters and Patient Referral Reports.

Referral Flag This is a One-Character **Field** directly to the right of the Referral Area. This Area is **automatically** filled in with an "X" when a Thank You, Mail Merge File is created using Option L, Forms Menu.

Resp. Person The Name of the Person to whom you want to **send** a Statement, if *not* the Patient's Name. The Statement will be **addressed** to the Name entered here, but at the Patient's Address. Leave this area **blank** if you have **entered** a Number in the **Resp. Acct.#** Data Field. **Do not** put in the word "Same" or "Self" in this area.

Balance The Patient's Current Balance is **automatically updated** by the Computer when you **Post**. Use F6 or **Fam List Icon** to see the Family Balance.

Mo. Pay This is the Monthly Payment Amount. You may prefer to use the Terms Window. Refer to Appendix O for more information.

Interest Rate If you want to use an Individual Interest Rate, **enter** Annual Percentage Amount here. **GENERALLY NOT USED.**

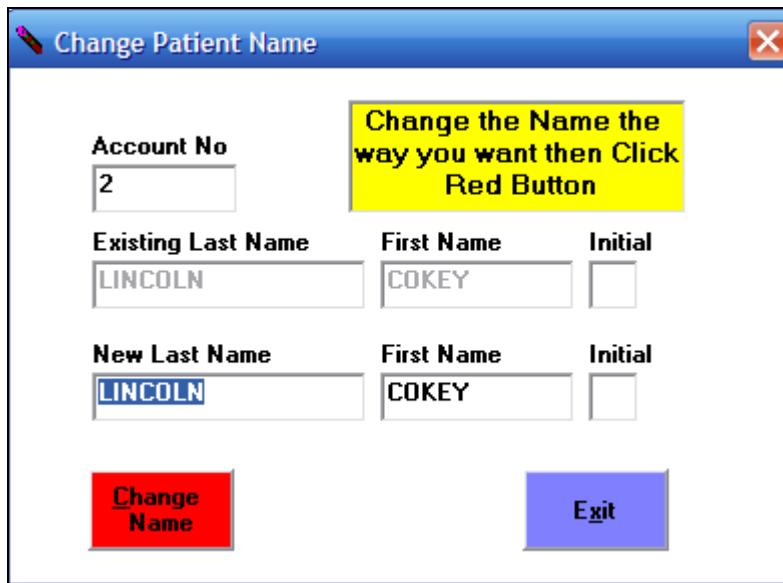
Fee Type This is the Number of the Fee Schedule from which **Charges** will be **Posted**. If **Blank**, Standard Charges will be used.

Insurance Print Carry over from the DOS Operating System is not used!

7.1 NAME CHANGES

There will be occasions when you'll want to **change** some Patient Names.

1. To do this from the top toolbar on the Patient's General screen "Tools" then "Change Name".
2. You will see the Patient's Current Name, **type** in their New Name.
3. Then **click** the Change Name **Button**. *Be patient*, this can take awhile.



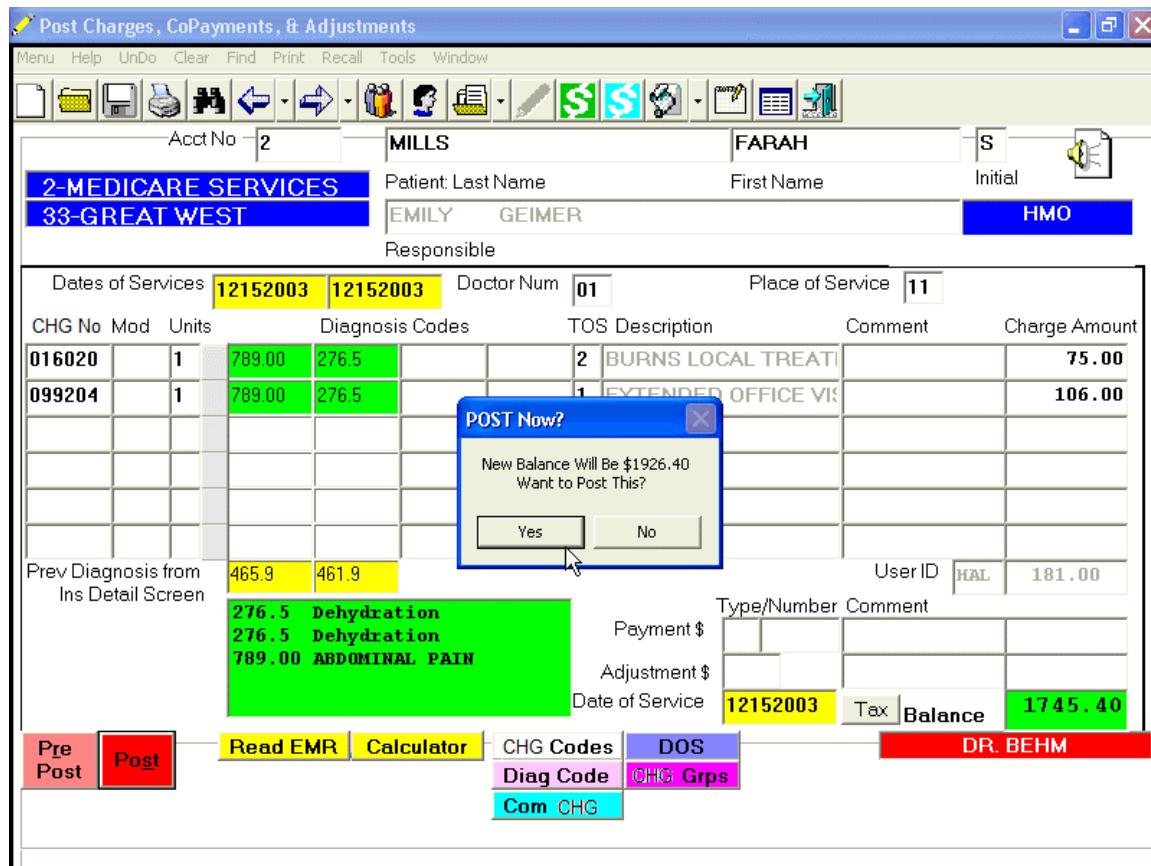
7.2 NAME CRITERIA

- A. Patient Last Names **cannot contain** Special Characters or *Embedded Blanks* within the First Three Characters
- B. Last Names **must begin** with *Three Alpha Characters*.

You can easily get a **List** of Patient Names from the Patient General Information **Screen**. To find the "O" Names for instance, **search** for the Last Name "NZ"; this will bring you to the end of the "N" Names. Then use **F7** to **scroll** backwards through the "O" Names, **writing down** the Account Numbers you want to **change**.

8.1 ACCOUNT POSTING

To **Post Charges, Payments, and Adjustments** use the **Post Ledger Screen**. This Screen is accessed from the Primary Menu by **selecting the Post Ledger Option**, or by using the “**Post**” Button on the **Toolbar** from the **Patient Screen**.



You may **Post Transactions** for as many Patients as you wish, without leaving the **Posting Screen**. But you may only **Post** up to six Charges, a Payment, and an Adjustment before **Posting** more. If you wish to **Post** more, then **Post** like this, in increments of six or less as many times as you need. You may **Post Dollar Amounts without** the Decimal Point and **without** Trailing-Zeroes in the Cents Column if you wish. **Examples:**

15.00 may be **Typed** as 15
15.50 may be **Typed** as 15.5

All the Entries will be **Posted** for the **same Dates of Service**. If you have **Separate Dates of Service** to **Post** you will need to **Post** Them in Sets, **changing** the Dates of Service each time. Any Payment and/or Adjustment **Posted** along with **Charges** will be **Applied** to the first **Charge** (this can always be **changed later** from the Ledger Screen before actually **Billing** the Patient).

8.2 POSTING CHARGES, PAYMENTS, AND ADJUSTMENTS

Find the Patient

When a Patient is **displayed, colored lines** appear above the **Chg Code Field** that **lists** the Insurance Carrier(s) Number(s) and Name(s). Four Methods will **find** Patients:

- A. Type** in the Account Number and **press** the **Acct Num Button**.
- B. Press** the Name List **Button** and **search** for the Patient by Name or *part* of the Name.
- C. If you are on a Family Members Record, press** the **Fam List Button** and **select** from a Family List.
- D. Use the Next and Previous Patient Buttons to scroll** forward and backward alphabetically.

Charges and Estimates

You can **combine** Charges, a Payment, and an Adjustment all together before you **Pre-Post** and **Post**.

1. The Doctor Number will be **automatically** taken from the Patient General Information **Screen**, but you can **set** a **default** Dr. to **activate automatically**. To pick the Number of the Doctor, **use** the Primary Menu “**Options**” **Button**, **change** the Doctor Number for **Default Posting** to “**99**”. The reason for the **Options** Doctor **Number** is to **allow** each Work Station to be **set** to their own Doctor, if they wish. This **Option**, the Doctor Number, must be **set** for each individual Work Station.
2. The Place of Service will **default** to **Office "11"**; you may **override** this. Just **click** on it for a List of **POS** to **select** from. You can **activate** a **Posting Screen Option** by using the “**Tools Menu**” **selection**, then **Options Setup**, the password is “**secret**”, mark the “Pop Up Hospital Dates with **POS of 2X**”. This way, when Posting a **POS of 21** you will get a **Pop Up** to **set** the Dates and other Hospital Info.
3. **Type the Chg Procedure Code, or Shorthand Code**, under the **Code Column**.

You may also **look up** Chg Procedure **Codes** by using the “**Chg Find**” **Button** or **double clicking** on the Chg **Code Field**. You can also **set up** commonly used **Codes** with the “**Chg Codes**” **Button**.

4. **Fill in the Modifier and Number of Units**, if required.
5. **Fill in the Dates of Service or leave them blank** if they are the **same** as the Computers Date.
7. **Press Pre-Post Button (or F3 Key) to fill in Description and Charge Amounts.**
8. If the Amount of the Charge **is not** what you want, then **click on the Amount and change it**. Charges need not be aligned or have decimals in Dollar Amounts. Remember each time you **use** the “**Pre-Post**” Button your Fee Schedule Amount will be brought up, so “**Pre Post**”, **override** the Amount, then “**Post**” in this specific order.
9. **Press the Post Button (or F4 Key)**. You will be prompted if you want to proceed and actually **Post** to the Ledger.

Payments

A Payment may be **Posted** at the same time as Charges, or **separately**. These Payments are **automatically applied** to the **Charge being Posted**.

1. **Override Doctor #**, if desired.
2. **Move the cursor to Payment**, then **type the Amount**.
3. **Tab the cursor to Type**, then **Type the Appropriate Code**:

P = Personal Check
\$ = Cash
C = Charge Card
IP = Partial Insurance Payment (**does not** remove Insurance Pending Flag)
I = Insurance Payment, **removes Insurance Pending Flag**
E = Electronic Insurance Payment
O = Other for Money Order, Etc.
X = XCharge payments (Electronic Charge Card)

4. **Tab to Number** and **enter** up to **4 Digits** of either the **Check Number** or the **Charge Card Company, Etc.** Note: You should **Post Insurance Payments** on the **Payments Screen**.
5. Click on the Date of Service and **enter** the **DOS** that is being **Posted** for.

6. Click the **Post Button** (or **F4 Key**). You will be prompted if you want to proceed to actually **Post** to the Ledger.

Adjustment

An **Adjustment** may be **Posted** at the same time as **Charges** and / or a **Payment**.

1. **Override** Doctor #, if desired.
2. **Move the cursor to Adjustment**, then **type the Amount**. A Positive Adjustment will **decrease** the Balance, like a Payment. A Negative Adjustment will **increase** the Balance, like a Charge. **Positive Adjustments are assumed**; you need not **enter** the "+" Sign. Negative Adjustments would **require** the "-" Sign.
3. **Fill in the Adjustment Type Number**. You may **click the Adjustment Type Field** to **select** from a **List of Adjustment Types**.
4. **Click the Post Button** (or **F4 Key**). You will be prompted if you want to proceed to actually **Post to the Ledger**.

8.3 POSTING DATE CHECK

Make sure that you are **using the correct Date**. The Date you **entered** into the Computer when you started, is **checked** against the **last Date you Posted**. You **cannot** go *backward* on Dates. The first time you **Post on a new Date**, you will be asked to **double check the Date**, before you continue.

8.4 HINTS FOR POSTING

- A. The Posting Screen will show a **color message** if a Patient is either in **Collections** or is a **Cash Only** Patient.
- B. To **Post** from an **Alternate List of Charges**, enter the **Number of the Fee Schedule** you wish to **Post** from, in the **Fee Type Data Field** on the Patient's General Information Screen. These **Alternate Fee Schedules** are set up using the **Fee Schedules Option** on the Utility Menu. You may create up to **999 Fee Schedules**.
- C. When a Doctor **does work on another** Doctor's Patient(s), just **override** the Doctor Number on the **Posting Screen**. It will only override for that **one Posting**.
- D. **Post Exams** even when you **don't Charge** for them. This can be done by using a **Charge of 0.00**. This will **track** Office productivity

accurately. Or if you prefer, **Post the Charge** and an **Adjustment to Zero the Charge**. Use an **Adjustment Type Code** that you have defined for "Courtesy Service."

- E. When Insurance Payments are still due for a Patient, **Post** an Insurance Payment with a **Type Code of "IP"** for partial Payment. This will tell the Computer to keep the **Insurance Pending Status** for this Patient.
- F. When a Patient is **turned over to a Collection Agency**, enter an "X" in the **Collections Data Field** of the General Information Screen. **Post** an **Adjustment** with a **Type Code** that you have selected to mean "**Collections**." When payment is received, **Post a Payment** and a **Negative Adjustment**.

8.5 STEP BY STEP INSTRUCTIONS.

Posting Patient Visits, Post Charges and Co-Payments.

1. From the Primary Menu **select Post Treatment (Visits)**.
2. From the Super-Bill or Work-Ticket get the **Account Number** of the Patient that has been seen. **Type in the Account Number**, or if you do not know the Account Number, **type in the Name of the Patient** in the Name Field of the PowerSoftMD Name Search. **Select ok** and **choose the Patient** that was seen.
3. **After selecting the Patient**, this will bring you to the **Post Charges and Co-Payments Screen**. Dates of Services will **automatically default** to the day that you are Posting Charges. If you have more than one Doctor then **click on the Doctor Num Box** and **select or type** in the appropriate Doctor Number. Lastly, Place of Service is **defaulted as 11 Doctors Office**, but this can be changed by **clicking in the box** and **selecting the appropriate Code**.
4. **Double click** on the **Chg No. Box** or **select the Chg Code Button** down at the bottom of the Screen. The **Free Search Box** will appear. **Type in the name of the Chg Code** that you are searching for, and **select Search**. **Select the Code** that you are searching for. This will automatically fill in the **Chg No Box** with the **Chg Code Number**.
(Note: if you know the **Chg Code** you can automatically **enter the Code in the Chg No Box**. Also, while searching for Chg Codes using the **Free Search Option**, the most **commonly used Codes** will generate a List that you **can choose from** on the right. You can refer to that List, instead of doing a search. Moreover, you can use the **Com ChgS Box** and select from your **most common Chg Codes** that you can create. Lastly, if you have set procedures that are commonly used for many Patients you can use the **Chg Grps Option**.)

A. Setting up Com Chg Option (used for a Commonly Used Procedure):

1. Choose the **Com Chg Button**
2. Click on the **Update Button**, this will allow you to **add or change** the already existing **Chg Modifier, and Diagnosis Codes**.
3. Once you have the **Codes** set, **click on Save** then **click on the X** to close. Now you can just **click on the Commonly Used Procedure** and it will automatically fill in the **Chg No, Mod, and Diagnosis Boxes**.

B. Setting up Com Grps Option (used for more than one Commonly Used Procedure):

1. Choose the **Chg Grps Button**.
2. This will bring you to the **Chg Grp Code selection**. In order to add a New Group **click on Update**.
3. **Enter the password Secret** then **select OK**.
4. This will bring you to the **Chg Group Definitions**. **Create a Name** in the **Definitions Box** for the **Group of Procedures** that are commonly used when seeing a Patient.
5. **Enter in the Chg Codes, Modifiers, and Diagnosis** that are commonly used within the Group

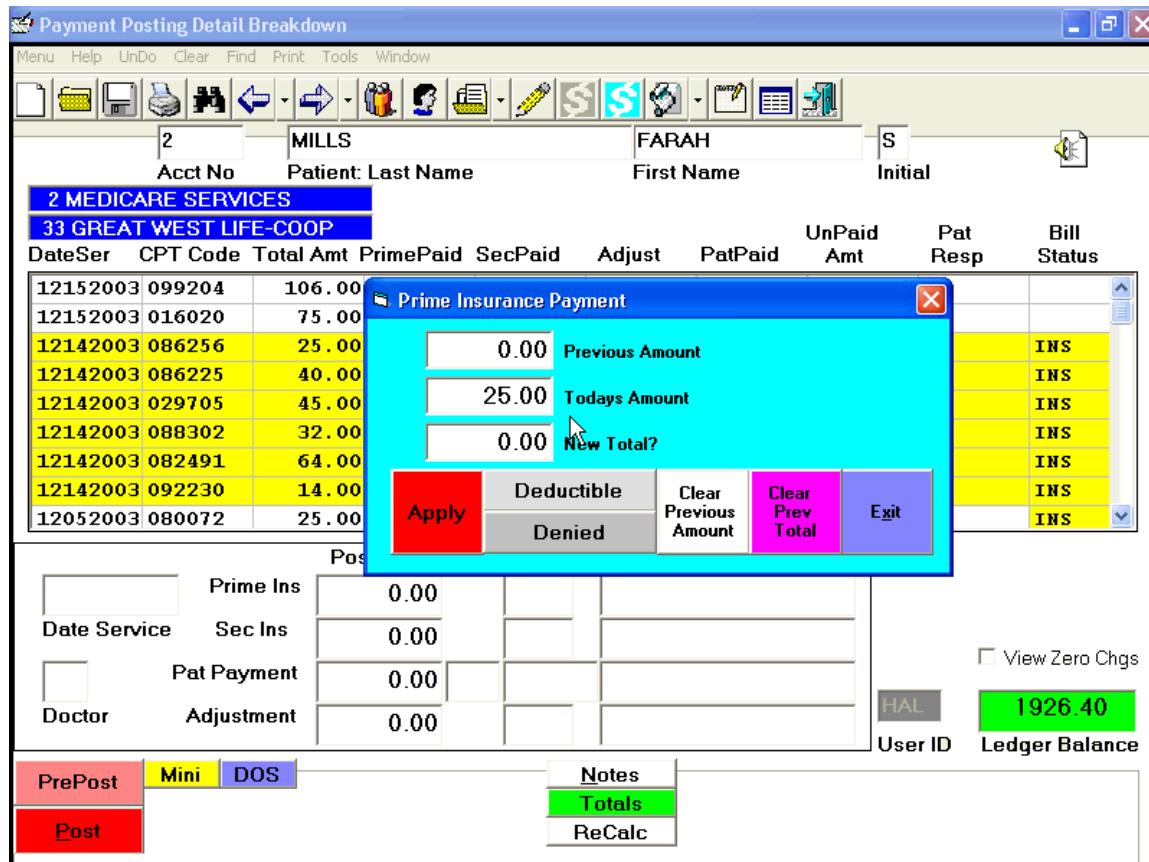
6. **Select Add One**, which will **save the Group** under the **Definition** that you named it, and place it into the **List of Existing Entries List**.

7. **Select Save, then Exit.** This will bring you back to the **Chg Grp Code Selection**. You should see the Group that you just created. When you **select the Name(s) created** they will automatically fill in the **Chg No, Mod, and Diagnosis Boxes**.

5. **Double click** on the **Diagnosis Box** or **select the Diag Code Box** at the bottom of the Screen. The **Diagnosis Search Box** will appear. **Type in the Name** of the **Diagnosis** and **select Search**. **Select the Diagnosis** you are searching for. The **Diagnosis Code** will automatically fill in the **Diag Box**. If you have more than one **Chg Code with the Same Diagnosis** you would only have to **enter the Diagnosis Code** one time. When **selecting Pre-Post**, the **Diagnosis Code** will automatically fill in the **blank Diagnosis Spots** for the **Chg Codes** that are the same.
6. If a Patient has a **Co-Pay**, **click on the Type Box** and **select the type of Payment** that is being made. If **paying by Check**, you can **enter the Check Number** of the **Check** in the **Number Box**. Otherwise, you can leave this Box **blank**. Next, **enter a Comment**, otherwise you can leave this **blank** also. Lastly, **enter in the Dollar Amount of the Co-Payment**.
7. If there is an **Adjustment of any kind**, for example, a **Discount** was issued, **select the appropriate Adjustment Code** (Adjustment Codes can be **updated/added** through Utilities Menu, Adjustment Codes). **Enter a Comment** in the Comment Field. Lastly, **enter the Amount of the Adjustment in the Charge Amount Field**.
8. **Select Pre-Post** to make sure you do not have any **mistakes**. If everything is fine, **click Post**. You will be **prompted to 'Post Now?'** with the **new Balance**. **Select Yes**, to continue. **The Charges will disappear** and the **Balance will be Posted** in the lower right-hand corner in **Green**.

8.6 DETAIL LEVEL POSTING

When **Posting Insurance Payments, Patient Payments, and/or Adjustments**, you can **Post** them and break down the **Detail Information** by **Chg Code** on this Screen. This will provide a much greater level of Detail for **Billing and Collection** follow up.



Once you have **retrieved** the Patient Record.

1. **Click on the Prime Paid, Sec Paid, Adjust, or Pat Paid Field** on the Line of the **Chg Code** you want to **credit Payment**. You can only **Post one Date of Service** at a time. If you need to **Post Payments** for **multiple dates of Service**, just **Post the first one**, then the **second**, etc.
2. Automatically, an **“Amount Breakdown Box”** will pop up to let you **type in the Dollar Amount** to be applied.
3. When you **press the “Apply” Button** the **“Amount Breakdown Box”** will **disappear**, you will see the **Dollar Amount** appear in the **Box** you **clicked on**, and you will see the **Associated “Post Amt” Box** on the bottom of the Screen fill in with the **Dollar Amount**.
4. **Repeat Step 3** above to enter all the **Dollar Amounts and/or Adjustment Amounts** you wish to **record**. As you do this, the various

“Post Amt” Boxes at the bottom will automatically change to the **Total Amounts** you have **entered**.

5. If are entering any **Adjustments** be sure and **click on the Number Field** on the **Adjustment Line** at the bottom of the Screen to **enter the Adjustment Code Number**.
6. If you are **Posting** any **Patient Payments** you must **click on the Type Field** on the **Payment Line** at the bottom of the Screen to **select the Type of Patient Payment**. If you are **entering** a **Patient Check** you may also **enter the Check Number** in the **Number Field** on the **Payment Line**.
7. You can **place a Comment** on any one of the **Payment Lines** at the bottom of the Screen.
8. Once all the Data you want to Post is **entered**, **press the Pre-Post Button**. If there are any **errors**, an **Error Found Message(s)** will be **Displayed** describing them.
9. Note the “**Unpaid Amt**” Column, you can **click on the “Bill Status” Column** if you wish to **indicate the Status of the Charge**, for example should the Patient be Billed? You can always **indicate and/or change this later** from the Patient Ledger Display.
10. Finally, **press the Post Button to Post the Payment(s)** and update the **Patient’s Ledger** to reflect the **Payment and/or Adjustment Breakdown**.

There are **multiple ways** you can **Post Insurance Payments**.

- ❖ You can simply **Post the Payment** against the **Balance** and **Specify a Date of Service**.
- ❖ You can **set the Posting Screen to prompt you** with a Screen to **break down the Insurance Payment** directly against the **Specific Charges**, indicating how much the Patient **owes Per Charge**. **Set the Posting Screen** for this **Prompt** by using the “**Options**” **Button**.
- ❖ You may use the “**BlkChks**” **Insurance Posting Screen** to **break down the Payment** with a **Comment** on the **Total Amount Considered**, **Amount Not Allowed**, **Deductible Amount**, **Co-Payment**, and what was **actually Paid**.

You may want to talk to Data Tec to review the pros and cons of each Option.

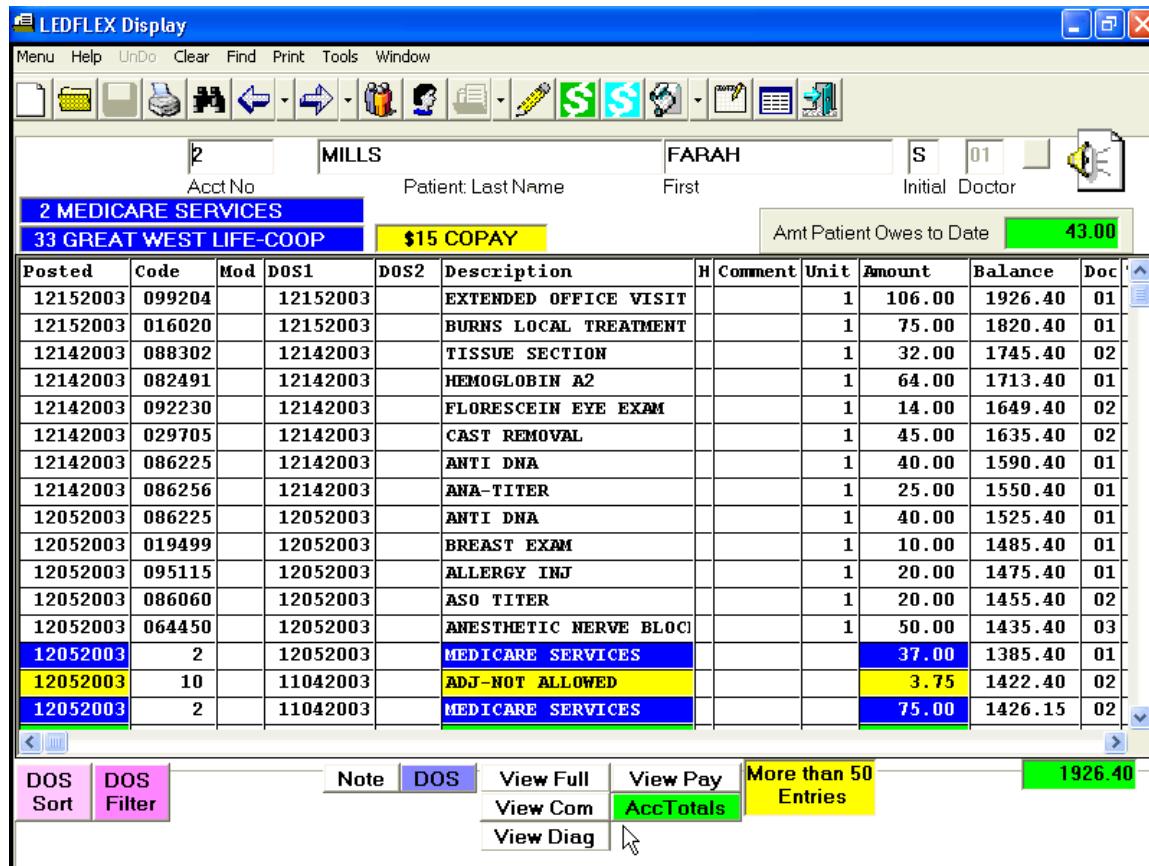
9.1 PATIENT LEDGER SCREEN

The Patient's **Ledger** shows you all the **Transactions Posted** for the Patient. To reach it, **select the Display Ledger Option** from the Primary Menu, or the 'Led' Button at the top of the Patient Screen.

Sixteen Transactions are shown on each Screen. The most **recent** are **listed first**. **Click the Down Button** to **scroll backward** through the Transactions history; **click the Up Button** to **scroll forward**.

You may **change** a Data Item by **clicking on the Box to change it**. You will be **prompted to enter the new value**. But you **cannot change** the Posting Date or Dollar Amounts.

Transactions Posted **incorrectly** can be **deleted** on the **same day** they are **Posted** by **clicking** the **Posting Date**, then following the **On-Screen Prompts**.



The screenshot shows the LEDFLEX Display Patient Ledger screen. At the top, it displays the patient's information: Acct No 2, Last Name MILLS, First FARAH, Initial S, Doctor 01. Below this, it shows the service details: 2 MEDICARE SERVICES, 33 GREAT WEST LIFE-COOP, and a \$15 COPAY. To the right, it shows the amount patient owes to date as 43.00. The main area is a table of transactions:

Posted	Code	Mod	DOS1	DOS2	Description	H	Comment	Unit	Amount	Balance	Doc
12152003	099204		12152003		EXTENDED OFFICE VISIT			1	106.00	1926.40	01
12152003	016020		12152003		BURNS LOCAL TREATMENT			1	75.00	1820.40	01
12142003	088302		12142003		TISSUE SECTION			1	32.00	1745.40	02
12142003	082491		12142003		HEMOGLOBIN A2			1	64.00	1713.40	01
12142003	092230		12142003		FLORESCEIN EYE EXAM			1	14.00	1649.40	02
12142003	029705		12142003		CAST REMOVAL			1	45.00	1635.40	02
12142003	086225		12142003		ANTI DNA			1	40.00	1590.40	01
12142003	086256		12142003		ANA-TITER			1	25.00	1550.40	01
12052003	086225		12052003		ANTI DNA			1	40.00	1525.40	01
12052003	019499		12052003		BREAST EXAM			1	10.00	1485.40	01
12052003	095115		12052003		ALLERGY INJ			1	20.00	1475.40	01
12052003	086060		12052003		ASO TITER			1	20.00	1455.40	02
12052003	064450		12052003		ANESTHETIC NERVE BLOC			1	50.00	1435.40	03
12052003	2		12052003		MEDICARE SERVICES				37.00	1385.40	01
12052003	10		11042003		ADJ-NOT ALLOWED				3.75	1422.40	02
12052003	2		11042003		MEDICARE SERVICES				75.00	1426.15	02

At the bottom, there are buttons for DOS Sort, DOS Filter, Note, DOS View Full, View Pay, View Com, AccTotals, More than 50 Entries, and View Diag. The balance is also displayed as 1926.40.

Scroll left to right, or up and down. In addition, click the "View" Buttons to quickly Shift Views without scrolling.

9.2 LEDGER CORRECTIONS

To **correct** items Posted on a *prior date* do the following:

1. **Post an Adjustment** on the Post Ledger Screen to **correct the balance** to the value it **should be** if the erred entries did not exist.
2. Next, **Post new**, correct Entries for those in **error**.
3. Finally, on the Ledger Display Screen, **click in the H Column** on each item **posted in error**, as well as for the **adjustments** you just posted. A **red letter "H"** appears in this Column. It means the entry is **hidden** and will not be shown to Patients on Documents or Reports. These **H Entries** will also be **ignored** for Statistics and Insurance.

If an Item was an Estimate Charge a **Black Letter "E"** will be in the **E (Estimate)** Column. These **Estimate Charges** do not affect the Patient's Balance. They are used only to **submit** Estimate Insurance Claims.

10.1 DELETING PATIENTS

WARNING: *We recommend that you **do not actually delete** any Patient for at least **three years** after their **last** Ledger Transaction. This keeps their statistics in the Computer for **year-to-year comparisons**.*

When you **delete** a Patient, you **lose all record** of them in the Computer. This means that their **Production and Collection Statistics** are also **removed**!

What do you do **instead of deleting** them? If you want to make sure you don't send any correspondence to a Patient who for any reason is no longer considered a Patient, **then**:

1. Mark the Account with a **Special Code** in one of the **User Flags**. For example: a "D" in **User Flag 5**.
2. On the Patient Notes Screen, **copy** their Address and Telephone Numbers, along with the **reason** they should be **deleted** after the three-year period.
3. On the Patient's General Screen, put the phrase "******DO NOT MAIL*****" in the street address area; put "**NO MAIL**" in the Zip Code. **Zero-out** the Next Recall Date and the Recall Interval. **Remove** the Responsible Account Number.
4. On the Patient's Appointments Screen, **blank-out** their Next Appointment Date.
5. **Remove** their Balance with an **Adjustment**.
6. **Remove** any **future Appointments** from the Schedule System.
7. On the General Screen, **change** their Status to "**Inactive**".

Once a year, **review** the Patients marked to be Deleted. **Determine** which ones you really want to **delete** (because it has been three years or longer since any account activity). Then, **print** the Ledgers for the Patients you chose to **delete**.

To **delete** Patients, use the Utility Menu, **Delete Patient Option**. Before Patients can be **deleted**, they must have **zero balances**. Their Ledger Report should be **printed**; this allows manual **data recovery** in case of **accidental deletion** of the Patient(s).

When **deleting** Patients there are several things to keep in mind:

- A.** You can only **delete** a Patient if they have a **zero balance**. If you must **zero-out** the balance, **post** an Adjustment **equal** to their balance before using the **Delete Option**.
- B.** Before a Patient is **deleted**, **print** their Ledger. To do this, use the Ledger Display Print **Button**. This will **print** on paper all the information the Computer has about the Patient. Keep this **report** in the file folder.
- C.** Keep in mind that **deleting** a Patient also **deletes all** associated Transactions. This means that any **Production Reports** should be run prior to **deleting** any Patients.
- D.** A Patient **cannot** be a family member. If the Patient has been **entered** as a family member, **remove** the connection by **typing** spaces in the **Resp. Acct.# Field** on the General Information Screen.

Alternatively, you can **archive** a Patient instead of **deleting** them. **For help with this Option call Data Tec.**

11.1 INSURANCE

There are **Four** Main Insurance Screens:

Primary for Primary Insurance coverage Information

Secondary for Secondary Insurance coverage.

Third for a Tertiary Carrier.

D. Detail for detail Claim Information, like Hospital dates.

First, **select** the desired Patient from the General Information Screen. Next, **click** the 'Insur' Button. The Primary Carrier Information will be **displayed**.

11.2 PRIMARY, SECONDARY & THIRD INFO SCREENS

To **switch** from the Primary Coverage Screen to the Secondary, just **click** the Secondary Button. Likewise, on the Secondary display, **click** the Primary Button.

To **switch** to Detail Information, **click** on the Details Button.

11.3 DATA FIELDS

Resp Acct# - Account Number of the Patient the Insurance is under the Name of. If another Patient is **responsible**, their Insurance Screen must be **completed**, with their Account Number and Relationship Type filled in. If the Patient is **responsible** for their own Insurance, this field **must be blank**.

Relationship - The **Code** signifying the relationship between this Patient and the Responsible Patient: **S = Spouse** **C = Child** **M = Self** **O = Other**

Insured Persons Name - The **Name** of the Person with coverage.

Soc Sec No - The **Social Security Number** of the Person with coverage.

Birthdate - The **date of birth** of the Insurance Subscriber.

Policy Number - The **Primary Policy Number** of the Insured Person.

Group - The **Group Number** of the Insured Person.

Anniversary MM YYYY - The **2-digit Month & 4-digit Year** of the Policy Anniversary.

Carrier Number - The **Number** assigned to the Insurance Company and kept in the Insurance Company file. Click the **Ins Find Button** to **search** for Insurance Carriers. Consider using Zip Code or P.O. Box for searches.

Payment Profile No. - The **Number** used to **identify** the Insurance Payment Plan for this Patient. Use the **Utility Menu, Ins Payment Profile Option** to create and update this Info.

YTD Submitted \$ - The **Dollars submitted**, year-to-date, **to the Carrier** for this Patient.

YTD Paid \$ - The **Dollars paid**, year-to-date, **from** this Carrier.

Employer Num - The **Employer** Name and Address. This can be **filled in** using the **Empl Find Button**. The Employer File is **created and updated** from the **Utility Menu, Employers Option**.

Work Telephone – The **Work Telephone Number** for the Employed or the Policy Holder.

Primary Claim Dates - These are the **Claim Dates** when the **Real and Estimated Charges** were last **Printed** or sent **Electronically**. These Dates are **automatically updated**.

NOTE: When **Printing** Forms, the **Date of Charges** will be the **same** as the **Posting Date**, unless the **Date of Service** was **entered**. If a **Date of Service** was **entered**, it will be used on the Insurance Form.

11.4 DETAIL INFORMATION SCREEN

This **Screen** allows you to **fill in** other **Detail Information**. You should be sure to **fill in** the **Signature On File Date Field** so you can be paid directly!

The screenshot shows the 'Patient Insurance Details' window. The 'Insurance Detail Info' section is highlighted. It contains fields for Medicare, Medicade, Champus, ChampVA, Group, FECA, and Other. Under 'Signature On File Dates', the fields show '09121995' for both the first and second dates. The 'Status' section shows 'Single' with a checked box. The 'Employment' section shows 'Employed' with a checked box. The 'Condition Due to' section includes 'Employment' (Yes checked), 'Auto Acc.' (Yes checked), and 'Other Acc.' (Yes checked). The 'Dates Unable to Work' section shows '11042003' and '11042003'. The 'Hosp Dates for Cur Ser' section shows 'Yes' with a checked box. The 'Ref Doc' section shows 'ADOLPHUS FAVORDS' and '905'. The 'Medicaid Resub Code & Original Ref' section shows '390238484'. The 'Hosp Num' section shows '2 ST. ELIZABETHS'. The 'Diagnosis' section shows '465.9' and 'Upper Respiratory Infe' in a yellow box, followed by '461.9' and 'SINUSITUS' in another yellow box. The 'Comments' section is empty. At the bottom are buttons for 'Primary', 'Posting', 'Comments', and 'Diagnosis'.

To choose No/Yes for an Item, simply **click** in the **Box**.

You can **click** on Date Fields to use a Pop-Up Calendar to **fill in** Information.

You can **set up** Diagnosis Codes and Comment Codes (Numbers) that can be **filled in**. **Set up** both **Lists of Codes** from the Utility Menu. You can **double click** these Fields to use a Search Feature to **insert** Proper Codes. Insurance uses the Diagnosis Codes on each **individual charge item** from the Ledger. These Diagnosis Codes are for your **reference**.

You can **access** this Screen directly from the **POSTING** Screen using the **InsDetail Button**.

11.5 OTHER INSURANCE INDICATORS

In addition to the Insurance Screens, there are **Data Fields** accessed from the General Information Screen that **affect** the Insurance Status.

InsPending

When the **Insurance Pending Flag** is on, an "X" appears after the **printing** of an Insurance Form for **Real or Estimated Charges**. The "X" is removed when a Payment with a Type Code of **I** is Posted. If you Post a **payment** with a Type Code of **IP**, for Insurance Partial Payment, this **Flag** is not changed.

Insurance Print Flag

This **field** is an older item from the DOS PowerSoftMD System. **It is generally ignored.**

Other Indicators That May Affect the Printing of Charges

Any **Charges** that have been "**hidden**" will not Print. **Hidden Charges** show a **Red "H"** in the left column of the Patient's Ledger Screen. **Hiding Charges** are discussed in Chapter 16.

11.6 PRINTED INSURANCE CODES VS CHARGE CODES

On the **Fee Schedule** there is a **Column** that is generally **filled in** with the **same Code** as the **CHG Code**, the **Insurance Print Column**. But it doesn't have to be. For example. **CHG CODE 761120** could be printed as **WWWXYZ**. Any **Charges Posted** that have the Word "**NONE**" in the Insurance Print Column, will not be **printed** on Insurance Forms at all.

11.7 PRINTING INSURANCE FORMS

The easiest way to **Print** an Insurance Form for a Patient is to be on the Patient's Record and **click Print** at the Top Menu and select "**HCFA 1500 NPI Red**" from Insurance. **Fill in the desired Information** and **click the Print Form Button**.

To **print Batch Forms**, use the Forms Menu, **Insurance Forms NPI Paper Primary Option**. When you **Post** a Patient who has Insurance, their **Account Number** is **automatically added** to this Screen, unless their Carrier is **marked** to be sent **Electronically**. It makes **Batch Printing of Claims** easy. You can also **activate** a **Feature** that **will not add** the Claim to the Batch Print Screen, if the Charges total **Zero Dollars**. Use the **POSTING Screen Options Button** to **activate** this.

When an Insurance Form is **printed**, the Claim Date and the Claim History Data Fields on the Insurance Screen and General Information Insurance History "InsHist" **are automatically updated**.

The **Insurance Pending Flag** on the General Information Screen is filled in with an "X".

11.8 WHEN A FORM DOES NOT PRINT

If you **cannot** get a Form to **print**, and you have been successful in **printing** other Insurance Forms, **check** the following:

Make sure the **Range of Date** on the **Print Insurance Screen** are proper; pay close attention to the **Year**!

If only certain Charges **won't print**, check the **Fee Schedule**; see if the word "**NONE**" is in the **Insurance Print Column**.

Also **check** the Patient's Ledger to make sure that Charges have **NOT been** "**Hidden**".

If this **does not** solve the problem, **check** the Insurance Screens for the Dependent and the Responsible Patient to make sure that all the Information has been **filled in** correctly.

11.9 REPRINTING INSURANCE FORMS

This is easy, just **override** the Range of Date on the Print Insurance Screen to **one day before** and **one day after** the Charges you want to Print. Remember to use the **Date of Service**.

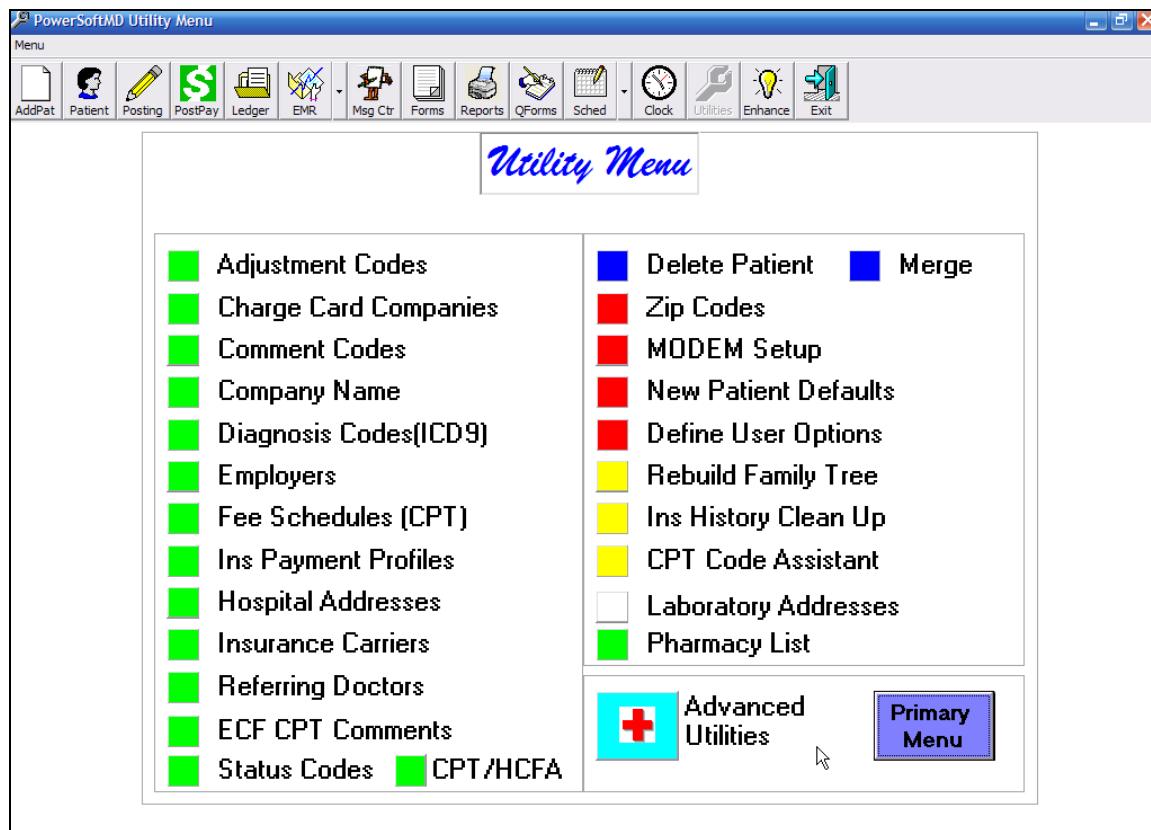
11.10 ARCHIVING Carrier Information

you **change** Insurance Carriers for a Patient you will **automatically be asked** if you want to **Archive** the Policy Information. If the Carrier is **changing** you should **Archive** the old Carrier Information. If the Carrier was just an **error** and you are **replacing** it, don't **Archive** the original Carrier. This way, PowerSoftMD will **keep** up to 10 previous Carrier and Policy Information Histories in case you need to **Re-File** any old Claims.

12.1 UTILITY MENU

Utilities are the nuts and bolts of your System. This is where the basic Charge, Insurance and other **critical** Files are **created and updated**. In addition, there are several Options that can be **customized** for your Practice.

Some Utility Menu Options are extremely powerful, and care should be taken to **grant Security** only to those Users that **need access**. The Advanced Utility Menu Option allows you to **setup and modify** User Security.



12.2 OPTIONS

The following is a brief description of the Utility Menu Options.

ADJUSTMENT CODES - Create and Update Adjustment Code Definitions that are used when **Posting Adjustments** to Patient Ledgers.

CHARGE CARD COMPANIES - Create and Update Charge Card Company Code Definitions that are used when **Posting** Charge Card Payments.

COMMENT CODES - Create and Update Comment Code Definitions that are used on the Patient Insurance Detail Information Screen for **submitting** Comments to Carriers with Claims.

COMPANY NAME – Enter and update Company and Doctor Information/Credentials.

DIAGNOSIS CODES - Create and Update Diagnosis Code Definitions used on the Patient Insurance Detail or Ledger Screen for **submitting** Diagnoses to Carriers for Claims.

EMPLOYERS - Create and Update the Employers file for commonly used Employers for Patient Insurance Screens.

FEE SCHEDULES - Create and Update your Primary Fee (Base) and Other Fee Schedules. ADA CODES, Descriptions, Dollar Values, Etc.

FEES INSUR ESTIMATES - Create and Update Insurance Fee Schedules used to Estimate Insurance Payments when Posting Charges.

HOSPITAL ADDRESSES – Create and revise the List of Hospitals you use.

INSURANCE CARRIERS - Create and Update Insurance Carrier Name, Address, and Telephone Information.

MODEM SETUP - Define Modem Setting so PowerSoftMD can **dial** Phone Numbers.

NEW PATIENT DEFAULTS - Data **automatically filled in** when Adding New Patients.

REFERRING DOCTORS - Create and Update Referring Doctor and/or Agency Info.

ZIP CODES - Create and Update commonly used Zip Codes with the associated City and State Names. Used with the Add New Patient Screen Zip Code, Pull-Down Option.

DELETE PATIENT - Used to **delete existing** Patients by Account Number. The Patients' Balance **must be Zero**, and they **must not be** in any Family.

DEFINE USER OPTIONS - Set User Options for Sound, Etc.

CLEAR INS PENDING FLAGS - Use this to **Clear** the General Screen, Insurance Pending Flag on all Patients with a **Zero or Credit Balance**.

REBUILD FAMILY TREE – **Rebuilds** the Internal Family Tree on all Patients. If you find someone's Family doesn't seem what their General Screen **indicates**, you may **Run this Option** to Automatically Check and Correct all Patient Records.

12.3 ADVANCED UTILITY MENU

The current User **must have** a Security Level high enough **to access** this Menu. Be careful **not to** give **Access** to **All Employees**. The following is a brief description of the **Advanced** Utility Menu Options.

EXPAND LEDGER FILE - Allows you to **expand** the Patient Ledger File when it becomes full. **You should contact Data Tec, Inc for assistance when using this Option!** There is also an **Option to Rebuild** the Ledger File Free Chain.

PATH CONTROL - This should only be **modified** by a Qualified Computer Technician! **Consult** Data Tec Inc. when **using** this Option!

INIT PATIENT FILES - Used to **set up** initial Empty Patient Files. **Contact Data Tec, Inc before trying to use this option!**

DEFINE USER SECURITY - **Create and Update** User ID, Passwords, and the associated Security Access.

CHANGE FINANCE CHG FLAGS - **Turn On or Off** all **Finance Charge Flags** on Patient Records. This **does not** Charge them, just sets them up to be **considered** for Finance Charges, if you **decide to run** the Finance Charge Option from the Forms Menu.

REBUILD PATIENT INDEX FILES - **Use only under Data Tec, Inc supervision!** In some cases, it will correct Alphabetic Access Problems with Patient Names.

LEDGER REBUILD - **Use only under Data Tec, Inc supervision!** Can **reconstruct** a damaged Ledger Transaction File for a single Patient.

GLOBAL USER FLAG CHANGE – Makes a Global Change to **access all** Patient General Screens, and changes the **existing** User Flag Value to a new Value.

WORK STATION UPDATE - **Updates** a Workstation Computer to be **in-sync** with the Main Computer.

EXPAND PATIENT FILE - **Add** more Empty Patient Account Records. **Use only under supervision by Data Tec, Inc!**

DEFINE NETWORK DRIVE - Used only by Data Tec, Inc.!!!

REBUILD TRANS LEDGERS - Used only under supervision by Data Tec, Inc.! This **runs** several hours and attempts to **rebuild** an entire corrupted Transaction Ledger File.

Other Options are **added** from time to time, generally you want to **consult with Data Tec before using** the Advanced Utility Menu Options!

13.1 SECURITY

Security is handled by **identifying** each **PowerSoftMD Computer User** with a **User ID** and a **Password**. With each **ID** you **assign** specific Access Options. Each **User** can change their **Individual Password** at the initial Log-On Screen.

User ID Definitions

007	HALG	HALG	HAL
User Number	User Identification	Sign On Password	Name of User
DOE	HAL	J MD	01
Last Name	First Name	In Suffix	Doctor/Provider Number

Security Options

Access Utility Menu Access Financial Reports
 Advanced Utility Access Modify Ledger items, except Balance
 Access User ID Definitions Delete or Merge Patient Records
 Access Schedule Utility Menu Without Special Password Delete Ledger Items Posted by any UserID
 Force Patient Balance Changes

Advanced Options

Access Management Audit Reports EMR Electronic Medical Records Access
 Prescription Access EMR Access ONLY
 Prescription VOID Correction Access eScripts - Write New Scripts
 Access To Do List Stop Posting Screen Access

Buttons

Save (red) New User (green) User List (yellow) Delete User (gray) Cancel (gray) Save Exit (blue)

1. From the Primary Menu, **select** the Utility Menu; then **select** the Advanced Utility Menu.
2. Next, **choose** the Define User Security to **create** and **update** User Security definitions.
3. Use the **New User Button** to **set up** a New Person. Their Name and Password must be a **minimum of four characters** and a **maximum of ten**.
4. Fill in the desired **levels** of Security.
5. **Click the Save Button**, then **Cancel** or **Exit**.
6. Options take affect the **next time** the User **Logs-In** again.

13.2 SECURITY OPTIONS

ADVANCED UTILITY ACCESS - Gives the User **access** to the Advanced Utility Menu.

ACCESS USER ID DEFINITIONS - Allows the User to **update** the User Security Definitions.

FORCE BALANCE CHANGES - Allows the User to **Force** Balance Changes on Patient Ledger Screens. ***This is only a Recovery Option, never leave it set for Anyone, except if directed by Data Tec Staff.....***

ACCESS FINANCIAL REPORTS - Grants **Access** to Monthly Financial Reports.

MODIFY LEDGER ITEMS OTHER THAN BALANCE - Lets the User **change** items on the Patient Ledger after **Postings** are done.

DELETE PATIENT RECORDS - Grants **Access** to the Delete Patient Option on the Utility Menu.

ACCESS MANAGEMENT AUDIT REPORTS - Grants **Access** to Reports Menu Management Reports, ***only Senior Management should have this Access !***

PRESCRIPTION ACCESS - Lets User **Enter** and **Print** Prescriptions.

PRESCRIPTION VOID CORRECTION ACCESS – Allows User to make **Corrections** to Prescriptions that have already been **entered**.

ACCESS TO DO LIST – **Future** Enhancement.

EMR ELECTRONIC MEDICAL RECORDS ACCESS – Allows **Access** to EMR Folders for Patients. ***Only Physicians, Nurses, and Medical Assistants should have this Access!***

EMR ACCESS ONLY – Allows **Access** to EMR Folders, **but not** Financial Billing Screens. ***Typical setting for Nurses!***

14.1 BILLING

Statements can be **Printed** from the Forms Menu. You can also **Print a Receipt** formatted like a Statement from a Patient Screen by **selecting** the Receipt Option from the Change Screens Secondary Menu. On occasion, you may wish to **Print** out a Ledger Listing for a Patient. **Print** this from the **Print Button** on the Ledger Display Screen.

14.2 SINGLE STATEMENTS

Select any Patient, and then **select** the **Print Option** at the top Menu and **click** on Bill then **select** the **format** you want. See which **type** of Bill you prefer, if Posting detailed Payment Information, the **Charge Level Bill** is usually the best.

14.3 PRINTING STATEMENT BATCHES

1. **Select** the Forms Menu.
2. **Select** the Billing Statement.
3. **Select** the Bill Format you want to use
4. **Fill in the Options** you want on the Parameter Screen. Then **select** Run.
5. Next, PowerSoftMD will **Scan** your Patient Files and **determine** the Number of Statements it would **Print** and ask you if you want to **actually** do the Printing.

The first couple of times you **Print** Monthly Statements, **consult with Data Tec to get help customizing your Statement Format!**

Note: A fantastic **Option** is available to **send all** your Statements **Electronically** for only 54 cents per Statement! This includes Postage, the Statement, Envelope, Return Envelope, and all Labor costs.

15.1 FINANCE CHARGES

Before a Patient can have a Finance Charge **Posted**:

1. The **Fin. Chg. Flag** on the Patient's General Information Screen must be **filled** with an "X". You may **select** to have this done **automatically**: use the Utility Menu, **Option S, Flag Change**.
2. The **No Bill Flag** on the Patient's General Information Screen must be **Blank**.
3. The Patient and/or Family should **owe** you money.
4. **Define** a Procedure Code with the **description** for the Type of **Finance Charge** you want to use. Use a **Code** that is **not listed** - for example: **CHG Code 998888**. To **update** the Procedure Code List, **use** the Utility Menu, **Fee Schedule Option**.

15.2 TO POST FINANCE CHARGES

1. Be sure to **run** a **Backup before running** the Finance Charge Option!
2. From the Forms Menu, **select** the Monthly Finance Charges Option.
3. You may **select** from several Options, and you may **apply either** a Finance Charge based on a **Percentage Calculation** or on a **Fixed Billing Fee**.
4. After you **run** the Procedure, you may wish to **run a Daily Audit Report** to see the results of the **Finance Charge Postings**.

16.1 CORRECTIONS AND ADJUSTMENTS

No matter how careful you are, sooner or later someone will **Post** an Entry **incorrectly**. The Corrections Option lets you **correct** Errors, create a complete **Audit Trail** to help maintain the integrity of your Data, and **Flag** the Computer to **Not Print Errors** and **Reversing Entries** on Insurance Forms and Statements.

16.2 CORRECTING ERRORS

If you notice a **mistake in Posting**, after the fact, you will need to decide which **Type of Correction** to make. There are three major goals in making the Correction(s):

- A. **Correct** the Patient's **Ledger** for Billing and Insurance.
- B. Keep the Daily and Monthly Payments in **balance** with the Bank **Deposit**.
- C. Keep the Total Charges **correct** for **Production Analysis**.

16.3 CORRECTIONS

You may **change** several items of Information **directly** from the Ledger Display. **Click** on the Item you want to **change** - if you are **allowed** to change it, you will be Prompted for the New Value. It's easy!

If you need to **change** something that you're **not allowed** to change, you may Delete the Entire Transaction by **clicking** on the Posting Date Field. You are **allowed to do this only on the same day that the item is Posted!**

To **correct** an Item **Posted** on a **Prior Date** do the following: **Post** an **Adjustment** to **correct** the Balance the way it should be, **without** the Error Entries. Next, **Post** the Entries **correctly**. Finally, on the Ledger Screen, **click** on the **H Column** on the Original Items Posted **incorrectly**, and the **Adjustment** there will be a **Red Letter "H"** in these **Columns**. The "**H**" means the Entry is **Hidden** and **will not be shown** to Patients on their Documents or Reports. It will also be **ignored** for Statistics and Insurance.

Let's consider some cases of Errors that might be caught several days after they were Posted Incorrectly:

Case 1 You **Posted** a Payment as being **too Large**. For example, you **received** a Check for \$1.20 and **Posted** it for \$125.00

1. **Post a Negative** Payment of -125. This is a **Reversing Entry**.
2. **Post the correct** Payment of 120.
3. Use Corrections Options to **hide** the Original Transaction and the Reversing Entry of Step 1.

Case 2 You **Posted** a Payment as being **too Small**. For example, you **received** a Check for \$125. and **Posted** it for \$1.20.

1. **Post a Negative** Payment of -120. This is a **Reversing Entry**.
2. **Post the correct** Payment of 125.
3. Use the **Corrections Options**, to **hide** the original Transaction and the **Reversing Entry** of Step 1.

Case 3 You **Posted** a Payment or a Charge to the **wrong** Account.

1. **Post an Identical Transaction** to that **wrong** Account, except make it a **Negative Value**. This is a **Reversing Entry**.
2. **Post to the correct** Patient Account.
3. Use the **Corrections Options** to **Hide** the Error and the **Reversing Entry** of Step 1.

Case 4 You **Posted** an **Incorrect** Charge to an Account.

1. **Post an identical Transaction** to the Account, except use a **Negative Value**. This is a **Reversing Entry**.
2. **Post the Transaction correctly**.
3. Use the **Corrections Option** to **Hide** the Error and the **Reversing Entry** of Step 1.

Case 5 You **Posted** an **Incorrect** Modifier or **Number** of Units.
Use the Ledger Screen to **correct** the account.

Case 6 You **Posted** using the **wrong** Doctor or Provider Number.
Use the Ledger Screen to **correct** the account.

16.4 MAKING ADJUSTMENTS (NOT ERROR CORRECTIONS)

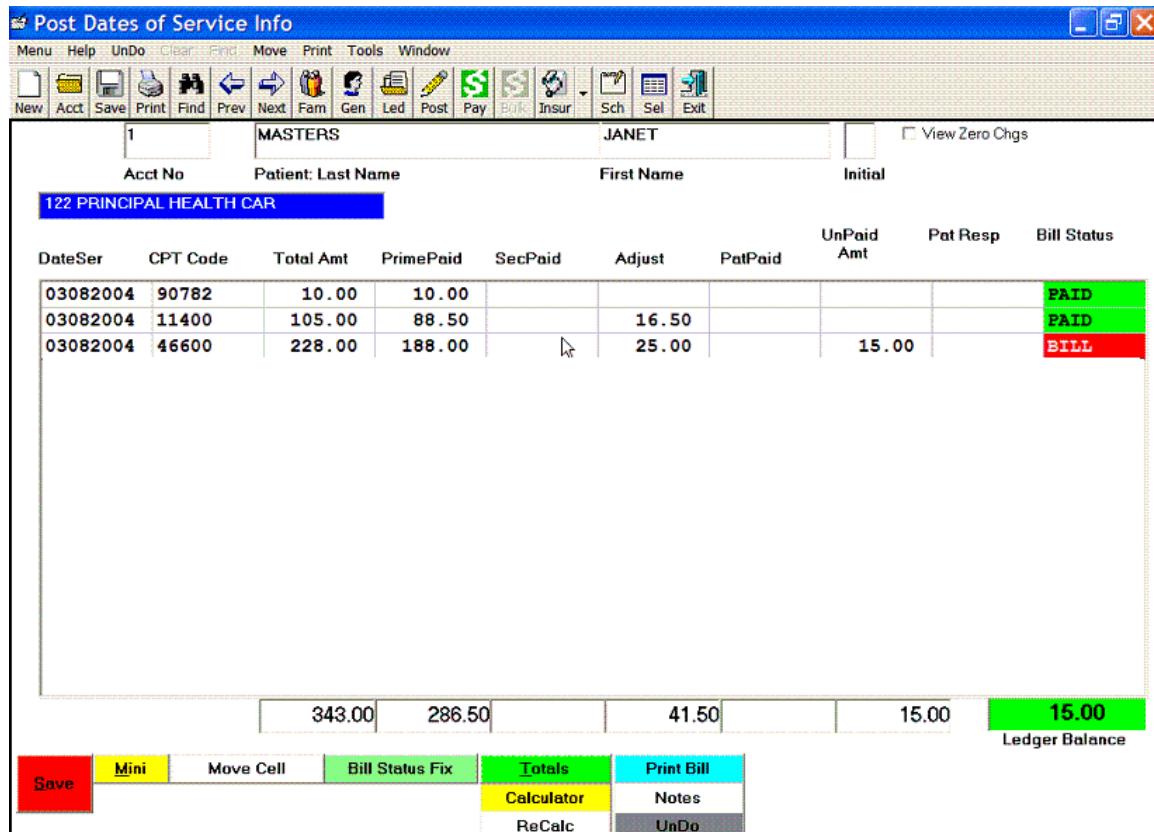
Adjustments are used to **change** the Patient's Balance and **Record the Reason for the Change**. There are **999 Adjustment Types** that can be used, **Numbers 001 through 999**. You **define** what you want these Numbers to **represent**. A Normal Adjustment **reduces** the Patient's Balance; a Negative Adjustment **increases** the Patient's Balance.

Adjustments should be **used** for Discounts, Write-Offs, and Surcharges. If you plan to use **Special Reports** for Capitalization Plans, **Adjustments** would be **Posted to offset** Payments made to your Office by Cap Plans. Refer to **Chapter 18.9** for more information about this specific use of **Adjustments**. **Adjustments** can be used for **correcting** Posting Errors, but then they are generally **Hidden** (“**H**”). You can use the **ADJ Code Button** on the **Posting Screen** to easily look up **Adjustment Codes**.

16.5 RE-DISTRIBUTION OF PAYMENTS INFORMATION

When you make **Corrections** to the Ledger you must be sure that the **Correction** is reflected in any **Payment Distribution Information** on other **Ledger Items**.

We recommend using the “**DOS**” Screen available from the Patients’ **Ledger**, or **Posting Screens**, just use the blue “**DOS**” Button.



DateSer	CPT Code	Total Amt	PrimePaid	SecPaid	Adjust	PatPaid	UnPaid Amt	Pat Resp	Bill Status
03082004	90782	10.00	10.00						PAID
03082004	11400	105.00	88.50		16.50				PAID
03082004	46600	228.00	188.00		25.00		15.00		BILL

This Screen allows you to **click** on a Cell and **move** or **change** the Dollar Amounts without **Posting**. For example if you **Posted a Wrong Amount** for an **Insurance Payment** and **Corrected the Ledger** by using **Adjustments** and **Re-Posting**, the **Insurance Amount** applied to Charges might be **wrong**, you could **Correct the Applied or Distributed Amounts** on this **Screen**, after your **Corrective Postings**.

Try the “**Totals**” Button on the bottom of the Screen, it will show you **Amounts** that have been **Posted** to the Ledger vs the **Amounts** that have been **Applied to Charges**.

You can also use this Screen to **correct** the “**Bill Status**” Column by **using** the “**Bill Status Fix**” Button.

16.5 RE-DISTRIBUTION OF PAYMENTS INFORMATION

When you make corrections to the ledger you must be sure that the correction is reflected in any payment distribution information on other ledger items.

We recommend using the “DOS” screen available from the patients’ ledger, or Posting Screens, just use the light blue “DOS” button.

The screenshot shows a software application window titled "Post Dates of Service Info". The menu bar includes "File", "Help", "Undo", "Clear", "Find", "Move", "Print", "Tools", and "Window". The toolbar contains icons for "New", "Acct", "Save", "Print", "Find", "Prev", "Next", "Fam", "Gen", "Led", "Post", "Pay", "Bank", "Insur", "Sch", "Sel", and "Exit". The main window displays a ledger for patient 122 PRINCIPAL HEALTH CAR. The header information is: Acct No (1), Patient: Last Name (MASTERS), First Name (JANET), and Initial (). A checkbox for "View Zero Chgs" is present. The ledger table has columns: DateSer, CPT Code, Total Amt, PrimePaid, SecPaid, Adjust, PatPaid, UnPaid Amt, Pat Resp, and Bill Status. The data is as follows:

DateSer	CPT Code	Total Amt	PrimePaid	SecPaid	Adjust	PatPaid	UnPaid Amt	Pat Resp	Bill Status
03082004	90782	10.00	10.00						PAID
03082004	11400	105.00	88.50			16.50			PAID
03082004	46600	228.00	188.00		25.00		15.00		BILL

At the bottom, there are buttons for "Save", "Mini", "Move Cell", "Bill Status Fix", "Totals", "Print Bill", "Calculator", "Notes", "ReCalc", and "UnDo". The "Totals" button is highlighted in green. The "Bill Status" column for the last row is labeled "BILL". The "Ledger Balance" is shown as 15.00.

This screen allows you to click on a cell and move or change the dollar amounts without posting. For example, if you posted a wrong amount for an Insurance payment and corrected the ledger by using adjustments and re-posting, the Insurance amount applied to

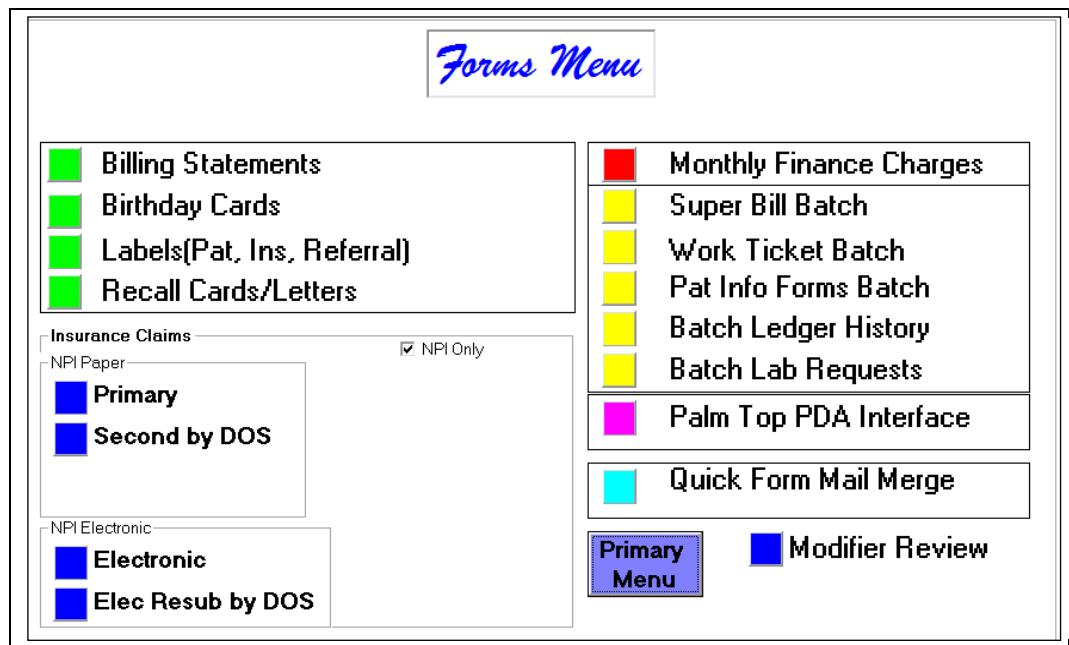
Charges might be wrong, you could correct the applied or distributed amounts on this screen, after your corrective postings.

Try the “Totals” button on the bottom of the screen, it will show you amounts that have been posted to the ledger vs the amounts that have been applied to charges.

You can also use this screen to correct the “Bill Status” column by using the “Bill Status Fix” button.

17.1 FORMS

The **Forms Menu** is used to **Print** and/or **Process**:



You may also **Print** Patient Letters using **Quick Forms** from the **Primary Menu** or from the **Patients General Information Screen**.

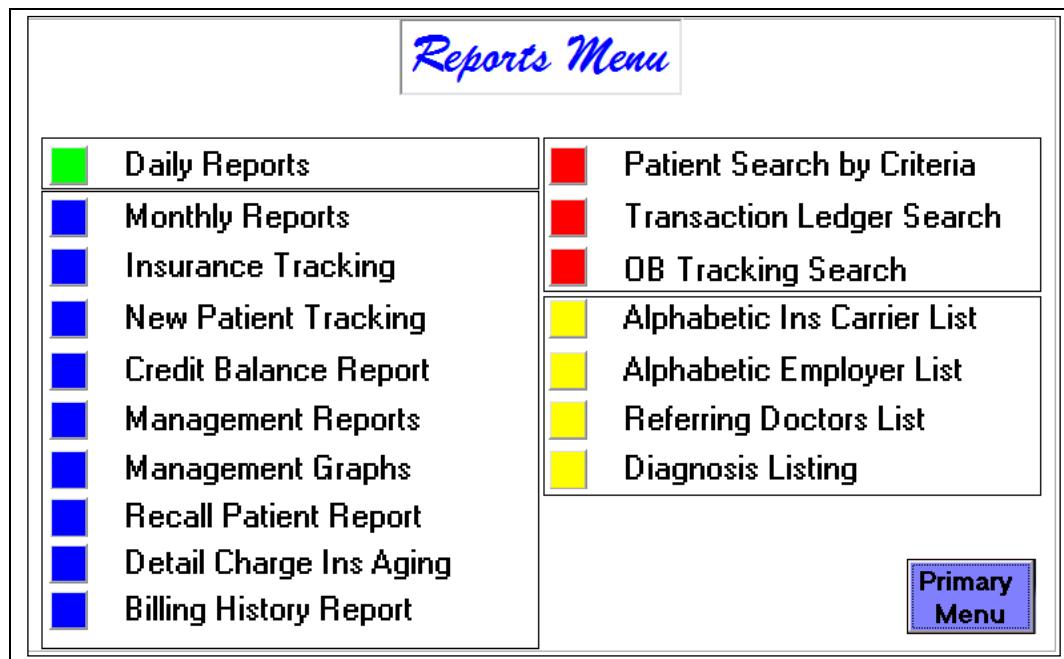
All Forms are designed to be **Printed** on HP Laser Printers. Sometimes Ink Jet Printers will work.

Generally, **Alternate Formats for Forms** can be set up. The **Control Files** are accessed directly from the **Option** you are using by **clicking** the **Edit Button**.

18.1 REPORTS

Reports are designed to be **Printed** on 8 1/2 by 11-inch Plain Paper. HP Laser Printers are recommended; Ink Jet Printers might work for you; Dot Matrix Printers are **not recommended**.

Reports are grouped together on the **Report Menu**. When you **select** the **Run Option**, the **Report(s)** are generated. Next, you can **view** them on the Screen and **scroll** forward and backwards through them. Then you can **Print** them or **Print just Specific Pages**.



By grouping the **Reports** together, you can run a **Group of Reports** by pressing one **Button**. For example, at the end of the day select the Report Menu, Daily Reports Option and **click Run**; that's it.

Most **Reports** allow you to **run** the Report for the **entire Office** or for just a **specific Doctor and/or Provider**. We strongly recommend you **run** at least **one Copy** of the **selected Report** for the **entire Office**. This can help you catch **mistakes!** Let's say you **Post Information** for Doctor 11 instead of Doctor 01. If you didn't run the **Report** for all Doctors, you might miss this mistake!

You can run **Reports** for past days as well as the current day. An **exception** to this is that the **Aging Report** ages the Balances based only on the current date.

18.2 REPORTS AVAILABLE

DAILY REPORTS - Select and run these Reports at the End of each Business Day.

MONTHLY REPORTS - Select and run these Reports at the End of each Business Month.

INSURANCE TRACKING - Run these Reports on demand, usually once or twice a Month.

CREDIT BALANCE - Run this Report for a List of all Patients with Credit Balances and their addresses, for Insurance Overpayment Refunds.

MANAGEMENT REPORTS – Run these Reports typically on a Monthly basis to get another handle on who your Problem Accounts are, etc.

MANAGEMENT GRAPHS - Run to see Overviews of Vital Statistics for an Entire Year at a glance. You could review this each Month, compare this to previous Months to see if anything strange is happening to your Money.....

PATIENT SEARCH – Search for Patients that meet Specific Criteria.

TRANSACTION SEARCH – Search by Procedures and/or Adjustment Codes for Patients during any period of dates.

OB TRACKING – Keep on top of Current Active Patients that are Pregnant.

LIST REPORTS – You can pop up a Search Window and find Carriers, Employers, And Diagnosis Codes on Patient Screens. But, you may also Print off a List on Paper for your review. Some Lists like Fee Schedules are Printed right from the Utility Update Screen for the List. When in the Update Screen check the bottom of the Screen for a “Print” Button.

TRANSACTION SEARCH - Lets you **Scan** all Patient Ledgers during any period of time looking for **Specific Charge Codes (ADA Procedures) and/or Adjustments.**

CREDIT BALANCES - Reports Patients with **Credit Balances.**

ALPHA INSURANCE LIST - Alphabetic Listing of **Insurance Carriers.**

ALPHA EMPLOYER LIST - Alphabetic Listing of **Employers.**

19.1 **LABELS**

From the **Forms Menu** you may **select** the **Labels Option**.

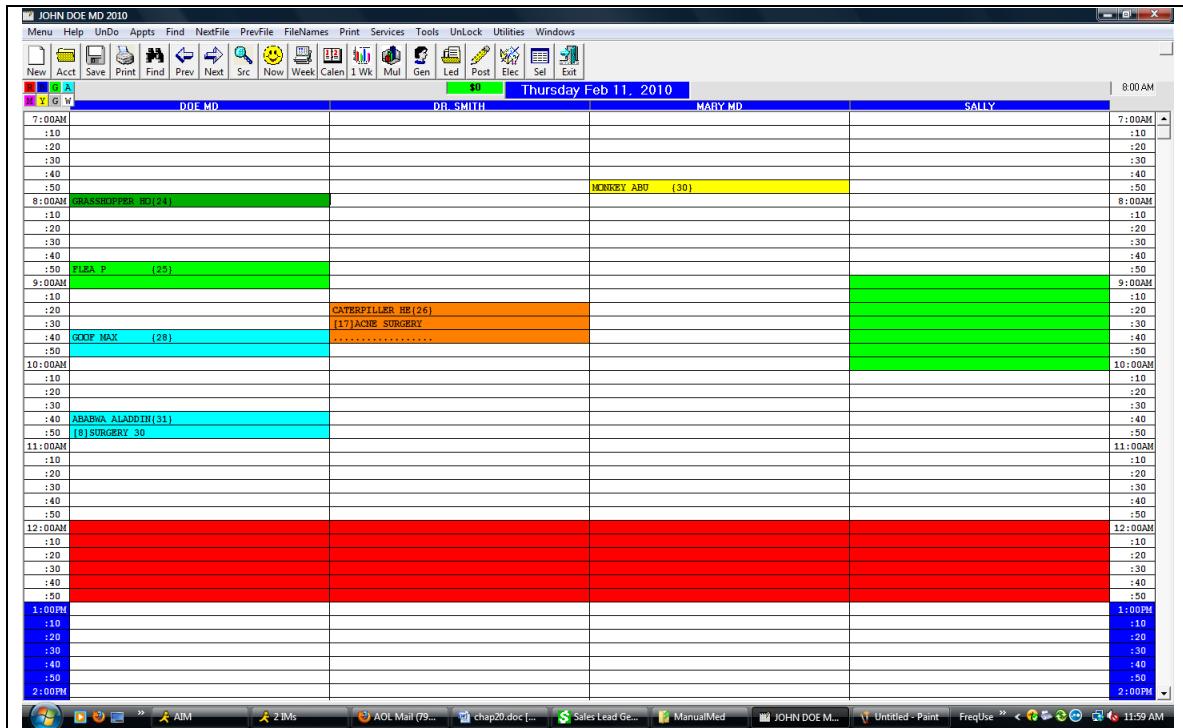
Labels are designed to **Print** on 8 1/2 by 11 inch paper. They are designed for HP Laser Printers but may work on your Ink Jet Printer as well. Each sheet of paper contains 30 Labels. There are 3 Labels across and 10 Labels down the page.

You may **Print Labels** for Insurance Carriers, Referring Doctors, and Patients.

Each **type** of Label has different **Options** so that you may **select** Specific Criteria to **Print** the Labels of your choice. Just follow the **On-Screen Prompts**.

Dymo Label Printers can also be used to quickly **Print** Patient, Insurance, or even Specimen Labels, directly from Patient Screens. Just click from the Top Toolbar “**Print**”, then **select** the **Label Option**.

20.1 EASY SCHEDULE



EasySchedule is a Daybook built right into PowerSoftMD. To start **EasySchedule**:



1) From the Primary Menu, click the **Sched** Button.



2) From the Patient General Screen, click the **Sch** Button.

The Daybook can be **formatted** in either 10- or 15-minute increments, from 7:00 AM until 10:00 PM each day. You can **Schedule** as many years ahead as you want. Each **Schedule** has **four Columns**, and you can have up to **99 separate Schedules** (with four Columns each).

This gives you great flexibility when setting up your **Electronic Schedules**. You can have a Doctor and a Nurse on the same **Schedule** or **separate ones**. You can have each Doctor on their own **Schedule**, or all together. You can even use each **Column** for a **Specific Room**.

20.2 SETUP

From the Schedule Display, **click** the Utility Menu Bar then **select** “Utility Options Menu.” The **password** is “SECRET.” This lets you **set up** your Schedules and **customize** them for your Practice.

20.3 UTILITIES

Service Code Definitions - Here you **define** which Typical Services you **provide**, and **assign** Time Units, Color, and the Fill Character to **each** Service.

Schedule Names & Path - Lets you **specify** the Column Names for **each** day of the week for **each** Schedule.

Time Slot Definitions - Specify if you are on 10-minute or 15-minute **Time Units**, and the first hour of the day you wish to have **Displayed**.

Initialize New Year - You need to **build** an **Empty Schedule** for each New Year (for as many **Schedules** as you use).

Set Scheduling Options - Specify Options for your Office, like automatic **Prompting** for a Service after you **Schedule** someone. Also, whether you want the Scheduler to **automatically Save** after 5- or 30-minutes; **NOTE: We recommend 5**.

20.3 SWITCHING DAYS

There are several ways to **move** to a **different Date** on the Schedule:

- A. Click the **Next Button** to go to the **next** day (or use **F8 Key**).
- B. Click the **Prev Button** to go to the **previous** day (or use **F7 Key**).
- C. Click the **Week Button** to go ahead one week (exactly **7 days**).
- D. Click the **Today Button** to instantly go to **Today's Date**.
- E. Click the **Calendar Button** to **Display** a Calendar where you can **click** Buttons to **move** Days or Months and then **click** on the **desired Day**.
- F. Click the **1 Wk Button** to look at the **entire week** for all **Columns**, at a glance.



20.5 VIEWING THE DAY

When on the day you want, **move up** and **down** through the day using the **Scroll Bar** on the **right-hand side** of the Screen. You can **jump up** and **down** quickly by **clicking** just **above** or **below** the **Scroll Bar Arrows**, while **clicking** right on the Arrows moves you slowly. You can also **jump directly** to a **specific** Hour by **Clicking** on the **Time** in the **far left-hand Column** or the **right-hand Column**.

To see an **Entire Week** at a time, use the **1 Wk Button**. This lets you see a Week at-a-glance, and to **scroll forward** or **backward**, and then **Click** on the desired Day. The Time Slots will show with the **appropriate Color** filled in, that you've **assigned** to the Procedure or as White if it is totally Empty.

20.6 MAKING AN APPOINTMENT

Locate the Empty Time Slot you wish to **Appoint** Someone to. **Click** on the Time Slot, then **Type** in their Name (Last Name, Space, First Name). The more of the Name you **Type** in, the better the Match!

Now, **click** on the **“Appts” Drop-Down Menu** at the Top of the Screen and **Select** **“Appointment by Name Search”** or the **Button** which will Display the Search Screen. **Click the Search Button**. This will show you a **List** of Potential Names. You can also use **Ctrl-S Keys** instead of the **Menu Bar**.

You may use the **Scroll Bar** or your **Keyboard Arrow Keys** to **Scroll Down** to **Find** the Desired Person. As you **Scroll**, Information about the Patient will be **Automatically Displayed**.

When you have the Name, you want **Highlighted**, **Click the Select Name Button**.

If you have your **Options** Set to **Prompt** you for a Service, then the **Services Window** will Display, and you may **Select** the **“Reason for the Appointment”**.

If you know a Patients **Account Number** you can just **Type** the Number into the Time Slot then **Select** the **“Appointment by Number”** from the **“Appts” Drop-**



Down Menu or **press** the **Button**.

20.7 NEW PATIENTS

To **add** New Patients from the Schedule, you can **type Ctrl+N** or **Select** “New Patient Real” from the “**Appts**” **Drop-Down Menu**.

This brings up a Screen that allows you to **Enter** Basic Account Information and quickly **Create** a New Patient Account Record. After Adding the Record, you can **Click** on an Empty Time Slot (the Account Number just Added will be filled in for you). Next, just **Press** the **Ctrl+A Keys** to **Add** the Appointment by Account Number.

Please Note: The Patient’s First Visit Date will be **Recorded** as 01/01/2999. Therefore, you can **run** a Report at any time to **find** Patients that were **Added** and **never actually** came in. You can always decide to **Delete** their real Record and **Reuse** the Account Space for **future** Accounts. This method is the simplest and easiest method for Staff to understand and use.

20.8 BLOCKING OFF TIME

You can **Block Off Time** several ways:

- A. Use Automatic Character Fill:** Just **type** one Character at the beginning of a Time Slot, then when you **Scroll** to another day, the entire **Time Slot** will be **filled in** with that Character. If there are any words in the Slot they will be left alone.
- B. Use the Color Buttons.** **Click** on the **Time Slot** in question, then **click** on the **Color Button:** **R=Red**, **B=Blue**, **G=Green**, **Y=Yellow**, **M=Magenta**, Etc.
- C. Use the Services Button** at the Top of the Screen to **fill** Several Time Slots at once with a Predefined Service, such as Lunch Breaks, Time Off, Etc.

20.9 SAVE CHANGES

Changes to the Schedule are **Automatically Saved** when you **Change Screens** or **Press** the “**Save**” **Button**. If you make a **Change** and don’t want to **Save It**, use the “**UnDo**” **Button** at the Top of the Screen. If you make a **Change** and don’t **Save** within the Specified Time, the System will **Automatically Save It** for you and **Exit** the Schedule. Normally, the **Specified Automatic-Save-Time** is set to **5 Minutes**, but you can **Change it** in Utilities.

20.10 BROWSE MODE

If you are trying to **View** a Day that someone else is **Viewing** on **another Computer**, you will be placed in the “**Browse**” **Mode**. This prevents both of you from **Accidentally Scheduling** the same time for different People! You can also get into “**Browse**” **Mode** if you have **Easy Schedule** Open Multiple times on your own Work Station.

If a Work Station gets **turned off** or **knocked out** of the Schedule abnormally, the Calendar Day of this Event can get **Locked Out** if no one else is **Viewing** it. If this happens, make sure no one is actually **using** the day, then **press** the **“Unlock” Button** on the upper right of your Schedule Screen, and reply **YES**.

20.11 MOVING AN APPOINTMENT

You can easily **Move** any Group of **Time Slots** on the Schedule. To do so:

1. **Click and hold** the mouse on the First Time Slot to **move**, keep the mouse held down and **drag it** over all the Time Slots to **move**.
2. Select the “**Appts**” **drop-down Menu** and **Select** “Move Appointment” or **Press the Ctrl+M Keys**.
3. **Click** on the Empty Slot where you want to **place** the Information.
4. Select the “**Appts**” **drop-down Menu** and **Select** “Move Appointment” again or **press the Ctrl+M Keys** again.

20.12 CANCELING, DELETING, OR REMOVING AN APPOINTMENT

Click on the Appointment you wish to **Delete**, and **Click** the “**Appts**” **Drop-Down Menu**, then “**Cancel Appointment**” or use the **Ctrl+C Keys**. You will be given a **Choice of Reasons** for the **Cancellation** of the Appointment. This **Creates a Log of Canceled Appointments** that you can Print.

PLEASE NOTE: If you just want to **Remove** an Appointment *but* leave **No Mark** on the Patient’s Record, **click** on the “**Remove Appt Human Error**” Option from the “**Appts**” **Drop-Down Menu**.

20.13 SEARCHING THE SCHEDULE

Use the “**Find**” **Button** at the Top of the Screen to quickly **Search** through the Schedule for *any* Specific Information. The **Search** is an *Exact Match*; it is **Case-Sensitive** and if you **don’t** Find your Information, you may be **Looking** for a String of Characters that are **too long**. For example, to Search for “Clause Santa Junior,” you might want to **Look** for just “Santa” or just “Clause.”

Currently, the “**Find**” **Button** Searches only the Year that you are in, on the

Calendar. You will need to **Advance** to the Next Year to **Search** it, **before using** the **Find Button**.

20.14 REPORTS

Use the “**Print**” Drop-Down Menu to **Select** the Reports you wish to **Print**.

NOTE: We recommend you **Print (to Paper)** the Schedule for the Week Ahead on the Last Day of your Current Work Week. **This gives you a Paper Copy to refer to if Something happens to your Computer over the weekend!**

20.15 REMINDERS

From the “**Tools**” Drop-Down Menu, **select “Reminders”** to **Specify** Reminders for Specific Days. You must be on the Day you want to **Set the Reminders** for and **Save** them. When the Day is Displayed, a **Yellow Reminder Note** will **appear** in the upper right-hand corner of the Screen.

20.16 EZLIST

An incredibly useful **feature** is the **EzList Button**. From the “**Tools**” Drop-Down Menu, **Select “EzList Note Pad”**. This allows you to quickly **create Lists** of Information, **Update them**, and even **Print** them for the entire Office to share. Most Offices use “**List 1**” for Patients **waiting** for Appointments. This Feature is also **available** from your Primary Menu.

20.17 RECOVERY

Easy Schedule is programmed to provide the maximum Security possible for the integrity of Schedule Information. This is accomplished by:

- **Automatically Saving Changes** when you Change Screens
- Having the **Automatic Timer Save Changes** for you (usually every **5 Minutes**)
- Creating and Maintaining an **Audit Log** of the last **12,000 Schedule Changes** made. You can **Run** these Reports from the “**Print**” Drop-Down Menu.
- If you use the “**Find**” **Button (the Binoculars Icon)** to **Schedule** your Patients, the Patient’s Record and Appointments Screens are also **Updated** and can be Viewed Independently of the Schedule.

20.18 MODEL DAY SETUP

1. Pick the Earliest-Possible, Empty Day of the Week you want to **Set Up**. For example, the Earliest, Empty Day might be the 1st Monday in February. Make sure the Day is **Empty**.
2. **Color Code and/or Use Characters to Set Up** your Model Day. Remember **Colors are Visual Queues**, Characters like “/” or “*”, will actually **cause** the Hour to **Print**.
3. Once the Day of the Week is **Set Up** the Way you want, click the “**Utilities**” **Drop-Down Menu**, then **Select “Fill From Model Days”** and **Select the “Save Default Weekday” Button**.
4. Next, **go to** the most current Monday (in our example) **Click the “Utilities” Drop-Down Menu**, then **Select “Fill From Model Days”** and **Select the “Fill For Year”** to **Fill** in every Monday for the **Rest of the Year** with your Model Monday. **Please Note:** If there is Information **Already in any Slot**, the Information will be **left alone**.
5. **Repeat** this Process for the **Rest of the Days** of your Work Week.

WARNING - You are still **Responsible** for your Information and we **recommend** Regular Daily and Monthly Backups that are **kept** and **not Reused** for a Reasonable Amount of Time. **Data Tec is not Responsible** for your **Data and/or any Backup Procedures you Implement or ignore to Implement**.

Don't forget to listen to the PowerSoftMD Scheduling Audio-Visual Training CD to learn how to operate EasySchedule; it's a free Resource!

21.1 RECEIPTS

Walk-a-Way Receipts provide the Patient with a Complete Synopsis of Charges and Payments to Date (including an Aged Balance and Date and Time of Next Appointment) for their **Record** or for **Insurance Payment Submission**. Receipts **Print** on Standard 8 1/2 by 11 Computer Paper.

After **Posting** the Patient **Charges**, **click the Receipt Button** or on any Patient Screen, **select Print** at the Top Menu and **Click Receipt**. Make sure that you have the Patient Screen Displayed for Whom you wish to **Print** a Receipt.

You may Optionally **fill in a Next Appointment Date** instead of the **Recall Date**. Fill in any **desired Information** and **Click the Print Button**.

You can **Print a Receipt** for any Patient at any Time. You can **Print a Receipt** for any Past Day; just **change the Receipt Date Field**.

Receipts can be **Set Up** to include **CHG Codes, Descriptions**, and other **Information** Required for **Submission** of the Receipt to the **Insurance Company** as **Proof of Claim**.

You can **Select** Different **Receipt Form Numbers** for Different Formats:

- A. Has Master Card, Visa, and Discover**
- B. Has Master Card and Visa**
- C. Has No Charge Card Companies**

You can use the **Edit Buttons** to **Customize** the **Receipt Format(s)** for your Practice.

22.1 QUICK FORMS

QuickForms is a fast way to **Edit, Print and Copy Forms and Letters**. For your convenience, some Sample, Single-Page **Letters** are included.

22.2 GETTING STARTED

Select the Quick Forms Option from the **Primary Menu** or from a **Patient Screen**. You will see a **List of Quick Forms** already loaded into your System; you can use these **As-Is**, or **Edit** them. You can even **add** your Own **Forms**.

You can Scroll through the List of Quick Forms; Click on the Form you want; then **Click on Print**, to **Print the Form**, or **Click Edit** to **Update** it. If you want to **Copy** an **Existing Form** and call it by a **New Name**, first **Click on the Form**, then **Click Edit** and **Edit It** from your **Keyboard**. **Click the Save Button** (which allows you to **Rename It**).

22.3 EDITING FORMS

Type the Document as you would like it to appear on Paper, using the **Same Keys** to move around and to make **Changes** with **Standard Windows Keys**. **Margins are Adjusted** on the **Editing Screen** or at the **Printer**. **QuickForms** are intended to be used for **Simplified Word Processing**.

For **faster Processing of Commonly Used Documents**, the Computer can **Prompt you for Selected Data**. To do this, **Type the Special Symbol & in front of the Word to Describe the Data Item**. For example: **&Name, &Doctor, &Date**. When you **Select to Print**, the Computer will **Prompt you to Type in the Appropriate Data Items and Press the Enter Key**. What you **Type** will be **Inserted into the Document**. Use the **Special Symbol &sysdate** to have the Computer's Date **Inserted** into your **Document**. Use the **Quick Form, Edit Mode, Help Button**.

When you are ready to **Print**, **Select the Desired Form Name** then **Click the Print Button**.

You may **Print a Quick Form** directly from the **Patients General Information Screen**. Use the **Quick Form Button**. When you are **Editing the Quick Form** you may use the **Help Button** to **Display a List of Special Symbols** that can be **Inserted in the Form to Automatically Pick Up Patient Field Information** when the **Form Prints!**

23.1 RECALL

There are **Several Methods** which provide efficient and friendly **Follow-Up** for **Patient Recall**.

Use the **Patient Search Report** to get a **List of Specific Patients** that need a **Recall Visit**.

You can **Print Labels** from the **Forms Menu** from the same type of Criteria.

23.2 RECALL CARDS AND LETTERS

Select the **Forms Menu, Recall Option**. You can **Print your Customized Recall Cards** directly on **Laser Forms**. They can **Print** based on **Next or Last Recall Dates**. They **Print** quickly and easily. You can even have the **Date of their Last Exam Listed on the Card**.

24.1 BACKUP

PowerSoftMD provides **Backup Software**. Use the **Backup Button** on the **Primary Menu**. ***Backup is your responsibility.*** Here are some **Helpful Suggestions:**

- A. The **PowerSoftMD Windows Software** and **Data Files** are stored in the **Folder (Directory) \EZW** which is usually in the **Root Directory** of your **Main Computer**. ***We recommend backing up all files in this Folder.***
- B. It is a good idea to occasionally **Backup** the **\EZW Folder** on your **Secondary Computer** as well. ***This would make it easier to Restore a Broken Work Station.***
- C. In a **Network Environment**, it is quick and easy to **Backup (Copy)** the **Main Computer's \EZW Folder** to a **Secondary Computer**. But, importantly, **use another Folder Name** like **\EZWBK**, for instance. ***HOWEVER, THIS DOES NOT REPLACE A DEDICATED BACKUP DEVICE!***

You can easily **set up** the following **DOS Batch File** on the **Secondary Computer** to do the **Copy**:

NETBACK.BAT (This Batch File on the **Secondary Computer** should have an **Icon** on your Windows Desktop.)

```
CLS
MD  C:\EZWBK
XCOPY  F:\EZW\*.*  C:\EZWBK\*.*\S
EXIT
```

This assumes the **Main Computer** is accessed as **Drive F**.

- D. If you do ***differential*** **Backups** of the **\EZW** **folder**, please do a **Complete** or ***Full*** **Backup** of the **\EZW Folder** **at least Monthly**.
- E. A **Complete Back Up** of your **Main Computer's Hard Drive** is **recommended** on a **Monthly Basis**.
- F. **Rotate**, keeping **Several Different Backup Sets**. Use a different **Tape** and/or **Zip Disk** for each **Day of the Week**; and also **rotate through Multiple Sets** of **Monthly Backups**.

NOTE: Currently, we prefer the **750 Meg or larger Zip Disks** for **Backup**. They appear to be much faster and more reliable than Computer Tapes. Technology always changes and so do the **Backup Devices**.

24.2 BACKUP GOLDEN RULES

- A. Your Computer **will break** - when you least expect it!
- B. You must **Backup on a regular daily basis!**
- C. Keep **Multiple Sets of Backups to rotate through** - **Backup Tapes and Disks also fail!**
- D. Keep at least **one Backup out of the Office on at least a Weekly Basis** in case of fire, theft, etc. **Fire Boxes don't work!**
- E. You need a **Computer Professional** to help you **set up your Backup Procedures** and **Test them** for you.
- F. Remember, **you can never have too many Backups!**

25. 1 Electronic Insurance

The **Electronic Claims Screen Submits Electronic Claims** by building a HCFA 1500 Image Text File to Transmit. We also **Support the UB04 Forms**.

We recommend using **APEX EDI**.

Mark the **Insurance Carriers** you want to **Submit Claims to** by **Changing their Carrier Record**, using the **Utility Menu, Insurance Carriers Option**, then Setting the "Electronic Claims Yes/No" Field to "YES". You can even use an **Advanced Utility Menu, Global Changes Option**, to **Mark all Carriers as Yes**, then only **Change the Ones you don't want to send Electronically**, manually to **No**.

To **Submit Claims**, use the **Forms Menu "Electronic Claims" Option**.

Setup

Use the "Output File Name" Button to **define where the Generated Electronic Claim File Data** will be placed. You will have to give **this Information** to your **Clearing House**.

Submitting Claims

1. Use the **#1 NonSub Button to Add Account Numbers** to the **List** that should be there. **Account Numbers** can be **left out** if **Multiple People are Posting Charges at the same time**, if the **Electronic Claims Window is Open** when someone is **Posting**, or if someone didn't have the **Insurance Information** on their **Record** when the **Charges were Posted**.
2. Use the **#2 Pre-Edit Button**. It will review any **Potential Claims for the Account Numbers**, and you will see any **Possible Errors or Warning Messages** regarding the **Claims**. This way you can **Correct any Problems** before actually **Generating the Electronic Claims File**.
3. Use the **#3 Create ECF File Button**. This will **generate the Claims File to be Submitted**. When you do this, PowerSoftMD will not only **generate the Claims File**, but the **Patient Records** will be **Updated to Indicate the Claims have been Processed**.
4. Use the **#4 Web Submit Button**. This will **Check** to make sure you have a **Generated File to Send**, then **Open your Clearing Houses' Web Site**, and **Minimize the Electronic Claims Screen**. Typically this web address is available from Apex EDI, you can **Change the Site** that will be **Opened** by using **Top Toolbar "Tools" Option**, then **Click** on the "Edit Web Submit Button".
5. **Transmit your Claims** to your **Clearing House**, as per their Instructions.
6. **Restore the Minimized Electronic Claims Screen**, and use **#5 Clear Acct #'s**.

6. Use the "NonSub" Button to find Account Numbers that need to have **Claims Submitted** and **weren't originally Listed** on the Screen. This can happen if Someone Else is **Posting** while you have the Electronic Claims Screen **Open**, or if there were Claims that were originally **Posted (within the last 60 Days)** and there wasn't any Insurance Carrier Information on the Patient's Record, but it was **added later**, etc.

Researching Rejected Claims

Use the Top Toolbar "Tools" Option then "View Claims History" to look at **Past Data** that was **Generated to Submit** to your Clearing House. You will be **Prompted to Enter** the Month, then Year, the Claims were Generated (not the Dates of Service). An **Editor** will **Open Up with Data** for the **Entire Month**, you can use the Binoculars Icon to **Search for Specific Accounts**. We recommend **Searching by Account Number**. Remember if you have **Submitted a Claim or Claims for a Specific Patient Multiple Times** during the Month, then be sure to **Search for all the Entries**.

You can also **Look** at the **Claim Data** about to be **Submitted**, by using the **"NotePad" Button**, right after Using the **#3 Create ECF File Button**.

Notes:

- 1) To make sure all **Claims** are being **Sent**, use the **Report Menu**, then Select "**Insurance Tracking**", then Select the **Charges Not Submitted Report!** **This Report should be Ran on a Daily or a Weekly Basis!**
- 2) We highly recommend you **Check the Box** Marked "**Check to Use Patients Last Insurance Date**". This will cause the **Patients Insurance Screens** "**Last Claim Date**" plus **One Day** to be Used for the **First Date in the Range of Dates** to be **Submitted**.

26.1 TUTORIAL SESSIONS

The **Tutorial** or **Help Sessions** are quick **References of Subjects** from the **Primary Menu**. Use the Top Toolbar “**Help**” Option.

Pick from different Help **Text**, **PDF**, or **Videos**.

One of the **Topics** most used is **Enhancements**; it lists the PowerSoftMD **Enhancements** starting with the most recent. After you **install** a New Version of PowerSoftMD you should **review this Enhancements Topic**. You may also **Click a Button** to easily **Print It**.

Many **Individual Screens** have **Built-In Help Buttons** that give **Hints** for the Specific Screen.

Also, before using a **Function**, you may point the mouse to the **Function Button** on the Screen and wait a couple of seconds to see a **Brief Description of that Function** and how it might be used.

If you have **Speakers** and a **Sound Card** you can receive and use a **FREE PowerSoftMD Training CD**, as this is a highly recommended method of **Training**. It provides an easy-to-use **Menu System** that lets you **Select the Specific Topics** of Interest.

27.1 PRESCRIPTION SCREENS – Older Technique

This is an Older Technique for users that aren't using the Newer PowerSoftMD EMR Capabilities. If you are using the EMR "Electronic Medical Records" Features, then please refer to the EMR Users Guide, SOAP Notes Section.

You can Access a Patients Prescription Records from their General Information Screen. Then Select the Window Top Menu Option, and "Prescriptions".

On the Prescription Screen you can see up to 50 of the last Medicines, prescribed. All the Items are atomically stored in a Complete Log. And you can Print that Log with the Print Log or Script Button at the Bottom of the Screen.

Each time you add a particular Medicine to Someone's Prescription Record, you Click the Add Red Button in the Lower left-hand side. You would add Each Medicine one at a time. Let's say they were putting Medicines on one Prescription, you would use the Add Button 3 Times.

Print the Prescription with the Green Button it will actually let you Print the Entire Prescription for the Date, and it will have all the Medicines on it.

Prescriptions are Listed on the Screen, historically. You can Click on any Prescription Listed on the Screen, and it will come up and show you, the Details in a Window. If you've made a Mistake, and you've put a Prescription on the Wrong Person (for example). Merely, click on the Prescription on the Screen, and bring up the Detail Screen, there is a Button that says VOID, Click on It to Void the Prescription Record. You must have Appropriate Security to do this. If you Void an Entry by Mistake, Click on the Same Button to Un-Void It.

You can Create a List of Commonly-Used Pharmacies, or Drug Stores, by simply clicking on the Pharmacy Button at the bottom. Contact Data Tec, and we might be able to supply a Pharmacy List for Drug Stores and Pharmacies in your Geographical Area. When you go to Print a Prescription, on the Print Screen, there's a Button to let you Edit the Form. You can Edit the Form and put your Companies' Name and Address at the top of the Prescription Form easily.

If you can't access this Edit Function, then use your Windows, Programs, Accessories, and the Paint Program. Then open file
C:\EZW\MED\FORMATS\SCRIPT01.BMP

27.2 ADDING NEW PRESCRIPTIONS

There are several **Aids built into the Screen to add a Prescription**. If you **Click on the Date**, a **Calendar** will **Pop Up** to make it easy to put a **Date** in. If you **Click on the Yellow Pharmacy area**, a **List of Pharmacies** that you put in the Computer will come up, to let you **pick** from. If you **Click on the Prescription Area**, a **List of Prescriptions** will come up, also the Patients **Most Recent Prescriptions** will come up, listed over on the right or you can use the **Green Button** at the bottom to bring them up.

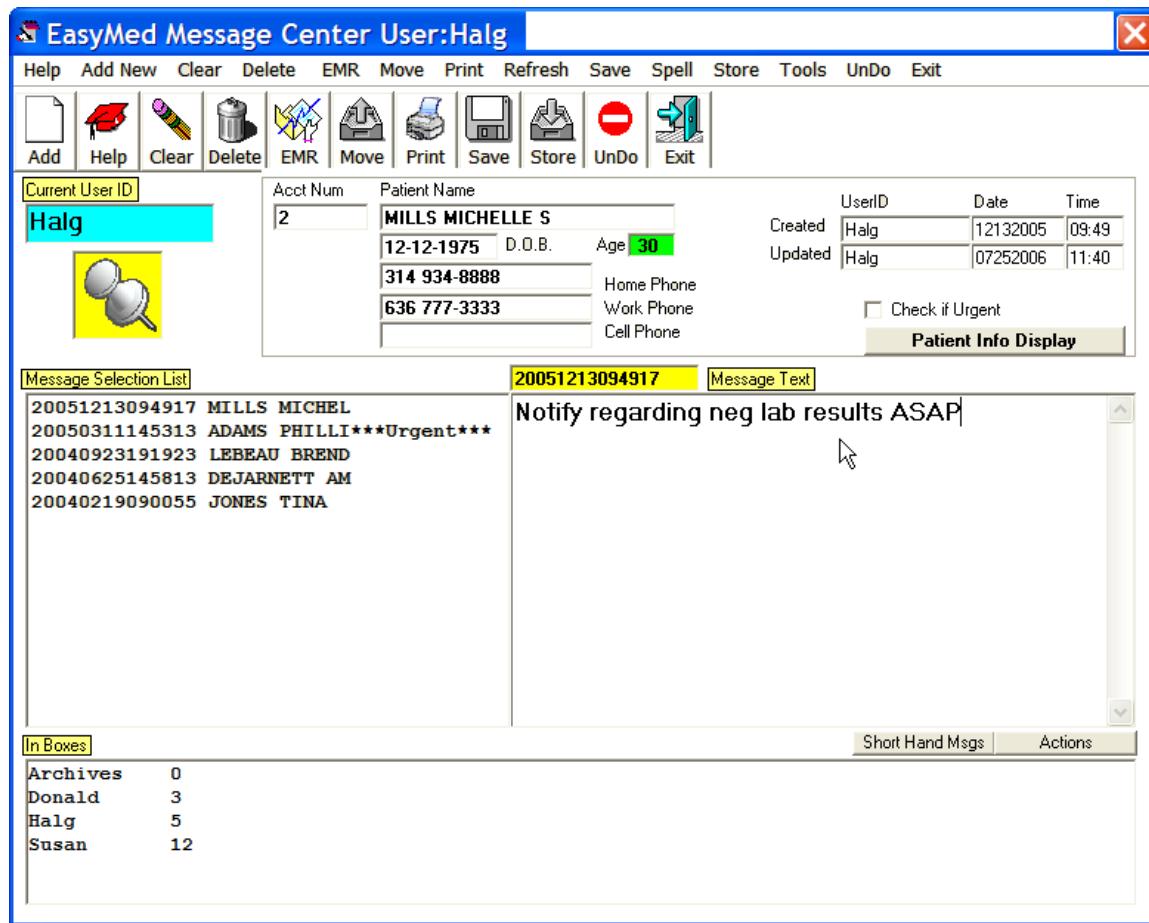
You can also **create a List of Common Prescriptions** you use for your **Patients** by using the **Update Script List Button** on the bottom right. The **Common Prescription List** can then be **displayed** for any Patient by **Clicking the White Common Prescription List Button**. You can also **add a Pharmacy** right here while you are on this **Screen**.

Once you've **entered the Information** that you want, it's very easy to **Click the Red Add Button** and **add this Particular Prescription** to the **Patients Record**. Each **Medicine** for a **Prescription** for a Certain Date is **added** in this manner. Then when you've added all the **Medicines for the Particular Prescription**, from the **Prescription Record Screen** you can **Print the Actual Prescription** with the **Green Prescription Print Button**.

28.1 MESSAGE CENTER

One of the most power **Features** of **EMR** is the “**Message Center**”. This lets you **Capture Patient** and other **Important Office Messages**, assign them to **Staff**, and **Save the Message** along with the resolutions.

You can **Access the Message** directly from the **Primary Menu**, or by using the “**Tools**” Option then “**Message Ctr**” while on the **EMR Screens**.



The first time a **User** enters the “**Message Center**” their **User ID** will automatically be added to the **List of “In Boxes”**. You can see the **List of “In Boxes”** and how **many Messages** each **User has**, listed on the bottom of the **Screen**.

Message Center Overview

Message Center is designed to be a **Central Place** to **create and distribute Messages** for the entire Office. At the same time, it will keep an **Optional Record of all Messages Received and Handled**.

You can **Create Two General Types of Messages**.

1. **Messages** regarding **Existing Patients**.

2. **Messages** for any **Other Topic(s)**, including **New Patients** that haven't arrived yet.

Once you are done with a **Message** you can **Delete It**, or **Store It**. If it's a **Note** regarding an **Existing Patient**, it is **stored** in the **Patient's Historical Notes Folder**. If the **Note** isn't about an **Existing Patient**, you can **store it in the Archive Folder** for the **specific Message Center User**.

You can also **Print** any **Message** you want.

Each **PowerSoftMD User** will automatically have a **Message In-Box** created the first time they **Access** the **Message Center Display**. All **In-Boxes** are **Listed** on the bottom of the **Message Center Screen**, along with a **count** of the **Number of Messages** in each **In-Box**. Since **Multiple Workstations** can be **adding Messages** at any time, the **Message count** is **automatically updated** every 5 Minutes. If you wish to **refresh** the **Message Count** at any time, just **Click the Refresh Option**.

If you **leave** the **Message Center Window** **idle** for more than 1 hour, it will **close** **automatically**.

Adding New Messages

Add a New Message by **selecting** the Top Menu **Add Message Option**. Then indicate if you want to **add a Message** for an **Existing Patient** or for **another Topic**.

If you are **adding a Message** for an **Existing Patient**, the **Patient Search Window** will be **displayed**. Here you can **search for Patients by Name, Social Security Number, Account Number, Birth Date, or Phone Number**. Once you **find the Patient** in the **List** you want, just **Click on the Name**, and their Name and Telephone Numbers will be **retrieved** for you, and a **New Message** will be **created**.

Each New Message will have a **Name** consisting of the **Date** and **Time of day** it was **created**. The **Format** is as follows: **yyyymmddhhmmss**
yyyy is the **Year**, **mm** the **Month**, **dd** the **Day**, **hh** the **Hour**, **mm** the **Minutes**, and **ss** for the **Seconds**.

In addition, the **Current User ID** will be **saved** as the **Person** that **created the Message**, along with the **Date and Time**.

When **changes** are **made** to the **Message**, automatically the **Current User ID** and **Date and Time** will be **Saved** and **Displayed** in the **"Updated"** **Fields**.

Actions List

You can **create** a pop-up List of **Sentences** relating to **actions taken** for **Messages**. Use the **Tools Option** to **create** and **update** this **List**. An example would be; "Doctor called, then Patient scheduled Appointment." Use the **Actions Button** on the **Message Text Window** to **select** from the **List**.

Clear Option

The Top Menu **Clear Option** used to quickly **clear all** the **Message Screen Fields**. If **any changes** were made to a **previously displayed Message**, they will be **saved** before the **Screen Fields** are **cleared**.

Data Entry

Simply **type** in the **text** you want in the **Message Area**. You can use the Standard Windows, Insert, Delete, Cut and Paste **Features**.

You should also set up **Shorthand Lists**. They can be used to **Pop Up a quick List** to select Complete Sentences or Phrases that will be **added to** your **Message Text**. Refer to the **Topic Actions List**, the **Topic Short Hand Msgs**.

You can **save your changes** by **pressing the Save Option**, or **Switching Functions**.

Remember, after 1 hour of **idle time** your **Last Message** will be **saved** and the Message Center Program will be **closed**.

Printing

It's easy to **Print a Message**. Just, **display the Message**, then **click** the Top Menu **Print Option!**

Refresh Option

The Top Menu **Refresh Option** is used to **refresh** the **Message Selection List** and the **In- Box Message Counts** listed on the bottom of the Screen. You can **Click this Option to Refresh the Information** at any time, but the **Refresh Option** will be **invoked automatically** every **5 Minutes**.

Save Option

The Top Menu **Save Option** will **save** your **latest changes** to the **Message** you currently have **displayed**. **Save** also **updates** the **Updated User ID, Date, and Time Fields**, unless the **Message Text Field** wasn't really altered. This way you can know the **Last Person** that **changed** the **Message Text**.

Short Hand Msgs

You can **create Two Separate Short Hand Lists** to help **enter Message Text**. Use the top Menu **Tools Option** to **create and revise these Lists**.

1. **Common Short Hand Messages** - Short Hand Messages all Users might like to use, for example:

"Patient Called, wants Refill".

2. **User Short Hand Messages** - Each **User** can have their **own Separate List** of Shorthand Text that will be listed right along with the Common List.

Store Message Option

The Top Menu **Store Message Option** moves the Displayed Message either to a **Patient Folder**, if the Message was added for an Existing Patient. Otherwise, the Message is stored in an **Archival Folder** for the **Current User**.

It's a good idea to **store most Messages** regarding Patient's, allowing you to keep a **Complete Record** of Communications. But, if you are not sure if you need to **save the Message**, for example: "Pizza Hut called to confirm Lunch Order", you can use the **Delete option** to get rid of the Message **without storing it**.

Switching Users

You can **switch to** any User by simply **Clicking on** the **User ID** displayed in the In-Box Window. You can also **switch Users** by selecting the Top Menu **Tools Option**, then **Switch User Id**.

If you take a Message for another Person, you can **create** the Message under Your User ID, then simply use the **Move Message Option** to place it in the Other Person's **In-Box**. There is no need to switch to their User ID, unless you want to read the Message in the other Persons In-Box.

Tools

The **Tools Option** will let you **update Pop-Up Lists** that can be used to make Data Entry much faster, and easier. You can **create a Common List** of Message Statements, for example: "Patient in Pain needs call-back".

Shorthand Lists are designed for the Original Message Text. The Action **Pop-Up List** is designed to indicate actions taken like; "Called Patient, to Schedule an Appointment".

Then use the **Button(s) on the Message Text Window** to quickly select from your **Customized List of Statements**.

UnDo Option

The Top Menu **UnDo Option** will **Restore** the Message Text Window to the **last Value** you **Saved** for the Open Message.

Deleting Messages

If you don't want to keep any Record of a Specific Message you can **delete it**. First, **Display** the Message, then **Click** the Top Menu **Delete Message** Option. You will be asked if you are sure you want to Delete It.

If the Message is something that you want to **keep a Record of**, use the **Store Message Option** instead.

Viewing Historical Patient Messages

You can **View any Messages** that were **Stored** for a Patient by Selecting the Patient from the EMR "Electronic Medical Records" Desktop. Then **Select Treatment Notes** and Press the **Message Ctrl Notes Button**.

In Boxes

Each PowerSoftMD User will **automatically have a Message In-Box created** the first time they **Access** the Message Center Display.

All **In-Boxes** are **listed** on the bottom of the Message Center Screen, along with a **Count of the Number of Messages** each **In-Boxes contains**. Since Multiple Work Stations can be **adding Messages** at any time the **Message Count is automatically updated** every 5 minutes. If you wish to **Refresh** the Message Count at any time, just **Click the Refresh Option**.

You can quickly **switch** to the **In-Box** of any **User** by **Clicking** on the User ID **Listed** in the **In-Box** Window.

Move Message Option

The Top Menu **Move Message Option** allows you to **Move a Message** from One Users Folder to another. Thus, reassigning the Message to another Staff Member.

First, a Message must be **Displayed**, then **Click on the Move Message Option** and a **List of Users** will be **Displayed**. Simply **Click** on the **User ID** you wish to **reassign** the **Message** to.