

***PowerSoftMD* Implementation Plan**

Step-up Steps

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

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Prior to Patient Visit

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

During Patient Visit

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

After Patient Visit

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

Daily Activities

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

PowerSoftMD Implementation Steps, cont.

Weekly Activities

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

Monthly Activities

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

Periodically

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