### List of Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Page #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install Medisoft Patient Accounting Demo</td>
<td>1-2</td>
</tr>
<tr>
<td>Install Medisoft Advanced Demo</td>
<td>2-3</td>
</tr>
<tr>
<td>Install Office Hours Professional</td>
<td>3-4</td>
</tr>
<tr>
<td>Make an Appointment</td>
<td>27-28</td>
</tr>
<tr>
<td>Enter a Break in the Appointment Book</td>
<td>29</td>
</tr>
<tr>
<td>Enter a Repeat Appointment</td>
<td>30-31</td>
</tr>
<tr>
<td>Print an Appointment Grid for the Week</td>
<td>33</td>
</tr>
<tr>
<td>Print an Appointment Grid for the Day</td>
<td>34</td>
</tr>
<tr>
<td>Add a Patient to the Recall List</td>
<td>35-36</td>
</tr>
<tr>
<td>Add a New Patient: Jenna Green</td>
<td>37-43</td>
</tr>
<tr>
<td>Add a New Patient: Kathy Patel</td>
<td>43-45</td>
</tr>
<tr>
<td>Add a New Patient: Tonya Brown</td>
<td>46-48</td>
</tr>
<tr>
<td>Enter Case Information: Jenna Green</td>
<td>48-53</td>
</tr>
<tr>
<td>Edit Patient Information: Jenna Green</td>
<td>54-55</td>
</tr>
<tr>
<td>Add a New Case for an Established Patient: Jenna Green</td>
<td>55-59</td>
</tr>
<tr>
<td>Add a Case for an Uninsured Patient</td>
<td>60-63</td>
</tr>
<tr>
<td>Print a List of Patients</td>
<td>64-66</td>
</tr>
<tr>
<td>Print Case Information: Jenna Green</td>
<td>66-67</td>
</tr>
<tr>
<td>Enter a New Charge: Jenna Green</td>
<td>68-70</td>
</tr>
<tr>
<td>Enter a Payment: Jenna Green</td>
<td>70-71</td>
</tr>
<tr>
<td>Enter an Adjustment: Jenna Green</td>
<td>72-74</td>
</tr>
<tr>
<td>Print a Claim: Jenna Green</td>
<td>74-75</td>
</tr>
<tr>
<td>Print a Primary Claim: Jenna Green</td>
<td>75-76</td>
</tr>
<tr>
<td>Enter a New Charge: Tonya Brown</td>
<td>76-77</td>
</tr>
<tr>
<td>Generate a Day Sheet: Tonya Brown</td>
<td>80-82</td>
</tr>
<tr>
<td>Generate a Procedure Day Sheet</td>
<td>82-83</td>
</tr>
<tr>
<td>Generate a Payment Day Sheet</td>
<td>84</td>
</tr>
<tr>
<td>Generate a Billing/Payment Status Report</td>
<td>84-85</td>
</tr>
<tr>
<td>Generate a Practice Analysis Report</td>
<td>86-87</td>
</tr>
<tr>
<td>Generate a Patient Aging Report</td>
<td>88</td>
</tr>
<tr>
<td>Generate an Insurance Aging Report</td>
<td>89</td>
</tr>
<tr>
<td>Generate a Patient Ledger</td>
<td>89-90</td>
</tr>
<tr>
<td>Generate a Patient Statement: Tonya Brown</td>
<td>90-91</td>
</tr>
<tr>
<td>Generate a Remainder Statement: Tonya Brown</td>
<td>91-92</td>
</tr>
<tr>
<td>Generate a Completed CMS: Michael Youngblood</td>
<td>92-93</td>
</tr>
<tr>
<td>Generate a Superbill: Dwight Again</td>
<td>94</td>
</tr>
<tr>
<td>Set Up a New Practice: Dr. Phyllis Malloy</td>
<td>94-96</td>
</tr>
<tr>
<td>Enter Provider Information: Dr. Phyllis Malloy</td>
<td>96-98</td>
</tr>
<tr>
<td>Create a List Containing Patient Addresses</td>
<td>98-101</td>
</tr>
<tr>
<td>Create a List of Employers</td>
<td>101-102</td>
</tr>
<tr>
<td>Create a List of Patients</td>
<td>103-109</td>
</tr>
<tr>
<td>Create a List of Insurance Carriers</td>
<td>109-113</td>
</tr>
</tbody>
</table>
Create a List of Diagnoses 113-114
Enter Procedure, Payment, and Adjustment Codes 114-117
Enter an Allowed Amount Using Medisoft Advanced 118-119
Enter a New Case: Joan Q. Adams 119-121
Enter a Transaction Using Medisoft Advanced: Joan Adams 121-122
Enter a New Case: Miriam Cohen 122-123
Enter a Transaction: Miriam Cohen 123-124
Print a Receipt for Miriam Cohen 125
Create an Insurance Claim: Miriam Cohen 125-126
Enter a Payment: Miriam Cohen 127
Enter a New Case: Karen Wang 127-128
Enter a Transaction: Karen Wang 128
[1] Instructions for Installing:
   1. Medisoft Patient Accounting Demo
   2. Medisoft Advanced Demo
   3. Medisoft Office Hours

[2] Instructions for Installing Medisoft Patient Accounting Demo

1. Insert the Medisoft 12 CD in your local CD-ROM drive. The IntroDisc window appears.
   
   NOTE: If the IntroDisc window does not appear automatically, click your Start button on the bottom left of your screen. Select Run. The Run window appears. On the Run window in the Open field, type X:\AUTORUN (where X is your CD-ROM drive letter) and click OK.


3. On the Medisoft IntroDisc window click on Install Demo.


5. On the Welcome window click Next. The Demonstration Type window appears.

6. On the Demonstration Type window make sure Medisoft Patient Accounting Demo is selected and click Next.

7. On the End User License Agreement window, click I Accept. The Select Installation Type window appears.

8. On the Select Installation Type window, make sure that Express Install is selected then click on Next.
9. On the Ready to Install window, click Next. The Installing window appears and tracks the progress of the installation.

NOTE: If you do not have the current .NET framework on your computer, NET is installed during the installation. The NET installation on may PCs can take up to 15 minutes.

10. Once the installation the Installation Completed window appears. Click Finish. The installation program closes.

[2] Instructions for Installing Medisoft Advanced Demo

1. Insert the Medisoft 12 CD in your local CD-ROM drive. The IntroDisc window appears.

NOTE: If you have already inserted your CD-ROM from having installed the Medisoft Accounting Demo then click your Start button on the bottom left of your screen. Select Run. The Run window appears. On the Run window in the Open field, type X:\AUTORUN (where X is your CD-ROM drive letter) and click OK.


3. On the Medisoft IntroDisc window click on Install Demo.


5. On the Welcome window click Next. The Demonstration Type window appears.

6. On the Demonstration Type window make sure Medisoft Advanced Demo is selected and click Next.
7. On the End User License Agreement window, click I Accept. The Select Installation Type window appears.

8. On the Select Installation Type window, make sure that Express Install is selected then click on Next.

9. On the Ready to Install window, click Next. The Installing window appears and tracks the progress of the installation.

10. Once the installation the Installation Completed window appears. Click Finish. The installation program closes.

[2] Instructions for Installing Office Hours Professional

1. Insert the Medisoft 12 CD in your local CD-ROM drive. The IntroDisc window appears.

2. NOTE: If you have already inserted your CD-ROM from having installed the Medisoft Advanced Demo then click your Start button on the bottom left of your screen. Select Run. The Run window appears. On the Run window in the Open field, type X:\AUTORUN (where X is your CD-ROM drive letter) and click OK.

3. On the IntroDisc window click on the Office Hours Pro Demo.

4. On the Office Hours Professional window click on Install Demo.

5. The Warning window appears. On the Warning window click Next.

6. On the End User License Agreement window, click I Accept. The Select Installation Type
window appears.

7. On the Select Installation Type window, make sure that Express Install is selected then click on Next.

8. On the Ready to Install window, click Next. The Installing window appears and tracks the progress of the installation.

9. Once the installation the Installation Completed window appears. Click Finish. The installation program closes.

[1] Introduction to Medisoft

MediSoft is a program specifically designed to computerize basic administrative functions in a health care environment. It allows you to organize information by patient, by case, and by provider. With Medisoft you can schedule patient appointments with a computer; take electronic progress notes; create lists of codes for diagnosis, treatment, and insurance; submit claims to primary, secondary, and tertiary insurers; and receive payments electronically.

[1] A Brief Introduction to the Windows Environment:

MediSoft for Windows operates in a Windows environment. It is necessary to be familiar with
Windows terminology to fully appreciate and utilize MediSoft.

[2] WINDOWS XP

Computer hardware cannot function without instructions. These step-by-step instructions are called programs or software. There are two basic kinds of software: application and system. Application software helps to do a specific task; for example, a word processing program helps you type a letter or memo; MediSoft helps computerize administrative functions in a health care environment. System software takes care of tasks for the computer. The most important piece of system software is the operating system (OS). Every computer has an operating system that takes care of routine tasks.

A mouse is an input device attached to the computer by a cable. It has one, two, or three buttons on the top and a ball on the bottom. When you move the mouse across a flat surface (a mouse pad), a mouse pointer moves on the screen. There are several basic mouse operations:

- **Pointing** is moving the mouse across a flat surface.
- **Clicking** is pressing and releasing the left mouse button.
- **Double-clicking** is quickly pressing and releasing the left mouse button twice.
- **Right-clicking** is clicking the right mouse button. It opens a shortcut menu.
- **Dragging** is holding down the left mouse button while moving the mouse.
Your work area, the screen on which icons and windows are arranged, is called the **desktop**. Across the bottom of the desktop is a **taskbar**. The taskbar displays a button for each open application. At the left of the taskbar is a **Start button**. Clicking Start causes a menu (list of choices) to pop up. You can execute most tasks by sliding the mouse pointer to the option you want and clicking. If an option has a right pointing arrowhead next to it, another menu will drop down; move the mouse pointer to that menu, slide it to your selection, and click.

When you first launch Windows, there are several icons on the desktop. An icon is a little picture representing a program or piece of hardware. To open an icon into a window (a rectangular area surrounded by a border), point to the icon and double-click. In Windows, applications (programs) run in Windows and Documents open in Windows.
The Start button is the first thing on the taskbar. It allows the user to access programs and shut down the computer.

Icons on the desktop (such as these) represent programs or hardware. Icons can be opened into windows by pointing and double-clicking.

The taskbar contains the Start button, and a button for every running application. On this taskbar, you can see buttons for WordPerfect, Windows, and Paint.

If you point to Programs (or click on it) another menu will appear.

The Start menu pops up when the user clicks on the Start button.

Click on Shut Down, to shut down the computer.
The Parts of a Window

One of the features of the Windows environment is a common user interface; this means that every window has similar parts. Across the top is a title bar with the window title in it. At the right of the title bar are three buttons: the minimize, maximize or restore, and close buttons.
Clicking the minimize button does not cause the application to stop running; the button still appears on the taskbar, although you no longer see an open window. Clicking the maximize button causes the window to expand to fill the screen and a restore button to replace the maximize button. Clicking the restore button causes the window to resume its former size. Clicking the close button closes the window; the application is no longer running, and its button is no longer on the taskbar.

Some windows have other components. Below the title bar (in windows that run applications) is a menu bar. Toolbars may appear below the menu bar and let you execute a command by clicking on a button. Across the bottom of a window, a status bar gives you information about the open window.

If the contents of a window are not completely visible, scroll bars appear across the bottom and/or down the right side of the window. A scroll bar contains two scroll arrows and a scroll box. To move through a window, click on the arrow pointing in the direction you want to go, or click above or below the scroll box, or drag the scroll box.
The Parts of a Window

A menu is a list of commands. You can choose an item from the menu by highlighting it and then pressing the Enter or Return key, or by simply pointing to the item with the mouse and clicking the left mouse button. When you choose a command that is followed by an ellipsis (three dots …), the command is not immediately executed. Instead, a window called a dialog box opens. A dialog box is a window used when the computer needs more information.

Dialog boxes may have one or more of the following elements:

- **Tabs** look like file folder tabs. They appear at the top of the dialog box and are used to switch to a different page of the dialog box.
• **Text boxes** allow you to enter data.

• **List boxes** display a list of choices. Click on the option to make a choice.

• **Drop-down list boxes** contain a down arrow; click on the arrow to display the choices. Click on the option to make a choice.

• **Command buttons** are rectangular buttons that execute commands. OK and Cancel are common.

• **Check boxes** are square boxes that you can click on or off. More than one may be chosen.

• **Option buttons** are round. Only one may be selected; however, one MUST be selected.

• **Spin boxes** allow you to make a choice by clicking on an up or down arrow.

• **Slide boxes** let you to make a choice by moving a slider bar.
Using MediSoft in the Medical Office

The Patient Information Form

When a patient schedules an appointment, it is recorded in MediSoft’s Electronic Appointment Book. At or before a patient’s first visit, he or she fills out a Patient Information Form. It includes personal data such as name, address, contact phone numbers, date of birth, and Social Security number. The patient is also asked to fill in information about his or her spouse or partner. In addition, the patient is asked to provide insurance information for him- or herself and a spouse or partner. This information includes the name of the primary, secondary, and tertiary insurance carriers, name and birth date of the policyholder, the co-payment, and policy and group numbers.

Coding Systems: CPT AND ICD-9-CM

Categories of information on patients such as personal, medical, and insurance information when entered into Medisoft becomes part of the patient record. Some of it is translated into codes before it is entered. Codes provide standardization which allows the easy sharing of information. Because codes of diagnoses and procedures are precise and universally used, one physician can recognize another’s diagnoses and procedures codes immediately.

Services including doctor office visits, tests, lab work, exams, and treatments are coded using the most up-to-date CPT (Current Procedural Terminology) codes. The ICD-9-CM provides 3-, 4-,
or 5-digit codes for more than 1,000 diseases. The ICD is the *International Classification of Diseases*, 9th ed, *Clinical Modification*. Both the CPT and ICD-9-CM coding system make electronic claims forms easier to file because each condition or disease, each service, procedure, and diagnostic test can readily be identified by established several-digit numbers. The codes are standardized, but no practice uses all of them. When a new practice is set up, only codes that relate to its specialty are entered in one of the tables of codes; these tables can always be amended. The CPT codes that are most frequently used by the medical office are preprinted on the encounter form (also called the superbill). Some practices also print the diagnosis codes on this form.


MediSoft is essentially an accounting program. Therefore, several definitions are required. **Charges**, **payments**, and **adjustments** are called **transactions**. A charge is simply the amount a patient is billed for the provider’s service. A payment is made by a patient or an insurance carrier to the practice. An adjustment is a positive or negative change to a patient account. Transactions are organized around cases. A **case** is the condition for which the patient visits the doctor. There can be several visits associated with one case. There can also be several cases (one for each diagnosis) for one patient. The information entered in Medisoft for a patient’s case is entered by the medical office staff and stored in the practice’s database tables. When you add a case, the patient’s insurance information is entered. Due to this fact, it is important to create a new case if the patient’s insurance changes. A case can be closed when the patient’s condition is resolved.
Claims

To receive payment for services from an uninsured patient, the practice simply bills the patient.

To receive payment for services rendered to an insured patient, the practice must submit a claim to the insurance carrier. A claim is a request to an insurance company for payment for services. If an insurance carrier requires a treatment plan, MediSoft enables you to create one.

The hard copy insurance claim form is called the CMS-1500. An EMC (electronic media claim) is an electronically processed and transmitted claim and is called an X12837. To create a claim to submit to an insurance company, the practice needs to gather certain information: the patient’s condition, the physician’s diagnosis, and the procedures performed in the office or hospital. The patient record provides personal data, medical history, and insurance information. The provider table can supply information about the physician.

From the time a patient is charged for a procedure to the time when all payments have been received and credited to the patient’s account, there is a sequence of accounting events that occur. Accounts Receivable (A/R) include any invoices outstanding or any payments from the patient or insurance carriers to the medical practice. The diagnoses and procedures relevant to a patient’s visit are recorded on an encounter form (also called a superbill). An encounter form is a list of diagnoses and procedures common to the practice. Either the night before, or the next morning, encounter forms are printed for the scheduled appointments. Information taken from
the superbill is utilized in several MediSoft accounting reports.

[2] Accounting Reports

MediSoft provides the user with various kinds of reports that are generated on a daily, monthly, or yearly basis. Daily reports include a **patient day sheet**, a **procedure day sheet**, and a **payment day sheet**. A patient day sheet lists the day’s patients, chart numbers, and transactions. It is used for daily reconciliation. A procedure day sheet is a grouped report organized by procedure. This report is used to see what procedures each health care worker is performing. It also can be used to find the most profitable procedures. A payment day sheet is a grouped report organized by providers. Each patient is listed under his or her provider. It shows the amounts received from each patient to each provider.

A **practice analysis report** is generated on a monthly basis, and is a management tool for tracking procedures performed during a specified period, payments received, and adjustments made to accounts for those procedures. (Medisoft Help Tool)

Medisoft provides two patient aging reports: **Patient Aging** and **Patient Aging Applied Payment**. These reports help identify accounts with balances that are past due. The basic differences between these two reports are that the Patient Aging Report includes unapplied payments in the totals but has no Date From Range filter. The Patient Aging Applied Payment Report excludes
unapplied payments from the totals and has a Date From Range filter. (Medisoft Help Tool)


To launch MediSoft, do the following:

• Double-click the Medisoft Patient Accounting Demo icon on the Windows desktop.

   NOTE: If this is the first time running, it will install some tutorial data before it can used.

You will see the MediSoft window with the MediSoft title and words “Tutorial Data” within the title bar:

Below the title bar, the menu bar contains the names of the pull-down menus. You pull down a menu by clicking on its name.
• The **file menu** contains many options. The most commonly used options are
  
  • Open practice opens the database for an established practice
  
  • New practice sets up a new database for a new practice
  
  • Other options allow the user to back up and restore data, set the program date, enter
    practice information, and perform file management tasks.
  
• The **edit menu** contains options to cut, copy, paste, and delete information (which becomes
  enabled once information is placed within a field).

• The **activities menu** contains options that allow the user to manage finances, insurance
  claims, and appointments, and to enter patient, diagnosis, procedure, and case information.

• The **lists menu** contains options that allow the user to enter and edit patient information, case
  information, procedure/payment information, adjustment codes, diagnosis, insurance and
  billing codes, and information on providers and referring providers

• The **reports menu** contains a list of predefined reports, as well as custom reports and bills
  that the user can design. Almost all printing is done from the reports menu.

• The user can access a calculator through the **tools menu** or view the contents of a file. The
  tools menu also allows the user to create reports, customize menu bars, and view system
  information.

• The **window menu** resembles the window menu in any Windows application, allowing the
  user to switch between open windows.
• The **services** menu provides information on subscribing to a prescription writing service OnCallData™ NDC Health. The tab also provides the capability of retrieving updates for this service.

• The user can find assistance from the MediSoft **help menu**.

Beneath the menu bar is the **MediSoft toolbar** (sometimes called the **speed bar**). The toolbar icons function in MediSoft in the same way that they function in any Windows application—they give the user fast access to common functions.

The taskbar is at the bottom of the Windows desktop and contains the Start button, a clock, and buttons for each open application.

Immediately above the taskbar is the status bar, which provides context-specific information, such as the page number and the date.
Above the status bar is the function help line (also called the shortcut bar), which contains commonly used function keys. In MediSoft, function keys work as **global commands**—commands that work from any point in the program:

- **F1**  
  Opens Help files in most windows
- **F3**  
  Save
- **F6**  
  Opens a search window
- **F7**  
  Opens the Quick Ledger window
- **F8**  
  Opens a window to create a new record
- **F9**  
  Opens a window to edit the selected record
- **F11**  
  Opens the Quick Balance window
- **ESC**  
  Closes or cancels current function or window

To activate a function key requires pressing the function key on the keyboard rather than clicking any pictures of the function keys that may appear on the screen.

[1] **GETTING STARTED: Making an Appointment Using Office Hours**

If you (the medical office worker) are not looking at the MediSoft window, launch MediSoft by double-clicking on its icon on the desktop. The first contact between the prospective patient and
a health care provider’s office is the phone call to set up an appointment. The patient makes a phone call. The medical office worker who responds needs to access MediSoft’s **electronic appointment book**.

Do the following:

Pull down the Activities Menu and choose appointment book; however, it is faster to click on the appointment book icon.

The **office hours** program and MediSoft’s two-paned appointment scheduling module window will appear.
Make sure the window title says “Office Hours—Medical Group (Tutorial Data).” At the beginning we will be working with tutorial data provided by MediSoft.

[2] The Office Hours Toolbar

Once you have the office hours window on your screen, you will see that a toolbar is provided. As in the Medisoft program, the office hours software allows you quick access into various areas by selecting the appropriate icon.
[2] A Note about Dates

MediSoft works with two dates: the **Windows system date** (today’s date) on the taskbar, and the **MediSoft date** (the date the health care administrator is using) on the status bar. Because in some health care environments not all transactions are entered on the date they occurred, you need to know how to set both dates so that they are correct for the data for which you are entering information.

To change the MediSoft date: Double-click the date on the status bar and a calendar will pop up. Change the month using the left or right arrow and change the day by clicking on the day you want. Press Enter. The year can be changed by clicking on the year shown.
To change the Windows system date: double-click the time on the taskbar and a calendar will pop up.

![Date and Time Properties](image)

Using the arrow keys the date and time can be adjusted as needed. Click OK once your changes are made.

[2] The Office Hours Window

Office hours is MediSoft’s appointment scheduling software and comes in a basic and professional version. The professional version has added options and is sold separately from MediSoft. Office hours can be launched by double-clicking on its icon on the desktop or from
within MediSoft. In Medisoft you can launch Office Hours by double clicking on the icon with the clock face or go to Activities on the Menu Bar and click on Appointment Book.

Office hours displays one month’s calendar with today’s date highlighted in the left pane. The right pane displays several columns for the appointments. The columns are not for multiple booking; they are meant for a health care practice with several providers. You can move the calendar backward and forward using arrow keys.

![Office Hours](image)

Notice that on the appointment side, blocks of time are set aside and color coded for activities that happen each day (e.g., lunch), for appointments with patients, and for other events. The appointment book toolbar contains icons that give quick access to common functions.
In **office hours professional** icons at the bottom of the window allow the user to change the view of the calendar.

![Calendar View](image)

The default choice, displayed on the office hours window, is the current month calendar on the left and the day’s appointment calendar on the right (as can be seen in Figure 1-15)).

When the second icon from the left is clicked, a one month’s calendar on the left is displayed and displayed on the right is a week’s appointment schedule with appointments and other events indicated for the provider listed on the toolbar.
The next icon when clicked displays the month’s calendar on the left; on the right every day of the month appears.

![Calendar](image)

In an office where multiple providers have appointments scheduled, the last icon offers the capability of viewing appointment schedules for all the providers for the day selected.

To return to a view of one day, click on the icon furthest from the right.

![Appointment View](image)

Click the down-arrow to select a provider. The following will appear:

Using the Medisoft Office Hours Program, select a provider from the drop-down provider list box. Double-click on 8:30 A.M, in Column 2. The New Appointment Entry dialog box will appear.

Fill in the information requested, either by using drop-down lists (for the chart number, resource) or by entering information. After selecting the patient, press tab and MediSoft should automatically fill in the phone number, date, time, the case number with corresponding
description, the length, and provider. Fill in the reason for the appointment by clicking on the reason drop-down list, clicking on description, and selecting existing patient. Save the appointment.

As soon as you save the appointment, it appears on the day’s appointment calendar.

[2] Break Entry

To enter a break, for example, a lunch break that occurs every day, click on the time (12:00 A.M.)
and then click on the break entry icon. In the break list window, click on new. The following dialog box will appear.

Fill in lunch, and make sure All Columns is checked and All providers. Click on the Change box and indicate that lunch takes place weekly, Monday-Friday. Prior to exiting the Change dialog box, click ok.

Click save and the following will appear:


To enter repeating appointments, the user can click on the Go to Date icon
You can instruct the program to display a date that is any number of days, weeks, months, or years from today’s date to make an appointment that needs to be periodically repeated. For example, if you go to a date seven days from now, that day’s appointment calendar will be displayed and you can enter the appointment.

**NOTE: WHEN A DATE NEEDS TO BE ENTERED IN THE GO TO DATE DIALOG BOX ENTER IT IN AN EIGHT-DIGIT FORMAT - MMDDYYYY. YOU MUST USE THE FOUR DIGITS OF THE YEAR (2008, FOR EXAMPLE).**

To enter a repeating appointment for Dwight Again: On March 11, as he is leaving, he might ask for an appointment in a week. Click on the Go to Date icon and fill in 7 in go ___ days, then click on go. This will bring the calendar for March 18 onto the screen, and you can enter an appointment.

If you need to find the next open appointment, you can use find open time by choosing it from the office hours edit menu or clicking the Search for Open Time Slot icon on the toolbar. (As you place your cursor over each icon note that on the bottom left side of your window will appear the description of the icon you have highlighted). Click on the search icon. A dialog box will be displayed.

The user fills in the required information. Does this patient need an 8:15 A.M. appointment on Friday? Click on the day (Friday); fill in the start time (8:15 A.M.); and click search.
The next available open time slot on a Friday at 8:15 A.M. will be surrounded by a heavy border. Double-click the time slot and this dialog box appears:

You need to fill in the chart number by typing in the first few letters of the patient’s last name. If a second appointment is needed, click on the Search Again icon. Each time you use search again, it brings you to the next available time slot on a Friday at 8:45 A.M.

[2] Printing Appointments

To print the day’s appointment list, click on the printer icon, and then click OK. In MediSoft
Office Hours Professional, you can easily print the **appointment grid** for the day or the week.

To print the week’s grid, make sure you are looking at the week’s calendar. This is done by clicking on View on the menu bar and then Week View. Once you are viewing the entire week of appointments, click on Reports on the menu bar and select print appointment grid. From the fly-out menu choose Print in Grid View. The following will print:

<table>
<thead>
<tr>
<th>Appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happy Valley Medical Clinic</td>
</tr>
</tbody>
</table>

To print the day’s appointment grid, make sure you are looking at the day’s calendar by selecting Day View from the View menu bar. Pull down the reports menu and choose print appointment
The difference between printing the Grid View vs. the List View is that the Grid View provides you a view of the appointment book with its columns and time slots. The List View allows you to view a list of patients with their appointment times indicated.

Tip: When moving between the appointment window and Medisoft window, minimize the appointment window.

Many patients need follow-up appointments in a week or a month or a year. MediSoft allows the user to create and edit a patient recall list. In the MediSoft Window (not the appointment book window), pull down the lists menu and select patient recall. The following window will appear:

![Patient Recall List](image)

To add a patient to the recall list, click the New button. When the Patient Recall (new) window appears, information is requested by making choices from the drop-down lists. After you select the chart number, MediSoft fills in the patient’s name and phone numbers. You need to choose the procedure and type the message. (You can search Procedure Code by using the Up/Down Arrow or type the procedure name). Make sure at the bottom of your recall window that the recall status “Call” is selected.
Click on the Save button. Next click on Lists, go to patient recall and look to see that what you entered appears on the recall list.
When a new patient comes in for a scheduled appointment, the patient fills out forms with personal, health, insurance, and other information. The doctor enters diagnoses and procedures on the Encounter Form. All this information could be kept on paper. However, entering it into a computerized relational database such as MediSoft means that the information will be kept in an organized fashion and it will be easy to access. Information is entered using on-screen forms; as you save it, it becomes part of a table in a relational database. If you edit and save a record on one form, that information is changed in other tables in which it appears. If information is only entered once, this means a great saving in time and effort. It also helps guarantee that information for a patient or case is the same everywhere it appears.

We will start by entering patient and case information. MediSoft is basically an accounting program, and although we are starting with patients and cases, some of the information we enter has a bearing on what we do later, for example, entering transactions and handling claims. An insurance carrier is the health insurance company that insures a patient. The type of insurance a patient has—Medicare or private, managed care, or none—will reverberate throughout other functions in the program. The first patient we will enter is Jenna Green; she is over age sixty-five and therefore has federal medical insurance called Medicare. The second patient we will enter is Kathy Patel and she has just graduated from college; she is no longer under her parents’
insurance policy and only has a part-time job. She cannot afford private insurance, so she has none. The last patient is Tonya Brown, whose medical insurance is one of her benefits as a full-time teacher. She has Aetna US Health Care for primary insurance and Blue Cross/Blue Shield as secondary insurance. Both are Preferred Provider Organizations (PPOs), which is a type of managed care. In the exercises that follow this chapter, you will enter a record for yourself. You have managed care, but the type you have is an HMO (Health Maintenance Organization).


To enter Jenna Green, launch MediSoft, select the icon Patient Lists or select Lists from the menu bar and then select Patients/Guarantors and Cases.
Make sure you are using the tutorial data. The left pane contains a list of patients: chart number, name, address, phone numbers, Social Security number, indication if signature is on file, patient type, gender, date of birth, provider, payment information, and employment data. However, to see all of this information, the user must scroll to the right.

Case numbers are assigned by MediSoft. At the top of the window are two circular buttons—one for cases and one for patients. Make sure patient is selected. (See image above) Notice that this list is sorted by chart number. The chart number consists of the first three letters of the patient’s last name, the first two letters of the first name, and three additional digits. You can indicate which field you want to search on, although the chart number is the default. To search for a patient, start typing in the Search Box, and as you type it will display what matches your input.
At the bottom of the window are a series of command buttons.

Edit patient allows you to see and change information in an existing patient’s chart. New patient allows you to add a new patient. Delete patient allows you to delete a patient. If the case option button had been chosen, these command buttons would have been modified and would have allowed you to edit case, add a new case, and so on.

- Begin entering Jenna Green by typing in her last and first name as requested on the Patient/Guarantor (new) screen.
- When you tab from the second address line, MediSoft brings you to the zip code. Fill in the ZIP. If MediSoft is familiar with that ZIP (if it appears previously), MediSoft will fill in the city and state for you. Otherwise you have to fill in this information yourself. Phone numbers can be entered without parentheses and hyphens; MediSoft automatically inserts them.
- Type all dates using 8 digits (e.g. 1/1/09 = 01012009)• After completing the form, click the Save button in the upper-right corner or press F3. MediSoft enters a chart number for you. MediSoft also checks for duplicate Social Security numbers.
One other thing to keep in mind, as you enter information into the two tabbed areas (patient information tab and other information), you can either click on save once you have entered information in each tabbed area or you can wait until all of the information in both areas has been entered and then select save. Some individuals prefer to select save each time a tabbed area is completed to ensure that information is not accidentally deleted or lost.

Complete the following:

- Click on the New Patient button or press F8. The following dialog box appears:
• Add the following data:

• Tab over the chart number to the Last Name field.

• With the insertion point in the last name field, type Green.

• Tab to the first name field and type Jenna.

• Add the rest of the information (omitting chart number): Street Address – 6060 Amsterdam Avenue, New York, NY, 10025, USA; (maximize your screen if you haven’t already done so), Home Phone – 2128646710 (no hyphens); Birth Date – 11/20/1935 (eight-digit format); Sex - Female; Social Security Number – 111223334 (No hyphens).
Save the record. Look at the patient list. Jenna Green is correctly placed in chart number order. (You will have to scroll to the left to see her name).

You could click on the other information tab and add her provider, but there are other places to add the provider. We will add it when we add her new case information.


Kathy Patel had been using her college’s health services and her parents’ insurance until graduation. Because she was only able to get a job defined as part time, she has no health insurance. She calls the medical group practice to tell them she would like to become their patient, but does not make an appointment at this time. They send her the forms she needs to fill
out. She returns the completed paperwork, and a medical office worker enters the information into MediSoft’s patient table in the practice’s database.

To enter Kathy Patel as a patient, do the following:

- If not already done, launch MediSoft.
- Pull down the lists menu and select patients/cases and guarantors. Press F8 or the new patient command button.
- Fill in the following information:
• Notice that when you enter the ZIP and press the Tab or Enter key, MediSoft fills in the city and state.

• Press the Save button or press F3.

• Press Enter. You will see Kathy Patel’s name in the patient list.

• Open her record, and you will see the chart number MediSoft assigned.

• Click on the Other Information tab and enter the information below. Make sure you enter “C” for cash. Each patient must have an assigned provider chosen from the drop-down list on the other information tab. Choose J.D. Mallard, MD (JM) as the assigned provider. The
Signature on File check box indicates whether or not the patient’s signature is on file; check it so that the patient does not have to sign each insurance form; All insurance companies that the provider represents requires this box to be checked.

When finished entering a patient’s information, press the Save button or press F3.


Tonya Brown is a full-time teacher at a public school with a strong faculty union. One of the negotiated benefits is medical coverage. She had a choice of plans, and chose Aetna because all
the health care providers she visited were in the Aetna network of providers, as was the better hospital in her neighborhood. As a secondary insurer, she selected Blue Cross/Blue Shield.

Enter Ms. Brown in the patient table by doing the following:

• If not already done, launch MediSoft and pull down the lists menu.

• Choose Patients/Guarantors and Cases.

• Press the new patient button or press F8 and fill in the following information. When you click on save or press, MediSoft will assign a chart number (BROTO000).

When you do this it takes you back to the Patient List.
• With Tonya Brown highlighted, click the Edit Patient button.

• Click the other information tab and fill in the following:

![Patient / Guarantor: Brown, Tonya]

• Press the save button or press the F3 function key.


Remember that Jenna called to make an appointment. Her reason for seeing the health care provider is called a case. There can be more than one visit associated with one case. For example, a child with an ear infection needs to make two visits. As long as the underlying
condition remains the same, many visits constitute one case. And of course there can be many different cases associated with one patient.

To add a new case for Jenna, do the following:

• Click on Jenna’s record in the patient list.

• Make sure the Case button is chosen.

• Click the New Case button or press the F8 function key.

You will see the following tabbed dialog box with the personal tab chosen and the name and guarantor filled in.
• Fill in the rest of the information.

• Click on Save or press the F3 Function key; you will be told that there is no assigned provider. Click ok.

• Click on the account tab.

• Click the down arrow in the assigned provider drop-down list box and select Melvin Morris.
• Click the down-arrow in the **case billing code** drop-down list box and choose “M” for Medicare.

• Click on the save button or press the F3 function key.

**Note:** As you go through and complete each of the tabbed dialog boxes you can either click the save button each time the tabbed area is filled in or you can wait until all of your information is entered in the tabbed boxes. Some recommend that you save as you go since this will ensure no information is accidentally deleted. If in saving you are brought back to the list of patients/cases and guarantors, click on the patient you are entering and click the edit patient command button. If you are entering a case, click on the patient, click on the case option button, and click on the edit case command button.
• Click on the policy 1 tab and select Medicare from the Insurance 1 drop down list. In the policy holder 1 tab select the patient’s name from the drop down list. To save your information, again press the F3 function key or select the save tab on the right side of your screen.

• Click on the condition tab.

• Fill in the information by typing in the date, and making choices from drop-down lists for the other fields. Do not fill in anything in fields that are blank.
• Press the save command button or press the F3 function key. By clicking on the F3 key each time you enter new information, you are ensuring that your newly added information is never lost. You can go through and update the various fields without clicking F3 until you are completely done, but you are then risking losing your information as you go.

• Click on the diagnosis tab and fill in the diagnosis by clicking on the down-arrow in the default diagnosis 1 drop-down list box. You will have to either scroll through the choices until you see “fracture, finger” or click on the magnifying glass to obtain the search window. Click on fracture, finger. MediSoft fills in the code.

• Under Allergies and Notes, type “Allergic to aspirin.”

• Click the save button or press the F3 function key.
Once a patient is entered in the system, it is possible to change patient information. If Jenna calls to say she has moved to a new address, do the following:

- Pull down the lists menu.
- Choose patients/guarantors and cases.
- In the dialog box that opens, choose the Patient option button.
- Click on Jenna’s record.
- Click on the Edit Patient button.
- Enter the new address: 123 Broadway.
• Click the save button or press the F3 function key.

Jenna has one follow-up appointment for her broken finger (two appointments for one case).


A few days later Jenna woke up with a sore throat and called the health care provider. She made an appointment. Pull down the patient list, and make sure it is sorted by chart number. On the patient list, it is easy to find a patient by typing in the first three letters of the patient’s last name. Enter GRE as a search term.

Once you have found the patient, do the following:

• Choose the Case option button. You could click on new case. However, if you did that you would have to reenter much information that remains the same.
• Click on copy case.

• Change the information that needs to be changed.

The following dialog box will appear:
Do the following:

- Change the description to sore throat.

The case number will be assigned by Medisoft once the information is saved. All other information on this screen remains the same.

- Click the save button or press the F3 function key.
• Click on the diagnosis tab. The following screen appears:

![Image of the screen with diagnosis options]

- Click the down-arrow in the default diagnosis 1 drop-down list box and select strep throat.
- Click the save button or press the F3 function key.
- Click the condition tab.
• Click the save button or press the F3 function key.

Look at the patient list. Click on Jenna Green. Click on patient. You will see two cases associated with Jenna Green’s name.
Kathy Patel was jogging when she tripped and sprained her ankle. She called the practice to make an appointment. Remember that she had already filled out the patient information form and that that data had been entered. To add the case information, do the following:

- Pull down the lists menu and choose patients/cases and guarantors.
- Select Kathy’s record.
- Click on the case option button.
- Click on the New Case Command button and fill in the following information on the personal page of the dialog box:

![New Case Dialog Box](Image)
• Press the Save button.

• Click on the Account tab and make sure the following information is entered:

• Click on the Diagnosis tab.
• Click the down-arrow in the default diagnosis 1 drop-down list box and select sprained ankle.

• Press the Save button.
• Click on the Condition tab and fill in the following information:

![Condition tab interface]

• Press the Save button.

• If an error message appears that says a provider has not been selected, select J.D. Mallard, MD (JM) and then press the save button.

Because she has no insurance, that is all the information you need to fill in.
In MediSoft (Version 12), most printing is done from the reports menu. To print a list of patients:

- Pull down the Reports menu and select custom report list.

The following list will be displayed:
• Scroll down until you see patient list.

• Select patient list.

• Click OK.

• In the print report where? dialog box, make sure Preview the report on the screen is selected and click start.

The next screen asks for the range of chart numbers you want to print.

• Leave the range blank to print all records.

• Click OK. A patient list will appear on the screen. To see the list of patients, press the
arrow key at the top to go to the second page. Do not print it at this time. Print it only after completing all the Hands-on Exercises at the end of the chapter. To print, you will click on the print icon.

In addition to the standard Medisoft Version used to teach Medisoft in training settings, there is a Medisoft Advanced Version that provides additional functions. For instance, in MediSoft Advanced (Version 12), you can print from almost any window.

[2] **Printing Case Information**

The steps to print case information are very similar to the steps for printing patient information.

- Pull down the reports menu and select custom report list.
- Select patient face sheet.
- Click ok.
- Select preview the report on the screen.
- In the data range dialog box, enter the chart number for Jenna Green in both boxes next to Chart Number Range. Click ok. To view Jenna’s report, be sure and go to the second page of the report.
Print the report only after completing the Hands-On Exercises.

[1] TRANSACTION ENTRY

Once a patient is established and has at least one case associated with her/him, transactions must be entered and claims sent to the insurance carrier (or bills to the patient). A transaction can be a charge to a patient’s account, a payment made by an insurance company or the patient, or an adjustment to the patient’s account (adjustments are discussed in the next section).


In MediSoft Version 12, to enter a transaction pull down the activities menu and choose enter transactions or use the quicker method by selecting the Transaction Entry icon. The following dialog box appears:
Scroll down so you can see this entire page. As you will notice there are two sections to this window. The top portion allows you to enter charges. The lower portion allows you to enter payments and adjustments.

To enter a new charge for Jenna Green, do the following:

- Pull down the chart drop-down list box and select Jenna Green’s chart number
- Pull down the case number drop-down list box and select sore throat as the case. Your dialog box should appear similar to the following:

![Transaction Entry dialog box](image)

- Click new (you are entering a new transaction) then click on the first blank line under the word date.
• Use the drop down box to select the correct date (04/01/2009).

• Click in the procedure box. Use the drop down box to select the correct CPT code for Culture, Strept Screen.

Note: Each procedure has a CPT code. Some codes also have modifiers made up of one or two digits. Modifiers allow a more detailed description of the procedure. Note the multilink command button. Multilink codes are groups of CPT codes that relate to one activity. Using multilink codes saves time.

• Click on the Amount box and MediSoft will automatically fill in the price charged by the practice once you press enter or tab to the next item.

• Ensure that the Diag 1 box is filled in with the diagnosis.

• Ensure that the correct provider is selected in the provider box.

• The amount allowed by the insurance company for the procedure is called the Allowed Amount. This information in the Allowed Amount tab will appear once the transaction has been entered and saved. Medicare, for example, allows $9.00 for a strep culture for which the practice charges $15.00. The $6.00 is an adjustment to the patient’s account.
Once you reenter into the transaction entry screen the allowed amount will appear.


It is important to document in the transaction record adjustments and payments. This is done in the payment, adjustment and comments area.
On Jenna Green’s transactions we must show that Medicare will pay $9.00 for the step culture and that an adjustment of $6.00 must be made to the account.

[3] Entering the Payment

To enter the payment amount to the allowed amount follow these steps:

- Click on “new” in the Payments, Adjustments, and Comments section.
- Click on the date and enter the date of the patient’s visit (04/01/2009).
- Then indicate the payment or adjustment code in the next box by finding the code and description in the drop down box (MP – Medicare-Payment).
- Next select the group/individual who made the payment as indicated in the drop down box (Medicare-Primary).
- The description of the payment if any further details are needed.
- Ensure the correct provider is listed correctly.
- Enter the payment amount in the next box (in the Amount box the payment of $9.00 should be entered).
- If a check number is applicable note it.
- At the end of the 1st line, choose “New”.


[3] Entering the Adjustment

- Enter the same date of 04/01/2009.
- In Payment/Adjustment Code box select MED ADJ (Medicare Writeoff) from the drop down box.
- The group/individual who paid (Medicare-Primary) should be indicated in the next field.
- The description of the adjustment, if any, would be entered next.
- Ensure the correct provider is listed correctly.
- Enter the adjustment amount in the next box (in the Amount box the adjustment should be $6.00).
- If a check number is applicable note it.
Once all of your information has been entered press the Apply button on the left hand side of the window. Don’t press the save transactions button yet. Procedure charges and payments are linked through the apply payment to charges dialog box. A dialog box appears where you can enter the adjustment amount in the payment box. Once you have done so you can close the Apply Payment to Charges window.

Note that on your transaction window that the $9.00 has not been applied. Click the Apply button and enter the amount of $9.00.

Once you have entered the $9.00 in the payment box you can again close the Apply Payment to Charges window.

After all of your payment/adjustment information has been entered, click the Save Transactions
button. In the section that shows the patients total charges and payments, the following should be seen.

![Image of Transaction Entry]

You can print the claim by clicking on the **print claim** button.

**[1] CLAIM MANAGEMENT**

You can see the billing status of your claims by printing a primary claim summary. Click on the reports menu and click custom report list. Select primary claim summary. Click OK. On the print report where pop-up, click Start. Fill in only the Claim Number Range (1-9) and click OK.
View the Primary Claim Summary as provided on the 2nd page of the report.

[2] Printing a Primary Claim Summary

You may now print a primary claim summary for Jenna by doing the following:

• Pull down the reports menu and choose custom report list.

• Select primary claim summary.

• Click OK.

• Select preview the report on screen and click Start.

• Fill in GREJE000 in both the chart number range dialog boxes.
• Click OK.

• You can see the status of the claim and print it. (Be sure to look on Page 2 of the report to view the summary information).

To enter a new transaction for Tonya Brown, do the following:

• Click on transactions entry icon or pull down the activities menu and select enter transactions.

• Using the drop down box, select the chart number of the patient BROTO000.

• In the Charges Section, select New to enter the information for the new transaction. Fill in the procedure by clicking on the down-arrow in the procedure drop-down list box and selecting X-ray chest, 2 views. Once the procedure is filled in, MediSoft fills in the charge.

To indicate that a payment of $42.40 has been received from the Aetna, you need to fill in the date of the payment (4/1/2009), the code to indicate where the payment has originated (AP), once the code has been selected, Medisoft will fill in Who Paid. If there is any description of the payment it should be entered. In this case, enter the word “check” then enter the check number. Enter the amount paid and then save your transaction.
• Click the Apply button and the following dialog box will appear.

• In the Apply Payment to Charges box, fill in 42.40 as the payment.

When you are done entering your applied amount, click on the Update All button to see all the changes. The account total will be $10.60 which is the patient’s ultimate responsibility. Save the transaction.

To see the status of all of your office’s insurance claims, pull down the activities menu and select claim management.
The screen shows the status of every claim. The claims are organized in **batches**, according to when they were created. The status of a claim includes whether it was submitted on paper or electronically, whether it is ready to send or has been sent to the primary insurer, the response from the primary insurer, whether or not claims are ready to send or have been sent to the secondary carrier. The status of each claim includes the response from the carrier.

[1] **ENTERING DEPOSITS** Payments must be deposited. As discussed earlier, in Medisoft Version 12, payments can be applied when entering transactions. In Medisoft Advanced Version 12, deposits can be entered and a list of deposits can be creating by pulling down the activities menu and selecting Enter Deposits and Payments. To see all deposits click on Show All Deposits.
BEWARE OF MAKING SURE YOU ARE WORKING WITH THE ADVANCED VERSION WHEN THIS IS INDICATED.

[1] QUICK LEDGER AND QUICK BALANCE

Another function available when using the Medisoft Advanced Version is to obtain a quick summary of a patient’s procedures or billing and payment status. This can be done by pulling down the activities menu and selecting patient ledger. Once the patient’s chart number is selected from the drop-down box the following window will appear:

![Quick Ledger window](image)

It can be printed by clicking on the print icon on the bottom of the screen.
If you simply want the patient’s balance, pull down the activities menu and select quick balance. Enter the chart number of the patient, and the following will appear:

![Quick Balance](image)

This can be printed by clicking on the print command button.

[1] PRINTING REPORTS

MediSoft provides structures for all types of reports. The user selects the report structure, and filters out records that he or she is not interested in by filling out a data selection screen specifying a range of chart numbers and dates. MediSoft then fills in the contents of the report—inserting data from a file into the report structure chosen.

[1] DAY SHEETS

MediSoft provides various reports which can present data in an attractive and useful format. One type of report is the patient day sheet that is used for daily reconciliation. It lists the day’s
transactions. To create a patient day sheet for Tonya Brown, select day sheets. Click on the reports tab and from the fly-out menu select Day Sheets, and then Patient Day Sheet. On the data selection screen, enter Tonya’s chart number in both the “from” and “to” boxes. In the date created range, change the date to read from 1/1/1900 to the present date. Leave the dates from range as is. Check Show Accounts Receivable Totals and then click Preview Report.
Once the Preview Report button has been selected the Day Sheet on Tonya Brown should be generated (see page 2 on the report):

![Patient Day Sheet Image]

**[2] Procedure Day Sheets**

A patient day sheet lists procedures, codes, and amounts owed under each patient. On the other
hand, a procedure day sheet lists a procedure and grouped by each separate procedure performed, the charge for each service, and a list of patient names. To create a procedure day sheet choose Reports, Day Sheets, Procedure Day Sheet. To view all procedures, leave the procedure code field blank. In the date created range, change the date to read from 1/1/1900 to the present date. Leave the dates from range as is. Check show accounts receivable and then click Preview Report. You will get a report listing every day, every patient, grouped under the procedure name (see page 2 on the report for the patient information).
[2] Payment Day Sheets

Follow the same steps to generate a payment day sheet. The payment day sheet groups patients by their health care providers, so that the user of this report can see the payments received by each provider.

[1] BILLING/PAYMENT STATUS REPORT

When using Medisoft Advanced Version 12, you can print a billing/payment status report,
which shows current billing, payment, and claim status of each transaction. To obtain this report, pull down the reports menu and select analysis reports.

From the fly-out menu under Reports, select Billing/Payment status. On the data selection screen, leave all boxes blank. Check show all transactions and then preview report. The following report is generated (see the 2nd page on the report for details).
[1] ANALYSIS REPORTS

In Medisoft Version 12, a Practice Analysis Report is provided. When using Medisoft Advanced Version 12, an additional analysis report, the Insurance Analysis Report, is included.


A practice analysis report is usually generated monthly. However, it can be used for any specified time, for example, a quarter or a year. It provides a summary of activity for the period chosen. Go to reports. Click on analysis reports, and then practice analysis. Leave all fields on the data selection screen blank, and click Preview Report. The following report is generated.
As you can see, all procedure codes and descriptions are listed, with the charge, the number of times the procedure was performed, the average charge, any costs, and the net.


An insurance analysis report can be created when using Medisoft Advanced Version 12. This report is created by pulling down the reports menu, selecting analysis reports, and then insurance analysis report. Leave all data selection fields blank and click Preview Report.

![](image)

This report lists each insurance carrier that has been billed, amounts and percentages of claims, charges, and payments.
[1] AGING REPORTS

Various aging reports are available when using Medisoft Version 12. These reports assist the medical office in managing the financial aspects of the practice.

[2] Patient Aging Reports

To create a patient aging report, pull down the reports menu, choose aging reports, and select patient aging. Leave all data selection questions blank and click Preview Report. As with all other reports, the details of the report start on page 2. A patient aging report lists each patient and the amount each owes to the practice by number of days: current 0–30, past due 31–60, past due 61–90, and over 90 days. It also lists the total amount each patient owes and each patient’s phone number.

Also in the Report menu is an insurance aging report that lists claims filed by each insurance company by days: current 0–30 from billing date, 31–60, 61–90, and over 90 days. Below is an example of a Primary Insurance Aging Report:

![Primary Insurance Aging Report](image)

[1] PATIENT LEDGER

A patient ledger displays the status of each patient’s account, past activity, and billing history. To print all patient ledgers, pull down the reports menu and choose patient ledger. Note that the balance range and dates are already filled in. Leave these as is and click Preview Report. You
can print just one patient ledger by filling in a specific patients’ chart number. The following patient account ledger groups the information under each patient’s chart number, name and date, and amount of last payment, place of service, description of the payment, procedure code, provider, and amount, with a total amount for each patient.

![Patient Account Ledger](image)

[1] PATIENT STATEMENTS

MediSoft provides several different statement formats. Like other reports, the patient statement can be filtered by selecting a particular date range and a specific patient or patients. To print a patient statement, click reports, then patient statements. Next, choose patient statement, click ok,
and indicate that you would like to preview the report on the screen, click start. The data selection dialog box filters out all patients except Tonya Brown by choosing her chart number only. Once Tonya Brown’s chart number has been selected Click OK. The following statement appears on the screen and can be printed.

As you can see, transactions for Tonya and her last payment are listed. The position of the two addresses at the top allows you to send these statements in window envelopes.

[1] REMAINDER STATEMENTS

A remainder statement is sent only after all insurance carriers have paid. This report can be
sent when using Medisoft Advanced Version 12. To generate a remainder statement, pull down the reports menu, choose patient statements and choose remainder statement (all payments). Click OK and then Start to preview the report on the screen. Fill in the data selection dialog box for Tonya Brown’s remainder statement. Click OK, and the following report will appear listing a patient’s date of procedure, the procedure, the amounts paid by the primary and secondary insurers, and the remainder to be billed to the guarantor.

![Remainder Statement Example](image)

[1] CUSTOM REPORTS

MediSoft has many custom reports. Click on custom report list. To see the rest of the custom reports, scroll down. Choose Laser HCFA (Primary) W/Form (Note: The HCFA form is now called CMS). Click OK. Click start to preview on the screen. Put the chart number in only for
Michael Youngblood. Leave the remaining fields in the data selection dialog box blank, and click OK. The filled-out CMS form will appear on the screen.
To look at superbills, choose superbill from the report list. Click Ok. Then Click Ok for the Report Title of Superbill (Numbered). Select start to preview the report on the screen. From the drop down box, select the chart number for Dwight Again in both the from and to Chart Number Range. Leave the data selection dialog box dates as is and enter no further information. Click OK.

Practice Activities

Setting up a New Practice

[1] ENTERING PRACTICE INFORMATION If you are starting a practice or computerizing an existing practice using MediSoft, there are several tasks you need to complete.

To set up a new database file, do the following:

- Pull down the File menu and choose new practice.
• Enter the practice name (Dr. Phyllis Malloy). You need to create a folder for the database.

• Your data path will be C:\MediData\Malloy so enter Malloy in the Enter the Data Path text box.
• Click create.

• In the confirm dialog box that opens, click yes.

• With the practice window information showing, fill in Dr. Malloy’s practice information as presented below and Save the record.

![Practice Information](image)

[1] ENTERING PROVIDER INFORMATION

Next, you need to enter provider information for Dr. Malloy. To enter provider information, do the following:

• Pull down the Lists menu, click Provider, and select Providers in the fly out window or click
on the Provider List icon.

- On the provider list window, click New.

- Add the following information:

- Next enter Dr. Malloy’s default PIN information by clicking the Default Pins tab. Enter the information as shown here
• Click the Save button to save your entry. Then close the Provider List window.

[1] ENTERING ADDRESS INFORMATION

The Medisoft software program provides the capability of storing address information that is important to the practice. To enter information in the address list, either click on the address list icon on the toolbar or pull down the lists menu and choose addresses. Click the new command
button. In the dialog box that opens, do not fill in the code field, rather tab over the code field and enter the following information and choose the type from the drop-down list:

- Once your information has been saved, Medisoft will assign a code to the patient. The information will appear on the address list.
• Perform the same steps to enter the rest of the patients’ addresses.

Add the following to the address list. Each type is miscellaneous.

Santiago, Rose

35 East 102nd Street

New York, NY 10025

Shah, James

345 Amsterdam Avenue

New York, NY 10025

Wang, Amy

444 Central Park West

New York, NY 10025

Wang, Karen

444 Central Park West

New York, NY 10025
Williams, Franklin D.
125 Columbus Avenue
New York, NY 10025

Add a record for yourself. Be sure to save after adding each record.

Still using the address list dialog box, now you need to create new records for the following employers. As each record is saved a code will be assigned.

Middlesex County, College
2600 Woodbridge Avenue
Edison, NJ 08816
732-555-2526

S & A Bank
436 Apple Street
New York, NY 10025
212-555-0002
After saving this information, check to see if the Field box on the address list indicates that the list will be sorted by Code. Be sure and select code from the drop down field list. By selecting code, all of your entries will be organized alphabetically by code. With the Code selected, your address list would be seen first. If in the Field box Type is selected, your employer entries will be seen first in the address list window, with patient entries following.
[1] ENTERING PATIENT INFORMATION

To enter a list of patients that use Dr. Malloy’s practice. Do the following:

- To enter patient data click on the Patient List icon and select the New button or pull down the lists menu and choose Patients/Guarantors and Cases.

- Click New.

- Enter the following information in the name, address page of the dialog box:

  - Last Name Adams
  - First Name Joan
  - Middle Initial Q
  - Street 540 Broadway
  - Zip 10025
  - City New York
  - State NY
  - Phone 2125559999
  - Birth Date 5/25/1946
  - Sex Female
  - SSN 111111111
You do not enter a chart number. MediSoft will automatically enter it for you when you save the record.

- Click the other information tab and enter the employer (MID00), employment status (part time). Check signature on file and enter 5/10/1979 as the date. This means she will not have to sign each insurance form.

- Save the record.

- You will be brought back to the patient list.

Add the remaining patients using the same steps as performed above.

- Last Name Williams
- First Name Franklin
- Middle Initial D
- Street 125 Columbus Avenue
- Zip 10025
- City New York
- State NY
- Phone 2125557777
- Birth Date 2/7/1953
- Sex Male
• SSN 333333333

• Assigned provider (PM).

• Employer is Micro-Mania, and he is employed full time.

• Signature has been on file since 2/10/1995.

• Last Name Shah

• First Name James

• Middle Initial

• Street 343 Amsterdam Avenue

• Zip 10025

• City New York

• State NY

• Phone 2125552222

• Birth Date 7/14/1960

• Sex Male

• SSN 222222222

• Assigned provider – PM

• Employer is the S&A Bank; he is employed full time.
• Signature is has been on file since 2/10/1985.

• Last Name      Cohen
• First Name     Miriam
• Middle Initial B
• Street         785 West End Avenue
• Zip            10025
• City           New York
• State          NY
• Phone          2125556710
• Birth Date     5/7/1937
• Sex            Female
• SSN            555555555

• Assigned provider - PM.

• Signature has been on file since 5/10/1955.

• Last Name      Santiago
• First Name     Rosa
• Middle Initial
• Street 135 East 102 Street
• Zip 10025
• City New York
• State NY
• Phone 2125558888
• Birth Date 9/6/1973
• Sex Female
• SSN 444444444

• Assigned provider – PM
• Last Name Wang
• First Name Amy
• Middle Initial
• Street 444 Central Park West
• Zip 10025
• City New York
• State NY
• Phone 2125550000
• Birth Date 7/25/2001
• Sex Female
• SSN 666666666
• Assigned provider – PM
• Last Name Wang
• First Name Karen
• Middle Initial
• Street 444 Central Park West
• Zip 10025
• City New York
• State NY
• Phone 2125550000
• Birth Date 5/3/1970
• Sex Female
• SSN 777777777
• Assigned provider - PM.
• Signature has been on file since 3/30/1995.
The patient list should resemble the following:

Each time a new patient is entered Medisoft assigns a chart number. If you cannot view the chart number on the patient list, close out the patient list, then select Lists from the toolbar and go into Patient/Guarantors/ and Cases to view the lists where now the chart numbers will appear.

[1] ENTERING INSURANCE CARRIERS

To create a list of insurance carriers, pull down the lists menu and choose insurance, and then carriers. In the dialog box that opens, click new and then add the following information.

- **Name**: Aetna
- **Address**: PO Box 960
- **City**: Bluebell
- **State**: PA
- **Zip**: 19422
• Phone 8005551122
• Extension 4
• Fax 8005551123
• Contact Jane Smith

• Click the options tab. Click the down-arrow next to type and scroll down to select HMO.

• Save the record and MediSoft assigns a code.

Add the remaining insurance carriers using the same steps as performed above.

• Name Blue Cross/Blue Shield
• Address 88 Broad Street
• City Philadelphia
• State PA
• Zip 17109
• Phone 2155559089
• Extension 49
• Fax 2155559088
• Contact

• Type is Blue Cross/Shield.
• Name Medicaid
• Address 123 Broadway
• City New York
• State NY
• Zip 10025
• Phone 212555675
• Extension 49
• Fax 212559088
• Contact

• Type is Medicaid.

• Name Medicare
• Address 89 Main Street
• City Newark
• State NJ
• Zip 06000
• Phone 273554321
• Extension 6789
- Fax 2735554322

- Contact

- Type is Medicare.

- Name CIGNA
- Address 123 West 73rd Street
- City New York
- State NY
- Zip 10025
- Phone 2125555675
- Extension
- Fax 212555678

- Contact

- Type is HMO.

- Name Hancock Worker’s Compensation
- Address 1 Delaware Street
- City Washington
• State  DC
• Zip  30000
• Phone  8005551074
• Extension
• Fax  8005551075
• Contact

• Type is Worker’s Comp. Your insurance carrier list should resemble the following:

![Insurance Carrier List](image)

[1] ENTERING DIAGNOSIS CODES

To add a list of the diagnoses common to Dr. Malloy’s practice, do the following:

• Pull down lists and choose diagnosis codes. Diagnosis codes are added one at a time.

• Click new and fill in the following information:

• Code 1  034.0

• Description  Strep Throat
• Save the record.

• Click new and fill in the following information to add a second diagnosis code:

• Code 1 052.9

• Description Chicken Pox

• Save the record. On your own, add the rest of these diagnosis codes.

---

[1] ENTERING PROCEDURE, PAYMENT, AND ADJUSTMENT CODES

The method in which procedure, payment, and adjustment codes are entered depends on the Version of Medisoft you are using. When using Medisoft Basic Version 12, CPT codes are entered in the system as follows:

• Click on the CPT icon or pull down the lists menu and select procedure, payment, and adjustment list. Click new. A two-tabbed dialog box is displayed. You will need to fill in
information on each page of the dialog box for each code.

- Enter 36215 as Code 1.
- Enter Lab Drawing Fee as the description.
- Click on Inside Lab Charge as the code type (select it using the drop-down arrow in the code type drop-down list box).
- Enter 5 as type of service. The type of service is very important to indicate correctly since this identifies if the service is a charge, payment, adjustment, or procedure.
- Enter 0 as time to do procedure.
- Click on the amounts tab and enter 8 as charge amount A. The amount refers to the price charged for the service by the practice.
- Save the record.

Add the rest of the information for the codes, description, amounts and types as entered here: (Be very careful to enter the correct type for each code.)

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
<th>AMOUNT</th>
<th>TYPE DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>71020</td>
<td>X-ray, Chest 2 Views</td>
<td>$53.00</td>
<td>Procedure charge</td>
</tr>
<tr>
<td>80050</td>
<td>General Health Screen Panel</td>
<td>$45.00</td>
<td>Outside lab charge</td>
</tr>
<tr>
<td>82954</td>
<td>Glucose Test</td>
<td>$10.00</td>
<td>Inside lab charge</td>
</tr>
<tr>
<td>Procedure Code</td>
<td>Description</td>
<td>Charge</td>
<td>Payment Type</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------------</td>
<td>---------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>84704</td>
<td>Pregnancy Test</td>
<td>$25.00</td>
<td>Inside lab charge</td>
</tr>
<tr>
<td>85023</td>
<td>CBC</td>
<td>$18.00</td>
<td>Inside lab charge</td>
</tr>
<tr>
<td>87072</td>
<td>Culture, Strep Throat</td>
<td>$15.00</td>
<td>Procedure charge</td>
</tr>
<tr>
<td>93000</td>
<td>Electrocardiogram-Interp/Report</td>
<td>$45.00</td>
<td>Procedure charge</td>
</tr>
<tr>
<td>97010</td>
<td>Hot/Cold Pack Therapy</td>
<td>$10.00</td>
<td>Procedure charge</td>
</tr>
<tr>
<td>99213</td>
<td>Office Visit Established Patient</td>
<td>$225.00</td>
<td>Procedure charge</td>
</tr>
<tr>
<td>AP</td>
<td>Aetna Payment</td>
<td>$0.00</td>
<td>Insurance payment</td>
</tr>
<tr>
<td>BLU</td>
<td>Blue Cross/Blue Shield</td>
<td>$0.00</td>
<td>Insurance payment</td>
</tr>
<tr>
<td>BLUADJ</td>
<td>Blue Cross/Adjustment</td>
<td>$0.00</td>
<td>Insurance adjustment</td>
</tr>
<tr>
<td>CASH</td>
<td>Cash Payment – Thanks!</td>
<td>$0.00</td>
<td>Cash payment</td>
</tr>
<tr>
<td>CHECK</td>
<td>Personal Check Payment</td>
<td>$0.00</td>
<td>Check Payment</td>
</tr>
<tr>
<td>CIG</td>
<td>CIGNA Payment</td>
<td>$0.00</td>
<td>Insurance payment</td>
</tr>
<tr>
<td>CIGWROFF</td>
<td>CIGNA Write-off</td>
<td>$0.00</td>
<td>Insurance adjustment</td>
</tr>
<tr>
<td>COPAYCASH</td>
<td>Cash Copayment</td>
<td>$0.00</td>
<td>Cash co-payment</td>
</tr>
</tbody>
</table>
Your Procedure/Payment/Adjustment list should resemble the following:

<table>
<thead>
<tr>
<th>Code 1</th>
<th>Code 2</th>
<th>Code 3</th>
<th>Type</th>
<th>Description</th>
<th>Type of Service</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>AP</td>
<td>AP</td>
<td>AP</td>
<td>I</td>
<td>Aetna Payment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BLUADJ</td>
<td>BLUADJ</td>
<td>BLUADJ</td>
<td>T</td>
<td>Blue Cross/Adjustment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BLU</td>
<td>BLU</td>
<td>BLU</td>
<td>I</td>
<td>Blue Cross/Blue Shield</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C0PAYCASH</td>
<td>C0PAYCASH</td>
<td>C0PAYCASH</td>
<td>I</td>
<td>Cash Copayment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CASH</td>
<td>CASH</td>
<td>CASH</td>
<td>M</td>
<td>Cash Payment - That</td>
<td></td>
<td></td>
</tr>
<tr>
<td>85023</td>
<td>85023</td>
<td>85023</td>
<td>C</td>
<td>CBC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CIG</td>
<td>CIG</td>
<td>CIG</td>
<td>I</td>
<td>CIGNA Payment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CIGWROFF</td>
<td>CIGWROFF</td>
<td>CIGWROFF</td>
<td>T</td>
<td>CIGNA Write-off</td>
<td></td>
<td></td>
</tr>
<tr>
<td>87072</td>
<td>87072</td>
<td>87072</td>
<td>A</td>
<td>Culture, Step Throat</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33000</td>
<td>33000</td>
<td>33000</td>
<td>A</td>
<td>Electrocardiogram-In</td>
<td></td>
<td></td>
</tr>
<tr>
<td>80050</td>
<td>80050</td>
<td>80050</td>
<td>D</td>
<td>General Health Screen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>82354</td>
<td>82354</td>
<td>82354</td>
<td>C</td>
<td>Glucose Test</td>
<td></td>
<td></td>
</tr>
<tr>
<td>97010</td>
<td>97010</td>
<td>97010</td>
<td>A</td>
<td>Hot/Cold Pack, Ther</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36215</td>
<td>36215</td>
<td>36215</td>
<td>C</td>
<td>Lab Drawing Fee</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>99213</td>
<td>99213</td>
<td>99213</td>
<td>A</td>
<td>Office Visit Establish</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHECK</td>
<td>CHECK</td>
<td>CHECK</td>
<td>N</td>
<td>Personal Check Pay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>84704</td>
<td>84704</td>
<td>84704</td>
<td>C</td>
<td>Pregnancy Test</td>
<td></td>
<td></td>
</tr>
<tr>
<td>71020</td>
<td>71020</td>
<td>71020</td>
<td>A</td>
<td>X-ray, Chest 2 Views</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

An advantage of using the Medisoft Advanced Version 12 is that when you enter procedure and payment codes you can enter the allowed amount that is the contracted dollar amount that the insurance company pays the practice for each service. For example, it may pay 80 percent of the allowed amount. Medisoft uses the allowed amount to calculate insurance responsibility, patient responsibility, and adjustments. The 20 percent – the difference between the allowed amount and the insurance payment – is the patient’s responsibility. The difference between the allowed amount and the full charge (called an adjustment) is written off by the practice.
For instance, to enter the allowed amount using the Medisoft Advanced version, do the following:

- Click on the CPT icon or pull down the lists menu and select procedure, payment, and adjustment list. Click new. A three-tabbed dialog box is displayed.

- Enter 97540 as Code 1.

- Enter Phys Therapy/Life Management as the description.

- Enter Procedure charge as the code type (select it using the drop-down arrow in the code type drop-down list box).

- Enter A as service classification.

- Click on the amounts tab and enter 30 as charge amount A.

- Click on allowed amounts tab and enter the following information and then save the record:

<table>
<thead>
<tr>
<th>Insurance Name</th>
<th>Code</th>
<th>Modifiers</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aetna</td>
<td>AET00</td>
<td></td>
<td>15.50</td>
</tr>
<tr>
<td>Blue Cross/Blue Shield</td>
<td>BLU00</td>
<td></td>
<td>15.50</td>
</tr>
<tr>
<td>CIGNA</td>
<td>CIG00</td>
<td></td>
<td>15.00</td>
</tr>
<tr>
<td>Hancock Worker’s Compensation</td>
<td>HAN00</td>
<td></td>
<td>10.00</td>
</tr>
<tr>
<td>Medicaid</td>
<td>MED00</td>
<td></td>
<td>13.45</td>
</tr>
<tr>
<td>Medicare</td>
<td>MED01</td>
<td></td>
<td>13.00</td>
</tr>
</tbody>
</table>

Unlike Medisoft Advanced Version 12, the Basic Version does not allow for the entering of
allowed amounts in the procedure/payment/adjustment area. Instead, allowed amounts must be
added in the transaction payment area as a write-off. In Medisoft Advanced, adjustments and
write-offs are also entered on this list. In Medisoft Basic, these are entered under payments and
adjustments on the transaction window. An adjustment is a positive or negative change in a
patient’s charge. For instance, a charge may be added to a patient’s account, if an account is sent
to a collection agency. An adjustment is entered in the same way as a payment, and needs to be
applied to the patient’s account after all insurances have paid.

[1] ENTERING CASES

Enter a new case for Joan Q. Adams by doing the following:

• Click on the Patient List icon or pull down the lists menu and select Patients/Guarantors and
   Cases

• Click on Joan Q. Adams and click the case option button.

• Click the new case.

• The personal tab is the default tab. Fill in the description (Strep Throat), the marital status
   (Single), and the student status (Part Time).

• Click on the account tab and click on the arrow in the provider drop-down list box and select
   Dr. Malloy.

• Click on the diagnosis tab and select strep throat from the default diagnosis 1 drop-down list.
• Click on the condition tab and fill in the Illness and Consultation Date as today’s date, the illness indicator (Illness), Unable to Work (today-three days from now) by selecting from drop-down lists or typing it.

• Click on the policy 1 tab and enter Aetna as Insurance 1, relationship to insured (self), policy number (111111111), group number (02001), policy dates (9/1/2000), annual deductible (500.00), copayment amount (10.00), insurance coverage percents by service classification (80).
• Click on the Save button on the upper right corner of the screen.

[1] TRANSACTION ENTRY AND CLAIM MANAGEMENT

To enter transactions using Medisoft Advanced Version 12, click on the Transactions icon or pull down the activities menu and select enter transactions. Fill in the dialog box by selecting Joan Adam’s chart number, and then selecting the rest of the information from the drop-down list boxes. Fill in the payment information in the bottom part of the window. Remember to click the apply command button. Create and send the claim to her insurance.
Enter a new case for Miriam Cohen. On September 24, 2008, Miriam attempted to remove an air conditioner and suffered severe back spasms. She was given an emergency appointment with Dr. Malloy. Click on the office hours icon on the toolbar. Double-click the space next to 8:15a, and enter the following:
Close Office Hours. Click on Patient List icon or pull down the lists menu and select Patients/Guarantors and Cases. Click on Miriam Cohen and click the cases option button. Click new and indicate on the personal tab that Miriam is being seen for Back Spasms.

Click on the policy 1 tab fill in the information to indicate that Miriam has Blue Cross/Blue Shield insurance, her policy number is 3, her group number is 4, and her policy started on 2/5/2008. Miriam’s annual deductible is $750.

Click the account tab and make sure PM is listed as the provider. Click the diagnosis tab and select low back pain from the diagnosis 1 drop-down list. Click the condition tab and select Illness from the drop-down Illness Indicator list. Enter the first consultation date as 4/3/2009 and the dates unable to work as 4/3/2009 to 4/6/2009. Save your changes and close the patient list window.
To enter a transaction for Miriam Cohen, click on the Transaction icon or pull down the activities menu and choose enter transactions. Select Miriam Cohen’s chart number from the drop-down list; select the case for back spasm. Make sure the charge tab is selected. From the procedure drop-down list select Office Visit, Established Patient. The amount indicated as a charge should be $225.00. This amount should automatically be filled in once the correct procedure is selected and either the enter or tab key is pressed. After the charge has been entered, proceed to enter a cash payment from Miriam Cohen of $50.00 and apply the payment to the charge. Click Save Transaction.
Print a receipt for her by clicking the print receipt button.

Next, create a claim to be sent to her insurance company. Her insurance must be billed for the remainder of the payment. You can create a claim for her either from the transaction screen by clicking on print claim or from claim management. MediSoft will not allow the creation of duplicate claims. Click print claim, select paper as the billing method and click ok. Choose Laser HCFA (Primary) W/Form and start to preview the report on the screen. You will see the claim on
the screen. When you close out of this screen you will receive the message that one claim has
been created. If you need to edit the claim, highlight the claim in the claim management window
and click edit. You can check the status of your claims at the claim management window (pull
down the Activities menu and select Claim Management. The claim is ready to send.

You can change the status to sent by highlighting the claim, clicking on the Change Status button
and changing the status from Ready to Send to Sent. (In addition, you can change the status to
rejected, challenged, and so on).

Close the claim management window.
Next, assume for the purposes of this exercise that the $75.00 payment is received immediately from Blue Cross/Blue Shield. Apply it to Ms. Cohen’s account.

To enter the next case, you must first enter the diagnosis code for a routine health screen exam to your diagnosis list. Go to list, and select diagnosis code. In the diagnosis (new) window, enter the diagnosis code V70.0, and the description as exam routine health screen. Save this record.

Enter a new case for Karen Wang. Click on the personal tab of the new case dialog box, and fill in the description as General Health Screen Panel. Karen Wang is married and does not go to
school. On the diagnosis tab in the first drop-down list select exam routine health screen as the
default diagnosis 1. Click on the policy 1 tab and indicate that Karen Wang has CIGNA for
insurance. Her policy number is 6 and the group number is 7. Her policy started on 7/9/2007.

Now enter the transaction for Karen Wang’s appointment for an exam routine health screen for
which the charge is 45.00. Karen has insurance that pays 35.00. Create a claim for Karen Wang.
Assume for the purpose of this exercise that Cigna sends the 35.00 immediately. Apply the 35.00
to Ms. Wang’s account. The 10.00 is written off by the practice and is an adjustment to Karen’s
account.
Steps to Submitting Work

Depending on your instructor, as you go through this supplemental package you may be required to submit each figure as you work through each section. Instructions for printing your work are as follows:

1. Open Medisoft

2. Locate the screen/dialog box where you are entering information. Enter your information.

3. After you have entered the appropriate information hit the Print Screen button to capture the page.

4. Go to your start button on you Windows desktop. Find the program Windows Paint. (This program is typically located under Accessories).

5. Open Windows Paint.

6. Click the Edit on the tool bar. Then click on paste.

7. Then go to file and save as. Name the file as the figure number indicated in your supplemental package.

You can either e-mail these files to your instructor or print them off as required.