

The AcuBase Standard 2.000 HCFA Update

AcuBase Update New Features Overview

As many types of “alternative” medicine become mainstreamed in the new millennium, complementary medical practitioners will need to be more professional in all aspects of the management of their practice. And no practice management software would be complete or professionally viable if it did not include the ability to print the Health Care Finance Administrations’ (HCFA) 1500 insurance claim form for insurance billing. With this new update, now you, too, can print HCFA forms from AcuBase 2.000!

The AcuBase 2.000 HCFA update includes:

- Field names with the related HCFA line numbers for easy reference
- A “HCFA Details” screen that allows you to enter HCFA-specific data that you may not have otherwise included in AcuBase
- The choice between printing onto pre-printed, blank HCFA forms, and the ability to print a black and white copy of a HCFA directly from AcuBase
- The ability to adjust the alignment of the HCFA form in small increments to ensure that your printer places the fields appropriately onto the form
- The ability to change the diagnoses treated for any given treatment directly from the billing entry screen
- New reporting features, from patient statements to allow printing of all outstanding balances, to bulk printing of outstanding invoices onto superbills or HCFA forms
- Context-sensitive help available where and when you need it most

Using the HCFA Forms Features

These instructions will review the new features in the AcuBase upgrade. For questions related to pre-existing features of AcuBase, including Superbills, refer to the instructions that come with the program (on the AcuBase CD, in the “Instruct” or “Documentation” directory).

The HCFA forms features are located within the Patient Information and Billing portion of AcuBase 2.000. To get to Patient Information and Billing, click on the button of the same name from the Main Menu. You will note when the Patient Information database opens, it appears the same as it did before the update. You may also notice, however, that a few new fields have been added to each layout (click the “View as Form” button at the top of the screen, and view the Patient Information, General Medical Information, or Billing tabs). For instance, in the Patient Information Form View screen, under General Information / Notes, you will see new fields for “Patient’s Sex” and “ID of Referring Physician (HCFA Line 17a)”, both of which refer directly to lines on the HCFA form when printed.

When you click on the “Billing” tab, you will note at the bottom-left side of the screen that there are now 4 button choices: New Superbill; New HCFA; Align HCFA; and HCFA Details. If you do not need to bill insurance directly, or would like to bill the patient for herbs or other items or services not covered by insurance, click on New Superbill. If you do wish to create a HCFA, click on New HCFA (though you may also create a HCFA from a Superbill). You would click on HCFA Details to fill out the remainder of a given patient’s HCFA-required fields, and can choose how the HCFA form prints by clicking on Align HCFA.

The screenshot shows a software interface with a billing summary. At the top, there are four numerical values: 11/5/99, 55.00, 65.00, and -10.00. Below these are four buttons: 'New Superbill', 'New HCFA', 'Align HCFA', and 'HCFA Details'. To the right of these buttons, the text 'TOTAL BALANCE DUE (\$):' is displayed in bold, followed by the value '467.93' in red. A mouse cursor is pointing at the 'HCFA Details' button.

Importing Data / Running the New Program for The First Time

If you have already been using AcuBase Standard 2.000 for some time before this update, you probably have many patient records already entered into the database. In order to import those records into this update, you will need to do the following.

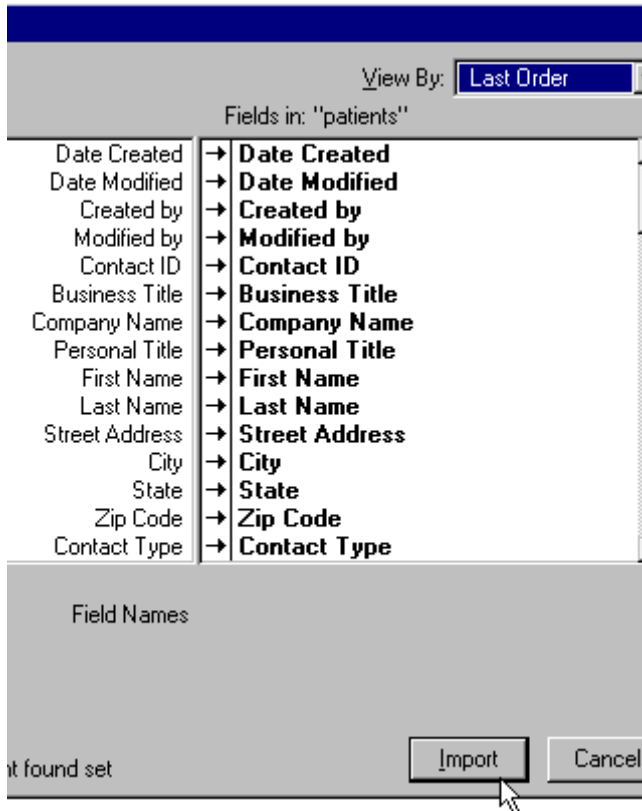
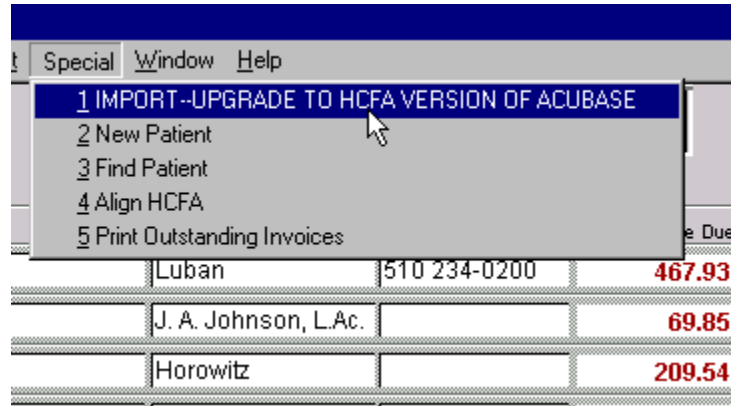
1. Immediately **before** updating your program, open AcuBase, and from the Main Menu, choose "Patient Information and Billing." Go to any given patient's record by clicking on "Form View" at the top of the screen, and then click on the "Billing" tab. View any one of the transactions on the list by clicking on the date next to it. This will take you to the "Superbill Entry" screen. From here, click on the "View As List" button at the top of the screen. From within the List View screen, click on "Find All." Now go to the File menu, and Quit / Exit AcuBase. This process assures that all patient records will be imported into the new, updated version.
2. Back up your existing data! Trigram Software is NOT responsible for any personal data loss, which is only one of many reasons you MUST back up your data. We recommend using a Zip drive to do this, which can usually handle the large disk space required. DO NOT attempt to back up onto floppy disks! To make a backup, simply copy the AcuBase directory / folder onto your backup media. (From a Windows-based PC, this folder will be in C:\program files\Trigram Software. From a Mac, there is an AcuBase folder on your hard drive or desktop.)
3. Once you are confident that you have a good backup, you will need to rename some files. (PC users who have AcuBase installed onto their C:\ drive may simply double-click on the "Upgrade" file included in your AcuBase update. You can then skip this step and Step #4.)

To rename the files, go into the AcuBase folder (do NOT open the program!), and rename the "Billing.tcm" file "Billing2.tcm"; the "Patinfo.tcm" file to "Patinfo2.tcm"; and the "Patients.tcm" file to "Patients2.tcm". (Mac users note: these files may not have the *.tcm extension on them.) These files MUST be named as stated above (Billing2, Patinfo2, and Patients2). If they are not named correctly, or are misspelled, the import process will not work!

4. (Windows-based PC users who have run the "Update" file do not need to do this step.) Copy the downloaded files titled "Billing," "PatInfo," and "Patients" into the AcuBase on your hard drive (see #2 above to locate this directory). (If you get the message that you are about to replace existing files, repeat Step #3. Once you have renamed the original files (as in Step #3), you should not be getting this message.)
5. Once you have copied the files over, run AcuBase Standard 2.000 the way you always do. From the Main Menu, click on "Patient Information and Billing."

- From the Patient Information screen, you will now import your old data. Go up to the "Special" menu at the top of the screen, and select "IMPORT—UPGRADE TO HCFA VERSION OF ACUBASE."

This begins the import process.



7. After a couple of introductory message screens, you will see a series of 3 -6 import screens. DO NOT CHANGE ANYTHING ON THESE SCREENS! Simply click on the default "Import" and/or "OK" buttons all the way through. If you get errors during the import, such as "File Not Found," this means that you did not rename the files correctly. Click on the Cancel buttons all the way through and repeat steps 3 – 7.

8. Once the import has been completed, you are ready to roll. You may want to do another backup at this point before proceeding.

Creating A New HCFA Form Entry

To create a new HCFA entry, go to the Billing tab within the Patient Information and Billing database for any given patient. To start a new HCFA form...

1. Click on the "New HCFA" button at the bottom of the Billing Information screen (Billing Tab). This will take you to a new screen which allows you to enter data for the current treatment(s).

The screenshot shows a software interface with two buttons on the left: "New HCFA" and "HCFA Details". To the right of these buttons, the text "TOTAL BALANCE DUE (\$):" is followed by the value "467.93" in red.

2. Note that the diagnoses which you already entered in the General Medical Information tab for this patient already appear. If you wish to change them, simply click on the Description field for any one of the four possible diagnoses. (Four is the maximum number allowed on a HCFA

Enter Data For HCFA 1500 Form Below

50013		Daniel	Quayle	1042	10/27/99	Balance Due
ID	Title	First Name	Last Name	Invoice #	Billing Date	Status

DIAGNOSES (HCFA Line 21 -- Related to "Diag" below by number [1 - 4]):

	ICD Code	Description	ICD Code	Description
1:	789.0	Abdominal Pain	3:	723.3 Cervicobrachial Syndrome
2:	840.0	Acromioclavicular Sprain	4:	346.9 Migrane Headaches

PROCEDURES (HCFA Lines 24 a - k):

Dates (From -- To)	Place	Type	Procedures & CPT Codes	Diag.	Price	Units	Local Use
10/12/2000	11	7	Acupuncture 97780	1	55.00	1	ACB124
10/12/2000	11	7	Cold packs 97010		20.00		
			Acupuncture				
			Acupuncture CA Worker's Comp				
			Cold packs				
			Cupping CA Worker's Comp				
			Detailed/low complexity Examination (30 minutes)				
			Electroacupuncture				79.54
			Electroacupuncture CA Worker's Comp				
			Extensive examination				
			Heat				
			Low to moderate severity (15 minutes)				

- Adjustment:

View HCFA Details for This Patient

TOTAL DUE THIS INVOICE: 79.54

form, Line 21 on the HCFA form.). If the diagnosis you are looking for does not appear on the list, double-click on the Description field to enter your own diagnosis and give it a unique ICD Code.

3. Next, you may fill out up to six procedures (acupuncture, cupping, etc.). This part of the entry screen is designed to emulate the look and feel of Lines 24 a-k on the HCFA itself. Fill out the dates of service, Place and Type codes. When you click on the “Procedures” field, you will see a pop-up list of procedures from the Preferences in the AcuBase Main Menu. Choose the procedure you would like to bill for, and the appropriate CPT code will automatically be placed into the CPT field. If the procedure you are looking for does not appear on the list, double-click on the Procedure field to enter your own and give it the appropriate code and price, and/or enter in the Main Menu Preferences in the future. Per HCFA regulations, you may bill for up to 6 procedures on one form.
4. If/when the patient or insurance company has paid for this treatment, enter the amount paid in the Payment field, and adjustments to their balance you made in the “Adjustment” field.
5. When you next return to the Patient Info screen and click on the Billing tab for this patient in the Patient Billing Record list. You may click on the button to the left of any transaction to view or edit that transaction.
 - To enter other HCFA-specific data for this patient, click on the “View HCFA Details for This Patient” button at the bottom-left side of the screen. (See instructions below.)
 - To print the HCFA, simply click on the Print HCFA button at the top of the screen. Be sure you have aligned the HCFA properly for your printer, as well (see “Align HCFA”).
 - If you wish to enter herbs for a Superbill, as well, you may click on the “Superbill Entry” button at the top of the screen. (Superbill instructions are on the AcuBase CD.)
 - Click on the “Help” button if you have problems or questions on any screen. Click on the “Return to Patient Info” button to exit the HCFA Entry screen.

Creating HCFAs from Superbills and Vice-Versa

If you upgraded from a previous iteration of AcuBase or otherwise wish to create a HCFA from a previous Superbill (or vice-versa), it’s easy.

1. Return to the transaction for which you would like to print a HCFA or Superbill (see “Editing or Viewing a Past Transaction,” below). This takes you to the Superbill Entry screen for this transaction.

- If you wish to print a HCFA for this transaction, simply click on the “HCFA Entry” button at the top of the Superbill Entry screen and then fill out the appropriate fields. Be sure that all HCFA details are filled out for this patient, as well (see “Entering Other HCFA-Specific Data,” below). Click on the “Print HCFA” button at the top of the screen when you are ready.
 - If you wish to create a Superbill from an existing HCFA, repeat #1 above, and fill out all appropriate fields, clicking on the “Print Superbill” button when ready.
2. Return to the Patient Information screen by clicking on the “Return to Patient Info” button.

Editing or Viewing a Past Transaction

After creating a HCFA transaction, you may wish to return to that transaction to made edits, to delete it, or to apply payments. To do so,

1. Go to the Billing tab within the Patient Information database. This will take you to the Billing Information screen.

Patient Billing Record				
Invoice Date	Total Cost	Payment	Adjustment	Ending Balance
9/9/97	59.54	125.00		-65.46
7/29/99	75.00	75.00		0.00
11/5/99	55.00			55.00
11/6/99	55.00			55.00
2/13/2000	55.00			55.00
2/13/2000	55.00			55.00
4/9/2000	55.00			55.00
TOTAL BALANCE DUE (\$):				209.54

2. Choose the transaction you wish to view by clicking on the button to the left of the transaction date in the list of transactions. This will bring up the transaction in a Superbill window.
3. You may make adjustments here, or click on the “HCFA Entry” button at the top of the screen to view HCFA-specific data.
4. Click on the “Return to Patient Info” button to close this window, or print the HCFA or Superbill out by going to the appropriate button at the top of the screen.


Entering Other HCFA-Specific Data

There are many (MANY) fields which must be filled on the average HCFA form. Aside from the obvious (name, address, diagnoses, procedures), there are also many less obvious (Plan Type, Patient's Relationship to Insured, etc.). In order to fill out the less obvious fields, which we call "HCFA Details" for a given patient, you must click on the "HCFA Details" button. This button may be found on the bottom-left side of the Billing screen (Billing tab in the Patient Information database), or at the bottom-left side of any HCFA Entry screen. These fields only need to be filled out once per patient, and may be changed at any time.

To enter HCFA details for a given patient,

1. For each patient, click on the "HCFA Details" button on the bottom-left side of the Billing screen of the Patient Information database. This will open the "HCFA 1500 Form Preferences Screen."
2. Simply tab through each field, filling them out appropriate for a given patient. Note that most fields will also refer to a given line or lines on the HCFA itself. Note that you only need to fill these fields ONCE for each patient in the database, and only for those for whom you will be printing HCFA forms. If you will only be printing Superbills for a given patient, you will not need to fill out the fields on this screen.

HCFA 1500 Preferences For This Patient



The fields below refer directly to fields on the HCFA 1500 Form used for U.S. insurance billing. Many of the fields below must be filled in if you wish to print invoices for this patient on a HCFA form. Click on a tab above to return to a different layout

Plan Type (HCFA Line 1)
 MEDICARE MEDICAID CHAMPUS GROUP HEALTH PLAN FECA OTHER

Patient Relationship to Insured (HCFA Line 6) **Patient Status (HCFA Line 8)**
 Self Spouse Child Other Single Married Other
 Employed Full-Time Student Part-Time Student

Insured's Information (HCFA Lines 1a, 4, 7, and 11 a - d)
 NOTE: Fill these fields in only if the insured person is different from the person receiving treatment

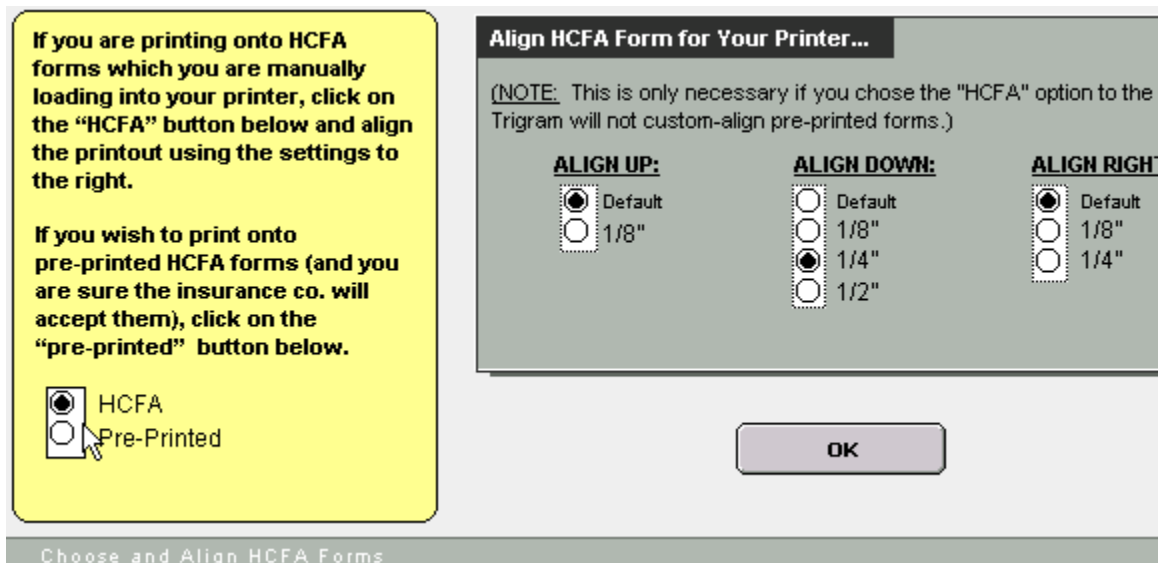
Insured's ID (HCFA Line 1a) <input type="text"/>	Insured's Name (HCFA Line 4) (Last Name, First, Middle Initial) <input type="text"/>
Insured's Policy Group or FECA Number (HCFA Line 11) <input type="text"/>	Insured's Address (HCFA Line 7) <input type="text"/>
Insured's Date of Birth, Sex (HCFA Line 11a) <input type="text"/> <input type="radio"/> M <input type="radio"/> F	City, State, Zip Code <input type="text"/>
Insured's Employer or School Name (HCFA Line 11b) <input type="text"/>	Phone <input type="text"/>
Insurance Plan Name or Program Name (HCFA Line 11c) <input type="text"/>	

3. Click on the "Billing" tab or "Return to Billing" buttons to exit this screen.

Aligning the HCFA Form for Your Printer

AcuBase gives you two options for HCFA printing. The first is to print a pre-printed HCFA directly onto the printer from the computer. The second, and most accepted by insurance companies, is to print the data from the computer onto a blank HCFA form which you place in your printer. Because every printer is different in the way that it aligns forms, we have provided several options to get your forms printing into the correct fields properly. To align the forms properly, print a HCFA form from the computer, and measure how far to off the print job may be (whether or not the fields print within the appropriate boxes). If they do not...

1. Click on the Align HCFA button on the bottom-left side of the Billing screen of the Patient Information database. This will open the HCFA format and alignment screen.



If you are printing onto HCFA forms which you are manually loading into your printer, click on the "HCFA" button below and align the printout using the settings to the right.

If you wish to print onto pre-printed HCFA forms (and you are sure the insurance co. will accept them), click on the "pre-printed" button below.

HCFA
 Pre-Printed

Align HCFA Form for Your Printer...

(NOTE: This is only necessary if you chose the "HCFA" option to the Trigram will not custom-align pre-printed forms.)

ALIGN UP:	ALIGN DOWN:	ALIGN RIGHT:
<input checked="" type="radio"/> Default	<input type="radio"/> Default	<input checked="" type="radio"/> Default
<input type="radio"/> 1/8"	<input type="radio"/> 1/8"	<input type="radio"/> 1/8"
	<input checked="" type="radio"/> 1/4"	<input type="radio"/> 1/4"
	<input type="radio"/> 1/2"	<input type="radio"/> 1/4"

OK

Choose and Align HCFA Forms

2. On the left side of the screen, choose whether you wish to print onto a blank HCFA form in your printer (HCFA), or do a pre-printed one (Pre-Printed). If you choose to print onto a blank form, you may choose the alignment options to the right at any time, as necessary, to adjust for your particular printer. (If, upon adjusting these settings, you are still unable to print into the fields of the HCFA properly, contact Trigram Software at support@trigram.com to arrange for a custom printer alignment.)
3. Once you have chosen your HCFA printing method, and have aligned the forms for your printer, you only need to visit this screen if you get a new printer. The settings made on this screen are static until you change them.

New Reporting Features in this Update

There are two significant reporting features in this AcuBase update. The first allows you to print general statements patient-by-patient, so that you may batch print all statements at once, and send them out to your patients. The other new feature is a new report which allows batch printing of Superbills or HCFA forms.

To print Patient Statements,

1. From the AcuBase Main Menu, click on "Patient Information and Billing." This takes you to the Patient Information database.
2. From within Patient Information, click on the "Reports" button at the top of the screen. This will take you to the Reporting window.
3. Click on the "Summary Patient Balances" report.
 - The first screen will ask you to title the reports / statements. This title will be on the top of each statement. Click "Continue" when ready.
 - The next screen asks you to find any specific records you would like. If you wish to print only statements for specific individuals, you may type one at a time in here by name. If you wish to print out all patients with outstanding balances, type ">0" in the "Total Due" field. Click the "Find" button when ready.
 - You will see a preview of your report. Click "Continue" on the left side of the screen when ready, and print the report. When you get the "Print" screen, be sure that it does not say "Current Record" at the top, but rather "Records being browsed," and that Print Range is set to "All."

To batch print Outstanding Invoices,

1. From the AcuBase Main Menu, click on "Patient Information and Billing." This takes you to the Patient Information database.
2. From within Patient Information, click on the "Reports" button at the top of the screen. This will take you to the Reporting window.
3. Click on the "Print Outstanding Invoices" report.
 - The first screen will ask you whether you would like to print onto Superbills or HCFA forms. Make your selection and click "Continue."

- The next screen asks you to find any specific records you would like. If you wish to print only statements for specific individuals, you may type one at a time in here by name. If you wish to print out all patients with outstanding balances, type ">0" in the "Total Due" field. Click the "Find" button when ready.
- When you get the "Print" screen, be sure that it does not say "Current Record" at the top, but rather "Records being browsed," and that Print Range is set to "All." If you are printing HCFA forms, be sure you have selected and set your printer up properly (see "Aligning the HCFA Form for Your Printer," above).

Technical Support

For any AcuBase questions or problems, start by checking the Trigram Software web site at <http://www.trigram.com>. This HCFA form update is optional, and only relevant in the United States. Support for this upgrade does not fall within the 3 hours of free support which comes with AcuBase Standard 2.000. If you experience critical errors in your program, please e-mail the details to support@trigram.com. If you have questions about HCFA billing or the functionality of the program, technical support may be reached at (510) 654-3268 Monday through Friday, 9:00 a.m. to 5:00 p.m. U.S. Pacific Time. The minimum charge for support is \$15 for the first ten minutes and \$1.50 for each minute thereafter on your Visa or MasterCard. Per-hour support is also available at \$75 / hour.