AcuBase Pro

User's Guide

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Chapter 1: Installation of AcuBase Pro

Hardware & Software Requirements

To run AcuBase Pro, you need the following minimum hardware and software:

http://help.filemaker.com/app/answers/detail/a_id/10012/~/system-requirements-for-filemaker-pro-12-and-filemaker-pro-12-advanced

For information on where and how to purchase FileMaker Pro, go to **http://www.filemaker.com.**

If you wish to run AcuBase Pro on a network for more than 10 users, please contact Trigram Software for more detailed information on server setup and other considerations.

Running the installation

Apple Macintosh (including OS X)

To install and run AcuBase on a Macintosh that meets the above minimum requirements, simply download and unzip the file, and click the application file (top file when viewing as a list). Drag the file to your dock and open from there.

Microsoft Windows

To install and run AcuBase on a Windows-based machine that meets the above minimum requirements, do the following:

1. Extract the file.
2. If you get a Confirm File Replace pop-up box, click **Yes** to **All**.
3. Once unzipped, you will see a window with the installer purple box with red arrow.
4. Agree to the License terms and Click **Next**
5. Double-click on the installer
6. Open the file- a Security Warning box will pop up- uncheck the box next to **Always ask before opening this file** and click **Run**.
7. Click **next** on all following windows.
8. When the AcuBase Pro + 12 Install Program window pops-up, click **Yes** to the prompt and then **Start**.
9. When installed, you will see an AcuBase Pro+ 12 folder on your desktop and a shortcut to the .exe file (fuchsia/black open folder). This is the file to click on to open the system.

Network Installations (Mac or PC)

Please contact support for Network installation.

Uninstalling AcuBase Pro

- To uninstall AcuBase Pro on a Macintosh, simply drag the AcuBase folder to the trash.
- To uninstall in Windows, go to the Control Panels, Add/Remove Programs, and remove AcuBase Pro. You may also remove the program from its default-installed directory at C:\program files\trigramsoftware\AcuBasePro.
- For networked versions, make sure the program is closed on the Host computer, go to wherever you installed the program, and delete it.

Important Notes

- Always close AcuBase Pro before shutting down your computer. Since AcuBase Pro saves as you go, it may not have saved all of your data if the computer is shut down while the program is open. In most cases, the next time AcuBase Pro is opened, it will recover whatever data was in the database the last time it was opened.
- Do not move or rename any AcuBase Pro-related files. AcuBase recognizes its files only in their original form as they were installed from the CD, and will not work properly if any file names or file locations are changed.

The Log File

Within the AcuBase Pro folder on your computer is a Log File. The Health Insurance Portability and Accountability Act of 1996 (HIPAA) requires that billing and practice management software have controls over who can use and view health-related data, as well as auditing what changes have been made to the data and by whom. AcuBase does this in the Patients section by requiring users to click on an “Edit” button, which allows access to edit fields, but also writes changes to a log file that can be reviewed at any time. The Log File keeps track of changes made to the Patient data in the program, and those changes can be viewed in detail by opening (double-clicking) on the Log File. You may wish to back up this file every so often (say, once a month) and delete all records within it so that the file does not get too large.

Recovering Damaged Files

Power failures, hardware problems, shutting down your computer before quitting out of AcuBase Pro, and other factors can damage the AcuBase Pro database files. If AcuBase Pro becomes damaged, a dialog box will appear telling you to contact the AcuBase Pro developer. Once you know that a file is damaged, you will likely need to email the damaged AcuBase Pro file to us here at Trigram software. Email it to **support@trigram.com**, with “Damaged File” in the subject line.

NOTE: Always close AcuBase Pro before shutting down your computer. Since AcuBase Pro saves as you go, it may not have saved all of your data if the computer is shut down while the program is open. In most cases, the next time AcuBase Pro is opened, it will recover whatever data was in the database the last time it was opened.

Upgrades and Fixes

The makers of AcuBase Pro welcome your comments when you find bugs in our program and/or if you feel that there are features that you might like to see included in a future release of the program. Please e-mail suggestions to **mailto:support@trigram.com**.

When bugs are found, or when we upgrade a file or add a new feature, the new or fixed file may be found and downloaded from the Trigram Software web site at **www.trigram.com**.

Backing Up Your Files

The makers of AcuBase Pro **ARE NOT RESPONSIBLE FOR DATA LOST WHEN NO RECENT BACKUP HAS BEEN MADE.**

It is *essential* that you keep a backup of all files related to AcuBase, as well as any and all other mission-critical files that you use. This is your responsibility as a businessperson and a prudent computer user.

AcuBase Pro comes with an automated backup feature which allows users to set how frequently, if ever, the program backs up.

Click on the text in the Settings, General, Backup section of the program to back up the file.

Backups are also an option each time you close the program. We recommend a backup at the end of every significant use of the program.

Backups are automatically saved into the Backup folder, which is within the AcuBase Pro folder on your computer's hard drive. We recommend that you further back up the whole AcuBase Pro folder onto a CD, Zip disk, or some other removable media so that, if something goes wrong with your computer, you can always load the backed-up program onto another machine without losing data. We recommend using a separate disk for every day of the week. Any other media that may provide reliable backup of at least 100 megabytes of data and is easy to restore in case of data loss may also be employed. Note that backing up to a CD makes the AcuBase Pro files read-only. If you need to recover lost data from a backup on CD, you may need to select all of the files after you've moved them to your hard drive, and then un-select the "Read-Only" designation in order to make your files modifiable.

Simply backing up the AcuBase Pro folder/directory (with the program CLOSED) will save all data related to the program. Mac users, copy the AcuBase Pro folder from your hard drive to your backup media. PC users, back up the AcuBase directory, located at C:\program files\trigram software\AcuBase (where “C:” equals the letter of your hard drive).

Moving AcuBase Pro to a Different Machine

Your software license permits you to install and use one copy of the program on one machine only. Situations will arise where you may buy a new machine or wish to simply move the program over to a different computer. Whether on a PC or a Macintosh (or between the two), you may move your software from one computer to another by doing the following:

1. Make a full backup of the AcuBase Pro directory / folder on your original computer (the one you wish to move data *from*) per the backup instructions above. Put the backup onto a Zip drive, CD, or other media.

2. Install AcuBase Pro from the our download page (the one you wish to move data *to*) per the installation instructions above.

3. Copy the contents of your backup file (all of files in the AcuBase Pro directory / folder on your backup media) into the newly-installed AcuBase Pro directory on the newer computer, replacing existing files. (PC users, your files will be located at C:\Program Files\TrigramSoftware\AcuBase Pro by default, where “C:” equals the letter of your hard drive). Again, you will copy all of the files *inside* of the AcuBase Pro folder that you backed up *into* the newly installed AcuBase Pro folder on the new machine. Simply copying the backed-up AcuBase Pro folder and pasting it inside of the newly installed AcuBase Pro

Registering Your Software

In order to use this version of AcuBase Pro, you were required to register with us. It is important that you register your copy of AcuBase Pro as soon as you receive the program so that you may get support and upgrades as they come out. If you are unsure that you are registered, you may register by e-mailing your name, address, phone number, date of purchase, and vendor name (from whom you obtained AcuBase Pro) to **support@trigram.com**.

Further Help

Most AcuBase Pro help is available through the program itself by using the “help” buttons located on almost every screen and in this manual. You may also wish to check the Trigram Software support page at **http://www.trigram.com/support**, or contact Trigram Software Monday through Friday from 9 AM to 5 PM US Pacific Time. Phone

U.S. toll-free 1-888-4ACUBASE (888-422-8227), or e-mail us at **support@trigram.com**.

Please note that:

- Technical support does not include help related to how to do your billing, i.e., which codes are appropriate to use, how many procedures to bill, etc.

- If you choose to use a password and later forget it and/or get locked out of the program for any reason, Trigram Software will charge you a fee to unlock your program and reset the password.

- Trigram Software support will NOT assist you in the event that you attempt to change default layouts and/or lose data after modifying the databases in FileMaker. If you decide to modify these files, it is assumed that you know and understand the intricacies of FileMaker, and you do so at your own risk.

- If you are using electronic billing features and have any issues related to the billing clearinghouse's reporting or claims submission processes, these issues should be handled by the clearinghouse directly.

- If you are using a networked version of AcuBase Pro, we will not be responsible for the function or repair of your network infrastructure, and/or getting your program to broadcast over a network if you have not already established that the network is otherwise functional.

Chapter 2: Getting Started with AcuBase Pro

About AcuBase

AcuBase Pro was developed by a team of programmers from Trigram Software, most of whom are also intimately involved in various medical modalities. The first version of AcuBase was developed in 1996 for use by students and clinicians of traditional Oriental medicine. It included reference materials on herbal medicine, acupuncture, and preparation tools for those interested in sitting for the national board exams in these subjects. We have since been through over a dozen new versions, and added practice management and billing features made to work for any medical practice.

Trigram now serves practitioners in all major areas of medicine, both “mainstream” and “alternative.” In this, the latest version of our practice management solution, we wanted to develop new tools for the everyday practitioner, that are at once practical and not overly complicated, and to continue to offer all of it at a bargain price.

Most of the newest features available in this version were suggested by existing users whose comments over the years have made our program what it is today. We welcome all comments and suggestions! If you have anything to suggest upon using the program, please forward your comments to **support@trigram.com**.

Getting Around in AcuBase Pro

AcuBase has been designed to have a consistent, intuitive interface throughout such that you may easily jump to the most relevant parts of the program at any time, from any other part of the program. The top of all screens have the same general navigational layout, including:

- Five main topic tabs: **Patients**, **Invoices**, **Reports**, **Inventory,** and **Calendar**. These tabs represent the main subject areas of the program, and each is given its own chapter in this User’s Manual.

- Back and Forward buttons at the top-right part of each screen will all you to move back and forward through previously-viewed screens.

Note that Back and Forward buttons cannot go back or forward to records that have been deleted, or to re- or un-sort records the way they may have previously been sorted, nor are they active on Edit-only screens for reasons having to do with HIPAA compliance.

- The **Settings** button (which looks like a wrench in the upper-right hand side of most screens) will take you directly to the program **Preferences**. The Settings section of AcuBase Pro is the central repository of your preferences for the way your practice interacts with the many different functions of the program. We recommend that you fill in as many of the Settings options as possible for your practice before you begin using the rest of the program, as options set up in Settings cascade down through all aspects of AcuBase Pro.

- A “?” button is available at the top of every screen. This help button takes you to context-sensitive help for whichever screen you are looking at.

- Two square buttons to the right of the Calendar tab represent **View as Form** and **View as List**, respectively. Clicking on these buttons from a given layout in the program will take you to a more specific or more general view of the information in the given area of the database you are currently viewing.

- Fields, buttons, or other text in green usually indicates something that may be clicked upon for more action. For instance, the green “@” symbol next to an email address field will send an email to that address; the “re-login” at the bottom of each screen allows one to change which user is currently logged in.

In the following chapters, we will document the many different functions and ways of using AcuBase Pro. While each portion of the program is unique in its own way, the fact that the entire program was developed from within FileMaker means that several basic rules apply to the use of the program. What follows are how-to’s about some of the most basic functions of AcuBase Pro.

Menus Vs. Buttons

AcuBase was created in FileMaker Pro 12. As a result, users have access to many of the menu items at the top of the screen that FileMaker provides.

We highly recommend that AcuBase Pro users stick to the buttons at the top of each screen which have been provided. While you may add a new record, for instance, from the File menu, the New Record button has scripts that make sure that the integrity of the database is kept consistent.

The one exception to this suggestion is the **Commands** menu. The Commands menu has a list of commands for which keyboard shortcuts may be used. These shortcuts, once learned, may provide faster navigation through the program without the necessity of using the mouse.

Entering Data

- Type the data directly into a field, or
- Select the data from a value list if the field is formatted to display values with a pop-up list, pop-up menu, check boxes, or radio buttons.

*NOTE that, in the Patients section of the program, you will need to click on the **Edit** button in order to edit patient records. This allows AcuBaset to keep an accurate log file of changes to the program, per HIPAA* *regulations*.

To Move to a Field

- Click in the field where you want to enter data.
- Press Tab to move to the next field in the tab order.
- Press Shift+Tab to move to the previous field in the tab order.

To Move to a Record

- Press Command+Tab on the Macintosh or Ctrl+Down Arrow on the PC to move to the next record or click on the “Next” record button for a given screen.
- Press Shift+Command+Tab on the Macintosh or Ctrl+Up Arrow onthe PC to move to the previous record or click on the “Previous” record button for a given screen.
- Use the Status Area on the left side of a given screen to navigate through records. The icon that looks like a book at the top-left side of the screen can be used to move back and forth through records, as well as the bar below it.

To Save Data

- AcuBase Pro saves as you go, so there is never any need to click a “save” button.

To Add Records

- To add a new record, choose the New Record button on any given screen.

To Delete Records

BE ADVISED! When you delete a record, you are permanently discarding the data you entered in all the fields in that record! **THERE IS NO WAY TO BRING BACK DELETED RECORDS UNLESS YOU HAVE MADE A BACKUP OF THE FILE.**

You may delete any single record by simply clicking on the “Delete” button. You can also delete a group of records, or all of the records in a file.

To delete a record:

1. Select the record you want to delete by bringing it into view on your screen.
2. Click on the Delete Record button.
3. In the message that appears, click Delete.

To delete a group of records:
1. Perform a Find (see below) to select the group of records you would like to delete.
2. Choose Delete All from the Records menu.
3. In the message that appears, click Delete.

To delete a whole line from a list:
If you wish to delete a whole line from any of the lists in the program:
1. Go to the line you wish to delete, and look for the trash icon (Delete) at the beginning or end of a line to delete that line.
2. In the message that appears, confirm that you wish to Delete.

To Find Records

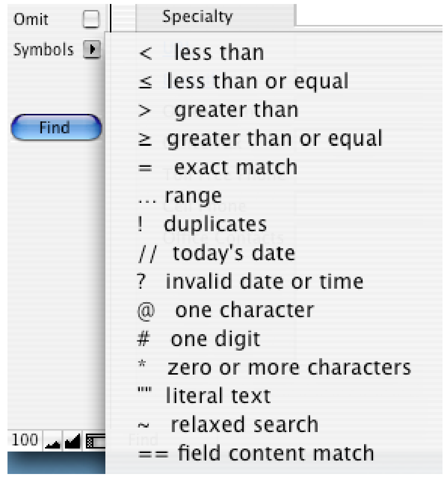
Finding records, sometimes also called a "query", is not limited in this system. You can search the contents of any field or related record. The more you practice finding records the more intuitive it will become when you need to perform complex finds. There are three main types of finds using FileMaker Pro; New set, Constrained set, and Extended Set.

To find a record or set of records:
1. Go to the layout you want to use to find records.
2. Choose the Search button at the top of the screen.
3. You see a blank find request that looks like a record without data.
4. Type values in the appropriate fields.
5. Click the Find button on the left side of your screen.

By searching for data in more than one field you are performing an "**AND**" search criteria. For example First Name = "John" AND Last Name = "Smith". This will return only records that have your criteria in **both** fields.

Special Search Symbols can be used to enhance your search criteria.
While in Find mode place your cursor in a field. Then select the Symbols button on the left side of the screen and choose a symbol from the list.

For example: to search by a date range enter the starting date, choose "…range", then enter the ending date (i.e. 12/1/2004…12/31/2004).



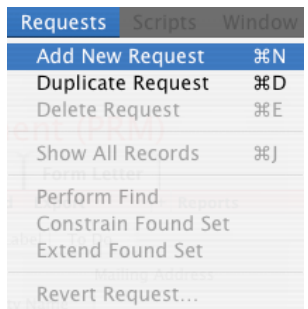
To find values that are	**Use this operator**	**Example**
Less than what you type	<	<40 or <09/09/1995
Less than or equal to	≤	<rrr or <05:00:00
Greater than what you type	>	>9519 or 10/10/1996
Greater than or equal to	≥	>baa or >8:00
An exact match	=	=Market finds Market, Market Services, and Ongoing Market
Within the range you specify	…	1/1/07…12/31/07
Duplicate values	!	! or !Smith
Today's date	//	//
Invalid dates or times	?	?
One unknown or variable text	@	@on
Digits in a text field	#	# finds 3 but not 30; ## finds 23, not 230
Zero or more unknown or variable	*	jo*n finds jon and John
Literal text in a field	" "	"Jean-Louis"
Exact matches of specific text	= =	= =John finds John but not John Smith = =John Smith finds John Smith but not Smith, John or John Smithers
Empty fields (for example, records w/o email addresses)	= =	= =

A special note on the * operator and finding for dates: The best and easiest way to find all records for a given month or year is to find with the *. For instance, if you wish to create a happy birthday letter and find for all people born in the month of September, you would go to Find mode and, in the DOB (Date of Birth) field, put "9/*/*".

Find All will show all the records in the table.

Omit will allow you to omit one or more records from the found set. To exclude records from a request, enter the values you want to exclude from within find mode (as if you wanted to find them), and then check the “omit” checkbox on the left side of the screen before clicking on the “Find” button on the left side of the screen. Omitted records are not deleted. They are temporarily removed from the found set.

To create an “**OR**” search criteria choose Requests>Add New Request to create a second find record. In the first record type “John” in the First Name field. Then navigate to the second record and type “Smith” in the Last Name field. This will find any records that have **either** John **or** Smith.



Replacing Data in All Records

There may come a time when you wish to change a given field in a part of AcuBase Pro and have that change be identical throughout all of your records. For instance, you may wish to change all patients from one provider to another. To do this:

1. Do a find for all of the records for which you wish to replace the data in a given field. In the example above, you may wish to find all patients who have “Dr. X” as their provider.

2. Go to the field you wish to replace the data in, and replace the data that is already in there with the changed data. In the example, we would change one of the patient records’ provider from the old, “Dr. X,” to the new data, “Dr. Y.”

3. Once the data is changed, make sure your cursor is still in the field you wanted changed, and go to the Records menu, Replace Field Contents. You may also hold down the “Cntrl” and “=” keys (the Cntrl key and the “equals” key on your keyboard. Mac users, “Command/Apple” and “=”.) You will see a dialog box that asks you if you would like to change the data in all of the other current records to match the data in this record. Choose “Yes” and you have done it.

Note that, once the change has been made, it is immediately saved and cannot be undone unless you go through the same process again (rereplacing the data with your pre-existing data for that field), or recover from your last good backup.

The “Show All” Button

Once you have completed a Find/Search, you are left with only the records in your found set. In order to bring all of the records back into the database you are looking at, click on the **Show All** button on top of whatever screen you are looking at.

To Change Printer Settings

AcuBase Pro reports are generally set up to print on U.S. standard 8.5" x 11" paper, Avery labels, and #10 envelopes.

To change these settings:

1. Click on the report that you would like to print and view it in **Preview** mode.

2. Go to the **File** menu and select **Print Setup**

3. Change your page setup to whichever standard you would like to use (different page size, letter size, landscape vs. portrait view, etc.) and click **OK**

4. View the new settings in **Preview** mode before printing.

NOTE: If you wish to use a page setup that differs from the AcuBase Pro standard for any given report, you will need to go through these steps each time you print.

New Windows

An exciting new aspect of AcuBase Pro is that you can have as many different windows open simultaneously as you like. So, for instance, if you wanted to look at the Calendar, and then look at a patient record without closing the Calendar, you can do that. If you are looking at a patient record and wish to look at another patient record without losing the first, you can do that as well. This feature is called New Window, and it is as simple as going to the Window menu, and choosing “New Window”. A new window will open over whichever one you were already viewing, exactly as you were viewing it. You may then move to wherever you wish in the program, and can close the current window, or go back to the Window menu and choose the other window you wish to return to.

Note that the Back / FWD button functionality may be challenged with multiple windows open.

Getting Help

To get help from any screen, simply click on the “**?**” button at the top-right side of that screen.

Quitting Out of AcuBase Pro

To get out of AcuBase Pro completely from anywhere in the program, simply click on the File menu and select **Exit** or **Quit**.

Chapter 3: Setting Your Preferences

The Settings section of AcuBase Pro is the central repository of your preferences for the way your practice interacts with the many different functions of the program. We refer to it variously as both Preferences and Settings. We recommend that you fill in as many of the Settings options as possible for your practice before you begin using the rest of the program, as a set up in Settings cascade down through all aspects of AcuBase Pro.

The Tool Wrench 

The Tool Wrench is located in the upper right corner of the screen, next to the **?.** When you click on it, you will notice several tabs across the screen.

It is crucial that you take the time to set up your preferences and settings within the **Tool Wrench** before setting up your patients. Once you are actively using AcuBase Pro, you may always return to The Tool Wrench from any screen.

From within Settings, click on the appropriate tabs to get to that specific setting section.

The Company Tab

Company Settings

Upon clicking the Tool Wrench, it will open the Company Tab. Enter your company information on the left side of the page- this info will reflect at the top left of your SuperBills.

Provider Setup

An unlimited number of providers/practitioners may be kept in AcuBase Pro. Once you have added providers, their names will show up on the provider list, and you may click on the name to see or edit details related to that provider. Each patient is assigned a provider, and provider information entered here in the Providers Setup filters down into related invoices and reports. Click on the **New Provider** button to add new Provider.

The Tax ID Number field refers to the type of ID number being used (Social Security No. or EIN number), and the type should be identified using the ID Type field. This field also determines which box is checked on Line 25 of the HCFA 1500 form. The ID Number fields and NPI (National Provider Identifier) are new fields that refer to lines on the new CMS 1500 form.

Important Note: Be sure that you have entered provider information here before you begin entering patient information. One of the first things you will enter in a patient record is the provider assigned to that patient. If the provider preferences were not entered before the patient was put into the database, provider information will not show up in box 33 of the CMS 1500 form. You will have to go back and reassign the correct provider to each patient in the database to fix this.

The General Settings Tab

Starting Point…

AcuBase Pro continues to open to this splash screen until you specify which tab it should open to. Outside of the first-time open splash screen, you may choose to have the program open to the Patients, Calendar, or Invoices tab.

Account Management

This is where you may manage all aspects of role-based user names and passwords. “Role-based” means that different users will have varying levels of access to different parts of the program based upon their security clearance. Most Account Management functions assume that the user has sufficient rights as Manager to execute them.

Note that many of the following account management activities (adding, deleting, activating, deactivating, resetting) require the user to be logged in as Manager to have sufficient rights to do them. The Manager login is for account management only, and will not allow the Manager to anything else in AcuBase Pro. To change Account Management functions, click on the function from the list and click on the “Manage” button.

Add Account

Click on **Add Account** and the **Manage** button to add new accounts to AcuBase Pro. You will be given a new window with three fields.

The first field is a pop-up list of existing accounts. Go to the bottom of the list and choose **Edit** to add the new account name to the list. Then click **OK** and choose the new account name from the list.

Next, go to the **Privilege Set** field to set the level of access for this new user. Each of the levels of security/privilege are listed for you to choose from in hierarchical order. Manager has full security and rights to manage accounts, as well as use any part of the program. You can choose other rights as you see fit.

Enter the password for the new account. Passwords are case-sensitive.

Once the new account has been created, a text document with the name of the new account, its privilege set, and password is produced and placed upon the desktop of your computer for your reference. Keep it in a safe place with all of your user passwords.

Delete Account

This is obvious enough. Be very careful when deleting Manager accounts to be sure that you have at least one Manager account at all times. You may not delete the account you are currently logged in as.

Reset an Account's Password

Change the password for a given account that is not your own. This is a management function for situations where someone has forgotten their password, and the manager wishes to reset it, or if an employee leaves and the manager wishes to keep that employee from accessing the system.

You do not need to fill out the account's privilege set field in order to change the password. .

Once the account password has been changed, a text document with the name of the new account, its privilege set, and password is produced and placed upon the desktop of your computer for your reference. Keep it in a safe place with all of your user passwords.

Change Your Password

Change the password of the user who is currently logged in.

Activate/Deactivate an Account

This is useful for when you do not wish to have a given user access the system for whatever reason. If a user is going to be out of town for a while, you may also wish to deactivate and later reactivate their account.

Only users with Manager Privileges may use this function. Assuming you are a manager, you need only choose the account name from the list and click Continue.

Re-Login

The **re-login** function is the same here as it is on the bottom of every non-calendar screen in AcuBase Pro. Click **Re-Login** to log in as a different user than the user already/currently logged in.

HIPAA Log File

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) requires that billing and practice management software have controls over who can use and view health-related data, as well as auditing what changes have been made to the data and by whom. AcuBase does this in the Patients section by requiring users to click on an “Edit” button, which allows access to edit fields, but also writes changes to a log file that can be reviewed at any time.

The **HIPAA Log File On/Off** setting does not turn off the log file, but rather turns off a pop-up which appears on the screen after changes are made. This pop-up allows users to specify why a given change was made.

Click on the **Open** button to view the log file for HIPAA audits and/or to review changes made to patient records.

As time goes on, the log file will get larger and larger. You should clear it every so often by backing it up using the Clear link, which saves a copy of log text to your computer and clears the log file database.

Backup AcuBase Pro

Clicking on this button makes an immediate backup of the AcuBase file to the Backup folder within the AcuBase Pro directory on the computer. The date and time of the last backup is recorded here as well. Each time you close the program, AcuBase Pro will ask if you wish to make a backup.

We recommend that you further back up the whole AcuBase folder onto a CD, Zip disk, or some other removable media. If something goes wrong with your computer, you can always load the backed-up program onto another machine without losing data. Simply backing up the AcuBase Pro folder/directory (with the program CLOSED) will save all data related to the program. Mac users, copy the AcuBase Pro folder from your hard drive to your backup media. PC users, back up the AcuBase directory, located at C:\program files\trigram software\AcuBase (where “C:” equals the letter of your hard drive).

It is ***essential*** that you keep a backup of all files related to AcuBase, as well as any and all other mission-critical files that you use. This is your responsibility as a businessperson and a prudent computer user.

THE MAKERS OF ACUBASE PRO ARE NOT RESPONSIBLE FOR DATA LOST WHEN NO RECENT BACKUP HAS BEEN MADE AND SAVED TO BACKUP MEDIA.

License Code

AcuBase Pro is licensed on a yearly basis, with different license fees depending upon whether you are using the program on only one machine, or on a network. Upon registration, you will be given a license code, and this is where you go to enter it. Simply click on the License button, and Update, to enter the code. Expiration information appears to the right of the button.

The Activities Tab

This is where you customize default information related to activities such as SOAP notes, call records, progress reports and the like.

Click on the **Select an Activity** pop-up list to choose an activity to customize, or scroll to the bottom of the list and select **Edit** to add as many new activities as you wish.

Once you have selected an activity, click in the **Default Notes for This Activity** field to customize the default notes for that activity.

Once you are in a patient's record, you will see an **Activities** tab that will give you this same pop-up list of activities to assign to the patient, and the text entered here will automatically populate that activity for that patient and be modifiable for each specific use.

We will cover the Reports tab in its own Chapter.

The Calendar Settings Tab

General Calendar Settings

Start Week On Monday (instead of Sunday) does just that within the Week View screen when this box is checked. The "Yes" box is checked by default.

Select Current Date on Start Up will automatically send you to the current date the first time you open the Calendar, rather than leaving you on the last screen viewed. The "Yes" box is checked by default.

Show Conflicts on Schedule will show a red line alongside conflicting appointments. This slows the program down a bit, but the "Yes" box is checked by default.

Empty Patient Filter Shows is set to "All" by default. When you add a patient to an appointment, it will show all patients in the database (All), or will show none and wait for you to type the first few letters of the last name to show them. If you have many hundreds or thousands of patients in the program, you may wish to set this option to "None" to avoid waiting for the full patient list to populate.

Show Appointment Times Starting At allows you to choose what time the schedule shows that it starts at on Weekly and Schedule screens.

Show Full Backgrounds: Setting this to "Yes" will leave the calendar data visible in the background when new items are created. This is somewhat slower for the program, and is set to "No" by default.

Week & Schedule Views

The Two Kinds of Week Views

Our basic week view shows the 7 days of the week as 7 vertical columns with the appointments for each day listed below the day.

On our "fancy" week view we place each appointment vertically within the day's column at a point corresponding to its start time and draw that appointment in a curved rectangle whose length corresponds to the appointments duration. This view looks best when the calendar is tightly filtered (perhaps showing just one user's appointments) so that there aren't too many overlapping appointments. While the "fancy" week view only shows 5 days at a time, a "Show Weekends" button in the upper left will "scroll" the week to the right so that you can see the weekend.

Note that the "fancy" view will only show appointments that have a start time, where the basic week view will show all appointments, even if they have no times assigned.

Use Basic Week View is set to "No" ("not fancy") be default, as it is much faster and shows all appointments.

Default Level of Detail for Week and Schedule views shows only basic (title of appointment) information when set to "Less", and Patient and Provider information when set to "More". The program is set to "More" by default, even though it is a bit slower, in order to be sure to show patient information on as many screens as possible.

Default Scale refers to the default scale in minutes down the left side of the Week and Schedule view screens. It is set to "half hour" by default.

You'll also find default detail and scale buttons at the bottom of the Schedule and Week screens to change the detail and scale as you work.

Enter your **Default Appointment Length** (in minutes) to auto-enter how long an appointment lasts (which may always be modified for a given appointment if you wish to make it longer or shorter).

Staff, Resources, Types & Colors

The gray sub-tab bar on the top-right side of the Calendar settings screen allows you to click between these three kinds of settings.

Staff

Enter all staff, providers, and/or users who will use the calendar so that appointments may be assigned to them. Add both providers and regular staff to this list--add anyone for whom you'd like to make appointments by clicking into the existing list fields to change them, or by clicking on the green "New Staff" button to add users. You may add as many users as you like.

Each user of the calendar is required to have unique initials that refer to them. The calendar uses initials as Keys when filtering appointments.

Setting the **Default Appointment Length** will automatically set the End Time of appointments made for a given user when their initials are checked on the Edit Appointment screen (when making an appointment for that user or practitioner).

Resources

Resources may be set up as anything from a room to a provider, and are best assigned when multiple providers and/or multiple rooms are being scheduled. Resources show up by default across the top of the Schedule view, and are great for when you want to show the daily schedule for multiple rooms and/or providers side-by-side.

Resource abbreviations are used on the Daily View of the calendar where there is no room for the whole Resource Name.

Add the initials of your providers here as well and assign them the type "provider". Then you'll be able to use the resource filter on the Schedule tab to show your day by room OR provider.

If you can think of other uses for the Resources across the top of the Schedule screen aside from Room or Provider, feel free to add those to the Resource Types list.

If the term "Resources" just confounds you and makes you mad and you really want to use a different word to refer to Resources, you can change the word, its plural, and abbreviation on this screen as well. In all seriousness, this may be useful if you choose to only assign Resources as Providers, for instance. Then you can change it to "Providers". Or Rooms. Whatever you like. You're the boss here.

Click on the **New Resource** or **New Resource Type** buttons to create new ones, or simply click into the lists to edit existing ones.

Types & Colors

The appointment types and colors sub tab is where you may edit the types of appointments which you may assign to any given appointment. Some examples are included by default. Each time you assign a calendar entry a Type, it will show on the calendar in the color assigned to that type.

Add as many types as you like on the list to the left, and as many colors as you like on the right by either editing existing entries (clicking into them), or clicking on the **New Type** or **New Color** buttons.

If you do decide to add new colors, be sure they are at least 25 pixels high and 888 pixels wide.

Types and colors show up on the Legend for reference at the bottom corner of every main calendar screen.

The General Billing Tab

The General Billing Settings section relates particularly to the functions of the Invoices section of AcuBase Pro.

Default Invoice

The Default Invoice allows you to select the to select whether you tend to print general superbills or CMS 1500 forms most frequently, and adjusts the inner program defaults accordingly.
Newly created patient cases, as well as invoices, will default to this setting, but can also be further specified/changed for each case or invoice.

E-Billing Yes/No

Electronic Billing Setup is set to “No” by default. If you wish to use the electronic billing capabilities of AcuBase Pro, you must set E-billing to “Yes” before you are able to bill electronically. If you are interested in using electronic billing, please follow the instructions in the Electronic Billing section of this user’s manual.

Billing Statement Footer

This option allows you to change the message that appears at the bottom of invoice statements you may send to your patients.

Tax Settings

The Procedures Tax and Products Tax fields allow you to set default tax amounts for products and services that you provide, which will show up in both the inventory database and on invoices, respectively.

Note that taxes on each product and service may be changed within each record, as well.

Tax percentages must be entered in decimals. So, if your products are taxed at 5%, you would type “.05” rather than simply “5.”

Note, too, that, while a Products tax rate may automatically be entered when adding a new item to inventory, if the tax rate is later changed, it will not change the tax rate on previously entered inventory items. These items will need to be changed manually.

If the tax rate you charge for products changes, you may change the rate in the Products Tax field, and then automatically assign that new rate to all existing inventory without having to change each item manually in the inventory database. To do this, once you have changed the Products Tax field to the new rate, click on the button next to the field.

CMS 1500 Form, Box 24

The CMS 1500, Box 24 option allows you to enter default information that will automatically appear on each line of the CMS invoice upon entering the dates of service. Though you may have parts of your invoice auto-entered, you can still change those fields on each invoice if you wish. Information entered in boxes D and F will also flow through to Superbills.

The Billing Codes Tab

The Billing Codes tab gives you access to **both Procedure (CPT)** and **Diagnosis (ICD-9)** codes. These are the lists that pop up when using the Patients and Invoices sections of the program.

You may choose to sort the codes alphabetically by description or numerically by code by clicking on the field name at the top of the list.

Click into any of the procedures or diagnoses listed to edit them, as well as adding modifiers, prices, tax amounts (%--must be entered in decimals) for each procedure, and your own codes. To create new procedures or diagnoses, click on the New Code button above the code list. You will be given a blank line at the bottom of the list of codes to put in a new entry. The lists will automatically re-sort as soon as you click outside of them.

You may view either list in its entirety for the purposes of doing Finds or sorting or printing them by clicking on the List button.

Delete a code by clicking on the trash can (Delete) icon at the end of the line in question.

There are typically thousands of possible diagnosis codes which users in different clinical settings may wish to have at their disposal. Because most offices use a handful of diagnosis codes frequently, a small **Use** box appears to the left of each diagnosis. Select or de-select the codes you wish to have pop up in code lists throughout the program. You may click on the **Select All/None** button to select or deselect ALL codes in the program.

As a courtesy, AcuBase Pro comes with current ICD-9 and many CPT codes already entered, but it is your responsibility as a professional to make sure you code your billing correctly.

Codes change yearly, so many of the codes that initially came with AcuBase may no longer be current. New code sets are typically available in October of every year.

The Insurance and Referral Sources Tab

The Insurance and Referral Sources settings are places for you to enter commonly accessed insurance company and referral source information.

These settings allow you to enter an unlimited number of insurance companies or referrers, keeping this information current in one place so that it may accurately be auto-entered into the appropriate places in them Patients database.

Click on the **New Company** button to create a new record. Edit any record by clicking on its name from the list of available entries.

Delete an entry by clicking on the trash can (Delete) icon on the far right side of the line. Click on any entry on the list to see more information related to that entry.

The patients associated with the insurance company and/or referral source (assigned from within the Patients tab) will show up in a list under each company or referrer when you select that company or referral source to edit.

When viewing individual Insurance Company or Referral Source entries, return to the main Preferences section by clicking on the Back button or on the small wrench icon on the top-right side of the screen.

The Archives Tab

Rather than simply deleting old patients, you may choose to archive them. If you choose to archive the patient, their record will no longer appear in AcuBase's Patients area, but billing and calendaring references will remain intact, and you may bring the patient back into the database by going to this tab in Settings.

On the left side of the Archive screen is an alphabetical list of all patients currently active in AcuBase. Click on a patient name from this list to remove it from being active and to archive it. Once archived, that patient's record will appear on the list on the right side of the screen (archived patients).

Archived records may be brought back into AcuBase by clicking on any of the name in the archived patients list, which will remove it from that list and bring it back into your active patients list both on this screen and under the Patients tab.

The Vendors Tab

The Vendors tab allows you to keep track of vendors you may frequently use when ordering supplies which will be placed into the **Inventory** database (under the Inventory tab).

The Vendor settings allow you to enter an unlimited number of vendors /suppliers, keeping this information current in one place so that it may accurately be auto-entered into the appropriate places in the Inventory area of AcuBase Pro. Any items in inventory associated with a given vendor (assigned from the Inventory tab) will show up in a list under each company when you select that company to edit.

Click on the **New Vendor** button to create a new record. Edit any record by clicking on its name from the list of available entries**. Delete** an entry by clicking on the trash can (Delete) icon on the far right side of the line. Click on any entry on the list to see more information related to that entry.

The inventory items associated with the vendor will show up in a list in the vendors' edit window.

When viewing individual vendor entries, return to the main Preferences section by clicking on the Back button or on the small wrench icon on the top-right side of the screen.

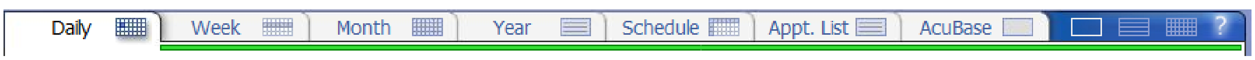
Chapter 4: Using the Calendar

Upon clicking the Calendar tab, a new window opens which allows you to use the calendar and the rest of the program simultaneously. When the calendar opens for the first time, you are taken directly to the **Daily View** for the current day (today), with all appointments listed in order of time (earliest to latest).

Note: If that calendar has already been opened and you return to the non-calendar part of AcuBase Pro, returning to the calendar will take you back to the last window of the calendar you viewed.

Settings for the calendar are found on the Calendar tab in the Preferences section of the program (accessible through the AcuBase tab on the top of the calendar screen).

The top of the calendar screens are different from the rest of AcuBase Pro:



Because of its complexity and wealth of features, the calendar has its own tabbed system of **Day**, **Week, Month**, **Year**, **Schedule**, **Appt**. (Appointment) **List**, and **AcuBase.**

To the right of the AcuBase tab are 4 buttons in blue: View as Form; View as List; View as Table; and the standard ?/Help button. (These are all icons, but you can hover the mouse over these to see their titles.)

The Daily, Week, Month, Year, and Schedule tabs all have some of the same buttons available within them: Show Filters; Go to Today; Select Day; and arrow keys to move you forward or back through time (who knew that a database could be programmed to do time travel?). At the bottom of these screens are also a Search and a Print button, as well as a Legend and some directions as to what different colors on the screens represent. Each screen also has unique features, and we will go over it all below…

Navigating the Calendar

The **Go to Today** button at the top right of most screens will go to the current date, of course. Beyond that, arrows found next to the date on the top of most screens, and down the sides (depending upon what screen you are looking at), will move you backward and forward through time—by the day, week, month, or year depending upon the screen you are looking at.

The **Select Day** button will take you to a screen where you may enter a date and jump directly to it on the calendar. Clicking on the tiny calendar button on the right-end of any date field in the program will pop up a smaller calendar that also allows easy navigation to or choice of a given day for that field.

Note that the standard date entry format is mm/dd/yyyy.

Filtering Appointments

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AcuBase Pro's calendar allows you the ability to show only certain types of appointments. Clicking on the green **Staff, Patient**, **Resource**, or **Type** headings in the Daily view, or clicking on the **Show Filters** button in the Week, Month, or Schedule views, will allow you to show only those appointments you wish to see.

Clicking on the green headers that show in Daily view or when you click the Show Filters button will bring up a screen which allows you to choose what kinds of appointments you wish to see.

This list comes from information entered into the Calendar section of AcuBase Pro's Settings. If ever you feel that fewer than all appointments are showing on the Calendar, be sure to check the Filter Appts button to be certain no appointments are being filtered out.

Creating New Appointments

There are three basic steps to setting up an appointment for a patient, and the first two assume that the patient is already in the Patients database. If you wish to enter a patient who is not already in the database, see #2 below. If you wish to enter an appointment which does not involve a patient (say, "Take car in for service") see the end of #3 below.

To enter a new appointment for a patient:

1. Click on the **New Appointment** button at the top of the Daily view; click on a time slot in Week view; or shift+click on a date in Month or Schedule view. Any of these actions will bring up the **Edit Appointment** sub screen, where you may enter the specifics of a given appointment.

2. Put in all details of the appointment. If the appointment is for a patient, click on the **Select Patient** button on the top-right side of the Edit Appointment screen. Doing so brings up the **Select Patient** screen, where an alphabetical list of all patients shows up by default. At the top of the screen where it says "Name begins with", type the first few letters of the last name of the patient you wish to schedule to narrow the list and then hit the **Tab** key on your keyboard to show the narrowed list.

Assuming there are patients in AcuBase who have last names with the letters you entered, their names will appear in alphabetical order in the list below the field. Click on the name of the patient you wish to enter an appointment for from the list. Their name will now appear on the “Selected” line. Click on the Continue button to return to the Edit Appointment window.

If you wish to enter an appointment for a patient who is not already in AcuBase Pro, simply click on the **Add New Patient** button on the right side of the Select Patient window. This will bring up the **Edit Patient** window, where you should enter the new patient’s name and main information. They will then be entered into AcuBase Pro’s Patients database, and will be entered for a new appointment. Once the new patient has been entered into the AcuBase Pro Patients database once, they will from that point forward be available to schedule and bill. You will, of course, need to go to the new patient’s record in AcuBase Pro to enter more detailed information about them.

3. Enter other details of the new appointment.

Other features of the Edit Appointment window include:

Date and End Date: The current date is entered by default, but may be changed, and an end date is not necessary unless your appointment spans more than one day. The week of the year appears small in gray at the end of the Date and End Date fields when they are filled in, and a mini-calendar at the right-end of those fields may also be popped up to choose a date. Arrows on either end of the fields move forward and back one day at a time.

The Time field should also be used, but if it is not, appointments without a specific time will appear at the top of the Daily view. End time is put in automatically based upon which provider is chosen and the default appointment lengths that are set up for that provider in the program’s Settings (see Calendar tab in Settings section of the program for more).

The small **Repeating (Yes)** button will be covered in further detail below

The Resource field refers to resources you have set up in the Calendar Settings (see Calendar tab in Settings section of the program documentation for more). Resources may be set up as anything from a room to a provider, and are best assigned when multiple providers and/or multiple rooms are being scheduled. The Resources show up in calendar filters, and are especially useful to have when viewing the Schedule tab. (See more on the Schedule tab below)

Provider or User is assigned to the appointment by initials that have been set up in the Calendar Settings (see Calendar tab in Settings section of the program for more). The provider seeing a given patient, or the person for whom the appointment is being scheduled, is assigned here. In a multi-provider office, assigning different practitioners to each appointment is essential. You may assign more than one provider/user to an appointment.

For example, if 5 people from the office are going to lunch together, all of their initials would be clicked here, and the title and description of "Lunch at Spettro's" or whatever would be entered in the fields below.

Title and Description: These fields may be left blank for a standard patient appointment, or you may wish to put a few words in about the nature of the appointment. If you wish to create an appointment which does not involve a patient (such as taking your car in for service, gong to the dentist, taking lunch, etc.), use these fields to enter the appointment information. When viewing most broader screens in the program (such as Week. Month, and Schedule views in General mode), you will only see the Title field on the calendar. Daily view shows both patient and Title.

The **Type** pop-up field is set up in your Calendar Settings section, and is color-coded. If a new patient is scheduled, a patient cancels, reschedules, you have an urgent appointment…whatever, you may code the appointment as a given **Type** here.

The **Delete** button will cancel or delete an appointment.

The **Duplicate** button will duplicate and allow you to change certain aspects of a given appointment if you wish without affecting the original.

The **(Print) Details** button will print the details of the appointment currently being viewed.

For details on the **Forms** button, see the Appt. List section of the Calendar instructions.

Click on the **Continue** button to enter the appointment onto the Calendar when ready.

Once an appointment has been set up, you can return to the **New Appointment** sub screen to modify appointments by simply clicking on the appointment on the calendar

Creating Repeating Appointments

If you wish to make a certain appointment repeat (daily, weekly, monthly, or even yearly), the Calendar allows you to do so quickly and easily.

Simply follow the directions above (under "Creating New Appointments") to put in the details of the appointment. Before clicking on the **Continue** button, however, click on the small **Repeating (Yes)** box just under the "End Date" field.

This will bring up the Repeat Appointment window. By default, the first tab on the top is set to **Daily,** and the fields below it to **Repeat Daily** and **Stop After '1' Repetition(s)**. You can set the appointment to stop after so many repetitions, or on a certain date.

If you choose to repeat the appointment weekly, click on the Weekly tab. Choose how frequently to repeat ("Repeat every x Week(s) on…"), and select as many days as you wish. Multiple days may be selected or deselected by clicking on a given day of the week.

The Monthly repeat option allows you to choose a certain day(s) of each month, or a certain day of each month or on a certain day of a given week of each month. Multiple days of the month may be selected or de-selected by clicking on a given day.

The Yearly repeat option allows you to choose which month(s) to repeat the appointment. Multiple months may be selected or de-selected by clicking on a given month. The current month is already selected by default.

To end a repeating appointment, at the bottom-right side of the Repeat Appointment sub screen, choose end after (so many times), or on a given date.

Once you have selected which appointment repetition settings you would like**, you must click Continue, and Continue again on the Edit Appointment window to create the repeating appointments**. Once you do, you can view all of the repeating appointments by clicking on the Show Repetitions button on the Edit Appointment screen.

You may delete individual appointments once they have been created without affecting other repeating appointments on the list, and may do so from the screen where you are viewing the appointment (Daily, Week, Month view, etc.), or by viewing the repeating appointments in the Edit Appointment window and using the small trash (Delete) icon at the right-end of each line.

Deleting Appointments

To delete an appointment, click on the appointment to view the **Edit Appointment** subscreen, and then click on the **Delete** button. You may also click on the small trash can icon at the far right side of the appointment you would like to delete in Daily view.

Searching for Appointments

Clicking on the **Search** button at the bottom of any screen will take you to a blank **Appointment List** view, where you may do a search for dates, times, staff initials, titles, patients, resources, and types. The results of your search will show up in the Appointment List window, from which you may click on the green arrow to the left of the appointment to go to view further details for that appointment; delete it with the trash (Delete) icon on the far-right side of the appointment line; click on the patient hyperlink to see that patient's record in AcuBase Pro; Print the list; or go to the Forms section to print or email forms you create related to the results of your search. For more on the Appointments List window, see the **Appointment List View** section below.

Printing Appointments

Click on the Print button at the bottom of any screen to print that screen's appointment list. Note that schedule, weekly, and monthly views may not print all appointments—best to either do a search for a given date range and print it from the Appointments List view, or to print from Daily view.

The Forms Section of the Calendar

A Forms button may be found on both the Edit Appointment and Appointment List windows. Innocuous as it looks, the Forms function is actually a very powerful tool which allows you to create as many new letters, forms, and/or emails as you would like, which may be merged with data from the calendar.

Examples may include birthday letters, referral thank you letters, new patient letters, and more, limited only by your imagination. Forms sections are included in the Patients and Calendars parts of the program. We have put in some for your use, and you may use those, edit or delete them, or create your own as follows.

Using Forms

You may view the Forms screen either by selecting an appointment (which takes you to the Edit Appointment screen), doing a search, clicking on View as List, or clicking on the Appt. List tab. All of these screens have the Forms button on the bottom.

On the left side of the Forms screen are the Available Forms. Click on the green arrow next to a form name to choose that form as the current one to work with, or click on the **New Form** button above the list to create a new one, entering the new form's name or editing an existing form's name on the list.

When you do select an existing form or create a new one, the form name is selected in green, and you will see its specifications appear in the yellow field on the right side of the screen in "Edit" mode. You can see the **Edit** and **Preview** sub tabs above the yellow text field on the right side of the screen, and the **Edit** tab is selected by default. You may enter this field and edit it to your heart's content.

You may add fields from the program by clicking on the **Merge Fields** pop-up list and choosing a field from the program. Once you have chosen a field, insert the cursor in the form where you want the field to be placed, and click on the **Insert Merge Field** button. Valid mail-merge fields will be enclosed in <<chevrons>>.

Save the form in whatever state you like it, whether a new one or one you have edited, by clicking on the green **Save changes to form** button.

Once the form has been created, it will appear on your list of forms on the left side of the screen. Click on the **Preview** sub tab to see what the form will actually look like. When you do so, you will see that the previously yellow text field will become blue and uneditable, and you will be given the option to either **Print** or **Email** the form.

Whether you choose to print or email the form, you will be given the choice of printing/emailing all of the **Found Set** or just the patient record you are currently viewing. If you choose to find a group of records to send or print a form for do a Search first using the Search button to find a group of records, then come back to the Forms screen. (See detailed instructions on how to perform a Search/Find elsewhere in this manual.)

Select the Form you wish to print or send, click the **Preview** tab, and click the **Print** or **Email** button. You will be asked if you wish to send/print the current patient record or all of the found set, and you may choose at that point.

Here's an example: Say I want to create an appointment reminder letter to send out via email to all scheduled patients for the week of February 19, 2007. First, click on the ***Search*** *button to go to the Appointment List window, where you will be given a blank layout. In the Date field, you would enter "02/19/2007…02/23/2007" to indicate you want to search for all appointment in the date range of February 19-23, 2007. Click on* ***Find*** *on the left side of the screen to find all of these appointments. When you see your list (your "Found Set"), click on the* ***Forms*** *button at the bottom of the screen. From the Forms screen, choose your Appointment Reminder form letter on the left side of the screen. It appears on the right side in the yellow field box. Click on the* ***Preview*** *sub tab in the middle-right side of the screen, and click on* ***Email Form****, and choose Found Set when asked.*

Assuming you have a pop email program such as Mail or Entourage on the Macintosh or Outlook on the PC, the program will open and the emails will be sent through it.

Note that AcuBase cannot email through web-based email accounts that are accessed through web sites like Yahoo or Gmail. If you have Yahoo, Gmail, or other similar web-based email, bring them into a pop-email program like Mail, Entourage, Lotus, Outlook, or the like in order to use the Email features of AcuBase Pro.

Note that forms may not be more than one page long, and that forms printed/emailed are not kept in each patient's Activity record.

Some Good Stuff to Know

- Creating a Form usually means that you will be finding/searching for a single record or group of records to send the Form to. Though the Getting Started chapter has plenty of information on performing complex searches, one common method worth repeating here is about how to find for date ranges. A common date range find involves using the elipses ("…"). So, to find all people born between August 1, 1970 and December 31, 1971, in Find mode, DOB field, you would enter “8/1/1970…12/31/1971”. To find all people born in March, use the asterisk (*), “3/*/*”.

- In creating forms themselves, you are able to use all of FileMaker Pro (the program AcuBase was created in) in order to merge fields from the program and customize your forms. One common field is the date (current date/today). To add that to a form, enter “<<Get(CurrentDate)>>” (without quotes) where you want that date to appear.

- One consequence of the way that Forms work is that all forms will print in Arial font, 11 point type size, regardless of whether you make it appear otherwise using Format menu. If you want to use a different font you have to use the following example calculations:
  - <<TextFont (FirstName ; "Courier")>> To make the ‘first name’ field show in Courier font.
  - <<TextSize (FirstName ; 12)>> To make the ‘first name’ field appear in 12-point size.
  - <<TextStyleAdd (FirstName ; Bold)>> To make the ‘first name’ field bold face type.

  You can also combine calculations by nesting the functions:
  - <<TextStyleAdd(TextSize(TextFont(FirstName; "Courier"); 16); Bold)>> To make the ‘first name’ field Courier 16-point, bold face type.

The Many Calendar Views

Tabs across the top of the Calendar screen allow users to see the Calendar in **Daily**, **Weekly**, **Monthly**, **Yearly**, **Schedule, Appt. List**, and **Table** views**.** A **To Do List** tab is also available from the Daily view. More detailed explanations of each view follows.

The Daily View

The first screen you see when clicking on the Calendar tab from anywhere else in AcuBase Pro is the Daily View, which will show the calendar for the current day by default. In addition to the standard tabs and buttons explained earlier in this chapter, the Daily View has two sub tabs:

Appointments and **To Do List**

Whether you are viewing Appointments or the To Do List, the right side of the screen shows the past, current, and next month’s mini-calendar, with the selected date being viewed shown in green, and today shown in yellow. Clicking on any of the dates on these mini-calendars will take you there, and clicking on the month field on the top of the middle calendar will take you to a screen which allows you to jump to any date.

The Daily View Appointments screen shows the greatest detail of any Calendar screen, including date, start and end time, staff initials, title of appointment, patient name, resource, and type. A blue dot in any Title field indicates that more detailed notes are present related to that appointment, and a red bar next to an app indicates that there may be a time overlap (conflict) between that appointment and another one.

Appointments are shown in order of time (earliest to latest, with appointments without assigned times showing up on top), and the details of a given appointment may be accessed by simply clicking on the appointment, which will take you to the “Edit Appointment” sub screen for that appointment. If there are no appointments set up for a given date, all of these fields will appear blank.

Green filter headings of **Staff, Patient, Resource**, and **Type** allow you to filter by those headings (see more on Filtering appointments earlier in this chapter).

If a patient has been assigned to the appointment, their name will appear as a blue hyperlink, which may be clicked upon to go directly to their patient record in AcuBase Pro, or to a Mini Screen containing some of their basic information from the AcuBase Pro Patients section.

To Do List

The To Do List may be accessed from the gray sub tab just below the date on top of the Daily view screen. The To Do List shows all To Do items in date order (oldest first). Items that have not been completed appear in red; those that have are in black. The list view of the To Do List shows the To Do item’s title, the Staff assigned to it (which may be filtered—see instructions on filtering earlier in this chapter); the date due; and the date completed. A trash (Delete) icon shows at the right end of the line indicating the ability to delete a given item.

You may print the To Do List or Search through it using the Print and Search buttons on the bottom of the screen.

Upon clicking on a To Do List item or clicking on the New To Do button on the top of the screen, you are taken to the Edit To Do window, where you may enter a title for the To Do List item; a description; dates due and completed; and users assigned to the task. Items may also be duplicated and modified in this window.

Return to the rest of the Calendar by clicking on the gray Appointments subtab on top of the screen, or any of the other available view tabs.

The Week View

Clicking on the Week tab will take you to the week view for whichever day is selected in Daily View. If today’s date is in the selected week, it will be highlighted in yellow.

Click on the date portion of any day (day of week or date) to jump to that date's Daily view. Click on any appointment in the list for a given day to see the details about that appointment.
Go to the next or previous week using the arrow buttons to the left of the date on top of the screen. Use the up-down (+ and -) arrows on the far left of the screen to see earlier or later times of the day, respectively.

Monday through Friday shows by default, but you may click on the green "Show Weekend" button above the appointment times on the left side of the screen to show weekend days as well. When you do show weekends, the Show Weekend button changes to say "Show Weekdays" in order to do just that.

The Appointment times down the left side of the screen show differently depending upon the Calendar settings for Week View (in the AcuBase Pro Calendar Settings). Our basic week view shows the 7 days of the week as 7 vertical columns with the appointments for each day listed below the day.

On our "fancy" week view we place each appointment vertically within the day's column at a point corresponding to its start time and draw that appointment in a curved rectangle whose length corresponds to the appointments duration. This view looks best when the calendar is tightly filtered (perhaps showing just one user's appointments) so that there aren't too many overlapping appointments.

While the "fancy" week view only shows 5 days at a time, a "Show Weekends" button in the upper left will "scroll" the week to the right so that you can see the weekend.

Note that the "fancy" view will only show appointments that have a start time, where the basic week view will show all appointments, even if they have no times assigned.

The calendar will show the starting time according to the start time you set in the Calendar Preferences, and may show in increments of 5, 10, 15, 30, or 60 minutes. The default increment is also set up in Preferences, but may be changed on the fly at the bottom of the screen.

Because it is difficult to get all details of a given appointment into the small amount of space available on such a screen, you will see less information on this screen for a given appointment than on Daily view. You may change the level of detail shown from simple Title and color/category of appointment (default) to more detail (Patient information) by clicking on the Detail buttons on the bottom of the screen. If you made a bunch of patient appointments without titles and descriptions, and they are all showing up as blank spaces on the Week view calendar, click on one of the **Detail** buttons on the bottom of the screen to see more.

To create a new appointment from the Weekly view screen, hold down the **Shift key** on your keyboard while clicking on the date for which you wish to make an appointment to bring up the **Edit Appointment** sub screen. Appointment filtering may be activated from the Show Filters button on top of the screen.

To print the Weekly View, click on the **Print** button on the bottom of the screen.

The Month View

Clicking on the Month tab will take you to the month view for whichever day is selected in Daily View. Move back and forward a month at a time using the arrows to the left of the date on the top of the screen.

If today's date is in the selected month, it will be highlighted in yellow. If the current date selected in Daily view is not today, it will show up in green.

Click on the numeric portion of any day (the date number itself) to jump to that date's Daily View. Because it is difficult to get all details of a given appointment into the small amount of space available on such a screen, you will only see the time, user/provider initials, and title for each appointment in this view.

Click on any appointment in the list for a given day to see the details about that appointment. If more appointments are available for a given day than can be shown on the screen, a small red dot will appear in the number portion of the date, indicating that more can be seen on Daily view.

To create a new appointment from the Month view screen, hold down the **Shift** key on your keyboard while clicking on the number portion of the date for which you wish to make an appointment to bring up the Edit Appointment sub screen.

Appointment filtering is also available from the Show Filters button at the top of this screen, and the To Do List may be viewed on the Month view by clicking on the To Do List button on the top-right corner of the Month view.

To print the Month View, click on the Print button at the top of the Monthly View screen.

The tiny "reset" button on the far-right side of the screen should not be used unless you are told to use it by a Trigram Software technical support representative.

The Year View

Clicking on the Year tab will take you to the year view for whichever day is selected in Daily View. Move back and forward a year at a time using the arrows to the left of the year on the top of the screen. Click on any month to go to the Month view for that month.

The Schedule View

Clicking on the Schedule tab will take you to a Schedule view for whichever day is currently elected in Daily view. This screen is a great feature for medical offices, and is designed to look like a standard medical booking daily schedule.

Across the top you will see the Resources that you set up in the Calendar Preferences (see Calendar tab in Preferences section of the program documentation for more on this). Resources may be set up as anything from a room to a provider, and are best assigned when multiple providers and/or multiple rooms are being scheduled. While only five resources show up by default on the Schedule screen, you may scroll to more resources, or to the previous resources, by clicking on the gray "Next" and "Prev. Resources" on the top-right and top–left sides of the screen, respectively.

The Appointment times down the left side of the screen start according to the start time you set in the Calendar Preferences, and may show in increments of 5, 10, 15, 30, or 60 minutes. The default increment is also set up in Preferences, but also may be changed on the fly at the bottom of the screen.

Click on any appointment in the list for a given day to see the details about that appointment. Because it is difficult to get all details of a given appointment into the small amount of space available on such a screen as this, you will see less information on this screen for a given appointment than on Daily view. You may change the level of detail shown from simple title and color/category of appointment (default) to more detail (Patient information) by clicking on the **Detail** buttons on the bottom of the screen.

If you made a bunch of patient appointments without titles and descriptions, and they are all showing up as blank spaces on the Week view calendar, click on one of the Detail buttons on the bottom of the screen to see more.

Go to the next or previous day using the arrow buttons to the left of the date on top of the screen. Use the up-down (+ and -) arrows on the far left of the screen to see earlier or later times of the day, respectively.

To create a new appointment from the Schedule view screen, hold down the **Shift** key on your keyboard while clicking on the date for which you wish to make an appointment to bring up the **Edit Appointment** sub screen.

Appointment filtering may be activated from the Show Filters button on top of the screen.

Appointment filtering is available from the **Show Filters** button at the top of this screen. When this button is selected, it turns into a **Resources** button so that you may switch back to showing the Resources again by clicking on it.

*Note that this screen was mainly designed to be shown on-screen and may only print what shows on screen at the time you select the **Print** button. Should you decide to print this screen, you should also select to print page 1 to 1 to avoid printing duplicates.*

The Appointment List View

The Appointment List is a very powerful screen where you may do complex searches, print/email forms, and print selected lists of appointments. After some time using the Calendar in AcuBase Pro, youwill find yourself using the Appointment List view more frequently than perhaps any other view aside from Daily view.

Aside from accessing the Appointment List directly from the tab itself, you will also see it if you click on **Search** from anywhere in the Calendar, and when finding groups of appointments from AcuBase Pro's Patients/Appointments tab. Clicking on **View as List** (two buttons to the right of the AcuBase tab on the top of the screen) will bring you to the Appointment List view as well, showing only a list of appointments for the day selected.

Like the Daily view, the Appointment List screen includes date, start and end time, staff initials, title of appointment, patient name, resource, and type.

A blue dot in any Title field indicates that more detailed notes are present related to that appointment, and a red bar next to an app indicates that there may be a time overlap (conflict) between that appointment and another one.

Appointments may be sorted by clicking on a given field header, and the details of a given appointment may be accessed by clicking on the green arrow on the left side of the appointment, which will take you to the **Edit Appointment** subs creen for that appointment.

If a patient has been assigned to the appointment, their name will appear as a blue hyperlink, which may be clicked upon to go directly to their patient record in AcuBase Pro, or to a Mini Screen containing some of their basic information from the AcuBase Pro Patients section.

At the top of the Appointment List screen next to the word“Appointments” are three boxes. Putting the mouse over each will reveal that the first is the **View as Form** button, which will take you to the Schedule view for whichever appointment record is currently selected in the list.
The next box is the **View As List** button, which is inactive because it is the current view. And the third box is **View as Table**, which is covered in the View as Table details later in this chapter.

At the bottom of the screen are Search, Print, and Forms buttons.
Searching and using Forms are both covered in more detail earlier in this chapter. The results of searches may be printed by clicking on the Print button on the bottom of the screen.

The AcuBase Tab

Use the AcuBase tab near the top-right side of the screen to return to the main AcuBase Pro program at any time. The calendar will generally stay open in the background when you leave it for the rest of AcuBase, and you may return to whichever Calendar screen was last open at the time you left it by clicking on the Calendar button from other non-calendar AcuBase Pro screens, or by going to the Window menu and clicking on the calendar screen you wish to see.

View as Form, List, and Table

At the top of the Calendar screen to the right of the AcuBase are three boxes which appear on all but the Year view main screens. Putting the mouse over each will reveal that the first is the **View as Form** button, the second **View as List**, and the third **View as Table.**

View as Form has the intent of viewing only one day at a time, whereas **View as List** assumes you wish to look at multiple appointments over perhaps multiple days. View as Form will generally return you to the Daily view from most other screens in the Calendar, while View as List will take you to the Appointment List view. View as Form is inactive when already in Daily view, and View as List is naturally inactive when already in Appointment List view.

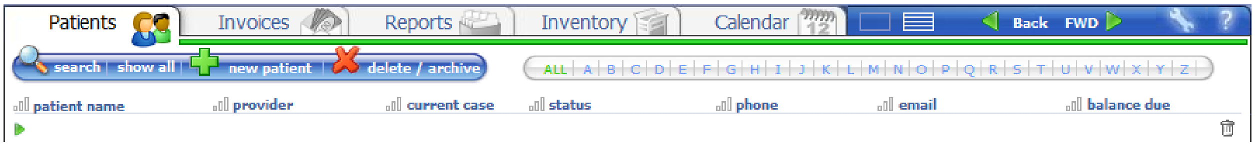
View as Table shows a database list view of selected appointments with all fields shown at the top in their original database field names. This screen may be more useful for "power users" who wish to import and export calendar-related data. You may enter and search through these fields, and even click on the "Save to Excel" button on the top-right side of the screen to export the currently shown data to Excel or other field formats.

Getting Help

To get help from any screen, simply click on the "Help" button on the topright side of any screen. You will be taken to context-sensitive help (help specific to the screen you were looking at), which contains relevant information from this user's manual.

Chapter 5: Using the Patients Tab

The Patients tab is your home for all patient-related activity, from keeping track of patient contact information, to related billing, activities, and appointment data.



The same buttons are available at the top of each screen within the Patients tab. Two square buttons to the right of the Calendar tab represent View as Form and View as List, respectively. Clicking on these buttons from a given layout in the program will take you to a patient-specific screen or a more general list of all the patients in the database.

Clicking on a patients name will allow you to edit data on the patient information screen.

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) requires that billing and practice management software have controls over who can use and view health-related data, as well as auditing what changes have been made to the data and by whom. AcuBase does this in the Patients section by requiring users to click on this "Edit" button, which allows access to edit fields, but also writes changes to a log file that can be reviewed at any time. While it may seem annoying to be required to click on a button in order to enter data here, it is a way to keep a log of information that is edited in this section of the program. Once editing is completed, clicking "Continue" will allow you to return to viewing other screens, and will write to the log file in the background.

The Patient List

Upon clicking the Patients tab, you are taken directly to **View As List** mode, where all patients are presented in alphabetical order. (You may also return to this screen by clicking on the **Show All** button at the top of any patient-related screen, or **the View As List** button next to the Calendar tab.)

Each patient record also shows the provider name, current case (payment type), primary patient contact phone number and e-mail address, and total balance due from this screen. You may sort by any one of these categories by simply clicking on the titles of each of the fields (Patient, Provider, Current Case, Total Balance Due). You may also choose to view only patients whose last name begins with a certain letter by clicking on the letter from the "Click to Show" fields at the bottom of the screen. Email a patient by clicking on their email address (note that this feature may not function in Mac OSX versions, or if your default email is not through an email program like Outlook.) To get more details on a given patient's record, click on that patient's name. This will take you to the details related to that patient record.

The Patient Detail Screen

When looking at a patient's information, a gray bar across the middle of the screen gives you the option of viewing Overview (general information), Case Details, Billing, Appointments, SOAP/Activities, or Forms. When looking at patient information, you will be taken to the Overview section by default.

The Overview Tab

This screen is where the most general patient information is kept, such as name, sex, date of birth, and contact information, as well as provider name. You may also enter a picture of or related to the patient on this screen. The patient's ID Number is created by AcuBase Pro and may be seen at the top-right side of the screen. Note that all of these fields may only be modified from this Overview screen. Tab through or click into each field to enter data.

From this point forward, you may note that many of the fields have titles that include line number. This number refers to the box number on the CMS 1500 form where the field data will appear.

Make sure that you assign a provider for the patient by selecting from the drop down menu in the **ID/Name field**

The Case Details Tab

The next available section for detailed patient information is the Case Details tab. This is one of the most unique and exciting aspects of using AcuBase Pro for your billing.

One patient may have many cases. Each case represents a new way of billing for the same patient.

For instance, a patient may see you for a headache and pay cash, thus making their type of case a "Cash" case. A few months later, the same patient may come to see you after an auto accident, and wish to have you bill their auto insurance (which makes the Type of Case an "Auto Accident"). Later still, if this patient has a work-related injury, you may wish to create a new Worker's Compensation case.

Each case will be given a **Type** (hence the **Case Type** field), which is another way of classifying the type of payment for a given case. AcuBase Pro allows you to keep multiple cases for the same patient, with up to three insurance companies for each case (primary, secondary, and tertiary).

The current, default case is the case currently being billed. Switch cases or create a new case in order to bill differently without losing the data related to an older or pre-existing case.

Click on the current case in the list to see the details of the case. (The first time you enter a patient into AcuBase, a default “Cash” case will be created for the patient.) You may create a new case at any time by clicking on the **New Case** button.

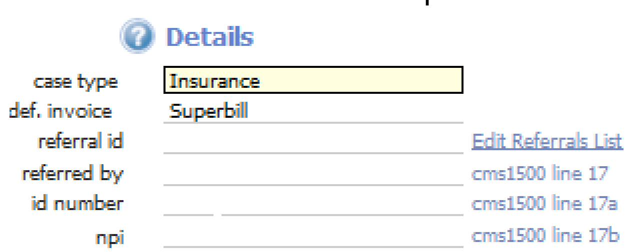
The current default case always appears with a check box next to it, and you may change the current default case to any other case in the list by clicking on the “Set as Default Case” box next to any case in the list.

Note that, when you create a new invoice (CMS or Superbill), the current default case will be the one AcuBase thinks you wish to bill for, and your invoice will reflect the current case's insurance or billing settings.

Delete a case by clicking on the small delete icon on thecolumn of any case in the list.

Upon clicking on a case, you are presented with four main tabs for Billing Preferences, and three Insurance/Payors.

When you create a new case you will brought to The Billing Preferences tab. This has the basic information about the case and how the patient’s invoices will be created.



The **Case Type** pop-up list allows you to change the name of the case, and you can also choose the default invoice type (Superbill or CMS form) for the current case.

Click on **Referral ID** to pop up a list from the referral settings (Settings section of the program), which will auto-enter the referral’s ID and/or NPI numbers.

For each case, choose up to four *diagnoses*. These diagnoses will appear on Superbills as well as on the CMS 1500 form’s line 21. By default, AcuBase Pro sorts diagnoses by description, but you may choose to enter a code directly as well. You may skip through these lists when they pop up by typing the first few characters of a given diagnosis or code.

Note that, while entering the Code will not auto-fill the Diagnosis section,clicking on the Diagnosis and putting the description in there will indeed change/fill the Code field with the correct code. You may also hit the “Esc” key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other diagnosis which may not already be on the list.

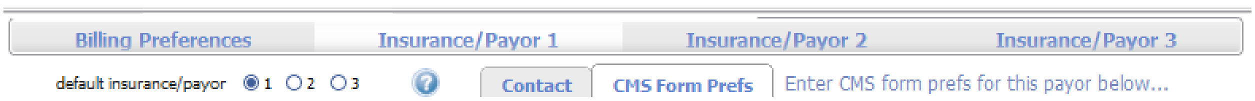
To change, add, or delete available codes, go to the **Billing Codes** subtab under **Settings**.

The next section under the Billing Preferences tab is **CMS 1500 Form, Box 24/Superbill Procedure Defaults**.

Each case for which you plan on billing onto a CMS 1500 form may have up to six lines of billing. Fill these fields out to automatically put onto this patient's invoice each time you create an invoice for them.

Once you have set up billing preferences for this case, AcuBase will automatically use these default entries in order to do your invoice data entry for you. Upon entry, these fields will autofill will data from the General Billing tab in the Settings for the program, and can be changed here for an individual patient's case, and/or on an individual invoice as you see fit. Information entered here (in boxes D and F) will also flow through to superbills.

The **Insurance/Payor** tabs (1-3) allow you to enter up to three insurance companies or other types of payor for each case. In some cases, a patient may have multiple payors (primary, secondary, or even tertiary) for a given case.



For example, the current case for a patient may be Auto Accident. Their primary payor is another party's auto insurance company. Their secondary, if that does not pay, is their own auto insurance, with their third option being their own medical insurance or even a lawyer. By default, AcuBase Pro assumes you wish to bill the primary payor. To choose the secondary or tertiary, click on "1", "2", or "3" in the "Default Insurance/Payor" field.

Note that, when you choose change an insurance company to bill (1, 2, or 3), the company chosen will be billed from that point forward. All previous invoices will retain the original insurance company information from the change was made.

The **Contact** subtab for each Insurance/Payor contains basic information about the insurance company or payor. If you are only interested in printing a superbill (and not a CMS form), this is the only tab you need to be concerned with. Click on the **Company ID** field to pop up a list of the companies you have set up in **Settings** under the **Insurance Companies** subtab. You may click on an item from your list to auto-fill the fields below. If you do not have any companies listed there, or would like to enter one that is not on the list, simply hit the "Esc" key on your keyboard, or click once in the field to clear it, and then enter the insurance company information you would like.

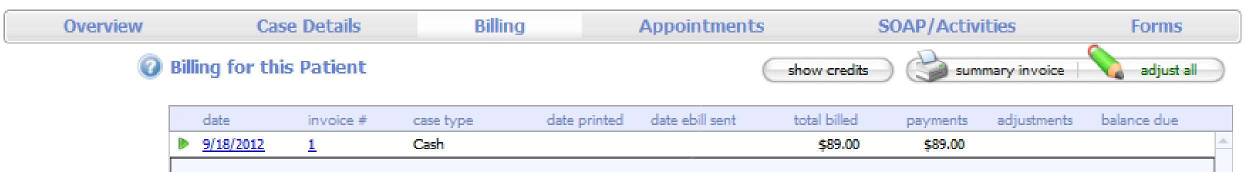
Below the Payor information is the Company/Payor Verification section, where you may enter approved dates, percentage paid, deductible information, etc. for each payor.

The **CMS Form Prefs** subtab are meant for pre-loadinginformation related to this case which will go onto a CMS 1500 invoice. By entering this information here, it will automatically appear on each invoice you create so that you do not need to ever enter it again (though you may still change individual CMS invoices regardless of what is in this cases section). The fields in pink are editable. Note that, in fields where check boxes are the norm, only one check box may be checked, and you will need to un-check one box before checking another in a given section. (For instance, if for Sex you have a check in “F”, you will need to click on the “F” field first to uncheck it before checking “M”.)

Note, too, that the formatting you see in these fields is meant to conform precisely with government mandated CMS form standards, including date formats and the pop-up lists you see.

The Billing Tab

This screen is essentially a summary list of all of the patient’s invoices, sorted by date.



A summary invoice may be printed from this screen. Clicking on any of the invoices will bring you to the **Overview** screen for that invoice. The sum of all outstanding invoices is seen at the bottom of the screen.

The Appointments Tab

The Appointments tab shows each appointment’s date, start and end time, staff initials, title of appointment, some of the detail (if any) written about the appointment, resource assigned, and type. A small trash can (Delete) icon on the far right side of each appointment line allows you to delete the appointment if you wish.

You may use all of the functionality of the Calendar’s Appointment List screen from any patient’s Appointments screen, including Forms functions, printing lists of appointments, and more.

Click on the green arrow to the left of a given line to go to the details of that appointment on the calendar. Doing so brings up the Edit Appointment window. Details about this window may be found in the Calendar chapter of the manual or on-line help.

Use the **Show as List** button on top-right side of the Appointments screen to print appointment times and/or use the full functionality of Calendar-related forms for this patient's appointment list.

Note: Upon clicking the Show as List button, you will be given the option of showing all of the patient's appointments, or just those from today forward. Either way, you will be taken to the Calendar's Edit Appointment screen, from which you may click on the Print button to print all appointments shown, Search for more detail, and/or use the Calendar's Forms function.

For more on each field and function related to the Appointments tab, see the Calendar chapter in the AcuBase Pro documentation and on-screen help.

The SOAP/ActivitiesTab

The Activities/SOAP tab allows you to view, enter, and print events, or activities, related to the patient. All activities are shown in list format in date order (latest date first).

Note that Activity entries of multiple pages may have up to two lines cut off at the bottom of the page depending upon what kind of printer you have. Most individual Activity entries will print up to 25 pages.

AcuBase Pro comes with several kinds of patient-specific activities by default: Calls, Faxes, E-mails, Office Visits, Initial Reports, Patient Progress Reports, and more. You may modify these forms and/or create as many as you like from the Settings/General tab.

To create a new activity, click on the **New Activity** button.

The **Status** field displays a list of the status of this activity (whether the call is open, closed, pending, etc.).

*Note: Like any pop-up list, you may edit this list and add your own choices by clicking on the field, scrolling to the bottom of the list, and selecting **Edit.***

The **Case Type** is set to the current case by default, but may be changed.

The **Activity** field is a pop-up of activities from the **Settings** section of the program. Click on the type of activity you wish to create, and it will auto fill the Notes field below. If you accidentally picked one kind of activity (say, Office Visit) and wish to change it, delete all data in the Notes field first, and then the newly chosen activity's default information (from Settings) will appear anew in the Notes field.

The **Provider ID** field will be filled with the current patient's provider settings by default, but may be modified here.

You may also enter up to four pictures or files to associate with each activity. So if you have a Word document or MRI or picture, you may click to add each and attach it to the activity. Once attached, clicking on the image of the picture or file will open it and enlarge it for viewing.

Note that Word, Excel, Adobe PDF, and other non-photo documents will not be found if they are moved around or off of your computer once they have been attached. Documents attached that were created in programs that are not on the computer that AcuBase Pro is on will not open without the program they were created in.

The **Activities** section gives you the option of sending emails directly from within the program, thus tracking all patient-related emails for you.

Note that this feature may not auto-email correctly on a Macintosh with the OSX operating system, nor for those using the Web to email (such as emailing through a Yahoo or Google account). AcuBase Pro was designed in FileMaker, and FileMaker's email functions work only with pop mail services (Outlook, Entourage, and other mail clients).

The SOAP Tab

By Clicking the SOAP tab, you are brough to a new screen where you can enter specific SOAP notes for the patient.

The Forms Tab

The Forms part of AcuBase Pro is a powerful feature which allows you to create as many new letters, forms, and/or emails as you would like, mwhich may be merged with data from the program.

Examples may include birthday letters, referral thank you letters, new patient letters, and more, limited only by your imagination. Forms sections are included in the Patients and Calendars parts of the program. We have put in some for your use, and you may use those, edit or delete them, or create your own as follows.

Using Forms

On the left side of the Forms screen are the **Available Forms.** Click on the green arrow next to a form name to choose that form as the current one to work with, or click on the

New Form button above the list to create a new one, entering the new form's name or editing an existing form's name on the list.

When you do select an existing form or create a new one, the form name is selected in green, and you will see its specifications appear in the yellow field on the right side of the screen in "Edit" mode. You can see the Edit and Preview sub tabs above the yellow text field on the right side of the screen, and the Edit tab is selected by default. You may enter this field and edit it to your heart's content.

You may add fields from the program by clicking on the **Insert Field** button. A pop up box will appear with many choices. Once you have selected your choice, it will appear in the form.

Save the form in whatever state you like it, whether a new one or one you have edited, by clicking on the **click Save changes to form** button.

Once the form has been created, it will appear on your list of forms on the left side of the screen. Click on the **Preview** tab to see what the form will actually look like. You will be given the option to either **Print** or **Email** the form from here.

Some Good Stuff to Know

- Creating a Form usually means that you will be finding/searching for a single record or group of records to send the Form to. Though the Getting Started chapter has plenty of information on performing complex searches, one common method worth repeating here is about how to find for date ranges. A common date range find involves using the elipses ("…"). So, to find all people born between August 1, 1970 and December 31, 1971, in Find mode, DOB field, you would enter "8/1/1970…12/31/1971". To find all people born in March, use the asterisk (*), "3/*/*".

- In creating forms themselves, you are able to use all of FileMakerPro (the program AcuBase was created in) in order to merge fields from the program and customize your forms. One common field is the date (current date/today). To add that to a form, enter <<Get(CurrentDate)>> where you want that date to appear.

- One consequence of the way that Forms work is that all forms will print in Arial font, 11 point type size, regardless of whether you make it appear otherwise using Format menu. If you want to use a different font you have to use the following example calculations:
    - <<TextFont (FirstName ; "Courier")>> To make the 'first name' field show in Courier font.
    - <<TextSize (FirstName ; 12)>> To make the 'first name' field appear in 12-point size.
    - <<TextStyleAdd (FirstName ; Bold)>> To make the 'first name' field bold face type.

You can also combine calculations by nesting the functions:

- <<TextStyleAdd(TextSize(TextFont(FirstName; "Courier"); 16); Bold)>> To make the 'first name' field Courier 16-point, bold face type.

Getting Help

To get help from any screen, simply click on the "?" button for that screen. You will be taken to context-sensitive help (help specific to the screen you were looking at) which contains relevant information from this user's manual.

Chapter 6: Creating an Invoice

Invoices can be created from two areas of AcuBase: the Patients tab or the Invoice tab. The Invoices tab is home for all invoice and payment related activity.

Creating an invoice from the Patient Tab

When clicking on any of the tabs across the patient's file, you will see the **New Invoice** button above the patient's name. When you click new invoice, a box will pop up asking for the treatment date. From here you will be taken to the patient's default invoice. Notice that you will also be switched to the **Invoice** tab.

The Invoices Tab

Clicking on the **Invoice** tab will allow you to create a blank invoice not attached to a patient file. This is useful if you have a walk-in customer who is buying a product.

The same buttons are available at the top of each most screens within the Invoices tab. Two square buttons to the right of the Calendar tab represent View as Form and View as List, respectively. Clicking on these buttons from a given layout in the program will take you to an invoice-specific screen or a more general list of all the invoices in the database.

The bottom of every screen shows the current user logged in, and the re-login button allows you to change whichever user is currently logged in.

The **Search** button at the top of each screen will take the user to a blank Find screen where one may find by any field on any layout in the Invoices section.

Show All brings all patient records back into the found set—especially important after doing a find/search, when you may only be looking at selected records.

The **Delete** button will delete the currently selected/viewed invoice. *Deletes are final*—there is no way to recover a deleted invoice unless you retrieve an older version of AcuBase Pro from backup.

Context-sensitive help is available at the top-right of every screen by clicking on the "?" button, as well as smaller help buttons scattered throughout specific areas of the program to help with detailed information on that area of the program. Putting the mouse/cursor over any given field will usually pop up a description of that field for further assistance. The **Preference**s button will take users directly to the general AcuBase Pro preferences. And of course, the "Back" and "Forward" buttons at the top right, part of each screen will move back and forward through previously viewed screens (not including Edit screens, for security reasons.)

Viewing the Invoice List

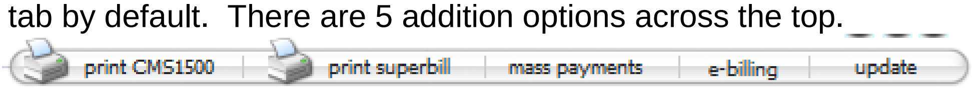
Upon clicking on the Invoices tab, you are sent to List View, with all invoices in descending order (most recent first). You may show and sort the records viewed on the screen by clicking on the A-Z buttons at the top of the screen, or by clicking on any column heading to sort by that heading, all of which sort in descending/most-recent-first order (except Patient Name, which is alphabetical).

Click on the **green arrow** next to the Patient Name field to go to that patient's record in the Patients section of AcuBase Pro. Clicking on any other part of a given line will take you to the invoice's details (Form view).

The Invoice Detail Screens

When looking at an individual invoice, many options are available. For a given invoice's information, a gray bar across the top of the screen gives you the option of viewing Overview , Superbill, CMS 1500, and Payments.

When looking at patient information or creating a new invoice, you will be taken to the Overview tab by default. There are 5 addition options across the top.



The **Print CMS 1500** button will print the current invoice onto a CMS 1500 form (you need to put the blank form into the printer).

The **Print Superbill** button will print the current invoice onto a superbill.

The **Mass Payments** button takes you to a the Mass Payment Entry screen, where you apply line-item payments to any invoice without having to go directly to each invoice's "Payment Entry" section.

This is a very useful feature when entering line-item payments from many invoices all at the same time (which is often necessary upon receipt of an insurance company's Explanation of Benefits [EOB]). The screen shows a list of all transactions related to a given patient sorted by the date of the transaction. Clicking on the gray section of each line takes you directly to that transaction's invoice. This screen works much the same as the Payment Entry tab. To apply a payment to a specific procedure, put it on the same line as the procedure using the fields on the right side of the line.

The **E-Billing** button allows you to create a new electronic billing batch file of the currently viewed invoice, or all of the invoices in the "foundset" (currently being viewed if you go to “View as List”). For more on the details of electronic billing, see the Electronic Billing chapter of the program documentation.

The **Update** button brings across all billing preferences for the current default case for the selected patient from their record in the Patients database. The Update button is very useful for occasions where you may have accidentally created an invoice with improper billing information (payor, insurance company, case, etc.), and wish to change it on the invoice without creating a whole new invoice. If you have set up an invoice for a patient, and some of their default information has since changed (address, phone, billing preferences), clicking on this button can save a lot of data entry time on the invoice by allowing you to correct that information first in the patient’s record (in the Patients section of the program), and then returning to the invoice and clicking on the Update button.

Note that invoices that already have dollar amounts in them (superbills or CMS lines 24) will not allow the Update feature to work as a safety precaution to keep users from accidentally modifying pre-existing invoices. If you do wish to modify invoices that have payment information in them, you must first delete that information from the Superbill or CMS 1500 screens before clicking Update.

Overview Tab

The first screen you see when entering a new invoice or clicking on a given invoice from List View is the Detail screen. This screen is where the most general invoice information is kept.

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This screen is broken up into **Patient**, **Provider**, and **Invoice**, each giving general information about the Patient (name, address, contact information); the Provider of services; and general $-related invoice information (amount billed, total due, etc).

The **green arrow** next to the Patient ID field will take you to that patient’s detailed record in the Patients section of the database.

The green “@” symbol next to the patient’s email address will send open up your email program and send an email to that person.

The **Case Type** pop-up list under the Provider section on this screen allows you to change the name of the case.

Click on the **Referral Source ID** field to pop up a list from the referral settings (Preferences section of the program), which will auto-enter the referral’s ID and/or NPI numbers onto the CMS 1500 form.

You can also choose the default invoice type (Superbill or CMS form) for the current invoice, which is set to the default given in the Patients/Case Details section of AcuBase for the selected patient, but may be changed for each individual invoice.

The **Date Printed** field shows the last time this invoice was printed.

The **Date E-bill Sent** and **Send Next Batch** fields refer to the Electronic Billing features of AcuBase Pro. This section is only important if you have activated and are using electronic billing (see instructions in the Electronic Billing section of this manual).

The **Send Next Batch** will be set to “No” by default unless you have turned on AcuBase Pro’s electronic billing feature (in Preferences/General tab). When electronic billing is set to “Yes” from Preferences, this field will automatically be set to “Yes” each time a new invoice is created. A “Yes” here indicates that this invoice should be included in the next batch of invoices that are sent in to the billing clearinghouse for electronic processing.
Once a batch has been sent in that includes this invoice, the field will automatically be set back to “No” so that it is not resent in future batches. The date that the invoice was last sent in as part of an E-billing batch will be indicated in the “Date Ebill Sent” field.

If you have modified an invoice after it was sent, and/or have desire to resend an invoice as part of a future E-billing batch for any reason, you may click on “Yes” in the “Send next batch” field to do so.

The Superbill Tab

This is an overview screen of your Superbill for the invoice. This information will flow automatically from the Case Details section of the Patient record if the invoice was created from the Patients section of the program and Case Details were entered there.

The **Print Envelope** button above the diagnosis codes and descriptions will print an envelope with payor/insurance company address information on it.

The **Create Soap note** button will bring you to the Soap notes for that patient.

The top of the screen shows **Diagnosis codes** and descriptions. Clicking on either field shows a pop-up list of all of the Diagnoses selected with a check box next to it in the Preferences/Billing Codes section of the program. You may start typing the code number or name to go directly to it in the list. Selecting the code number will only put the code in without the description, but selecting from the diagnosis description field will also insert the code. You may also hit the “Esc” key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other diagnosis which may not already be on the list. Up to four diagnoses may already be entered here from the diagnoses you had previously entered in the Diagnoses section of the Cases tab screen. These diagnoses will appear on superbills as well as on the CMS 1500 form line 21.

The **Printed Comments** field will allow you to print whatever comments you wish on the superbill invoice. For non-printing comments, use the General Comments field on the Detail/Invoice tab.

Next is the **Procedures** section. You may enter up to six treatments here.
Enter the date of each procedure by clicking on the “Date of Service” field. When you tab over to the Procedure Description field, you will see a pop-up list taken from the Procedures list in the AcuBase Pro Preferences. Like the Diagnoses pop-ups above, the list of procedures is alphabetical. When you select a code, the corresponding diagnosis description, if any, is automatically entered, along with any price or tax you have set up.

You may skip through this list when it pops up by typing the first few characters of a given procedure. You may also hit the “Esc” key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other procedure which may not already be on the list.

You may delete any line by clicking on the small trash (Delete) icon at the right end of each line.

The next section, below the procedures entry, is **Products**. This section is available only on the Superbill, and is for products that are sold to patients. Click in the **Product ID** field to see a pop-up list of all available products in the Inventory database. Select the one you want to auto-fill the other fields, and enter the amount (quantity) for each item.
You may skip through this list when it pops up by typing the first few characters of a given product. You may also hit the “Esc” key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other product that may not already be in inventory. To add new products to the pop-up list, do so from the Inventory database. You may also change the price of a given item, even when the price you have in Inventory for the item has already populated the “price” field, by simply clicking on the price and changing it.

Note that your “amounts” for each item must be consistent with the measurements used in the Inventory database. For example, if you buy an herb by the pound, and then sell some of that herb to a patient, it is assumed that you are selling it by the pound! This is the only way that AcuBase can accurately keep track of how much of a given item you have sold since last stocking it in inventory.)

Like the Procedures section before it, you may delete any line by clickingon the trash (Delete) icon at the right end of each line.

CMS 1500

The next section in the Invoices screens is the CMS 1500 tab. Information entered here goes onto the CMS form.

The **Align CMS 1500** button helps you to align the CMS forms with your specific printer. AcuBase is designed to get all text within 1/32-inch of perfect.

Note that insurance companies tend to care only that they can tell the intent of the form, which is another way of saying that the printout onto a CMS form does not have to be exact—just close enough so that a reasonable person (or computer) could tell which fields you intended to fill.

To align AcuBase Pro's CMS printing with the CMS forms inserted into your printer, start by printing a CMS 1500 form from the computer, and measure how far off the print job may be (whether or not the fields print within the appropriate boxes). Then click on the **Align CMS 1500** button to bring up the CMS 1500 Alignment screen.
A window will appear that says, **To align the CMS form for your printer, choose values from 0 to 20**. The default setting is 0:0. Each number equals approximately 1/32 inch". You are then given two fields: an X (Leftright) and a Y (Up-Down). The 0:0 default is set for the upper-left side of the page, and any positive numbers move the form to the right and down, respectively. The default was set for an Epson inkjet printer, and may work for other printers, as well.

You will keep adjusting this setting until the print setting is correct, at which point it will stay the same for subsequent uses of the program unless you change it.

As an example of a typical CMS alignment situation, a new user of AcuBase Pro has created a CMS invoice for a patient and prints it onto a CMS form. It appears to print about 1/2" too far to the left and 1/8" too high on the form. So she clicks on the Align CMS 1500 button and sets the Left/Right field to 4 and the Up/Down field to 2 in an attempt to move the printout down and to the right. Now she prints again, and the printout is high enough, but still too far to the left by about 1/8". So she returns to the Align CMS 1500 button, which is still at 4 (Left/Right) and 2 (Up/Down). She changes the Left/Right field to 6 and, when she prints again, it's nearly perfect.

The **Preview CMS 1500** button will take you to a CMS 1500 form preview screen, which shows a CMS form with all of its fields and a virtual preview of what the current invoice will look like when printed onto a CMS form. If you see a field which has been incorrectly left blank or has information you would like to change, simply close the CMS Preview window or move it out of the way, fix what's wrong in the Invoices section of the program, and then check the Preview again.

The **Create SOAP note** button will bring you to the Patient SOAP note screen.

The **Print Envelope** button will print an envelope with payor/insurance company address information on it.

The top of the screen shows diagnosis codes and descriptions. Clicking on either field shows a pop-up list of all of the Diagnoses you chose in the **Preferences/Billing Codes** section of the program. You may start typing the code number or name to go directly to it in the list. Selecting the code number will only put the code in without the description, but selecting from the diagnosis description field will also insert the code. You may also hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other diagnosis that may not already be on the list.

Up to four diagnoses may already be entered here from the diagnoses you had previously entered in the Diagnoses section of the Cases sub tab screen. These diagnoses will appear on superbills as well as on the CMS 1500 form line 21.

Below the **Diagnosis** section is where you enter procedure/treatment information (CMS Form Box 24 A-J). Here you have up to six lines of billing, just like on the CMS form itself.

Clicking in the gray area above each line will pop up a list field, which has fields in accordance with official guidelines given by the U.S. Center for Medicare and Medicaid Services (CMS) for what that field should have.

Enter the date of each procedure by clicking on the **From –--To** field. Upon clicking on this field, AcuBase auto-enters today's date by default.

Tab through each field and enter data as you see fit. Fields are designed to show CMS-recommended data by default, and any pop-up list may be edited by scrolling to the bottom and selecting "Edit…", or going to that field's related entry in the AcuBase Pro Preferences.

When you tab over to the **Procedure** field, you will see a pop-up list taken from the **Procedures** list in the AcuBase Pro Preferences. (These may be edited from Preferences, in the Billing Codes section.) Like the Diagnoses pop-ups above, the list of procedures is in numeric order. When you select a procedure code, your pre-set price, if any, is automatically entered. You may skip through this list when it pops up by typing the first few characters of a given procedure. You may also hit the "Esc" key on your keyboard or click into the field to make the pop-up list disappear, at which point you may enter any other procedure which may not already be on the list.

You may delete any line by clicking on the small trash can (Delete) icon at the right end of each line.

If you have Outside Lab charges, click on the **+ Lab charges** field at the bottom of this screen to enter them, and click on the **Yes** or **No** button to the right of the field.

The **Balance Due** field on this screen and on the CMS form itself will notinclude any balance related to products placed on the Superbill screen. Products are not included on the CMS form, only procedures, hence the apparent discrepancy in the totals between the Superbill ad CMS 1500 screens.

Note: We have been intentionally vague in the instructions related to filling out the CMS form because there are so many possible "correct" ways to do so. We designed AcuBase Pro in line with the exact *standards given by the CMS on their website, and have enclosed the Adobe Acrobat PDF form we used for that purpose on your AcuBase Pro CD/installation set. Bottom line: It is your responsibility as a practitioner and business person to know how to fill out a CMS form. AcuBase Pro gives you the opportunity to print and manage your billing, but we will not be held responsible for the responses you get from insurance companies or other entities related to your use of the program. If you need to learn how to fill out a CMS form, there are a wealth of courses available to you around the country. We will not respond to tech support calls asking us questions about what data the form should contain.*

The Insurance/Payor 1-3 Tabs

The next available section for detailed invoice information is/are the Insurance/Payor 1-3 tabs. In some cases, a patient may have multiple payors (primary, secondary, or even tertiary) for a given case.

For example, the current case for a patient may be Auto Accident. Their primary payor is another party's auto insurance company. Their secondary, if that does not pay, is their own auto insurance, with their third option being their own medical insurance or even a lawyer.

You can choose between up to three Insurance/Payors for a given invoice, all of which may flow down from a patient's case preferences if those are set up in the **Patients** section of the program. By default, AcuBase Pro assumes you wish to bill the primary payor (Insurance/Payor 1-3 field). To choose the secondary or tertiary, click on "1", "2", or "3" in the **Insurance/Payor** field.

Click on the **Company ID** field to pop up a list of the companies you have set up in **Preferences** under the **Insurance Companies** tab. You may click on an item from your list to auto-fill the fields below. If you do not have any companies listed there, or would like to enter one that is not on the list, simply hit the "Esc" key on your keyboard, or click once in the field to clear it, and then enter the insurance company information you would like.

Below the Payor information is the **Company/Payor Verification** section, where you may enter approved dates, percentage paid, deductible information, etc. for each payor.

The **CMS Form Prefs** tab are meant for information related to this invoice which will go onto a CMS 1500 form. If this information was entered in a patient's **Case Details** section, and you created the invoice from the New Invoice button in the Patients section of the program, that information should appear here automatically. The fields in pink are editable, and editing them here in the **Invoices** section will not affect default entries made in the **Patients** section of the program.

Note that, in fields where check boxes are the norm, only one check box may be checked, and you will need to un-check one box before checking another in a given section. (For instance, if for Sex you have a check in "F", you will need to click on the "F" field first to uncheck it before checking "M".)
Note, too, that the formatting you see in these fields is meant to conform precisely with government mandated CMS form standards, including date formats and the pop-up lists you see.

The Payments Tab

The Payments tab takes you to the **Apply Payments** screen, where you can keep track of anywhere from one to several payments made to the invoice's procedures and/or products.

To apply a payment to a specific procedure or product, put it on the same line as the procedure using the fields in red.

Clicking in the **Date Paid** field will auto-populate with today's date, as well as the **Paid By** and **Amount**. If you change the Amount to less than the Price for that line, the Adjustment field will auto-adjust the difference by default.

The **Paid By** field is a modifiable pop-up list intended to record the method or source of payment. You may select something from the list, or hit the "Esc" key on your keyboard or click into the field to make the popup list disappear, at which point you may enter whatever you like.

To add new items to the pop-up list, scroll to the bottom of the list and select **Edit** If the amount paid is lower than the actual amount of the procedure, use the **Adjustment** field if you wish to write off the difference.

*For example: if you charged an insurance company $45 for myofascial release, but they only paid $35, you may wish to simply write off the $10 difference, in which case you would enter "10" in the **Adjustment** field.*

The **Comments** field is available for every line, and is a place where you may place comments related to that line item.

To record any non-line item kind of payment (such as a lump-sum payment from the patient, a co-pay, etc.), go to the bottom of the list for either **Procedures** or **Products** and fill in the payment in the blank space provided below the last procedure, recording only the "Date Paid," "Paid By," "Amount Paid," and "Adjustment" fields.

Like the other sections before it, you may delete any payment entry information by clicking on the small trash (Delete) icon at the right end of each line. This will only delete payment information, not procedure or product information.

The final field on the Payment Entry screen is the **Comments** field. Enter any notes that would like to have attached to this invoice. These notes will show up on the printed Superbill invoice.

There are two other ways to apply payments:

1. Use the **apply lump sum payment** button for the invoices that get paid entirely the day of the visit. When you click on the button, you will be prompted to enter

the **Date Paid** and **Paid By**. The program will then assign the date and payment to all lines of the invoice.

2. The **show credits** button is used when patients pay a lump sum for several treatments. Click **show credits** and enter the amount purchased. Click Continue. All invoices with outstanding balances will reflect a button on top of the screen with the amount of credit available. Click the **apply credits** button to apply payments from the credit button to the invoice.

Creating a New Invoice

When creating a new invoice, you will be taken to a blank **Detail/Invoices** screen. If you wish to assign this invoice to a patient from the Patient database, click on **the Patient ID** field (next to the green arrow) to pop up a list of all available patients.

Once you have chosen a patient from the list, only the patient's basic information will show up (name, address, phone, provider). Click on the **Update** button on the top-right side of the screen if you wish to also bring in that patient's default case and billing details.

When it comes to creating new invoices for existing patients in AcuBase, we recommend you go to that patient's record in the **Patient** database and select the **New Invoice** button. That way, all default invoice entries (for superbills, CMS forms, etc.) are entered by default, and you are taken directly to the **Superbill** or **CMS 1500** entry tab, depending upon the default invoice selected for that patient's current case.

The invoices section is separated out from the Patient section in order that you may create invoices that are not associated with patients (such as the odd person who comes in to buy a product and is not a patient)—that way you do not have to create a patient record in order to create an invoice.

Creating CMS Forms from Superbills and Vice-Versa

If you wish to create a CMS 1500 from a previous Superbill (or vice-versa), it's as simple as a click of a button. Every invoice is in fact both a Superbill and a CMS invoice.

Just click on the **Superbill** or **CMS 1500** tab to view each respective form for the invoice, and print whichever you like. Situations may arise where you have a patient whose insurance you bill (on a CMS 1500 form), but they also buy products from you.

So you may fill out the CMS 1500 tab, then switch to the Superbill tab to enter products. You'll see that the procedures on the Superbill tab have already been entered (from your CMS 1500 screen), and all you need to do is add the products. Perhaps they pay you for the products, which you enter on the Payments tab, and then you print a Superbill for them as a receipt, and a CMS 1500 form to send in to the insurance company—all are the same invoice in AcuBase.

Because products cannot be shown on CMS forms, product totals are not included there, but they are included on the **Detail/Invoice** tab for invoice totals.

Getting Help

To get help from any screen, simply click on the **?** button for that screen. You will be taken to context-sensitive help (help specific to the screen you were looking at) which contains relevant information from this user's manual. Smaller help buttons on individual screens will take you to more specific help for those items they refer to.

Chapter 7: Electronic Billing with AcuBase Pro

The electronic billing capabilities of AcuBase Pro represent some of the many ways that the program can grow along with your practice. Once the initial set-up is completed, you will soon find your practice realizing the great benefits of billing electronically. These benefits include:

- Greatly reduced invoice processing time on your end
- Faster payment from insurance companies
- Monetary savings with the elimination of envelopes, paper, stamps
- Saving of personnel costs with the elimination of the need to print, stamp, and send out claims
- Compliance with new Health Insurance Portability and Accountability Act (HIPAA) regulations

About Electronic Billing (E-billing)

Electronic billing is fast becoming *the* standard way of submitting medical claims. In fact, by 2003, the Health Insurance Portability and Accountability Act of 1996 (HIPAA) required that all medical insurance entities be capable of receiving and processing electronic claims.

The current, standard way of submitting claims is to print each invoice onto a CMS 1500 form or superbill and submit each through the mail or by fax to the appropriate insurance company associated with each patient.

With electronic billing, you prepare claims within AcuBase Pro the same way you always do as if you are planning to send them through regular mail. The difference comes when it is time to submit the claims.

Instead of printing up each claim, putting it into an envelope, and sending it off by snail mail, you leave the invoice (claim) unprinted. You then instruct AcuBase Pro to create a “batch” file that has all of the claims in it. This is also likened to “printing to a file”--creating a file with all of the current invoices in them (instead of printing them to paper). It is called a “batch” file because it usually contains more than one invoice for more than one patient.

Next, this batch file is sent through the Internet to a billing clearinghouse, where it is automatically opened, and the data for each invoice is sent electronically to each individual insurance company. The billing clearinghouse is an outside company that does all of the processing for you, and usually bills at a monthly rate depending upon the size and nature of your practice. (A multiple-provider office or billing service will obviously require more processing than a part-time, single provider practice.)

Some of the great advantages of using electronic billing include getting paid a lot faster; saving the time, money, and equipment required to print and mail out claims; and instant reporting. The billing clearinghouse will usually give you a report related to the batch you have sent them within 24 hours detailing if certain data was missing from certain claims, if the processing went through without errors, etc. All that you need are a connection to the Internet, a billing clearinghouse, and AcuBase Pro.

After successful electronic claim submission, you will often get paid by the insurance company up to 90% faster than through paper claims that you snail mailed.

Setting Up and Using Electronic Billing in AcuBase Pro

Using electronic billing in AcuBase involves a few simple steps:

1. Setting up a relationship with a billing clearinghouse;

2. Setting the **Preferences** in AcuBase Pro for E-billing; and

3. Using AcuBase Pro and the Internet to submit claims to the billing clearinghouse.

Let's go through these steps one at a time:

1. Setting up a Relationship with a Billing Clearinghouse.

As stated above, instead of printing out your invoices/claims, you will submit them in a file through the Internet to a billing clearinghouse. The clearinghouse will then open this file and submit each invoice individually, electronically, to each insurance company. AcuBase Pro's billing system creates a batch file designed to be submitted to a billing clearinghouse. The file is in a *.txt (text) format, and appears the same as if it were printed onto a CMS form. (This is often called a "print to file.")

Innumerable billing clearinghouses are able to accept this format for electronic billing. A few companies that we have tested AcuBase Pro with include the following, who may be contacted in order to set up electronic billing services:

Apex EDI
Web: http://www.apexedi.com
Email: info@apexedi.com
Phone: (801) 642-0300

- Office Ally

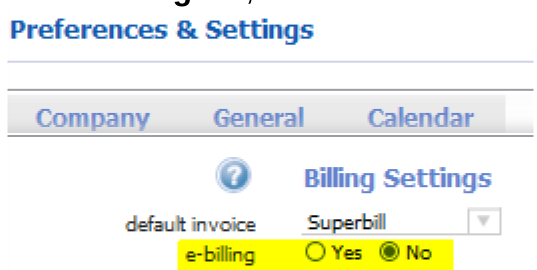
Web: http://www.officeally.com
Email: info@officeally.com
Phone: (949) 464-9129

- Free Claims
  Web: http://www.freeclaims.com
  Email: sales@anvicare.com
  Phone: (281) 325-0208

2. Setting The Preferences In AcuBase Pro For E-billing

Once you have established a relationship with a clearinghouse and have a user name and password provided by them, you will need to let AcuBase Pro know that you would like to use its electronic billing features.

To do this, simply go to the **Preferences** section (little wrench icon on top-right side of any screen), go to the **General Billing** tab, and set the **E-bill** setting to **Yes.**



Once E-billing is set to Yes, the electronic billing section on the **Overview** tab of each invoice screen (the **Send Next Batch** field) will also be set to "Yes" each time you create a new invoice .

3. Using AcuBase Pro and the Internet to Submit Claims to the Billing Clearinghouse

Now that you have a relationship with a clearinghouse, a name and password for submitting claims through their secure website (given by the clearinghouse), and have turned on the E-billing features in AcuBase Pro, you are ready to do electronic billing. Doing E-billing is a matter of A-B-C:

A. Do your billing the way you always do. Now that E-billing has been activated within the program, each time you create a new invoice, the **Send Next Batch?** field in the **Invoice Details** screen is automatically set to **Yes.**

When you have finished entering each invoice, you do not need to print it unless you wish to do so for your reference, as the claim will be submitted electronically.

B. Create a batch file to send all of the current, unbilled claims to the clearinghouse.
Assuming that you are doing billing for several different patients and perhaps several different patient visits, you would normally wait until you have many claims to submit.

Note: How many claims you "save up" to bill is up to you, and may depend upon the volume of your clinic. If you see at least 10 people per day, we recommend submitting at the end of each day. If you have a lower volume business, you may wish to submit at the end of each week.

Once you have prepared your billing to be submitted, rather than printing the invoices out, you will prepare an E-billing batch or batch file by clicking on the **E-billing** button on the top-right side of any Invoices screen. The report will automatically find all of the invoices that have not yet been submitted. (All of the invoices for which the **Send Next Batch** field on the **Invoices Detail** screen are set to "Yes.") If you wish to include any invoices that were previously send in order to resubmit them for any reason, simply go to that invoice, and set this field to "Yes."

At the end of the process of creating the batch file, the file will be named and put on your computer's desktop. This file will contain all of the current bills to be sent to the insurance companies.

Note: The file name given must be unique, so AcuBase gives the file the name "AcuBase12345.txt", where "12345" is the current time of the day in seconds. We do this so that, if you create several different batch files, you can always tell which one came first, in what order. Of course, once the file is saved to your desktop you can always name it whatever you wish.

Once you have created a batch file, each invoice that was sent as part of the file will have its **Date Batch Last Sent** field updated with the date you created the batch. This field can be seen in **the Detail/Invoice** screen. AcuBase Pro will also update the **Date Ebill Sent** field for each invoice when a claim has been sent as part of a batch.
In the following step, you will send this file to the billing clearinghouse.

C. Send the new batch file in for electronic processing.
Now that you have created your batch file, you should do the following:

1. Close or minimize AcuBase Pro.
2. Get onto the Internet
3. Go to your clearinghouse's website, login, and follow the steps they gave you to upload the batch file to the clearinghouse's site for processing.

That's it!

Reporting and Status of Electronic Claims

You may access status and/or error reports related to batch files you have sent in to your clearinghouse by going to their website, logging in, and selecting their "Reports" link. Any issues with your clearinghouse's reporting or claims submission processes should be addressed to them directly.

Trigram Software does not deal directly with the clearinghouses, and will not give technical support related to issues with clearinghouses.

Reports related to the invoices themselves may be run like any other billing report by clicking on the **Reports** tab from within AcuBase Pro.

Chapter 8: Using the Inventory Tab

The Inventory tab is where you go to view all inventory-related information for your practice. Upon clicking on **Inventory**, you are taken directly to the List View of the Inventory database. At this point, all of the inventoried items in the database are presented in order of their Product Names.

Each screen in Inventory has the same buttons at the top: **Search**, **Show All**, **New Product**, **Delete Product**, and the standard navigational tabs found throughout the rest of AcuBase Pro.

Viewing the Inventory List

When you first click on the **Inventory** tab from anywhere in AcuBase Pro, you begin at the Inventory List (List View). You may always return to List View from Form (Detail) View by clicking on the List View icon on the very top of the screen (two buttons to the right of the Calendar tab).

The list is sorted by **product name** but you can choose to sort any of the fields by clicking on the field name.

You may delete an item by clicking on the trash (Delete) icon to the far right of the item's line.

Viewing Inventory Item Details

Upon clicking on any item's blue underlined name from the Inventory List you will be taken to the detailed view (Form View) for that item. From the detailed view, you may move forward or backward one item at a time by clicking/turning the pages on the book icon on the far left side of the screen.

Two additional tabs give the detailed view for each inventory item: **Product & Inventory Info**, and **Additional Info**.

The Product & Inventory Info tab shows by default when clicking on an item from the Inventory List View, and gives most of the detail you need about the item. The Additional info tab is where you may keep inventory totals, notes and descriptions and photos/files related to the **Product**.

Product & Inventory Info Tab

AcuBase Pro allows for a very detailed and flexible accounting of inventory items. To do so, each item in inventory has several fields in its detailed view, described as follows:

Product / Inventory Information

Product ID: Every record requires a unique Product ID, or product identification number, which is assigned by the program and is not modifiable by the user. This field helps AcuBase Pro index each record, which is important when it comes time to bill for products.

Product Name: This is a short name for the item you are inventorying.

Examples of Product Names might be "Carbo 1.5 inch needles" or "St. John's Wort 90 Tabs."

Cost /Each, **Retail Price (Sold At),** and **Tax (on Superbill):** Enter the cost to you when you buy this item (cost/each) and the amount that you charge for this item (retail price (sold at)) into the appropriate fields. All of these fields are very important for reporting, and the retail price shows up on invoices for that item. You can always modify the cost on a per-sale basis on a given invoice.

When you add a new record to the Inventory database, this tax field autofills with the tax rate you entered for Products in the General Settings section of the AcuBase Pro Preferences (wrench icon at top of screen).

You can reset thus amount on this screen on a per-item basis if you wish, and it reflects as tax added to this item's retail price when you sell to a patient on a Superbill invoice.

Name on Superbill: This field shows the name of the item as it will appear on a patient's invoice. This field will default to showing the same name as the **Product Name** field. This field must be unique from other entries in the database, so, if you have multiple database entries for a given product.

For Example: one entry of a supplement with 120 tablets, and another of the same supplement with 300 tablets, you should name each something unique, such as "Patent Formula 300 tabs" and/or "Patent Formula 120 tabs." This way, you can differentiate the two entries when filling out the patient's invoice.

Category: This is a one- or two-word description of the class of the item you are inventorying. Examples included with AcuBase Pro are needles, herbs, formulas, and miscellaneous. You can edit these items or add your own by going to **Edit** (an option at the bottom of the pop-up list when you click on the Category field).

Purchased by the…: This field reflects the units that the item is bought by.

For example: when you buy 1.5 inch needles, you would probably buy them by the box, so you would put "box(es)" in this field. For herbs, you may buy them by the ounce(s) or pound(s), so you would select that. Like the Category field, you may modify and/or add to these values by selecting "Edit…" (an option at the bottom of the pop-up list when you click on the Purchased by the… field).

Description: Enter a full description of the item (as long as you would like) in this field, and/or any significant details related to it.

Max. Amount to Keep on Hand: This is where you enter the amount of this item that you would ultimately like to keep in stock when you have all that you need. In other words, if you like to keep 5 boxes of needles in stock, but no more, then you'd want to enter "5" into this field. For each new record that is created, AcuBase auto-sets this field to 5.

Min. Number to Keep on Hand: This is where you enter the minimum amount of this item that you would ultimately like to keep in stock before triggering a need to buy more. AcuBase Pro uses this field whencalculating the amount of an item that is open to buy by subtracting the amount you have on hand from the minimum number to keep on hand.

Standard Reorder Qty: This is number of this item you normally want to reorder each time you place an order.

Storage Locaton: This is where in your office (or outside of it) one may actually find the current product when it is stocked.

Adjustments / Purchased By the Clinic

The Adjustments area is where you go to keep track of all changes to inventory not accounted for on invoices. For instance, every time you buy more of an item, you would add the amount bought here, with perhaps a comment "Purchased Additional Inventory." If you gave a few items away, you may wish to note that here as well, but enter the number as a negative, since the items were taken out of inventory.

Again, any adjustment to the amount of inventory you have in stock that has not been put onto a Superbill should appear here.

Inventory Totals

These fields are calculations based on the fields above them, and the amount sold (based on your invoices). These fields are not modifiable.

Total Quantity Adjusted: The total of all adjustments from the Adjustments portal above it.

Total Quantity Sold: This field connects to your patient invoices to determine the total amount of a given item you have sold. This field keeps adding up, and does not reset each time you add to inventory.

Amount On Hand: This is how much you have in stock based on how much you have stocked/adjusted minus how much you have sold of a given item.

Open to Buy: This field subtracts the minimum amount of an item you want to keep on hand from the amounts actually stocked and sold to determine if and how much of an item is open to buy.

Vendor Information

The fields on this screen relate to the vendor of this item to you. Start by clicking on the **Vendor ID** field. This will give you a pop-up list of all vendors in the Vendor Information database. If the supplier of this item is already in the list, select their name, and their information will automatically appear in the fields below. If they are not in the list, you will need to add them into the **Vendors** section of **Settings**. You may add to or edit this list by clicking on the **Add New Vendor to List** link to the right of the Vendor ID field

The Additional Info Tab

The Additional Info tab is where you can add photos and files, see inventory totals and add additional Notes or descriptions

.

Associated Photos / Files

You may also enter up to four pictures or files to associate with each inventory item. So if you have a picture or Word document that has further detailed information about the item, you may click to add each and attach it to the inventory item.

This is useful if you have materials you give out to patients or others related to the item (such as use or preparation instructions, interaction warnings, detailed product information, etc.).

Once attached, clicking on the image of the picture or file will open it and enlarge it for viewing.

Note that Word, Excel, Adobe PDF, and other non-photo documents will not be found if they are moved around or off of your computer once they have been attached. Documents attached that were created in programs that are not on the computer that AcuBase Pro is on will not open without the program they were created in.

Inventory Totals

These fields are the same as those on the Product & Inventory Info tab screen, and are here for your reference when ordering.

Notes

Use the Notes field to enter any general information about this vendor and your relationship with them. Information entered here will be entered intothe Comments field for this vendor in the Vendors database, as well.

Deleting Items in the Inventory Database

To delete items in the Inventory database, simply click on the **Delete Product** button. You will be given the option of canceling the delete process before it is finished. Once you confirm the deletion, ***you will not be able to recover that record*.** AcuBase Pro automatically saves changes as they are made, so deletions are permanent. Always keep backups of all of your data!

Finding Records

To perform a “find,” simply click on the **Search** button from any given layout. A blank screen will appear that shows the fields that you can find by. Simply enter the information (or any part of it) into the appropriate fields that you would like to find, and click on the “Continue” button on the left side of the screen. If only one record was found, that one record will be shown in Form View. If more than one record is found, you will be taken directly to View as List to see a list of the found records.

Note: Like any other find request, the Search/Find feature in the Inventory database follows the rules of a find given in Chapter 2, under “Finding Records.” Refer to that section for more detailed information on finding records.

Show All Items

Once you have done a Search / Find for a set of records, only those records are available to view from that point forward. To bring all items in the Inventory database back into the “found set,” click on the “Show All” button (available from any layout).

Getting Help

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To get help from any screen, simply click on the “?” button. You will be taken to context-sensitive help (help specific to the screen you were looking at), which contains relevant information from this user’s manual.

Chapter 9: Running Reports

Upon clicking the Reports tab from anywhere in AcuBase Pro, you will be taken to the main Reports window. Reports are a way of conveying the state of and/or printing out detailed information related to your practice.

To run a report from the **Reports** tab, find the report name you wish to run from the list, click on the report name, which will show as highlighted (or click a second time to un-highlight a line); and then click on the **Run Selected Report** button at the bottom of the screen.

For information on what is summarized in each report, you may place the mouse arrow over any report name and a detailed description will appear.

Creating Reports in AcuBase

1. Naming the Report

Once you have clicked on the **Run Selected Report** button, most reports will begin processing by taking you to the Report Title screen, where the name of the report appears and may be modified as you wish. **Click OK** to continue, or **Cancel** to cancel the report.

Note that this is the only place from which you may cancel the report. After clicking OK, you will need to click "Cancel" on the print screens to keep it from printing.

2. Finding Appropriate Records

After you have selected the report name and clicked the "OK" button, you will be taken to a screen where you can refine your search for the records you will be reporting on. Any number of fields may be used to perform a **Find** here. If you wish to print a report reflecting data related to all of your records, simply click on the **Continue** button on the left side of the screen, without entering any data in the fields.
If you do wish to find and report on only certain records (say, only a given patient, or only a give billing date range), you can enter that on the Find screen, and then click Continue on the left side of the screen to continue.

There are specific characters necessary in order to find a range, greater than, less than, etc. See the **To Find Records** section of the **Getting Started with AcuBase** chapter in this user's manual for details on how to refine your searches.

3. Printing Your Report

Once the Find has been completed, you will see a print preview of you report before it is printed. If you like the way it looks, click **Continue** on the left side of the screen to go to the print dialog windows for your printer. If the report does not look right or you would not like to print it, simply click **Continue** on the print preview screen, and then click **Cancel** when your printer's print dialog window appears.

Important note about printing reports: On some occasions, the printpreview of a report may look good, but when you go to print, the printedversion only prints one line of data in the report. If this happens, go toprint the report again and, when your printer's print dialog window comesup (the first window after the print preview), make sure that **Print:Records Being Browsed** is selected, rather than **Print: Current Record**.

You may also occasionally see a preview that has the wrong paper size selected. From the Preview screen you may always go to File/Page Setup to change printer and paper settings before the report prints.

Report Details

Reports are divided up by the section of the program that they related to. Each section (Patients, Invoices, Inventory, etc.) will show a different Find windows depending upon the kind of report being run. A Patient-related report, for instance, will always go to a blank Patient entry screen to find records for the report. Inventory reports let you Find records from the Inventory screens you are already familiar with.

When you click the green arrow beside the report name, a description of the report is shown in the box to the right.

Appendix A: Frequently Asked Questions

Over the years, we have had a number of the same questions asked of us repeatedly. What follows are some answers to the most frequently asked questions, as well as a number of answers to questions we anticipate receiving with this new version of AcuBase Pro.

Q: I know that I need to keep a backup of my AcuBase Pro data current at all times. How do I make a backup?

A: Clicking on the **Backup** button in the **Settings/General** tab makes animmediate backup of the AcuBase file to the Backup folder within the AcuBase directory on the computer. The date and time of the last backup is recorded here as well. Each time you close the program, AcuBase will ask if you wish to make a backup. We recommend that you further back up the whole AcuBase folder onto a CD, Zip disk, or some other removable media so that, if something goes wrong with your computer, you can always load the backed-up program onto another machine without losing data. Simply backing up the AcuBase Pro folder/directory (with the program CLOSED) will save all data related to the program. Mac users, copy the AcuBase Pro folder from your hard drive to your backup media. PC users, back up the AcuBase directory, located at C:\program files\trigram software\AcuBase (where "C:" equals the letter of your hard drive).

It is *essential* that you keep a backup of all files related to AcuBase, as well as any and all other mission-critical files that you use. This is your responsibility as a businessperson and a prudent computer user. The makers of AcuBase Pro **ARE NOT RESPONSIBLE FOR DATA LOST WHEN NO RECENT BACKUP HAS BEEN MADE**.

Q: I have a really old / really new computer. Will AcuBase Pro work with my computer and operating system?

A: Please read the minimum system requirements in Chapter 1 (Installation) to see if your computer meets these requirements.

Q: Why aren't all of the menu items for each screen explained in the user's manual or anywhere else?

A: AcuBase Pro was created in FileMaker Pro 12. As a result, users have access to many of the menu items at the top of the screen that FileMaker provides. We highly recommend that AcuBase Pro users stick to the buttons at the top of each screen which have been provided. Each button on a given screen has scripts attached to it that make sure that the integrity of the database is kept consistent. The one exception to this suggestion is the Commands menu. The Commands menu has a list of commands for which keyboard shortcuts may be used. These shortcuts, once learned, may provide faster navigation through the program without the necessity of using the mouse.

Q: Can I import data from other programs, or export data? It appears that there is an import and export capability in the program.

A: Trigram Software will not support importing or exporting to or from AcuBase Pro, except within the context of upgrading from a previous version of AcuBase Pro. We highly recommend that you do NOT attempt to import or export records to or from AcuBase Pro. AcuBase Pro is a relational database, which means, among other things, that the information you are viewing at any one time may actually be kept in one of many different related database files that you never see. AcuBase Pro is NOT designed to export to QuickBooks or any other program. You may, however, copy data or a large block of text from one field or document, and paste it into a given field within AcuBase Pro. (For instance, if you have written an intake for a given patient in Microsoft Word, you may copy it there, and paste it into a new Intake [under the “Intakes and Activities tab”] within that patient’s record in AcuBase Pro.)

Q: How do I upgrade from an older version of AcuBase to AcuBase Pro?

A: If you own AcuBase 2.002 or earlier, you will not be able to upgrade your data to this version of AcuBase Pro. The reason for this is that the Pro version was created in a newer, faster database engine that is not compatible with the engine used to run older versions.

If you have been running AcuBase 2.003 or later, please contact us and let us know wish to upgrade. We will walk you through the process.

Q: Why do my reports or print jobs sometimes look fine in Preview mode, but then only print one record or one line from my printer?
A: On some occasions, the print preview of a report may look good, but when you go to print, the printed version only prints one line of data in the report. If this happens, go to print the report again and, when your printer’s print dialog window comes up (the first window after the print preview), make sure that “Print: Records Being Browsed” is selected, rather than “Print: Current Record.”

Q: Why is it that, when printing superbills or CMS forms for some ofmy patients, the provider name and clinic information (CMS box 33) do not show up? I know that I entered this information correctly into the Preferences section of AcuBase Pro!
A: This issue often comes up when patient information has been entered prior to setting up provider preference information. Because each patient is assigned a provider as soon as the patient is entered into the database, if the provider preferences were not entered *before* the patient was put into the database (or were changed after the patient was put in), the correct provider information will not show up in box 33 of the CMS 1500

form. You will have to go back and reassign the correct provider to each patient in the database to fix this.
To do this, simply go to the **Patient Information** tab for the patient in question, click on the **Provider** field at the top of the screen, and pick a provider OTHER than the correct one. Click anywhere to set and save this incorrect provider. Then click in the field again, and pick the correct provider for the patient. Doing this resets the patient record to the correct provider. If you are seeing this issue come up repeatedly with many different patient bills, you may wish to do a **Replace All** for the provider field so that you do not have to manually reassign the provider for each patient in the database individually. To do this, see the instructions on the **Replace All** feature discussed in Chapter 2.

Q: How do I duplicate a patient record or an invoice?
A: Unfortunately, even though you may go to the Records menu and select **Duplicate Record** we HIGHLY recommend you do not do this. Because AcuBase Pro is a relational database, duplicating a patient record also duplicates its internal (unique) reference information, and hence all related information (such as activities, invoices, etc.). This means that any changes you make to the newly duplicated record will also be made to the old record, and you will essentially have two duplicate records, neither of which you can modify without the modification happening in both the old and the new records. (Make sense?) Further, if you do duplicate a record, and then try to delete it, you will delete both the newly duplicated AND the original record!

Instead of duplicating, take the time to create a new patient record or invoice. It may seem time-consuming, but it will actually save you time over failed file duplication. Also remember to stick to the buttons on the top of each screen, using only the Commands menu and File menu as necessary.

Q: Does AcuBase Pro have a Spelling Dictionary?
A: Funny you should ask… Why, yes, it does! AcuBase Pro users may check the spelling of any record by going to the **Edit** menu, and selecting **Spelling**. The default dictionary is U.S. English. Select **Check Record** to check only the record you are viewing, or **Check All** to check all records in the database you are looking at. You can also select the option under Edit / Spelling of “Select Dictionaries…” Further, words not recognized in the dictionary are underlined in red. Right-click on those words, go to Suggested Spellings, and add or correct the word there.

Q: How can I limit what I find or what I print to a given date range? How can I find all of the records in the database for a given report?
A: A date range is entered as two dates with “…” between them. For example, to find all transaction for the year 2001 only, after you click the “Find” button at the top of the screen, or from the “Find Info for Reports” screen that comes up when you try to create a new report, you would enter “01/01/2001…12/31/2001” [without the quotes] and click the “Find” button.) A special note on the * operator and finding for dates: The best and easiest way to find all records for a given month or year is to find with the *. For instance, if you wish to create a happy birthday letter and find for all people born in the month of September, you would go to Find mode and, in the DOB (Date of Birth) field,

put “9/*/*”. To find all records, after you click the **Search** button at the top of the screen, simply click on the **Find** or **Continue** button without having entered any find criteria.

For more extensive information on all of the different ways you can Find records, see *“To Find Records”* section of this user manual’s *Chapter 2: Getting Started with AcuBase Pro.*

Q: What is the fastest, easiest way to use this program in a way that saves me time and makes the most of the program?
A: Start by reading through the AcuBase Pro documentation. Follow along in the program and play around a bit before getting too serious in order to get comfortable.

When you are ready to use the program, start by going to the **Settings / Preferences** section (the wrench icon on the top-left side of every screen) and fill out as much Preference information as you are able. You may always go back and change these settings.

Jump in! And remember that your program will expire in 30 days if youare an unlicensed user. Contact Trigram Software when you are ready to purchase a license, or to renew your license at the end of each 12-month period. Once the program is licensed, all data already entered into the program will continue to be accessible--you do not need to reinstall anything. To purchase a license, go to Trigram Software's website at http://www.trigram.com and follow the links to Purchase; call us at 1-888-4ACUBASE; or e-mail support@trigram.com.

Once you’re using the program, you’ll find that the best way to go about it is to start by entering a given patient’s information as completely as possible, including all billing information, CMS form information, default invoice setup, etc. Once this has been done, assuming you have been complete in your patient data entry, simply clicking on “New Invoice” from that patient’s Patient screen will do everything for you.
Creating invoices can be a one-click process.

Appendix B: Technical Support

Most AcuBase Pro help is available through the program itself by using the **?** button located on almost every screen and in this manual. You may also wish to check the Trigram Software support page at **http://www.trigram.com/support**, or contact Trigram Software Monday through Friday from 9 AM to 5 PM US Pacific Time. Phone U.S. toll-free 1-888-4ACUBASE (888-422-8227), or e-mail us at **support@trigram.com**.

Please note that:

- Technical support does not include help related to how to do your billing, i.e., which codes are appropriate to use, how many procedures to bill, etc.

- If you choose to use a password and later forget it and/or get locked out of the program for any reason, Trigram Software will charge you a fee to unlock your program and reset the password.

- Trigram Software support will NOT assist you in the event that you attempt to change default layouts and/or lose data after modifying the databases in FileMaker. If you decide to modify these files, it is assumed that you know and understand the intricacies of FileMaker, and you do so at your own risk.

- If you are using electronic billing features and have any issues related to the billing clearinghouse's reporting or claims submission processes, these issues should be handled by the clearinghouse directly.

- If you are using a networked version of AcuBase Pro, we will not be responsible for the function or repair of your network infrastructure, and/or getting your program to broadcast over a network if you have not already established that the network is otherwise functional.