



Medtech








Proudly Presents:

Visual Medtech

Welcome to Medtech! (Doctor's Office - (314) 555-1212)

Welcome to Medtech,
Mary!

Accounts [F2] Charges [F3] Payments [F4] Ledger [F5] Scheduler [F6] Daily Ledger [F8] Help [F1]

Business Date
2/27/2006
12:39 PM

Log Off

Our flagship product, *Medtech*, is a comprehensive *Medical Practice Management System* that offers a complete Software Solution to Patient Recordkeeping, Appointment Scheduling, Claims Processing, Electronic Claims Submission, Receivables Management, Patient Billing and EMR

Conversion from your existing system

No partial conversions, no running two systems for an indefinite time, no keying from reports.

Add/Edit/Delete charges and payments from any batch at any time

You need to change a CPT code from a claim two weeks ago? No problem. Pull up the charge on screen and make whichever changes you desire. No more adjusting off the whole charge and entering it again.

Charges - Batch Totals

Business Date of: 06/06/06

Fee Slips entered via Charges:

- Number of Fee Slips: 11
- Number of Services: 21
- Total Charges: 13,571.00

Payments entered via Payments:

- Number of Payments: 17
- Number of Pmts. By Svc: 13

Totals from Charges and Payments:

- Payments: 437.00
- + Copays: .00
- = Total Received: 437.00

Adjustments from Charges and Payments:

- Standard Adjustments: 36.00
- + Miscellaneous Adjts.: .00
- = Total Adjustments: 36.00

Buttons: Edit Existing Charges, Enter New Charges, Done

Keep multiple batches open simultaneously

You have transactions for one day but can't enter them until the previous day is closed? No problem anymore. Change the date, enter your charges/payments for that date. When you receive the transactions for the previous day, change the date, and enter those transactions.

Customize your color schemes

The color options could occupy your time for weeks. Fortunately, we have some standard schemes already defined. But, you're free to customize as you wish. And,

Screen Color Selection

Custom Color Configuration

By clicking on the Elements shown, you can change the colors used by the system. You can also Right-Click each individual Function Button to set each one to a different color.

Use Theme: (None)

Click here to set Outer Box Background Color

Click here to set Outer Box Text Color

Click here to set Outer Box Highlight Color (ALT-F3)

Click here to set Outer Data Boxes Bkgd. Color

Click here to set Outer Data Boxes Text Color

Click here to set Highlight Color

Click here to set Inner Box Background Color

Click here to set Inner Box Text Color

Click here to set Inner Box Highlight Color

Click here to set Inner Data Boxes Bkgd. Color

Click here to set Inner Data Boxes Text Color

-Click below to set Bkgd. -Click below to set Text

Grid Heading Lines Grid Heading Lines

Grid Field Grid Field

Grid Field HiLite Grid Field HiLite

Ledger Charge Ledger Charge

Ledger Chg. HiLite Ledger Chg. HiLite

Ledger Ins. Pmt. Ledger Ins. Pmt.

Ledger Ins. HiLite Ledger Ins. HiLite

Ledger RP Pmt. Ledger RP Pmt.

Ledger RP HiLite Ledger RP HiLite

Raise Current Grid Data Field

Animate Eying Caduceus

Animate Other Images

Color of Disabled Function Key (Ctrl-H)

each user in the system can choose his/her own colors! You can also select a different color for charges, insurance payments, and RP payments in the Ledger screen. A quick glance lets you know what you're viewing.

Keep your hands on the keyboard

Using the mouse is certainly acceptable. However, our system doesn't require you to use the mouse everywhere. Function keys and hot keys are alternatives to constantly using the mouse. Patient information, charges, and payments are keyed more efficiently when your hands remain on the keyboard as opposed to alternating between the keyboard and mouse. The bottom line is the new system offers you a choice.

Patient Doe, John

Last Name: Doe First: John M.I. Suffix Act. #620

Basics RP Info Insurance Referrals/Medical Appointments

Address: 100 Main Street Suite 105 City: St Louis State: MO Zip: 63113

Home: (314) 111-1212 Work: (314) 111-1313 Cell: (314) 111-1414

DOB: 2/16/1925 Age: 81 Student: Not A Student

Provider: Smith Tom Ref. Provider: Baker Carl

Diag 1: 794.31 Abnormal EKG 2: 307.81 Headache Tension

Next Apt: 01:00p Thursday, June 15 Co-Pay: 20.00

Primary Ins: Medicare Last Bill: RP: Rel. to RP: Self Last DOS: 05/12/2006 First DOS: 11/10/2003

Due From	0-30	31-60	61-90	91-120	Over 120	Total
RP	\$55.00					\$55.00
Insurance	\$197.00					\$197.00

Separate RP from Guarantor

Dad's responsible for the child's insurance. Mom gets the bills after insurance pays. No problem. Setup Dad as the guarantor, setup Mom as the RP.

Patient Doe, Emily

Last Name: Doe First: Emily M.I. Suffix Act. #638

Basics RP Info Insurance Referrals/Medical Appointments

Type	Insurance Name	Address	City	State
PRI	GHP	PO Box 7121	London	KY
SEC				
TER				
PRI*	Medicaid	Pox 5600	Jefferson City	MO

Relation to RP: Self Act #: 638

Last Name: Doe First Name: Emily M.I. Suffix: DOB: 5/21/1947 Age: 59

Address: 100 Main Street Home: (314) 534-1212 Work: () - Mar: Married Sex: M

City: St Louis Cell: () - SSN: 328-40-1000 State: MO Zip: 63107 E-Mail:

Ins. Name: Medicaid Type: PRI* Type: 18 Address: Pox 5600 Phone: Contact: Insur. #: 17476971 Co-pay: Effective Date: 01/01/1900 Ledger Ins. Pmt. Ledger Ins. Pmt. Ledger Ins. HiLite Ledger Ins. HiLite Ledger RP Pmt. Ledger RP Pmt. Ledger RP HiLite Ledger RP HiLite

City: Jefferson City State: MO Zip: 65102 Name: Grp. #: End Date: 05/31/2006

Accept Assignment?

Base RP and Insurance Coverage on "Effective Date"

Your patient switches insurance in January but still has charges outstanding to the previous insurer? No problem. Tell the system when the coverage stops for one insurer (or RP) and when it starts for the next one. The system will take care of the rest from there.

Add more than two insurers

You can now add a third insurer. Just tell the system which insurer and when the effective date is.

Type	Insurance Name	Address	City	State
PRI	Medicare	PO Box 8170	Little Rock	AR
SEC	Medicaid	Pox 5600	Jefferson City	MO
TER	BCBS	PO Box 14882	StLouis	MO

Relation to RP: Self
 Last Name: Doe, First Name: John, M.I., Suffix, Act #: 620
 Address: 100 Main Street, Suite 105, City: St Louis, State: MO, Zip: 63113
 Home: (314) 111-1212, Work: (314) 111-1313, Cell: (314) 111-1414, E-Mail:
 DOB: 2/16/1925, Age: 81, Mar: Unknown, Sex: F, SSN: 111-22-1234
 Ins. Name: BCBS, Type: TER, Address: PO Box 14882, City: StLouis, State: MO, Zip: 63178-4882
 Phone: (314) 923-5000, Insur. #: 12345, Grp. #: 4321, Name:
 Type: 133, Contact: Co-pay: Effective Date: 01/01/2000, End Date:
 Accept Assignment(?):

Assign one RP for multiple patients

One parent is the RP for four children, and each of those four accounts point to the one parent account. The parent won't be listed four, separate times; one time will do. When the parent's address changes? No problem. Change it once on the parent account and all the accounts underneath that parent get the same change.

Relation to RP: CHILD, Effective Date: 1/1/2000, Act #: 620
 Last Name: Doe, First Name: John, M.I., Suffix
 Address: 100 Main Street, Suite 105, City: St Louis, State: MO, Zip: 63113
 Home: (314) 111-1212, Work: (314) 111-1313, Cell: (314) 111-1414, E-Mail:
 DOB: 2/16/1925, Age: 81, Sex: F, Mar: Unknown, SSN: 111-22-1234
 Send Stmt (Q): , Payment Plan (U):

Due For	R/I	0-30	31-60	61-90	91-120	Over 120	Total
Doe, Emily	RP	\$65.00					\$65.00
Doe, John	RP						
Doe, Tommy	INS	\$182.00					\$182.00
	INS	\$55.00					\$55.00
* PATIENT TOTALS FOR Doe, John *							\$120.00
* INSURANCE TOTALS FOR Doe, John *							\$182.00

Assign an unlimited number of account types to a patient

You can have as many account types on a patient as you want. And set them up to display a warning message only on the screens you want to see those messages.

Note Text	Operator	Ac	Ch	P	Ld	Sch
REFERRAL REQUIRED	[mary - 6/16/2006]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SENT TO COLLECTIONS	[mary - 6/16/2006]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Update Patient Information from Charges screen, Payments screen and Ledger screen

You can easily pull up the Patient Information Screen from any of the other major areas.

Enter charges on one screen

No more three and four screens to enter an encounter. No more different entry screen for facility charges. All charges are on one, concise screen.

Charges - Doe John - Fee Slip # 4374
 Last Name: Doe, First: John, M.I., Suffix, Act #: 620
 Fee Slip #: 4374, Responsible Payor: Medicaid, Business Date: 2/12/2006

From	To Date	Service Description	Amount	Diag Mod.	Units
02/12/06	99211	Office Visit Est Level 1 Focus	55.00		1
02/12/06	99212	Office Visit Est Level 2 Expan	65.00		1
02/12/06	99213	Office Visit Est Level 4 Compr	120.00		2
02/12/06	99214	Office Visit Est Comp	150.00		2

Fee Slip Notes		Fee Slip Totals	
	Total	Type	Check #
- Adjustment	390.00		
- Payment			
- Copay	25.00	CHECK	1234
- Later Pmts.	336.00		
+ Cred.Appl.			
= Balance	29.00		

Enter more than six CPT codes at a time

You don't worry about separating the charge, the system will do that if you enter more than six CPT codes at a time.

Access the Fee slip directly

You'll have a shortcut to access a fee slip. Instead of selecting the patient, then scrolling through the service dates until you find the Fee slip you want, just enter the Fee Slip number and you'll go directly to that Fee Slip.

Editing Existing Payments - Doe John- Fee Slip # 4374

Last Name Doe First John M.I. Suffix Act# 620 ABA
 Fee Slip # 4374 Responsible Payor Medicare Business Date 2/27/2006

Service	Service Description	Charged	Paid	Adjustment
99211	Office Visit Est Level 1 Focus	55.00	40.00	5.00
99212	Office Visit Est Level 2 Expan	65.00	50.00	6.00
99213	Office Visit Est Level 4 Compr	120.00	100.00	7.00
99214	Office Visit Est Comp	150.00	120.00	8.00

Fee Slip Notes		Payment Totals	
Payor	Medicare	Prev. Bal.	365.00
- Misc. Adj.		Type	Check #
- Payment	310.00	EOB	54321
- Adjustmt.	26.00	Write-Off	
+ Cr. Appl.			
= Balance	29.00		

Easily view charges, payments, and more

View previous days' charges and payments, modified in the current day's batch, on your trial balance/close day report. This useful tool provides an activity trail for all of the users in the office. It's particularly useful when working the aging report or EOBs; it serves as a checklist to ensure you've fixed all the problems you intended to fix. The totals aren't included in the current day's batch; just a list of the fee slips and payments which were modified in the current day.

Enable the AutoCoverage function

With this enabled, the system will automatically batch claims for you when you make a change to the patient's insurance or change the fee slip. A great time saver and, more importantly, makes sure the correct information gets submitted to the payers in a timely manner.

Assign responsibility automatically

This assignment follows a pattern; First Primary, then Secondary, then Tertiary, then RP. No need to tell the system who's next unless it's something out of the ordinary.

Editing Existing Payments - Doe John- Fee Slip # 4374

Last Name Doe First John M.I. Suffix Act# 620 ABA
 Fee Slip # 4374 Responsible Payor Medicare Business Date 2/27/2006

Service	Service Description	Charged	Paid	Adjustment
99211	Office Visit Est Level 1 Focus	55.00	40.00	5.00
99212	Office Visit Est Level 2 Expan	65.00	50.00	6.00
99213	Office Visit Est Level 4 Compr	120.00	100.00	7.00
99214	Office Visit Est Comp	150.00	120.00	8.00

Changing Who Made the Current Payment on Fee Slip # 4374, Patient Doe John

Balance Due From: RP (Doe John)

Allow Auto-Coverage: Yes

Batched	Name
<input type="checkbox"/>	Medicare
<input type="checkbox"/>	Medicaid
<input type="checkbox"/>	BCBS
<input type="checkbox"/>	Doe John

Balance EOBs using Split Payments

One check split among multiple patients. Split payments keeps track of the check amount to make sure you've posted the amount of the check.

Editing Existing Payments - Doe John- Fee Slip # 4291

Last Name Doe First John M.I. Suffix Act# 620 ABA
 Fee Slip # 4291 Responsible Payor Medicare Business Date 6/12/2006

Service	Service Description	Charged	Paid	Adjustment
99211	Office Visit Est Level 1 Focus	55.00	25.00	7.00

Fee Slip Notes		Payment Totals	
Payor	Medicare	Prev. Bal.	45.00
- Misc. Adj.		Type	Check #
- Payment	25.00	EOB	12345
- Adjustmt.	7.00	Write-Off	
+ Cr. Appl.			
= Balance	13.00		

Split Payment Totals			
Payor	Medicare	# Fee Slips	Type
		3	EOB
Tot. Pmts.	250.50	Tot. Adjs.	75.00
- So Far	75.00	- So Far	37.00
= To Go	175.50	= To Go	38.00

Find charges and payments easily

Robust searching, filtering and sorting options in Ledger allow you to find what you want and hide what you don't want. Hide the paid Fee Slips. Hide the RP responsible Fee Slips. Don't search the whole haystack; go straight to the needle.

Ledger - Doe John- Fee Slip not selected yet

Last Name Doe First John M.I. Suffix Act# 620
 Fee Slip # 4231 Responsible Payer BCBS DOR: 06/15/2006

DOS	FS #	Services	RP	Charges	Pmts	Adjs	Balance
05/12/06	4231	[SP] 99211	3	55.00	35.00	7.00	13.00
04/12/06	4309	99211	3	55.00	0.00	0.00	65.00
02/12/06	4341	99211	2	55.00	0.00	0.00	65.00
02/12/06	4358	[SP] 99211	2	55.00	30.00	20.00	5.00
02/12/06	4366	[SP] 99211	2	55.00	20.00	10.00	25.00
02/12/06	4374	99211; 99212; 99213; R	3	390.00	335.00	26.00	29.00

Choose Selection Method
 Choose what you would like to search for:
 For simple selection, choose one of the following:
 1: All FeeSlips
 2: Open FeeSlips only
 3: Closed FeeSlips only
 4: FeeSlips with Insurance Balance Due
 5: FeeSlips with RP Balance Due
 6: Search all FeeSlips for a specific Check Number
 7: Search all FeeSlips for a specified RP Payment Amount
 8: Search all FeeSlips by Adjustment Type
 9: Search all FeeSlips by Payment Type
 X: I changed my mind, leave Selection Method unchanged.

Your reply: _____

Due From	0-30	31-60	61-90	91-120	Over 120	Total
RP	\$149.00					\$149.00
Insurance	\$153.00					\$153.00

View all RP payments at one time

Ledger gives you the ability to see all of the payments from the RP, including the date and payment amount.

Ledger - Doe Linda- Fee Slip not selected yet

Last Name Doe First Linda M.I. Suffix Act# 3681
 Fee Slip # 4507 Responsible Payer Doe Linda DOR: 06/13/2006

Pay Date	FS #	Payer	Amount	Check #
06/14/06	4382	Doe Linda	25	12345
05/15/06	4408	Doe Linda	95	8765
04/05/06	4390	Doe Linda	21.5	3421

Due From	0-30	31-60	61-90	91-120	Over 120	Total
RP	\$55.00					\$55.00
Insurance	\$30.00	\$15.00	\$33.50			\$78.50

Search for specific check numbers

Many options to find exactly when and where a payment was posted.

Change sort order Easily

Want to sort by DOS instead of Fee Slip number? No problem. Click on DOS. Want to sort on Insurer instead of DOS? No problem. Click on Payer. Use the view that's best for you.

DOS	FS #	Services	RP	Charges	Pmts	Adjs	Balance
05/12/06	4231	[SP] 99211	3	55.00	35.00	7.00	13.00
04/12/06	4309	99211	3	55.00	0.00	0.00	65.00
02/12/06	4341	99211	2	55.00	0.00	0.00	65.00
02/12/06	4358	[SP] 99211	2	55.00	30.00	20.00	5.00
02/12/06	4366	[SP] 99211	2	55.00	20.00	10.00	25.00
02/12/06	4374	99211; 99212; 99213; R	3	390.00	335.00	26.00	29.00

Update Transactions through Ledger

Access any charge or payment through Ledger or access them directly. It's up to you how to do it. But, do it you can.

Ledger - Doe John- Fee Slip # 4374

Last Name Doe First John M.I. Suffix Act# 620
 Fee Slip # 4374 Responsible Payer Medicaid DOR: 06/14/2006

Date	Serv	Description/Payer	Charge	Pmt.	Adj.	Check #
02/12/06	99211	Office Visit Est Level 1 Focus	55.00			
	99212	Office Visit Est Level 2 Expan	65.00			
	99213	Office Visit Est Level 4 Compr	120.00			
	99214	Office Visit Est Comp	150.00			
Copy				25.00		1234
02/27/06	99211	Medicare		40.00	5.00	54321
	99212	Medicare		50.00	6.00	54321
	99213	Medicare		100.00	7.00	54321
	99214	Medicare		120.00	8.00	54321

Fee Slip Notes	Charges	Fee Slip
	380.00	
	- Ins. Paid	310.00
	- Ins. Adj.	26.00
	- RP Paid	25.00
	- Other	
	= Balance	29.00

Issue Refunds/Transfer Credit balances

Ready to get rid of those credit balances? The new system provides two options which will save you time and effort.

Ledger - Doe James- Fee Slip # 4432

Last Name Doe First James M.I. Suffix Act# 3665
 Fee Slip # 4432 Responsible Payer Doe James DOR: 06/15/2006

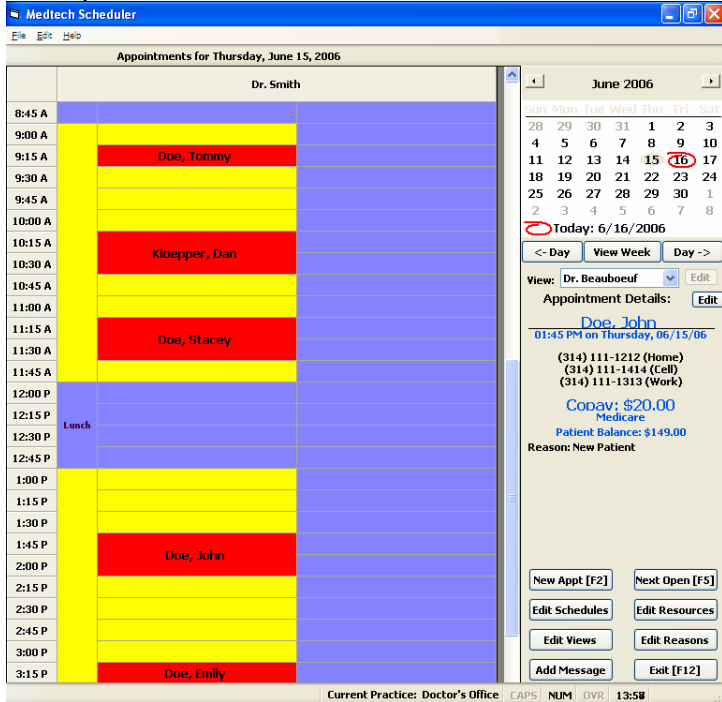
Apply Credit to Fee Slips with RP Balances Due (F12 = Done, Escape = Abort)

Pay	DOS	FS #	Patient Name	Charges	Pmts.+Adjs.	Bal. Due
	05/04/06	4440	Doe James	65.00		65.00
	05/04/06	4457	Doe James	55.00	50.00	5.00
	05/04/06	4465	Doe James	55.00	10.00	45.00

Totals for this Credit			
Original Credit	- Applied to Fee Slips	- Refunded	= Credit Remaining
35.00			35.00

Schedule Resources as well as Providers

Need an appointment in the XRay room at 1:00pm? No problem. Select that resource and schedule the appointment. Resources expand the scheduling opportunities way past just scheduling for a provider.



Define colors for Appointment Reason codes and Appointment Template

Color is powerful. Use this robust feature to make your scheduler visually appealing and, more importantly, acutely focus attention to which times are available and which times have which appointments scheduled.

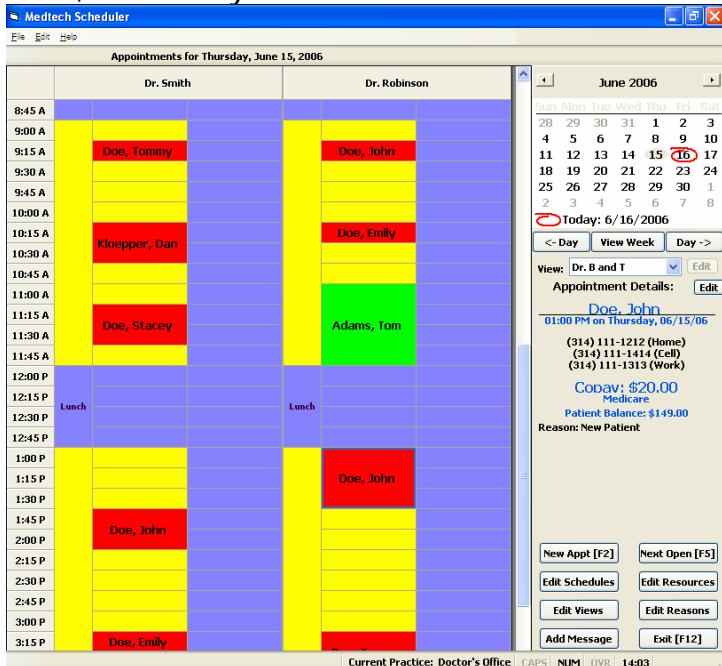
View appointments one week at a time

You can see what your whole week looks like at a glance? Want to change something? No problem. Just click and go!



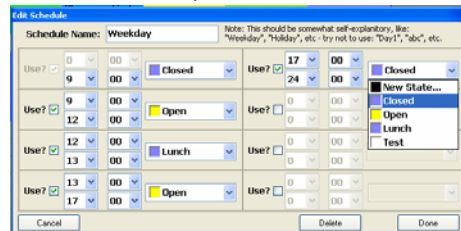
Define Multiple Views for the appointments

Want to see Dr. Smith and Dr. Jones and XRay side by side by side? No problem. Want to see Dr. Jones and XRay only? No problem. Want to see just Dr. Smith? No problem. See what you want, not what you don't.



Define different appointment times for specific periods of time

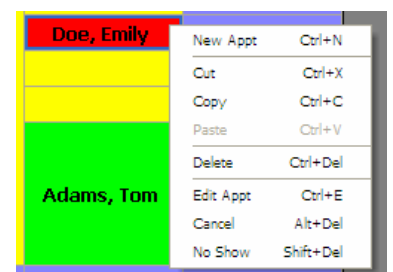
Your doctor normally sees patients from 9 – 5. During the summer, though, the doctor sees patients from 10 – 3. No problem. Add a scheduling layer, tell the system when it starts, when it ends, and which hours are open/closed.



No need to change your default schedule. Just add a layer.

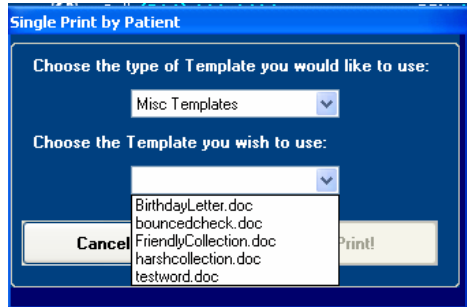
Easily change with Cut, Copy, and Paste

You've scheduled an appointment. Now you need to move it to another time/day, or, you've scheduled a patient once, but need to repeat the same appointment again. No problem. Copy and paste, done!



Interface with Microsoft for Printing

Microsoft Word and Excel are ready to be accessed by the new system. A whole new world of opportunities opens with MS Word and MS Excel.



Preview any report before printing

Just want to see it on screen? No problem. "Preview" is standard on all reports.

Detailed Insurance Aging Report

Use the color in your color printers

Color-coded graphs are included in some of the reports. Utilizing color is a high-priority in this system.

Setup NPI numbers

The new system is ready to accept the NPI numbers, well ahead of the deadline in May, 2007.

Seamless interface with Soapware's Electronic Medical Records Software

Patient demographics will easily flow from Medtech into Soapware increasing your productivity and reducing your headaches.

Increase your efficiency with statements

There's no need to keep sending statements to patients you're sure won't pay. Setup the new system to limit the number of times a patient receives a statement. The system will automatically flag those patients with the account type of your choice. You can report on those patients and determine how to proceed with them. The new billing function is truly Cycle Billing. You define the frequency of the cycle. You can also define a minimum dollar amount. Your setup determines the "smarts" on the new statement functions.

Generate professional looking SuperBills

Design them how you'd like. Add the colors you want. Print on plain paper. Save time and money doing it yourself.

Print professional looking statements

The new statement format is slick. You'll be amazed at what your system can now produce.

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