

OfficeMate®

User's Guide

October 2009

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CHAPTER 1

Getting Started

In this chapter:

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- [OfficeMate Overview, 16](#)
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- [Setting Up OfficeMate, 30](#)
- [Loading Lens Products into OfficeMate, 75](#)
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Choosing OfficeMate to record and manage your eyecare practice records is the first step in creating a fully automated medical practice. This guide will show you how to use OfficeMate to maintain patient demographic and inventory information, create Rx and lab orders, generate fee slips and receipts, process insurance information, and generate practice and patient reports.

Finding More Information

In addition to the *OfficeMate User's Guide*, documentation for OfficeMate also includes the following training:

- *iTrain Training and Demonstrations*. These Internet-based, prerecorded training and demonstration videos should be viewed by all OfficeMate users. Go to www.officemate.net and view the following core OfficeMate iTrains:
 - OSSU 100 Tutorials - Setting Up OfficeMate
 - OSSU 200 Tutorials - OfficeMate for Front Desk Staff
 - OSSU 300 Tutorials - OfficeMate for Opticians
 - OSSU 400 Tutorials - OfficeMate for Billing Staff
 - OSSU 500 Tutorials - OfficeMate for Administrators

- *OfficeMate Software Solutions University (OSSU)*. These Internet-based, one-hour training courses should be taken by all OfficeMate users to focus on specific training topics such as setting up OfficeMate, checking patients in and out, creating Rx orders, maintaining inventory, billing insurance carriers, receiving payments, and creating reports and other documents. To register for OSSU classes, call 800.269.3666 and select option 3 and then option 1, or go to www.officemate.net.
- *OfficeMate Knowledge Base*. This searchable online knowledge base allows you to read helpful articles about OfficeMate and submit questions that are answered by knowledgeable OfficeMate staff members. Go to <http://www.officemate.net/omkb/> to browse the OfficeMate Knowledge Base.

OfficeMate Overview

Your OfficeMate software manages all of your patient, practice, and product information in a secure database that is easy to modify and use. This section includes the following topics:

- [Explanation of Interface Elements, 17](#)
- [Explanation of Navigation Schemes, 18](#)
- [Implementation Flowchart, 23](#)

Explanation of Interface Elements

Figure 2-1 depicts the OfficeMate main window.

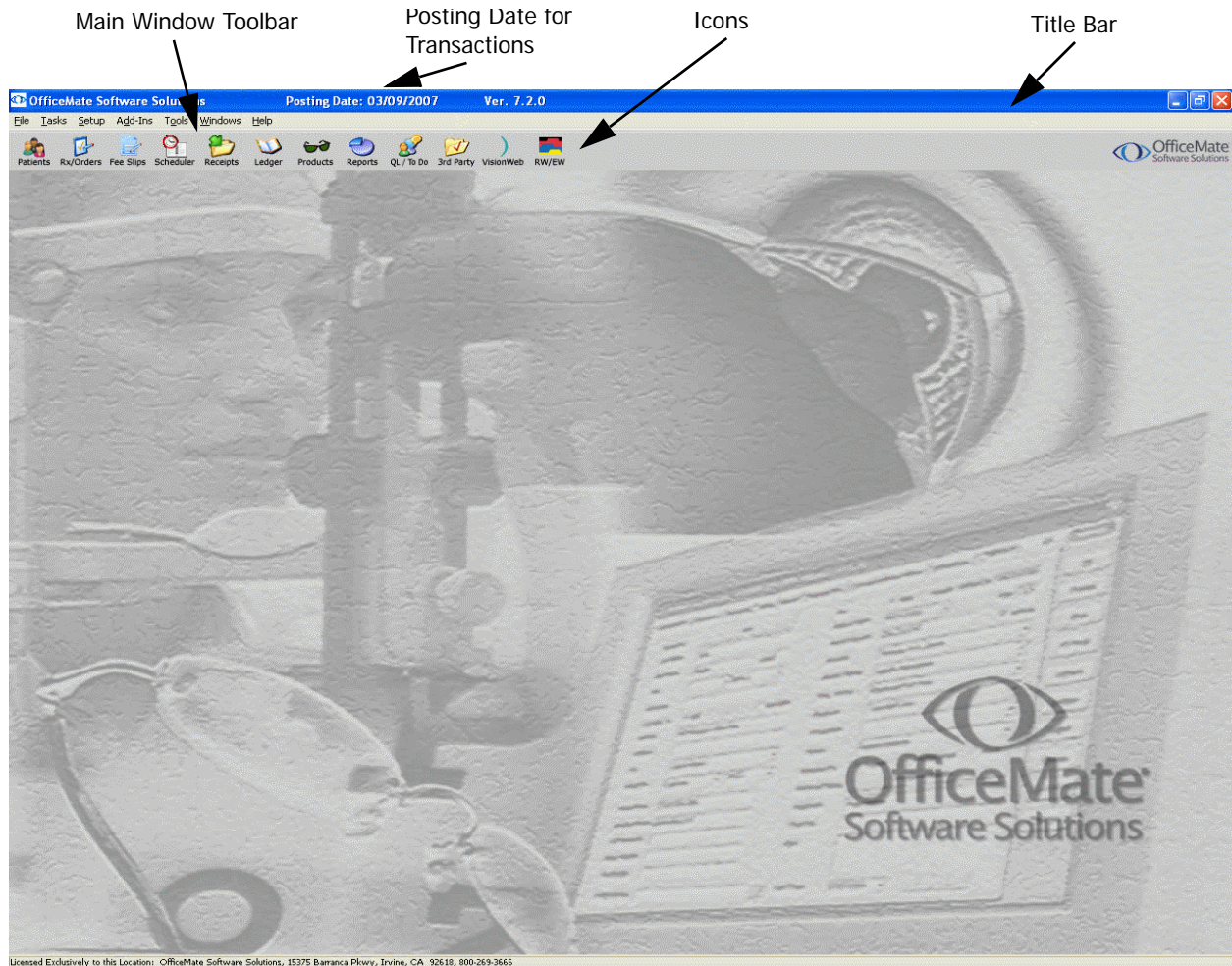


Figure 1-1: OfficeMate Main Window

Explanation of Navigation Schemes

OfficeMate has many unique navigation schemes. OfficeMate Software Solutions highly recommends familiarizing yourself with the OfficeMate navigation schemes in order to more quickly and efficiently navigate through OfficeMate and perform tasks.

This section tells you how to use the various navigation schemes in OfficeMate, including how

- To use the right-click functionality, 18
- To add and maintain list box selections (F12), 19
- To search for a patient or guarantor (F2), 19
- To find a product (Ctrl+P), 20
- To record additional data on fee slips (F4), 20
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- To cascade open windows, 22
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► To use the right-click functionality

- ❖ Right-click on the Patient Demographic, Eyewear Order, Soft Lens Order, Hard Lens Order, Fee Slip, Patient Ledger, and Receipts & Adjustments window title bars or on a patient in the OfficeMate Information Center window to open a shortcut window with options to open the current patient's Patient Demographic, Rx Eyewear, Soft Lens, Hard Lens, Schedule, and Receipts windows. You can also open ExamWRITER and CARE, print labels and documents, and change the patient's room location by right-clicking on these title bars.



- For example, right-click on the **Patient Demographic** window title bar and select **Ledger**. The **Patient Ledger** window opens and displays the ledger information for the same patient displayed on the Patient Demographic window.
- For example, right click on the **Patient Ledger** window title bar, click **Label**, and select **Mailing Label**. A mailing label for the patient will automatically print.

► To add and maintain list box selections (F12)

- ❖ Press the **F12** key when your cursor is in a drop-down box to open a **Maintain** window and add new items to the drop-down menu selections.
 - For example, press **F12** while your cursor is in the **City** drop-down box in the **Patient Demographic** window. The **Maintain City** window opens. Type a city in the **Description** column and click **OK** to add the city to the drop-down menu selections or select a city and click **Default** to make that city the default selection in the drop-down menu.

Description	NSF Code
Helena	
Irvine	
Laguna Niguel	
Lake Forest	
Mission Viejo	
Rancho Santa Margarita	
Tustin	

OK
Cancel
Default

► To search for a patient or guarantor (F2)

- ❖ Press the **F2** key in the Patient Demographic, Eyewear Order, Soft Lens Order, Hard Lens Order, Fee Slip, Appointment Scheduling, Receipts & Adjustments, and Patient Ledger windows to open the **Find Patient/Guarantor** window and search for a patient or guarantor.

Selection Criteria

Last Name		City	
First Name		Home Phone	
Social Security No		Patient No	
Address		Chart No	
Date Of Birth			

Name	Address / City	Home Phone	SS No	DOB	Patient	HIPAA	RFR

Patients Found: ☐ Include inactive **F2 Find** **Select** **Clear** **Cancel** **New**

► To find a product (Ctrl+P)

- Place your cursor in the **Product Name/Code** column in the **Fee Slip** window and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for products.
- Place your cursor in the **Product Code** or **Name** text box in the **Eyewear Order** or **Hard Lens Order** window and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for products.
- Place your cursor in the **Product Code** or **Lens Name** text box in the **Soft Order** window and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for products.

The **Find Product** window displays search criteria in the 'Selections' section and a table of products.

Selections:

Name	pic	Designer		DBL Size	
Color		Product Code		Temple Size	
Manufacturer		Eye Size		UPC	

Product List:

Product Name/Code	Print Name	Color	Eye	DBL	Templ	Brdg	BC	Dia	Sphere	Cyl	Axis	Add	On Hand	
PICCOLO 1.60	PROGRESSIVE H.I.						0.00	0.00	0.00	0.00	0	0.00	0	
PICCOLO 1.67	PROGRESSIVE H.I.						0.00	0.00	0.00	0.00	0	0.00	0	
PICCOLO 1.67 TRANS GREY	PROGRESSIVE TRANS						0.00	0.00	0.00	0.00	0	0.00	0	
PICCOLO CLEAR	PROGRESSIVE						0.00	0.00	0.00	0.00	0	0.00	-6	
PICCOLO TRANS GREY	PROGRESSIVE TRANS						0.00	0.00	0.00	0.00	0	0.00	0	

Total Products: 5

Buttons: F2 Find, Select, Clear, Add Product, Cancel, ☒ VSP Mapped Items Only

► To record additional data on fee slips (F4)

- ❖ After entering the product name and code onto the fee slip, press the **F4** key in the Fee Slip window to open the **Fee Slip Item Additional Data** window and add additional information to the fee slip.

The **Fee Slip Item Additional Data** window displays the following information:

Product: 101 COACH ASTOR (679516719029)

Discount Type: [Dropdown]

Discount: 0.00 (Amount) / Percent

Sales Tax %: 0.0000 **2nd Tax:** 0.0000

CPT/HCPCS: V2020 Designer Frame

Modifier(s): 21 Prolonged Evaluation & Manageme, 22 Unusual Service, 24 Unrelated Eval & Mgt Svc by Same, 25 Sig, Sep Ident Eval & Mgt Same Dr

Provider: Ruiz, M.D., Raymond

Service Date: 09/22/2006 To 09/22/2006

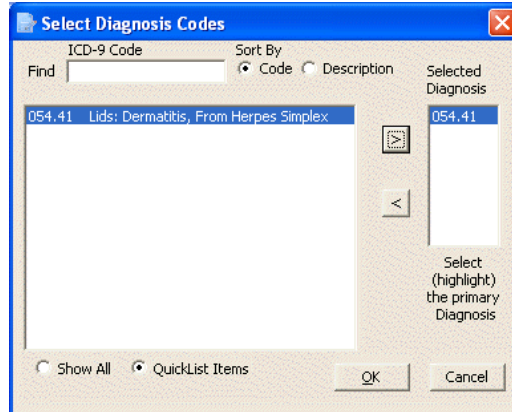
Note Reference: [Dropdown]

Item Narrative: [Text Area]

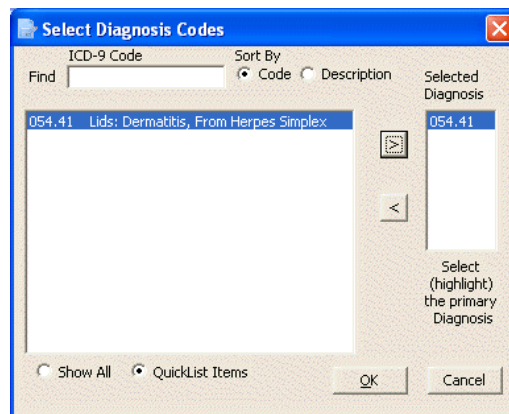
☐ Do not print on patient statement

Buttons: OK, Cancel

- ▶ To select diagnosis codes on fee slips (F5)
 - Place your cursor in the **Product Name/Code** column in the **Fee Slip** window and press the **F5** key to open a shortcut window with a selection of products and services that you use most often.
 - Place your cursor in the **ICD-9** column in the **Fee Slip** window and press the **F5** key to open the **Select Diagnosis Codes** window and search for and select diagnosis codes.



- ▶ To select diagnosis codes on fee slips (Ctrl+D)
 - ❖ Place your cursor in the **ICD-9** column in the **Fee Slip** window and press the **Ctrl** and **D** keys at the same time to open the **Select Diagnosis Codes** window and search for and select diagnosis codes.



► To use other keyboard shortcuts

- Press the **Alt** key and the underlined letter in a button or tab to open the window that would open if you clicked the button or tab with your mouse.
 - For example, press the **Alt** and **L** keys at the same time in the Fee Slip window to open the Patient Ledger window.
 - For example, press the **Alt** and **C** keys at the same time in the Patient Demographic window to open the Correspondence History tab on the Patient Demographic window.
- Press the **Tab** key to move your cursor to the next text box in a window.
 - For example, while your cursor is in the Last Name text box in the Patient Demographic window, press the **Tab** key to move your cursor to the First Name text box.
- Press the **Esc** key to close a window.

► To cascade open windows

- 1 Click **Windows** on the OfficeMate main window toolbar.
- 2 Select **Cascade**.

The windows that are open cascade in the top left of the OfficeMate main window.

► To close all open windows

- 1 Click **Windows** on the OfficeMate main window toolbar.
- 2 Select **Close All Windows**.

All of the windows that are open close.

Implementation Flowchart

Follow this implementation flowchart when you are setting up and using OfficeMate:

For more information on implementing OfficeMate, see the [iTrain training and demonstrations](#) and the [OSSU training courses](#).

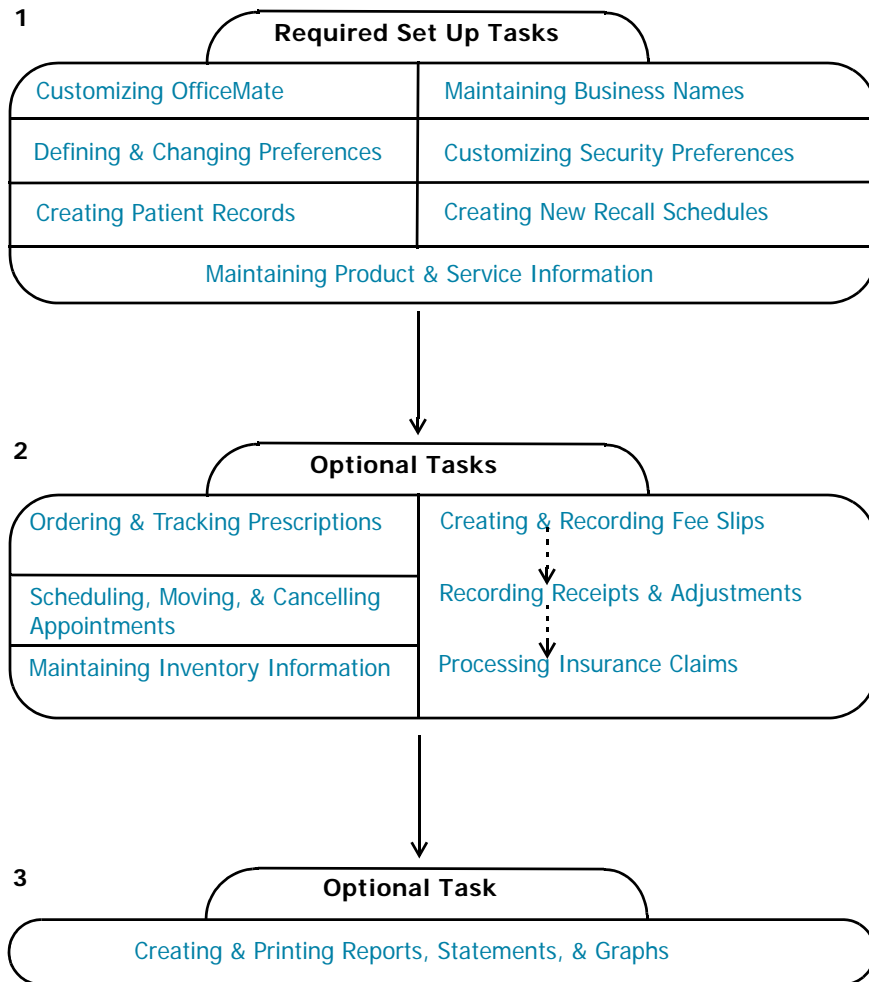


Figure 1-2: Implementation Flowchart

System Specifications

Eyefinity/OfficeMate suggests using Dell and IBM computers. The following sections describe the software, hardware, and network system specifications that are required when using OfficeMate:

- [Software Specifications, 24](#)
- [Hardware Specifications, 25](#)
- [Network Specifications, 29](#)

Software Specifications

Software	Recommendation	Minimum Requirement	Notes
Workstation Operating System	Windows® XP Professional or Windows® Vista SP1 (Business Edition, Enterprise Edition, or Ultimate Edition)	Windows® 2000 Professional	<p>Install the latest service pack and critical updates for your operating system.</p> <p>Windows® XP Vista, Windows® XP Home, and Windows® XP Media Center Edition are not recommended for office environments. For information about the differences between Windows® XP Home Edition and Professional Edition, go to http://www.officemate.net/omkb/article.aspx?id=14170. Ensure that your computer is certified for the operating system that you are using. For information about the OfficeMate Suite and Windows Vista, go to http://www.officemate.net/omkb/Article.aspx?id=11512.</p>
Server Operating System	Windows® 2003 Server		<p>Install the latest service pack and critical updates for your operating system.</p> <p>We are currently still testing OfficeMate Suite's compatibility with Windows® Server 2008.</p>

Hardware Specifications

Note

- Eyefinity/OfficeMate highly recommends employing certified operating system and networking technicians to install and manage your computer systems. Eyefinity/OfficeMate does *not* provide support for your computer systems.
- Our hardware specifications are intended as general guidelines for routine single and multi-user installations. These requirements do not include specifications for Microsoft Terminal Server installations. Microsoft Terminal Server has unique hardware, network, installation, and configuration requirements and it must be installed and configured by technicians with Terminal Server expertise; Eyefinity/OfficeMate does *not* provide this expertise. If you are remotely accessing your computers using Terminal Server or Remote Desktop, your OfficeMate Suite software must be licensed for 16+ computers. If your software is not licensed for 16+ computers, contact Sales at 1.800.269.3666 or sales@officemate.net.

Hardware	Recommendation	Minimum Requirement	Notes
Workstation Processor	Intel® Pentium® D, 3.0 GHz	Intel® Pentium® 4, 2.0 GHz	OfficeMate and ExamWRITER are compatible with all x86 processors, including x64 and dual-core processors.
Server Processor	Intel® Xeon® 3000	Intel® Core™ Duo	If you are using Microsoft Exchange Server, ensure that you are using 1–2 GB RAM.
Workstation Memory	1 GB or higher	512 MB	Memory has a significant impact on your system performance. Using 512 MB or higher RAM in each computer will noticeably improve performance.
Server Memory	More than 2 GB or higher, depending on how many workstations and services the server is hosting and what type of database you are using	1 GB or higher	Memory has a significant impact on your system performance and using the recommended RAM in the server will noticeably improve performance. If you are using a SQL database, we recommend that you use 2 GB or higher RAM in the server.

Hardware	Recommendation	Minimum Requirement	Notes
Hard Drive	60 GB or higher with at least 2 GB free for the software and at least 8 GB free for the databases 7200/10k RPM is recommended for servers.	40 GB or higher with at least 2 GB free for the software and at least 8 GB free for the databases 7200/10k RPM is recommended for servers.	OfficeMate, ExamWRITER, and ReportWRITER require at least 2 GB of free space. The databases require at least 8 GB of free space; however the databases may reside on a server rather than on each workstation. The database size will grow as you add patient data.
Monitor	19-inch	17-inch	Flat LCD screens are recommended with a minimum resolution of 1024x768 pixels.
Monitor and Video Adapter	1280 x 1024 pixels	1024 x 768 pixels	OfficeMate requires 64k colors.
Document Printer	HP LaserJet	HP LaserJet	Multifunction, bubble jet, and ink jet printers may not operate properly and are not recommended.
Mailing and File Folder Label Printer	Dymo LabelWriter 400	Dymo LabelWriter 400	
Barcode Printer	SATO CX 400	SATO CX 400	
Document Scanner			Eyefinity/OfficeMate does not recommend a specific scanner brand or model; you can use any scanner that can create an electronic document with the OfficeMate & ExamWRITER eDocuments feature. For more information on scanners, see our Knowledge Base article #10958 , or consult your hardware technician.
Barcode Scanner	Datalogic Gryphon M100 USB Cordless Handheld Scanner or Datalogic Heron D130 USB Corded Handheld Scanner	Datalogic Gryphon M100 USB Cordless Handheld Scanner or Datalogic Heron D130 USB Corded Handheld Scanner	

Hardware	Recommendation	Minimum Requirement	Notes
Fax Modem and Internet Connection	3Com, US Robotics External 56k (fax modem) High-speed Internet DSL, cable, or T1 connection	56k Internal (fax modem) 56k or higher dial-up Internet connection	High-speed DSL or cable modems are recommended for Internet access, training, and support. If your electronic claims clearinghouse requires a phone line modem, you will need a separate Internet connection and fax modem.
Backup Media	Separate high-density removable storage media (i.e., CD-R, CD-RW, Zip disk, Jaz disk) for each day of the week. Off-site storage backup with OfficeMate iBackup Powered by DataHEALTH is also recommended.	High-density removable storage media (i.e., CD-R, CD-RW, Zip disk, Jaz disk)	Eyefinity/OfficeMate suggests using CD-RW media to manually backup your office and patient data and OfficeMate iBackup Powered by DataHEALTH to automatically backup, confirm, and protect your office and patient data. For data only backups, 100/250 MB Zip disks are acceptable. If you are a Windows® 2000 or Windows® XP user, you can use the included backup utility. After-market programs such as Backup Exec offer extended backup scheduling options. Although Eyefinity/OfficeMate recommends the backup software listed above, it does not provide support for any backup software.

Hardware	Recommendation	Minimum Requirement	Notes
Uninterruptible Power Supply (UPS)	UPS on each workstation and file server	UPS on file server	Electric power is not always delivered to your outlets in perfect condition. Fluctuations can impact your computer's performance. A total loss of power can damage your data if your system was running at the time of a power loss. A UPS with line conditioning capabilities can help control the level of power coming to your system. In the event of a power loss, a UPS contains a backup battery to keep your computer running long enough to safely shut it down.

Network Specifications

The recommended network configuration uses a dedicated Windows® 2003 Server operating system with Windows® XP Professional installed on each computer. OfficeMate can be used with Windows® peer-to-peer networks for configurations of three or fewer computers, but for networks with more than three computers, a dedicated file server is strongly recommended. Only use TCP/IP when configuring your network.

Note

Eyefinity/OfficeMate highly recommends employing certified operating system and networking technicians to install and manage your computer systems. Eyefinity/OfficeMate does *not* provide support for networks.

Network Item	Recommendation	Minimum Requirement	Notes
Cables	Category 5 Twisted Pair and Shielded Twisted Pair (STP) Ethernet	Category 5 Twisted Pair and Shielded Twisted Pair (STP) Ethernet	
Cards	3Com or Intel 10\100\1000 Mbps Ethernet	3Com or Intel 10\100 Mbps Ethernet	
Switches	1000 Mbps transfer rates	100 Mbps transfer rates	Eyefinity/OfficeMate does not recommend using hubs.
Wireless	802.11G Purchase your wireless access port and wireless network card from the same manufacturer. Enable wireless security.	802.11G Purchase your wireless access port and wireless network card from the same manufacturer. Enable wireless security.	Wireless networks offer significantly lower performance and reliability than wired networks; therefore, Eyefinity/OfficeMate recommends hard-wired networks in environments where high performance is necessary.
Remote Access	GoToMyPC		GoToMyPC is HIPAA compliant. For more information on using GoToMyPC for remote access, go to www.gotomypc.com .

Setting Up OfficeMate

For more information on setting up OfficeMate, see the “OSSU 100 Tutorials: Setting Up OfficeMate” and the OSSU 100 Series, “Setting Up OfficeMate,” training courses.

You can set up OfficeMate before you use it, or you can change your setup options anytime while you are using the program. This section includes the following topics:

- [Changing the Posting Date, 30](#)
- [Setting Up the Printer, 31](#)
- [Customizing OfficeMate, 33](#)
- [Maintaining Business Names, 48](#)
- [Customizing Security Preferences, 62](#)
- [Changing Your Password, 66](#)
- [Maintaining Add-In Programs, 66](#)
- [Defining & Changing Preferences, 67](#)

Changing the Posting Date

All OfficeMate transactions are recorded on the posting date. The Daily Transaction Audit report is the only report that displays all transactions that occurred on a specific calendar date regardless of the posting date. All other reports display transactions that occurred on the posting date. If you change the posting date to record backdated transactions, be sure to change the posting date back to today’s date after you are finished recording backdated transactions.

Note

When you open OfficeMate, the posting date is the same as your computer date. If you change the posting date, it will revert back to the computer date when you close OfficeMate. Changing the posting date on your computer does not affect the computer date on your computer or other computers on your network.

- 1 From the OfficeMate main window, click **File**, and select **Change Posting Date**.

The **Posting Date** window opens.

- 2 Change the posting date using one of the following methods:
 - Type the new posting date in the **Posting Date** text box.
 - Click the **Posting Date** pop-up menu arrow to choose a date on the calendar.
 - Click **Today** to change the posting date to today’s date.



- 3 Click **OK**.

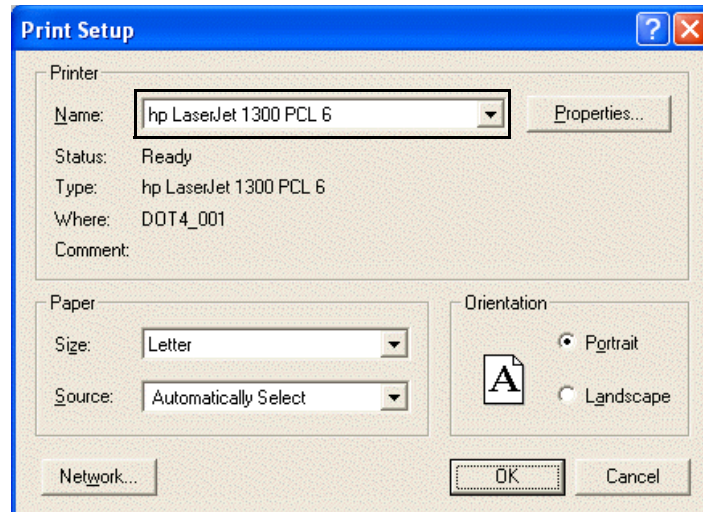
Setting Up the Printer

This section tells you how to set up the printer, including how

- To select a printer, 31
- To change the printer's document properties, 31
- To select the paper size and source, 32
- To change the paper orientation, 33

► To select a printer

- 1 From the OfficeMate main window, click **File**, and select **Printer Setup**.
The **Print Setup** window opens.
- 2 Select the printer's name that you want to use from the **Name** drop-down menu.



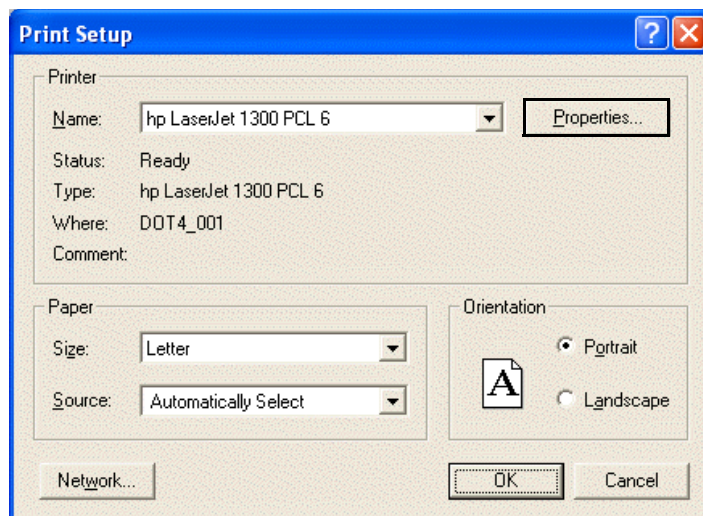
- 3 Click **OK** to close the Print Setup window.

► To change the printer's document properties

- 1 From the OfficeMate main window, click **File**, and select **Printer Setup**.
The **Print Setup** window opens.

For more information on changing the printer's document properties, see the manual that came with the printer or computer operating system.

- 2 Click **Properties** to change the printer's document properties.



The **Document Properties** window opens.

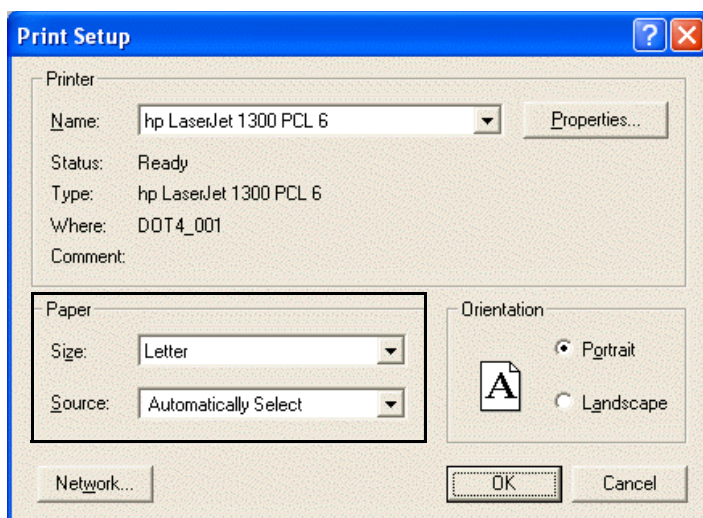
- 3 Click on the tabs and change the printer's document properties.
- 4 Click **OK** to close the Document Properties window.
- 5 Click **OK** to close the Print Setup window.

► **To select the paper size and source**

- 1 From the OfficeMate main window, click **File**, and select **Printer Setup**.

The **Print Setup** window opens.

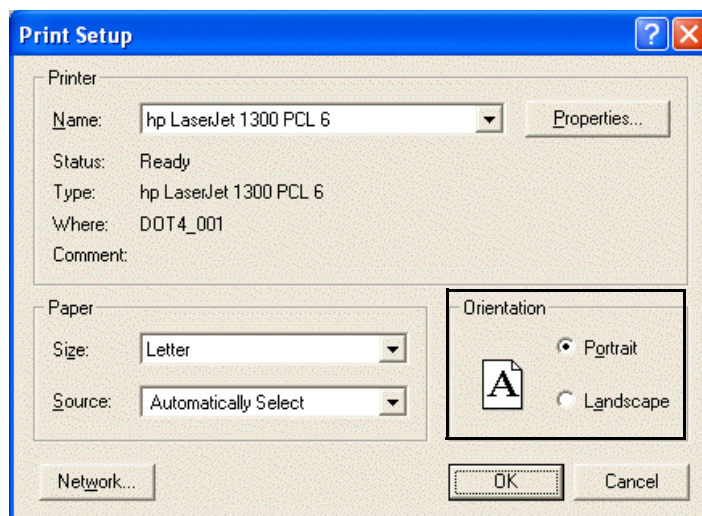
- 2 Select the paper size from the **Size** drop-down menu.
- 3 If activated, select the paper source from the **Source** drop-down menu.



- 4 Click **OK** to close the Print Setup window.

► To change the paper orientation

- 1 From the OfficeMate main window, click **File**, and select **Printer Setup**.
The **Print Setup** window opens.
- 2 Select the **Portrait** or **Landscape** orientation radio button.



- 3 Click **OK** to close the Print Setup window.

Customizing OfficeMate

For more information on customizing OfficeMate, see the “OSSU 100 Tutorials: Setting Up OfficeMate” and the OSSU 100 Series, “Setting Up OfficeMate,” training courses.

Although you can customize OfficeMate at any time, we suggest that you complete the customization instructions before you start using OfficeMate to record and store practice management records. This section tells you how to customize OfficeMate, including how

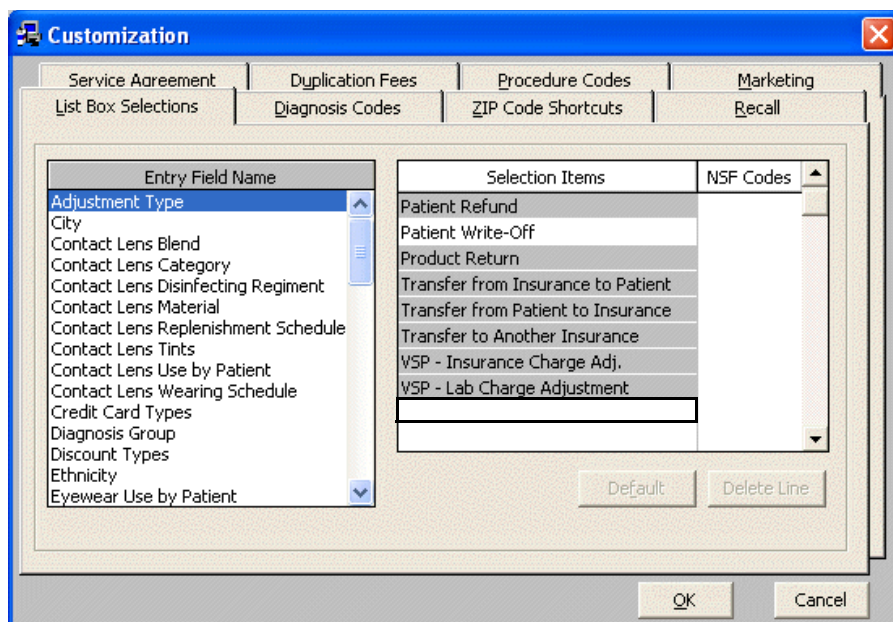
- To add list box selections, 34
- To modify list box selections, 34
- To add diagnosis codes, 35
- To add ZIP code shortcuts, 36
- To modify ZIP code shortcuts, 38
- To create new recall schedules, 39
- To modify recall schedules, 40
- To delete recall schedules, 40
- To create new service agreement renewal plans, 41
- To modify service agreement renewal plans, 42
- To delete service agreement renewal plans, 43
- To identify contact lens duplication fees, 44
- To add procedure codes, 45
- To maintain marketing groups and categories, 47

► To add list box selections

Note

You can add new selections to a list box while you are working in OfficeMate by pressing the F12 key any time your cursor is in a list box.

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.
- 2 Select an item in the **Entry Field Name** box.
- 3 Place your cursor in the first blank line at the bottom of the **Selection Items** box.



- 4 Type the new selection item or NSF code.

Note

- To make an item the default item in the list, select the item in the Selection Items box and click **Default**.
- To deselect a default item in the list, select the default item in the Selection Items box and click **UnDefault**.

- 5 Click **OK** to save the new list box selection and exit the Customization window.

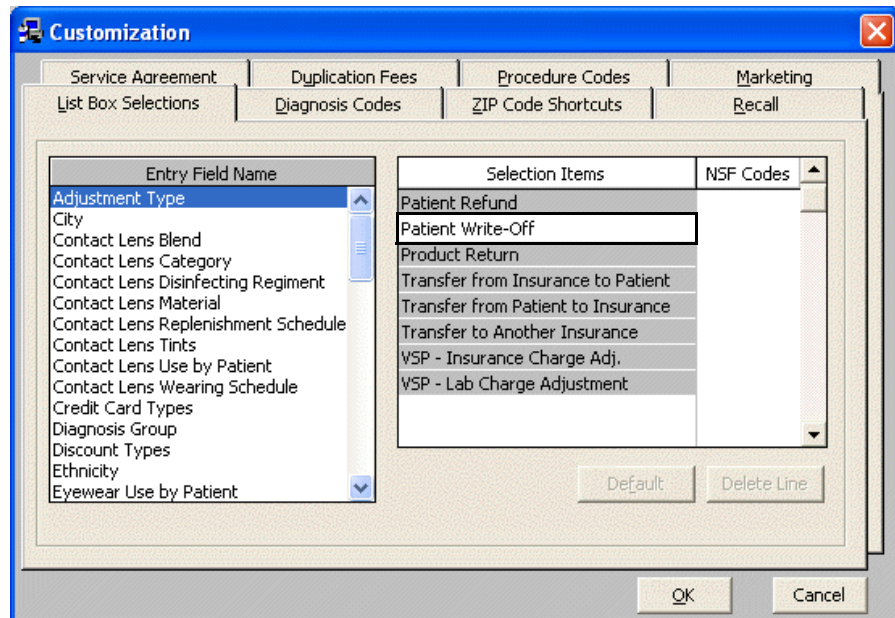
► To modify list box selections

Note

You can modify list box selections while you are working in OfficeMate by pressing the F12 key any time your cursor is in a list box.

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.
- 2 Select an item in the **Entry Field Name** box.

- 3 Click the item that you want to modify in the **Selection Items** box.



- 4 Type your changes.

Note

- To make an item the default item in the list, select the item in the Selection Items box and click **Default**.
- To deselect a default item in the list, select the default item in the Selection Items box and click **UnDefault**.
- You should only delete list box selections if they are *not* linked to any records.

- 5 Click **OK** to save the modified list box selection and exit the Customization window.

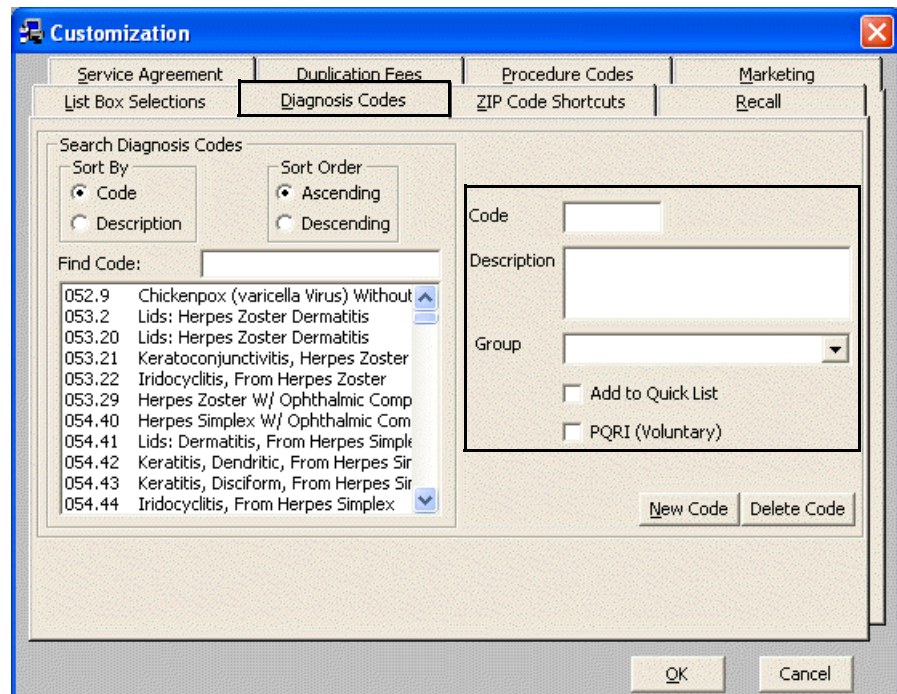
► To add diagnosis codes

Note

When you upgrade to OfficeMate versions 7.x and above, the most recent diagnosis codes are imported into your current list of diagnosis codes. None of your current diagnosis codes are overwritten; only new codes are added.

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Diagnosis Codes** tab.
- 3 Click **New Code**.
- 4 Type a diagnosis code number in the **Code** text box.
- 5 Type a diagnosis code description in the **Description** text box.

- 6 Select a diagnosis group from the **Group** drop-down menu.



- 7 Select the **Add to Quick List** check box if you want to add the new diagnosis code to your Quick List.
- 8 Select the **PQRI (Voluntary)** check box to designate the diagnosis code as part of the CMS Physician Quality Reporting Initiative (PQRI).

Notes

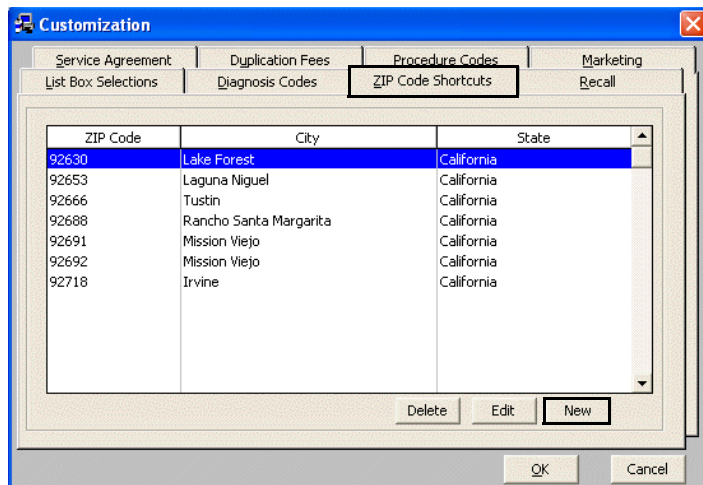
- For more information about the PQRI, go to the Centers for Medicare and Medicaid Services Web site at www.cms.hhs.gov.
- After designating PQRI diagnosis codes and level II procedure codes, you will not receive a reminder on fee slips with level II procedure codes and \$0 fees, and you will not receive the “Line Item cannot have ZERO” error in the Third Party Processing window. If all of the items on an insurance claim are level II procedure codes, then you can submit a \$0 balance insurance claim. For information on designating level II procedure codes, go to [To add procedure codes on page 45](#).

- 9 Click **New Code** to enter another diagnosis code.
- OR
- Click **OK** to save the new diagnosis code and exit the Customization window.

► To add ZIP code shortcuts

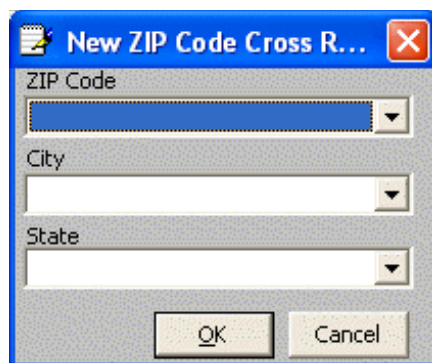
- On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- Click the **ZIP Code Shortcuts** tab.

- 3 Click **New**.



The **New ZIP Code Cross Reference** window opens.

- 4 Select a ZIP code, city, and state from the **ZIP Code**, **City**, and **State** drop-down menus.



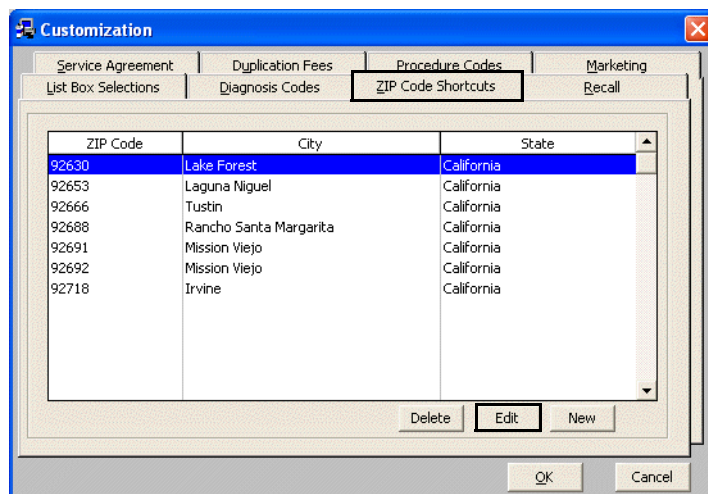
Notes

- If the ZIP code, city, or state that you want to add is not available in the drop-down menus, press the **F12** key to add it to the drop-down menus and click **OK**.
- To add a ZIP code, city, or state as a default option, press the **F12** key; type or select the ZIP code, city, or state; click **Default**; and click **OK**.

- 5 Click **OK** to close the New ZIP Code Cross Reference window.
- 6 Click **OK** to close the Customization window.

► To modify ZIP code shortcuts

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.
- 2 Click the **ZIP Code Shortcuts** tab.
- 3 Click **Edit**.



The **New ZIP Code Cross Reference** window opens.

- 4 Select a ZIP code, city, or state from the **ZIP Code**, **City**, and **State** drop-down menus.
- 5 Press the **F12** key.
The **Maintain** window opens.
- 6 Modify the ZIP code, city, or state and click **OK**.

Notes

- To add a ZIP code, city, or state as a default option click **Default**.
- To deselect a default ZIP code, city, or state, click **UnDefault**.

- 7 Click **OK** to close the New ZIP Code Cross Reference window.
- 8 Click **OK** to close the Customization window.

For more information on creating, modifying, and deleting recall schedules, see the "OSSU 102 Customizing OfficeMate" iTrain and the OSSU 100-1, "Setting Up Products & Services and Customizing OfficeMate," training course.

► To create new recall schedules

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Recall** tab.
- 3 Click **New Recall**.
- 4 Type the name of the new recall schedule in the **Recall Type** text box.
- 5 Type the number of months until the patient will be recalled in the **Months to Next Recall** text box.
- 6 Type the number of weeks or months between the patient's recall date and the notice that you are creating in the Renewal Notice Mailing Schedule # column.
- 7 Select **Month(s)** or **Week(s)** from the **Period** column drop-down menu.
- 8 Select **After** or **Before** from the **When** column drop-down menu.
- 9 Select the type of recall letter or postcard to print from the **Print Letters/Postcard** column drop-down menu.

Note

If there is no appropriate letter or postcard to select from the Print Letters/Postcard column drop-down menu, click **Compose Letter** to open CARE or the Maintain Documents window and compose a letter.

The screenshot shows the 'Customization' window with the 'Recall' tab selected. At the top, there are tabs for 'Service Agreement', 'Duplication Fees', 'Procedure Codes', and 'Marketing'. Below these are 'List Box Selections', 'Diagnosis Codes', 'ZIP Code Shortcuts', and 'Recall'. The 'Recall' tab is active, showing a 'Select Recall Type' dropdown and a 'Delete Recall' button. Below this is a 'Recall Type' text box containing '24 Month' and a 'New Recall' button. A 'Months to Next Recall' spinner box is set to '18'. The main area is a 'Recall Notice Mailing Schedule' table with 5 columns: '#', 'Period', 'When', 'What Date', and 'Print Letters/Postcard'. The first row is filled with '1', '24 Month(s)', 'Before', 'Recall Date', and '2 Years - Adult'. Rows 2 through 7 are empty. At the bottom of the table are 'Insert Line' and 'Delete Line' buttons. A 'Compose Letter' button is located to the right of the table. At the very bottom of the window are 'OK' and 'Cancel' buttons.

- 10 Repeat steps 3–9 to create additional new recall schedules.

OR

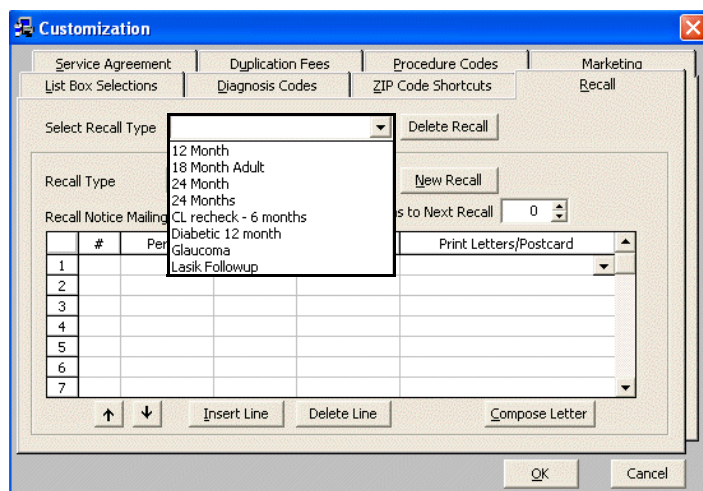
Click **OK** to close the Customization window.

Note

To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.

► **To modify recall schedules**

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.
- 2 Click the **Recall** tab.
- 3 Select a recall type from the **Select Recall Type** drop-down menu.



- 4 Modify the **Recall Type** and **Months to Next Recall**.
- 5 See [To create new recall schedules on page 39](#), steps 5–9, to modify the information in the **Recall Notice Mailing Schedule** table.
- 6 To delete a mailing schedule, select a line and click **Delete Line**.
- 7 To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.
- 8 Repeat steps 3–7 to modify additional recall schedules.

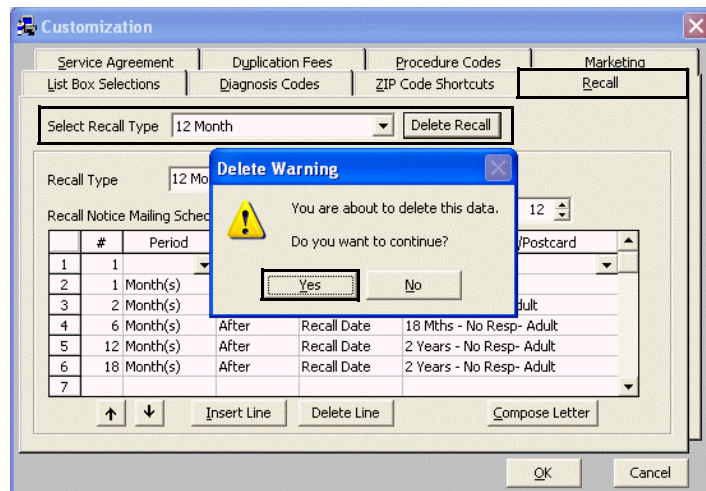
OR

Click **OK** to close the Customization window.

► **To delete recall schedules**

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.
- 2 Click the **Recall** tab.
- 3 Select a recall type from the **Select Recall Type** drop-down menu.
- 4 Click **Delete Recall**.
The **Delete Warning** window opens.

- 5 Click **Yes** to continue.



- 6 Click **OK** to close the Customization window.

► To create new service agreement renewal plans

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.
- 2 Click the **Service Agreement** tab.
- 3 Click **New Plan**.
- 4 Type the name of the new service agreement in the **Renewal Plan** text box.
- 5 Place your cursor in the Renewal Fees Schedule **Terms in Months** box and select the number of months for each renewal year you offer.
- 6 Place your cursor in the Renewal Fees Schedule **Fee** box and type the fee that corresponds to the renewal plan.
- 7 Type the number of weeks or months between the patient's renewal date and the notice that you are creating in the Renewal Notice Mailing Schedule **#** column.
- 8 Select **Month(s)** or **Week(s)** from the **Period** column drop-down menu.
- 9 Select **After** or **Before** from the **When** column drop-down menu.

- 10 Select the type of renewal letter or postcard to print from the **Print Renewal/Notice** column drop-down menu.

Note

If there is no appropriate letter or postcard to select from the Print Renewal/Notice column drop-down menu, click **Compose Letter** to open CARE or the Maintain Documents window and compose a letter.

- 11 Repeat steps 3–10 to create additional new renewal schedules.

OR

Click **OK** to close the Customization window.

Note

To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.

► To modify service agreement renewal plans

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Service Agreement** tab.

- 3 Select a renewal type from the **Select Renewal Plan** drop-down menu.

- 4 Modify the **Renewal Plan**.
- 5 See [To create new service agreement renewal plans on page 41](#), steps 5–10, to modify the information in the **Renewal Notice Mailing Schedule** table.
- 6 To delete a Renewal Fees Schedule Fee, select the fee that you want to delete and click **Delete Fee**.
- 7 To delete a mailing schedule, select a line and click **Delete Line**.
- 8 To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.
- 9 Repeat steps 3–8 to modify additional recall schedules.

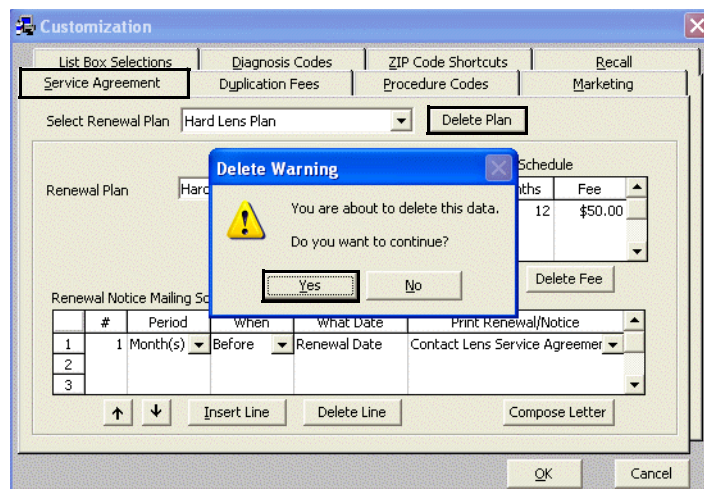
OR

Click **OK** to close the Customization window.

► To delete service agreement renewal plans

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Service Agreement** tab.
- 3 Select a renewal type from the **Select Renewal Plan** drop-down menu.
- 4 Click **Delete Plan**. The **Delete Warning** window opens.

- 5 Click **Yes** to continue.



- 6 Click **OK** to close the Customization window.

► To identify contact lens duplication fees

Identify duplication fees when a service agreement is used for contact lenses.

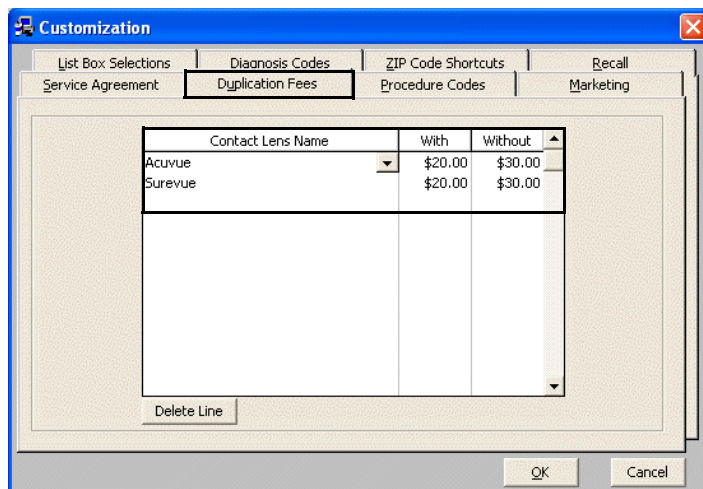
- 1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.
- 2 Click the **Duplication Fees** tab.
- 3 Select the contact lens from the **Contact Lens Name** column drop-down list.

Note

If there is no appropriate contact lens to select from the Contact Lens Name column drop-down menu, place your cursor in a blank row in the Contact Lens Name column and type a contact lens name. The contact lens name and fees are added to your list of products.

- 4 Type the patient's duplication fee with a service agreement in the **With** column.

- 5 Type the patient's duplication fee without a service agreement in the **Without** column.



- 6 Click **OK** to close the Customization window.

► **To add procedure codes**

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Procedure Codes** tab.
- 3 Click **New Code**.
- 4 Type a procedure code in the **Code** text box.
- 5 Type a procedure code description in the **Description** text box.
- 6 Select a type of service from the **Type of Service** drop-down menu.
- 7 Select a financial group from the **Financial Group** drop-down menu.

- 8 Select a production group from the **Production Group** drop-down menu.

Customization

List Box Selections | Diagnosis Codes | ZIP Code Shortcuts | Recall

Service Agreement | Duplication Fees | **Procedure Codes** | Marketing

Search Procedure Codes

Sort by: ☒ Code ☐ Description

Sort Order: ☒ Ascending ☐ Descending

Find Code:

1055F	CATARACT Patient
11440	Excision, Benign 0.5 CM or Less
11441	Excision, Benign 0.6-1.0 CM
11442	Excision, Benign 1.1-2.0 CM
11443	Excision, Benign 2.1-3.0 CM
11444	Excision, Benign 3.1-4.0 CM
11446	Excision, Benign Over 4.0 CM
11640	Excision, Malignant 0.5 CM-Less
11641	Excision, Malignant 0.6-1.0 CM
11642	Excision, Malignant 1.1-2.0 CM
11643	Excision, Malignant 2.1-3.0 CM
11644	Excision, Malignant 3.1-4.0 CM

Code:

Description:

Type of Service:

Financial Group:

Production Group:

Appt Minutes:

Days or Units:

Level II CPT Codes: ☐

New Code Delete Code

OK Cancel

- 9 Select or type the default number of appointment minutes for the procedure code in the **Appt Minutes** text box.
- 10 Select or type the default number of days or units for the procedure code in the **Days or Units** text box.
- 11 Select the **Level II CPT Codes** check box to designate the procedure code as a level II procedure code for the CMS Physical Quality Reporting Initiative (PQRI).

Notes

- For more information about the PQRI, go to the Centers for Medicare and Medicaid Services Web site at www.cms.hhs.gov.
- After designating PQRI diagnosis codes and level II procedure codes, you will not receive a reminder on fee slips with level II procedure codes and \$0 fees, and you will not receive the "Line Item cannot have ZERO" error in the Third Party Processing window. If all of the items on an insurance claim are level II procedure codes, then you can submit a \$0 balance insurance claim. For more information on designating PQRI diagnosis codes, go to [To add diagnosis codes on page 35](#).

- 12 Click **New Code** to enter another procedure code.
- OR
- Click **OK** to save the new procedure code and exit the Customization window.

► To maintain marketing groups and categories

1 On the OfficeMate main window, click **Setup**, and select **Customization**.
The **Customization** window opens.

2 Click the **Marketing** tab.

3 Select a marketing group and click **Delete** to delete the group or click **Edit** to edit the group's name.

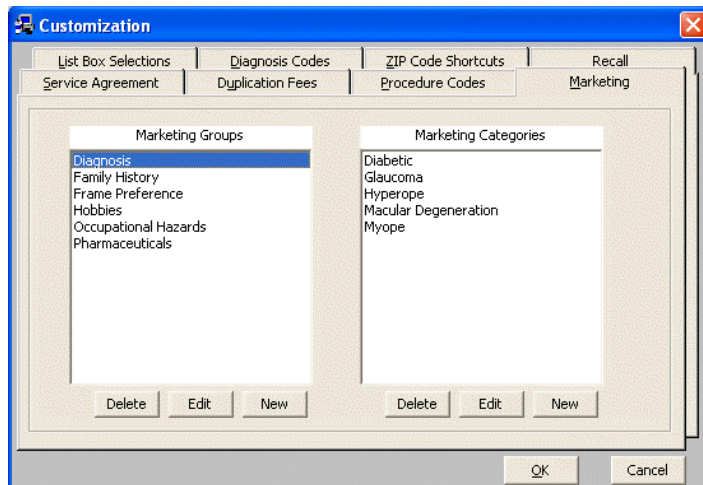
OR

Click **New** to add a new marketing group.

4 Select a marketing category and click **Delete** to delete the category or click **Edit** to edit the category's name.

OR

Click **New** to add a new marketing category to the marketing group.



5 Click **OK** to save the new marketing groups and categories and exit the Customization window.

Maintaining Business Names

For more information on maintaining business names in OfficeMate, see the "OSSU 103 Setting Up Business Name Information" iTrain and the OSSU 100-2, "Setting Up Business Names, Preferences, the Appointment Scheduler, & the Quick List," training course.

This section tells you how to maintain business names in OfficeMate, including how

- [To maintain business names, 49](#)
- [To modify or add provider & staff names, 50](#)
- [To modify or add vendor names, 54](#)
- [To modify or add places of service, 54](#)
- [To modify or add referring doctors, 56](#)
- [To modify or add insurance information, 58](#)
- [To modify or add appointment schedule resources, 61](#)

► To maintain business names

- 1 On the OfficeMate main window, click **Setup**, and select **Business Names**. The **Business Names** window opens.
- 2 Update or add information in the **Fax #**, **Contact**, and **Default Area Code** text boxes.

Notes

- If you submit ANSI insurance claims, you must type a contact name in the **Contact** text box.
- You cannot modify your practice name, address, or phone number from within the Business Names window in OfficeMate. If you need to modify this information, download the Address/Phone Number Change Request document at http://www.officemate.net/support_om_resources.aspx, complete the information on the form, and fax it back to OfficeMate Software Solutions at 866.202.6324.

- 3 Type your service facility NPI number (either your group NPI number or your provider NPI number) in the **NPI Num (33a)** text box.
- 4 Select a qualifier from the **Qualifier (32b)** drop-down menu.

Note

Ensure that you are selecting the appropriate qualifier description and ANSI code in the Qualifier (32b) drop-down menu, as listed below:

Blue Cross Provider Number - 1A
 Blue Shield Provider Number - 1B
 CHAMPUS Identification Number - 1H
 Clinical Lab. Improvement Amendment Number - X4
 Federal Tax Payer's Identification Number - TJ
 Location Number - LU
 Medicaid Provider Number - ID
 Medicare Provider Number - 1C
 Provider Commercial Number - G2
 Provider Plan Network Identification Number - N5
 Provider Taxonomy - ZZ
 Provider UPIN Number - 1G
 State Industrial Accident Provider Number - X5
 State License Number - 0B

- 5 Type your facility ID in the **Facility ID (32b)** text box.

- 6 To attach a corporate logo to your business name, follow the instructions below:
 - a. Click **Update Logo**.
 - b. Click **Browse**.
 - c. Navigate to and select your corporate logo.
 - d. Click **OK**.

Note

All logos must be saved using the JPEG graphic format.

- 7 Click **OK** to save the business name information and exit the Business Names window.

► **To modify or add provider & staff names**

A provider includes any staff member that provides products or services for your patients and for whom you want to track and report revenues.

Note

Many insurance companies and clearinghouses are no longer accepting claims with legacy number and prefer to rely on the NPI. Check with your clearinghouse or insurance carriers to determine if you should include legacy numbers on your CMS 1500 or UB-04claims.

- 1 On the OfficeMate main window, click **Setup**, and select **Business Names**. The **Business Names** window opens.
- 2 Click the **Provider/Staff** tab.

- 3 Click **New** to add a new provider or staff member.

OR

Select a provider or staff member from the **Select Provider/Staff Member** drop-down menu to modify a provider or staff member.

Note

You should only delete provider or staff names if they are *not* linked to any records.

- 4 Type text in the text boxes and choose appropriate options from the drop-down menus.
- 5 Type the login name in the **User ID** text box.
- 6 Type your individual provider NPI number in the **NPI Number (24J)** text box.
- 7 Type the providers's DPS (Department of Public Safety) number in the **DPS #** text box. This number will print on ExamWRITER medical prescriptions.
- 8 If you are adding a staff member for whom you are not tracking revenue, click the Provider **No** radio button.

- 9 If you want to enter HIPAA information, follow the instructions below:
 - a. Type the EIN number in the **EIN Number** text box.

Note

If the provider you selected in step 3 submits ANSI insurance claims, you must type a number in the **EIN Number** text box.

- b. Select a date from the **Privacy Training Date** menu.
 - c. Select the HIPAA Privacy Officer **Yes** radio button if the provider or staff member is a HIPAA Privacy Officer.

- 10 If the doctor plans to process insurance claims, click the **Insurance Info** button and follow the instructions below:
- Select insurance companies to which the doctor plans to bill insurance claims from the **Insurance Company** drop-down menus.
 - Type the insurance company PIN numbers in the **Pin #** column, as needed.
 - Type the insurance company group numbers in the **Group #** column.
 - Type the insurance company submitter IDs in the **Submitter ID** column, as needed.

Note

If you are processing insurance claims through McKesson, type the billing ID and submitter ID that was assigned to you by McKesson in the filing information sheet in the **Submitter ID** column (as one 12 digit number).

- Select the **Accept Assign?** check boxes to populate box 27 on the CMS 1500 form and assign acceptance for the insurance company.
- Select the **Don't Accept Assign?** check boxes to populate box 31 on the CMS 1500 form without assigning acceptance for the insurance company.
- Click **OK**.

Insurance Company	Pin # (Box 24j/33b)	Group # (33b)	Submitter ID (24i)	Accept Assign? (Box 27)	Don't Accept Assign? (Box 27)
Eye Care Plan Of Amer	324543	4575456	86652	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Eye Care Plan Of America	456777789	789786	87387	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Medical Eye Services	567687	2133342	76512	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medical Eye Services	78622	78978	3544489	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Medicare	647655	5654211	45432	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Medicare	78387	5387	78688	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vision Service Plan	123	1235	1234	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons: OK, Cancel, Delete Line

- 11 If you want to set up a commission for a provider or staff member, follow the instructions below:
- Select the **Receive Commission** check box.
 - Select **Gross%**, **Margin%**, or **Set Amt** as a commission Method.
 - Type the commission rate in the **Rate** text box.
 - Type the special incentive amount in the **Spiff** text box, if applicable.

- 12 If you want to save a default signature for the provider or staff member that will print on medical prescriptions, click **Browse**, navigate to the signature, and click **Open**.

Notes

- OfficeMate Software Solutions recommends saving all signatures in the eDocuments folder.
- All signatures must be saved using the JPEG graphic format.
- Some states require an original signature on medical prescriptions. Check with your state regulatory agency to find out if printing a signature on prescriptions is legal in your state.

- 13 Click **OK** to save the provider and staff information and exit the Business Names window.

► To modify or add vendor names

1 On the OfficeMate main window, click **Setup**, and select **Business Names**.
The **Business Names** window opens.

2 Click the **Vendor** tab.

3 Click **New** to add a new vendor.

OR

Select a vendor from the **Vendor Name** drop-down menu to modify a vendor.

Note

You should only delete vendors if they are *not* linked to any exams.

4 Type text into the text boxes and choose appropriate options from the drop-down menus and check boxes.

The screenshot shows the 'Business Names' window with the 'Vendor' tab selected. The 'Select Vendor' dropdown is set to 'Synergeyes'. The form contains the following fields and options:

- Name 1: Synergeyes
- Name 2: (empty)
- Address 1: 2232 Rutherford Rd
- Address 2: (empty)
- City: Carlsbad
- State: California
- ZIP Code: 92008
- Contact: (empty)
- Type: Contact Lens Manufacturer
- Web Site: (empty)
- E-Mail: (empty)
- Phone1 #: 7604769410
- Phone2 #: (empty)
- Fax #: (empty)
- Account #: (empty)
- Products/Services Provided:
 - ☐ Frames
 - ☒ Contact Lenses
 - ☐ Lenses
 - ☐ Other
 - ☐ Lab
- Frame Designers/Collections:
 - ☐ VSP Lab
 - ☐ Use VSP Approved Lab

Buttons at the bottom: OK, Cancel, **New**, Delete.

5 Click **Frame Designers/Collections**, if available, to open the Maintain Data window and modify and delete the vendor's frame designers and collections.

6 Click **OK** to save the vendor information and exit the Business Names window.

► To modify or add places of service

1 On the OfficeMate main window, click **Setup**, and select **Business Names**.
The **Business Names** window opens.

2 Click the **Place of Service** tab.

3 Click **New** to add a new place of service.

OR

Select a vendor from the **Select Place of Service** drop-down menu to modify a place of service.

- 4 Type text into the text boxes and choose appropriate options from the drop-down menus.
- 5 Type the service facility NPI number in the **NPI # (32a)** text box.
- 6 Select a qualifier from the **Qualifier (32b)** drop-down menu.

Note

Ensure that you are selecting the appropriate qualifier description and ANSI code in the Qualifier (32b) drop-down menu, as listed below:

Blue Cross Provider Number - 1A
 Blue Shield Provider Number - 1B
 CHAMPUS Identification Number - 1H
 Clinical Lab. Improvement Amendment Number - X4
 Federal Tax Payer's Identification Number - TJ
 Location Number - LU
 Medicaid Provider Number - ID
 Medicare Provider Number - 1C
 Provider Commercial Number - G2
 Provider Plan Network Identification Number - N5
 Provider Taxonomy - ZZ
 Provider UPIN Number - 1G
 State Industrial Accident Provider Number - X5
 State License Number - 0B

- 7 Type the facility ID in the **Facility ID (32b)** text box.

The screenshot shows the 'Business Names' window with the 'Place of Service' tab active. The form is populated with the following data:

Name 1(32)	Irvine Nursing Home	Phone #	(949) 698-6999
Name 2		Fax #	(949) 998-9789
Address 1(32)	123 West Street	NPI # (32a)	1234569878
Address 2(32)		Qualifier (32b)	Location Number
City (32)	Irvine	Facility ID (32b)	321547
State (32)	California		
ZIP Code (32)	92618		
Contact	Sally		
Facility Type	Skilled Nursing Facility		

At the bottom of the window, there are four buttons: OK, Cancel, New (highlighted), and Delete.

- 8 Click **OK** to save the place of service information and exit the Business Names window.

► **To modify or add referring doctors**

- 1 On the OfficeMate main window, click **Setup**, and select **Business Names**.
The **Business Names** window opens.
- 2 Click the **Referring Dr.** tab.
- 3 Click **New** to add a new referring doctor.
OR
Select a referring doctor from the **Select Referring Dr.** drop-down menu to modify a referring doctor.
- 4 Type text into the text boxes and choose appropriate options from the drop-down menus.
- 5 Type the referring provider's NPI number in the **NPI Number (17b)** text box.
- 6 Select a qualifier from the **Qualifier (17a)** drop-down menu.

Note

Ensure that you are selecting the appropriate qualifier description and ANSI code in the Qualifier (17a) drop-down menu, as listed below:

Blue Shield Provider Number - 1B
CHAMPUS Identification Number - 1H
Employer's Identification Number - EI
Location Number - LU
Medicaid Provider Number - ID
Medicare Provider Number - 1C
Provider Commercial Number - G2
Provider Plan Network Identification Number - N5
Provider Taxonomy - ZZ
Provider UPIN Number - 1G
Social Security Number - SY
State Industrial Accident Provider Number - X5
State License Number - 0B

- 7 Type the other ID in the **Other ID (17a)** text box.

The **Business Names** dialog box is shown with the **Referring Dr.** tab selected. The **Other ID (17a)** text box is highlighted with a red box. The form contains the following fields:

- Select Referring Dr.:** Smith, Joe
- Last Name (17):** Smith
- First Name (17):** Joe
- Address 1:** 123 Main Street
- Address 2:**
- City:** Helena
- State:** Ohio
- ZIP Code:** 43435
- Phone #:** (456) 789-9877
- Fax #:** (789) 789-7899
- Pager:**
- E-Mail:**
- UPIN/USIN #:** 23569+5
- NPI Number (17b):** 321654987
- EIN Number:**
- Qualifier (17a):** Employer's Identification
- Other ID (17a):** 12345648945
- Title:** Dr.
- Salutation:** Dear:
- Note:**

Buttons at the bottom: OK, Cancel, **New**, Delete. A **Referral History...** button is also present.

- 8 Click **Referral History**, if active, to view the referral history information for a selected doctor.

The **The Eye Surgery Institute Referrals Info...** dialog box is shown. It displays the following information:

- Referred In:**
- # of Patients:** 2
- \$ Generated:** \$6201.98

Patient Name	Date In
Underwood, Jennifer	06/30/2004
Ressler, Margaret	02/13/2002

Close button at the bottom right.

- 9 Click **OK** to save the referring doctor information and exit the Business Names window.

► To modify or add insurance information

1 On the OfficeMate main window, click **Setup**, and select **Business Names**. The **Business Names** window opens.

2 Click the **Insurance** tab.

3 Click **New** to add a new insurance carrier.

OR

Select an insurance carrier from the **Select Insurance** drop-down menu to modify an insurance carrier.

4 Type text into the **Name**, **Address**, **City**, **State**, **ZIP Code**, **Phone #**, **Fax #**, and **Contact** text boxes or choose appropriate options from the drop-down menus.

Note

If you are filing DMERC claims in an ANSI format for this insurance carrier, the insurance carrier's name must have "DMERC" in it. For example, if the insurance carrier is Medicare, type "Medicare DMERC" in the Name text box.

5 Select the type of insurance from the **Type** drop-down menu. For all Blue Cross and Blue Shield payers, select **Blue Shield**; for all Medicare, DMERC, and Railroad Medicare payers, select **Medicare**; for all Medicaid payers, select **Medicaid**; and for all other payers, select **Commercial**.

6 Type the percentage of the fee that the insurance carrier will pay in the **Coverage %** text box.

Note

If the insurance carrier has a fee schedule, type **100** in the Coverage % text box.

- 7 Select the **Print Business Address in Box 32** check box to automatically populate box 32 on the CMS 1500 form with the facility where services were rendered (if different than home or office).
- 8 If you are submitting insurance claims electronically, follow the instructions below:
 - a. Type the destination ID provided by your electronic claims company or clearinghouse in the **Destination ID** text box.

Note

If you are entering a destination ID for NFS files, type the destination ID provided by your electronic claims company or clearinghouse or type **000**.

- b. If the payer directory shows that the insurance carrier has a payor ID, type the payor ID in the **Payor ID** text box.

Note

If you are processing insurance claims through McKesson, type the CPID in the **Payor ID** text box.

- c. If the payer directory shows that the insurance carrier has a payor sub ID, type the payor sub ID in the **Payor Sub ID** text box.
 - d. Select the **Print Name & Address on CMS** check box if you want the insurance carrier's name and address to print on the CMS form.
 - e. Select the **Process Electronic Claims** check box.
 - f. Select an appropriate format from the **Electronic Receivers** drop-down menu.
- 9 Select the **Auto populate PQRI coding** check box to select to automatically apply PQRI codes on exams in ExamWRITER for patients who use a specific insurance carrier.

Note

After designating PQRI diagnosis codes and level II procedure codes and selecting to auto populate PQRI codes for select insurance companies, you will not receive a reminder on fee slips on which the insurance company is billed, level II procedure codes are recorded, and \$0 fees are billed. Also, you will not receive the "Line Item cannot have ZERO" error in the Third Party Processing window. If all of the items on an insurance claim are level II procedure codes, then you can submit a \$0 balance insurance claim.

- 10 Select the **Auto populate Box 17** check box to autopopulate box 17 on the CMS 1500 form with the patient's referring physician's name when the patient uses the selected insurance carrier.
- 11 Select the **Populate Box 17 with billing provider** check box (in addition to the **Auto populate Box 17** check box) to autopopulate box 17 on the CMS 1500 form with the patient's billing provider's name (recorded on the fee slip) when the patient uses the selected insurance carrier.

- 12 To add an insurance plan, click **Insurance Plan** and follow the instructions below:
- Select an available plan or group from the **Available Plans (Groups)** box or click **New** to add a new insurance plan.
 - Type text into the **Name**, **Plan Type**, **Employer**, **Group #**, **Effective Date**, and **Expiration Date** text boxes or choose appropriate options from the drop-down menus.
 - Type or select the number of months that must pass between exams for an insurance carrier to pay for the exam in the **Exam Elig. Period** text box, if applicable.

- Select a recall type from the **Recall Type** drop-down menu if you want to display the exam eligibility period when the selected recall type is chosen for the patient.
- Type the percentage of the fee that the insurance carrier will pay in the **Coverage %** text box.

Note	If the insurance carrier has a fee schedule, type 100 in the Coverage % text box.
-------------	--

- Click **OK**.

- 13 To add fee schedule information for an insurance carrier, click **Fee Schedule** and follow the instructions below:
 - a. Select an insurance fee type from the **Insurance Fee Type** column drop-down menu.
 - b. Type the amount of money that the insurance carrier pays in the **Amount** column.

For more information on setting up fee schedules, see the “[OSSU 108 Setting Up Fee Schedules & Special Pricing](#)” iTrain.

Insurance Fee Type	Amount
AddOn-GI MF	
AddOn-GI SV	
BF Executive	
BF FT 25-28	
BF FT 35	
Coating - AR	

- c. Click **OK**.

► To modify or add appointment schedule resources

- 1 On the OfficeMate main window, click **Setup**, and select **Business Names**. The **Business Names** window opens.
- 2 Click the **Resource** tab.
- 3 Click **New** to add a new resource and type the resource name in the **Resource Name** text box.

OR

Select a resource from the **Resource** drop-down menu to modify a resource.

Note

You should only delete resources if they are *not* linked to any appointments.

- 4 Select the **Active** Yes or No radio button, depending on whether or not the resource is active or inactive.

Resource Name	Active
Marco Capture	<input checked="" type="checkbox"/>
Topcon ImageNET 2000	<input checked="" type="checkbox"/>

Resource Name	Marco Capture
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

OK Cancel New Delete

- 5 Click **OK**.

Customizing Security Preferences

This section tells you how to assign or modify security preferences in OfficeMate. Users that have the **Access All** or **Maintain User Security** check box selected in the User Security for Employee window can change any user's security preferences.

For more information on setting up security, see the "OSSU 111 Setting Up Security" iTrain.

- 1 On the OfficeMate main window, click **Setup**, and select **Security**.
The **User Security for Employee** window opens.
- 2 Select the user for whom you want to assign security access privileges. If the user is not listed, add him or her to OfficeMate and assign him or her a user ID in the Business Names window. To add a user to OfficeMate, go to [To modify or add provider & staff names on page 50](#).
- 3 Type the user's password in the **Password** and **Confirm PW** text boxes.
- 4 Select the appropriate check boxes under the **Security Access** tab.

Note

Ensure that the **Access All** check box is selected for at least one user.

- 5 If applicable, select the **Locked Recorded by to Logged In User** check box to identify the logged in user as the person who is recording transactions (“Recorded By” person) in OfficeMate and lock the Recorded By drop-down menus throughout OfficeMate.

User ID	User Name	Password	Confirm PW
TDMD	Duncan, Tom	****	****
HELENF	Franklin, Helen		
MICHAELM	Miller, O.D., Michael		
RAYMONDR	Ruiz, M.D., Raymond		
DAVIDT	Thomas, O.D., David		

Security Access

ExamWRITER Security Other EW Access Options

- ☒ Access All
- ☐ Delete Patient
- ☐ Change Fee Slips, Adjustments, Record Returns And Refund Patient Credit
- ☐ Record Patient Credit Card Information
- ☐ Print Secured Reports
- ☐ Setup Business Names, Customization, Preferences, Scheduler
- ☐ Maintain Products
- ☐ Record Receipts
- ☐ Maintain User Security
- ☐ Electronic Claims
- ☐ Commission
- ☐ ExamWRITER
- ☐ Inventory

☒ **Security Active?**

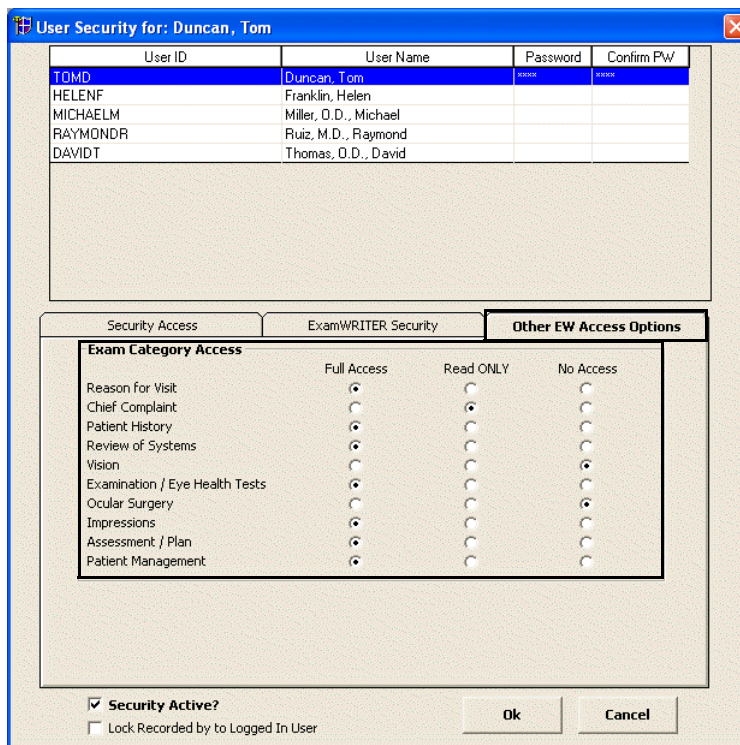
☐ Lock Recorded by to Logged In User

Ok Cancel

Notes

- If you select the **Security Active?** check box and do not select the **Locked Recorded by to Logged In User** check box, OfficeMate defaults to identifying the person who is recording transactions (“Recorded By” person) in OfficeMate as the user who is logged in to OfficeMate. If you want to change the default selection, select a different name from the **Recorded By** drop-down menu in a transaction window.
- If you do *not* select the **Security Active?** check box and do not select the **Locked Recorded by to Logged In User** check box, you must select the person who is recording transactions (“Recorded By” person) in OfficeMate from a drop-down menu in a transaction window.

- 8 If you are an ExamWRITER user, click the **Other EW Access Options** tab and select the appropriate Full Access, Read ONLY, and No Access radio buttons; otherwise, go to step 9.



The dialog box titled "User Security for: Duncan, Tom" contains a table of users and a section for "Other EW Access Options".

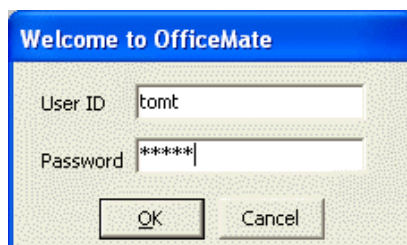
User ID	User Name	Password	Confirm P/W
TOMD	Duncan, Tom	****	****
HELENF	Franklin, Helen		
MICHAELM	Miller, D.D., Michael		
RAYMONDR	Ruiz, M.D., Raymond		
DAVIDT	Thomas, D.D., David		

Below the table are three tabs: "Security Access", "ExamWRITER Security", and "Other EW Access Options". The "Other EW Access Options" tab is selected, showing a table for "Exam Category Access".

Exam Category Access	Full Access	Read ONLY	No Access
Reason for Visit	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chief Complaint	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patient History	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Review of Systems	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vision	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Examination / Eye Health Tests	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ocular Surgery	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Impressions	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment / Plan	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patient Management	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

At the bottom, there is a checkbox for "Security Active?" which is checked, and a checkbox for "Lock Recorded by to Logged In User" which is unchecked. "Ok" and "Cancel" buttons are at the bottom right.

- 9 Select the **Security Active?** check box to activate security.
- 10 Click **OK**.
- 11 If you activated security, type your user ID and password in the **Welcome to OfficeMate** window and click **OK**.



The "Welcome to OfficeMate" dialog box has two input fields: "User ID" with the text "tomt" and "Password" with masked characters "*****". "OK" and "Cancel" buttons are at the bottom.

Changing Your Password

Users that have the **Access All** or **Maintain User Security** check box selected in the User Security for Employee window can change any user's password.

- 1 On the OfficeMate main window, click **Setup**, and select **Password Change**. The **Change Password** window opens.
- 2 Type your old password in the **Old Password** text box.

Note

If the old password has been forgotten, the licensed owner of the software must call the OfficeMate Client Services team at 1.800.942.5353.

- 3 Type your new password in the **New Password** text box.
- 4 Type your new password in the **Confirm New Password** text box.



- 5 Click **OK**.

Maintaining Add-In Programs

Add-ins are programs that you can add to the OfficeMate main window toolbar and quickly and easily open while you are using OfficeMate. OfficeMate is installed with the Windows Calculator, Explorer, and Wordpad add-in programs already set up. To add, delete, or modify add-in programs, follow the instructions below:

- 1 From the OfficeMate main window, click **Setup**, and select **Add-Ins**. The **Maintain Add-Ins** window opens.
- 2 Type new a program name in a blank row in the **Program Name** column.
OR

Place your cursor in a program name in the **Program Name** column and edit it or click **Delete Line** to delete the program from the OfficeMate main window toolbar Add-Ins menu.

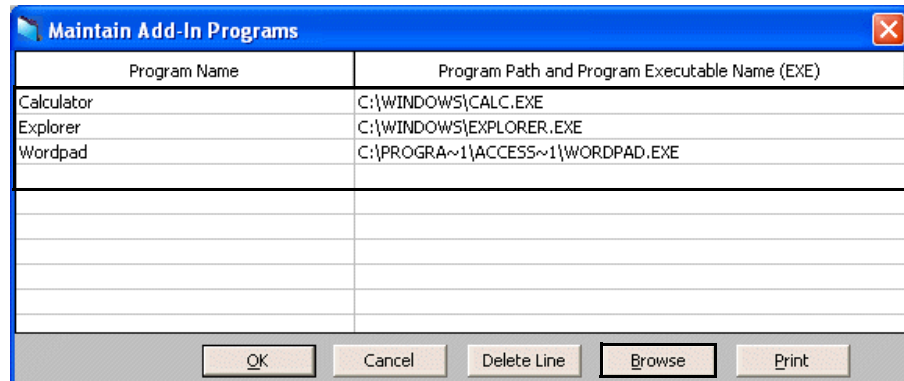
- 3 Type the new program's path and executable (exe) file in the **Program Path and Program Executable Name (EXE)** column.

OR

Click **Browse**, navigate to the program's executable file, and click **Open**.

Note

You can only add new add-in programs that exist on your computer's hard drive.



- 4 Click **Print** to print a the Maintain Add-Ins Program window.
- 5 Click **OK**.
- 6 From the OfficeMate main window, click **Add-Ins**, and select the add-in program to open it.

Defining & Changing Preferences

This section tells you how to define and change preferences in OfficeMate, including how

For more information on defining and changing preferences in OfficeMate, see the "OSSU 104 Setting Up Preferences" iTrain and the OSSU 100-2, "Setting Up Business Names, Preferences, the Appointment Scheduler, & the Quick List," training course.

- [To define and change patient preferences, 68](#)
- [To define and change other preferences, 69](#)
- [To define and change label printer preferences, 70](#)
- [To define and change one-click document preferences, 70](#)
- [To define and change statement preferences, 72](#)
- [To define and change CMS preferences, 73](#)

Note

You can change your OfficeMate preferences at any time.

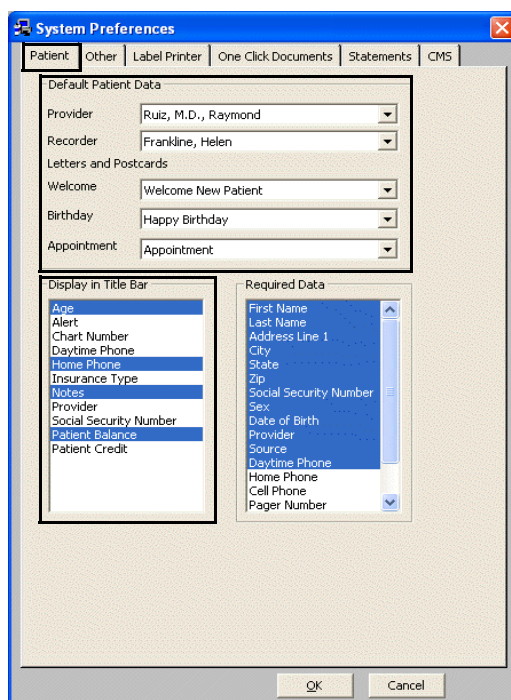
► To define and change patient preferences

- 1 From the OfficeMate main window, click **Setup**, and select **Preferences**.
The **System Preferences** window opens.
- 2 Select appropriate options from the **Provider**, **Recorder**, **Welcome**, **Birthday**, and **Appointment** drop-down menus in the Default Patient Data and Letters and Postcards boxes.

Note

If the **Security Active?** and **Lock Recorded by to Logged In User** check boxes are selected in the User Security for Employee window, the Recorder drop-down menu does not appear. For more information on security, go to [Customizing Security Preferences on page 62](#).

- 3 Select or deselect items in the **Display in Title Bar** box to choose the information that you want to display next to the patient's name in the Patient Demographic window title bar.



- 4 Select or deselect items in the **Required Data** box to choose the information that you want to appear in yellow in the Patient Demographic window.

Note

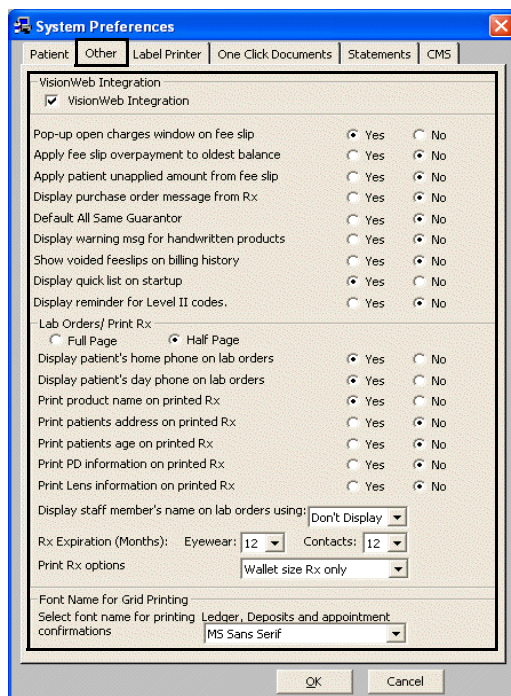
The items that you choose are only a visual prompt to remind you what information you require for patients; however, a patient record can be created without completing all of the required data fields in the Patient Demographic window.

- 5 Click **OK** to save your preferences and close the System Preferences window.

For more information on using VisionWeb, see the “[OSSU 304 Transmitting Lab Orders Through VisionWeb](#)” iTrain.

► To define and change other preferences

- 1 From the OfficeMate main window, click **Setup**, and select **Preferences**. The **System Preferences** window opens.
- 2 Click the **Other** tab.
- 3 Select the **VisionWeb Integration** check box if you are integrating with VisionWeb.
- 4 Select the **Yes** and **No** radio buttons to choose the other options.
- 5 Select the **Full Page** or **Half Page** radio button to print your lab orders on a full or half pages.
- 6 Select the **Don't Display**, **Fit By**, or **Ordered By** option from the Display staff member's name on lab order using drop-down menu.
- 7 Select the appropriate default Eyewear and Contacts **Rx Expiration (Months)**.
- 8 Select a font type from the **Font Name for Grid Printing** drop-down menu.



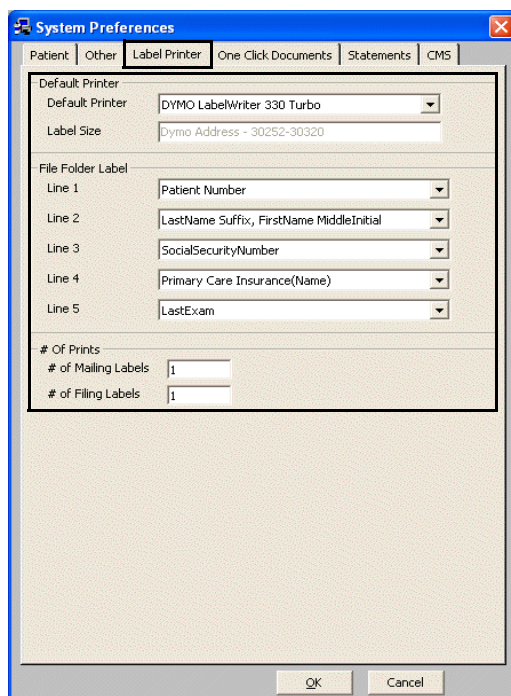
- 9 Click **OK** to save your preferences and close the System Preferences window.

► To define and change label printer preferences

Note

You must complete the instructions in this section before you print mailing or filing folder labels.

- 1 From the OfficeMate main window, click **Setup**, and select **Preferences**. The **System Preferences** window opens.
- 2 Click the **Label Printer** tab.
- 3 Select the default printer and label size from the **Default Printer** box drop-down menus.
- 4 Select file folder label lines from the **File Folder Label** drop-down menus.
- 5 Type the number of mailing and filing labels to print in the **# of Prints** box text boxes.



- 6 Click **OK** to save your preferences and close the System Preferences window.

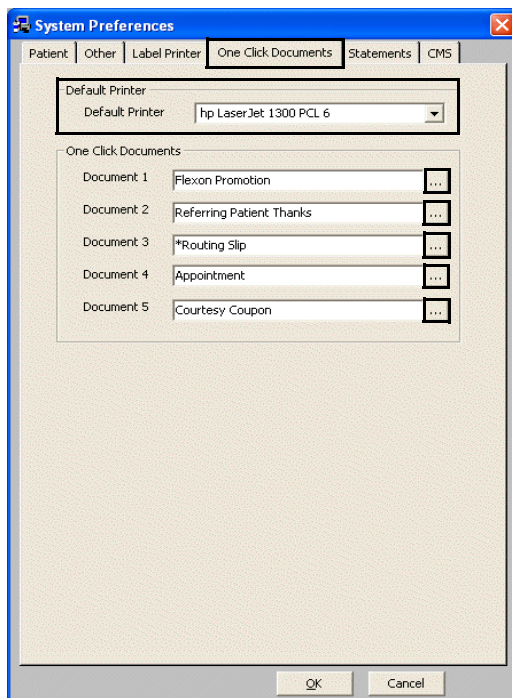
► To define and change one-click document preferences

Note

For information on creating and editing one-click documents, go to [Maintaining Documents on page 495](#).

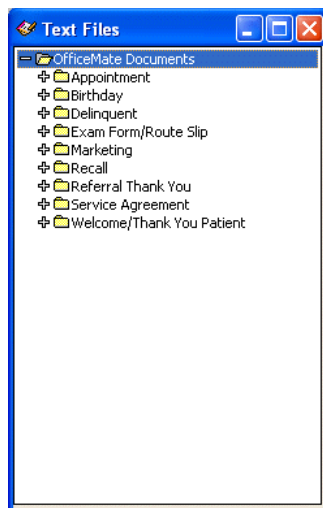
- 1 From the OfficeMate main window, click **Setup**, and select **Preferences**. The **System Preferences** window opens.
- 2 Click the **One Click Documents** tab.
- 3 Select the default printer from the **Default Printer** box drop-down menu.

- 4 Click the ... (ellipses) in the **One Click Documents** box to select one click documents.



The **Text Files** window opens.

- 5 Click the + next to OfficeMate Documents to expand the folder.



- 6 Navigate to and double-click the document that you want to select as a one click document.
- 7 Click **OK** to save your preferences and close the System Preferences window.

► To define and change statement preferences

- 1 From the OfficeMate main window, click **Setup**, and select **Preferences**.
The **System Preferences** window opens.
- 2 Click the **Statements** tab.
- 3 Select the **Yes** and **No** radio buttons to choose the statement options.
- 4 Type the number of days that you want to be displayed in detail on your statements in the **Display # days from period end** text box.
- 5 If you want to calculate late charges for patients, follow the instructions below; otherwise, go to step 6.
 - a. Select the **Calculate late charges** check box.
 - b. Type the late charge amount, the amount at which late charges should begin to be calculated, the grace period, and a description of the late charge.
 - c. Select the **Fee Slip Date** radio button if you want to calculate finance charges for insurance transfers based on fee slip dates or select the **Transfer Date** radio button if you want to calculate finance charges for insurance transfers based on transfer dates.
- 6 If you want to calculate finance charges for patient, follow the instructions below; otherwise, go to step 7.
 - a. Select the **Calculate finance charges** check box.
 - b. Type the monthly percentage, grace period, and a description of the finance charge.
 - c. Select the **Fee Slip Date** radio button if you want to calculate finance charges for insurance transfers based on fee slip dates or select the **Transfer Date** radio button if you want to calculate finance charges for insurance transfers based on transfer dates.
- 7 Type a message in the **Print this message at bottom of Statement** text box.

- 8 Type or select the payment due date from the **Payment due date** menu.

The screenshot shows the 'System Preferences' window with the 'CMS' tab selected. The window contains several sections for configuring statement preferences:

- General Settings:**
 - Use "Do not print on patient statement": ☐ Yes ☒ No
 - Print provider license on statement: ☐ Yes ☒ No
 - Display details (# days from period end): 30
 - Print insurance charges/payments: ☒ Yes ☐ No
 - Print reason for insurance denial: ☒ Yes ☐ No
- Late Charges:**
 - ☒ Calculate late charges
 - Late charge amount: \$15.00
 - Apply if balance >= \$0.00
 - Grace period (# days): 30
 - Late charge description: Billing Fee
 - Calculate late charges using: ☐ Fee Slip Date ☒ Transfer Date
- Finance Charges:**
 - ☒ Calculate finance charges
 - Monthly percentage: 0
 - Grace period (# days): 30
 - Finance charge description: Finance Charge
 - Calculate finance charge for insurance transfers using: ☒ Fee Slip Date ☐ Transfer Date
- Footer:**
 - Print this message at bottom of Statement: Thank you for your confidence and trust.
 - Payment due date: 08/21/2002

Buttons at the bottom: OK, Cancel.

- 9 Click **OK** to save your preferences and close the System Preferences window.

► To define and change CMS preferences

- From the OfficeMate main window, click **Setup**, and select **Preferences**. The **System Preferences** window opens.
- Click the **CMS** tab.
- Select the **Yes** or **No** Bill 100% to patient on fee slip radio button.
- Select the **Yes** or **No** Display Sales tax on CMS radio button.
- Select one other **Sales Tax on CMS Option**.

Notes

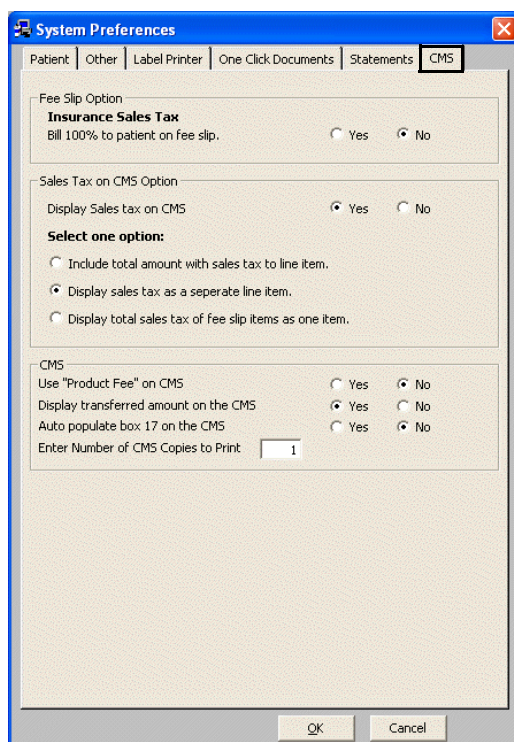
- If you select the **Include total amount with sales tax to line item** radio button the product fee and sales tax will be added together and will display as one amount in box 24F on the CMS 1500 form.
- If you select the **Display sales tax as a separate line item** radio button, the product fee and sales tax will display on two separate lines in box 24F on the CMS 1500 form.
- If you select the **Display total sales tax of fee slip items as one item** radio button and you are submitting multiple products and services with sales tax, all of the sales taxes will display on one line in box 24F on the CMS 1500 form.

- 6 Select the **Yes** and **No** radio buttons to choose the CMS options.

Note

If the Display transferred amount on the CMS **Yes** radio button is selected, only the transferred amount is displayed in box 24F on the CMS. If the Display transferred amount on CMS **No** radio button is selected, the product fee is displayed on the CMS in box 24F.

- 7 Type the number of CMS copies that you want to print in the **Enter Number of CMS Copies to Print** text box.



The screenshot shows the 'System Preferences' window with the 'CMS' tab selected. The window has a blue title bar and a tabbed interface with tabs for 'Patient', 'Other', 'Label Printer', 'One Click Documents', 'Statements', and 'CMS'. The 'CMS' tab is active, showing several sections with radio button options:

- Fee Slip Option:**
 - Insurance Sales Tax:** Bill 100% to patient on fee slip. (Yes/No radio buttons, 'No' is selected)
- Sales Tax on CMS Option:**
 - Display Sales tax on CMS (Yes/No radio buttons, 'Yes' is selected)
 - Select one option:**
 - Include total amount with sales tax to line item. (radio button)
 - Display sales tax as a separate line item. (radio button, selected)
 - Display total sales tax of fee slip items as one item. (radio button)
- CMS:**
 - Use "Product Fee" on CMS (Yes/No radio buttons, 'No' is selected)
 - Display transferred amount on the CMS (Yes/No radio buttons, 'Yes' is selected)
 - Auto populate box 17 on the CMS (Yes/No radio buttons, 'No' is selected)
 - Enter Number of CMS Copies to Print: 1 (text box)

At the bottom of the window are 'OK' and 'Cancel' buttons.

- 8 Click **OK** to save your preferences and close the System Preferences window.

Loading Lens Products into OfficeMate

The Lens Product Loader window loads a comprehensive list of over 1,300 lens products and add-ons provided by VSP into the OfficeMate products database.

Note

You do not need to be using the OfficeMate VSP Interface to use the Lens Product Loader.

- 1 Click **Tasks** and select **Lens Product Loader**.
- 2 Click **Update** to download updated products from VSP to OfficeMate.
The updated products download. This may take several minutes. Products highlighted green have already been loaded into OfficeMate and mapped correctly to VSP products.
- 3 Select **Add-Ons**, **Lens Options**, or **Ophthalmic Lenses** from the **Product Type** drop-down menu.
- 4 If you want to search for a specific product or product type, type part of the product description in the **Product Name** text box and click **Find**.
- 5 Select the product(s) that you want to load into OfficeMate.
OR
Click **Select all** to select all of the products in the results list.

- 6 Click the plus sign (+) next to ophthalmic lens product descriptions and modify the fee prices in the **Option Fee** column, if desired.

Notes

- Ophthalmic lens product fees include the lens base price and all of the optional fees. The optional fees are features inherent to the lens that carry an additional charge. These fees display in the Eyewear Order window in the Add-Ons box and are used by the Patient Out-of-Pocket Expense Calculator to provide descriptions on fee slips.
- If you modify a fee in the OfficeMate Lens Product Loader for a product that has already been loaded into OfficeMate and you reload the product into OfficeMate, the fee is updated in the OfficeMate Products database.

OfficeMate Lens Product Loader

Product Type: Find

Product Name:

Description	Category	Mat Group	Material	Type	Color	Coating	Total Fee	Selected						
BF GH170 FT 28 Clr	Bifocal	Glass HI Index	GH170	Flat Top 28	Clear		0.00	<input checked="" type="checkbox"/>						
<table border="1"> <thead> <tr> <th>Option Description</th> <th>Option Fee</th> </tr> </thead> <tbody> <tr> <td>Base Price</td> <td>0.00</td> </tr> <tr> <td>Std Lens HI Ind Gl 1.60-1.80</td> <td>0.00</td> </tr> </tbody> </table>									Option Description	Option Fee	Base Price	0.00	Std Lens HI Ind Gl 1.60-1.80	0.00
Option Description	Option Fee													
Base Price	0.00													
Std Lens HI Ind Gl 1.60-1.80	0.00													
BF GH170 FT 28 PGX	Bifocal	Glass HI Index	GH170	Flat Top 28	Photo Gray Extra		0.00	<input checked="" type="checkbox"/>						
BF GL CT 25 Clr	Bifocal	Glass	GL	C 25	Clear		0.00	<input type="checkbox"/>						
BF GL CT 28 Clr	Bifocal	Glass	GL	Curve Top Seg 28	Clear		0.00	<input type="checkbox"/>						
BF GL CT 28 PBX	Bifocal	Glass	GL	Curve Top Seg 28	Photo Brown Extra		0.00	<input type="checkbox"/>						
BF GL Executive Clr	Bifocal	Glass	GL	Executive	Clear		0.00	<input checked="" type="checkbox"/>						
BF GL Executive PGX	Bifocal	Glass	GL	Executive	Photo Gray Extra		0.00	<input type="checkbox"/>						
BF GL FT 22 Clr	Bifocal	Glass	GL	Flat Top 22	Clear		0.00	<input type="checkbox"/>						
BF GL FT 22 PGX	Bifocal	Glass	GL	Flat Top 22	Photo Gray Extra		0.00	<input type="checkbox"/>						
BF GL FT 25 Clr	Bifocal	Glass	GL	Flat Top 25	Clear		0.00	<input checked="" type="checkbox"/>						
BF GL FT 25 Gy3	Bifocal	Glass	GL	Flat Top 25	Gray 3		0.00	<input type="checkbox"/>						
BF GL FT 25 PBX	Bifocal	Glass	GL	Flat Top 25	Photo Brown Extra		0.00	<input type="checkbox"/>						
BF GL FT 25 PGX	Bifocal	Glass	GL	Flat Top 25	Photo Gray Thin & L		0.00	<input checked="" type="checkbox"/>						
BF GL FT 25 PGX	Bifocal	Glass	GL	Flat Top 25	Photo Gray Extra		0.00	<input type="checkbox"/>						
BF GL FT 25 Pnk1	Bifocal	Glass	GL	Flat Top 25	Pink 1		0.00	<input type="checkbox"/>						
BF GL FT 28 AutGld	Bifocal	Glass	GL	Flat Top 28	Autumn Gold		0.00	<input type="checkbox"/>						
BF GL FT 28 Clr	Bifocal	Glass	GL	Flat Top 28	Clear		0.00	<input type="checkbox"/>						

Update Select all Un-Select All Load Close

Note

Use the table below to help you understand the ophthalmic lens product name descriptions.

Optthalmic Lens Product Name Abbreviations

Details	Abbreviation	Description
Lenstype	SV	Single Vision
	BF	Bifocal
	TF	Trifocal
	DS	Double Seg
	LBF	Lenticular Bifocal
	LSV	Lenticular Single Vision
	PG	Progressive
Material	PL	Plastic
	PO	Polycarbonate
	PM	Plastic Mid-Index (followed by a number indicating the index of refraction)
	PH	Plastic Hi-Index (followed by a number indicating the index of refraction)
	TR	Trivex
	GL	Glass
	GH	Glass Hi-Index (followed by a number indicating the index of refraction)
Brand Name	Varies	Varies
Color	Varies	Varies
Coating	Varies	Varies

7 Click **Load**.

The selected products are loaded into the OfficeMate.

Logging Out of OfficeMate

1 Close any open windows within OfficeMate.

2 Select **Logout** from the menu bar.

You are logged out, and the **Welcome to OfficeMate** window opens.

CHAPTER 2

Creating, Modifying, & Deleting Patient Records

In this chapter:

- [Creating & Opening Patient Records, 79](#)
- [Recording Patient Information, 83](#)
- [Attaching Electronic Documents to Patient Records, 101](#)
- [Printing Patient Labels, 105](#)
- [Viewing All Patient Information, 107](#)
- [Viewing Patient Appointments, 108](#)
- [Printing One-Click Patient Documents, 109](#)
- [Deleting Patient Records, 109](#)
- [Viewing & Deleting Patient Open Charges, 110](#)

Patient records contain demographic, insurance, marketing, recall, financial, and correspondence history information. The amount of information that you record for each patient depends on your office's policies and procedures.

Creating & Opening Patient Records

This section tells you how to create and open patient records in OfficeMate and includes the following topics:

- [Creating Patient Records, 80](#)
- [Opening Patient Records, 81](#)

Creating Patient Records

- 1 Open the Add New Patient window using one of the following methods:
 - Click the **Patients** icon to open the **Find Patient/Guarantor** window.
 - Click **Tasks** on the main window toolbar and select **Patients** to open the **Find Patient/Guarantor** window.
 - Click **F2 Find** on the OfficeMate Information Center window.
 - If a new patient has an appointment scheduled today, click on the patient's name in the OfficeMate Information Center window, drag and drop the patient on the **Patients** icon, and go to step 3.
- 2 Click **New**.

Find Patient / Guarantor

Selection Criteria

Last Name City

First Name Home Phone

Social Security No Patient No

Address Chart No

Date Of Birth

Name	Address / City	Home Phone	SS No	DOB	Patient	HIPAA	RFR

Patients Found: ☐ Include Inactive

The **Add New Patient Record** window opens.

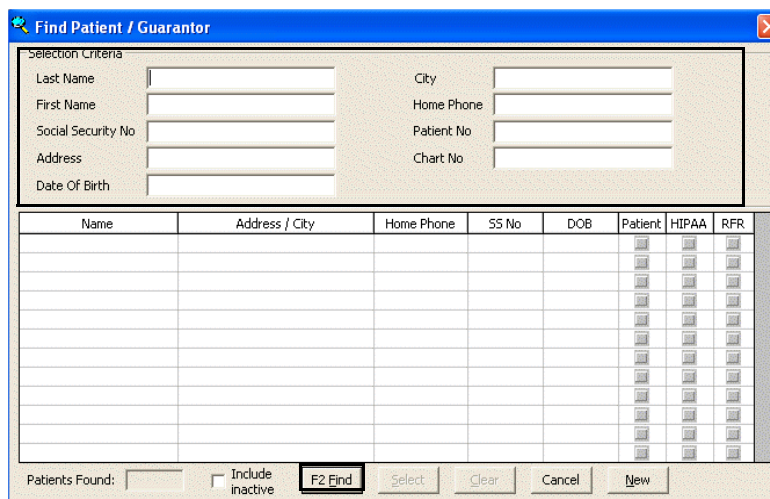
- 3 Follow the instructions in [Recording Patient Information on page 83](#) to record new patient information in the Demographic, Insurance, Marketing, Notes, Recall, Financial Info, Correspondence History, and HIPAAMate tabs. Follow

the instructions in [Attaching Electronic Documents to Patient Records](#) on page 101 to record information in the eDocuments tab.

Opening Patient Records

- 1 Open the Patient Demographic window using one of the following methods:
 - Click the **Patients** icon to open the **Find Patient/Guarantor** window.
 - Click **Tasks** on the main window toolbar and select **Patients** to open the **Find Patient/Guarantor** window.
 - Right-click on the Hard Lens Order, Soft Lens Order, Eyewear Order, Fee Slip, Receipts & Adjustments, or Patient Ledger window title bar and select **Patient**.
 - Right-click on a patient in the OfficeMate Information Center window, select **Patient**, and go to step 4.
 - Click on a patient's name in the OfficeMate Information Center window, drag and drop the patient on the **Patient** icon, and go to step 4.

- Enter search information in the **Selection Criteria** text boxes and click **F2 Find**.



The **Find Patient / Guarantor** window contains a **Selection Criteria** section with the following fields:

- Last Name
- First Name
- Social Security No
- Address
- Date Of Birth
- City
- Home Phone
- Patient No
- Chart No

Below the selection criteria is a table with the following columns: Name, Address / City, Home Phone, SS No, DOB, Patient, HIPAA, and RFR. The table is currently empty.

At the bottom of the window, there is a **Patients Found:** label, an **Include inactive** checkbox, and a row of buttons: **F2 Find**, **Select**, **Clear**, **Cancel**, and **New**.

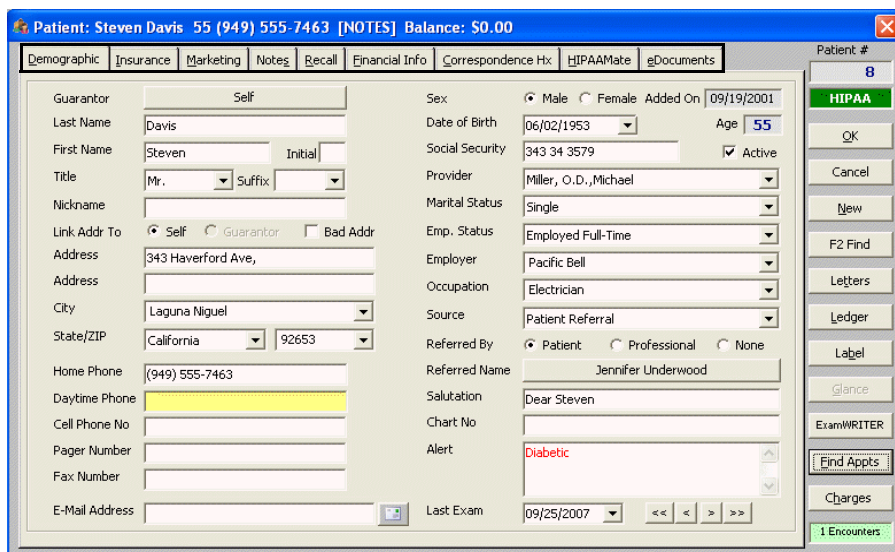
- Click on the patient and then click **Select**.

The **Patient** window opens.

Note

Click the arrows in the bottom right corner of the window to move to the next, last, previous, or first patient's record.

- Follow the instructions in [Recording Patient Information on page 83](#) to record new patient information in the Demographic, Insurance, Marketing, Notes, Recall, Financial Info, Correspondence History, and HIPAAMate tabs. Follow the instructions in [Attaching Electronic Documents to Patient Records on page 101](#) to record information in the eDocuments tab.



The **Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00** window displays patient information across several tabs: **Demographic**, **Insurance**, **Marketing**, **Notes**, **Recall**, **Financial Info**, **Correspondence Hx**, **HIPAAMate**, and **eDocuments**.

Demographic Tab:

- Guarantor:** Self
- Last Name:** Davis
- First Name:** Steven
- Title:** Mr.
- Nickname:**
- Link Addr To:** Self
- Address:** 343 Haverford Ave,
- City:** Laguna Niguel
- State/ZIP:** California 92653
- Home Phone:** (949) 555-7463
- Daytime Phone:**
- Cell Phone No:**
- Pager Number:**
- Fax Number:**
- E-Mail Address:**

Right Side Fields:

- Sex:** Male
- Date of Birth:** 06/02/1953
- Age:** 55
- Social Security:** 343 34 3579
- Provider:** Miller, O.D., Michael
- Marital Status:** Single
- Emp. Status:** Employed Full-Time
- Employer:** Pacific Bell
- Occupation:** Electrician
- Source:** Patient Referral
- Referred By:** Patient
- Referred Name:** Jennifer Underwood
- Salutation:** Dear Steven
- Chart No:**
- Alert:** Diabetic
- Last Exam:** 09/25/2007

Right Panel:

- Patient #:** 8
- HIPAA** (highlighted)
- OK
- Cancel
- New
- F2 Find
- Letters
- Ledger
- Label
- glance
- ExamWRITER
- Find Appts
- Charges
- 1 Encounters

Recording Patient Information

For more information on recording patient information, see the "OSSU 202 Checking In Patients" iTrain and the OSSU 200-1, "Checking In Patients," training course.

This section tells you how to record patient information, including how

- To record demographic information, 83
- To record insurance information, 89
- To record marketing information, 91
- To record patient notes, 93
- To record and review recall information, 93
- To record financial information, 94
- To view and print correspondence history, 96
- To record HIPAAMate Information, 97
- To select letters to send to a patient, 100

Notes

- To streamline the process of recording patient information in OfficeMate, add frequently used information to list box selections. For more information on adding list box selections, see [To add list box selections on page 34](#).
- To highlight the patient information fields that are required to be complete in your office and to choose the information to display in the Patient Demographic window title bar, modify your OfficeMate patient preferences. For more information, see [To define and change patient preferences on page 68](#).
- Refer to the **Encounters** box to view the number of exams, or "encounters," that a patient has had in ExamWRITER, if applicable.

► To record demographic information

Note

If you are an ExamWRITER user, any modifications or additions that you make to patient demographic information in OfficeMate will be reflected in ExamWRITER. Likewise, any modifications or additions that you make to patient demographic information in ExamWRITER will be reflected in OfficeMate.

- 1 Click the **Demographic** tab in the Patient Demographic window.

Note

Click the arrows in the bottom right corner of the window to move to the next, last, previous, or first patient's record.

- 2 To change the patient's guarantor, click the button next to Guarantor and follow the instructions below:

Notes

- A guarantor is the person who is responsible for paying the patient's account bills.
- If the patient is responsible for paying his or her own account bills, the guarantor is Self.
- Typically, family members have the same guarantor.
- If you link a patient's address to a guarantor and you modify the guarantor's address, the patient's address and all other family members' addresses linked to that guarantor will also be modified.

- a. If the patient's current guarantor is Self, enter search information in the Last Name, First Name, and SS No text boxes and click **F2 Find** to find and select an existing guarantor or click **New** and go to step b to create a new guarantor for the patient.

Name	Address/City	Home Phone	SS No

Total Records:

F2 Find **Select** **Clear** **Cancel** **New**

- b. If the patient's current guarantor is *not* Self, or if you are creating a new guarantor for the patient, complete the information in the Guarantor Information window or click **F2 Find** to find and select a different guarantor.

Notes

- Select the **Bad Address** check box if the guarantor's address is incorrect and you do not have a correct address on file.
- Select one or more **Mailing Options**. Selecting the **Head of Household** check box designates the guarantor as the person making decisions in the household. Selecting the **Mailing List** check box indicates that the guarantor is on your correspondence mailing list.
- Select one or more of the following **Actions**.
 - Selecting **Copy Last Name to Patient** copies the guarantor's last name to the patient's last name.
 - Selecting **Link Address to Patient** copies the guarantor's address to the patient's address.
 - If applicable, selecting **Unlink as Guarantor** removes the guarantor from the patient's record.
 - If you are going to bill an insurance company for this patient's services or products, select **Add as a New Patient** to add the guarantor as an OfficeMate patient. You must also record the guarantor's information in the Demographic and Insurance tabs in the Patient Demographic window. For more information on recording information in the Demographic and Insurance tabs see [To record demographic information on page 83](#) and [To record insurance information on page 89](#).
- A list of patients who are linked to the guarantor is displayed in the **Linked Patients** box.

- 3 Select or type the patient's name, address, phone number, and e-mail information in the appropriate yellow highlighted text boxes.

Notes

- To streamline the process of recording ZIP codes in OfficeMate, add frequently used ZIP codes to the ZIP code shortcut list. For more information on adding ZIP code shortcuts, see [To add ZIP code shortcuts on page 36](#).
- Click the button next to the patient's e-mail address to open your default e-mail client and send an e-mail message to the patient.

- 4 Select the **Self** or **Guarantor** radio button to link the patient's address to themselves or the patient's guarantor's address.
- 5 If the patient's address is incorrect and you do not have a correct address on file for the patient, select the **Bad Address** check box.
- 6 Select or type the patient's sex, date of birth, social security number, provider, marital status, employment status, employer, occupation, and referral source in the appropriate yellow highlighted text boxes.
- 7 If the patient is not an active patient, deselect the **Active** check box.
- 8 If the patient was referred to your office by another patient, follow the instructions below; otherwise, go to step 9 if the patient was referred to your office by a professional or go to step 10 if the patient was not referred by anyone.
 - a. Select the Referred By **Patient** radio button.
 - b. Click the button next to Referred Name to open the Find Patient window.
 - c. Enter search information in the **Selection Criteria** text boxes and click **F2 Find**.
 - d. Click on a patient and then click **Select**.

- 9 If the patient was referred to your office by a professional, follow the instructions below; otherwise, go to step 10 if the patient was not referred by anyone.

Note

If you select the name of a referring professional and if you selected the **Yes** radio button next to the Auto populate box 17 on the CMS system preference tab, information from the Referred Name field will automatically populate box 17 on the CMS 1500. To set up your CMS system preferences, see [To define and change CMS preferences on page 73](#).

- Select the Referred By **Professional** radio button.
- Click the button next to Referred Name to open the Find Professional Referral window.
- Click on a name and then click **Select** to select the professional as the patient's referring doctor or go to step d to create or edit a referring professional.

Note

If applicable, click **F2 Find** to search for a professional referral.

Name	Address/City	Bus. Phone
Institute, The Eye Surge	234 Lauderdale Drive, Newport Beach	
Scott, M.D., Jason	45698 Jamboree, Newport Beach	949 555 8632

Total Records: 2 F2 Find **Select** Clear Cancel New/Edit

- Click **New/Edit** to open the Maintain Referring Professionals window and add or edit a referring professional.

Select: Institute, The Eye Surgery

Last Name: Institute

First Name: The Eye Surgery

Address: 234 Lauderdale Drive

City: Newport Beach

State/ZIP: California 92660

OK Cancel New

- 10 If the patient was not referred to your office by anyone, select the Referred By **None** radio button.

- 11 Select or type the patient's salutation, chart number, medical alerts, and last exam date in the appropriate yellow highlighted text boxes.

Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00

Demographic Insurance Marketing Notes Recall Financial Info Correspondence Hx HIPAAMate gDocuments

Guarantor: Self

Last Name: Davis

First Name: Steven Initial:

Title: Mr. Suffix:

Nickname:

Link Addr To: ☒ Self ☐ Guarantor ☐ Bad Addr

Address: 343 Haverford Ave,

City: Laguna Niguel

State/ZIP: California 92653

Home Phone: (949) 555-7463

Daytime Phone:

Cell Phone No:

Pager Number:

Fax Number:

E-Mail Address:

Sex: ☒ Male ☐ Female Added On: 09/19/2001

Date of Birth: 06/02/1953 Age: 55

Social Security: 343 34 3579

Provider: Miller, O.D., Michael

Marital Status: Single

Emp. Status: Employed Full-Time

Employer: Pacific Bell

Occupation: Electrician

Source: Patient Referral

Referred By: ☒ Patient ☐ Professional ☐ None

Referred Name: Jennifer Underwood

Salutation: Dear Steven

Chart No:

Alert: Diabetic

Last Exam: 09/25/2007

Patient # 8

HIPAA

OK

Cancel

New

F2 Find

Letters

Ledger

Label

Glance

ExamWRITER

Find Appts

Charges

1 Encounters

- 12 Click **OK** to close the Patient Demographic window or follow the instructions in the sections below to continue adding or modifying patient information.

Notes

If a **List of Duplicate or Similar patient(s)** window opens, you have entered a patient name that is similar or identical to a name already stored in OfficeMate. Complete one of the following tasks to close the window:

- Click **Print** to print the list of patients.
- Click **Save as New Patient** to save the patient that you are entering into OfficeMate as a new patient.
- Click on a patient's name and then click **Update Patient** to update the patient that you are entering into OfficeMate with the selected duplicate patient's information.
- Click **Cancel Save** to cancel entering and saving the patient's information and close the List of Duplicate or Similar patient(s) and Patient Demographic window.

List of Duplicate or Similar patient(s)

Name	Address/City	Home Phone	SS No
Davis, Steven	343 Haverford Ave., Laguna Niguel	(949) 555-7463	343 34 3579

Print Save as New Patient Update Patient Cancel Save

► To record insurance information

Notes

- You must record a patient's insurance information before you bill the insurance company for any products or services that the patient purchased.
- You can record up to six insurance carriers for each patient. To add additional insurance carriers, click the arrows next to **Additional Insurance Carriers**; however, do *not* overwrite existing insurance carriers. Overwriting existing insurance carriers will affect prior insurance claims. Select the **Populate current insurance in box 9 on the CMS** check box to automatically populate box 9 on the CMS 1500 form with additional insurance carriers.

1 Ensure that you have recorded the patient's name, address, home phone number, sex, date of birth, social security number, marital status, and employment status in the Demographic tab.

2 Click the **Insurance** tab in the Patient Demographic window.

Note

To delete an insurance carrier, click **Delete**; however, do not delete an insurance carrier if you have already billed it for any patient charges. Deleting an insurance carrier that you have already billed will affect prior insurance claims.

3 Select the patient's insurance name from the **Insurance Name** drop-down menu.

Note

If you created a fee slip for the patient using the insurance name selected in the Insurance Name drop-down menu, you can click **CMS Form** to open, update, refresh, and print the CMS 1500 insurance form. For more information on fee slips, go to [Creating & Recording Fee Slips on page 189](#). For more information on modifying the CMS 1500 form, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#).

4 Type the insured ID number in the **Insured ID No** text box.

5 Type the policy group number in the **Policy Group No** text box.

6 Select the insurance plan's name from the **Plan Name** drop-down menu.

7 Type the co-payment percentage or dollar amount in the **Co Payment** text box and select the appropriate **Percentage %** or **Amount \$** radio button.

Note

If the patient has an insurance co-payment recorded in the Co Payment text box, a pop-up message will remind you about the co-payment when you bill the patient's insurance.

- 8 Select the patient's relationship to the insured from the **Relationship to Insured** drop-down menu.

Note

The information in the Relationship to Insured box in OfficeMate appears in Box 6 on the CMS 1500 form.

- 9 Select the insurance policy type from the **Policy Type** drop-down menu.
- 10 Select the type of HMO or PPO agreement from the **PPO/HMO** drop-down menu.
- 11 Select the Insured Party **Patient**, **Guarantor**, or **Other** radio button.

Note

If you selected the **Other** radio button, click **Not Assigned** to open the Find Other for Insurance window and find or create a new insured party.

- 12 If the patient has a signature on file with your office, follow the instructions below; otherwise, go to step 13.
 - a. Select the **Signature On File** check box.
 - b. Select the date the signature was filed from the **Date** calendar.
 - c. Select the signature source from the **Signature Source** drop-down menu.

The screenshot shows the 'Insurance Coverage' window in OfficeMate. The patient is Steven Davis, 55 (949) 555-7463, with a balance of \$0.00. The 'Insurance' tab is active. The 'Primary Insurance Carriers' section contains several fields: Insurance Name (Medical Eye Services), Insured ID No (343 34 3579), Policy Group No (HX - 3480), Plan Name, Co Payment (0), Relationship to Insured (Self), Policy Type (Group Policy), PPO/HMO (No PPO/HMO Agreement), and Insured Party (Patient selected). There are also checkboxes for Signature On File, Release Information?, Deceased?, Patient Retired?, and Spouse Retired?, each with a date field. A right-hand sidebar contains buttons for HIPAA, OK, Cancel, New, F2 Find, Letters, Ledger, Label, Glance, ExamWRITER, Find Appts, Charges, and 1 Encounters.

- 13 If the patient has authorized the release of his or her medical information to the insurance company so that the insurance company can process the patient's claims, select the **Release Information** check box and then select the date the patient released the information from the date calendar next to the check box.
- 14 If the patient is deceased, retired, or if his or her spouse is retired, select the appropriate **Deceased**, **Patient Retired**, or **Spouse Retired** check box and then select a date from the date calendar next to the check box.
- 15 Click **OK** to close the Patient Demographic window or follow the instructions in the sections below to continue adding or modifying patient information.

► To record marketing information

OfficeMate allows you to record patient marketing information and send optometric practice marketing materials to patients who have similar characteristics. Follow the instructions below to record marketing information for your patients.

Note To maintain marketing groups and categories in OfficeMate, see [To maintain marketing groups and categories on page 47](#).

- 1 Click the **Marketing** tab in the Patient Demographic window.
- 2 Select marketing groups and categories from the Marketing/Lifestyle Data box's **Group** and **Category** column drop-down menus.

Note To delete a group or category, select it and click **Delete Line**.

- 3 Select one or more of the following **Mailing Information** options.
 - Select the **Mailing List** check box to indicate that the patient is on your correspondence mailing list.
 - Select the **Head of Household** check box to designate the patient as the person making decisions in the household.
- 4 Select an insurance type from the **Insurance Type** drop-down menu.
- 5 Select the patient's ethnicity from the **Ethnicity** drop-down menu.

Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00

Demographic Insurance **Marketing** Notes Recall Financial Info Correspondence Hx HIPAAMate gDocuments

Patient # 8

Marketing / Lifestyle Data

Group	Category
Diagnosis	Diabetic
Occupational Hazards	Extended outdoors
Hobbies	Fishing

Delete Line

Mailing Information

☐ Mailing List

☒ Head of Household

Other

Insurance Type PPO

Ethnicity

Service Agreements & Lens Duplication Fees

Plan Name	Eff. Date	Months	Exp. Date	Contact Lens Name	F	With	W/O
					OD		
					OS		
					OD		
					OS		

Delete Plan

Buttons: OK, Cancel, New, F2 Find, Letters, Ledger, Label, Glance, ExamWRITER, Find Appts, Charges, 1 Encounters

- 6 Follow the instructions below to record marketing service agreements and contact lens duplication fees in the **Service Agreements & Lens Duplications Fees** table:

Notes

- To set up your service agreements, see [To create new service agreement renewal plans on page 41](#).
- To modify your service agreements, see [To modify service agreement renewal plans on page 42](#).
- To identify contact lens duplication fees, see [To identify contact lens duplication fees on page 44](#).

- Select a service agreement from the **Plan Name** drop-down menu.
- Type the date the service agreement becomes effective in the **Eff. Date** column or double-click your cursor in the Eff. Date column to open and select a date from a calendar.
- Type or select the number of months for each renewal year in the **Months** column.
- Type the date the service agreement expires in the **Exp. Date** column or double-click your cursor in the Exp. Date column to open and select a date from a calendar.
- Select a contact lens to duplicate in the **Contact Lens Name** drop-down menu.
- Click your cursor in the **With** and **W/O** columns to automatically populate them with the information that you set up when you customized your OfficeMate service agreements.

Note

To delete a service agreement, select the plan name and click **Delete Line**.

Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00

Demographic | Insurance | Marketing | Notes | Recall | Financial Info | Correspondence Hx | HIPAA Mate | eDocuments

Marketing / Lifestyle Data

Group	Category
Diagnosis	Diabetic
Occupational Hazards	Extended outdoors
Hobbies	Fishing

Mailing Information

☐ Mailing List

☒ Head of Household

Other

Insurance Type: PPO

Ethnicity:

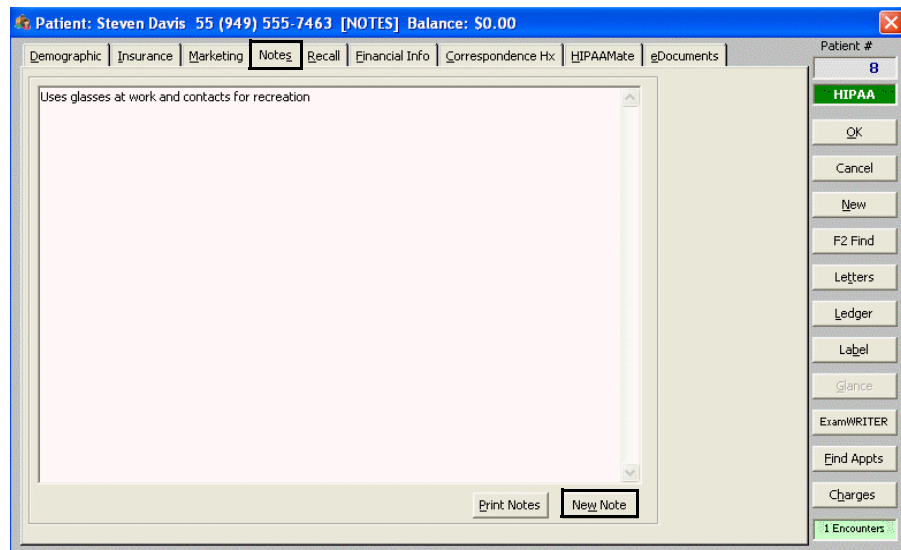
Service Agreements & Lens Duplication Fees

Plan Name	Eff. Date	Months	Exp. Date	Contact Lens Name	F	With	W/O
Disposable Lens Plan	08/26/2008	12	08/26/2009	Acuvue	OD	20.00	30.00
				OS			
				OD			
				OS			

1 Encounters

► To record patient notes

- 1 Click the **Notes** tab in the Patient Demographic window.
- 2 Click **New Note** to type a new patient note or place your cursor in a previous note to edit or delete it.



Note To print notes, click **Print Notes**.

► To record and review recall information

You can assign up to three recall schedules to a patient in the Patient Demographic window.

For more information on recalling patients, see the "OSSU 202 Checking In Patients" iTrain and the OSSU 200-1, "Checking In Patients," training course.

Note Before you assign recall schedules to a patient, see [To create new recall schedules on page 39](#) to create a new recall schedule or [To modify recall schedules on page 40](#) to modify an existing recall schedule.

- 1 Click the **Recall** tab in the Patient Demographic window.

Note You can view the recall history for the patient in the **Recall History** box.

- 2 Select recall types from the **Recall Type** drop-down menus.

- 3 To change the recall date, type or select the number of months until the next recall in the **Months to Recall** text box or type or select a recall date in the **Next Recall** text box.

Note

If the patient has an insurance plan with an eligibility period, the number of eligible months between exams will appear in the **Eligibility (months)** text box after you select a recall type.

Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00

Demographic Insurance Marketing Notes **Recall** Financial Info Correspondence Hx HIPAA Mate eDocuments

Recall For Steven Davis

Recall Type	Months to Recall	Next Recall	Eligibility (months)
12 Month	1	09/06/2008	
Glaucoma	6	02/01/2009	
	0		

Recall History

Print Date	Recall Type	Document Printed	Notice #
05/30/2002	Diabetic 12 month	Diabetic 2	2
03/28/2002	Diabetic 12 month	Diabetic 1	1
01/01/2002	CL recheck - 6 months	Contact Lens Recheck 2 PC	2
09/29/2001	CL recheck - 6 months	Contact Lens Recheck 1 PC	1
05/02/2001	Glaucoma	Glaucoma 2	2
05/02/2001	Diabetic 12 month	Diabetic 2	2

Patient # 8
 HIPAA
 OK
 Cancel
 New
 F2 Find
 Letters
 Ledger
 Label
 Glance
 ExamWRITER
 Find Appts
 Charges
 1 Encounters

► To record financial information

- 1 Click the **Financial** tab in the Patient Demographic window.
- 2 Select the patient's fee classification from the **Patient Fee Type** drop-down menu.
- 3 Select the **Send Statement** check box if you want to send financial statements to the patient.
- 4 Select the **Credit Limit** check box if the patient has a limit on the balance that they can owe you. Type or select the amount that you will risk on their account in the **Amount** text box.
- 5 Select the **Cash Only** check box if you only accept cash payments from this patient.
- 6 Select the **Send to Collection** check box if you have sent the patient's account to your collection agency.
- 7 Select the **Apply Finance Charge** check box to charge the patient a percentage of their overdue balance when you send them a financial statement.

- 8 Select the **Apply Late Charge** check box to add an additional amount to the patient's statements with outstanding balances.

- 9 Type and select the patient driver's license number, expiration date, and state in the **Driver's License** box.
- 10 Click **Credit Card** and enter the patient's credit card number, cardholder name, credit card type, and expiration date in the **Credit Card Information** box.
- 11 To comply with the Safeguard - Red Flags Rule from the Federal Trade Commission (FTC) and the Nation Credit Union Administration (NCUA) and ensure the security and confidentiality of your patients' information, follow the instructions below:
- Select the appropriate **Credit Card**, **Driver's License/Photo Id**, and **Insurance Card** radio buttons to indicate whether or not you have verified that the patient's identity matches the types of identification listed.

Note

- You *must* select a radio button for each type of identification.
- When you select the radio buttons in the Identity Safeguard - Red Flag Rule section on the Financial Info tab, the current date is populated in the Start Date field and an end date one year from the start date is populated in the End Date field. These dates are updated when information is modified in this section.

- Select the **Received notification of possible identity theft** check box if you have received a notification that the patient's identity may have been stolen.

- c. Type text in the **Notes** text box to add notes about the patient's security and identity information, if desired.

Note

A colored RFR box or column on the OfficeMate Information Center, Patient Demographic, Fee Slip, Receipts & Adjustments, and Find Patient/Guarantor windows relates to the following meanings:

- A *green* RFR box indicates that either Yes or Not Provided is selected for all of the identification radio buttons on the Financial Info tab in the Patient window. If a patient's RFR box is green, a message will also appear on various windows throughout OfficeMate reminding you that the patient's ID matches the identification types in the Financial Info tab.
- A *yellow* RFR box indicates that one or more of the identification radio buttons on the Financial Info tab in the Patient window is not selected. A yellow RFR box also indicates that the current date is beyond the End Date in the Identity Safeguard - Red Flag Rule section on the Financial Info tab. If a patient's RFR box is yellow, a message will also appear on various windows throughout OfficeMate reminding you that the patient's ID does not match the identification types in the Financial Info tab.
- A *red* RFR box indicates that No is selected for one or more of the identification radio buttons on the Financial Info tab in the Patient window. A red RFR box also indicates that the Received notification of possible identity theft check box is selected. If a patient's RFR box is red, a message will also appear on various windows throughout OfficeMate reminding you that you must check the patient's ID.

► **To view and print correspondence history**

- 1 Click the **Correspondence Hx** tab in the Patient Demographic window.
- 2 Select the correspondence history type that you want to view from the **Correspondence Type** drop-down menu.
- 3 Type or select a date range in the **From Date** and **To Date** text boxes.

4 Click **Display**.

Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00

Demographic | Insurance | Marketing | Notes | Recall | Financial Info | **Correspondence Hx** | HIPAAMate | eDocuments

Correspondence Type: All From Date: 08/01/2003 To Date: 08/01/2008

Print Date	Document Type	Document Printed
09/15/2007	HCFA Printing	Printed HCFAs For Medical Eye Services
09/15/2007	HCFA Printing	Printed HCFAs For Medical Eye Services
01/26/2006	Monthly Statement	Monthly Statement

Total Correspondence: 3

Display Print

Patient # 8

HIPAA

OK Cancel New F2 Find Letters Ledger Label Glance ExamWRITER Find Appts Charges 1 Encounters

The correspondence history appears in the **Correspondence History** box.

5 Click **Print** to print the patient's correspondence history.

► To record HIPAAMate Information

Record HIPAAMate information to help your office comply with HIPAA regulations.

- 1 Click the **HIPAAMate** tab in the Patient Demographic window.
- 2 Select the **Read and Understand Notice** check box if the patient has read and understood your office's privacy practices.

The color-coded HIPAA box on the right side of the Patient Demographic window changes from red to green. The Date Recorded appears and if security is active, the Recorded By user also appears.

- 3 Select the **Modified Form on File** check box if you updated a paper HIPAA file for the patient.

- 4 To record patient privacy, consent, and authorization forms, follow the instructions below:

Notes

- To modify existing patient privacy, consent, or authorization forms, double-click the form, type your **User ID** and **Password** in the Access Secured Function window, and click **OK**. You must be a HIPAA Privacy Officer to modify forms. For more information on setting up HIPAA Privacy Officers in OfficeMate, see [To modify or add provider & staff names on page 50](#).
- To view a Patient Privacy, Consent, or Authorization form, select the form and click **View**.
- To delete patient privacy, consent, or authorization forms, select the form, click **Delete**, type your **User ID** and **Password** in the Access Secured Function window, and click **OK**. You must be a HIPAA Privacy Officer to delete forms. For more information on setting up HIPAA Privacy Officers in OfficeMate, see [To modify or add provider & staff names on page 50](#).
- To print a list of the patient's privacy, consent, and authorization forms, click **Print List**.

- Click **Add** in the Patient Privacy, Consent and Authorization Forms box to open the **HIPAA Form Information** window opens.
- Select a form from the **Form Type** menu.
- Type or select an expiration date in the **Expires on Date** text box.

- If you want to add notes to the form, type them in the **Notes** text box.
- Click **Browse** to navigate to and select an electronic document to link to the patient's privacy, consent, and authorization forms.

OR

Click **Scan** to scan documents directly into OfficeMate and save them as an eDocument in the patient's HIPAAMate record. For more information on scanning documents into OfficeMate, go to step 6 in [Attaching Electronic Documents to Patient Records on page 101](#).

For more information on scanning documents into OfficeMate, see the “OSSU 504 Scanning Documents” iTrain.

- f. Click **OK** to close the HIPAA Form Information window.

Note

The **Entered By** cell is populated only if your OfficeMate security is active.

- 5 To record patient PHI disclosures, follow the instructions below:

Notes

- To modify existing patient PHI disclosures, double-click the form.
- To delete patient PHI disclosures, select the form and then click **Delete**.
- To view a Patient PHI Disclosure, select the form and click **View**.
- To print a list of the patient's PHI disclosures, click **Print List**.

- Click **Add** in the Patient PHI Disclosures box to open the **Patient PHI Disclosure** window opens.
- Type a reason for the disclosure in the **Reason** text box.
- Type the name of the recipient in the **Recipient** text box.

- Type information on the disclosed PHI in the **PHI Disclosed** text box.

- e. Click **Browse** to navigate to and select an electronic document to link to the patient's PHI disclosure.
- f. Click **OK** to close the Patient PHI Disclosure window.

Note

The **Entered By** cell is populated only if your OfficeMate security is active.

- 6 Click **New Notes** to type new notes in the Patient Privacy and Security Notes box or place your cursor in a previous note to edit it.

Note

To print the Patient Privacy and Security Notes, click **Print Notes**.

► **To select letters to send to a patient**

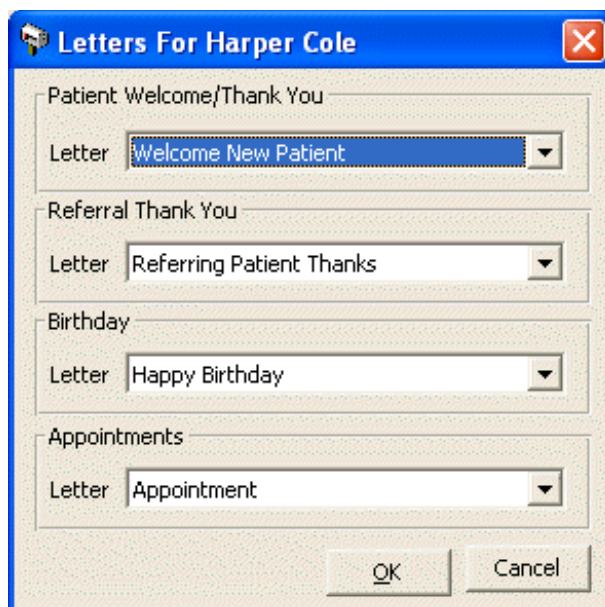
Follow the instructions below to select welcome, thank you, birthday, and appointment letters to send to a patient.

Note

Before you select letters to send to a patient, ensure that you have set up your patient letter preferences. To set up your preferences, see [To define and change patient preferences on page 68](#).

- 1 Click **Letters** on the Patient Demographic window.
The **Letters** window opens.

- 2 Select letters from the Patient Welcome/Thank You, Referral Thank You, Birthday, and Appointments Letter drop-down menus.



- 3 Click **OK**.

Attaching Electronic Documents to Patient Records

Follow the instructions below to store and organize links to electronic documents in OfficeMate. If you are scanning documents and saving them on your computer so that you can link them to patients' OfficeMate records, select a standard naming convention (i.e., patient name or number) to use when naming the documents and save the documents in your OMATE32\DATA\eDocuments folder.

- 1 Click the **eDocuments** tab in the Patient Demographic window.

Notes

- To view an electronic document, select the document and click **View**.
- To delete an electronic document, select it and then click **Delete**.
- To print a list of the patient's electronic documents, click **Print List**.

- 2 Click **Add** to add a new document or double-click an existing document to edit it.

The **EDocuments Information** window opens.

- 3 Select a form from the **Form Type** menu.

Note

Press the **F12** key to open a **Maintain** window and add new items to the Form Type menu.

- 4 Type or select an expiration date in the **Expires on Date** text box.
- 5 If you want to add notes to the form, type them in the **Notes** text box.

- 6 Click **Browse** to navigate to and select an electronic document to link to the patient's record.

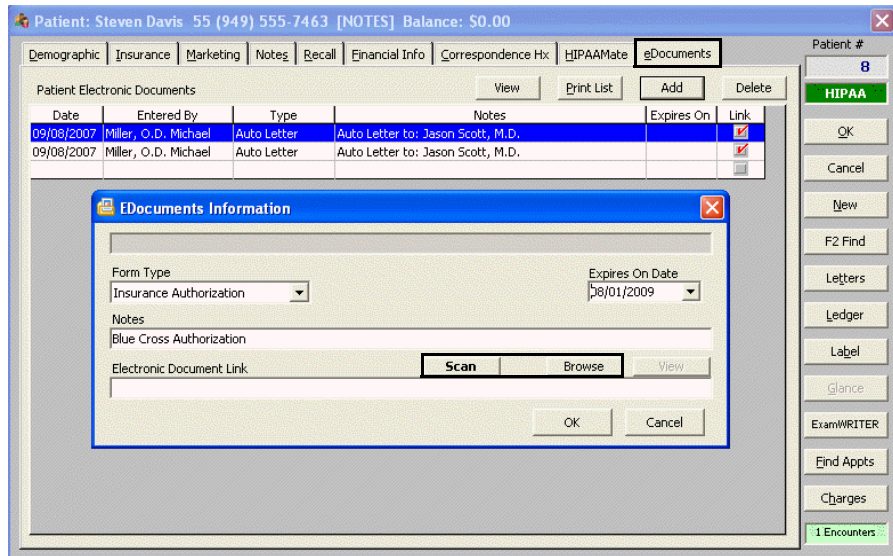
OR

Click **Scan** to scan documents directly into OfficeMate and save them as an eDocument in the patient's record.

For more information on scanning documents into OfficeMate, see the "OSSU 504 Scanning Documents" iTrain.

Notes

- Because all documents scanned directly into OfficeMate must be saved as PDF files, you must have Adobe Reader installed on your computer. Go to www.adobe.com to download and install Adobe Reader for free.
- OfficeMate Software Solutions does not recommend a specific scanner brand or model; you can use any scanner that can create an electronic document with the OfficeMate eDocuments feature. For more information on scanners, go to <http://www.officemate.net/omkb/article.aspx?id=10958>, or consult your hardware technician.
- OfficeMate Software Solutions does not support your hardware and highly suggests consulting your hardware technician before purchasing a scanner to use with your computer. For installation, support, and troubleshooting issues related to your scanner, contact the scanner's manufacturer.



- 7 If you clicked Scan in step 6, follow the instructions below; otherwise, skip to step 8:
 - a. Select the following Scan Options on the Scan Document(s) window:

B/W if you want to scan the document in black and white.

Greyscale if you want to scan the document in greyscale.

Color if you want to scan the document in color.

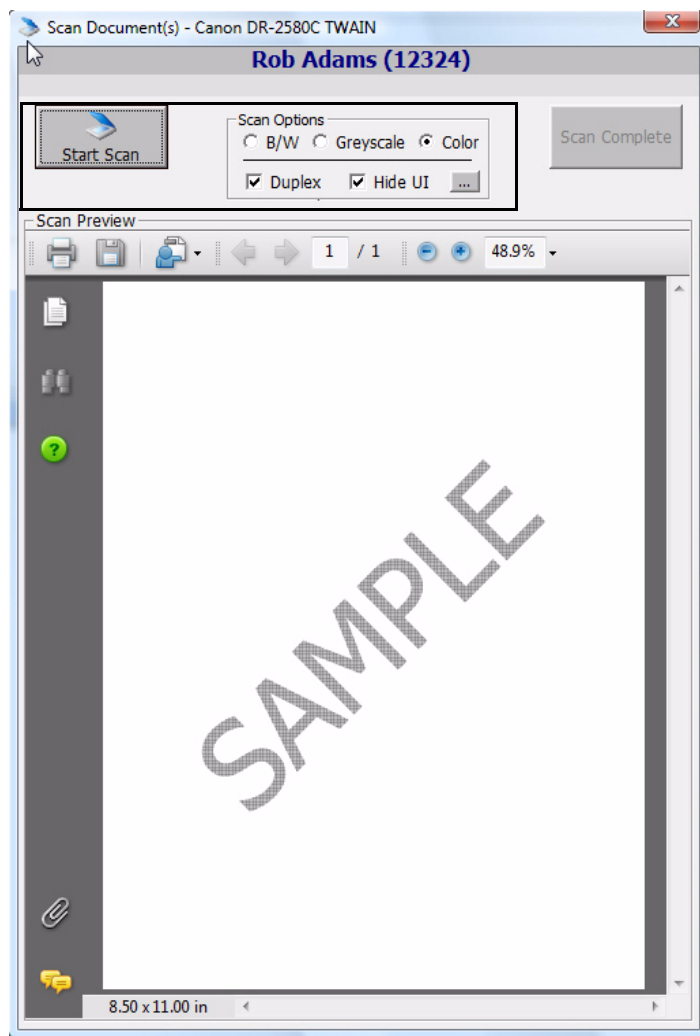
Duplex if you want to scan two sides of a document (and if it is supported by the scanner).

Hide UI if you want to hide the scanner's user interface. If you deselect this check box then the scanner's interface will open with additional scanning options. For information about these additional options, view the scanner's documentation.
 - b. Click the ... (ellipse) button in the Scan Options box to open the Select Source window and select a scanner.

Note

If you select a different scanner from the one that is already displayed on the blue title bar in the Scan Document(s) window, the window will close and you will have to reopen it by clicking Scan on the EDocuments Information window.

- c. Click **Start Scan** to scan the document.



- d. Click **Scan Complete** after the document is finished scanning.

Note

Do *not* click the Save icon in the Scan Preview section of the Scan Document(s) window to save the document. You *must* click the Scan Complete button to properly save the document.

OfficeMate automatically names the document using the current date and saves it as a PDF file in the OMATE32\DATA\eDocuments folder.

- 8 Click **OK**.

Note

The **Entered By** text box is populated only if your OfficeMate security is active.

Printing Patient Labels

Follow the instructions below to print individual mailing labels and file folder labels for patients in OfficeMate.

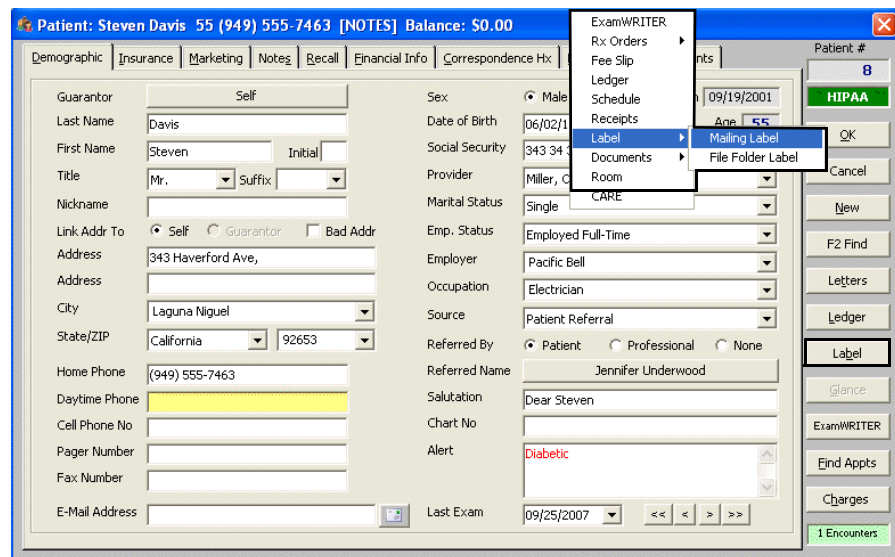
Notes

- Before you print mailing labels and file folder labels, ensure that you have set up your printer and defined your label preferences. To set up your printer, see [Setting Up the Printer on page 31](#). To define your label preferences, see [To define and change label printer preferences on page 70](#).
- To review the OfficeMate printer specifications, see [Hardware Specifications on page 25](#).
- Print labels using Avery 5261 compatible white mailing labels or Dymo LabelWriter 400 address labels (SKU 30252). You can purchase the Avery 5261 from Avery at www.avery.com. You can purchase the Dymo LabelWriter 400 labels from Dymo at www.dymo.com.

- 1 Click **Label** on the Patient Demographic window to open the Print Labels window and go to step 2.

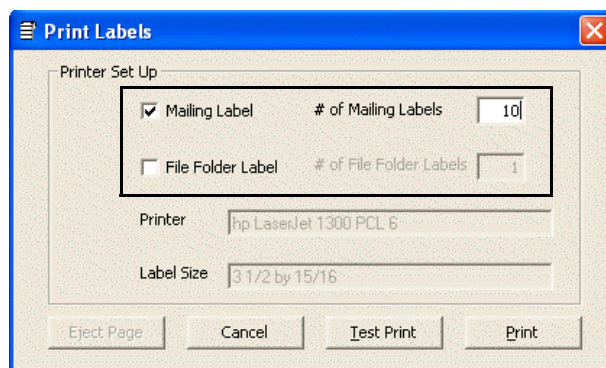
OR

Right-click on the Patient Demographic, Eyewear Order, Soft Lens Order, Hard Lens Order, Fee Slip, Patient Ledger, or Receipts & Adjustments window title bar or on a patient in the OfficeMate Information Center window, select **Label**, and then select **Mailing Label** or **File Folder Label** to automatically print a mailing or file folder label.



- 2 Select the **Mailing Label** and/or **File Folder Label** check box.

- 3 Type the number of labels that you want to print in the **# of Mailing Labels** and/or **# of File Folder Labels** text box.



- 4 Click one of the following buttons:
- **Test Print** to print a sample label.
 - **Print** to print all of the labels that you selected.

Note

File folders labels will print the information that you set up in your OfficeMate preferences only if that information is available in the patient record.

Viewing All Patient Information

Follow the instructions below to view, print, and export all of the information in a patient's record.

- 1 Click **Glance** on the Patient Demographic window.

Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00

Demographic | Insurance | Marketing | Notes | Recall | Financial Info | Correspondence Hx | HIPAA Mate | eDocuments

Guarantor: Self Sex: Male Added On: 09/19/2001

Last Name: Davis Date of Birth: 06/02/1953 Age: 55

First Name: Steven Initial: Social Security: 343 34 3579 Active: ☒

Title: Mr. Suffix: Provider: Miller, O.D., Michael

Nickname: Marital Status: Single

Link Addr To: Self Guarantor: Bad Addr: Emp. Status: Employed Full-Time

Address: 343 Haverford Ave, Employer: Pacific Bell

Address: City: Laguna Niguel Occupation: Electrician

State/ZIP: California 92653 Source: Patient Referral

Home Phone: (949) 555-7463 Referred By: Patient Professional: None

Daytime Phone: Referred Name: Jennifer Underwood

Cell Phone No: Salutation: Dear Steven

Pager Number: Chart No:

Fax Number: Alert: Diabetic

E-Mail Address: Last Exam: 09/25/2007

Patient #: 8

HIPAA

OK

Cancel

New

F2 Find

Letters

Ledger

Label

Glance

ExamWRITER

Find Appts

Charges

1 Encounters

The **OfficeMate Patient Data Sheet** opens and displays print and export buttons.

OfficeMate Patient Data Sheet

1 of 1 100% Total: 14 100% 14 of 14

Patient Data Sheet for Davis, Steven

Provider: Miller, O.D., Michael

Date: 12/02/2004

Time: 2:48 pm

Chart No:

HIPAA - Read & Understood Yes HIPAA - Modified Form on File No

Personal Information

Davis, Steven

343 Haverford Ave,

Laguna Niguel, California 92653

Nickname:

Title: Mr.

Gender: Male

Birthdate: 06/02/1953

Age: 51

Home Phone: (949) 555-7463

Salutation: Dear Steven

Social Security Number: 343 34 3579

Daytime Phone:

No. of Referrals: 0

Ref. Sales:

Guarantor: Self

- 2 To print the data sheet, follow the instructions below:
 - a. Click the printer button to open the Print window.
 - b. Select the Print Range, number of Copies, and whether or not you want to Collate Copies.
 - c. Click **OK**.

Print

Printer: System Printer (hp LaserJet 1300 PCL 6)

OK

Cancel

Print Range

☒ All

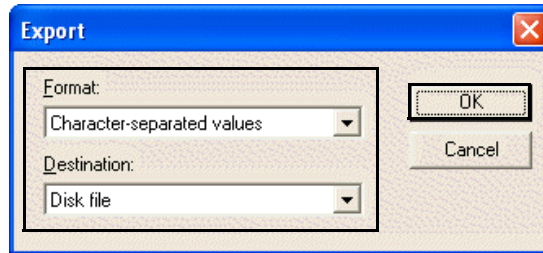
☐ Pages

From: 1 To:

Copies: 1

☒ Collate Copies

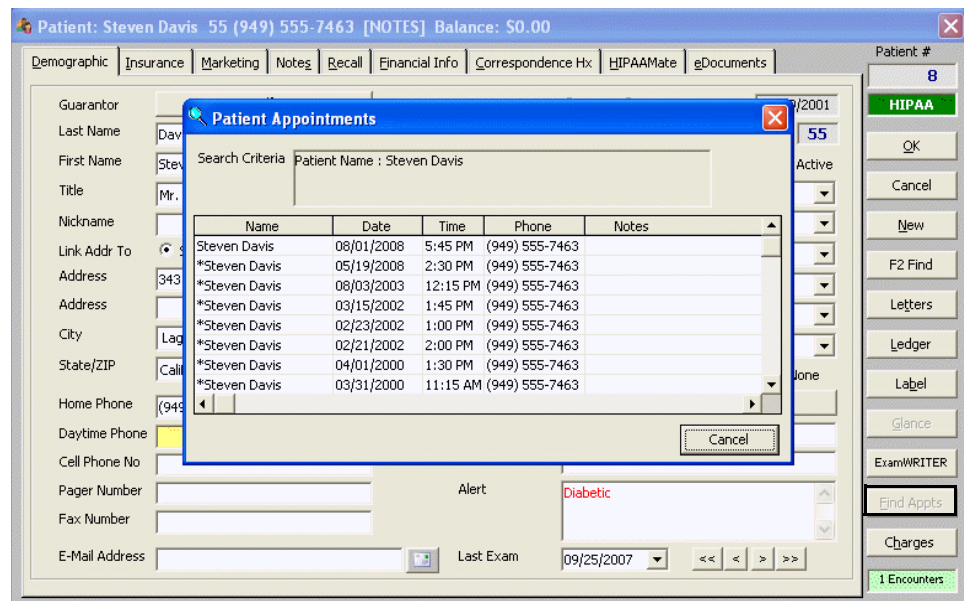
- 3 To export the data sheet, follow the instructions below:
 - a. Click the export button to open the Export window.
 - b. Choose an export format and destination from the **Format** and **Destination** drop-down menu.
 - c. Click **OK**.



- d. Specify the values requested or choose an export file to export the data sheet.

Viewing Patient Appointments

To view a list of a patient's appointments, click **Find Appts**. The **Patient Appointments** window opens.



Printing One-Click Patient Documents

Follow the instructions below to quickly print patient documents from the Patient Demographic, Eyewear Order, Soft Lens Order, Hard Lens Order, Fee Slip, Patient Ledger, and Receipts & Adjustments windows.

Note	Before you print patient documents, ensure that you have set up your default printer and defined your one-click document preferences. To set up your printer and define your preferences, see To define and change one-click document preferences on page 70 .
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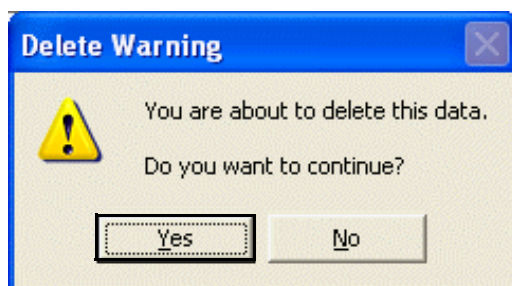
- 1 Right-click on the Patient Demographic, Eyewear Order, Soft Lens Order, Hard Lens Order, Fee Slip, Patient Ledger, or Receipts & Adjustments window title bar or on a patient in the OfficeMate Information Center window and select **Documents**.
- 2 Select one of the documents that is displayed to automatically print it on 8½" x 11" paper stock.

Deleting Patient Records

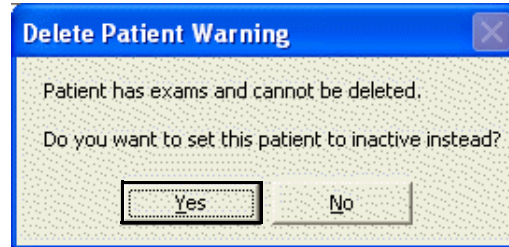
Follow the instructions below to delete a patient record from OfficeMate.

Notes	<ul style="list-style-type: none"> • You cannot delete a patient's record if the patient has an open balance or an insurance balance, scheduled future appointment, an existing exam record in ExamWRITER, is a guarantor for another patient, or is the insured party for another patient. • If you do not want to delete the patient record, you can mark the record inactive by deselecting the Active check box in the Patient Demographic window. Deselecting this check box indicates that service to this patient has been discontinued.
--------------	--

- 1 Open a patient record. For more information on opening a patient record, see [Opening Patient Records on page 81](#).
- 2 Click **Tasks** on the OfficeMate main window toolbar.
- 3 Select **Delete Patient**.
The **Delete Warning** window opens.
- 4 Click **Yes** to delete the patient record from OfficeMate.



- 5 If the patient has exams recorded in ExamWRITER, the **Delete Patient Warning** window opens because the patient record cannot be deleted. Select **Yes** to set the patient record as inactive.



Viewing & Deleting Patient Open Charges

If a patient has open prescription charges in his or her record, follow the instructions below view and delete them. To post open charges to fee slips, go to [Creating & Opening Fee Slips on page 190](#).

- 1 Open a patient record. For more information on opening a patient record, see [Opening Patient Records on page 81](#).
- 2 Click **Charges**.

 A screenshot of the "Patient: Steven Davis" window in the OfficeMate software. The window has a title bar with the patient's name and ID, and a balance of \$0.00. Below the title bar are several tabs: Demographic, Insurance, Marketing, Notes, Recall, Financial Info, Correspondence Hx, HIPAAMate, and eDocuments. The "Demographic" tab is selected. The form contains various fields for patient information, including Guarantor (Self), Last Name (Davis), First Name (Steven), Title (Mr.), Nickname, Link Addr To (Self), Address (343 Haverford Ave), City (Laguna Niguel), State/ZIP (California/92653), Home Phone ((949) 555-7463), Daytime Phone, Cell Phone No, Pager Number, Fax Number, E-Mail Address, Sex (Male), Date of Birth (06/02/1953), Age (55), Social Security (343 34 3579), Provider (Miller, O.D., Michael), Marital Status (Single), Emp. Status (Employed Full-Time), Employer (Pacific Bell), Occupation (Electrician), Source (Patient Referral), Referred By (Patient), Referred Name (Jennifer Underwood), Salutation (Dear Steven), Chart No, Alert (Diabetic), and Last Exam (09/25/2007). On the right side of the window, there is a vertical toolbar with buttons for Patient # (8), HIPAA, OK, Cancel, New, F2 Find, Letters, Ledger, Label, Glance, ExamWRITER, Find Appts, Charges, and 1 Encounters. The "Charges" button is highlighted.

The **Patient Open Charges** window opens.

- 3 If you are an ExamWRITER user and you record an exam with a lab order and schedule an examination, the scheduled orders are displayed in the Patient Open Charges window in OfficeMate. Select the provider or staff member who you want to schedule the orders, select the orders to schedule, and click **Post to Task List** to post the scheduling orders task to the Task Manager. For more information about using the Task Manager, go to [Using the Task Manager on page 473](#).

- 4 Click **Close out** to delete the patient open charges.

The screenshot shows the 'Patient Open Charges' window. It contains a table of open charges with columns for Date, Description, Order #, Unit Price, Qty, Total, CPT, ICD-9, and Insurance. Below the table are buttons for Post, Close out, and Exit. The 'Close out' button is highlighted with a red box. Below the table is a section for 'Orders to be Scheduled' with a dropdown menu for 'Send to:' and a table of scheduled orders with columns for Description and Type. A 'Post to Task List' button is also present.

	Date	Description	Order #	Unit Price	Qty	Total	CPT	ICD-9	Insurance
<input checked="" type="checkbox"/>	04/30/2009	Executive	5	0.00	1	0.00	0		
<input checked="" type="checkbox"/>	04/30/2009	Executive	5	0.00	1	0.00	0		
<input checked="" type="checkbox"/>	04/30/2009	AR Coating	5	0.00	1	0.00	0		
<input checked="" type="checkbox"/>	04/30/2009	Lens Add On	5	0.00	1	0.00	0		

Post Close out Exit

Orders to be Scheduled

Send to: Carrie, Daniels Marie

	Description	Type
<input checked="" type="checkbox"/>	Schedule on or about 04/30/2010: Examination: Contact Lens Examination	Examination
<input checked="" type="checkbox"/>	Schedule on or about 04/30/2010: Examination: OS: Contact Lens Dispensing	Examination

Post to Task List

CHAPTER 3

Maintaining Product & Service Information

In this chapter:

For more information on maintaining products & services, see the “OSSU 105 Setting Up Products & Services” iTrain and the OSSU 100-1, “Setting Up Products & Services and Customizing OfficeMate,” training course.

- [Setting Up Product & Service Information, 113](#)
- [Opening the Products Window, 118](#)
- [Finding Products & Services, 119](#)
- [Recording Product Information, 121](#)
- [Recording Service Information, 131](#)

Maintaining product and service information in OfficeMate allows you to generate sales and production reports; automatically transfer price, product, and insurance information into fee slips; generate accurate information on eyewear and contact lens Rx order forms; and provide services to use in the Appointment Scheduler. You can set up and record as little or as much product and service information in OfficeMate as is necessary for your practice.

Setting Up Product & Service Information

You can set up as little or as much product and service information in OfficeMate as is necessary for your practice. This section tells you how to set up product and service information in OfficeMate, including how

- [To set up product types, 114](#)
- [To set up barcode label options, 115](#)
- [To set up general ledger numbers, 116](#)
- [To set up mass changes, 116](#)
- [To set up commission classes, 117](#)

Note

Press the **F12** key when your cursor is in a drop-down box to open a **Maintain** window and add new items to the drop-down menu selections. For more information on using the F12 key, go to [To add and maintain list box selections \(F12\) on page 19](#).

► To set up product types

Products or services that share similar characteristics are grouped by product type. When you add a new product or service to OfficeMate in the Products window, the product type defaults set up using the instructions below apply to the new item.

- 1 Click **Setup** on the OfficeMate main window and select **Product Setup**.
The **Product Setup** window opens.
- 2 Select one of the nine product types from the **Product type** drop-down menu.
- 3 Deselect the **Maintain perpetual** check box if you do *not* want to maintain inventory for this product type.

- 4 Select tax types from the **Tax 1 type** and **Tax 2 type** drop-down menus, if applicable.

Note Press the **F12** key on your keyboard while your cursor is in the Tax 1 Type and Tax 2 Type drop-down menus to open a Maintain window and record the tax percentage amounts.

- 5 If you want to exclude discounts on services, deselect the **Apply Discount On Services** check box.

Note You can still apply discounts to line items on fee slips if the **Apply Discount On Services** check box is deselected by clicking **Line Add'l Data** on the Fee Slip window. For more information about adding data to fee slips, go to [Recording Information on Fee Slips on page 193](#).

- 6 Select the **Gross%**, **Margin%**, or **Set Amount** Commission method radio button.

- 7 Type the commission rate in the **Commission rate** text box.

Note

If you have set up a commission for a specific provider, it will take precedence over a commission set up for a product type.

- 8 Type a special incentive amount for the product type in the **Special incentive -Spiff** text box.
- 9 Click **Print** to print the product type information.
- 10 Click **OK** to close the Product Setup window.

► To set up barcode label options

Note

The SATO CX208 and CX400 barcode printers are the only barcode printers that are compatible with OfficeMate. To purchase a SATO barcode printer, contact OfficeMate Sales at 1.800.269.3666.

- 1 Click **Setup** on the OfficeMate main window and select **Product Setup**. The **Product Setup** window opens.
- 2 Click the **Preferences** tab.
- 3 Select up to four lines of information to print on barcode labels from the **Barcode Label Options** list.
- 4 Select the **UPC** or **Product Code** radio button to print a UPC or product code column on barcode labels.
- 5 Select your barcode printer from the **Bar Code Printer** drop-down menu.
- 6 Type the communication port to which your barcode printer is connected in the **Comm. Port for Barcode Printer** text box.

For more information on using your SATO barcode printer, see the "Scanning and Printing Barcodes With OfficeMate" document.

Product Setup

Product Type | **Preferences** | GL Numbers | Mass Change | Commission Class

These Preferences apply to ALL Product Types.

Start date of first periods: 01/01/2000

Current calendar year: 2004

Current inventory period: 3

of periods in a year: 12

Will physical count be stored by board location? ☐ Yes ☒ No

Barcode Label Options

Description (1 Line, 1st 24 chrs.) ☒ Yes ☐ No

Description (split on two lines) ☐ Yes ☒ No

Manufacturer ☒ Yes ☐ No

Designer Series ☒ Yes ☐ No

Color Description ☐ Yes ☒ No

Board Location ☐ Yes ☒ No

Date Received ☐ Yes ☒ No

Fee ☒ Yes ☐ No

You may select 4 lines of data for barcode.

Column on bar code ☐ UPC ☒ Product Code

Bar Code Printer: Sato CX208

Comm. Port for Barcode Printer: 0

OK New Delete Print Cancel

- 7 Click **OK** to close the Product Setup window.

► To set up general ledger numbers

General ledger numbers are already set up in OfficeMate for you to use with your inventory. If you have a general ledger system with different names or numbers, follow the instructions below to modify the existing OfficeMate numbers and descriptions.

- 1 Click **Setup** on the OfficeMate main window and select **Product Setup**.
The **Product Setup** window opens.
- 2 Click the **GL Numbers** tab.
- 3 Click in an **Account number** or **Description** text box to modify account numbers or descriptions.
- 4 Select a product type from the **Product type** drop-down menu.
- 5 Select general ledger accounts from the **General ledger accounts** drop-down menus.

The screenshot shows the 'Product Setup' window with the 'GL Numbers' tab selected. The window has a title bar with a close button. Below the title bar are five tabs: 'Product Type', 'Preferences', 'GL Numbers' (selected), 'Mass Change', and 'Commission Class'. The main area contains a table with two columns: 'Account number' and 'Description'. The table lists the following accounts: Inventory, Cost of Goods Sold, Sales, Returns, Adjustment, and Purchase Clearing. To the right of the table is a section titled 'Product type' with a drop-down menu currently set to 'Accessories'. Below this is a section titled 'General ledger accounts' with six drop-down menus, each corresponding to an account in the table: Inventory, COGS, Sales, Returns, Adjustment, and Purchase. At the bottom of the window are five buttons: 'OK', 'New', 'Delete', 'Print', and 'Cancel'.

Account number	Description
Inventory	Inventory
Cost of Goods Sold	Cost of Goods Sold
Sales	Sales
Returns	Returns
Adjustment	Adjustment
Purchase Clearing	Purchase Clearing

Product type
Accessories

General ledger accounts

Inventory: Inventory
COGS: Cost of Goods Sold
Sales: Sales
Returns: Returns
Adjustment: Adjustment
Purchase: Purchase Clearing

OK New Delete Print Cancel

- 6 Click **Print** to print the general ledger account numbers and descriptions.
- 7 Click **OK** to save your changes and close the Product Setup window.

► To set up mass changes

Set up mass changes to simplify changes in your costs and fees.

- 1 Click **Setup** on the OfficeMate main window and select **Product Setup**.
The **Product Setup** window opens.
- 2 Click the **Mass Change** tab.
- 3 Select a product type from the **Product type** drop-down menu.
- 4 Select a manufacturer from the **Manufacturer** drop-down menu.
- 5 Select a designer series, if applicable, from the **Designer Series** drop-down menu.

- 6 Select the **Cost** or **Fee** Data to change radio button.

- 7 Type either the percent or amount by which you want to change the cost or fee in the **Percent change** or **Amount change** text box.
- 8 Select the **Up** or **Down** Round radio button to round amounts up or down.
- 9 Type the amount that you want the cost or fee to end with in the **End amount with** text box.
- 10 Click **Process Changes**.
- 11 Click **OK** to close the Product Setup window.

► To set up commission classes

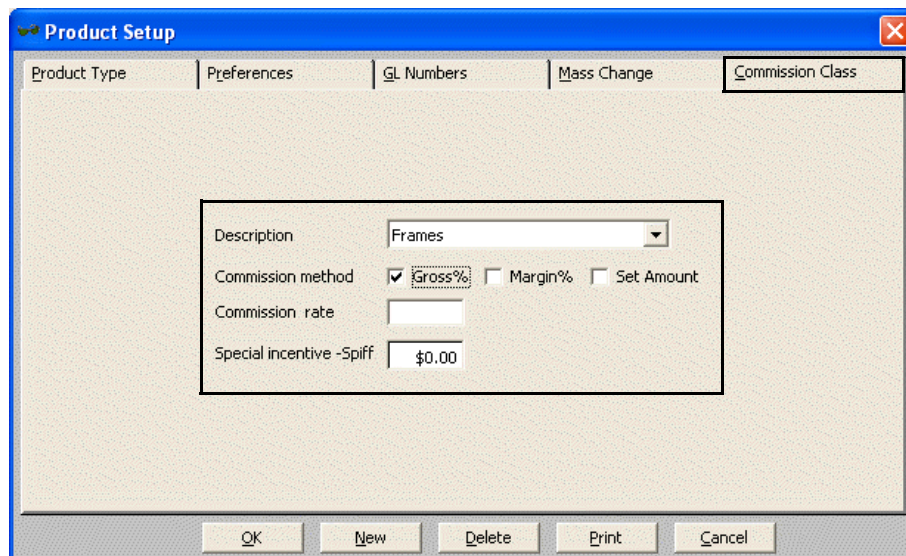
Set up commission classes for products for which you use the same commission method and rate.

- 1 Click **Setup** on the OfficeMate main window and select **Product Setup**.
The **Product Setup** window opens.
- 2 Click the **Commission Class** tab.
- 3 Select a commission class from the **Description** drop-down menu.
OR
Click **New** to set up a new commission class.

- 4 If you are setting up a new commission class, type the name of the commission class in the **New Commission Class** window and click **OK**; otherwise, skip to step 6.



- 5 Select the **Gross%**, **Margin%**, or **Set Amount** Commission method check box.
- 6 Type the percent or dollar amount in the **Commission rate** text box.



- 7 Type the special incentive dollar amount, if applicable, in the **Special incentive-Spiff** text box.
- 8 Click **Print** to print the commission class.

Note Click **Delete** to delete a commission class.

- 9 Click **OK** to close the Product Setup window.

Opening the Products Window

Open the Products window using one of the following methods:

- Click the **Products** icon and select **Products and Services**.
- Click **Tasks** on the main window toolbar and select **Products and Services**.

Finding Products & Services

- 1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).

The **Products** window opens.

Note

To conduct an advanced search for a product, click **Advanced Search** to open the Find Product window and search for a product using additional criteria.

Product Name/Code	Print Name	Color	Eye	DBL	Templ	Bridg	BC	Dia	Sphere	Cyl	Axis	Add	On Hand	UPC
Acuvue [73390510035] Multipack Acuvue							8.80	14.00	-4.50	0.00	0	0.00	0	
Acuvue [73390510037] Multipack Acuvue							8.80	14.00	-4.75	0.00	0	0.00	0	
Acuvue [73390510039] Multipack Acuvue							8.80	14.00	-5.00	0.00	0	0.00	0	
Acuvue [73390510041] Multipack Acuvue							8.80	14.00	-5.25	0.00	0	0.00	0	
Acuvue [73390510043] Multipack Acuvue							8.80	14.00	-5.50	0.00	0	0.00	-4	
Acuvue [73390510045] Multipack Acuvue							8.80	14.00	-5.75	0.00	0	0.00	0	
Acuvue [73390510047] Multipack Acuvue							8.80	14.00	-6.00	0.00	0	0.00	-4	
Acuvue [73390510051] Multipack Acuvue							8.80	14.00	-6.50	0.00	0	0.00	0	
Acuvue [73390510055] Multipack Acuvue							8.80	14.00	-7.00	0.00	0	0.00	0	
Acuvue [73390510059] Multipack Acuvue							8.80	14.00	-7.50	0.00	0	0.00	0	
Acuvue [73390510063] Multipack Acuvue							8.80	14.00	-8.00	0.00	0	0.00	0	
Acuvue [73390510067] Multipack Acuvue							8.80	14.00	-8.50	0.00	0	0.00	0	

To add a new product or service through the Find Product window, click **New Product** and follow the instructions below:

- 1 Click **Add Product**.

The **Quick New Product Entry** window opens.

- 2 Type or select appropriate product options.
- 3 Click **OK**.

- 4 Add additional product or service information before recording this product or service on a fee slip or maintaining inventory for this product. For more information on adding additional product or service information, go to [Recording Product Information on page 121](#) or [Recording Service Information on page 131](#).

- 5 Select a product or service from the **Product Type** drop-down menu.

Notes

- Frame and lens add-ons are included in the Other and Lens Treatment product types.
- To add a new product or service, click **New Product** and go to [Recording Product Information on page 121](#) or [Recording Service Information on page 131](#).

- 6 Select a product manufacturer from the **Manufacturer** drop-down menu or select a service **CPT** code radio button.
- 7 Type a product or service name in the **Product Name** text box.
- 8 Select the **Include inactive products** check box if you want to maintain product or service information for inactive products or services.
- 9 Click **F2-Find** to search for a product or service.

The screenshot shows the 'Products' window with the following details:

- Product Type:** Contact Lenses
- Manufacturer:** Bausch & Lomb
- Product Name:** (empty text box)
- Include inactive products:** (unchecked checkbox)
- Buttons:** F2-Find, Advanced Search, Clear, New Product
- Table Headers:** Product ID #, Product Name, Print on Fee Slip, Stocking Type, Lens Category, Manufacturer, Tint, Material, UOM

- 10 Double-click on a product or service to view or modify information. For more information on recording or modifying product or service information, go to [Recording Product Information on page 121](#) or [Recording Service Information on page 131](#).

Note

You can drag and drop column headings to rearrange column views.

Products

Product Type: Manufacturer: F2-Find

Product Name: ☐ Include inactive products

65 products/services found.

Product Name	Print on Fee Slip	Prod Fee	Vendor	Manufacturer	Designer	Material	Mount	Frame Type	Frame Usage	Gender	Inactive	Q
AIRLOCK 760/2	AIRLOCK 760/2	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex		Rimless	Complete Spe	Regular Rx	Women's	<input type="checkbox"/>	
AIRLOCK 760/3	AIRLOCK 760/3	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Spe	Regular Rx	Unisex	<input type="checkbox"/>	
AIRLOCK 760/4	AIRLOCK 760/4	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Spe	Regular Rx	Women's	<input type="checkbox"/>	
AIRLOCK 760/5	AIRLOCK 760/5	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex		Rimless	Complete Spe	Regular Rx	Unisex	<input type="checkbox"/>	
AIRLOCK 760/6	AIRLOCK 760/6	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex		Rimless	Complete Spe	Regular Rx	Women's	<input type="checkbox"/>	
AIRLOCK 760/7	AIRLOCK 760/7	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Spe	Regular Rx		<input type="checkbox"/>	
AIRLOCK 760/8	AIRLOCK 760/8	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Spe	Regular Rx	Women's	<input type="checkbox"/>	
AIRLOCK 760/9	AIRLOCK 760/9	214.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Spe	Regular Rx	Women's	<input type="checkbox"/>	
AIRLOCK720/115	AIRLOCK720/115P	244.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Suni	Miscellaneous	Unisex	<input type="checkbox"/>	
AIRLOCK720/125	AIRLOCK720/125P	244.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Suni	Miscellaneous	Unisex	<input type="checkbox"/>	
AIRLOCK720/225	AIRLOCK720/225P	244.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Suni	Miscellaneous	Women's	<input type="checkbox"/>	
AIRLOCK720/235	AIRLOCK720/235P	244.99	Marchon Eyew	Marchon Eyew	Marchon® Collex			Complete Suni	Miscellaneous	Unisex	<input type="checkbox"/>	
AIRELON R AF EV	AIRELON R AF EV001.8	160.99	Marchon Eyew	Marchon Eyew	Nike		Metal	Complete Suni	Miscellaneous	Unisex	<input type="checkbox"/>	
ASHLAND FLASH	ASHLAND FLASH	299.99	Marchon Eyew	Marchon Eyew	Nike			Complete Suni	Miscellaneous	Unisex	<input type="checkbox"/>	
ASHLAND PC	ASHLAND PC	276.99	Marchon Eyew	Marchon Eyew	Nike			Complete Suni	Miscellaneous	Unisex	<input type="checkbox"/>	
ASHLAND POLAR	ASHLAND POLARIZED	945.99	Marchon Eyew	Marchon Eyew	Nike			Complete Suni	Miscellaneous	Unisex	<input type="checkbox"/>	
AMPED	AMPED	112.99	Marchon Eyew	Marchon Eyew	X Games			Complete Spe	Regular Rx	Unisex Ch	<input type="checkbox"/>	
AMPED CLIP-ON	AMPED CLIP-ON	76.99	Marchon Eyew	Marchon Eyew	X Games		Metal	Complete Suni	Miscellaneous	Unisex Ch	<input type="checkbox"/>	

Recording Product Information

You can record as little or as much product information in OfficeMate as is necessary for your practice. This section tells you how to record products in OfficeMate, including how

- [To add or modify products, 122](#)
- [To add additional information to products, 125](#)
- [To itemize product details, 128](#)
- [To record ophthalmic lens optional fees, 130](#)

Notes

- If you are using the FRAMES SPEX UPC, FRAMES Quarterly CD-ROM, or Marchon Frames Diskette, go to [Using FrameMate on page 313](#) for instructions on how to use FrameMate to transfer frame information into OfficeMate.
- Before you add products to OfficeMate, set up your insurance fee schedule information and procedure codes. To set up insurance information, go to [To modify or add insurance information on page 58](#). To set up procedure codes, go to [To add procedure codes on page 45](#).
- Press the **F12** key when your cursor is in a drop-down box to open a **Maintain** window and add new items to the drop-down menu selections. For more information on using the F12 key, go to [To add and maintain list box selections \(F12\) on page 19](#).

► **To add or modify products****Note**

All of the fields in the steps in this section are not applicable for all products. Record applicable information for your product type. You can record as little or as much product information in OfficeMate as is necessary for your practice.

- 1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).
- 2 Select a product or service from the **Product Type** drop-down menu.

Note

Frame and lens add-ons are included in the Other and Lens Treatment product types.

- 3 Complete one of the following tasks:
 - Click **New Product** to add a new product.
 - Enter additional search criteria and click **F2 - Find** to search for and find an existing product. For more information on finding products, go to [Finding Products & Services on page 119](#).

Notes

- Click **Delete** to delete a product if it is *not* linked to a fee slip, Rx order, or purchase order.
- Click **Next** and **Previous** to add or modify the previous or next product in your database.

- 4 Click **Copy** to copy the product details and then make changes to them to record a new product.

OR

Type the product name in the **Product Name** text box.

Note

Name the product a short name (for ease and simplicity) or a number or CPT code with more than one digit.

- 5 Select a description to print on fee slips from the **Print on Fee Slip** drop-down menu.
- 6 Select a stocking type from the **Stocking Type** drop-down menu.
- 7 Select a lens category from the **Lens Category** drop-down menu, if applicable.

Note

You must assign contact lenses to a lens category in order for them to appear in the Select Contact Lens window in ExamWRITER.

The screenshot shows the 'Products : Contact Lenses - Acuvue' window. The 'Product Details' tab is active. The 'Product Name' field contains 'Acuvue'. The 'Print on Fee Slip' dropdown is set to 'Multipack Acuvue Lenses'. The 'Stocking Type' dropdown is set to 'Stock'. The 'Lens Category' dropdown is set to 'Hard MF'. The 'Manufacturer' field is empty. The 'Vendor' field is empty. The 'Lenses per Pack' field contains '0'. The 'Product Cost' field contains '\$0.00'. The 'Product Fee' field contains '\$0.00'. The 'Cost Changed' field contains '05/04/2006'. The 'Fee Changed' field contains '05/04/2006'. The 'New Since' field contains '11/25/1996'. The 'Inactive' checkbox is unchecked. The 'Quick List' checkbox is checked. There are also sections for 'Additional Fees', 'HCFA - 1500 Additional Information', and 'Commission'.

- 8 Select an item type from the **Item Type** drop-down menu, if applicable.
- 9 Select a manufacturer from the **Manufacturer** drop-down menu.
- 10 Select an appropriate **Frame and Lens Add On Type** radio button, if applicable.
- 11 Select a gender from the **Gender** drop-down menu, if applicable.
- 12 Select a designer series from the **Designer Series** drop-down menu, if applicable.
- 13 Select a material from the **Material** drop-down menu, if applicable.
- 14 Select a mount from the **Mount** drop-down menu, if applicable.
- 15 Select a tint from the **Tint** drop-down menu, if applicable.
- 16 Type or select the blank size from the **Blank Size** drop-down menu, if applicable.
- 17 Select the finish from the **Finish** drop-down menu, if applicable.

- 18 Select tax types from the **Tax Type1** and **Tax Type2** drop-down menus.

Note

To add a new tax type and tax percent to your drop-down menu options, place your cursor in the Tax Type1 or Tax Type2 box and then press the **F12** key on your keyboard to open the Maintain Product - Tax Type window. Type and record the tax percentage amounts.

- 19 Select an insurance fee type from the **Ins. Fee Type** drop-down menu.
- 20 Select the unit of measure from the **Unit of Measure** drop-down menu.
- 21 Select a vendor from the **Vendor** drop-down menu.
- 22 Select a frame type from the **Frame Type** drop-down menu, if applicable.
- 23 Select the frame usage from the **Frame Usage** drop-down menu, if applicable.
- 24 Select the number of lenses per pack of contacts from the **Lenses per Pack** drop-down menu, if applicable.
- 25 Type the product cost in the **Product Cost** text box.
- 26 Type the usual and customary product fee in the **Product Fee** text box.
- 27 Select the **Standard Temple** check box, if applicable.
- 28 Select the **Inactive** check box if the product or service is inactive.
- 29 Select the **Quick List** check box if you are *not* maintaining inventory for this product and you want to add it to your Product Quick List window.

The screenshot shows the 'Products : Contact Lenses - Acuvue' window. The 'Product Details' tab is active. The form contains the following fields and values:

- Product Name: Acuvue
- Tax Type1: Non taxable
- Tax Type2: (empty)
- Product Cost: \$15.99
- Product Fee: \$30.00
- Cost Changed: 09/18/1999
- Fee Changed: 09/18/1999
- New Since: 11/25/1996
- Inactive: ☐
- Quick List: ☒
- Print on Fee Slip: Multipack Acuvue Lenses
- Stocking Type: Stock
- Ins. Fee Type: Cosmetic Contact Lens
- Unit of Measure: Pack
- Manufacturer: Vistakon, Inc.
- Vendor: Vistakon, Inc.
- Lenses per Pack: 6
- Tint: Clear
- Material: Etafilcon A

Below the main form, there are sections for 'Additional Fees' (with a table for Patient Fee Type and Fee), 'HCFA - 1500 Additional Information' (with fields for CPT/HCPCS Code, Place of Service, EPST, COB, Local Use, Financial Group, and Production Group), and a 'Notes' section.

- 30 If you want to add more information to the product, go to [To add additional information to products on page 125](#), [To itemize product details on page 128](#), and [Recording Product Inventory Details on page 330](#); otherwise, click **Save** and select one of the following options:
- **Save** to save the information and keep the Products window open.
 - **Save and New** to save the information and create a new product.
 - **Save and Exit** to close the Products window.

► To add additional information to products

1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).

2 Select a product or service from the **Product Type** drop-down menu.

Note Frame and lens add-ons are included in the Other and Lens Treatment product types.

3 Complete one of the following tasks:

- Click **New Product** to add a new product. For more information on adding new products, go to [To add or modify products on page 122](#).
- Enter additional search criteria and click **F2 - Find** to search for and find an existing product. For more information on finding products, go to [Finding Products & Services on page 119](#).

Notes

- Click **Copy** to copy the product details and then make changes to them to record a new product.
- Click **Next** and **Previous** to add or modify the previous or next product in your database.

4 If you want to assign different patient fees for different types of patients, follow the instructions below; otherwise, go to step 5:

- a. Select a patient fee type from the **Patient Fee Type** drop-down menu.
- b. Type a fee in the **Fee** text box.

Note To delete an additional fee, select the line and click **Delete Line**.

5 Type the Medicare allowable fee in the **Medicare Allowable Fee** text box, if applicable.

- 6 Type the **FRAMES** cost or your buying group cost in the **Frames/Buying Group Cost** text box, if applicable.

Notes

- If you are using the **FRAMES SPEX UPC**, **FRAMES Quarterly CD-ROM**, or **Marchon Frames Diskette**, the cost is automatically transferred into the **Frames/Buying Group Cost** text box when you transfer frame information into OfficeMate.
- The **Frames/Buying Group Cost** overrides the product Fee on fee slips when you bill to VSP insurance.

- 7 Select a **CPT/HCPCS** code from the **CPT/HCPCS Code** drop-down menu, if applicable.

Notes

- The **CPT/HCPCS** code is automatically entered on the CMS 1500 form in box 24D.
- You can assign two CPT codes to ophthalmic lenses by recording a CPT code in the **CPT/HCPCS Code** text box in the **Products** tab and in the **Product Code** text box in the **Product Details** tab. If you assign two CPT codes to ophthalmic lenses, the codes recorded in the **Product Code** text box in the **Product Details** tab will override the codes in the **CPT/HCPCS Code** text box in the **Products** tab when you add the lenses to fee slips in OfficeMate. If you do not record a CPT code in the **Product Code** text box in the **Product Details** tab, the code in the **CPT/HCPCS Code** text box in the **Products** tab will appear on fee slips in OfficeMate.

- 8 Type Y in the **EPSDT** text box if the product is part of an early periodic screening and diagnostic test or N if the product is not part of an early periodic screening and diagnostic test.

Note

The **EPSDT** is automatically entered on the CMS 1500 form in box 24H.

- 9 Type Y in the **EMG** text box if the product is related to an emergency or type N in the **EMG** text box if the product is not related to an emergency.

Note

The **EMG** is automatically entered on the CMS 1500 form in box 24C.

- 10 Type Y in the **COB** text box if the product has a coordination of benefits.
- 11 Type the product's local use in the **Local Use** text box.
- 12 Select a financial group from the **Financial Group** drop-down menu if the CPT code and financial group are not already linked to each other. To modify CPT codes and their associated financial groups, go to [To add procedure codes on page 45](#).

- 13 Select a production group from the **Production Group** drop-down menu, if the CPT code and production group are not already linked to each other. To modify CPT codes and their associated production groups, go to [To add procedure codes on page 45](#).

The screenshot shows the 'Products : Contact Lenses - Acuvue' window. The 'Product Details' tab is active. The form contains the following fields and values:

- Product Name: Acuvue
- Print on Fee Slip: Multipack Acuvue Lenses
- Stocking Type: Stock
- Lens Category: Hard MF
- Manufacturer: Bausch & Lomb
- Tint: Aqua #1
- Material: Hema
- Tax Type1: Sales Tax
- Tax Type2: (empty)
- Ins. Fee Type: OvrPwer 4\70SPH SV
- Unit of Measure: Pack
- Vendor: Bausch & Lomb
- Lenses per Pack: 6
- Product Cost: \$50.00
- Product Fee: \$90.00
- Cost Changed: 05/08/2006
- Fee Changed: 05/08/2006
- New Since: 11/25/1996
- Inactive: ☐
- Quick List: ☒

Additional Fees table:

Patient Fee Type	Fee
Employee Fee	30.00
Relative Fee	10.00

HCFA - 1500 Additional Information:

- CPT/HCPCS Code: 92370 Contact Lens Therapy
- Place of Service: Office
- EPSTOT: Y EMG: Y
- COB: Y
- Local Use: (empty)
- Financial Group: Contact Lens Fees
- Production Group: Soft CL Revenues

Commission section:

- Class: (empty)
- Method: ☐ Gross% ☐ Margin% ☐ Set Amount
- Rate: (empty)
- Spiff Amount: \$0.00

Buttons on the right: Save, Cancel, Delete, New, Copy, Next, Previous.

- 14 Type notes in the **Notes** box.
- 15 If you want to add commission information, follow the instructions below; otherwise, go to step 16.
- Select a commission class from the **Class** drop-down menu.
 - Select the **Gross%**, **Margin%**, or **Set Amount** Method check box.
 - Type the commission percent or dollar amount in the **Rate** text box.
 - Type the special incentive dollar amount, if applicable, in the **Spiff Amount** text box.

Note

You do not need to add commission information for each product. To set up commission information for entire product types, go to [To set up commission classes on page 117](#).

- 16 If you want to itemize product details, go to [To itemize product details on page 128](#); otherwise, click **Save** and select one of the following options:
- **Save** to save the information and keep the Products window open.
 - **Save and New** to save the information and create a new product.
 - **Save and Exit** to close the Products window.

► To itemize product details

If you are *not* maintaining inventory and you want to itemize the size and color of frames or lenses with the same name, complete the instructions below. If you are maintaining inventory, go to [Recording Product Inventory Details on page 330](#) to add product details.

- 1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).

- 2 Select a product or service from the **Product Type** drop-down menu.

Note	Frame and lens add-ons are included in the Other and Lens Treatment product types.
-------------	--

- 3 Complete one of the following tasks:
 - Click **New Product** to add a new product. For more information on adding new products, go to [To add or modify products on page 122](#).
 - Enter additional search criteria and click **F2 - Find** to search for and find an existing product. For more information on finding products, go to [Finding Products & Services on page 119](#).

Notes	<ul style="list-style-type: none"> • Click Copy to copy the product details and then make changes to them to record a new product. • Click Next and Previous to add or modify the previous or next product in your database.
--------------	---

- 4 Click the **Product Details** tab.
- 5 Click **New** to add new product details or select in a line in the table to modify product details already recorded.

Note	Select a line and click Delete to delete the line if it is <i>not</i> linked to a fee slip, Rx order, or purchase order.
-------------	---

- 6 Type product sizes in the **BC, Dia, Sph, Cyl, Axis**, and **Add** text boxes.
- 7 Type or select a color from the **Color** drop-down menu, if applicable.
- 8 Type the product code in the **Product Code** text box.

Note	You can assign two CPT codes to ophthalmic lenses by recording a CPT code in the CPT/HCPCS Code text box in the Products tab and in the Product Code text box in the Product Details tab. If you assign two CPT codes to ophthalmic lenses, the codes recorded in the Product Code text box in the Product Details tab will override the codes in the CPT/HCPCS Code text box in the Products tab when you add the lenses to fee slips in OfficeMate. If you do not record a CPT code in the Product Code text box in the Product Details tab, the code in the CPT/HCPCS Code text box in the Products tab will appear on fee slips in OfficeMate.
-------------	--

- 9 Type the UPC code in the **UPC Code** text box.

The screenshot shows the 'Products : Contact Lenses - Acuvue' window. The 'Product Details' tab is active, displaying a list of products with columns: Discontinued, BC, Dia, Sph, Cyl, Axis, Add, Color, Product Code, UPC Code, Board Location, Stocking Level, and Minimum. The selected product is 789789, 65454, with a Board Location of 1 and a Stocking Level of 1. Below the list, the 'Print Bar Code' button is visible. The 'Product Sizes' section shows BC: 54.3, Dia: 6.00, Sph: +6.00, Cyl: +6.00, Axis: 6, Add: +6.00. The 'Color' is set to Brown. The 'Inventory' section shows Stocking level: 1, Min: 1, Qty on Hand: 0, On Order: 0, and Recorded By: Franklin, Helen.

Discontinued	BC	Dia	Sph	Cyl	Axis	Add	Color	Product Code	UPC Code	Board Location	Stocking Level	Minimum
<input type="checkbox"/>	8.80	14.00	-5.50					733905100437		4	2	
<input type="checkbox"/>	8.80	14.00	-5.75					733905100451		4	2	
<input type="checkbox"/>	8.80	14.00	-6.00					733905100475		6	2	
<input type="checkbox"/>	8.80	14.00	-6.50					733905100512		6	2	
<input type="checkbox"/>	8.80	14.00	-7.50					733905100598		6	2	
<input type="checkbox"/>	8.80	14.00	-8.00					733905100635		5	4	
<input type="checkbox"/>	8.80	14.00	-8.50					733905100673		4	3	
<input type="checkbox"/>	8.80	14.00	-9.00					733905100710		8	2	
<input type="checkbox"/>	54.3	6.00	+6.00	+6.00	6	+6.00	Brown	789789	65454	1	1	

Product Sizes: BC: 54.3, Dia: 6.00, Sph: +6.00, Cyl: +6.00, Axis: 6, Add: +6.00

Color: Brown

Product Code: 789789

UPC Code: 65454

Board Location:

Discontinued: ☐

Date last sold:

Last received:

Inventory:

	PTD	YTD	LY
Qty Sold	0	0	0
Qty Returned	0	0	0
Amount Sold	0.00	0.00	0.00
COGS Sold	0.00	0.00	0.00
Gross Profit	0.00	0.00	0.00

Stocking level: 1

Min: 1

Qty on Hand: 0

On Order: 0

Recorded By: Franklin, Helen

- 10 Type the board location in the **Board Location** text box.
- 11 Select the **Discontinued** check box if the product has been discontinued and this option is available.
- 12 Click **Print Bar Code** to print a barcode for the selected service.
- 13 Click **Save** and select one of the following options:
- **Save** to save the information and keep the Products window open.
 - **Save and New** to save the information and create a new product.
 - **Save and Exit** to close the Products window.

► To record ophthalmic lens optional fees

You can record optional fees for ophthalmic lenses loaded into OfficeMate through the OfficeMate Lens Product Loader. The lens product fee includes the base price and all of the optional fees. The optional fees display in the Eyewear Order window in the Add-Ons box.

For more information on using the OfficeMate Lens Product Loader, go to [Loading Lens Products into OfficeMate on page 75](#).

- 1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).
- 2 Select **Ophthalmic Lenses** from the **Product Type** drop-down menu.
- 3 Enter additional search criteria and click **F2 - Find** to search for and find an existing product that you have loaded into OfficeMate through the OfficeMate Lens Product Loader. For more information on finding products, go to [Finding Products & Services on page 119](#).

Note

Click **Next** and **Previous** to add or modify the previous or next product in your database.

- 4 Click the **Price Details** tab.
- 5 Click the **+** (plus sign) next to the product description.
- 6 Type the optional price in the **Option Fee** box.

Products : Ophthalmic Lenses - BF GH170 FT 28 Clr

Products | Product Details | VSP Product | Price Details

Description	Category	Mat. Group	Material	Type	Color	Coating	Total Fee
BF GH170 FT 28 Clr	Bifocal	Glass Hl Index	GH170	Flat Top 28	Clear		0.00

Option Description: Std Lens Hl Ind Gl 1.60-1.80

Option Fee: 10.00

Save Cancel

- 7 Click **Save**.

Recording Service Information

You can record as little or as much service information in OfficeMate as is necessary for your practice. This section tells you how to record services in OfficeMate, including how

- To add or modify services, 131
- To add additional information to services, 133
- To itemize service details, 136

Notes

- Before you add services to OfficeMate, set up your insurance fee schedule information and procedure codes. To set up insurance information, go to [To modify or add insurance information on page 58](#). To set up procedure codes, go to [To add procedure codes on page 45](#).
- Press the **F12** key when your cursor is in a drop-down box to open a **Maintain** window and add new items to the drop-down menu selections. For more information on using the F12 key, go to [To add and maintain list box selections \(F12\) on page 19](#).

► To add or modify services

- 1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).
- 2 Select **Services** from the **Product Type** drop-down menu.
- 3 Complete one of the following tasks:
 - Click **New Product** to add a new service.
 - Enter additional search criteria and click **F2 - Find** to search for and find an existing service. For more information on finding services, go to [Finding Products & Services on page 119](#).

Notes

- Click **Delete** to delete a service if it is *not* linked to a fee slip, Rx order, or purchase order.
- Click **Next** and **Previous** to add or modify the previous or next service in your database

- 4 Click **Copy** to copy the service details and then make changes to them to record a new service.

OR

Type the service name in the **Product Name** text box.

Note

Name the service a short name (for ease and simplicity) or a number or CPT code with more than one digit.

- 5 Select a description to print on fee slips from the **Print on Fee Slip** drop-down menu.
- 6 Select a stocking type from the **Stocking Type** drop-down menu.

- 7 Select modifiers from the **First Modifier** and **Second Modifier** drop-down lists.

Note

Modifiers will automatically be recorded on the CMS 1500 form in box 24D when the service is billed to an insurance carrier.

- 8 Select the type of service from the **Type of Service** drop-down menu.
- 9 Select tax types from the **Tax Type1** and **Tax Type2** drop-down menus, if applicable.

Note

To add a new tax type and tax percent to your drop-down menu options, place your cursor in the Tax Type1 or Tax Type2 box and then press the **F12** key on your keyboard to open the Maintain Product - Tax Type window. Type and record the tax percentage amounts.

- 10 Select an insurance fee type from the **Ins. Fee Type** drop-down menu.
- 11 Type or select the duration in minutes for the service in the **Duration in Min.** text box, if applicable.
- 12 Type or select the units or days of the service in the **Units or Days** text box, if applicable.

Note

The unites or days of the service is automatically entered on the CMS 1500 form in box 24G.

- 13 Select the **Recall Reminder** check box if you want to be reminded to schedule the patient for a recall when this service is billed on a fee slip.
- 14 Select the **Update Last Exam** check box if you want to update a patient's last exam when this service is billed on a fee slip.

The screenshot shows the 'Products : Services - 11643' window. The 'Product Details' tab is active. The form contains the following fields and values:

- Product Name:** 11643
- Print on Fee Slip:** Excision, Malignant 2.1-3.0 C
- Stocking Type:** Non Stock
- First Modifier:** 24 Unrelated Eval & Mgt Svc I
- Second Modifier:** 26 Component Service
- Type of Service:** Medical Care
- Tax Type1:** Services tax rate
- Tax Type2:** (empty)
- Ins. Fee Type:** (empty)
- Duration in Min.:** 30
- Units or Days:** 1
- Recall Reminder:** ☒
- Update Last Exam:** ☒
- Product Cost:** \$100.00
- Product Fee:** \$150.00
- Cost Changed:** 05/08/2006
- Fee Changed:** 05/08/2006
- New Since:** 08/22/2002
- Inactive:** ☐
- Quick List:** ☒

Additional sections include:

- Additional Fees:** A table with columns 'Patient Fee Type' and 'Fee'. It is currently empty.
- HCFA - 1500 Additional Information:**
 - CPT/HCPCS Code:** 11643 Excision, Malignant 2.
 - Place of Service:** Office
 - EPSDT:** (empty)
 - COB:** (empty)
 - Local Use:** (empty)
 - EMG:** ☐
 - Financial Group:** (empty)
 - Production Group:** (empty)
- Notes:** (empty text area)
- Commission:**
 - Class:** (empty)
 - Method:** ☐ Gross% ☐ Margin% ☐ Set Amount
 - Rate:** (empty)
 - Spill Amount:** \$0.00

Buttons on the right side include: Save, Cancel, Delete, New, Copy, Next, and Previous.

- 15 Type the service cost in the **Product Cost** text box.

- 16 Type the usual and customary service fee in the **Product Fee** text box.

Notes

- The product fee is billed on CMS forms, unless the Use “Product Fee” on CMS preference is set as No. For more information on product fee and CMS preferences, go to [To define and change CMS preferences on page 73](#).
- The product fee is used on fee slips, except in the following situations:
 - The insurance carrier has a recorded fee schedule in OfficeMate.
 - The patient has a fee type different than the product fee.
 - Medicare is billed and there is a Medicare allowable fee.
 - VSP insurance is billed and there is a frames/buying group cost.

- 17 Select the **Inactive** check box if the service is inactive.
- 18 Select the **Quick List** check box to add the service to your Product Quick List window.
- 19 If you want to add more information to the service, go to [To add additional information to services on page 133](#) and [To itemize service details on page 136](#); otherwise, click **Save** and select one of the following options:
- **Save** to save the information and keep the Products window open.
 - **Save and New** to save the information and create a new product.
 - **Save and Exit** to close the Products window.

► To add additional information to services

- 1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).
- 2 Select **Services** from the **Product Type** drop-down menu.
- 3 Complete one of the following tasks:
 - Click **New Product** to add a new service. For more information on adding new services, go to [To add or modify services on page 131](#).
 - Enter additional search criteria and click **F2 - Find** to search for and find an existing service. For more information on finding services, go to [Finding Products & Services on page 119](#).

Notes

- Click **Copy** to copy the service details and then make changes to them to record a new service.
- Click **Next** and **Previous** to add or modify the previous or next service in your database.

- 4 If you want to assign different patient fees for different types of patients, follow the instructions below; otherwise, go to step 5:
 - a. Select a patient fee type from the **Patient Fee Type** drop-down menu.
 - b. Type a fee in the **Fee** text box.

The screenshot shows the 'Products : Services - 11643' window. The 'Product Details' tab is active. The 'Additional Fees' section is highlighted with a red box. It contains a table with columns 'Patient Fee Type' and 'Fee'. The table has one row with 'Employee Fee' and '50.00'. Below the table is a 'Delete Line' button. Other fields in the window include 'Product Name' (11643), 'Tax Type1' (Services tax rate), 'Product Cost' (\$100.00), 'Product Fee' (\$150.00), 'Cost Changed' (05/08/2006), 'Fee Changed' (05/08/2006), 'New Since' (08/22/2002), 'Inactive' (unchecked), 'Quick List' (checked), 'Recall Reminder' (checked), 'Update Last Exam' (checked), 'HCFA - 1500 Additional Information' (CPT/HCPCS Code: 11643, Excision, Malignant 2.), 'Place of Service' (Office), 'EPSDT' (unchecked), 'EMG' (unchecked), 'COB' (unchecked), 'Local Use' (unchecked), 'Financial Group' (empty), 'Production Group' (empty), 'Commission' (Class: empty, Method: Gross%, Margin%, Set Amount), 'Rate' (empty), 'Spff Amount' (\$0.00).

Note To delete an additional fee, select the line and click **Delete Line**.

- 5 Type the Medicare allowable fee in the **Medicare Allowable Fee** text box, if applicable.
- 6 Select a CPT/HCPCS code from the **CPT/HCPCS Code** drop-down menu, if applicable.

Note The CPT/HCPCS code is automatically entered on the CMS 1500 form in box 24D.

- 7 Type Y in the **EPSDT** text box if the product is part of an early periodic screening and diagnostic test or N if the product is not part of an early periodic screening and diagnostic test.

Note The EPSDT is automatically entered on the CMS 1500 form in box 24H.

- 8 Type Y in the **EMG** text box if the product is related to an emergency or type N in the **EMG** text box if the product is not related to an emergency.

Note The EMG is automatically entered on the CMS 1500 form in box 24C.

- 9 Type Y in the **COB** text box if the product has a coordination of benefits.
- 10 Type the product's local use in the **Local Use** text box.
- 11 Select a financial group from the **Financial Group** drop-down menu if the CPT code and financial group are not already linked to each other. To modify

CPT codes and their associated financial groups, go to [To add procedure codes on page 45](#).

- 12 Select a production group from the **Production Group** drop-down menu, if the CPT code and production group are not already linked to each other. To modify CPT codes and their associated production groups, go to [To add procedure codes on page 45](#).

- 13 Type notes in the **Notes** box.
- 14 If you want to add commission information, follow the instructions below; otherwise, go to step 15.
 - a. Select a commission class from the **Class** drop-down menu.
 - b. Select the **Gross%**, **Margin%**, or **Set Amount** Method check box.
 - c. Type the commission percent or dollar amount in the **Rate** text box.
 - d. Type the special incentive dollar amount, if applicable, in the **Spiff Amount** text box.

Note

You do not need to add commission information for each service. To set up commission information for entire service types, go to [To set up commission classes on page 117](#).

- 15 If you want to itemize service details, go to [To itemize service details on page 136](#); otherwise, click **Save** and select one of the following options:
 - **Save** to save the information and keep the Products window open.
 - **Save and New** to save the information and create a new product.
 - **Save and Exit** to close the Products window.

► To itemize service details

If you want to itemize details for your services, complete the instructions below.

- 1 Open the Products window. For more information on opening the Products window, go to [Opening the Products Window on page 118](#).
- 2 Select **Services** from the **Product Type** drop-down menu.
- 3 Complete one of the following tasks:
 - Click **New Product** to add a new service. For more information on adding new services, go to [To add or modify services on page 131](#).
 - Enter additional search criteria and click **F2 - Find** to search for and find an existing service. For more information on finding services, go to [Finding Products & Services on page 119](#).

Notes

- Click **Copy** to copy the service details and then make changes to them to record a new service.
- Click **Next** and **Previous** to add or modify the previous or next service in your database.

- 4 Click the **Product Details** tab.
- 5 Click **New** to add new service details or select in a line in the table to modify product details already recorded.

Note

Select a line and click **Delete** to delete the line if it is *not* linked to a fee slip, Rx order, or purchase order.

- 6 Type the product code in the **Product Code** text box.
- 7 Type the UPC code in the **UPC Code** text box.

Products : Services - 11643

Products | Product Details

Product Code	UPC Code	Board Location
246546	846543246	
456465	546456	

Print Bar Code

Save
Cancel
Delete
New
Copy

Product Code: 456465
UPC Code: 546456
Board Location:

Date last sold: Last received:

	PTD	YTD	LY
Qty Sold			
Qty Returned			
Amount Sold			
COGS Sold			
Gross Profit			

- 8 Click **Print Bar Code** to print a barcode for the selected service.
- 9 Click **Save** and select one of the following options:
 - **Save** to save the information and keep the Products window open.
 - **Save and New** to save the information and create a new product.
 - **Save and Exit** to close the Products window.

CHAPTER 4

Ordering & Tracking Prescriptions

In this chapter:

For more information on ordering prescriptions, see the “[OSSU 301 Creating Rx Orders](#)” iTrain and the OSSU 300-1, “[Creating & Processing Rx Lab Orders](#),” training course.

- [Ordering Eyewear](#), 139
- [Ordering Soft Contact Lenses](#), 150
- [Ordering Hard Contact Lenses](#), 159
- [Tracking Orders](#), 168
- [Pricing VSP Orders](#), 170
- [Viewing Rx Order Statuses](#), 171

OfficeMate’s prescription order forms keep track of eyewear, soft contact lens, and hard contact lens orders that are dispensed, in progress, and waiting to be delivered.

Ordering Eyewear

This section tells you how to order eyewear for patients, including how

- [To open the Eyewear Order window](#), 140
- [To create a new eyewear order](#), 140
- [To redo an eyewear order](#), 148
- [To delete an eyewear order](#), 149

► To open the Eyewear Order window

Open the Eyewear Order window using one of the following methods:

- Click the **Rx/Orders** icon and select **Eyewear Order**.
- Click **Tasks** on the main window toolbar, select **Rx Orders**, and then select **Eyewear**.
- Right-click on a patient in the OfficeMate Information Center window, select **Rx Orders**, and then select **Rx Eyewear**.
- Right-click on the Patient Demographic, Hard Lens Order, Soft Lens Order, Fee Slip, Receipts & Adjustments, or Patient Ledger window title bar, select **Rx Orders**, and then select **Rx Eyewear**.
- Click on a patient's name in the OfficeMate Information Center window and drag and drop the patient on the **Rx/Orders** icon and select **Eyewear**.

► To create a new eyewear order

Notes

- If you want to create a purchase order immediately after creating the eyewear order, select **Display purchase order message from Rx** in the System Preferences window. For more information on setting up your system preferences, see [To define and change other preferences on page 69](#).
- If you created an OfficeMate Rx for the patient in ExamWRITER and clicked **Create Lab Order** on the Spectacle - Final window in ExamWRITER, the Rx will automatically display in the Eyewear Order window.

- 1 Open the Eyewear Order window. For more information on opening the Eyewear Order window, go to [To open the Eyewear Order window on page 140](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to create a new eyewear order.
A list of current and previous lab orders appears. By default, the details of the orders are displayed. The list includes orders on hold or processed in OfficeMate and prescriptions forwarded from ExamWRITER. To display the order prescription information, select the **Rx History** radio button. To display the order history again, select the **Order History** radio button.
- 3 Click an order or prescription from the list to select it.

Note

By default, the most recent order entered in OfficeMate or the most recent prescription forwarded from ExamWRITER is selected.

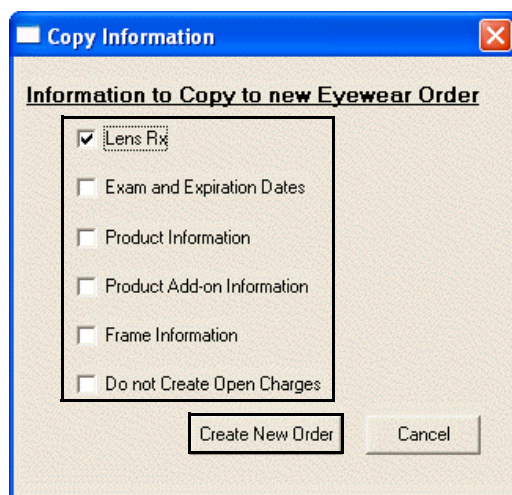
- 4 Click **New/Copy** if you did not transfer an Rx from ExamWRITER to OfficeMate and follow the instructions below; otherwise, go to step 5 to add more information to the Rx prescribed in ExamWRITER.

- a. Select the items that you want to copy to the new eyewear order.

Notes

- If you want to copy the exam and expiration date to the new order, you must select the **Lens Rx** check box first and then select the **Exam and Expiration Dates** check box.
- If you do not want to create open charges in a fee slip for this new order, select the **Do not Create Open Charges** check box.

- b. Click **Create New Order**.



- 5 Type or select the exam date in the **Exam Date** text box.
- 6 Type or select the eyewear order's expiration date in the **Exp Date** text box.
- 7 Select the eyewear order's usage from the **Usage** drop-down menu.
- 8 If the order is a VSP order, select the radio button that corresponds to the type of lab being used.

Notes

- By default, the None radio button is selected.
- If you select VSP Order, the lab order will be transmitted electronically to the lab when the fee slip is recorded.

- Select the **VSP Order** radio button if this is a VSP order being sent to a VSP lab, and if a VSP authorization has been obtained for the patient.

OfficeMate will prompt you to select a VSP Authorization ID.

- Select the **VSP Private Lab Order** radio button if this is a VSP order being sent to a non-VSP lab.
- Select the **None** radio button if this is not a VSP order.

- 9 Select a provider from the **Provider** drop-down menu as needed

Note

If you are working with a prescription that was forwarded from ExamWRITER, the Provider drop-down menu will be populated with the name of the provider that recorded the prescription.

- 10 Select the radio button that corresponds to the pupillary distance measurement
- Select the **BPD** radio button if this is a binocular pupillary distance measurement.
 - Select the **MPD** radio button if this is a monocular pupillary distance measurement.
- 11 Click the blue slider bar or the measurement buttons to add measurements to the **OD** and **OS** text boxes.

OR

Type the appropriate measurements in the **OD** and **OS** text boxes.

Notes

- You do not need to click in the individual OD or OS text boxes and then click on the blue slider bar each time that you record a measurement. Simply click the blue slider bar, and the cursor automatically tabs through the yellow highlighted text boxes as you add measurements.
- If the OD and OS measurements are the same, click the = button.
- If 0 (or a blank field) is recorded for the sphere or cylinder measurements in ExamWRITER, “PLANO” and “SPH.” will be displayed in the Eyewear Order window. The Special Lab Instructions text box on the Lens Order tab will list information about the measurements.
- You must record the sphere *and* cylinder Rx in the Rx Prescription tab before clicking the Lens Order tab and recording the lens order.
- In OfficeMate, if you enter a 0 astigmatism (cylinder) power using the slider bar, “Sph.” appears in the Cylinder box. If you enter a 0 spherical (DS) power using the slider bar, “Plano” appears in the Sphere box. You must record 0 astigmatism and spherical powers using the slider bar (and not your keyboard) in order for “Sph.” and “Plano” to appear in the Cylinder and Sphere boxes.

- 12 If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens, Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

- 13 Type any notes in the **Rx Notes** text box as needed.

Note

Any notes that you type in the Rx Notes field will print on the prescription.

Eyewear Order for Patient: Mary Smith [ALERT]

Last: First: P2 End Order Total: .00

Lab Order History ☐ Rx History ☒ Order History

	Order #	Exam Date	Product Name	Usage	Entry Date	Exp. Date	Fee Slip #	Lab Order #	Ordered
1	6	08/03/2009			08/03/2009	08/03/2011			<input type="checkbox"/>
2									<input type="checkbox"/>
3									<input type="checkbox"/>
4									<input type="checkbox"/>
5									<input type="checkbox"/>

Rx Prescription Lens Order Frame Order

Exam Date: ☐ VSP Order ☐ VSP Private Lab Order ☒ None Order No.:

Exp Date: Provider: Fee Slip No.:

Usage: Recorded By: Entry Date:

	BPD	MPD	Sphere	Cylinder	Axis	Add	H Prism	BS	V Prism	BS	Seg Ht	BC	CT	OC	Underlying Conditions
OD	<input type="text" value="0"/>	<input type="text" value="0"/>	-2.75	-2.75	076	+2.75	2.75BI	2.75BU	14.50	+1.50	2				
OS	<input type="text" value="0"/>	<input type="text" value="0"/>	-2.75	-2.75	076	+2.75	2.75BI	2.75BU	14.50	+1.50					

078 OD: Axis

Rx Notes (Will print on the Rx):

- 14 Click the **Lens Order** tab to continue entering the eyewear order.

- 15 Type the eyewear product code in the **Product Code** text box or type the eyewear product name in the **Name** text box.

OR

Click the **?** next to the **Product Code** or **Name** text box to open the **Find Product** window and search for and select a product.

OR

Place your cursor in the **Product Code** or **Name** text box and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for and select a product.

Notes

- An ophthalmic lens validator in the Eyewear Order window only allows you to select lenses that correspond to the Rx by displaying a valid range of numbers for each field. Lens information on the Lens Order tab is then automatically populated with information from the Products window.
- After you find and select a product code or name, information associated with the product (product code, name, category, material) is recorded in the Product Code, Name, Category, and Material text boxes. After selecting a product on the Lens Order tab, you can no longer select a category, material, or color. If you want to add a new product to your OfficeMate database, click **Add Product** on the **Find Product** or **Eyewear Order** window to open the **Quick New Product Entry** window.
- If you want to prescribe the same products for both the OS and OD, click the **=** button.

- 16 Select the **Edge & Mount**, **Uncut**, **Edge**, or **Mount** radio button.
- 17 Select an eyewear order color and density from the **Color** and **Density** drop-down menus.
- 18 Select the **Solid** or **Grad.** radio button.

- 19 Select add-ons from the **Product Add-Ons** box and click the arrow key to move them into the **Add-Ons Selected** box.

Note

To add Product Add-Ons to the Eyewear Order window, select the **Lens Add-On** and **Frame Add-On** radio buttons in the **Lens Treatments** and **Other** sections of the **Products** window. For more information on product add-ons, see [To add or modify products on page 122](#).

- 20 Enter the appropriate order tracking information.

Note

The following fields, drop-down menus, and radio buttons are used to track orders:

- Order Lens From, Status, and Promise Date drop-down menus
- Lab Order # and Tray # text boxes
- Fit By, Ordered, Received, Notified, and Dispensed radio buttons
- Name and Date drop-down menus

For information about tracking orders, go to [Tracking Orders on page 168](#).

- 21 Type special instructions, if applicable, in the **Special Lab Instructions** text box.
- 22 Click the **Frame Order** tab.

- 23 Follow the instructions below to record the frame status:
- If the patient owns the frame, click the **Enclosed** and **POF** (Patient Owned Frame) radio buttons.
 - If the frame must be ordered, click the **To Come** and **Order Frame** radio buttons and record the appropriate frame order information.
 - If the frame is stocked, click the **Supply** or **Enclosed** radio button and the **Stock** radio button.
 - If you are only ordering lenses, and not a frame, click the **Lens Only** radio button.
 - If you are ordering the frame through VisionWeb, click the **VisionWeb** radio button.

Note

Your inventory quantity-on-hand will *not* decrease if you select the Lens Only, POF, or Order Frame radio button.

- 24 Type the frame product code in the **Product Code** text box or type the frame product name in the **Name** text box.

OR

Click the **?** next to the **Product Code** or **Name** text box to open the **Find Product** window and search for and select a frame.

OR

Place your cursor in the **Product Code** or **Name** text box and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for products.

Note

After you find and select a product code or name, information associated with the product (product code, name, manufacturer, designer, color, material) is recorded in the Product Code, Name, Manufacturer, Designer, Color, and Material text boxes. If there is no additional information that is associated with the product, you can select appropriate options from the **Manufacturer**, **Designer**, **Color**, and **Material** drop-down menus. If you want to add a new product to your OfficeMate database, click **Add Product** on the **Find Product** or **Eyewear Order** window to open the **Quick New Product Entry** window.

Eyewear Order for Patient: Mary Smith [ALERT]

Last: Smith First: Mary F2 Find Order Total: 150.00

Lab Order History

Order #	Exam Date	Product Name	Usage	Entry Date	Exp. Date	Fee Slip #	Lab Order #	Ordered
1	08/03/2009			08/03/2009	08/03/2011			
2								
3								
4								
5								

Rx Prescription Lens Order **Frame Order**

Frame Status: ☐ Supply ☐ Enclosed ☐ To Come

Frame Source: ☐ Lens Only ☒ Stock ☐ POF ☐ Order Frame

Product Code: 789456 ?

Name: Coach45678 ?

Manufacturer: [Dropdown]

Designer: [Dropdown]

Color: Black [Dropdown]

Material: Carbon Fiber Graphite [Dropdown]

Mount: Metal [Dropdown]

Eye DBL Temple A B ED

2 20 10 10 2 11

Record Cancel Delete New / Copy Rejo Print Price Order VSP Orders

- 25 To view the price of the items in the order, click **Price Order**.

The **Price Order** window opens.

Note

If the insurance is VSP Signature Choice plan or VSP Signature plan, the Price Order window sends product descriptions, fees, and wholesale costs (when necessary) to VSP Web Services and retrieves copays, coverage information, and patient out-of-pocket expenses. For more information about pricing VSP orders, go to [Pricing VSP Orders on page 170](#).

- 26 Click **Print**, select **Print Rx** or **Print Order**, and follow the instructions below:
 - If the Report Printer Selection window opens, click **Print Rx** to print the Rx, or click **Printer Setup** to set up the printer. For more information on setting up your printer, see [Setting Up the Printer on page 31](#).
 - If the Eyewear Order window opens, click **Print Order** to print the eyewear order, or click **Printer Setup** to set up the printer. For more information on setting up your printer, see [Setting Up the Printer on page 31](#).
- 27 Click **Record** to record the eyewear order, create a lab order number, and close the Eyewear Order window.

Note

If you record charges and set up your preferences to display a pop-up Patient Open Charges window, the open charges will be displayed in the Fee Slip window.

► **To redo an eyewear order**

Follow the instructions below to redo an eyewear order that you have already created and send it back to the lab.

Note

To restrict specific users from redoing Rx orders, deselect the **Redo Orders** check box on the User Security window. If the **Redo Orders** check box on the User Security window is selected for the user, the user will have to type login security information into the Access Secured Function window to redo the Rx order. For more information on customizing security preferences, go to [Customizing Security Preferences on page 62](#).

- 1 Open the Eyewear Order window. For more information on opening the Eyewear Order window, go to [To open the Eyewear Order window on page 140](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to redo an eyewear order.
- 3 Select the eyewear order that has been ordered and dispensed and that you want you want to redo from the list.

4 Click **Redo**.

5 Follow the instructions in [To create a new eyewear order on page 140](#) to record new eyewear order information.**Note**

You can edit the following fields while redoing an Rx order:

- OD and OS prescription
- Usage
- Wearing Schedule, Replenishment, Disinfecting Regimen
- Keratometry readings
- Supplier
- Tray #
- Status
- Promise Date
- Special Lab Instructions

► **To delete an eyewear order**

- 1 Open the Eyewear Order window. For more information on opening the Eyewear Order window, go to [To open the Eyewear Order window on page 140](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to delete an eyewear order.
- 3 Select the eyewear order that you want you want to delete from the list.
- 4 Click **Delete** and select **Delete Frame**, **Delete Lens Rx**, or **Delete Order**.

- 5 Click **Yes** on the Delete Confirmation window.

Ordering Soft Contact Lenses

This section tells you how to order soft contact lenses for patients, including how

- To open the Soft Lens Order window, 150
- To create a new soft contact lens order, 151
- To redo soft contact lens order, 157
- To delete a soft contact lens order, 158

► To open the Soft Lens Order window

Open the Soft Lens Order window using one of the following methods:

- Click the **Rx/Orders** icon and select **Soft Lens**.
- Click **Tasks** on the main window toolbar, select **Rx Orders**, and then select **Soft Lens**.
- Right-click on a patient in the OfficeMate Information Center window, select **Rx Orders**, and then select **Soft Lens**.
- Right-click on the Patient Demographic, Hard Lens Order, Eyewear Order, Fee Slip, Receipts & Adjustments, or Patient Ledger window title bar, select **Rx Orders**, and then select **Soft Lens**.
- Click on a patient's name in the OfficeMate Information Center window and drag and drop the patient on the **Rx/Orders** icon and select **Soft Lens**.

► To create a new soft contact lens order

Note

If you want to create a purchase order immediately after creating the soft contact lens order, select **Display purchase order message from Rx** in the System Preferences window. For more information on setting up your system preferences, see [To define and change other preferences on page 69](#).

- 1 Open the Soft Lens Order window. For more information on opening the Soft Lens Order window, go to [To open the Soft Lens Order window on page 150](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to create a new soft contact lens order.

A list of current and previous lab orders appears. By default, the details of the orders are displayed. The list includes orders on hold or processed in OfficeMate and prescriptions forwarded from ExamWRITER. To display the order prescription information, select the **Rx History** radio button. To display the order history again, select the **Order History** radio button.
- 3 Click an order or prescription from the list to select it.

Note

By default, the most recent order entered in OfficeMate or the most recent prescription forwarded from ExamWRITER is selected.

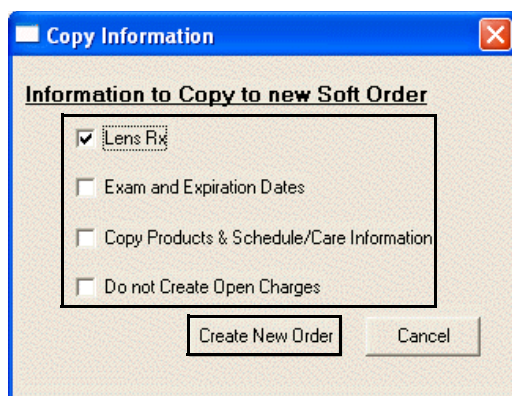
- 4 Click **New/Copy** if you did not transfer an Rx from ExamWRITER to OfficeMate and follow the instructions below; otherwise, go to step 5 to add more information to the Rx prescribed in ExamWRITER.

- a. Select the items that you want to copy to the new soft lens order.

Notes

- If you want to copy the exam and expiration date to the new order, you must select the **Lens Rx** check box first and then select the **Exam and Expiration Dates** check box.
- If you do not want to create open charges in a fee slip for this new order, select the **Do not Create Open Charges** check box.

- b. Click **Create New Order**.

**Note**

If you created an OfficeMate Rx for the patient in ExamWRITER and clicked **Create Lab Order** on the Contact Lens Rx - Final window in ExamWRITER, the Rx will automatically display in the Soft Lens Order window.

- 5 Type or select the exam date in the **Exam Date** text box.
- 6 Type or select the soft contact lens order's expiration date in the **Exp Date** text box.
- 7 Select the soft contact lens order's usage from the **Usage** drop-down menu.
- 8 If this is a VisionWeb order, perform the following steps:
- a. Type or select an order number in the **Order No.** field.
- b. Select a delivery location from the **Deliver To** radio buttons.

- 9 If the order is a VSP order, select the radio button that corresponds to the type of lab being used.

Note By default, the **None** radio button is selected.

- Select the **VSP Order** radio button if this is a VSP order being sent to a VSP lab, and if a VSP authorization has been obtained for the patient.

OfficeMate will prompt you to select a VSP Authorization ID.

- Select the **None** radio button if this is not a VSP order.

- 10 Click the blue slider bar or the measurement buttons to add measurements to the **OD** and **OS** text boxes.

OR

Type the appropriate measurements in the **OD** and **OS** text boxes.

Notes

- You do not need to click in the individual OD or OS text boxes and then click on the blue slider bar each time that you record a measurement. Simply click the blue slider bar, and the cursor automatically tabs through the yellow highlighted text boxes as you add measurements.
- If the OD and OS measurements are the same, click the **=** button.
- If 0 (or a blank field) is recorded for the sphere or cylinder measurements in ExamWRITER, “PLANO” and “SPH.” will be displayed in the Soft Lens Order window. The Special Lab Instructions text box on the Lens Order tab will list information about the measurements.
- You must record the sphere *and* cylinder Rx in the Rx Prescription tab before clicking the Lens Order tab and recording the lens order.
- In OfficeMate, if you enter a 0 astigmatism (cylinder) power using the slider bar, “Sph.” appears in the Cylinder box. If you enter a 0 spherical (DS) power using the slider bar, “Plano” appears in the Sphere box. You must record 0 astigmatism and spherical powers using the slider bar (and not your keyboard) in order for “Sph.” and “Plano” to appear in the Cylinder and Sphere boxes.

- 11 If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.
- 12 Type any notes in the **Rx Notes** text box as needed.

Note Any notes that you type in the Rx Notes field will print on the prescription.

- 13 Select a tint color from the **Tint** drop-down menu.

- 14 Select underlying conditions from the **Underlying Conditions** drop-down menus, if applicable.

- 15 Click the **Lens Order** tab to continue entering the soft lens order.
- 16 Type the soft contact lens product code in the **Product Code** text box or type the soft contact lens product name in the **Lens Name** text box.

OR

Click the **?** next to the **Product Code** or **Lens Name** text box to open the **Find Product** window and search for and select a product.

OR

Place your cursor in the **Product Code** or **Name** text box and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for and select a product.

Notes

- After you find and select a product code or lens name, information associated with the product (product code, lens name, category, manufacturer) is recorded in the Product Code, Lens Name, Category, and Manufacturer text boxes. If there is no additional information that is associated with the product, you can select an appropriate option from the **Manufacturer** drop-down menu, but you cannot select a category from the **Category** drop-down menu. If you want to add a new product to your OfficeMate database, click **Add Product** on the **Find Product** or **Soft Lens Order** window to open the **Quick New Product Entry** window.
- If you want to prescribe the same products for both the OS and OD, click the **=** button.

- 17 Type the number of soft contact lenses that you are ordering in the **Qty.** text boxes.

Note

You can record a contact lens Rx with a quantity of 0. After you record the contact lens Rx, click **No** on the Invalid Data Entry window and then click the **X** in the corner of the Soft Lens Order window.

- 18 Select appropriate Schedule/Care options from the **Wearing Schedule**, **Replenishment**, and **Disinfecting Regimen** drop-down menus.

- 19 Select the **MM** or **Diop** radio button in the Keratometry box and type the appropriate keratometry measurements in the **OD** and **OS** text boxes.

Note

If you want to make the OD and OS prescriptions the same measurement, click the **=** button.

- 20 Select the **Verified** or **Given** radio button in the Training box and then select the provider or staff member that verified or gave training to the patient from the **By** drop-down menu.

- 21 Enter the appropriate order tracking information.

Note

The following fields, drop-down menus, and radio buttons are used to track orders:

- Order Lens From, Status, and Promise Date drop-down menus
- Lab Order # and Tray # text boxes
- Fit By, Ordered, Received, Notified, and Dispensed radio buttons
- Name and Date drop-down menus

For information about tracking orders, go to [Tracking Orders on page 168](#).

- 22 Type special instructions, if applicable, in the **Special Lab Instructions** text box.
- 23 To view the price of the items in the order, click **Price Order**.
The **Price Order** window opens.

Note

If the insurance is VSP Signature Choice plan or VSP Signature plan, the Price Order window sends product descriptions, fees, and wholesale costs (when necessary) to VSP Web Services and retrieves copays, coverage information, and patient out-of-pocket expenses. For more information about pricing VSP orders, go to [Tracking Orders on page 168](#).

- 24 Click **Print**, select **Print Rx** or **Print Order**, and follow the instructions below:
- If the Report Printer Selection window opens, click **Print Rx** to print the Rx, or click **Printer Setup** to set up the printer. For more information on setting up your printer, see [Setting Up the Printer on page 31](#).
 - If the Soft Contact Lens Order window opens, click **Print Order** to print the soft contact lens order, or click **Printer Setup** to set up the printer. For more information on setting up your printer, see [Setting Up the Printer on page 31](#).
- 25 Click **Record** to record the soft contact lens order, create a lab order number, and close the Soft Lens Order window.

Notes

- If you record charges and set up your preferences to display a pop-up Patient Open Charges window, the open charges will be displayed in the Fee Slip window.
- If you recorded a soft lens order with a quantity of 0, click **No** on the Invalid Data Entry window and then click the **X** in the corner of the Soft Lens Order window.

► To redo soft contact lens order

Follow the instructions below to redo a soft lens order that you have already created and send it back to the lab.

Note

To restrict specific users from redoing Rx orders, deselect the **Redo Orders** check box on the User Security window. If the **Redo Orders** check box on the User Security window is selected for the user, the user will have to type login security information into the Access Secured Function window to redo the Rx order. For more information on customizing security preferences, go to [Customizing Security Preferences on page 62](#).

- 1 Open the Soft Lens Order window. For more information on opening the Soft Lens Order window, go to [To open the Soft Lens Order window on page 150](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to delete an soft contact lens order.
- 3 Select the soft lens order that has been ordered and dispensed and that you want you want to redo from the list.

4 Click **Redo**.

Soft Lens Order for Patient: Mary Smith [ALERT]

Last: Smith First: Mary F2 Find... Order Total: .00

Order #	Exam Date	Product Name	Usage	Entry Date	Exp. Date	Fee Slip #	Tray Number	Ordered
1	08/03/2009	B+L OPTIMA 38 NATURAL TINT		08/05/2009	08/03/2010		12543	
2	08/03/2009	Acuvue 1 Day Moist		08/03/2009	08/03/2010			
3								
4								
5								

Rx Prescription

Exam Date: 08/03/2009 Expiration Date: 08/03/2010 Usage: Provider: Carrie, Daniels Recorded By: Carrie, Daniels Order No.: 9 Entry Date: 08/05/2009 Fee Slip No.: VSP Order: None

	BC	Dia.	Sphere	Cylinder	Axis	Add	Seg Ht	Tint	Underlying Conditions
OD	8.50	13.90	-3.25	-3.25	78	+3.25	3.30		
OS	8.50	13.90	-3.25	-3.25	78	+3.25	3.30	Clear	

Rx Notes (Will print on the Rx)

Buttons: Record, Cancel, Delete, New/Copy, Redo, Print, Price Order

5 Follow the instructions in [To create a new soft contact lens order on page 151](#) to record new eyewear order information.**Note**

You can edit the following fields while redoing an Rx order:

- OD and OS prescription
- Usage
- Wearing Schedule, Replenishment, Disinfecting Regimen
- Keratometry readings
- Supplier
- Tray #
- Status
- Promise Date
- Special Lab Instructions

You *cannot* edit the following fields while redoing an Rx order:

- Exam Date
- Expiration Date
- Product Code, Lens Name, Category, Manufacturer

► **To delete a soft contact lens order**

- 1 Open the Soft Lens Order window. For more information on opening the Soft Lens Order window, go to [To open the Soft Lens Order window on page 150](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to delete an soft contact lens order.
- 3 Select the soft lens order that you want you want to delete from the list.

- 4 Click **Delete**.
- 5 Click **Yes** on the Order Delete Warning window.

Ordering Hard Contact Lenses

This section tells you how to order hard contact lenses for patients, including how

- To open the Hard Lens Order window, 159
- To create a new hard contact lens order, 160
- To redo hard contact lens order, 166
- To delete a hard contact lens order, 167

► To open the Hard Lens Order window

Open the Hard Lens Order window using one of the following methods:

- Click the **Rx/Orders** icon and select **Hard Lens**.
- Click **Tasks** on the main window toolbar, select **Rx Orders**, and then select **Hard Lens**.
- Right-click on a patient in the OfficeMate Information Center window, select **Rx Orders**, and then select **Hard Lens**.
- Right-click on the Patient Demographic, Soft Lens Order, Eyewear Order, Fee Slip, Receipts & Adjustments, or Patient Ledger window title bar, select **Rx Orders**, and then select **Hard Lens**.
- Click on a patient's name in the OfficeMate Information Center window and drag and drop the patient on the **Rx/Orders** icon and select **Hard Lens**.

► To create a new hard contact lens order

Note

If you want to create a purchase order immediately after creating the hard contact lens order, select **Display purchase order message from Rx** in the System Preferences window. For more information on setting up your system preferences, see [To define and change other preferences on page 69](#).

- 1 Open the Hard Lens Order window. For more information on opening the Hard Lens Order window, go to [To open the Hard Lens Order window, 159](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to create a new hard contact lens order.

A list of current and previous lab orders appears. By default, the details of the orders are displayed. The list includes orders on hold or processed in OfficeMate and prescriptions forwarded from ExamWRITER. To display the order prescription information, select the **Rx History** radio button. To display the order history again, select the **Order History** radio button.
- 3 Click an order or prescription from the list to select it.

Note

By default, the most recent order entered in OfficeMate or the most recent prescription forwarded from ExamWRITER is selected.

- 4 Click **New/Copy** if you did not transfer an Rx from ExamWRITER to OfficeMate and follow the instructions below; otherwise, go to step 5 to add more information to the Rx prescribed in ExamWRITER.

- a. Select the items that you want to copy to the new hard lens order.

Notes

- If you want to copy the exam and expiration date to the new order, you must select the **Lens Rx** check box first and then select the **Exam and Expiration Dates** check box.
- If you do not want to create open charges in a fee slip for this new order, select the **Do not Create Open Charges** check box.

- b. Click **Create New Order**.



Note

If you created an OfficeMate Rx for the patient in ExamWRITER and clicked **Create Lab Order** on the Contact Lens Rx - Final window in ExamWRITER, the Rx will automatically display in the Hard Lens Order window.

- 5 Type or select the exam date in the **Exam Date** text box.
- 6 Select the hard contact lens order's usage from the **Usage** drop-down menu.
- 7 Type or select the hard contact lens order's expiration date in the **Expiration Date** text box.
- 8 Select the prescribing provider from the **Provider** drop-down menu.
- 9 If the order is a VSP order, select the radio button that corresponds to the type of lab being used.

Notes

- By default, the **None** radio button is selected.
- If you select VSP Order, the lab order will be transmitted electronically to the lab when the fee slip is recorded.

- Select the **VSP Order** radio button if this is a VSP order being sent to a VSP lab, and if a VSP authorization has been obtained for the patient.

OfficeMate will prompt you to select a VSP Authorization ID.

- Select the **None** radio button if this is not a VSP order.

- 10 Click the blue slider bar or the measurement buttons to add measurements to the **OD** and **OS** text boxes.

OR

Type the appropriate measurements in the **OD** and **OS** text boxes.

Notes

- You do not need to click in the individual OD or OS text boxes and then click on the blue slider bar each time that you record a measurement. Simply click the blue slider bar, and the cursor automatically tabs through the yellow highlighted text boxes as you add measurements.
- If the OD and OS measurements are the same, click the = button.
- If 0 (or a blank field) is recorded for the sphere or cylinder measurements in ExamWRITER, “PLANO” and “SPH.” will be displayed in the Hard Lens Order window. The Special Lab Instructions text box on the Lens Order tab will list information about the measurements.
- You must record the sphere *and* cylinder Rx in the Rx Prescription tab before clicking the Lens Order tab and recording the lens order.
- In OfficeMate, if you enter a 0 astigmatism (cylinder) power using the slider bar, “Sph.” appears in the Cylinder box. If you enter a 0 spherical (DS) power using the slider bar, “Plano” appears in the Sphere box. You must record 0 astigmatism and spherical powers using the slider bar (and not your keyboard) in order for “Sph.” and “Plano” to appear in the Cylinder and Sphere boxes.

- 11 If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens, Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.
- 12 Select blends from the **Blend** drop-down menus.
- 13 Select the DOT **OD**, **OS**, or **None** radio button.

- 14 Type any notes in the **Rx Notes** text box as needed.

Note

Any notes that you type in the **Rx Notes** field will print on the prescription.

- 15 Click the **Lens Order** tab.
- 16 Type the hard contact lens product code in the **Product Code** text box or type the hard contact lens product name in the **Name** text box.

OR

Click the **?** next to the **Product Code** or **Name** text box to open the **Find Product** window and search for and select a product.

OR

Place your cursor in the **Product Code** or **Name** text box and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for and select a product.

Notes

- After you find and select a product code or lens name, information associated with the product (product code, lens name, category, manufacturer, tint) is recorded in the Product Code, Lens Name, Category, Manufacturer, and Tint text boxes. If there is no additional information that is associated with the product, you can select an appropriate option from the **Manufacturer** and **Tint** drop-down menus, but you cannot select a category or material from the **Category** or **Material** drop-down menus. If you want to add a new product to your OfficeMate database, click **Add Product** on the **Find Product** or **Hard Lens Order** window to open the **Quick New Product Entry** window.
- If you want to prescribe the same products for both the OS and OD, click the **=** button.

- 17 Type the number of hard contact lenses that you are ordering in the **Qty.** text boxes.

Note

You can record a contact lens Rx with a quantity of 0. After you record the contact lens Rx, click **No** on the Invalid Data Entry window and then click the red **X** in the Hard Lens Order window.

- 18 Select the appropriate Schedule/Care options from the **Wearing Schedule**, **Replenishment**, and **Disinfecting Regimen** drop-down menus.
- 19 Select the **MM** or **Diop** radio button in the Keratometry box and type the appropriate keratometry measurements in the **OD** and **OS** text boxes.

Note

If you want to make the OD and OS prescriptions the same measurement, click the = button.

- 20 Select the **Verified** or **Given** radio button in the Training box and then select the provider or staff member that verified or gave training to the patient from the **By** drop-down menu.
- 21 Enter the appropriate order tracking information.

Note

The following fields, drop-down menus, and radio buttons are used to track orders:

- Order Lens From, Status, and Promise Date drop-down menus
- Lab Order # and Tray # text boxes
- Fit By, Ordered, Received, Notified, and Dispensed radio buttons
- Name and Date drop-down menus

For information about tracking orders, go to [Tracking Orders on page 168](#).

- 22 Type special instructions, if applicable, in the **Special Lab Instructions** text box.

- 23 To view the price of the items in the order, click **Price Order**.
The **Price Order** window opens.

Note

If the insurance is VSP Signature Choice plan or VSP Signature plan, the Price Order window sends product descriptions, fees, and wholesale costs (when necessary) to VSP Web Services and retrieves copays, coverage information, and patient out-of-pocket expenses. For more information about pricing VSP orders, go to [Pricing VSP Orders on page 170](#).

- 24 Click **Print**, select **Print Rx** or **Print Order**, and follow the instructions below:
- If the Report Printer Selection window opens, click **Print Rx** to print the Rx, or click **Printer Setup** to set up the printer. For more information on setting up your printer, see [To define and change other preferences on page 69](#).
 - If the Hard Contact Lens Order window opens, click **Print Order** to print the hard contact lens order, or click **Printer Setup** to set up the printer. For more information on setting up your printer, see [Setting Up the Printer on page 31](#).
- 25 Click **Record** to record the hard contact lens order, create a lab order number, and close the Hard Lens Order window.

Notes

- If you record charges and set up your preferences to display a pop-up Patient Open Charges window, the open charges will be displayed in the Fee Slip window.
- If you recorded a hard lens order with a quantity of 0, click **No** on the Hard Lens Order window.

► To redo hard contact lens order

Follow the instructions below to redo a hard lens order that you have already created and send it back to the lab.

Note

To restrict specific users from redoing Rx orders, deselect the **Redo Orders** check box on the User Security window. If the **Redo Orders** check box on the User Security window is selected for the user, the user will have to type login security information into the Access Secured Function window to redo the Rx order. For more information on customizing security preferences, go to [Customizing Security Preferences on page 62](#).

- 1 Open the Hard Lens Order window. For more information on opening the Hard Lens Order window, go to [To open the Hard Lens Order window, 159](#).
- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to delete a hard contact lens order.
- 3 Select the hard lens order that has been ordered and dispensed and that you want you want to redo from the list.
- 4 Click **Redo**.

Hard Lens Order for Patient: Mary Smith [ALERT]

Last: First: F2 Find Order Total: .00

Order #	Exam Date	Product Name	Usage	Entry Date	Exp. Date	Fee Slip #	Tray Number	Ordered
1	08/03/2009	ACUVUE 2		08/03/2009	08/03/2010	6429		<input checked="" type="checkbox"/>
2								
3								

Rx Prescription

Exam Date: 08/03/2009 Usage: Order No.: 2
 Expiration Date: 08/03/2010 Provider: Carrie, Daniels Recorded By: Carrie, Daniels Entry Date: 08/03/2009 Fee Slip No.: 6429

☐ VSP Order ☒ None

OD

BC	Dia.	Sphere	Cyl.	Axis	Radius 2	Width 2	Radius 3	Width 3	PC Rad	PC Wid	Add	Prism	CT	ET	OZD	Underlying Cond.
8.70	8.70	-1.50	-3.75	80	8.80	.35	8.80	.35	9.85	.35	+4.25	4.25	0.70	0.35	8.35	
BC 2	Dia. 2	Sphere 2	Cyl. 2	Axis 2	Radius 2	Width 2	Radius 3	Width 3	PC Rad	PC Wid	Blend					
7.55	8.70	-3.75	-3.75	81	8.85	.35	8.85	.35	9.85	.35						

OS

BC	Dia.	Sphere	Cyl.	Axis	Radius 2	Width 2	Radius 3	Width 3	PC Rad	PC Wid	Add	Prism	CT	ET	OZD	Underlying Cond.
7.55	8.70	-3.75	-3.75	80	8.80	.35	8.80	.35	9.85	.35	+4.25	4.25	0.70	0.35	8.35	
BC 2	Dia. 2	Sphere 2	Cyl. 2	Axis 2	Radius 2	Width 2	Radius 3	Width 3	PC Rad <td>PC Wid</td> <td>Blend</td> <td colspan="5"></td>	PC Wid	Blend					
7.55	8.70	-3.75	-3.75	81	8.85	.35	8.85	.35	9.85	.35						

Rx Notes (Will print on the Rx):

Buttons: Record, Cancel, Delete, New/Copy, Redo, Print, Price Order

- Follow the instructions in [To create a new hard contact lens order on page 160](#) to record new eyewear order information.

Note

You can edit the following fields while redoing an Rx order:

- OD and OS prescription
- Usage
- Wearing Schedule, Replenishment, Disinfecting Regimen
- Keratometry readings
- Supplier
- Tray #
- Status
- Promise Date
- Special Lab Instructions

You *cannot* edit the following fields while redoing an Rx order:

- Exam Date
- Expiration Date

► **To delete a hard contact lens order**

- Open the Hard Lens Order window. For more information on opening the Hard Lens Order window, go to [To open the Hard Lens Order window, 159](#).
- Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to delete a hard contact lens order.
- Select the hard lens order that you want you want to delete from the list.
- Click **Delete**.
- Click **Yes** on the Order Delete Confirmation window.

Hard Lens Order for Patient: Mary Smith [ALERT]

Last: First: F2 Find Order Total:

Lab Order History

	Order #	Exam Date	Product Name	Usage	Entry Date	Exp. Date	Fee Slip #	Tray Number	Ordered
1	2	08/03/2009			08/03/2009	08/03/2010			
2									
3									

☐ Rx History ☒ Order History

Rx Prescription

Exam Date: Usage: Order No.:
 Expiration Date: Provider: Recorded By: Entry Date: Fee Slip No.:
☐ VSP Order ☒ None

Lens Order

BC Dia. Sphere Cyl. Axis Radius 2 Width 2 Radius 3 Width 3 PC Rad PC Wid Add Prism CT ET OZD Underlying Cond.

BC	8.7	8.70	-1.5	-3.75	80	8.80	.35	8.80	.35	9.85	.35	+4.25	4.25	0.70	0.35	8.35	
BC 2	7.55	8.70	-3.75	-3.75	81	8.85	.35	8.85	.35	9.85	.35						

OS

BC	7.55	8.70	-3.75	-3.75	80	8.80	.35	8.80	.35	9.85	.35	+4.25	4.25	0.70	0.35	8.35	
BC 2	7.55	8.70	-3.75	-3.75	81	8.85	.35	8.85	.35	9.85	.35						

Rx Notes (Will print on the Rx)

Buttons: Record, Cancel, Delete, New/Copy, Redo, Print, Price Order

Tracking Orders

For more information on tracking prescriptions, see the “OSSU 302 Tracking Rx Orders & Lab Orders” iTrain.

This section tells you how to track eyewear, soft contact lens, and hard contact lens orders through the entire order and delivery process.

- 1 Open the Eyewear Order, Soft Lens Order, or Hard Lens Order window and find and select the order that you want to track. For information on opening the Eyewear Order window, go to [To open the Eyewear Order window on page 140](#). For information on opening the Soft Lens Order window, go to [To open the Soft Lens Order window on page 150](#). For information on opening the Hard Lens Order window, go to [To open the Hard Lens Order window on page 159](#).
- 2 Select the name of the vendor from which you ordered lenses, if applicable, from the **Order Lens From** (for eyewear orders) or **Supplier** (for soft and hard contact lens orders) drop-down menu.

Note

The vendor that you select from the Order Lens From and Supplier drop-down menus must be set up to provide lab products and services. For more information on setting up vendors in OfficeMate, go to [To modify or add vendor names on page 54](#).

- 3 If you want to record the lab order number, type the lab order number in the **Lab Order #** text box.
- 4 Select the status of the order from the **Status** drop-down menu (for eyewear orders).
- 5 If you want to record the lab order tray number, type the tray number in the **Tray #** text box.
- 6 Type or select the date you promise the eyewear order will be available to the patient in the **Promise Date** text box.
- 7 Type special instructions, if applicable, in the **Special Lab Instructions** text box.

Eyewear Order for Patient: Mary Smith [ALERT]

Last: Smith First: Mary F2 Find Order Total: 150.00

Lab Order History

Order #	Exam Date	Product Name	Usage	Entry Date	Exp. Date	Fee Slip #	Lab Order #	Ordered
6	08/03/2009	BF GH170 FT 28 Clr		08/03/2009	08/03/2011			
2								
3								
4								
5								

Rx Prescription

Lens Order

Product Code: ? Name: BF GH170 FT 28 Clr ? Category: Bifocal Material: Glass HI Index: ? Color: ?

OS: ? Name: BF GH170 FT 28 Clr ? Category: Bifocal Material: Glass HI Index: ? Color: ?

Edge & Mount: ☒ Edge ☐ Mount ☐ Uncut ☐ Edge ☐ Mount

Tint: Color: Blue Density: # 1 ☒ Solid ☐ Grad.

Add-Ons: (Acclare) AR Coating (AcuityPLUS Platinum XP) AR Coat (AcuityPLUS Platinum) AR Coating (AcuityPLUS Titanium) AR Coating (Allure) AR Coating (AR Coating B) Lens Add On (AR Coating C) Lens Add On (AR-X Performance Plus) AR Coat (AR-X Performance) AR Coating

(Std Lens HI Ind Gl 1.60-1.80) Lens A (Std Lens HI Ind Gl 1.60-1.80) Lens A

Frame Order

Order Lens From: Ophthalmic Lenses Status: Delivered to Patient Lab Order #: 45645 Promise Date: 09/03/2009 Tray #: 789

Special Lab Instructions

Fit By: ☒ Ordered ☐ Received ☐ Notified ☐ Dispensed ☐ Cancelled ☐ Verified By

Buttons: Record, Cancel, Delete, New / Copy, Rego, Print, Price Order, VSP Orders

- 8 Select one of the following tracking radio buttons:
- **Fit By** to indicate that the order was recently fit by a doctor or staff member.
 - **Ordered** to indicate that the order was placed.
 - **Received** to indicate that the order was received.
 - **Notified** to indicate that the patient was notified that the order was received.
 - **Delivered** to indicate that the order was delivered.

Note

Lab order reports are generated based on the radio button that you select. For more information on reports, see [Creating & Printing Reports, Statements, & Graphs on page 369](#).

- 9 Select the name of the doctor or staff member who fit, ordered, received, notified, or delivered the order from the **Name** drop-down menu.
- 10 Select or type the date the order was fit, ordered, received, notified, or delivered in the **Date** text box.

Eyewear Order for Patient: Mary Smith [ALERT]

Last: First: F2 Find Order Total: 150.00

	Order #	Exam Date	Product Name	Usage	Entry Date	Exp. Date	Fee Slip #	Lab Order #	Ordered
1	6	08/03/2009	BF GH170 FT 28 Clr		08/03/2009	08/03/2011			
2									
3									
4									
5									

Rx Prescription

Lens Order

Product Code: Name: Category: Material: Color:

OD: OS:

Edge & Mount: ☒ Edge ☐ Mount

Tint: Density: ☒ Solid ☐ Grad.

Order Lens From: Status:

Lab Order #: Promise Date:

Tray #:

Special Lab Instructions

Fit By

☒ Fit By ☐ Ordered ☐ Received ☐ Notified ☐ Dispensed ☐ Cancelled ☐ Verified By

Record Cancel Delete New / Copy Redo Print Price Order VSP Orders

Pricing VSP Orders

The Patient Out-of-Pocket Expense Calculator provides cost estimates and patient out-of-pocket charges for all products, including lenses and frames, sold to patients participating in the VSP Signature Choice plan and VSP Signature plan. All information is provided in real time so that you can help patients decide what products are right for them before they make their final purchases. If your patient changes his or her mind and wants to select other products, simply update the order or fee slip and recalculate the out-of-pocket expenses.

Note

You must be using the OfficeMate VSP Interface to use the OfficeMate Patient Out-of-Pocket Expense Calculator.

This calculator takes the guess work out of determining the patient's out-of-pocket expenses on the Rx windows and calculating the patient's benefits on the Fee Slip window!

- 1 From within the Eyewear Order, Soft Lens Order, Hard Lens Order, or Fee Slip windows, click **Price Order** to send product descriptions, fees, and wholesale costs (when necessary) to VSP Web Services and retrieve copays, coverage information, and patient out-of-pocket expenses.

Note

For information about opening the Eyewear Order, Soft Lens Order, Hard Lens Order, or Fee Slip windows, refer to the following sections:

- [Ordering Eyewear, 139](#)
- [Ordering Soft Contact Lenses on page 150](#)
- [Ordering Hard Contact Lenses on page 159](#)
- [Creating & Opening Fee Slips on page 190](#)

- 2 Review the out-of-pocket calculations with the patient. Click **Print** to print the calculations as needed.

Item Description	Covered	Product Fee	Ins. Coverage	Co-Pay	Out-of-Pocket	Non-Covered Reason
BF PL FT 22 Clr	NO		0.00			
BF PL FT 22 Clr	NO		0.00			
100 Lens Tx	NO	60.00	0.00	0.00	60.00	Not Covered
Sub Totals		60.00	.00	.00	60.00	

Disclaimer:
This calculator is provided for illustrative purposes only. Although we believe the calculations are accurate, we cannot guarantee accuracy. The VSP Family of Companies disclaims any liability or responsibility for calculation errors. Final expenses will be determined when the claim is submitted.

Total: 60.00

Print Close

- 3 Click **Close** when you are finished reviewing the out-of-pocket calculations with the patient.
- 4 If the patient changes his or her mind, perform the following steps
 - a. Update the Eyewear Order, Soft Lens Order, Hard Lens Order, or Fee Slip window as needed.
 - b. Repeat steps 1–3.

Viewing Rx Order Statuses

This section tells you how to view the status of eyewear, soft contact lens, and hard contact lens orders that you've already recorded.

- 1 Open the Rx Order Status window using one of the following methods:
 - Click the **Rx/Orders** icon and select **Rx Status**.
 - Click **Tasks** on the main window toolbar, select **Rx Orders**, and then select **Rx Status**.
- 2 Click the **Spectacle**, **Soft Contact**, or **Rigid Contact** tab.
- 3 Search for the status of Rx orders using one of the following methods:
 - Select an order status from the **Status** drop-down menu.
 - Type or select an order entry date in the **Entry Date** text box.
 - Click **Today's Orders** to view the status of today's orders.
 - Type or select an order promise date in the **Promised Date** text box.
 - Click **Promised Today** to view the status of orders promised today.

The screenshot shows the 'Rx Order Status - All orders that have not yet been delivered.' window. It features three tabs: 'Spectacle' (selected), 'Soft Contact', and 'Rigid Contact'. Below the tabs are search filters: 'Status' (set to '(All)'), 'Entry Date' (with forward and backward arrows), and 'Promised Date' (with forward and backward arrows). There are buttons for 'Refresh', 'Today's Orders', 'Promised Today', and 'Print Grid'. A table displays the following data:

RxID	Billed	Patient Name	Day Phone	Promised Date	Tray Number	Lab Name	Status	Fit Date	Order Date	Rcvd. Date
1	<input checked="" type="checkbox"/>	Michael Gray	(949) 588-8663	05/11/2007	44646	Omega Optical	Ordered		05/11/2007	Dr.
3	<input type="checkbox"/>	Sherlock Holmes	949				Fitted			Dr.
5	<input checked="" type="checkbox"/>	James Jones	949				Fitted			Mc
53	<input checked="" type="checkbox"/>	Adam Ark	(949) 951-3034				Fitted			Mc
54	<input checked="" type="checkbox"/>	Adam Ark	(949) 951-3034				Fitted			Mc
56	<input type="checkbox"/>	Adam Ark	(949) 951-3034				Fitted			Mc
67	<input type="checkbox"/>	James Jones	949				Fitted			Dr.
59	<input type="checkbox"/>	Jackson Abbot					Fitted			Dr.
57	<input type="checkbox"/>	Adam Ark	(949) 951-3034				Fitted			Mc

At the bottom, it says 'Total Orders: 9'.

Notes

- Click **Refresh** to refresh the Rx Order status grid that is displayed.
- Click **Print Grid** to print the Rx Order Status grid displayed in the window.
- Click the green and white arrows next to the Entry Date and Promised Date text boxes to move forward or backward one day and display that new date's Rx order statuses.

CHAPTER 5

Recalling Patients

In this chapter:

For more information on creating, modifying, and deleting recall schedules, see the “OSSU 102 Customizing OfficeMate” and “OSSU 202 Checking In Patients” iTrains.

- [Creating New Recall Schedules, 173](#)
- [Modifying Recall Schedules, 175](#)
- [Deleting Recall Schedules, 175](#)
- [Assigning Recall Dates to Patients, 176](#)
- [Creating Recall Letters, 177](#)
- [Printing Recall Correspondences, 180](#)

Recall schedules describe when a patient will be selected for a recall and, if they do not respond, how often and when to make other recall attempts.

Creating New Recall Schedules

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Recall** tab.
- 3 Click **New Recall**.
- 4 Type the name of the new recall schedule in the **Recall Type** text box.
- 5 Type the number of months until the patient will be recalled in the **Months to Next Recall** text box.
- 6 Type the number of weeks or months between the patient’s recall date and the notice that you are creating in the Renewal Notice Mailing Schedule **#** column.
- 7 Select **Month(s)** or **Week(s)** from the **Period** column drop-down menu.
- 8 Select **After** or **Before** from the **When** column drop-down menu.

- 9 Select the type of recall letter or postcard to print from the **Print Letters/Postcard** column drop-down menu.

Customization

Service Agreement | Duplication Fees | Procedure Codes | Marketing
List Box Selections | Diagnosis Codes | ZIP Code Shortcuts | **Recall**

Select Recall Type: [Dropdown] Delete Recall

Recall Type: 24 Month New Recall

Recall Notice Mailing Schedule Months to Next Recall: 18

#	Period	When	What Date	Print Letters/Postcard
1	24 Month(s)	Before	Recall Date	2 Years - Adult
2				
3				
4				
5				
6				
7				

↑ ↓ Insert Line Delete Line Compose Letter

OK Cancel

Note

If there is no appropriate letter or postcard to select from the Print Letters/Postcard column drop-down menu, click **Compose Letter** to open CARE or the Maintain Documents window and compose a letter.

- 10 Repeat steps 3–9 to create additional new recall schedules.

OR

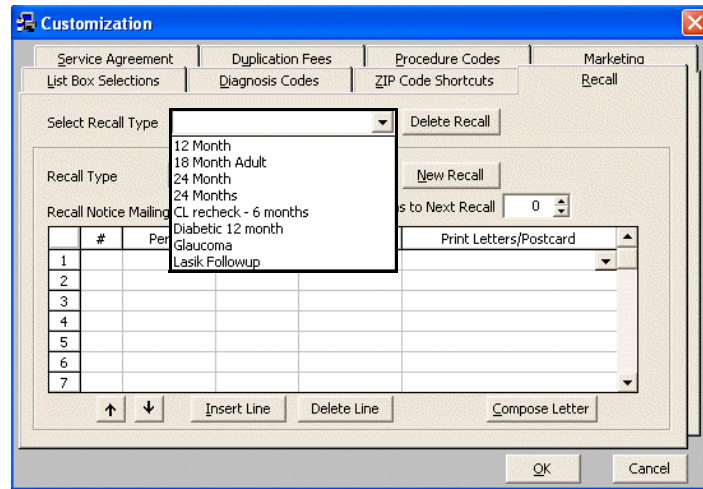
Click **OK** to close the Customization window.

Note

To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.

Modifying Recall Schedules

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Recall** tab.
- 3 Select a recall type from the **Select Recall Type** drop-down menu.



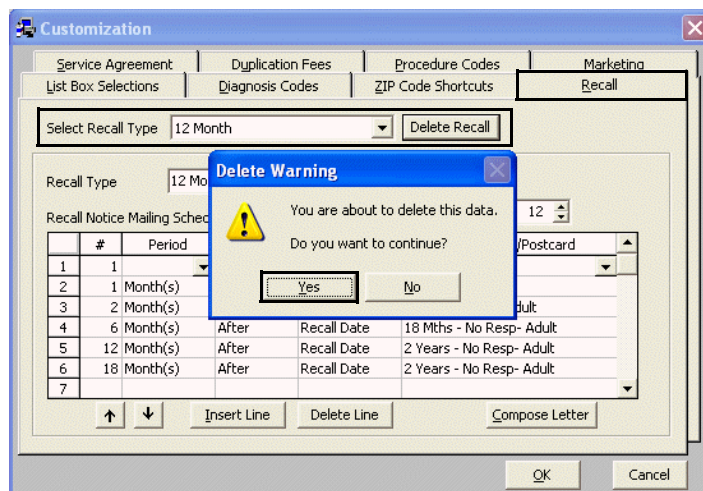
- 4 Modify the **Recall Type** and **Months to Next Recall**.
 - 5 See [Creating New Recall Schedules on page 173](#), steps 5–9, to modify the information in the **Recall Notice Mailing Schedule** table.
 - 6 To delete a mailing schedule, select a line and click **Delete Line**.
 - 7 To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.
 - 8 Repeat steps 3–7 to modify additional recall schedules.
- OR
- Click **OK** to close the Customization window.

Deleting Recall Schedules

Note You can only delete recall schedules that are *not* linked to patients.

- 1 On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
- 2 Click the **Recall** tab.
- 3 Select a recall type from the **Select Recall Type** drop-down menu.
- 4 Click **Delete Recall**. The **Delete Warning** window opens.

- 5 Click **Yes** to continue.



- 6 Click **OK** to close the Customization window.

Assigning Recall Dates to Patients

You can assign up to three recall schedules to a patient in the Patient Demographic window.

Note

Before you assign recall schedules to a patient, see [Creating New Recall Schedules on page 173](#) to create a new recall schedule or [Modifying Recall Schedules on page 175](#) to modify an existing recall schedule.

For more information on recalling patients, see the "OSSU 202 Checking In Patients" iTrain and the OSSU 200-1, "Checking In Patients," training course.

- 1 Open a patient record. For more information, see [Creating & Opening Patient Records on page 79](#).
- 2 Click the **Recall** tab in the Patient Demographic window.

Note

You can view the recall history for the patient in the **Recall History** box.

- 3 Select recall types from the **Recall Type** drop-down menus.

- 4 To change the recall date, type or select the number of months until the next recall in the **Months to Recall** text box or type or select a recall date in the **Next Recall** text box.

Note

If the patient has an insurance plan with an eligibility period, the number of eligible months between exams will appear in the **Eligibility (months)** text box after you select a recall type.

Patient: Steven Davis 55 (949) 555-7463 [NOTES] Balance: \$0.00

Demographic Insurance Marketing Notes Recall Financial Info Correspondence Hx HIPAAMate eDocuments

Recall For Steven Davis

Recall Type	Months to Recall	Next Recall	Eligibility (months)
12 Month	1	09/06/2008	
Glaucoma	6	02/01/2009	
	0		

Recall History

Print Date	Recall Type	Document Printed	Notice #
05/30/2002	Diabetic 12 month	Diabetic 2	2
03/28/2002	Diabetic 12 month	Diabetic 1	1
01/01/2002	CL recheck - 6 months	Contact Lens Recheck 2 PC	2
09/29/2001	CL recheck - 6 months	Contact Lens Recheck 1 PC	1
05/02/2001	Glaucoma	Glaucoma 2	2
05/02/2001	Diabetic 12 month	Diabetic 2	2

Patient # 8
HIPAA
OK
Cancel
New
F2 Find
Letters
Ledger
Label
Glance
ExamWRITER
Find Appts
Charges
1 Encounters

Creating Recall Letters

For more information on creating recall letters using the Maintain Documents window, go to [Maintaining Documents on page 495](#).

This section tells you how to create recall letters to send to your patients including how

- To create a new recall letter, 177
- To modify a recall letter, 179

► To create a new recall letter

- 1 Select a recall schedule and click **Compose** in the Customization window's Recall tab. For more information, see [Creating New Recall Schedules on page 173](#).

OR

Click **Tasks** on the main window toolbar and select **Maintain Documents**.

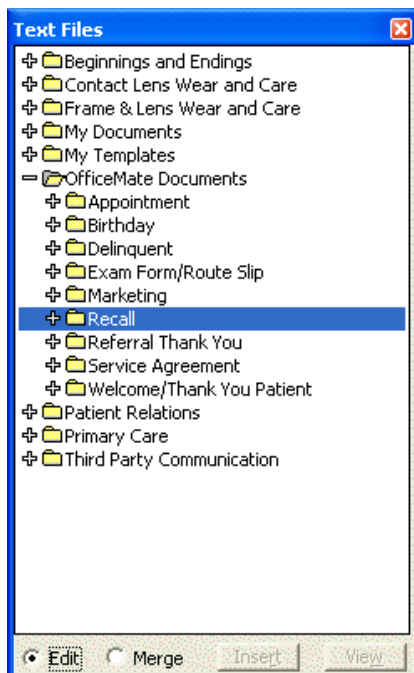
The **CARE from OfficeMate** or **Maintain Documents** window opens.

- 2 Click **Setup** and select **Text Files**.

The **Text Files** window opens.

- 3 Click the **OfficeMate Documents** folder.

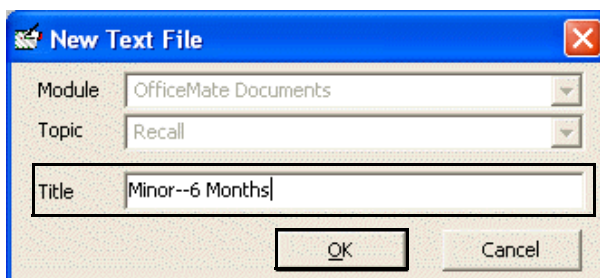
- 4 Click the **Recall** folder.



- 5 Click **File** on the CARE from OfficeMate or Maintain Documents window toolbar and select **New**.

The **New Text File** window opens.

- 6 Type a title for the new text file in the **Title** box.
- 7 Click **OK**.



- 8 Type the letter in the word processing window.
- 9 Click **File** on the CARE from OfficeMate or Maintain Documents window toolbar and select **Save**.

► To modify a recall letter

- 1 Select a recall schedule and click **Compose** in the Customization window's Recall tab. For more information, see [Creating New Recall Schedules on page 173](#).

OR

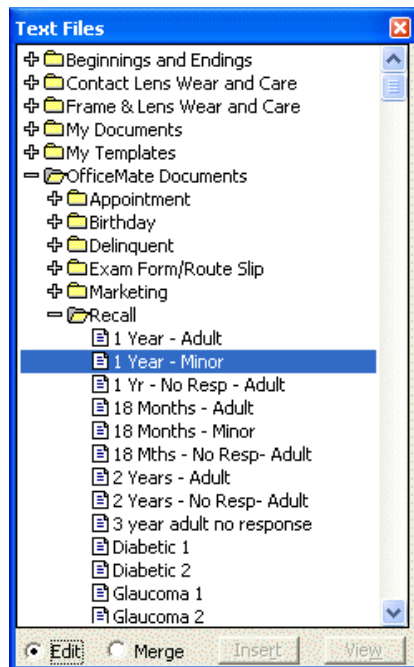
Click **Tasks** on the main window toolbar and select **Maintain Documents**.

The **CARE from OfficeMate** or **Maintain Documents** window opens.

- 2 Click **Setup** and select **Text Files**.

The **Text Files** window opens.

- 3 Click the **OfficeMate Documents** folder.
- 4 Click the **Recall** folder.
- 5 Click on the name of the text file that you want to modify.



- 6 Edit the text in the word processing window.
- 7 Click **File** on the CARE from OfficeMate or Maintain Documents window toolbar and select **Save**.

Printing Recall Correspondences

You can print recall correspondences any time that it is convenient. Follow the instructions below

- To print recall correspondence, 180
- To print a list of patients that you want to recall, 183
- To print labels for patients that you want to recall, 185

► To print recall correspondence

Note

Print recall correspondence using 8½" x 11" paper stock or office letterhead, or postcard stock with four cards on 8½" x 11" sheets. You can purchase postcards from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com or from Marchon Eyewear at 1.800.645.1300.

- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Correspondence**.
- 2 Select **Recall**.

The **Process Recalls** window opens.

Note

- Click **History** to view the recall correspondence printing history.
- Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

- 3 Type or select dates in the Selection Range **From** and **To** boxes.
- 4 Select the **Last Name** or **ZIP Code** Order By radio button to sort the patients alphabetically by last name or numerically by ZIP code.

- 5 Select the **Select all names** check box if you want to print recall correspondence for all of the patients in the date selection range.

OR

Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print recall correspondence for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print recall correspondence for patients with last names that begin with G–Z.

Process Recalls

Selection Range From: 12/09/2004 To: 12/09/2005 Order By: ☒ Last Name ☐ ZIP Code

Additional Printing: ☐ Labels ☐ Listing Order By: ☒ Last Name ☐ ZIP Code

Print	Patient Name	Print Letter/Postcard

☒ Do Not Print Letters / Postcards Total Selected: 0

☐ Select all names Starting Last: G

Start Selection Print Cancel History Printer Setup

- 6 Click **Start Selection**.

A list of patients meeting your selection criteria is displayed.

- 7 Click **Print**.

Process Recalls

From: To: Order By: ☒ Last Name ☐ ZIP Code

Selection Range:

Additional Printing: ☐ Labels ☐ Listing

Order By: ☒ Last Name ☐ ZIP Code

Print	Patient Name	Print Letter/Postcard
<input checked="" type="checkbox"/>	Cole, Harper	2 Years - No Resp - Adult 02/21/2005
<input checked="" type="checkbox"/>	Davis, Steven	Diabetic 2 12/29/2004
<input checked="" type="checkbox"/>	Davis, Steven	1 Yr - No Resp - Adult 11/29/2005
<input checked="" type="checkbox"/>	Davis, Steven	Contact Lens Recheck 1 PC 04/22/2005
<input checked="" type="checkbox"/>	Davis, Steven	Contact Lens Recheck 2 PC 05/29/2005
<input checked="" type="checkbox"/>	Davis, Steven	Contact Lens Recheck 2 PC 06/29/2005
<input checked="" type="checkbox"/>	Davis, Steven	Glaucoma 1 01/28/2005
<input checked="" type="checkbox"/>	Davis, Steven	Glaucoma 2 03/07/2005
<input checked="" type="checkbox"/>	Davis, Steven	Glaucoma 2 04/28/2005
<input checked="" type="checkbox"/>	Mitchell, Henry	2 Years - No Resp - Adult 02/21/2005
<input checked="" type="checkbox"/>	Radmore, Michelle	1 Year - Postcard 03/20/2005

☐ Do Not Print Letters / Postcards Total Selected:

☒ Select all names

Start Selection **Print** Cancel History Printer Setup

The **Report Printer Selection** window opens.

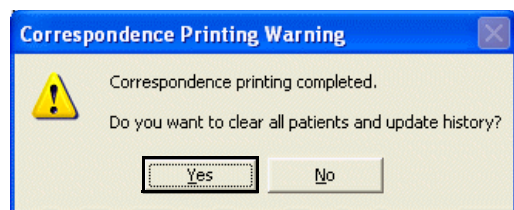
- 8 Click one of the following buttons:
- **Print** to print the recall letters for the selected patients.
 - **Skip** to skip the current print selection and go to the next print selection.
 - **Test Print** to print a sample recall letter.
 - **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).
 - **Options** (for postcards) to select a printing method.



- 9 Click **OK** in the Job Completed window.



- 10 Click **Yes** in the Correspondence Printing Warning window if you are finished printing this group of recall correspondence and you want to update the patient demographic information and recall history.



► To print a list of patients that you want to recall

Note	Print lists using 8½" x 11" paper stock.
-------------	--

1 Click **Tasks** on the OfficeMate main window toolbar and select **Correspondence**.

2 Select **Recall**.

The **Process Recalls** window opens.

Note	<ul style="list-style-type: none">• Click History to view the recall correspondence printing history.• Click Printer Setup to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, see Setting Up the Printer on page 31.
-------------	---

3 Type or select dates in the Selection Range **From** and **To** boxes.

4 Select the Additional Printing **Listing** check box.

5 Select the **Last Name** or **ZIP Code** Order By radio button to sort the patients alphabetically by last name or numerically by ZIP code.

6 Select the **Do Not Print Letter/Postcards** check box if you only want to print a list of patients and not the actual letters and postcards.

- 7 Select the **Select all names** check box if you want to print a list of recall correspondence for all of the patients in the date selection range.

OR

Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print a list of recall correspondence for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print a list of recall correspondence for patients with last names that begin with G–Z.

The screenshot shows a software window titled "Process Recalls". At the top right is a red close button. Below the title bar are two rows of controls. The first row has labels "From" and "To" above date pickers showing "12/09/2004" and "12/09/2005". To their right is an "Order By:" section with radio buttons for "Last Name" (selected) and "ZIP Code". The second row features an "Additional Printing:" label followed by checkboxes for "Labels" and "Listing" (which is checked). Further right is another "Order By:" section with radio buttons for "Last Name" (selected) and "ZIP Code". Below these controls is a large table with three columns: "Print", "Patient Name", and "Print Letter/Postcard". The table contains several empty rows. A vertical scrollbar is visible on the right side of the table. At the bottom of the window is a summary area containing a checkbox labeled "Do Not Print Letters / Postcards" which is checked, a disabled checkbox labeled "Select all names", a text field labeled "Starting Last" containing the letter "G", a label "Total Selected:", and an empty numeric input field. Along the very bottom edge are five buttons: "Start Selection", "Print", "Cancel", "History", and "Printer Setup".

- 8 Click **Start Selection**.

A list of patients meeting your selection criteria is displayed.

- 9 Click **Print**.

Process Recalls

Selection Range From To Order By

12/09/2004 12/09/2005 ☒ Last Name
☐ ZIP Code

Additional Printing

☒ Labels ☒ Listing Order By: ☒ Last Name ☐ ZIP Code

Print	Patient Name	Print Letter/Postcard
<input checked="" type="checkbox"/>	Mitchell, Henry	2 Years - No Resp- Adult 02/21/2005
<input checked="" type="checkbox"/>	Radmore, Michelle	1 Year - Postcard 03/20/2005
<input checked="" type="checkbox"/>	Radmore, Michelle	1 Year - Adult 05/20/2005
<input checked="" type="checkbox"/>	Radmore, Michelle	1 Yr - No Resp - Adult 06/20/2005
<input checked="" type="checkbox"/>	Radmore, Michelle	18 Mths - No Resp- Adult 10/20/2005
<input checked="" type="checkbox"/>	Radmore, Michelle	Contact Lens Recheck 2 PC 12/20/2004
<input checked="" type="checkbox"/>	Ressler, Margaret	18 Mths - No Resp- Adult 01/30/2005
<input checked="" type="checkbox"/>	Ressler, Margaret	2 Years - No Resp- Adult 07/30/2005
<input checked="" type="checkbox"/>	Underwood, Jennifer	18 Mths - No Resp- Adult 01/30/2005
<input checked="" type="checkbox"/>	Underwood, Jennifer	2 Years - No Resp- Adult 07/30/2005
<input checked="" type="checkbox"/>	Underwood, Tracy	2 Years - No Resp- Adult 02/21/2005

☒ Do Not Print Letters / Postcards Total Selected: 11

☐ Select all names Starting Last G

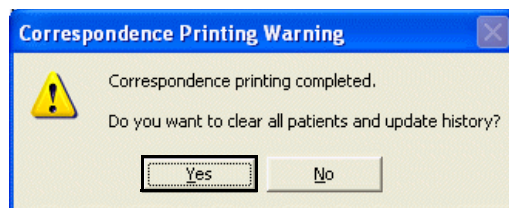
Start Selection **Print** Cancel History Printer Setup

The **Report Printer Selection** window opens.

- 10 Click one of the following buttons:
 - **Print** to print the list of selected patients.
 - **Skip** to skip the current print selection and go to the next print selection.
 - **Test Print** to print a sample list.
 - **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).



- 11 Click **Yes** in the Correspondence Printing Warning window if you are finished printing this group of recall correspondence and you want to update the patient demographic information and recall history.



► To print labels for patients that you want to recall

Note

Print labels using Avery 5260 compatible white rectangular labels. You can purchase these labels from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com.

- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Correspondence**.
- 2 Select **Recall**.

The **Process Recalls** window opens.

Note

- Click **History** to view the recall correspondence printing history.
- Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

- 3 Type or select dates in the Selection Range **From** and **To** boxes.
- 4 Select the Additional Printing **Labels** check box.

- 5 Select the **Last Name** or **ZIP Code** Order By radio button to sort the patients alphabetically by last name or numerically by ZIP code.
- 6 Select the **Do Not Print Letter/Postcards** check box if you only want to print patient labels and not the actual letters and postcards.
- 7 Select the **Select all names** check box if you want to print labels for all of the patients in the date selection range.

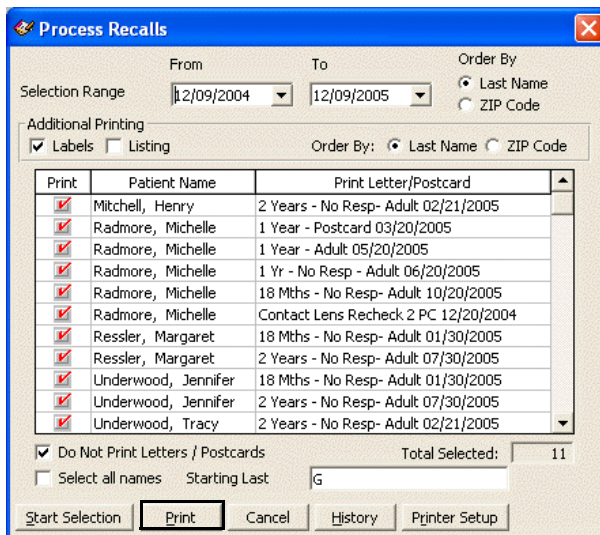
OR

Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print labels for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print labels for patients with last names that begin with G–Z.

[illegible]

- 8 Click **Start Selection**.
- A list of patients meeting your selection criteria is displayed.

- 9 Click **Print**.

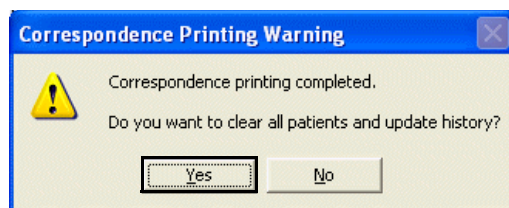


The **Report Printer Selection** window opens.

- 10 Click one of the following buttons:
- **Print** to print the list of selected patients.
 - **Skip** to skip the current print selection and go to the next print selection.
 - **Test Print** to print a sample list.
 - **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).
 - **Options** to select a printing type.



- 11 Click **Yes** in the Correspondence Printing Warning window if you are finished printing this group of recall correspondence and you want to update the patient demographic information and recall history.



CHAPTER 6

Creating & Recording Fee Slips

In this chapter:

- [Creating & Opening Fee Slips, 190](#)
- [Recording Information on Fee Slips, 193](#)
- [Holding Fee Slips, 201](#)
- [Recording Fee Slips & Printing Receipts, 202](#)
- [Voiding Fee Slips, 202](#)
- [Viewing & Printing CMS 1500 Forms, 203](#)

For more information on creating and recording fee slips, see the ["OSSU 203 Checking Out Patients"](#) iTrain and the OSSU 200-2, ["Checking Out Patients,"](#) training course.

After you sell a product or service, record the charges and payments for the product or service on a fee slip.

Notes

Before you begin recording charges and payments on a fee slip, complete the following tasks:

- Set up insurance information. For more information on setting up insurance information, see [To modify or add insurance information on page 58](#).
- Set up products and services. For more information on setting up products and services, see [Recording Product Information on page 121](#).
- Set up fee slip preferences. For more information on setting up fee slip preferences, see [To define and change other preferences on page 69](#).

Creating & Opening Fee Slips

Note

If you want to change the fee slip's posting date to backdate the fee slip, go to [Changing the Posting Date on page 30](#).

- 1 Open the Fee Slip window using one of the following methods:
 - Click the **Fee Slips** icon.
 - Click **Tasks** on the main window toolbar and select **Fee Slip**.
 - Right-click on a patient in the OfficeMate Information Center window and select **Fee Slip**.
 - Right-click on the Patient Demographic, Eyewear Order, Hard Lens Order, Soft Lens Order, Receipts & Adjustments, or Patient Ledger window title bar and select **Fee Slip**.
 - Click on a patient's name in the OfficeMate Information Center window and drag and drop the patient on the **Fee Slip** icon.

Notes

- If you set up your preferences to display a pop-up Patient Open Charges window in the Fee Slip window, a Patient Open Charges window opens if the patient has open charges. Click on the red check marks to deselect items that you do not want to add to the fee slip or delete and then click **Post** to add the selected open charges to the fee slip or click **Close out** to delete the selected open charges. If you do not want to post or delete the open charges, click **Exit** to close the Patient Open Charges window. Deselected items will continue to appear in the Patient Open Charges window until they are posted to a fee slip or deleted. For more information on setting up your pop-up Patient Open Charges preferences, go to [To define and change other preferences on page 69](#). For more information on recording prescription charges, go to [Ordering & Tracking Prescriptions on page 139](#).
- If you are an ExamWRITER user and you record an exam with a lab order and schedule an examination, the scheduled orders are displayed in the Patient Open Charges window in OfficeMate. Select the provider or staff member who you want to schedule the orders, select the orders to schedule, and click **Post to Task List** to post the scheduling orders task to the Task Manager. For more information about using the Task Manager, go to [Using the Task Manager on page 473](#).

- Type a fee slip number in the **Fee Slip #** text box and click **Get Slip** to view other fee slips for the patient, if available.
- The RFR box is color coded to quickly notify you of the patients' identify safeguard information. For more information on the RFR column and box, go to [To record financial information on page 94](#).

- 2 Enter search information in the Last and First name text boxes and click **F2 Find** to find the patient for which you want to create a new fee slip.

Notes

- If you set up your preferences to display a pop-up Patient Open Charges window in the Fee Slip window, a Patient Open Charges window opens if the patient has open charges. Click on the red check marks to deselect items that you do not want to add to the fee slip or delete and then click **Post** to add the selected open charges to the fee slip or click **Close out** to delete the selected open charges. If you do not want to post or delete the open charges, click **Exit** to close the Patient Open Charges window. Deselected items will continue to appear in the Patient Open Charges window until they are posted to a fee slip or deleted. For more information on setting up your pop-up Patient Open Charges preferences, go to [To define and change other preferences on page 69](#). For more information on recording prescription charges, go to [Ordering & Tracking Prescriptions on page 139](#).
- If you are an ExamWRITER user and you record an exam with a lab order and schedule an examination, the scheduled orders are displayed in the Patient Open Charges window in OfficeMate. Select the provider or staff member who you want to schedule the orders, select the orders to schedule, and click **Post to Task List** to post the scheduling orders task to the Task Manager. For more information about using the Task Manager, go to [Using the Task Manager on page 473](#).

	Date	Description	Order #	Unit Price	Qty	Total	CPT	ICD-9	Insurance
<input checked="" type="checkbox"/>	04/30/2009	Executive	5	0.00	1	0.00	0		
<input checked="" type="checkbox"/>	04/30/2009	Executive	5	0.00	1	0.00	0		
<input checked="" type="checkbox"/>	04/30/2009	AR Coating	5	0.00	1	0.00	0		
<input checked="" type="checkbox"/>	04/30/2009	Lens Add On	5	0.00	1	0.00	0		

	Description	Type
<input checked="" type="checkbox"/>	Schedule on or about 04/30/2010: Examination: Contact Lens Examination	Examination
<input checked="" type="checkbox"/>	Schedule on or about 04/30/2010: Examination: OS: Contact Lens Dispensing	Examination

- Type a fee slip number in the **Fee Slip #** text box and click **Get Slip** to view other fee slips for the patient, if available.
- The RFR box is color coded to quickly notify you of the patients' identify safeguard information. For more information on the RFR column and box, go to [To record financial information on page 94](#).

- 3 Select the patient's provider from the **Provider** drop-down menu.

- 4 Select the name of the provider or staff member who is creating the fee slip from the **Recorded By** drop-down menu if this field is not locked.

Note

You can assign a default Recorded By user and identify the logged in user as the default person who is recording transactions in the System Preferences and User Security for Employee windows. For more information on defining a default Recorded By user and identifying his or her security level, go to [To define and change patient preferences on page 68](#) and [Customizing Security Preferences on page 62](#).

Recording Information on Fee Slips

This section tells you how to record information on fee slips, including how

- [To record product & service information, 194](#)
- [To delete items from fee slips, 198](#)
- [To record payments, 198](#)
- [To apply discounts, 200](#)
- [To update recall information, 200](#)

► To record product & service information

- 1 Create or open a fee slip. For more information on creating and opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Select product names and codes using one of the following methods:
 - Type the product name or code in a **Product Name/Code** empty cell.

Notes

- If you type the product name and code in the Product Name/Code cell and you assign the item to an insurance carrier, you will not be able to produce an accurate CMS 1500 form.
- The information that you type in the Product Name/Code cell will be available in the Handwritten/No Category section in your Production reports.

- Type a few letters or numbers of the product name or code in a **Product Name/Code** empty cell and then click the **Product Name/Code** column button to open the **Find Product** window and search for and select a product.

Product Name/Code	Print Name	Color	Eye	DBL	Tmpl	Brdg	BC	Dia	Sphere	Cyl	Axis	Add	On Hand	UPC
Acuvue [73390510035] Multipack Acuv							8.80	14.00	-4.50	0.00	0	0.00	0	
Acuvue [73390510037] Multipack Acuv							8.80	14.00	-4.75	0.00	0	0.00	0	
Acuvue [73390510039] Multipack Acuv							8.80	14.00	-5.00	0.00	0	0.00	0	
Acuvue [73390510041] Multipack Acuv							8.80	14.00	-5.25	0.00	0	0.00	0	
Acuvue [73390510043] Multipack Acuv							8.80	14.00	-5.50	0.00	0	0.00	-4	
Acuvue [73390510045] Multipack Acuv							8.80	14.00	-5.75	0.00	0	0.00	0	
Acuvue [73390510047] Multipack Acuv							8.80	14.00	-6.00	0.00	0	0.00	-4	
Acuvue [73390510051] Multipack Acuv							8.80	14.00	-6.50	0.00	0	0.00	0	
Acuvue [73390510055] Multipack Acuv							8.80	14.00	-7.00	0.00	0	0.00	0	
Acuvue [73390510059] Multipack Acuv							8.80	14.00	-7.50	0.00	0	0.00	0	
Acuvue [73390510063] Multipack Acuv							8.80	14.00	-8.00	0.00	0	0.00	0	
Acuvue [73390510067] Multipack Acuv							8.80	14.00	-8.50	0.00	0	0.00	0	

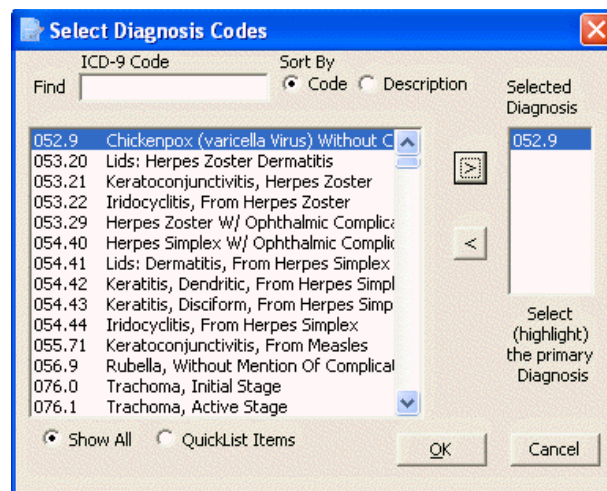
- Type ? in a **Product Name/Code** empty cell and then click the **Product Name/Code** column button to open the **Find Product** window and search through all of your products and select one for the fee slip.
- Type % and any of the letters of the product name in the **Product Name/Code** empty cell and then click the **Product Name/Code** column button to open the **Find Product** window and search through all of your products that contain the letters that you typed and select one for the fee slip.

- Place your cursor in a **Product Name/Code** empty cell and then press the **F5** key to open the **Product Quick List** window and select a product or service that you frequently use. For more information on setting up products and services, see [Recording Product Information on page 121](#).
- Click the **Product Name/Code** column heading to open the **Find Product** window and search for and select a product.
- Place your cursor in a **Product Name/Code** empty cell and press the **Ctrl** and **P** keys at the same time to open the **Find Product** window and search for and select a product.
- Place your cursor in a **Product Name/Code** empty cell and scan product names and codes into the Fee Slip window using your barcode scanner.

Note

After you find and select a product code or name, information associated with the product (product name/code, CTP code, fee amount, patient amount, and provider/staff member) is recorded in the Product Name/Code, CPT, Fee, Patient, and Provider/Staff Member columns.

- 3 Place your cursor in the **ICD-9** cell and select an ICD-9 code using one of the following methods:
 - Select a code from the drop-down menu (if available).
 - Press the **Ctrl** and **D** keys at the same time to open the **Select Diagnosis Codes** window and search for and select a diagnosis code.
 - Place your cursor in the **ICD-9** cell and press the **F5** key to open the **Select Diagnosis Codes** window in the QuickList Items view.



- 4 Select an insurance carrier from the **Insurance** column drop-down menu, if applicable.

- 5 Type the quantity of the item that you sold in the **Qty** cell.
- 6 If you want to modify the fee amount, coverage percentage, patient amount, or insurance amount, type new numbers in the **Fee**, **Cov%**, **Patient**, and **Insur** cells.

Note

If the insurance type for the item is VSP and you want to record a negative amount in the Fee or Patient column, type a minus sign in front of the amount in the **Fee** or **Patient** cell. For more information on setting up insurance types, go to [To modify or add insurance information on page 58](#).

- 7 If you want to select a different provider or staff member for the item, select a provider or staff member from the **Provider/Staff Member** column drop-down menu.
- 8 If a product does not have a CPT code or if you want to add item modifiers, remove the sales tax, keep the item from printing on the fee slip receipt, or record additional information for an item on the fee slip, select an item on the fee slip and click **Line Add'l Data** or press the **F4** key to open the **Fee Slip Item Additional Data** window and follow the instructions below:
 - To apply a discount to an item, select the discount type from the **Discount Type** drop-down menu, type the discount amount in the **Discount** text box, and select the **Amount** or **Percent** radio button (if available).

Note

You can only discount items that are billed to patients.

- To remove sales tax for tax exempt items, delete numbers in the **Sales Tax %** and **2nd Tax** text boxes.
- To add sales tax to an item, type amounts in the **Sales Tax %** and **2nd Tax** (if applicable) text boxes.

- To select a CPT/HCPCS code for an item, select an appropriate CPT/HCPCS code from the **CPT/HCPCS** drop-down menu.
- To record insurance codes that justify overcharges or undercharges for an item, select modifiers in the **Modifier(s)** box.
- To change the name of the provider for the item, select a provider from the **Provider** drop-down menu (if available).
- To change the service dates for the item, type or select dates in the **Service Date** text boxes.
- To add your own comments to the item, type text in the **Item Narrative** text box.

Note

The text that you type in the Item Narrative text box appears in electronic claims files and in place of box 19 on the printed CMS 1500 form.

- If you do not want to print the item on the fee slip, select the **Do not print on patient statement** check box (if available).

Notes

- Selecting the **Do not print on patient statement** check box temporarily effects balances on the financial statement.
- You must select the **Yes** radio button in the System Preferences window's Statements tab to select the Do not print on patient statement check box in the Fee Slip Item Additional Data window. For more information on selecting Statements system preferences, go to [To define and change statement preferences on page 72](#).

Fee Slip Item Additional Data

Product: 101 COACH ASTOR (679516719029)

Discount Type: []

Discount: 0.00 Amount Percent

Sales Tax %: 0.3000 2nd Tax: 0.1500

CPT/HCPCS: V2020 Designer Frame

Modifier(s): 21 Prolonged Evaluation & Manageme, 22 Unusual Service, 24 Unrelated Eval & Mgt Svc by Same, 25 Sig, Sep Ident Eval & Mgt Same Dr

Provider: Ruiz, M.D., Raymond

Service Date: 09/22/2006 To 09/22/2006

Note Reference: []

Item Narrative: []

☐ Do not print on patient statement

OK Cancel

► To delete items from fee slips

Note

You must have two or more items recorded on a fee slip before you can delete an item.

- 1 Open a fee slip that contains items that you want to delete. For more information on opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Select an item to delete.
- 3 Click **Delete Line**.
The **Line Delete Warning** window opens.
- 4 Click **Yes** to delete the item from the fee slip.



► To record payments

Check, cash, and other payments can be accepted on fee slips. Payments can only be applied to items recorded on fee slips. If a payment amount exceeds the fee slip amount, the excess amount is either recorded as a credit or applied to any previous fee slip balances, depending on your preferences. For more information on fee slip preferences, go to [To define and change other preferences on page 69](#).

- 1 Create or open a fee slip. For more information on creating and opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Record product and service information on the fee slip. For more information on recording product and service information, go to [Recording Information on Fee Slips on page 193](#).

- 3 Click the **Check**, **Cash**, or **Other** tab and follow the instructions below for the payment method that you selected.

Note

You can select multiple payment methods; however, in order to avoid double-posting payments, you must correct any errors that you make when you enter the payment amount *before* you click another payment tab and enter additional payment amounts.

- If you are recording a check payment, type the amount, check number, and bank number in the **Amount**, **Check #**, and **Bank #** text boxes.

The screenshot shows the 'Payments' form with the 'Check' tab selected. The form contains three input fields: 'Amount' with the value '100.00', 'Check #' with the value '123', and 'Bank #' with the value '123456789'. At the bottom, the 'Total Payments' field shows '100.00'.

- If you are recording a cash payment, type the payment amount and the amount tendered in the **Amount** and **Tendered** text boxes.

The screenshot shows the 'Payments' form with the 'Cash' tab selected. The form contains three input fields: 'Amount' with the value '150.00', 'Tendered' with the value '200.00', and 'Change' with the value '50.00'. At the bottom, the 'Total Payments' field shows '150.00'.

- If you are recording another payment type, type the payment amount in the **Amount** text box and select the payment type from the **Type** drop-down menu.

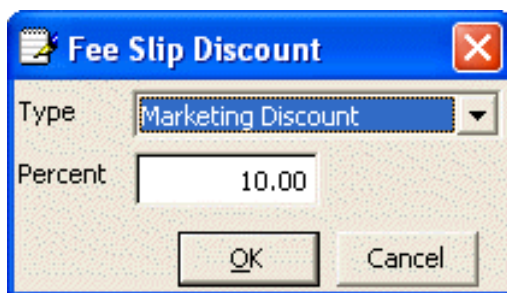
The screenshot shows the 'Payments' form with the 'Other' tab selected. The form contains two input fields: 'Amount' with the value '100.00' and 'Type' with a drop-down menu. The drop-down menu is open, showing a list of payment types: American Express, Discover, Gift Certificate, Master Card, Money Order, and Visa. At the bottom, the 'Total Payments' field shows '100.00'.

► To apply discounts

Notes

- This section instructs you on how to discount an entire fee slip. To apply discounts to a single item in a fee slip, go to step 8 in [To record product & service information on page 194](#).
- You can only record discounts on fee slips on which patients are billed.

- 1 Open a fee slip that contains items to which you want to apply discounts. For more information on opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Record product and service information on the fee slip. For more information on recording product and service information, go to [Recording Information on Fee Slips on page 193](#).
- 3 Click **Discount**.
The **Fee Slip Discount** window opens.
- 4 Select a discount type from the **Type** drop-down menu.
- 5 Type a percentage amount in the **Percent** text box.



- 6 Click **OK**.

► To update recall information

Note

If the service(s) that you are recording on the fee slip are set up to display an automatic recall reminder when you record a fee slip, a Recall Reminder window opens asking if you want to update or set the patient's recall information. For more information on setting up recall reminders for services, go to [To add or modify services on page 131](#).

- 1 Create or open a fee slip. For more information on creating and opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Click **Recall**.
The **Recall** window opens.
- 3 Select recall types from the **Recall Type** drop-down menus.

- 4 Type or select the number of months until the next recall in the **Months to Recall** text box or type or select the next recall date in the **Next Recall** text box.

Recall			
Recall Type	Months to Recall	Next Recall	Eligibility (months)
Diabetic 12 month	-2	11/29/2004	
CL recheck - 6 months	3	04/29/2005	
Glaucoma	1	02/04/2005	

Recall History			
Print Date	Recall Type	Document Printed	Notice #
05/30/2002	Diabetic 12 month	Diabetic 2	2
03/28/2002	Diabetic 12 month	Diabetic 1	1
01/01/2002	CL recheck - 6 months	Contact Lens Recheck 2 PC	2
09/29/2001	CL recheck - 6 months	Contact Lens Recheck 1 PC	1
05/02/2001	Glaucoma	Glaucoma 2	2
05/02/2001	Diabetic 12 month	Diabetic 2	2

- 5 Click **OK**.

Holding Fee Slips

- 1 Create or open a fee slip. For more information on creating and opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Click **Hold**.

Notes

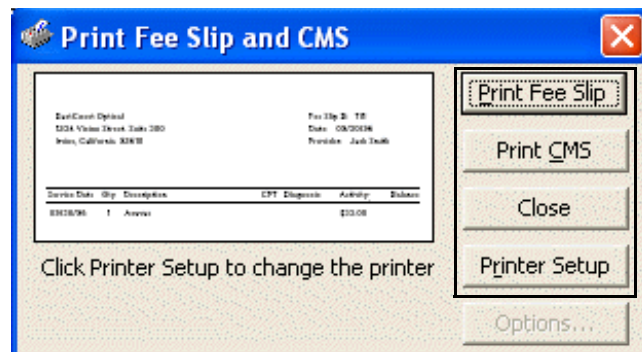
- To view fee slips on hold, select the **All** or **Current Patient** radio button and click **On Hold**. The **Slip(s) on Hold** options are located in the bottom left corner of the Fee Slip window.
- To track fee slips on hold, create the Fee Slips on Hold report. For more information on the Fee Slips on Hold report, go to [Fee Slips on Hold on page 421](#).

Recording Fee Slips & Printing Receipts

Notes

- Print receipts using 8½" x 11" paper stock.
- Mail receipts using #10 single window envelopes or #10 standard envelopes. Use #9 standard envelopes as return envelopes.
- Print CMS 1500 forms using Single Laser Sheet Claim Forms. OfficeMate recommends ordering CMS 1500 forms from the U.S. Government Bookstore at <http://bookstore.gpo.gov/actions/GetPublication?stocknumber=017-060-00655-2>. You can also purchase CMS 1500 forms from Dependable Business Products at 800.747.7210.

- 1 Create or open a fee slip. For more information on creating and opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Record product and service information on the fee slip. For more information on recording product and service information, go to [Recording Information on Fee Slips on page 193](#).
- 3 Click **Record** and follow the instructions below to record the fee slip and print a receipt or CMS 1500 form.
 - Click **Print Fee Slip** to print a receipt.
 - Click **Print CMS** to print the CMS 1500 form.
 - Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).
 - Click **Close** to close the Print Fee Slip and CMS window.

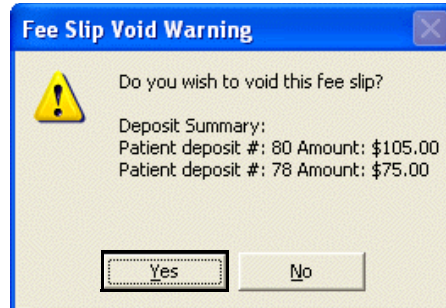


Voiding Fee Slips

For more information on voiding fee slips, see the [“How To - Void a Fee Slip”](#) iTrain.

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Select the fee slip that you want to void.
- 3 Click **Edit Slip**.
The **Fee Slip** window opens.

- 4 Click **Void**.
The **Fee Slip Void Warning** window opens.
- 5 Click **Yes** to void the fee slip.



Note If payments are recorded on a voided fee slip, the payment amount is added to the patient or insurance company credit balance.

Viewing & Printing CMS 1500 Forms

- 1 Create or open a fee slip. For more information on creating and opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Record product and service information on the fee slip. For more information on recording product and service information, go to [Recording Information on Fee Slips on page 193](#).
- 3 Click **CMS-1500**.
The CMS 1500 form opens.
- 4 If you want to add, edit, or delete information on the form, type text into the text boxes. For more information on modifying the CMS 1500 form, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#).
- 5 If you want to update the form with new information that you recently entered into OfficeMate, click **Refresh**.

Note If you typed text into text boxes on the form, the information that you entered will be deleted when you click **Refresh**.

- 6 Click **Print** to print the form.

Notes

- To adjust the margins on the CMS 1500 form, go to [To adjust CMS 1500 form margins on page 357](#).
- Print CMS 1500 forms using Single Laser Sheet Claim Forms. OfficeMate recommends ordering CMS 1500 forms from the U.S. Government Bookstore at <http://bookstore.gpo.gov/actions/GetPublication?stocknumber=017-060-00655-2>. You can also purchase CMS 1500 forms from Dependable Business Products at 800.747.7210.

- 7 Click **OK** to close the CMS 1500 form.

CHAPTER 7

Scheduling, Moving, & Cancelling Appointments

In this chapter:

- Opening & Viewing the Appointment Scheduler, 205
- Setting Up the Appointment Scheduler, 208
- Searching for Appointments, 223
- Scheduling Appointments, 226
- Recording Patients Shows and No Shows, 235
- Moving Appointments, 236
- Copying Appointments, 237
- Cancelling Appointments, 238
- Deleting Appointments, 239
- Confirming Appointments, 240
- Printing Patient Welcome Forms, 243

Schedule, move, change, and cancel new and existing patient appointments using the Appointment Scheduler's daily, work week, and monthly views.

Opening & Viewing the Appointment Scheduler

This section tells you how to open the Appointment Scheduler and modify your viewing options, including how

- To open the Appointment Scheduler, 206
- To view resources in the Appointment Scheduler, 206
- To modify viewing options in the Appointment Scheduler, 208

Note

Click **Refresh** to refresh the Appointment Scheduler at any time with the most up-to-date appointment information.

► To open the Appointment Scheduler

Use one of the following methods to open the Appointment Scheduler:

- Click the **Scheduler** icon.
- Click **Tasks** on the main window toolbar and select **Schedule**.
- Right-click on a patient in the OfficeMate Information Center window and select **Schedule**.
- Right-click on the Patient Demographic, Hard Lens Order, Soft Lens Order, Eyewear Order, Fee Slip, Receipts & Adjustments, or Patient Ledger window title bar and select **Schedule**.
- Click on a patient's name in the OfficeMate Information Center window and drag and drop the patient on the **Schedule** icon.

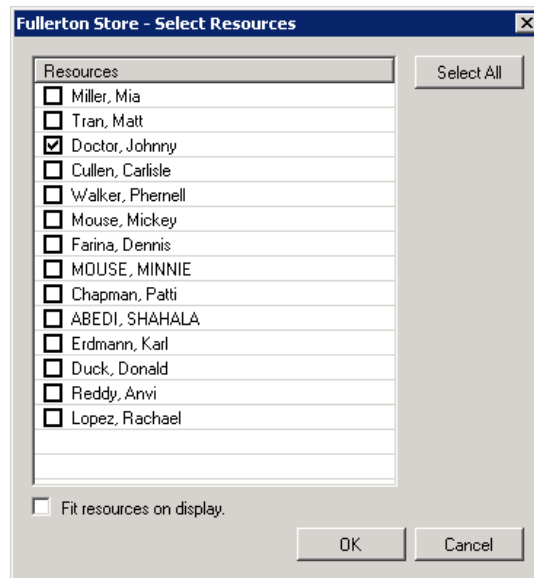
Note

After you open the Appointment Scheduler, leave it open throughout the day to schedule, move, and cancel appointments. Closing and reopening the Appointment Scheduler many times throughout the day will negatively impact the speed of the OfficeMate Appointment Scheduler.

► To view resources in the Appointment Scheduler

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **View** and select **Resources**.
OR
Click the **Resources** button on the Appointment Scheduler toolbar.
The **Select Resources** window opens.

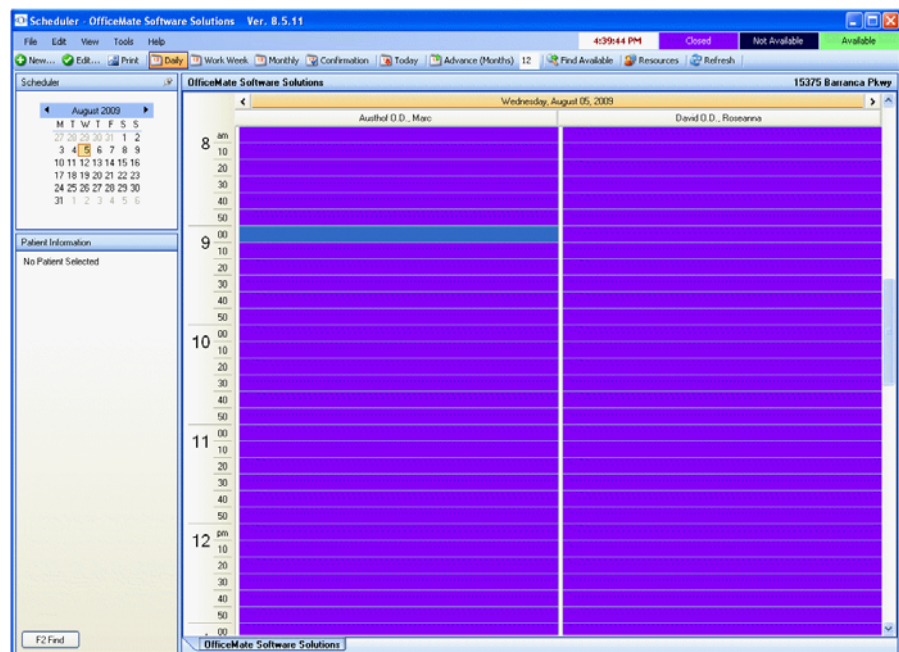
- 3 Select the resources that you want to view on the daily, work week, and monthly views and click **OK**.



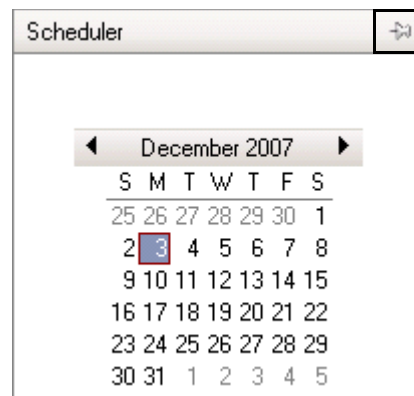
The Appointment Scheduler views will display the resources that you selected.

Note

To view a resource that you selected in the monthly view, click the down arrow next to the resource's name in the top left corner of the window and select the resource that you want to view.



- ▶ **To modify viewing options in the Appointment Scheduler**
- ❖ To view resource availability exceptions, click **View** and ensure that the **Resource Availability Exceptions** options has a check mark next to it; if it does not have a check mark next to it, select it.
- ❖ To modify your Appointment Scheduler view, click **View** and select **Daily**, **Work Week**, or **Monthly**. You can also modify your Appointment Scheduler view by clicking the **Daily**, **Work Week**, and **Monthly** buttons in the Appointment Scheduler toolbar.
- ❖ To hide the calendar in the top left corner of the Appointment Scheduler, click the thumbtack (Auto Hide) icon.



Setting Up the Appointment Scheduler

Before you begin using OfficeMate to schedule, move, change, and cancel patient appointments, set up the Appointment Scheduler. This section tells you how to set up the Appointment Scheduler, including how

- [To set up preferences, 209](#)
- [To set up services, 211](#)
- [To set up services, 211](#)
- [To set up service groups, 212](#)
- [To set up provider & resource hours, 213](#)
- [To set up service templates, 215](#)
- [To set up provider & resource exceptions, 218](#)
- [To set up service reminders, 219](#)
- [To set up insurance reminders, 221](#)
- [To set up appointment icons, 222](#)

Note

You must set up the Appointment Scheduler before you begin scheduling appointments.

► To set up preferences

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Scheduler Preferences**.
The **Scheduler Preferences** window opens.
- 3 Select one of the following options from the **Phone #** box to denote your preference for recording patients' phone numbers when scheduling appointments:
 - Not Required
 - Warn if Missing
 - Always Required
- 4 Select one of the following options from the **Insurance** box to denote your preference for recording patients' insurance information when scheduling appointments:
 - Not Required
 - Warn if Missing
 - Always Required
- 5 Select one of the following options from the **Patient for appointment** box to denote your preference for recording patients when scheduling appointments (for example, if you select "Not Required," then you will be able to schedule time for non-patient appointments, such as office meetings and breaks):
 - Not Required
 - Warn if Missing
 - Always Required
- 6 If you want to change the colors used to denote appointments and available time periods, click **Change** next to Closed, Available, or Not Available, in the System colors box. Select a color from the Color window and click **OK**.
- 7 Select a starting day for the calendar in the top left corner of the Appointment Scheduler from the **Calendar starting day** box.
- 8 If you want to allow scheduling overrides, select one or more of the following overrides from the **Overrides** box:
 - Overbook limits

Note

If you allow overbook limit overrides, you can schedule appointments even if the overbooking limit has been exceeded. If you want to allow overbooking for select providers, go to [To set up provider & resource hours on page 213](#).

- Closed/unavailable times
- Service warnings
- Insurance warnings

- 9 Select one of the following default scheduling views from the **Default schedule view** box:
 - Daily view
 - Weekly view

- 10 Click **OK**.

► To set up office hours

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Office Hours**.
The **Office Hours** window opens.
- 3 Select the location for which you want to set up office hours from the **Locations** list.
- 4 Select **Closed?** check boxes next to days that the office is closed.

- 5 Select or type the hours that the office is open in the **Open from** and **Open to** text boxes.

The **Office Hours** dialog box contains a list of locations on the left and a table for setting hours on the right.

Closed?	Open from:	Open to:
<input checked="" type="checkbox"/> Sunday	10:00 AM	7:00 PM
<input type="checkbox"/> Monday	8:30 AM	6:00 PM
<input type="checkbox"/> Tuesday	9:00 AM	6:00 PM
<input type="checkbox"/> Wednesday	9:00 AM	6:00 PM
<input type="checkbox"/> Thursday	9:00 AM	9:00 PM
<input type="checkbox"/> Friday	9:00 AM	5:00 PM
<input checked="" type="checkbox"/> Saturday	10:00 AM	7:00 PM

Locations list: Manu's World, Foothill Ranch Store, Trabuco Canyon Store, Willow Knolls, Amy's World, Dave Test, La Jolla, Haller DO NOT USE, Champion Store -1DONOTUSE, Washington Eye Care, Denver Run - store, Los Angeles Store.

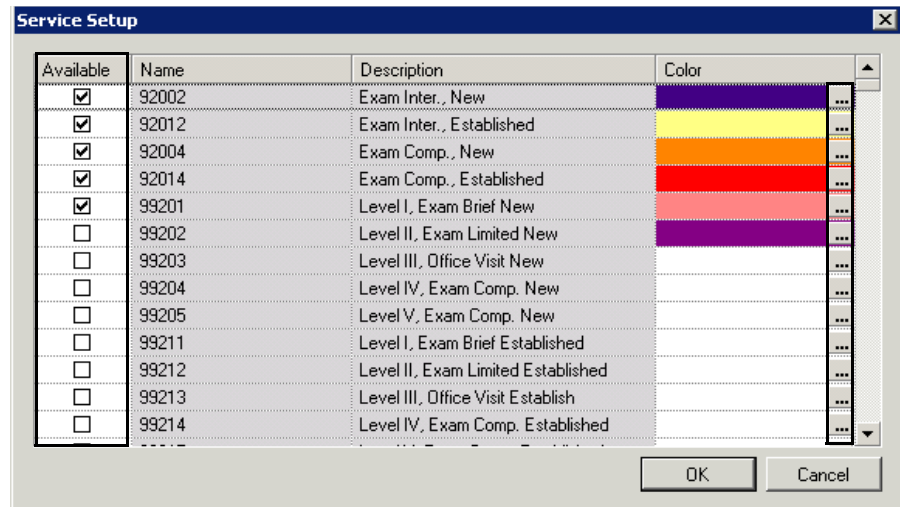
- 6 Click **OK**.

► To set up services

Note

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Services**.
The **Service Setup** window opens.
- 3 Select the check boxes in the **Available** column next to services for which you want to schedule appointments.

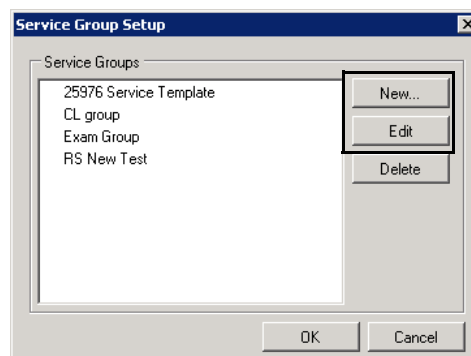
- 4 If you want to select a color to represent a service, click on the ... (ellipse) button next to the service in the Color column, select a color from the Color window, and click **OK**.



- 5 Click **OK**.

► To set up service groups

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Service Groups**.
The **Service Group Setup** window opens.
- 3 Click **New** to create a new service group.
OR
Select a service group from the list and click **Edit** to modify an existing service group.



The **Service Group Detail** window opens.

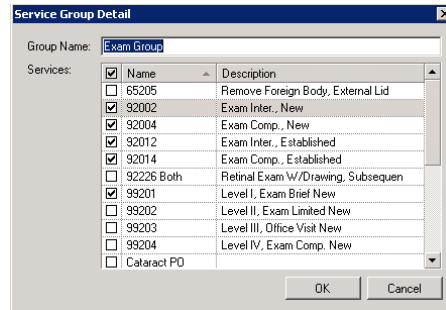
- 4 Type a name for the group in the **Group Name** field.

- 5 Select the check boxes for the services you want to add to the service group.

Notes

- Only services that are available to schedule appear in the Service Group Setup window. For information on making services available, go to [To set up services on page 211](#).
- At least one service must be selected to create a service group.

- 6 Click **OK** to save the service group.



- 7 Click **OK** on the Service Group Setup window when you are finished.

► To set up provider & resource hours

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Providers and Resources**.
The **Resource Setup** window opens.
- 3 Select the **Available** check box next to resources that are available.
- 4 Select the **Allow Overbooks** check box next to resources if you want to allow the Appointment Scheduler to overbook appointments for the resource.
- 5 If you selected the Allow Overbooks check box for a resource, select the maximum number of overbookings that are allowed in each time period for that resource from the **Maximum Overbooks** column.
- 6 Select the number of minutes in which the Appointment Scheduler should increment appointments for the resource from the **Minute Increments** column.

- 7 Select the **Active** check box next to resources that are active.

Available	Resource Name	Allows Overbooks	Maximum Overbooks	Minute Increments	Active
<input type="checkbox"/>	., Admin	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	ABEDI, SHAHALA	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Chapman, Patti	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Clark, Diane	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Cullen, Carlisle	<input checked="" type="checkbox"/>	1	15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	DEMO, DR	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Doctor, Johnny	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Draves, Lyle	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	DrLast, First	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Duck, Donald	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Ediths, Ediths	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Erdmann, Karl	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Farina, Dennis	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Grey, Meredith	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Jessy, More	<input type="checkbox"/>	0	15	<input checked="" type="checkbox"/>

Hours... OK Cancel

- 8 Select a resource and then click **Hours** to set up location hours for the resources.

The **Location Hours** window opens.

- 9 Select a location from the list of **Locations**.

Note

If you are scheduling a provider or resource at more than one location, you must set up the hours for each resource at each location individually.

- 10 Select an available date range from the **Description** drop-down menu.

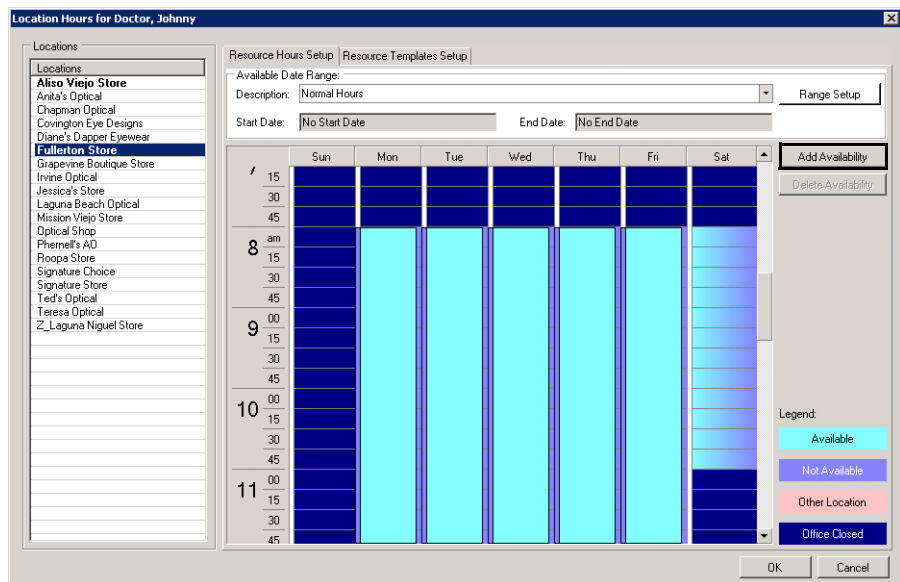
Note

- The default date range is Normal Hours, which is not limited by a beginning date or an ending date.
- Select another date range only for temporary adjustments to the normal schedule such as holiday hours, limited hours due to renovation, etc.
- To add a date range, click **Range Setup**.

- 11 Click and drag your mouse cursor over the day and time that you want to mark the resource as being available and then complete one of the following actions:
 - Right-click the schedule grid and select **Add Availability**.
 - Click the **Add Availability** button.

Notes

- The office must be open during the days and times you select in order to set up location hours and times.
- To delete location hour availability for resources, select the currently available day and time and then either right-click and select **Delete Availability** or click the **Delete Availability** button.



- 12 Click **OK** to close the Location Hours window.
- 13 Click **OK** to close the Resource Setup window.

► To set up service templates

Use appointment templates to restrict the types of services that can be scheduled for a given provider during specific days and times. Templates created for one provider

can be copied to other providers, enabling you to quickly create complex scheduling restrictions or recommendations.

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Service Template Setup**.
The **Service Template Setup** window opens.

Note	You can also open the Service Template Setup window from the Resource Template Setup tab of the Resource Hours window. For information about setting up resource hours, go to To set up provider & resource hours on page 213 .
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- 3 Select a store from the **Location** drop-down menu.
- 4 Select a provider or resource from the **Resource** drop-down menu.

Note	If the provider or resource is not listed in the Resource drop-down menu, ensure the Available check box is selected on the Resource Setup window. For information on setting up providers and resources, go to To set up provider & resource hours on page 213 .
-------------	---

- 5 Select a range from the **Availability Date Range** drop-down menu.
- 6 Click **New** to create a new template.

OR

Select an existing template and click **Edit**.

The **Service Template Detail** window opens.

Note	To copy a template that was set up for another provider or resource, click Copy Template on the Service Template Detail window.
-------------	--

- 7 Type a name in the **Display Name** field.
- 8 Type a description in the **Description** field.
- 9 Click **Service Group** to select the services that may be scheduled during the template hours. For more information about creating service groups, go to [To set up service groups on page 212](#).
- 10 Select the **Restrict Template to Service Group** check box to force appointments scheduled within the time frame of the template to be restricted to only those services included in the selected service group.

Note	If you do not select the Restrict Template to Service Group check box, appointments will not be restricted to only those services included in the service group. The services in the group will appear in bold to indicate that they are recommended when the appointment is being made.
-------------	--

- 11 Under Template Pattern Setup, select the check box next to the days of the week in which the services are available.
- 12 Enter the **Start** time(s).
- 13 Enter the **End** time(s).
- 14 Enter the number of minutes allocated for the service in the **Duration** field.
- 15 Enter the number of minutes between appointment start times in the **Interval** field.

Note

To schedule down time between appointments, enter more minutes in the Interval field than the Duration field.

Service Template Detail

Select Resource Details:

Location: Fullerton Store

Resource: Doctor, Johnny

Available Date Range: Normal Hours

Resource Available Hours:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		

Template Info:

Display Name: Examinations

Description: Exams Only

Service Group: Exams Only

☒ Restrict Template to Service Group

Template Pattern Setup:

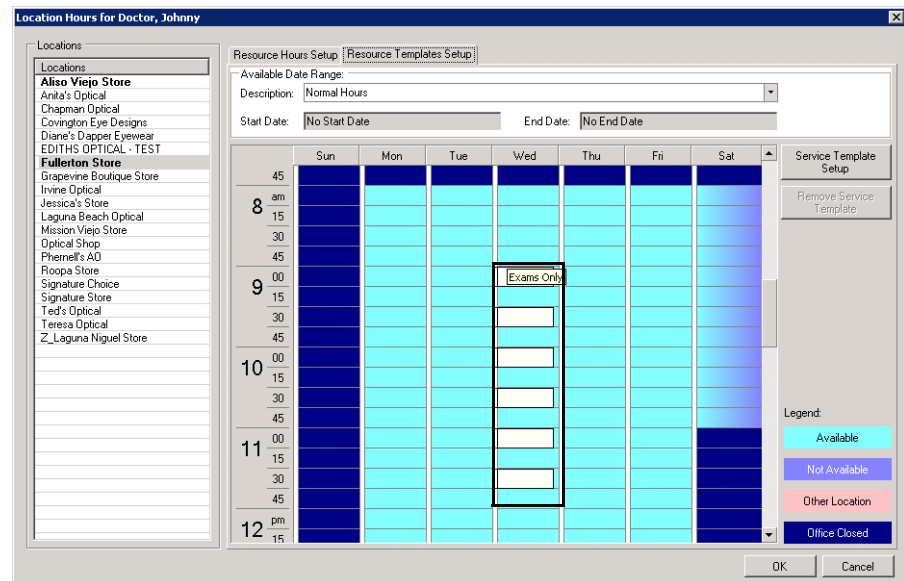
Days of Week	Start Time	End Time	Duration (minutes)	Interval (minutes)
<input type="checkbox"/> All	12:00 AM	12:00 AM	0	0
<input type="checkbox"/> Sunday	12:00 AM	12:00 AM	0	0
<input type="checkbox"/> Monday	12:00 AM	12:00 AM	0	0
<input type="checkbox"/> Tuesday	12:00 AM	12:00 AM	0	0
<input checked="" type="checkbox"/> Wednesday	9:00 AM	12:00 PM	15	30
<input type="checkbox"/> Thursday	12:00 AM	12:00 AM	0	0
<input type="checkbox"/> Friday	12:00 AM	12:00 AM	0	0
<input type="checkbox"/> Saturday	12:00 AM	12:00 AM	0	0

Copy Template OK Cancel

- 16 Click **OK** when you are finished.
- 17 Click **Close** to close the Service Template Setup window.

- 18 When you are finished adding templates, click **Close** on the Template Setup window.

The template(s) you added now appear on the provider or resource's schedule in the Location Hours window.



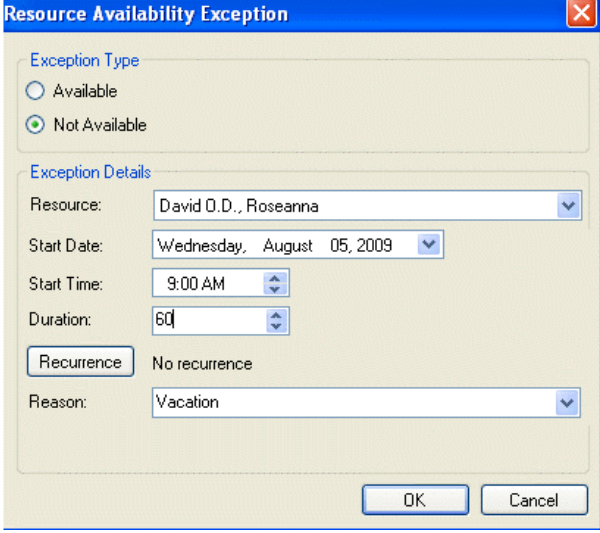
► To set up provider & resource exceptions

Notes

- You must set up resource hours before you set up resource exceptions. To set up resource hours, go to [To set up provider & resource hours on page 213](#).
- If you allow closed and unavailable time overrides, you can schedule appointments even if the office is closed or the provider is unavailable. To allow overrides, go to [To set up preferences on page 209](#).

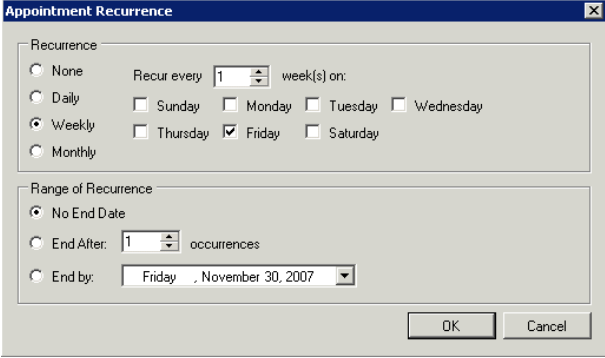
- Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- Click **File** and select **New Schedule Exception**.
OR
Right-click on the time grid and select **New Schedule Exception**.
The **Resource Availability Exception** window opens.
- Select whether the new resource availability exception type denotes time that is **Available** or **Not Available**.
- Select the resource for which you are scheduling the availability exception from the **Resource** drop-down menu.
- Select the starting date of the availability exception from the **Start Date** drop-down menu.

- 6 Select the start time of the availability exception from the **Start Time** box.
- 7 Select or type the duration of the availability exception in the **Duration** text box.



The **Resource Availability Exception** dialog box is shown. It has a blue title bar with a close button. The **Exception Type** section has two radio buttons: **Available** and **Not Available**, with **Not Available** selected. The **Exception Details** section contains a **Resource** dropdown menu set to "David O.D., Roseanna", a **Start Date** dropdown menu set to "Wednesday, August 05, 2009", a **Start Time** spinner set to "9:00 AM", a **Duration** spinner set to "60", a **Recurrence** button, a text box showing "No recurrence", and a **Reason** dropdown menu set to "Vacation". At the bottom right are **OK** and **Cancel** buttons.

- 8 If you want to record a recurrence of this resource availability exception, click **Recurrence** and follow the instructions below; otherwise, go to step 10:
 - a. Select daily, weekly, or monthly recurrence options from the **Recurrence** box.
 - b. Select the range of the recurrence from the **Range of Recurrence** box.
 - c. Click **OK**.



The **Appointment Recurrence** dialog box is shown. It has a blue title bar with a close button. The **Recurrence** section has radio buttons for **None**, **Daily**, **Weekly** (selected), and **Monthly**. To the right of **Weekly** is a "Recur every" spinner set to "1" and "week(s) on:". Below these are checkboxes for days of the week: **Sunday**, **Monday**, **Tuesday**, **Wednesday**, **Thursday**, **Friday** (checked), and **Saturday**. The **Range of Recurrence** section has radio buttons for **No End Date** (selected), **End After**, and **End by**. The **End After** option has a spinner set to "1" and the text "occurrences". The **End by** option has a date dropdown menu set to "Friday, November 30, 2007". At the bottom right are **OK** and **Cancel** buttons.

- 9 Type or select a reason for the resource's exception in the **Reason** text box.
- 10 Click **OK** to save the resource availability exception.

► To set up service reminders

Set up service reminders to restrict scheduling appointments for patients who are scheduling a specific service. If you set up your preferences to allow overrides for service warnings, you will still be able to schedule appointments despite any service

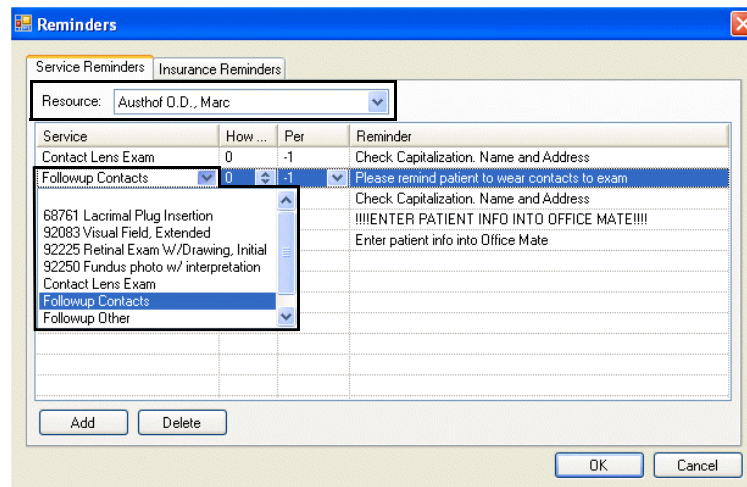
reminders and restrictions. For more information on allowing overrides, go to [To set up preferences on page 209](#).

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Reminders**.
The **Reminders** window opens.
- 3 Select a resource from the **Resource** drop-down menu.

Note

If you want to delete a service reminder, select the service, click **Delete Line**, and click **Yes** on the Delete Warning window.

- 4 Click **Add** to add a service reminder.
- 5 Select a service from the **Service** column drop-down menu.



Note

To add or delete services in OfficeMate, go to [To set up services on page 211](#).

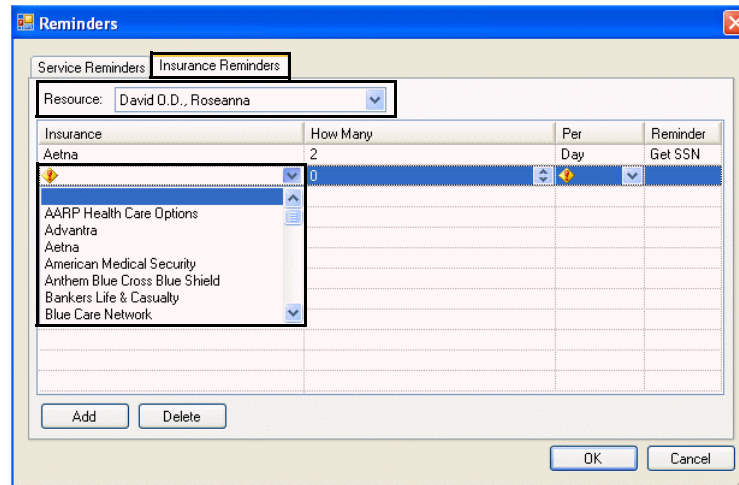
- 6 Select or type the maximum number of times that you want to schedule the service in the **How Many** box.
- 7 Select Week, Day, or Month from the **Per** drop-down menu.
- 8 Type the message that you want to appear in the service reminder in the **Reminder** box.
- 9 Click **OK**.
- 10 Select a resource from the **Resource** drop-down menu.

Note

If you want to delete an insurance reminder, select the insurance plan, click **Delete Line**, and click **Yes** on the Delete Warning window.

- 11 Click **Add** to add an insurance reminder.

- 12 Select an insurance plan from the **Insurance** drop-down menu.



Note

To add insurance plans in OfficeMate, go to [To modify or add appointment schedule resources on page 77](#).

- 13 Select or type the maximum number of times that you want to schedule the insurance plan in the **How Many** box.
- 14 Select Week, Day, or Month from the **Per** drop-down menu.
- 15 Type the message that you want to appear in the insurance reminder in the **Reminder** box.
- 16 Click **OK**.

► To set up insurance reminders

Set up insurance reminders to control the scheduling of appointments for patients who are covered by a specific insurance plan. If you set up your preferences to allow overrides for insurance warnings, you will still be able to schedule appointments despite any insurance reminders and restrictions. For more information on allowing overrides, go to [To set up preferences on page 209](#).

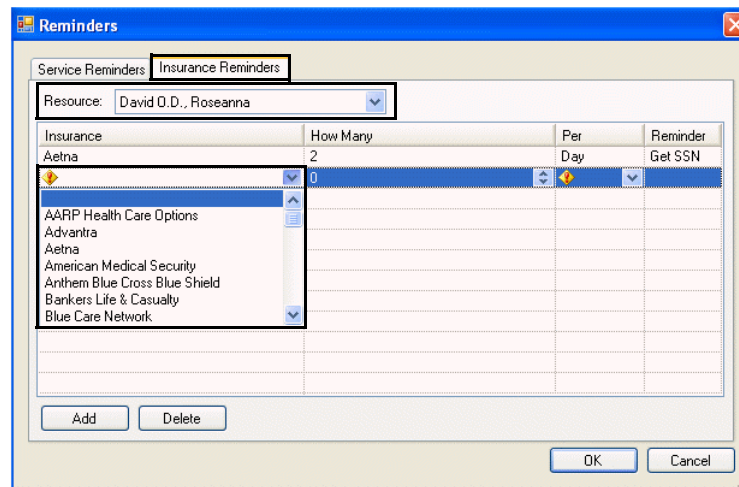
- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Reminders**.
The **Reminders** window opens.
- 3 Click the **Insurance Reminders** tab to set up insurance reminders.
- 4 Select a resource from the **Resource** drop-down menu.

Note

If you want to delete an insurance reminder, select the insurance plan, click **Delete Line**, and click **Yes** on the Delete Warning window.

- 5 Click **Add** to add an insurance reminder.

- 6 Select an insurance plan from the **Insurance** drop-down menu.



Note To add insurance plans in OfficeMate, go to [To modify or add appointment schedule resources on page 77](#).

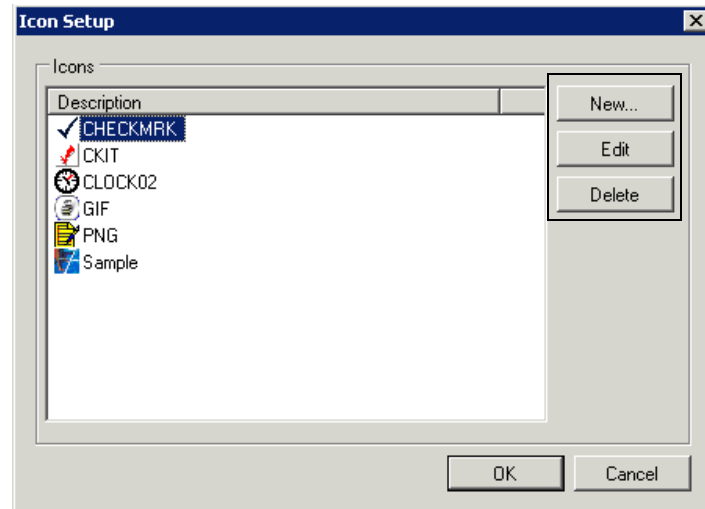
- 7 Select or type the maximum number of times that you want to schedule the insurance plan in the **How Many** box.
- 8 Select Week, Day, or Month from the **Per** drop-down menu.
- 9 Type the message that you want to appear in the insurance reminder in the **Reminder** box.
- 10 Click **OK**.

► To set up appointment icons

You can set up appointment icons to use when you are scheduling patient appointments to denote new or established patients, the status of a patient in the office, patients who need more attention, etc. To assign icons to patient appointments, go to [Scheduling Appointments on page 226](#).

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Appointment Icons**.
The **Icon Setup** window opens.

- 3 Complete one of the following tasks:
 - Click **New**, select an icon from the OfficeMate\Icons folder, and click **OK** to add the icon to your list of available icons to use when scheduling appointments.
 - Select an icon, click **Edit**, and rename the selected icon.
 - Select an icon, click **Delete**, and click **Yes** to delete the icon from your list of available icons to use when scheduling appointments.



- 4 Click **OK** to close the Icon Setup window.

Searching for Appointments

This section tells you how to search for appointments in the Appointment Scheduler, including how

- [To search for an available new appointment time, 223](#)
- [To search for an existing appointment time, 225](#)

► To search for an available new appointment time

- 1 Click **Tools** and select **Open Appointment Search**.

OR

Click the **Find Available** button in the Appointment Scheduler toolbar.

The **Open Appointment Search** window opens.

- 2 Select a resource from the **Resource** drop-down menu.

- 3 Select a service from the **Service** drop-down menu.

OR

Type the number of minutes normally reserved for the appointment for which you are searching in the **Duration** text box.

Note

Your services should be set up with a duration already defined. If you have not set up your services and corresponding durations, go to [To add or modify services on page 250](#).

- 4 If the patient has insurance, select an insurance provider from the **Insurance** drop-down menu.
- 5 Select one or more of the following search criteria:
 - Number of months or weeks until the appointment will be scheduled in the **Appoint in** text box and the **Weeks** or **Months** radio button.
 - Month from the **Month** drop-down menu.
 - Morning, Afternoon, or Evening from the **Period(s)** box.
 - One or more days of the week from the **Day(s) of Week** box.

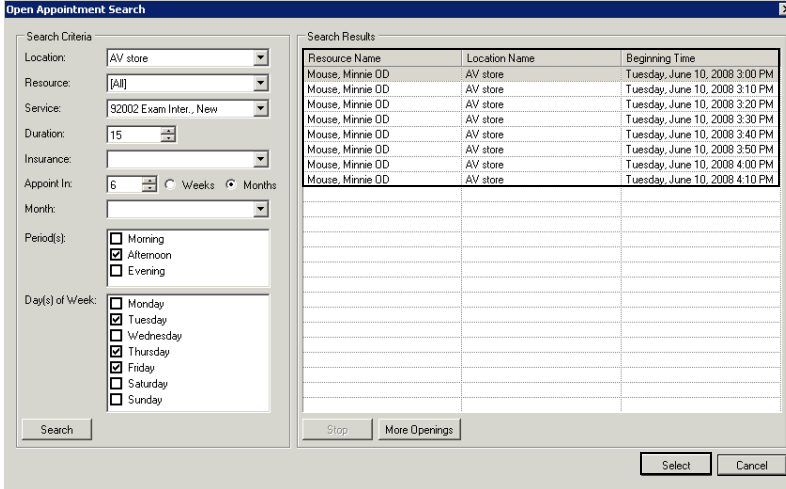
- 6 Click **Search** to search for available appointment times that meet your search criteria.

Note

Click **Stop** to stop the search if you have found an available appointment time that meets your search criteria. To resume your search, or to view additional available appointment times, click **More Openings**.

- 7 Select an available appointment time that meets your search criteria and click **Select** or double-click on it to open the Appointment Detail window and

schedule an appointment in that time slot. For more information on scheduling appointments, go to [Scheduling Appointments on page 226](#).



Open Appointment Search

Search Criteria

Location: AV store

Resource: [All]

Service: 92002 Exam Inter., New

Duration: 15

Insurance:

Appt In: 6 Weeks Months

Month:

Period(s):
☐ Morning
☒ Afternoon
☐ Evening

Day(s) of Week:
☐ Monday
☒ Tuesday
☐ Wednesday
☒ Thursday
☒ Friday
☐ Saturday
☐ Sunday

Search

Search Results

Resource Name	Location Name	Beginning Time
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 3:00 PM
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 3:10 PM
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 3:20 PM
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 3:30 PM
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 3:40 PM
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 3:50 PM
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 4:00 PM
Mouse, Minnie OD	AV store	Tuesday, June 10, 2008 4:10 PM

Stop More Openings

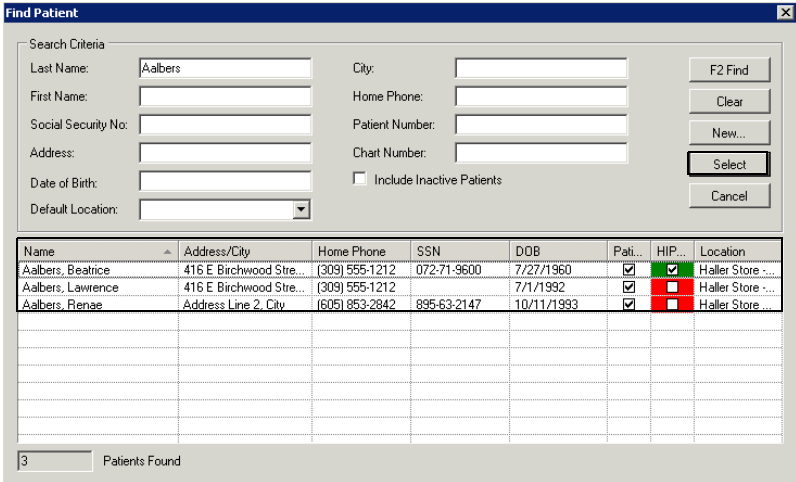
Select Cancel

► To search for an existing appointment time

- 1 Click **Tools** and select **Existing Appointment Search**.

The **Existing Appointment Search** window opens.

- 2 If you want to search for a specific patient's existing appointment, follow the instructions below:
 - a. Click **F2 Find**.
 - b. Enter search criteria in the Find Patient window and click **F2 Find**.
 - c. Select a patient and click **Select** or double-click on the patient.



Find Patient

Search Criteria

Last Name: Aalbers City:

First Name:

Home Phone:

Social Security No:

Patient Number:

Address:

Chart Number:

Date of Birth:

Include Inactive Patients

Default Location:

F2 Find Clear New... Select Cancel

Name	Address/City	Home Phone	SSN	DOB	Pati...	HIP...	Location
Aalbers, Beatrice	416 E Birchwood Stre...	(309) 555-1212	072-71-9600	7/27/1960	✓	✓	Haller Store ...
Aalbers, Lawrence	416 E Birchwood Stre...	(309) 555-1212		7/1/1992	✓	✓	Haller Store ...
Aalbers, Renae	Address Line 2, City	(605) 853-2842	895-63-2147	10/11/1993	✓	✓	Haller Store ...

3 Patients Found

- 3 Select appropriate search criteria from the **Search Criteria** box.

The 'Existing Appointment Search' dialog box is shown. It has a 'Search Criteria' section with the following fields: 'F2 Patient' (selected), 'Aalbers, Beatrice' (text), 'Day(s) of Week' (checkboxes for Monday through Sunday, all checked), 'Location' (dropdown), 'Resource' (dropdown), 'Appointment Date' (date picker), 'Duration' (0 minutes), and 'Include Past Appointments in Search' (unchecked). There are 'Find' and 'Clear' buttons. Below is a 'Search Results' section with a table that has columns: Item, Start Time, Name, Resource, Location, Home Phone, Notes, Cancelled, and Deleted. The table is currently empty.

- 4 Click **Search** to search for existing appointment times that meet your search criteria.
- 5 Select an appointment and click **Edit** to open the Appointment Detail window and edit the existing appointment in that time slot. For more information on modifying appointments, go to [To modify scheduled appointments on page 234](#).

The 'Existing Appointment Search' dialog box is shown with search results. The 'Search Criteria' section is the same as in the previous image. The 'Search Results' table now contains 41 items. The first few rows are as follows:

Item	Start Time	Name	Resource	Location	Home Phone	Notes	Cancelled	Deleted
12/7/2009	1:00 PM	Aalbers, Beatrice	Practitioner, J...	Haller Too	(309) 555-1212	pre app...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4/3/2008	11:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212	every fr...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4/3/2008	11:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212		<input type="checkbox"/>	<input checked="" type="checkbox"/>
4/3/2008	11:25 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3/28/2008	10:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212	every fr...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3/28/2008	10:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3/21/2008	10:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212	every fr...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3/21/2008	10:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3/14/2008	10:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212	every fr...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3/14/2008	10:00 AM	Aalbers, Beatrice	Practitioner, J...	Haller Store...	(309) 555-1212		<input type="checkbox"/>	<input checked="" type="checkbox"/>

At the bottom of the table, it says '41 Items Found'. There are 'Edit...' and 'Close' buttons at the bottom of the dialog box.

Scheduling Appointments

You can schedule, move, change, and cancel appointments for patients using the Appointment Scheduler's Daily, Work Week, and Monthly views. This section tells you how to schedule appointments, including how

- [To schedule a new appointment, 228](#)
- [To modify scheduled appointments, 234](#)

Notes

- You must set up the Appointment Scheduler before you begin scheduling appointments. For more information on setting up the Appointment Scheduler, go to [Setting Up the Appointment Scheduler on page 208](#).
- Click **Refresh** to refresh the Appointment Scheduler with the most up-to-date appointment information.

► To schedule a new appointment

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 To find a patient for whom you want to schedule an appointment, follow the instructions below; otherwise, go to step 3.
 - a. Click **Tools** and select **Search for Patient** or click the **F2 Find** button in the bottom left corner of the Appointment Scheduler to open the Find Patient window.
 - b. Enter search criteria and click **F2 Find**.

Note

If you want to add a new patient to OfficeMate, click **New** and go to [Recording Patient Information on page 190](#) to record the patient's demographic, insurance, and financial information.

- c. Select a patient and click **Select** or double-click on the patient.

Name	Address/City	Home Phone	SSN	DOB	Pati.	HIP	Location
Aalbers, Beatrice	416 E Birchwood Stre...	(309) 555-1212	072-71-9600	7/27/1960	✓	✓	Haller Store ...
Aalbers, Lawrence	416 E Birchwood Stre...	(309) 555-1212		7/1/1992	✓	✓	Haller Store ...
Aalbers, Renae	Address Line 2, City	(605) 853-2842	895-63-2147	10/11/1993	✓	✓	Haller Store ...

Note

After you select a patient, you can click on the following buttons in the bottom left corner of the Appointment Scheduler to complete other patient-related tasks.

- If you want to view, open, or edit other appointments that have been scheduled for the patient, click **Find Appts**, select an appointment, and click **Edit**.
- If you want to edit the patient's demographic information, click **Pat. Demo.** and go to [Recording Patient Information on page 190](#) to record the patient's demographic, insurance, and financial information.
- If you want to clear the patient's information and select another patient, click **Clear Patient**.
- If you want to select another patient, click **F2 Find**.

- 3 Search for and select an available new appointment time. For more information on searching for available appointment times, go to [To search for an available new appointment time on page 223](#)

OR

Click and drag your mouse cursor over an available time slot on the time grid.

Notes

- To quickly advance the Appointment Scheduler to a future month, type the number of months that you want to advance the Appointment Scheduler in the text box next to the **Advance (Months)** button on the toolbar and then click the **Advance (Months)** button.
- You can also advance the Appointment Scheduler by clicking the right arrow in the top right corner of the Appointment Scheduler in the Daily and Work Week views or by clicking the scroll bar on the right side of the Appointment Scheduler in the Monthly view.
- To view today's Appointment Scheduler, click the **Today** button on the Appointment Scheduler toolbar.

- 4 Click **File** or right-click on the schedule and select **Schedule Selected Patient** (if you selected a patient in step 2) or **New Appointment** (if you did not select a patient in step 2).

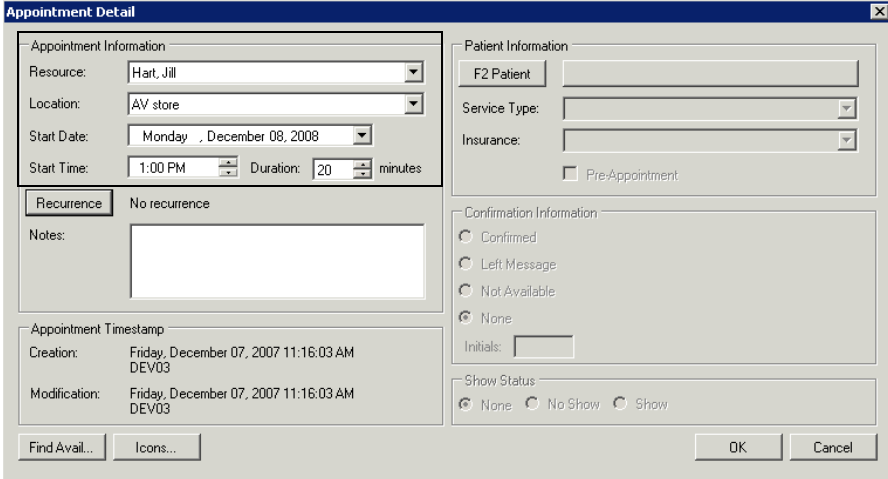
OR

Click the **New** button on the Appointment Scheduler toolbar.

The **Appointment Detail** window opens.

- 5 Select a resource from the **Resource** drop-down menu, if the correct resource is not already selected.
- 6 Type or select a start date for the appointment from the **Start Date** drop-down menu.
- 7 Type or select a starting time for the appointment from the **Start Time** text box.

- 8 Type or select the duration of the appointment (in minutes) in the **Duration** text box.

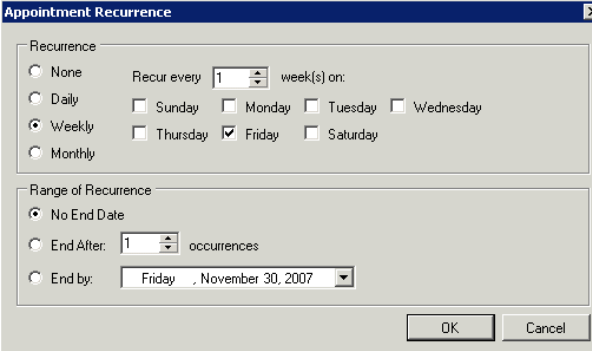


The **Appointment Detail** dialog box is used for scheduling appointments. It contains the following sections:

- Appointment Information:** Includes fields for Resource (Hart, Jill), Location (AV store), Start Date (Monday, December 08, 2008), Start Time (1:00 PM), and Duration (20 minutes).
- Recurrence:** A button labeled **Recurrence** and a text box for **Notes**.
- Appointment Timestamp:** Shows Creation and Modification dates (Friday, December 07, 2007 11:16:03 AM DEV03).
- Patient Information:** Includes F2 Patient, Service Type, Insurance, and a checkbox for Pre-Appointment.
- Confirmation Information:** Radio buttons for Confirmed, Left Message, Not Available, and None (selected). Includes an Initials field.
- Show Status:** Radio buttons for None (selected), No Show, and Show.

Buttons at the bottom include Find Avail..., Icons..., OK, and Cancel.

- 9 If you want to record a recurrence of this appointment, click **Recurrence** and follow the instructions below:
- Select daily, weekly, or monthly recurrence options from the **Recurrence** box.
 - Select the range of the recurrence from the **Range of Recurrence** box.
 - Click **OK**.



The **Appointment Recurrence** dialog box is used to define the recurrence of an appointment. It contains the following sections:

- Recurrence:** Radio buttons for None, Daily, Weekly (selected), and Monthly. Includes a field for "Recur every 1 week(s) on:" and checkboxes for days of the week (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday).
- Range of Recurrence:** Radio buttons for No End Date (selected), End After (1 occurrences), and End by (Friday, November 30, 2007).

Buttons at the bottom include OK and Cancel.

- 10 If you want to add notes to the patient's appointment, type text into the **Notes** text box.

- 11 To find a patient for whom you want to schedule an appointment, follow the instructions below; if you already selected a patient in step 2 above, go to step 13.
 - a. Click **F2 Patient**.
 - b. Enter search criteria and click **F2 Find**.

Note

If you want to add a new patient to OfficeMate, click **New** and go to [Recording Patient Information on page 190](#) to record the patient's demographic, insurance, and financial information.

- c. Select a patient and click **Select** or double-click on the patient.

Find Patient

Search Criteria

Last Name: City:

First Name: Home Phone:

Social Security No.: Patient Number:

Address: Chart Number:

Date of Birth: ☐ Include Inactive Patients

Default Location:

F2 Find **Clear** **New...** **Select** **Cancel**

Name	Address/City	Home Phone	SSN	DOB	Pati...	HIP...	Location
Aalbers, Beatrice	416 E Birchwood Stre...	(309) 555-1212	072-71-9600	7/27/1960	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Haller Store ...
Aalbers, Lawrence	416 E Birchwood Stre...	(309) 555-1212		7/1/1992	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Haller Store ...
Aalbers, Renae	Address Line 2, City	(605) 853-2842	895-63-2147	10/11/1993	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Haller Store ...

3 Patients Found

- 12 Select a service from the **Service Type** drop-down menu.

Note

- To set up the services that you want to schedule, go to [To set up services on page 211](#).
- If not all services are available, a template may be applied to the provider's or resource's schedule that restricts the types of services available. If the service you want to select is not available, choose a different time or a different provider. If you must schedule a service that is unavailable, click the lock icon to select services outside of the prescribed service groups. A username and password with sufficient security access is required for each override.

The screenshot shows the 'Patient Information' form. The 'F2 Patient' tab is selected, and the patient name is 'Patient, Sally'. The 'Service Type' drop-down menu is open, showing a list of services. The 'Insurance' field is set to 'Aetna of California'. The 'Pre-Appointment' checkbox is unchecked.

- Bold services listed in the Service Type drop-down menu are services that are recommended, but not required, by a template or they are services within the prescribed groups while an override is in place.

The screenshot shows the 'Patient Information' form with the 'Service Type' drop-down menu open. The list of services includes: **92004 Exam Comp., New**, **92014 Exam Comp., Established**, **99201 Level II, Exam Brief New**, **Exam of V1.0.39 Exam of V1.0.39**, 65205 Remove Foreign Body, External Lid, 92226 Both Retinal Exam w/Drawing, Subsequen, 99202 Level II, Exam Limited New, and 99203 Level III, Office Visit New. The 'Confirmation Info' section has radio buttons for 'Confirmed', 'Left Message', 'Not Available', and 'None' (selected). The 'Initials' field is empty.

- For information about creating and modifying appointment templates, go to [To set up service templates on page 215](#).

- 13 If the patient has insurance, select the patient's insurance provider from the **Insurance** drop-down menu.

- 14 If you are pre-appointing an appointment, select the **Pre-Appointment** check box.

A **(p)** appears next to the patient's name in the Appointment Scheduler and a check mark appears in the Pre Appt box on the Confirmation tab to notify you that this appointment has been pre-appointed.

The **Appointment Detail** dialog box is divided into several sections:

- Appointment Information:** Includes fields for Resource (Hart, Jill), Location (AV store), Start Date (Wednesday, December 05, 2007), Start Time (9:00 AM), and Duration (30 minutes). There are buttons for Recurrence and No recurrence.
- Notes:** A text area for additional notes.
- Appointment Timestamp:** Shows Creation and Modification dates and times.
- Patient Information:** Includes F2 Patient (Aalbers, Lawrence), Service Type (92002 Exam Inter., New), Insurance (AIA Insurance Inc), and a Pre-Appointment checkbox.
- Confirmation Information:** Includes radio buttons for Confirmed, Left Message, Not Available, and None. There is also an Initials field.
- Show Status:** Includes radio buttons for None, No Show, and Show.

Buttons at the bottom include Find Avail..., Icons..., and OK/Cancel.

- 15 If you did not select an available new appointment time in step 3 above, click **Find Avail** and go to [To search for an available new appointment time on page 223](#) to find and select an available new appointment time.
- 16 If you want to select icons to represent this appointment, click **Icons**, select icons on the Select Icons window, and click **OK**.

Note

To add icons in OfficeMate, go to [To set up appointment icons on page 222](#).

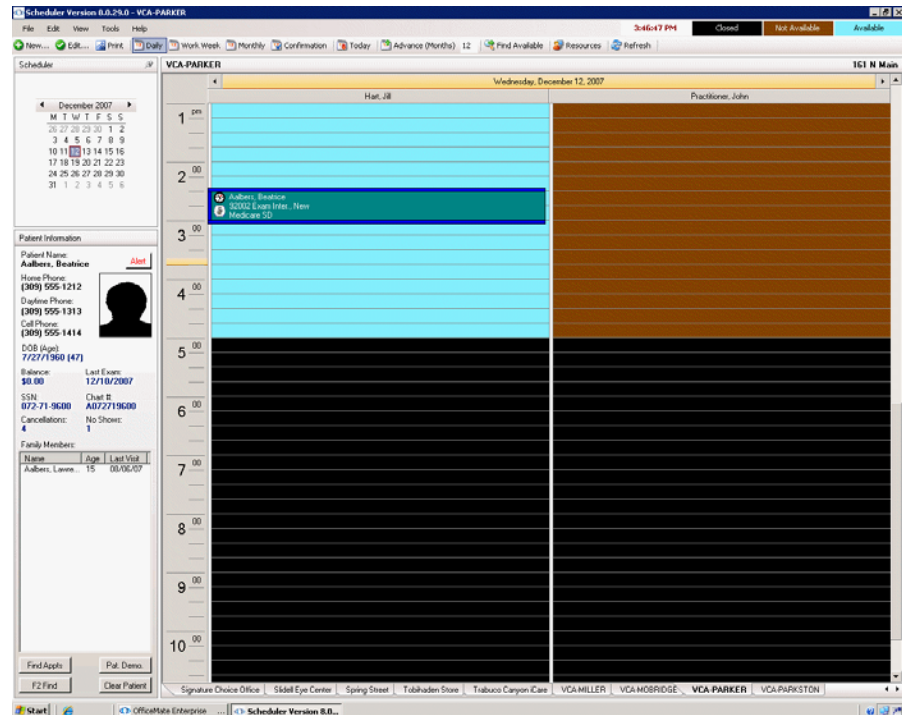
The **Select Icons** dialog box prompts the user to "Select up to three icons for this appointment:". It contains a list of icons with checkboxes:

- ☒ CHECKMRK
- ☒ CKIT
- ☐ CLOCK02
- ☐ GIF
- ☒ PNG
- ☐ Sample

Buttons at the bottom include OK and Cancel.

- 17 Click **OK** to save the new appointment details.

The patient's name appears on the time grid in the Appointment Scheduler and in the OfficeMate Information Center window on the day the appointment is scheduled. If the appointment was scheduled for a patient, it will have a blue border; if it was scheduled for a vendor (no patient was selected), it will have a purple border.



Notes

- After you schedule an appointment, right-click on the appointment in the time grid and then click **Edit** to open the Appointment Details window and view information about the creation and modification of the appointment.
- To schedule an appointment for an existing patient's linked family member, click on an appointment that you have already scheduled in the time grid and then double-click on a family member's name in the Family Members box or right-click on a family member's name and select **Select as Active Patient** in the Family Members box.

► To modify scheduled appointments

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Find an existing appointment. For more information on finding an existing appointment, go to [To search for an existing appointment time on page 225](#).

- 3 Select the existing appointment that you want to edit and complete one of the following tasks:
 - Click **Edit** and select **Edit Selected Item**.
 - Click **Edit** on the Appointment Scheduler toolbar.
 - Right-click on the appointment and select **Edit**.

The **Appointment Details** window opens.
- 4 Edit appointment information using the instructions in steps 5–18 in [To schedule a new appointment on page 228](#).

Recording Patients Shows and No Shows

Note To print a report of all no show appointments, go to [Cancellations And No Shows on page 584](#).

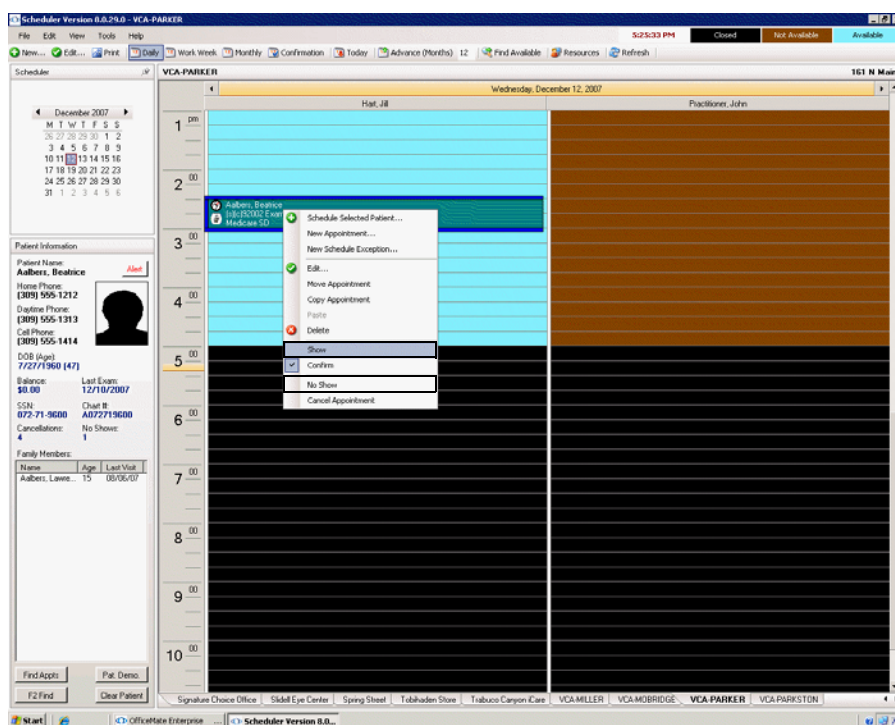
- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Find an existing appointment. For more information on finding an existing appointment, go to [To search for an existing appointment time on page 225](#).

- 3 Select the appointment that you want to denote as an appointment where the patient showed or did not show and complete one of the following tasks:
 - Click **Edit** and select **Show** or **No Show**.
 - Right-click on the appointment and select **Show** or **No Show**.

Note

You can also denote when a patient showed or did not show at his or her appointment by finding and selecting the appointment, right-clicking on the appointment and selecting **Edit**, and selecting appropriate options in the **Show Status** box on the Appointment Detail window.

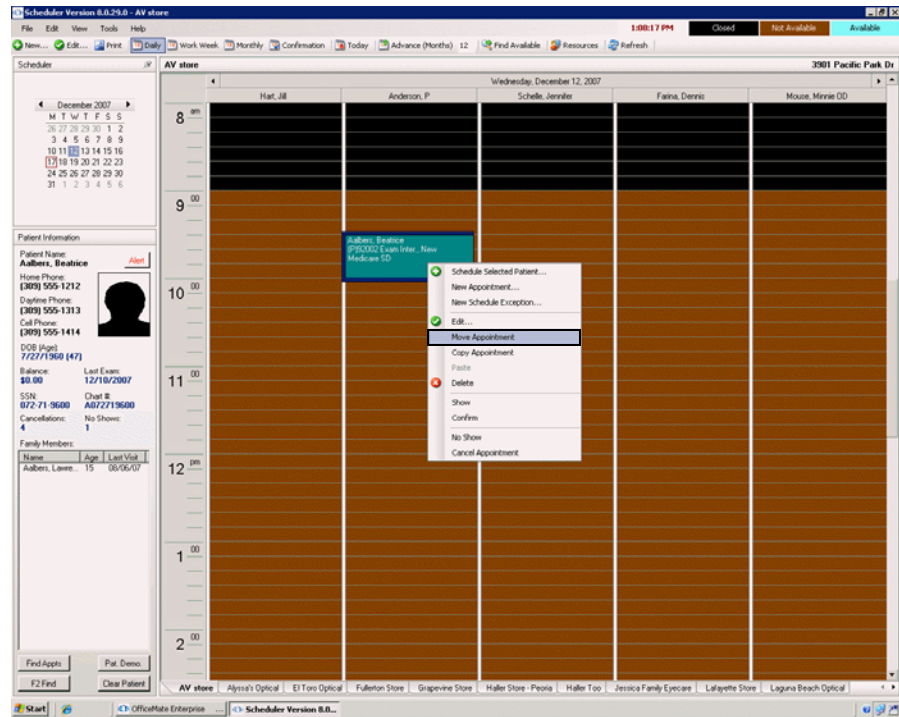
An **(ns)** or **(s)** appears next to the patient's name.



Moving Appointments

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler](#) on page 205.
- 2 Find an existing appointment. For more information on finding an existing appointment, go to [To search for an existing appointment time](#) on page 225.

- 3 Select the appointment that you want to move and complete one of the following tasks:
 - Drag it to a new time in the time grid.
 - Click **Edit** and select **Move Appointment**.
 - Right-click on the appointment and select **Move Appointment**.

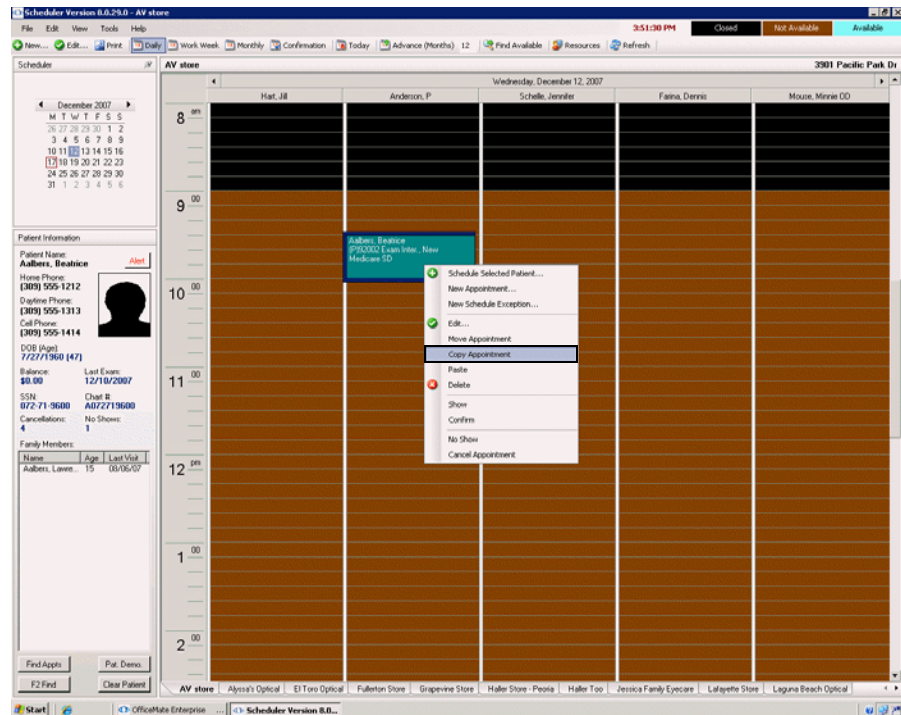


- 4 If you did not drag the appointment to a new time in the time grid, click on a new time in the time grid to move the patient's appointment to the new time and complete one of the following tasks:
 - Click **Edit** and select **Paste**.
 - Right-click on the appointment and select **Paste**.

Copying Appointments

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Find an existing appointment. For more information on finding an existing appointment, go to [To search for an existing appointment time on page 225](#).

- 3 Select the appointment that you want to copy and complete one of the following tasks:
 - Click **Edit** and select **Copy Appointment**.
 - Right-click on the appointment and select **Copy Appointment**.



- 4 Click on a new time in the time grid to which you want to copy the patient's appointment and complete one of the following tasks:
 - Click **Edit** and select **Paste**.
 - Right-click on the appointment and select **Paste**.

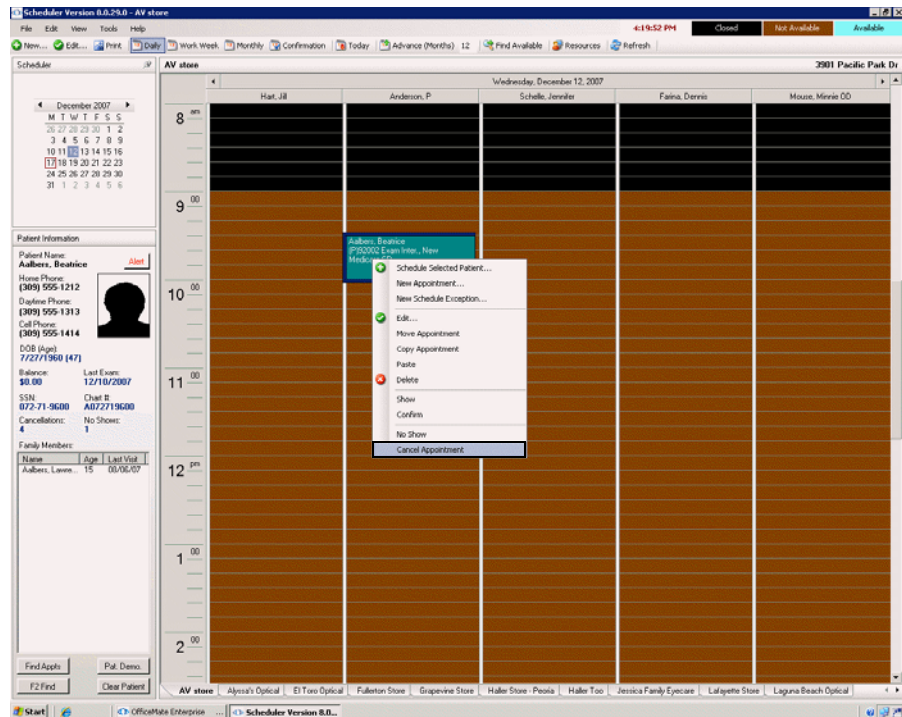
Cancelling Appointments

Note

To print a report of all cancelled appointments, go to [Cancellations And No Shows](#) on page 584.

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler](#) on page 205.
- 2 Find an existing appointment. For more information on finding an existing appointment, go to [To search for an existing appointment time](#) on page 225.

- 3 Select the appointment that you want to cancel and complete one of the following tasks:
 - Click **Edit** and select **Cancel Appointment**.
 - Right-click on the appointment and select **Cancel Appointment**.



- 4 Click **OK** to cancel the appointment.

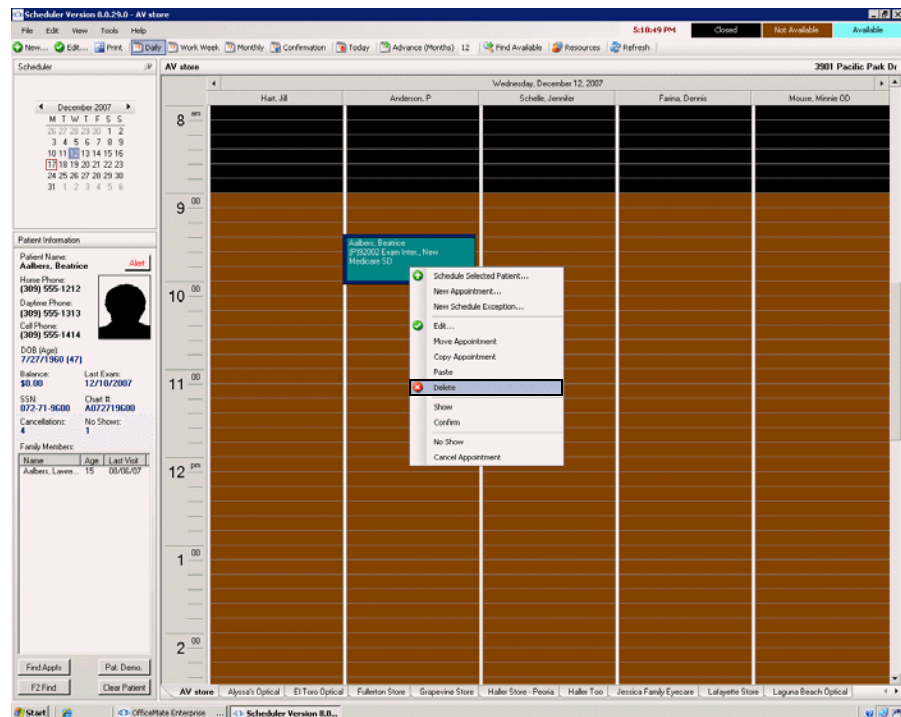
Deleting Appointments

Note

Deleted appointments are *not* tracked in OfficeMate. If you want to track appointments that you are removing from the Appointment Scheduler, to go [Cancelling Appointments on page 238](#).

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Find an existing appointment. For more information on finding an existing appointment, go to [To search for an existing appointment time on page 225](#).

- 3 Select the appointment that you want to delete and complete one of the following tasks:
 - Click **Edit** and select **Delete**.
 - Right-click on the appointment and select **Delete**.



- 4 Click **OK** to delete the appointment.

Confirming Appointments

You can view and print a list of patient appointments that need to be confirmed using the Appointment Scheduler's Confirmation button.

Note

Click **Refresh** to refresh the Appointment Scheduler with the most up-to-date appointment information.

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click the **Confirmation** button on the Appointment Scheduler toolbar.
- 3 Select a location from the tabs at the bottom of the window.
- 4 Select a date from the calendar.

OR

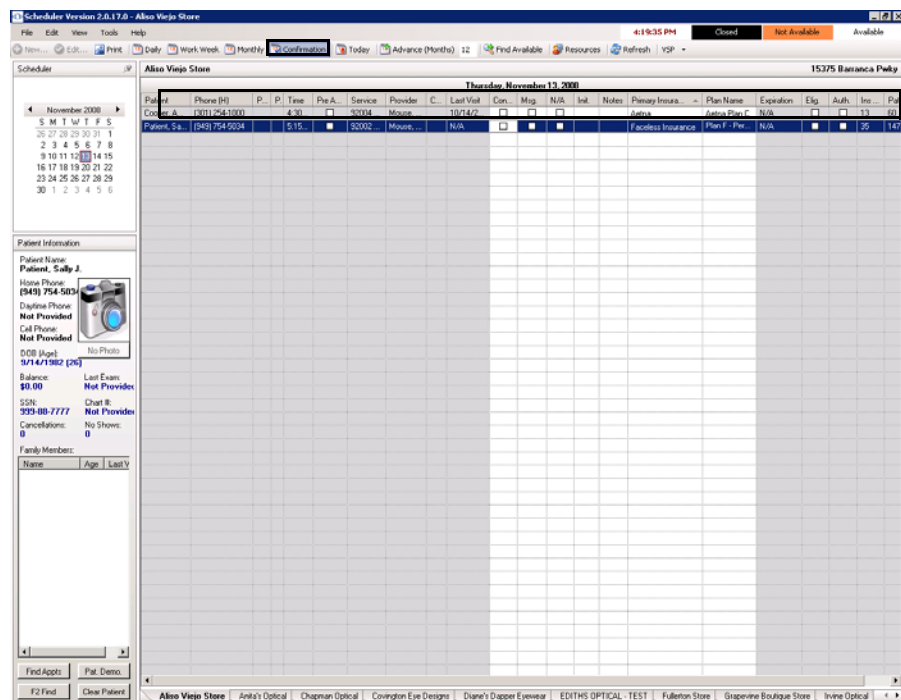
Click the **Today** button on the Appointment Scheduler toolbar to view today's appointment schedule.

- 5 Click the **Print** button on the Appointment Scheduler toolbar to print a list of appointments scheduled for the date that you selected.

Note

If you do not want to print all of the columns displayed in the window, right-click on the confirmation grid and select **Choose Columns**. Then, drag and drop the grey columns from the confirmation grid (for example, Chart No.) into the Columns Not Displayed window.

- 6 Call the patients on the printed list and confirm their appointments.
- 7 Complete one or more of the following tasks:
 - Select the **Confirmed** check box if you confirmed the patient's appointment.
 - Select the **Msg** check box if you left a message for the patient.
 - Select the **N/A** check box if you were unable to confirm the patient's appointment.



- 8 Type your initials in the **Init.** text box.
- 9 Type notes in the **Notes** text box, if necessary.
- 10 To verify a patient's insurance eligibility, double-click the row in which the patient's name appears.

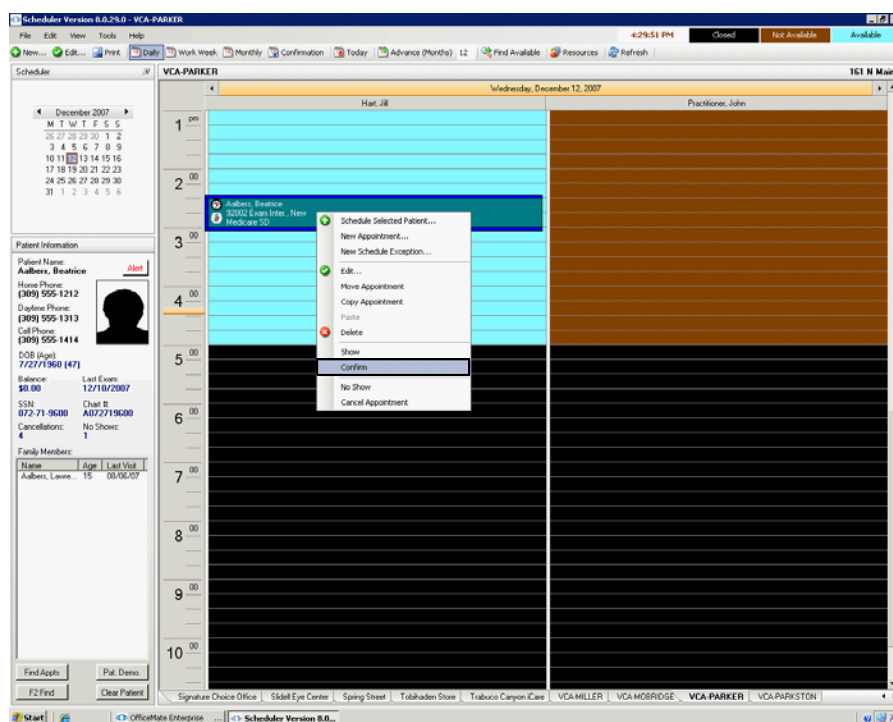
The **Insurance Detail** window opens. If you need to make any changes to the patient's insurance information, go to [To record detailed insurance information on page 198](#). Close the Insurance Detail window when you are finished.

- 11 To denote a patient's appointment as being confirmed, complete the following tasks:
 - a. Find the existing appointment. For more information on finding an existing appointment, go to [To search for an existing appointment time on page 225](#).
 - b. Select the appointment that you want to confirm.
 - c. Click **Edit** and select **Confirm**.
OR
Right-click on the appointment and select **Confirm**.

Note

You can also denote a patient's appointment as being confirmed by finding and selecting the appointment, right-clicking on the appointment and selecting **Edit**, and selecting appropriate options in the **Confirmation Information** box on the Appointment Detail window.

A **(c)** appears next to the patient's name.

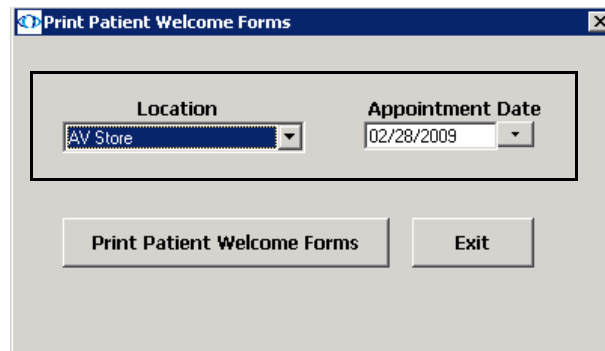


Printing Patient Welcome Forms

The patient welcome form displays basic patient demographic and insurance information. A patient welcome form is printed for each patient with a confirmed appointment on a given day. Follow the instructions below to print patient welcome forms.

Note OfficeMate prints patient welcome forms only for appointments that have been confirmed. For information about confirming appointments, go to [Confirming Appointments on page 240](#).

- 1 Open the Appointment Scheduler. For more information on opening the Appointment Scheduler, go to [Opening & Viewing the Appointment Scheduler on page 205](#).
- 2 Click **Tools** and select **Print Patient Welcome Forms**.
The **Print Patient Welcome Forms** window opens.
- 3 Select your store from the **Location** drop-down menu if it is not selected already.
- 4 Type or select a date in the **Appointment Date** field.



- 5 Click **Print Patient Welcome Forms**.
The **Preview Window** opens.
- 6 Complete one or more of the following tasks:
 - Click the **Print Report** icon to open the Print window and print the patient welcome forms.
 - Click the **Export Report** icon to open the Export window and choose a format and destination for your exported patient welcome forms.

Note If you are exporting the report to a Microsoft Windows application, such as Excel, select the **MS Excel 97-2000 (Data Only)** format and **Disk file** destination in the Export window and click **OK**. Select the **Column width based on objects in the Details** radio button and *all* the check boxes in the Excel Format Options window and click **OK**.

- 7 Close the Preview Window.
- 8 Click **Exit** to close the Print Patient Welcome Forms window.

CHAPTER 8

Recording Receipts & Adjustments

In this chapter:

For more information on receipts and adjustments, see the “OSSU 401 Receipts” iTrain and the OSSU 400-3, “Receiving Patient & Insurance Payments” training course.

- [Opening a Patient’s Receipts & Adjustments, 245](#)
- [Applying Payments to Patient Receivables, 246](#)
- [Applying Insurance Payments to Open Balances, 254](#)
- [Recording Insurance Payments Using Electronic Remittance Advice, 257](#)
- [Recording Insurance Chargebacks, 267](#)
- [Adjusting, Transferring, & Writing Off Charges, 271](#)
- [Modifying Payments Using the Receipt History, 291](#)

After you create and record fee slips you can apply payments from patients and insurance companies, make adjustments to charges, apply credits, and transfer unpaid balances to patients and insurance companies.

Opening a Patient’s Receipts & Adjustments

- 1 Open a patient’s receipts and adjustments using one of the following methods:
 - Click the **Receipts** icon.
 - Click **Tasks** on the main window toolbar and select **Receipts**.
 - Right-click on the Patient Demographic, Hard Lens Order, Soft Lens Order, Eyewear Order, Fee Slip, or Patient Ledger window title bar and select **Receipts**.
 - Right-click on a patient in the OfficeMate Information Center window and select **Receipts**.
 - Click on a patient’s name in the OfficeMate Information Center window and drag and drop the patient on the **Receipts** icon.

- 2 Enter search information in the Patient Last/First name text boxes and click **F2 Find** to find and select a patient.

Notes

- If the patient has been sent to collection, the Collection Warning message appears. You can remove the patient from collection after you record a payment and click **Yes** on the Collection Message window.
- The RFR column and box is color coded to quickly notify you of the patients' identify safeguard information. For more information on the RFR column and box, go to [To record financial information on page 94](#).

Note

Click **Ledger** to open the Patient Ledger window and review the ledger. For more information on reviewing the ledger, go to [Using the Patient Ledger on page 295](#).

Applying Payments to Patient Receivables

This section tells you how to apply payments to patient receivables, including how

- [To apply payments to patient receivables, 246](#)
- [To record prepayments, 248](#)
- [To pay open items with credit amounts, 250](#)

► To apply payments to patient receivables

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Select one of the following payment Method radio buttons:
 - **Check**
 - **Cash**
 - **Other**
- 3 Type the payment amount in the **Amount Paid** text box.
- 4 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying a cash payment, type the cash amount tendered in the **Tendered** text box. The change amount (if applicable) appears in the **Change** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.

- 5 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 6 If you want to apply this payment amount to other family members, select the **All With Same Guarantor** check box to view information on all of the guarantor's family members.

Notes

- The payment will be recorded on the patient's receipt history.
- To automatically select the All With Same Guarantor check box, select the **Yes** radio button next to the Default All Same Guarantor other system preference. For more information on modifying other system preferences, go to [To define and change other preferences on page 69](#).

- 7 Apply the amount in the Total to Apply text box using one of the following methods:
 - Click **Apply to Oldest** to apply the amount to the oldest item.
 - Click in an item's **Payment** text box to apply the amount to a specific item.

Notes

- The amount is applied to the item as soon as you click in the item's Payment text box.
- Typing a partial payment amount in the Payment text box will display an amount in the Balance box next to the item. The next time you open the Receipts & Adjustments window for this patient, this item's remaining balance and any new fee slip charges are displayed.

Receipts & Adjustments Patient: Sally Carter [ALERT] DOB: 10/08/1956

Apply to Patient Receivable | Apply to Insurance | Open CD\$\$

Patient Last/First: Carter | Sally | F2 Find | Date: 02/10/2005 | Receipt No: 0

Method: ☒ Check ☐ Cash ☐ Other | Amount Paid: \$10.00 | Type: | Unapplied: \$110.00

Amount Applied: \$10.00 | Check #: 1256 | All With Same Guarantor: ☐ | Apply to Oldest

Refunded Amount: \$0.00 | Bank #: 258926 | To Apply: \$0.00

Total to Apply: \$0.00 | Recorded By: Franklin, Helen

Date	Slip #	Patient	Code/Name	Open	Payment	Balance	Refund
01/20/2005	83	Sally Carter	Test	10.00	10.00	.00	
				Totals	10.00	10.00	.00

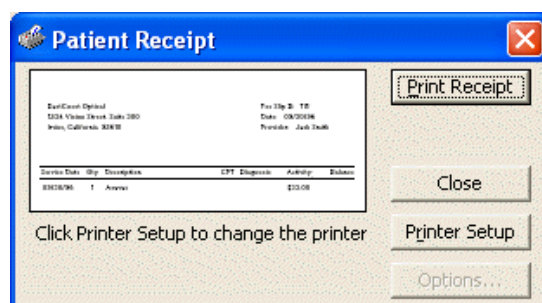
History | Delete | Record | Print | Cancel | New | Adj | Ledger

- 8 If you want to adjust a charge, go to [Adjusting, Transferring, & Writing Off Charges on page 271](#).
- 9 Click **Print** if you want to print the list of patient receivables.

- 10 Click **Record** and follow the instructions below to record the payment and print a receipt.
 - Click **Print Receipt** to print a receipt.
 - Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).
 - Click **Close** to close the Patient Receipt window.

Note

After you record a payment, the payment is assigned a receipt number. To view and change payments, click **History**. For more information on viewing and changing payments, go to [Modifying Payments Using the Receipt History on page 291](#).



► To record prepayments

A prepayment results in a credit (or unapplied payment) on the patient's account.

Note

- To use all or part of the prepayment credit to pay open charges, go to [To pay open items with credit amounts on page 250](#).
- To automatically apply unapplied patient amounts from fee slips to new fee slip charges in the Fee Slip window, select the **Yes** radio button next to the Apply patient unapplied amount from fee slip other system preference. For more information on modifying other system preferences, go to [To define and change other preferences on page 69](#).

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Select one of the following payment Method radio buttons:
 - **Check**
 - **Cash**
 - **Other**
- 3 Type the payment amount in the **Amount Paid** text box.

- 4 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying a cash payment, type the cash amount tendered in the **Tendered** text box. The change amount (if applicable) appears in the **Change** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.

Receipts & Adjustments Patient: Sally Carter [ALERT] DOB: 10/08/1956

Apply to Patient Receivable | Apply to Insurance | Open CD\$\$\$

Patient Last/First: Carter | Sally | F2 Find | Date: 02/10/2005

Method: ☒ Check ☐ Cash ☐ Other | Receipt No: 0

Amount Paid: \$10.00 | Type: | Unapplied: \$110.00

Amount Applied: \$10.00 | Check #: 1256 | All With Same Guarantor: ☐ | Apply to Oldest: ☒

Refunded Amount: \$0.00 | Bank #: 258926 | To Apply: \$0.00

Total to Apply: \$0.00 | Recorded By: Franklin, Helen

Date	Slip #	Patient	Code/Name	Open	Payment	Balance	Refund
01/20/2005	83	Sally Carter	Test	10.00	10.00	.00	
				Totals	10.00	10.00	.00

History | Delete | Record | Print | Cancel | New | Adj | Ledger

- 5 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 6 Click **Print** if you want to print the list of patient receivables.

- 7 Click **Record** and follow the instructions below to record the payment and print a receipt.

Note

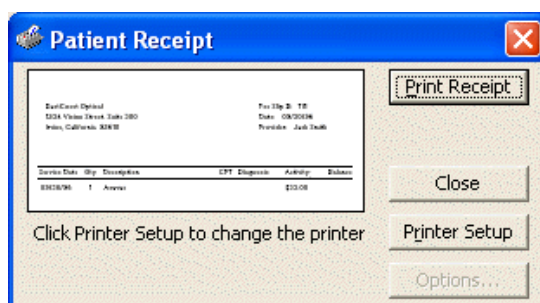
If you applied a partial payment amount, the **Receipts Payment Warning** window opens. Click **Yes** to create a patient credit or click **No** to apply the payment to a fee slip.

- Click **Print Receipt** to print a receipt.
- Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).
- Click **Close** to close the Patient Receipt window.

The prepayment is displayed in the Credit box in the Patient Ledger window and in the Unapplied box in the Receipts & Adjustments window.

Notes

- After you record a payment, the payment is assigned a receipt number. To view and change payments, click **History**. For more information on viewing and changing payments, go to [Modifying Payments Using the Receipt History on page 291](#).
- View the prepayment in the Receipt History window and on the Patient Receipt History tab in the Patient Ledger window.



► To pay open items with credit amounts

Note

To automatically apply unapplied patient amounts from fee slips to new fee slip charges in the Fee Slip window, select the **Yes** radio button next to the Apply patient unapplied amount from fee slip other system preference. For more information on modifying other system preferences, go to [To define and change other preferences on page 69](#).

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click **History**.

The **Receipt History** window opens.

- 3 Select a receipt with an unapplied balance and click **Select**.

Rec. No	Date	Amount	Check #	Type	Unapplied	Refunded
93	02/10/2005	30.00		Check	.00	.00
92	01/19/2005	100.00		Cash	100.00	.00
91	01/19/2005	10.00		Cash	10.00	.00
90	01/17/2005	10.00		Cash	.00	.00
87	01/17/2005	100.00		Cash	.00	.00
86	01/14/2005	10.00		Cash	.00	10.00
69	02/12/2002	75.00		Cash	.00	.00

The **Receipts & Adjustments** window is populated with information from the unapplied balance.

- 4 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 5 If you want to apply this payment amount to other family members, select the **All With Same Guarantor** check box to view information on all of the guarantor's family members.

Notes

- The payment will be recorded on the patient's receipt history.
- To automatically select the All With Same Guarantor check box, select the **Yes** radio button next to the Default All Same Guarantor other system preference. For more information on modifying other system preferences, go to [To define and change other preferences on page 69](#).

- 6 Apply the amount in the Total to Apply text box using one of the following methods:
- Click **Apply to Oldest** to apply the amount to the oldest item.
 - Click in an item's **Payment** text box to apply the amount to a specific item.

Note

Typing a partial payment amount in the Payment text box will display an amount in the Balance box next to the item. The next time you open the Receipts & Adjustments window for this patient, this item's remaining balance and any new fee slip charges are displayed.

Receipts & Adjustments Patient: Sally Carter [ALERT] DOB: 10/08/1956

Apply to Patient Receivable | Apply to Insurance | Open CD\$\$\$

Patient Last/First: Carter | Sally | F2 Find | Date: 02/10/2005

Method: ☒ Check ☐ Cash ☐ Other | Receipt No: 0

Amount Paid: \$10.00 | Type: | Unapplied: \$110.00

Amount Applied: \$10.00 | Check #: 1256 | All With Same Guarantor: ☐ | Apply to Oldest

Refunded Amount: \$0.00 | Bank #: 258926 | To Apply: \$0.00

Total to Apply: \$0.00 | Recorded By: Franklin, Helen

Date	Slip #	Patient	Code/Name	Open	Payment	Balance	Refund
01/20/2005	83	Sally Carter	Test	10.00	10.00	.00	
				Totals	10.00	10.00	.00

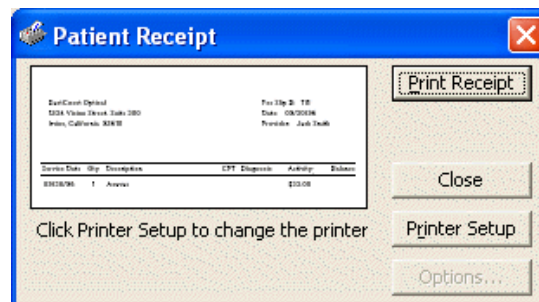
History | Delete | Record | Print | Cancel | New | Adj | Ledger

- 7 If you want to adjust a charge, go to [Adjusting, Transferring, & Writing Off Charges on page 271](#).
- 8 Click **Print** if you want to print the list of patient receivables.

- 9 Click **Record** and follow the instructions below to record the payment and print a receipt.
 - Click **Print Receipt** to print a receipt.
 - Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).
 - Click **Close** to close the Patient Receipt window.

Notes

- The amount in the Unapplied box is updated after you refresh the Receipts & Adjustments window.
- After you record a payment, the payment is assigned a receipt number. To view and change payments, click **History**. For more information on viewing and changing payments, go to [Modifying Payments Using the Receipt History on page 291](#).



Applying Insurance Payments to Open Balances

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.
- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Summary View** or **Display Detail View**.

Notes

- If you view the insurance charges in the summary view, you can post payments by patient total balances.
- If you view the insurance charges in the detail view, you can post payments by line item.

- 6 Select one of the following payment Method radio buttons:
 - **Check**
 - **Other**
- 7 Type the payment amount in the **Amount Paid** text box.
- 8 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.
- 9 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).

- 10 Click in an item's **Payment** text box and type the payment amount to apply the amount to a specific item.

Notes

- Typing a partial payment amount in the Payment text box will display an amount in the Balance box next to the item. If you only record a partial payment, you can post the remainder of the insurance payment at a later time.
- Click **Adj** to transfer the balance to another insurance company or patient, adjust the amount, or write off the balance. For more information on adjustments, go to [Adjusting, Transferring, & Writing Off Charges on page 271](#).

Receipts & Adjustments Patient: Sally Carter [ALERT] DOB: 10/08/1956

Apply to Patient Receivable **Apply to Insurance**

Insurance: Vision Service Plan
 Service Date Range: 05/11/2005 to 05/11/2006 Display Charges
 Amount Paid: \$20.00 Method: ☒ Check ☐ Other
 Amount Applied: \$20.00 Type:
 Amount Transf'd: \$0.00 Check #: 5465
 To Apply: \$0.00 Bank #: 4558256

Date: 05/11/2006
 Receipt No: 28
 Unapplied: \$35.00
 Ins. ChargeBack
 Recorded By: Franklin, Helen

Ref #	Patient Name	Open Charges	Payments	Balance	Transf'd
-	Carter, Sally	92.96	20.00	72.96	

Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
03/24/2006	Carter, Sally	V2520	1	Multipack Acuvue	30.00	20.00	10.00
03/20/2006	Carter, Sally	V2020	1	IRLOCK 760/1	62.96	0.00	62.96

Totals 92.96 20.00 72.96 .00

History Delete Global Adjustment Record Print Cancel New Adj

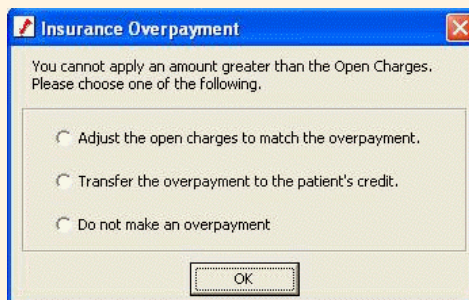
- 11 If you want to adjust a charge, go to [Adjusting, Transferring, & Writing Off Charges on page 271](#).
- 12 Click **Print** if you want to print the list of patient insurance receivables.

- 13 Click **Record** and follow the instructions below to record the payment and print a receipt.

Note

If you try to record a payment on a line item in the detailed view that is higher than the open charges, the Insurance Overpayment window opens. Choose to adjust the open charges to match the overpayment amount, transfer the over payment to the patient's credit, or not make the overpayment.

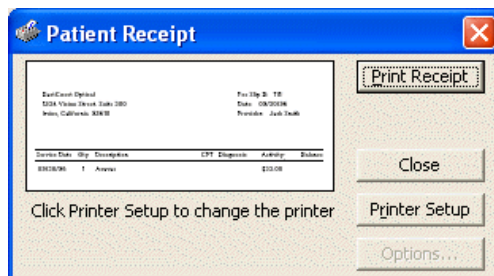
- If you adjust the open charges to match the overpayment amount, OfficeMate automatically increases the balance to match the overpayment. The amount in the Patient's Ledger will display "(ADJ)" next to it.
- If you transfer the overpayment to the patient's credit, the correct amount is credited to the line item and the overpayment is transferred to the patient.
- If you do not make an overpayment, the payment will automatically be corrected to be the same amount as the open charges.



- Click **Print Receipt** to print a receipt.
- Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).
- Click **Close** to close the Patient Receipt window.

Note

After you record a payment, the payment is assigned a receipt number. To view and change payments, click **History**. For more information on viewing and changing payments, go to [Modifying Payments Using the Receipt History on page 291](#).



Recording Insurance Payments Using Electronic Remittance Advice

Using the ERA, an insurance check that used to take hours to record and balance will now only take you about thirty minutes or less!

The Electronic Remittance Advice (ERA) feature saves time and improves the accuracy of your billing records by automatically adjudicating payments, overpayments, underpayments, write-offs, lab chargebacks, patient transfers, and secondary insurance transfers.

This section tells you how to apply payments to insurance receivables through ERA, including how

- To open the Insurance Remittance Advice Entry window, 257
- To review the ERA information, 259
- To resolve nonexistent line items, 263
- To resolve overpayments, 264
- To resolve lab chargeback entries, 265
- To resolve irreconcilable entries, 267

► To open the Insurance Remittance Advice Entry window

- 1 Click the **Receipts** icon and select **ERA**.

OR

Click **Tasks** on the main window toolbar, select **Receipts**, and select **ERA**.

The **Insurance Remittance Advice Entry** window opens.

- 2 Click **Load ERA File**.

OfficeMate looks for available batch claim payments located in the OfficeMate\DATA\EMC\ERA folder and displays the available claim payments in the **Select Remittance File** window.

Date	Provider	Insurance	Claims	Payment
11/19/2008	EYE ASSOCIATES	DC BCBS/CAREFIRST	14	\$1,380.53
12/09/2008	EYE ASSOCIATES	VA MEDICARE/TRAILBLAZE...	371	\$37,574.98

- 3 Select a batch to process and click **OK**.

Notes

- You can select only one batch to process at a time.
- OfficeMate displays only those batches that have not been processed.

OfficeMate analyzes the ERA file and matches the claims in the file to claims in OfficeMate.

- 4 Review any error messages that appear and perform the following steps:

- a. Click **Yes** to search for the patient.

The **Find Patient** window opens.

- b. Select the patient from the results list and click **Select**.

Note

If you choose to not search for the patient, or if the patient cannot be found in the Find Patient window, you can locate the patient after adjudicating the payments for patients that can be found. For information on processing the patients that could not be found, go to [To resolve irreconcilable entries on page 267](#).

The Insurance Remittance Advice Entry window populates with information about the payment and lists all of the patients and claims covered in the payment.

Insurance: VSP Load ERA File Date: 12/02/2008

Amount Paid: \$716.45 Interest Paid: \$0.00 Provider Adjustment: \$0.00 Method: ☒ Check ☐ EFT Check #: 02629646 Bank #: Unapplied: Location: (All) Recorded By: Doctor, Johnny

To Apply: \$0.00 Skipped: \$96.45 Applied: \$620.00 Undo No Detail All Detail Unchecked Detail

S	Pat #	Fee Slip	Ref #	Patient Name	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	To Pat	To Sec	Balance	
<input checked="" type="checkbox"/>	P	25	27	1732485900	BCSENPXTL, MZOO	883.95	0.00	863.95	120.00	0.00	0.00	120.00	743.95	0.00	0.00	
				Service Date	CPT	Units	Description	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	
				01/15/09	V2020	1	Buddy	133.95	0.00	133.95	0.00	0.00	0.00	0.00	133.95	0.00
				01/15/09	92311	1	92311	350.00	0.00	350.00	120.00	0.00	0.00	120.00	230.00	0.00
				01/15/09	V2520	1	Focus Dailies	190.00	0.00	170.00	0.00	0.00	0.00	0.00	170.00	0.00
				01/15/09	V2520	1	Focus Dailies	190.00	0.00	190.00	0.00	0.00	0.00	0.00	190.00	0.00
				01/15/09	V2756	1	Eyeglass Case	20.00	0.00	20.00	0.00	0.00	0.00	0.00	20.00	0.00
<input checked="" type="checkbox"/>	P	21	14	1732485500	BMGBSP, KPSHF	455.00	0.00	435.00	130.00	0.00	0.00	130.00	305.00	0.00	0.00	
				Service Date	CPT	Units	Description	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	
				01/14/09	99213	1	99213	75.00	0.00	75.00	0.00	0.00	0.00	0.00	75.00	0.00
				01/14/09	V2520	1	Acuvue Oasys for Astigmatism	190.00	0.00	170.00	0.00	0.00	0.00	0.00	170.00	0.00
				01/14/09	V2520	1	Acuvue Oasys for Astigmatism	190.00	0.00	190.00	130.00	0.00	0.00	130.00	60.00	0.00
<input checked="" type="checkbox"/>	P	27	17	1732486100	CFEXFMM, NB3PO	765.00	0.00	745.00	120.00	0.00	0.00	120.00	625.00	0.00	0.00	
				Service Date	CPT	Units	Description	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	
				01/15/09	99213	1	99213	75.00	0.00	75.00	0.00	0.00	0.00	0.00	75.00	0.00
				01/15/09	V2750	1	AR Coating (TwinCity)	90.00	0.00	90.00	0.00	0.00	0.00	0.00	90.00	0.00

Print Adj Reason Other Ins Record Cancel

- 5 Review the information displayed in the Insurance Remittance Advice Entry window. For more information on Reviewing the ERA information go to [To review the ERA information on page 259](#).

The claims with green check marks are fully adjudicated. The claims without check marks could not be matched to items on fee slips and require manual intervention. The line items that require attention are bold, and the text of the line items are different colors, depending on the nature of the mismatch.

6 Resolve any line items in bold text.

Notes

- For information on resolving line items, go to the appropriate section for more information:

For this type of line item	Refer to this section
Red, bold text	To resolve nonexistent line items on page 263
Black, bold text	To resolve overpayments on page 264
Green, bold text	To resolve lab chargeback entries on page 265
Red, bold text	To resolve lab chargeback entries on page 265

- Although nonexistent line items and lab chargebacks both appear in red, bold text, you can easily tell the difference between the two. The nonexistent line items will have a product listed in the Description column, while lab chargebacks have Lab Chargeback listed in as the description.

► To review the ERA information

- 1 Open the Insurance Remittance Advice Entry window and load an ERA file. For information on opening the Insurance Remittance Advice Entry window and loading an ERA file, go to [To open the Insurance Remittance Advice Entry window on page 257](#).

The Insurance Remittance Advice Entry window populates with information about the payment in the upper portion of the window and lists all of the patients and claims covered in the payment in the lower portion of the window.

- 2 Click the following buttons, as needed:
 - Click **No Detail** to view only the header of each claim, which gives a summary of each claim as a single line. You cannot edit or adjudicate claims within the header row.
 - Click **All Detail** to view the detail of each claim by showing all of the line items.
 - Click **Unchecked Detail** to view the detailed line items for only those claims that require your attention. Claims that do not require your attention will display only the header row.

3 Review the information in the header rows.

Note

Use the following table to understand the information displayed in the header rows and where the information comes from:

This column	Displays this information														
check box	Indicates whether the claim was automatically adjudicated. A green check mark indicates that the claim was fully adjudicated. If the check box does not have a green check mark, one or more items in the claim require your attention.														
S	Displays the status of the claim. Refer to the following table to determine the status of the claim.														
<table> <tr> <th>Status</th><th>Meaning</th></tr> <tr> <td>P</td><td>Primary</td></tr> <tr> <td>PX</td><td>Primary crossover</td></tr> <tr> <td>S</td><td>Secondary</td></tr> <tr> <td>I</td><td>Informational</td></tr> <tr> <td>R</td><td>Reversal</td></tr> <tr> <td>D</td><td>Denied</td></tr> </table>		Status	Meaning	P	Primary	PX	Primary crossover	S	Secondary	I	Informational	R	Reversal	D	Denied
Status	Meaning														
P	Primary														
PX	Primary crossover														
S	Secondary														
I	Informational														
R	Reversal														
D	Denied														
Pat #	Displays the patient number from OfficeMate.														
Fee Slip	Displays the fee slip number associated with the claim.														
Ref #	Displays the reference number assigned to the claim by the clearinghouse.														
Patient Name	Displays the patient's name.														
Billed	Displays the amount billed on the claim in OfficeMate.														
PatPaid	Displays the amount the patient paid, as recorded in OfficeMate.														
Open	Displays the open charges for the claim, as recorded in OfficeMate.														

Note, cont.	This column	Displays this information
	Allowed	Displays the amount covered by insurance according to the ERA.
	Patient	Displays the amount for which the patient is responsible.
	SecInsur	Displays the amount for which the secondary insurance is responsible (crossover)
	Payment	Displays the insurance payment from the ERA. This field can be edited.
	Adjust	Displays the amount of any adjustments that are made to reconcile the payment to the amount billed on the fee slip. this field can be edited.
	To Pat	Displays the amount that is assigned to the patient according to the ERA. This field can be edited.
	To Sec	Displays the amount that is assigned to the secondary insurance. This field can be edited.
	Balance	Displays any amount that is not covered under the Adjust, To Pat, and To Sec amounts.

4 Review the information in the claim detail rows.

Note

Use the following table to understand the information displayed in the detail rows and where the information comes from:

This column	Displays this information
Service Date	Displays the service date recorded on the fee slip.
CPT	Displays the CPT code either from the fee slip or, if the line is a nonexistent item, from the ERA file.
Units	Displays the number of items billed with that row's CPT code.
Description	Displays the product description from the fee slip.
Billed	Displays the amount billed on the claim in OfficeMate.
PatPaid	Displays the amount the patient paid, as recorded in OfficeMate.
Open	Displays the open charges for the claim, as recorded in OfficeMate.
Allowed	Displays the amount covered by insurance according to the ERA.
Patient	Displays the amount for which the patient is responsible.
SecInsur	Displays the amount for which the secondary insurance is responsible (crossover)
Payment	Displays the insurance payment from the ERA. This field can be edited.
Adjust	Displays the amount of any adjustments that are made to reconcile the payment to the amount billed on the fee slip. this field can be edited.
To Pat	Displays the amount that is assigned to the patient according to the ERA. This field can be edited.
To Sec	Displays the amount that is assigned to the secondary insurance. This field can be edited.
Balance	Displays any amount that is not covered under the Adjust, To Pat, and To Sec amounts.

- 5 Click the button at the far right of the detail rows to view additional details and remarks for individual line items.

Detail for V2220			
Fee	\$190.00	Adjustments	Amount Reason
Allowed Amt.	\$0.00	Contractual	\$0.00
Deductible	\$0.00	Pat. Responsibility	\$0.00
CoIns. Amount	\$0.00	Correct/Reversal	\$0.00
CoPay Amount	\$0.00	Payor Initiated	\$190.00 PI42
Open Amounts		Remarks:	3W
Patient	\$0.00	Secondary:	
Insurance	\$190.00		
Total	\$190.00		

- 6 Resolve line items that are in bold text. For information on resolving nonexistent line items in red, bold text, go to [To resolve nonexistent line items on page 263](#). For information on resolving overpayments in black, bold text, go to [To resolve overpayments on page 264](#). For information on resolving lab chargebacks in red, bold or green, bold text, go to [To resolve lab chargeback entries on page 265](#).

► To resolve nonexistent line items

- 1 Open the Insurance Remittance Advice Entry window and load an ERA file. For information on opening the Insurance Remittance Advice Entry window and loading an ERA file, go to [To open the Insurance Remittance Advice Entry window on page 257](#).
- 2 Review the information displayed in the Insurance Remittance Advice Entry window. For more information on Reviewing the ERA information go to [To review the ERA information on page 259](#).

Nonexistent line items (i.e., items that appear in the ERA file, but were not included on the original claim sent to the insurance company) are listed in red, bold text.

- 3 For each line item listed in red, bold text, click the **Balance** column to view the available options.
 - Select **Distribute to existing lineitems** to distribute the payment to open line items on the fee slip.
 - Select **Look for other open insurance charges** to apply the overpayment to the open charges for the insurance carrier that may have appeared on another fee slip. The Ledger history will be updated.

Note

Select the Look for other open insurance charges option when two or more fee slips are associated with one payment.

S	Pat #	Fee Slip	Ref #	Patient Name	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	To Pat	To Sec	Balance
P	12	7	1732494600	SB, EVDL TPPO	1108.95	0.00	1193.95	113.40	25.00	0.00	50.40	933.55	110.00	0.00	100.00
	01/12/09	V2199	1	BF PL Blended 22 Cl	50.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00
	01/12/09	V2199	1	BF PL Blended 22 Cl	50.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00
	01/12/09	99213	1	99213	75.00	0.00	75.00	0.00	0.00	0.00	0.00	75.00	0.00	0.00	0.00
	01/12/09	V2213	1	BF PL Blended 22 Cl	190.00	0.00	190.00	0.00	0.00	0.00	0.00	190.00	0.00	0.00	0.00
	01/12/09	V2200	1	Lens - Bifocal	340.00	0.00	340.00	21.75	0.00	0.00	21.75	318.25	0.00	0.00	0.00
	01/12/09	V2213	1	BF PL Blended 22 Cl	190.00	0.00	190.00	21.75	0.00	0.00	0.00	10.00	0.00	0.00	0.00
	01/12/09	V2799	1	BF PL Blended 22 Cl	10.00	0.00	10.00	0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00
	01/12/09	V2761	1	Solid Gold Mirror	100.00	0.00	100.00	0.00	0.00	0.00	0.00	100.00	0.00	0.00	0.00
	01/12/09	V2799	1	BF PL Blended 22 Cl	10.00	0.00	10.00	0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00
	01/12/09	V2718	1	Press-On Prism	40.00	0.00	40.00	0.00	0.00	0.00	0.00	40.00	0.00	0.00	0.00
	01/12/09	V2799	1	Lab Charge Back	0.00	0.00	0.00	0.00	0.00	0.00	-38.00	38.00	0.00	0.00	0.00
	01/12/09	V2020	1	Buddy	33.95	0.00	118.95	67.90	25.00	0.00	42.90	-33.95	110.00	0.00	0.00
	01/12/09	V2756	1	Eyeglass Case	20.00	0.00	20.00	2.00	0.00	0.00	2.00	18.00	0.00	0.00	0.00

- 4 If you make a mistake, click **Undo** to undo your last action.
- 5 Resolve other line items that require attention. For information on resolving overpayments in black, bold text, go to [To resolve overpayments on page 264](#). For information on resolving lab chargebacks in red, bold text, go to [To resolve lab chargeback entries on page 265](#).
- 6 Click **Record** when you are finished.

► **To resolve overpayments**

- 1 Open the Insurance Remittance Advice Entry window and load an ERA file. For information on opening the Insurance Remittance Advice Entry window and loading an ERA file, go to [To open the Insurance Remittance Advice Entry window on page 257](#).
- 2 Review the information displayed in the Insurance Remittance Advice Entry window. For more information on Reviewing the ERA information go to [To review the ERA information on page 259](#).

Nonexistent line items (i.e., items that appear in the ERA file, but were not included on the original claim sent to the insurance company) are listed in red, bold text.

- 3 For each line item listed in black, bold text, click the **Balance** column to view the available options.
- Select **Distribute overpayment to other charges** to distribute the overpayment to open line items on the fee slip. The overpayment is applied to each item on the fee slip, starting with the first item listed and moving down, until the overpayment is exhausted.
 - Select **Adjust the open charge amount to match the overpayment** to add an adjustment line item to the fee slip. The overpayment amount moves from the Balance column to the Adjust column.
 - Select **Transfer the overpayment to the patient's credit** to transfer the overpayment amount to the patient's account.
 - Select **Look for other open insurance charges** to apply the overpayment to the open charges for the insurance carrier that may have appeared on another fee slip.

Insurance Remittance Advice Entry (Rev. 40)

Insurance

VSP

Load ERA File

Amount Paid

\$650.25

Interest Paid

\$0.00

Provider Adjustment

\$0.00

Method

Check

EFT

Check #

02629648

Bank #

Date

12/02/2008

Receipt No

Unapplied

\$0.00

Location

(All)

Recorded By

Doctor, Johnny

To Apply

\$0.00

Skipped

\$80.25

Applied

\$570.00

Undo

No Detail

All Detail

Unchecked Detail

S	Pat #	Fee Slip	Ref #	Patient Name	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	To Pat	To Sec	Balance
P	S		1732483900	EPS, NBSJF	600.00	0.00	585.00	200.00	0.00	0.00	200.00	385.00	0.00	0.00	0.00
<div> <div>Service Date</div> <div>CPT</div> <div>Units</div> <div>Description</div> <div>Billed</div> <div>PatPaid</div> <div>Open</div> <div>Allowed</div> <div>Patient</div> <div>SecInsur</div> <div>Payment</div> <div>Adjust</div> <div>To Pat</div> <div>To Sec</div> <div>Balance</div> </div> <div> <div>01/12/09</div> <div>V2522</div> <div>1</div> <div>SynerGeyes Multifocal</div> <div>300.00</div> <div>0.00</div> <div>285.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>285.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2522</div> <div>1</div> <div>SynerGeyes Multifocal</div> <div>300.00</div> <div>0.00</div> <div>300.00</div> <div>200.00</div> <div>0.00</div> <div>0.00</div> <div>200.00</div> <div>100.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> </div>															

S	Pat #	Fee Slip	Ref #	Patient Name	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	To Pat	To Sec	Balance
P	S	6	51732484000	EPBS, NBSL	457.95	0.00	542.95	150.40	10.00	0.00	3.40	505.05	95.00	0.00	-60.50
<div> <div>Service Date</div> <div>CPT</div> <div>Units</div> <div>Description</div> <div>Billed</div> <div>PatPaid</div> <div>Open</div> <div>Allowed</div> <div>Patient</div> <div>SecInsur</div> <div>Payment</div> <div>Adjust</div> <div>To Pat</div> <div>To Sec</div> <div>Balance</div> </div> <div> <div>01/12/09</div> <div>99212</div> <div>1</div> <div>99212</div> <div>55.00</div> <div>0.00</div> <div>55.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>55.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2781</div> <div>1</div> <div>PG PH160 Adaptor Clr</div> <div>10.00</div> <div>0.00</div> <div>10.00</div> <div>40.25</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>40.25</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2220</div> <div>1</div> <div>PG PH160 Adaptor Clr</div> <div>64.50</div> <div>0.00</div> <div>64.50</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>64.50</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2781</div> <div>1</div> <div>PG PH160 Adaptor Clr</div> <div>10.00</div> <div>0.00</div> <div>10.00</div> <div>40.25</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>40.25</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2220</div> <div>1</div> <div>PG PH160 Adaptor Clr</div> <div>64.50</div> <div>0.00</div> <div>64.50</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>64.50</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2799</div> <div>1</div> <div>Edge Coating</div> <div>30.00</div> <div>0.00</div> <div>30.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>30.00</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2782</div> <div>1</div> <div>PG PH160 Adaptor Clr</div> <div>40.00</div> <div>0.00</div> <div>40.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>40.00</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2750</div> <div>1</div> <div>Sharpview</div> <div>90.00</div> <div>0.00</div> <div>90.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>90.00</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2782</div> <div>1</div> <div>PG PH160 Adaptor Clr</div> <div>40.00</div> <div>0.00</div> <div>40.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>40.00</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2799</div> <div>1</div> <div>Lab Charge Back</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>-137.00</div> <div>137.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> <div>0.00</div> </div> <div> <div>01/12/09</div> <div>V2020</div> <div>1</div> <div>Kidco #6</div> <div>33.95</div> <div>0.00</div> <div>118.95</div> <div>67.90</div> <div>10.00</div> <div>0.00</div> <div>57.90</div> <div>-33.95</div> <div>95.00</div> <div>0.00</div> <div>0.00</div> </div>															

Distribute overpayment to other charges

Adjust the open charge amount to match the overpayment

Transfer the overpayment to the patient's credit

Look for other open insurance charges

Print

Add Reason

Other Ins

Record

Cancel

- 4 If you make a mistake, click **Undo** to undo your last action.
 - 5 For information on resolving nonexistent line items in red, bold text, go to [To resolve nonexistent line items on page 263](#). Resolve other line items that require attention. For information on resolving lab chargebacks in red, bold text, go to [To resolve lab chargeback entries on page 265](#).
 - 6 Click **Record** when you are finished.
- **To resolve lab chargeback entries**
- 1 Open the Insurance Remittance Advice Entry window and load an ERA file. For information on opening the Insurance Remittance Advice Entry window and

loading an ERA file, go to [To open the Insurance Remittance Advice Entry window on page 257](#).

- 2 Review the information displayed in the Insurance Remittance Advice Entry window. For more information on Reviewing the ERA information go to [To review the ERA information on page 259](#).
- 3 For each line item listed in red, bold text, click the **Balance** column to view the available options.
 - Select **Distribute to existing lineitems** to distribute the negative amount across line items on the fee slip. Payments made to the other line items in the fee slip will be reduced by the amount of the lab chargeback.
 - Select **Insert as an insurance chargeback** to add the chargeback as a new line item to the fee slip. The line turns green and the Ledger history is updated.

Insurance Remittance Advice Entry (Rev. 40)

Insurance: YSP Load ERA File

Date: 12/02/2008

Receipt No:

Unapplied: \$0.00

Location: (All)

Recorded By: Doctor, Johnny

Amount Paid: \$650.25

Interest Paid: \$0.00

Provider Adjustment: \$0.00

Method: ☒ Check ☐ EFT

Check #: 02629648

Bank #:

To Apply: \$0.00 Skipped: \$80.25 Applied: \$570.00

Undo No Detail All Detail Unchecked Detail

S	Pat #	Fee Slip	Ref #	Patient Name	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payments	Adjust	To Pat	To Sec	Balance
P	3	2	1732483700	OFFPGJUTUPT, EPSB	529.50	0.00	514.50	43.50	0.00	0.00	36.50	478.00	0.00	0.00	0.00
Service Date	CPT	Units	Description	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payment	Adjust	To Pat	To Sec	Balance	
01/12/09	V2781	1	PG PH160 Accol Clr	65.00	0.00	65.00	43.50	0.00	0.00	43.50	21.50	0.00	0.00	0.00	
01/12/09	V2220	1	PG PH160 Accol Clr	64.50	0.00	64.50	0.00	0.00	0.00	0.00	64.50	0.00	0.00	0.00	
01/12/09	V2214	1	BF GL FT 22 Clr	160.00	0.00	145.00	0.00	0.00	0.00	0.00	145.00	0.00	0.00	0.00	
01/12/09	V2214	1	BF GL FT 22 Clr	160.00	0.00	160.00	0.00	0.00	0.00	0.00	160.00	0.00	0.00	0.00	
01/12/09	V2799	1	BF GL FT 22 Clr	10.00	0.00	10.00	0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00	
01/12/09	V2799	1	BF GL FT 22 Clr	10.00	0.00	10.00	0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00	
01/12/09	V2755	1	UV Coating	20.00	0.00	20.00	0.00	0.00	0.00	0.00	20.00	0.00	0.00	0.00	
01/12/09	V2782	1	PG PH160 Accol Clr	40.00	0.00	40.00	0.00	0.00	0.00	0.00	40.00	0.00	0.00	0.00	
01/12/09	V2799	1	Lab Charge Back	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
S	Pat #	Fee Slip	Ref #	Patient Name	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Paym	Adjust	To Pat	To Sec	Balance
P	31	10	1732486500	DIFTUOVU, KPBOO	903.45	0.00	983.45	86.95	25.00	0.00	-10.05	888.50	105.00	0.00	0.00
Service Date	CPT	Units	Description	Billed	PatPaid	Open	Allowed	Patient	SecInsur	Payment	Adjust	To Pat	To Sec	Balance	
01/14/09	V2781	1	PG PH160 Accol Clr	65.00	0.00	65.00	27.00	0.00	0.00	27.00	38.00	0.00	0.00	0.00	
01/14/09	V2220	1	PG PH160 Accol Clr	64.50	0.00	64.50	0.00	0.00	0.00	0.00	64.50	0.00	0.00	0.00	
01/14/09	V2214	1	BF GL CT 25 Clr	190.00	0.00	190.00	0.00	0.00	0.00	0.00	190.00	0.00	0.00	0.00	
01/14/09	V2214	1	BF GL CT 25 Clr	190.00	0.00	190.00	0.00	0.00	0.00	0.00	190.00	0.00	0.00	0.00	

Print Adj Reason Other Ins Record Cancel

Note

Lab chargeback entries that are in green, bold text do not require your attention. The green, bold entry simply indicates that the patient's payment matches or exceeds the lab chargeback.

- 4 If you make a mistake, click **Undo** to undo your last action.
- 5 Resolve other line items that require attention. For information on resolving nonexistent line items in bold, red text, go to [To resolve nonexistent line items on page 263](#). For information on resolving overpayments in bold, black text, go to [To resolve overpayments on page 264](#).
- 6 Click **Record** when you are finished.

► To resolve irreconcilable entries

Note

Occasionally, OfficeMate cannot match claims in the electronic remittance advice file to a fee slip. This mismatch is usually due to the patient's name being different in the insurance carrier's records than the name recorded in OfficeMate.

- 1 Open the Insurance Remittance Advice Entry window and load an ERA file. For information on opening the Insurance Remittance Advice Entry window and loading an ERA file, go to [To open the Insurance Remittance Advice Entry window on page 257](#).
- 2 Resolve the line items requiring attention. For information resolving line items, go to [To resolve nonexistent line items on page 263](#), [To resolve overpayments on page 264](#), and [To resolve lab chargeback entries on page 265](#).
- 3 Click **Record** when you are finished and close the Insurance Remittance Advice Entry window.
- 4 Open the Receipts & Adjustments window to record the irreconcilable entries. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 5 Click the **Apply to Insurance** tab.
- 6 Apply the insurance payments to open balances. For more information on applying insurance payments to open balances, go to [Applying Insurance Payments to Open Balances on page 254](#).

Recording Insurance Chargebacks

For more information on insurance chargebacks, see the "How To - Recording Insurance Chargebacks" iTrain.

Insurance audit procedures can result in a patient "chargeback" to collect a previous insurance overpayment or lab fee, or pay an amount higher than a patient's open balance.

Note

The patient's insurance must have been billed through the Fee Slip window before you post a chargeback to the patient's account. An overpayment or underpayment chargeback can be recorded for patients with or without open balances. For more information on recording fee slips, go to [Recording Fee Slips & Printing Receipts on page 202](#).

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.
- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Detail View**.

- 6 Select one of the following payment Method radio buttons:
 - **Check**
 - **Other**
- 7 Type the payment amount in the **Amount Paid** text box.
- 8 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.
- 9 If you want to record a payment for the amount in the Amount Paid text box while you are recording the chargeback, click in an item's **Payment** text box and type the payment amount. For more information on applying insurance payments to open balances, go to [Applying Insurance Payments to Open Balances on page 254](#).

- 10 Right-click on a patient's line item and select **Insurance Charge Back**.

OR

Click **Ins. ChargeBack** and find and select a patient from the Find Patient window.

Note

The selected patient must be assigned to the same insurance company that you selected in step 3 above. For more information on assigning insurance companies to patients, go to [To record insurance information on page 89](#).

Receipts & Adjustments Patient: Sally Carter [ALERT] DOB: 10/08/1956

Apply to Patient Receivable | Apply to Insurance

Insurance: Vision Service Plan | Date: 05/11/2006

Service Date Range: 05/11/2005 to 05/11/2006 | Display Charges

Amount Paid: \$20.00 | Method: ☒ Check ☐ Other

Amount Applied: \$20.00 | Type: [Dropdown]

Amount TransF'd: \$0.00 | Check #: 5465

To Apply: \$0.00 | Bank #: 4558256

Receipt No: 28 | Unapplied: \$35.00 | Ins. ChargeBack

Recorded By: Franklin, Helen

Ref #	Patient Name	Open Charges	Payments	Balance	TransF'd
-	Carter, Sally	92.96	20.00	72.96	

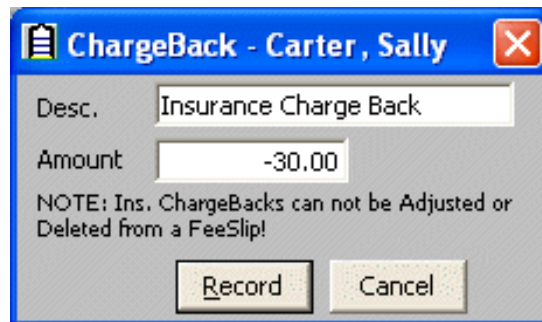
Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
03/24/2006	Carter, Sally	V2520	1	Multipack Acuvue	30.00	20.00	
03/20/2006	Carter, Sally	V2020	1	IRLOCK 760/1	62.96	0.00	62.96

Totals: 92.96 | 20.00 | 72.96 | .00

History | Delete | Global Adjustment | Record | Print | Cancel | New | Adj

The **ChargeBack** window opens.

- 11 Complete one of the following tasks:
 - Delete the \$ sign and then type a minus sign and a negative amount in the **Amount** text box to record an insurance chargeback.
 - Delete the \$ sign and then type a positive amount in the **Amount** text box to record an insurance overpayment.



ChargeBack - Carter, Sally

Desc. Insurance Charge Back

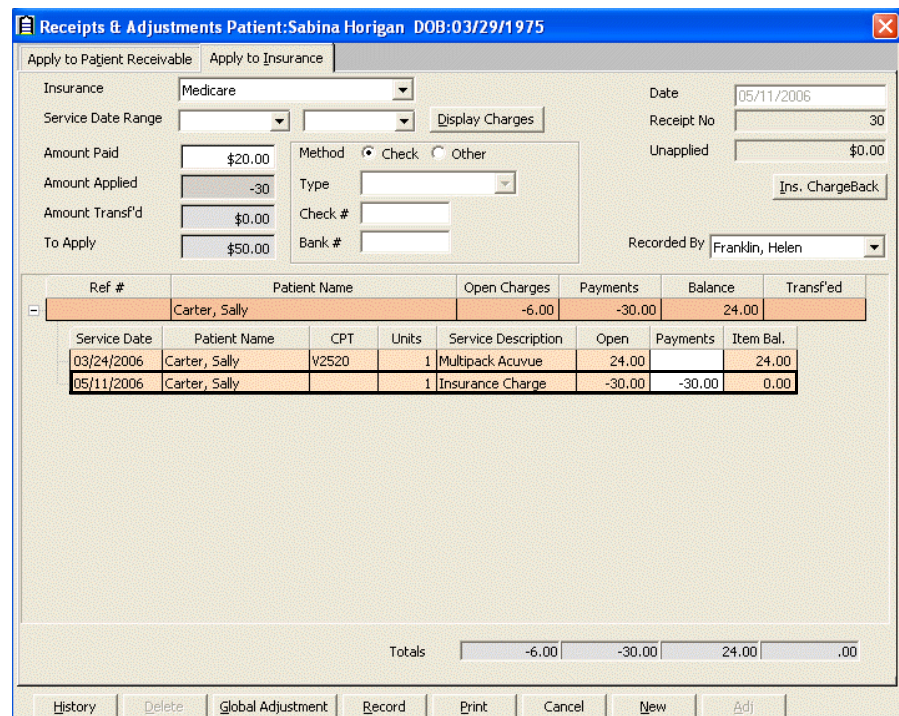
Amount -30.00

NOTE: Ins. ChargeBacks can not be Adjusted or Deleted from a Fee Slip!

Record Cancel

- 12 Click **Record**.

A chargeback is posted and displayed as a line item in the Receipts & Adjustments and Fee Slip windows.



Receipts & Adjustments Patient: Sabina Horigan DOB: 03/29/1975

Apply to Patient Receivable Apply to Insurance

Insurance Medicare Date 05/11/2006

Service Date Range Display Charges

Amount Paid \$20.00 Method Check Other

Amount Applied -30 Type

Amount Transf'd \$0.00 Check #

To Apply \$50.00 Bank #

Unapplied \$0.00 Ins. ChargeBack

Recorded By Franklin, Helen

Ref #	Patient Name	Open Charges	Payments	Balance	Transf'd
-	Carter, Sally	-6.00	-30.00	24.00	

Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
03/24/2006	Carter, Sally	V2520	1	Multipack Acuvue	24.00		24.00
05/11/2006	Carter, Sally		1	Insurance Charge	-30.00	-30.00	0.00

Totals -6.00 -30.00 24.00 .00

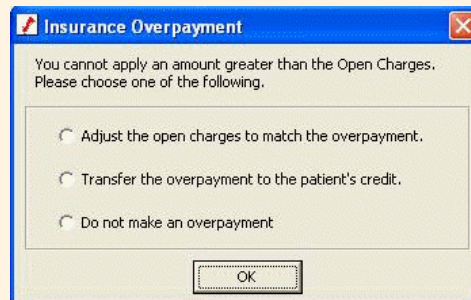
History Delete Global Adjustment Record Print Cancel New Adj

- 13 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 14 Click in the **Payment** text boxes and apply all or part of the amount in the To Apply box to patients' open balances.
- 15 Click **Print** if you want to print the list of patient insurance receivables.

16 Click **Record** in the Receipts & Adjustments window.

Notes

- If you try to record a payment on a line item in the detailed view that is higher than the open charges, the Insurance Overpayment window opens. Choose to adjust the open charges to match the overpayment amount, transfer the overpayment to the patient's credit, or not make the overpayment.
 - If you adjust the open charges to match the overpayment amount, OfficeMate automatically increases the balance to match the overpayment. The amount in the Patient's Ledger will display "(ADJ)" next to it.
 - If you transfer the overpayment to the patient's credit, the correct amount is credited to the line item and the overpayment is transferred to the patient.
 - If you do not make an overpayment, the payment will automatically be corrected to be the same amount as the open charges.



- After you record a payment, the payment is assigned a receipt number. To view and change payments, click **History**. For more information on viewing and changing payments, go to [Modifying Payments Using the Receipt History on page 291](#).

Adjusting, Transferring, & Writing Off Charges

When you are recording payments you can adjust charges due to previous entry errors, transfer amounts, and write off amounts. All adjustments are recorded as separate items and provide a complete history of the changes made to charges.

To adjust charges that have had payments made on them, use the Receipt History window. For more information on using the Receipt History window, go to [Modifying Payments Using the Receipt History on page 291](#).

To adjust prior charges, use the Detail view in the Patient Ledger window. For more information on using the Patient Ledger window, go to [Using the Patient Ledger on page 295](#).

This section includes the following topics:

- [Adjusting Charges, 272](#)
- [Transferring Charges, 283](#)
- [Writing Off Charges, 289](#)

Adjusting Charges

This section tells you how to adjust charges, including how

- [To add & modify adjustment types, 272](#)
- [To adjust patients' charges, 273](#)
- [To adjust insurance charges, 276](#)
- [To adjust charges on receipts, 278](#)
- [To record insurance denials, 280](#)

Note

To adjust previous payments and charges, go to [Modifying Payments Using the Receipt History on page 291](#).

► To add & modify adjustment types

Note

You can add and modify adjustment types from the Customization window. For more information on adding and modifying adjustment types from the Customization window, go to [To add list box selections on page 34](#) and [To modify list box selections on page 34](#).

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Enter information into the **Apply to Patient Receivable** or **Apply to Insurance** tabs.
- 3 Click **Adj.**
The **Fee Slip Item Adjustment** window opens.
- 4 Press **F12**.
The **Maintain Adjustment Types** window opens.

- 5 Add or edit text in the **Description** text boxes.

Description	NSF Code
Patient Refund	
Patient Write-Off	
Product Return	
Transfer from Insurance to Patient	
Transfer from Patient to Insurance	
Transfer to Another Insurance	
VSP - Insurance Charge Adj.	
VSP - Lab Charge Adjustment	

- 6 Highlight an adjustment type and click **Default** to select the adjustment type as the default type; or, click **UnDefault** to deselect the adjustment type as the default type.
- 7 Click **OK**.

► **To adjust patients' charges**

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Select one of the following payment Method radio buttons:
 - **Check**
 - **Cash**
 - **Other**
- 3 Type the payment amount in the **Amount Paid** text box.
- 4 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying a cash payment, type the cash amount tendered in the **Tendered** text box. The change amount (if applicable) appears in the **Change** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.
- 5 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 6 Click in the **Payment** text box for the item that you want to adjust.

- 7 Click **Adj.**

Date	Slip #	Patient	Code/Name	Open	Payment	Balance	Refund
02/10/2005	84	Abby Dandan	101 COACH ASTOR	178.99	30.00	148.99	
				Totals	178.99	30.00	148.99
							.00

The **Fee Slip Item Adjustment** window opens.

- 8 Select an adjustment type from the **Adj. Type** drop-down menu. For more information on adding and modifying adjustment types, go to [To add & modify adjustment types on page 272](#).
- 9 Select the **Increase** or **Decrease** Balance Effect radio button.
- Note** To correct a negative balance, select the **Decrease** radio button.
- 10 Type the amount that you want to increase or decrease the item in the **Amount** text box.
- 11 Type a reason for the adjustment in the **Reason** text box, if necessary.
- 12 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 13 If applicable, select the **Do not print on patient statement** check box if you do not want the adjustment to print on the Statements report.

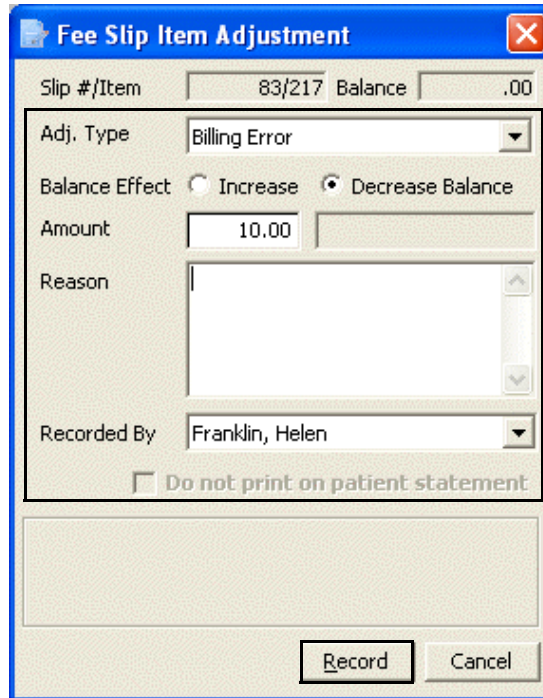
Notes

- Selecting the **Do not print on patient statement** check box temporarily effects balances on the financial statement.
- You must select the **Yes** radio button in the System Preferences window's Statements tab to select the Do not print on patient statement check box in the Fee Slip Item Additional Data window. For more information on selecting Statements system preferences, go to [To define and change statement preferences on page 72](#).

- 14 Click **Record**.

Note

After you record an adjustment, the adjustment is assigned a receipt number. To view adjustments, click **Ledger**.



The screenshot shows a dialog box titled "Fee Slip Item Adjustment" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Slip #/Item:** A text box containing "83/217".
- Balance:** A text box containing ".00".
- Adj. Type:** A dropdown menu with "Billing Error" selected.
- Balance Effect:** Two radio buttons: "Increase" (unselected) and "Decrease Balance" (selected).
- Amount:** A text box containing "10.00".
- Reason:** A large empty text area for notes.
- Recorded By:** A dropdown menu with "Franklin, Helen" selected.
- Do not print on patient statement:** An unchecked checkbox.
- Buttons:** "Record" and "Cancel" buttons at the bottom right.

- 15 Click **Record** on the Receipts & Adjustments window.

► To adjust insurance charges

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.
- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Detail View**.
- 6 Select one of the following payment Method radio buttons:
 - **Check**
 - **Other**
- 7 Type the payment amount in the **Amount Paid** text box.
- 8 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.
- 9 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 10 Click in the **Payment** text box for the item that you want to adjust.

11 Click **Adj.**

Receipts & Adjustments

Apply to Patient Receivable | Apply to Insurance

Insurance: Vision Service Plan | Date: 05/12/2006

Service Date Range: 05/12/2005 to 05/12/2006 | Display Charges

Amount Paid: \$30.00 | Method: ☒ Check ☐ Other

Amount Applied: \$0.00 | Type: []

Amount Transf'd: \$0.00 | Check #: 456

To Apply: \$30.00 | Bank #: 5464

Receipt No: 33 | Unapplied: \$135.00 | Ins. ChargeBack

Recorded By: Franklin, Helen

Ref #	Patient Name	Open Charges	Payments	Balance	Transf'd
-	Carter, Sally	102.96	0.00	102.96	

Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
03/24/2006	Carter, Sally	V2520	1	Multipack Acuvue	40.00		40.00
03/20/2006	Carter, Sally	V2020	1	IRLOCK 760/1	62.96	0.00	62.96

Ref #	Patient Name	Open Charges	Payments	Balance	Transf'd
-	Horgan, Sabina	10.78	0.00	10.78	

Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
05/11/2006	Horgan, Sabina	92370	1	Acuvue	10.78	0.00	10.78

Totals: 113.74 | .00 | 113.74 | .00

History | Delete | Global Adjustment | Record | Print | Cancel | New | **Adj**

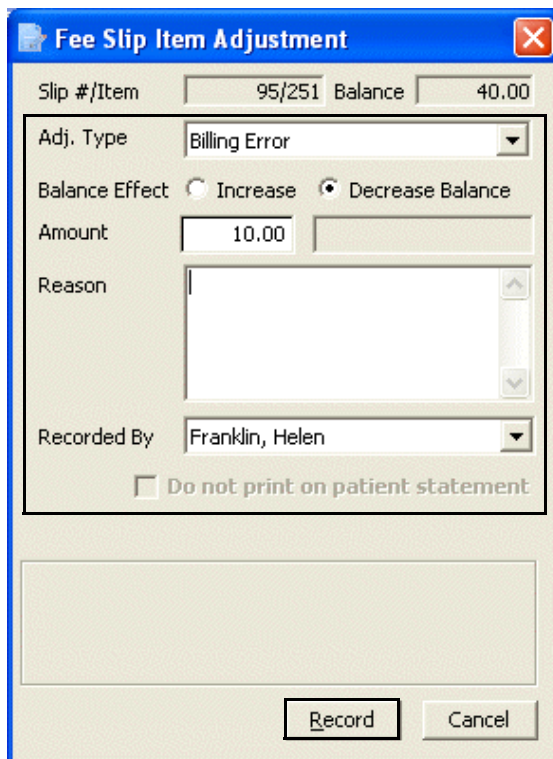
The **Fee Slip Item Adjustment** window opens.

- 12 Select an adjustment type from the **Adj. Type** drop-down menu. For more information on adding and modifying adjustment types, go to [To add & modify adjustment types on page 272](#).
- 13 Select the **Increase** or **Decrease** Balance Effect radio button.
- 14 Type the amount that you want to increase or decrease the item in the **Amount** text box.
- 15 Type a reason for the adjustment in the **Reason** text box, if necessary.
- 16 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 17 If applicable, select the **Do not print on patient statement** check box if you do not want the adjustment to print on the Statements report.

Notes

- Selecting the **Do not print on patient statement** check box temporarily effects balances on the financial statement.
- You must select the **Yes** radio button in the System Preferences window's Statements tab to select the Do not print on patient statement check box in the Fee Slip Item Additional Data window. For more information on selecting Statements system preferences, go to [To define and change statement preferences on page 72](#).

- 18 Click **Record**.



The 'Fee Slip Item Adjustment' dialog box is shown. It contains the following fields and controls:

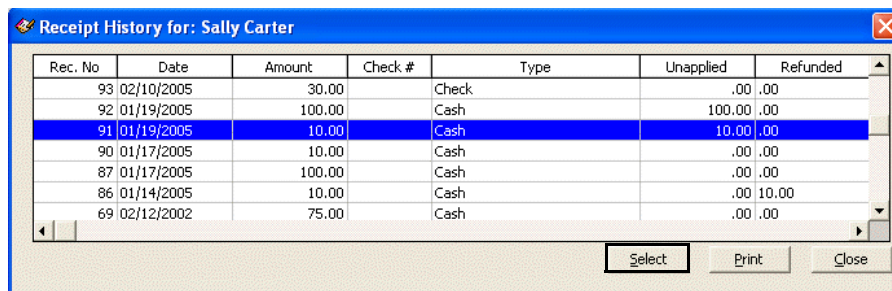
- Slip #/Item:** 95/251
- Balance:** 40.00
- Adj. Type:** Billing Error (dropdown menu)
- Balance Effect:** Increase (radio button), Decrease Balance (radio button, selected)
- Amount:** 10.00
- Reason:** (empty text area)
- Recorded By:** Franklin, Helen (dropdown menu)
- Do not print on patient statement:** (unchecked checkbox)
- Buttons:** Record, Cancel

- 19 Click **Record** on the Receipts & Adjustments window.

► To adjust charges on receipts

Follow the instructions below to adjust an item that has already been paid:

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click **History**.
The **Receipt History** window opens.
- 3 Click on the payment receipt that you want to adjust, click **Select**, and select **Load Summary View** or **Load Detail View**.



The 'Receipt History for: Sally Carter' window displays a table of receipts. The table has the following columns: Rec. No, Date, Amount, Check #, Type, Unapplied, and Refunded. The row for Rec. No 91, dated 01/19/2005, is highlighted in blue.

Rec. No	Date	Amount	Check #	Type	Unapplied	Refunded
93	02/10/2005	30.00		Check	.00	.00
92	01/19/2005	100.00		Cash	100.00	.00
91	01/19/2005	10.00		Cash	10.00	.00
90	01/17/2005	10.00		Cash	.00	.00
87	01/17/2005	100.00		Cash	.00	.00
86	01/14/2005	10.00		Cash	.00	10.00
69	02/12/2002	75.00		Cash	.00	.00

Buttons at the bottom: Select, Print, Close

- 4 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 5 Click in the **Payment** text box for the item that you want to adjust.
- 6 Click **Adj.**
The **Fee Slip Item Adjustment** window opens.
- 7 Select an adjustment type from the **Adj. Type** drop-down menu. For more information on adding, deleting, or modifying adjustment types, go to [To add & modify adjustment types on page 272](#).
- 8 Select the **Increase** or **Decrease** Balance Effect radio button.
- 9 Type the amount that you want to increase or decrease the item in the **Amount** text box.
- 10 Type a reason for the adjustment in the **Reason** text box, if necessary.
- 11 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 12 If applicable, select the **Do not print on patient statement** check box if you do not want the adjustment to print on the Statements report.

Notes

- Selecting the **Do not print on patient statement** check box temporarily effects balances on the financial statement.
- You must select the **Yes** radio button in the System Preferences window's Statements tab to select the Do not print on patient statement check box in the Fee Slip Item Additional Data window. For more information on selecting Statements system preferences, go to [To define and change statement preferences on page 72](#).

- 13 Click **Record**.

- 14 Click **Record** on the Receipts & Adjustments window.

► **To record insurance denials**

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.
- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Detail View**.
- 6 Select one of the following payment Method radio buttons:
 - **Check**
 - **Other**
- 7 Type the payment amount in the **Amount Paid** text box.
- 8 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.

- 9 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 10 Click in the **Payment** text box for the item that you want to adjust.
- 11 Click **Adj.**

Receipts & Adjustments

Apply to Patient Receivable | Apply to Insurance

Insurance: Vision Service Plan
 Service Date Range: 05/12/2005 to 05/12/2006
 Amount Paid: \$30.00
 Amount Applied: \$0.00
 Amount Transf'd: \$0.00
 To Apply: \$30.00
 Method: ☒ Check ☐ Other
 Type:
 Check #: 456
 Bank #: 5464
 Date: 05/12/2006
 Receipt No: 33
 Unapplied: \$135.00
 Recorded By: Franklin, Helen

Ref #	Patient Name	Open Charges	Payments	Balance	Transf'd		
-	Carter, Sally	102.96	0.00	102.96			
Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
03/24/2006	Carter, Sally	V2520	1	Multipack Acuvue	40.00		40.00
03/20/2006	Carter, Sally	V2020	1	IRLOCK 760/1	62.96	0.00	62.96
-	Horigan, Sabina	10.78	0.00	10.78			
Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
05/11/2006	Horigan, Sabina	92370	1	Acuvue	10.78	0.00	10.78
Totals		113.74	.00	113.74	.00		

History | Delete | Global Adjustment | Record | Print | Cancel | New | **Adj.**

The **Fee Slip Item Adjustment** window opens.

- 12 Select **Insurance Denial** from the **Adj. Type** drop-down menu.
- 13 Type an amount in the **Amount** text box, or leave the text box blank.
- 14 Type a reason for the denial in the **Reason** text box, if necessary.

Note

If the Print reason for Ins denial statements selection criteria check box is selected, the reason will print on the patient's statement. For more information on printing statements, go to [Statements on page 463](#).

- 15 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).

- 16 If applicable, select the **Do not print on patient statement** check box if you do not want the adjustment to print on the Statements report.

Notes

- Selecting the **Do not print on patient statement** check box temporarily effects balances on the financial statement.
- You must select the **Yes** radio button in the System Preferences window's Statements tab to select the Do not print on patient statement check box in the Fee Slip Item Additional Data window. For more information on selecting Statements system preferences, go to [To define and change statement preferences on page 72](#).

- 17 Click **Record**.

The screenshot shows the 'Fee Slip Item Adjustment' dialog box. The fields are as follows:

- Slip #/Item: 11/23
- Balance: .00
- Adj. Type: Insurance Denial
- Balance Effect: ☐ Increase, ☒ Decrease Balance
- Amount: 0.00
- Reason: Invalid Diagnosis Code
- Recorded By: Franklin, Helen
- ☐ Do not print on patient statement
- Buttons: Record, Cancel

- 18 Click **Record** on the Receipts & Adjustments window.

Note

After you record an insurance denial, a line item note is displayed on the Patient/Insurance tab in the Patient Ledger window. This note states why the claim was rejected by the insurance carrier.

For more information on transferring charges, see the "How To - Transferring Patient Balances to Insurance" iTrain.

Transferring Charges

This section tells you how to transfer unpaid balances between insurance companies and patients, including how

- [To transfer insurance charges, 283](#)
- [To transfer insurance charges to patients, 286](#)
- [To transfer unapplied insurance credits to patients, 287](#)

Note

You cannot transfer patient balances to other patients.

► To transfer insurance charges

You can transfer all or part of any unpaid insurance charges to another insurance company or to a patient.

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.
- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Detail View**.
If a payment applied to an item creates an open balance and you want to transfer the open balance, complete steps 6-8; otherwise, go to step 9.
- 6 Select one of the following payment Method radio buttons:
 - **Check**
 - **Other**
- 7 Type the payment amount in the **Amount Paid** text box.
- 8 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.
- 9 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 10 Click in the **Payment** text box for the item you want to transfer.
- 11 Click **Adj.**

The **Fee Slip Item Adjustment** window opens.

- 12 Select one of the following adjustment types from the **Adj. Type** drop-down menu:
 - **Transfer from Insurance to Patient** if you are transferring the charge to the patient.
 - **Transfer to Another Insurance** if you are transferring the charge to another insurance company and select an insurance company from the **Insurance** drop-down menu.
- 13 If you want to transfer part of the open balance, type the amount that you want to transfer in the **Amount** text box.
- 14 Type a reason for the transfer in the **Reason** text box, if necessary.
- 15 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 16 If applicable, select the **Do not print on patient statement** check box if you do not want the adjustment to print on the Statements report.

Notes

- Selecting the **Do not print on patient statement** check box temporarily effects balances on the financial statement.
- You must select the **Yes** radio button in the System Preferences window's Statements tab to select the Do not print on patient statement check box in the Fee Slip Item Additional Data window. For more information on selecting Statements system preferences, go to [To define and change statement preferences on page 72](#).

- 17 If you are transferring a payment to another insurance and you do not want to create a CMS 1500 form in the Third Party Processing window, select the **Do not show on 3rd party** check box.

Note

To view and print the CMS 1500 insurance claim, open the patient's Demographic window, click the **Insurance** tab, and then click the **CMS Form** button.

- 18 If you are transferring the charge to another insurance company, select the name of the insurance company to which you are transferring the charge from the **Insurance** drop-down menu.

Note

The patient must have an additional insurance company recorded in order for the insurance company to appear in the drop-down menu. For more information on recording additional insurance companies, go to [To record insurance information on page 89](#).

Fee Slip Item Adjustment

Slip #/Item: 95/251 Balance: 40.00

Adj. Type: Transfer to Another Insurance

Balance Effect: ☐ Increase ☒ Decrease Balance

Amount: 40.00

Reason: Error.

Recorded By: Franklin, Helen

☐ Do not print on patient statement

☒ Do not show on 3rd party

Transfer Insurance

☒ To another Insurance

Insurance: Medicare

Record Cancel

- 19 Click **Record**.
- 20 Click **Record** on the Receipts & Adjustments window.

► To transfer insurance charges to patients

You can transfer all insurance charges to a patient. If an insurance company does not pay the full amount of one or more open items, you can transfer the unpaid open items to which you applied payments. If you are transferring insurance charges to patients, the difference between the amount owed and the amount paid is recorded as a general Global Transfer to Patient adjustment. If you want to track what you are transferring by each insurance company, set up an adjustment type for each company instead of using the Transfer to Patient feature.

Note

Consult with your insurance billing accountant to determine if transferring insurance charges to patients is appropriate for your office.

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.
- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Summary View** or **Display Detail View**.
- 6 Select one of the following payment Method radio buttons:
 - **Check**
 - **Other**
- 7 Type the payment amount in the **Amount Paid** text box.
- 8 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.
- 9 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).

- 10 Click in an item's **Payment** text box and type the payment amount to apply the amount to a specific item.

Ref #	Patient Name	Open Charges	Payments	Balance	Transf'd
-	Carter, Sally	92.96	20.00	72.96	

Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
03/24/2006	Carter, Sally	V2520	1	Multipack Acuvue	30.00	20.00	10.00
03/20/2006	Carter, Sally	V2020	1	IRLOCK 760/1	62.96	0.00	62.96

Totals	92.96	20.00	72.96	.00
--------	-------	-------	-------	-----

- 11 Click **Global Adjustment** and select **Transfer to Patient** to transfer the balance of the items to which you applied payments.

Note

- If you are transferring charges in the summary view, clicking **Transfer to Patient** will transfer insurance balances for *all* of the patients displayed.
- If you are transferring charges in the detail view, clicking **Transfer to Patient** will transfer insurance balances *with partially applied payments* for *all* of the patients displayed.

The **Transfer to patient confirmation** window opens.

- 12 Click **Yes** to continue transferring the balances.

Balances that remained after you posted payments to them are transferred.
Balances with no applied payments are not transferred.

► To transfer unapplied insurance credits to patients

Note

You cannot delete an insurance credit after it has been transferred.

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.

- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Summary View** or **Display Detail View**.
- 6 Click **History**.
The **Receipt History** window opens.
- 7 Select an item to transfer and click **Transfer**.

Rec. No	Date	Amount	Check #	Type	Unapplied	Transferred
13	01/17/2005	100.00		Check	100.00	.00
12	01/14/2005	10.00		Check	10.00	.00
7	04/02/2001	426.00		Check	.00	.00
Totals		536.00			110.00	.00

Transfer Select Print Close

The **Find Patient** window opens.

- 8 Find and select a patient who has the same insurance carrier that overpaid and to whom you want to transfer the amount.
The **Insurance Transfer** window opens.
- 9 Type the transfer amount in the **Amount** text box.
- 10 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 11 Click **Record**.

Transferring an Insurance Unapplied Amount to
Patient: Mr. Henry A Mitchell
 DOB: 04/18/1935 SSN: 222-22-2222

Amount: \$100.00 Recorded By: Franklin, Helen

Record Cancel

Note

You can view unapplied insurance credits that were transferred to patients in the patient Receipt History tab on the Patient Ledger window, the Receipts History window, and in the Transferred Unapplied Ins. Amount report.

Writing Off Charges

If an insurance company does not pay the full amount of one or more open items, you can write off the unpaid open balances to which you applied payments. If you are writing off charges, the difference between the amount owed and the amount paid is recorded as a general Global Write-off adjustment. If you want to track what you are writing off by each insurance company, set up an adjustment type for each company instead of using the Global Write-off.

Note

Consult with your insurance billing accountant to determine if writing off charges is appropriate for your office.

- 1 Open the Receipts & Adjustments window. For more information on opening the Receipts & Adjustments window, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click the **Apply to Insurance** tab.
- 3 Select an insurance company from the **Insurance** drop-down menu.
- 4 Type or select dates in the **Date Range** boxes if you want to view patients that are reflected on date-specific EOBs.
- 5 Click **Display Charges** and select **Display Summary View** or **Display Detail View**.
- 6 Select one of the following payment Method radio buttons:
 - **Check**
 - **Other**
- 7 Type the payment amount in the **Amount Paid** text box.
- 8 Apply the payment amount using one of the following methods:
 - If you are applying a check payment, type the check number for your deposit ticket in the **Check #** text box and type the bank number for your deposit ticket in the **Bank #** text box.
 - If you are applying another type of payment, select the payment type from the **Type** drop-down menu.
- 9 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).

- 10 Click in an item's **Payment** text box and type the payment amount to apply the amount to a specific item.

Receipts & Adjustments Patient: Sally Carter [ALERT] DOB: 10/08/1956

Apply to Patient Receivable | **Apply to Insurance**

Insurance: Vision Service Plan
 Service Date Range: 05/11/2005 to 05/11/2006 | Display Charges
 Amount Paid: \$20.00 | Method: ☒ Check ☐ Other
 Amount Applied: \$20.00 | Type:
 Amount Transf'd: \$0.00 | Check #: 5465
 To Apply: \$0.00 | Bank #: 4558256

Date: 05/11/2006
 Receipt No: 28
 Unapplied: \$35.00
 Ins. ChargeBack
 Recorded By: Franklin, Helen

Ref #	Patient Name	Open Charges	Payments	Balance	Transf'd
-	Carter, Sally	92.96	20.00	72.96	

Service Date	Patient Name	CPT	Units	Service Description	Open	Payments	Item Bal.
03/24/2006	Carter, Sally	V2520	1	Multipack Acuvue	30.00	20.00	10.00
03/20/2006	Carter, Sally	V2020	1	IRLOCK 760/1	62.96	0.00	62.96

Totals: 92.96 | 20.00 | 72.96 | .00

History | Delete | Global Adjustment | Record | Print | Cancel | New | Adj

- 11 Click **Global Adjustment** and select **Write Off** to write off the balance of the items to which you applied payments.

Notes

- If you are writing off or transferring charges in the summary view, clicking **Write Off** or **Transfer to Patient** will write off or transfer insurance balances for all of the patients displayed to whom insurance payments were applied.
- If you are writing off or transferring charges in the detail view, clicking **Write Off** or **Transfer to Patient** will write off or transfer insurance balances on all of the line items displayed to which *partial insurance payments* were applied.

The **Write-Off Confirmation** window opens.

- 12 Click **Yes** to continue writing off the balances.

Balances that remained after you posted payments to them are written off.
 Balances with no applied payments are not written off.

Modifying Payments Using the Receipt History

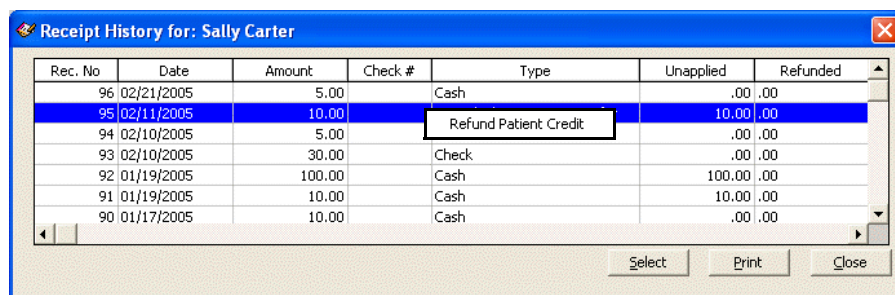
OfficeMate assigns each payment a receipt number. The payments from a patient or insurance company can be viewed in the Receipt History window.

This section tells you how to modify payments using the Receipt History window, including how

- To refund unapplied patient credits, 291
- To delete payment receipts, 293
- To modify recorded payments, 294
- To pay open items with credit amounts, 294

► To refund unapplied patient credits

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click **History**.
The **Receipt History** window opens.
- 3 Right-click on an item for which you want to refund an unapplied patient credit and select **Refund Patient Credit**.



The **Refund Patient Credit** window opens.

- 4 Complete the fields in the **Patient Refund** section.

- 5 Click **Refund** and follow the instructions below to record the refund and print a receipt.
- Click **Print** to print a receipt.
 - Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).
 - Click **Close** to close the Patient Refund Credit Receipt window.

Note

To view a list of patient credit refunds, print the Patient Credit Refund report. For more information on the Patient Credit Refund report, go to [Patient Credit Refund on page 448](#).

► To delete payment receipts

Note

Deleting receipt payment information does not remove all traces of the receipt. The receipt amount is reset to zero and the charges that were paid by the receipt are once again unpaid. The receipt remains in the Receipts History window with an amount of zero.

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments](#) on page 245.
- 2 Click **History**.
The **Receipt History** window opens.
- 3 Select the payment receipt you want to delete, click **Select**, and select **Load Summary View** or **Load Detail View**.

Rec. No	Date	Amount	Check #	Type	Unapplied	Refunded
93	02/10/2005	30.00		Check	.00	.00
92	01/19/2005	100.00		Cash	100.00	.00
91	01/19/2005	10.00		Cash	10.00	.00
90	01/17/2005	10.00		Cash	.00	.00
87	01/17/2005	100.00		Cash	.00	.00
86	01/14/2005	10.00		Cash	.00	10.00
69	02/12/2002	75.00		Cash	.00	.00

The receipt information and fee slip charges paid by the receipt appear in the Receipts & Adjustments window.

- 4 Click **Delete**.

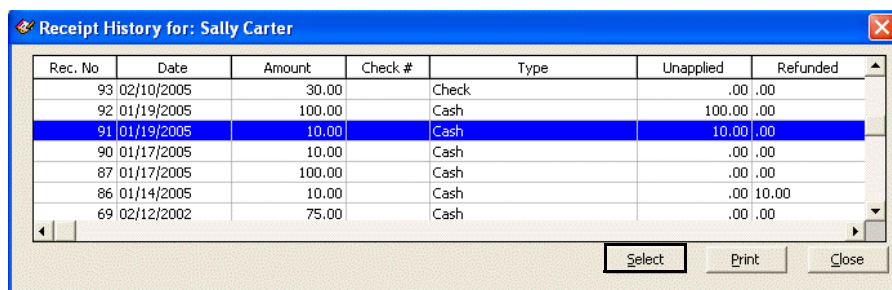
Date	Slip #	Patient	Code/Name	Open	Payment	Balance	Refund
06/01/2005	95	Anna Ahle	IRLOCK 760/1	214.99	214.99	.00	

The **Delete Warning** message appears.

- 5 Click **Yes** to delete the payment receipt.

► To modify recorded payments

- 1 Open a patient's receipts and adjustments. For more information on opening a patient's receipts and adjustments, go to [Opening a Patient's Receipts & Adjustments on page 245](#).
- 2 Click **History**.
The **Receipt History** window opens.
- 3 Select the payment receipt you want to modify, click **Select**, and select **Load Summary View** or **Load Detail View**.



Rec. No	Date	Amount	Check #	Type	Unapplied	Refunded
93	02/10/2005	30.00		Check	.00	.00
92	01/19/2005	100.00		Cash	100.00	.00
91	01/19/2005	10.00		Cash	10.00	.00
90	01/17/2005	10.00		Cash	.00	.00
87	01/17/2005	100.00		Cash	.00	.00
86	01/14/2005	10.00		Cash	.00	10.00
69	02/12/2002	75.00		Cash	.00	.00

The receipt information and fee slip charges paid by the receipt appear in the Receipts & Adjustments window.

- 4 Modify the amount paid, method of payment, the way the payment was applied; or, adjust the charges on the receipt. For more information, go to [To apply payments to patient receivables on page 246](#) and [Adjusting Charges on page 272](#).

► To pay open items with credit amounts

Go to [To pay open items with credit amounts on page 250](#).

CHAPTER 9

Using the Patient Ledger

In this chapter:

For more information on using the ledger, see the “[OSSU 402 Using Patient Ledger](#)” iTrain.

- [Opening a Patient’s Ledger, 295](#)
- [Viewing, Editing, & Creating Fee Slips, 297](#)
- [Viewing & Modifying Receipts, 300](#)
- [Returning Products, 303](#)
- [Adjusting Charges, 305](#)
- [Adding Additional Data to Fee Slip Line Items, 306](#)
- [Refunding Patient Credits, 307](#)
- [Printing the Patient Ledger, 309](#)
- [Viewing & Printing Statements, 310](#)

After you create and record fee slips and apply payments from patients and insurance companies, you can use the Patient Ledger to view all of a patient’s fee slips in summary or detail. You can also edit fee slips, return products, and make adjustments to fee slip charges.

Opening a Patient’s Ledger

- 1 Open the Patient Ledger window using one of the following methods:
 - Click the **Ledger** icon.
 - Click **Tasks** on the main window toolbar and select **Patient Ledger**.
 - Right-click on the Patient Demographic, Hard Lens Order, Soft Lens Order, Eyewear Order, Fee Slip, or Receipts & Adjustments window title bar and select **Ledger**.
 - Right-click on a patient in the OfficeMate Information Center window and select **Ledger**.
 - Click on a patient’s name in the OfficeMate Information Center window and drag and drop the patient on the **Ledger** icon.

- 2 Select the **Open Only** check box if you only want to view charges that are unpaid.
- 3 Select the **All With Same Guarantor** check box to view information on all of the guarantor's linked family members.
- 4 Enter search information in the **Last Name** and **First** text boxes and click **F2 Find** to find and select a patient.
- 5 Click the **Patient, Insurance, Patient/Insurance, or Patient Receipt History** tab.
- 6 Click **Details** to view the patient's fee slip item details or click **Summary** to view a summary of the patient's fee slips.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB: 10/08/1956

Last Name: Carter First: Sally F2 Find ☐ Open Only ☒ All same guarantor Pat # 3 Summary Details Chart # 78958

Patient Insurance Patient/Insurance Patient Receipt History

Fee Slip #	Posting Date	Tot Chrg	Pat Chrg	Pat Pmt	Pat Adj	Pat Bal	Ins Chrg	Ins Pmt	Ins Adj	Ins Bal	Tot Bal	Patient Name																																																																																				
96	04/20/2006	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Sally Carter																																																																																				
<div> <input type="checkbox"/> DNP <table border="1"> <thead> <tr> <th>Posting Date</th> <th>Description</th> <th>Reference</th> <th>Pat Amount</th> <th>Ins Amount</th> <th>Item Balance</th> </tr> </thead> <tbody> <tr> <td>04/20/2006</td> <td>A4262</td> <td></td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table> </div>													Posting Date	Description	Reference	Pat Amount	Ins Amount	Item Balance	04/20/2006	A4262		0.00	0.00	0.00																																																																								
Posting Date	Description	Reference	Pat Amount	Ins Amount	Item Balance																																																																																											
04/20/2006	A4262		0.00	0.00	0.00																																																																																											
95	03/24/2006	0.00	6.00	-20.00	20.00	6.00	-6.00	20.00	10.00	24.00	30.00	Sally Carter																																																																																				
<div> <input type="checkbox"/> DNP <table border="1"> <thead> <tr> <th>Posting Date</th> <th>Description</th> <th>Reference</th> <th>Pat Amount</th> <th>Ins Amount</th> <th>Item Balance</th> </tr> </thead> <tbody> <tr> <td>03/24/2006</td> <td>Multipack Acuvue Lenses</td> <td>Vision Service Plan</td> <td>0.00</td> <td>30.00</td> <td>0.00</td> </tr> <tr> <td>05/11/2006</td> <td>Insurance Payment</td> <td>Check#: 5465</td> <td>0.00</td> <td>-20.00</td> <td></td> </tr> <tr> <td>05/12/2006</td> <td>Insurance Overpayment</td> <td>[I] (ADJ)-Vision Service Plan</td> <td>0.00</td> <td>20.00</td> <td></td> </tr> <tr> <td>05/12/2006</td> <td>Insurance Overpayment</td> <td>[I] (ADJ)-Vision Service Plan</td> <td>0.00</td> <td>10.00</td> <td></td> </tr> <tr> <td>05/16/2006</td> <td>Insurance Payment</td> <td>Check#</td> <td>0.00</td> <td>-20.00</td> <td></td> </tr> <tr> <td>05/16/2006</td> <td>Transfer from Insurance to</td> <td>[I] Vision Service Plan -</td> <td>0.00</td> <td>-20.00</td> <td></td> </tr> <tr> <td>05/16/2006</td> <td>Transfer from Insurance to</td> <td>[P] Vision Service Plan -</td> <td>20.00</td> <td>0.00</td> <td></td> </tr> <tr> <td>05/17/2006</td> <td>Patient Payment</td> <td>Cash</td> <td>-20.00</td> <td>0.00</td> <td></td> </tr> <tr> <td>03/24/2006</td> <td>Multipack Acuvue Lenses</td> <td>Medicare</td> <td>6.00</td> <td>24.00</td> <td>30.00</td> </tr> <tr> <td>05/11/2006</td> <td>Insurance Charge Back</td> <td>Medicare</td> <td>0.00</td> <td>-30.00</td> <td>0.00</td> </tr> <tr> <td>05/11/2006</td> <td>Insurance Payment</td> <td>Check#</td> <td>0.00</td> <td>30.00</td> <td></td> </tr> <tr> <td>05/11/2006</td> <td>Insurance Charge Back</td> <td>Vision Service Plan</td> <td>0.00</td> <td>-30.00</td> <td>0.00</td> </tr> <tr> <td>05/11/2006</td> <td>Insurance Payment</td> <td>Check#</td> <td>0.00</td> <td>30.00</td> <td></td> </tr> </tbody> </table> </div>													Posting Date	Description	Reference	Pat Amount	Ins Amount	Item Balance	03/24/2006	Multipack Acuvue Lenses	Vision Service Plan	0.00	30.00	0.00	05/11/2006	Insurance Payment	Check#: 5465	0.00	-20.00		05/12/2006	Insurance Overpayment	[I] (ADJ)-Vision Service Plan	0.00	20.00		05/12/2006	Insurance Overpayment	[I] (ADJ)-Vision Service Plan	0.00	10.00		05/16/2006	Insurance Payment	Check#	0.00	-20.00		05/16/2006	Transfer from Insurance to	[I] Vision Service Plan -	0.00	-20.00		05/16/2006	Transfer from Insurance to	[P] Vision Service Plan -	20.00	0.00		05/17/2006	Patient Payment	Cash	-20.00	0.00		03/24/2006	Multipack Acuvue Lenses	Medicare	6.00	24.00	30.00	05/11/2006	Insurance Charge Back	Medicare	0.00	-30.00	0.00	05/11/2006	Insurance Payment	Check#	0.00	30.00		05/11/2006	Insurance Charge Back	Vision Service Plan	0.00	-30.00	0.00	05/11/2006	Insurance Payment	Check#	0.00	30.00	
Posting Date	Description	Reference	Pat Amount	Ins Amount	Item Balance																																																																																											
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05/16/2006	Transfer from Insurance to	[I] Vision Service Plan -	0.00	-20.00																																																																																												
05/16/2006	Transfer from Insurance to	[P] Vision Service Plan -	20.00	0.00																																																																																												
05/17/2006	Patient Payment	Cash	-20.00	0.00																																																																																												
03/24/2006	Multipack Acuvue Lenses	Medicare	6.00	24.00	30.00																																																																																											
05/11/2006	Insurance Charge Back	Medicare	0.00	-30.00	0.00																																																																																											
05/11/2006	Insurance Payment	Check#	0.00	30.00																																																																																												
05/11/2006	Insurance Charge Back	Vision Service Plan	0.00	-30.00	0.00																																																																																											
05/11/2006	Insurance Payment	Check#	0.00	30.00																																																																																												

Credit 16.00 Total Chrg 4075.06 Pat Chrg 3942.66 Pat Pmt -2554.23 Pat Adj -19.58 Pat Bal 1368.85 Ins Chrg 132.40 Ins Pmt 10.00 Ins Adj -118.40 Ins Bal 24.00 Balance 1392.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

Notes

- The color-coded hierarchical grids in the Patient Ledger window displays red text for open items, blue text for fee slip line items, and green backgrounds for payments.
- Click the + (plus) or - (minus) sign next to a fee slip to view or hide the fee slip's line items.
- Click on column headings to sort the summary and detail grids.
- A [P] in the Reference column in the Patient/Insurance tab denotes a patient adjustment or return.
- An [I] in the Reference column in the Patient/Insurance tab denotes an insurance adjustment or return.
- DNP (Do Not Print) check boxes display items that will not be printed on the Statements report.

Viewing, Editing, & Creating Fee Slips

This section tells you how to view, edit, and create fee slips from the Patient Ledger window, including how

- To view fee slips, 297
- To edit fee slips, 298
- To create fee slips, 300

► To view fee slips

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Select a fee slip and click **View Slip** or right click on the fee slip in the Patient, Insurance, or Patient/Insurance tab and select **View Slip**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB: 10/08/1956

Last Name: Carter First: Sally F2 Find Open Only ☒ All same guarantor Pat # 3 Summary Details

Chart # 78958

Patient	Insurance	Patient/Insurance	Patient Receipt History			
Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter
006		225.00	-25.00	0.00	200.00	Sally Carter
006		190.00	0.00	0.00	190.00	Sally Carter
006		26.99	0.00	62.96	89.95	Sally Carter
006		56.50	0.00	56.49	112.99	Sally Carter
90	03/16/2006	170.04	0.00	8.95	178.99	Sally Carter
88	03/13/2006	545.00	-120.00	0.00	425.00	Sally Carter
83	03/06/2006	0.00	0.00	0.00	0.00	Sally Carter
82	03/06/2006	230.08	-65.00	0.00	165.08	Sally Carter
80	03/01/2006	112.99	-112.15	0.00	0.84	Sally Carter
79	03/01/2006	50.00	-50.00	0.00	0.00	Sally Carter
68	08/21/2002	480.85	-435.85	-45.00	0.00	Harper Cole
65	02/12/2002	75.00	-75.00	0.00	0.00	Sally Carter
57	04/02/2001	480.85	-480.85	0.00	0.00	Harper Cole
51	03/09/2000	75.00	-75.00	0.00	0.00	Harper Cole
48	03/09/2000	0.00	0.00	0.00	0.00	Sally Carter
33	06/10/1999	107.00	-107.00	0.00	0.00	Harper Cole

Credit 16.00 Balance 1368.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

The **OfficeMate Fee Slip** window opens.

Note

Click the **Print** icon to print the fee slip or click the **Export** icon to export the fee slip to another destination.

► To edit fee slips

You can edit fee slip charges, delete fee slip charges, and void fee slips using the instructions in this section.

Notes

- If you edit or delete a fee slip charge using the Edit Slip button in the Patient Ledger window, an audit trail will not be visible in the Patient Ledger window; instead, view the transactions in the Daily Transaction Audit report. For more information on the Daily Transaction Audit report, go to [Daily Transaction Audit on page 414](#).
- Payments recorded on deleted fee slip charges are added to the patient's credit balance.
- Do not edit a fee slip if you adjusted an item on the fee slip, transferred a balance, or used an insurance write-off; instead, void the fee slip and create a new fee slip with the correct items.
- You can change the provider in a fee slip that has been recorded by changing each line item's provider. Simply changing the provider name in the Provider box will not affect the transaction's monetary distribution.
- If you reduce a fee slip charge with a previous recorded payment that causes the original payment to be more than the amount of the fee slip, the excess amount is transferred to the patient's unapplied balance. When the patient has new charges, the unapplied amount can be used to pay the new charges. The unapplied amount can also be refunded to the patient.
- If you increase a fee slip charge and the fee amount is higher than the original payment, the fee slip will have an open balance.

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).

- 2 Select a fee slip and click **Edit Slip** or right click on the fee slip in the Patient, Insurance, or Patient/Insurance tab and select **Edit Slip**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB: 10/08/1956

Last Name: Carter First: Sally F2 Find Open Only ☒ All same guarantor Pat # 3 Summary Details Chart # 78958

Patient		Insurance		Patient/Insurance		Patient Receipt History	
Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name	
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter	
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter	
94	03/23/2006	225.00	-25.00	0.00	200.00	Sally Carter	
93	03/21/2006		0.00	0.00	190.00	Sally Carter	
92	03/20/2006		0.00	62.96	89.95	Sally Carter	
91	03/16/2006		0.00	56.49	112.99	Sally Carter	
90	03/16/2006		0.00	8.95	178.99	Sally Carter	
88	03/13/2006	545.00	-120.00	0.00	425.00	Sally Carter	
83	03/06/2006	0.00	0.00	0.00	0.00	Sally Carter	
82	03/06/2006	230.08	-65.00	0.00	165.08	Sally Carter	
80	03/01/2006	112.99	-112.15	0.00	0.84	Sally Carter	
79	03/01/2006	50.00	-50.00	0.00	0.00	Sally Carter	
68	08/21/2002	480.85	-435.85	-45.00	0.00	Harper Cole	
65	02/12/2002	75.00	-75.00	0.00	0.00	Sally Carter	
57	04/02/2001	480.85	-480.85	0.00	0.00	Harper Cole	
51	03/09/2000	75.00	-75.00	0.00	0.00	Harper Cole	
48	03/09/2000	0.00	0.00	0.00	0.00	Sally Carter	
33	06/10/1999	107.00	-107.00	0.00	0.00	Harper Cole	

Credit 16.00 Balance 1368.85

View Slip New Slip Receipts Adjustment Returns **Edit Slip** Print Statement

The **Fee Slip** window opens.

- 3 Edit the fee slip using the instructions in [Recording Information on Fee Slips on page 193](#).

► To create fee slips

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Select a fee slip and click **New Slip** or right click on the fee slip in the Patient, Insurance, or Patient/Insurance tab and select **New Slip**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB:10/08/1956

Last Name: Carter First: Sally F2 Find Open Only All same guarantor Pat # 3 Chart # 78958

Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter
94	03/23/2006	225.00	-25.00	0.00	200.00	Sally Carter
93	03/21/2006	190.00	0.00	0.00	190.00	Sally Carter
92	03/21/2006	26.99	0.00	62.96	89.95	Sally Carter
91	03/11/2006	56.50	0.00	56.49	112.99	Sally Carter
90	03/11/2006	170.04	0.00	8.95	178.99	Sally Carter
88	03/11/2006	545.00	-120.00	0.00	425.00	Sally Carter
83	03/06/2006	0.00	0.00	0.00	0.00	Sally Carter
82	03/06/2006	230.08	-65.00	0.00	165.08	Sally Carter
80	03/01/2006	112.99	-112.15	0.00	0.84	Sally Carter
79	03/01/2006	50.00	-50.00	0.00	0.00	Sally Carter
68	08/21/2002	480.85	-435.85	-45.00	0.00	Harper Cole
65	02/12/2002	75.00	-75.00	0.00	0.00	Sally Carter
57	04/02/2001	480.85	-480.85	0.00	0.00	Harper Cole
51	03/09/2000	75.00	-75.00	0.00	0.00	Harper Cole
48	03/09/2000	0.00	0.00	0.00	0.00	Sally Carter
33	06/10/1999	107.00	-107.00	0.00	0.00	Harper Cole

Credit 16.00 Balance 1368.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

The **Fee Slip** window opens.

- 3 Create a new fee slip using the instructions in [Recording Information on Fee Slips on page 193](#).

Viewing & Modifying Receipts

This section tells you how to view and modify receipts in the Patient Ledger window, including how

- To view receipts, 300
- To modify payments on receipts, 301
- To pay open items with credit amounts, 302

► To view receipts

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).

- 2 Select a fee slip and click **Receipts** or right click on the fee slip in the Patient, Insurance, or Patient/Insurance tab and select **Receipts**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB:10/08/1956

Last Name: Carter First: Sally F2 Find Open Only All same guarantor Pat # 3 Summary Details Chart # 78958

Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter
94	03/23	225.00	-25.00	0.00	200.00	Sally Carter
93	03/21	190.00	0.00	0.00	190.00	Sally Carter
92	03/20	26.99	0.00	62.96	89.95	Sally Carter
91	03/16	56.50	0.00	56.49	112.99	Sally Carter
90	03/16/2006	170.04	0.00	8.95	178.99	Sally Carter
88	03/13/2006	545.00	-120.00	0.00	425.00	Sally Carter
83	03/06/2006	0.00	0.00	0.00	0.00	Sally Carter
82	03/06/2006	230.08	-65.00	0.00	165.08	Sally Carter
80	03/01/2006	112.99	-112.15	0.00	0.84	Sally Carter
79	03/01/2006	50.00	-50.00	0.00	0.00	Sally Carter
68	08/21/2002	480.85	-435.85	-45.00	0.00	Harper Cole
65	02/12/2002	75.00	-75.00	0.00	0.00	Sally Carter
57	04/02/2001	480.85	-480.85	0.00	0.00	Harper Cole
51	03/09/2000	75.00	-75.00	0.00	0.00	Harper Cole
48	03/09/2000	0.00	0.00	0.00	0.00	Sally Carter
33	06/10/1999	107.00	-107.00	0.00	0.00	Harper Cole

Credit 16.00 Balance 1368.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

The **Receipts & Adjustments** window opens.

► To modify payments on receipts

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Select a fee slip and click **Receipts** or right click on the fee slip in the Patient, Insurance, or Patient/Insurance tab and select **Receipts**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB:10/08/1956

Last Name: Carter First: Sally F2 Find Open Only All same guarantor Pat # 3 Summary Details Chart # 78958

Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter
94	03/23	225.00	-25.00	0.00	200.00	Sally Carter
93	03/21	190.00	0.00	0.00	190.00	Sally Carter
92	03/20	26.99	0.00	62.96	89.95	Sally Carter
91	03/16	56.50	0.00	56.49	112.99	Sally Carter
90	03/16/2006	170.04	0.00	8.95	178.99	Sally Carter
88	03/13/2006	545.00	-120.00	0.00	425.00	Sally Carter
83	03/06/2006	0.00	0.00	0.00	0.00	Sally Carter
82	03/06/2006	230.08	-65.00	0.00	165.08	Sally Carter
80	03/01/2006	112.99	-112.15	0.00	0.84	Sally Carter
79	03/01/2006	50.00	-50.00	0.00	0.00	Sally Carter
68	08/21/2002	480.85	-435.85	-45.00	0.00	Harper Cole
65	02/12/2002	75.00	-75.00	0.00	0.00	Sally Carter
57	04/02/2001	480.85	-480.85	0.00	0.00	Harper Cole
51	03/09/2000	75.00	-75.00	0.00	0.00	Harper Cole
48	03/09/2000	0.00	0.00	0.00	0.00	Sally Carter
33	06/10/1999	107.00	-107.00	0.00	0.00	Harper Cole

Credit 16.00 Balance 1368.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

The **Receipts & Adjustments** window opens.

- 3 Modify payments using the instructions in [Applying Payments to Patient Receivables on page 246](#), [Applying Insurance Payments to Open Balances on page 254](#), or [Modifying Payments Using the Receipt History on page 291](#).

► To pay open items with credit amounts

Note

Automatically apply unapplied patient amounts from fee slips to new fee slip charges in the Fee Slip window by selecting the **Yes** radio button next to the Apply patient unapplied amount from fee slip other system preference. For more information on modifying other system preferences, go to [To define and change other preferences on page 69](#).

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Select a fee slip and click **Receipts** or right click on the fee slip in the Patient, Insurance, or Patient/Insurance tab and select **Receipts**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB: 10/08/1956

Last Name: Carter First: Sally F2 Find Open Only All same guarantor Pat # 3 Summary Details Chart # 78958

Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter
94	03/23/2006	225.00	-25.00	0.00	200.00	Sally Carter
93	03/21/2006	190.00	0.00	0.00	190.00	Sally Carter
92	03/20/2006	26.99	0.00	62.96	89.95	Sally Carter
91	03/16/2006	56.50	0.00	56.49	112.99	Sally Carter
90	03/16/2006	170.04	0.00	8.95	178.99	Sally Carter
88	03/13/2006	545.00	-120.00	0.00	425.00	Sally Carter
83	03/06/2006	0.00	0.00	0.00	0.00	Sally Carter
82	03/06/2006	230.08	-65.00	0.00	165.08	Sally Carter
80	03/01/2006	112.99	-112.15	0.00	0.84	Sally Carter
79	03/01/2006	50.00	-50.00	0.00	0.00	Sally Carter
68	08/21/2002	480.85	-435.85	-45.00	0.00	Harper Cole
65	02/12/2002	75.00	-75.00	0.00	0.00	Sally Carter
57	04/02/2001	480.85	-480.85	0.00	0.00	Harper Cole
51	03/09/2000	75.00	-75.00	0.00	0.00	Harper Cole
48	03/09/2000	0.00	0.00	0.00	0.00	Sally Carter
33	06/10/1999	107.00	-107.00	0.00	0.00	Harper Cole

Credit: 16.00 Balance: 1368.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

The **Receipts & Adjustments** window opens.

- 3 Pay the open item with a credit amount using the instructions in [To pay open items with credit amounts on page 250](#).

Returning Products

For more information on returning products, see the “OSSU 402 Using Patient Ledger” iTrain.

- 1 Open the Fee Slip Item Return window using one of the following methods:
 - Open a patient’s ledger. For more information on opening a patient’s ledger, go to [Opening a Patient’s Ledger on page 295](#). Select a fee slip, fee slip line item, or product refund line and click **Returns** or right-click on a fee slip or product refund line in the Patient or Patient/Insurance tab and select **Returns** or **Return Item**.
 - Click **Tasks** on the main window toolbar and select **Return Product**. Type a fee slip number in the **Fee Slip #** text box and click **Get Slip**.

Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter
95	03/24/2006		-20.00	20.00	6.00	Sally Carter
94	03/23/2006		-25.00	0.00	200.00	Sally Carter
93	03/21/2006		0.00	0.00	190.00	Sally Carter
92	03/20/2006		0.00	62.96	89.95	Sally Carter
91	03/16/2006	56.50	0.00	56.49	112.99	Sally Carter
90	03/16/2006	170.04	0.00	8.95	178.99	Sally Carter
88	03/13/2006	545.00	-120.00	0.00	425.00	Sally Carter
83	03/06/2006	0.00	0.00	0.00	0.00	Sally Carter
82	03/06/2006	230.08	-65.00	0.00	165.08	Sally Carter
80	03/01/2006	112.99	-112.15	0.00	0.84	Sally Carter
79	03/01/2006	50.00	-50.00	0.00	0.00	Sally Carter
68	08/21/2002	480.85	-435.85	-45.00	0.00	Harper Cole
65	02/12/2002	75.00	-75.00	0.00	0.00	Sally Carter
57	04/02/2001	480.85	-480.85	0.00	0.00	Harper Cole
51	03/09/2000	75.00	-75.00	0.00	0.00	Harper Cole
48	03/09/2000	0.00	0.00	0.00	0.00	Sally Carter
33	06/10/1999	107.00	-107.00	0.00	0.00	Harper Cole

Credit: 16.00 Balance: 1368.85

View Slip New Slip Receipts Adjustment **Returns** Edit Slip Print Statement

Note

Type a fee slip number in the **Fee Slip #** text box and click **Get Slip** to view other fee slips for the patient, if available.

- 2 Select a product from the **Product Returned** drop-down menu.
- 3 Select a reason for the return from the **Reason for Return** drop-down menu.
- 4 Select the person recording the transaction from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).

- 5 Select the **Do NOT update Inventory** check box to return a product without adding it back into an inventory list.

Fee Slip Item Return for: Sally Carter

Product Returned: Accuflex 225 Fee Slip No: 11 **Get Slip**

Qty Returned: 1 Date Returned: 01/17/2005 Reason for Return: Can't use Recorded by: Franklin, Helen

☐ Do NOT update Inventory

Patient Information

Patient Charge	217.43
Patient Return	217.43
Patient Payment	217.43
Patient Refund	217.43
Patient Balance	0.00

Insurance Information

Insurance Charge	.00
Insurance Return	.00
Insurance Payment	.00
Insurance Refund	.00

NOTE: All Insurance Refunds are On Account.

☐ Apply Refund to Patient (On Account)

Non-Refundable Amount: 0.00 Reason:

Patient Refund Method

☐ On Account ☐ Check ☐ Cash ☐ Other

Type: Check #:

Comments

Record **Cancel**

- 6 If there is a non-refundable amount for this product, type the amount in the **Non-Refundable Amount** text box and select a reason for not refunding the entire amount from the **Reason** drop-down menu.

Note

You can record a non-refundable amount even if the patient has not made a payment. This record creates a patient balance for a non-refundable amount and displays an amount in the Adjustment column in the Patient Ledger window.

- 7 Select the patient refund method.
 - If you select the Check radio button, type the check number in the **Check #** text box.
 - If you select the Other radio button, select a refund type from the **Type** drop-down menu.

Notes

- If you select the On Account radio button, the amount returned is added to the patient's credit balance.
- You can record a check number after you refund an amount.

- 8 If you are applying a refunded insurance amount to a patient credit, select the **Apply Refund to Patient (On Account)** check box.
- 9 Type comments in the **Comments** box, if necessary.
- 10 Click **Record**.

Adjusting Charges

All adjustments are displayed in the Patient Ledger window and provide a complete transaction history of the changes made to fee slips. This section tells you how to adjust charges, including how

- [To adjust charges, 305](#)

► To adjust charges

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Click **Details**.
- 3 Select a blue fee slip line item or non-product line and click **Adjustment** or right click on a fee slip line item or non-product line in the Patient, Patient/Insurance, or Insurance tab and select **Adjustments**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB: 10/08/1956

Last Name: Carter First: Sally F2 Find Open Only All same guarantor Pat # 3 Summary Details Chart # 78958

Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name																																										
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter																																										
<table border="1"> <thead> <tr> <th>DNP</th> <th>Posting Date</th> <th>Description</th> <th>Reference</th> <th>Amount</th> <th>Item Balance</th> </tr> </thead> <tbody> <tr> <td></td> <td>04/20/2006</td> <td>A4262</td> <td></td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>							DNP	Posting Date	Description	Reference	Amount	Item Balance		04/20/2006	A4262		0.00	0.00																														
DNP	Posting Date	Description	Reference	Amount	Item Balance																																											
	04/20/2006	A4262		0.00	0.00																																											
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter																																										
<table border="1"> <thead> <tr> <th>DNP</th> <th>Posting Date</th> <th>Description</th> <th>Reference</th> <th>Amount</th> <th>Item Balance</th> </tr> </thead> <tbody> <tr> <td></td> <td>03/24/2006</td> <td>Multipack Acuvue Lenses</td> <td></td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td></td> <td>05/16/2006</td> <td>Transfer from Insurance to Patient</td> <td>Vision Service Plan - Global Transfer</td> <td>20.00</td> <td></td> </tr> <tr> <td></td> <td>05/17/2006</td> <td>Patient Payment</td> <td>Cash</td> <td>-20.00</td> <td></td> </tr> <tr> <td></td> <td>03/24/2006</td> <td>Multipack Acuvue Lenses</td> <td></td> <td>6.00</td> <td>6.00</td> </tr> <tr> <td></td> <td>05/11/2006</td> <td>Insurance Charge Back</td> <td></td> <td>0.00</td> <td>0.00</td> </tr> <tr> <td></td> <td>05/11/2006</td> <td>Return Item</td> <td></td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>							DNP	Posting Date	Description	Reference	Amount	Item Balance		03/24/2006	Multipack Acuvue Lenses		0.00	0.00		05/16/2006	Transfer from Insurance to Patient	Vision Service Plan - Global Transfer	20.00			05/17/2006	Patient Payment	Cash	-20.00			03/24/2006	Multipack Acuvue Lenses		6.00	6.00		05/11/2006	Insurance Charge Back		0.00	0.00		05/11/2006	Return Item		0.00	0.00
DNP	Posting Date	Description	Reference	Amount	Item Balance																																											
	03/24/2006	Multipack Acuvue Lenses		0.00	0.00																																											
	05/16/2006	Transfer from Insurance to Patient	Vision Service Plan - Global Transfer	20.00																																												
	05/17/2006	Patient Payment	Cash	-20.00																																												
	03/24/2006	Multipack Acuvue Lenses		6.00	6.00																																											
	05/11/2006	Insurance Charge Back		0.00	0.00																																											
	05/11/2006	Return Item		0.00	0.00																																											
94	03/23/2006	Adjustments	-25.00	0.00	200.00	Sally Carter																																										
<table border="1"> <thead> <tr> <th>DNP</th> <th>Posting Date</th> <th>Description</th> <th>Reference</th> <th>Amount</th> <th>Item Balance</th> </tr> </thead> <tbody> <tr> <td></td> <td>03/23/2006</td> <td>92004</td> <td></td> <td>130.00</td> <td>130.00</td> </tr> <tr> <td></td> <td>03/23/2006</td> <td>92012</td> <td></td> <td>65.00</td> <td>65.00</td> </tr> <tr> <td></td> <td>03/23/2006</td> <td>Acuvue</td> <td></td> <td>30.00</td> <td>5.00</td> </tr> <tr> <td></td> <td>05/17/2006</td> <td>Patient Payment</td> <td>Cash</td> <td>-25.00</td> <td></td> </tr> </tbody> </table>							DNP	Posting Date	Description	Reference	Amount	Item Balance		03/23/2006	92004		130.00	130.00		03/23/2006	92012		65.00	65.00		03/23/2006	Acuvue		30.00	5.00		05/17/2006	Patient Payment	Cash	-25.00													
DNP	Posting Date	Description	Reference	Amount	Item Balance																																											
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	03/23/2006	92012		65.00	65.00																																											
	03/23/2006	Acuvue		30.00	5.00																																											
	05/17/2006	Patient Payment	Cash	-25.00																																												

Credit: 16.00 Balance: 1368.85

View Slip New Slip Receipts **Adjustment** Returns Edit Slip Print Statement

The **Fee Slip Item Adjustment** window opens.

- 4 Adjust the charges using the instructions in [Adjusting Charges on page 272](#).

Adding Additional Data to Fee Slip Line Items

If a product does not have a CPT code or if you want to add item modifiers, remove the sales tax, keep the item from printing on the fee slip receipt, or record additional information for an item on the fee slip, follow the instructions in this section.

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Click **Details**.
- 3 Select and right click on a fee slip line item in the Patient, Patient/Insurance, or Insurance tab and select **Line Additional Details**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB:10/08/1956

Last Name: Carter First: Sally F2 Find Open Only All same guarantor Pat # 3 Summary Details Chart # 78958

Fee Slip #	Posting Date	Charges	Payments	Adjustments	Balance	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	Sally Carter
DNP	Posting Date	Description	Reference	Amount	Item Balance	
	04/20/2006	A4262		0.00	0.00	
95	03/24/2006	6.00	-20.00	20.00	6.00	Sally Carter
DNP	Posting Date	Description	Reference	Amount	Item Balance	
	03/24/2006	Multipack Acuvue Lenses		0.00	0.00	
	05/16/2006	Transfer from Insurance to Patient	Vision Service Plan - Global Transfer	20.00		
	05/17/2006	Patient Payment	Cash	-20.00		
	03/24/2006	Multipack Acuvue Lenses		6.00	6.00	
	05/11/2006	Insurance Charge Back		0.00	0.00	
	05/11/2006	Insurance Charge Back	Return Item	0.00	0.00	
94	03/23/2006			0.00	200.00	Sally Carter
DNP	Posting Date	Description	Reference	Amount	Item Balance	
	03/23/2006	92004		130.00	130.00	
	03/23/2006	92012		65.00	65.00	
	03/23/2006	Acuvue		30.00	5.00	
	05/17/2006	Patient Payment	Cash	-25.00		

Credit: 16.00 Balance: 1368.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

The **Fee Slip Item Additional Data** window opens.

- 4 Add additional data using the instructions in [Recording Information on Fee Slips on page 193](#).

Refunding Patient Credits

For more information on refunding patient credits, see the “How To - Refunding Patient Credits” iTrain.

Note

You cannot delete a patient credit after it has been refunded.

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger](#) on page 295.
- 2 Click the **Patient Receipt History** tab.
- 3 Right-click on an item and select **Refund Patient Credit**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB:10/08/1956

Last Name: Carter First: Sally F2 Find Open Only ☒ All same guarantor Pat # 3 Chart # 78958

Patient Insurance Patient/Insurance Patient Receipt History

Rec. No	Date	Amount	Check #	Type	Unapplied	Refunded
101	05/17/2006	25.00		Cash	.00	.00
100	05/17/2006	21.00		Cash	1.00	.00
99	05/17/2006	65.00		Cash	5.00	.00
98	05/17/2006	65.00		Cash	.00	.00
97	05/17/2006	18.00		Cash	.00	.00
95	05/12/2006	50.00		Cash	10.00	10.00
94	05/12/2006	30.00		Cash	.00	.00
93	03/27/2006	200.00		Cash	.00	90.00
92	03/24/2006	150.00		Cash	.00	90.00
91	03/13/2006	20.00		Cash	.00	10.00
90	03/13/2006	10.00		Cash	.00	10.00
89	03/13/2006	50.00		Cash	.00	.00
86	03/01/2006	50.00		Gift Certificate	.00	.00
69	02/12/2002	75.00		Cash	.00	.00
47	03/09/2000	35.00		Check	.00	.00
45	03/09/2000	.00	DELETED	Cash	.00	.00
8	05/19/1999	263.43		Cash	.00	.00
Totals		1127.43			16.00	210.00

Select

Credit 16.00

View Slip New Slip Receipts Adjustment Returns Edit Slip Print Statement

The **Refund Patient Credit** window opens.

- 4 Complete the fields in the **Patient Refund** section.

Refund Patient Credit

Receipt Details

Dep. Date: 01/19/2005 Receipt No: 91

Patient last/First: Carter Sally

Amount Paid: \$10.00 Check #:

Applied Amount: \$0.00 Method: ☐ Check ☒ Cash ☐ Other

Refunded Amount: \$0.00 Type:

Unapplied Amount: \$10.00 Bank #:

Previous Refund Details

Date	Refund Method	Check# / Type	Refund Amount	Reason	Recorded By

Patient Refund

Patient Balance: -\$5.00 Date: 03/14/2005

☒ Check ☐ Cash ☐ Other

Type:

Check #: 25698

Refund Amount: \$10.00

Reason:

Recorded By: Franklin, Helen

Refund Cancel

- 5 Click **Refund**.

The refunded amount appears in the Refunded column on the Receipt History tab and in the Patient Credit Refund report. For more information on the Patient Credit Refund report, go to [Patient Credit Refund](#) on page 448.

Printing the Patient Ledger

- 1 Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- 2 Click **Print**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB: 10/08/1956

Last Name: Carter First: Sally F2 Find Open Only All same guarantor Pat # 3 Summary Details Chart # 78958

Fee Slip #	Posting Date	Tot Chrg	Pat Chrg	Pat Pmt	Pat Adj	Pat Bal	Ins Chrg	Ins Pmt	Ins Adj	Ins Bal	Tot Bal	Patient Name																																																																																																		
96	04/20/2006	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Sally Carter																																																																																																		
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DNP	PostingDate	Description	Reference	Pat Amount	Ins Amount	Item Balance																																																																																																								
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<input type="checkbox"/>	05/11/2006	Insurance Charge Back	Vision Service Plan	0.00	-30.00	0.00																																																																																																								
<input type="checkbox"/>	05/11/2006	Insurance Payment	Check#	0.00	30.00																																																																																																									

Credit: 16.00 Total Chrg: 4075.06 Pat Chrg: 3942.66 Pat Pmt: -2554.23 Pat Adj: -19.58 Pat Bal: 1368.85 Ins Chrg: 132.40 Ins Pmt: 10.00 Ins Adj: -118.40 Ins Bal: 24.00 Balance: 1392.85

View Slip New Slip Receipts Adjustment Returns Edit Slip **Print** Statement

Viewing & Printing Statements

Notes

- You cannot print a statement for a patient if the patient does not have an open balance or if the patient has a bad address, the Send Statement check box selected, or the Sent to Collection check box selected. For more information on selecting and de-selecting the Bad Addr, Send Statement, and Sent to Collection check boxes, go to [To record demographic information on page 83](#) and [To record financial information on page 94](#).
- Statements viewed and printed from the Patient Ledger window display 30 days of details. To display more details, view and print statements from the Reports, Statements & Graphs window. For more information on viewing and printing Statements reports, go to [Creating & Printing Statements on page 390](#).

- Open a patient's ledger. For more information on opening a patient's ledger, go to [Opening a Patient's Ledger on page 295](#).
- Click **Statement**.

Patient Ledger - Patient Name: Sally Carter [ALERT] DOB: 10/08/1956

Last Name: Carter First: Sally F2 Find Open Only ☒ All same guarantor Pat # 3 Summary Details

Chart # 78958

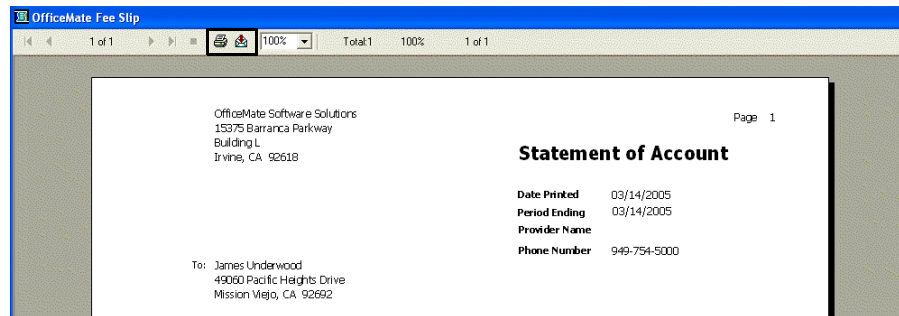
Fee Slip #	Posting Date	Tot Chrg	Pat Chrg	Pat Pmt	Pat Adj	Pat Bal	Ins Chrg	Ins Pmt	Ins Adj	Ins Bal	Tot Bal	Patient Name
96	04/20/2006	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Sally Carter
<p>DNP PostingDate Description Reference Pat Amount Ins Amount Item Balance</p> <p><input type="checkbox"/> 04/20/2006 A4262 0.00 0.00 0.00</p>												
95	03/24/2006	0.00	6.00	-20.00	20.00	6.00	-6.00	20.00	10.00	24.00	30.00	Sally Carter
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Credit 16.00 Total Chrg 4075.06 Pat Chrg 3942.66 Pat Pmt -2554.23 Pat Adj -19.58 Pat Bal 1368.85 Ins Chrg 132.40 Ins Pmt 10.00 Ins Adj -118.40 Ins Bal 24.00 Balance 1392.85

View Slip New Slip Receipts Adjustment Returns Edit Slip Print **Statement**

The **OfficeMate Fee Slip** window opens.

- 3 Click the **Print** icon to print the fee slip or click the **Export** icon to export the fee slip to another destination.



CHAPTER 10

Using FrameMate

In this chapter:

- Opening FrameMate, 313
- Using the FRAMES SPEX UPC CD-ROM, 314
- Using the FRAMES Quarterly CD-ROM, 316
- Using the Marchon Diskette, CD-ROM, & Download Sources, 317
- Transferring & Loading Frames into the OfficeMate Products Database, 320
- Viewing Frame Information, 323
- Deleting Manufacturers, 324

For more information on using the FRAMES Data CD, see the “[OSSU 105 Setting Up Products & Services](#)” iTrain.

FrameMate allows you to use the electronic catalogs available from the FRAMES Data SPEX UPC CD-ROM, FRAMES Data Quarterly CD-ROM, and Marchon Frames Diskette. Use FrameMate to view information about a product and transfer the information into OfficeMate.

Note

Before you transfer frames into OfficeMate, set up your procedure codes. For more information on setting up procedure codes, go to [To add procedure codes on page 45](#).

Opening FrameMate

Open the FrameMate using one of the following methods:

- Click the **Products** icon and select **FrameMate**.
- Click **Tasks** on the main window toolbar and select **FrameMate**

Using the FRAMES SPEX UPC CD-ROM

This section tells you how to use the monthly FRAMES SPEX UPC CD-ROM with FrameMate and OfficeMate, including how

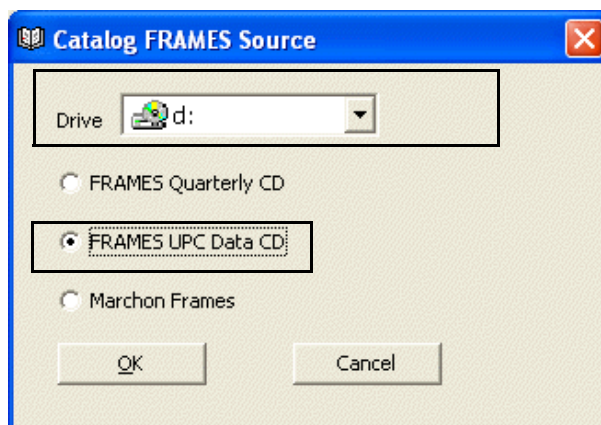
- To open the FRAMES SPEX UPC CD-ROM in FrameMate, 314
- To import manufacturers into FrameMate, 315

Note

If you are looking for information on using the FRAMES Quarterly CD-ROM, go to [Using the FRAMES Quarterly CD-ROM on page 316](#).

► To open the FRAMES SPEX UPC CD-ROM in FrameMate

- 1 Open FrameMate. For more information on opening FrameMate, go to [Opening FrameMate on page 313](#).
- 2 Click **Tasks** and select **Select FRAMES Source**.
The **Catalog FRAMES Source** window opens.
- 3 Insert the FRAMES SPEX UPC CD-ROM into your CD-ROM drive.
- 4 Select your CD-ROM drive from the **Drive** drop-down menu.
- 5 Click the **FRAMES UPC Data CD** radio button.



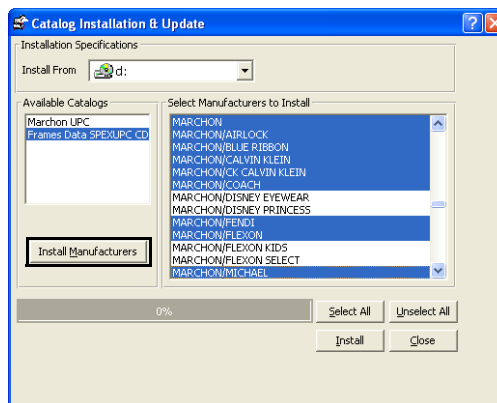
- 6 Click **OK**.
- 7 Import manufacturers into FrameMate. For information on importing manufacturers, go to [To import manufacturers into FrameMate on page 315](#).

► To import manufacturers into FrameMate

Note

You must install manufacturers *every time* you receive and install a new Frames SPEX UPC CD. If you do not install manufacturers every time you install a new Frames SPEX UPC CD, you will not see updated manufacturer information in FrameMate and OfficeMate.

- 1 Open the FRAMES SPEX UPC CD-ROM. For information on opening the SPEX UPC CD-ROM in FrameMate, go to [To open the FRAMES SPEX UPC CD-ROM in FrameMate on page 314](#).
- 2 Click **Tasks** and select **Install Catalog**.
The **Catalog Installation & Update** window opens.
- 3 Select your CD-ROM drive from the **Install From** drop-down menu.
- 4 Select **Frames Data SPEX UPC CD** from the Available Catalogs box.
- 5 Click **Install Manufacturers**.

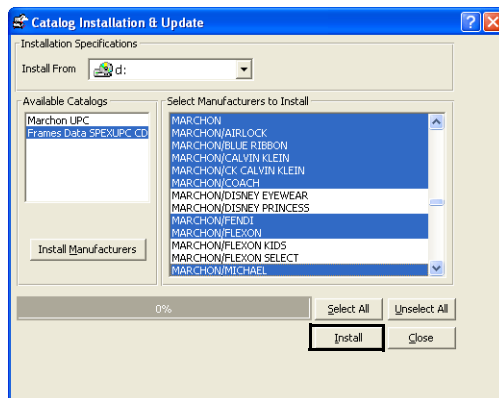


- 6 Click on the manufacturers that you want to install.

Notes

- Click **Select All** to select all of the manufacturers listed.
- Click **Unselect All** to unselect all of the manufacturers that you previously selected.

- 7 Click **Install**.



- 8 Click **Yes** on the Installation Warning window.
The installation begins.
- 9 Click **OK** on the Installation Completed window.
- 10 Transfer product data from the FRAMES SPEX UPC CD-ROM into OfficeMate. For information about transferring product data, go to [Transferring & Loading Frames into the OfficeMate Products Database on page 320](#).

Using the FRAMES Quarterly CD-ROM

This section tells you how to use the FRAMES Quarterly CD-ROM with FrameMate and OfficeMate, including how

- [To open the FRAMES Quarterly CD-ROM in FrameMate, 316](#)

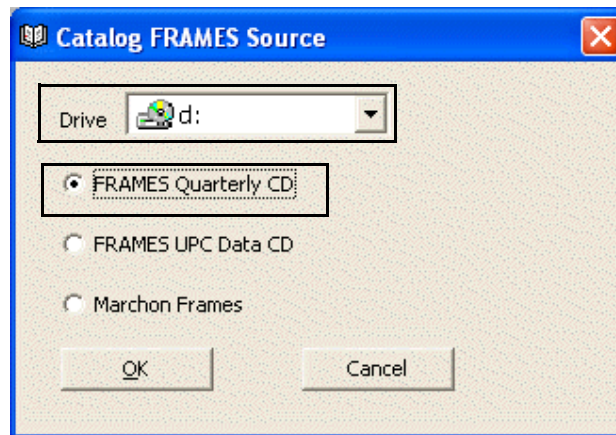
Notes

- If you are looking for information on using the monthly FRAMES SPEX UPC CD-ROM, go to [Using the FRAMES SPEX UPC CD-ROM on page 314](#).
- Unlike the monthly FRAMES SPEX UPC CD-ROM, you are not required to import manufacturers into FrameMate before transferring frames into OfficeMate.

► To open the FRAMES Quarterly CD-ROM in FrameMate

- 1 Open FrameMate. For more information on opening FrameMate, go to [Opening FrameMate on page 313](#).
- 2 Click **Tasks** and select **Select FRAMES Source**.
The **Catalog FRAMES Source** window opens.
- 3 Insert the FRAMES Quarterly CD-ROM into your CD-ROM drive.
- 4 Select your CD-ROM drive from the **Drive** drop-down menu.

- 5 Click the **FRAMES Quarterly CD** radio button.



- 6 Click **OK**.
- 7 Transfer product data from the FRAMES Quarterly CD-ROM into OfficeMate. For information about transferring product data, go to [Transferring & Loading Frames into the OfficeMate Products Database on page 320](#).

Using the Marchon Diskette, CD-ROM, & Download Sources

This section tells you how to use the monthly FRAMES SPEX UPC CD-ROM with FrameMate and OfficeMate, including how

- [To open the FRAMES SPEX UPC CD-ROM in FrameMate, 314](#)
- [To import manufacturers into FrameMate, 315](#)

Note

If you are using OfficeMate 7.0 or above and you downloaded frames from the Marchon MVP Web site after June 2006, you must use a CD-ROM to transfer the frames into FrameMate. If you downloaded frames from the Marchon MVP Web site before June 2006, you can transfer the frames into FrameMate using a diskette.

► To open the Marchon Diskette & CD-ROM in FrameMate

- 1 Open FrameMate. For more information on opening FrameMate, go to [Opening FrameMate on page 313](#).
- 2 Click **Tasks** and select **Select FRAMES Source**.
The **Catalog FRAMES Source** window opens.

- 3 Complete one of the following tasks:
 - Insert the Marchon Frames diskette into your floppy disk drive.
 - Insert the Marchon Frames CD-ROM into your CD-ROM drive.
 - If you are installing Marchon frames that you have already downloaded to your computer from the Marchon MVP Web site, skip this step and go to step 4.

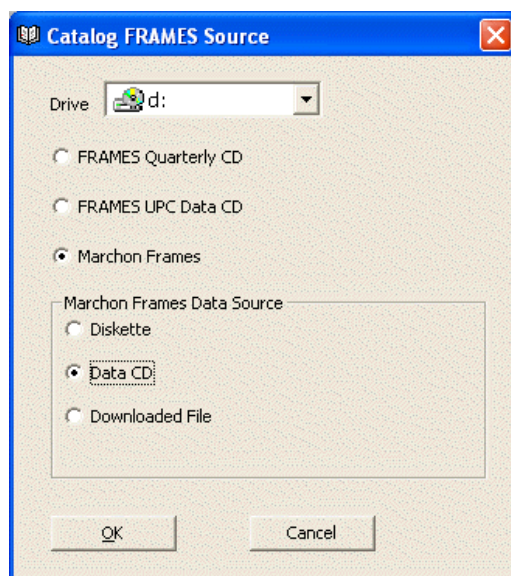
Note

To request a Marchon Frames diskette or CD-ROM, call Marchon Eyewear at 1.800.645.1300 and ask for the Excess Sales Department or e-mail them at excesssales@marchon.com. You can also go to the Marchon MVP Web site at <http://www.marchon1.com/main.nsf/MVPRD?OpenPage>, download the Marchon frames, and copy them on to a floppy disk or CD-ROM or save them on to your computer.

- 4 Select your floppy disk drive, CD-ROM drive, or the drive where you saved your previously downloaded Marchon frames from the **Drive** drop-down menu.
- 5 Select the **Diskette**, **Data CD**, or **Download File** radio button.

Note

If you selected the Download File radio button, navigate to the location where you saved your downloaded Marchon frames.



- 6 Click **OK**.
- 7 Import manufacturers into FrameMate. For information on importing manufacturers, go to [To import manufacturers into FrameMate on page 319](#).

► To import manufacturers into FrameMate

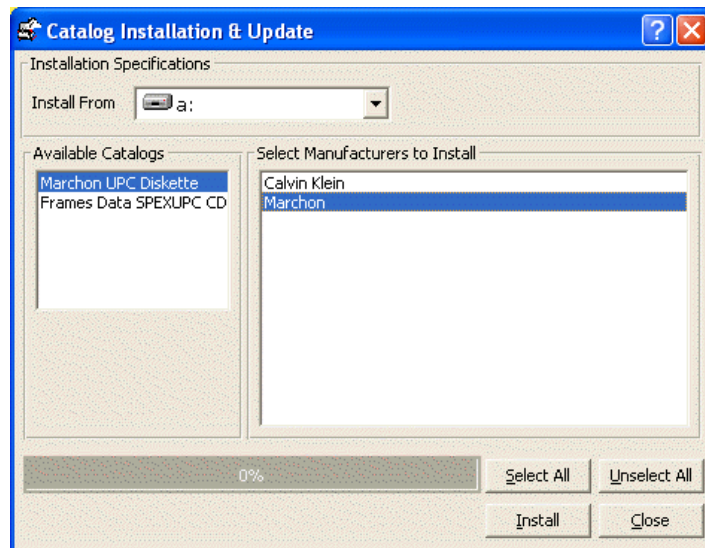
Note

You must install manufacturers *every time* you receive and install a new Marchon diskette or CD. If you do not install manufacturers every time you install a new Marchon Diskette or CD, you will not see updated manufacturer information in FrameMate and OfficeMate.

- 1 Open the Marchon Diskette, CD-ROM, or Downloaded Source. For information, go to [To open the Marchon Diskette & CD-ROM in FrameMate on page 317](#).
- 2 Click **Tasks** and select **Install Catalog**.
The **Catalog Installation & Update** window opens.
- 3 Select your floppy disk drive from the **Install From** drop-down menu.
- 4 Select **Marchon UPC** from the Available Catalogs box.
- 5 Click on the manufacturers that you want to install.

Notes

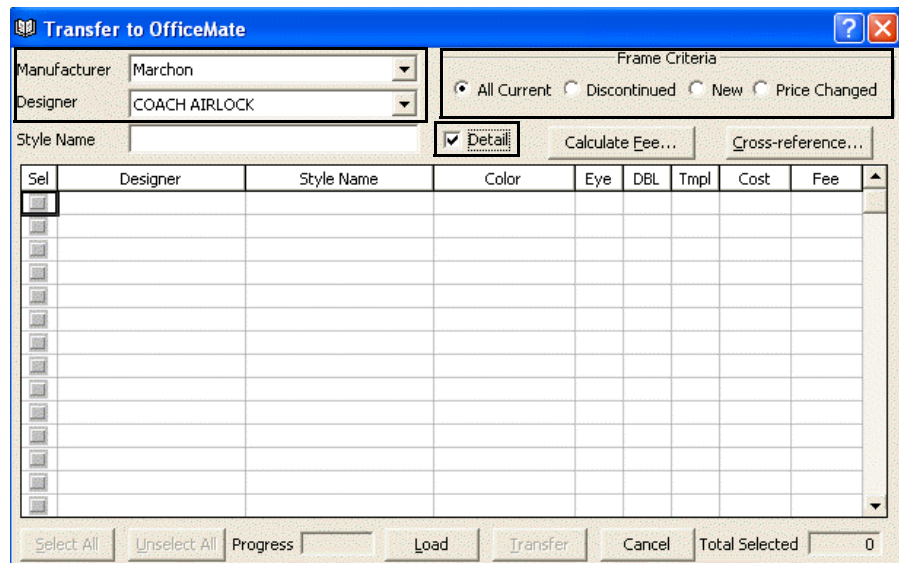
- Click **Select All** to select all of the manufacturers listed.
- Click **Unselect All** to unselect all of the manufacturers that you previously selected.



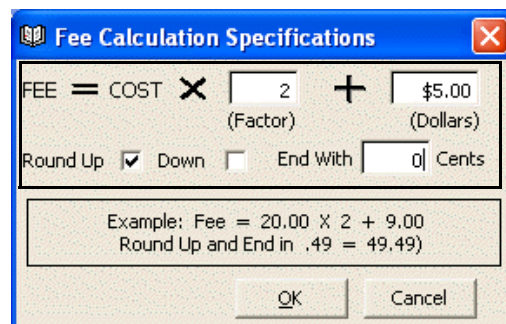
- 6 Click **Install**.
- 7 Click **Yes** on the Installation Warning window.
The installation begins.
- 8 Click **OK** on the Installation Completed window.
- 9 Transfer product data from the Marchon Catalog into OfficeMate. For information about transferring product data, go to [Transferring & Loading Frames into the OfficeMate Products Database on page 320](#).

Transferring & Loading Frames into the OfficeMate Products Database

- 1 Open FrameMate. For more information on opening FrameMate, go to [Opening FrameMate on page 313](#).
- 2 Click **Tasks** and select **Transfer Into OfficeMate**.
The **Transfer to OfficeMate** window opens.
- 3 Select a manufacturer from the **Manufacturer** drop-down menu.
- 4 Select a designer from the **Designer** drop-down menu, if desired.
- 5 Select a **Frame Criteria** radio button.
- 6 Select the **Detail** check box if you want to include eye sizes, colors, and product codes in the transfer.



- 7 Click **Calculate Fee**.
The **Fee Calculation Specifications** window opens.
- 8 Type the markup in the **Factor** text box.
- 9 Type additional markup dollars in the **Dollars** text box.
- 10 Select the **Round Up** or **Down** check box.
- 11 Type the value in the **Cents** text box with which you want the price to end.



- 12 Click **OK**.

- 13 Click **Cross-reference**.

The **Cross-Reference Catalog & OfficeMate Data** window opens if an exact match for the manufacturer selected for transfer cannot be found in the OfficeMate database.

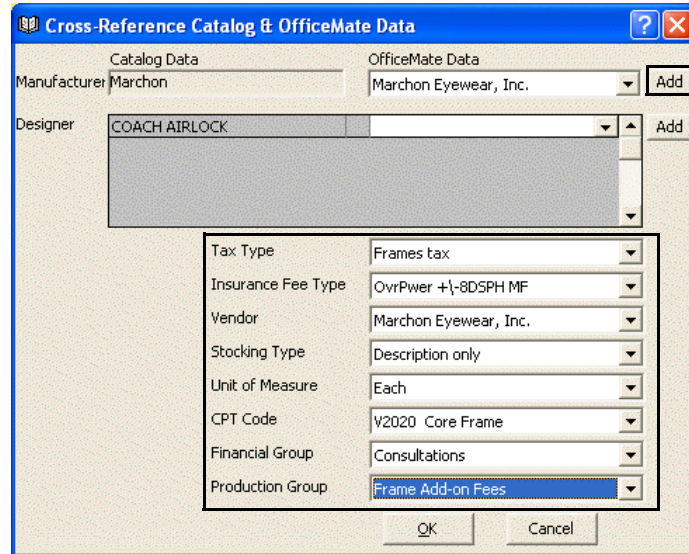
- 14 Click **Add** and then select a manufacturer from the **OfficeMate Data** drop-down menu, if applicable.

Notes

- Use the Cross Reference Catalog & OfficeMate Data window to create new manufacturers in the OfficeMate database, select an existing manufacturer that corresponds to the one you are importing from the FRAMES Data catalog, and assign OfficeMate-specific details to the products you are importing.
- The information that appears under the Catalog Data heading lists the manufacturer and designer(s) you are importing from the FRAMES Data Catalog.
- The information that appears under the OfficeMate Data heading lists the manufacturers, designers, and OfficeMate-specific details from your OfficeMate products database. Use the Add buttons to add new manufacturers or designers.

- 15 Click **Add** and then select designers from the **Designer** drop-down menus, if applicable.

- 16 Select the tax type, insurance fee type, vendor, stocking type, unit of measure, CPT code, financial group (if necessary), and production group (if necessary) from the appropriate drop-down menu.



The dialog box is titled "Cross-Reference Catalog & OfficeMate Data". It has two main sections: "Catalog Data" and "OfficeMate Data".

Catalog Data:

- Manufacturer: Marchon
- Designer: COACH AIRLOCK

OfficeMate Data:

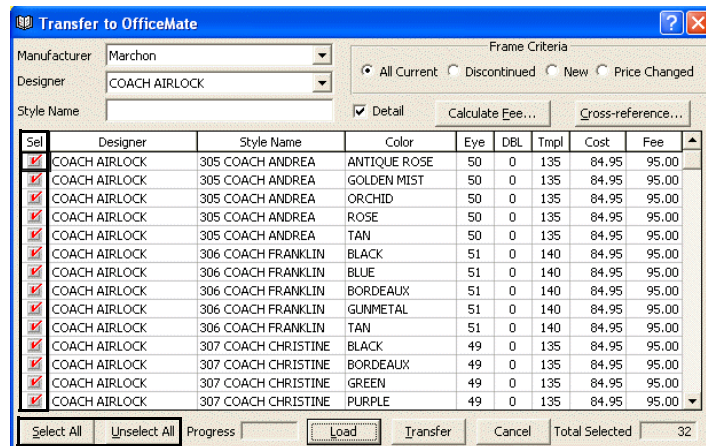
- Manufacturer: Marchon Eyewear, Inc.
- Designer: (empty)

Selections:

- Tax Type: Frames tax
- Insurance Fee Type: OvrPwer +\-8D5PH MF
- Vendor: Marchon Eyewear, Inc.
- Stocking Type: Description only
- Unit of Measure: Each
- CPT Code: V2020 Core Frame
- Financial Group: Consultations
- Production Group: Frame Add-on Fees

Buttons: OK, Cancel

- 17 Click **OK**.
- 18 Click **Load**.
- 19 Select or deselect frames by clicking **Select All**, **Unselect All**, or individually selecting and deselecting **Sel** check boxes.



The dialog box is titled "Transfer to OfficeMate". It has a "Manufacturer" dropdown set to "Marchon" and a "Designer" dropdown set to "COACH AIRLOCK".

Frame Criteria:

- ☒ All Current
- ☐ Discontinued
- ☐ New
- ☐ Price Changed

☒ Detail

Buttons: Calculate Fee..., Cross-reference...

Sel	Designer	Style Name	Color	Eye	DBL	Templ	Cost	Fee
<input checked="" type="checkbox"/>	COACH AIRLOCK	305 COACH ANDREA	ANTIQUE ROSE	50	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	305 COACH ANDREA	GOLDEN MIST	50	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	305 COACH ANDREA	ORCHID	50	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	305 COACH ANDREA	ROSE	50	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	305 COACH ANDREA	TAN	50	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	306 COACH FRANKLIN	BLACK	51	0	140	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	306 COACH FRANKLIN	BLUE	51	0	140	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	306 COACH FRANKLIN	BORDEAUX	51	0	140	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	306 COACH FRANKLIN	GUNMETAL	51	0	140	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	306 COACH FRANKLIN	TAN	51	0	140	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	307 COACH CHRISTINE	BLACK	49	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	307 COACH CHRISTINE	BORDEAUX	49	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	307 COACH CHRISTINE	GREEN	49	0	135	84.95	95.00
<input checked="" type="checkbox"/>	COACH AIRLOCK	307 COACH CHRISTINE	PURPLE	49	0	135	84.95	95.00

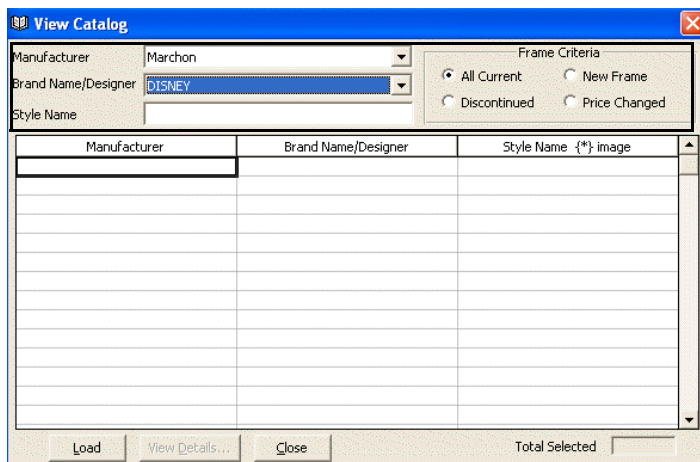
Buttons: Select All, Unselect All, Progress, Load, Transfer, Cancel

Total Selected: 32

- 20 Type fees in the **Fee** text boxes, if applicable.
- 21 Ensure that the OfficeMate **Products** window is closed.
- 22 Click **Transfer**.
- 23 Click **Yes** on the Transfer Warning window.
- 24 Click **OK** when the transfer is complete.
- 25 Repeat these steps 3–24 for each manufacturer and designer that you want to transfer into your OfficeMate Products database.

Viewing Frame Information

- 1 Click **View**.
- 2 Select a manufacturer from the **Manufacturer** drop-down menu.
- 3 Select a brand name or designer from the **Brand Name/Designer** drop-down menu.
- 4 Select one of the **Frame Criteria** radio buttons.
- 5 Click **Load**.



- 6 Double-click on a frame.
- OR
- Select a frame and click **View Details**.

Note

FRAMES Quarterly CD-ROM frame styles with an asterisk include an image. Click on the frame image box to view the image.

The **Frame Style View** window opens.

- 7 View the frame details using one or more of the following methods:
 - Click **List SKUs** to view the stock keeping unit numbers.
 - Click **Price** to open the Price Information window and view price information.
 - Click **Summary** to view summary details.
 - Click the arrow buttons to view information on other frames.

The screenshot shows the 'Frame Style View' window. It has a title bar with a close button. The main area is divided into two sections: 'Style Summary' and 'Available Sizes'.

Style Summary:

Manufacturer	A_A OPTICAL	Gender	Female
Brand/Designer	Alexander Collection	Material	Monel
Style Name	Addison	Mount	
Item Type		Bridge Size	20
Item Usage	Metal	Axis	0

Available Colors {(*)} image:

Choco
Indigo
Silver

Available Sizes:

Eye	A	B	ED	DBL	Temple
44	43.5	27.4	44.6	20	140
46	45.5	29.4	46.6	20	145

At the bottom, there are navigation buttons: '<<', '<', '>', '>>', 'Close', 'Price', and 'List SKU's'.

- 8 Click **Close** to close the Frame Style View window.
- 9 Click **Close** to close the View Catalog window.

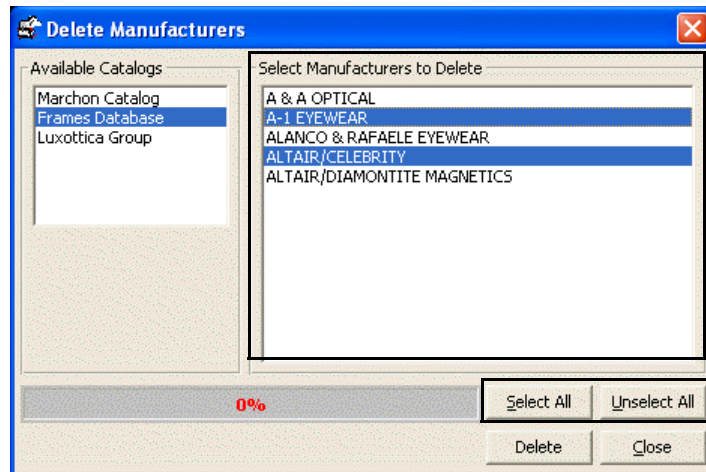
► Deleting Manufacturers

Note

You can only delete manufacturers from the FRAMES SPEX UPC CD-ROM and the Marchon Diskette. You cannot delete manufacturers from the FRAMES Quarterly CD-ROM.

- 1 Click **Tasks** and select **Delete Manufacturers**.
The **Delete Manufacturers** window opens.
- 2 Select a catalog from the **Available Catalogs** box.

- 3 Select or deselect manufacturers by clicking **Select All**, **Unselect All**, or individually selecting and deselecting manufacturers.



- 4 Click **Delete**.
- 5 Click **OK** on the Deletion Completed window.

CHAPTER 11

Maintaining Inventory Information

In this chapter:

For more information on maintaining inventory, see the “OSSU 303 Maintaining Inventory” iTrain and the OSSU 300-2, “Maintaining Inventory,” training course.

- [Setting Up Inventory, 327](#)
- [Recording Product Inventory Details, 330](#)
- [Maintaining Inventory Information, 332](#)

Maintaining inventory information in OfficeMate allows you to track items that you have in stock and “on hand.”

Setting Up Inventory

This section tells you how to set up inventory preferences in OfficeMate, including how

- [To begin maintaining perpetual inventory, 327](#)
- [To set up inventory preferences, 328](#)

Note

Press the **F12** key when your cursor is in a drop-down box to open a **Maintain** window and add new items to the drop-down menu selections. For more information on using the F12 key, go to [To add and maintain list box selections \(F12\) on page 19](#).

► To begin maintaining perpetual inventory

- 1 From the OfficeMate main window, click **Setup**, and select **Product Setup**. The **Product Setup** window opens.
- 2 Select one of the eight product types from the **Product Type** drop-down menu.

- 3 Ensure that the **Maintain perpetual** check box is selected.
- 4 Select the product type's unit of measure from the **UOM** drop-down menu.
- 5 Select the inventory cycle from the **Physical inventory cycle** drop-down menu.

The screenshot shows the 'Product Setup' window with the 'Preferences' tab selected. The 'Product type' is set to 'Frames'. The 'Maintain perpetual' checkbox is checked. The 'UOM' is set to 'Each'. The 'Physical inventory cycle' is set to 'Annual Cycle'. The 'Tax 1 type' is set to 'Frames tax'. The 'Tax 2 type' is empty. The 'Stocking level' is set to '1' with a 'Min' of '1'. The 'Commission method' is set to 'Margin%' with a 'Commission rate' of '0'. The 'Special incentive -Spiff' is set to '\$0.00'. The 'Apply Discount On Services' checkbox is unchecked. The window has buttons for 'OK', 'New', 'Delete', 'Print', and 'Cancel' at the bottom.

- 6 Type the stocking level in the **Stocking Level** text box. The default stocking level is 1.
- 7 Type the minimum quantity of the product that you want to have in stock in the **Min** text box. The default minimum quantity is 1.
- 8 Click **Print** to print the product type information, if desired.
- 9 Click **OK** to close the Product Setup window.

► To set up inventory preferences

- 1 From the OfficeMate main window, click **Setup**, and select **Product Setup**. The **Product Setup** window opens.
- 2 Click the **Preferences** tab.
- 3 Type or select the start date of the first period in your inventory calendar in the **Start date of first periods** text box.

Note

Typically, the start date is the date your fiscal year begins; check with your accountant to confirm the start date of the first period in your inventory calendar.

- 4 Type the current calendar year in the **Current calendar year** text box.

- 5 Type the current inventory period in the **Current inventory period** text box.

Note

The amount of time between the start and close of the inventory is an inventory period. The length of the current inventory period is entered only at the start of your inventory. The inventory period is automatically advanced when you close the current inventory period.

- 6 Type the number of periods in a year in the **# of periods in a year** text box.
- 7 If you keep your inventory physical count by board location select the **Yes** radio button next to **Will physical count be stored by board location?**

Note

The board location is the location of an item within the dispensary. For contact lenses and other items, the location could be a bin, shelf, or drawer.

Product Setup

Product Type | **Preferences** | GL Numbers | Mass Change | Commission Class

These Preferences apply to ALL Product Types.

Start date of first periods: 01/01/2000

Current calendar year: 2004

Current inventory period: 3

of periods in a year: 12

Will physical count be stored by board location? ☒ Yes ☐ No

Barcode Label Options

Description (1 Line, 1st 24 chrs.) ☒ Yes ☐ No

Description (split on two lines) ☐ Yes ☒ No

Manufacturer ☒ Yes ☐ No

Designer Series ☒ Yes ☐ No

Color Description ☐ Yes ☒ No

Board Location ☐ Yes ☒ No

Date Received ☐ Yes ☒ No

Fee ☒ Yes ☐ No

You may select 4 lines of data for barcode.

Column on bar code ☐ UPC ☒ Product Code

Bar Code Printer: Sato CX208

Comm. Port for Barcode Printer: 0

OK New Delete Print Cancel

- 8 Click **OK** to close the Product Setup window or go to [To set up barcode label options on page 115](#) if you use a barcode printer to print barcode labels.

Recording Product Inventory Details

Before you begin maintaining inventory, record product information and inventory details in OfficeMate. Complete the instructions in this section to record product inventory details. Go to [Recording Product Information on page 121](#) to record product information.

Notes

- If you are using the FRAMES SPEX UPC CD-ROM, FRAMES Quarterly CD-ROM, or Marchon Frames Diskette, go to [Using FrameMate on page 313](#) for instructions on how to use FrameMate to transfer frame information into OfficeMate.
- Press the **F12** key when your cursor is in a drop-down box to open a **Maintain** window and add new items to the drop-down menu selections. For more information on using the F12 key, go to [To add and maintain list box selections \(F12\) on page 19](#).

- 1 Open the Products window. For more information on opening the Products window, go to [Setting Up Product & Service Information on page 113](#).
- 2 Select a product from the **Product Type** drop-down menu.
- 3 Select a product manufacturer from the **Manufacturer** drop-down menu.
- 4 Type a product name in the **Product Name** text box.
- 5 Click **F2-Find** to search for a product.
- 6 Double-click on a product for which you want to record product inventory details.
- 7 Click the **Product Details** tab.
- 8 Click **New** to add new product details or select a line in the table to modify product inventory details.
- 9 Type product sizes into the **Product Sizes** text boxes.
- 10 Type product sizes in the **BC**, **Dia**, **Sph**, **Cyl**, **Axis**, and **Add** text boxes.
- 11 Type or select a color from the **Color** drop-down menu, if applicable.
- 12 Type the product code in the **Product Code** text box.

OR

Type the UPC code in the **UPC Code** text box.

Note

If you transfer frame information from a FRAMES Data CD-ROM into OfficeMate, the product UPC code is automatically moved to the Product Code box and the UPC Code box is empty. For more information on how to use FrameMate to transfer frame information into OfficeMate, go to [Transferring & Loading Frames into the OfficeMate Products Database on page 320](#).

- 13 Type the board location in the **Board Location** text box.

The screenshot shows the 'Products : Contact Lenses - Acuvue' window. The 'Product Details' tab is active, displaying a list of products with columns: Discontinued, BC, Dia, Sph, Cyl, Axis, Add, Color, Product Code, UPC Code, Board Location, Stocking Level, and Minimum. The product 789789 is selected, showing a Board Location of 65454. Below the list, the 'Print Bar Code' button is visible. The 'Product Sizes' section shows a table with BC, Dia, Sph, Cyl, Axis, and Add values. The 'Inventory' section shows a table with Date last sold, Last received, and various inventory metrics like Qty Sold, Qty Returned, Amount Sold, COGS Sold, and Gross Profit. The 'Recorded By' field is set to Franklin, Helen.

- 14 Type the stocking level in the **Stocking level** text box, if applicable.
- 15 Type the minimum quantity of the product that you want to have in stock in the **Min** text box.
- 16 If this is a new product, type the quantity in stock in the **Qty on Hand** text box.

Note

You can only record a quantity in the Qty on Hand text box if the product is new. If you need to modify the quantity recorded in the Qty on Hand text box, go to [To adjust your inventory on page 332](#).

- 17 Select the staff member recording the inventory details from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 18 Click **Print Bar Code** to print a barcode for the selected product.
- 19 Click **Save** and select one of the following options:
- **Save** to save the information and keep the Products window open.
 - **Save and New** to save the information and create a new product.
 - **Save and Exit** to close the Products window.

Maintaining Inventory Information

This section tells you how to record inventory adjustments, purchase orders, physical counts, and period closes, including how

- To adjust your inventory, 332
- To create & maintain purchase orders, 334
- To create & maintain purchase orders from fee slips, 336
- To receive purchase order inventory products, 338
- To manually count & record your physical inventory, 339
- To scan & record your physical inventory, 340
- To close inventory periods, 341

► To adjust your inventory

You must adjust your inventory in order to modify or delete the quantity of products that you have stocked and “on hand.”

- 1 Click the **Products** icon, select **Inventory**, and then select **Adjustments**.

OR

Click **Tasks** on the main window toolbar, select **Inventory**, and then select **Adjustment**.

The **Inventory Adjustment** window opens.

- 2 Select an adjustment type from the **Adjustment Type** drop-down menu, if applicable.

Notes

- The **Adjustment** adjustment type allows you to enter a positive or negative adjustment amount.
- The **Receive Inventory** adjustment type allows you to increase your inventory.
- The **Return to Vendor** adjustment type allows you to decrease your inventory.

- 3 Type or select a date from the **Adjustment Date** box.
- 4 Select the staff member recording the adjustment from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 5 Type comments in the **Comment** text box, if applicable.

- 6 Select a product to adjust using one of the following methods:
- Type a product name or code into a **Product Name/Code** text box.
 - Click on the **Product Name/Code** column heading to search for a product. For more information on searching for products, go to [Finding Products & Services on page 119](#).
 - Click **Add Product** to add a new product. For more information on adding products through the Find Product window, go to [Finding Products & Services on page 119](#).

Note

If you added a product or service in step 6, you must record additional product or service information before recording the product or service on a fee slip or maintaining inventory for the product. For more information on recording additional product or service information, go to [Recording Product Inventory Details on page 330](#).

- 7 Type the adjusted quantity in the **Adj Qty** text box.

Notes

- Type a minus (-) sign in front of the adjustment quantity to record a negative adjustment.
- To remove a product from the inventory worksheet, type 0 in the **Adj Qty** text box, ensure that 0 is recorded in the Qty on Hand, On Order, Stocking level, and Min text boxes on the Product Details tab in the Products window, and select the Inactive check box in the Products window. For more information on the Product Details tab in the Products window, go to [Recording Product Inventory Details on page 330](#). For more information on the Products window, go to [To add or modify products on page 122](#).

- 8 Type a new product costs in the **Cost** text box, if applicable, and select the **Update Item Cost** check box.

- 9 Select a reason for the adjustment from the **Reason** drop-down menu.

- 10 Click **Print Register** to review the inventory adjustment(s), if desired.
- 11 Click **Record**.

The **Qty on Hand** text box on the Product Details tab in the Products window is updated.

► To create & maintain purchase orders

Purchase orders (POs) help you manage your inventory items when products are ordered from vendors. You can create purchase orders even if you do not maintain inventory.

- 1 Click the **Products** icon, select **Inventory**, select **Purchase Order**, and select **Create/Maintain**.

OR

Click **Tasks** on the main window toolbar, select **Inventory**, select **Purchase Order**, and select **Create/Maintain**.

The **Create/Maintain PO** window opens.

Note

To maintain an existing purchase order, type the PO number in the **PO No.** text box, and click **Get PO** or click **F2 Find** to search for and select a purchase order. After the purchase order is open, complete one of the following tasks:

- Click **Cancel Entire PO** to cancel the entire purchase order.
- Click **Print PO** to print the purchase order.
- Click **New** to create a new purchase order.

- 2 Select a vendor from the **Vendor** drop-down menu.
- 3 Select the staff member creating or maintaining the purchase order from the **Recorded By** drop-down menu, if this field is not locked. For more

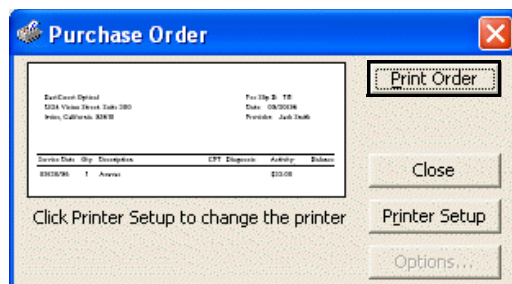
information on locking and unlocking this menu, go to [Customizing Security Preferences](#) on page 62.

- 4 Type the vendor reference number in the **Ref No** text box, if applicable.
- 5 Type notes in the **Note** text box, if applicable.
- 6 Select products for the purchase order using one of the following methods:
 - Type a product name or code into a **Product Name/Code** text box.
 - Click on the **Product Name/Code** column heading to search for and select a product. For more information on searching for products, go to [Finding Products & Services on page 119](#).
 - Click **Add Product** to add a new product. For more information on adding products through the Find Product window, go to [Finding Products & Services on page 119](#).
- 7 Scan or type the number of items that you want to order in the **Order Qty** text box, if necessary.
- 8 Click on the **Patient Name** column heading to search for and select a patient to link to the product, if applicable.
- 9 Select the **Cancel** check box if you do not want to order an item on the purchase order.

[illegible]

- 10 Click **Record**.
The **New PO Number** window opens and information is updated on the Product Details tab in the Products window.
- 11 Click **OK**.
The **Purchase Order** window opens.

- 12 Click **Print Order** to print the purchase order.



Note

Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).

► To create & maintain purchase orders from fee slips

Purchase orders (POs) help you manage your inventory items when products are ordered from vendors. You can automatically create purchase orders for all vendors from items sold on fee slips. You can create purchase orders even if you do not maintain inventory.

- 1 Click the **Products** icon, select **Inventory**, select **Purchase Order**, and select **From Fee Slip**.

OR

Click **Tasks** on the main window toolbar, select **Inventory**, select **Purchase Order**, and select **From Fee Slip**.

The **Create PO from Fee Slip** window opens.

- 2 Select a vendor from the **Vendor** drop-down menu.
- 3 Click **Yes** in the Create PO from Fee Slip warning message window to load all vendor items recorded on fee slips.
- 4 Select the staff member creating or maintaining the purchase order from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 5 Type the vendor reference number in the **Ref No** text box, if applicable.
- 6 Type notes in the **Note** text box, if applicable.
- 7 Click on the **Patient Name** column heading to search for and select a patient to link to the product, if applicable.

Note

Click **Cancel All** to cancel the entire purchase order.

- 8 Select the **Cancel** check box if you do not want to order an item on the purchase order.

Product Name/Code	Vendor	Ttl On Hand	Ttl On Order	Order Qty	Cost	Patient Name...	Cancel
IRLOCK 760/1 [679516691691] 53 0 140 53 37.5 55.5 G	Marchon Eyewear, Inc.	0	1	1	89.95	Anna Ahle	<input type="checkbox"/>
101 COACH ASTOR [679516718916] 52 0 140 52 29.5 54	Marchon Eyewear, Inc.	0	1	1	59.95	Harper Cole	<input type="checkbox"/>
IRLOCK 760/1 [679516691691] 53 0 140 53 37.5 55.5 G	Marchon Eyewear, Inc.	0	1	1	89.95	Sally Carter	<input checked="" type="checkbox"/>
101 COACH ASTOR [679516719173] 52 0 140 52 29.5 54	Marchon Eyewear, Inc.	3	1	1	59.95	Harper Cole	<input type="checkbox"/>
101 COACH ASTOR [679516719173] 52 0 140 52 29.5 54	Marchon Eyewear, Inc.	3	1	1	59.95	Harper Cole	<input type="checkbox"/>
101 COACH ASTOR [679516719043] 52 0 140 52 29.5 54	Marchon Eyewear, Inc.	4	1	1	59.95	Harper Cole	<input checked="" type="checkbox"/>
102 COACH CLAIRE [679516778286] 49 0 135 0 0 LILA	Marchon Eyewear, Inc.	0	1	1	64.95	Harper Cole	<input type="checkbox"/>
101 COACH ASTOR [679516718916] 52 0 140 52 29.5 54	Marchon Eyewear, Inc.	0	1	1	59.95	Harper Cole	<input type="checkbox"/>
101 COACH ASTOR [679516719432] 52 0 140 52 29.5 54	Marchon Eyewear, Inc.	0	1	1	59.95	Harper Cole	<input checked="" type="checkbox"/>

- 9 Click **Record**.

The **New PO Number** window opens and information is updated on the Product Details tab in the Products window.

- 10 Click **OK**.

The **Purchase Order** window opens.

- 11 Click **Print Order** to print the purchase order.

Note

Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, go to [Setting Up the Printer on page 31](#).

► To receive purchase order inventory products

After you receive products that you ordered, enter the quantity received on the purchase order.

- 1 Click the **Products** icon, select **Inventory**, select **Purchase Order**, and select **Receive**.

OR

Click **Tasks** on the main window toolbar, select **Inventory**, select **Purchase Order**, and select **Receive**.

The **Receive PO** window opens.

- 2 Select the staff member creating or maintaining the purchase order from the **Recorded By** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 3 Type the vendor reference number in the **Ref No** text box, if applicable.
- 4 Type notes in the **Note** text box, if applicable.
- 5 Type the PO number in the **PO No.** text box, and click **Get PO** or click **F2 Find** to search for and select a purchase order.
- 6 Type the number of items that you received in the **Qty Received** text box.
- 7 If the item was placed on back order, type or double-click to select the date the back order will be available in the **Back Order Date** text box.

Product Name/Code	Patient Name	Qty Ordered	Qty Prev Received	Qty Received	Cost	Back Order Date
101 COACH ASTOR [679516719432] 52 0 140 52 29.5 54.5 AN	Harper Cole	1	0	1	59.95	
102 COACH CLAIRE [679516778286] 49 0 135 0 0 0 LILAC	Harper Cole	1	0	1	64.95	
101 COACH ASTOR [679516719043] 52 0 140 52 29.5 54.5 GL	Harper Cole	1	0	0	59.95	11/11/2005
101 COACH ASTOR [679516719173] 52 0 140 52 29.5 54.5 CC	Harper Cole	1	0	1	59.95	

- 8 Click **Print Bar Code** to print barcode labels, if applicable.
- 9 Click **Record**.

► To manually count & record your physical inventory

Follow the instructions below to manually count and record your physical inventory.

- 1 Click the **Products** icon, select **Inventory**, and select **Physical Count**.

OR

Click **Tasks** on the main window toolbar, select **Inventory**, and select **Physical Count**.

The **Physical Count Entry** window opens.

- 2 Select the **Yes** radio button to indicate that this is a new inventory cycle.
- 3 Select a manufacturer from the **Manufacturer** drop-down menu, if you are recording your inventory by manufacturer.
- 4 Select an inventory count cycle from the **Select a Count Cycle** drop-down menu.

All of your products that have stocking levels recorded are displayed. To record stocking levels for products, go to [Recording Product Inventory Details on page 330](#).

- 5 Type or select the inventory date in the **Inventory Date** box.
- 6 Select the user recording the physical inventory from the **Recorded by** drop-down menu, if this field is not locked. For more information on locking and unlocking this menu, go to [Customizing Security Preferences on page 62](#).
- 7 Click **Worksheet** to print the inventory worksheet.
- 8 Click **Record** to save the inventory cycle.
- 9 Click **Cancel** to close the Physical Count Entry window.
- 10 Physically count your inventory and record your inventory counts on the worksheet.
- 11 Click the **Products** icon, select **Inventory**, and select **Physical Count**.

OR

Click **Tasks** on the main window toolbar, select **Inventory**, and select **Physical Count**.

The **Physical Count Entry** window opens.

- 12 Select the **No** radio button to indicate that this is not a new inventory cycle.
- 13 Select an inventory count cycle from the **Select a Previous Cycle** drop-down menu.

All of your products that you recorded in step 8 above are displayed.

- 14 Type the actual number of inventory items counted in the **Count** column.

Location	Manufacturer	Product Name/Code	Product Size/Color	Count	On hand	Variance	Unit cost	\$ Variance
	Marchon Eyewear, Inc.	VRLOCK 760/1 [679516691691]	53 0 140 53 37.5 55.5 GUNMETAL	0	-2	2	89.95	179.90
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671850]	0 140 50 28.5 52.5 BLACK	0	0	0	59.95	0.00
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671852]	0 140 52 29.5 54.5 BLACK	2	0	0	59.95	119.90
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671950]	0 140 50 28.5 52.5 GUNMETAL	1	-1	2	59.95	119.90
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671952]	0 140 52 29.5 54.5 GUNMETAL	4	0	0	59.95	239.80
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671950]	0 140 50 28.5 52.5 COFFEE	1	0	1	59.95	59.95
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671952]	0 140 52 29.5 54.5 COFFEE	1	-1	1	59.95	59.95
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671950]	0 140 50 28.5 52.5 SAND	0	0	0	59.95	0.00
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671952]	0 140 52 29.5 54.5 SAND	0	0	0	59.95	0.00
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671950]	0 140 50 28.5 52.5 ANTIQUE BLUE	0	0	0	59.95	0.00
	Marchon Eyewear, Inc.	101 COACH ASTOR [67951671952]	0 140 52 29.5 54.5 ANTIQUE BLUE	0	0	0	59.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677749]	0 135 0 0 0 Demibrown	0	0	0	64.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677751]	0 135 0 0 0 BLACK	0	0	0	64.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677849]	0 135 0 0 0 TAN	0	0	0	64.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677851]	0 135 0 0 0 TAN	0	0	0	64.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677849]	0 135 0 0 0 SAND	0	0	0	64.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677851]	0 135 0 0 0 SAND	0	0	0	64.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677849]	0 135 0 0 0 LILAC	0	0	0	64.95	0.00
	Marchon Eyewear, Inc.	102 COACH CLAIRE [67951677851]	0 135 0 0 0 LILAC	0	0	0	64.95	0.00

- 15 Click **Print Variance** to print the Variance report.

The Variance report prints and displays the difference between what inventory you actually have and what inventory OfficeMate reports you as having.

- 16 Click **Record**.

Note

If you do not have time to finish recording the actual number of inventory items counted and print the Variance report, you must still click **Record**. You can continue your work where you stopped by selecting the inventory count cycle from the **Select a Previous Cycle** drop-down menu.

- 17 Click **Update On-Hand** to update the quantity of inventory items that you have on hand and close the inventory cycle.

► To scan & record your physical inventory

Follow the instructions below to scan and record your physical inventory.

For more information on using your barcode scanner, see the "Scanning and Printing Barcodes With OfficeMate" document.

- Click the **Products** icon, select **Inventory**, and select **Scan Count**.
OR
Click **Tasks** on the main window toolbar, select **Inventory**, and select **Scan Count**.
The **Scanned Physical Count Entry** window opens.
- Select the **Yes** or **No** radio button to indicate if this is or is not a new inventory cycle.
- Select a manufacturer from the **Manufacturer** drop-down menu, if applicable.
- Select an inventory count cycle from the **Select a Count Cycle** or **Select a Previous Cycle** drop-down menu.

- Place your cursor in the **Product Code** text box.

Location	Manufacturer	Product Name/Code	Product Size/Color	Count	On hand	Variance	Unit cost	\$ Variance
Marchon Eyewear, Inc.		VRLOCK 760/1 [679516691691]	53 0 140 53 37.5 55.5 GUNMETAL	0	-2	2	89.95	179.90
Marchon Eyewear, Inc.		101 COACH ASTOR [679516718850]	0 140 50 28.5 52.5 BLACK	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		101 COACH ASTOR [679516718852]	0 140 52 29.5 54.5 BLACK	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719450]	0 140 50 28.5 52.5 GUNMETAL	0	-1	1	59.95	59.95
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719452]	0 140 52 29.5 54.5 GUNMETAL	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719150]	0 140 50 28.5 52.5 COFFEE	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719152]	0 140 52 29.5 54.5 COFFEE	0	-1	1	59.95	59.95
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719250]	0 140 50 28.5 52.5 SAND	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719352]	0 140 52 29.5 54.5 SAND	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719450]	0 140 50 28.5 52.5 ANTIQUE BLUE	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		101 COACH ASTOR [679516719452]	0 140 52 29.5 54.5 ANTIQUE BLUE	0	0	0	59.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777149]	0 135 0 0 0 Demibrown	0	0	0	64.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777151]	0 135 0 0 0 BLACK	0	0	0	64.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777849]	0 135 0 0 0 TAN	0	0	0	64.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777851]	0 135 0 0 0 TAN	0	0	0	64.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777849]	0 135 0 0 0 SAND	0	0	0	64.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777851]	0 135 0 0 0 SAND	0	0	0	64.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777849]	0 135 0 0 0 LILAC	0	0	0	64.95	0.00
Marchon Eyewear, Inc.		102 COACH CLAIRE [679516777851]	0 135 0 0 0 LILAC	0	0	0	64.95	0.00

- Use your barcode scanner to scan your inventory into the Scanned Physical Count Entry window.

- Click **Print Variance** to print the Variance report.

The Variance report prints and displays the difference between what inventory you actually have and what inventory OfficeMate reports you as having.

- Click **Record**.

Note

If you do not have time to finish recording the actual number of inventory items and print the Variance report, you must still click **Record**. You can continue your work where you stopped by selecting the inventory count cycle from the **Select a Previous Cycle** drop-down menu.

- Click **Update On-Hand** to update the quantity of inventory items that you have on hand and close the inventory cycle.

► To close inventory periods

An inventory period accumulates until you specifically close it. Close your inventory periods according to your normal accounting practices.

- Click the **Products** icon, select **Inventory**, and select **Period Close**.

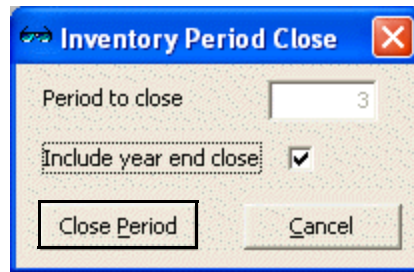
OR

Click **Tasks** on the main window toolbar, select **Inventory**, and select **Period Close**.

The **Inventory Period Close** window opens.

- Select the **Include year end close** check box if you are at the end of your fiscal year.

- 3 Click **Close Period**.



Your period-to-date inventory numbers are moved to year-to-date numbers, or if you included year-end numbers, your inventory numbers are moved to last year in the products' Product Details tab in the Products window.

CHAPTER 12

Processing Insurance Claims

In this chapter:

- Opening the Third Party Processing Window, 345
- Maintaining McKesson Carrier Information, 345
- Selecting Insurance Claims, 346
- Correcting Errors in Insurance Claims, 347
- Recording Additional Information on the CMS 1500 Form & ANSI File, 349
- Previewing & Printing Insurance Claims, 358
- Exporting Insurance Claims, 358
- Sending Insurance Claims to McKesson, 359
- Receiving Insurance Claim Reports From McKesson, 361
- Viewing McKesson Transferred Files, 362
- Using the Billing History, 364
- Releasing & Closing Claims on Hold, 366

For more information on processing insurance claims, see the [OSSU 403](#), [404](#), [405](#), and [406 Third Party Processing iTrains](#) and the OSSU 400-1 and 400-2, “[Billing Insurance Carriers](#),” training courses.

You can print insurance claims on CMS 1500 forms to mail to insurance companies and you can export claims to print image files, National Standard Format (NSF) files, and ANSI files to send electronically to insurance companies. You must follow the steps below to properly process printed and electronic insurance claims:

- 1 Select insurance claims. For more information on selecting claims, go to [Selecting Insurance Claims on page 346](#).
- 2 Correct errors in insurance claims. For more information on correcting errors, go to [Correcting Errors in Insurance Claims on page 347](#).
- 3 Record additional information on CMS 1500 forms. For more information on recording additional information, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#).
- 4 Preview and print insurance claims. For more information on previewing and printing insurance claims, go to [Previewing & Printing Insurance Claims on page 358](#).

- 5 Print or export electronic insurance claims. For more information on exporting insurance claims, go to [Exporting Insurance Claims on page 358](#).
- 6 Send insurance claims, if you are using the McKesson clearinghouse. For more information on sending insurance claims to McKesson, go to [Sending Insurance Claims to McKesson on page 359](#).
- 7 Receive insurance claim reports, if you are using the McKesson clearinghouse. For more information on receiving insurance claim reports from McKesson, go to [Receiving Insurance Claim Reports From McKesson on page 361](#).
- 8 View transferred insurance claim files, if you are using the McKesson clearinghouse. For more information on viewing ANSI files sent to McKesson and claim reports received from McKesson, go to [Viewing McKesson Transferred Files on page 362](#).
- 9 View insurance claim billing histories. For more information on viewing billing histories, go to [Using the Billing History on page 364](#).

Note

Before you begin processing insurance claims, set up the following information in OfficeMate:

- Insurance information. For more information on setting up insurance carriers, go to [To modify or add insurance information on page 58](#). For more information on recording insurance information in a patient's record, go to [To record insurance information on page 89](#).
- Provider information. For more information on setting up provider information, go to [To modify or add provider & staff names on page 50](#).
- Procedure codes. For more information on setting up procedure codes, go to [To add procedure codes on page 45](#).
- Products and services. For more information on setting up products and services, go to [Recording Product Information on page 121](#).
- Electronic claims clearinghouse. OfficeMate recommends using VisionWeb, GatewayEDI, or McKesson to process your insurance claims. For more information on VisionWeb, go to http://www.officemate.net/officemate_va_VisionWeb.aspx. For more information on GatewayEDI, go to http://www.officemate.net/officemate_va_GatewayEDI.aspx. For more information on McKesson, go to http://www.officemate.net/officemate_va_McKesson.aspx.

In addition to setting up the information above, you must also have recorded fee slips with insurance carriers. For more information on recording fee slips, go to [Creating & Recording Fee Slips on page 189](#).

Opening the Third Party Processing Window

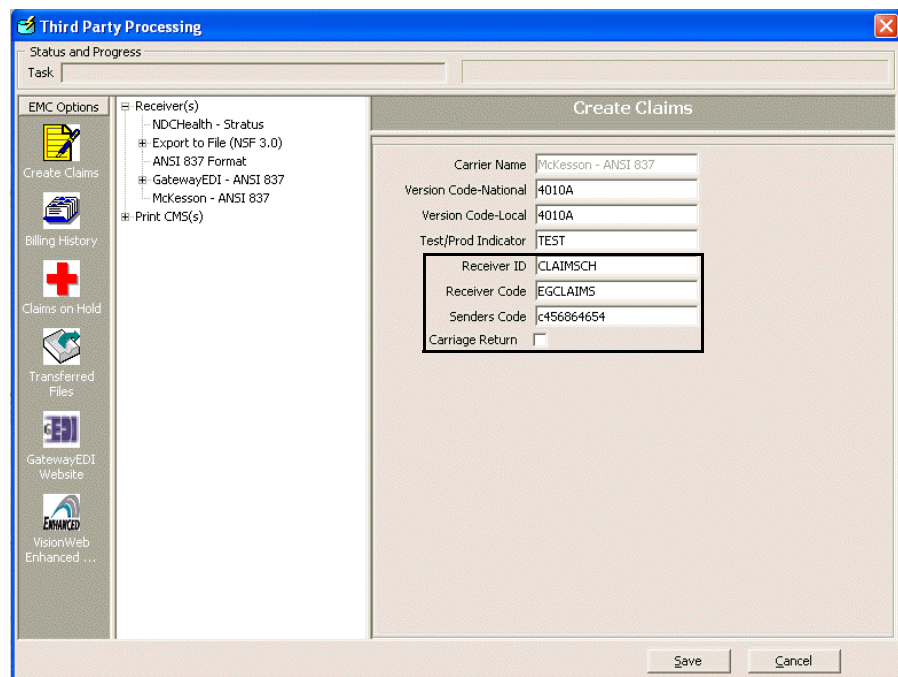
Open the Third Party Processing window using one of the following methods:

- Click the **3rd Party** icon and select **EMC Third Party**.
- Click **Tasks** on the main window toolbar, select **Third Party Processing**, and then select **EMC Third Party**.

Maintaining McKesson Carrier Information

This section tells you how to maintain carrier information if you are processing insurance claims through McKesson. You must complete the instructions in this section *before* sending insurance claims to McKesson.

- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 2 Click the + (plus) sign next to **Receiver(s)**.
- 3 Left-click and then right-click on **McKesson - ANSI 837** and select **Carrier Maintenance**.
- 4 Click **Yes** on the Process Warning window.
- 5 Type **CLAIMSCH** in the **Receiver ID** text box.
- 6 Type **ECGCLAIMS** in the **Receiver Code** text box.
- 7 Type your username listed on the McKesson Filing Information Sheet in the **Senders Code** text box. The first letter of your username must start with a lowercase “c.”
- 8 Ensure that the **Carriage Return** check box is *not* selected.



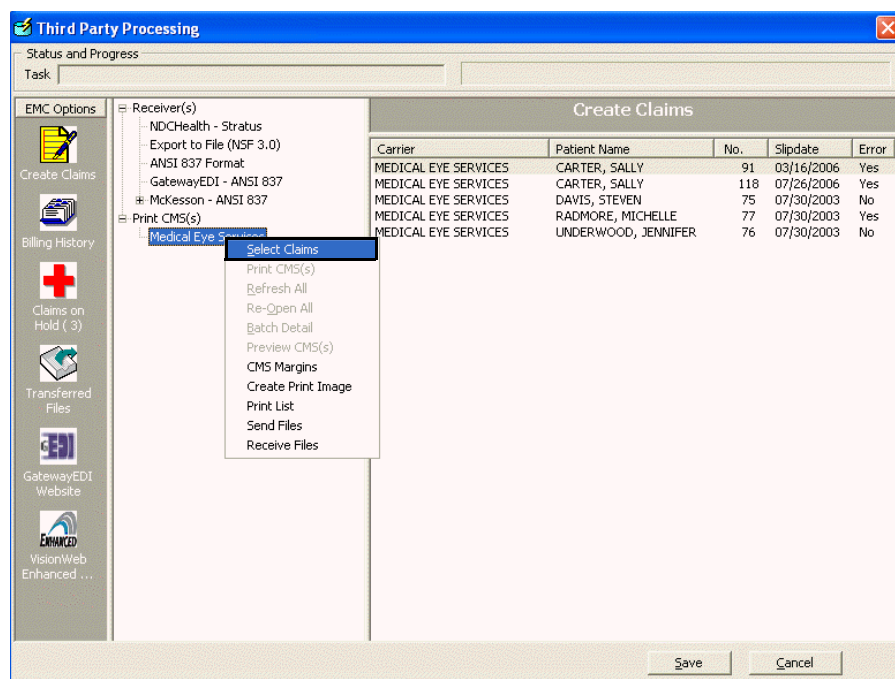
- 9 Click **Save**.
- 10 Navigate to your **C:\OMATE32** folder.
- 11 Double-click and open the **infoExchange.prop** file in Notepad.

- 12 Type your **username** provided by OfficeMate after the “emf.clientID=” text. Your EMF login can be found on your McKesson filing information sheet under your username. Your EMF login is a lowercase “c” followed by your six digit submitter ID number.
- 13 Type your **EMF client login password** provided by OfficeMate after the “emf.clientPassword=” text. Your EMF login can be found on your McKesson filing information sheet under password.
- 14 Type the appropriate information on the local.uploadDir and local.downloadDir lines. Replace “C:\OMATE32\DATA” with the path to your OfficeMate data directory.
local.uploadDir=C:\OMATE32\DATA\EMC\OutBound
local.downloadDir=C:\OMATE32\DATA\EMC\Inbound
- 15 Save and exit the file.

Selecting Insurance Claims

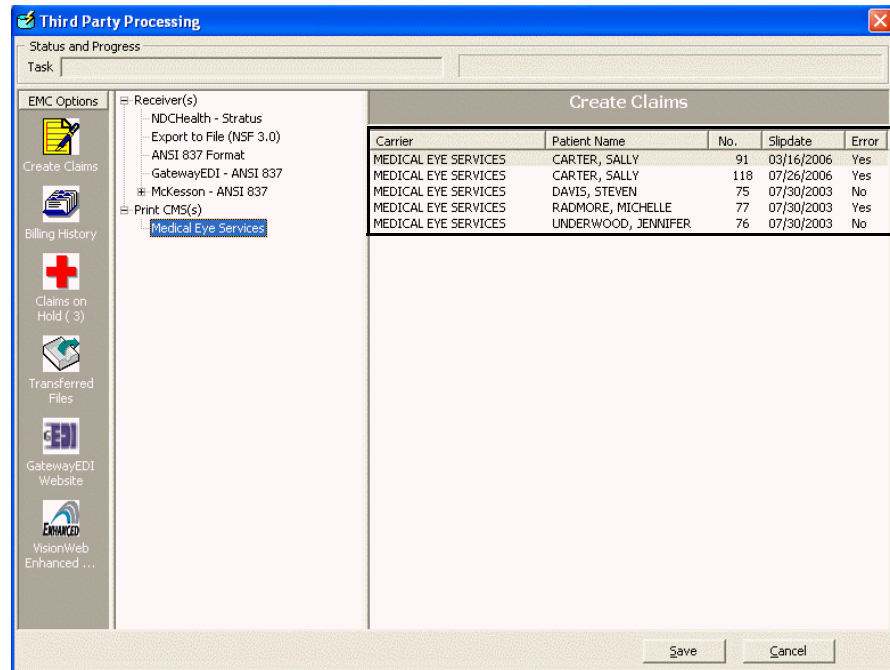
This section tells you how to select claims that you have not already processed.

- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 2 Complete one of the following actions, depending on your situation:
 - If you are printing CMS 1500 forms or creating print image files, click the + (plus) sign next to **Print CMS(s)**.
 - If you are exporting insurance claims to an electronic file, click the + (plus) sign next to **Receiver(s)**.
- 3 Left-click and then right-click on the receiver format (or **Receiver(s)**) or insurance carrier (or **Print CMS(s)**) and select **Select Claims**.



- 4 Click **Yes** on the Process Warning window to continue selecting insurance claims.

The insurance claims are selected and displayed on the right side of the window.



- 5 If you want to print a list of open insurance claims, right-click on an insurance carrier, select **Print List**, and then click **Print** on the View File Data window.
- 6 If the insurance claims have errors, go to [Correcting Errors in Insurance Claims on page 347](#). If the insurance claims do not have any errors, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#), [Previewing & Printing Insurance Claims on page 358](#), or [Exporting Insurance Claims on page 358](#).

Correcting Errors in Insurance Claims

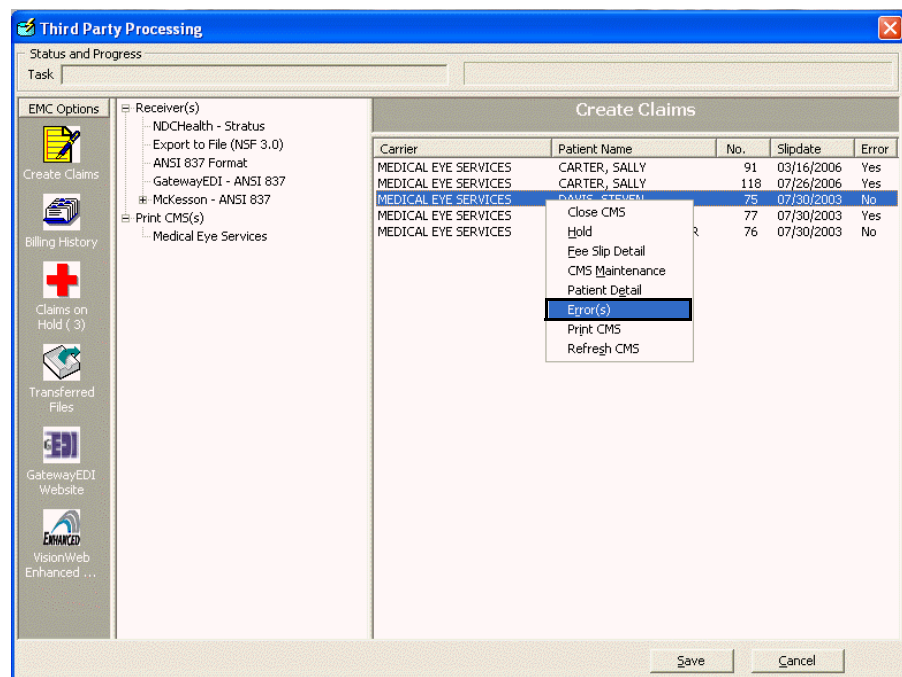
After you select insurance claims, you *must* correct any errors in the claims before you export them and file them electronically. Although it is not required for you to correct errors before printing and mailing insurance claims and creating print images, it is

highly recommended that you do so. This section tells you how to correct errors in your insurance claims.

Note

Some errors in insurance claims may be caused by using improper short dates. Ensure that your computer is using the MM/DD/YYYY short date format.

- 1 Select insurance claims. For more information on selecting insurance claims, go to [Selecting Insurance Claims on page 346](#).
- 2 Right-click on an insurance claim with an error and select **Error(s)**.

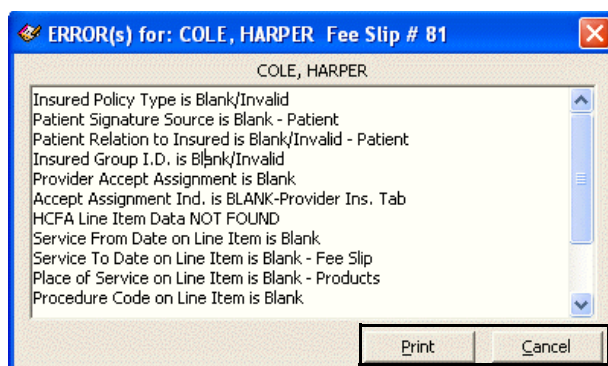


The **Error(s)** window opens.

- 3 View the list of errors and then click **Cancel** to close the Error(s) window.

Note

Click **Print** to print the list of errors.



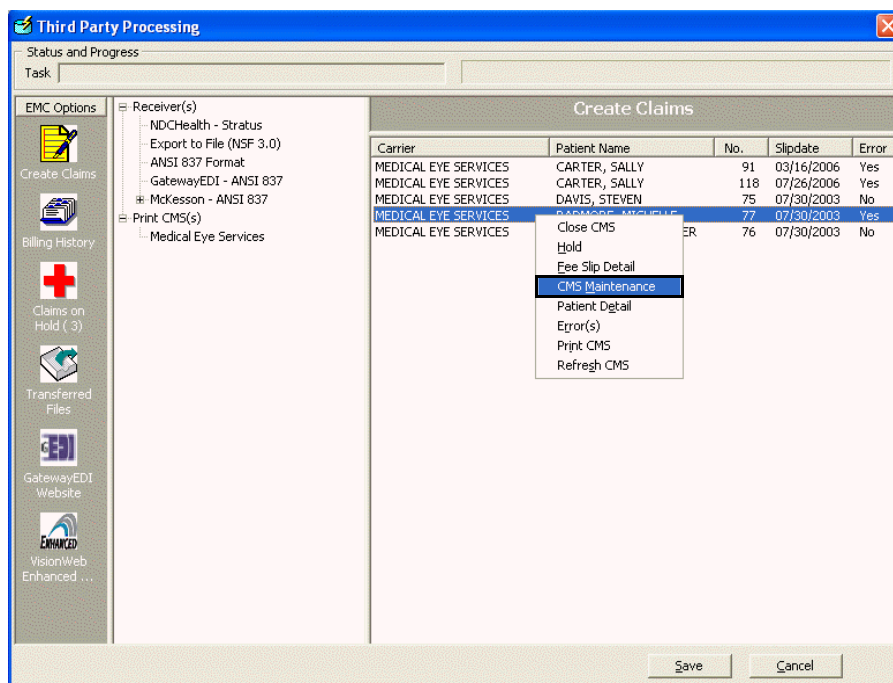
- 4 Right-click on an insurance claim with errors and select one or more of the following options:
 - **Fee Slip Detail** to open the Fee Slip window and correct procedure or diagnosis code errors on the fee slip. For more information on recording procedure and diagnosis codes on fee slips, go to [To record product & service information on page 194](#).
 - **Patient Detail** to open the Patient Demographic window and correct demographic and insurance errors on the patient's record. For more information on recording patient demographic information, go to [To record demographic information on page 83](#). For more information on recording insurance information, go to [To record insurance information on page 89](#).
- Note** Ensure that the Last Name, First Name, Address, Sex, Date of Birth, Social Security, Marital Status, and Emp. Status fields in the Patient Demographic window are correctly and completely recorded. Also, ensure that a provider is selected and recorded in the Fee Slip window.
- **Hold** if you do not want to correct the errors on the insurance claim right now and you want to put the claim on hold. For information on releasing or closing claims on hold, go to [Releasing & Closing Claims on Hold on page 366](#).
 - **Close CMS** to permanently remove the insurance claim from processing.
- 5 Right-click on an insurance claim or a group of claims and select **Refresh CMS** or **Refresh All** to refresh the CMS 1500 form(s) and clear the errors.
 - 6 If you want to record additional information on a CMS 1500 form, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#); otherwise, go to [Previewing & Printing Insurance Claims on page 358](#) or [Exporting Insurance Claims on page 358](#).

Recording Additional Information on the CMS 1500 Form & ANSI File

You can record and modify information directly on the CMS 1500 form. You can also record additional information in ANSI files. This section tells you how to record and modify information on the CMS 1500 form and add information to the ANSI file, including how

- [To record additional information on the CMS 1500 form, 349](#)
 - [To add additional information to the ANSI file, 357](#)
 - [To adjust CMS 1500 form margins, 357](#)
- **To record additional information on the CMS 1500 form**
- 1 Select insurance claims. For more information on selecting insurance claims, go to [Selecting Insurance Claims on page 346](#).
 - 2 Correct any errors in insurance claims. For more information on correcting errors, go to [Correcting Errors in Insurance Claims on page 347](#).

- 3 Left-click and then right-click on an insurance claim and select **CMS Maintenance**.



The CMS 1500 form opens.

4 Modify or add information to the CMS 1500 form.

Note

The following boxes on the CMS 1500 form import information from the corresponding OfficeMate fields. OfficeMate automatically populates the appropriate form fields based on the type of insurance.

- **Box 1:** Insurance Type drop-down menu on the Insurance tab on the Business Names window
- **Box 1A:** Insurance tab on the Patient Demographic window
- **Box 2 & Box 3:** Name and Date of Birth fields on the Patient Demographic window
- **Box 4:** Insured Party field on the Insurance tab on the Patient Demographic window
Medicare: Blank if the Insured Party and Patient are the same.
Other Insurances: "SAME" if the Insured Party and Patient are the same.
- **Box 5:** Address fields on the Patient Demographic window
- **Box 6:** Relationship to Insured drop-down menu on the Insurance tab on the Patient Demographic window
- **Box 7:** Insured Party field on the Insurance tab on the Patient Demographic window (if Other or Guarantor is selected as the insured party)
Medicare: Blank if the Insured Party and Patient are the same.
Other Insurances: "SAME" if the Insured Party and Patient are the same.
- **Box 8:** Marital Status and Emp. Status drop-down menus on the Patient Demographic window
- **Box 9, 9A, & Box 9C:** Insured Party field on the Insurance tab on the Patient Demographic window (if Other or Guarantor is selected as the insured party). This field can be manually edited on the CMS 1500 form or can be automatically populated by selecting the "Populate current insurance in box 9 on the CMS" check box on the Insurance tab on the Patient Demographic window.
- **Box 9D:** Insurance Name field on the Insurance tab on the Patient Demographic window
- **Box 10:** The default is NO, but you can change it.
- **Box 11:** Policy Group No drop-down menu on the Insurance tab on the Patient Demographic window

Note,
cont.

- **Boxes 11A–C:** Insured Party field on the Insurance tab on the Patient Demographic window (if Other or Guarantor is selected as the insured party)
Medicare: Blank if the Insured Party and Patient are the same.
Other Insurances: Box A populates if the Insured Party and the Patient are different; if they are the same, box B remains blank if no employer is recorded but is populated if an employer is recorded, and box C remains blank.
- **Box 11D:** The default is NO, but it is automatically changed to YES if there is another insurance carrier selected in box 9D.
- **Box 12:** Signature Source drop-down menu on the Insurance tab on the Patient Demographic window
- **Box 13:** Signature Source drop-down menu on the Insurance tab on the Patient Demographic window. If the guarantor is not a patient, NO SIGNATURE ON FILE will be displayed in box 13. You can edit this box if necessary.
- **Box 14, Box 15, & Box 16:** You can edit these boxes.
- **Box 17:** Name of referring professional (if one is selected) in the Referred Name field on the Patient Demographic window. You can set up a preference to automatically populate this box from the CMS tab on the System Preferences window or you can edit the referring doctor's name directly on the CMS 1500 form.
- **Box 17A:** Qualifier and Other ID fields on the Referring Dr. tab on the Business Names window
- **Box 17B:** NPI Number field on the Referring Dr. tab on the Business Names window
- **Box 18:** You can edit this box.
- **Box 19:** You can edit this box. If you are submitting an ANSI file to an insurance company, the text that you type in the Item Narrative text box on the Fee Slip Line Additional Data window appears in electronic claim files and in place of box 19 on the printed CMS 1500 form.
- **Box 20:** You can edit this box.
- **Box 21:** Diagnosis code in the ICD-9 field on the Fee Slip window
- **Box 22 & Box 23:** You can edit these boxes.

**Note,
cont.**

CMS 1500 form boxes 24A–24J are divided horizontally to accommodate the submission of both the NPI number and another/proprietary identifier during the NPI transition and to accommodate the submission of supplemental information to support the billed service. The top area of the six service lines is shaded and is the location for reporting supplemental information; it is not intended to allow for the billing of 12 lines of service.

- **Box 24A:** Posting date on the Fee Slip window or service dates on the Fee Slip Item Additional Data window
- **Box 24B:** Place of Service drop-down menu in the CMS - 1500 Additional Information box on the Products window
- **Box 24C:** EMG field on the Products window
- **Box 24D:** CPT code on the Fee Slip window. Modifiers for services are extracted from the Products window or the Fee Slip Item Additional Data window and modifiers for all other product types are extracted from the Fee Slip Item Additional Data window.
- **Box 24E:** Diagnosis pointer (1 2 3 4 or any combination of these numbers) referencing the line number(s) from box 21. Reference the primary diagnosis code first, then the secondary diagnosis code, and so on.
- **Box 24F:** Displays charges from the Products window if the Yes radio button is selected next to the “Use ‘Product Fee’ on CMS” option on the CMS tab in the System Preferences window; otherwise, displays charges from the Fee box on the Fee Slip window.
- **Box 24G:** Quantity column on the Fee Slip window. If you are required to report NDC units, click on the arrow on the right side of box 24J and type the appropriate qualifier in the **Box 24 Supplemental Information** text box (F2=International Unit; ML= Milliliter; GR=Gram; UN=Unit).
- **Box 24H:** EPSDT field on the Products window. If there is a requirement for you to report a reason code for EPDST, click on the arrow on the right side of box 24J and select the appropriate reason code from the **EPSDT Codes** drop-down menu (AV=Available; S2=Under Treatment; ST=New Service Requested; NU=Not Used; Y=Yes; N=No).

**Note,
cont.**

- **Box 24I:** Type drop-down menu on the Insurance tab on the Business Names window, if the type is different than what is already recorded in box 33B. Based on your selection from the Type drop-down menu on the Insurance tab on the Business Names window, the following qualifiers will be populated in the shaded section of the box: Blue Cross–1A, Blue Shield–1B, Medicare–1C, Medicaid–1D, Champus–1H, Commercial–G2, Other–1G.

If required or needed, enter or modify information in box 24I by clicking on the arrow on the right side of box 24J and selecting a qualifier from the drop-down menu.

- **Box 24J:** The submitter ID field or, if that is not available, Pin #, on the Insurance Information window (Provider/Staff tab on the Business Names window) is populated in the shaded section and the NPI Number field on the Provider/Staff tab on the Business Names window is populated in the unshaded section of the box, if this information is different than what is already recorded in box 33A.

In order to preview this box populated with information in OfficeMate or record supplemental information, you must click on the arrow on the right side of the box. The information will automatically display in the box when you create a print image file or print the CMS 1500 form. Type supplemental information in the **Box 24 Supplemental Information** text box if you are required to report information not already recorded. Follow payer instructions for using qualifiers; when reporting a service that does not have a qualifier, type two blank spaces before typing the information. Do not enter a space between the qualifier and the number/code/information. Do not enter hyphens or spaces within the number/code. To record more than one supplemental item, type the first item, three blank spaces, and then the next item.

If required or needed, enter or modify information in the shaded portion of box 24J by typing the rendering provider ID in the **Box 24J Rendering Provider ID** text box.

Any supplemental information that you record is populated in the shaded sections of boxes 24A–24G.

**Note,
cont.**

- **Box 25:** Tax ID field on the Provider/Staff tab on the Business Names window
- **Box 26:** Patient # on the Patient Demographic window
- **Box 27:** Accept Assign? and Don't Accept Assign? fields on the Insurance Information window (Provider/Staff tab on the Business Names window)
- **Box 28:** Total Charges field on the Fee Slip window
- **Box 29:** You can edit this box. Any amounts paid by the patient do not impact this box.
- **Box 30:** Total Charges field on the Fee Slip window
- **Box 31:** Business Names window. This box is blank if the assignment indicator is not checked on the Insurance Information window (Provider/Staff tab on the Business Names window).
- **Box 32:** Place of Service tab on the Business Names window or Business tab on the Business Names window (if the Print Business Address in Box 32 check box is selected on the Insurance tab on the Business Names window)
- **Box 32A:** If the Print Business Address in Box 32 check box is selected on the Insurance tab on the Business Names window, then the NPI Number field on the Business tab on the Business Names window is populated. If the Print Business Address in Box 32 is *not* selected on the Insurance tab on the Business Names window, then you must select the NPI number that is recorded in the NPI Number field on the Place of Service tab on the Business Names window from the Box 32A drop-down menu.
- **Box 32B:** If the Print Business Address in Box 32 check box is selected on the Insurance tab on the Business Names window, then the Qualifier and Facility ID fields on the Business tab on the Business Names window are populated. If the Print Business Address in Box 32 is *not* selected on the Insurance tab on the Business Names window, then you must select the qualifier and facility ID that are recorded in the Qualifier and Facility ID fields on the Place of Service tab on the Business Names window from the box 32B drop-down menu.
- **Box 33:** Business tab on the Business Names window
- **Box 33A:** NPI Number field on the Business tab on the Business Names window

Note,
cont.

- **Box 33B:** Group # (or Pin # if there is no Group #) on the Insurance Information window (Provider/Staff tab on the Business Names window). If the insurance type is *not* Blue Cross (1A), Blue Shield (1B), Medicare (1C), Medicaid (1D), Champus (1H), or Commercial (G2), the UPIN # on the Provider/Staff tab on the Business Names window is populated instead of the Group #.

- 5 If you are processing an ANSI insurance claim and the insurance carrier requires additional replacement information, supplemental information, or care dates, click **Addl Info** to open the CMS - Additional Information window and follow the instructions below:
 - a. Select a replacement category and reason from the **Replacement information** drop-down menus.
 - b. Select the document/report type, transmission code, and attachment control number from the **Claim Supplemental Information** drop-down menus.
 - c. Select the appropriate **Assumed** and/or **Relinquished** check box and, if applicable, select or type dates in the date boxes.
 - d. Click **OK**.

Note

Do *not* click **Refresh**. Clicking Refresh will delete any new information that you added, modified, or deleted on the CMS 1500 form.

- 6 Click **Print** to print the CMS 1500 form.

Note

Print CMS 1500 forms using Single Laser Sheet Claim Forms. OfficeMate recommends ordering CMS 1500 forms from the U.S. Government Bookstore at <http://bookstore.gpo.gov/actions/GetPublication?stocknumber=017-060-00655-2>. You can also purchase CMS 1500 forms from Dependable Business Products at 800.747.7210.

- 7 Click **OK** to save and close the CMS 1500 form.
- 8 If you want to preview or print insurance claims go to [Previewing & Printing Insurance Claims on page 358](#). If you want to create a batch file and export claims, go to [Exporting Insurance Claims on page 358](#).

► **To add additional information to the ANSI file**

If you are submitting an ANSI file to an insurance company and you want to include line item notes or special instructions in the file, follow the instructions below:

- 1 Open the Fee Slip window and find and select the patient's fee slip to which you want to add additional information. For more information on opening fee slips, go to [Creating & Opening Fee Slips on page 190](#).
- 2 Click on a line item and then click **Line Add'l Data**.
The **Fee Slip Item Additional Data** window opens.
- 3 Select an appropriate option for the line item from the **Note Reference** drop-down menu.

- 4 Type the additional information in the **Item Narrative** text box.
- 5 Click **OK**.

► **To adjust CMS 1500 form margins**

- 1 Select insurance claims. For more information on selecting insurance claims, go to [Selecting Insurance Claims on page 346](#).
- 2 Left-click and then right-click on the insurance carrier or **Print CMS(s)** and select **CMS Margins**.

The **Adjust Margins** window opens.

- 3 Type or use the arrows to adjust the top and left margins.



- 4 Click **Save**.

Previewing & Printing Insurance Claims

For more information on creating paper insurance claims, see the “OSSU 403 Third Party Processing for Paper Claims” iTrain.

- 1 Select insurance claims. For more information on selecting insurance claims, go to [Selecting Insurance Claims on page 346](#).
- 2 Correct any errors in insurance claims. For more information on correcting errors, go to [Correcting Errors in Insurance Claims on page 347](#).
- 3 Add additional information to the CMS 1500 forms. For more information on adding information to a CMS 1500 form, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#).
- 4 Right-click on an insurance carrier and select **Preview CMS(s)** to review the CMS 1500 forms.
- 5 Click **No** on the **Do you want to move CMS records?** window if you have not printed or exported the insurance claim.
- 6 Right-click on an insurance claim or insurance carrier and select **Print CMS** to print the CMS 1500 form and send it to your insurance carrier in the mail.
- 7 Click **Yes** on the **Do you want to move CMS records?** window if you have already printed or exported the insurance claim and you are ready to move the claim to the Billing History folder.
- 8 If you want to create a batch file and export claims, go to [Exporting Insurance Claims on page 358](#).

Exporting Insurance Claims

You can export claims to print image files, National Standard Format (NSF) files, and ANSI files to send electronically to insurance companies. This section tells you how to export insurance claims to send to insurance companies.

- 1 Select insurance claims. For more information on selecting insurance claims, go to [Selecting Insurance Claims on page 346](#).
- 2 Correct any errors in insurance claims. For more information on correcting errors, go to [Correcting Errors in Insurance Claims on page 347](#).
- 3 Add additional information to the CMS 1500 forms. For more information on adding information to a CMS 1500 form, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#).

For more information on creating insurance claims for GatewayEDI and VisionWeb, see the “OSSU 404 Third Party Processing for GatewayEDI Clients” and “OSSU 405 Third Party Processing for VisionWeb Clients/Print Image” iTrains.

- 4 If you are creating a print image file, follow the instructions below; otherwise, go to step 5:
 - a. Left-click and then right-click on the insurance carrier (or **Print CMS(s)**) and select **Create Print Image**.
 - b. Click **Yes** on the **Do you want to move CMS records?** window to move the claim to the Billing History folder.
 - c. Click **Yes** on the **Print Image Created** window after the print image is created.

Note

The print image file, PrintImg.txt, is located in the OMATE32\DATA\EMC folder. Send the PrintImg.txt file to your insurance carrier. A copy of the print image file is also located in the OMATE32\DATA\EMC folder and identified by the first two letters of the insurance carrier's name, the date, and the .exp extension.

- 5 If you are exporting insurance claims to an electronic file, left-click and then right-click on the receiver format (or **Receiver(s)**) and select **Create Claims**.

Note

The electronic file (NSFClaim.cnx, ANSIClaim.cnx, MKANSIClaim.cnx, GWANSIClaim.cnx, or Nclreq.dat) is located in the OMATE32\DATA\EMC folder. Send the NSFClaim.cnx, ANSIClaim.cnx, GWANSIClaim.cnx, or Nclreq.dat file to your insurance carrier. If you are sending insurance claims to McKesson, go to [Sending Insurance Claims to McKesson on page 359](#). A copy of the NSF, ANSI, or NDCHealth - Stratus file is also located in the OMATE32\DATA\EMC folder. The copy of the NSF and NDCHealth - Stratus file is identified by the date and the .e extension. A copy of the ANSI file is identified by the date and the .ae extension. A copy of the GatewayEDI ANSI file is identified by the date and the .ge extension.

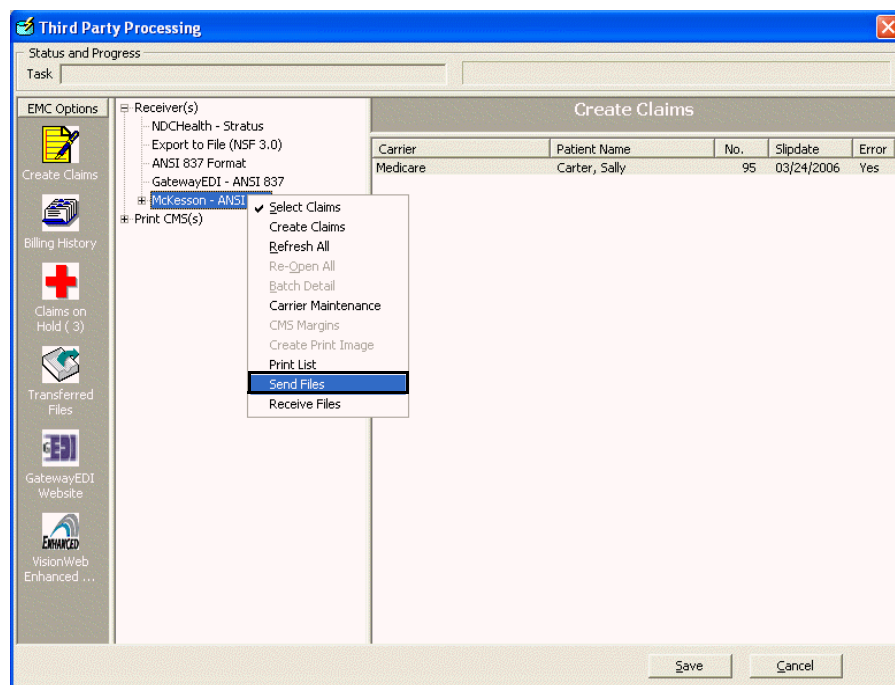
- 6 To view the billing history of an insurance claim, go to [Receiving Insurance Claim Reports From McKesson on page 361](#).

Sending Insurance Claims to McKesson

- 1 Select insurance claims. For more information on selecting insurance claims, go to [Selecting Insurance Claims on page 346](#).
- 2 Correct any errors in insurance claims. For more information on correcting errors, go to [Correcting Errors in Insurance Claims on page 347](#).
- 3 Add additional information to the CMS 1500 forms. For more information on adding information to a CMS 1500 form, go to [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#).
- 4 Export electronic insurance claims. For more information on exporting insurance claims, go to [Exporting Insurance Claims on page 358](#).

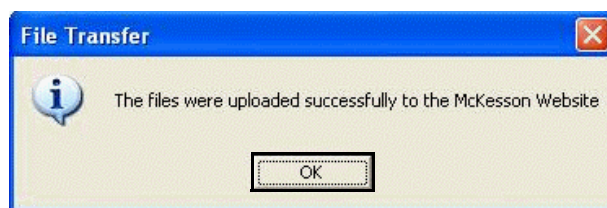
For more information on creating insurance claims for McKesson, see the “OSSU 406 Third Party Processing for McKesson Clients” iTrain.

- 5 Left-click and then right-click on **McKesson - ANSI 837** and select **Send Files**.



A command prompt window and a **McKesson Transfer** window open while the files are being sent to McKesson. After the files are sent, the **File Transfer** window opens.

- 6 Click **OK**.



Note

The electronic file (MKANSIClaim.cnx) is located in the OMATE32\DATA\EMC folder. A copy of the file is identified by the date and the .me extension.

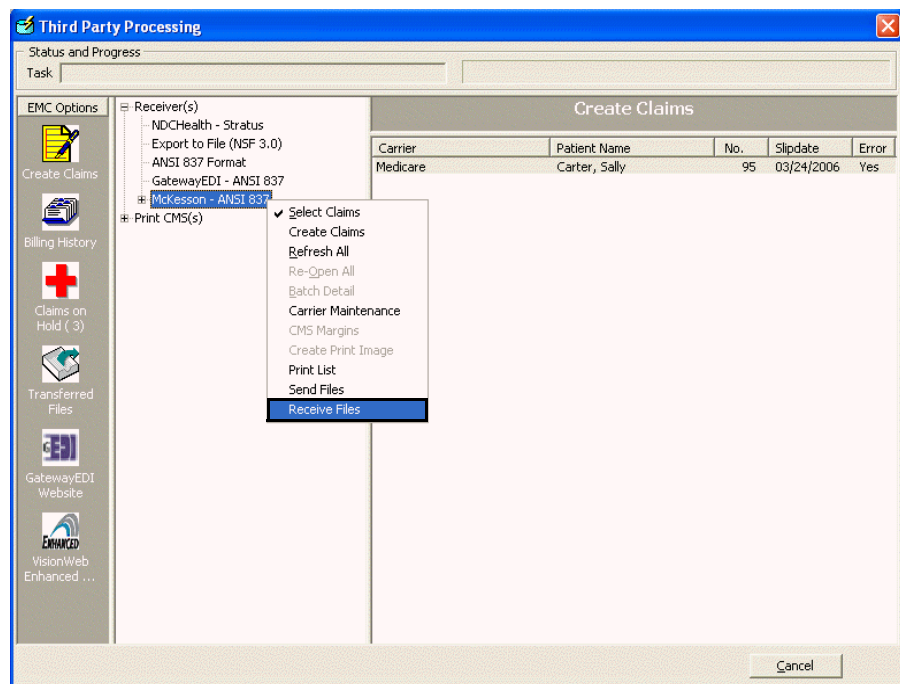
- 7 Go to [Receiving Insurance Claim Reports From McKesson on page 361](#) to receive insurance claim reports from McKesson. Go to [Viewing McKesson Transferred Files on page 362](#) to view the ANSI files transferred to McKesson and the insurance claim reports you received from McKesson.

Receiving Insurance Claim Reports From McKesson

For more information on McKesson reports, see the “[OSSU 407 McKesson Reports](#)” iTrain.

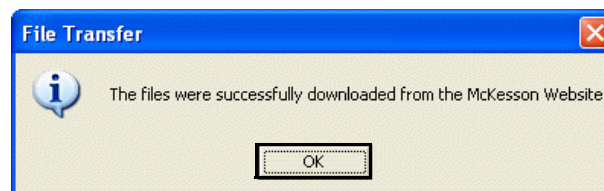
Wait at least one day after sending insurance claims to McKesson to receive insurance claim reports.

- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 2 Left-click and then right-click on **McKesson - ANSI 837** and select **Receive Files**.



A command prompt window and a **McKesson Transfer** window open while the files are being received from McKesson. After the files are received, the **File Transfer** window opens.

- 3 Click **OK**.



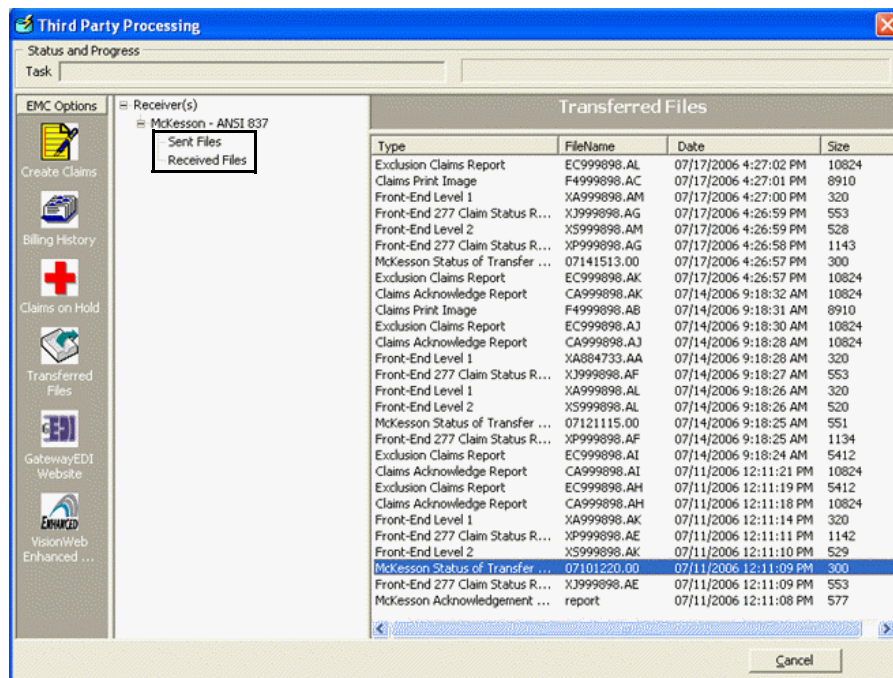
- 4 Go to [Viewing McKesson Transferred Files on page 362](#) to view the reports you received from McKesson.

Viewing McKesson Transferred Files

If you send insurance claims to McKesson and receive insurance claim reports from McKesson, you can view the sent and received files by following the instructions below:

- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 2 Click the **Transferred Files** icon.

- 3 If you want to view ANSI files that were sent to McKesson, click **Sent Files**. If you want to view insurance claim reports received from McKesson, click **Received Files**.



Note

The insurance claim report types and associated filenames are listed below. For more detailed information on these reports, go to <http://www.officemate.net/omkb/article.aspx?id=11244>.

- **Claims Acknowledge Report:** Filename begins with “CA”
- **Claims Acknowledge Report:** Filename begins with “UA”
- **Exclusion Claims Report:** Filename begins with “UE”
- **Exclusions Claims Report:** Filename begins with “EC”
- **Font-End 277 Claim Status Report:** Filename begins with “XP”
- **Front-End 277 Claim Status Rejection Report:** Filename begins with “XJ”
- **Front-End Level I, McKesson 997 Report:** Filename begins with “XA”
- **McKesson Acknowledgement Report:** Filename is “REPORT”
- **McKesson Status of Transfer Report:** Filename extension is “.00”
- **Payor Reports:** Filename begins with “CR”
- **Recreate Report:** Filename begins with “FX”

- 4 Double-click a file or report to open the **View File Data** window and view and print the claim or report.

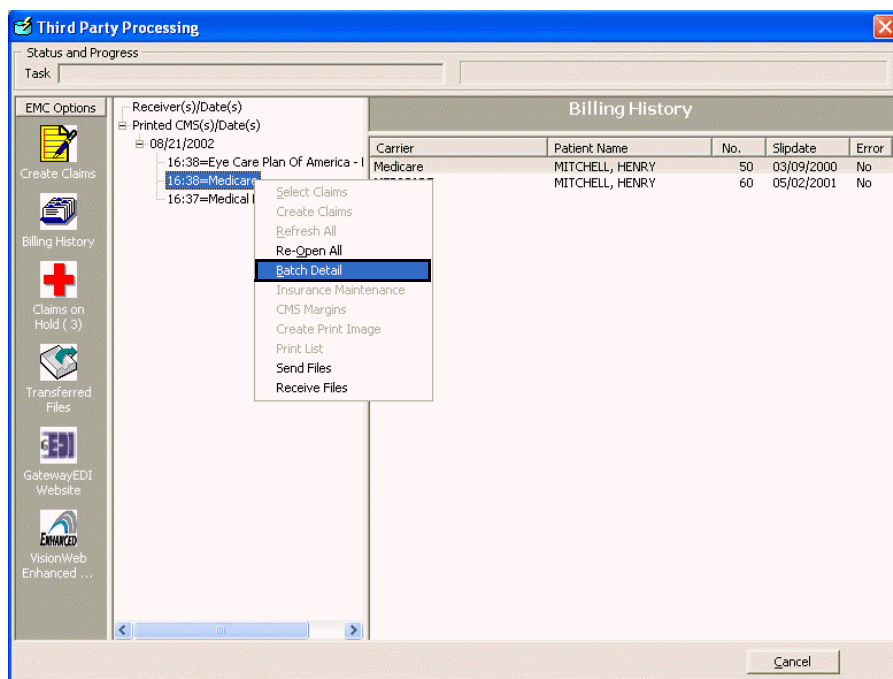
Using the Billing History

You can view details about the claims you have processed and reprocess claims using the billing history function in the Third Party Processing window. This section tells you how to use the billing history function, including how

- To view insurance claim histories, 364
- To reprocess insurance claims, 365

► To view insurance claim histories

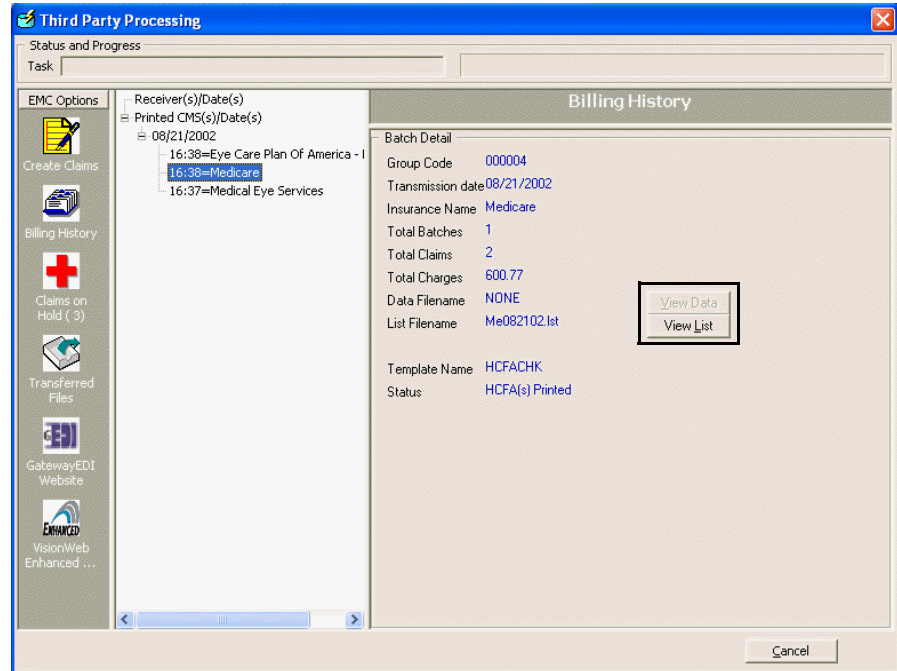
- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 1 Click the **Billing History** icon.
- 2 Complete one of the following actions, depending on your situation:
 - If you are viewing the history of print image files, click the + (plus) sign next to **Print CMS(s)/Date(s)**.
 - If you are viewing the history of electronic files, click the + (plus) sign next to **Receiver(s)/Date(s)**.
- 3 Click the + (plus) sign next to the date that you want to view.
- 4 Left-click and then right-click on a receiver format or insurance carrier and select **Batch Detail**.



- 5 Click **View Data** to view a receiver's data file.

OR

Click **View List** to view and print a list of claims and charge amounts.



► **To reprocess insurance claims**

- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 2 Click the **Billing History** icon.
- 3 Complete one of the following actions, depending on your situation:
 - If you are reprocessing a print image file, click the + (plus) sign next to **Print CMS(s)/Date(s)**.
 - If you are reprocessing an electronic file, click the + (plus) sign next to **Receiver(s)/Date(s)**.
- 4 Click on the + (plus) sign next to a date.
- 5 Click on a receiver format or insurance carrier.
- 6 Complete one of the following actions, depending on your situation:
 - Left-click and then right-click on an insurance carrier in the left side of the window and select **Re-Open All**.
 - Left-click and then right-click on an individual claim on the right side of the window and select **Open CMS**.
- 7 Go to [Correcting Errors in Insurance Claims on page 347](#), [Recording Additional Information on the CMS 1500 Form & ANSI File on page 349](#), or [Exporting Insurance Claims on page 358](#) to revise and reprocess your claim.

Releasing & Closing Claims on Hold

This section tells you how to release and close claims on hold, including how to

- [To release claims on hold, 366](#)
- [To close claims on hold, 367](#)

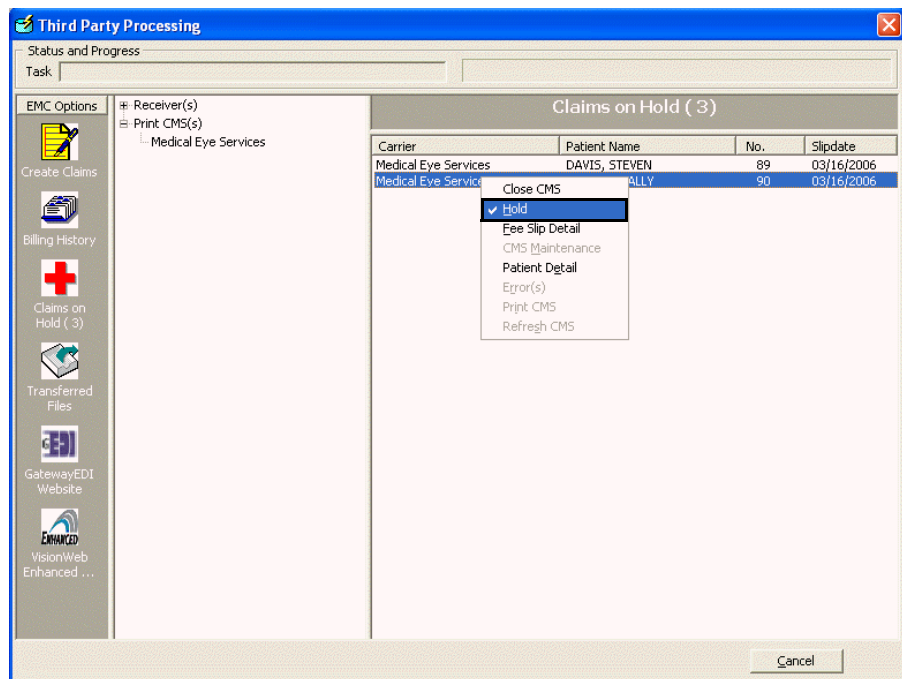
► To release claims on hold

- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 2 Click the **Claims on Hold** icon.
- 3 Complete one of the following actions, depending on your situation:
 - If you are releasing print image file claims that are on hold, click the + (plus) sign next to **Print CMS(s)**.
 - If you are releasing electronic file claims that are on hold, click the + (plus) sign next to **Receiver(s)**.

- 4 Complete one of the following actions, depending on your situation:
 - If you are releasing a group of claims that are on hold, left-click and then right-click on an insurance carrier in the left side of the window and select **Re-Open All**.
 - If you are releasing one claim that is on hold, click on an insurance carrier on the left side of the window, left-click on a patient on the right side of the window, and then right-click on the patient and select **Hold**.

Note

Press and hold the **Ctrl** or **Shift** key to select multiple patient insurance claims.



The insurance claim(s) can be selected again the next time you select claims for processing. For more information on selecting insurance claims, go to [Selecting Insurance Claims on page 346](#).

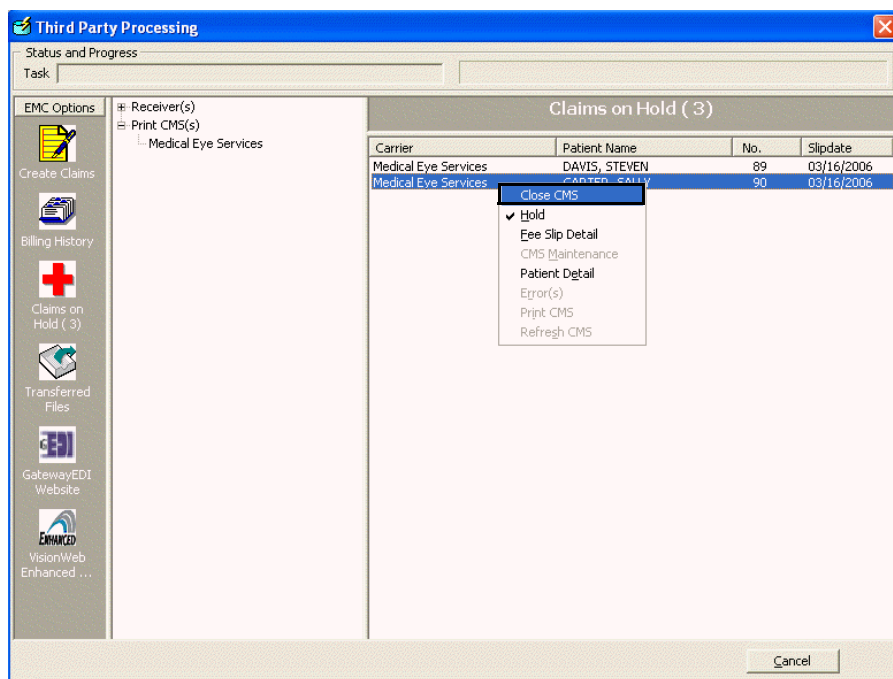
► **To close claims on hold**

- 1 Open the Third Party Processing window. For more information on opening this window, go to [Opening the Third Party Processing Window on page 345](#).
- 2 Click the **Claims on Hold** icon.
- 3 Complete one of the following actions, depending on your situation:
 - If you are closing print image file claims that are on hold, click the + (plus) sign next to **Print CMS(s)**.
 - If you are closing electronic file claims that are on hold, click the + (plus) sign next to **Receiver(s)**.
- 4 Click on an insurance carrier on the left side of the window.

- 5 Left-click on a patient on the right side of the window and then right-click on the patient and select **Close CMS**.

Note

Press and hold the **Ctrl** or **Shift** key to select multiple patient insurance claims.



The insurance claim(s) are removed from the Third Party Processing window. If you want to view or print a closed claim, open the CMS 1500 form from the Fee Slip window or the Insurance tab on the Patient Demographic window. For information on opening the CMS 1500 form from the Patient Demographic window, go to [To record insurance information on page 89](#). For more information on opening the CMS 1500 form from the Fee Slip window, go to [Viewing & Printing CMS 1500 Forms on page 203](#).

Note

You cannot edit and refresh closed insurance claims that you opened through the Insurance tab on the Patient Demographic window or Fee Slip window. To edit and refresh closed insurance claims, reopen the claims from the Billing History. For information on using the Billing History, go to [Receiving Insurance Claim Reports From McKesson on page 361](#).

CHAPTER 13

Creating & Printing Reports, Statements, & Graphs

In this chapter:

- Opening the Reports, Statements & Graphs Window, 370
- Adding & Removing Reports From Tabs, 370
- Creating & Printing Daily Reports, 375
- Creating & Printing Weekly Reports, 377
- Creating & Printing Monthly Reports, 380
- Creating & Printing Yearly Reports, 384
- Creating & Printing On Demand Reports, 386
- Creating & Printing Internal Marketing Reports, 388
- Creating & Printing Statements, 390
- Creating & Printing Graphs, 395
- Creating & Printing Business Analysis Reports, 397
- Viewing the Report History, 398
- List of Reports & Graphs, 401

You can create and print reports, statements, and graphs for analyzing your finances, reviewing your marketing strategies, and viewing your sales. You can produce reports daily, weekly, monthly, or on demand.

For more information on creating reports, see the “[OSSU 501 General Reports](#)” iTrain and the OSSU 500-1, “[Creating Reports & Processing Documents](#),” training course.

Notes

- Before you create and print reports, statements, and graphs, set up your security preferences for reports. For more information on setting up security preferences, go to [Customizing Security Preferences on page 62](#).
- OfficeMate suggests that you print the following audit reports on a daily or monthly basis to help you effectively manage your practice’s finances: [Accounts Receivable Variance](#), [Adjustment Register](#), [Applied Payment Register by Date](#), [Daily Production Summary](#), [Day Sheet Details](#), [Deposit Ticket](#), [Discount Register](#), [Fee Slip Detail](#), [Insurance Aging by Patient Detail](#), [Monthly Production Summary](#), [Patient Aging - Detail](#), [Production](#), [Returns And Refunds](#), and [Unapplied Amounts](#).
- Print reports, statements, and graphs using 8½” x 11” paper stock.

Opening the Reports, Statements & Graphs Window

Open the Reports, Statements & Graphs window using one of the following methods:

- Click the **Reports** icon.
- Click **Tasks** on the main window toolbar and select **Reports**.

Adding & Removing Reports From Tabs

This section tells you how to add and remove reports from the Daily, Weekly, Monthly, Yearly, On Demand, and Graphs tabs in the Reports, Statements & Graphs window, including how

- [To add reports to tabs, 370](#)
- [To remove reports from tabs, 374](#)

► To add reports to tabs

Note

You only need to add a report to a tab once; you do not need to add a report to a tab every time open the Reports, Statements & Graphs window.

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Daily**, **Weekly**, **Monthly**, **Yearly**, **On Demand**, or **Graphs** tab.
- 3 Click **Add**.
The **Report Listing** window opens.
- 4 Double-click on a report or select it and click **Select**.

Note

Click the **+** (plus sign) next to the report category to view and select the reports within the category. Press and hold the **Ctrl** or **Shift** key to select multiple reports. The reports are located in the following categories:

Aging

- Insurance Aging by Patient Summary
- Insurance Aging by Patient Detail
- Insurance Aging Summary
- Frame Aging
- Patient Aging - Detail
- Patient Aging - Summary

Commission

- Conversion Exception
- Provider Commission Detailed
- Provider Commission Summary

Documents

- Labels
- Post Card

Financial Transactions

- Accounts Receivable Variance
- Adjustment Register
- Applied Payment
- Applied Payment Register by Date
- Applied Payment Summary
- Billing History
- Daily Transaction Audit
- Day Sheet Details
- Day Sheet Summary
- Deposit Ticket
- Discount Register
- Fee Slip
- Fee Slip Audit
- Fee Slip Detail
- Fee Slips On Hold
- Open Charges
- Patient Credit Refund
- Receipts Journal
- Returns And Refunds
- Sales Tax
- Unapplied Amounts
- Void Fee Slip Register

Note,
cont.

Graph

Graph - Patients by Age
Graph - Patients by City
Graph - Patients by Gender
Graph - Patients by Insurance Type
Graph - Patients by Source
Graph - Patients by ZIP Code

Insurance Financial Transactions

Insurance Analysis
Insurance Audit
Insurance Chargeback
Insurance Revenue
Transferred Unapplied Ins. Amounts

Internal Marketing

Internal Marketing

Inventory

Inventory Adjustments
Inventory Profitability
Purchase Order Detailed
Purchase Order Summary
Order Recommendation
Product Transaction Details
Purchase Order
Stock Status

Lab Orders

Lab Orders
Lab Orders Outstanding
Lab Orders Received & Notified
Lab Orders Patient Notification
Lab Orders Patient Follow-Up
Re-Do Lab Orders

Lists

Contact Lens Listing
Diagnosis Code Listing
Frame Listing
Inactive Frames List
Ophthalmic Lens Listing
Other Product Listing
Service Listing

Note,
cont.

Patient Demographics

Bad Address List
Deleted Patients
New Patient Demographics
Patient Demographics
Patient List
Referrals

Product Sales

Contact Lens Sales by Patient
Frame Sales Detail by Manufacturer
Frame Sales Summary
Products Sold
Top Selling Frames - Detail
Top Selling Frames - Summary

Quick List

Patients In Quick List

Recalls

Patients w/No Recall Date
Patients w/Past Due Recall

Scheduler

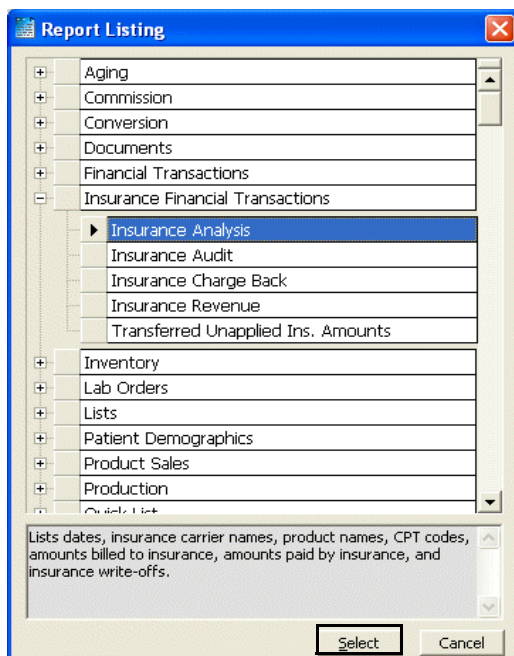
Appointment Schedule
Cancellations And No Shows

Setup Listings

Insurance Listing
Provider Listing
Vendor Listing

Statements

Statement



The report is added to the list of reports in the tab that you selected in step 2.

► To remove reports from tabs

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Daily, Weekly, Monthly, Yearly, On Demand, or Graphs** tab.
- 3 Click **Remove**.

The **Remove Reports** window opens.

- 4 Click **Yes**.



The report is removed from the list of reports in the tab that you selected in step 2.

Creating & Printing Daily Reports

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Add or remove reports from the list of reports. For more information on adding and removing reports, go to [Adding & Removing Reports From Tabs on page 370](#).
- 3 Click the **Alphabetically** or **By Category** radio button at the bottom of the window to view the list of reports alphabetically or categorically.
- 4 Select a report to create and print using one of the following methods:
 - Select the **Prt** check box next to the report that you want to create and print.
 - Click **Select All** to select all reports.

Note

Click **Unselect All** to deselect all reports.

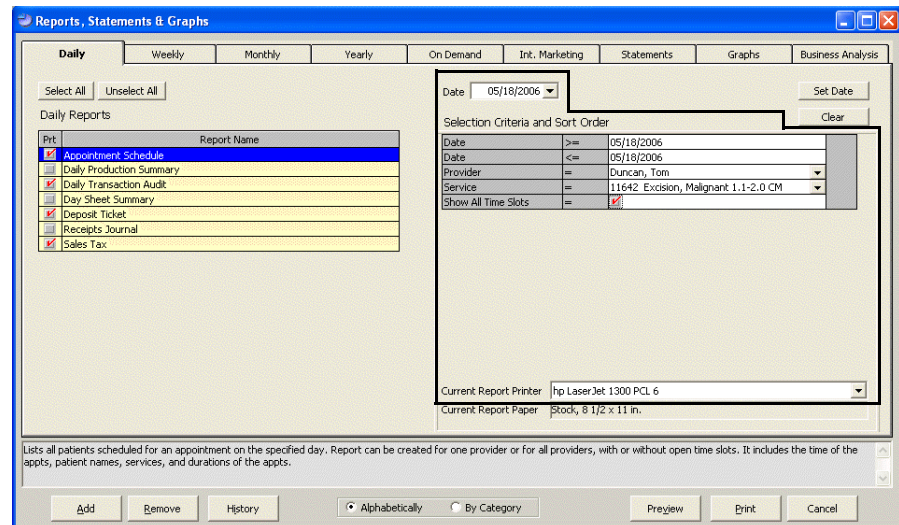
- 5 Type or select a date from the **Date** box and click **Set Date**.
The date in the Date box is transferred to the reports that have selection dates.

Note

The date in the Date box is automatically set to the current day.

- 6 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields for the report(s) that you are printing, go to the report(s) in the [List of Reports & Graphs on page 401](#).

- 7 Select a printer or fax program from the **Current Report Printer** drop-down menu.



- 8 Select a report and click **Preview** to preview the report. If you do not want to preview reports, go to step 10.

The **Preview Window** opens.

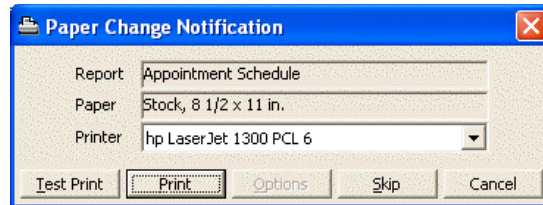
- 9 Complete one or more of the following tasks:
 - Click the **Print Report** icon to open the Print window and print the report using the current report printer.
 - Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.

Note

If you are exporting the report to a Microsoft Windows application, such as Excel, select the **MS Excel 97-2000 (Data Only)** format and **Disk file** destination in the Export window and click **OK**. Select the **Column width based on objects in the Details** radio button and *all* the check boxes in the Excel Format Options window and click **OK**.

- Close the Preview Window.
- 10 Click **Print** to print or fax the report(s).
The **Print Reports** window opens.
 - 11 Click **Yes** to print or fax all of the reports that you selected in step 4.
The **Paper Change Notification** window opens.
 - 12 Select a printer or fax program from the **Printer** drop-down menu.

- 13 Complete one or more of the following tasks:
- Click **Test Print** to print or fax a test page.
 - Click **Print** to print or fax the report(s).
 - Click **Skip** to skip printing or faxing the report and print or fax the next report that you selected.



Creating & Printing Weekly Reports

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Weekly** tab.
- 3 Add or remove reports from the list of reports. For more information on adding and removing reports, go to [Adding & Removing Reports From Tabs on page 370](#).
- 4 Click the **Alphabetically** or **By Category** radio button at the bottom of the window to view the list of reports alphabetically or categorically.

- 5 Select a report to create and print using one of the following methods:
 - Select the **Prt** check box next to the report that you want to create and print.
 - Click **Select All** to select all reports.

Note

Click **Unselect All** to deselect all reports.

The screenshot shows the 'Reports, Statements & Graphs' window. The 'Weekly' tab is active. In the 'Weekly Reports' section, there is a table with columns 'Prt' and 'Report Name'. The 'Prt' column has checkboxes for several reports: 'Adjustment Register' (checked), 'Applied Payment' (checked), 'Cancellations And No Shows' (unchecked), 'Discount Register' (unchecked), 'Fee Slip Audit' (unchecked), 'Fee Slip Detail' (unchecked), and 'Fee Slips On Hold' (checked). To the right, there are date selection fields: 'Date' (05/12/2006) and 'To' (05/18/2006), with a 'Set Dates' button. Below these are 'Selection Criteria and Sort Order' fields: 'Adjustment Date' with a '>= ' operator, another 'Adjustment Date' field, and 'Type' with a 'By Date' dropdown. At the bottom right, there are fields for 'Current Report Printer' (hp LaserJet 1300 PCL 6) and 'Current Report Paper' (Stock, 8 1/2 x 11 in.). At the bottom of the window, there are buttons for 'Add', 'Remove', 'History', 'Alphabetically', 'By Category', 'Preview', 'Print', and 'Cancel'. A small text box at the bottom left states: 'Lists adjustments to transactions in ascending date order. This report includes fee slip numbers, patient names, adjustment dates, amounts, recorded by names, adjustment types, and adjustment reasons.'

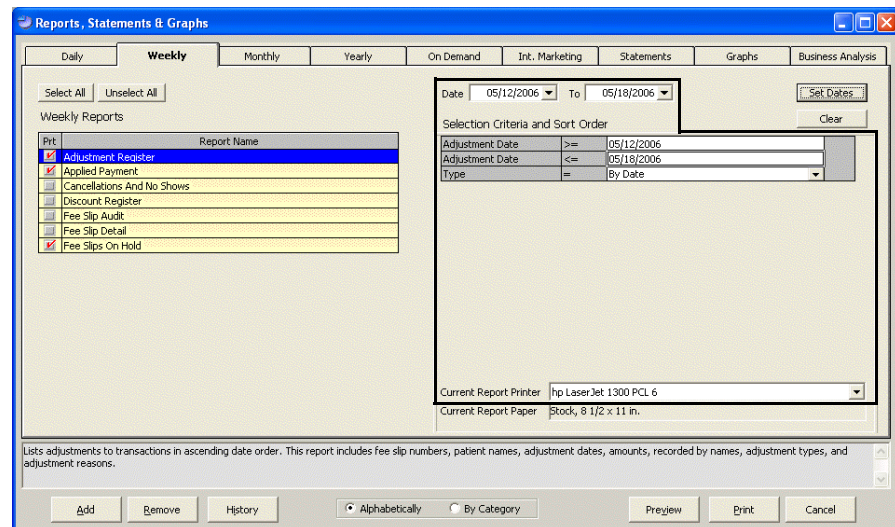
- 6 Type or select dates from the **Date** and **To** boxes and click **Set Dates**.
The date in the Date box is transferred to the reports that have selection dates.

Note

The date in the Date box is automatically set to seven days before the current day. The date in the To box is automatically set to the current day.

- 7 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields for the report(s) that you are printing, go to the report(s) in the [List of Reports & Graphs on page 401](#).

- 8 Select a printer or fax program from the **Current Report Printer** drop-down menu.



- 9 Select a report and click **Preview** to preview the report. If you do not want to preview reports, go to step 11.

The **Preview Window** opens.

- 10 Complete one or more of the following tasks:

- Click the **Print Report** icon to open the Print window and print the report using the current report printer.
- Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.

Note

If you are exporting the report to a Microsoft Windows application, such as Excel, select the **MS Excel 97-2000 (Data Only)** format and **Disk file** destination in the Export window and click **OK**. Select the **Column width based on objects in the Details** radio button and *all* the check boxes in the Excel Format Options window and click **OK**.

- Close the Preview Window.

- 11 Click **Print** to print or fax the report(s).

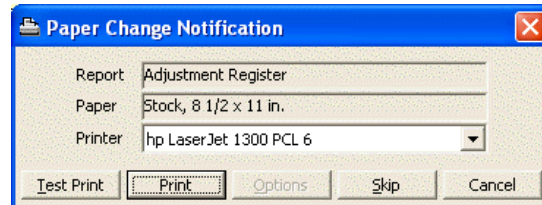
The **Print Reports** window opens.

- 12 Click **Yes** to print or fax all of the reports that you selected in step 5.

The **Paper Change Notification** window opens.

- 13 Select a printer or fax program from the **Printer** drop-down menu.

- 14 Complete one or more of the following tasks:
- Click **Test Print** to print or fax a test page.
 - Click **Print** to print or fax the report(s).
 - Click **Skip** to skip printing or faxing the report and print or fax the next report that you selected.



Creating & Printing Monthly Reports

This section tells you how to create and print monthly reports, including how

- [To create & print monthly reports, 380](#)
- [To balance accounts receivable, 383](#)

► To create & print monthly reports

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Monthly** tab.
- 3 Add or remove reports from the list of reports. For more information on adding and removing reports, go to [Adding & Removing Reports From Tabs on page 370](#).
- 4 Click the **Alphabetically** or **By Category** radio button at the bottom of the window to view the list of reports alphabetically or categorically.

- 5 Select a report to create and print using one of the following methods:
 - Select the **Prt** check box next to the report that you want to create and print.
 - Click **Select All** to select all reports.

NoteClick **Unselect All** to deselect all reports.

The screenshot shows the 'Reports, Statements & Graphs' dialog box. The 'Monthly' tab is selected. The 'Select All' button is highlighted. The 'Monthly Reports' list shows several reports with the 'Prt' checkbox checked. The 'Date' field is set to 04/18/2006 and the 'To' field is set to 05/18/2006. The 'Set Dates' button is visible. The 'Selection Criteria and Sort Order' section shows 'Period end' set to '<= (all)', 'Insurance Co.' set to '(all)', and 'Provider' set to '(all)'. The 'Sort Order' section shows 'Insurance Co.' and 'Patient Name' sorted by 'Sort A-Z'. The 'Current Report Printer' is 'hp LaserJet 1300 PCL 6' and the 'Current Report Paper' is 'Stock, 8 1/2 x 11 in.'.

- 6 Type or select dates from the **Date** and **To** boxes and click **Set Dates**.
The date in the Date box is transferred to the reports that have selection dates.

Note

The date in the Date box is automatically set to 30 days before the current day. The date in the To box is automatically set to the current day.

- 7 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields for the report(s) that you are printing, go to the report(s) in the [List of Reports & Graphs on page 401](#).

- 8 Select a printer or fax program from the **Current Report Printer** drop-down menu.

- 9 Select a report and click **Preview** to preview the report. If you do not want to preview reports, go to step 10.

The **Preview Window** opens.

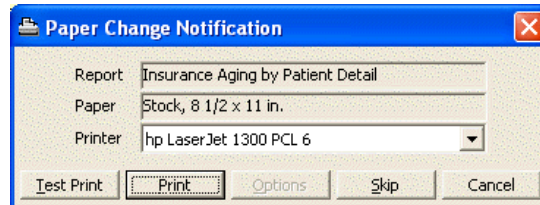
- 10 Complete one or more of the following tasks:
 - Click the **Print Report** icon to open the Print window and print the report using the current report printer.
 - Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.

Note

If you are exporting the report to a Microsoft Windows application, such as Excel, select the **MS Excel 97-2000 (Data Only)** format and **Disk file** destination in the Export window and click **OK**. Select the **Column width based on objects in the Details** radio button and *all* the check boxes in the Excel Format Options window and click **OK**.

- Close the Preview Window.
- 11 Click **Print** to print or fax the report(s).
The **Print Reports** window opens.
 - 12 Click **Yes** to print or fax all of the reports that you selected in step 5.
The **Paper Change Notification** window opens.
 - 13 Select a printer or fax program from the **Printer** drop-down menu.

- 14 Complete one or more of the following tasks:
- Click **Test Print** to print or fax a test page.
 - Click **Print** to print or fax the report(s).
 - Click **Skip** to skip printing or faxing the report and print or fax the next report that you selected.



► To balance accounts receivable

- 1 Establish a “Beginning Balance” amount using the following instructions:
 - a. Create the Patient Aging Summary report for the prior period.
 - b. Create the Insurance Aging Summary report for the prior period.
 - c. Add the totals from the Patient Aging Summary report and the Insurance Aging Summary report for the prior period.
 - d. Create the Accounts Receivable Variance report for the prior period and add this total to the total from step c.
- 2 Create the Patient Aging Summary report for the current period.
- 3 Create the Insurance Aging Summary report for the current period.
- 4 Create the Accounts Receivable Variance report for the current period.
- 5 Add the totals of the reports you created in steps 2–4; this new total is the “New Adjusted A/R Balance” amount.
- 6 Verify the new open A/R balance using the following instructions:
 - a. Create the Monthly Production Summary report for the current period.
 - b. Add the “Net Change to A/R” amount to the “Beginning Balance.”
 - c. Ensure that the total from step b is the same as the “New Adjusted A/R Balance” amount.

Creating & Printing Yearly Reports

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Yearly** tab.
- 3 Add or remove reports from the list of reports. For more information on adding and removing reports, go to [Adding & Removing Reports From Tabs on page 370](#).
- 4 Click the **Alphabetically** or **By Category** radio button at the bottom of the window to view the list of reports alphabetically or categorically.
- 5 Select a report to create and print using one of the following methods:
 - Select the **Prt** check box next to the report that you want to create and print.
 - Click **Select All** to select all reports.

Note Click **Unselect All** to deselect all reports.

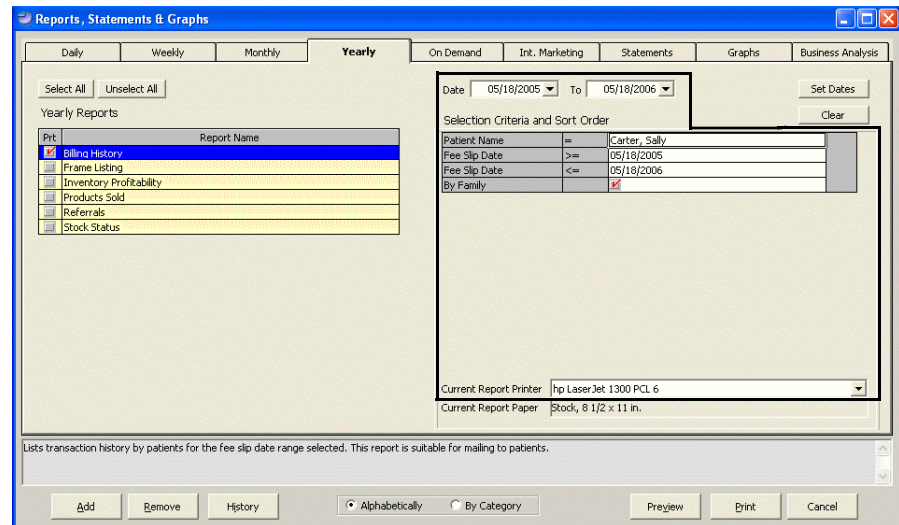
The screenshot shows the 'Reports, Statements & Graphs' window with the 'Yearly' tab selected. The 'Select All' button is highlighted. The 'Prt' checkbox is checked for 'Billing History'. The date range is set from 05/18/2005 to 05/18/2006. The 'Selection Criteria and Sort Order' section is empty. The 'Current Report Printer' is set to 'hp LaserJet 1300 PCL 6' and the 'Current Report Paper' is 'Stock, 8 1/2 x 11 in.'.

- 6 Type or select dates from the **Date** and **To** boxes and click **Set Date**.
The date in the Date box is transferred to the reports that have selection dates.

Note The date in the Date box is automatically set to one year before the current day. The date in the To box is automatically set to the current day.

- 7 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields for the report(s) that you are printing, go to the report(s) in the [List of Reports & Graphs on page 401](#).

- 8 Select a printer or fax program from the **Current Report Printer** drop-down menu.



- 9 Select a report and click **Preview** to preview the report. If you do not want to preview reports, go to step 11.

The **Preview Window** opens.

- 10 Complete one or more of the following tasks:

- Click the **Print Report** icon to open the Print window and print the report using the current report printer.
- Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.
- Close the Preview Window.

- 11 Click **Print** to print or fax the report(s).

The **Print Reports** window opens.

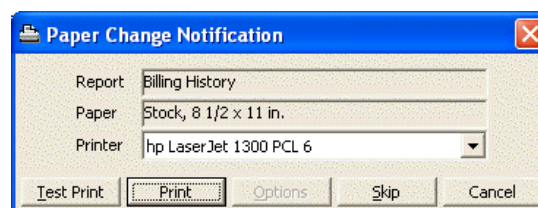
- 12 Click **Yes** to print or fax all of the reports that you selected in step 5.

The **Paper Change Notification** window opens.

- 13 Select a printer or fax program from the **Printer** drop-down menu.

- 14 Complete one or more of the following tasks:

- Click **Test Print** to print or fax a test page.
- Click **Print** to print or fax the report(s).
- Click **Skip** to skip printing or faxing the report and print or fax the next report that you selected.

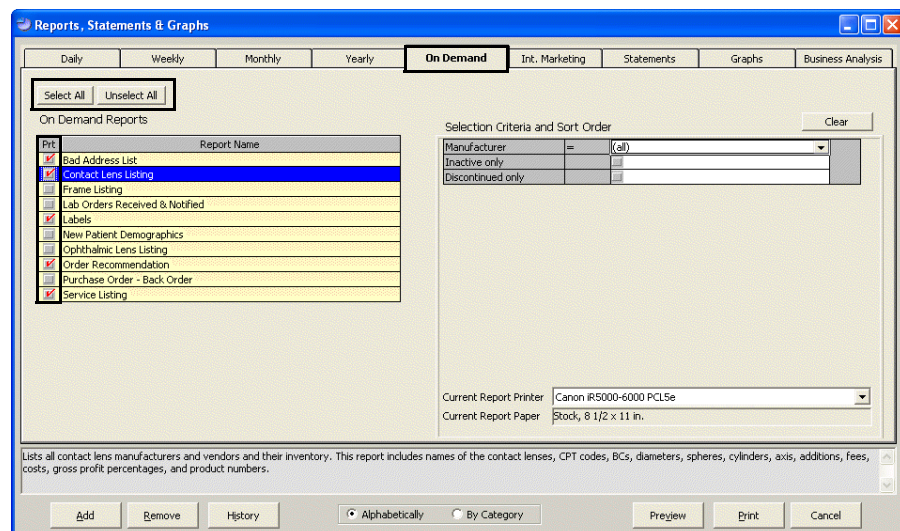


Creating & Printing On Demand Reports

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **On Demand** tab.
- 3 Add or remove reports from the list of reports. For more information on adding and removing reports, go to [Adding & Removing Reports From Tabs on page 370](#).
- 4 Click the **Alphabetically** or **By Category** radio button at the bottom of the window to view the list of reports alphabetically or categorically.
- 5 Select a report to create and print using one of the following methods:
 - Select the **Prt** check box next to the report that you want to create and print.
 - Click **Select All** to select all reports.

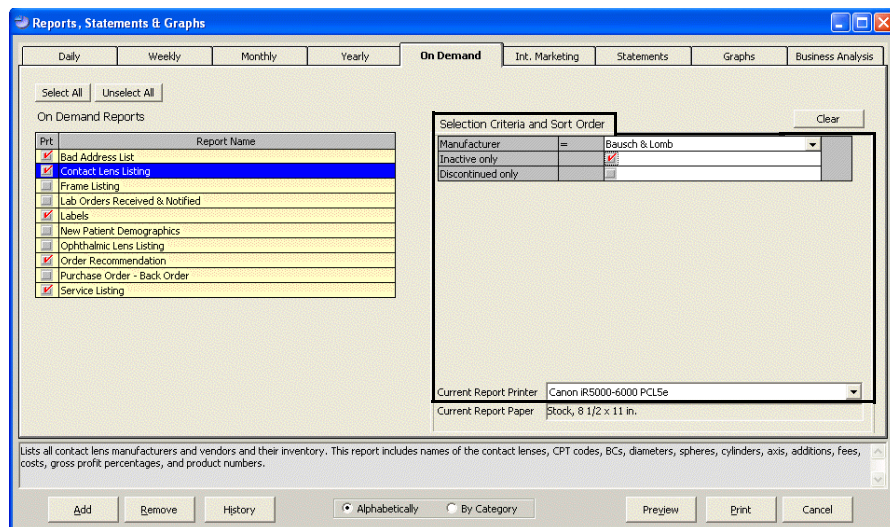
Note

Click **Unselect All** to deselect all reports.



- 6 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields for the report(s) that you are printing, go to the report(s) in the [List of Reports & Graphs on page 401](#).

- 7 Select a printer or fax program from the **Current Report Printer** drop-down menu.



- 8 Select a report and click **Preview** to preview the report. If you do not want to preview reports, go to step 10.

The **Preview Window** opens.

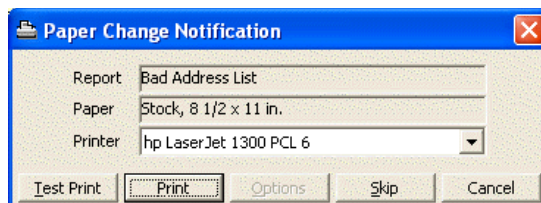
- 9 Complete one or more of the following tasks:
- Click the **Print Report** icon to open the Print window and print the report using the current report printer.
 - Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.

Note

If you are exporting the report to a Microsoft Windows application, such as Excel, select the **MS Excel 97-2000 (Data Only)** format and **Disk file** destination in the Export window and click **OK**. Select the **Column width based on objects in the Details** radio button and *all* the check boxes in the Excel Format Options window and click **OK**.

- Close the Preview Window.
- 10 Click **Print** to print or fax the report(s).
The **Print Reports** window opens.
- 11 Click **Yes** to print or fax all of the reports that you selected in step 5.
The **Paper Change Notification** window opens.
- 12 Select a printer or fax program from the **Printer** drop-down menu.

- 13 Complete one or more of the following tasks:
- Click **Test Print** to print or fax a test page.
 - Click **Print** to print or fax the report(s).
 - Click **Skip** to skip printing or faxing the report and print or fax the next report that you selected.



Creating & Printing Internal Marketing Reports

Notes

- Print internal marketing reports using 8½" x 11" paper stock.
- Print labels using Avery 5260 compatible white rectangular labels. You can purchase these labels from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com.
- Print postcards using postcard stock with four cards on 8½" x 11" sheets. You can purchase postcards from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com or from Marchon Eyewear at 1.800.645.1300.

For more information on creating internal marketing reports, see the "OSSU 502 Process & Analysis Reports" iTrain and the OSSU 500-1, "Creating Reports & Processing Documents," training course.

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Internal Marketing** tab.

- 3 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields, go to [Internal Marketing on page 431](#).

Note

Click **Expand** to expand the Selection Criteria and view the entire list.

The screenshot shows the 'Reports, Statements & Graphs' application window. The 'Int. Marketing' tab is selected. On the left, under 'Internal Marketing', there is a list with 'Internal Marketing' selected. On the right, the 'Selection Criteria and Sort Order' section is expanded, displaying a table of criteria and their values:

Birth Month	=	January
Birthdate	>=	12/12/1980
Birthdate	<=	12/12/1990
Cash Only	=	No
CPT Billed	{ }	66830 - Removal of Secondary Membrane
		66920 - ICCE, Removal of Lens/Intrapsular
		66940 - Unplanned Extrapsular Extraction
		67003 - Anterior Vitrectomy, Partial/Open
Credit Card Expire	>=	
Credit Card Expire	<=	
Credit Card Type	{ }	Visa
Credit Limit	=	No
Diagnosis Code Billed	{ }	378.32
		378.42

Below the table, the 'Current Report Printer' is set to 'hp LaserJet 1300 PCL 6' and the 'Current Report Paper' is 'Letterhead, 8 1/2 x 11 in.'. At the bottom, there are buttons for 'Add', 'Remove', 'History', 'Preview', 'Print', and 'Cancel'.

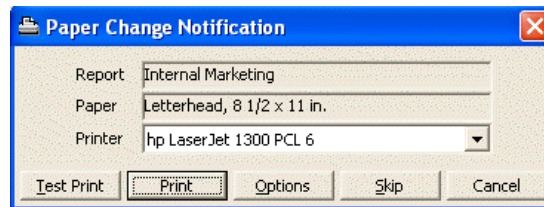
- 4 Select a printer or fax program from the **Current Report Printer** drop-down menu.
- 5 Click **Preview** to preview the report. If you do not want to preview the report, go to step 10.
The **Preview Window** opens.
- 6 Complete one or more of the following tasks:
 - Click the **Print Report** icon to open the Print window and print the report using the current report printer.
 - Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.

Note

If you are exporting the report to a Microsoft Windows application, such as Excel, select the **MS Excel 97-2000 (Data Only)** format and **Disk file** destination in the Export window and click **OK**. Select the **Column width based on objects in the Details** radio button and *all* the check boxes in the Excel Format Options window and click **OK**.

- Close the Preview Window.
- 7 Click **Print** to print or fax the report.
The **Print Reports** window opens.
 - 8 Click **Yes** to print or fax the report.
The **Paper Change Notification** window opens.

- 9 Select a printer or fax program from the **Printer** drop-down menu.
- 10 Complete one or more of the following tasks:
 - Click **Test Print** to print or fax a test page.
 - Click **Print** to print or fax the report.
 - Click **Options** to open the Print Options window and select or deselect letter, listing, and label print options.



Note If you are printing letters, select a letter from the Correspondence Choices window and click **OK**.

Creating & Printing Statements

For more information on creating statements, see the "OSSU 502 Process & Analysis Reports" iTrain and the OSSU 500-1, "Creating Reports & Processing Documents," training course.

This section tells you how to create and print statements, including how

- [To create & print Statements, 390](#)
- [To calculate finance charges, 394](#)

► To create & print Statements

Notes

- To define and change your Statements report preferences, go to [To define and change statement preferences on page 72](#).
- Mail statements using #10 single window envelopes, #10 standard envelopes, or the Envelope for OfficeMate Statements/Invoices. Use #9 standard envelopes as return envelopes. You can purchase the Envelopes for OfficeMate Statements/Invoices from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Statements** tab.
- 3 Type or select dates from the **Date** box and click **Set Date**.
The date in the Date box is transferred to the Statements report.

Note The date in the Date box is automatically set to the current day.

- 4 If you are calculating and applying late charges, follow the instructions below; otherwise, go to step 5.

Note

To define and change your late charge preferences from within the System Preferences window, go to [To define and change statement preferences on page 72](#).

- Click the **Calculate late charges** check box.
- If you did *not* define your late charge preferences in the System Preferences window, skip this step and go to step c. If you already defined your late charge preferences, click **Preview** to view, print, and export the Late Charge List; click **Apply/Record** to record the late charges on the Patient Ledger window; and go to step 5.
- Type the late charge amount in the **Late Charge Amount \$** text box.
- Type the amount at which the late charge will be applied in the **Apply if Balance >=** text box. Late charges will be applied if the balance is greater than or equal to the amount in this text box.
- Type the number of grace period days in the **Grace Period (# days)** text box.
- Type the late charge description in the **Late charge description** text box.
- Select the **Fee Slip Date** or **Transfer Date** radio button to calculate late charges for insurance transfers using the fee slip date or transfer date.
- Click **Preview** to view, print, and export the Late Charge List.
- Click **Apply/Record** to record the late charges on the Patient Ledger window.

Reports, Statements & Graphs

Daily Weekly Monthly Yearly On Demand Int. Marketing **Statements** Graphs Business Analysis

☒ **Calculate late charges**

Late Charge Amount \$ \$20.00 Preview

Apply if Balance >= \$ \$50.00 Apply/Record

Grace Period (# days) 30

Late charge description Billing Fee

Calculate Late Charges for Insurance Transfers Using

☒ Fee Slip Date ☐ Transfer Date

☒ **Calculate finance charges**

Monthly Percentage 0 Preview

Grace Period (# days) 30 Apply/Record

Finance charge description Finance Charge

Calculate Finance Charges for Insurance Transfers Using

☒ Fee Slip Date ☐ Transfer Date

Print this message at bottom of Statement

Thank you for your confidence and trust.

Payment due date 08/21/2002

Date 05/18/2006 Set Date

Selection Criteria and Sort Order

Field	Criteria
Patient Name	=
Last Name	>=
Last Name	<=
By Family	<input checked="" type="checkbox"/>
Period end	=

Sort Order

Sort Field Name	Sort A-Z	Sort Z-A
Patient Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ZIP Code	<input type="checkbox"/>	<input type="checkbox"/>

Current Report Printer No LaserJet 1300 PCL 6

Current Report Paper Stock, 8 1/2 x 11 in.

Prints statements for all patients with outstanding balances. Select to print the information on a 30, 60, or 90+ day delinquent statement. This report lists all charges that are still open. A payment coupon is printed on the last page.

Add Remove History Preview Print Cancel

- 5 If you are calculating and applying finance charges, follow the instructions below; otherwise, go to step 6.

Note

To define and change your finance charge preferences from within the System Preferences window, go to [To define and change statement preferences on page 72](#).

- Click the **Calculate finance charges** check box.
- If you did *not* define your finance charge preferences in the System Preferences window, skip this step and go to step c. If you already defined your finance charge preferences, click **Preview** to view, print, and export the Finance Charge List; click **Apply/Record** to record the finance charges on the Patient Ledger window; and go to step 6.
- Type the monthly finance charge percentage in the **Monthly Percentage** text box.
- Type the number of grace period days in the **Grace Period (# days)** text box.
- Type the finance charge description in the **Finance charge description** text box.
- Select the **Fee Slip Date** or **Transfer Date** radio button to calculate late charges for insurance transfers using the fee slip date or transfer date.
- Click **Preview** to view, print, and export the Finance Charge List.
- Click **Apply/Record** to record the finance charges on the Patient Ledger window.

- Type the message that you want to print at the bottom of the Statements reports in the **Print this message at bottom of Statement** text box.
- Type or select the payment due date from the **Payment due date** drop-down menu.

- 8 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields, go to [Statements on page 463](#).

The screenshot shows the 'Reports, Statements & Graphs' window with the 'Statements' tab selected. The 'Calculate late charges' section is checked, with a late charge amount of \$20.00 and a grace period of 30 days. The 'Calculate finance charges' section is also checked, with a monthly percentage of 10% and a grace period of 30 days. The 'Selection Criteria and Sort Order' section is highlighted with a red box, showing fields for Patient Name, Last Name, By Family, and Period end. The 'Sort Order' section is also highlighted, showing fields for Patient Name and ZIP Code. The 'Current Report Printer' is set to 'hp LaserJet 1300 PCL 6'.

- 9 Select a printer or fax program from the **Current Report Printer** drop-down menu.
- 10 Click **Preview** to preview the report. If you do not want to preview the report, go to step 12.
- The **Preview Window** opens.
- 11 Complete one or more of the following tasks:
- Click the **Print Report** icon to open the Print window and print the report using the current report printer.
 - Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.

Notes

- If you are creating an export file to submit to your vendor, export the statement using the Separated Values (CSV) format.
- If you are exporting the report to a Microsoft Windows application, such as Excel, select the **MS Excel 97-2000 (Data Only)** format and **Disk file** destination in the Export window and click **OK**. Select the **Column width based on objects in the Details** radio button and *all* the check boxes in the Excel Format Options window and click **OK**.

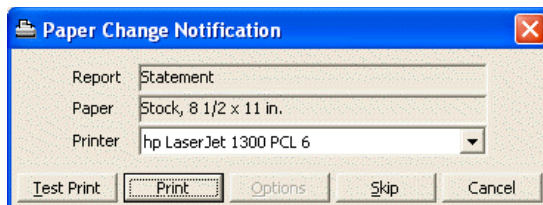
- Close the Preview Window.

- 12 Click **Print** to print or fax the report.

The **Paper Change Notification** window opens.

- 13 Select a printer or fax program from the **Printer** drop-down menu.

- 14 Complete one or more of the following tasks:
- Click **Test Print** to print or fax a test page.
 - Click **Print** to print or fax the report.



► To calculate finance charges

Use the following example to learn how to calculate OfficeMate finance charges:

Parameters

Fee Slip Posting Date: 02/19/2005

(Monthly) Finance Charge: 7%

Grace Period: 30 days

Fee Slip Balance: \$62.16

To calculate the finance charge on 12/19/2005:

- 1 Calculate the daily finance charge.

$$= (\text{Percentage entered}) * (\# \text{ of Days Past Due} - \text{Grace Period} - \text{Days Excluded}) / 30$$

$$= (7/100) * (303-30-0) / 30 = 0.637$$
- 2 Multiply the daily finance charge and the balance.

$$= 0.637 * 62.16$$

$$= 39.59592$$

Rounded to 39.60

To calculate the number of days past due:

If the finance charge was never calculated on the past due item, subtract the number of days between the posting date of the balance and the current date.

If the finance charge was already calculated on the past due item, subtract the number of days between the date the finance charge was last calculated and the current date.

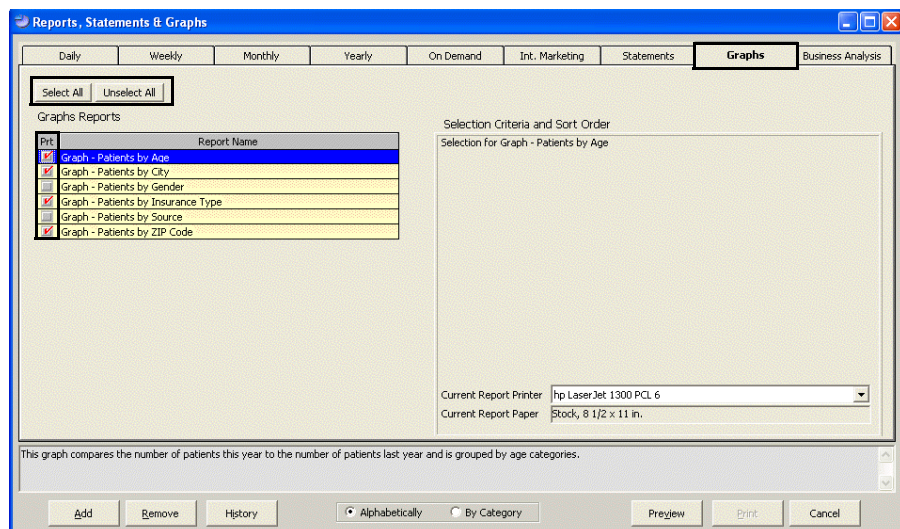
Creating & Printing Graphs

For more information on creating graphs, see the “OSSU 502 Process & Analysis Reports” iTrain and the OSSU 500-1, “Creating Reports & Processing Documents,” training course.

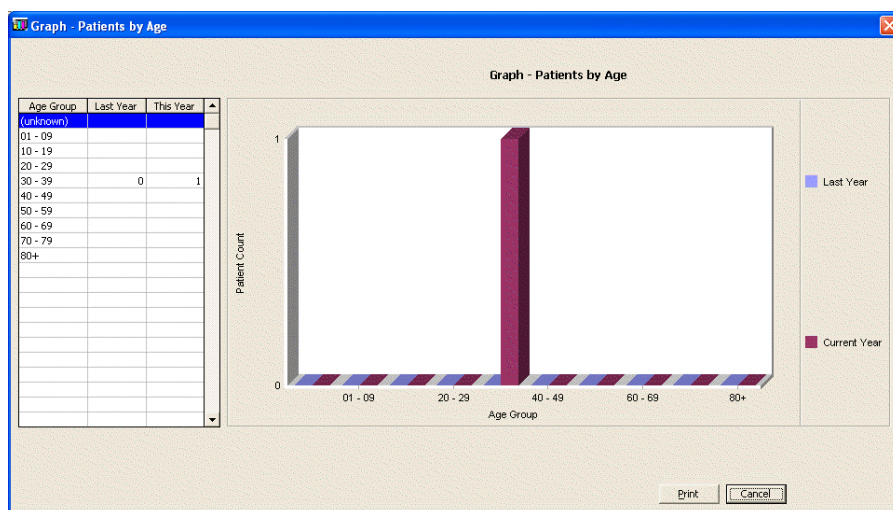
- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Add or remove graphs from the list of graphs. For more information on adding and removing reports, go to [Adding & Removing Reports From Tabs on page 370](#).
- 3 Click the **Alphabetically** or **By Category** radio button at the bottom of the window to view the list of graphs alphabetically or categorically.
- 4 Select a graph to create and print using one of the following methods:
 - Select the **Prt** check box next to the graph that you want to create and print.
 - Click **Select All** to select all graphs.

Note

Click **Unselect All** to deselect all graphs.



- 5 Select a report and click **Preview** to preview and print the graph.
The **Graph** window opens.



- 6 Click **Print** to print the graph using the current report printer.

Creating & Printing Business Analysis Reports

For more information on creating business analysis reports, see the “OSSU 502 Process & Analysis Reports” iTrain and the OSSU 500-1, “Creating Reports & Processing Documents,” training course.

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click the **Business Analysis** tab.
- 3 Add or remove reports from the list of reports. For more information on adding and removing reports, go to [Adding & Removing Reports From Tabs on page 370](#).
- 4 Click the **Alphabetically** or **By Category** radio button at the bottom of the window to view the list of reports alphabetically or categorically.
- 5 Select a report to create and print using one of the following methods:
 - Select the **Prt** check box next to the report that you want to create and print.
 - Click **Select All** to select all reports.

Note Click **Unselect All** to deselect all reports.

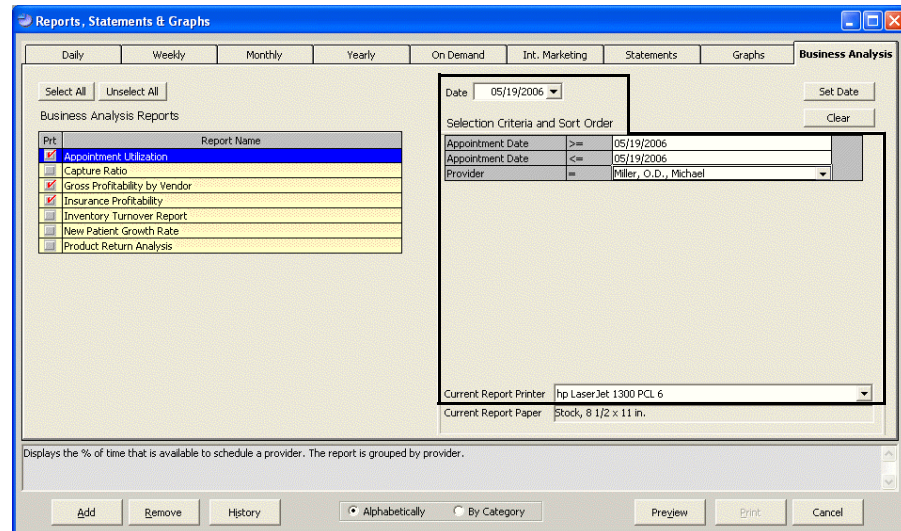
The screenshot shows the 'Reports, Statements & Graphs' window with the 'Business Analysis' tab selected. At the top, there are tabs for Daily, Weekly, Monthly, Yearly, On Demand, Int. Marketing, Statements, Graphs, and Business Analysis. Below the tabs, there are buttons for 'Select All' and 'Unselect All'. A list of reports is shown with checkboxes in the 'Prt' column. The 'Appointment Utilization' report is selected. To the right of the list is a 'Date' box set to '05/19/2006' and a 'Set Date' button. Below the list is a 'Selection Criteria and Sort Order' section with fields for 'Appointment Date' and 'Appointment Date', and a 'Provider' dropdown set to '(all)'. At the bottom, there are fields for 'Current Report Printer' (hp LaserJet 1300 PCL 6) and 'Current Report Paper' (Stock, 8 1/2 x 11 in.). At the very bottom, there are buttons for 'Add', 'Remove', 'History', 'Alphabetically' (selected), 'By Category', 'Preview', 'Print', and 'Cancel'.

- 6 Type or select dates from the **Date** box and click **Set Date**.
The date in the Date box is transferred to the reports that have selection dates.

Note The date in the Date box is automatically set to one year before the current day. The date in the To box is automatically set to the current day.

- 7 Complete the **Selections Criteria and Sort Order** fields with appropriate information. For more information on completing these fields for the report(s) that you are printing, go to the report(s) in the [List of Reports & Graphs on page 401](#).

- 8 Select a printer or fax program from the **Current Report Printer** drop-down menu.



- 9 Select a report and click **Preview** to preview the report.
The **Preview Window** opens.
- 10 Complete one or more of the following tasks:
 - Click the **Print Report** icon to open the Print window and print the report using the current report printer.
 - Click the **Export Report** icon to open the Export window and choose a format and destination for your exported report.
 - Close the Preview Window.

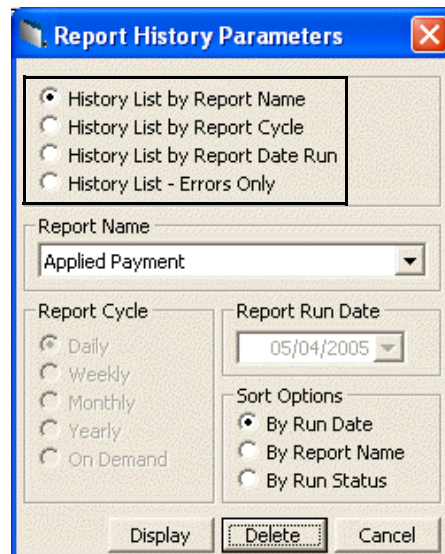
Viewing the Report History

Follow the instructions below to view when a report was created and whether or not the report was created successfully.

- 1 Open the Reports, Statements & Graphs window. For more information on opening this window, go to [Opening the Reports, Statements & Graphs Window on page 370](#).
- 2 Click **History**.

The **Report History Parameters** window opens.

- 3 Select one of the following parameters in which to view the report:
 - History List by Report Name
 - History List by Report Cycle
 - Report Date Run
 - History List - Errors Only



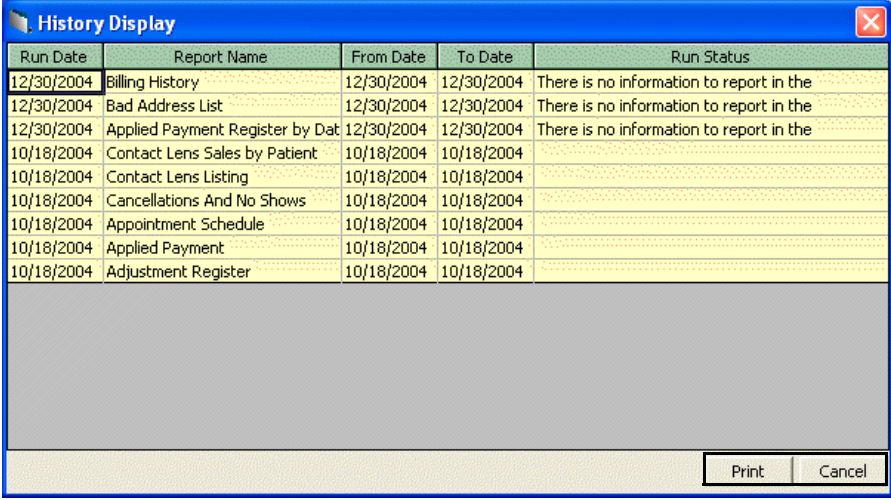
- 4 If you selected to view the history list by report name, select a report name from the **Report Name** drop-down menu.
- 5 If you selected to view the history list by report cycle, select an appropriate **Report Cycle** radio button.
- 6 If you selected to view the history list by date run, select or type a date in the **Date** box.
- 7 Select an appropriate **Sort Options** radio button.
- 8 Click **Display**.

The **History Display** window opens.

- 9 Click **Print** to print the history.

OR

Click **Cancel** to close the History Display window.



The screenshot shows a window titled "History Display" with a table of report history. The table has five columns: Run Date, Report Name, From Date, To Date, and Run Status. The first three rows show reports from 12/30/2004 with a status of "There is no information to report in the". The next six rows show reports from 10/18/2004 with empty status fields. At the bottom right of the window are "Print" and "Cancel" buttons.

Run Date	Report Name	From Date	To Date	Run Status
12/30/2004	Billing History	12/30/2004	12/30/2004	There is no information to report in the
12/30/2004	Bad Address List	12/30/2004	12/30/2004	There is no information to report in the
12/30/2004	Applied Payment Register by Dat	12/30/2004	12/30/2004	There is no information to report in the
10/18/2004	Contact Lens Sales by Patient	10/18/2004	10/18/2004	
10/18/2004	Contact Lens Listing	10/18/2004	10/18/2004	
10/18/2004	Cancellations And No Shows	10/18/2004	10/18/2004	
10/18/2004	Appointment Schedule	10/18/2004	10/18/2004	
10/18/2004	Applied Payment	10/18/2004	10/18/2004	
10/18/2004	Adjustment Register	10/18/2004	10/18/2004	

Note

Click **Delete** to delete the selected report history.

List of Reports & Graphs

This section lists all of the reports that you can create and print from within OfficeMate and the select criteria used to create them, including

- Accounts Receivable Variance, 404
- Adjustment Register, 405
- Applied Payment, 405
- Applied Payment Register by Date, 406
- Appointment Schedule, 407
- Appointment Utilization, 408
- Bad Address List, 408
- Billing History, 409
- Cancellations And No Shows, 409
- Capture Ratio, 410
- Contact Lens Listing, 410
- Contact Lens Sales by Patient, 411
- Conversion Exception, 412
- Daily Production Summary, 412
- Daily Transaction Audit, 414
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- Graph - Patients by Source, 424

- Graph - Patients by ZIP Code, 424
- Gross Profitability by Vendor, 424
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- Provider Commission Summary, 456
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Accounts Receivable Variance

The Accounts Receivable Variance report lists backdated payments and adjustments by a given date range. This information is needed to reconcile aging reports from month to month. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Accounts Receivable Variance report, set the date parameters.

06/01/2005 2:19:24 pm		Accounts Receivable Variance Report				
		Period end <= 05/01/2005				
Fee Slip	Line Item Date	Posting Date	Amount	Transaction Type	System Date	Recorded by
21	05/05/2005	04/05/2005	(40.00)	Patient Payment	05/05/2005	Franklin, Helen
Total Backdated Transactions			(40.00)			

Adjustment Register

The Adjustment Register report lists adjustments to transactions in ascending date order and includes fee slip numbers, patient names, adjustment dates, amounts, recorded by names, adjustment types, and adjustment reasons. OfficeMate suggests creating this report on a weekly basis.

- ❖ To create the Adjustment Register report, set the date parameters and then select a sort order type from the **Type** drop-down menu.

05/04/2005 4:34:19PM		Adjustment Register				
		Adjustment Date >= 04/28/2005				
		Adjustment Date <= 05/04/2005				
		Type = By Date				
Fee Slip	Patient	Date	Amount	Reason	Type	Recorded By
45	Radmore, Michelle	05/04/2005	(50.00)	ADJ-	Billing Error	Franklin, Helen
86	Carter, Sally	05/04/2005	(20.00)	ADJ-	Insurance Write-Off	Franklin, Helen
Total for 05/04/2005			(70.00)			
Total Adjustments			(70.00)			

Applied Payment

The Applied Payment report lists money received by each provider or combined providers and includes the total amount received for each service or product for the selected period. This report is grouped by product types and financial groups and also lists the total revenue percentage for the period and year-to-date totals. OfficeMate suggests creating this report on a weekly basis.

- ❖ To create the Applied Payment report, set the date parameters, select the **By Provider** check box if you want to sort the report by provider, and select a provider from the **Provider** drop-down menu.

05/04/2005 4:50:04PM		Applied Payment Report			
		Date >= 04/28/2005			
		Date <= 05/04/2005			
		By Provider			
Product Name	Description	Period Amount	%	Year-To-Date Amount	%
Miller, O.D., Michael					
Other					
*No Financial Group					
AR	Anti-reflective Coating	613.59	68.61	613.59	68.61
TINTPG	Tint - Plastic Gradient	280.71	31.39	280.71	31.39
Total *No Financial Group		894.30	100.00	894.30	100.00
Total Other		894.30	100.00	894.30	100.00
Total Payments Applied		894.30	100.00	894.30	100.00
Refunds & Non refundable adjustments					
Patient Refund		(75.00)		(75.00)	
Insurance Refund		0.00		0.00	
Non Refundable Adjustments		0.00		0.00	
Applied Payments w/ Refunds and Non-Refundable Adjustments		819.30		819.30	

Applied Payment Summary

The Applied Payment Summary report lists money received by each provider or combined providers and includes the total amount received for each service or product for the selected period. This report is grouped by payment method and also lists the total revenue percentage for the period and year-to-date totals. OfficeMate suggests creating this report on a weekly basis.

- ❖ To create the Applied Payment Summary report, set the date parameters.

05/05/2005 12:48:56PM		Applied Payment Summary	
		By Provider	
		Posting Date >= 04/29/2005	
		Posting Date <= 05/05/2005	
<u>Receipt Type</u>	<u>Date</u>		<u>Amount</u>
Michael Miller, O.D.			
Checks	05/04/2005		894.30
Patient Refund			(75.00)
Total for 05/04/2005			819.30
Provider Total			\$819.30
Report Total			\$819.30

Applied Payment Register by Date

The Applied Payment Register by Date report lists money received by each provider or combined providers and the dates money was received. This report includes the total amount received for each service or product for the selected period. It also lists the total revenue percentage for the period and year-to-date totals. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Applied Payment Register by Date report, set the date parameters.

05/05/2005 10:36:39AM		Applied Payment Register			
		By Posting Date			
		Posting Date >= 05/05/2004			
		Posting Date <= 05/05/2005			
<u>Patient</u>	<u>Fee Slip</u>	<u>Receipt No.</u>	<u>Product</u>	<u>Amount</u>	<u>Recorded By</u>
Posting Date 05/04/2005					
Patient Payments					
Mitchell, Henry A	70	87	AR	613.59	Franklin, Helen
Underwood, Jennifer	76	88	TINTPG	280.71	Franklin, Helen
Total Patient Payments				894.30	
Patient Refunds					
Carter, Sally	65	0	92014	(75.00)	Franklin, Helen
Total Patient Refunds				(75.00)	
Total for 05/04/2005				819.30	
Report Total				819.30	

Appointment Schedule

The Appointment Schedule report lists all patients scheduled for an appointment on the specified day. This report can be created for one provider or for all providers and with or without open time slots. It includes the time of the appointments, patient names, services, and durations of the appointments.

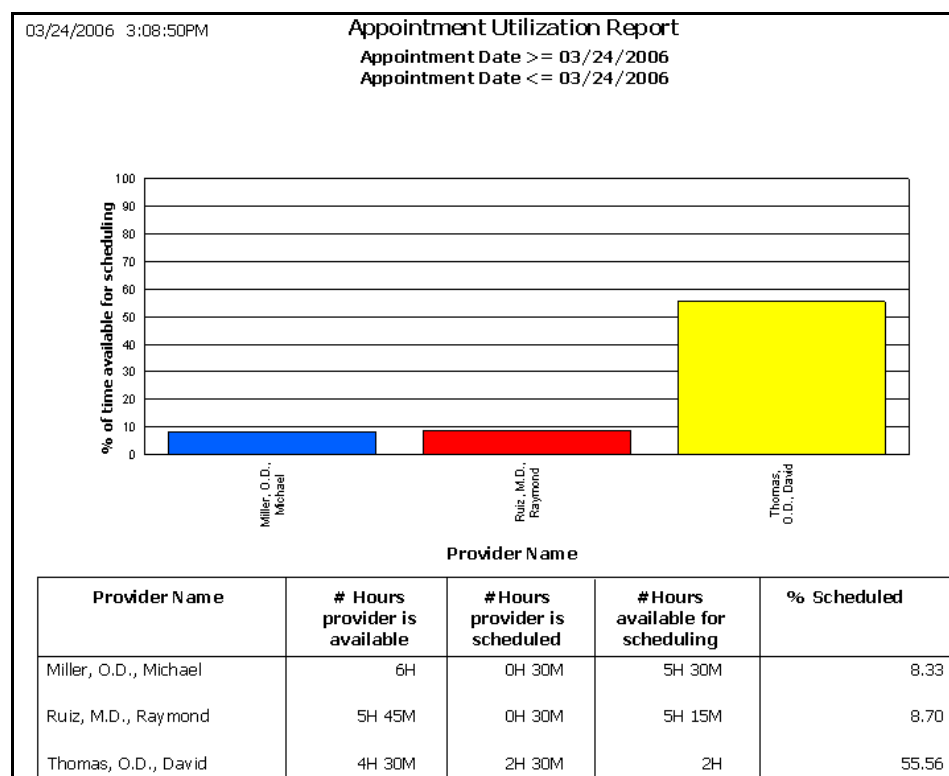
- ❖ To create the Appointment Schedule report, set the date parameters, select a provider from the **Provider** drop-down menu, select a service from the **Service** drop-down menu, and select the **Show All Time Slots** check box if you want all time slots to be displayed in the report. OfficeMate suggests creating this report on a daily basis.

05/05/2005 1:32:48PM		Appointment Schedule					
		Date >= 01/05/2005		Date <= 05/05/2005			
Date & Time	Pat #	Name	Phone	Reason	Min	Insurance	Provider
01/05/05 10:00 AM							
01/05/05 10:30 AM							
01/05/05 11:00 AM							
01/05/05 11:30 AM							
01/05/05 12:00 PM							
01/05/05 12:30 PM							
01/05/05 01:00 PM							
01/05/05 01:30 PM							
01/05/05 02:00 PM							
01/05/05 02:30 PM							
01/05/05 03:00 PM							
01/05/05 03:30 PM							
03/11/05 03:45 PM	10	Harper Cole	(949) 555-7896	Unspecified	15	Vision Service Plan	Miller, O.D., Michael
01/05/05 04:00 PM							
01/05/05 04:30 PM							
01/05/05 05:00 PM							
01/05/05 05:30 PM							
01/05/05 06:00 PM							
01/05/05 06:30 PM							
Total Appointments				1			
Total Estimated Minutes				15			

Appointment Utilization

The Appointment Utilization report displays the percent of time that has been scheduled for specific providers.

- ❖ To create the Appointment Utilization report, set the appointment date parameters and select a provider from the **Provider** drop-down menu.



Bad Address List

The Bad Address List report lists all patients who have the Bad Addr check box selected in the Patient Demographics window. This report includes patient names, addresses, cities, states, Zip codes, and phone numbers. OfficeMate suggests creating this report on demand.

05/05/2005 2:02:39PM

Bad Address Listing

Patient Name	Address	City	State	ZIP Code	Home Phone	Day Phone
Carter, Sally	9696 Calle Dulce	San Juan Capistrano	CA	92675	(949) 555-1236	
Underwood, James	49060 Pacific Heights Drive	Mission Viejo	CA	92692	(949) 555-8631	949 555 7800
Underwood, Jennifer	49060 Pacific Heights Drive	Mission Viejo	CA	92692	(949) 555-8631	
Underwood, Tracy	49060 Pacific Heights Drive	Mission Viejo	CA	92692	(949) 555-8631	

Total Bad Addresses: 4

Billing History

The Billing History report lists transaction history by patients for the fee slip date range selected. This report is suitable for mailing to patients. OfficeMate suggests creating this report on a yearly basis.

- ❖ To create the Billing History report, set the fee slip date parameters, click in the **Patient Name** field to find and select a patient, and select the **By Family** check box if you want to sort the report by family name.

OfficeMate Software Solutions 15375 Barranca Pkwy, Bldg L Irvine, CA 92618					Page: 1	
					Billing History	
					Date Printed	05/12/2005
					Statement Period	05/12/2004 thru 05/12/2005
					Provider Name	Michael Miller, O.D.
					Phone Number	949 727 7080
					License	4646-89
					Tax ID	66-456872
					TPA Number	345-454-234
To: Sally Carter 9696 Calle Dulce San Juan Capistrano, CA 92675						
Fee Slip No	Transaction Date	CPT	Diagnosis	Description	Insurance	Billed To Patient
Sally Carter						
86	04/02/2005			Adj: Billing Error		(20.00)
	04/27/2005	99211	367.1	Level I, Established	25.00	
	04/27/2005	92012		Exam - Intermediate Estab	65.00	
	04/27/2005	92012	367.1	Exam - Intermediate Estab	65.00	
	05/04/2005			Insurance Write-Off from Eye Care Plan Of Americ	(20.00)	
	05/09/2005			Insurance Payment - Ck #	(30.00)	
	05/09/2005			Insurance Payment - Ck #	(25.00)	
87	05/05/2005	A4262	053.22	Temporary Absorbable Plugs		
88	05/03/2005			VOIDED 05/05/2005		
92	05/09/2005	V2020	054.42	\IRLOCK 760/1	107.49	107.50
	05/09/2005			Patient Payment - Cash		(20.00)
					Total Due:	67.50

Cancellations And No Shows

The Cancellations And No Shows report lists all patients who have cancelled appointments or who did not show up for appointments. This report includes appointment dates and times, patient names, phone numbers, services, and providers. OfficeMate suggests creating this report on a weekly basis.

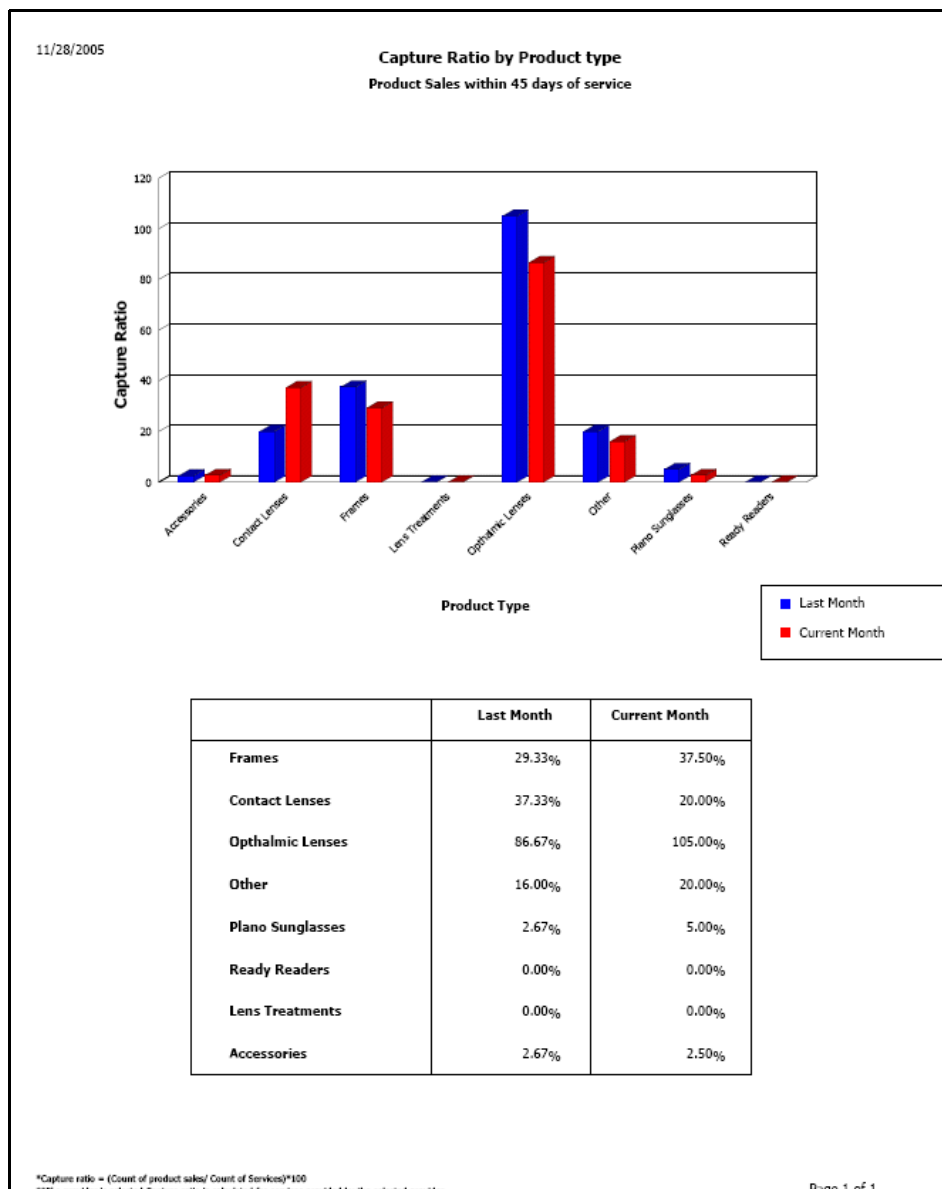
- ❖ To create the Cancellations And No Shows report, set the date parameters and choose the appropriate **Patient Name** and **Appointment Date** sort order.

05/05/2005 2:41:41PM		Cancellations and No Shows					
		Date >= 04/29/2004		Date <= 05/05/2005			
Cancelled Appointments							
Appt.	Patient	Phone	Service	Provider	Created	Updated	
03/11/05 02:30p	10 Harper Cole	(949) 555-7896	Unspecified	Miller, O.D., Michael	IANCMTABLET1	03/11/05 09:36a	IANCMTABLET1 03/11/05 09:37a
Total Cancelled Appointments		1					
No Show Appointments							
Appt.	Patient	Phone	Service	Provider	Created	Updated	
05/05/05 05:45p	3 Sally Carter	(949) 555-1236	Unspecified	Miller, O.D., Michael	MY	05/05/05 02:41p	MY 05/05/05 02:41p
Total No Show Appointments		1					
Total Appointments		2					
Total Estimated Minutes		30					

Capture Ratio

The Capture Ratio report displays the ratio of products purchased within a given time period after a service was performed.

- ❖ To create the Capture Ratio report, type the number of days within which products were purchased after a service was performed in the **Purchase within (# days)** text box, select a time period from the **Period for Comparison** drop-down menu, and select a provider from the **Provider** drop-down menu.



Contact Lens Listing

The Contact Lens Listing report lists all contact lens manufacturers and vendors and their inventory. This report includes names of the contact lenses, CPT codes, BCs,

diameters, spheres, cylinders, axis, additions, fees, costs, gross profit percentages, and product numbers. OfficeMate suggests creating this report on demand.

- ❖ To create the Contact Lens Listing report, select a manufacturer from the **Manufacturer** drop-down menu, select the **Inactive only** check box if you only want to display inactive contact lenses, and select the **Discontinued only** check box if you only want to display discontinued contact lenses.

Contact Lens Listing														
05/19/2006 10:52AM														
Manufacturer:														
Name	Description	CPT	BC	Dia	Sph	Cyl	Axis	Add	Fee	Cost	GP %	Product No	Active	Discontinued
Acuvue Gas Perm	Rigid Contact Lenses				Plano								True	False
Rigid Bitoric					Plano								True	False
Manufacturer: Bausch & Lomb														
Name	Description	CPT	BC	Dia	Sph	Cyl	Axis	Add	Fee	Cost	GP %	Product No	Active	Discontinued
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-9.00				90.00	50.00	44.4	733905100710	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-8.50				90.00	50.00	44.4	733905100673	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-8.00				90.00	50.00	44.4	733905100635	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-7.50				90.00	50.00	44.4	733905100598	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-6.50				90.00	50.00	44.4	733905100512	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-6.00				90.00	50.00	44.4	733905100475	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-5.75				90.00	50.00	44.4	733905100451	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-5.50				90.00	50.00	44.4	733905100437	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-5.25				90.00	50.00	44.4	733905100413	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-5.00				90.00	50.00	44.4	733905100390	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-4.75				90.00	50.00	44.4	733905100376	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-4.50				90.00	50.00	44.4	733905100352	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-4.25				90.00	50.00	44.4	733905100338	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-4.00				90.00	50.00	44.4	733905100314	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-3.75				90.00	50.00	44.4	733905100291	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-3.50				90.00	50.00	44.4	733905100277	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-3.25				90.00	50.00	44.4	733905100253	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-3.00				90.00	50.00	44.4	733905100239	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-2.75				90.00	50.00	44.4	733905100215	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-2.50				90.00	50.00	44.4	733905100192	True	False
Acuvue	Multipack Acuvue Lenses	92370	8.8	14.0	-2.25				90.00	50.00	44.4	733905100178	True	False

Contact Lens Sales by Patient

The Contact Lens Sales by Patient report lists fee slip dates, patient names, fee slip numbers, contact lens descriptions, and prices. OfficeMate suggests creating this report on demand.

- ❖ To create the Contact Lens Sales by Patient report, set the fee slip date parameters.

Contact Lens Sales by Patient									
05/05/2005 3:19:44PM									
Fee Slip Date >= 05/05/2004									
Fee Slip Date <= 05/05/2005									
Sales Date	Ref No	Patient Name	Fee Slip #	Qty	CL Description	UOM	Sale Price	Discount	Net Total
03/10/2005	234 34 5797	Cole, Harper	79	1	Multipack Acuvue Lenses	PACK	30.00	0.00	30.00
03/10/2005	234 34 5797	Cole, Harper	79	1	Multipack Acuvue Lenses	PACK	30.00	0.00	30.00
03/10/2005	234 34 5797	Cole, Harper	79	1	Bitoric RGP	EACH	140.00	0.00	140.00
03/10/2005	234 34 5797	Cole, Harper	79	1	Bitoric RGP	EACH	140.00	0.00	140.00
03/11/2005	234 34 5797	Cole, Harper	82	1	Multipack Acuvue Lenses	PACK	30.00	0.00	30.00
03/11/2005	234 34 5797	Cole, Harper	82	1	Multipack Acuvue Lenses	PACK	30.00	0.00	30.00
03/14/2005	234 34 5797	Cole, Harper	83	1	Multipack Acuvue Lenses	PACK	30.00	0.00	30.00
03/14/2005	234 34 5797	Cole, Harper	83	1	Multipack Acuvue Lenses	PACK	30.00	0.00	30.00
03/16/2005	234 34 5797	Cole, Harper	85	1	Acuvue	PACK	30.00	0.00	30.00
03/16/2005	234 34 5797	Cole, Harper	85	1	Acuvue	PACK	30.00	0.00	30.00
Totals:							520.00	0.00	520.00

Conversion Exception

The Conversion Exception report lists posting errors in backdated or changed fee slips. This report displays the actual dates on which items were recorded and the posting dates. OfficeMate suggests creating this report if you are upgrading from version 3.x.

- ❖ To create the Conversion Exception report, set the fee slip date parameters and select a sorting type from the **Type** drop-down menu.

Daily Production Summary

The Daily Production Summary lists a daily production summary organized by production category, discounts and adjustments, and collections and refunds. This report also includes today's fees and percentage total and month-to-date fees and percentage total. OfficeMate suggests creating this report on a daily basis.

- ❖ To create the Daily Production Summary report, set the date parameters, select the **By Provider** check box if you want to sort the report by providers, and select a provider from the **Provider** drop-down menu.

05/05/2005 4:12:09PM		Daily Production Summary			
		Selected Date 05/05/2005			
		By Provider			
		Today's Amount	% of Total	MTD Amount	% of Total
Miller, O.D., Michael					
Fee Summary by Production Group					
Existing Patient Refractions		69.00	100.00	69.00	100.00
Handwritten & No Group					
Gross Fees Invoiced		69.00	100.00	69.00	100.00
Discounts, Adjustments & Returns					
Adjustments				(70.00)	
Returns				(75.00)	
Total Discounts, Adjustments & Returns				(145.00)	
Net Fees					
Net Fees Invoiced		69.00		(76.00)	
Refunds					
Refunds				(75.00)	
Total Refunds				(75.00)	
Net Receipts		0.00		(75.00)	

Notes

- The Gross Fees Invoiced amount matches the Fee Slip Detail and Production reports.
- The Adjustments amount matches the Adjustment Register and Production reports and the Day Sheet report's Total Adjustments amount.
- The Discount amount matches the Discount Register report.
- The Returns amount matches the Product Return column on the Returns and Refunds report and the Sales Tax on Return amount minus the Discount on Return amount on the Daily Production report.
- The Sales Tax amount matches the Fee Slip Detail and Production reports.
- The Sales Tax on Return amount is also available on the Production report.
- The Net Fees Invoiced amount matches the Production Summary and Fee Slip Detail reports.
- The Deposits amount matches the Day Sheet, Deposit Ticket, and Production reports.
- The Refunds amount matches the Returns and Refunds and Production reports.

Daily Transaction Audit

The Daily Transaction Audit report lists all activity on a specific date. This report can display transactions grouped by providers. It includes patient names, fee slip numbers, transaction descriptions, and amounts. OfficeMate suggests creating this report on a daily basis.

- ❖ To create the Daily Transaction Audit report, set the date parameters, select the **By Provider** check box if you want to sort the report by providers, select a provider from the **Provider** drop-down menu, and select a recorded by user from the **Recorded by** drop-down menu. Also, choose the appropriate **Insurance Co / Patient Name** sort order.

11/13/2006 2:44:18PM		Daily Transaction Audit		
		Date >= 11/13/2005		
		Date <= 11/13/2006		
Insurance Co / Patient Name	Fee Slip/ Deposit No	Description	Recorded By	Amount
Carter, Sally M	79	Patient Payment - Cash(O)	Frankline, Helen	(50.00)
	85	Acuvue(O)	Frankline, Helen	30.00
	86	Acuvue(O)	Frankline, Helen	30.00
	87	AIRELON.R AF EV0018(O)	Frankline, Helen	160.99
	88	92020(O)	Frankline, Helen	25.00
	88	92070(O)	Frankline, Helen	0.00
	88	92012(O)	Frankline, Helen	65.00
	88	92014(O)	Frankline, Helen	130.00
	88	92020(O)	Frankline, Helen	25.00
	88	Multipack Acuvue Lenses(O)	Frankline, Helen	60.00
	88	Multipack Acuvue Lenses(O)	Frankline, Helen	60.00
	88	92020(O)	Frankline, Helen	25.00
	88	92081(O)	Frankline, Helen	15.00
	88	92070(O)	Frankline, Helen	0.00
	88	92015(O)	Frankline, Helen	20.00
	88	99204(O)	Frankline, Helen	120.00
	89	Patient Deposit - Cash(O)	Frankline, Helen	50.00
	89	Patient Deposit - Cash (U)	Frankline, Helen	50.00
	90	Patient Deposit - Cash(O)	Frankline, Helen	10.00
	90	Patient Deposit - Cash (U)	Frankline, Helen	10.00
	91	Patient Deposit - Cash(O)	Frankline, Helen	20.00
	91	Patient Deposit - Cash (U)	Frankline, Helen	20.00
Cole, Harper	68	Patient Payment - Cash(O)	Frankline, Helen	(50.00)
Posting Date 03/10/2006				
Patient				
Mitchell, Henry A	88	Patient Deposit - Unapplied Insurance Trans	Frankline, Helen	5.00

Note

An “O” appears next to original transactions and a “U” appears next to updated (modified) transactions.

Day Sheet Details

The Day Sheet Details report lists each patient or insurance transaction made on the selected posting date. Use this report to view money collected, fee slip charges made to patients and insurance, returns, refunds, and adjustments. This report is based on providers on fee slip line items. OfficeMate suggests creating this report on a daily basis.

- ❖ To create the Day Sheet Details report, set the date parameters, select the **By Provider** check box if you want to sort the report by providers, and select a

provider from the **Provider** drop-down menu. Also, choose the appropriate **Insurance Co / Patient Name** sort order.

05/06/2005 9:39:18AM		Day Sheet Details									
		(Based on provider on feeslip line item)									
		Selected Date 05/06/2005									
Provider	Insurance Co / Patient Name	Receipt / Fee Slip	Applied Receipts	Insurance Charge	Patient Charge	Applied Insurance Payment	Applied Patient Payment	Insur. Adjust.	Patient Return & Adjust.	Patient Refund	Receipt Type
Miller, O.D., Michael	Mitchell, Henry A	89		80.00	20.00						
Report Total			0.00	80.00	20.00	0.00	0.00	0.00	0.00	0.00	
Total Charges					100.00						
Total Applied Ins. & Pat. Payments					0.00						
Total Adjustments & Returns					0.00						
Total Patient Returns					0.00						
Total Patient Adjustments					0.00						
Total Adjustments					0.00						

Notes

- The Applied Receipts column lists the deposit amounts during the day. This column matches the Deposit Ticket, Product, and Daily Production Summary reports.
- The Insurance Charge column lists fee slip charge amounts that were incurred by insurance companies.
- The Patient Charge column lists fee slip charge amounts that were incurred by patients.
- The Applied Insurance Payment column lists insurance check amounts that were applied to fee slips.
- The Applied Patient Payment column lists patient payment amounts that were applied to fee slips.
- The Insur. Adjust. column lists insurance adjustment amounts including product returns.
- The Patient Return & Adjust. column lists patient adjustment amounts including product returns.
- The Patient Refund column lists amounts that were refunded to patients.
- The Total Charges amount matches the Fee Slip Detail report.
- The Total Applied Ins. & Pat. Payments amount matches the Applied Payment report.
- The Total Patient Returns amount matches the Returns And Refunds report's Product Return total.
- The Total Adjustments amount matches the Adjustment Register and Daily Production Summary reports.

Day Sheet Summary

The Day Sheet Summary report lists each patient or insurance transaction made on the selected posting date. Use this report to view money collected, fee slip charges made to patients and insurance, returns, refunds, and adjustments. This report is based on providers on fee slips. OfficeMate suggests creating this report on a daily basis.

- ❖ To create the Day Sheet Summary report, set the date parameters, select the **By Provider** check box if you want to sort the report by providers, and select a provider from the **Provider** drop-down menu. Also, choose the appropriate **Insurance Co / Patient Name** sort order.

05/06/2005 4:08:26PM		Day Sheet Summary (Based on provider on feeslip) Selected Date 05/06/2005									
Provider	Insurance Co / Patient Name	Fee Slip	Receipts	Insurance Charge	Patient Charge	Applied Insurance Payment	Applied Patient Payment	Insur. Adjust.	Patient Return & Adjust.	Patient Refund	Receipt Type
Miller, O.D., Michael	Mitchell, Henry A	89		80.00	20.00						
Report Total			0.00	80.00	20.00	0.00	0.00	0.00	0.00	0.00	
Total Charges					100.00						
Total Applied Ins. & Pat. Payments					0.00						
Total Adjustments & Returns					0.00						
Total Patient Returns					0.00						
Total Patient Adjustments					0.00						
Total Adjustments											

Notes

- The Applied Receipts column lists the deposit amounts during the day. This column matches the Deposit Ticket, Product, and Daily Production Summary reports.
- The Insurance Charge column lists fee slip charge amounts that were incurred by insurance companies.
- The Patient Charge column lists fee slip charge amounts that were incurred by patients.
- The Applied Insurance Payment column lists insurance check amounts that were applied to fee slips.
- The Applied Patient Payment column lists patient payment amounts that were applied to fee slips.
- The Insur. Adjust. column lists insurance adjustment amounts including product returns.
- The Patient Return & Adjust. column lists patient adjustment amounts including product returns.
- The Patient Refund column lists amounts that were refunded to patients.
- The Total Charges amount matches the Fee Slip Detail report.
- The Total Applied Ins. & Pat. Payments amount matches the Applied Payment report.
- The Total Patient Returns amount matches the Returns And Refunds report's Product Return total.
- The Total Adjustments amount matches the Adjustment Register and Daily Production Summary reports.

Deleted Patients

The Deleted Patients report lists all deleted patients. OfficeMate suggests creating this report on demand.

- ❖ To create the Deleted Patients report, set the date parameters.

05/06/2005 4:29:30PM		Deleted Patient Listing					
		Date Deleted >= 04/30/2005					
		Date Deleted <= 05/06/2005					
<u>Patient Name</u>	<u>Address</u>	<u>City</u>	<u>State</u>	<u>ZIP Code</u>	<u>Home Phone</u>	<u>Day Phone</u>	<u>Date Deleted</u>
Carrie, Damschroder	North Street	Helena	OH	43435		(949) 987-1111	05/06/2005
Total Deleted Patients:		1					

Deposit Ticket

The Deposit Ticket report lists all deposits made on a particular day. This report includes payments made by cash, check, or other methods and lists them by patient or insurance company name. OfficeMate suggests creating this report on a daily basis.

- ❖ To create the Deposit Ticket report, set the date parameters.

05/06/2005 5:04:53PM		Deposit Ticket			
		Deposit Date >= 05/06/2004			
		Deposit Date <= 05/06/2005			
<u>Insurance Company or Patient Name</u>		<u>Receipt No</u>	<u>Check No</u>	<u>Bank No</u>	<u>Amount</u>
Checks					
04/05/2005					
Radmore, Michelle		90			40.00
05/02/2005					
Mitchell, Henry A		91			20.00
05/03/2005					
Carter, Sally		89			90.00
05/04/2005					
Mitchell, Henry A		87			613.59
Underwood, Jennifer		88			280.71
		Total Checks			1,044.30
Cash					
05/04/2005					
Carter, Sally		86			20.00
		Total Cash			20.00
		Total Deposit			1,064.30

Notes

- The Total Deposit amount matches the Daily Production and Production reports.
- The Total Credit Card Refunds amount matches the Credit Card Return amount on the Day Sheet report.

Diagnosis Code Listing

The Diagnosis Code Listing report lists all diagnosis codes that are setup in the OfficeMate Customization window. OfficeMate suggests creating this report on demand.

- ❖ To create the Diagnosis Code Listing report, select a diagnosis group from the **Diagnosis Group** drop-down menu and choose the appropriate **Diagnosis Code** and **Diagnosis Description** sort order preferences.

05/09/2005 10:13:30AM			Diagnosis Code Listing		
Code	Description	Group			
052.9	Chickenpox (varicella Virus) Without Complications	General/Symptoms/Contrib. Diseases			
053.20	Lids: Herpes Zoster Dermatitis	Eyelids			
053.21	Keratoconjunctivitis, Herpes Zoster	Cornea			
053.22	Iridocyclitis, From Herpes Zoster	Anterior Chamber			
053.29	Herpes Zoster W/ Ophthalmic Complications, Unspecif	Globe			
054.40	Herpes Simplex W/ Ophthalmic Complications,unspecif	General/Symptoms/Contrib. Diseases			
054.41	Lids: Dermatitis, From Herpes Simplex	Eyelids			
054.42	Keratitis, Dendritic, From Herpes Simplex	Cornea			
054.43	Keratitis, Disciform, From Herpes Simplex	Cornea			
054.44	Iridocyclitis, From Herpes Simplex	Anterior Chamber			
055.71	Keratoconjunctivitis, From Measles	Cornea			
056.9	Rubella, Without Mention Of Complication	General/Symptoms/Contrib. Diseases			
076.0	Trachoma, Initial Stage	Cornea			
076.1	Trachoma, Active Stage	Cornea			
076.9	Trachoma, Unspecified	Cornea			
077.0	Conjunctivitis, Inclusion	Conjunctive & Sclera			
077.1	Keratoconjunctivitis, Epidemic	Cornea			
077.2	Conjunctivitis, Pharyngoconjunctival Fever	Conjunctive & Sclera			
077.3	Conjunctivitis, Adenoviral	Conjunctive & Sclera			
077.4	Conjunctivitis, Epidemic Hemorrhagic	Conjunctive & Sclera			
077.8	Conjunctivitis, Viral, Other	Conjunctive & Sclera			
077.98	Conjunctivitis, Chlamydial, Unspecified	Conjunctive & Sclera			
077.99	Conjunctivitis, Viral, Unspecified	Conjunctive & Sclera			
078.0	Molluscum Contagiosum	Eyelids			
078.1	Viral Warts	Eyelids			
090.3	Keratitis, Syphilitic Interstitial	Cornea			
091.0	Syphilis, Primary	General/Symptoms/Contrib. Diseases			
091.3	Syphilis, Secondary	General/Symptoms/Contrib. Diseases			
091.50	Uveitis, Syphilitic, Unspecified	Globe			
091.51	Chorioretinitis, Syphilitic, Secondary	Retina			
091.52	Iridocyclitis, Syphilitic, Secondary	Anterior Chamber			
094.83	Retinochoroiditis, Disseminated, Syphilitic	Retina			
094.84	Optic Nerve Atrophy, From Neurosyphilis	Optic Nerve			

Discount Register

The Discount Register report lists fee slip numbers, patient names, transaction dates, fee totals, discount amounts, who recorded the transactions, and the type of discount that was recorded. OfficeMate suggests creating this report on a weekly basis.

- ❖ To create the Discount Register report, set the date parameters and select a sort order type from the **Type** drop-down menu.

05/09/2005 10:37:08AM			Discount Register			
			Date >= 05/03/2004			
			Date <= 05/09/2005			
			Type = By Type			
Fee Slip	Patient	Date	Fee	Discount	Recorded By	
Employee Discount						
90	Radmore, Michelle	05/09/2005	100.00	(1.00)	Franklin, Helen	
Total for: Employee Discount				(1.00)		
Total Discounts				(1.00)		

Note

The Total Discounts amount matches the Daily Production Summary and Fee Slip Detail reports.

Fee Slip

The Fee Slip report reprints a previously recorded fee slip. OfficeMate suggests creating this report on demand.

- ❖ To create the Fee Slip report, click in the **Patient Name** text box and search for and select a patient, set the fee slip date parameters, or type a fee slip number in the **Fee Slip Number** text box. After you click **Preview**, the Fee Slip Comments Text window opens. Type appropriate descriptions in the text boxes and click **Save** or **OK**.

OfficeMate Software Solutions 15375 Barranca Pkwy, Bldg L Irvine, CA 92618		Statement of Charges and Payments					
To: Sally Carter 9896 Calle Dulce San Juan Capistrano, CA 92675		Fee Slip Number: 87 Date Printed: 05/09/2005 Provider: Michael Miller, O.D. Office Phone: 800-269-3666 License: 4646-89 Tax ID: 66-456872 TPA Number: 345-454-234					
		Patient: Sally Carter Next Appt:					
Service	Date	Qty	Description	CPT	Diagnosis	Amount	Patient Balance
	05/05/2005	1	Temporary Absorbable Plugs	A4262	053.22	0.00	
Balance Due							0.00
Other Open Items							(130.00)
CREDIT Do Not Pay							<u>(130.00)</u>

Fee Slip Audit

The Fee Slip Audit report lists in detail all fee slips recorded during a specific period. OfficeMate suggests creating this report on a weekly basis.

- ❖ To create the Fee Slip Audit report, set the fee slip date parameters, select the **By Provider** check box if you want to sort the report by providers, and select a provider from the **Provider** drop-down menu.

05/09/2005 11:56:10AM		<div>Fee Slip Audit</div> <div>Fee Slip Date >= 05/03/2005</div> <div>Fee Slip Date <= 05/09/2005</div>										
Service	Slip	Patient	Product Name	Description	Qty	Insurance Co.	Coverage %	Ins Chg	Pat Chg	Pat Pmt	Pat Adj	Pat Bal
05/05/2005	87	Carter, Sally	A4262	Temporary Absorbable Plugs	1	Eye Care Plan Of America - Region	100	0.00	0.00	0.00	0.00	0.00
05/03/2005	88	Carter, Sally	VOIDED 05/05/2005									
								0.00	0.00	0.00	0.00	0.00
05/06/2005	89	Mitchell, Henry	A4262	Temporary Absorbable Plugs	1	Medicare	80	80.00	20.00	(20.00)	0.00	0.00
					1			80.00	20.00	(20.00)	0.00	0.00
05/09/2005	90	Radmore, Michelle	A4262	Temporary Absorbable Plugs	1	Medical Eye Services	100	90.00	9.00	(9.00)	0.00	0.00
					1			90.00	9.00	(9.00)	0.00	0.00
Grand Total					3			170.00	29.00	(29.00)	0.00	0.00

Fee Slip Detail

The Fee Slip Detail report lists fee slips, patients, products, posting dates, fees, discounts, sales tax, totals, and recorded by names. OfficeMate suggests creating this report on a weekly basis.

- ❖ To create the Fee Slip Detail report, set the posting date parameters and select a sort order type from the **Type** drop-down menu.

05/09/2005 12:21:45PM		Fee Slip Detail Report						
		By Posting Date						
		Posting Date >= 05/03/2005						
		Posting Date <= 05/09/2005						
Fee Slip	Patient	Product	Posting Date	Gross Fees Invoiced	Discount	Sales Tax	Total Charges	Recorded By
21	Radmore, Michelle	99213	05/05/2005	69.00			69.00	Miller, O.D., Michael
87	Carter, Sally	A4262	05/05/2005	0.00			0.00	Franklin, Helen
Total Fee Slips				69.00	0.00	0.00	69.00	
Adjustments				0.00				
Returns				0.00				
Net Fees Invoiced				69.00				
89	Mitchell, Henry A	A4262	05/06/2005	100.00			100.00	Franklin, Helen
Total Fee Slips				100.00	0.00	0.00	100.00	
Adjustments				0.00				
Returns				0.00				
Net Fees Invoiced				100.00				
90	Radmore, Michelle	A4262	05/09/2005	100.00	(1.00)		99.00	Franklin, Helen
Total Fee Slips				100.00	(1.00)	0.00	99.00	
Adjustments				0.00				
Returns				0.00				
Net Fees Invoiced				99.00				
Report Total				269.00	(1.00)	0.00	268.00	

Notes

- The Gross Fees Invoiced column matches the Production and Daily Production Summary reports. This column does *not* include discounts or sales tax.
- The Discount column matches the Discount Register report and the discount amount on the Daily Production Summary report.
- The Sales Tax column matches the sales tax amount on the Daily Production Summary and Production reports.
- The Total Charges column matches the total charges amount on the Day Sheet report.

Fee Slips on Hold

The Fee Slips on Hold report lists fee slips that were placed on hold. Print this report to review the fee slip status and check whether or not the fee slips on hold should be on hold. OfficeMate suggests creating this report on a weekly basis.

- ❖ To create the Fee Slips on Hold report, select the **By Provider** check box if you want to sort the report by providers and then select a provider from the **Provider** drop-down menu.

05/09/2005 1:59:53PM		Fee Slips On Hold									
Service	Slip Patient	Product Name	Description	Qty	Insurance Co.	Coverage %	Ins Chg	Pat Chg	Pat Pmt	Pat Adj	Pat Bal
05/09/2005	91 Carter, Sally	A4262	Temporary Absorbable Plugs	1	Eye Care Plan Of America - Region	100	150.00	50.00			50.00
				1			150.00	50.00	0.00	0.00	50.00
Grand Total				1			150.00	50.00	0.00	0.00	50.00

Frame Aging

The Frame Aging report lists the dates frames were received and sold, the quantity on hand, and the number of days since the last sale. OfficeMate suggests creating this report on demand.

Note

You will only be able to create the Frame Aging report if you are maintaining inventory in OfficeMate.

- ❖ To create the Frame Aging report, choose the appropriate **Product Name** and **Last Received Date** sort order preferences.

05/09/2005 2:51:22PM		Frames Aging Report									
Product Name / Product Code	PO Number	Last Date Received	Last Date Sold	Days Since Last Sold	Qty On Hand	PTD			YTD		
						Qty Sold	Qty Return	Amount Sold	COGS Sold	Gross Profit	Qty Sold
101 COACH ASTOR / 679516	3	05/09/2005		NO SALES	0	0	0	\$0.00	\$0.00	\$0.00	0
											0
											\$0.00
											\$0.00
											\$0.00

Frame Listing

The Frame Listing report lists all frame manufacturers and vendors and their inventory. This report includes manufacturers, designers, frame names, colors, sizes with temple lengths, genders, materials, fee costs, gross profit percentages, and product numbers. OfficeMate suggests creating this report on demand.

- ❖ To create the Frame Listing report, select a manufacturer from the **Manufacturer** drop-down menu, select the **Inactive only** check box if you only want to display inactive frames, and select the **Discontinued only** check box if you only want to display discontinued frames.

05/19/2006 11:02:45AM		Frame Listing								
Manufacturer: Marchon Eyewear, Inc.										
Designer:										
Name	Color	Size	Gender	Material	Fee	Cost	GP %	Product Code	Active	Discontinued
Frames										
OK C14 SUN	GOLD W/ROSE/TANG	46	0	140 Unisex	322.99	125.00	61.3	750778418650	True	False
OK C14 SUN	PLATINUM W/LAVEN	46	0	140 Unisex	322.99	125.00	61.3	750778418704	True	False
OK C5 SUN	GOLD	44	0	140 Unisex	322.99	125.00	61.3	750778186306	True	False
OK C5 SUN	GOLD	46	0	145 Unisex	322.99	125.00	61.3	750778186320	True	False
OK C5 SUN	PLATINUM	44	0	140 Unisex	322.99	125.00	61.3	750778186405	True	False
OK C5 SUN	PLATINUM	46	0	145 Unisex	322.99	125.00	61.3	750778186429	True	False
OK C55 CC	GOLD	44	0	165 Unisex	334.99	130.00	61.2	750778186504	True	False
OK C55 CC	GOLD	46	0	165 Unisex	334.99	130.00	61.2	750778186528	True	False
OK C55 CC	PLATINUM	44	0	165 Unisex	334.99	130.00	61.2	750778186573	True	False
OK C55 CC	PLATINUM	46	0	165 Unisex	334.99	130.00	61.2	750778186597	True	False
OK G6 SUN	GOLD	42	0	140 Unisex	322.99	125.00	61.3	750778192772	True	False
OK G6 SUN	GOLD	44	0	145 Unisex	322.99	125.00	61.3	750778192796	True	False
OK G6 SUN	PLATINUM	42	0	140 Unisex	322.99	125.00	61.3	750778192840	True	False
OK G6 SUN	PLATINUM	44	0	145 Unisex	322.99	125.00	61.3	750778192864	True	False
OK G65 CC	GOLD	42	0	165 Unisex	334.99	130.00	61.2	750778193663	True	False
OK G65 CC	GOLD	44	0	165 Unisex	334.99	130.00	61.2	750778193687	True	False
OK G65 CC	PLATINUM	42	0	165 Unisex	334.99	130.00	61.2	750778193731	True	False
OK G65 CC	PLATINUM	44	0	165 Unisex	334.99	130.00	61.2	750778193755	True	False
OK1565	DARK SILVER	50	0	140 Unisex	216.99	79.00	63.6	750778227245	True	False
OK1565	SATIN BLACK	50	0	140 Unisex	216.99	79.00	63.6	750778227382	True	False
OK1715	GUNMETAL/GREY	47	0	140 Unisex	251.99	94.00	62.7	750778544497	True	False
OK1715	SATIN BLACK/GREY	47	0	140 Unisex	251.99	94.00	62.7	750778534473	True	False
OK1725	SATIN BLACK	46	0	135 Women's	251.99	94.00	62.7	750778561264	True	False
OK1745	CHOCOLATE	59	0	135	230.99	85.00	63.2	750778421865	True	False
OK1745	DARK SILVER	59	0	135	230.99	85.00	63.2	750778421810	True	False
OK1745	SATIN BLACK	59	0	135	230.99	85.00	63.2	750778421919	True	False
OK1755	DARK OLIVE	63	0	125 Women's	216.99	79.00	63.6	750778422084	True	False
OK1755	SATIN AUBERGINE	63	0	125 Women's	216.99	79.00	63.6	750778421988	True	False
OK1755	SATIN BLACK	63	0	125 Women's	216.99	79.00	63.6	750778422138	True	False
OK1755	SLATE/MAUVE	63	0	125 Women's	216.99	79.00	63.6	750778422039	True	False
OK1765	ANTHRACITE	59	0	135 Unisex	216.99	79.00	63.6	750778425344	True	False
OK1765	COFFEE W/ROSE	59	0	135 Unisex	216.99	79.00	63.6	750778425443	True	False
OK1765	COFFEE W/TAN	59	0	135 Unisex	216.99	79.00	63.6	750778425290	True	False
OK1765	DARK SILVER	59	0	135 Unisex	216.99	79.00	63.6	750778425498	True	False
OK1765	INDIGO	59	0	135 Unisex	216.99	79.00	63.6	750778425399	True	False

Frame Sales Detail by Manufacturer

The Frame Sales Detail by Manufacturer report lists the dates all frames were sold and sorts the frames by manufacturer. This report includes frame details, unusual fees, actual fees, actual fees changed, gross profit percentages, and month-to-date and year-to-date quantities sold. OfficeMate suggests creating this report on demand.

- ❖ To create the Frame Sales Detail by Manufacturer report, set the date parameters.

05/09/2005 3:04:58PM		Frame Sales Detail by Manufacturer									
		Date of Sale >= 05/09/2004									
		Date of Sale <= 05/09/2005									
Manufacturer: Marchon Eyewear, Inc.											
Designer: Coach											
Name	Color	Size		Retail	Actual	Cost	Profit	GP%	PTD	YTD	
101 Coach Astor	BLACK	52	140	178.99	178.99	59.95	119.04	66.51	1	1	
101 Coach Astor	GUNMETAL	52	140	178.99	178.99	59.95	119.04	66.51	1	1	
101 Coach Astor	COFFEE	52	140	357.98	357.98	119.90	238.08	66.51	2	2	
101 Coach Astor	ANTIQUE BLUE	52	140	178.99	178.99	59.95	119.04	66.51	1	1	
102 Coach Claire	LILAC	49	135	190.99	190.99	64.95	126.04	65.99	1	1	
Designer: Marchon® Collection											
Name	Color	Size		Retail	Actual	Cost	Profit	GP%	PTD	YTD	
Wlock 760/1	GUNMETAL	53	140	214.99	214.99	89.95	125.04	58.16	1	1	
				1,300.93	1,300.93	454.65	846.28		7	7	

Frame Sales Summary

The Frame Sales Summary lists the number of frames sold. OfficeMate suggests creating this report on demand.

- ❖ To create the Frame Sales Summary report, set the date parameters and select a sort order type from the **Type** drop-down menu.

05/09/2005 3:15:24PM		Frame Sales Summary by Age			
		Date of Sale >= 05/05/2003			
		Date of Sale <= 05/05/2005			
Manufacturer	Designer	Age	Units	%	
Marchon Eyewear, Inc.	Coach	41 - 55	6	600.00	
Totals			6	600.00	

Graph - Patients by Age

The Patients by Age graph compares the number of patients this year to the number of patients last year and is grouped by age categories.

Graph - Patients by City

The Patients by City graph compares the number of patients this year to the number of patients last year and is grouped by city.

Graph - Patients by Gender

The Patients by Gender graph compares the number of patients this year to the number of patients last year and is grouped by gender.

Graph - Patients by Insurance Type

The Patients by Insurance Type graph compares the number of patients this year to the number of patients last year and is grouped by insurance types.

Graph - Patients by Source

The Patients by Source graph compares the number of patients this year to the number of patients last year and is grouped by source of entry to your office.

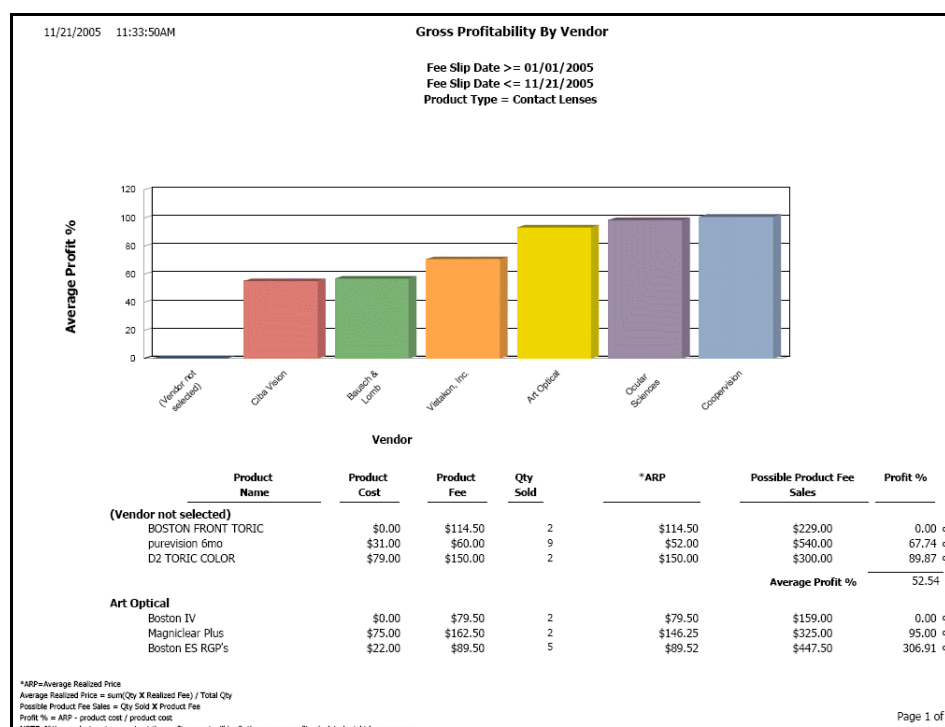
Graph - Patients by ZIP Code

The Patients by ZIP Code graph compares the number of patients this year to the number of patients last year and is grouped by ZIP codes.

Gross Profitability by Vendor

The Gross Profitability by Vendor report displays the gross profitability by vendor.

- ❖ To create the Gross Profitability by Vendor report, set the fee slip date parameters, select a product type from the **Product Type** drop-down menu, and select a vendor from the **Vendor** drop-down menu.



Inactive Frames List

The Inactive Frames List report lists all frames that are marked as inactive. OfficeMate suggests creating this report on demand.

05/09/2005 4:24:58PM		Inactive/Discontinued Frame Listing						
Manufacturer: Marchon Eyewear, Inc.								
Designer: Coach								
Product Name	Product Code	Color	Eye DBL	TMPL	Gender	Material	Fee	Cost
Inactive Frames								
102 COACH CLAIRE	679516777890	BLACK	49	135	Women's		190.99	64.95
102 COACH CLAIRE	679516777913	BLACK	51	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778415	BORDEAUX	49	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778499	BORDEAUX	51	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778286	LILAC	49	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778309	LILAC	51	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778156	SAND	49	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778170	SAND	51	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778026	TAN	49	135	Women's		190.99	64.95
102 COACH CLAIRE	679516778040	TAN	51	135	Women's		190.99	64.95
106 COACH KATLEY	679516771331	BORDEAUX	51	135	Women's		190.99	64.95
106 COACH KATLEY	679516771355	BORDEAUX	53	135	Women's		190.99	64.95
106 COACH KATLEY	679516771201	LILAC	51	135	Women's		190.99	64.95
106 COACH KATLEY	679516771225	LILAC	53	135	Women's		190.99	64.95
106 COACH KATLEY	679516771072	SAND	51	135	Women's		190.99	64.95
106 COACH KATLEY	679516771096	SAND	53	135	Women's		190.99	64.95
106 COACH KATLEY	679516770945	TAN	51	135	Women's		190.99	64.95
106 COACH KATLEY	679516770969	TAN	53	135	Women's		190.99	64.95

Insurance Aging by Patient Detail

The Insurance Aging by Patient Detail report lists patient insurance balances. This report is organized by insurance company or patient name. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Insurance Aging by Patient Detail report, set the period end date parameter, select an insurance carrier from the **Insurance Co.** drop-down menu, and select the **Provider** check box if you want to sort the report by providers.

05/09/2005 4:31:57PM		Insurance Aging by Patient Detail											
		Period end <= 05/09/2005											
		Insurance Co. = Eye Care Plan Of America - Region 1											
Patient	Guarantor	Insured ID	Fee Slip	Posted	Total	Current	31-60	61-90	91-120	> 120	UnApp	Last Pmt	
Eye Care Plan Of America - Region 1 - 800-426-5481													
Carter, Sally	Carter, Sally	86	04/27/2005		135.00	135.00							
Carter, Sally	Carter, Sally	92	05/09/2005		107.49	107.49							
Michall, Henry A	Michall, Henry A	2	03/10/2000		(4.40)					(4.40)		08/21/2002	
Radmore, Michale	Radmore, Michelle	42	03/09/2000		(5.00)					(5.00)		08/21/2002	
Ressler, Margaret	Ressler, Margaret	19	06/02/1999		(2.00)					(2.00)		08/21/2002	
Underwood, Jennifer	Underwood, James	10	05/19/1999		(100.00)					(100.00)		08/21/2002	
Insurance Company Total					131.09	242.49	0.00	0.00	0.00	(111.40)			
Report Total					131.09	242.49	0.00	0.00	0.00	(111.40)			
A/R Total w/Unapplied													

Insurance Aging by Patient Summary

The Insurance Aging by Patient Summary report lists patient insurance balances. This report is organized by insurance company or patient name. This report includes patients, guarantors, insured ID numbers, and the total amounts outstanding. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Insurance Aging by Patient Summary report, set the period end date parameter, select an insurance carrier from the **Insurance Co.** drop-down menu, and select the **Provider** check box if you want to sort the report by providers. Choose the appropriate **Insurance Co.** and **Patient Name** sort order preferences.

05/09/2005 5:23:50PM		Insurance Aging by Patient Summary											
		Period end <= 05/09/2005											
Patient	Guarantor	Day Phone	Insured ID	SSN	Total	Current	31-60	61-90	91-120	> 120	UnApp	Last Pmt	
Eye Care Plan Of America - Region 1 - 800-426-5481													
Carter, Sally	Carter, Sally				242.49	242.49							
Insurance Company Total:					242.49	242.49	0.00	0.00	0.00	0.00			
Percent of Total						100.00	0.00	0.00	0.00	0.00			
Medical Eye Services - 818 456 8503													
Davis, Steven	Davis, Steven		343 34 3579	343 34 3579	65.00					65.00		08/21/2002	
Radmore, Michelle	Radmore, Michelle		080943		150.00	90.00				60.00		08/21/2002	
Ressler, Margaret	Ressler, Margaret		343 33 0987	343 33 0987	67.00					67.00		08/21/2002	
Underwood, Jennifer	Underwood, James		468 55 7892		230.00					230.00		08/21/2002	
Underwood, Tracy	Underwood, James		468 55 7892		65.00					65.00		03/09/2000	
Insurance Company Total:					577.00	90.00	0.00	0.00	0.00	487.00			
Percent of Total						16.00	0.00	0.00	0.00	84.00			
Medicare - 310 555 6486													
Cole, Harper	Cole, Harper	(949) 433-7896		234 34 5797	48.00		48.00						
Michall, Henry A	Michall, Henry A		2432434	222-22-2222	134.40	80.00				54.40		08/21/2002	
Insurance Company Total:					182.40	80.00	48.00	0.00	0.00	54.40			
Percent of Total						44.00	26.00	0.00	0.00	30.00			
Vision Service Plan - 800 852-7600													
Cole, Harper	Cole, Harper	(949) 433-7896		234 34 5797	384.00		384.00						
Insurance Company Total:					384.00	0.00	384.00	0.00	0.00	0.00			
Percent of Total						0.00	100.00	0.00	0.00	0.00			
Report Total					1,395.89	412.49	432.00	0.00	0.00	541.40			
Percent of Total						30.00	31.00	0.00	0.00	39.00			
A/R Total w/Unapplied													

Insurance Aging Summary

The Insurance Aging Summary report summarizes the outstanding amount for each insurance company. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Insurance Aging Summary report, set the period end date parameter and select a provider from the **Provider** drop-down menu.

05/09/2005 5:32:05PM		Insurance Aging Summary							
		Period end <= 05/09/2005							
Insurance Company		Total	Current	31-60	61-90	91-120	Over 120	Unapplied	Last Pmt
Eye Care Plan Of America - Region 1		242.49	242.49						
	Percent of Total		100.00						
Medical Eye Services		577.00	90.00				487.00		08/21/2002
	Percent of Total		15.60				84.40		
Medicare		182.40	80.00	48.00			54.40		08/21/2002
	Percent of Total		43.86	26.32			29.82		
Vision Service Plan		384.00		384.00					
	Percent of Total			100.00					
	Report Total	1,385.89	412.49	432.00			541.40		
	Percent of Total		29.76	31.17			39.07		
A/R Total w/Unapplied									

Insurance Charge Back

The Insurance Charge Back report lists all the insurance charge backs in a given date range. This report groups the charge backs by insurance name. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Insurance Charge Back report, set the posting date parameters.

05/09/2005 5:48:01PM		Insurance Charge Back		
		Posting Date >= 04/09/2004		
		Posting Date <= 05/09/2005		
Patient Name	Feeslip No	Posting Date	Charge Back Fee	
Vision Service Plan				
Cole, Harper	94	05/09/2005	30.00	
Cole, Harper	94	05/09/2005	50.00	
Total Charge back for Vision Service Plan			<u>80.00</u>	
Report Total			<u>80.00</u>	

Insurance Analysis

The Insurance Analysis report lists dates, insurance carrier names, product names, CPT codes, amounts billed to insurance, amounts paid by insurance, and insurance write-offs. OfficeMate suggests creating this report on demand.

- ❖ To create the Insurance Analysis report, set the fee slip date parameters, select an insurance carrier from the **Insurance Co.** drop-down menu, and choose to group the report by insurance carrier or CPT code using the **Group by** drop-down menu.

05/10/2005 8:51:10AM		Insurance Analysis Report										
		Fee Slip Date >= 01/01/2004										
		Fee Slip Date <= 05/05/2005										
Service Date	Slip	Patient	Product Name	CPT Code	Qty	Product Fee	Coverage %	Ins Chg	Pat Chg	Ins Pmt	Ins Write Off / Adj	Ins Bal
Eye Care Plan Of America - F												
04/27/2005	86	Carter, Sally	99211	99211	1	25.00	100	25.00		(55.00)		(30.00)
	86		92012	92012	1	65.00	100	65.00			(20.00)	45.00
	86		92012	92012	1	65.00	100	65.00				65.00
					3	155.00		155.00	0.00	(55.00)	(20.00)	80.00
			Grand Total for Eye Care Plan Of America - F		3	155.00		155.00	0.00	(55.00)	(20.00)	80.00
Medicare												
03/16/2005	85	Cole, Harper	Acuvue	V2520	1	30.00	80	24.00	6.00			24.00
	85		Acuvue	V2520	1	30.00	80	24.00	6.00	(24.00)		
					2	60.00		48.00	12.00		(24.00)	0.00
			Grand Total for Medicare		2	60.00		48.00	12.00		(24.00)	24.00
Vision Service Plan												
03/11/2005	80	Cole, Harper	99214	99214	1	105.00	100	105.00				105.00
					1	105.00		105.00	0.00	0.00	0.00	105.00
03/11/2005	81	Cole, Harper	99213	99213	1	69.00	100	69.00				69.00
					1	69.00		69.00	0.00	0.00	0.00	69.00
03/14/2005	83	Cole, Harper	99214	99214	1	105.00	100	105.00				105.00
					1	105.00		105.00	0.00	0.00	0.00	105.00
03/16/2005	84	Cole, Harper	99214	99214	1	105.00	100	105.00				105.00
					1	105.00		105.00	0.00	0.00	0.00	105.00
			Grand Total for Vision Service Plan		4	384.00		384.00	0.00	0.00	0.00	384.00
			Grand Total		9	599.00		587.00	12.00	(79.00)	(20.00)	488.00

Insurance Audit

The Insurance Audit report lists insurance payments, transfers, adjustments, write-offs, and the patients to whom the transactions were applied. OfficeMate suggests creating this report on demand.

- ❖ To create the Insurance Audit report, set the posting date parameters and select an insurance carrier from the **Insurance Co.** drop-down menu.

05/10/2005 9:05:44AM		Insurance Audit List					
		Insurance Co. = Eye Care Plan Of America - Region 1					
		Posting Date >= 01/01/2004					
		Posting Date <= 05/05/2005					
<u>Date</u>	<u>Patient</u>	<u>Fee Slip</u>	<u>CPT</u>	<u>Product</u>	<u>Type</u>	<u>Ref #</u>	<u>Amount</u>
05/04/2005	Carter, Sally	86	92012	92012	Insurance Write-Off		(20.00)
Total Activity							(20.00)

Insurance Listing

The Insurance Listing report lists all insurance companies. This report includes names, addresses, contacts, phone numbers, and fax numbers. OfficeMate suggests creating this report on demand.

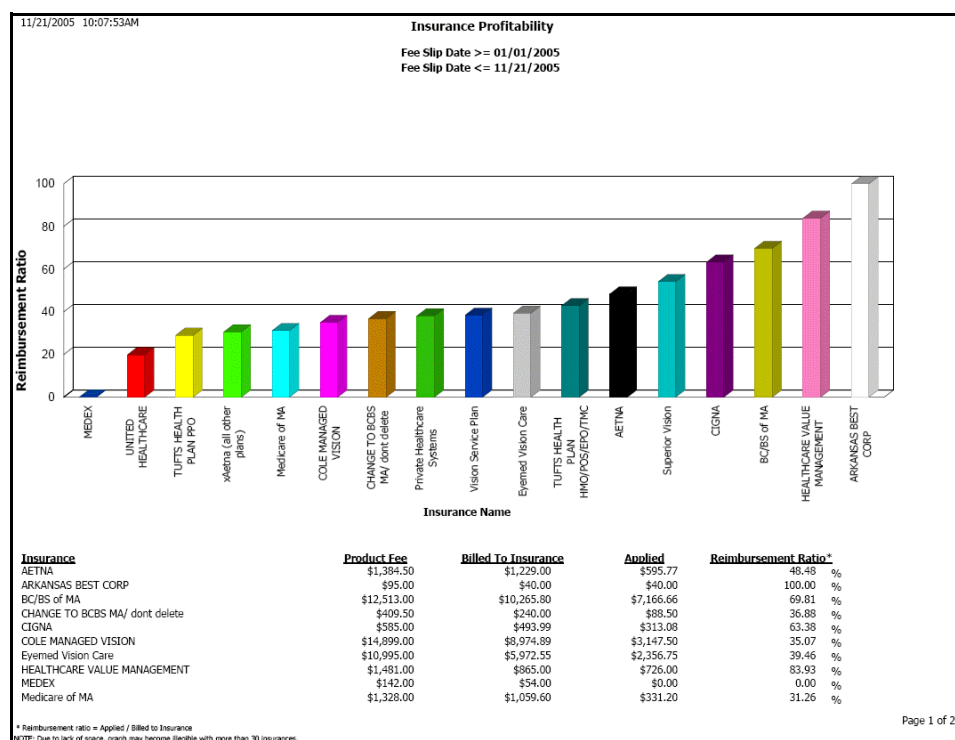
- ❖ To create the Insurance Listing report, select an insurance carrier from the **Insurance Co.** drop-down menu and choose an appropriate **Insurance** sort order.

05/10/2005 10:11:26AM		Insurance Company Listing	
Eye Care Plan Of America - Region 1 7776 S. Pointe Parkway West Suite 150 Phoenix, Arizona 85044		Contact Phone 800-426-5481 Fax	
Medical Eye Services 234 Highway 12 Arcadia, California 92567		Contact Phone 818 456 8503 Fax	
Medicare 2343 Wilshire Blvd. Los Angeles, California 98565		Contact Joann Wilson Phone 310 555 6486 Fax 310 555 6487	
Vision Service Plan 3333 Quality Drive Rancho Cordova, California 95670-7985		Contact Phone 800 852-7600 Fax 916 851-4855	

Insurance Profitability

The Insurance Profitability report displays the percent of the amount received from an insurance company versus the usual and customary product fee.

- ❖ To create the Insurance Profitability report, set the fee slip date parameters and choose appropriate insurance company and profit percentage sort order options from the Sort Order box.



Insurance Revenue

The Insurance Revenue report lists the amounts billed to insurance companies and patients. OfficeMate suggests creating this report on demand.

- ❖ To create the Insurance Revenue report, set the posting date parameters.

05/10/2005 10:46:50AM		Insurance Revenue Report	
		Posting Date >= 01/01/2004	
		Posting Date <= 05/05/2005	
Revenue Source		Billed	% of Total
Insurance Company			
Eye Care Plan Of America - Region 1		135.00	23.81
Medicare		48.00	8.47
Vision Service Plan		384.00	67.72
Total Insurance Payments		567.00	
Patient Payments			
Patient Payment		6,128.83	100.00
Total Patient Payments		6,128.83	
Report Total		6,695.83	
Percentage Billed To Insurance		8.47 %	
Percentage Billed To Patient		91.53 %	

Internal Marketing

The Internal Marketing report lists names selected for marketing letters, labels, and postcards. OfficeMate suggests creating this report on demand.

- ❖ To create the Internal Marketing report, select appropriate criteria from the Selection Criteria and Sort Order box and choose appropriate patient sort order options from the Sort Order box.

Note

Click **Expand** to expand the Selection Criteria and Sort Order box.

05/12/2005

Correspondence Report

Birth Month = January

Birthdate >= 01/01/1950

Birthdate <= 12/31/1970

Recall Date >= 01/01/1947

Recall Date <= 09/13/2004

<u>Pat #</u>	<u>Last Name</u>	<u>First Name</u>	<u>Address</u>	<u>City</u>	<u>State</u>	<u>Zip</u>	<u>Day Phone</u>	<u>Home Phone</u>	<u>email</u>
4	Viega	Valerie	16 Sandpiper	Irvine	CA	92718		(949) 525-4733	

Inventory Adjustments

The Inventory Adjustments report lists the adjustments that were made to inventory through the Inventory Adjustment window. OfficeMate suggests creating this report on demand.

- ❖ To create the Inventory Adjustments report, select a transaction type from the **Transaction Type** drop-down menu, set the transaction date parameters, and select a transaction reason from the **Transaction Reason** drop-down menu.

Inventory Adjustment Report - By Type										
05/30/2006 11:48:55AM		Transaction Date >= 05/01/2006 Transaction Date <= 05/30/2006								
Transaction Type: Sale										
Created By: Helen Franklin										
Product	Product Code	Comment	Size	Color	Date	Quantity	Cost	Reason	Extended	
101 COACH ASTOR	679516719173	Transaction from Fee Slip	52,0,140,52,29,5,54,5	COFFEE	5/11/2006	1	59.95	New fee slip line item	59.95	
Acuvue	789789	Transaction from Fee Slip	543,00,6,00,6,00,6,00,6,6	Brown Aqua #1	5/11/2006	1	50.00	New fee slip line item	50.00	
Acuvue	789789	Transaction from Fee Slip	543,00,6,00,6,00,6,00,6,6	Brown Aqua #1	5/11/2006	1	50.00	New fee slip line item	50.00	
Acuvue	789789	Transaction from Fee Slip	543,00,6,00,6,00,6,00,6,6	Brown Aqua #1	5/16/2006	1	50.00	New fee slip line item	50.00	
Acuvue	733905100031	Transaction from Fee Slip	8,80,14,00,-0,50,0,25,0,1	tawt Aqua #1	5/16/2006	1	50.00	New fee slip line item	50.00	
Acuvue	733905100031	Transaction from Fee Slip	8,80,14,00,-0,50,0,25,0,1	tawt Aqua #1	5/17/2006	1	50.00	New fee slip line item	50.00	
CINDERELLA	679516757625	Transaction from Fee Slip	40,0,115,39,26,39,5	PINK	5/25/2006	1	44.95	New fee slip line item	44.95	
									354.90	
Report Total									354.90	

Inventory Profitability

The Inventory Profitability report displays inventory profitability by manufacturer. OfficeMate suggests creating this report on a yearly basis.

- ❖ To create the Inventory Profitability report, set the date parameters and select a provider from the **Provider** drop-down menu.

05/10/2005 2:09:56PM

Inventory Profitability Report

Selected Date 05/10/2005

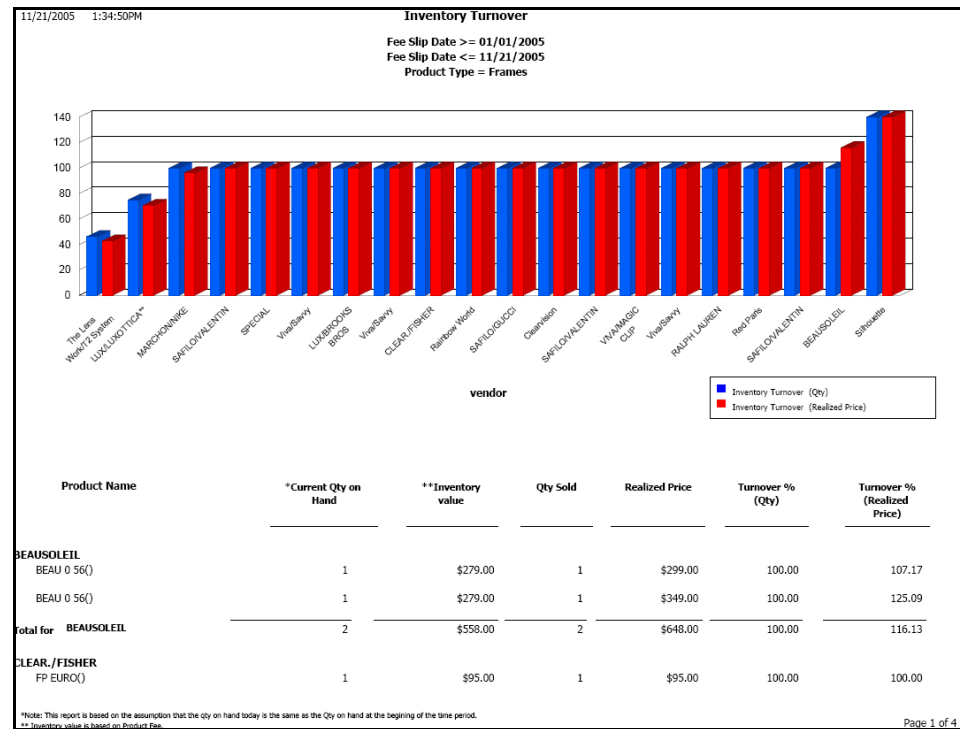
Provider = Michael Miller, O.D.

Type/Manufacturer Name	Today's Totals					Month-To-Date Totals					Year-To-Date Totals							
	Prod Fee	Patt Fee	Cost	Profit	%	Qty	Prod Fee	Patt Fee	Cost	Profit	%	Qty	Prod Fee	Patt Fee	Cost	Profit	%	Qty
Contact Lenses																		
Specialty CLs													280	280	90	190	68	2
8 ROK POP																		
Total Specialty CLs	0	0	0	0	0	0	0	0	0	0	0	0	280	280	90	190	68	2
Vistakon, Inc.													60	60	32	28	47	2
ACUVUE													180	180	96	84	47	6
8 ROK POP																		
Total Vistakon, Inc.	0	0	0	0	0	0	0	0	0	0	0	0	240	240	128	112	47	8
Total Contact Lenses	0	0	0	0	0	0	0	0	0	0	0	0	520	520	218	302	47	10
Frames																		
Marchon Eyewear, Inc.							215	215	90	125	58	1	215	215	90	125	58	1
WFOCK 750/1							179	179	60	119	67	1	1,074	1,074	360	714	67	6
101 COACH ASTOR													191	191	65	126	66	1
102 COACH CLAIRE																		
Total Marchon Eyewear, Inc.	0	0	0	0	0	0	394	394	150	244	62	2	1,480	1,480	515	965	65	8
Total Frames	0	0	0	0	0	0	394	394	150	244	62	2	1,480	1,480	515	965	65	8
Ophthalmic Lenses																		
(no vendor)							250	250		250	100	2	1,750	1,750		1,750	100	14
8 FFT25-28																		
Total (no vendor)	0	0	0	0	0	0	250	250	0	250	100	2	1,750	1,750	0	1,750	100	14
Total Ophthalmic Lenses	0	0	0	0	0	0	250	250	0	250	100	2	1,750	1,750	0	1,750	100	14
Other																		
(no vendor)							138	110	22	88	80	2	552	524	88	436	83	8
A/R																		
Total (no vendor)	0	0	0	0	0	0	138	110	22	88	80	2	552	524	88	436	83	8
Total Other	0	0	0	0	0	0	138	110	22	88	80	2	552	524	88	436	83	8

Inventory Turnover

The Inventory Turnover report displays the inventory turnover for each vendor within the given date range.

- ❖ To create the Inventory Turnover report, set the fee slip date parameters, select the product type from the **Product Type** drop-down menu, and select the **Details** check box to display products by vendor.



Lab Orders

The Lab Orders report prints lab orders.

- ❖ To create the Lab Order report, set the order date parameters, click in the **Patient Name** text box to search for and select a patient, type an order number in the **Order Number** text box, and select an order type from the **Type** drop-down menu.

Eyewear Order																																																											
From: OfficeMate Software Solutions 15375 Barranca Pkwy, Bldg L Irvine CA 92618										Order #: 28 Tray Number: Entry Date: 07/30/2003 Patient: Justin R. Crawford D.D.S. Office Phone: 800-269-3666 Office FAX: 949-727-7479 Print Date: 05/10/2005																																																	
To: Essilor Of America, Inc. 2400 118th Ave. N. St. Petersburg, FL 33716										Account #: Vendor Phone: 800-TheEyes Vendor FAX:																																																	
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>DPD</th> <th>NPD</th> <th>Sph</th> <th>Cyl</th> <th>Axis</th> <th>Add</th> <th>Seg Ht</th> <th>BC</th> <th>HPrism</th> <th>BS</th> <th>VPrism</th> <th>BS</th> <th>CT</th> <th>OC</th> </tr> </thead> <tbody> <tr> <td>OD</td> <td>32.00</td> <td>30.00</td> <td>+3.25</td> <td>-2.25</td> <td>180</td> <td>+2.25</td> <td>18.00</td> <td></td> <td>1.00</td> <td>I</td> <td>2.00</td> <td>U</td> <td></td> <td></td> </tr> <tr> <td>OS</td> <td>34.00</td> <td>32.00</td> <td>+2.25</td> <td>-2.00</td> <td>10</td> <td>+0.25</td> <td>18.00</td> <td></td> <td>1.00</td> <td>I</td> <td>2.00</td> <td>U</td> <td></td> <td></td> </tr> </tbody> </table>																DPD	NPD	Sph	Cyl	Axis	Add	Seg Ht	BC	HPrism	BS	VPrism	BS	CT	OC	OD	32.00	30.00	+3.25	-2.25	180	+2.25	18.00		1.00	I	2.00	U			OS	34.00	32.00	+2.25	-2.00	10	+0.25	18.00		1.00	I	2.00	U		
	DPD	NPD	Sph	Cyl	Axis	Add	Seg Ht	BC	HPrism	BS	VPrism	BS	CT	OC																																													
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Lab Orders Outstanding

The Lab Orders Outstanding report lists the status of lab orders including patient names, ages, phone numbers, job dispensers, and the dates the jobs were promised. OfficeMate suggests creating this report on demand.

- ❖ To create the Lab Orders Outstanding report, select the lab order status from the **Lab Order Status** drop-down menu, select a vendor from the **Order From** drop-down menu, set the promised date parameters, and select a lens type from the **Lens Type** drop-down menu.

Note

To create the Lab Orders Outstanding report, you must have a lab selected in the Order Lens From box in the Eyewear Order window and the Supplier box in the Soft Order or Hard Lens Order window. To set up a vendor as a lab, go to [To modify or add vendor names on page 54](#). In addition to specifying the lab, you must also record a promise date in the Promise Date box, select the Fit By and Ordered radio buttons, and select a name and date from the Name and Date drop-down menus in the Rx Order window.

05/10/2005 3:28:36PM		Lab Orders Outstanding Promised Date >= 01/01/2003 Promised Date <= 05/05/2005 Lens Type = Eyewear					
Patient Name	Age	Day Phone	Home Phone	Lab Order #	Dispensed By	Dispensed	Promised
Lab Name: In Office Lab							
Phone:							
Harper Cole	55	(949) 433-7896	(949) 555-7896	39	Tom Duncan	03/10/2005	03/17/2005
Harper Cole	55	(949) 433-7896	(949) 555-7896	40	Tom Duncan	03/11/2005	03/18/2005
Harper Cole	55	(949) 433-7896	(949) 555-7896	42	Tom Duncan	03/14/2005	03/17/2005

Lab Orders Patient Follow-Up

Use the Lab Orders Patient Follow-Up report to contact patients after their frames have been delivered to ensure that their frames fit well. This report lists patient names, phone numbers, dispenser names, and delivery names. OfficeMate suggests creating this report on demand.

- ❖ To create the Lab Orders Patient Follow-Up report, select the lab order status from the **Lab Order Status** drop-down menu, set the delivered date parameters, select the person who delivered the order from the Delivered By drop-down menu, and select a lens type from the **Lens Type** drop-down menu.

Note

To create the Lab Orders Outstanding report, you must have a lab selected in the Order Lens From box in the Eyewear Order window and the Supplier box in the Soft Order or Hard Lens Order window. To set up a vendor as a lab, go to [To modify or add vendor names on page 54](#). In addition to specifying the lab, you must also record a promise date in the Promise Date box, select the Fit By, Ordered, Received, Notified, and Delivered radio buttons, and select a name and date from the Name and Date drop-down menus in the Rx Order window.

05/10/2005 3:45:40PM

Lab Orders Patient Follow-Up

Delivered Date >= 01/01/2001

Delivered Date <= 05/05/2005

Delivered By = Tom Duncan

Lens Type = Eyewear

Patient Name	Age	Home Phone	Day Phone	Dispensed By	Delivered By
Harper Cole	55	(949) 555-7896	(949) 433-7896	Tom Duncan	Duncan, Tom
Henry A. Mitchell	70	(949) 588-6321		Tom Duncan	Duncan, Tom

Lab Orders Patient Notification

Use the Lab Orders Patient Notification report to notify patients to pick up frames that have been received. This report lists patient names, phone numbers, receivers, and dates received. OfficeMate suggests creating this report on demand.

- ❖ To create the Lab Orders Patient Notification report, select the lab order status from the **Lab Order Status** drop-down menu, set the received date parameters, and select a lens type from the **Lens Type** drop-down menu.

Note

To create the Lab Orders Outstanding report, you must have a lab selected in the Order Lens From box in the Eyewear Order window and the Supplier box in the Soft Order or Hard Lens Order window. To set up a vendor as a lab, go to [To modify or add vendor names on page 54](#). In addition to specifying the lab, you must also record a promise date in the Promise Date box, select the Fit By, Ordered, and Received radio buttons, and select a name and date from the Name and Date drop-down menus in the Rx Order window.

05/12/2005 4:04:48PM		Lab Orders Patient Notification			
Received Date >= 01/01/1997					
Received Date <= 12/31/2000					
Lens Type = Eyewear					
Patient Name	Age	Home Phone	Day Phone	Received By	Received
Michelle Radmore	39	(949) 565-8874		Tom Duncan	09/08/1999
DISPOSITION: <input type="checkbox"/> Left Message <input type="checkbox"/> NO Answer <input type="checkbox"/> Confirmed					

Lab Orders Received & Notified

Use the Lab Orders Received & Notified report to review the inventory that you have manufactured and about which you have notified patients, but that is still in your office. Lists the patient names, ages, phone numbers, and notification dates.

OfficeMate suggests creating this report on demand.

- ❖ To create the Lab Orders Received & Notified report, select the lab order status from the **Lab Order Status** drop-down menu, set the delivered date parameters, select the person who received the order from the Received By drop-down menu, and select a lens type from the **Lens Type** drop-down menu.

Note

To create the Lab Orders Outstanding report, you must have a lab selected in the Order Lens From box in the Eyewear Order window and the Supplier box in the Soft Order or Hard Lens Order window. To set up a vendor as a lab, go to [To modify or add vendor names on page 54](#). In addition to specifying the lab, you must also record a promise date in the Promise Date box, select the Fit By, Ordered, Received, and Notified radio buttons, and select a name and date from the Name and Date drop-down menus in the Rx Order window.

05/12/2005 4:21:56PM		Lab Orders Received & Notified			
		Received Date >= 01/01/1995			
		Received Date <= 05/12/2005			
		Lens Type = Eyewear			
PatientName	Age	Home Phone	Day Phone	Notified By	Notified
Henry A. Mitchell	70	(949) 588-6321		Michael Miller, O.D.	05/12/2005

Labels

The Labels report prints labels. OfficeMate suggests printing labels on demand. Print labels using Avery 5260 compatible white rectangular labels. You can purchase these labels from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com.

- ❖ To create labels, select a city from the **City** drop-down menu, select a state from the **State** drop-down menu, select the **One Per Family** check box if you want to print one label per family, and select a format type from the **Type** drop-down menu. Choose appropriate **Last Name** and **ZIP Code** sort order options.

Mr. Harper Cole 990 Pleasant Valley Run Laguna Niguel, CA 92653	Dr. Justin Crawford 1006 Carlota Lake Forest, CA 92630	Mr. Steven Davis 343 Haverford Ave, Laguna Niguel, CA 92653
Mr. Henry Mitchell 663 Tressle Way Lake Forest, CA 92630	Miss Michelle Radmore 343 Sierra Lane Mission Viejo, CA 92692	Margaret Ressler 33991 Festivo Mission Viejo, CA 92692
Miss Valerie Viega 16 Sandpiper Irvine, CA 92718		

Monthly Production Summary

The Monthly Production Summary report lists each item sold with the total quantity, amount, and percentage of total revenue for the period. This report includes year-to-date totals and totals for discounts, adjustments, returns, taxes collected and returned, and deposits. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Monthly Production Summary report, set the date parameters, select a production type from the **Type** drop-down menu, select a group from the Group drop-down menu, and select the **By Provider** check box if you want to sort the report by providers.

05/10/2005 5:03:49PM		Monthly Production Summary					
		Type = Financial Group					
		Date >= 04/10/2005					
		Date <= 05/10/2005					
Product Name	Description	Qty	Period Amount	%	Qty	Year-To-Date Amount	%
Handwritten & No Group							
AR	Anti-reflective Coating	2	100.00	7.06	8	524.00	9.39
Bitoric RGP	Bitoric Gas Permeable CL		0.00		2	280.00	5.02
Total Handwritten & No Group		2	100.00	7.06	10	804.00	14.41
Services							
Consultations							
99255	Inocient, Comorb, High Comorb.		0.00		1	0.00	
Total Consultations					1		
Contact Lens Fees							
92070	Treatment of disease contact Lens		0.00		1	0.00	
Total Contact Lens Fees					1		
Diagnostic Services Fees							
92085	Visual Fields - Tangent		0.00		2	30.00	0.54
92250	Fundus Photography		0.00		1	20.00	0.36
92286	Photography, Ant.Sec. Scocular M.		0.00		2	0.00	
Total Diagnostic Services Fees					5	50.00	0.90
Examination Fees							
92012	Exam - Intermediate Estab	2	130.00	8.31	2	130.00	2.33
99211	Level I, Established	1	25.00	1.61	1	25.00	0.45
99213	Level III, Established	2	138.00	8.86	4	276.00	4.95
99214	Level IV, Established	2	210.00	13.49	5	525.00	9.41
Total Examination Fees		7	503.00	32.31	12	956.00	17.13
No Group							
92287	Photography Ant.Sec. w/Fluorescein		0.00		2	0.00	
A4262	Temporary Absorbable Plugs	4	300.00	19.27	4	300.00	5.38
Total No Group		4	300.00	19.27	6	300.00	5.38
Total Services		11	803.00	51.57	25	1,306.00	23.41
Ophthalmic Materials Sales							
VRLOCK 760/1	VRLOCK 760/1	1	215.00	13.81	1	215.00	3.85
100 COACH ASTOR	100 COACH ASTOR	1	178.99	11.50	6	1,073.94	19.25
102 COACH CLAIRE	102 COACH CLAIRE		0.00		1	190.99	3.42
BFFT2528	Bifocal Lens	2	250.00	16.06	14	1,750.00	31.36
Total Ophthalmic Materials Sales		4	643.99	41.36	22	3,229.93	57.88
Contact Lens Fees							
Acuvue	Multicask Acuvue Lenses		0.00		8	240.00	4.30
Total Contact Lens Fees			0.00		8	240.00	4.30
			0.00			0.00	
Gross Fees Invoiced			1,596.99	100.00		5,579.93	100.00
Discounts, Adjustments & Returns							
(No Description)			0.00			0.00	
Billing Error			(50.00)			(70.00)	
Employee Discount			(1.00)			(1.00)	
Finance Charge			2,438.89			2,438.89	
Insurance Write-Off			(20.00)			(20.00)	
Late Charge			100.00			100.00	
Product Return			(75.00)			(75.00)	

05/10/2005 5:03:49PM		Monthly Production Summary					
		Type = Financial Group Date >= 04/10/2005 Date <= 05/10/2005					
Product Name	Description	Qty	Period Amount	%	Qty	Year-To-Date Amount	%
Total Discounts, Adjustments & Returns			2,392.89			2,372.89	
<u>Sales Tax</u>							
	Sales Tax		(0.01)			(0.01)	
Total Sales Tax			(0.01)			(0.01)	
			0.00			0.00	
Net Fees Invoiced			3,949.87			7,952.81	
<u>Insurance Charge Backs</u>							
	Insurance Charge Backs		80.00			80.00	
Total Insurance Charge Backs			80.00			80.00	
<u>Applied Payments</u>							
	Applied Insurance Payments		(79.00)			(79.00)	
	Applied Patient Payments		(972.30)			(1,012.30)	
	Patient Refunds		75.00			75.00	
Total Applied Payments			(976.30)			(1,016.30)	
			0.00			0.00	
Net Change to A/R			3,053.57			7,016.51	
<u>Deposits</u>							
Cash							
	Patient Payment		20.00			20.00	
Total Cash			20.00			20.00	
Checks							
	Insurance Payment		79.00			79.00	
	Patient Payment		1,004.30			1,044.30	
Total Checks			1,083.30			1,123.30	
Total Deposits			1,103.30			1,143.30	
<u>Refunds</u>							
	Refunds		(75.00)			(75.00)	
Total Refunds			(75.00)			(75.00)	
Net Receipts			3,185.57			7,148.51	

Note

The Net Change to A/R amounts, which is the difference between the Net Fees Invoiced and Total Applied Payments, can be used to balance your account receivables.

New Patient Demographics

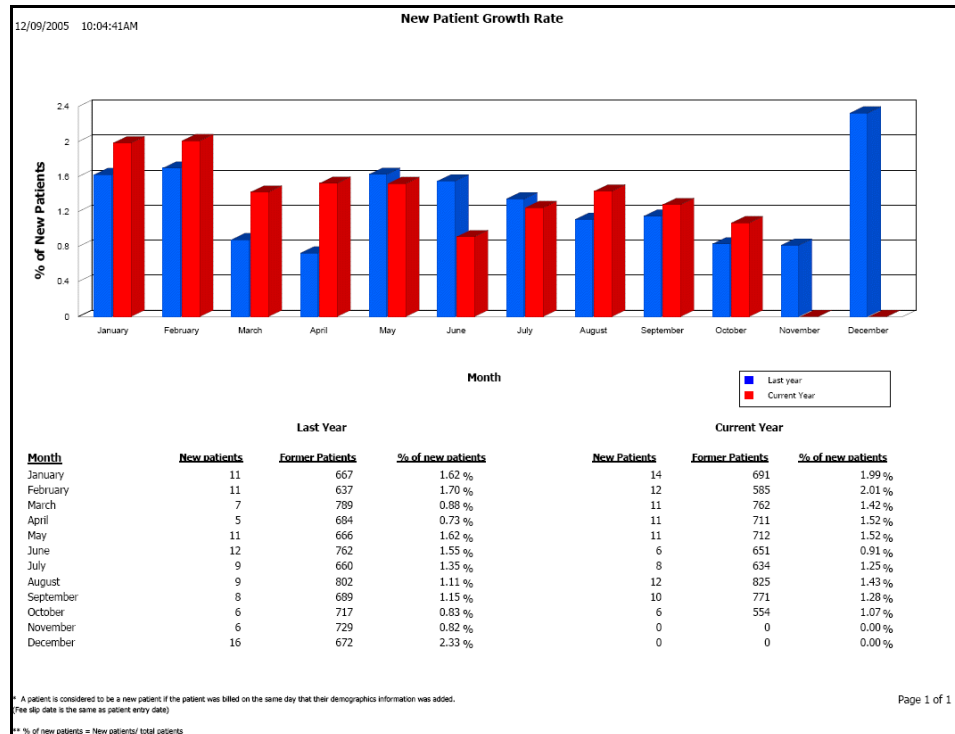
The New Patient Demographics report lists all new patients entered during the month. This report is categorized by age, Zip code, gender, insurance type, and city. OfficeMate suggests creating this report on demand.

- ❖ To create the New Patient Demographics report, select a month from the **Month Patient Added** drop-down menu.

05/10/2005 5:20:38PM		New Patient Demographics											
		Month Patient Added = May											
		This Year				Last Year				Change In Patients			
		Month	%	Year	%	Month	%	Year	%	Month	Totals	Year	Totals
		#		#		#		#		#	%	#	%
Age													
30 - 39		1	100	1	100					1	100	1	100
Total Age		<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>	<u></u>	<u></u>	<u></u>	<u></u>	<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>
Gender													
Male		1	100	1	100					1	100	1	100
Total Gender		<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>	<u></u>	<u></u>	<u></u>	<u></u>	<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>
Source													
Patient Referral		1	100	1	100					1	100	1	100
Total Source		<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>	<u></u>	<u></u>	<u></u>	<u></u>	<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>
Insurance Type													
(none)		1	100	1	100					1	100	1	100
Total Insurance Type		<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>	<u></u>	<u></u>	<u></u>	<u></u>	<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>
City													
Henderson		1	100	1	100					1	100	1	100
Total City		<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>	<u></u>	<u></u>	<u></u>	<u></u>	<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>
ZIP Code													
92048		1	100	1	100					1	100	1	100
Total ZIP Code		<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>	<u></u>	<u></u>	<u></u>	<u></u>	<u>1</u>	<u>100</u>	<u>1</u>	<u>100</u>

New Patient Growth Rate

The New Patient Growth Rate report displays the percentage of new patients versus former patients.



Open Charges

The Open Charges report displays outstanding open charges. OfficeMate suggests creating this report on demand.

- ❖ To create the Open Charges report, set the date parameters and click in the **Patient Name** text box to search for and select a patient.

05/30/2006 2:16:18PM		Open Charges				
		Date >= 05/30/2005				
		Date <= 05/30/2006				
		Patient Name = Sally Carter				
Patient Name	Date	Description	Order #	Unit Price	Qty	Total
Sally Carter	03/23/2006	Exam 11111	0	0.00	1	0.00
Sally Carter	05/30/2006	101 COACH ASTOR	44	178.99	1	178.99

Ophthalmic Lens Listing

The Ophthalmic Lens Listing report lists all ophthalmic lenses and their inventory. This report includes manufacturer names, descriptions, CPT codes, fees, costs, gross profit percentages, and product numbers. OfficeMate suggests creating this report on demand.

- ❖ To create the Ophthalmic Lens Listing report, select a manufacturer from the **Manufacturer** drop-down menu, select the **Inactive only** check box if you only want to display inactive lenses, and select the **Discontinued only** check box if you only want to display discontinued lenses.

05/30/2006 12:47:40PM

Ophthalmic Lens Listing

Manufacturer:

Name	Description	CPT	Size	BC	Sph	Cyl	Add	Fee	Cost	GP %	Product No	Active	Discontinued
BFF T25-28	Bifocal Lens	V2200						125.00		100.0	789	True	False
CR 39	Single Vision Plastic Len							65.00	32.00	50.8		True	False
OSMF	Oversize Lens	V2780	56									True	False
OSSV	Oversize Single Vision Lens											True	False
PROSTD	Progressive Standard Lens	V2200										True	False
TFF T25-28	Trifocal Lens	V2300										True	False
var	Varilux Progressive	V2200						88.00	65.00	26.1		True	False
VIP	Sola VIP											True	False
VSPMF	Standard Plastic/Glass Le							50.00		100.0		True	False
VSPSV	Standard Plastic/Glass Lens							44.00		100.0		True	False

Order Recommendation

Use the Order Recommendation report to order inventory. This report lists vendor names, product descriptions, UPCs, sizes, colors, stocking levels, amounts on-hand,

order quantities, unit costs, and extended costs. OfficeMate suggests creating this report on demand.

- ❖ To create the Order Recommendation report, click in the **Vendor Name** text box and select a vendor name.

Product		Product Code	UPC	Size	Color	Minimum Stock Level	On Hand	On Order	Order Qty	Unit Cost	Extended
Vendor Essilor Of America, Inc.											
Progressive - K				0.00/0.00/0.00		1	0	0	1	0.00	0.00
											0.00
											0.00
Total Report											0.00

Other Product Listing

The Other Product Listing report lists all other products and their inventory. This report includes manufacturers, names, descriptions, CPT codes, fees, costs, gross profit percentages, and product numbers. OfficeMate suggests creating this report on demand.

- ❖ To create the Other Product Listing report, select a manufacturer from the **Manufacturer** drop-down menu, select the **Inactive only** check box if you only want to display inactive products, and select the **Discontinued only** check box if you only want to display discontinued products.

05/30/2006 12:50:05PM		Other Products Listing						
Manufacturer:								
<u>Name</u>	<u>Description</u>	<u>CPT</u>	<u>Fee</u>	<u>Cost</u>	<u>GP %</u>	<u>Product No</u>	<u>Active</u>	<u>Discontinued</u>
Accessories								
11440	Exdsion, Benign 0.5 CM or Less	11440					True	False
Other								
AR	Anti-reflective Coating		69.00	11.00	84.1		True	False
Gift Certificate	Gift Certificate						True	False
TINT	Tint - Plastic Solid	V2741	26.00	9.00	65.4		True	False
TINTPG	Tint - Plastic Gradient		29.00	7.00	75.9		True	False
UV	UV coating	V2755	23.00		100.0		True	False

Patient Aging - Detail

The Patient Aging - Detail report lists all patients with an outstanding balance aged 30, 60, 90, and 120 days. This report includes patient names, guarantor names, home phone numbers, amounts owed, providers, and aged percentages outstanding. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Patient Aging - Detail report, set the period end date parameters, select a provider from the **Provider** drop-down menu, and choose appropriate **Guarantor Name** and **Patient Name** sort order options.

05/11/2005 9:44:23AM

Patient Aging Detail

Period end <= 05/10/2005

Patient	Guarantor	Day Phone	Fee Slip	Posted	Total	Current	31-60	61-90	91-120	> 120	UnApp	Last Pmt
Carter, Sally	Carter, Sally		86	04/27/2005							(96.00)	05/04/2005
			92	05/09/2005	87.50	87.50					0.00	05/04/2005
			Patient Total		87.50	87.50	0.00	0.00	0.00	0.00	(96.00)	
Cole, Harper	Cole, Harper	(949) 433-7896	68	08/21/2002	961.88					961.88	0.00	08/21/2002
			79	03/10/2005	1,447.94			1,447.94			0.00	08/21/2002
			80	03/11/2005	465.98		465.98				0.00	08/21/2002
			81	03/11/2005	526.21		526.21				0.00	08/21/2002
			82	03/11/2005	230.35		230.35				0.00	08/21/2002
			83	03/14/2005	584.03		584.03				0.00	08/21/2002
			84	03/16/2005	517.91		517.91				0.00	08/21/2002
			85	03/16/2005	32.48		32.48				0.00	08/21/2002
			93	05/09/2005	797.49	797.49					0.00	08/21/2002
			Patient Total		5,564.27	797.49	2,356.96	1,447.94	0.00	961.88	0.00	
Crawford D.D.S, Justin R	Crawford, Justin	(949) 421-6000	74	07/30/2003	406.44					406.44	0.00	07/30/2003
			Patient Total		406.44	0.00	0.00	0.00	0.00	406.44	0.00	
Mitchell, Henry A	Mitchell, Henry		70	08/21/2002	187.45					187.45	0.00	05/04/2005
			Patient Total		187.45	0.00	0.00	0.00	0.00	187.45	0.00	
Radmore, Michelle	Radmore, Michelle		45	09/17/1999	(50.00)					(50.00)	(147.94)	04/05/2005
			Patient Total		(50.00)	0.00	0.00	0.00	0.00	(50.00)	(147.94)	
Resler, Margaret	Resler, Margaret		78	07/30/2003	619.16					619.16	0.00	07/30/2003
			Patient Total		619.16	0.00	0.00	0.00	0.00	619.16	0.00	
Underwood, Jennifer	Underwood, James		76	07/30/2003	128.85					128.85	0.00	05/04/2005
			Patient Total		128.85	0.00	0.00	0.00	0.00	128.85	0.00	
Viega, Valerie	Viega, Valerie										(20.00)	
			Patient Total		0.00	0.00	0.00	0.00	0.00	0.00	(20.00)	
			Report Total		6,943.67	884.99	2,356.96	1,447.94	0.00	2,253.78	(257.94)	
Percent of Total						12.75	33.94	20.85	0.00	32.46		
A/R Total w/Unapplied					6,685.73							

Patient Aging - Summary

The Patient Aging - Summary report lists all patients with an outstanding balance aged 30, 60, 90, and 120 days. This report includes providers and aged percentages outstanding. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Patient Aging - Summary report, set the period end date parameters, select a provider from the **Provider** drop-down menu, and choose appropriate **Guarantor Name** and **Patient Name** sort order options.

05/11/2005 9:56:31AM		Patient Aging Summary Period end <= 05/10/2005									
Patient	Guarantor	Daytime Phone	Flags	Total	Current	31-60	61-90	91-120	> 120	UnApp	Last Pmt
Carter, Sally	Carter, Sally		BadAddr	87.50	87.50					(90.00)	05/04/2005
Ole, Harper	Ole, Harper	(949) 433-7896		5,564.27	737.49	2,356.96	1,447.94		961.88		08/21/2002
Cravford D.D.S. Justin R	Cravford, Justin	(949) 421-6000		406.44					406.44		07/30/2003
Michell, Henry A	Michell, Henry			187.45					187.45		05/04/2005
Radmore, Michelle	Radmore, Michelle			(50.00)					(50.00)	(147.34)	04/05/2005
Ressler, Margaret	Ressler, Margaret			619.16					619.16		07/30/2003
Underwood, Jennifer	Underwood, James		BadAddr	128.85					128.85		05/04/2005
Vega, Valerie	Vega, Valerie			0.00						(20.00)	
Report Total				6,943.67	884.99	2,356.96	1,447.94	0.00	2,253.78	(257.94)	
Percent of Total					12.75	33.94	20.85	0.00	32.46		
A/R Total w/Unapplied				6,685.73							

Patient Credit Refund

The Patient Credit Refund report displays the credits and unapplied amounts that were refunded to patients in the Patient Credit Refund window and allows you to refund a patient credit. This report is an audit of all credit refunds. OfficeMate suggests creating this report on demand.

- ❖ To create the Patient Credit Refund report, set the refund date parameters, click in the **Patient Name** text box and find and select a patient, and select the **By Provider** check box if you want to sort the report by providers.

05/11/2005 10:40:45AM		Patient Credit Refund Refund Date >= 01/01/2001 Refund Date <= 05/11/2005 Patient Name = Sally Carter					
Refund Date	Patient Name	Dep. no	Refund Type	Description	Amount	Reason	Recorded By
05/11/2005	Carter, Sally	89	Cash		\$90.00		Franklin Helen

Patient Demographics

The Patient Demographics report lists all patients in your database and categorizes them by age, Zip code, gender, source, insurance type, and city. OfficeMate suggests creating this report on demand.

Patient Demographics		
	<u>Patient Total</u>	<u>Percent of Total</u>
Age		
10 - 19	1	9
30 - 39	4	36
40 - 49	2	18
50 - 59	3	27
70 - 79	1	9
Total Age	11	100
Gender		
Female	6	55
Male	5	45
Total Gender	11	100
Source		
Patient Referral	4	36
Professional Referral	5	45
Walk in Patient	1	9
Yellow Pages	1	9
Total Source	11	100
Insurance Type		
(none)	3	27
Champus	1	9
Medicare	1	9
PPO	5	45
Private Pay	1	9
Total Insurance Type	11	100
City		
Henderson	1	9
Irvine	1	9
La Jolla	2	18
Lake Forest	2	18
Mission Viejo	4	36
San Juan Capistrano	1	9
Total City	11	100
ZIP Code		
92048	1	9
92630	2	18
92653	2	18
92675	1	9
92692	4	36
92718	1	9
Total ZIP Code	11	100

Patient List

The Patient List report lists all patients in your database including their cities, states, ZIP codes, home phone numbers, day phone numbers, patient numbers, and chart numbers. OfficeMate suggests creating this report on demand.

- ❖ To create the Patient List report, select ZIP code parameters from the ZIP Code drop-down menus, select a city from the **City** drop-down menu, select the **By Provider** check box if you want to sort the report by providers, and select a provider from the **Provider** drop-down menu. Choose appropriate **Last Name**, **City**, and **ZIP Code** sort order options.

05/11/2005 11:37:05AM		Patient Listing					
Patient Name	Address	City	State	ZIP Code	Home Phone	Day Phone	Acct Chart #
Abdul, Dandan	40388 County Road 2	Henderson	NE	92048		(856) 969-9999	14
Carter, Sally	9696 Calle Dulce	San Juan Capistrano	CA	92675	(949) 555-1236		3
Cole, Harper	990 Pleasant Valley Run	Laguna Niguel	CA	92653	(949) 555-7896	(949) 433-7896	10
Crawford D.D.S, Justin F	1006 Carlota	Lake Forest	CA	92630	(949) 555-8523	(949) 421-6000	12
Davis, Steven	343 Haverford Ave,	Laguna Niguel	CA	92653	(949) 555-7463		8
Mitchell, Henry A	663 Tressle Way	Lake Forest	CA	92630	(949) 588-6321		1
Radmore, Michelle	343 Sierra Lane	Mission Viejo	CA	92692	(949) 565-8874		2
Ressler, Margaret	33991 Festivo	Mission Viejo	CA	92692	(949) 365-8874		9
Underwood, Jennifer	49060 Pacific Heights Drive	Mission Viejo	CA	92692	(949) 555-8631		5 78070-97
Underwood, Tracy	49060 Pacific Heights Drive	Mission Viejo	CA	92692	(949) 555-8631		11
Viega, Valerie	16 Sandpiper	Irvine	CA	92718	(949) 525-4733		4
Total Patients: 11							

Patients in Quick List

Use the Patients in Quick List report as an audit report to compare patients accessed in OfficeMate to those charged during the day. This report lists all patients in the OfficeMate Information Center window at the time the report is created and printed. OfficeMate suggests creating this report on demand.

05/11/2005 11:47:21AM		Patients In Quick List				
New	Last Name	First Name	Initial	Phone	HIPAA	Appt Time
No	Abdul	Dandan		(856) 969-9999	Not Read	

Patients w/No Recall Date

The Patients w/No Recall Date report lists patients in your database who do not have recall dates. OfficeMate suggests creating this report on demand.

05/11/2005		Patients w/NO Recall Date				12:05 pm
Last Name	First Name	Initial	Home Phone	Day Phone		
Abdul	Dandan			(856) 969-9999		

Patients w/Past Due Recall Date

The Patient w/Past Due Recall Date report lists patients in your database who have recall dates that are past due.

- ❖ To create the Patient w/Past Due Recall Date report, set the recall date parameters. OfficeMate suggests creating this report on demand.

05/11/2005		Patients with Past Due Recall				1:31 pm
		Recall Date >= 01/01/2001				
		Recall Date <= 05/10/2005				
Last Name	First Name	Initial	Phone	Recall Date	Recall Type	
Crawford	Justin	R	(949) 421-6000	05/16/2004	Glaucoma	
Crawford	Justin	R	(949) 421-6000	02/08/2005	12 Month	
Davis	Steven			07/30/2004	Diabetic 12 month	
Mitchell	Henry	A		08/21/2003	12 Month	
Radmore	Michelle			01/30/2004	CL recheck - 6 months	
Radmore	Michelle			07/30/2004	12 Month	
Ressler	Margaret			07/30/2004	12 Month	
Underwood	Jennifer			07/30/2004	12 Month	
Underwood	Tracy			08/21/2003	12 Month	
Wieg	Valerie			12/03/2001	12 Month	

Post Card

The Post Card report prints post cards. OfficeMate suggests creating post cards on demand. Print postcards using postcard stock with four cards on 8½" x 11" sheets. You can purchase postcards from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com or from Marchon Eyewear at 1.800.645.1300.

- ❖ To print post cards, select a city from the **City** drop-down menu, select a state from the **State** drop-down menu, select the **One Per Family** check box if you only want to print one post card per family, and select a printing type from the **Type** drop-down menu. Choose appropriate **Last Name** and **ZIP Code** sort order options. After you click **Preview**, type the post card text in the Post Card Message window and click **Save**.

Dear Patient:

Your next appointment is scheduled for 11/11/05.
Please call our office if you have a conflict with
this date. Thank you!

Dandan Abdul
40388 County Road 2
Henderson, NE 68048

Procedure Code Listing

The Procedure Code Listing report lists all procedure codes that are setup in the Customization window. OfficeMate suggests creating this report on demand.

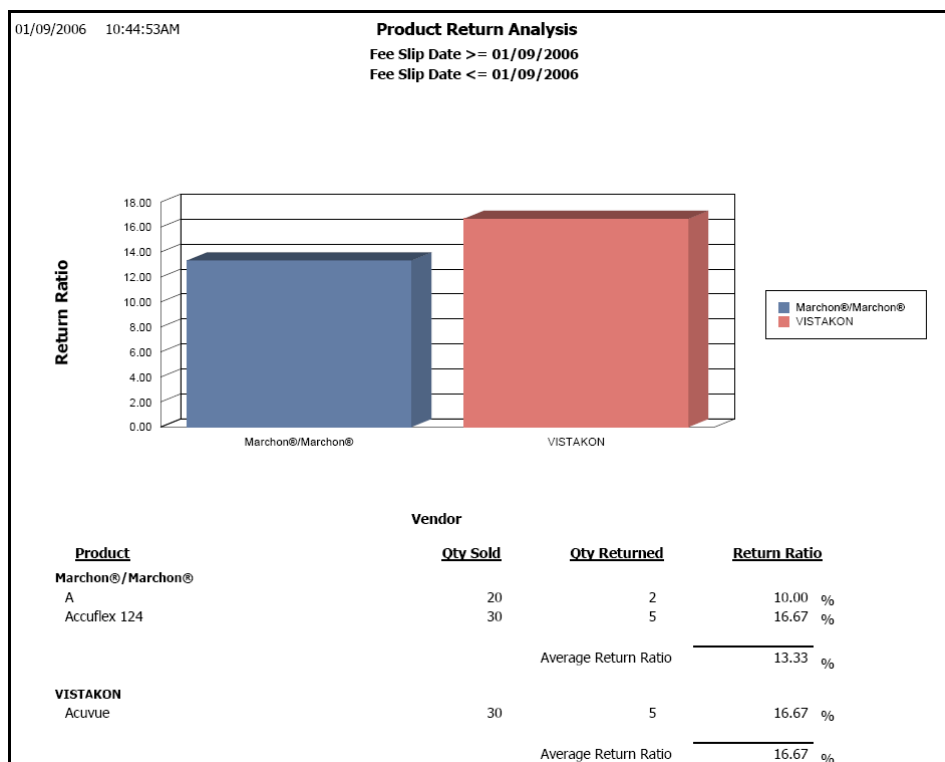
- ❖ To create the Procedure Code Listing report, select appropriate **Procedure Code** and **Procedure Description** sort order options.

05/11/2005 2:33:35 PM		Procedure Code Listing				
Code	Description	Type of Service	Min	Units	Financial Group	Production Group
11440	Excision, Benign 0.5 CM or Less	Medical Care	0	1		
11441	Excision, Benign 0.6-1.0 CM	Medical Care	0	1		
11442	Excision, Benign 1.1-2.0 CM	Medical Care	0	1		
11443	Excision, Benign 2.1-3.0 CM	Medical Care	0	1		
11444	Excision, Benign 3.1-4.0 CM	Medical Care	0	1		
11446	Excision, Benign Over 4.0 CM	Medical Care	0	1		
11640	Excision, Malignant 0.5 CM-Less	Medical Care	0	1		
11641	Excision, Malignant 0.6-1.0 CM	Medical Care	0	1		
11642	Excision, Malignant 1.1-2.0 CM	Medical Care	0	1		
11643	Excision, Malignant 2.1-3.0 CM	Medical Care	0	1		
11644	Excision, Malignant 3.1-4.0 CM	Medical Care	0	1		
11646	Excision, Malignant Over 4.0 CM	Medical Care	0	1		
11780	Eye Exam + Refraction	Medical Care	0	1		
12001	Eye Exam / Wears Glasses	Medical Care	0	1		
12011	Repair Wound, Simple 2.5 CM-Less	Medical Care	0	1		
12013	Repair Wound, Simple 2.6-5.0 CM	Medical Care	0	1		
12051	Repair Wound, Inter. 2.5 CM-Less	Medical Care	0	1		
12052	Repair Wound, Inter. 2.6-5.0 CM	Medical Care	0	1		
12053	Repair Wound, Inter. 5.1-7.5 CM	Medical Care	0	1		
12054	Repair Wound, Inter. 7.6-12.5 CM	Medical Care	0	1		
13141	Repair Wound, Complex 1.1-2.5 CM	Medical Care	0	1		
13150	Repair Wound, Complex 1.0 CM-Less	Medical Care	0	1		
13152	Repair Wound, Complex 2.6-7.5 CM	Medical Care	0	1		
13780	Eye Exam / Does Not Wear Glasses	Medical Care	0	1		
14060	Tissue Transfer, 10 sq CM-Less	Medical Care	0	1		
14061	Tissue Transfer, 10.1-30 sq CM	Medical Care	0	1		
15250	Full Thick. Graft, 20 sq CM-Less	Medical Care	0	1		
15261	Full Thick. Graft, Ea.Add. 20 sqC	Medical Care	0	1		
15820	Blepharoplasty, Lower Lid	Medical Care	0	1		
15821	Blepharoplasty, Lower Lid w/ Skin	Medical Care	0	1		
15822	Blepharoplasty, Upper Lid	Medical Care	0	1		
15823	Blepharoplasty, Upper Lid w/ Fat	Medical Care	0	1		
46625	Peripheral Iridectomy	Medical Care	0	1		
46680	Repair Iris, CB (dialysis)	Medical Care	0	1		
46682	Suture Iris CB (SP)	Medical Care	0	1		
65091	Evisceration, w/o implant	Medical Care	0	1		
65093	Evisceration, w/ implant	Medical Care	0	1		
65101	Enucleation, w/o implant	Medical Care	0	1		

Product Return Analysis

The Product Return Analysis report displays the ratio of products returned to products sold.

- ❖ To create the Product Return Analysis report, set the fee slip date parameters, select a product type from the **Product Type** drop-down menu, and select a vendor from the **Vendor** drop-down menu.



Product Transaction Details

The Product Transaction Details report lists product descriptions, UPCs, sizes, colors, transaction dates, transaction types, quantities, costs, and extended costs. OfficeMate suggests creating this report on demand.

- ❖ To create the Product Transaction Detail report, set the transaction date parameters.

05/11/2005 2:56:04PM		Product Transaction Detail Report						
		Transaction Date >= 05/01/2005						
		Transaction Date <= 05/11/2005						
Product	Product Code/UPC	Size	Color	Date	Type	Qty	Cost	Extended
IRLOCK 760/1	679516691691	53.0,140.53,37.5,55.5	GUNMETAL	05/09/2005	Sale	1	89.95	89.95
								89.95
01 COACH ASTOR	679516719302	52.0,140.52,29.5,54.5	SAND	05/09/2005	Adjustment	5	59.95	299.75
01 COACH ASTOR	679516719289	50.0,140.50,28.5,52.5	SAND	05/09/2005	Adjustment	5	59.95	299.75
01 COACH ASTOR	679516719043	52.0,140.52,29.5,54.5	GUNMETAL	05/09/2005	Adjustment	5	59.95	299.75
01 COACH ASTOR	679516719029	50.0,140.50,28.5,52.5	GUNMETAL	05/09/2005	Adjustment	5	59.95	299.75
01 COACH ASTOR	679516719173	52.0,140.52,29.5,54.5	COFFEE	05/09/2005	Adjustment	5	59.95	299.75
01 COACH ASTOR	679516719159	50.0,140.50,28.5,52.5	COFFEE	05/09/2005	Adjustment	5	59.95	299.75
01 COACH ASTOR	679516719302	52.0,140.52,29.5,54.5	SAND	05/09/2005	Receive	3	59.95	179.85
01 COACH ASTOR	679516718918	52.0,140.52,29.5,54.5	BLACK	05/09/2005	Sale	1	59.95	59.95
								2,038.30
CINDERELLA	679516757649	42.0,115.41,28.41.5	PINK	05/09/2005	Adjustment	1	44.95	44.95
CINDERELLA	679516757625	40.0,115.39,26.39.5	PINK	05/09/2005	Adjustment	1	44.95	44.95
CINDERELLA	679516757601	38.0,110.37,24.37.5	PINK	05/09/2005	Adjustment	1	44.95	44.95
CINDERELLA	679516757151	38.0,110.37,24.37.5	MOCHA	05/09/2005	Adjustment	1	44.95	44.95
								179.80
Report total								2,308.05

Products Sold

The Products Sold report lists the products that were sold for the entered date range. OfficeMate suggests creating this report on a yearly basis.

- ❖ To create the Products Sold report, set the fee slip date parameters and select a product type from the **Type** drop-down menu.

05/11/2005 3:10:21PM		Contact Lenses Sold										
		Fee Slip Date >= 05/10/2004										
		Fee Slip Date <= 05/10/2005										
Manufacturer: Specialty Cls												
Vendor: Specialty Cls												
Category: Rigid Bitoric												
Qty	Name	Unit	BC	Dia	Sph	Cyl	Axis	Add	Tint	Product Code	Unit Cost	Extended Cost
2	Bitoric RGP	Each							Handling Tint		45.00	90.00
2												90.00
Manufacturer: Vistakon, Inc. [800-874-5278]												
Vendor: Vistakon, Inc. [800-874-5278]												
Category: Soft Sphere Disposable												
Qty	Name	Unit	BC	Dia	Sph	Cyl	Axis	Add	Tint	Product Code	Unit Cost	Extended Cost
7	AQUVUE	Pack							Clear		15.99	111.93
1	AQUVUE	Pack	8.8	14.0	-1.00				Clear	733905100079	15.99	15.99
8												127.92

Production

The Production report lists each item sold with the total quantity, amount, and percentage of total revenue for the period.

- ❖ To create the Production report, set the date parameters, select a provider from the **Provider** drop-down menu, select a sort order type from the **Type** drop-down menu, and select a group from the **Group** drop-down menu.

05/11/2005 4:31:35PM		Production Report		
		Type = Financial Group		
		Date > = 04/05/2005		
		Date < = 05/05/2005		
<u>Product Name</u>	<u>Description</u>	<u>Quantity</u>	<u>Amount</u>	<u>%</u>
Services				
Examination Fees				
92012	Exam - Intermediate Estab	2	130.00	58.04
99211	Level I, Established	1	25.00	11.16
99213	Level III, Established	1	69.00	30.80
Total Examination Fees		4	224.00	100.00
No Group				
A4262	Temporary Absorbable Plugs	1	0.00	
Total No Group		1	0.00	
		Total Services	5	224.00 100.00
		Gross Fees Invoiced		224.00 100.00
Discounts, Adjustments & Returns				
			(50.00)	
Billing Error			2,438.89	
Finance Charge			(20.00)	
Insurance Write-Off			100.00	
Late Charge			(75.00)	
Product Return				
Total Discounts, Adjustments & Returns			2,393.89	
			Net Fees Invoiced	2,617.89
Deposits				
Cash				
Patient Payment			20.00	
Total Cash			20.00	
Checks				
Patient Payment			1,044.30	
Total Checks			1,044.30	
Total Deposits			1,064.30	
Refunds				
Refunds			(75.00)	
Total Refunds			(75.00)	
Net Receipts				989.30

Notes

- The Gross Fee Invoiced amount matches the Daily Production and Fee Slip Detail reports.
- The Total Discounts, Adjustments & Returns amount matches the Daily Production Summary.
- The Sales Tax amount matches the Daily Production Summary and Fee Slip Detail reports.
- The Sales Tax on Return amount matches the Daily Production Summary.
- The Net Fees Invoiced amount matches the Daily Production Summary and Fee Slip Detail reports.
- The Deposits amount matches the Day Sheet, Deposit Ticket, and Daily Production Summary reports.
- The Refunds amount matches the Returns and Refunds report.

Provider Commission Detailed

The Provider Commission Detailed report lists provider names, products, fee slip numbers, charges, flat commissions, commission percentages, spiffs, and total commissions. OfficeMate suggests creating this report on demand.

- ❖ To create the Provider Commission Detailed report, set the fee slip date parameters, select a provider from the **Provider** drop-down menu, and select the **1 Provider per Page** check box if you only want to print one provider per page.

05/11/2005 4:40:34PM		Provider Commission Report - Detailed					
		Fee Slip Date >= 04/11/2005 Fee Slip Date <= 05/11/2005					
Provider	Product	Fee Slip	Charge	Flat Comm	Comm%	Spiff	Total Commission
Miller, O.D. Michael	VRLOCK 760/1	92	214.99		0.00	50.00	50.00
	101 COACH ASTOR	93	178.99		0.00	50.00	50.00
	Anti-reflective Coating	93	41.00		0.00	50.00	50.00
	Anti-reflective Coating	93	69.00		0.00	50.00	50.00
	Bifocal Lens	93	125.00		0.00	50.00	50.00
	Bifocal Lens	93	125.00		0.00	50.00	50.00
	Exam - Intermediate Estab	86	65.00		0.00	50.00	50.00
	Exam - Intermediate Estab	86	65.00		0.00	50.00	50.00
	Level I, Established	86	25.00		0.00	50.00	50.00
	Level III, Established	93	69.00		0.00	50.00	50.00
	Level IV, Established	93	105.00		0.00	50.00	50.00
	Level IV, Established	93	105.00		0.00	50.00	50.00
	Temporary Absorbable Plugs	87	0.00		0.00	50.00	50.00
	Temporary Absorbable Plugs	89	100.00		0.00	50.00	50.00
	Temporary Absorbable Plugs	90	99.00		0.00	50.00	50.00
	Temporary Absorbable Plugs	91	200.00		0.00	50.00	50.00
	Temporary Absorbable Plugs	94	100.00		0.00	50.00	50.00
Provider Subtotal:							850.00
Total:							850.00

Provider Commission Summary

The Provider Commission Summary report lists provider names, charges, and commissions. OfficeMate suggests creating this report on demand.

- ❖ To create the Provider Commission Summary report, set the fee slip date parameters, select a provider from the **Provider** drop-down menu, and choose appropriate **Provider** and **Product** sort order options.

05/11/2005 5:12:23PM		Provider Commission Report - Summary	
		Fee Slip Date >= 04/05/2005 Fee Slip Date <= 05/05/2005	
Provider	Charge	Commission	
Miller, O.D. Michael	155.00	200.00	
Total:		200.00	

Provider Listing

The Provider Listing report lists all providers and their details that are setup in the Business Names window. OfficeMate suggests creating this report on demand.

- ❖ To creating the Provider Listing report, select a provider from the **Provider** drop-down menu and select an appropriate **Provider** sort option.

05/11/2005 5:20:37PM		Provider Listing			
Name	Duncan, Tom	Tax Id No.		Type	
Phone		UPIN No.		NPI No.	
Fax		TPA No.		EIN No.	
License		Sub Id		HIPAA Officer	No
Provider	No	Active	Yes	HIPAA Training	No
Name	Franklin, Helen	Tax Id No.		Type	
Phone		UPIN No.		NPI No.	
Fax		TPA No.		EIN No.	
License		Sub Id		HIPAA Officer	Yes
Provider	No	Active	Yes	HIPAA Training	No
Name	Miller, O.d., Michael	Tax Id No.	66-456872	Type	Solo Practice
Phone	949 727 7080	UPIN No.	123646	NPI No.	
Fax	949 727 7479	TPA No.	345-454-234	EIN No.	
License	4646-89	Sub Id		HIPAA Officer	No
Provider	Yes	Active	Yes	HIPAA Training	No
Name	Ruiz, M.d., Raymond	Tax Id No.	234 33 4556	Type	Corporation
Phone	(949) 754-5000	UPIN No.	24332	NPI No.	
Fax	(949) 727-7479	TPA No.	TCA23555554	EIN No.	
License	CA89751	Sub Id		HIPAA Officer	No
Provider	Yes	Active	Yes	HIPAA Training	No
Name	Thomas, O.d., David	Tax Id No.	454 77 1234	Type	Clinic
Phone	949 727 7080	UPIN No.	341343	NPI No.	
Fax	949 727 7479	TPA No.		EIN No.	
License	4524245	Sub Id		HIPAA Officer	No
Provider	Yes	Active	Yes	HIPAA Training	No

Purchase Order

The Purchase Order report allows you to print or reprint a purchase order. OfficeMate suggest printing or reprinting purchase orders on demand.

- ❖ To print or reprint a purchase order, set the PO date parameters.

05/11/2005 5:27:08PM		Purchase Order		
Ordered By : Helen Franklin 15375 Barranca Pkwy, Bldg L Irvine CA 92618		Purchase Order : 3 Reference No: Account No: Date Issued: 05/09/2005 Office Phone: 800-269-3666		
To : Marchon Eyewear, Inc. 35 Hub Drive Melville, NY 11747		Ship To : OfficeMate Software Solutions 15375 Barranca Pkwy, Bldg L Irvine CA 92618		
Qty	Product Description	Patient	Unit Price	Total
5	101 COACH ASTOR, 679516719302, 52,0,140,52,29.5,54.5, SAND		59.95	299.75
			Total :	\$299.75
Authorized Signature : _____				

Purchase Order - Back Order

The Purchase Order - Back Order report lists back ordered purchase orders. OfficeMate suggests creating this report on demand.

- ❖ To create the Purchase Order - Back Order report, set the back order date parameters.

05/11/2005 5:33:33PM		Purchase Order - Back Order Report								
Back Order Date >= 03/07/2001										
Back Order Date <= 06/07/2005										
Vendor	Product	Product Code/UPC	Size	Color	Patient	BO Date	PO No	Qty	Cost	Extended
Marchon Eyewear, Inc.										
VRLOOK: 760/1		679516691691	53,0,140,53,37.5,55.5	GUNMETAL	Dandan Abdul	6/1/2005	4	1	89.95	89.95
									Total Vendor	89.95
									Total Product	89.95

Purchase Order Detailed

The Purchase Order Detailed report lists purchase orders in detail. OfficeMate suggests creating this report on demand.

- ❖ To create the Purchase Order Detailed report, click in the **Vendor Name** text box to select a vendor, select a purchase order status from the **PO Status** drop-down menu, and set the PO date parameters.

05/12/2005	9:36:13AM	Purchase Order - Detailed							
		All Orders							
		PO Date >= 01/01/2001							
		PO Date <= 05/11/2005							
Vendor Name:	Marchon Eyewear, Inc.	Order Date : 5/9/2005							
Order No:	3								
Note:									
Status:	In Process								
Product	Product Code/UPC	Size	Color	Qty Ordered	Qty Received	Cost	Extended Cost Value	Back Order Date	Patient Name
101 COACH ASTOR	679516719302	52,0,140,52,29,5,54,5	SAND	5	3	59.95	299.75		
Vendor Name:	Marchon Eyewear, Inc.	Order Date : 5/11/2005							
Order No:	4								
Note:									
Status:	In Process								
Product	Product Code/UPC	Size	Color	Qty Ordered	Qty Received	Cost	Extended Cost Value	Back Order Date	Patient Name
VRLOCK 760/1	679516691691	53,0,140,53,37,5,55,5	GUMMETAL	1	0	89.95	89.95	06/01/2005	Dandan Abdul
Total Vendor							389.70		
Total Report							389.70		

Purchase Order Summary

The Purchase Order Summary report summarizes purchase orders. OfficeMate suggests creating this report on demand.

- ❖ To create the Purchase Order Summary report, click in the **Vendor Name** text box to select a vendor, select a purchase order status from the **PO Status** drop-down menu, and set the PO date parameters.

05/12/2005	9:53:40AM	Purchase Order - Summary			
		All Orders			
		PO Date >= 01/01/2001			
		PO Date <= 05/11/2005			
Order No	Order Date	Vendor	Status	Total Cost	Note
3	5/9/2005	Marchon Eyewear, Inc.	In Process	\$299.75	
4	5/11/2005	Marchon Eyewear, Inc.	In Process	\$89.95	

Receipts Journal

The Receipts Journal report lists all payments received for the selected posting date range. Payors (individuals or insurance companies) are listed in alphabetic order and display the date, payment type description, and amount. OfficeMate suggests creating this report on a daily basis.

- ❖ To create the Receipts Journal report, set the posting date parameters.

05/12/2005 10:04:50AM		Receipts Journal			
		Posting Date >= 05/01/2005			
		Posting Date <= 05/11/2005			
<u>Payor</u>	<u>Date</u>	<u>Payment Type</u>	<u>Check No</u>	<u>Bank No</u>	<u>Amount</u>
Mitchell, Henry A	05/02/2005	Check			20.00
				Total for 05/02/2005	20.00
Carter, Sally	05/03/2005	Check			90.00
				Total for 05/03/2005	90.00
Mitchell, Henry A	05/04/2005	Check			613.59
Underwood, Jennifer	05/04/2005	Check			280.71
Carter, Sally	05/04/2005	Cash			20.00
Carter, Sally	05/04/2005	Other Credit	Discover/Credit		(75.00)
				Total for 05/04/2005	839.30
Eye Care Plan Of America - Region 1	05/09/2005	Check			30.00
Eye Care Plan Of America - Region 1	05/09/2005	Check			25.00
Medicare	05/09/2005	Check			24.00
				Total for 05/09/2005	79.00
Report Total					1,028.30

Re-Do Lab Orders

The Re-Do Lab Orders report displays a list of lab orders that were redone. OfficeMate suggests creating this report on demand.

- ❖ To create the Re-Do Lab Orders report, set the order date parameters.

05/30/2006 2:24:02PM		Re-Do Lab Order			
		Order Date >= 05/30/2005			
		Order Date <= 05/30/2006			
<u>Patient Name</u>	<u>Order #</u>	<u>Order Date</u>	<u>ReDo Of</u> (Order # and Date)		<u>Special Instructions</u>
Carter, Sally	39	03/24/2006	34	03/24/2006	
Carter, Sally	40	03/24/2006	34	03/24/2006	
Carter, Sally	41	03/24/2006	33	03/24/2006	
Davis, Steven J	46	05/10/2006	45	05/10/2006	
Davis, Steven J	47	05/10/2006	46	05/10/2006	None.

Referrals

The Referrals report lists all referrals to your office and who referred them. OfficeMate suggests creating this report on a yearly basis.

- ❖ To create the Referrals report, select the month the patient was added to OfficeMate from the **Month Patient Added** drop-down menu and select a sort order from the **By** drop-down menu.

05/12/2005 10:31:53AM			
Referrals by Referring Patient			
Month Patient Added = May			
Referring Patient	Month Referred Patients	Year To Date Referred Patients	Last Year Referred Patients
Ressler, Margaret		Cole, Harper	
Underwood, Jennifer		Davis, Steven	
Total Referred	0	2	0

Returns And Refunds

The Returns And Refunds report lists all returns and refunds by product type, fee slip date, or provider. OfficeMate suggests creating this report on demand.

- ❖ To create the Returns And Refunds report, set the return date parameters, select the **By Provider** check box if you want to sort the report by providers, select a provider from the **Provider** drop-down menu, and select a product type from the **Product Type** drop-down menu.

05/12/2005 10:50:50AM		Returns And Refunds Return Date >= 05/12/2004 Return Date <= 05/12/2005									
Fee Slip No	Fee Slip Date	Patient Name	Product Returned	Qty	Return Type	Date of Return	Product Return	Refund/Credit	Non-Ref Amount	Refund Method	Recorded By
65	02/12/2002	Sally Carter	92014	1	Damaged	05/04/2005	75.00	75.00		Discover	Franklin, Helen
Report Totals							75.00	75.00	0.00		
Refund Total								75.00			
Credit Total								0.00			

Notes

- The Product Return column total matches the Total Patient Return amount on the Day Sheet report and the Returns amount on the Fee Slip Detail report.
- The Refund Total amount matches the Refund Total amount on the Daily Production Summary and Production reports.

Sales Tax

The Sales Tax report lists each item on which sales tax was collected for the selected posting date range. This report includes fee slip numbers, dates, products, amounts charged, tax 1, tax 2, and total tax. OfficeMate suggests creating this report on a daily basis.

- ❖ To create the Sales Tax report, set the posting date parameters.

05/12/2005 11:07:50AM		Sales Tax Register								
		Posting Date >= 05/12/2004								
		Posting Date <= 05/12/2005								
			Patient				Insurance			
<u>Fee Slip</u>	<u>Date</u>	<u>Product</u>	<u>Charge</u>	<u>Tax 1</u>	<u>Tax 2</u>	<u>Total Tax</u>	<u>Charge</u>	<u>Tax 1</u>	<u>Tax 2</u>	<u>Total Tax</u>
Eye Care Plan Of America - Region 1										
	92 05/09/2005	UIRLOOK 760/1	107.50				107.50	(0.01)		(0.01)
Total Eye Care Plan Of America - Region 1			107.50	0.00	0.00	0.00	107.50	(0.01)	0.00	(0.01)
Report Total			107.50	0.00	0.00	0.00	107.50	(0.01)	0.00	(0.01)

Service Listing

The Service Listing report lists all services and includes names descriptions, CPT codes, fees, costs, and gross profit percentages. OfficeMate suggests creating this report on demand.

- ❖ To create the Service Listing report, select the **Inactive only** check box if you only want to display inactive services.

05/30/2006 1:05:01PM		Services Listing				
<u>Name</u>	<u>Description</u>	<u>CPT</u>	<u>Fee</u>	<u>Cost</u>	<u>GP %</u>	<u>Active</u>
11441	Excision, Benign 0.6-1.0 CM	11441				True
11442	Excision, Benign 1.1-2.0 CM	11442				True
11443	Excision, Benign 2.1-3.0 CM	11443				True
11444	Excision, Benign 3.1-4.0 CM	11444				True
11640	Excision, Malignant 0.5 CM-Less	11640				True
11641	Excision, Malignant 0.6-1.0 CM	11641				True
11642	Excision, Malignant 1.1-2.0 CM	11642				True
11643	Excision, Malignant 2.1-3.0 CM	11643	150.00	100.00	33.3	True
11643	Excision, Malignant 2.1-3.0 CM	11643	150.00	100.00	33.3	True
11644	Excision, Malignant 3.1-4.0 CM	11644				True
11646	Excision, Malignant Over 4.0 CM	11646				True
11780	Eye Exam + Refraction	11780				True
12001	Eye Exam / Wears Glasses	12001				True
12011	Repair Wound, Simple 2.5 CM-Less	12011				True
12013	Repair Wound, Simple 2.6-5.0 CM	12013				True
12051	Repair Wound, Inter. 2.5 CM-Less	12051				True
12052	Repair Wound, Inter. 2.6-5.0 CM	12052				True
12053	Repair Wound, Inter. 5.1-7.5 CM	12053				True

Statements

The Statements report prints statements for all patients with outstanding balances. Select to print the information on a 30, 60, or 90+ day delinquent statement. This report lists all charges that are still open. A payment coupon is printed on the last page. OfficeMate suggests creating this report on demand.

To create the Statements report, follow the instructions below:

- 1 Click in the **Patient Name** text box to find and select a patient.
- 2 Type the **Last Name** selection parameters.
- 3 Select the **By Family** check box if you want to sort the report by family.
- 4 Set the **Period end** date parameter.
- 5 Type the dollar amount at which you want to begin displaying balances in the **Display if balance** text box.
- 6 Type the number of days for which you want to display details in the **Display details (# days)** text box.

Note

The Statements report can display up to 3650 days of details. If you do not want to display details, type 0.

- 7 Select the **Print Ins charges/payment** check box if you want to print insurance and patient payment and charge responsibilities.

- 8 Select the **Print reason for Ins denial** check box if you want to print the reason for an insurance denial.

Note

Select the Print reason for Ins denial check box if you recorded a transfer from an insurance carrier to a patient.

- 9 Select the appropriate **Patient Name** and **ZIP Code** sort order options.

OfficeMate Software Solutions 15375 Barranca Pkwy, Bldg L Irvine, CA 92618		Page: 1	
Statement of Account			
To: Henry A. Mitchell 663 Tressle Way Lake Forest, CA 92630		Date Printed	04/22/2005
		Period Ending	04/22/2005
		Provider Name	Michael Miller, O.D.
		Phone Number	949 727 7080
		License	4646-89
		Tax ID	66-456872
		TPA Number	345-454-234

Fee Slip No	Transaction		Description	Fee Amount	-----Responsible Party-----	
	Date	Qty			Insurance	Patient
Henry A. Mitchell						
2	09/20/1998	1	Comprehensive Exam - Est	68.00	54.40	13.60
	05/19/1999		Late Charge	5.00		5.00
14	05/19/1999	1	Exam - Comp New Patient	68.00	54.40	13.60
	05/19/1999	1	Acculux 225	201.79		201.79
	05/21/1999		Finance Charge			2.60
	05/21/1999		Late Charge	5.00		5.00
20	05/21/1999	1	Comprehensive Exam - Est	68.00	54.40	13.60
	05/21/1999	1	Multipack Acuvue Lenses	32.00	25.60	6.40
24	05/21/1999	1	Comprehensive Exam - Est	75.00		75.00
26	05/22/1999	1	Comprehensive Exam - Est	68.00	54.40	13.60
	05/22/1999	1	F74	237.40	189.92	47.48
	05/22/1999	1	Varilux Progressive	199.34	159.47	39.87
	06/02/1999	1	Anti-reflective Coating	50.00		50.00
	06/02/1999	1	Adjustment: Product Return			(50.00)
28	06/02/1999	1	Comprehensive Exam - Est	75.00		75.00
	06/02/1999	1	Multipack Acuvue Lenses	32.00		32.00
	08/29/1999		Late Charge	3.00		3.00

Statements report created after typing a positive number in the Display details (# days) selection criteria item box and selecting the Print Ins charges/payment selection criteria item.

OfficeMate Software Solutions
15375 Barranca Pkwy, Bldg L
Irvine, CA 92618

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Statement of Account

To: Harper Cole
990 Pleasant Valley Run
Laguna Niguel, CA 92653

Date Printed 04/21/2005
Period Ending 04/21/2005
Provider Name Michael Miller, O.D.
Phone Number 949 727 7080
License 4546-89
Tax ID 66-456872
TPA Number 345-454-234

Fee Slip No	Transaction Date	Qty	Description	Fee Amount	-----Responsible Party----- Insurance	Patient
Harper Cole						
			Previous Balance thru 04/21/2005		432.00	3,821.79
Total Due:					432.00	3,821.79

Thank you for your confidence and trust.

Patient Aging:	Current	31-60 Days	61-90 Days	91-120 Days	Over 120 Days
	379.32				

Total Due 379.32 **Check #** _____ **Credit Card #** _____ **Code#** _____

Amount Enclosed _____ **Type** _____ **Exp Date** _____ **Signature** _____

Patient/Guarantor Name Harper Cole **Payment Due** 08/21/2002 **Patient #** 10

OfficeMate Software Solutions
15375 Barranca Pkwy
Building L
Irvine, CA 92618

Harper Cole
990 Pleasant Valley Run
Laguna Niguel, CA 92653

Statements report created after typing 0 in the Display details (# days) selection criteria item box.

Stock Status

The Stock Status report lists the stocking status of all product types or a specific product type. OfficeMate suggests creating this report on a yearly basis.

- ❖ To create the Stock Status report, select a product type from the **Product Type** drop-down menu.

05/12/2005 12:15:24PM		Stock Status Report Product Type = Frames						
Product	Product Code	UPC	Size	Color	On Hand	On Order	Cost	Value
Marchon Eyewear, Inc.								
WILLOCK 760/1	679516691691		53,0,140,53,37,5,55,5	GUNMETAL	-1	1	89.95	(89.95)
101 COACH ASTOR	679516719159		50,0,140,50,28,5,52,5	COFFEE	5	0	59.95	299.75
101 COACH ASTOR	679516719173		52,0,140,52,29,5,54,5	COFFEE	3	0	59.95	179.85
101 COACH ASTOR	679516719029		50,0,140,50,28,5,52,5	GUNMETAL	5	0	59.95	299.75
101 COACH ASTOR	679516719043		52,0,140,52,29,5,54,5	GUNMETAL	4	0	59.95	239.80
101 COACH ASTOR	679516719289		50,0,140,50,28,5,52,5	SAND	5	0	59.95	299.75
101 COACH ASTOR	679516719302		52,0,140,52,29,5,54,5	SAND	8	2	59.95	479.60
CINDERELLA	679516757151		38,0,110,37,24,37,5	MOCHA	1	0	44.95	44.95
CINDERELLA	679516757601		38,0,110,37,24,37,5	PINK	1	0	44.95	44.95
CINDERELLA	679516757625		40,0,115,39,26,39,5	PINK	1	0	44.95	44.95
CINDERELLA	679516757649		42,0,115,41,28,41,5	PINK	1	0	44.95	44.95
					33	3		1,888.35
					33	3		1,888.35

Top Selling Frames - Detail

The Top Selling Frames - Detail report lists the top selling frames. This report includes names, colors, sizes, numbers sold during the period, usual fees, actual fees charged, costs, profits, and gross profits. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Top Selling Frames - Detail report, set the fee slip date parameters and select a manufacturer from the **Manufacturer** drop-down menu.

05/12/2005 12:18:42PM										
Top Selling Frames - Detail										
Fee Slip Date >= 04/12/2005										
Fee Slip Date <= 05/12/2005										
Designer	Name	Color	Size		Fee	Actual	Cost	Profit	GP%	Units
Marchon Eyewear, Inc.										
Coach	101 Coach Astor	BLACK	52	140	178.99	178.99	59.95	119.04	66.51	1
Marchon® Collectio	\irlock 760/1	GUNMETAL	53	140	214.99	214.99	89.95	125.04	58.16	1
Total for Marchon Eyewear, Inc.										2
Grand Total					393.98	393.98	149.90	244.08		2

Top Selling Frames - Summary

The Top Selling Frames - Summary report lists the top ten selling frames. This report includes names, numbers sold during the period, usual fees, actual fees charged, costs, profits, and gross profits. OfficeMate suggests creating this report on a monthly basis.

- ❖ To create the Top Selling Frames - Summary report, set the fee slip date parameters and select a manufacturer from the **Manufacturer** drop-down menu.

05/12/2005 12:22:11PM								
Top Selling Frames - Summary								
Fee Slip Date >= 04/12/2005								
Fee Slip Date <= 05/12/2005								
Designer	Name		Fee	Actual	Cost	Profit	GP%	Units
Marchon Eyewear, Inc.								
Coach	101 Coach Astor		178.99	178.99	59.95	119.04	66.51	1
Marchon® Collection	\irlock 760/1		214.99	214.99	89.95	125.04	58.16	1
Total for: Marchon Eyewear, Inc.								2
Grand Total			393.98	393.98	149.90	244.08		2

Transferred Unapplied Ins. Amount

The Transferred Unapplied Ins. Amount report displays insurance unapplied amounts and patient credit transfers. You can transfer any insurance unapplied amount to a

patient that belongs to that insurance. OfficeMate suggests creating this report on demand.

- ❖ To create the Transferred Unapplied Ins. Amount report, set the transfer date parameters and select an insurance carrier from the **Insurance Co.** drop-down menu.

05/12/2005 12:30:40PM

Transferred Unapplied Insurance Amounts

Transfer Date >= 01/01/2001

Transfer Date <= 05/12/2005

<u>Transfer Date</u>	<u>Patient Name</u>	<u>Ins Dep no</u>	<u>Trans Amount</u>	<u>Recorded By</u>
Medical Eye Services 05/12/2005	Michelle Radmore	16	\$111.00	Franklin Helen

Unapplied Amounts

The Unapplied Amounts report lists patients and insurance companies that have an unapplied credit amount on their account. OfficeMate suggests creating this report on demand.

05/12/2005 2:09:22PM		Patients and Insurance with Unapplied Amounts	
<u>Insurance Co /</u> <u>Patient Name</u>		<u>Unapplied Amount</u>	
Patient			
Carter, Sally		50.00	
Radmore, Michelle		258.94	
Vieqa, Valerie		20.00	
		<hr/>	
		328.94	
		<hr/>	
Insurance			
Eye Care Plan Of America - Region 1		100.00	
Medical Eye Services		111.00	
		<hr/>	
		211.00	
		<hr/>	

Vendor Listing

The Vendor Listing report lists all vendors. This report includes names, addresses, phone numbers, fax numbers, account numbers, and types. OfficeMate suggests creating this report on demand.

- ❖ To create the Vendor Listing report, select a vendor from the **Vendor** drop-down menu and choose appropriate **Vendor** sort order options.

05/12/2005 2:24:56PM		Vendor List	
Name	Alcon 6201 S. Freeway Fort Worth, Texas 76134	Account No	
Contact		Type	Solutions Manufacturer/vendor
Phone 1	800-451-Eyes	Frames?	No
Phone 2		Contact lens?	No
Fax		Blank lens?	No
		Other?	Yes
		Lab?	No
Name	Bausch & Lomb 1400 N. Goodman Street Rochester, New York 14692	Account No	
Contact		Type	Contact Lens Manufacturer/vendor
Phone 1	800-828-9030	Frames?	No
Phone 2		Contact lens?	Yes
Fax		Blank lens?	No
		Other?	Yes
		Lab?	No
Name	Benedict Optical 341 Bennett Lane Lewisville, Texas 75057	Account No	
Contact		Type	Lens Laboratory
Phone 1	800-823-2361	Frames?	No
Phone 2		Contact lens?	No
Fax		Blank lens?	Yes
		Other?	No
		Lab?	Yes

Void Fee Slip Register

The Void Fee Slip Register report lists details from voided fee slips. The details of the report are arranged by the date(s) the fee slips were voided and do not reflect the original sale date(s). OfficeMate suggests creating this report on demand.

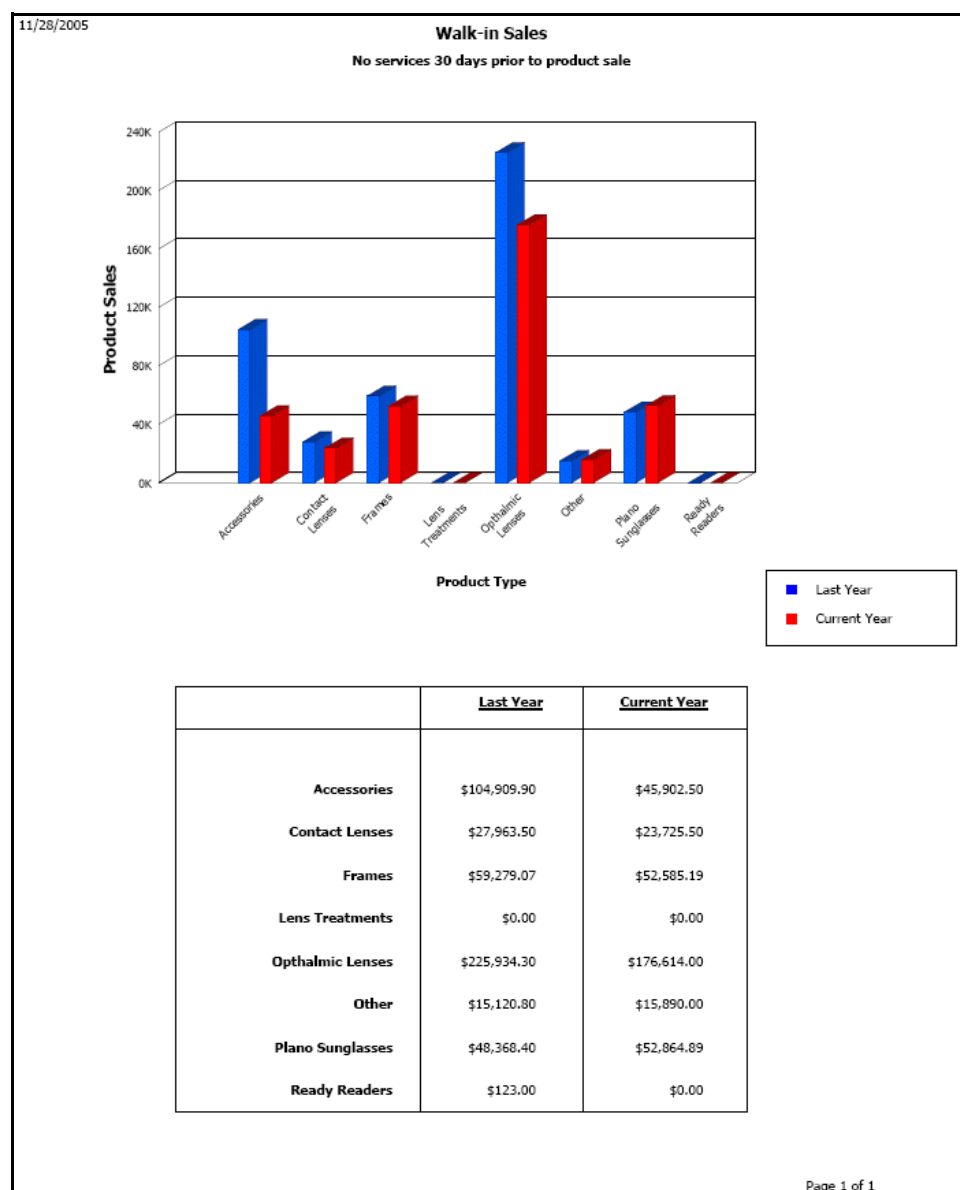
- ❖ To create the Void Fee Slip Register report, set the date voided parameters.

05/12/2005 2:27:53PM		Voided Fee Slip Register		
		Date Voided >= 01/01/2001		
		Date Voided <= 05/11/2005		
Fee Slip	Fee Slip Date	Patient	Date Voided	Amount
53	03/09/2000	Viega, Valerie	06/08/2001	0.00
88	05/03/2005	Carter, Sally	05/05/2005	120.00

Walk-in Sales

The Walk-in Sales report displays a count of retail sales only. A sale is a retail sale if there were no services for the patient within a given number of days.

- ❖ To create the Walk-in Sales report, type the number of days for which no service was provided in the **No Services for (# days)** text box and select a time period from the **Period for Comparison** drop-down menu.



CHAPTER 14

Using the Task Manager & OfficeMate Information Center

Center

In this chapter:

- [Using the Task Manager, 473](#)
- [Using the OfficeMate Information Center, 477](#)

Using the Task Manager

You can create, track, and assign tasks to specific providers and staff members in OfficeMate. If you are an ExamWRITER user and you record an exam with a lab order and schedule an examination, the scheduled orders are displayed in the Patient Open Charges window in OfficeMate, which you can then post to the Task Manager. This section tells you how to use the Task Manager, including how

- [To open the Task Manager, 474](#)
- [To add new tasks, 474](#)
- [To update tasks, 475](#)
- [To change the date of tasks, 475](#)
- [To record completed tasks, 475](#)
- [To record open tasks, 476](#)
- [To delete tasks, 476](#)

► To open the Task Manager

Open the Task Manager window using one of the following methods:

- Click the **QL/To Do** icon and select **To Do List**.
- Click **Tools** on the main window toolbar and select **Task List**.

The **Task Manager** window opens.

Note

Click **Refresh** to refresh the Task Manager.

► To add new tasks

- 1 Open the Task Manager window. For more information on opening the Task Manager, go to [To open the Task Manager on page 474](#).
- 2 Click **New Task**.
The **New Task** window opens.
- 3 Select a provider or staff member to whom you want to assign and send the task from the **Send To** drop-down menu.
- 4 Type or select a date for the task from the **Action date** field.
- 5 Type a task in the **Subject** text box.
- 6 Select a priority from the **Priority** drop-down menu.
- 7 Select the status (open or completed) of the task from the **Task Status Group** drop-down menu.
- 8 Type notes in the **Notes** text box, if necessary.

The screenshot shows a 'New Task' dialog box with the following fields and values:

- From:** Carrie, Daniels Marie
- Send To:** David O.D., Roseanna M
- Action date:** 08/04/2009
- Subject:** Renew OfficeMate ASMA
- Priority:** High
- Task Status Group:** Open
- Notes:** (empty text box)

Buttons at the bottom: Save, Clear, Exit. A 'Forward' button is also present next to the 'Send To' field.

- 9 Click **Save**.

After a task is assigned to a specific provider or staff member, the task is visible in the Task Manager window when the provider or staff member logs into OfficeMate.

► To update tasks

- 1 Open the Task Manager window. For more information on opening the Task Manager, go to [To open the Task Manager on page 474](#).
- 2 Select a task and click **Edit**.
- 3 Click **Forward** to forward the task to a new user, if desired.
The From field displays the current user and the Send To field is blank.
- 4 Edit the task using steps 4–9 in [To add new tasks on page 474](#).

► To change the date of tasks

- 1 Open the Task Manager window. For more information on opening the Task Manager, go to [To open the Task Manager on page 474](#).
- 2 Select a task.
- 3 Click **Change Date**.
- 4 Select a new date from the calendar and click **OK**.

► To record completed tasks

- 1 Open the Task Manager window. For more information on opening the Task Manager, go to [To open the Task Manager on page 474](#).
- 2 Ensure that you are viewing the Open tasks.
- 3 Select an open task in the table.
- 4 Click **Mark as Completed**.

The screenshot shows the 'Task Manager' window titled 'Tasks for: Carrie, Daniels'. On the left, the 'Task Status Group' has 'Open' selected. The main table lists tasks with columns: Subject, Notes, Action Date, Status, and Priority. Two tasks are visible:

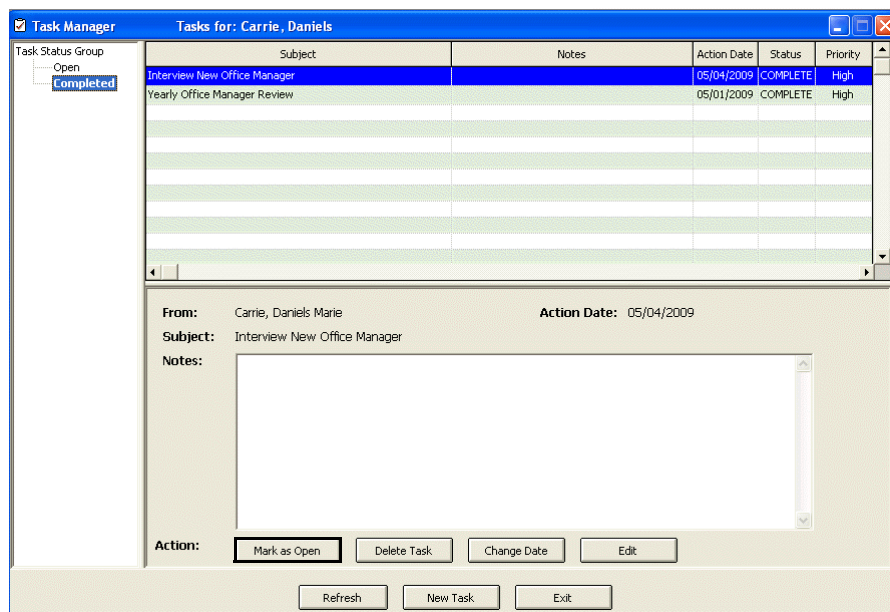
Subject	Notes	Action Date	Status	Priority
Schedule ~ 04/30/2010: Examination: OS: Contact Lens Disp	For patient: Smith, Mary M ID: 6749	04/30/2009	OVERDUE	High
Renew OfficeMate ASMA	Don't forget to renew ASMA!	04/24/2009	OVERDUE	High

The first task is selected. Below the table, the 'Action' section shows the 'Mark as Completed' button highlighted. Other buttons include 'Delete Task', 'Change Date', 'Edit', 'Refresh', 'New Task', and 'Exit'. The 'From' field is empty, and the 'Action Date' is 04/30/2009. The 'Subject' and 'Notes' fields are populated with the task details.

The task is moved from the Open tasks table to the Completed tasks table.

► To record open tasks

- 1 Open the Task Manager window. For more information on opening the Task Manager, go to [To open the Task Manager on page 474](#).
- 2 Ensure that you are viewing the Completed tasks.
- 3 Select a completed task in the table.
- 4 Click **Mark as Open**.



The task is moved from the Completed tasks table to the Open tasks table.

► To delete tasks

- 1 Open the Task Manager window. For more information on opening the Task Manager, go to [To open the Task Manager on page 474](#).
 - 2 Select a task.
 - 3 Click **Delete Task**.
- The **Confirm Delete** window opens.
- 4 Click **Yes**.

Using the OfficeMate Information Center

You can use the OfficeMate Information Center to efficiently move patient information from one window to another window in OfficeMate. You can also view patient demographic (including the average dollar amount the patient spent in your office per visit), ledger activity, appointment history, lab order, Rx history, patient recall, family member, exam history, diagnosis list, procedures performed, and medication information.

Patients are added to the OfficeMate Information Center each time you use their records and when their appointments are scheduled on the current day. The OfficeMate Information Center can be very beneficial to network users because every time a patient's record is accessed at one computer, it is added to the OfficeMate Information Center and can be accessed at other computers in the network. This section tells you how to use the OfficeMate Information Center, including how

- [To open the OfficeMate Information Center, 478](#)
- [To add patients to the OfficeMate Information Center, 479](#)
- [To use the OfficeMate Information Center, 480](#)

For more information on using the OfficeMate Information Center, see the "OSSU 202 Checking in Patients" iTrain and the OSSU 100-2, "Setting Up Business Names, Preferences, the Appointment Scheduler, & the Quick List," training course.

► To open the OfficeMate Information Center

Open the Patient OfficeMate Information Center window using one of the following methods:

- Click the **QL/To Do** icon and select **Quick List**.
- Click **Tasks** on the main window toolbar and select **Quick List**.

The **OfficeMate Information Center** window opens.

Notes

- If you want the Patient OfficeMate Information Center to display automatically when you open OfficeMate, select the **Yes** radio button next to the Display quick list on startup Other system preference. For more information on modifying Other OfficeMate preferences, go to [To define and change other preferences on page 69](#).
- The HIPAA column and box is color coded to quickly notify you of the status of the patient's HIPAA documents. If the column is red, the patient did not sign the HIPAA documents; if the column is green, the patient read and understood the HIPAA documents; and if the column is yellow, the patient read and modified the HIPAA documents.
- The RFR column and box is color coded to quickly notify you of the patients' identify safeguard information. For more information on the RFR column and box, go to [To record financial information on page 94](#).
- To sort the list by patient, phone number, or appointment, click on the column headings.
- When a patient's exam has been closed or finalized, the Room column automatically displays the text "CLOSED."
- The Prov column displays the provider's initials and provider ID (which is also displayed in the ID # box next to the provider's name on the Provider/Staff tab on the Business Names window).
- Although the OfficeMate Information Center automatically refreshes, you can click **Refresh QL** to refresh the OfficeMate Information Center manually.
- To display patients with appointments only, select the **Appts Only** check box and click **Refresh**.
- To display patients who are assigned to all providers, select the **All Providers** check box. To display patients who are assigned only to the provider logged into OfficeMate, deselect the **All Providers** check box. The **All Providers** check box is *only* active when a provider is logged into OfficeMate. Staff members logged into OfficeMate will see all providers listed in the OfficeMate Information Center.

- To add patients to the OfficeMate Information Center
- 1 Click the **QL/To Do** icon and select **OfficeMate Information Center**.
The **Patient OfficeMate Information Center** window opens.
- 2 Click **F2 Find**.

The screenshot displays the 'OfficeMate Information Center' window. At the top, there's a search bar with 'F2 Find' and 'Demographics' tabs. Below this, patient information for Mary Smith is shown, including her address (89 South Bell, Irvine, CA 92615), phone number ((456) 789-4568), and email (marysmith@smith.com). A 'HIPAA' section is visible with a 'RFR' button. The 'Ledger Activity' section shows a table with columns for Date, Time, Provider, Service, Pre-appt, Cancel, Confirm, Left msg, No answer, and No show. The 'Appointment History' section shows a table with columns for Date, Time, Provider, Service, Pre-appt, Cancel, Confirm, Left msg, No answer, and No show. The 'Lab Orders' section shows a table with columns for Type, Rx, Exam Date, Promised Date, Tray Number, Lab, Order Status, Fix Date, Order Date, Received, Fix by, Order by, and Received by.

Type	Rx	Exam Date	Promised Date	Tray Number	Lab	Order Status	Fix Date	Order Date	Received	Fix by	Order by	Received by
SPEC	5	04/30/2009					04/30/2009			Carr, Daniels		
SPEC	1	04/24/2009					04/24/2009			Carr, Daniels		
SPEC	2	04/24/2009					04/24/2009			Carr, Daniels		
SPEC	3	04/24/2009					04/24/2009			Carr, Daniels		
SPEC	4	04/24/2009					04/24/2009			Carr, Daniels		

The **Add New Patient Record** window opens.

- 3 Use the instructions in [Creating & Opening Patient Records on page 79](#) to add a new patient record or open an existing patient's record.

The patient appears in the OfficeMate Information Center after you click **OK** on the Patient Demographic window.

► To use the OfficeMate Information Center

Use the OfficeMate Information Center in the following ways:

- Click on a patient's name in the Patient OfficeMate Information Center window and drag and drop the patient on one of the OfficeMate icons to open an OfficeMate window for the patient.
- Right-click on a patient's name and select an appropriate option to open an OfficeMate window for the patient.
- To view a patient's information in the OfficeMate Information Center, double-click the patient's name in the Quick List.
- To open a patient's Patient window, double-click the patient's name in the Quick List and click **Demographics**.
- To search for and view demographic information for a patient who is not listed on the Quick List, click **F2 Find**.
- To update a patient's photo, double-click the patient's name in the Quick List and click **Update Patient Photo**.
- To open a patient's ledger, double-click the patient's name in the Quick List and double-click in one of the **Ledger Activity** boxes.
- To open a patient's lab order, double-click the patient's name in the Quick List and then double-click on a lab order in the **Lab Orders** table.
- To open a patient's recall information, double-click the patient's name in the Quick List and then double-click on a recall in the **Patient Recalls** table.
- Right-click on a patient's name and select **Room** to open the Patient Room window, select the room in the office where the patient is currently located, and click **Save** to denote the patient's location on the Patient OfficeMate Information Center.

Note

To maintain a list of office room locations, go to [To modify list box selections on page 34](#) and modify the Room Entry Field Name.

CHAPTER 15

Printing Correspondences

In this chapter:

- Printing Welcome & Thank You Correspondences, 482
- Printing Referral Correspondences, 483
- Printing Recall Correspondences, 485
- Printing Birthday Correspondences, 487
- Printing Appointment Reminders, 489
- Printing Delinquent Correspondences, 491
- Printing Service Agreement Renewals, 492

For more information on processing correspondences, see the “[OSSU 503 Processing Documents](#)” iTrain and the OSSU 500-1, “[Creating Reports & Processing Documents](#),” training course.

Notes

- Print letters and lists using 8½” x 11” paper stock or office letterhead.
- Print labels using Avery 5260 compatible white rectangular labels. You can purchase these labels from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com.
- Print postcards using postcard stock with four cards on 8½” x 11” sheets. You can purchase postcards from Medical Arts Press at 1.800.328.2179 or www.medicalartspress.com or from Marchon Eyewear at 1.800.645.1300.
- For information on maintaining correspondences, go to [Maintaining Documents](#) on page 495.

Printing Welcome & Thank You Correspondences

- 1 Click **Tasks** on the main window toolbar, select **Correspondence**, and then select **Welcome**.

The **Welcome/Thank You Processing** window opens.

Notes

- If you have a default welcome letter, the letter and new patients are automatically added to your welcome correspondence list. To send a different welcome letter, go to [To select letters to send to a patient on page 100](#). To modify your default letter preferences, go to [To define and change one-click document preferences on page 70](#).
- Click **History** to view the welcome correspondence printing history.
- Click **Clear All** to clear all patients from the welcome correspondence list.

- 2 If you want to print labels and lists in addition to the letters, select the **Labels** and **Listing** Additional Printing check boxes.
- 3 Select the **Last Name** or **ZIP Code** Order By radio buttons to sort the documents that you are printing by last name or ZIP code.

Print	Patient Name	Print Letter/Postcard
<input checked="" type="checkbox"/>	Ahle, Anna	Welcome New Patient
<input checked="" type="checkbox"/>	Ahle, Anna	Welcome New Patient
<input checked="" type="checkbox"/>	Danda, Abdul	Welcome New Patient
<input checked="" type="checkbox"/>	Danda, Abdul	Welcome New Patient
<input checked="" type="checkbox"/>	Oberhauser, Carrie	Welcome New Patient

- 4 Select or deselect patients by clicking the red check box in the **Print** column.

Note

You can also click **Select All** to select all patients or **Unselect All** to deselect all patients.

- 5 If you do not want to print letters or post cards, select the **Do Not Print Letters/Postcards** check box.
- 6 If you need to setup your printer, click **Printer Setup** to open the Print Setup window. For more information on setting up your printer, go to [Setting Up the Printer on page 31](#).

Printing Referral Correspondences

- 7 Click **Print** to print the correspondences.

If you are printing labels or lists, the **Report Printer Selection** window opens. Click one of the following buttons:

- **Print** to print the welcome correspondences for the selected patients.
- **Skip** to skip the current print selection and go to the next print selection.
- **Test Print** to print a sample welcome correspondence.
- **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

The **Correspondence Printing Window** opens.

- 8 Click **Yes** to clear all of the patients from the Welcome/Thank You Processing window and update the correspondence history.

- 1 Click **Tasks** on the main window toolbar, select **Correspondence**, and then select **Referrals**.

The **Referrals Processing** window opens.

Notes

- Patients with referrals are automatically added to your referrals correspondence list.
- To send a different type of referral letter, go to [To select letters to send to a patient on page 100](#).
- Click **History** to view the referral correspondence printing history.
- Click **Clear All** to clear all patients from the referral correspondence list.

- 2 If you want to print labels and lists in addition to the letters, select the **Labels** and **Listing** Additional Printing check boxes.

- 3 Select the **Last Name** or **ZIP Code** Order By radio buttons to sort the documents that you are printing by last name or ZIP code.

- 4 Select or deselect patients by clicking the red check box in the **Print** column.

Note

You can also click **Select All** to select all patients or **Unselect All** to deselect all patients.

- 5 If you do not want to print letters or post cards, select the **Do Not Print Letters/Postcards** check box.
- 6 If you need to setup your printer, click **Printer Setup** to open the Print Setup window. For more information on setting up your printer, go to [Setting Up the Printer on page 31](#).
- 7 Click **Print** to print the correspondences.

If you are printing labels or lists, the **Report Printer Selection** window opens. Click one of the following buttons:

- **Print** to print the referral correspondences for the selected patients.
- **Skip** to skip the current print selection and go to the next print selection.
- **Test Print** to print a sample referral correspondence.
- **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

The **Correspondence Printing Window** opens.

- 8 Click **Yes** to clear all of the patients from the Referrals Processing window and update the correspondence history.

Printing Recall Correspondences

Note

For more information on creating and printing recalls, go to [Recalling Patients on page 173](#).

- 1 Click **Tasks** on the main window toolbar, select **Correspondence**, and then select **Recall**.

The **Process Recalls** window opens.

Note

Click **History** to view the recall correspondence printing history.

- 2 Type or select dates in the Selection Range **From** and **To** boxes and click **Start Selection** to find patients in the selected date range to whom you can send recall correspondences.

A list of patients meeting your selection criteria is displayed.

- 3 If you want to print labels and lists in addition to the letters, select the **Labels** and **Listing** Additional Printing check boxes.

- 4 Select the **Last Name** or **ZIP Code** Order By radio buttons to sort the documents that you are printing by last name or ZIP code.

Process Recalls

From: 05/27/2004 To: 05/27/2005 Order By: ☒ Last Name ☐ ZIP Code

Selection Range: 05/27/2004 to 05/27/2005

Additional Printing: ☒ Labels ☐ Listing

Select All Unselect All

Print	Patient Name	Print Letter/Postcard
<input checked="" type="checkbox"/>	Crawford, Justin	1 Year - Postcard 01/08/2005
<input checked="" type="checkbox"/>	Crawford, Justin	1 Year - Adult 03/08/2005
<input checked="" type="checkbox"/>	Crawford, Justin	1 Yr - No Resp - Adult 04/08/2005
<input checked="" type="checkbox"/>	Crawford, Justin	Letter/Postcard not assigned 07/16/2004
<input checked="" type="checkbox"/>	Davis, Steven	Letter/Postcard not assigned 06/30/2004
<input checked="" type="checkbox"/>	Davis, Steven	Letter/Postcard not assigned 08/30/2004
<input checked="" type="checkbox"/>	Mitchell, Henry	2 Years - No Resp- Adult 08/21/2004
<input checked="" type="checkbox"/>	Mitchell, Henry	2 Years - No Resp- Adult 02/21/2005
<input checked="" type="checkbox"/>	Radmore, Michelle	1 Year - Postcard 06/30/2004
<input checked="" type="checkbox"/>	Radmore, Michelle	1 Year - Adult 08/30/2004
<input checked="" type="checkbox"/>	Radmore, Michelle	1 Yr - No Resp - Adult 09/30/2004

☐ Do Not Print Letters / Postcards Total Selected: 16

☒ Select all names

Start Selection Print Cancel History Printer Setup

- 5 Select or deselect patients by clicking the red check box in the **Print** column.

Note

You can also click **Select All** to select all patients or **Unselect All** to deselect all patients.

- 6 If you do not want to print letters or post cards, select the **Do Not Print Letters/Postcards** check box.
- 7 Select the **Select all names** check box if you want to print recall correspondence for all of the patients in the date selection range.

OR

Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print recall correspondence for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print recall correspondence for patients with last names that begin with G–Z.

- 8 If you need to setup your printer, click **Printer Setup** to open the Print Setup window. For more information on setting up your printer, go to [Setting Up the Printer on page 31](#).

- 9 Click **Print** to print the correspondences.

If you are printing labels or lists, the **Report Printer Selection** window opens. Click one of the following buttons:

- **Print** to print the recall correspondences for the selected patients.
- **Skip** to skip the current print selection and go to the next print selection.
- **Test Print** to print a sample recall correspondence.
- **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

The **Correspondence Printing Window** opens.

- 10 Click **Yes** to clear all of the patients from the Process Recalls window and update the correspondence history.

Printing Birthday Correspondences

Note You must have patients' dates of birth recorded in their records in order to print birthday correspondences.

- 1 Click **Tasks** on the main window toolbar, select **Correspondence**, and then select **Birthday**.

The **Process Birthday Correspondence** window opens.

Note Click **History** to view the birthday correspondence printing history.

- 2 Type or select dates in the Selection Range **From** and **To** boxes and click **Start Selection** to find patients in the selected date range to whom you can send birthday correspondences.

A list of patients meeting your selection criteria is displayed.

- 3 If you want to print labels and lists in addition to the letters, select the **Labels** and **Listing** Additional Printing check boxes.
- 4 Select the **Last Name** or **ZIP Code** Order By radio buttons to sort the documents that you are printing by last name or ZIP code.

Print	Patient Name	Print Letter/Postcard
<input checked="" type="checkbox"/>	Ahle, Anna	Birthday Letter not assigned
<input checked="" type="checkbox"/>	Danda, Abdul	Birthday Letter not assigned
<input checked="" type="checkbox"/>	Mitchell, Henry	Birthday Letter not assigned
<input checked="" type="checkbox"/>	Oberhauser, Carrie	Birthday Letter not assigned
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

- 5 Select or deselect patients by clicking the red check box in the **Print** column.

Note

You can also click **Select All** to select all patients or **Unselect All** to deselect all patients.

- 6 If you do not want to print letters or post cards, select the **Do Not Print Letters/Postcards** check box.
- 7 Select the **Select all names** check box if you want to print birthday correspondence for all of the patients in the date selection range.

OR

Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print birthday correspondence for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print birthday correspondence for patients with last names that begin with G–Z.

- 8 If you need to setup your printer, click **Printer Setup** to open the Print Setup window. For more information on setting up your printer, go to [Setting Up the Printer on page 31](#).

- 9 Click **Print** to print the correspondences.

If you are printing labels or lists, the **Report Printer Selection** window opens. Click one of the following buttons:

- **Print** to print the birthday correspondences for the selected patients.
- **Skip** to skip the current print selection and go to the next print selection.
- **Test Print** to print a sample birthday correspondence.
- **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

The **Correspondence Printing Window** opens.

- 10 Click **Yes** to clear all of the patients from the Process Birthday Correspondence window and update the correspondence history.

Printing Appointment Reminders

Note For information on scheduling appointments, go to [Scheduling, Moving, & Cancelling Appointments on page 193](#).

- 1 Click **Tasks** on the main window toolbar, select **Correspondence**, and then select **Appointments**.

The **Appointment Reminders** window opens.

Note Click **History** to view the appointment correspondence printing history.

- 2 Type or select dates in the Selection Range **From** and **To** boxes and click **Start Selection** to find patients in the selected date range to whom you can send appointment reminders.

A list of patients meeting your selection criteria is displayed.

- 3 If you want to print labels and lists in addition to the letters, select the **Labels** and **Listing** Additional Printing check boxes.
- 4 Select the **Last Name** or **ZIP Code** Order By radio buttons to sort the documents that you are printing by last name or ZIP code.

Appointment Reminders

From: 05/27/2003 To: 05/27/2005

Order By: ☒ Last Name ☐ ZIP Code

Additional Printing: ☐ Labels ☐ Listing

Select All Unselect All

Print	Patient Name	Print Letter/Postcard
<input type="checkbox"/>	Ressler, Margaret	Letter not assigned - App date: 07/16/2003
<input type="checkbox"/>	Crawford, Justin	Letter not assigned - App date: 08/02/2003
<input type="checkbox"/>	Cole, Harper	Letter not assigned - App date: 08/02/2003
<input type="checkbox"/>	Davis, Steven	Letter not assigned - App date: 08/03/2003
<input type="checkbox"/>	Mitchell, Henry	Letter not assigned - App date: 08/03/2003
<input type="checkbox"/>	Cole, Harper	Letter not assigned - App date: 03/11/2005

☐ Do Not Print Letters / Postcards Total Selected: 6

☒ Select all names

Start Selection Print Cancel History Printer Setup

- 5 Select or deselect patients by clicking the red check box in the **Print** column.

Note

You can also click **Select All** to select all patients or **Unselect All** to deselect all patients.

- 6 If you do not want to print letters or post cards, select the **Do Not Print Letters/Postcards** check box.
- 7 Select the **Select all names** check box if you want to print appointment reminders for all of the patients in the date selection range.

OR

Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print appointment reminders for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print appointment reminders for patients with last names that begin with G–Z.

- 8 If you need to setup your printer, click **Printer Setup** to open the Print Setup window. For more information on setting up your printer, go to [Setting Up the Printer on page 31](#).

- 9 Click **Print** to print the correspondences.

If you are printing labels or lists, the **Report Printer Selection** window opens. Click one of the following buttons:

- **Print** to print the appointment reminders for the selected patients.
- **Skip** to skip the current print selection and go to the next print selection.
- **Test Print** to print a sample appointment reminder.
- **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

The **Correspondence Printing Window** opens.

- 10 Click **Yes** to clear all of the patients from the Appointment Reminders window and update the correspondence history.

Printing Delinquent Correspondences

Printing delinquent correspondences prints letters, labels, or lists for all open balances over 31 days.

- 1 Click **Tasks** on the main window toolbar, select **Correspondence**, and then select **Delinquent**.

The **Delinquent Processing** window opens.

Note

- Click **History** to view the delinquent correspondence printing history.

- 2 If you want to print labels and lists in addition to the letters, select the **Labels** and **Listing** Additional Printing check boxes.
- 3 Select the **Last Name** or **ZIP Code** Order By radio buttons to sort the documents that you are printing by last name or ZIP code.

- 4 Select or deselect patients by clicking the red check box in the **Print** column.

Note	You can also click Select All to select all patients or Unselect All to deselect all patients.
-------------	--

- 5 If you do not want to print letters or post cards, select the **Do Not Print Letters/Postcards** check box.
- 6 If you need to setup your printer, click **Printer Setup** to open the Print Setup window. For more information on setting up your printer, go to [Setting Up the Printer on page 31](#).

- 7 Click **Print** to print the correspondences.

If you are printing labels or lists, the **Report Printer Selection** window opens. Click one of the following buttons:

- **Print** to print the delinquent correspondences for the selected patients.
- **Skip** to skip the current print selection and go to the next print selection.
- **Test Print** to print a sample delinquent correspondence.
- **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

The **Correspondence Printing Window** opens.

- 8 Click **Yes** to clear all of the patients from the Delinquent Processing window and update the correspondence history.

Printing Service Agreement Renewals

Note	For information on creating service agreements, to go To create new service agreement renewal plans on page 41 . For information on selecting service agreements for patients, go to To record marketing information on page 91 .
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- 1 Click **Tasks** on the main window toolbar, select **Correspondence**, and then select **Service Agreement**.

The **Service Agreement Renewal Processing** window opens.

Note	Click History to view the service agreement renewal printing history.
-------------	--

- 2 Type or select dates in the Selection Range **From** and **To** boxes and click **Start Selection** to find patients in the selected date range to whom you can send service agreement renewals.

Service Agreement Renewal Processing

Selection Range: From To

Order By: ☒ Last Name ☐ ZIP Code

Additional Printing: ☒ Labels ☐ Listing

Order By: ☒ Last Name ☐ ZIP Code

Print	Patient Name	Print Letter/Postcard

☐ Do Not Print Letters / Postcards Total Selected:

☒ Select all names

A list of patients meeting your selection criteria is displayed.

- 3 If you want to print labels and lists in addition to the letters, select the **Labels** and **Listing** Additional Printing check boxes.
- 4 Select the **Last Name** or **ZIP Code** Order By radio buttons to sort the documents that you are printing by last name or ZIP code.

Service Agreement Renewal Processing

Selection Range: From To

Order By: ☒ Last Name ☐ ZIP Code

Additional Printing: ☒ Labels ☒ Listing

Order By: ☒ Last Name ☐ ZIP Code

Print	Patient Name	Print Letter/Postcard
<input checked="" type="checkbox"/>	Ahle, Anna	Contact Lens Service Agreement 04/27/2006

☐ Do Not Print Letters / Postcards Total Selected:

☒ Select all names

- 5 Select or deselect patients by clicking the red check box in the **Print** column.

Note

You can also click **Select All** to select all patients or **Unselect All** to deselect all patients.

- 6 If you do not want to print letters or post cards, select the **Do Not Print Letters/Postcards** check box.
- 7 Select the **Select all names** check box if you want to print service agreement renewals for all of the patients in the date selection range.

OR

Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print service agreement renewals for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print service agreement renewals for patients with last names that begin with G–Z.

- 8 If you need to setup your printer, click **Printer Setup** to open the Print Setup window. For more information on setting up your printer, go to [Setting Up the Printer on page 31](#).
- 9 Click **Print** to print the correspondences.

If you are printing labels or lists, the **Report Printer Selection** window opens. Click one of the following buttons:

- **Print** to print the service agreement renewals for the selected patients.
- **Skip** to skip the current print selection and go to the next print selection.
- **Test Print** to print a sample service agreement renewal.
- **Printer Setup** to set up the printer. For more information on setting up the printer, see [Setting Up the Printer on page 31](#).

The **Correspondence Printing Window** opens.

- 10 Click **Yes** to clear all of the patients from the Service Agreement Renewal Processing window and update the correspondence history.

CHAPTER 16

Maintaining Documents

In this chapter:

- [Creating & Modifying Letters, 495](#)
- [Creating & Modifying Postcards, 503](#)

For more information on maintaining documents, see the “[OSSU 107 Maintaining Documents](#)” iTrain.

Creating & Modifying Letters

You can create and print letters for appointment reminders, birthday greetings, delinquent notices, exam forms, routing slips, marketing communications, recall notices, referral thank you notes, service agreement renewal notices, welcome greetings, and thank you notes. Letters are organized in folders by subject. This section tells you how to create and modify letters, including how

- [To create letters, 496](#)
- [To merge letters, 497](#)
- [To modify letters, 500](#)
- [To print letters, 501](#)
- [To rename letters, 501](#)
- [To delete letters, 502](#)

Note

All letters are created with the following default specifications:

- Page size: 8.5 inches x 11 inches
- Margins: 1 inch on the left and right sides of the page and 1 inch on the top and bottom sides of the page
- Font: Arial, 12 point
- Tabs: .75 inch tab stop

To modify the page size, margins, and tabs, click **File** on the toolbar while you are working with a letter and select **Page Setup**. Record modifications in the Page Setup window and click **OK**.

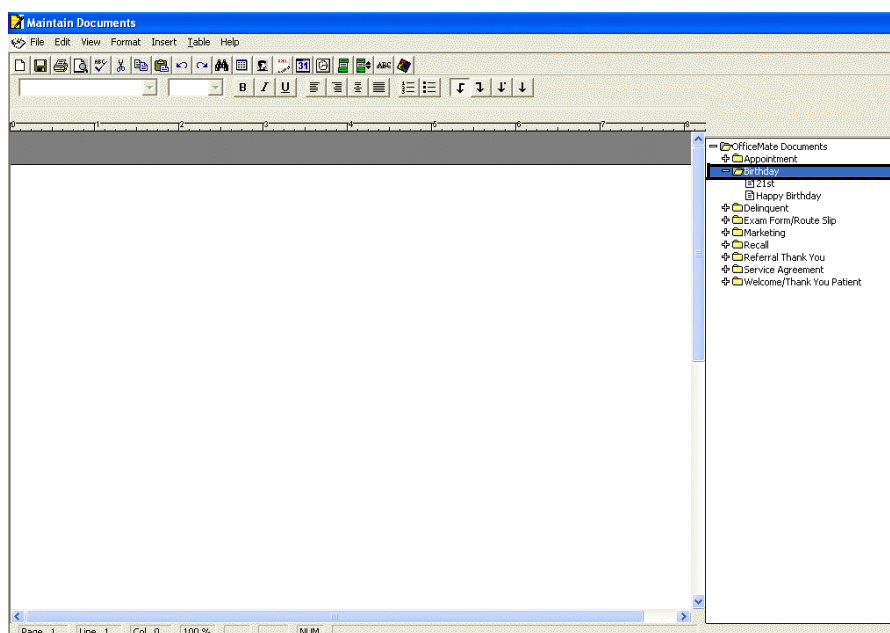
To modify the font style and size, click the icons, select new options from the font style and size drop-down menus, or click **Format** on the toolbar and select **Font**. Record modifications in the Font window and click **OK**.

► **To create letters**

- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Maintain Documents**.

The **Maintain Documents** window open.

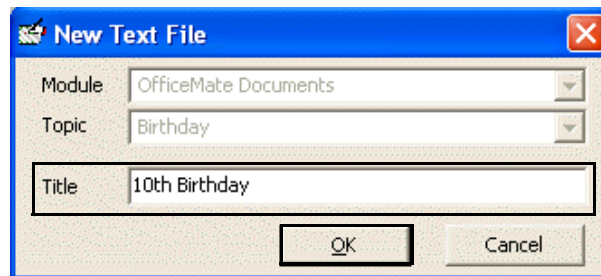
- 2 Click **Setup** and select **Letters**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.
- 4 Click on the name of the folder where you want to store your new letter.



- 5 Click **File** on the Maintain Documents window toolbar and select **New** or left-click on a letter in the folder you selected above and then right-click and select **New**.

The **New Text File** window opens.

- 6 Type a title for the new text file in the **Title** box.
- 7 Click **OK**.



- 8 Type the letter in the word processing window.

Notes

- To format text, click on the icons or click **Format** on the toolbar and select appropriate font, paragraph, and color options.
- To insert page breaks, dates, times, and pictures, click **Insert** on the toolbar and select an appropriate option.
- To insert tables or table objects into your file, click the **Table** icon or click **Table** on the toolbar and select an appropriate option.
- To insert merge fields into your file, click **Insert** on the toolbar and select **Merge Fields**. Select a field from the Merge Fields window and click **Insert**.
- To insert tab stops into your file, click the arrow icons on the toolbar.

- 9 Click **File** on the Maintain Documents window toolbar and select **Save** or click the **Save** icon.

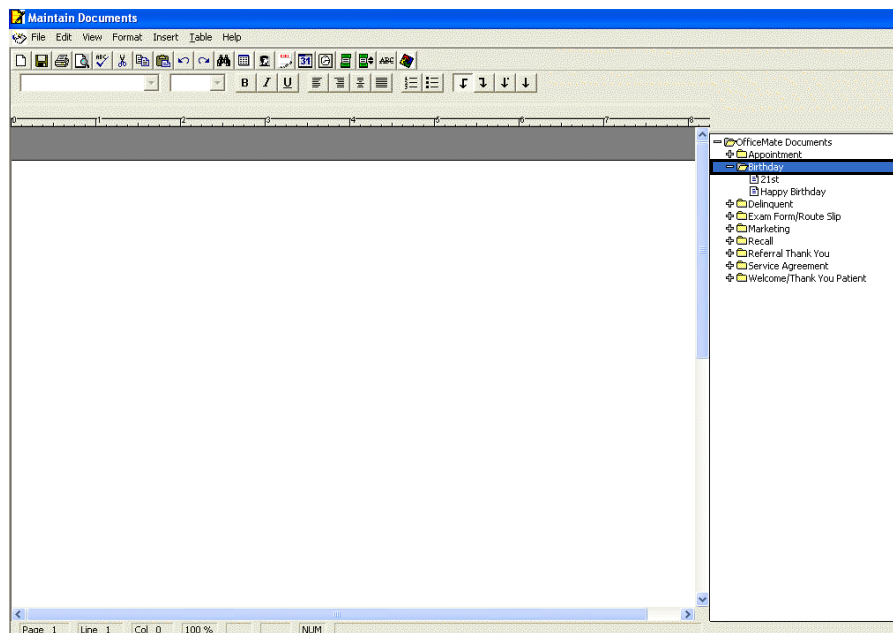
► To merge letters

- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Maintain Documents**.

The **Maintain Documents** window open.

- 2 Click **Setup** and select **Letters**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.

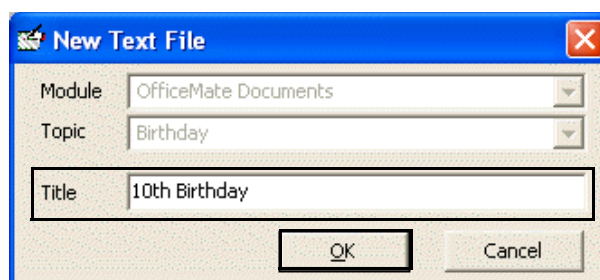
- 4 Click on the name of the folder where you want to store your merged letter.



- 5 Click **File** on the Maintain Documents window toolbar and select **New** or left-click on a letter in the folder you selected above and then right-click and select **New**.

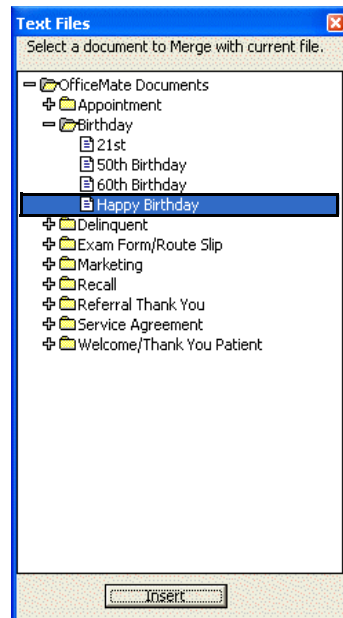
The **New Text File** window opens.

- 6 Type a title for the merged letter in the **Title** box.
- 7 Click **OK**.



- 8 Click **Insert** on the toolbar and select **Existing Document**.

- 9 Click on the name of the letter that you want to merge into the letter that is already open.



- 10 Click **Insert**.
- 11 Edit the text in the word processing window, if necessary.

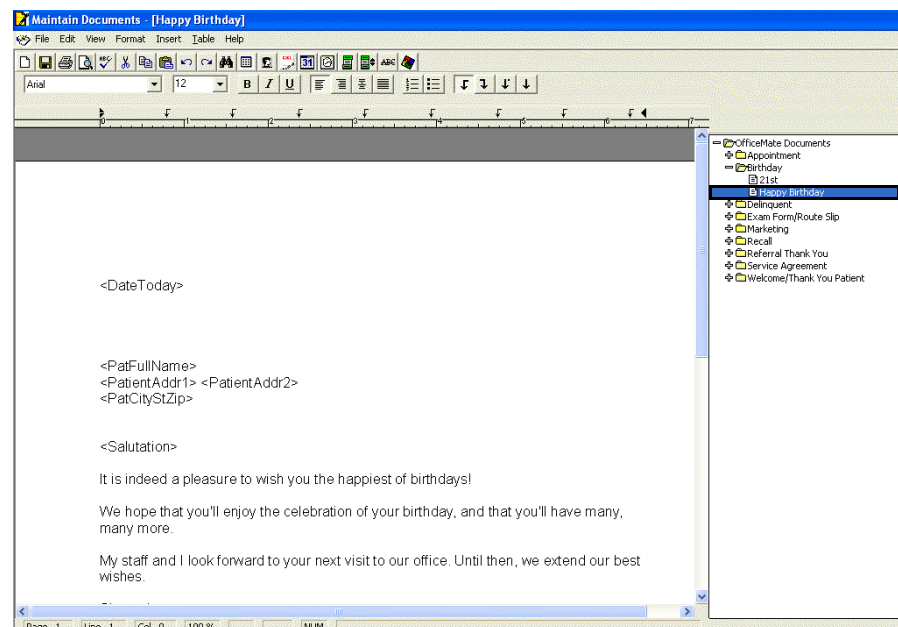
Notes

- To format text, click on the icons or click **Format** on the toolbar and select appropriate font, paragraph, and color options.
- To insert page breaks, dates, times, and pictures, click **Insert** on the toolbar and select an appropriate option.
- To insert tables or table objects into your file, click the **Table** icon or click **Table** on the toolbar and select an appropriate option.
- To insert merge fields into your file, click **Insert** on the toolbar and select **Merge Fields**. Select a field from the Merge Fields window and click **Insert**.
- To insert tab stops into your file, click the arrow icons on the toolbar.

- 12 Click **File** on the Maintain Documents window toolbar and select **Save** or click the **Save** icon to save the file and refresh the list of folders and letters.

► To modify letters

- 1 Click **Tasks** on the main window toolbar and select **Maintain Documents**. The **Maintain Documents** window opens.
- 2 Click **Setup** and select **Letters**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.
- 4 Click on a folder that contains a text file that you want to modify.
- 5 Click on the name of the text file that you want to modify.



The letter opens in the word processing window.

- 6 Edit the text in the word processing window.

Notes

- To format text, click on the icons or click **Format** on the toolbar and select appropriate font, paragraph, and color options.
- To insert page breaks, dates, times, and pictures, click **Insert** on the toolbar and select an appropriate option.
- To insert tables or table objects into your file, click the **Table** icon or click **Table** on the toolbar and select an appropriate option.
- To insert merge fields into your file, click **Insert** on the toolbar and select **Merge Fields**. Select a field from the Merge Fields window and click **Insert**.
- To insert tab stops into your file, click the arrow icons on the toolbar.

- 7 Click **File** on the Maintain Documents window toolbar and select **Save** or click the **Save** icon.

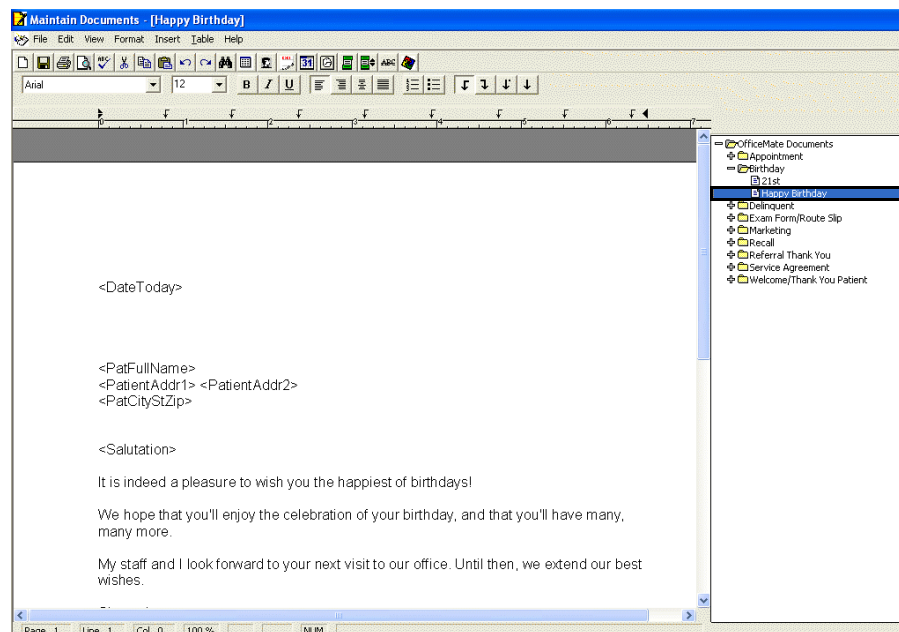
► To print letters

To preview letters that you want to print, create a letter, click **File**, and select **Print Preview**. For more information on creating letters, go to [To create letters on page 496](#).

To print letters that you have created or modified, go to [Printing Correspondences on page 481](#).

► To rename letters

- 1 Click **Tasks** on the main window toolbar and select **Maintain Documents**. The **Maintain Documents** window opens.
- 2 Click **Setup** and select **Letters**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.
- 4 Click on a folder that contains a text file that you want to rename.
- 5 Click on the name of the text file that you want to rename.

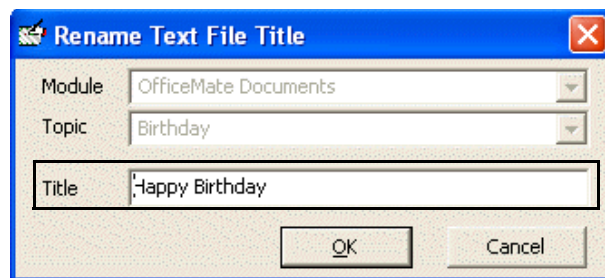


The letter opens in the word processing window.

- 6 Click **File** on the Maintain Documents window toolbar and select **Rename Title** or left-click on a letter in the folder you selected above and then right-click and select **Rename Title**.

The **Rename Text File Title** window opens.

- 7 Type the new text file title in the **Title** text box.

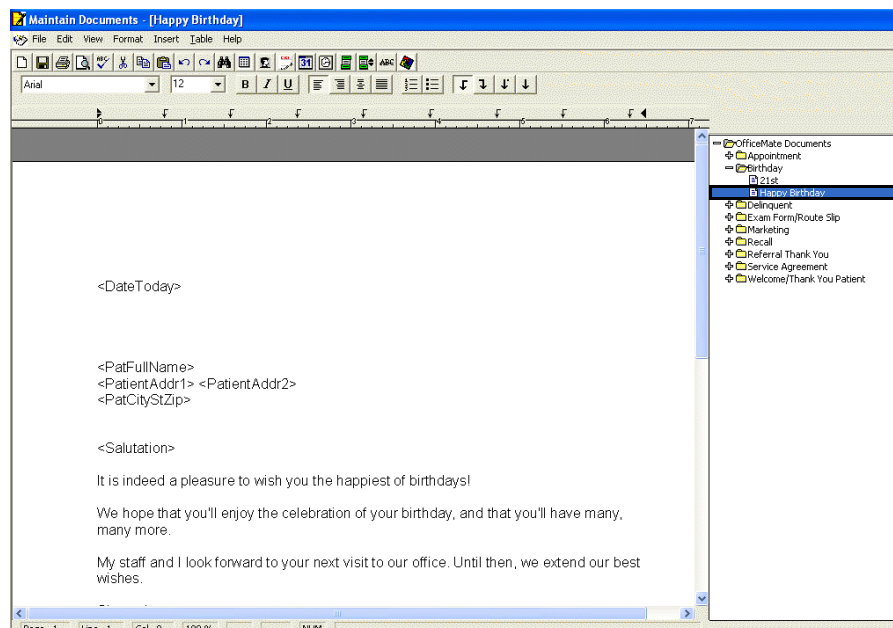


- 8 Click **OK**.

► To delete letters

Note You cannot delete letters that are assigned to a recall mailing schedule.

- 1 Click **Tasks** on the main window toolbar and select **Maintain Documents**. The **Maintain Documents** window opens.
- 2 Click **Setup** and select **Letters**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.
- 4 Click on a folder that contains a text file that you want to delete.
- 5 Click on the name of the text file that you want to delete.



The letter opens in the word processing window.

- 6 Click **File** on the Maintain Documents window toolbar and select **Delete** or left-click on a letter in the folder you selected above and then right-click and select **Delete**.

The **Delete Document Warning** window opens.

Creating & Modifying Postcards

- 7 Click **Yes** to delete the text file.

You can and create and print postcards for appointment reminders, birthday greetings, recall notices, referral thank you notes, service agreement renewal notices, welcome greetings, and thank you notes. Postcards are organized in folders by subject. This section tells you how to create and modify postcards, including how

- To create postcards, 503
- To modify postcards, 505
- To print postcards, 506
- To rename postcards, 507
- To delete postcards, 508

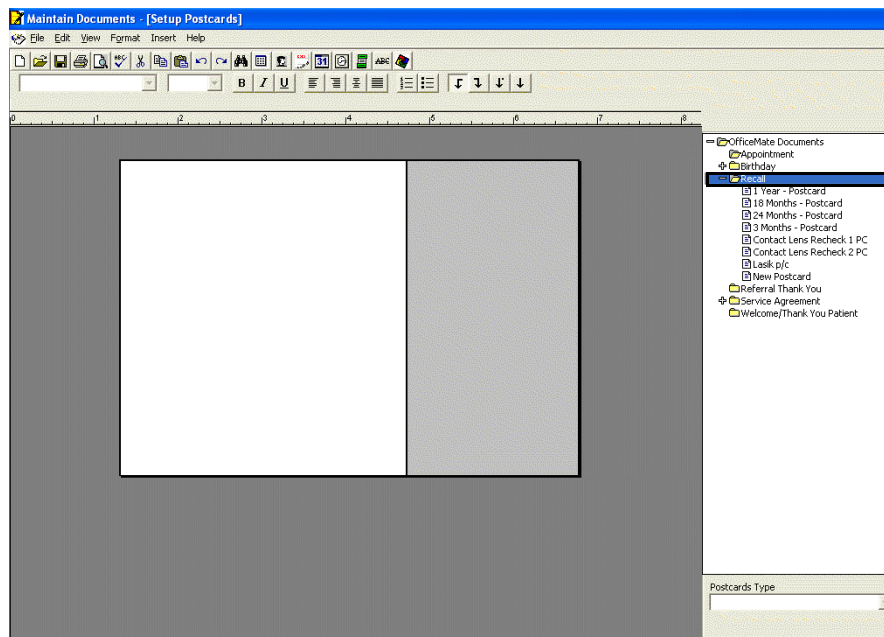
Notes

- To create postcards for mass mailings, go to [Post Card on page 451](#) and create and print the postcards through the Reports, Statements & Graphs window.
- **When you upgrade from OfficeMate version 6.4 and below to OfficeMate version 7.x, any Word postcards that you created in prior versions of OfficeMate will not be available to you in the updated Maintain Documents window.** Instead, you must navigate to your OMATE32\DATA\StyleSheet folder, open the Microsoft Word documents in that folder, copy the text, and then paste the text into the appropriate existing postcard files in the Maintain Documents window (the files exist, but they are empty).

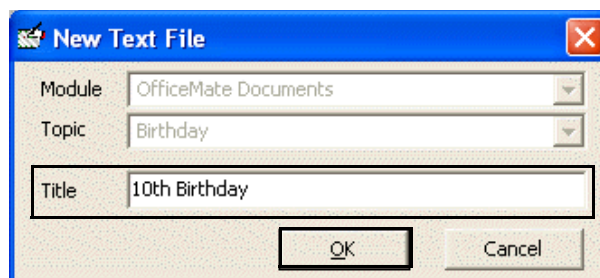
► To create postcards

- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Maintain Documents**.
The **Maintain Documents** window open.
- 2 Click **Setup** and select **Postcards**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.

- 4 Click on the name of the folder where you want to store your new postcard.



- 5 Click **New**.
The **New Text File** window opens.
- 6 Type a title for the new postcard in the **Title** box.
- 7 Click **OK**.



- 8 Select one of six types of postcards from the **Postcards Type** drop-down menu.

- 9 Type the postcard text in the word processing window.

Notes

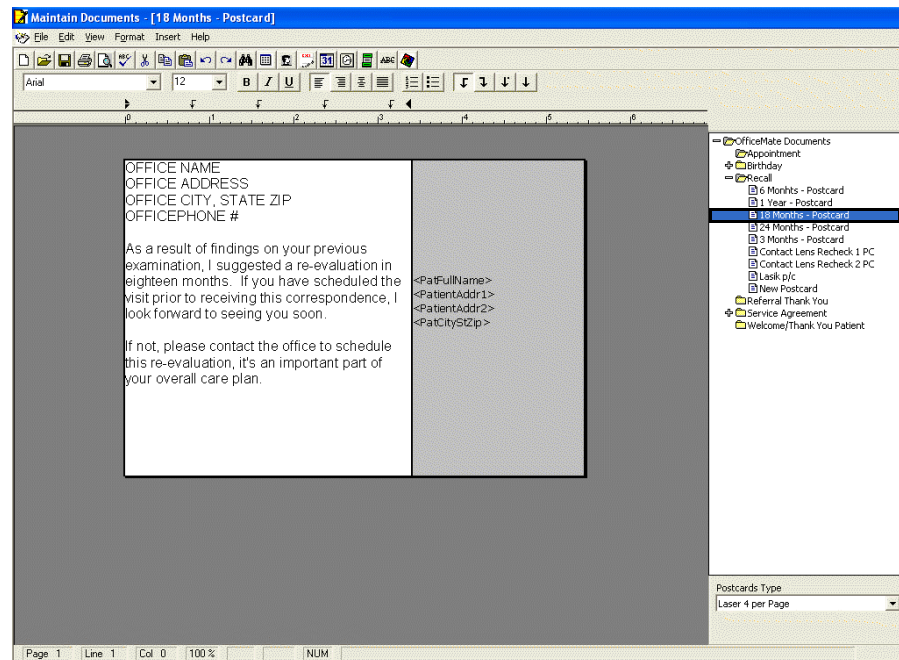
- To format text, click on the icons or click **Format** on the toolbar and select appropriate font, paragraph, and color options.
- To insert dates, times, and pictures, click **Insert** on the toolbar and select an appropriate option.
- To insert merge fields into your file, click **Insert** on the toolbar and select **Merge Fields**. Select a field from the Merge Fields window and click **Insert**.
- To insert tab stops into your file, click the arrow icons on the toolbar.

- 10 If you want to print a test page of the postcard that you just created, click **File** on the Maintain Documents toolbar and select **Print**.
- 11 Click **File** on the Maintain Documents window toolbar and select **Save** or click the **Save** icon.

► **To modify postcards**

- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Maintain Documents**.
The **Maintain Documents** window open.
- 2 Click **Setup** and select **Postcards**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.
- 4 Click on a folder that contains a postcard that you want to modify.

- 5 Click on the name of the postcard that you want to modify.



- 6 Select one of six types of postcards from the **Postcards Type** drop-down menu.
- 7 Edit the postcard text in the word processing window.

Notes

- To format text, click on the icons or click **Format** on the toolbar and select appropriate font, paragraph, and color options.
- To insert dates, times, and pictures, click **Insert** on the toolbar and select an appropriate option.
- To insert merge fields into your file, click **Insert** on the toolbar and select **Merge Fields**. Select a field from the Merge Fields window and click **Insert**.
- To insert tab stops into your file, click the arrow icons on the toolbar.

- 8 If you want to print a test page of the postcard that you just modified, click **File** on the Maintain Documents toolbar and select **Print**.
- 9 Click **File** on the Maintain Documents window toolbar and select **Save** or click the **Save** icon.

► To print postcards

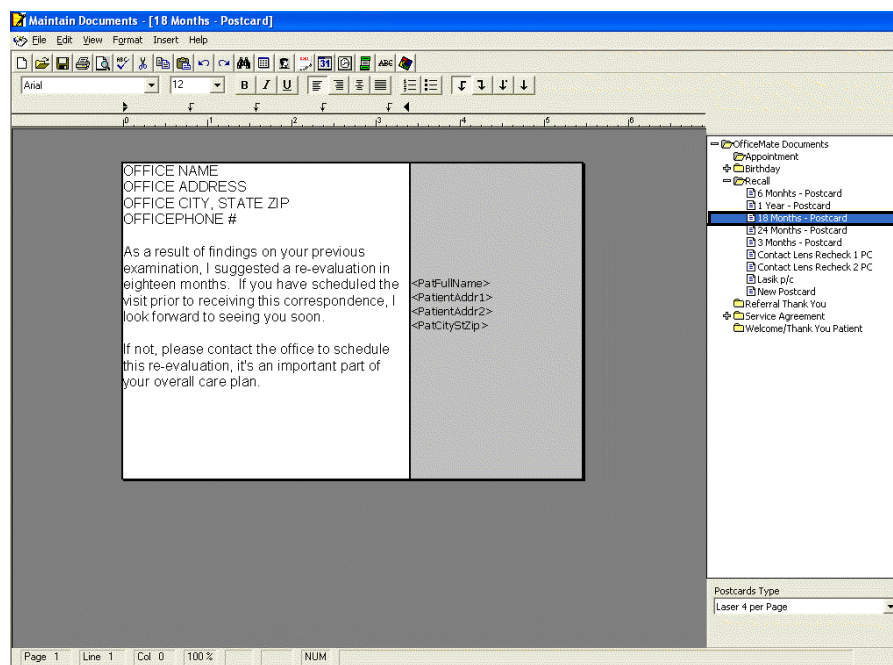
To print postcards that you have created or modified, go to [Printing Correspondences](#) on page 481.

► To rename postcards

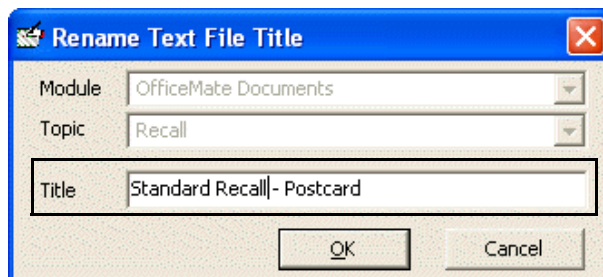
- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Maintain Documents**.

The **Maintain Documents** window open.

- 2 Click **Setup** and select **Postcards**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.
- 4 Click on a folder that contains a postcard that you want to rename.
- 5 Click on the name of the postcard that you want to rename.



- 6 Click **File** and select **Rename Title**.
The **Rename Text File Title** window opens.
- 7 Type the new text file title in the **Title** text box.



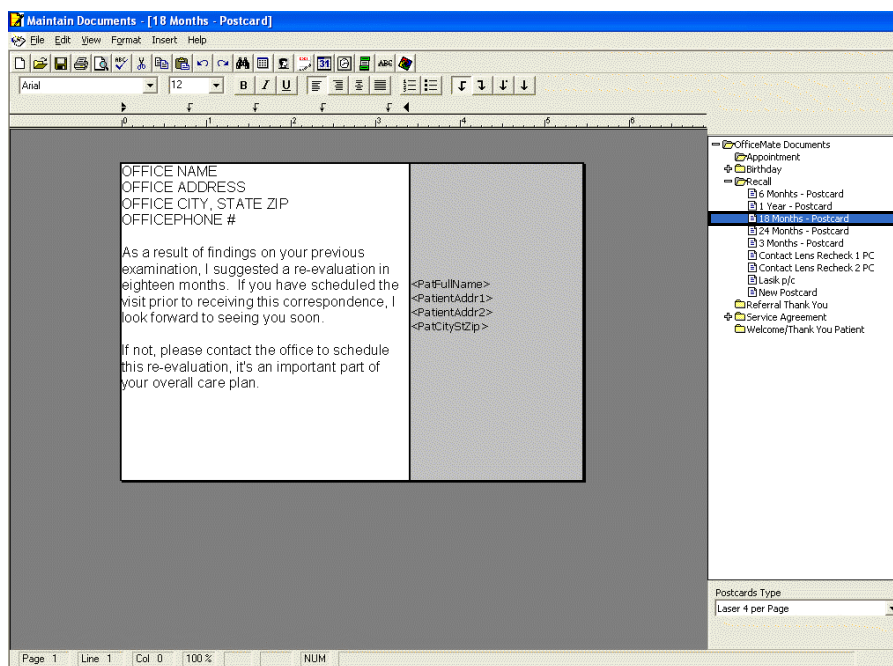
- 8 Click **OK**.

► To delete postcards

Note

You cannot delete postcards that are assigned to a recall mailing schedule.

- 1 Click **Tasks** on the OfficeMate main window toolbar and select **Maintain Documents**.
The **Maintain Documents** window open.
- 2 Click **Setup** and select **Postcards**.
- 3 Click on the **OfficeMate Documents** folder on the right side of the window.
- 4 Click on a folder that contains a postcard that you want to delete.
- 5 Click on the name of the postcard that you want to delete.



- 6 Click **File** and select **Delete**.
The **Delete Document Warning** window opens.
- 7 Click **Yes** to delete the postcard.

CHAPTER 17

Maintaining OfficeMate & Protecting Your Data

In this chapter:

- [Compacting Your OfficeMate Access Database, 509](#)
- [Backing Up Your Data, 510](#)
- [Restoring Database Files, 515](#)

OfficeMate uses a database to store your data and provide quick and efficient access to your data files. Databases are complex structures and require regular maintenance and backup. The performance and operation of OfficeMate is directly affected by how well your database and computer system is maintained. When regular maintenance is not performed, problems begin to occur in your computer system and your OfficeMate database.

Note

For information on maintaining your networks and computer systems, review the Maintaining Networks document at www.officemate.net/pdfs/Network Maintenance.pdf.

Compacting Your OfficeMate Access Database

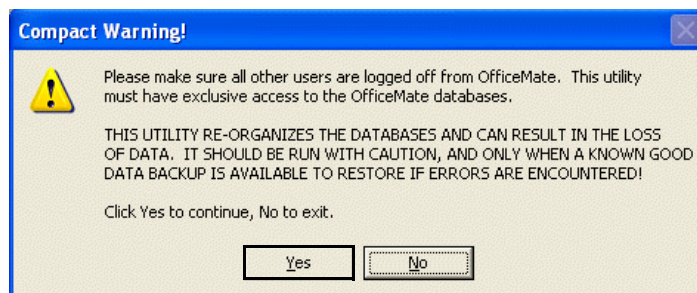
Note

This section is *only* applicable to OfficeMate users with an Access database. If you are using a SQL database, you cannot compact your OfficeMate database using the instructions in this section.

OfficeMate Software Solutions suggests that you compact your database weekly. Follow the instructions below to compact your OfficeMate database.

- 1 **Protect your practice: BACK UP YOUR DATA!** For more information on backing up your data, go to [Backing Up Your Data on page 510](#).
- 2 Click **Tools** on the OfficeMate main window toolbar.
- 3 Select **Compact Database**.
The **Compact Warning!** window opens.

- 4 Click **Yes** to compact your OfficeMate database.



Backing Up Your Data

Back up your OfficeMate database files on a regular basis! A full database backup is the best way to make sure that you can recover your OfficeMate database files in the event of a database corruption, hardware or software failure, computer virus attack, fire, theft, or natural disaster.

Notes

- OfficeMate Software Solutions limits the support it provides exclusively to its own products and therefore does *not* provide assistance and support for *any* issues related to the backup and restoration of data.
- OfficeMate Software Solutions recommends backing up your OfficeMate and ExamWRITER data *every day*.
- OfficeMate Software Solutions recommends using *multiple* back up methods and backing up your data to *multiple* files in case one backup file is corrupt.
- The OfficeMate program does *not* provide backup functions.

This section includes the following topics:

- [Automatically Backing Up SQL & Access Databases, 511](#)
- [Manually Backing Up Databases, 511](#)
- [Restoring Database Files, 515](#)

Automatically Backing Up SQL & Access Databases

Although there are many types of backup media that you can use to back up your database files (such as CD-R, CD-RW, Zip disk, and Jaz disk), OfficeMate Software Solutions recommends using iBackup Powered by DataHEALTH for data backup and off-site storage. iBackup Powered by DataHEALTH protects your practice by automatically backing up, encrypting, and storing your data in a secure, off-site data center. If you experience a data loss, all of your lost files are recoverable anytime with the click of a button. iBackup Powered by DataHEALTH also offers the following benefits:

- Helps you comply with HIPAA privacy and security
- Electronically copies your files through a cable or phone line
- Assures you that your data is being properly backed up and securely stored
- Tells you which files you need to back up
- Uses FastBIT duplication technology to decrease the size of your files
- Offers hands-on customer service including Web training and installation
- Provides great value and peace of mind for the cost of a one-time setup fee and as little as \$1.00 per day

OfficeMate iBackup Powered by DataHEALTH offers a free 30-day, obligation-free trial! For more information on this offer and iBackup Powered by DataHEALTH, contact John Lee at 1.800.269.3666, extension 5036, or http://www.officemate.net/officemate_va_DataHEALTH.aspx.

Manually Backing Up Databases

This section tells you how to manually back up your database, including how

- [To manually back up an Access database, 511](#)
- [To manually back up a SQL database, 513](#)

► To manually back up an Access database

Note

If you are not familiar with your backup procedures, contact your local computer administrator or the manufacturer of your backup media.

- 1 Close OfficeMate and ExamWRITER on all of your computers.

Note

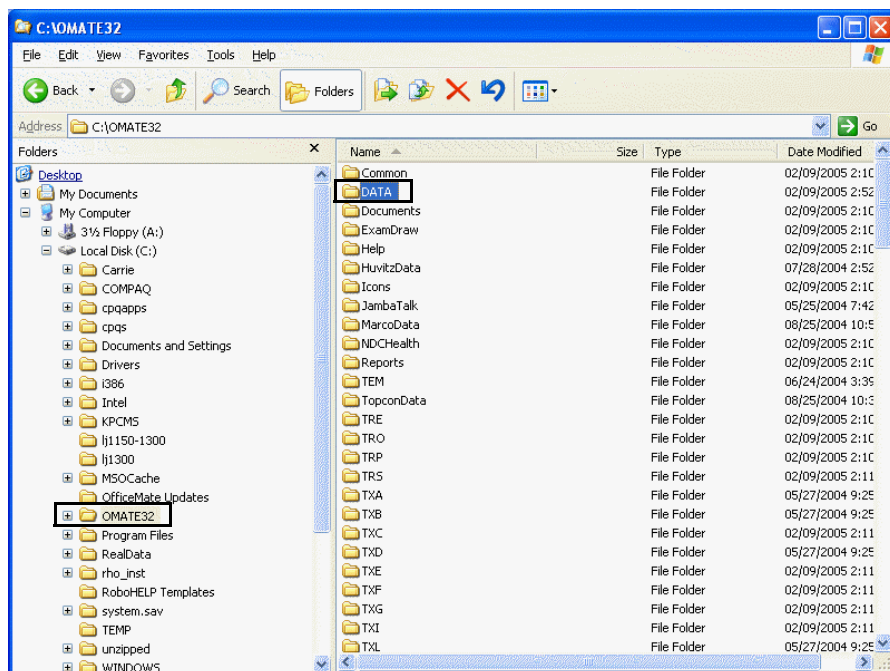
The integrity of your backup is severely compromised, and in some cases invalidated, if you perform a backup while OfficeMate and ExamWRITER are open.

- 2 Review your backup device and media manufacturer's replacement recommendations and ensure that your backup device and media are within their useful product lifecycle.
- 3 Clearly label the backup media that you are using for each day of the week that your office is open for business.

- 4 Review the HIPAA security and privacy requirements and ensure that your backup procedures are compliant.
- 5 Navigate to **OMATE32\DATA** and back up this folder.

Note

If you are storing eDocuments or electronic claims in a location other than OMATE32\DATA, ensure that you also navigate to the location of these documents and back them up.



- 6 Ensure that the backup process is successfully copying the entire folder to the backup media.

Note

You may also back up your data to a temporary folder to ensure that all of your important data has been successfully backed up.

- 7 Move the backup media off site everyday and store it in a secure location.

► To manually back up a SQL database

Notes

- If you are not familiar with your backup procedures, contact your local computer administrator or the manufacturer of your backup media.
- Because you cannot back up your SQL database with a simply copy function; you must use another tool, such as SQL Server 2005 Management Studio Express Edition, to back up your SQL database. For information on using the SQL Server 2005 Management Studio Express Edition to back up and restore your database, read *Managing SQL Server Express with SQL Server 2005 Management Studio Express Edition* at www.officemate.net/pdfs/Managing_SQL_Server.pdf.
- Ensure that whatever back up method you use is SQL compatible and is capable of backing up your entire SQL database and shared data directory.

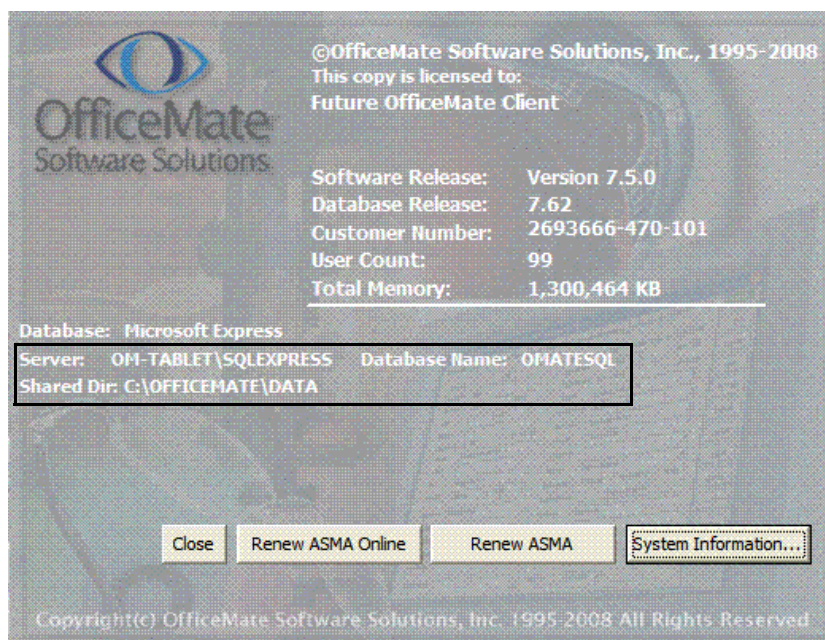
- 1 Before you begin a backup process with a media type that is *not* OfficeMate iBackup Powered by DataHEALTH, ensure that you have

- Closed OfficeMate and ExamWRITER on all of your computers.

Note

The integrity of your backup is severely compromised, and in some cases invalidated, if you perform a backup while OfficeMate and ExamWRITER are open.

- Reviewed your backup device and media manufacturer's replacement recommendations and ensure that your backup device and media are within their useful product lifecycle.
- Clearly labeled the backup media that you are using for each day of the week that your office is open for business.
- Reviewed the HIPAA security and privacy requirements and ensure that your backup procedures are compliant.
- Determined the location of your SQL database *and* your shared data directory by opening ExamWRITER, clicking **Help**, and selecting **About ExamWRITER**. The server location and name of your SQL database is listed, along with the location of your shared data directory.



Note

If you are storing eDocuments or electronic claims in a location other than Program Files\OFFICEMATE\DATA, determine the location of your eDocuments and EMC folders.

- 2 Select a tool to back up your SQL database and shared data directory and ensure that you back up both your SQL database *and* your shared data directory, as determined in step 1 above.

Note

Because you cannot back up your SQL database with a simple copy function; you must use another tool, such as SQL Server 2005 Management Studio Express Edition, to back up your SQL database. You can, however, back up your shared data directory using a simple copy function.

- 3 Ensure that your backup process was successful.
- 4 Move the backup media off site everyday and store it in a secure location.

Restoring Database Files

This section tells you how to restore database files, including how

- [To restore Access database files, 515](#)
- [To restore SQL database files, 515](#)

► To restore Access database files

Note

If you need to restore data from a backup, ensure that your staff is properly trained to restore data. If you are not familiar with your restoration procedures, contact your local computer administrator or the manufacturer of your backup media.

- ❖ Follow the instructions in your backup program to restore your OMATE32 database files to their original location (typically C:\OMATE32) on your computer or server.

► To restore SQL database files

Note

If you need to restore data from a backup, ensure that your staff is properly trained to restore data. If you are not familiar with your restoration procedures, contact your local computer administrator or the manufacturer of your backup media.

Follow the instructions in your backup program to restore your SQL database and shared data directory to their original locations (typically C:\Microsoft SQL Server\MSSQL.1\MSSQL\Data and C:\Program Files\OFFICEMATE\DATA) on your computer or server.

CHAPTER 18

Getting Support

In this chapter:

- Phone Support, 517
- Online Support, 517
- Terms of Support, 518

OfficeMate considers our client service department the backbone of a successful, positive relationship between our company and you, our client. Our goal is to continually enhance the level of service provided by our Client Services department. OfficeMate Software Solutions offers reasonable annual software maintenance agreement fees and, simultaneously, must establish and enforce our service guidelines in order to keep these fees equitable. This chapter outlines our service guidelines and policies.

Phone Support

OfficeMate Software Solutions offers toll-free client service help from 6:00am to 5:00pm Pacific Time. Dial 800.942.5353 and choose option 1 to reach our Client Services team.

Your calls are answered live by our knowledgeable Client Services team who will assist you with your support issues. OfficeMate's service levels are equal to or better than the best service levels provided by any competitive help desk service in our industry today.

Online Support

To access online help for OfficeMate, click **Help** on the OfficeMate main window and select **OfficeMate Help Topics**. The *OfficeMate User's Guide* help system opens. You can also access online help by pressing the **F1** key anywhere in OfficeMate.

For more support information on OfficeMate or any of the OfficeMate Suite products, go to the OfficeMate Software Solutions support Web page at <http://www.officemate.net>. You can e-mail your support questions to the OfficeMate Client Services department at Support@OfficeMate.net or http://www.officemate.net/contact_support.aspx.

OfficeMate Software Solutions also maintains an extensive online knowledge base that is full of helpful articles and answers to frequently asked questions. We highly encourage you to seek out answers to your questions and submit new questions using this knowledge base at <http://www.officemate.net/omkb/>.

Terms of Support

The Annual Software Maintenance Agreement (ASMA) is a mandatory agreement all clients must maintain each year through the payment of an annual fee for each software product licensed from OfficeMate Software Solutions. This ASMA includes the annual OfficeMate/Report WRITER/ExamWRITER license, all software upgrades, and toll-free help desk services for our software applications.

The OfficeMate Software Solutions business model requires us to amortize our annual investment in software application development and client service across our broad base of clients using OfficeMate Software Solutions' software. By requiring that everyone invest by paying this low annual fee each year, we can retain lower fees. If fewer clients participate, the result would be substantially higher fees to amortize these services across fewer clients.

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