



User Manual
For



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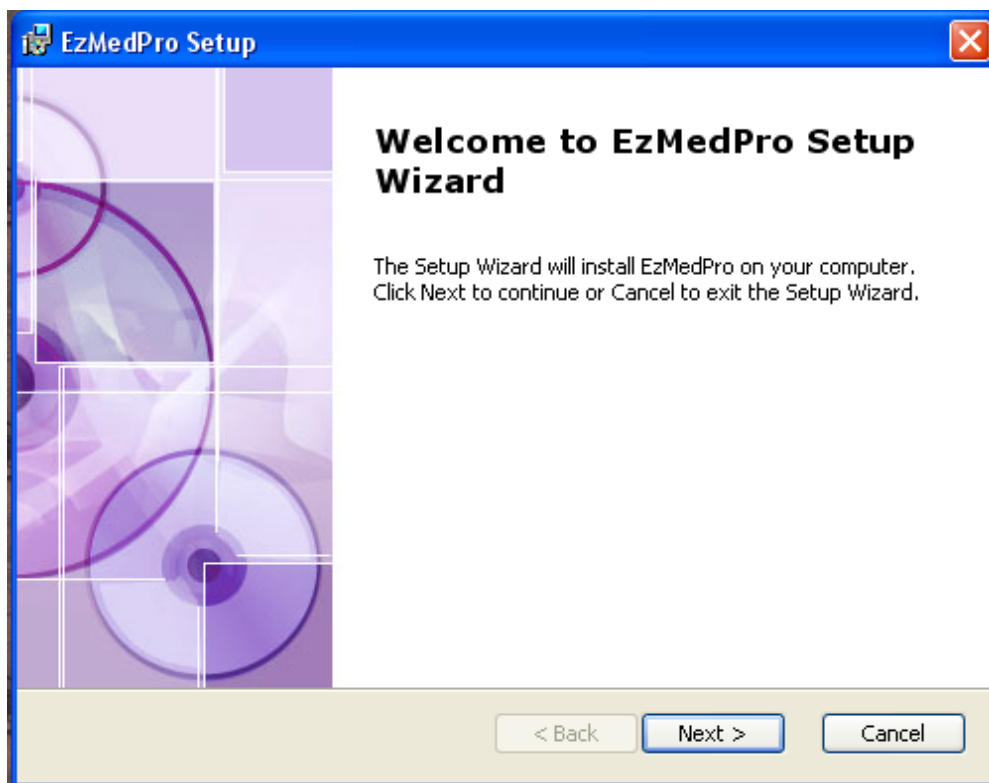
INSTALLATION

Download EzMedPro from <http://www.dsoftsystem.com>

Go to the download Tab and Download EzMedPro for Windows, Linux or Mac OSX.

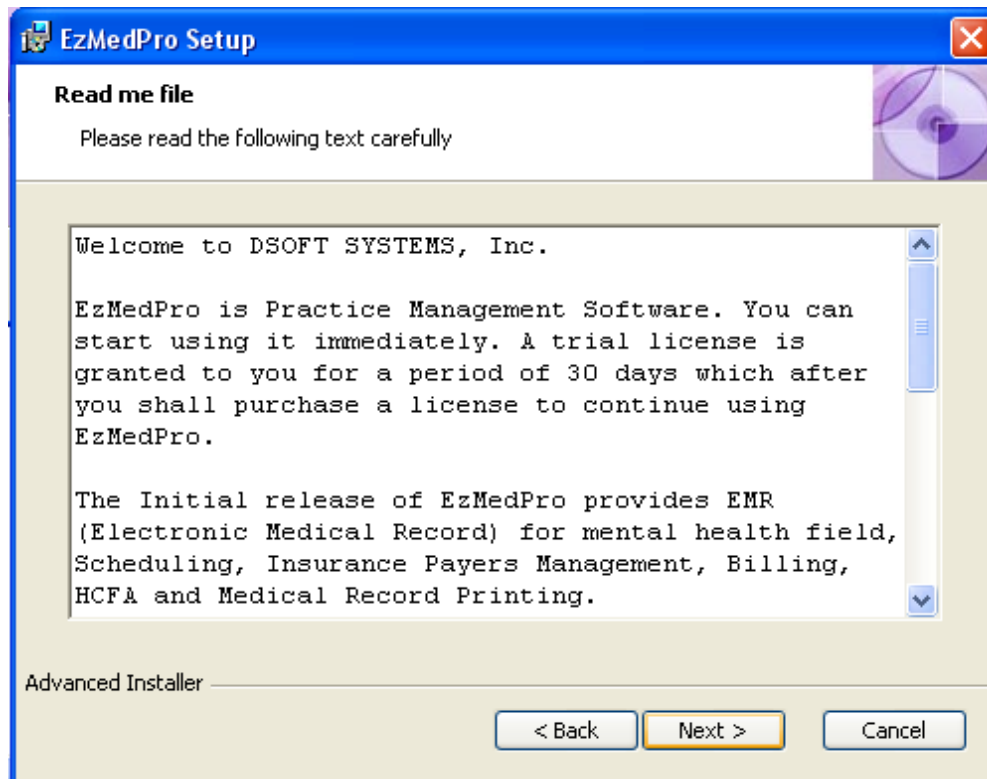
Windows Install

- 1- The download file is ezmedpro.exe or ezinstall.exe.
- 2- Double click on the downloaded file:

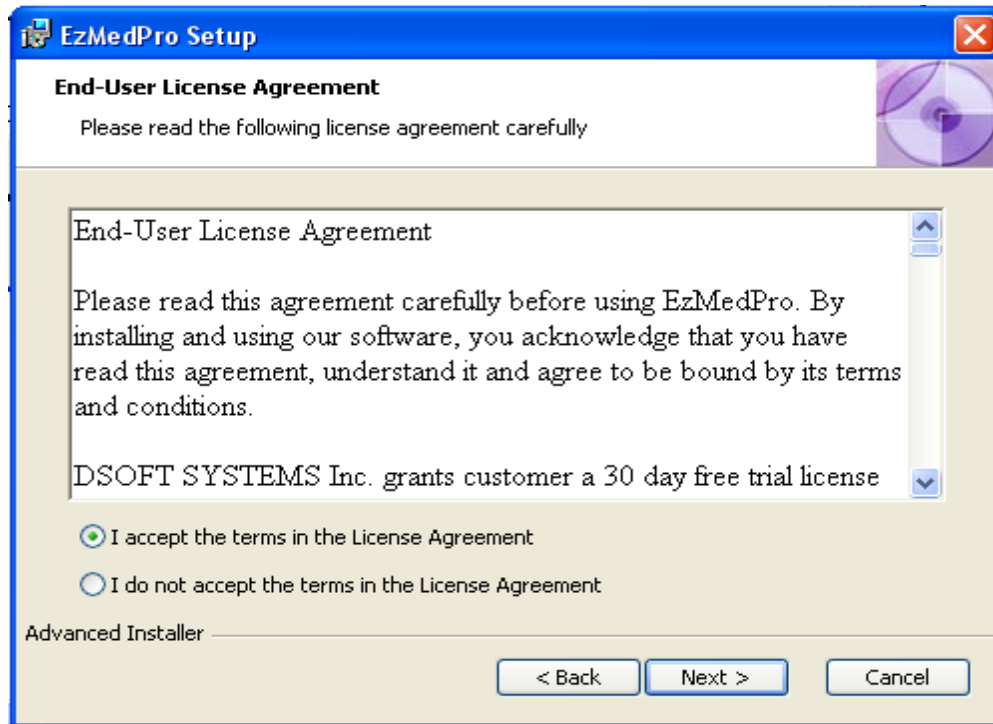


- 3- Click Next

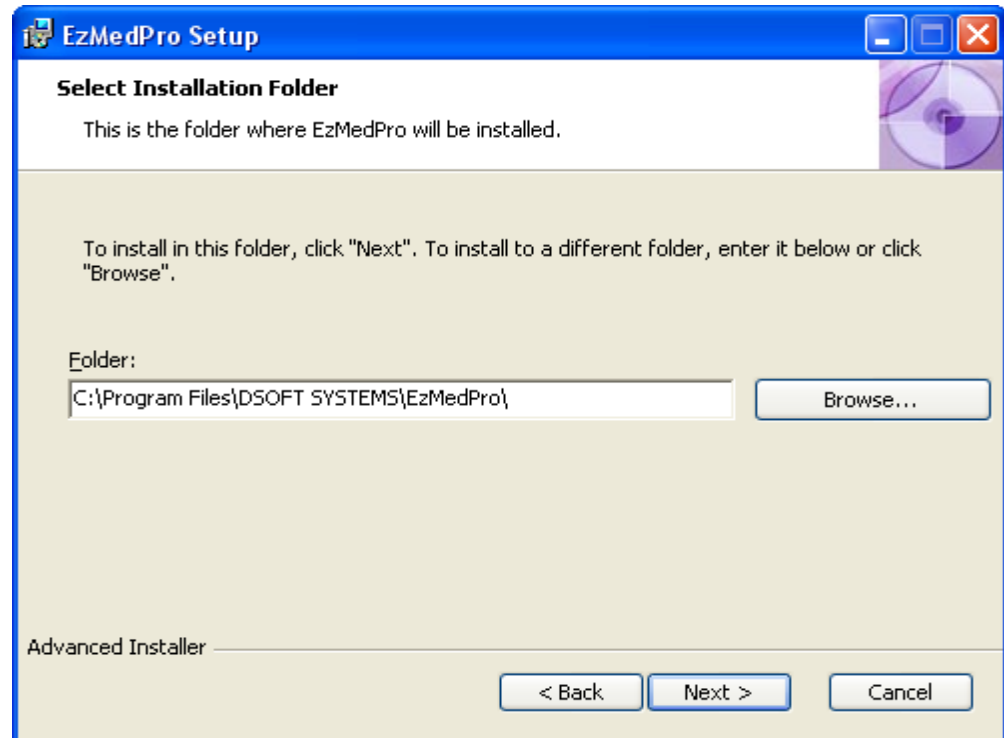
4- The Readme message will appear.



5- Accept the license

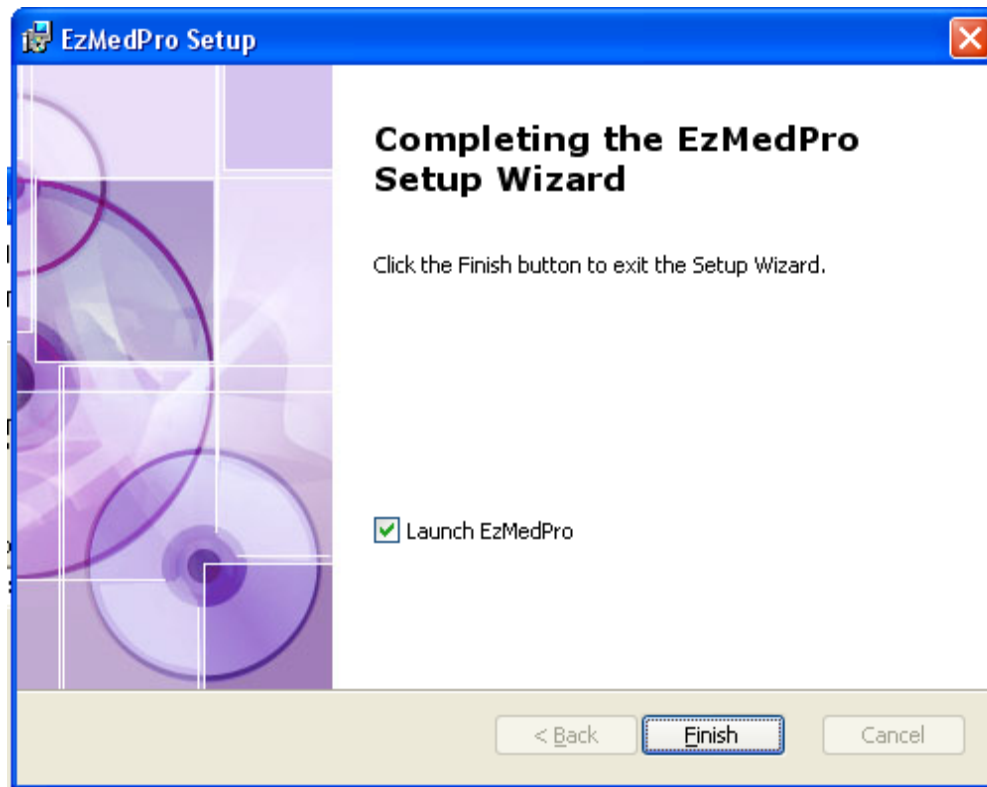


6- Choose the folder to Install EzMedPro



7- A Screen showing the install in progress will appear

8 -The Install is complete screen will appear with a check box to start EzMedPro.

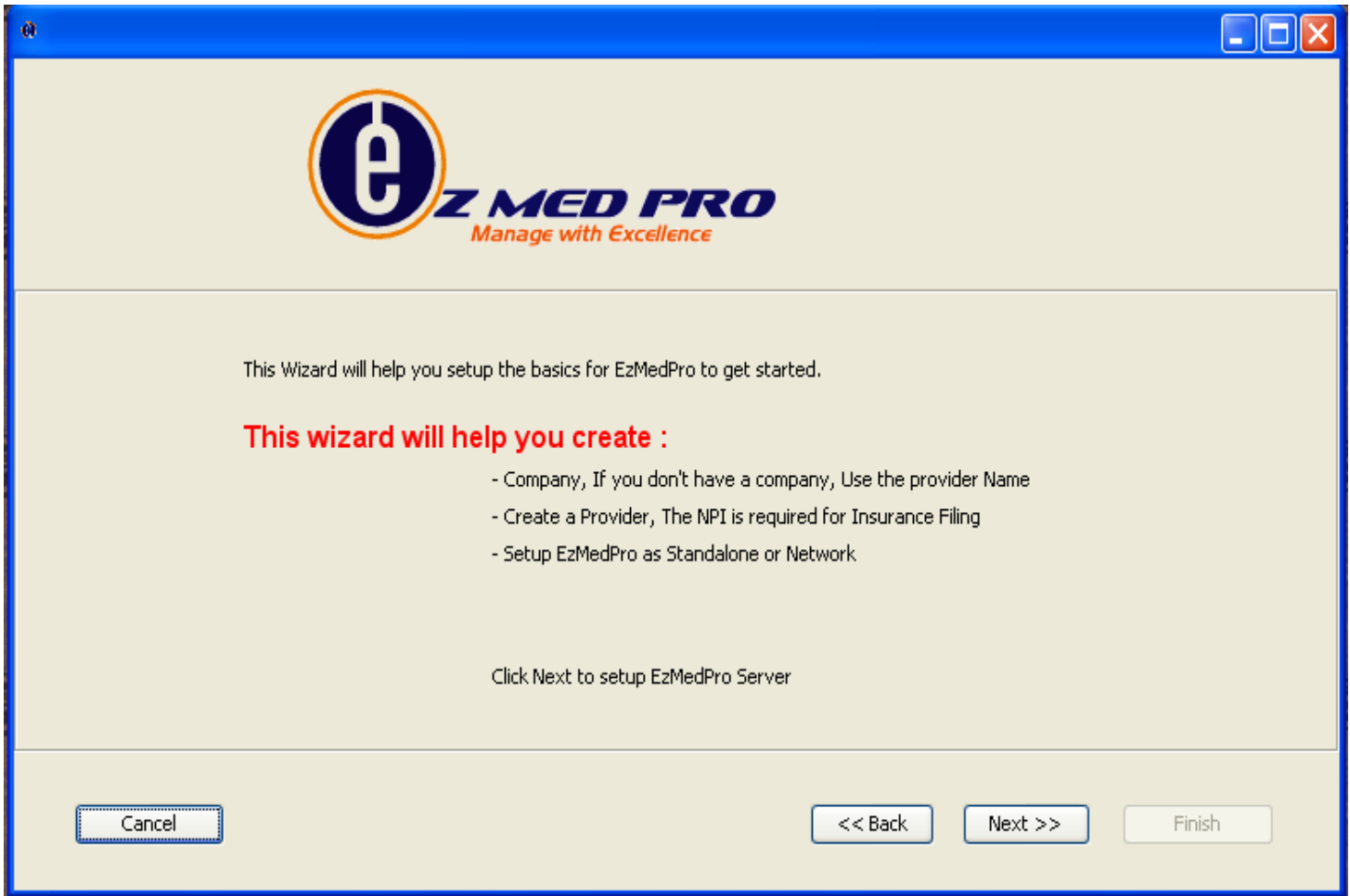


9- The install has created a shortcut in your desktop.

10- The first time you start EzMedPro, A Wizard will guide to create you company, provider, load CPT and ICD codes.

EzMedPro Setup

When EzMedPro is started for the first time, the wizard screen will appear to help guide to setup EzMedPro.



Click Next.

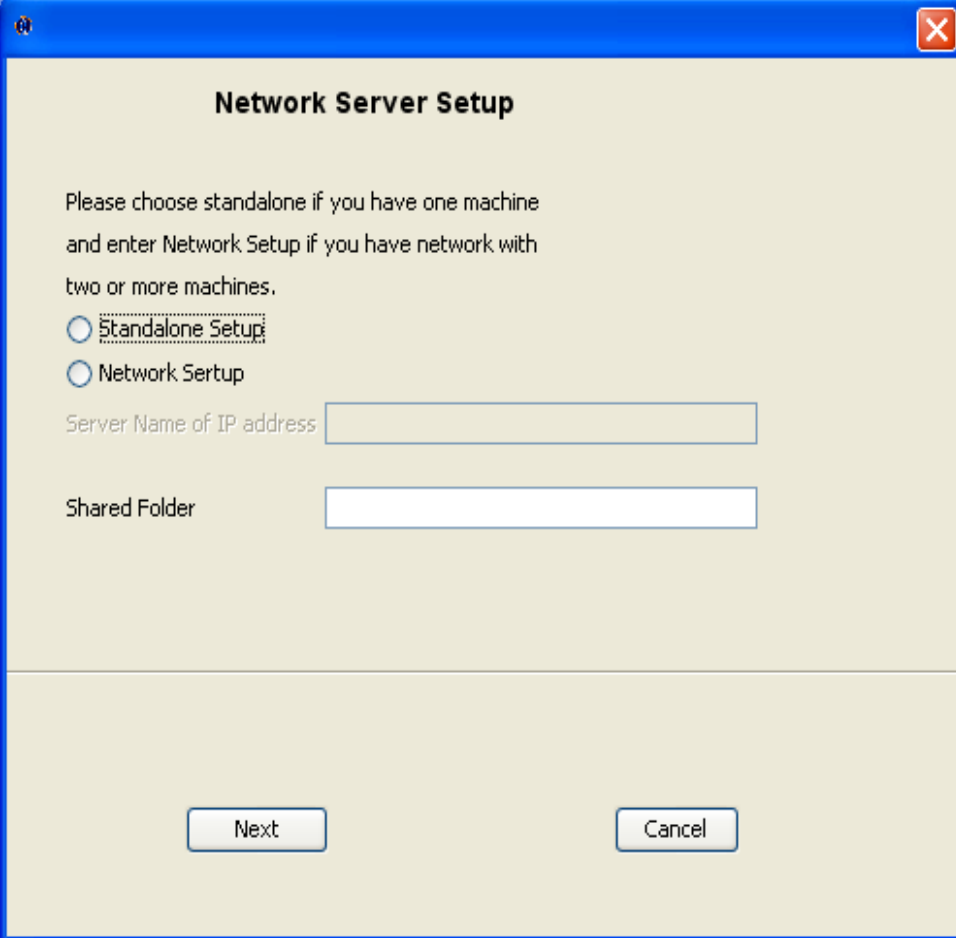
Environment Setup

EzMedPro can be setup in standalone or on networked mode.

In standalone mode, only one machine can use the medical database. The database is integrated with EzMedPro.

In Networked mode, the database is installed separately and many EzMedPro instances installed on separate machines can share the same data.

Setup Mode:



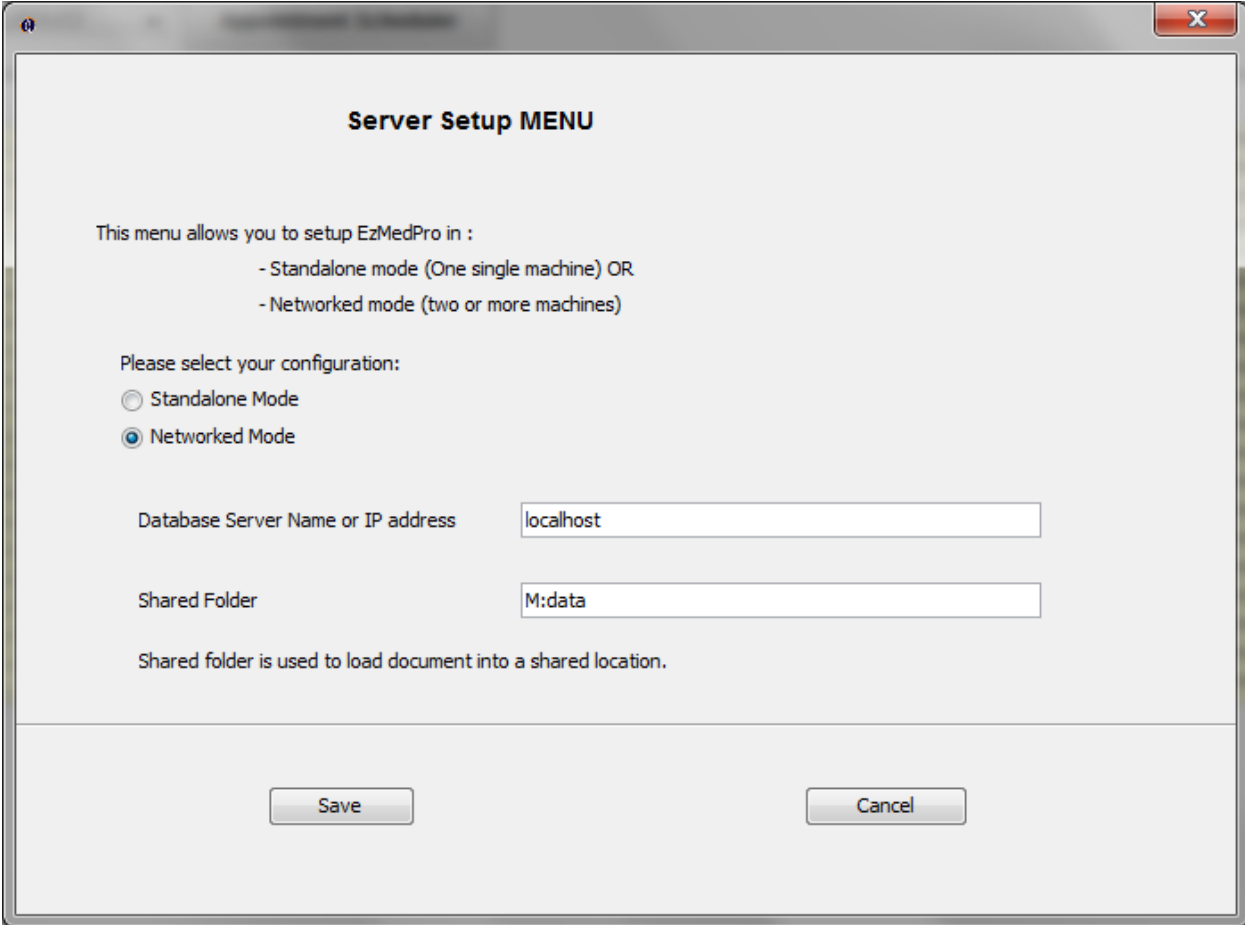
The screenshot shows a Windows-style dialog box titled "Network Server Setup". The dialog has a blue title bar with a close button (X) in the top right corner. The main area has a light beige background. The text inside reads: "Please choose standalone if you have one machine and enter Network Setup if you have network with two or more machines." Below this text are two radio buttons: "Standalone Setup" (which is selected) and "Network Sertup". Underneath the radio buttons are two text input fields: "Server Name of IP address" and "Shared Folder". At the bottom of the dialog, there are two buttons: "Next" and "Cancel".

Network Setup

To setup Network Mode, you need to download the Network Database.

The network Database is only available on Windows platform. After Installing the Network database, RESTART your machine.

EzMedPro can be installed on MAC OSX 10.5+ 64 bits, Linux and Windows.



Server Setup MENU

This menu allows you to setup EzMedPro in :

- Standalone mode (One single machine) OR
- Networked mode (two or more machines)

Please select your configuration:

Standalone Mode

Networked Mode

Database Server Name or IP address

Shared Folder

Shared folder is used to load document into a shared location.

To Setup Networked Mode, **Chose the Network Setup** as shown above.

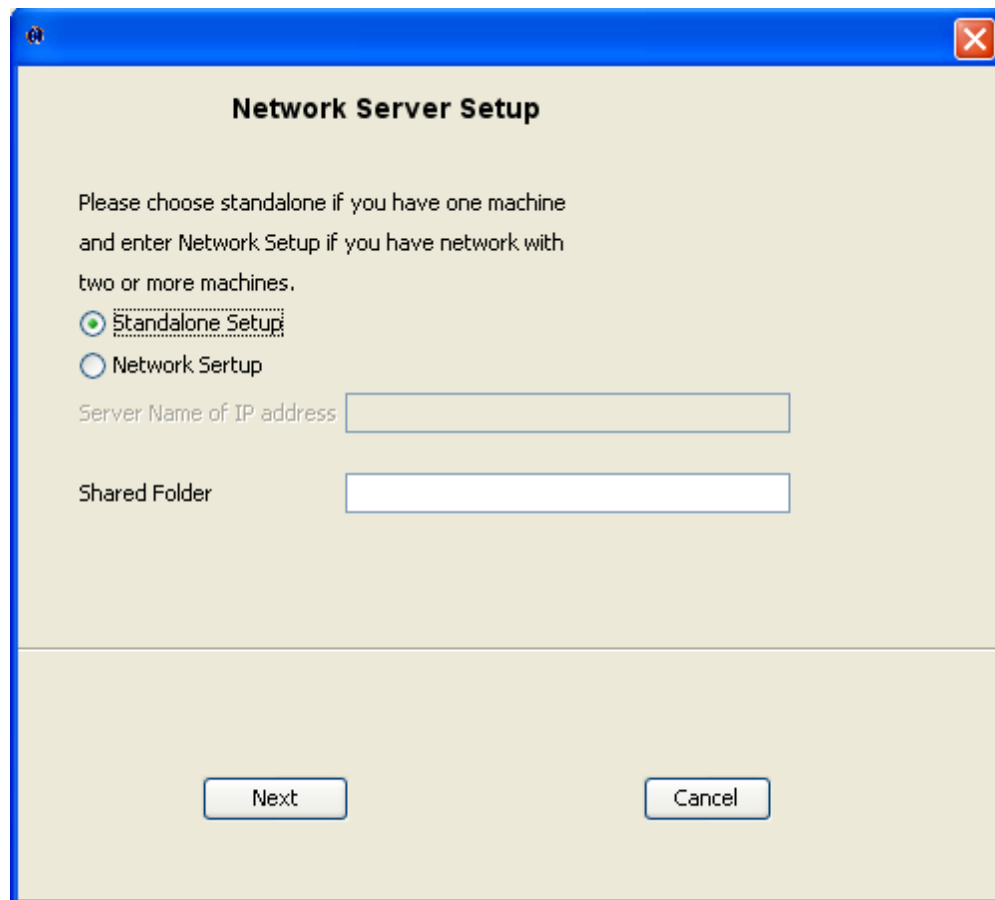
Enter the server name or the IP address of the server where the Database is installed.

Enter the Shared Folder is no longer required.

Click Next

Standalone Mode

In Standalone mode, only one machine can access the data. For security reasons, only one EzMedPro instance can access the embedded database.



The image shows a Windows-style dialog box titled "Network Server Setup". The dialog has a blue title bar with a close button in the top right corner. The main area has a light beige background. At the top, the title "Network Server Setup" is centered. Below the title, there is instructional text: "Please choose standalone if you have one machine and enter Network Setup if you have network with two or more machines." There are two radio buttons: "Standalone Setup" (which is selected) and "Network Sertup". Below the radio buttons, there are two text input fields. The first is labeled "Server Name or IP address" and the second is labeled "Shared Folder". At the bottom of the dialog, there are two buttons: "Next" and "Cancel".

Network Server Setup

Please choose standalone if you have one machine and enter Network Setup if you have network with two or more machines.

Standalone Setup

Network Sertup

Server Name or IP address

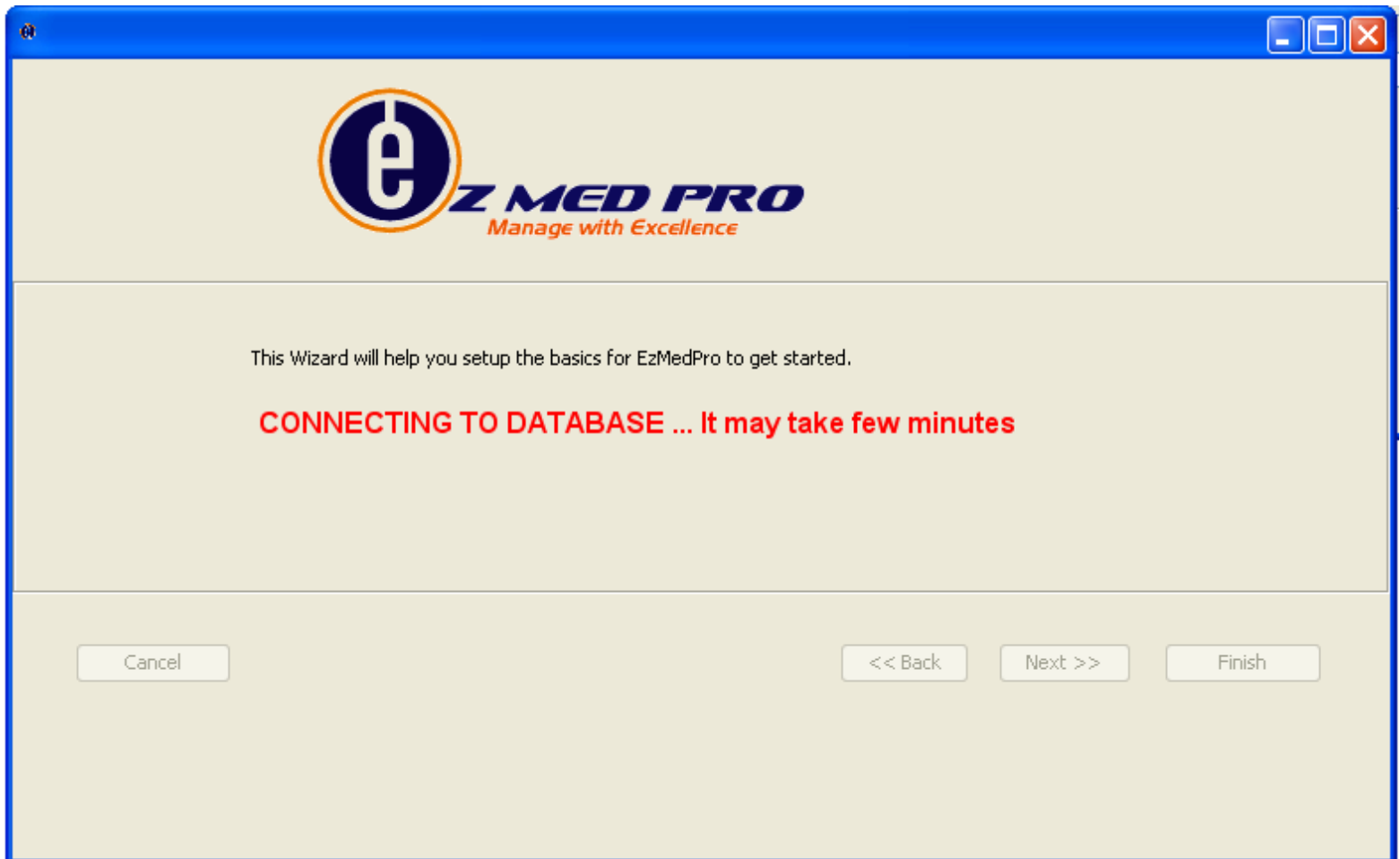
Shared Folder

Next Cancel

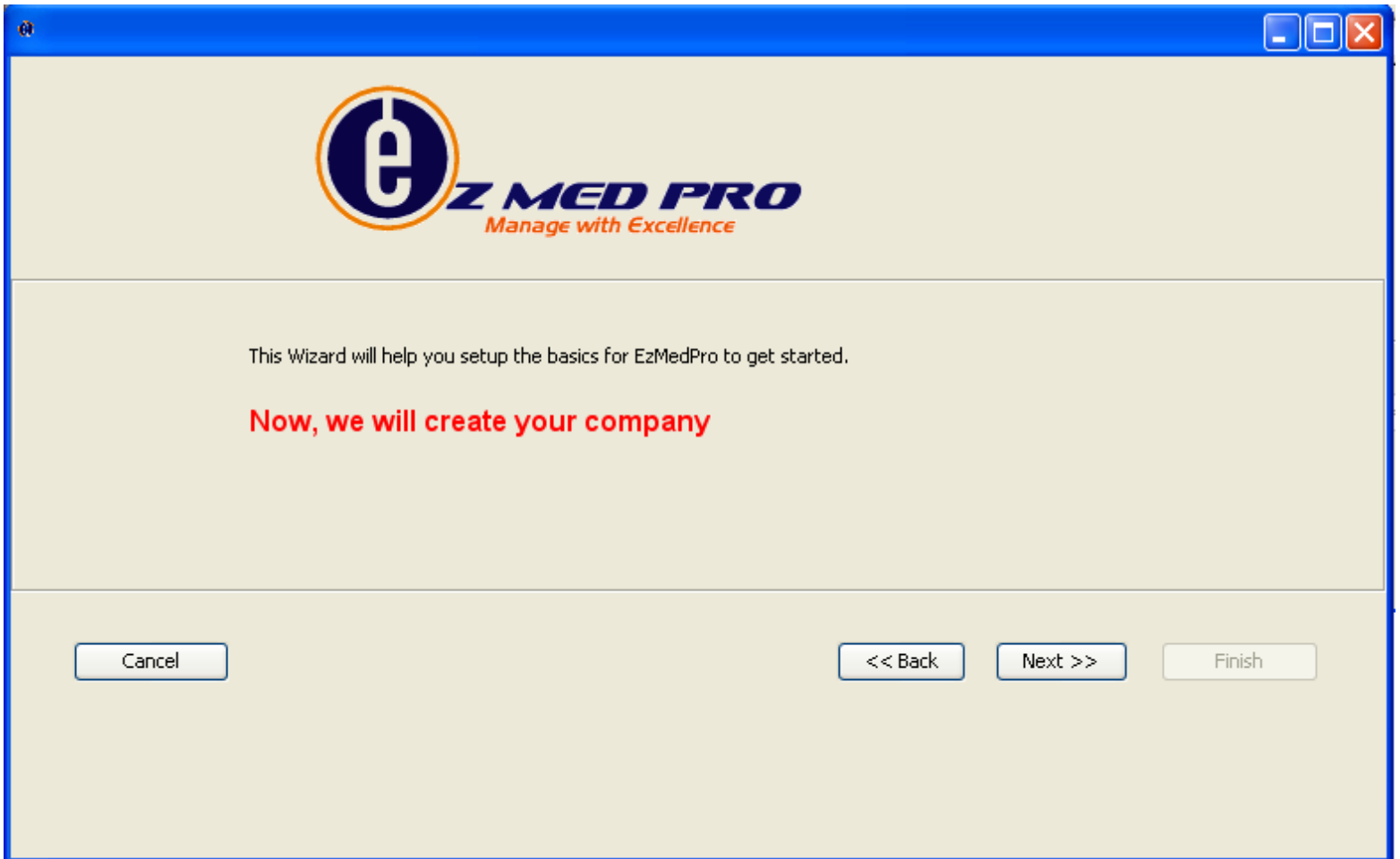
Click Next

Environment Setup

After you have chosen the Setup Mode, EzMedPro will connect to the database and setup your environment.



If your database has not been setup, you will need to provide your company information as well as the first medical provider.



Click NEXT and a Window creates a company will show as below.

The screenshot shows a software window with a blue title bar and a close button in the top right corner. The window contains a form with the following fields and controls:

- Company Name:
- Address:
- City:
- State:
- ZIP Code:
- EIN or Tax ID Number:
- NPI:
- Phone: Fax:
- Office Manager:
- Manager Email:

At the top right of the form area, there is a checkbox labeled "Update". At the bottom of the window, there are four buttons: "Save", "Delete", "Update", and "Cancel".

Enter the information Company Name, Address fields; EIN and Group NPI are required information.

If you don't have the Group NPI, Enter the main provider's NPI.

Click Save.



This Wizard will help you setup the basics for EzMedPro to get started.

Now, we will add a TRIAL SAMPLE of CPT, HCPCS and ICD Codes

Cancel

<< Back

Next >>

Finish

A Trial version of CPT, HCPCS and ICD codes will be added to the database.

Click NEXT



This Wizard will help you setup the basics for EzMedPro to get started.

Now, we will create the provider

Cancel

<< Back

Next >>

Finish

Click NEXT

A Window to create a Provider will show as follows:

The screenshot shows a 'Provider Information' window with the following fields and values:

- Practice: Unified Healing, LLC (dropdown)
- Same address as the practice:
- Provider First Name: Joe
- Provider Initial: P
- Provider Last Name: Black
- Street: 3785 Grove St.
- City: Denver
- State: CO
- ZIP Code: 80211
- SS#: (empty)
- NPI: (empty)
- License #: 123456778
- DEA #: 78787878
- Phone: 720-327-8226
- Fax: (empty)
- Email: (empty)
- Taxonomy Code: 78787878
- Accept Medicare:

Provider Speciality dropdown menu items:

- Mental Health :
- PHYSICIAN : General Physician
- PSYCHIATRY : Mental Health
- TEST : TEST
- TEST2 : TEST 2

Buttons: Save, Delete, Close, Lookup

Click Lookup Button to get the correct Taxonomy code.

Click Save



This Wizard will help you setup the basics for EzMedPro to get started.

The setup is complete

Cancel

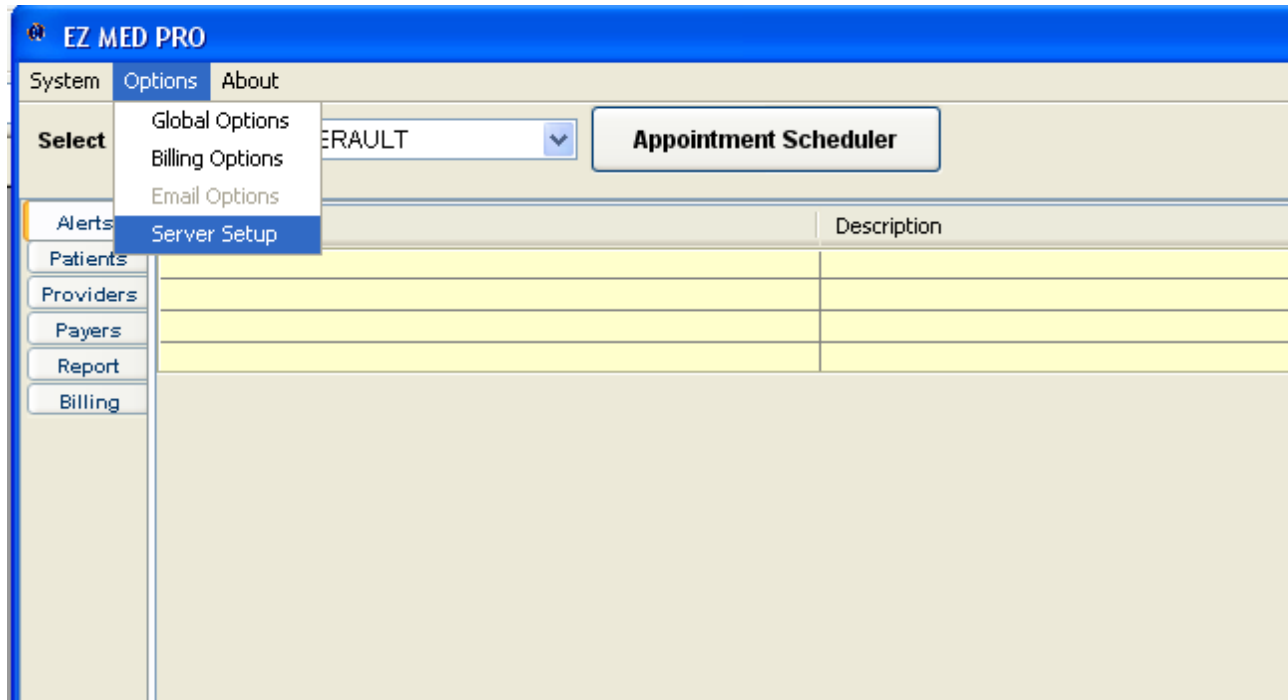
<< Back

Next >>

Finish

Change Setup Mode

To change the setup mode from Network to Standalone, Backup your database first into a file.
Go to Options → Server Setup

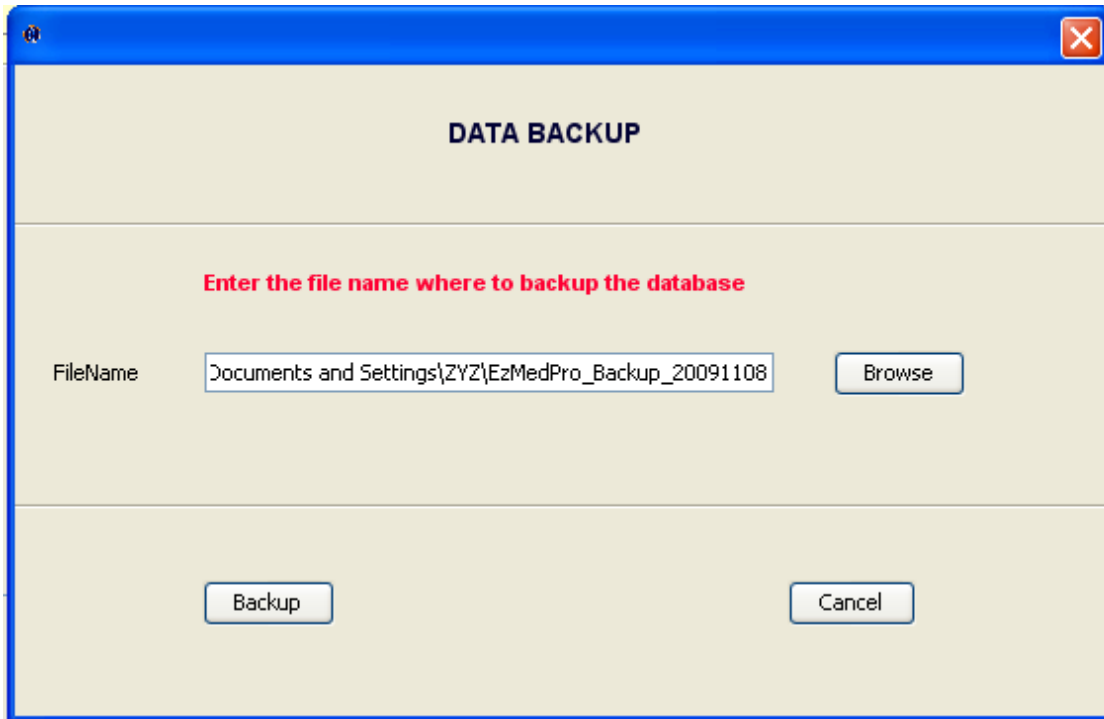


EzMedPro setup section explain how to setup Network or Standalone mode.

Backup and Restore Database

Backup

To backup the database, Start EzMedPro, and Go System → Backup and Restore → Backup



DATA BACKUP

Enter the file name where to backup the database

FileName

Click Backup

Restore

To restore the database, Start EzMedPro, and Go System → Backup and Restore → Restore

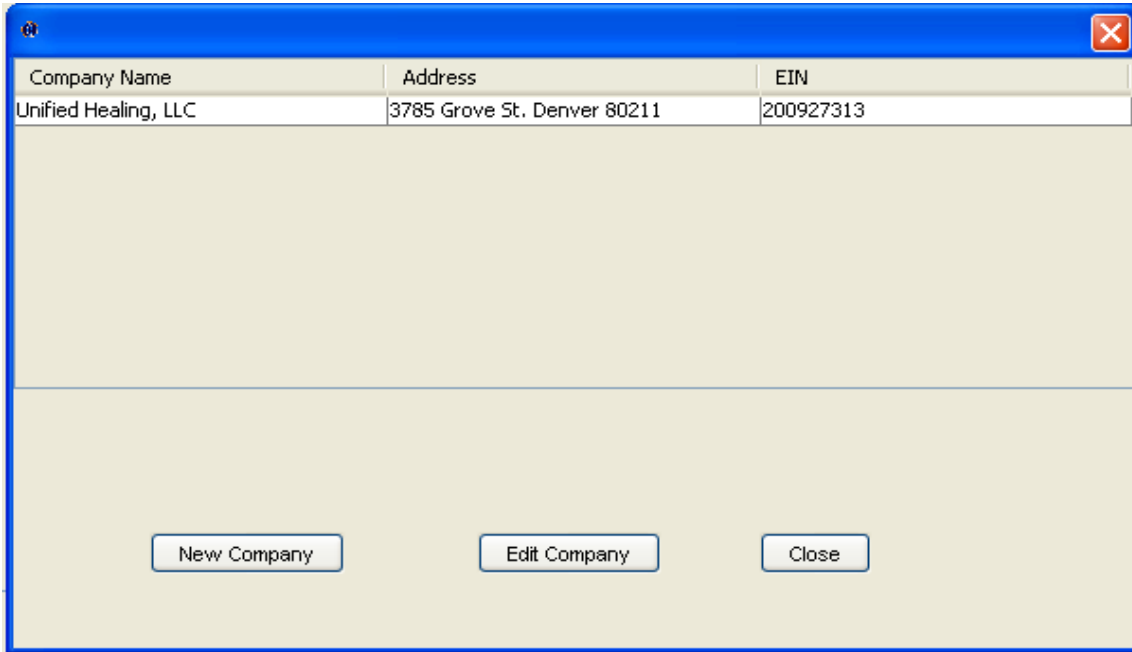
DATA RESTORATION

Enter the file name containing the backup data

Select backup File

System drop down menu.

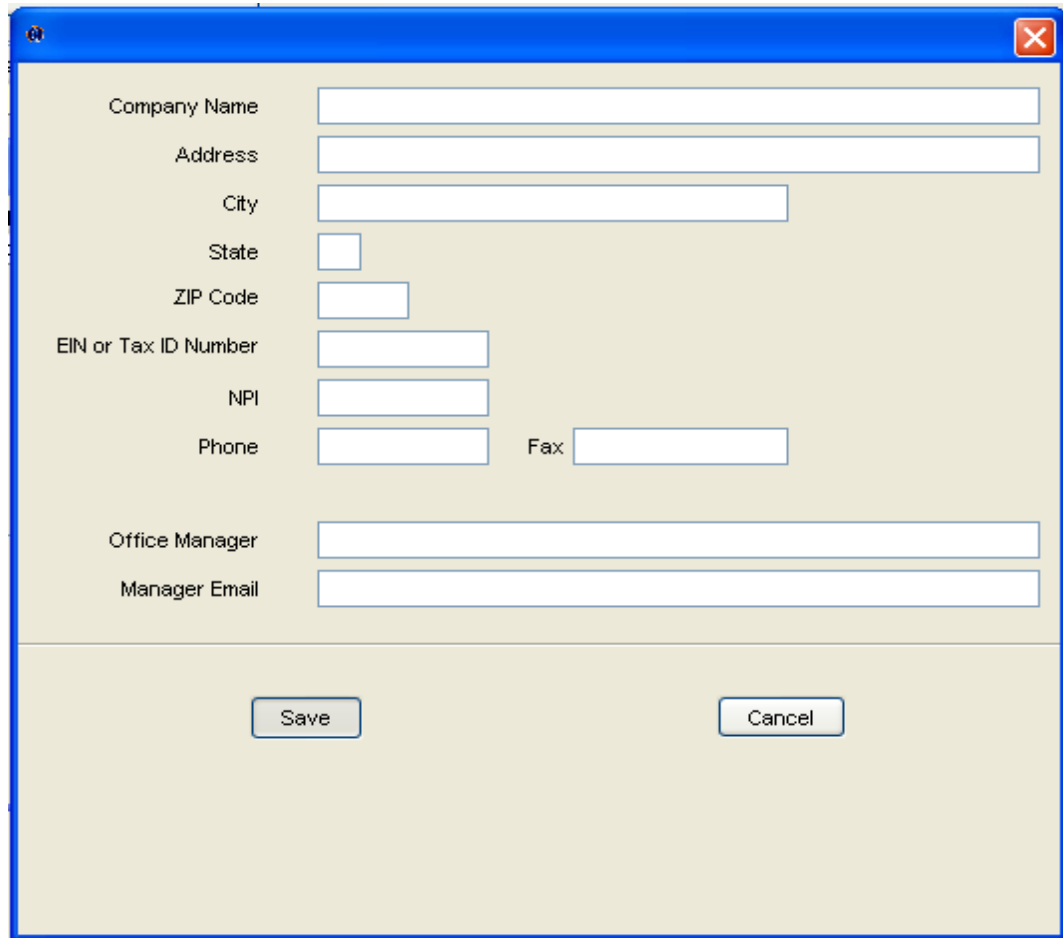
Then select **Setup Company**. Click on **New Company** tab and fill in information.



Company Name	Address	EIN
Unified Healing, LLC	3785 Grove St. Denver 80211	200927313

New Company Edit Company Close

Click New Company Button to create your company.



The image shows a software window with a blue title bar and a close button (X) in the top right corner. The window contains a form with the following fields:

- Company Name
- Address
- City
- State
- ZIP Code
- EIN or Tax ID Number
- NPI
- Phone
- Fax
- Office Manager
- Manager Email

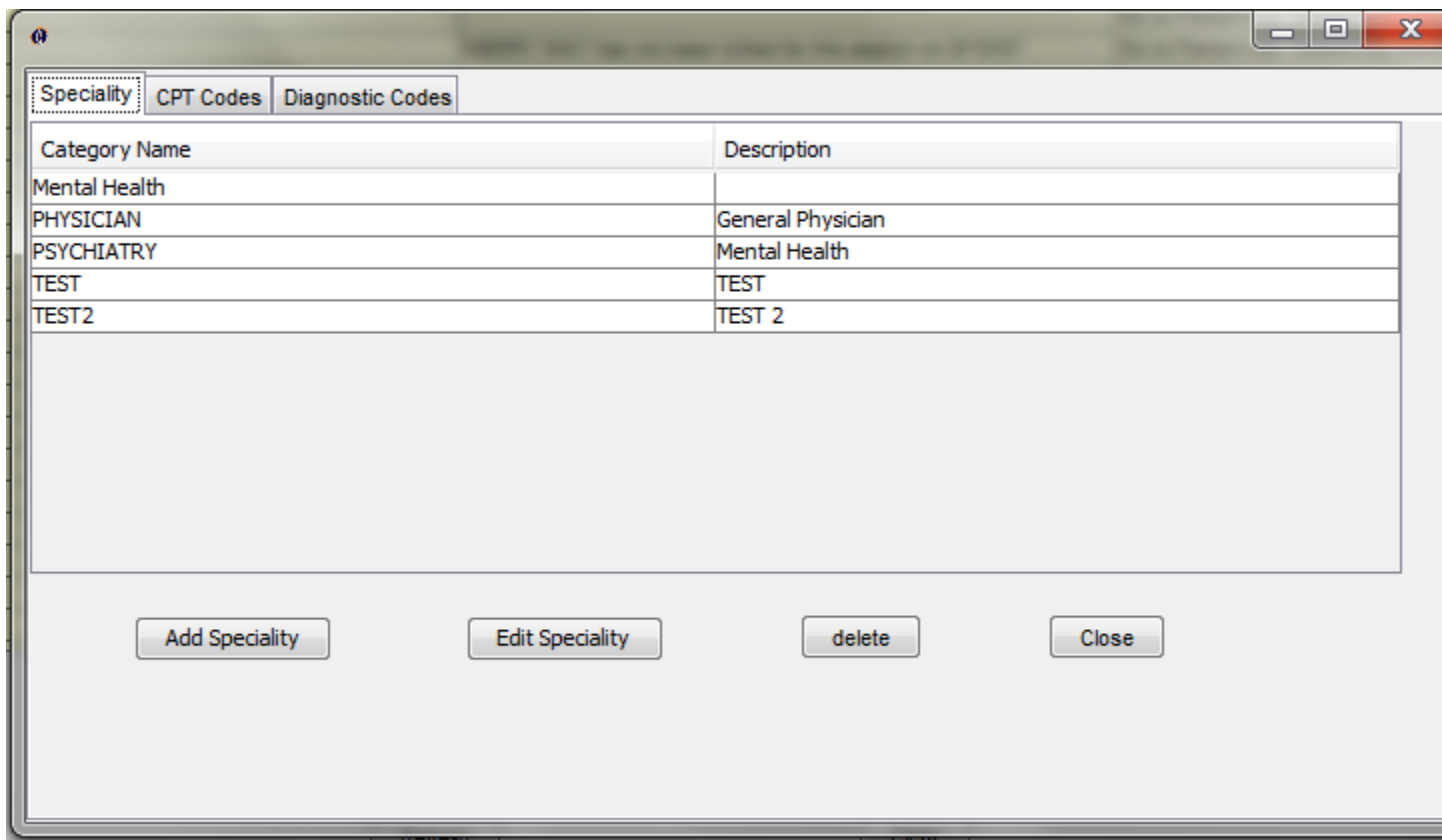
At the bottom of the window, there are two buttons: "Save" and "Cancel".

Then select **save** button. The medical, family, mental health, chiropractor or nursing company name, address, and EIN number should be displayed in the table above. Then click the **Close** button.

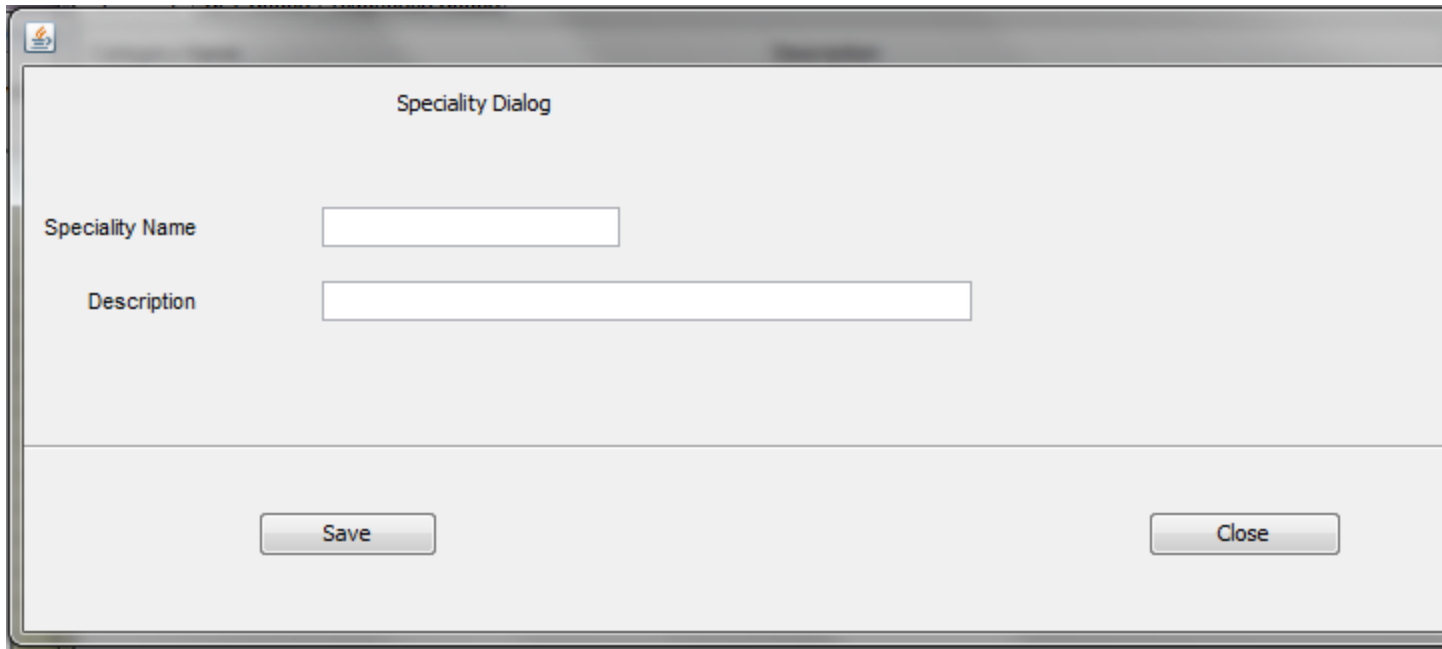
CPT and Diagnostic Codes

In this management software for healthcare, select the **System** drop down menu. Then select **CPT and Diagnostic Codes**.

Under the **Speciality** tab is where you enter your medical Speciality such as mental health, general medicine, pediatrics, etc. and a description of that Speciality.



To add Speciality, Click Add Speciality Button.



A screenshot of a software dialog box titled "Speciality Dialog". The dialog has a light gray background and a standard window border. At the top center, the title "Speciality Dialog" is displayed. Below the title, there are two input fields. The first is labeled "Speciality Name" and is a single-line text box. The second is labeled "Description" and is a multi-line text box. At the bottom of the dialog, there are two buttons: "Save" on the left and "Close" on the right. The "Save" button is positioned to the left of the "Close" button.

CPT Codes

CPT Code	Description	Category	Price
0171T	Insertion of posterior spinous pr...	PHYSICIAN	100.00
0172T	Insertion of posterior spinous pr...	PHYSICIAN	100.00
0173T	Monitoring of intraocular pressur...	PHYSICIAN	100.00
0174T	Computer-aided detection (PHYSICIAN	100.00
0175T	Computer-aided detection	PHYSICIAN	100.00
0176T	Transluminal dilation of aqueous ...	PHYSICIAN	100.00
0177T	Transluminal dilation of aqueous ...	PHYSICIAN	100.00
0178T	Electrocardiogram	PHYSICIAN	100.00
0179T	Electrocardiogram	PHYSICIAN	100.00
0180T	Electrocardiogram	PHYSICIAN	100.00

Buttons: Add new Code, Edit Code, Delete, Close

To Add CPT Code, Click **Add new Code**

The window below will appear, fill in the information and click save. Enter the description and price in the subsequent boxes. Make sure and highlight the correct Categoryt in the **Speciality** box and **save** the data. The number, description and price should be listed in the CPT table

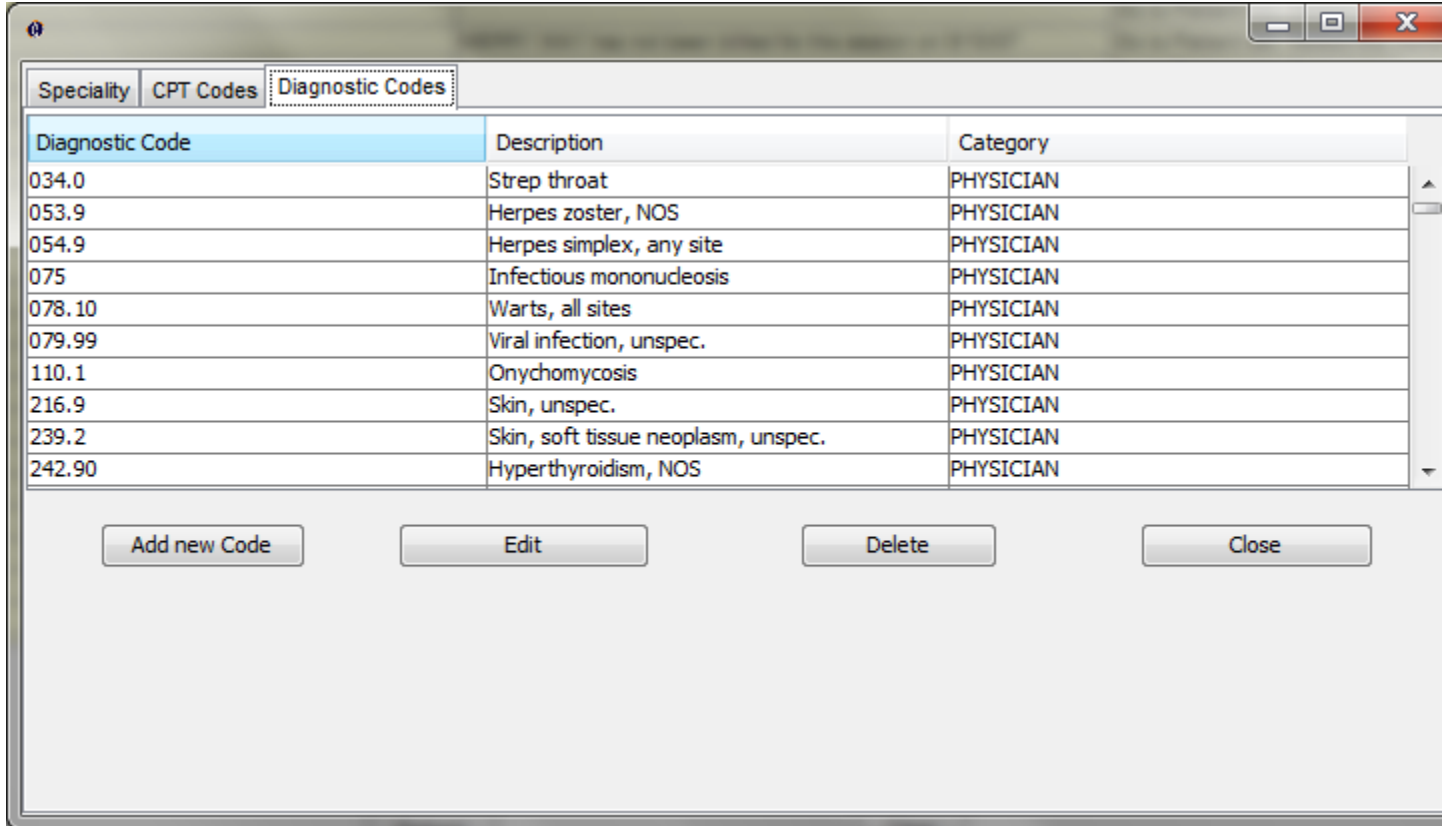
The screenshot shows a software window titled "CPT and PCHCS Codes" with a standard Windows-style title bar (minimize, maximize, close buttons). The window contains a form with the following fields and options:

- CPT Code:** A text input field containing the value "87873".
- Description:** A text input field containing the value "XYZ ISSUE".
- Price:** A text input field containing the value "96.00".
- Speciality:** A dropdown menu with the following options:
 - Mental Health: (highlighted in blue)
 - PHYSICIAN: General Physician
 - PSYCHIATRY: Mental Health
 - TEST: TEST
 - TEST2: TEST 2

At the bottom of the window, there are two buttons: "Save" on the left and "Close" on the right.

ICD and Diagnostic codes

Click on Diagnostic Codes Tab



To add a new code, Click Add new Code Button.

Diagnostics and ICD Codes

Diagnostic Code

Diagnostic Description

Speciality

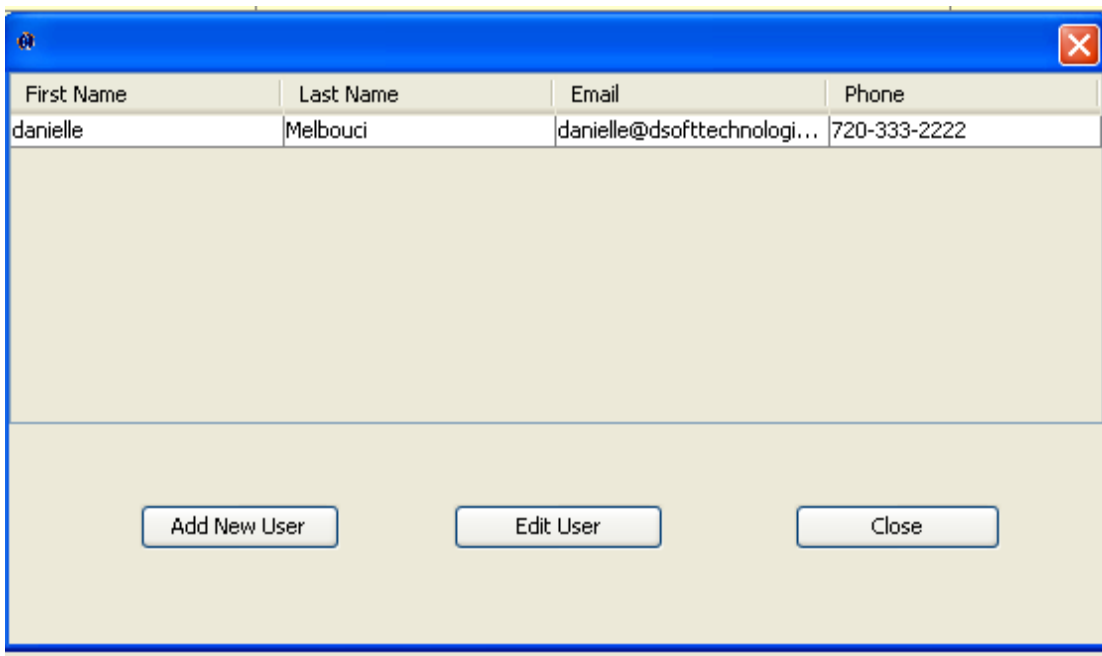
- Mental Health:
- PHYSICIAN: General Physician
- PSYCHIATRY: Mental Health
- TEST: TEST
- TEST2: TEST 2

Save Cancel

Enter the number in the box labeled **Diagnostic Code**. Fill in the description of that diagnostic code and highlight the correct Speciality. Then press **Save**

New User

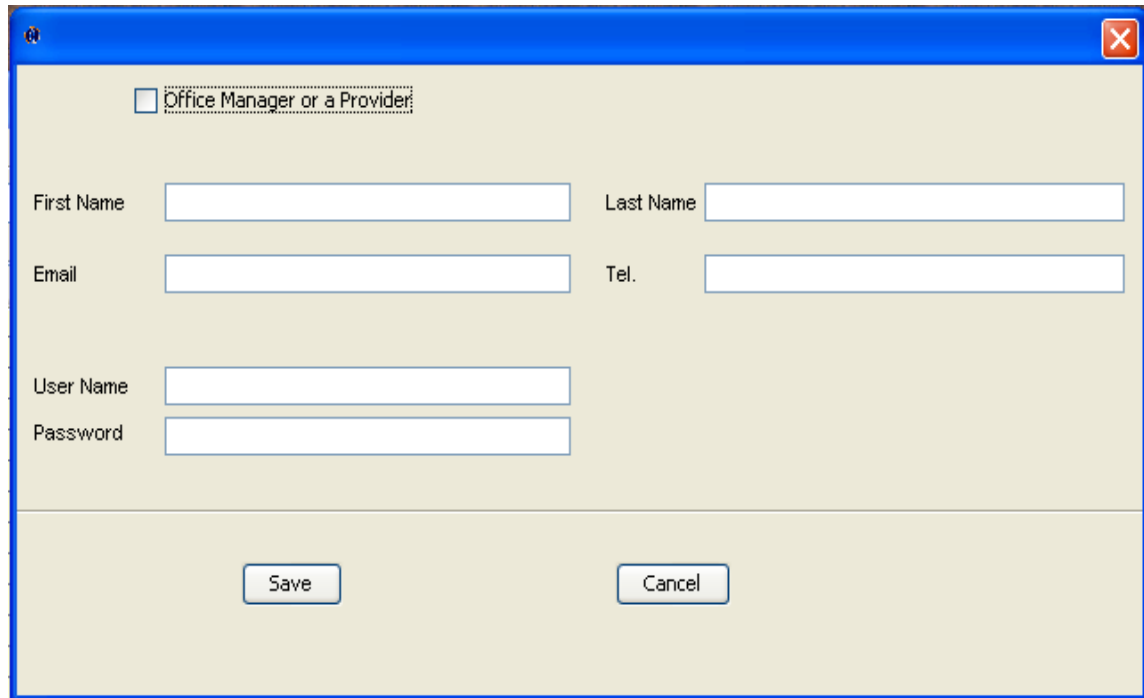
To add new users to this medical practice software, pull down the **Systems** Menu and click on **User Setup**.



First Name	Last Name	Email	Phone
danielle	Melbouci	danielle@dsofttechnologi...	720-333-2222

Buttons: Add New User, Edit User, Close

Then click on Add New User.



The screenshot shows a software window with a blue title bar and a close button (X) in the top right corner. The window contains a form with a light beige background. At the top left, there is a checkbox labeled "Office Manager or a Provider:". Below this, the form is organized into two columns. The left column contains labels for "First Name", "Email", "User Name", and "Password", each followed by a white text input field. The right column contains labels for "Last Name" and "Tel.", each followed by a white text input field. At the bottom of the form, there are two buttons: "Save" on the left and "Cancel" on the right.

Fill out the corresponding information and click **Save**. The user's first name, last name, emails and phone # should be listed in the table. Press **Close** to exit.

To edit user information in this patient management software, highlight the user information needing to be edited in the table. Once highlighted, click on **Edit User**, make the needed changes and then press **Save**. The changes should be reflected in the existing screen. Then press Close to exit the screen.

ALERTS Management

EZ MED PRO

System Options About Help

Select provider

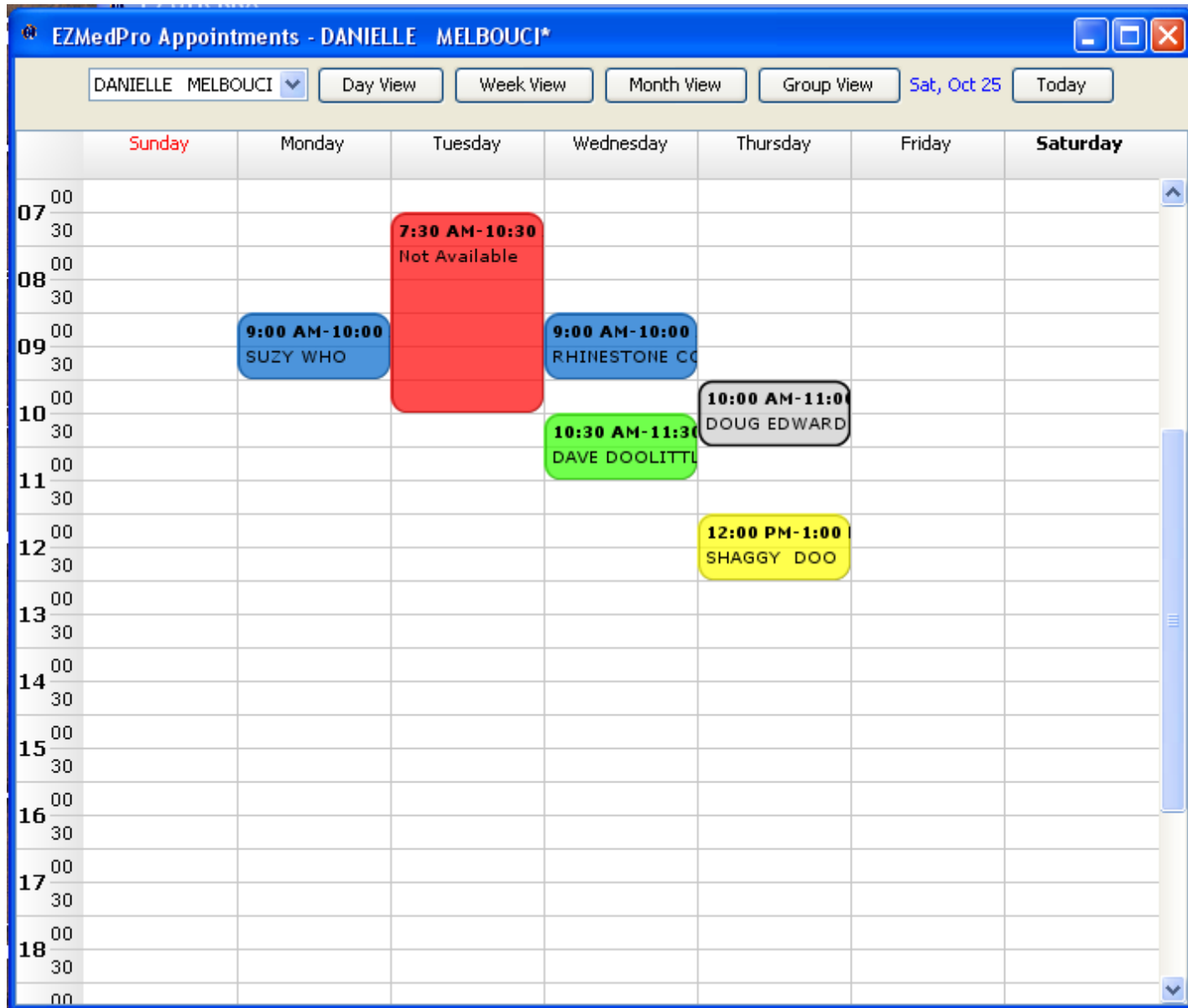
	Event Date	Description	Action
Alerts			
Patients	11/10/2007	DAVE DOOLITTLE has not been billed for the session on 11/10/2...	Go to Patient ta
Providers	11/10/2007		Go to Patient ta
Payers	11/10/2007	MERRY WAY has not been billed for the session on 09/10/2007	Go to Patient ta
Report	11/11/2007		Go to Patient ta
Billing	11/08/2007	SUZY WHO has not been billed for the session on 11/08/2007	Go to Patient ta
	11/23/2007	SLOW LEAK has not been billed for the session on 11/05/2007	Go to Patient ta
	11/23/2007	SLOW LEAK has not been billed for the session on 11/05/2007	Go to Patient ta
	10/23/2007	DOUG EDWARDS has not been billed for the session on 10/25/2007	Go to Patient ta
	11/01/2007	DOUG EDWARDS has not been billed for the session on 10/25/2007	Go to Patient ta
	11/23/2007	DOUG EDWARDS has not been billed for the session on 10/25/2007	Go to Patient ta
	11/15/2007	DOUG EDWARDS has not been billed for the session on 10/25/2007	Go to Patient ta
	11/26/2007	SLOW LEAK has not been billed for the session on 11/05/2007	Go to Patient ta
	12/09/2007	SLOW LEAK has not been billed for the session on 11/05/2007	Go to Patient ta
	12/06/2007	DOUG EDWARDS has not been billed for the session on 10/25/2007	Go to Patient ta
	08/28/2005	SHAGGY DOO has not been billed for the session on 08/28/2005	Go to Patient ta
	08/28/2005	SHAGGY DOO has not been billed for the session on 08/28/2005	Go to Patient ta
	10/13/2007	SHAGGY DOO has not been billed for the session on 08/28/2007	Go to Patient ta
	08/25/2007	LITTLE SISTER has not been billed for the session on 08/23/2007	Go to Patient ta
	08/30/2007	LITTLE SISTER has not been billed for the session on 08/23/2007	Go to Patient ta
	09/27/2007	ERIN LIST has not been billed for the session on 01/25/1998	Go to Patient ta
	10/11/2007	DAN LEE has not been billed for the session on 10/11/2007	Go to Patient ta

Once EzMedPro has started, Alerts will show up if there are unbilled accounts. In order to address these items, please go to the **Patient** tab; select the appropriate patient and bill. Once billed, click the refresh button to update the Alerts.

SCHEDULING

Appointment Scheduler

To start scheduling in this management software for healthcare, press the Appointment Scheduler button from any screen.



Double click on the time slot to and an Appointment Details Screen will show.

Use the SEARCH button to select an existing patient. For new patients, enter their details.

Session Scheduling Notes Recurring Appointment

Today: **Fri, Oct 24, 2008**

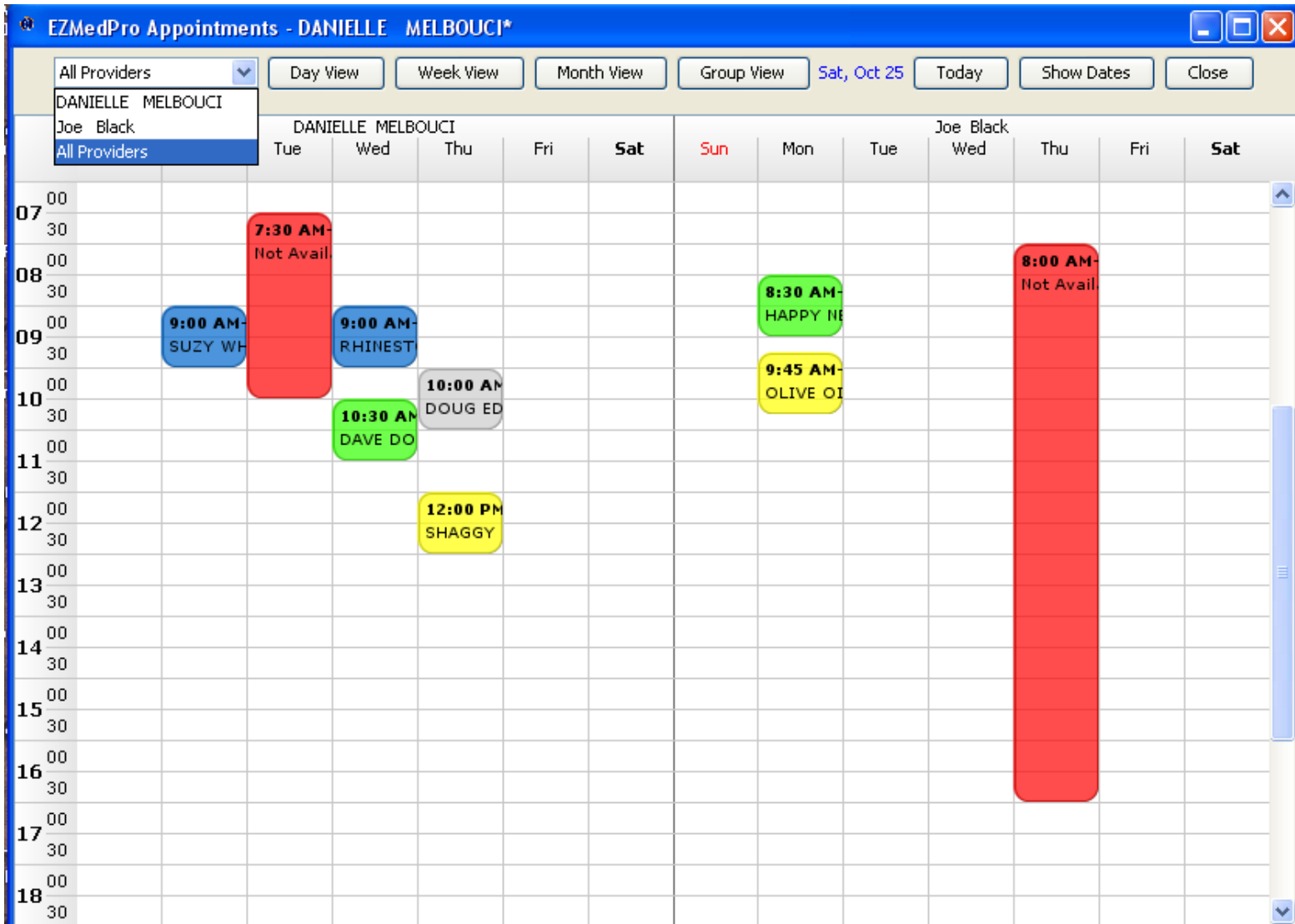
Patient
 Group

Start
 End

First Name
 Last Name
 Address
 City
 ZIP
 State
 Phone
 Cell

The user can view appointments in Day View, Week View, Month View, or Group View. Group View allows the user to see all providers in a weekly view format. This allows for easy and clear appointment scheduling.

The picture below show two providers on monthly view next to each other:



The Today button will automatically bring you back to today's date in this medical scheduling software. The Show Dates button will allow a monthly calendar to appear in the center of the screen. The user can use the Show Dates button to find any particular date by clicking the single arrow (month) or double arrow (year) buttons. Once the month and year are found, the user can then click on the day and the schedule will automatically go to that date and show it in whatever view you have selected.

To remove the calendar from the screen simply clicks the Hide Dates button. To create an appointment simply double click on the time preferred. A Session Scheduling screen will appear.

Populate all required fields and press schedule. This will save the appointment. The appointment will then show up on the schedule in blue.

To make this appointment reoccurring go to Reoccurring Appointment tab and select the frequency and either the Number of Times or Repeat Until button. Select the number of times the user wants the appointment to repeat or select a date for the date to *repeat until* to make this appointment occur until the selected date. If a patient confirms an appointment, double click on the appointment time and press the confirm button. This will change the appointment color to green. Repeat this for the Called, Cancelled, and No show buttons as well. Each button will change the appointment to a different color so that the appointments are color coded therefore the user can recognize what might be happening with a patient's appointment at a glance. The user can also left click on the appointment to accomplish the same functions.

Setting the Session Length

On the main page of this medical office software, main menu, go to options ---> **Global Options**

Round up start session by will round up the session length by number of minute specified.

For example, if the value is set to 15 Minutes, when you double click on the calendar, depending on the position of the mouse, the session can start at 9:00, 9:15, 9:30 or 9:45. You can always overwrite the start any time.

Session Length: Is the length of the visit per patient.

Round up start session by Min

Session Length Min

Check Alert every Min

Enable Login and User authentication

Save

Close

PATIENTS Management

Patient Details

New Patients

To enter a new patient into this mental health/medical practice software, simply click on the **Patient** tab. The patient information screen will pop up. If this screen is populated, please click the **New Patient** button in the left hand side of the screen to clear it. Then enter the information to populate the screen. **Please note** the social security and home telephone numbers must be filled out if you do not have one please enter a factious (000-00-0000) one so that you can continue to move down the screen.

If the patient is 18 years old or older, the **View Guardian** button will disappear.

The screenshot shows the EZ MED PRO software interface. At the top, there is a menu bar with 'System', 'Options', 'About', and 'Help'. Below the menu bar, there is a 'Select provider' dropdown menu set to 'DANIELLE MELBOUCI' and a button labeled 'Appointment Scheduler'. The main interface is divided into several sections. On the left, there is a sidebar with buttons for 'Alerts', 'Patients', 'Providers', 'Payers', 'Report', and 'Billing'. The 'Patients' section is active, showing a 'Patient Lookup' form with fields for 'First Name', 'Last Name', 'OR', 'SSN', and 'Account #', along with a 'Lookup' button. Below the lookup form is a list of patient names and dates of birth, with 'COWBOY RHINESTONE' highlighted. The main area contains a large form for patient details, including fields for 'FirstName', 'Middle', 'Last Name', 'Street', 'City', 'State', 'ZIP', 'DOB' (with dropdowns for year, month, and day), 'SS#', 'Home Tel.', 'Cell', 'Fax', 'Email', 'Marital Status', and 'Work Status'. There are also radio buttons for 'Male' and 'Female', and a checkbox for 'Email Reminder'. At the bottom of the form, there are buttons for 'View Guardian', 'Insurance Information', and 'Emergency Contact'. A 'Save' button and a 'Delete' button are located at the bottom center of the form area.

Guardian

If the patient is a minor please click on the **View Guardian** button and populated the screen with your data. You can then print out consent to treat that minor by pressing the **Print Form** button.

Conscent ✖

First Name Initial

Last Name

Date of Birth

Same Address as Patient

Address

City State

ZIP Code

Phone

Patient Insurance

If using insurance, please click the **Insurance Information** button. Click on **New Insurance** and the insurance information screen will pop up.

Please select the insurance name and status. **Please note** the insurance name is populated by pre-entering the insurance companies' information under the **Payers** tab from the main menu. Please search for the **Payers** tab heading in this document for more information. Then populate the rest of the screen. If the relation to the insured is self the insured street, city, telephone #, ss# will be automatically populated. Press save to secure data.

Insurance Information
✕

Insurance Name	<input type="text" value="Cigna"/>		
Relation To Insured	<input type="text" value="Self"/>	Status	<input type="text" value="Active Primary"/>
Insured ID Number	<input type="text"/>	Group Or FECA Number	<input type="text"/>
Insured First Name	<input type="text"/>	Middle	<input type="text"/>
DOB	<input type="text" value="2008"/> <input type="text" value="Oct"/> <input type="text" value="25"/>	Female <input checked="" type="radio"/>	Effective Date <input type="text" value="2008"/> <input type="text" value="Oct"/> <input type="text" value="25"/>
		Male <input type="radio"/>	
Insured Street	<input type="text"/>		
City	<input type="text"/>	ZIP	<input type="text"/>
Tel. Number	<input type="text"/>		
Employer/School Name	<input type="text"/>		
Plan	<input type="text"/>	Copay \$	<input type="text" value="35.00"/>

If a patient's insurance changes, click on the **Insurance Information** tab and then highlight the listed insurance that needs editing. Then click on **View Insurance** tab. The insurance information screen will pop up. Pull down the status menu and change from active primary to whatever change has occurred. Then save.

The screenshot shows the 'Insurance Information' window with the following fields and values:

- Insurance Name: Cigna
- Relation To Insured: Self
- Status: Active Primary
- Insured ID Number: (empty)
- Group Or FECA Number: (empty)
- Insured First Name: (empty)
- Middle: (empty)
- Insured Last name: (empty)
- DOB: 2008, Oct, 25
- Gender: Female (selected)
- Effective Date: 2008, Oct, 25

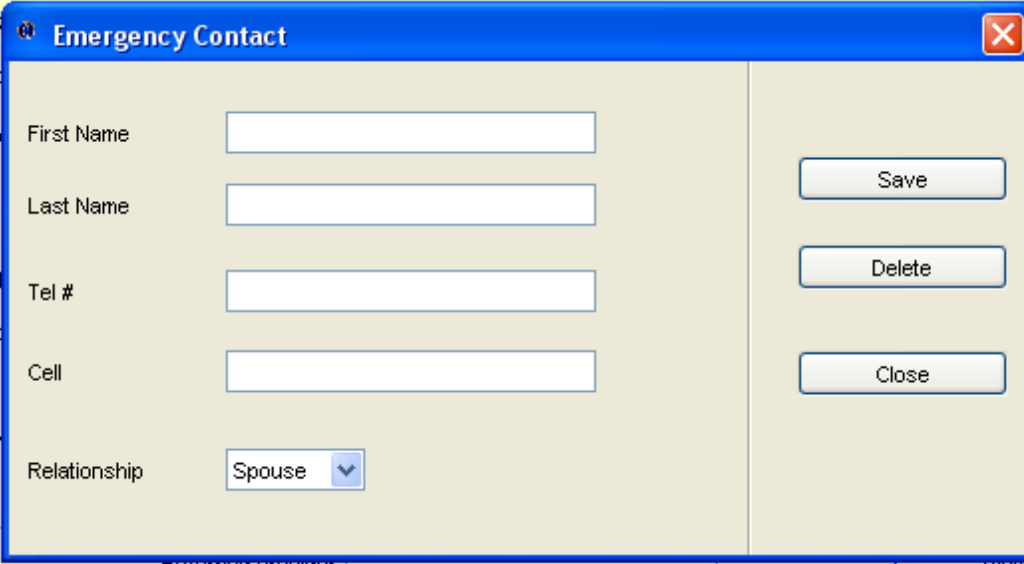
Below the form is a table with the following data:

Insurance Name	Status	Insurance Number
United Behavioral Health	Active Primary	813195107

At the bottom of the window are three buttons: 'New Insurance', 'View Insurance', and 'Close'.

Emergency Contact

Emergency Contact can be filled out by simply clicking on the **Emergency Contact** button and populating the screen with the information.



The screenshot shows a window titled "Emergency Contact" with a close button in the top right corner. The form contains the following fields and controls:

- First Name:
- Last Name:
- Tel #:
- Cell:
- Relationship: (dropdown menu)
- Save:
- Delete:
- Close:

Groups

Click on the Group button, and we can create a group and assign new patient to it:

Group Id	Group Name
1	GROUP THERAPY

Group Name

Select Customers

Add Current Patient To Group

Remove Patient From Group

Create New Group

Save Group

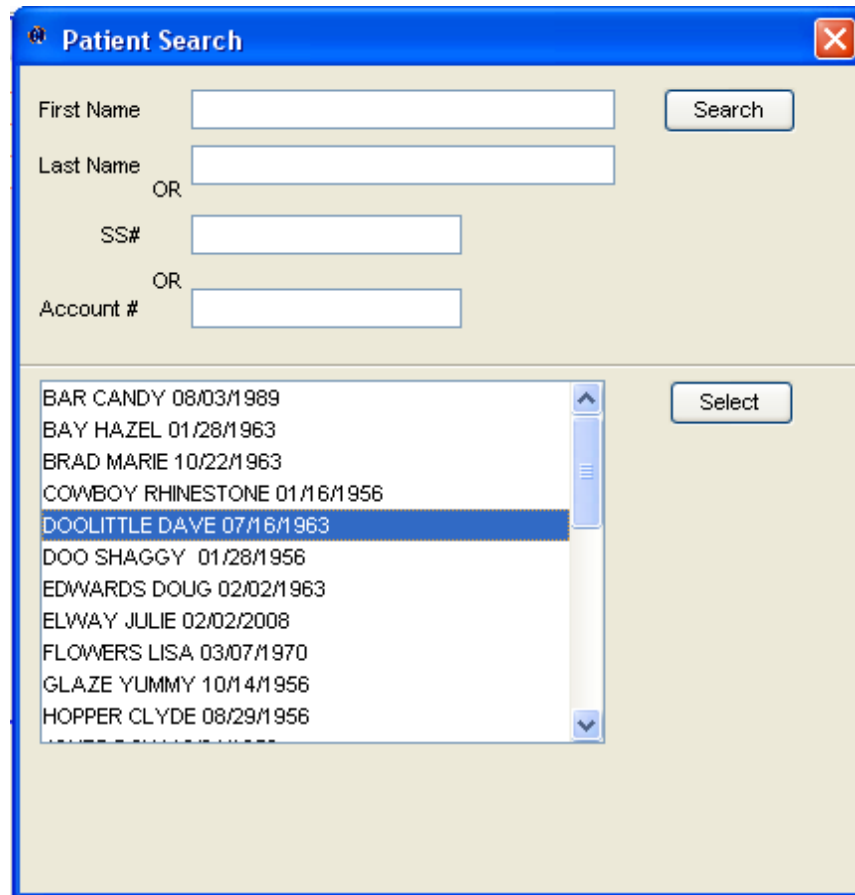
Delete Group

Close

Clinical Information Management

Click on Clinical Info Tab.

This easy to use medical management software allows the user to locate patients quickly within the system. If a patient has already been selected from the **Details** tab then the patients' name will be listed and ready to enter clinical data. If not please click the **Search** button and fill out the patients name or id # in the pop up menu.



First Name Search

Last Name

OR

SS#

OR

Account #

BAR CANDY 08/03/1989

BAY HAZEL 01/28/1963

BRAD MARIE 10/22/1963

COWBOY RHINESTONE 01/16/1956

DOOLITTLE DAVE 07/16/1963

DOO SHAGGY 01/28/1956

EDWARDS DOUG 02/02/1963

ELWAY JULIE 02/02/2008

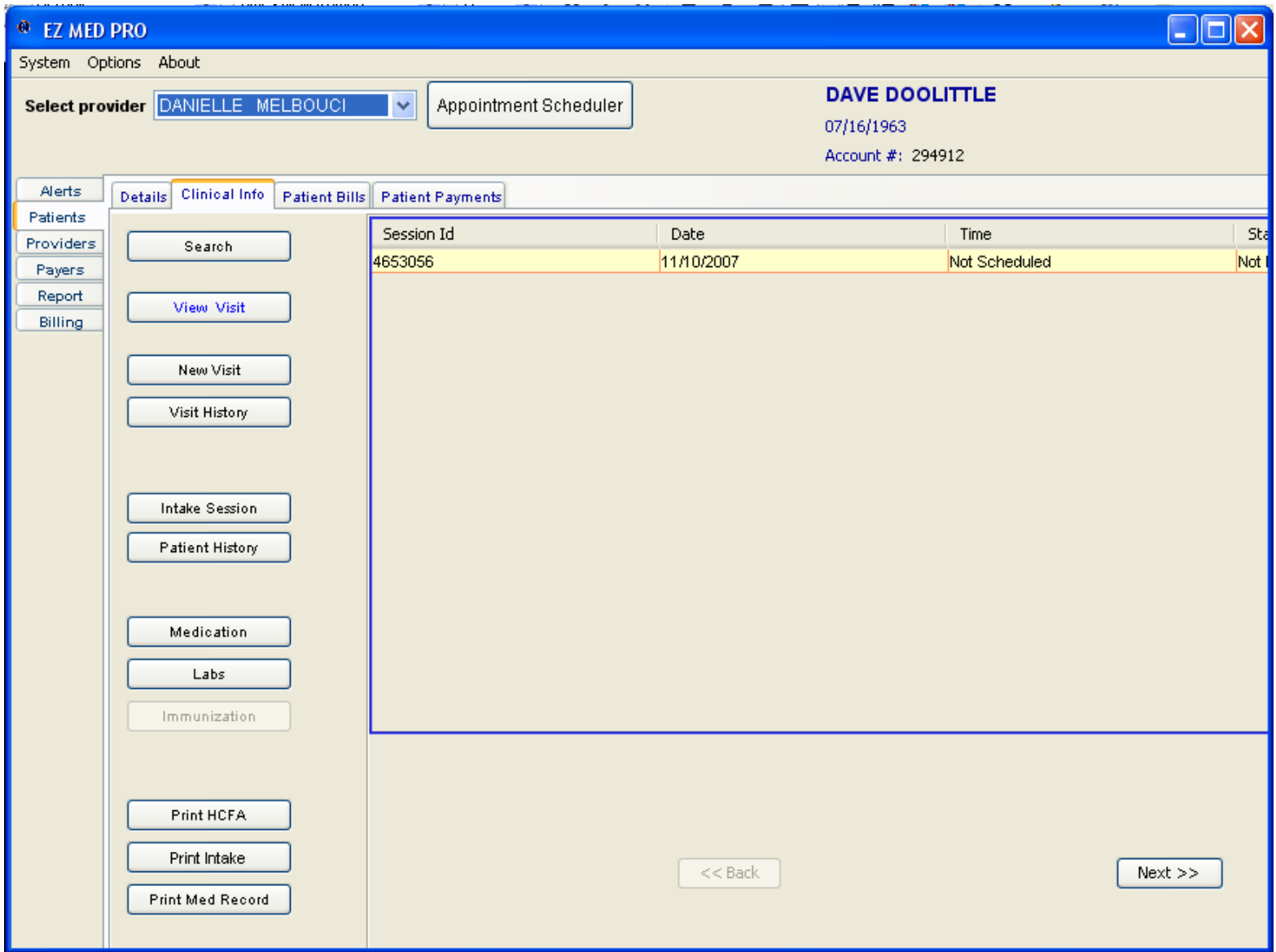
FLOWERS LISA 03/07/1970

GLAZE YUMMY 10/14/1956

HOPPER CLYDE 08/29/1956

Select

Once the patient's name is display on the screen, highlight it and press **Select**. The patient data is loaded and displayed on all the tabs.



The Session Id screen should then be populated with any prior clinical session entries. If the patient is new, then start by clicking the **New Visit Button**.

To create a new Visit, Click **New Visit**

To view previous visit Select by highlighting it and the press **View Visit**

To View the list of previous visits, press **Visit History**

New Visit

Click New Visit button.

Pregnancy or Illness/Injury Date	2007	Nov	10	<input type="checkbox"/> is Patient Unable to work	View Date				
First Symptom Date	2007	Nov	10	<input type="checkbox"/> Outside Labs	View Lab result				
Condition Related To	Other	<input type="checkbox"/> Patient Hospitalized			View Date				
Authorization #		Referring NPI							
MEDICAID Code		Referring Provider							
MEDICAID Orig Ref #		Local Use Auth #							
CPT and Diagnostic Codes	<table border="1"><thead><tr><th>CPT Code</th><th>Diagnostic</th></tr></thead><tbody><tr><td> </td><td> </td></tr></tbody></table> <p>Add Remove edit</p>					CPT Code	Diagnostic		
CPT Code	Diagnostic								
Save		Delete		Clinical Notes					

Please populate any data the needs to be used: Pregnancy or Illness/ Injury Date, First Symptom Date, Authorization #, Medicaid Code, etc. Some of this data will populate the HCFA form or used for Electronic claims.

Entering Procedure and Diagnostic

Press the **Add button** to add a Procedure. The Add Button is shown on the above picture.

The screenshot shows a software dialog box for entering medical data. It includes the following fields and options:

- Date Of Service From:** 2008, Oct, 25
- To:** 2008, Oct, 25
- Place Of Service:** Office
- Emergency:**
- CPT Code:**
 - 90801: Psychiatric diagnostic interview
 - 90802: Interactive psychiatric diagnosis
 - 90804: Individual psychotherapy, 20-
 - 90805: Individual psychotherapy, 20-
 - 90806: Individual psychotherapy, 45-
 - 90807: Individual psychotherapy, 45-
- Diagnostic Codes:**
 - 300.22: AGORAPHOBIA
 - 300.23: SOCIAL PHOBIA
 - 300.29: SPECIFIC PHOBIA
 - 300.3: OBSESSIVE-COMPULSIVE D/O
 - 300.6: DEPERSONALIZATION D/O
 - 300.7: BODY DYSMORPHIC D/O
- Number of Unit/Days:** 1
- Charge:** 40.00
- CPT Modifier:** (empty)
- Provider:** DANIELLE MELBOUCI

Buttons at the bottom: **Add To List** and **Cancel**.

Enter the appropriate **date of service**. The current date will automatically populate the screen unless changed as well as office for place of service.

Select the appropriate **CPT and Diagnostic Codes**. The amount charged entered in for the CPT code should populate the Charge field. The amount is set per CPT code. Main Many → System → CPT and Diagnostic Codes.

Please make sure everything else is correct.

If you wish to enter in dates of service from a certain date to a certain date click the **Top** box. To save and enter the information press **Add to List**.

The CPT and Diagnostic Code will then be listed in the corresponding box.

To add another procedure to the session, to be listed on the same HCFA form repeat the process again starting with the **Add** button.

Once all the sessions are entered for this bill **press SAVE button to secure the data**.

Now the Intial Intake or Clinical Notes can be entered simply by pressing the button at the bottom right hand corner of the screen. Please be aware that if this is the initial session the Intake Session button will appear at the bottom of the screen.

If it is the first visit for the patient, **Initial Session button** will appear otherwise **Clinical Notes** will appear. Patient and medical record management has never been easier.

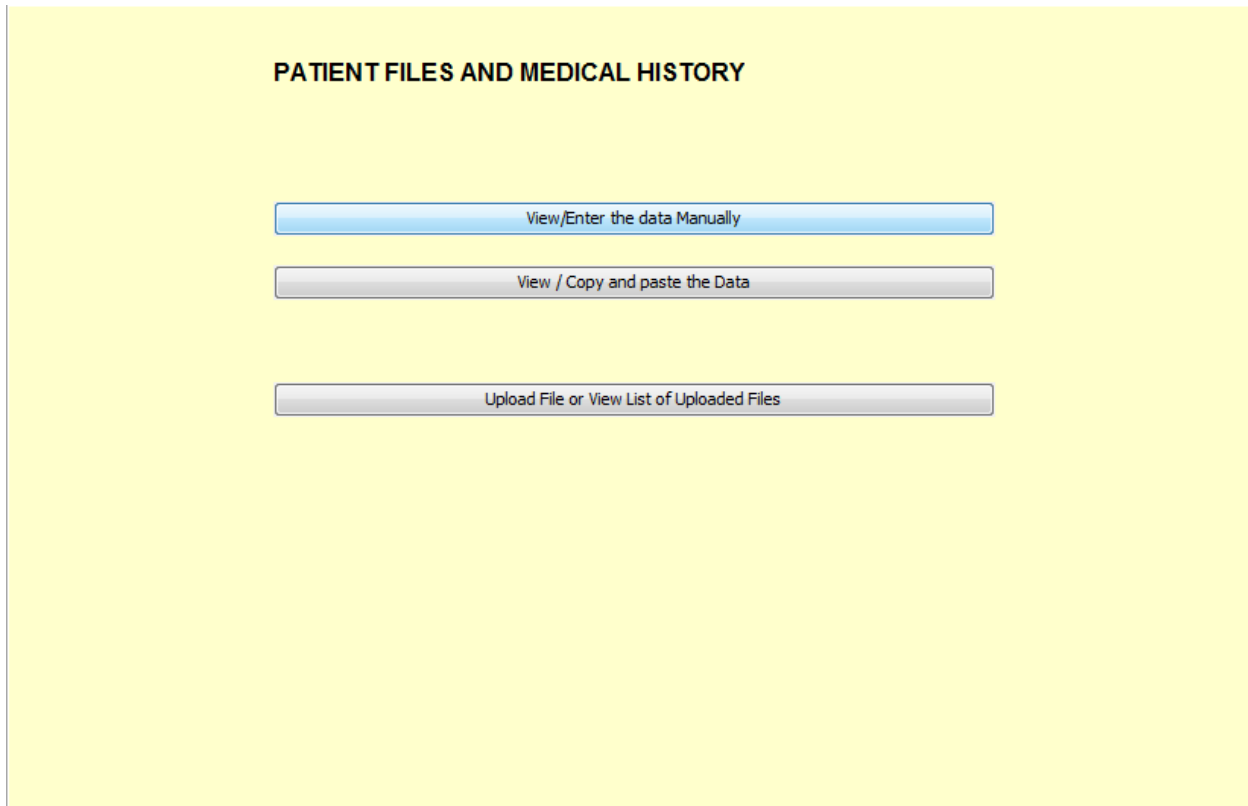
Intake Session

The Intake Session is the first patient session.

Patient History

Medical History of the patient, you can upload files if the patient provides a soft copy of it. You can copy and paste the information or entered it manually.

You can upload scanned files, PDF, Pictures, Xray pictures, and Word Documents.



Medication

This medical practice software allows the user to see all past and current prescriptions the patient has been on. To view the prescriptions or enter a new one simply click on **Medications** in the side bar menu and the window below will show on the right panel.

A window will pop up stating that no session was selected, do you want to view all the prescriptions for this patient?

Click yes and a screen will pop up showing all listed prescriptions.

Session Prescription

Show Prescription History

View Details

New Medication

Date	Medication	Dosage	Refill	Quantity
11/10/2007	XYZ	50mg per day	0	30

To add new Medication, Press **New Medication** button

The screenshot shows a software window titled "Session Prescription" with a red header bar. Below the header are two buttons: "Session Prescription" and "Show Prescription History". The main content area is a form titled "CUSTOMER NAME" with a blue border and a close button in the top right corner. The form contains the following elements:

- Date:** Three dropdown menus showing "2008", "Oct", and "25".
- Medication:** A text input field.
- Dosage:** A text input field.
- Quantity:** A text input field.
- Refill:** A spinner control showing "0".
- Description:** A large text area.
- Do Not substitute:** A checkbox.
- Buttons:** "Save", "Save and Print", "Delete", and "Cancel" are located at the bottom of the form.

To view details regarding a particular prescription, highlight the intended prescription and click **View Details**.

To view a specific session click **View History** and highlight the session you want to view, then click **Medication** in the side bar menu.

Print HCFA

This management software for healthcare allows the user to print a HCFA form by clicking **View History** and highlighting the intended session.

Then click the **Print HCFA** button. A HCFA form will pop up with populated fields to print. Press **Print** to print HCFA form or **Cancel** to discontinue.

The image shows a screenshot of a Health Insurance Claim Form (HCFA) for Oigna, P.O. Box 182225, Chattanooga, TN 37422-7225. The form is titled "HEALTH INSURANCE CLAIM FORM" and includes fields for patient information, insurance details, and provider information. The form is populated with data, including a patient name "LEAH, SLOW", a date of birth "10 11 1966", and a provider name "DEMER". The form also includes a section for "OTHER INSURANCE" and a section for "SIGNATURE ON FILE". The form is displayed in a window with a yellow title bar and a "PRINT" button.

Print Intake

This allows the Intake or Initial Session form to be printed.

Print Medical Record

This easy to use medical record management software allows the session notes to be printed. Please note that each time you click this button, all the clinical notes completed will be printed.

Patient Bills Tab

The patients bills tab in this medical billing software allows the user to have an overview an account including Total Charge, Total Adjustments, Total Received, Balance for a patient. It also includes details such as name, type, status, insurance, date, charge, adjustment, insurance payment, copay, payment and what's due on the account.

Details
Clinical Info
Patient Bills
Patient Payments

Patient Lookup

Print Invoice

Patient Statement

Total Charge	Total Adjustments	Total Received	Balance
50.0	0.0		50.00

Name	Type	Status	Insurance	Date	Charge	Adjustment	Ins Payt	Copay	Payt	Due
DOOLITTLE	Session	Not Billed	United Behavi...	11/10/2007	50.00	0.00	0.00	0.00	0.00	50.00

View a Bill

Patient Bills

Patient Unpaid Bills

Create Fee

Receive Payment

Back

Next

Patient Lookup

If a patient has been selected from the **Details** tab then the patients' name will be listed and ready to enter clinical data. If not please click the **Patient Lookup** button and fill out the patients name, social security # or id # in the pop up menu. Once the patient's name is display on the screen, highlight it and press **Select**.

View a Bill

Allows the user to view a particular session by highlighting the intended session and pressing the View a Bill button.

Print Invoice
Patient Statement

DAVE DOOLITTLE

Total Charge

Total Adjustments Apply Adjustment

Copay

Payment Status

Notes

Receive Payment

Save

Delete

Pay Source	Status	Amount Recvd	Payt Type	Date	Note
	Not Billed	0.00		11/10/2007	

Total Received for this session 0.00

Once on the Bill screen, the user can apply adjustments and record received payments. The user is also able to record notes on the account. The user is able to print an invoice for this particular session or a complete statement on the account from this screen.

Receiving Payments

The **Receive Payment** button allows the user to post received payments. This payment can be applied to a specific session by checking the show unpaid sessions box. Once the partially paid or unpaid session appear at the bottom of the screen, check the appropriate session to apply the payment to.

Enter the amount, the type of payment (cash, check or charge) and whether the payment is a copay, out of pocket payment or insurance payment.

If Insurance payment is selected, unpaid or partially paid sessions will appear at the bottom of the screen.

Please check the boxes the insurance payment applies to. This can also be done manually for copays and out of pocket payments by checking the box marked **Show Unpaid Sessions**.

Customer Name: DAVE DOOLITTLE

Date Received: 2008 Oct 25

Payment Type: Copay

Amount Received:

Cash
 Credit Card
 Check

Note:

Show Unpaid Sessions

Pay	Session #	Date	Status	Orig Amt	Adjustment	Due	CPT Code
<input checked="" type="checkbox"/>	4685824A,76	11/10/2007	Not Billed	50.00	0.00	50.00	90805

Buttons: Save, Delete, Cancel, Save And Print Receipt

Always save data in each screen.

Patient Bills

Patient Bills shows all the patient including the paid bills

Patient Unpaid Bills

This screen gives an overview of unpaid bills on the patient's account. Again **View a Bill** can be used here to open up a specific session to apply a payment or adjustment by highlighting the intended session and clicking the **View a Bill** button.

Create Fee

The Create Fee button in this medical billing software allows the user to create a fee, for example a no show charge, on the account. Go to Total Charge in the upper left hand corner and place the amount for charge. Then press save in the side bar menu on the right side of the screen.

Patient Payments

The **Patient Payments** tab gives an overview of all payments posted to a patient's account. The user can retrieve a patient's information by using Lookup Patient (see **Patient Lookup**). The user can review any posted payment by highlighting the payment and then clicking the **View Payment** button. The user can again use the Receive Payment button to post a payment and can print a receipt by highlighting the intended payment and clicking the **Print Receipt** button.

PROVIDERS TAB

This medical management software allows for multiple providers. The **Providers** tab allows the user to enter different providers.

The screenshot displays the EZ MED PRO software interface. At the top, there is a blue header bar with the text "EZ MED PRO". Below this, a menu bar contains "System", "Options", and "About". A "Select provider" dropdown menu is set to "DANIELLE MELBOUCI", and a button labeled "Appointment Scheduler" is visible. On the left side, a vertical sidebar contains several menu items: "Alerts", "Patients", "Providers" (which is circled in red), "Payers", "Report", and "Billing". The main area of the interface features a table with the following data:

		First Name	Last Name	Address
<input checked="" type="checkbox"/>		DANIELLE	MELBOUCI	3785 Grove St. Denver
<input checked="" type="checkbox"/>		Joe	Black	3785 Grove St. Denver

At the bottom of the interface, there are two buttons: "Add New Provider" and "Edit Provider".

To edit a providers' information please highlight the provider in the Provider List Panel and click Edit Provider, make the changes in the pop up screen and press save.

To add a new provider simply click on the Add New Provider.

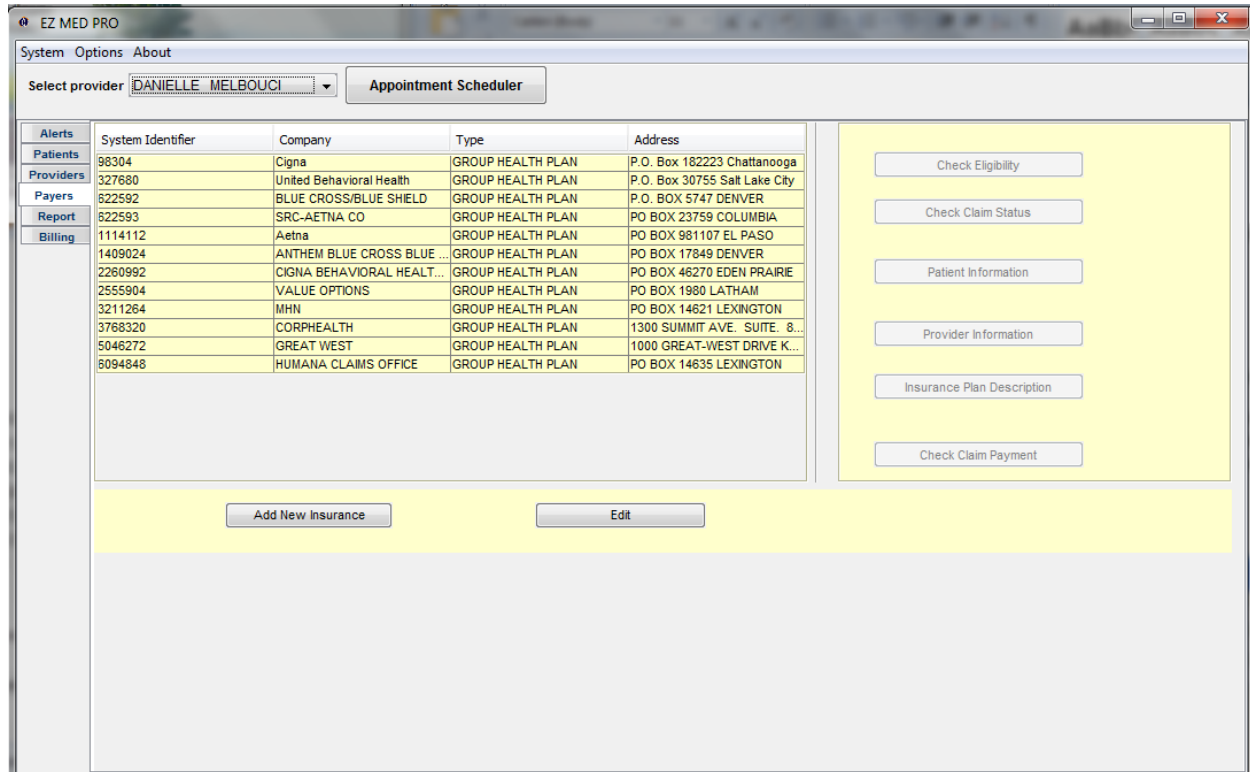
The screenshot shows a 'Provider Information' dialog box with the following fields and options:

- Practice: dropdown menu
- Provider First Name: text input
- Provider Initial: text input
- Provider Last Name: text input
- Street: text input
- City: text input
- State: text input
- ZIP Code: text input
- SS#: text input
- NPI: text input
- License #: text input
- Phone: text input
- Email: text input
- Taxonomy Code: text input
- Same address as the practice:
- MD: dropdown menu
- Provider Speciality: list box with options: Mental Health, General Physician, General Phy
- DEA #: text input
- Fax: text input
- Accept Medicare:
- Buttons: Save, Delete, Close

Fill out the above screen. Press save when completed.

PAYERS Management

This practice management software allows the user easy access to insurance information. The Payers Tab gives the user an overview of all the insurance companies entered into the software.



To Add new Insurance, click **Add New Insurance** button.

To Edit an Insurance Company, highlight the insurance you would like to edit and click **Edit** Button

Once clicked, a pop up screen will appear where the user can populate the insurance provider's information. Press **Save** once completed. This screen also allows for and Editing and Delete option. To Edit or Delete simply highlight the payer and then push the intended button. Remember to always save data once the information is edited.

Insurance Type	GROUP HEALTH PLAN	Payer Id	62308
Insurance Name	Cigna		
Address	P.O. Box 182223		
City	Chattanooga		
ZIP Code	37422-7223		
State	TN		
Customer Service Phone	800-244-6224		
Fax	570-496-2945		
Phone			
Email			
Web	www.cignabehavioral.com		
<input type="button" value="Save"/>			
<input type="button" value="Delete"/>			
<input type="button" value="Close"/>			

REPORTS

This management software for healthcare allows the user to generate a weekly, monthly, or daily revenue or calendar report by simply pressing the **Report** button. The **Billing Report** gives total copays, payments, adjustments, and session costs for any specified time. Simply apply specific dates in the left hand side bar menu, click on week, month or day and click the **Billing Report** button. A report will be generated.

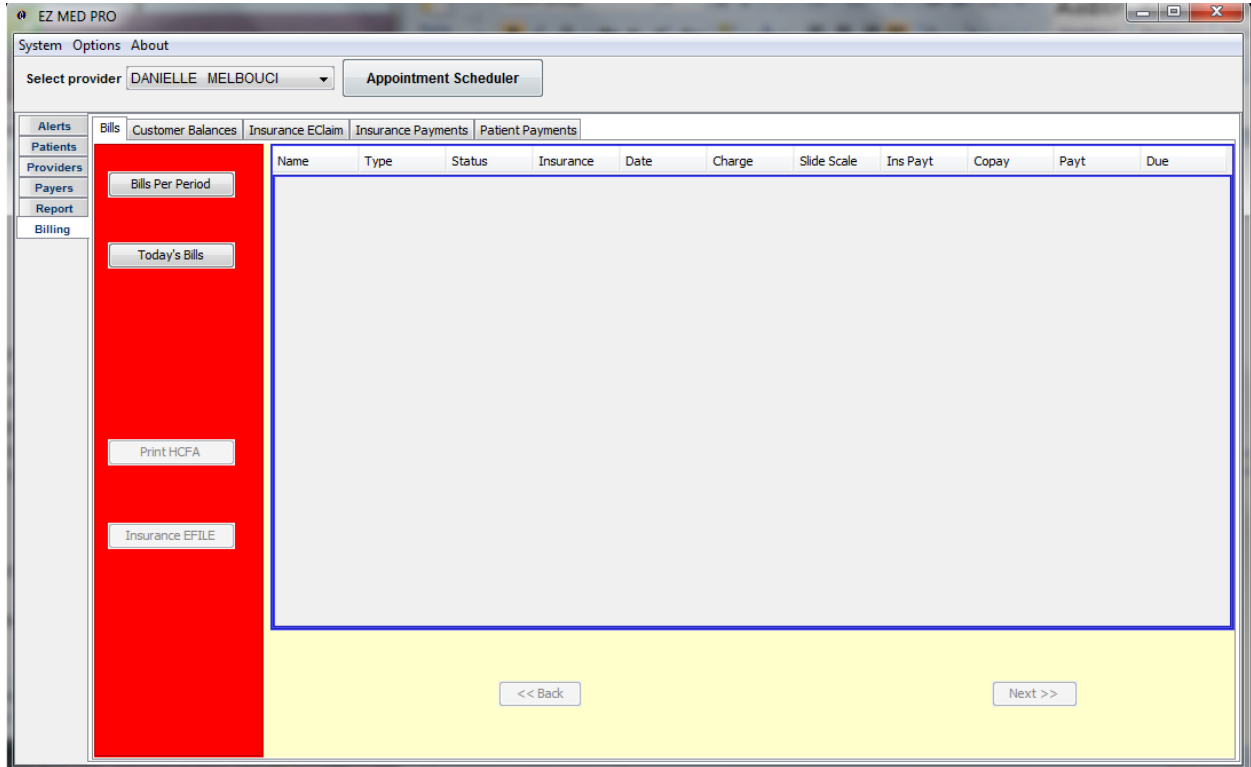
<input checked="" type="radio"/> Week <input type="radio"/> Month <input type="radio"/> Day					
Total Copays	Total Payments	Total Adjustments	Total Session cost		
250.0	354.4	0.0	10395.0		
From Date	To Date	# of Patients	Received	Expected	Adjustment
Sun Dec 31	Sat Jan 6				
Sun Jan 7	Sat Jan 13				
Sun Jan 14	Sat Jan 20				
Sun Jan 21	Sat Jan 27				
Sun Jan 28	Sat Feb 3				
Sun Feb 4	Sat Feb 10				
Sun Feb 11	Sat Feb 17				
Sun Feb 18	Sat Feb 24	0.0		960.0	0.0
Sun Feb 25	Sat Mar 3				
Sun Mar 4	Sat Mar 10	25.0		400.0	0.0
Sun Mar 11	Sat Mar 17				
Sun Mar 18	Sat Mar 24				
Sun Mar 25	Sat Mar 31				
Sun Apr 1	Sat Apr 7				
Sun Apr 8	Sat Apr 14				
Sun Apr 15	Sat Apr 21				
Sun Apr 22	Sat Apr 28				
Sun Apr 29	Sat May 5				

The **Calendar report** will generate the total number to appointments by week, month, or day using specified dates that can be adjusted in the left hand side bar menu. Simply chose the specific time frame (not exceeding 31 days) and chose week, month, or day and click **Calendar Report**. The scheduling report will show total appointments including total number of confirmed, new, and no show appointments.

<input checked="" type="radio"/> Week <input type="radio"/> Month <input type="radio"/> Day			
From Date	To Date	Status	Total Appts
Sun Aug 12	Sat Aug 18	NEW	1
Sun Aug 19	Sat Aug 25	CONFIRMED	7
Sun Aug 26	Sat Sep 1	CANCELED	1
		CONFIRMED	3
		NEW	6
Sun Sep 2	Sat Sep 8	CANCELED	1
		CONFIRMED	4
		NEW	3
Sun Sep 9	Sat Sep 15	CANCELED	2

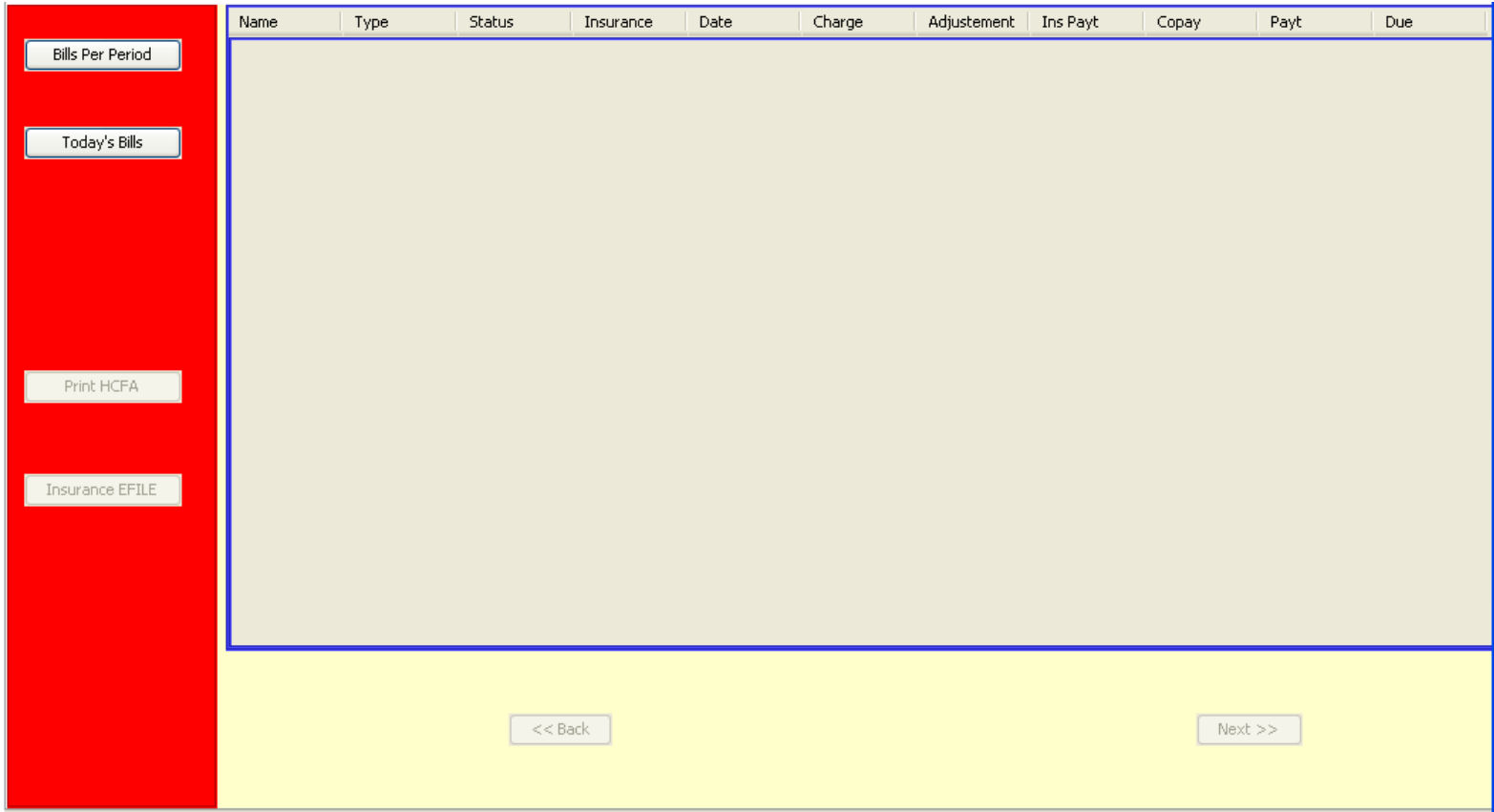
Total Appointments: **196**

Medical BILLING



Current Bills

This practice management software allows for easy billing overview and access.



Bills Per Period

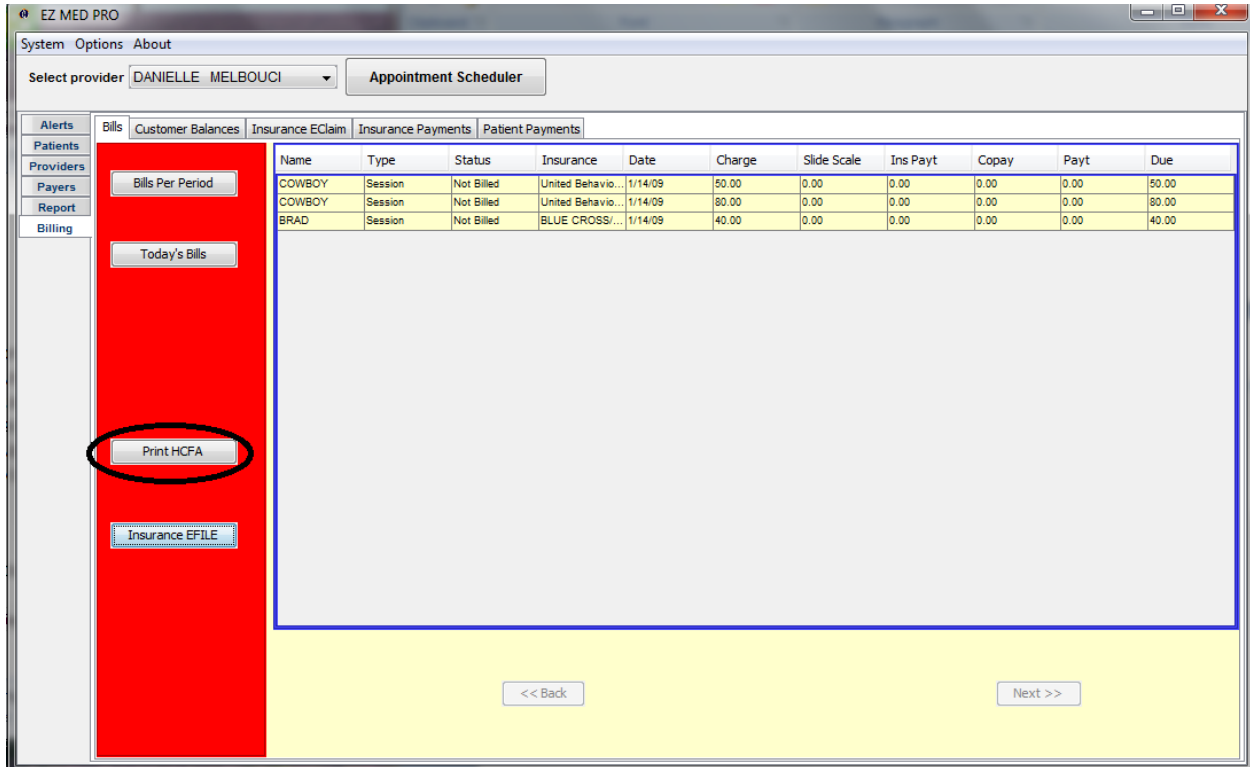
Bills Per Period button allows the user to see all unpaid bills during a certain time frame. Simply click on the **Bills Per Period** button and enter the dates for the time frame needed and push Retrieve. A table will follow showing name, type, status, etc.

Today's Bills

Today's Bills button allows the user to see all unpaid bills for the current day.

Print HCFA

Click Print HCFA form button:



This medical billing software allows the user to print any claim. Simply highlight the desired bill and click the **Print HCFA** button.

If no claim is highlighted, all the claims will be printed.

Electronic Claims

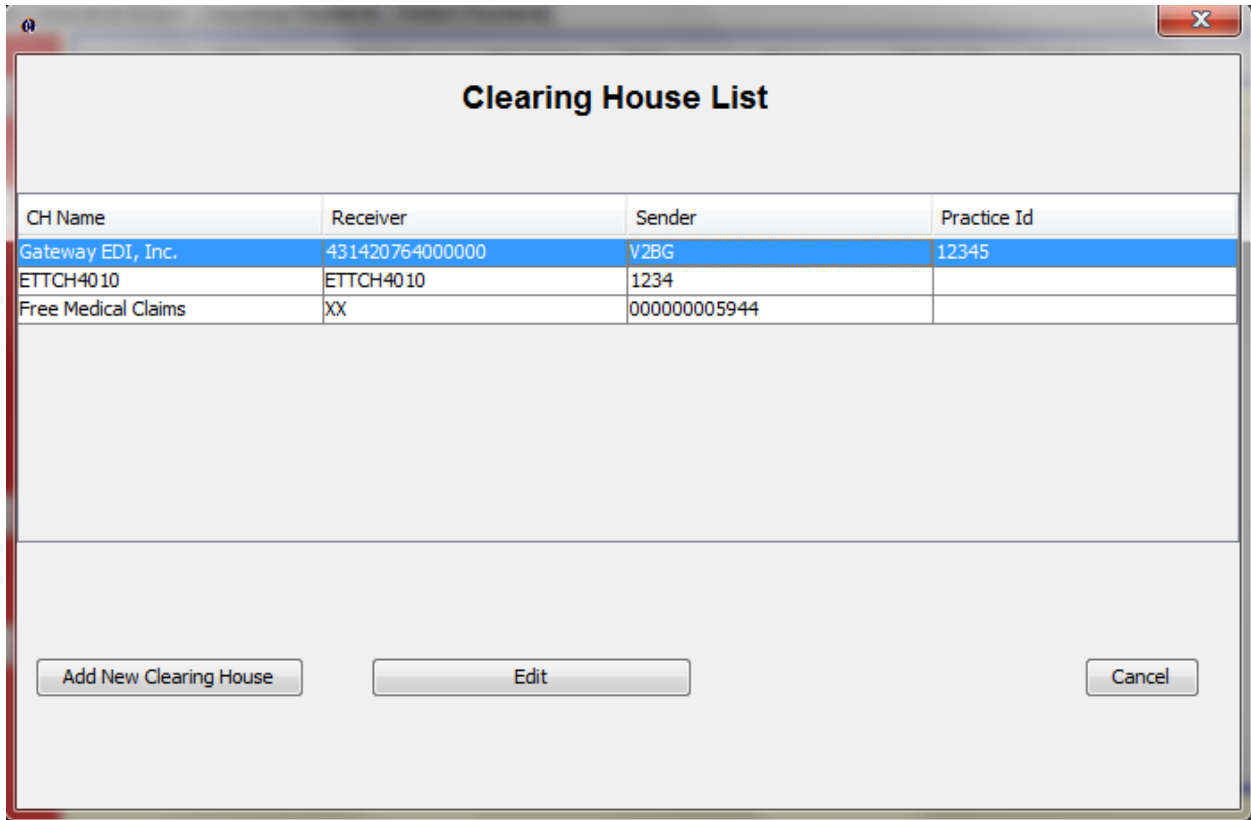
Setup clearing house

Click on Option and then Clearing House.

The screenshot shows the EZ MED PRO software interface. The left sidebar contains a menu with the following items: System, Options, About, Select, Alerts, Patient, Provider, Payer, Report, and Billing. The 'Options' menu is expanded, showing sub-items: Global Options, Billing Options, Email Options, Server Setup, and Clearing House. The 'Clearing House' option is highlighted with a red box. The main window displays a table of insurance claims with the following data:

Name	Type	Status	Insurance	Date	Charge	Slide Scale	Ins Payt	Copay	Payt	Due
COWBOY	Session	Not Billed	United Behavio...	1/14/09	50.00	0.00	0.00	0.00	0.00	50.00
COWBOY	Session	Not Billed	United Behavio...	1/14/09	80.00	0.00	0.00	0.00	0.00	80.00
BRAD	Session	Not Billed	BLUE CROSS/...	1/14/09	40.00	0.00	0.00	0.00	0.00	40.00

Below the table, there are buttons for 'Today's Bills', 'Print HCFA', and 'Insurance EFILE'. At the bottom of the window, there are '<< Back' and 'Next >>' navigation buttons.



Choose one recommended clearing house from DSOFT SYSTEMS or you can create a new one.

Highlight one clearing house and click Edit.

HIPAA TRANSACTION SETTINGS

Practice Number (Loop 1000A NM108)

Interchange Sender Identifier (ISA06)

Interchange Receiver Identifier (ISA08)

Sender Code (GS02)

Receiving Application Code (GS03)

Clearing House or Receiver Name (Loop 1000B)

Receiver Primary Id (Loop 1000B)

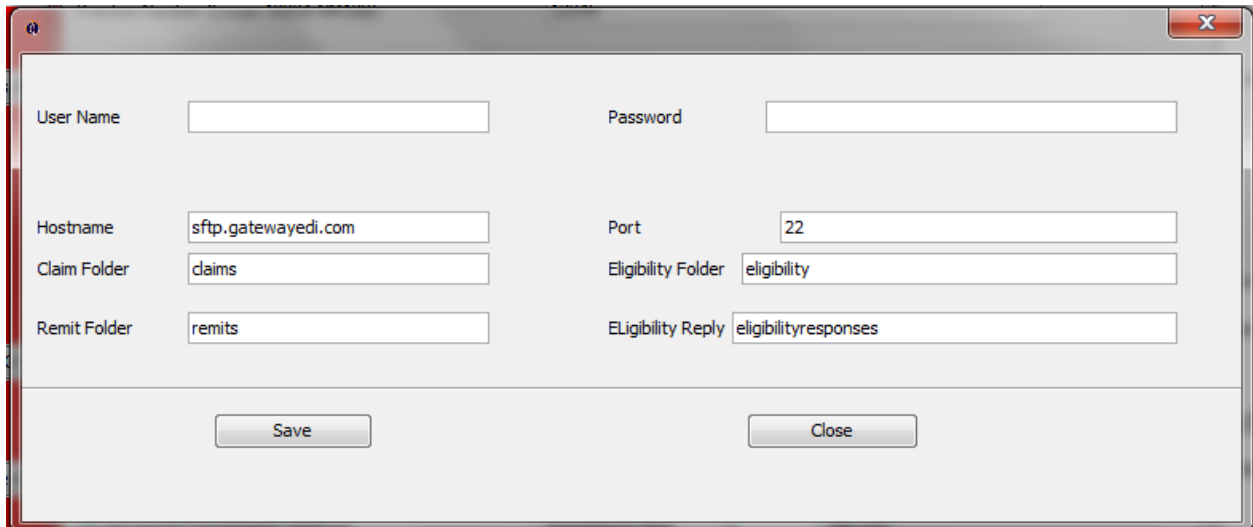
Set As Default Clearing House
 Production Flag

Advanced Transmission Settings Remittance Time Minutes

DSOFT SYSTEMS will provide you with **Practice Number**. Enter the number into the field "Practice Number Loop 1000A NM108".

Setup to Automatic Claim

In order to send automatically the file to the insurance companies through DSOFT SYSTEMS partners, check the box "Advanced Transmission Settings". The window below will appear to setup the username and password.



The screenshot shows a configuration window with the following fields and values:

Field	Value
User Name	
Password	
Hostname	sftp.gatewayedi.com
Port	22
Claim Folder	claims
Eligibility Folder	eligibility
Remit Folder	remits
Eligibility Reply	eligibilityresponses

Buttons: Save, Close

The username and password will be provided to you by DSOFT SYSTEMS.

Enter the User Name and Password and click **Save**

Setup the frequency to check for claim status

It is recommended to check for the status of the claims every 4 hours (240 minutes).

Enter 240 in the test area of Remittance Time highlight below.

HIPAA TRANSACTION SETTINGS

Practice Number (Loop 1000A NM108)

Interchange Sender Identifier (ISA06)

Interchange Receiver Identifier (ISA08)

Sender Code (GS02)

Receiving Application Code (GS03)

Clearing House or Receiver Name (Loop 1000B)

Receiver Primary Id (Loop 1000B)

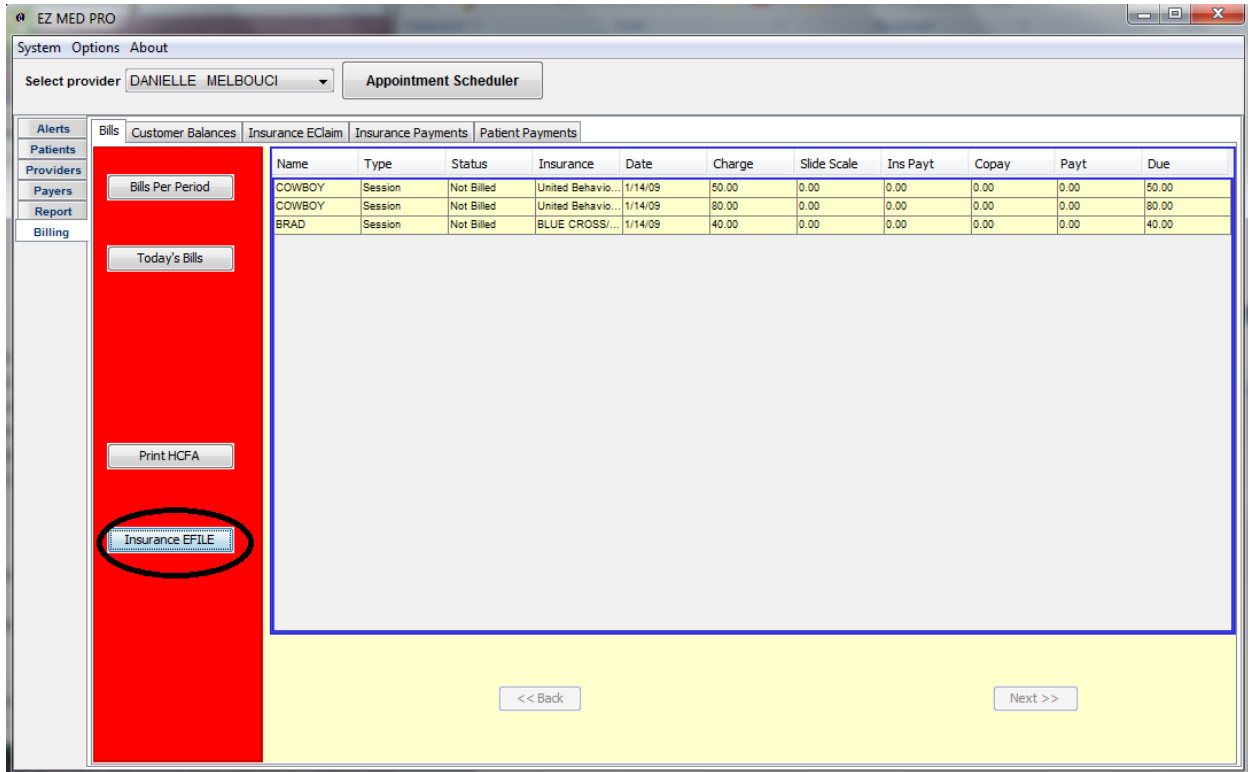
Set As Default Clearing House
 Production Flag

Advanced Transmission Settings

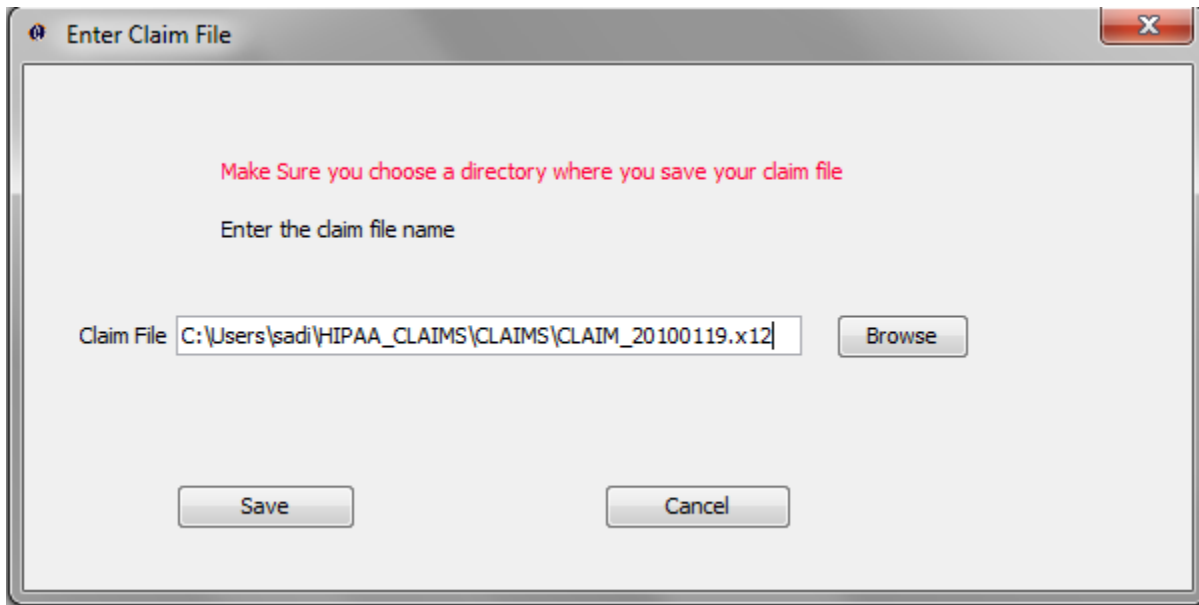
Remittance Time Minutes

Generate Claim File

Click on **Insurance EFile** button.

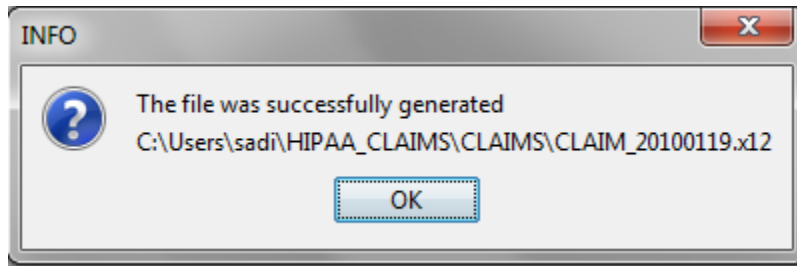


A window to validate the claim file will appear/ You can change the file location and name.



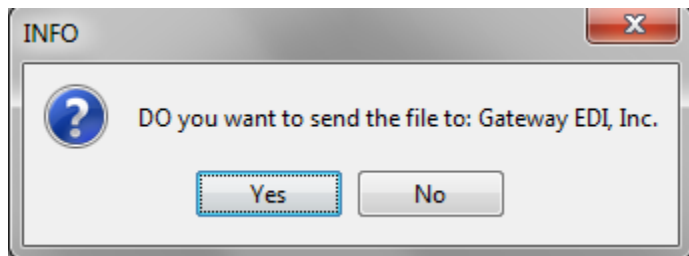
Click **Save**.

Confirmation that the file was generated.



Automatic Claim Filing

Click OK after the file was successfully created. To send the claims automatically through DSOFT SYSTEMS and its partners, Click "Yes".



Customer Balances

This healthcare practice software allows the user to view all accounts and current balances. Those accounts in white have zero balances. The accounts in green are overpaid and the accounts in red owe money.

Account #	LastName , FirstName	Balance
851969	TIGHT , UP	400.00
2097157	WAY , MERRY	40.00
1769473	WHIP , MIRACLE	720.00
5013504	WHO , SUZY	100.00

View Customer Bill

View Customer Bill button will take the user into a patient's billing account screen by highlighting the intended patient and clicking the button. To return here simply go to the BILLING tab and then to the Customer Balances tab.

Account #	LastName , FirstName	Balance
351969	TIGHT , UP	400.00
2097157	WAY , MERRY	0.00
1769473	WHIP , MIRACLE	240.00
5013504	WHO , SUZY	100.00

View Customer Payments

View Customer Payments button will take the user into a patient’s payment screen by highlighting the intended patient and clicking the button. To return here simply do to the BILLING tab and then to the Customer Balances tab.

View Customer Bill

This option shows the customer Bill.

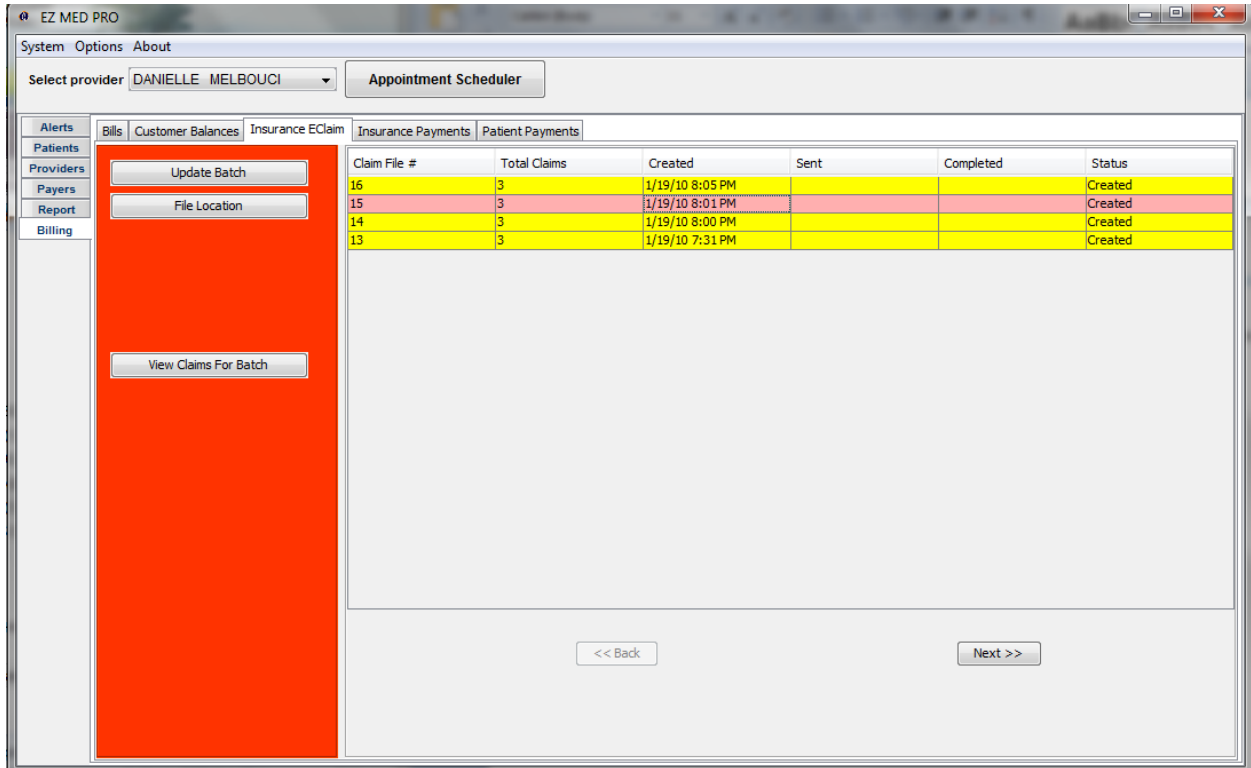
<div style="display: flex; justify-content: space-between; align-items: center;"> Print Invoice Patient Statement </div>										
Total Charge		Total Adjustments		Total Received		Balance				
40.0		0.0		40.00		0.00				
Name	Type	Status	Insurance	Date	Charge	Adjustment	Ins Payt	Copay	Payt	Due
WAY	Session	Not Billed	Cigna	11/10/2007	40.00	0.00	0.00	0.00	0.00	40.00
WAY	Session	Not Billed	Cigna	11/11/2007	0.00	0.00	0.00	0.00	0.00	0.00

This affordable and easy to use practice management software is appropriate for medical, family, mental health, chiropractic, and nursing practices. It provides user friendly ways to manage appointments scheduling, electronic medical records, HCFA forms, patient/case management, and

scheduling and billing reports. Thank you for choosing Ezmedpro and manage your healthcare practice with excellence.

Insurance Claims

Click on Insurance EClaim to view all the batch claims that were sent.



Insurance Payments

The Insurance Payments show the insurance payments.

System Options About

Select provider: Danielle Melbouci Appointment Scheduler

Alerts Bills Customer Balances Insurance EClaim Insurance Payments Patient Payments

Payer	Date	Total Paid	Total Adjustm...	PaymentMet...	Number	Total Claims
DISNEY BENEFITS INCORPORATED	2002-10-01	2438.2	1173.25	FWT	0124326845	4

<< Back View Special Adjustments Next >>

Customer Payments

To view the customer payments, Click on Customer Payment Tab.

There are 25 rows per page. Click next to see more payment.

System Options About

Select provider: DANIELLE MELBOUCI Appointment Scheduler

Alerts Patients Providers Payers Report Billing

Name	Date	Payment Type	Payment Amount
SAM RUN	2009-12-12	Out Of Pocket	65.0
SAM RUN	2009-12-12	Copay	25.0
DOW JONES	2009-12-12	Copay	25.0
DAVE DOOLITTLE	2009-12-12	Copay	25.0
DAVE DOOLITTLE	2009-12-12	Copay	25.0
DOUG EDWARDS	2009-12-12	Copay	25.0
RHINESTONE COWBOY	2009-11-28	Out Of Pocket	80.0
HAZEL BAY	2009-01-14	Out Of Pocket	80.0
HAZEL BAY	2009-01-14	Out Of Pocket	10.0
HAZEL BAY	2009-01-13	Copay	30.0
HAZEL BAY	2009-01-13	Insurance	40.0
HAZEL BAY	2009-01-13	Copay	80.0
CANDY BAR	2009-01-12	Copay	100.0
ROAD KILL	2009-01-12	Out Of Pocket	80.0
MARIE BRAD	2008-11-12	Insurance	50.0
MARIE BRAD	2008-11-12	Copay	30.0
MARIE BRAD	2008-11-11	Copay	15.0
RHONDA MCSTEAM	2008-10-26	Out Of Pocket	80.0
MERRY WAY	2008-10-25	Out Of Pocket	40.0
MIRACLE WHIP	2008-10-25	Copay	480.0
DAVE DOOLITTLE	2008-10-25	Copay	50.0

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