Clinical Services –
Medical Insurance Claims

User's Manual

Clinical Services – Medical Insurance Claims

Health District Information System
HDIS (Windows Ver. 4.0)

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Introduction

This program is designed to assist you in organizing a systematic approach to entering insurance claims and provides accurate up-to-date records within your health department.

Please review the manual carefully to obtain the maximum benefits. **Little or no prior computer experience is necessary to operate this program.**

About This Manual

Clinical Services Module **is simple to use.** *The maximum benefit with the least time spent will be obtained if you start at the first page of this manual and follow the directions exactly as you enter the first record in your computer.*

Square boxes in this manual surround the key that you are to press on your keyboard. As an example, when you read ⬜ ENTER ⬜ , press the **enter** key on your keyboard.

The word
TYPE is followed by bracketed **[   ]** instructions of what to type into a field.

Note: For Technical Support, email: helpdesk@hdis.org

Navigation

Whenever you see one   🖱   click the left side of your mouse once.

Whenever you see two   🖱   click the left side of your mouse twice.

Navigation Keys For Entering Information

| **Tab** | or | **ENTER** | to move to next field

| **Shift** | | **Tab** | or | **Up** | to go back one field

| **Alt** | + | **R** | places you in the receipt screen.

Editing Keys

Backspace   deletes one character left of cursor   **Delete**

deletes one character

Insert   inserting & overwriting modes

When you see a pull-down field, click the arrow to the right to view all your choices.

> CLEVELAND ▼

Starting HDIS

MICROSOFT Windows Users

> **Start**
>
> **Programs**
>
> **Health District Info Systems**
>
> **HDIS**

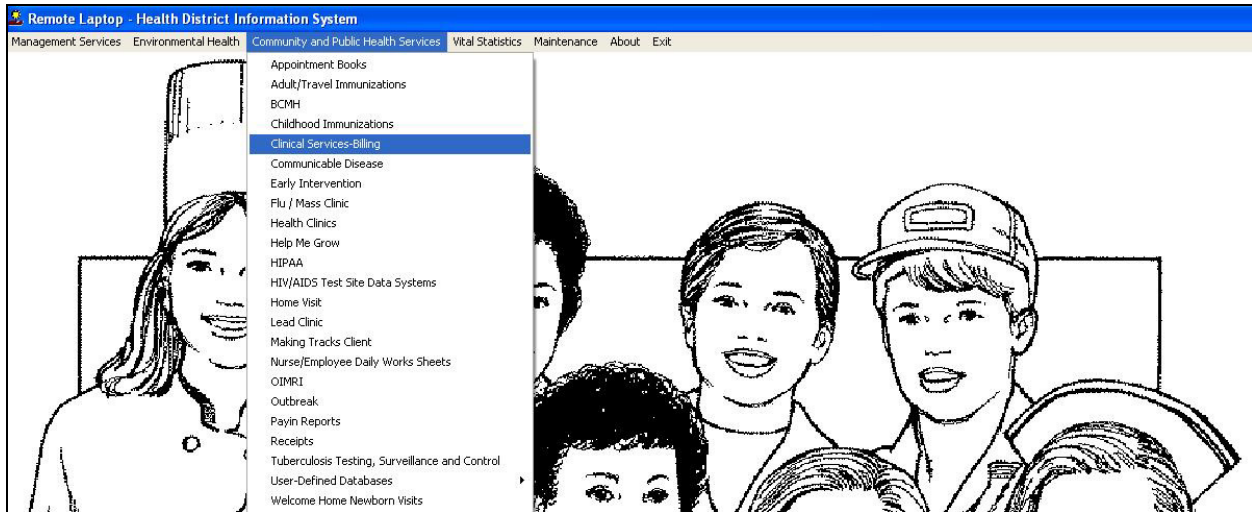# Health District Information System Menu Bar

HDIS (Health District Information System) has several different modules designed to assist your health district in its day-to-day operations. The **Clinical Services Module** is a great addition to these modules and simplifies your record keeping, billing and information management needs.
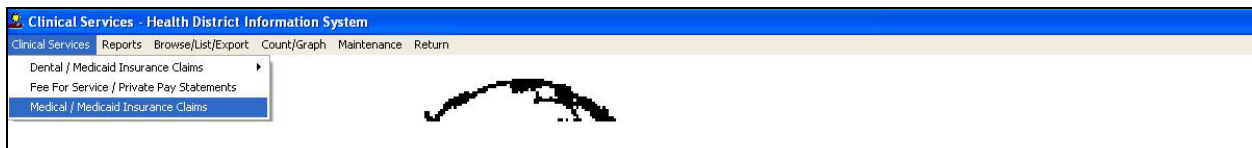
Select Community & Public Health

Select Clinical Services - Billing

Medical/Medicaid Insurance Claims

Finding a Client

To find an existing client, enter the name (**last, first, middle**) and press the "**Enter**" key. The program will automatically find the name in the database if present. If the client's name is not in the list, you will then enter it in the database.

Radio Button	Description
by Name	Click to find a client by name
By SSN #	Click to find a client by SSN #
By Date of Birth	Click to find a client by date of birth
Add Name	Click to add a new client
Defaults	Click to open the Defaults window (discussed further on)
Close	Click to exit

Add Name

Enter the demographic information for the client.

 Parent (if applicable)

Enter information regarding the parents/guardians.

Insurance/HIPAA

Enter information regarding the insurance carrier and HIPAA information.

* An insurance carrier and Insurance # is mandatory.

🐜 Other Info

When you are finished entering the client's demographic data, click the "**OK**" button to move to the "**HCFA 1500**" tab of the Clinical Services windows.

HCFA 1500 - Top

To add a HCFA 1500 claim, click the "**Add Claim**" button.

🐜 **Add Claim**

Demographic information, entered previously, automatically fills in HCFA 1500 fields. Enter any additional information as required.

Field/Button	Description
Previous	Previous Claim (if more than one for this client)
Next	Next Claim (if more than one for this client)
Delete Button	Delete a claim
Add Claim Button	Adds a claim
Print Button	Opens the Print window
Modify Button	Click to modify the record

HCFA 1500 - Middle

Enter additional information as required. ICD9 codes will be automatically filled in once you enter a CPT code. You may have to select another ICD9 code for a particular service.

Field/Button	Description
Previous	Previous Claim (if more than one for this client)
Next	Next Claim (if more than one for this client)
Print Button	Opens the Print window
Modify Button	Click to modify the record

HCFA 1500 - Bottom

To add charges for the client, enter the "**From**" date (the **"To Date"** will populate automatically, for the charge and select the "**CPT Code**" and "**Program**", then click the "**Add Charge**" button.

🐵 Add Additional Charges

The charge you entered is now moved into the grid after clicking the "**Add Charge**" button. Continue adding all of the charges for the client and other required information on the HCFA 1500.

Field/Button	Description
Previous	Previous Claim (if more than one for this client)
Next	Next Claim (if more than one for this client)
Transfer to Fee For Service	Click to transfer the claim to the Fee For Service program
Refresh Total	Click to refresh the total charge on the HCFA
Delete Charge*	Right click to delete a charge from the grid
Print Button	Opens the Print window
Modify Button	Click to modify the record

Comments

 Comments

You are able to enter unlimited comments regarding the client.

Default Button

 Default Button

The Default button allows you to pre-enter information that you consistently would have to fill out for the majority of the clients for whom you submit claims. When you add a claim, the information from the **"Default"** window is automatically copied to that new claim for each client.

Print Button

 Print

Print: The print button is available on all the window tabs. The print menu is the same, and you may print any of the options no matter what tab you have open at the time.

Print Options

Field/Button	Description
HCFA 1500 – Primary Insurance Carrier	Prints HCFA 1500 to the primary insurance carrier
HCFA 1500 – Secondary Insurance Carrier	Prints HCFA 1500 to the secondary insurance carrier
Envelope to Insurance Carrier	Prints an envelope addressed to the insurance carrier
Envelope to Patient	Prints an envelope addressed to the patient
All Claims/All Charges	Prints a history of claims for the patient
Routing Slip/Super Bill	Prints routing slip/super bill. Check which categories you would like to have on the routing slip
Demographic Info	Prints patient's demographic information
Blank Routing Slip/Super Bill	Prints blank routing slip/super bill
Blank Demographic Info	Prints blank demographic info form
Print	Prints the report
Preview	Previews the report

Reports

Reports
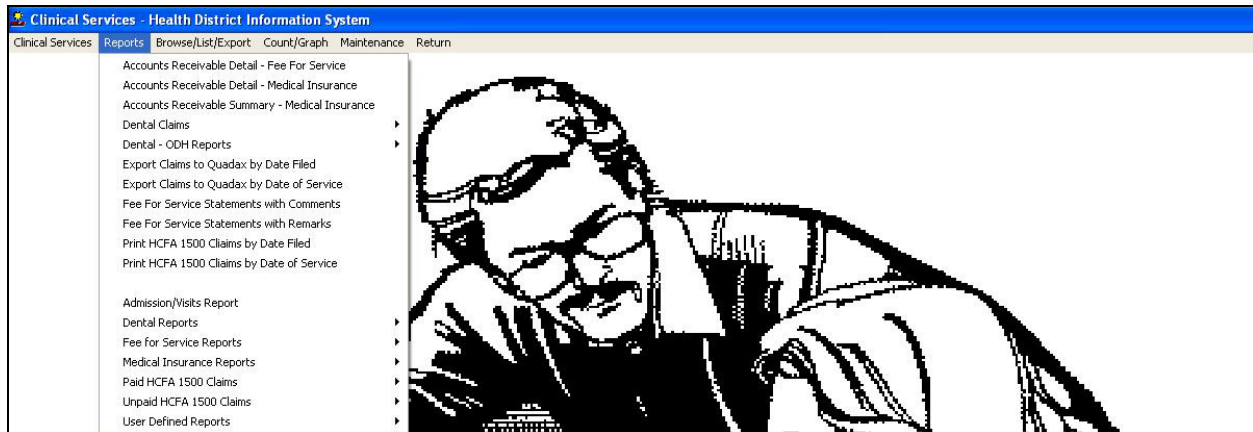
The reports menu contains a list of the many reports that you are able to obtain from the program.

For each report, an option box will appear similar to the one shown above. It allows you to enter dates for your reports as well as use of filters.

Medical Insurance Reports

Reports	Description
Accounts Receivable Detail– Medical Insurance	Lists all clients that have an Insurance Claim Outstanding Balance
Accounts Receivable Summary - Medical Insurance	Accounts Receivable by Insurance Company
Export Claims to Quadax by Date Filed	Creates a print file for electronic submission to Quadax by Date Filed (Date you created the claim)
Export Claims to Quadax by Date of Service	Creates a print file for electronic submission to Quadax by Date of Service
Print HCFA 1500 Claims by Date Filed	Prints HCFA 1500 in batch using the "Date Filed"
Print HCFA 1500 Claims by Date of Service	Prints HCFA 1500 in batch using the "Date of Service"
Admission/Visits Report	Prints Admissions versus Visits for the dates entered
Medical Insurance Charges by Date of Service (Detail)	Lists all medical insurance charges in detail by date of service
Medical Insurance Charges by Date of Service (Summary)	Lists all medical insurance charges in summary by date of service
Medical Insurance Payments by Date of Payment (Detail)	Lists all medical insurance charges in detail by date of payment
Medical Insurance Payments by Date of Payment (Summary)	Lists all medical insurance charges in summary by date of payment
Paid HCFA 1500 Claims by Patient	Lists paid HCFA 1500 claims by patient
Paid HCFA 1500 Claims by Insurance Carrier	Lists paid HCFA 1500 claims by insurance carrier
Paid HCFA 1500 Claims by Program	Lists paid HCFA 1500 claims by program
Unpaid HCFA 1500 Claims by Patient	Lists unpaid HCFA 1500 claims by patient
Unpaid HCFA 1500 Claims by Insurance Carrier	Lists unpaid HCFA 1500 claims by insurance carrier
Unpaid HCFA 1500 Claims by Program	Lists unpaid HCFA 1500 claims by program

Maintenance - Add/Delete/Modify Tables

Maintenance
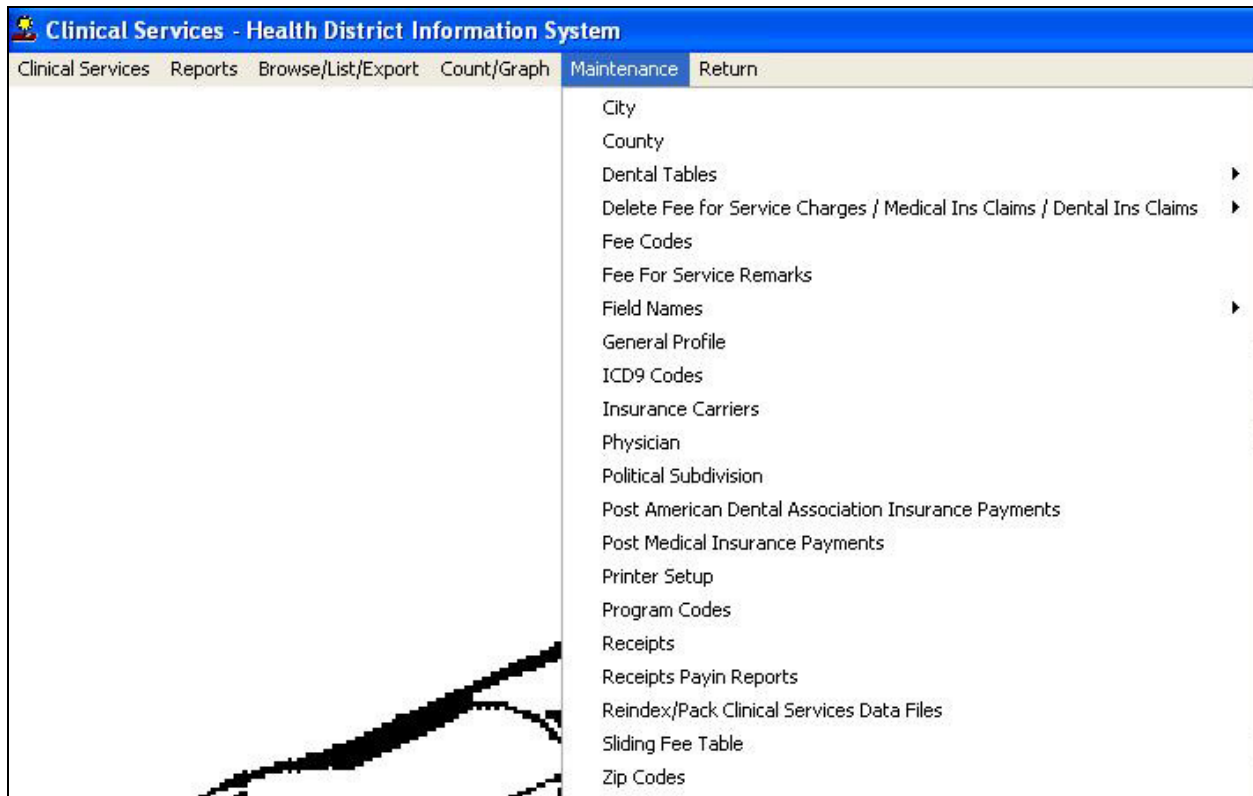
The maintenance menu contains a list of tables that you can modify for your program.

🐿 **City**

Field/Button	Description
City	Enter the city name
Close Button	Closes the table
Add Button	Adds a contact to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Dental Tables – 6780 Dental Fee Codes

Field/Button	Description
Code	Enter the fee code
POS	Enter the place of service
D	Column D on 6780 Form
Days	Column Days on 6780 Form
TOS	Enter the type of service
Pickup	Column Pickup on 6780 Form
Charge	Enter the charge for the fee code
Close Button	Closes the table
Add Button	Adds a fee code to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Dental Tables – ADA Fee Codes

Field/Button	Description
Fee Code	Enter the fee code
Tooth	Enter tooth number
Surface	Enter surface
Diagnosis	Enter diagnosis
Procedure	Enter procedure code
Quantity	Enter quality
Description	Enter the description of the fee code
Fee	Enter the charge for the fee code
Charge A	Charge for 100% of the fee
Charge B	Sliding fee – 80%
Charge C	Sliding fee – 60%
Charge D	Sliding fee – 40%
Charge E	Sliding fee – 20%
Charge F	Sliding fee – 0%
Close Button	Closes the table
Add Button	Adds a fee code to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

![icon] Dental Tables – Dentists

Field/Button	Description
Name	Enter the name of the dentist
Address1	Enter the address of the dentist
Address2	Enter the address of the dentist
City	Enter the city of the dentist
State	Enter the state of the dentist
Zip	Enter the zip of the dentist
Provider #	Enter the provider # of the dentist
Phone	Enter the phone number of the dentist
Fax	Enter the fax number of the dentist
Group Name	Enter the group name of the dentist
Type of Practice	Enter the type of practice
License #	Enter the license number
Add Button	Adds a dentist to the table.
Close Button	Closes the table
Delete Button	Deletes a highlighted entry
Print Button	Prints the list
Envelope	Prints an envelope addressed to the dentist

Dental Tables – Export Import ADA Dental Claims to Lap Top

Use this function to export/import ADA dental claims to and from your server to your lap top. This is used for dental clinics outside the health department.

Dental Tables – Export Import Electronic Dental Claims to Lap Top

Use this function to export/import electronic dental claims to and from your server to your lap top. This is used for dental clinics outside the health department.

Delete Fee for Service/Medical Insurance Claims/Dental Insurance Claims by Date of Entry

Use this function to delete claims incorrectly entered into your database.

![icon] Clinical Services Fee Codes

Field/Button	Description
Fee Code	Enter the fee code
Description	Enter the description of the fee code
Fee	Enter the charge for the fee code
Charge A	Charge for 100% of the fee
Charge B	Sliding fee – 80%
Charge C	Sliding fee – 60%
Charge D	Sliding fee – 40%
Charge E	Sliding fee – 20%
Charge F	Sliding fee –0%
CPT Code	CPT code printed on HCFA 1500
CPT Modifier	CPT Modifier printed on HCFA 1500
ICD9 Code	ICD9 Code associated with this CPT code
Place of Service	Enter the place of service
Type of Service	Enter the type of service
Diagnosis Code	Diagnostic code (usually a 1)
Units	Number of units billed
EPSDT	Prints in EPSDT column of claim
EMG	Prints in EMG column of claim

COB	Prints in COB column of claim
Reserved	Prints in Reserved column of claim
Category	Group charges into Category to print Routing Slips/Super Bills.
Compute Sliding Fee*	Right click to compute the sliding fee scale for the row
Close Button	Closes the table
Add Button	Adds a fee code to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Fee for Service Remarks

This table is used by the Fee For Service Module.

Field/Button	Description
Code	Enter the code for the remark
Description	Enter the description for the remark
Close Button	Closes the table
Add Button	Adds a fee code to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Field Names – Clinical Services/Clinical Services Charges

Field Name	Data Base Field Name
10. AUTO ACCIDENT(NO)	CLS.PC_AAN
10. AUTO ACCIDENT(STATE)	CLS.PC_AAST
10. AUTO ACCIDENT(YES)	CLS.PC_AAY
10. EMPLOYMENT(NO)	CLS.PC_EMPN
10. EMPLOYMENT(YES)	CLS.PC_EMPY
10. OTHER ACCIDENT(NO)	CLS.PC_OAN
10. OTHER ACCIDENT(YES)	CLS.PC_OAY
10D. RESERVED FOR LOCAL	CLS.RESERVE
11. INSURED'S POLICY GRO	CLS.I_POLICY
11A. INSURED'S DOB	CLS.I_DOB
11A. INSURED'S SEX(FEMAL	CLS.I_SEXF
11A. INSURED'S SEX(MALE)	CLS.I_SEXM
11B INSURED'S EMPLOYER	CLS.I_EMP
11C. INSURED'S PLAN	CLS.I_PLAN
11D. ANOTHER BENEFIT PLA	CLS.I_BENEY
11D. ANOTHER BENEFIT PLA	CLS.I_BENEN
12 SIGNATURE ON FILE	CLS.SIG
12. DATE	CLS.SIG_DATE
13. INSURED SIGNATURE	CLS.I_SIG
14. DATE ILLNESS	CLS.P_DOC
14. ILL/INJ/LMP	CLS.P_DOC_TYPE
15. FIRST SIMILAR ILLNES	CLS.P_SYM
16. FROM UNABLE TO WORK	CLS.P_FUTW

The **field names** listing can be very useful in determining what fields you wish to utilize to capture data for letters and when creating reports for that data. The program will display a list of names that you can print.

The **General Profile** enables you to enter the basic information for your health department. The **Clinical Services** information can be found under the "**Community & Public Health Services**" tab.

General Profile – Community & Public Health Services – Clinical Services

Field/Button	Description
HCFA1500 – Alignment 2007	Check if you are using the 2007 HCFA 1500
HCFA1500 – Alignment 2007 - Custom	Sometimes CHC has to design a special HCFA 1500 format.
HCFA 1500 Print Test	Click to print a test HCFA 1500
No Diagnostic Code # on HCFA	Check to remove the Diagnostic code # from the HCFA 1500
Filter ICD9 Codes by Hyphen	Check to filter the ICD9 Codes by a prefix hyphen
Do not bill already billed charges	Check to not be able to bill already billed charges
Post Insurance Balance Due to Fee for Service	Check to post insurance balance due to fee for service
31. Signature of Physician or Supplier	Discontinued
No Zero Balance Statements	Check to not print out zero balance statements
No Negative Balance Statements	Check to not print out negative balance statements

Previous Balance Statements	Check to print out previous balance statements
No Statements Less Than	Enter a number not to print statements less than
Edit Check Prgm. Code & Political Subdivision	Edit check that these fields must be present before adding a charge.
Activate PHYS pull-down	Check to activate the physician pull down
Bill already billed charges	Check to bill already billed dental charges
ADA 2006 alignment	Check for the ADA 2006 alignment
ADA 2006 alignment – custom	(Done by CHC Software)
ADA 1999 – alignment	Check for the ADA 1999 alignment
ADA 1999 – alignment - custom	(Done by CHC Software)
ADA Print Test	Click to print a test ADA Form

ICD9 Codes

Field/Button	Description
ICD9	Enter the code
Description	Enter the description of the code
Close Button	Closes the table
Add Button	Adds a contact to the list
Delete Button	Deletes a highlighted entry
Print by Code Button	Prints the list ordered by the code
Print by Alpha Button	Prints the list alphabetically

Insurance Carriers

Field/Button	Description
Carrier's Name	Insurance carrier's name
Mail to Name	Insurance carrier's address
City	Insurance carrier's city
State	Insurance carrier's state
Zip	Insurance carrier's zip code
Box 33a.	NPI number
Box 33b.	Legacy number
Federal Tax ID	Insurance federal tax ID #
Phone	Insurance carrier's phone #
Fax	Insurance carrier's fax #
Box 31	Enter physician's name
24J. NPI	Enter NPI number for 24J field on the form
24J. Legacy # and ID	Check to print legacy # in 24j.
32 same as 33	Check to copy info from 33 to 32
Add Button	Adds a carrier to the table.
Close Button	Closes the table
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Physicians

Field/Button	Description
Name	Enter the name of the dentist
Address1	Enter the address of the dentist
Address2	Enter the address of the dentist
City	Enter the city of the dentist
State	Enter the state of the dentist
Zip	Enter the zip of the dentist
NPI # ^ Legacy #	Enter the NPI/Legacy #
Phone	Enter the phone number of the dentist
Fax	Enter the fax number of the dentist
Group Name	Enter the group name of the dentist
Type of Practice	Enter the type of practice
Add Button	Adds a dentist to the table.
Close Button	Closes the table
Delete Button	Deletes a highlighted entry
Print Button	Prints the list
Envelope	Prints an envelope addressed to the dentist

![Political Subdivisions icon] **Political Subdivisions**

Field/Button	Description
Code	Enter the code of the subdivision
Subdivision	Enter the subdivision
Close Button	Closes the table
Add Button	Adds a code to the table
Delete Button	Deletes a highlighted entry
Print	Prints the list

🧍 Post Payments American Dental Association

```
┌────────────────────────────────────────────────────────┐
│ 📁 Post Payments - American Dental Association      ✕   │
├────────────────────────────────────────────────────────┤
│                                                        │
│           From date of service    To date of service   │
│           ┌──────────────┐        ┌──────────────┐      │
│           │  / /         │        │  / /         │      │
│           └──────────────┘        └──────────────┘      │
│                                                        │
│                                                        │
│                        ┌──────────┐    ┌──────────┐    │
│                        │ Continue │    │  Cancel  │    │
│                        └──────────┘    └──────────┘    │
│                                                        │
└────────────────────────────────────────────────────────┘
```

To post received payments for your ADA claims, enter the date range for the dates of service that you were paid and click "**Continue**".

```
┌──────────────────────────────────────────────────────────────────────────────────────┐
│ 📁 Post Payments - American Dental Association Claims                              ✕   │
├──────────────────────────────────────────────────────────────────────────────────────┤
│ Find │                                              │       Find                       │
│                                                                                        │
│ Patient      │DOB  │Account #│From DOS│Proc│Charge│Date Paid│Paid │Adj. Amt │▲         │
│              │     │         │        │    │      │         │     │         │          │
│              │     │         │        │    │      │         │     │         │          │
│              │     │         │        │    │      │         │     │         │          │
│              │     │         │        │    │      │         │     │         │          │
│                                                                                        │
│ Date 01/26/2008   Amount    0.00   │Post Date & Amt│Post Date, Amt & Adjust Off│Close│ │
└──────────────────────────────────────────────────────────────────────────────────────┘
```

The program will then list all the clients with claims that have dates of service in the entered date range. Enter the amount received for the client and either click "**Post Date & Amt**" (for full payment) or "**Post Date, Amt & Adjust Off**" (partial payment). When finished posting payments for your clients, click "**Close**"

🏃 **Post Payments Medical Insurance**

To post received payments for your Medical Insurance claims, enter the date range for the dates of service that you were paid and click "**Continue**".

The program will then list all the clients with claims that have dates of service in the entered date range. Enter the amount received for the client and either click "**Post Date & Amt**" (for full payment) or "**Post Date, Amt & Adjust Off**" (partial payment). When finished posting payments for your clients, click "**Close**"

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Print Setup

The print setup allows you to choose what printer you would like to print from. Select the printer in the name dropdown and click "**OK**".

Program Codes

Field/Button	Description
Code	Code utilized for each program
Program	Program name
Update Module	Ignore
Fund #	Ignore
Close Button	Closes the table
Add Button	Adds a code to the table
Delete Button	Deletes a highlighted entry
Print	Prints the list

![Receipts icon] **Receipts**

If your health department has the "**Receipts**" module, you have the ability to print any receipt through the "**Maintenance**" tab. You may also print a receipt from the Immunization data entry windows by pressing ALT-R keys.

Receipts Pay In Reports
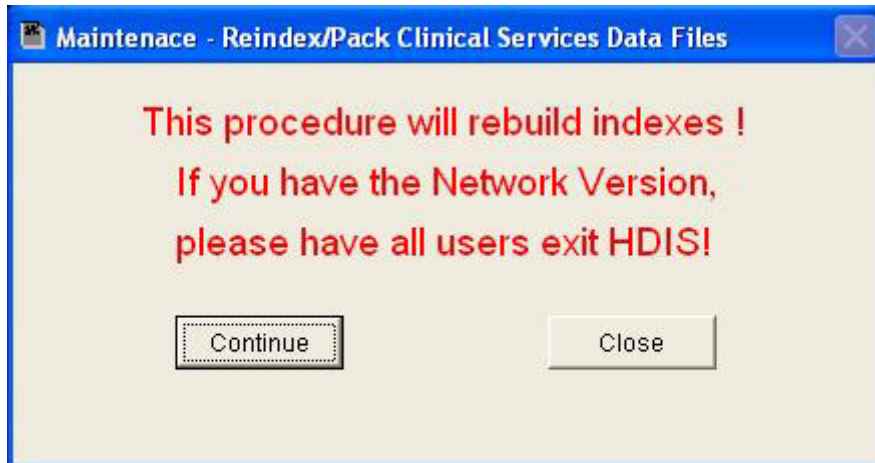

If your health department has the "**Receipts**" module, you have the ability to print your pay in reports through the "Maintenance" tab.

Reindex/Pack Clinical Services Data Files

This function is only needed should your data be corrupt due to a power failure. Please contact CHC Software if you have any questions or concerns.

![Sliding Fee Scale icon] **Sliding Fee Scale**

HDIS will automatically enter the current sliding fee scale.

🏃 **Zip Codes**

Field/Button	Description
Zip	Enter the zip code
Close	Closes the table
Add Button	Adds a row to the table
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

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