

HDIS
Health Department Information System
Helping You...Help Others

HCFA Alignment

User Manual



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HCFA Introduction

To adjust HCFA forms, navigate to the **General Profile** selection from the **Maintenance** menu tab:



The HDIS modules where HCFA alignment is currently available are: **BCMh, Health Services, and Insurance Billing/Statements.**

After clicking **General Profile**, a new window will appear:

A screenshot of the 'General Profile' form window. The window title is 'General Profile'. It has several tabs: 'Demographics', 'General', 'Management', 'Environmental', 'Community & Public Health Services', 'Vital', and 'Support'. The 'Demographics' tab is active. The form contains the following fields:

- * Health Department: BGI HD
- Division: Division Test
- * Address1: 7550 Lucerne Drive
- Address2: (empty)
- * Phone #'s: 1-440-891-9100
- Federal Tax ID: ADFA
- Commissioner: Doc Darrell
- Client/Server Location: M:\HDIS\DATA
- Email: ADFASD
- Make Checks Payable to: ADSF
- * City: Middleburg Heights
- * State: OH
- * Zip: 44130
- * County: generic
- * FAX #: 1-440-891-9458

At the bottom, there is a 'View Archives' section with checkboxes for years from 2019 to 1998.

Select the module where alignment is needed. When making HCFA alignment adjustments, the adjustments will be effective for all modules which printing of HCFA forms occurs.

BCMh:

General Profile

Demographics | General | Management | Environmental | Community & Public Health Services | Vital | Support

Appointments | **BCMh** | Communicable Disease | Flu Clinics | Health Clinic-OH | Help Me Grow | HIV/AIDS Testing | Home Visit-OH | Immunizations | Insurance Billing / Statements | Lead Clinics

BCMH - Enter billing using Billing Codes only
 BCMH - Style 2 - Wayne County
 BCMH Clerical Staff
 BCMH Nursing Staff
 BCMH - HCFA 1500's - Rebill
 BCMH-Box 33a. / 24J

 BCMH-Box 33b. / 24J

 BCN Nutrition-Box 33b. / 24J

 County Code

HCFA 1500

HCFA 1500-Alignment 2007
 HCFA 1500-Alignment 2007 - Custom
 HCFA 1500-Alignment 2011 (NDC fields)
 HCFA 1500-Alignment 2011 (NDC fields-Custom)
 HCFA 1500-Alignment 2014
 HCFA 1500-Alignment 2014 (Custom)

HCFA 1500 Print test

BCMH - HCFA 1500's - Include charges outside LOA

Location of PDF Documents

Health Services:

General Profile

Demographics | General | Management | Environmental | Community & Public Health Services | Vital | Support

Appointments | BCMH | Communicable Disease | Flu Clinics | Health Clinic-OH | Help Me Grow | HIV/AIDS Testing | Home Visit-OH | **Health Services** | Insurance Billing / Statements

Print Due Date on Labels
 Immunization Print Style
 Output to Phone Master File
 Do not display Information / Birth Information / Alias
 Location of PDF Documents

 Post Historic Vaccinations with Compound Vaccine

HCFA 1500

HCFA 1500-Alignment 2007
 HCFA 1500-Alignment 2007 - Custom
 HCFA 1500-Alignment 2011 (NDC fields)
 HCFA 1500-Alignment 2011 (NDC fields-Custom)
 HCFA 1500-Alignment 2014
 HCFA 1500-Alignment 2014 (Custom)

HCFA 1500 Print test

Use new Health Services for Immunization Activities All Users in HDIS Current Workstation Only

Insurance Billing/Statements:

General Profile

Demographics | General | Management | Environmental | Community & Public Health Services | Vital | Support

Lead Clinics | Nurses Daily | TB Testing

Appointments | BCMH | Communicable Disease | Flu Clinics | Health Clinic-OH | Help Me Grow | HIV/AIDS Testing | Home Visit-OH | Health Services | **Insurance Billing / Statements**

HCFA 1500

- HCFA 1500-Alignment 2007
- HCFA 1500-Alignment 2007 - Custom
- HCFA 1500-Alignment 2011 (NDC fields)
- HCFA 1500-Alignment 2011 (NDC fields-Custom)
- HCFA 1500-Alignment 2014
- HCFA 1500-Alignment 2014 (Custom)

HCFA 1500 Print test

Folder location for SIIS import

Location of PDF Documents

- No Diagnostic code # on HCFA
- Filter ICD9 Codes by hyphen
- Do not bill already billed charges
- Post Insurance Bal Due to Statements
- Include Detail on Bal Due Statements

31. Signature of Physician or supplier

- Use Availity Clearing House (formerly Realmed)

- No Zero Balance Statements
- No Negative Balance Statements
- Previous Balance Statements

No Statements Less Than

- Edit Check Prgm. Code & Political Sub.
- Activate PHYS pull-down

Dental Claims

- Bill already billed charges
- ADA 2012 - Alignment - Custom
- ADA 2006 - Alignment
- ADA 2006 - Alignment - Custom
- ADA 1999 - Alignment
- ADA 1999 - Alignment - Custom

ADA Print test

* The process of managing custom forms for Dental Claims is the same as discussed here for the HCFA 1500 form, but specified with the Dental Claims section of the Insurance Billing/Statements screen.

Selecting Form

Initial Setting

Initially, none of the HCFA 1500 – Alignment selections will be selected.

HCFA 1500

- HCFA 1500-Alignment 2007
- HCFA 1500-Alignment 2007 - Custom
- HCFA 1500-Alignment 2011 (NDC fields)
- HCFA 1500-Alignment 2011 (NDC fields-Custom)
- HCFA 1500-Alignment 2014
- HCFA 1500-Alignment 2014 (Custom)

HCFA 1500 Print test

To select a form, simply click the mouse on the checkbox for the desired alignment. The selection of the HCFA 1500-Alignment 2014 is shown below.

HCFA 1500

- HCFA 1500-Alignment 2007
- HCFA 1500-Alignment 2007 - Custom
- HCFA 1500-Alignment 2011 (NDC fields)
- HCFA 1500-Alignment 2011 (NDC fields-Custom)
- HCFA 1500-Alignment 2014
- HCFA 1500-Alignment 2014 (Custom)

HCFA 1500 Print test

*The current expected format for the submission of insurance claims is the **HCFA 1500-Alignment 2014**. “Custom” does not mean “Custom form,” but is an identical copy of the specified form readily available for alignment adjustments. This is necessary because all printers do not line up the feed of the paper and the print head to the exact same position. The process for testing the alignment and making adjustments is discussed on the following pages.*

Test Print

The agencies which claims are submitted to are adamant that the details presented on the claims are **ENTIRELY** within the sections for each detail. This applies most specifically to the details specified with a single 'X'. Any instance of a detail touching the **red** border will cause the entire claim to be rejected.

To verify that all details will be positioned properly, preventing rejecting of claims, you can perform a test print by clicking the **HCFA 1500 Print** test button.

Make sure that the HCFA 1500 forms are in the paper tray such that the upper left corner of the sheets is firmly against the frame of the tray.

The test print will show 'X's for text values, with the X's replicated to match the maximum number of characters available for the text value.

For numeric values, the value of 99.99 will be displayed. If the field on the form shows a line to separate the dollars and cents components, make sure that both the dollars and cents values are within the appropriate area. The decimal point should be in the vicinity of the line.

For date values, the current date will be displayed. If the field is uninterrupted, the date will be shown as mm/dd/yyyy. If the components of the date are separated, digits for such components will be displayed without the slashes.

If any details print on or outside the **red** border, a custom layout of the HCFA form will need to be created to make adjustments to the position of details so that they are entirely inside the red border.

Creating Custom Form

To create a custom version of the HCFA form, simply right-click the mouse on the standard form selection. This creates a copy of the report template. The custom selection, with (Custom) in description, will become available for selection, as shown below.

- HCFA 1500-Alignment 2014
- HCFA 1500-Alignment 2014 (Custom)

To make the custom specification selected, deselect the current 2014 selection and select the 2014 (Custom) selection.

The steps for making adjustments in the layout of the form are discussed in the next section.

Adjusting Alignment

In order to adjust the form, make sure the HCFA form selected has **(Custom)** at the end. The **Custom** forms are there to apply any necessary adjustments.

HCFA 1500

- HCFA 1500-Alignment 2007
- HCFA 1500-Alignment 2007 - Custom
- HCFA 1500-Alignment 2011 (NDC fields)
- HCFA 1500-Alignment 2011 (NDC fields-Custom)
- HCFA 1500-Alignment 2014
- HCFA 1500-Alignment 2014 (Custom)

HCFA 1500 Print test

- BCMH - HCFA 1500's - Include charges outside LOA

Location of PDF Documents

Once the HCFA 1500-Alignment 2014 (Custom) box has a checkmark, click (*single click*) the Bold “**HCFA 1500**” label text at the top.

HCFA 1500

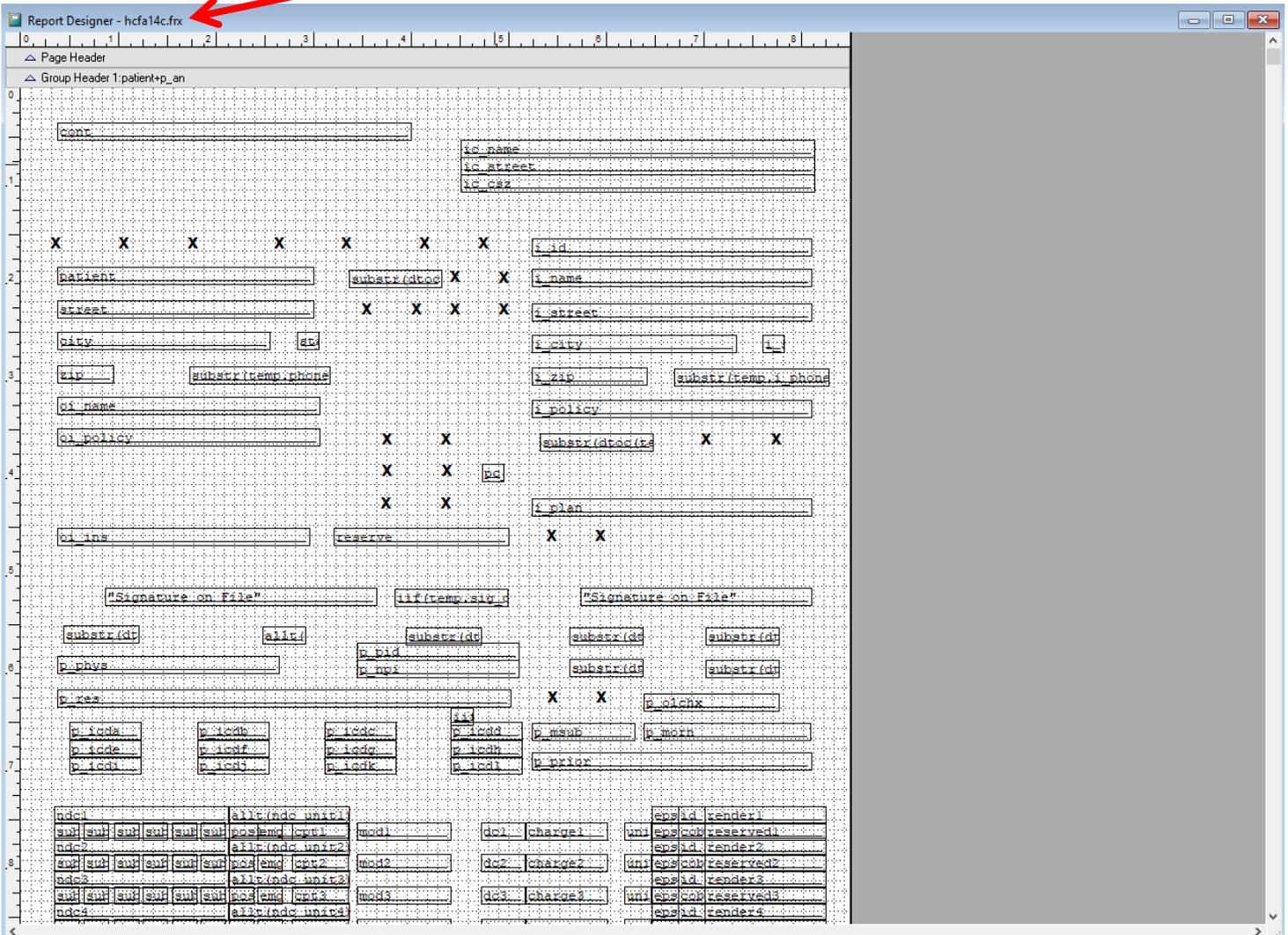
- HCFA 1500-Alignment 2007
- HCFA 1500-Alignment 2007 - Custom
- HCFA 1500-Alignment 2011 (NDC fields)
- HCFA 1500-Alignment 2011 (NDC fields-Custom)
- HCFA 1500-Alignment 2014
- HCFA 1500-Alignment 2014 (Custom)

HCFA 1500 Print test

The window displaying the custom report layout is shown on the next page.

Alignment Window

Once the new window, showing title of "Report Designer – hcfa14c," is displayed, you can make the adjustments.



Making Adjustments

Making adjustments to the layout can be done individually or for many fields at once.

To select a large section of contiguous fields:

- Click the mouse in an empty space of the report form and drag the mouse to cover the region of selection. A box will be displayed outlining the group of fields to be selected.

To select multiple fields individually:

- Hold the Shift key and click the individual fields that need to be aligned.

Deselecting individual fields

- Hold the Shift key and click the individual field which shows as currently selected.

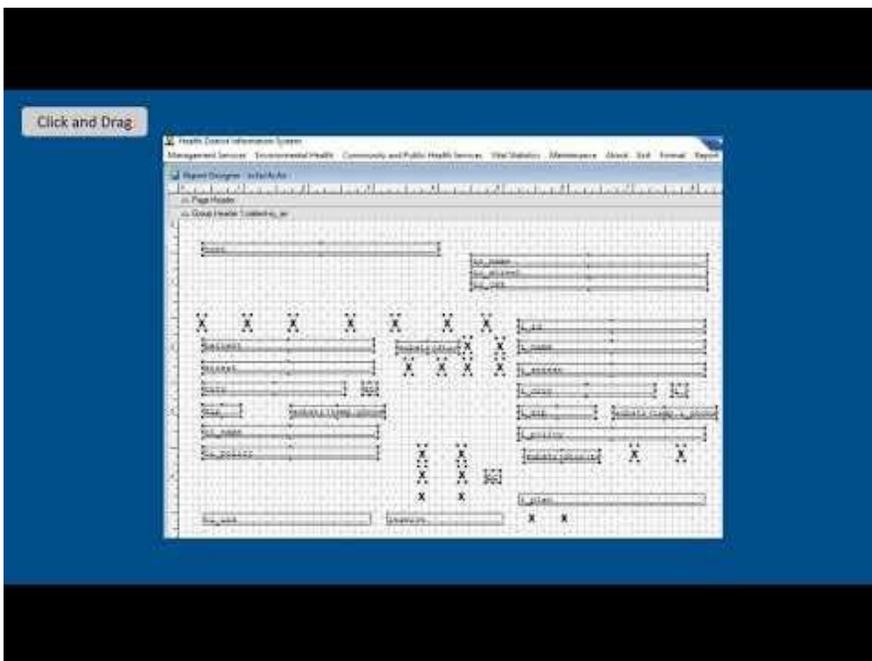
Deselecting all selected fields

- Click the mouse in an empty region of the report form.

Video of Alignment Selections

The following link will take you to a YouTube video demonstrating the two types of alignment selections.

[Alignment Selection Examples](#)



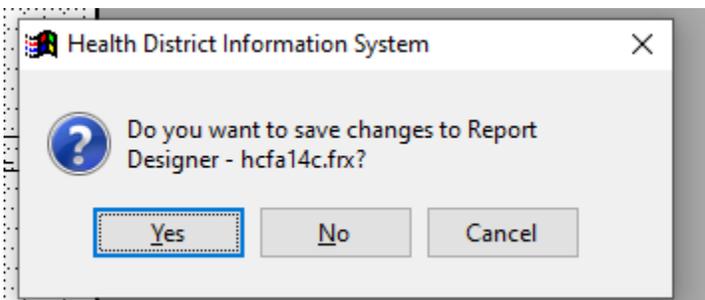
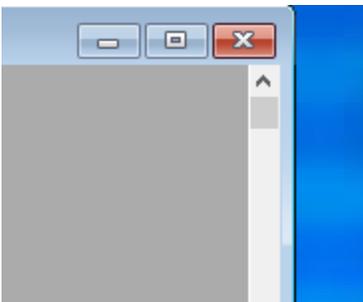
NOTE - As details for the HCFA 1500 claim form will be too large to be displayed entirely on screen, you can click the mouse on the scroll bar on the right side and slide it down to view the additional details of the claim.

Moving Positions of Fields

Upon selecting the field(s) which the position is to be altered, use the arrow keys to move ALL the selected fields the appropriate distance to position the field entirely inside the section on the HCFA form. The selected fields will be moved simultaneously the same distance.

Saving Modifications

When done making changes to the positioning of the details in the report template, click the red X at the top of the report to close out of this screen. A message window will appear to ask if you want to Save or Discard the changes made.



Additional shortcuts available while you are in the report template editor include:

- CTRL+W Save changes and remain in screen for additional editing

- CTRL+S Save changes and exit the screen
 Similar to clicking red X described above except the prompt to verify saving of
 changes will not be displayed

- Esc Exit and discard modifications
 A message window prompting to verify desire to exit without saving
 modifications will be displayed.
 Any modifications previously saved by pressing CTRL+W will be retained.