

HCFA-1500

Fill & Print / eDirect

User Manual



Welcome!

Please enjoy our software.

If you have any questions, comments,
problems, solutions, compliments,
or issues,
please contact us!

UB04software.com Customer Service

E: Support@UB04software.com

P: 866.829.2763 | F: 866.795.4975

W: www.UB04software.com

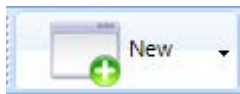
New Toolbar!




Replaces:





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- Blank Form with Prefills
 - Create a brand-new, blank form that includes your **Prefills** 
- Blank Form
 - Create a brand-new, blank form.
- Form for Patient (+ Page)
 - Create a new page for the Current Patient
 - Removes data in Box 24A - J



- Save 
 - **Save** your current **form**.
 - Adjust this button's function in *Options > Load/Save*
- Load 
 - **Load** a **form**.
 - Adjust this button's function in *Options > Load/Save*



- 🌀 Open From File with Prefills
 - **Load claims** from a file (e.g. *.npi, *.hcfa1500) with **Prefills** ☆
 - *Select multiple claims! (CTRL+Click or SHIFT+Click)*
- 🌀 Open From File
 - **Load claims** from an external file (e.g. *.npi, *.hcfa1500).
 - *Select multiple claims! (CTRL+Click or SHIFT+Click)*
- 🌀 Open From Database
 - **Load claims** from the internal *Claim Form Database* (see below).
- 🌀 Save To File (**Save As**)
 - **Save claims** to an external file (*.hcfa1500), **anywhere**.
- 🌀 Save To Database
 - **Save claims** to the internal *Claim Form Database* (see below).

Claim Form Database - Open using *Data* > *Open From Database*

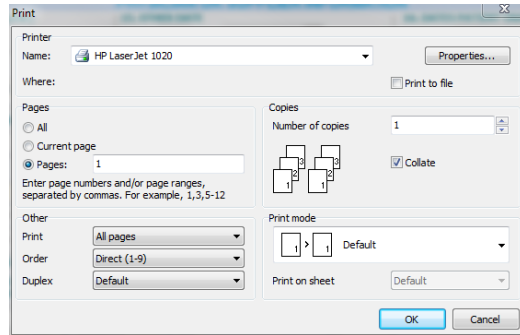
Id	Patient's Name	Date Created	DOS	Proc	Total \$	Insured ID #
13	DUCK, DONALD	4/3/2014	11/21/2012	998744	78.75	QUACK145624
3	HANKS, TOM	3/31/2014	12/13/2000	80502	35.75	464123863
4	HANKS, TOM	4/1/2014	12/13/2000	80502	35.75	464123863
11	MOUSE, MICKEY	4/3/2014	4/3/2014	86677	1332.75	12345678890
12	MOUSE, MICKEY	4/3/2014	4/1/2014	86677	3198.75	12345678890

- 🌀 Tabs
 - **Claims:** Main storage. Your claims.
 - **Archive:** Alternate claim storage. *Optional*.
 - **Templates:** Template files. *Create by leaving Patient Name blank*.
- 🌀 Search bar - Bottom-right corner. Explore in real-time.
- 🌀 Choose a claim to open and press **Load**.



Print Now!

- Always **prints** the data. Will print the form based **Print Mode**.
- Can print Text Only or Text & Form (color, b&w).



Batch Print

- Print multiple pages at one time.

Print Mode

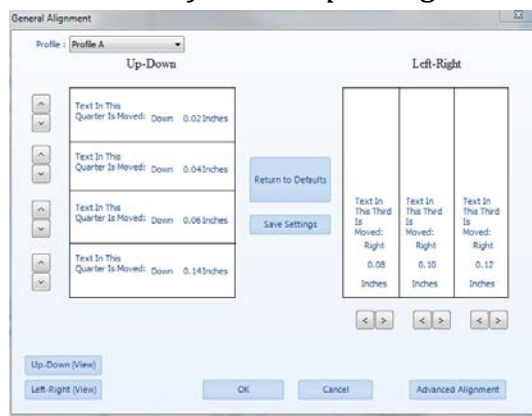
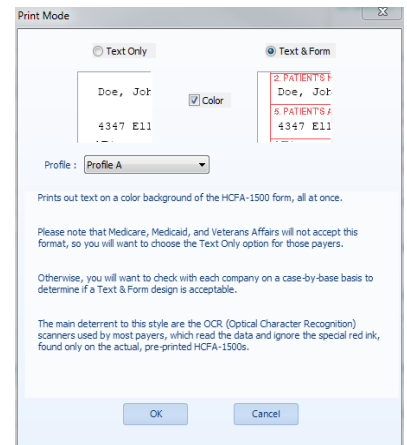
- Choose between **Text Only** or **Text & Form**.
- *Text & Form prints in color or black & white.*

Print Font

- Adjust the printed font. Bold option.

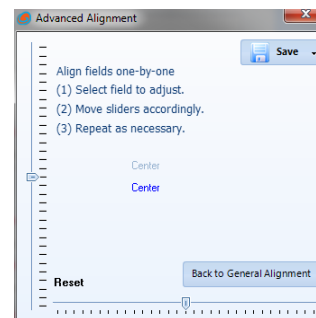
General Alignment

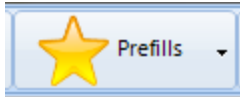
- Adjust the print alignment in large chunks.
- *Up-Down is vertical movement; Left-Right is horizontal movement.*
- *Set Profiles for multiple alignment setups.*



Advanced Alignment

- Adjust print alignment field-by-field.





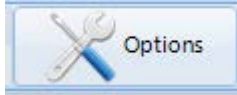
Prefills

- Fill out data to be saved and applied to future claims. *Time-saver.*
- Setup multiple "Profiles" from the dropdown.
 - *Rename by right-clicking.*
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- Save & Apply: Save entry and apply to current form.
- Save: Save data entries and any changes in Form Prefills.

The screenshot shows the 'Form Prefills' application window. It features a star icon and the title 'Form Prefills'. The interface is organized into several sections with blue headers:

- Signature:** Includes checkboxes for writing signatures on file in boxes 12, 13, and 31, and for autofilling today's date in boxes 12 and 31.
- Provider Data:** Contains fields for Box 241 (Rendering Provider NPI), Box 25 (Federal Tax ID Number), and a dropdown for Type of Tax ID Number (SSN or EIN).
- Service Facility Location Info:** Includes fields for Service Facility Name (Box 32-1), Address (Box 32-2), City, State, Zip, Service Facility NPI (Box 32a), and Service Facility Other ID (Box 32b).
- Billing Provider Info:** Includes fields for Billing Provider Phone # (Box 33) Area and # (Box 33), Billing Provider Name (Box 33-1), Billing Provider Address (Box 33-2), City, State, Zip, Billing Provider NPI (Box 33a), and Billing Provider Other ID (Box 33b).
- Yes or No?:** A grid of questions with radio button options: Another insurance plan?, Employment Accident?, Outside lab?, Auto Accident?, and Accept Assignment?, Other Accident?.
- Auto Accident State:** A dropdown menu for Auto Accident State.
- ICD Indicator:** A dropdown menu for Box 21 - ICD Indicator, currently set to 0 - ICD-10-CM.

At the top right, there are buttons for 'Clear Checked Fields', 'Check All', and 'Uncheck All'. At the bottom, there are buttons for 'Save & Apply', 'Save', and 'Cancel'.



Options

- **User Interface:**

- Capitalize All Entries: Auto-capitalize data entry.
- **AutoCopy** data in 24A - J: Copies data vertically (down). *AutoFill*.
- Disable AutoAddition in Box 28 (Total Charges).
- Disable AutoFill from Box 6 (Self):
 - Turns off Patient-to-Insured data copying.
- **Display Text Color:** Change the color of the form's text.

- **Load/Save:**

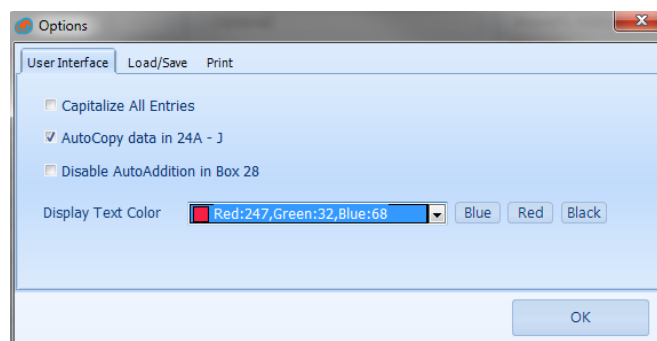
- Overwrite when Load From File:
 - When loading multiple files at once, overwrite if file exists.
- Save/Load To/From File **Toolbar Function:**
 - **Toggles** the Load/Save toolbar icons to:



- Load/Save internally to the database (*default*).
 - Load/Save externally to a file.
- Load File Location: Default "Load From File" location.
 - Save File Location: Default "Save To File" location.

- **Print:**

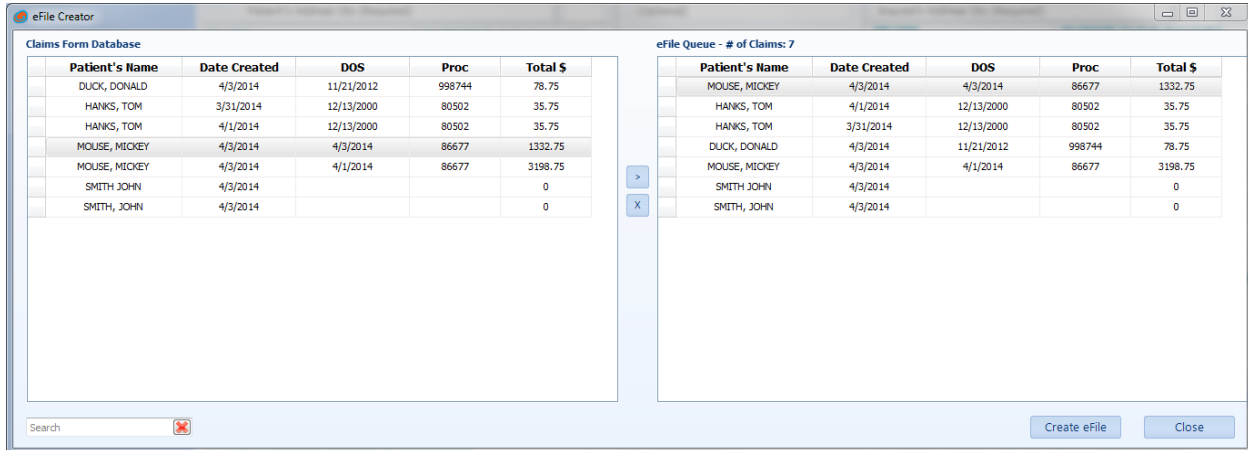
- Display Print Mode before Print.
- Remove Print Commas (Box 2 & 4): Disables comma output.
- Date Output: Adjust the date print output separation character.
- Date-Year Format: Print years of date fields in CCYY or YY format.
 - Apply to Box 3 & 11a: Check to enable.





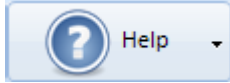
eClaims*

- Create **eFile**: Generates a *.ehcfa **Print Image** file.
- *Valid 'Print Image' eFile (electronic) output.*
 - *Can open as *.txt - with Notepad.*
 - **Only visible in eDirect edition.*



How do I create eClaims?

- Click the *eClaims* button.
- Click the *eFile Creator* option.
- "Move" the relevant claims--the ones you wish to submit--to the right-hand list using the arrow buttons.
- Click *Create eFile*.
- Choose a processor. [More information here.](#)
- Save the file to an easy-to-reach location (e.g. Desktop).
- Login to your processor & upload *only* the *.ehcfa file.
 - *Any other type of file will not work.*
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- **How-To Demo:** UB04software.com/how-to/eClaims



Help

- Opens HCFA-1500 Instructions - *NUCC Manual*.

Retrieve Registration

- Enter one piece of information & click **Retrieve Registration**.
- **Clear Database** to remove all internally saved claim data.
- **Deactivate** to preserve the user license.

Check for Update

- Scours the interwebs for a software update.

Website

- Opens your favorite website, UB04software.com.

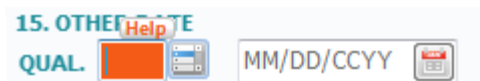
About

- Shows version number, build date, and edition name.
- *Always great information to send your Support Agent!*



Status Bar

- **Current** Patient's Name. *Double-click to Load Form.*
- **Status**: Opened claim's status. *Double-click to Save Form.*
 - **Status: Saved** - Claim successfully saved.
 - **Status: Changed!** - Claim changed. *Save to avoid data loss.*
 - **Status: Loaded** - Claim successfully loaded.
- **Progress Bar**: Tells you when the program is busy.



Field Options

- **Help** boxes - Hover to display the [NUCC standard](#) for that field.
- **Dropdown** boxes - Click and choose.
- **Calendar** boxes - Click to view calendar widget.

Common Issues

🌀 How do I create eClaims?

- Click the *eClaims* button & select *eFile Creator*.
- "Move" the relevant claims-to the right-hand list.
- Click *Create eFile*. Choose a processor. [More information here.](#)
- Save the file to an easy-to-reach location (e.g. Desktop).
- Login to your processor & upload *only* the *.ehcfa file.
 - **How-To Demo:** UB04software.com/how-to/eClaims

🌀 Where is Importation (Excel/CSV)?

Importation (*How To*):

- Data > Import From > MS Excel > 02-12 HCFA
 - To obtain "our format," view the Template instructions below.
- You can *also* import with **Prefills**:
 - Set these ahead of time by clicking Prefills.
 - Data > Import From > MS Excel *with Prefills* > 02-12 HCFA

Creating an Importation Template:

- **To create a template:**
 - Data > Export To > MS Excel > Create Template (button)

Using Importation Template:

- You can enter your data into this Excel spreadsheet, with **each row representing a new claim** form (to be created).
- Please note that you do **not** have to fill out every field in this template.
 - Whatever is left *blank* will be imported *blank*.
- Upon importing the data, you will be prompted for a save location.
 - We recommend creating a new folder, as you can easily create hundreds of claims at one time.
- After importation, the claim files will be editable in the software.

🌀 **Why does the form look jumbled and disjointed?**

- Choose the "Smaller - 100%" text magnification in Windows.
- Walkthrough: Windows.Microsoft.com/en-us/Windows7/Display-Magnification

🌀 **How do I change the **blue** color of form's text?**

- Options > Display Color Text. Have fun!

🌀 **Where is AutoFill? I loved that feature!**

- Options > AutoCopy data in 24A - J

🌀 **Will this work with [Insurance Company XYZ]?**

- It should, our software is based off of the [NUCC standards](#).
- *They are the folks that make the form.*

🌀 **Does this work on Mac OS X?**

- Yes, using CrossOver by Codeweavers.
 - It creates a sub-section of folders to run this program.
- (1) First, go here: Codeweavers.com/UB04software.com
- (2) Install CrossOver.
- (3) Install UB04software.com's product (using the CrossTie).
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- **How-To Video:** YouTube.com/CrossOver-UB04software.com
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- **Coupon Codes for 25% off CrossOver:** via_HCFA-1500
- *Users also report success with Parallels & VMware Fusion.*