

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

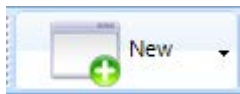
New Toolbar!



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*

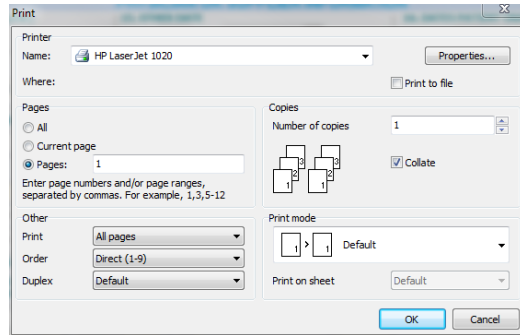
Id	Patient's Name	Date Created	DOS	Proc	Total \$	Insured ID #
13	DUCK, DONALD	4/3/2014	11/21/2012	998744	78.75	QUACK145624
3	HANKS, TOM	3/31/2014	12/13/2000	80502	35.75	464123863
4	HANKS, TOM	4/1/2014	12/13/2000	80502	35.75	464123863
11	MOUSE, MICKEY	4/3/2014	4/3/2014	86677	1332.75	12345678890
12	MOUSE,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

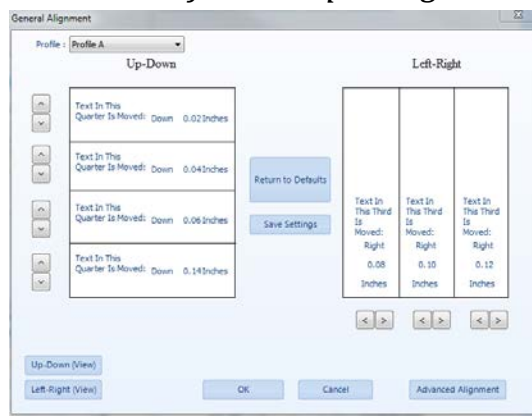
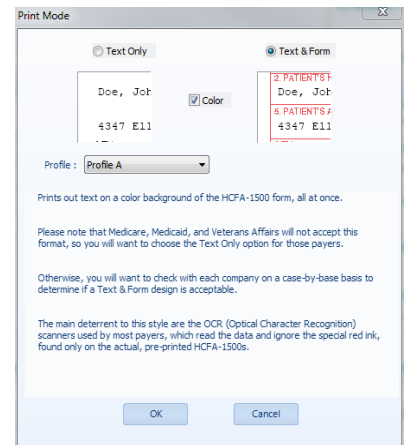
- Choose between **Text Only** or **Text & Form**.
- *Text & Form prints in color or black & white.*

Print Font

- Adjust the printed font. Bold option.

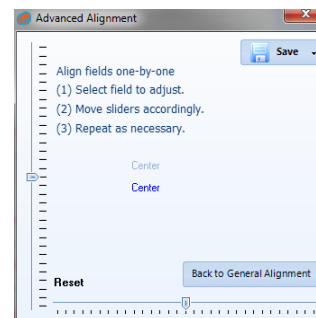
General Alignment

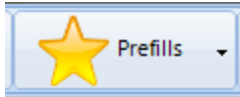
- Adjust the print alignment in large chunks.
- *Up-Down is vertical movement; Left-Right is horizontal movement.*
- *Set Profiles for multiple alignment setups.*



Advanced Alignment

- Adjust print alignment field-by-field.





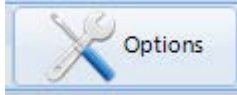
Prefills

- 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 a software window titled "Form Prefills" with a star icon in the top left. The window is divided into several sections for data entry:

- Signature:** Includes checkboxes for "Write 'Signature On File' in Box 12 (Patient Signature)", "Autofill Today's Date in Box 12", "Write 'Signature On File' in Box 13 (Insured Signature)", "Write 'Signature On File' in Box 31 (Physician Signature)", and "Autofill Today's Date in Box 31".
- Provider Data:** Includes "Box 241 - Rendering Provider NPI", "Federal Tax ID Number" (Box 25), and "Type of Tax ID Number" (radio buttons for SSN and EIN).
- Service Facility Location Info:** Includes "Svc. Facility Name (Box 32) - 1", "Svc. Facility Address (Box 32) - 2", "City", "State", "Zip", "Svc. Facility NPI (Box 32a)", and "Svc. Facility Other ID (Box 32b)".
- Billing Provider Info:** Includes "Billing Provider Phone # (Box 33) Area", "Billing Provider Phone # (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?:** Includes "Another insurance plan?", "Employment Accident?", "Outside lab?", "Auto Accident?", "Accept Assignment?", and "Other Accident?".
- Auto Accident State:** Includes "Auto Accident State".
- ICD Indicator:** Includes "Box 21 - ICD Indicator" with a dropdown menu.

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:**

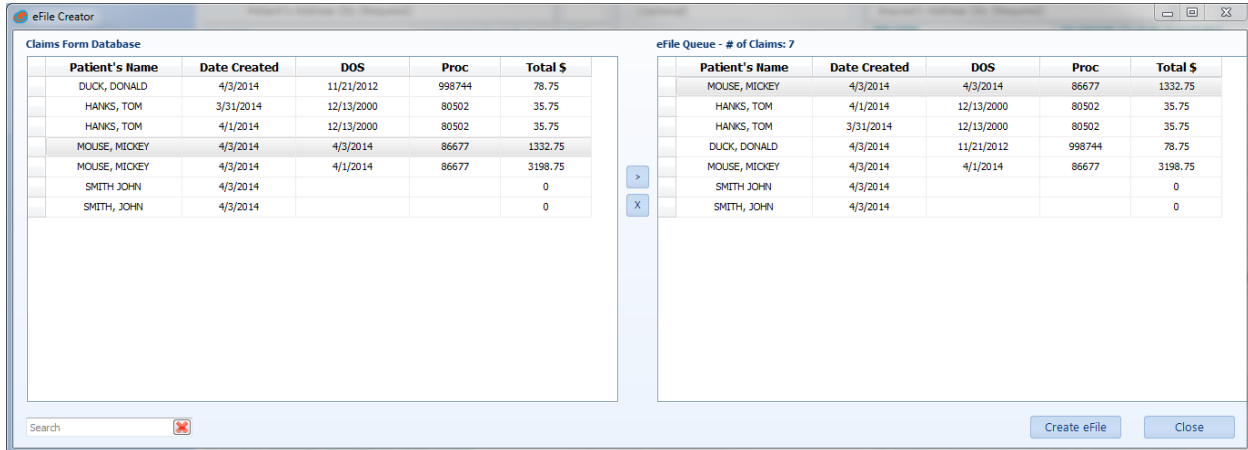
- Display Print Mode before Print.
- Remove Print Commas (Box 2 & 4): Disables comma output.
- Date Output: Adjust the date print output separation character.
- Date-Year Format: Print years of date fields in CCYY or YY format.
 - Apply to Box 3 & 11a: Check to enable.





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.

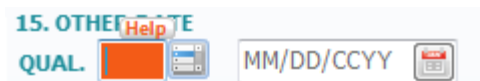
About

- 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*.
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🌀 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.*