



Chiropractic Management Software (VC)

VersaSoft CHIRO Tutorial

developed by



VERSATILE SOFTWARE
systems, inc.

VersaSoft CHIRO

formally known as

For Chiropractors Only (FCO)

This tutorial explains how to perform basic tasks in *VersaSoft Chiro – Manager*. The tutorial should be read in a step by step manner and paragraphs with title headings should be fully read and completed. Topics at the end of this tutorial depend on information entered by you in previous exercises.

Please call our support line if you have any questions or problems that are not resolved in this tutorial. Note, this tutorial and a copy of *VersaSoft Chiro* can be downloaded from our web site at: www.VersaSoft.net once the demo page is sent.

Topics:

1. What is VersaSoft Chiro– *Manager*?
2. How do I load *Manager*?
3. How do I exit *Manager*?
4. How do I get help in *Manager*?
5. How do I add a new patient?
6. What do the screens mean in *Manager*?
7. How do I save a patient's file?
8. How do I undo changes made to a patient's file?
9. How do I search for a patient?
10. How do I enter the patient's diagnosis?
11. How do I enter the patient's current condition information?
12. How do I enter the patient's coverage information?
13. How do I enter services into the patient's ledger?
14. How do I read the ledger balances?
15. How do I enter a payment from the patient?
16. How do I print a single patient statement?
17. How do I print a single insurance claim?

1. What is VersaSoft Chiro– *Manager*?

- The *Manager* is where the individual patient's general, billing, condition, coverage, ledger, letter, and retention information is entered and stored.

2. How do I load *Manager*?

- Click on the **Start** button, then **Programs**.


- Click on **VersaSoft CHIRO**, then **Manager**.




3. How do I exit *Manager*?

- Choose **File, Exit** from the Main Menu.
- Or Click on the **close** button in the upper right corner of your screen.

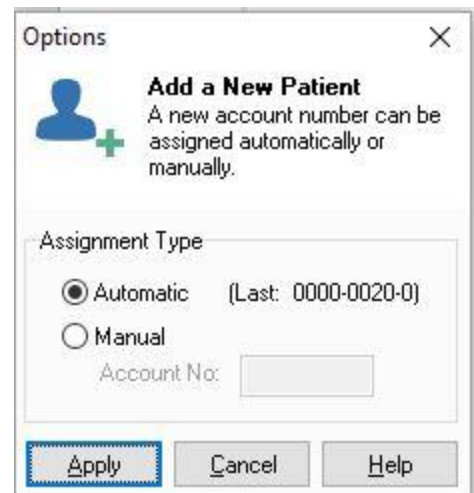
4. How do I get help in *Manager*?

- Click on the **Help** button in  the upper left corner of *Manager*. A help screen will then be displayed on the screen.
- Or press the **F1** key from within anywhere of the program to also display help.
- **NOTE:** Whenever additional help is needed during this tutorial, use these help screens to answer your questions. The help screens will describe fields in more detail found in *Manager*.

5. How do I add a new patient?

Click on the **Open/New Patient File** button  in the upper left corner of *Manager*.

- The **Search Patient** dialog box will appear on the screen. Click on the **new** button to add a new patient.
- The **Add a New Patient** dialog box will appear on the screen (see picture at right). Click on **Apply** to add a new patient.
- The next screen that will appear is the **General Information Screen**. Here you can start entering the patient's general information. See topic 6 below to understand the **General Information Screen** plus all of the other six screens found in *Manager*.



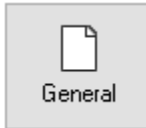
Exercise: Add a new patient with the name **Myra Backhurts**. Enter an address along with her personal information on the **General Information Screen**. Don't forget to choose a doctor for this patient.
Note: This data must be entered, as it will be used later in this tutorial.

6. What do the screens mean in *Manager*?



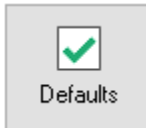
- There are eight information screens found in *Manager*: **General, Defaults, Condition, Coverage, Ledger, Letters, Retention, and Images**.. Each of these screens can be accessed

by clicking on the large buttons at the top of the screen (or pressing function keys F2 thru F8 respectively). Note: These buttons and screens only appear when a patient's file has been opened or when you are in the process of adding a new patient.



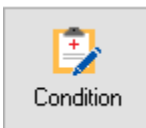
General

General Information Screen - This screen consists of all of the patient's general information. For example, name, address, date of birth, employment, doctor, general notes, etc.



Defaults

Defaults Screen - This screen contains all defaults regarding the patient's billing. Such as, **Credit Limit**, **Service Multiplier** (this is used to multiply services by a percentage when applied in the patient's ledger), application of **Interest** and **Tax**, etc. When setup correctly, this screen will also contain the **X-Charge Credit Card** auto payments defaults for the selected patient.



Condition

Condition Information Screen - This screen contains all information regarding the patient's condition. For example, diagnosis, diagnosis history, cause of injury, and dates relating to the patient's condition. **Note:** This screen consists of a tab page with two tabs located near the top of the screen called **Diagnosis** and **Other**. Simply click on these tabs to view the patient's condition information.



Coverage

Coverage Information Screen - This screen consists of all information regarding the patient's coverage. Such as, **Billing Group**, **Copay**, **Coinsurance**, **Deductible**, **Insurance Company**, **Policy Information**, **Insured's Information**, etc.. This screen consists of a tab page with three tabs located on the upper right side of the screen called **Insurance**, **Insured**, and **Other Info**.



Ledger

Ledger Information Screen - This screen displays the **Patient**, **Insurance**, and **Attorney** ledgers. All patient services are entered in the **Patient** ledger and of those services that are covered by Insurance; the appropriate amounts are automatically transferred to the **Insurance** ledger (depending on the amount of **Copay** or **Coinsurance** specified on the **Coverage Information Screen**). Patient, Insurance, and Attorney Payments are also entered on this screen. The **Patient**, **Insurance**, and **Attorney** balances and **Ledger Notes** are also displayed on this screen.



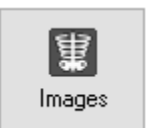
Letters

Letters Information Screen - This screen contains information regarding letters sent or to be sent to the patient using word processing. **Merged**, **Tagged**, **Series**, **Holiday**, **Thank You**, and **Welcome** letters are either assigned or printed on this screen. **Note: A version of Microsoft Word 2007 or newer must be installed on your computer before you can use any of the word processing features on this screen.**



Retention


Retention Information Screen - This screen holds additional information that your clinic may want to keep track of, such as, Referral Source, Major Complaint, etc.. This screen will display a tab page with two tabs named **Retention** and **User**. The **User** tab contains a page of fields defined by the user (you).



Images

Images Screen - This screen contains electronic images and documents for a specific patient. All documents and images (including radiology DICOM files) can be imported or scanned into this screen. These documents and images can be viewed in a thumbnail or list format. **Note, a scanner must be installed on your computer or network to use the scanning feature on the images screen.**

7. How do I save a patient's file?

- To save a patient's file, click on the **save** button  in the upper left corner of the screen or choose **File|Save** from the Main Menu of *Manager*. If changes have been made to a patient's file, *Manager* will automatically ask you if you want to save changes when exiting the patient's file. However, if you would like to save as you go, simply click on the **save** button. **Note:** The first and last name of the patient must be entered before saving a new patient.


Exercise: If you have not saved changes made to **Myra Backhurts** file then click on the save button. **Note:** The save button will only be highlighted if changes have been made to a patient's file.

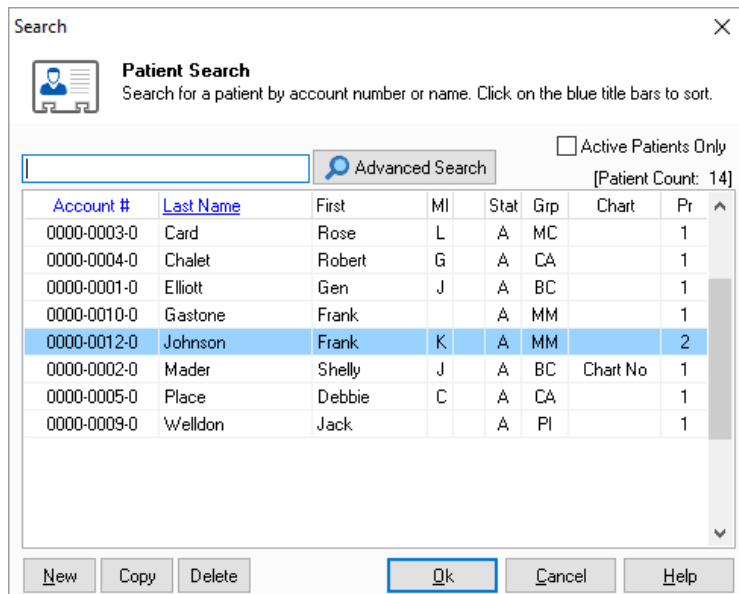
8. How do I undo changes made in a patient's file?

- *Manager* can undo all changes, since the last save, made to a patient's file.
- To undo changes, choose **File|Undo Changes** from the Main Menu of *Manager*. Alternatively, you could simply exit the patient's file and when asked, "Do you want to save changes?" click on the **No** button.

Exercise: Change **Myra Backhurts** address, and then click on the **File|Undo Changes** to cancel changes. The address should return back to the way it was before the changes were made.

9. How do I search for and load a patient's file?

- Click on the **Open/New Patient File** button  in the upper left corner of *Manager*.
- The **Patient Search** dialog box will appear on the screen (see picture below).
- There are two ways to search for a patient's file, by Account Number or by Patient Name.



Account #	Last Name	First	MI	Stat	Grp	Chart	Pr
0000-0003-0	Card	Rose	L	A	MC		1
0000-0004-0	Chalet	Robert	G	A	CA		1
0000-0001-0	Elliott	Gen	J	A	BC		1
0000-0010-0	Gastone	Frank		A	MM		1
0000-0012-0	Johnson	Frank	K	A	MM		2
0000-0002-0	Mader	Shelly	J	A	BC	Chart No	1
0000-0005-0	Place	Debbie	C	A	CA		1
0000-0009-0	Welldon	Jack		A	PI		1

Search by Account Number – In the **Search Field** located at the upper left corner of the **Patient Search** dialog box, enter the account number of the patient. *Manager* will then search in the list for a patient with this account number. For example, if the account number is 0000-1629-0 then enter **1629** in the **Search Field**. Note: Leading zeroes of the account number do not have to be entered, as these numbers are for display purposes only. However, the last digit (the ninth) in the account number can be optionally entered. This number can have a value of 0 thru 9 and represents the patient's family members with the same first eight digits of the account number. This topic is explained in more detail in the **Patient Search** help of *Manager*.

Search by Last Name – To search for a patient by last name, simply enter the first couple letters of the patient’s last name in the **Search Field** located in the upper left corner of the **Patient Search** dialog box. *Manager* will search in the list for patients with the same first characters entered in the **Search Field**. Note: The more characters you enter, the more precise the search will be. If you would like to pin point your search, you could also include part of the patient’s first name in the search (entered in the format Last, First).

- Note: The first character entered in the **Search Field** will determine how the list is sorted. For instance, if the first character entered is of type numeric (0-9), then the list will sort by account number. Likewise, if the first character is of type alphabetic (A-Z, a-z), then the list will sort by the patient’s last name. However, you can manually sort the list box by clicking with your mouse on either of the blue title bars found on the **Patient Search** dialog box.
- After a patient is found using one of the search methods described above, simply click on the **Ok** button to load the patient’s file. Alternatively, you could double click with your mouse on the highlighted patient or hit the enter key on your keyboard to load a patient.

Exercise: Search for our new patient, **Myra Backhurts**, by typing in the **Search Field** the letters **back**. The list box should have Myra’s record highlighted. You could also be more specific with your search by including her first name. For example, you could enter the letters **Back, My**. Once Myra’s record is highlighted, press enter to select the file.

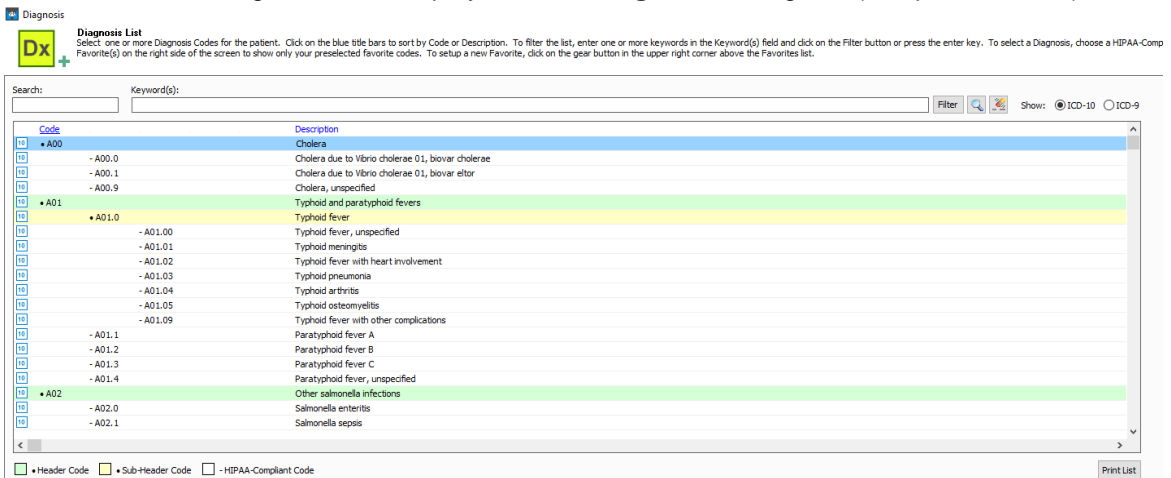
10. How do I enter the patient’s diagnosis?

- With a patient’s file open, click on the **Condition** button found at the top of *Manager*.
- On the **Diagnosis** tab page (click on the **Diagnosis** tab at the top of the page), there will be two list boxes displayed with titles **Current** and **History**.

Current – The **Current** list box displays the patient’s current diagnosis.

History – The **History** list box displays the effective dates plus the patient’s past diagnoses. See help in *Manager* to get a more detailed description of the **History** list box.

- To add to the patient’s current diagnosis, click on the **Add** button located in the lower left corner of the screen. *Manager* will now display the **Add Diagnosis** dialog box (see picture below).



- The **Add Diagnosis** dialog box displays a list of diagnosis codes plus **the Add to Patient's Current Diagnosis** list box. Just like the **Patient Search** box, there is a **Search Field** located at the upper left corner of the dialog box along with a keyword box. The search box is dedicated for the diagnosis codes specifically only. An example would be M34.0. The keyword box is dedicated to words of the specific code. For example if you know some keywords of the code but not the actual code, keyword search is where you do that.
- To search for a diagnosis code, click on one of the blue title bars found at the top of the diagnosis list to specify how you want the list sorted (click on **Code** to sort by Diagnosis Code, or click on **Keyword** to sort by Diagnosis Description. The blue title bar that displays an underline specifies the current sort order.) Simply scroll through the list or enter the Diagnosis Code or Description in the **Search Field** to find a diagnosis.
- Once a diagnosis code is found in the list box, simply hit **enter** on your keyboard to add the diagnosis to the **Add to Patient's Current Diagnosis** list box.
- If you have additional diagnosis codes to enter, repeat the two steps above until you have entered all of the patient's diagnosis codes. Click on **Ok** to add the diagnosis codes found in the **Add to Patient's Current Diagnosis** list box to the patient's file.
- The patient's current diagnosis should now be displayed in the **Current** list box on the **Condition** screen.



The first twelve diagnosis codes in the Current list box will display this icon. This icon specifies which diagnosis codes will be printed on the patient's HCFA Claim Form.



The diagnosis codes that display this icon represent diagnosis codes only on file. That is, these diagnosis codes will not print on the patient's HCFA Claim Form because it is more than 12 diagnosis codes which is the max allowed on HCFA form.

Exercise: Click on the **Add** button to add five diagnosis codes to **Myra Backhurts** current diagnosis. Choose any five from the defined diagnosis list.

11. How do I enter the patient's current condition information?

- With a patient's file open, click on the **Condition** button found at the top of *Manager*.
- On the **Other** tab page (click on the **other** tab at the top of the page), there will be three group boxes with titles **Condition related to**, **Date(s)**, and **Other**.
- On this page enter the information regarding the patient's condition. For example, **Date of Onset**, **Same/Similar**, etc.

Exercise: Let's say **Myra's** condition is related to a car accident she was in yesterday in your state. Therefore, under the **Condition related to** group box, check the **Auto Accident** check box and enter your state in the **Place (State)** field. Under the **Date(s)** group box enter the **Date of Onset** (yesterday's date), and enter **No** in the **Same/Similar** field. Save your work by clicking on the **save** button.


12. How do I enter the patient's coverage information?

- With a patient's file open, click on the **Coverage** button found at the top of *Manager*.

- Located on the left side of the screen is the **Coverage Type** group box. This box contains the patient's **Billing Group**, such as, Cash, Medicare, Major Medical, Personal Injury, etc.. For **Billing Groups** that represent coverage, the **Copay** and **Coinsurance** fields will also be displayed on the screen. Note: The radio buttons preceding the Copay or Coinsurance (Coins) specifies which type of pre-payment is required by the patient's insurance company. In the fields that follow, enter the patient's copay or coinsurance, and deductible amounts.


Exercise: Let's say **Myra** is a Medicare patient and her **Copay** is **\$15** with a **Deductible** of **\$0.00**. Therefore, choose **Medicare** as the **Billing Group** and click on the **Copay** radio button and enter **\$15** in the **Copay** field. Since the **Deductible** is **\$0.00**, there is no reason to enter this amount. .

- Located on the right side of the screen is the **Primary, Secondary, Third, and Attorney** Coverage tab pages. Within each tab page there contains the **Insurance, Insured, and Other Info** tab pages. **Note:** This section of the **Coverage** page is only used when the patient has Insurance Coverage or when there is an Attorney.

Insurance – This tab page contains the patient's insurance information, such as, **Insurance Company, Policy Number**, etc. To choose an insurance company, click on the search button 

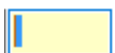
Insured – This tab page contains the insured's information. For example, **Insured's Name, Address, Date of Birth**, etc.

Other Info – This tab page contains other information regarding the patient's coverage.

Exercise: Select the **Primary** tab and choose **Medicare** from the insurance company listing on the **Insurance** tab page (click on the search button to find **Medicare**). Then enter a **Policy Number** and an **Effective Date** of the policy. Now click on the **Insured** tab and under **Insured Is** select **Self** (means the patient is the insured). Click on the **Apply Insured Information** button 

to apply the insured's information automatically. Since the patient is the insured, the information you entered on the **General Information Screen** should automatically be filled in the insured's fields. For instance, **Name, Address, Date of Birth**, etc. Save your changes by clicking on the **save** button.

13. How do I enter services into the patient's ledger?

- With a patient's file open, click on the **Ledger** button found at the top of *Manager*.
- Enter a patient's service by typing in the appropriate service number into the yellow **Service Entry** field  in the lower left corner of the screen.


Exercise: Enter **98940** into the **Service Entry** field. The service and the amount that represents **98940** will be displayed to the right of the field. To apply this service to the Patient Ledger, simply hit enter on your keyboard. Since **Myra** has insurance coverage, her copay of \$15 is applied to her ledger (Patient Ledger) and the remainder of the charges is applied to her insurance company (Insurance Ledger) with an **Apply to Insurance** transaction.

Note: The number **98940** represents one of the services listed in this demonstration version of *Manager* (You can display this list by clicking on the **Look Up** button next to the yellow **Service Entry** field.). Keep in mind that this list can be completely customized by your clinic, and it can be printed in several different orders. This can be accomplished in the VersaSoft **CHIRO – Configuration** program.

14. How do I read the ledger balances?

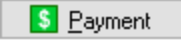
- With a patient's file open, click on the **Ledger** button found at the top of *Manager*.
- The Patient, Insurance, and Attorney running balances are shown on the right side of each transaction listed in each of the ledgers (This column is found under the title **Balance**).
- At the bottom of the ledger screen, the balance bar is also displayed (see picture below).

Patient	\$0.00 ^c	Insurance	\$0.00 ^c	Attorney	\$0.00 ^c	Total	\$0.00 ^c	▲
Copay	\$25	Cur Ded Bal	\$0.00	Cov Bal	\$0.00	Visits	A:0, T:14	▼

- The **Patient**, **Insurance**, **Attorney**, and **Total** balances are displayed at the top of the **Balance** bar. The **Total** balance always equals the sum of the **Patient**, **Insurance**, and **Attorney** balances (**Total** balance = **Patient** balance + **Insurance** balance + **Attorney** balance.). NOTE: The symbol, , is a flag that represents balances over 120 day old.
- The **Balance** bar also lists the patient's **Copay Amt** (Copay Amount) or **Copay %** (Copay Percent), **Cur Ded Bal** (Current Deductible Balance), **Cov Bal** (Coverage Maximum Balance) or **OOP Bal** (Out of Pocket Maximum Balance), and **Visits** count (A=B/C where B=Total Annual Visits, and C=Total Annual Visits Allowed; T=Grand Total Visits).
- Click on the up and down arrows at the right of the **Balance** bar to display other balances and amounts. See *Manager* Help for further details.

Exercise: Note that **Myra's Patient** balance is **\$15** and her **Insurance** balance is the remainder of the **98940** service charge. The **Total** balance is the sum of the two balances.

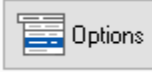
15. How do I enter a payment from the patient?

- With a patient's file open, click on the **Ledger** button found at the top of *Manager*.
- Choose the **Patient** Ledger (click on the tab at the top of the page named **Patient**).
- Click on the **Payment** button  located at the upper right corner of the screen.
- Choose a type of receipt of payment, **Cash**, **Check**, or **Credit/Debit Card**. When entering a check or credit card, you will be asked to enter additional information besides the amount, such as, the check number, type of credit card, card number, expiration date, etc.

Exercise: Let's say **Myra** paid her **Copay** of **\$15** with a check (**Check Number = 123**, **Bank Number = 91-212**). Enter these amounts using the **Payment** button on the **Patient Ledger**.

After entering **Myra's** check, note that her balance is now **\$0.00**.

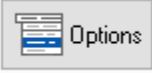
16. How do I print a single patient statement?

- With a patient's file open, click on the **Ledger** button found at the top of *Manager*.
- Click on the **Options** button  found in the lower right corner of the screen.
- From the Popup Menu choose **Print|Statement|Claim**.
- The **Print Statements/Claims** dialog box should now appear on the screen.
- Under **Details** on the **Patient Statements** tab page choose a date range to print. For example, select **All Transactions**. You can also choose to include the patient's **Diagnosis, Dunning Messages**, and a **Goodwill Message**.
- Click on the **Build** button to build the patient statement.
- The **Print Patient Statements w/Labels** will now appear on the screen. Under the **Statement** group box click on the **Print** button to print the statement. If you would like to preview the statement first, select the **Preview** button instead of the **Print** button.
- **Note:** A Statement is printed in *Manager* only when a statement is needed for a specific patient. When you have to print a group of statements, this is performed in the *For Chiropractors Only – Billing* program.

Exercise: Print a statement for **Myra** using the steps listed above. After printing the statement, *Manager* will ask you "Do you want to apply the 'Statement Printed' label to the Ledger?". Answer yes to this question. Basically the **Statement Printed** label is a transaction that is applied to the Patient Ledger which specifies that a statement was printed.

Note: If you printed the statement on a dot matrix or a non-laser type printer, you may have noticed that the statement prints very slowly. This is due to the high graphics of the patient statement that is selected in Manager. In this case, a Generic Text Print Driver must be setup in Windows and the Manager's Generic Statement Type must be chosen to speed up this process. Call Versatile Software Systems to help setup this statement print type.


17. How do I print a single insurance claim?

- With a patient's file open, click on the **Ledger** button found at the top of *Manager*.
- Click on the **Options** button  found in the lower right corner of the screen.
- From the Popup Menu choose **Print|Statement|Claim**.
- The **Print Statements/Claims** dialog box should now appear on the screen.
- Click on the **Insurance Claims** tab at the top of the dialog box.
- Choose to **Print All Unbilled Charges, Reprint All, Reprint a Claims Range, or Reprint Claim**.
Print All Unbilled Charges – Choose this option to have *Manager* assign new claim numbers to all unbilled charges.

Reprint All – Choose this option to re-print all claims listed in the claim list box.

Reprint a Claim Range – Choose this option to re-print a range of claims listed in the claim list box.

Reprint Claim – Choose this option to re-print a single claim listed in the claim list box.

- Click on the **Build** button to build the claim(s).
- The **HCFA Claim Form(s)** dialog box will now appear on the screen. Here you can view and edit any claims before they are printed.
- Click on the **Print Summary, Claims, and Labels** button  to start the printing process.
- Three dialog boxes will appear on the screen: **Claim Summary**, **HCFA Claim Forms**, and **Labels**.

Claim Summary – Click on the **Print** or **Preview** button to print a claim summary.

HCFA Claim Forms – Click on the **Print** or **Preview** button to print HCFA Claim Form(s).

Labels – Click on the **Print** or **Preview** button to print claim form label(s).

Exercise: *Print a claim for Myra using the steps listed above. Note: You must choose **Print All Unbilled Charges** because we have not yet assigned a claim number to the service charge we entered in the ledger. That is, this service is still waiting for a claim number, and to assign one, you must select **Print All Unbilled Charges** then click on the **Build** button.*

*After printing the claim, Manager will ask you "Do you want to apply the 'Claims Printed' label to the Ledger?" Answer yes to this question. Basically the **Claims Printed** label is a transaction that is applied to the Insurance Ledger which specifies that a claim was printed. Note: Double clicking on this label will display the transactions properties, which includes the claim number.*

Note: *If you printed the claim on a dot matrix or a non-laser type printer, you may have noticed that the statement prints very slowly and is impossible to align. This is due to the high graphics of the claim that is selected in Manager. In this case, a Generic Text Print Driver must be setup in Windows and the Manager's Generic Claim Type must be chosen to speed up this process and to allow the claim to be aligned properly. Call Versatile Software Systems to help setup this statement print type.*

This concludes this basic tutorial for *Manager*. Keep in mind that this tutorial was meant to only give you a basic understanding of *Manager*. Advanced topics, such as, applying an insurance check to a claim or claims, merging patient letters, applying advanced account transactions to the ledger, group billing, printing reports and listings, chart notes and appointment book entry are just some of the topics that are taught to you in our training sessions provided by our company.