

Medical Office System

Chapter 9: Printing Insurance Forms

This chapter discusses

- Printing insurance forms
- Batch printing to selected printers
- Troubleshooting insurance form problems

Introduction

Insurance forms can be printed individually, from the patient record in daily input, and in a batch (all outstanding claim forms at once) from the MOS Main Menu press **3**. This will display the Print Insurance Form Menu. Printing claim forms individually does not age them. For the claim forms to age correctly, they must be printed in a batch once a month. This chapter describes batch printing. For information on printing insurance forms individually, see Page 6-27, "Daily Input."

Note: *The standard HCFA form must print 85 characters across at 10 pitch. Many 8.5" carriage printers do not allow this width. For printing insurance forms, a 15" carriage printer with tractor feed forms is required. We have found that sheet feeding individual pre-printed forms does not supply the most reliable printing. The paper may shift slightly causing the information to miss the small boxes on the forms.*

Instructions

When printing in a batch, specify all claim forms that use specific formats before printing the remainder of the claims on the standard HCFA form (or on a user-defined "generic" form). In other words, print the forms for the carriers that require special forms just for their claims, such as Medicaid or Blue Shield. After all the special forms have been printed, select the generic HCFA form that will print all remaining claims that have not been printed on special forms.

Before starting, make sure that if your system does not include a spooler, the printer is on-line and the correct insurance forms are loaded in the printer. If your system does have a spooler, either print the forms immediately or wait until later (to wait, simply turn off the printer).

Multi-User Print Spooler

On multi-user systems, the forms can be printed in the background (in other words, it is possible to exit from the operation but the program continues generating and printing the report). To put forms in background, type **!** **G** as soon as you've finished answering all prompts. Then the main menu is displayed.

Note: *Do not log off the system until the background printing is complete. This can cause your print job to be aborted.*

Note: *Don't enter background mode if there are remaining prompts to be answered -- the program will wait, in background, for answers to prompts that you never saw, and never finish printing the report.*

It is usually safe to switch to background as soon as you've finished answering the selection prompts and the selection counting begins. However, we suggest that the forms be run normally the first time to see if anything requiring an answer appears while the program is generating the report. Anytime after the last question the print job can be put in the background.

Procedure

- At the main menu, press **3** for Insurance Forms Menu. This menu is displayed:

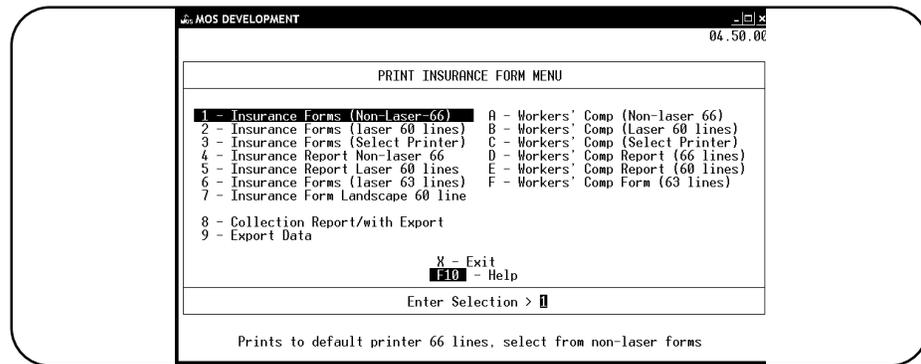


Figure 9-1 : Insurance Forms Menu

- Select the appropriate insurance form size. The New options for Worker's Comp will do everything the same as the insurance forms, except it will only select claims that are "WORK REL=Y" on the claim. This will help to batch the worker's comp claims separately if that is necessary.

Insurance Forms - Non-Laser 66 - This will create a form that is 66 lines long. This is the same as the old selection on the previous version. Just because this says non-laser does not mean it will not printer on a laser, however, most laser printers will not print 66 lines of text on a sheet of paper at 6 lines per inch which is required for HCFA 1500.

Insurance Forms (Laser 60 lines) - This will create a form that is 60 lines long. This will only list forms that were marked for laser printers.

Insurance Forms (Select Printer) - This will create a form that is 66 lines long. It will always have a printer selection option. The other options will only have a select printer option if the Practice Setup is set to have printers selected for reports.

Insurance Forms (laser 63 lines) - This can be helpful for some laser printers to allow all the form to print on the paper.

Batch Insurance Forms (SELECT PRINTER)

When selecting "3" from the Print Insurance Forms Menu, a printer selection is offered. This will start by asking for a selection from the printers defined in your Printer Maintenance function. (See Printer Configuration, Chapter 22 for more information about configuring printers.)

Move the cursor until the correct printer has been highlighted and press **ENTER**. A box is displayed showing your choice with the options:

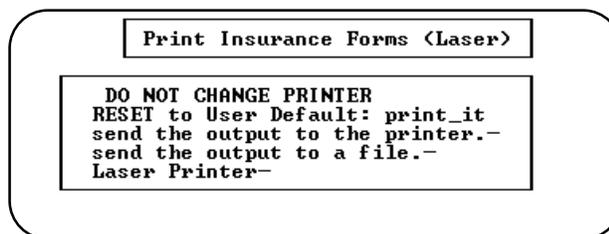
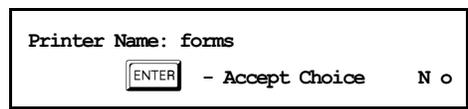
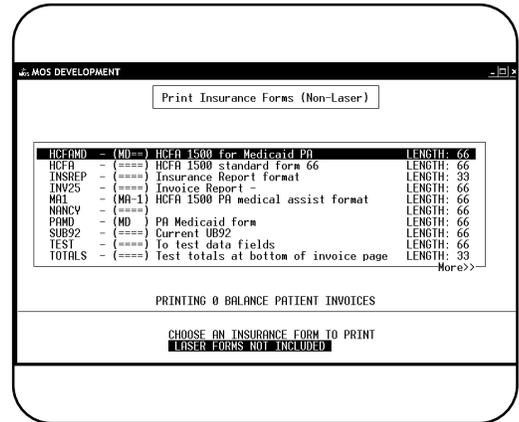


Figure 9-2 : Selecting a Printer



If the printer indicated is the correct one, press **ENTER**. Press **N** to repeat the selection of a printer. The default system printer is sometimes used to print forms directly without spooler control. If you are using the system default printer and directing your insurance forms to that device without spooler control be careful when printing other reports. The job sent to the spooler will not recognize that the printer is busy and will send the print job to the printer at the same time your forms are printing. To avoid this conflict the print spooler can be disabled while printing insurance forms and the print jobs will be held in the computer until the printer is enabled. (To disable and enable the spool, refer to the commands “disable” and “enable” in your Unix/Xenix manual.)

- Now it is important to select the correct insurance form layout. Highlight form that should be selected. Following the name of the form, the carriers to be printed are shown. If a specific carrier code is shown, only forms for that carrier are selected. If the code is followed by "=" signs, only carriers with the first letters the same will be selected. Finally, if the selection shows all "=" then all carriers will be selected to print on this form. Remember that when the particular invoice is selected to match a form and printed it will not be automatically selected until the next cycle of forms is sent.



Note: *If you want to print a specific, user-defined form for some records and the HCFA for the rest, you have to run the program at least twice -- the first time to get all the specific assignments and the second time to print the remainder on the HCFA form.*

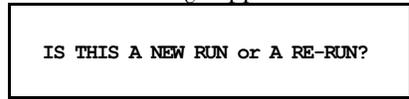
Figure 9-3 : Selecting an Insurance Form

- Then this prompt appears:



Enter an insurance code to select only forms for that carrier. Even if the form is generic, this can be useful to select only forms for Medicare or Blue Shield.

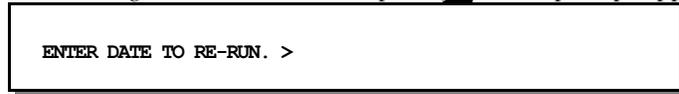
- Then this message appears:



If the run is new, answer **N** or press **ENTER**. Skip to Step #7 to continue with new claims.

Rerunning Insurance Forms

- If rerunning the insurance forms, press **R**. This prompt appears:



Type the date that the batch was printed.

Note: *When rerunning insurance forms, only the assignment forms, not the patient-responsible forms, are printed. See step 5.*

- If selecting NEW forms, the following prompt appears:

PRINT INSURANCE FORMS FOR PATIENTS? Y or N >

If your practice does not accept insurance assignments, it is still possible to print insurance forms as a courtesy to your patients (making it easier for them to get reimbursed), the forms will not be included in the run unless the answer to this prompt is Y.

Note: *Patient-responsible insurance forms are never aged with this function, they age when printed on statements.*

8. This prompt appears for new and rerun batches.

REPRINT OVERDUE INSURANCE FORMS? Y or N >

Enter "Y" to print insurance forms that are overdue based on the number of days given in the practice setup, usually 60 days. This should be selected at least once a month for each carrier to insure that your claims get paid.

Keep in mind that, if the answer is no, the assignments will not be aged. To age the assignments correctly, run this job at least once a month.

Note: *Insurance assignments have an extra 30-day grace period before being reprinted (i.e., and age of "1" means 60 days overdue.)*

9. The next prompt will allow the selection of a group of patients for this run:

ENTER STARTING ACCOUNT CODE:

Fill in the information requested or press for all patients. To start at a certain account code enter that code and all the accounts after, inclusive, will be printed.

Note: *Use this series of prompts to restart an interrupted run. If your printer jams part way into the run, select a rerun for that date and start with the account code of the forms that were not printed.*

10. A question has been added at this point if a resubmit is requested. It will allow the electronic claims that are overdue to be printed also. They can then be sent by paper to the carrier.

Include Electronic Claims With Resubmitted Claims? (Y/N) >

Press Y to include electronic claims in the batch. This can be helpful if you are having difficulty with your electronic claims getting paid in a timely fashion and need to print them for follow-up or paper submission.

11. Then a question will allow insurance forms that have not been printed previously and have a zero balance to be printed. This will be handy for HMO's where the claim is capitated, but still needs to be reported to the HMO with a zero balance.

PRINT ZERO BALANCE NEW INVOICES WITH THIS BATCH: (y/n) >

12. Finally after one form has been generated the following prompt will be displayed:

IS ALIGNMENT CORRECT? >

Answer "Y" to continue printing the report. If your report is spooling, nothing will have printed when this message appears, ignore it. If answering "N", a second copy of the first claim will be generated for each time you press "N". When you finally answer "Y" the report will continue to the end. This will allow you to align the paper in the printer.

The program selects the claims, generates the forms, and prints them.

Troubleshooting Insurance Forms

The insurance forms included with the Medical Office System can be modified by the end user to allow for variations in form requirements for different insurance carriers across the country. In the support calls we receive about this function, the following items might help when there are difficulties printing insurance forms correctly.

- USER Defined fields 501 - 516 can cause a syntax error on line 329 (roughly) if you have a user field on your form but left it blank for a definition. The USER fields are defined on page 1 of your form. Update the form on page 1 and press **ESC**, the screen where the user fields are defined is displayed. Any line that should be left blank should have at least a period (.) in the first column. This will insure that if it is used accidentally somewhere it will not cause an error.
- The USER field 508 by default on the HCFA form is used to blank out data that is not required for MEDICARE. It will be listed after a field that should be erased for a MEDICARE claim. For example, the date of the service is stored as 05/01/94 but Medicare does not want the slashes so 508 is used to overlay the positions where the slashes would be printed.
- You will also notice that user field 508 the data field is space filled with a period in the last character position. This is to allow you to use up to 29 blanks on top of anything you would like to erase.
- Print code 60 has been inserted at the beginning of the format for each insurance form. This code is usually not assigned a value in the print code table by default and will allow your form to print as it always did. However if your printer needs some codes to insure that the insurance form is at 10 CPI, 6 lines/inch, etc. then enter those codes in print code 60 to insure that your insurance forms will print correctly. For example, on my printer I like to default the pitch to 16.7 to allow most of the reports I print to print on narrower paper. Using print code 60 will insure that my forms will always print at the correct pitch.
- The standard HCFA format does not work well on laser printers in our experience at this time. The form requires characters in 85 columns at 10 CPI, which most printers do not support. And if the forms are feed from a sheet feeder, you may find that the printing is not placed exactly the same each time due to minor differences in the way the paper feeds through the printer. These difficulties may be solved as the technology improves, but at this time we do not recommend this type of printer for insurance forms.
- Your insurance forms and invoices can now include up to 25 service lines per page. The additional lines are not included in the default format included with the Medical Office System. It is necessary for these to be added by the practice if required.
- The setup fields for the insurance form will allow the date fields to be changed to any format necessary. For example, a YYMMDD (971225) must be displayed as YYYYMMDD (19971225), it is only necessary to put the correct option on the insurance

form file. A date can be displayed MM DD YYYY (12 25 1997) for an insurance form that does not need the slashed but still needs the space.

Insurance Reports

(More than one claim per page in a report type format)

Return to the MOS Utility Menu and select Define Print Formats. Then press **1** and **ENTER** to move to a record. Then select "I-Import" and highlight "insrep~" and press **ENTER**. The "insrep~" form will be added to your list of choices. This is the format you will use to print your insurance reports. You can change the insurance company field to select the carrier code for this carrier. You can make modifications to the general format of the report to change columns, add information or adjust the report as needed.

Be sure to convert the format when you return to the Define Print Menu.

Finally, to save the claims for the entire month, use the Delay Assignment Option. Select Period End Menu and then select "D - Delay Assignment Claims" and supply the information requested. This option allows you to indicate that all claims for a specific carrier should be held until a given date. Enter the first or last day of the month and the carrier ID where indicated. Refer to the manual for more information about this function. Then when that day comes remove the hold and print all the claims for this carrier. Then each month you will be able to Delay these claims until the end of the next month. All other claims will print whenever you select all claims without the necessity of putting individual claims on hold and releasing them. Adding all services for a patient to the same claim will not be necessary. The report will list them by claim.

This report will age and treat the claims just the same as if we printed an insurance form. Changing the fields on the Print Format can modify the report called "insrep~". If your system does not have this form, try the IMPORT option in Define Insurance/Invoice Form. It should have been part of the import file sent with the upgrade.

The critical data that affects the way this works is to fill in the Print Lines set at 33. Use the break down below to adjust the different areas of the report.

Rules as follows:

- ▶ Anything on lines 1-8 will print in the heading section of the report.
- ▶ Anything on lines 9-34 will print the body of the report, or the claim detail required.
- ▶ Anything on lines 35-37 will print at the end of the claim or after 25 line items which ever come first. Use this for totals as shown on the example.
- ▶ Anything on lines 38-41 will print at the end of the report such as the report total.

We have enhanced the Insurance Form menu to include the following items:

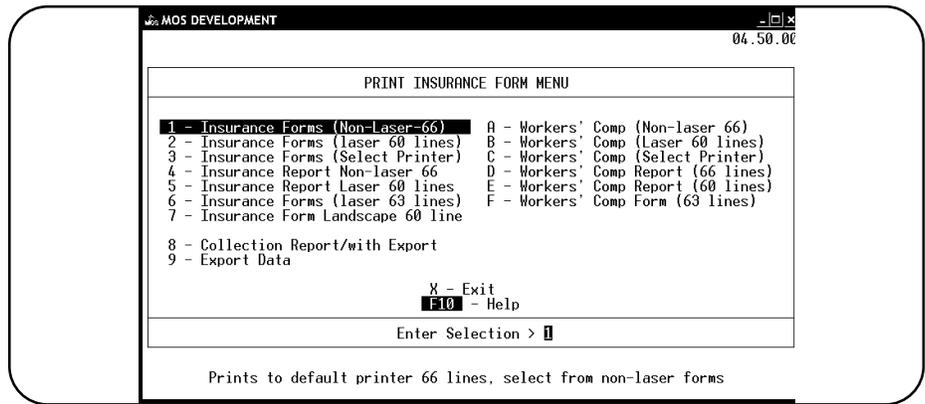


Figure 9-4: Insurance Form Menu

Use **4** to print the report on a dot-matrix with a 66-line page. We will ask that you select the printer from the list of available printers.

Use **5** to print the report on a laser printer with a 60-line page. We will ask that you select the printer from the list of available printers.

On your printer setup the print code 62 is used to initialize this form. That code can be used to send any special printer instructions. MOS support will be glad to help you refine this.

Each form is available in either a 66-line or a 60-line format. Use the 66 line format for a dot matrix printer. The 60 line format will print on a laser printer easily.

Using a different carrier code for the two types of claims will make it easy for you to separate them. When you print the insurance report, select the appropriate carrier for each batch.

Notes:

SAMPLE INSURANCE REPORT

This is a sample of the “Insurance Report” format. Notice that each service is listed for the patient and totals are given by patient and then a total for the carrier. This would usually be designed to select only one insurance carrier at a time and the services for that carrier are put on HOLD until the end of the week or month and then the report is run to include all the data since the last report.

Your Practice Name
123 Main Street
Suite 5
Yourcity PA 12345

DATE 09/04/96

(412) 835-9417

LOCAL 705 CLINIC
TAX ID 123456789

DATE	PROCEDURE DESCRIPTIONS	CHARGE

Helena Adells	555-38-5467	
08/07/94 NEW PT, OV,MOD.	99203	80.00
ACCOUNT	1 INVOICE 129	TOTAL CHARGE 80.00
Helena Adells	555-38-5467	
09/27/94 NEW PT.OFFICE CONSULT-LOW	99242	80.00
09/27/94 NEW PT, LIMITED OFFICE VISIT	99201	30.00
09/27/94 RANDOM BLOOD GLUCOSE	82947	10.00
10/28/94 RANDOM BLOOD GLUCOSE	82947	10.00
ACCOUNT	1 INVOICE 133	TOTAL CHARGE 130.00
Helena Adells	555-38-5467	
12/14/94 NEW PT, OV,MOD.	99203	75.00
ACCOUNT	1 INVOICE 157	TOTAL CHARGE 75.00
Margaret B Rabbini	555-20-1520	
01/17/95 OFFICE VISIT, LOW/MOD	99202	55.00
ACCOUNT	5 INVOICE 159	TOTAL CHARGE 55.00
Margaret B Rabbini	555-20-1520	
01/17/95 NEW PT, OV,MOD.	99203	80.00
01/17/95 OFFICE VISIT, LOW/MOD	99202	55.00
ACCOUNT	5 INVOICE 160	TOTAL CHARGE 135.00

	TOTAL CHARGES	475.00