

Preface

Welcome to the fifth edition of *Computers in the Medical Office*. This text/workbook introduces you to the concepts and skills you will need for a successful career in medical office billing. Medical biller is one of the 10 fastest-growing allied health occupations. This employment growth is the result of the increased medical needs of an aging population, advances in technology, and the growing number of health practitioners.

YOUR CAREER IN MEDICAL BILLING



Medical billing specialists play important roles in the financial well-being of every health care business. Billing for services in health care is more complicated than in other industries. Government and private payers vary in payment for the same services, and healthcare providers deliver services to beneficiaries of several insurance companies at any one time. Medical billers must be familiar with the rules and guidelines of each health care plan in order to submit the proper documentation so that the office receives maximum appropriate reimbursement for services provided. Without an effective billing staff, a medical office would have no cash flow!

Administrative duties in medical offices are becoming more dependent on technology. Computers are now used in almost all medical practices, for a variety of administrative and clinical functions. Anyone who seeks a job in medical billing will find that an understanding of the billing process and hands-on experience with billing software are often prerequisites to being hired. Although this text/workbook features Medisoft Advanced Version 11 Patient Accounting, its concepts are general enough to cover most administrative software intended for health care providers. Students who complete *Computers in the Medical Office* should be able to use other medical administrative software with a minimum of training.

In addition to specialized knowledge about medical billing and computer skills, you will also need to possess excellent customer service skills to succeed in this field. Even though they are not involved in the actual process of providing medical care, medical billers come in contact with clients, insurance companies, and patients. For example, incoming calls from patients who have questions regarding a charge are often directed to the billing staff, who must be able to communicate effectively with all types of people.

Medical billing is a challenging, interesting career, where you are compensated according to your level of skills and how effectively you put them to use. Those with the right combination of skills and abilities may have the opportunity to advance to management positions, such as patient account managers, physician office supervisors, and medical office managers. The more education the individual has, the more employment options and advancement opportunities are available. Individuals who have practical experience using computers and patient billing software will find themselves well prepared to enter this ever-changing field.

OVERVIEW

Computers in the Medical Office is divided into four parts.

Part 1, "Introduction to Computers in the Medical Office," covers the general flow of information in a medical office and the role that computers play. Instructors may wish to use the first part as a review or, if students

have had other courses in computers, they may wish to start directly with Part 2. A test has been provided in the Instructor's Manual to determine the level of students' familiarity with computers.

Part 2, "Medisoft Advanced Patient Accounting Training," teaches students how to start, input data, and use Medisoft to bill patients, file claims, record data, print reports, and schedule appointments. The sequence takes the student through Medisoft in a clear, concise manner. Each chapter includes a number of exercises that are to be done at the computer. These exercises give the student realistic experience using an administrative medical software program.

Part 3, "Applying Your Knowledge," completes the learning process by requiring the student to perform a series of tasks using Medisoft. Each task is an application of the knowledge required in the medical office.

Part 4, "Source Documents," gives the student the data needed to complete the exercises. These forms, including patient information forms and encounter forms, are similar to those used in medical offices.

COMPUTER SUPPLIES AND EQUIPMENT

The Student Data Template CD-ROM that comes with the text/workbook provides a base of case study information. Other equipment and supplies needed are as follows:

- ◆ PC with 500 MHz or greater processor speed
- ◆ 256 MB RAM
- ◆ 500MB available hard disk space (if saving data to hard disk)
- ◆ CD-ROM 2X or faster disk drive
- ◆ External storage device for storing backup copies of the working database
- ◆ Mouse or compatible pointing device
- ◆ Windows 2000 or Windows XP operating system.

Medisoft™ Advanced Version 11 Patient Accounting is available to schools adopting *Computers in the Medical Office*. Information on ordering and installing the software is located in the Instructor's Manual that accompanies the text/workbook.

TO THE STUDENT

Computers in the Medical Office includes a tutorial and a simulation. Once you learn how to operate the Medisoft Advanced Version 11 program by completing the tutorial, you can practice those skills by working through the simulation. Both the tutorial and the simulation use a medical office setting, Family Care Center, to provide a realistic environment in which you can learn how to use the software.

Medisoft is a popular patient billing and accounting software program. It enables health care practices to maintain their billing data as well as to generate report information. The software handles all the basic tasks that a medical biller needs to effectively perform his/her job. As such, Medisoft is an excellent training tool for anyone interested in working as a medical biller. Even if you do not use Medisoft on the job, the skills you learn here will be similar to those skills needed to use almost any medical accounting program. You will learn how to perform the following tasks:

- ◆ Input patient information
- ◆ Enter patient transactions
- ◆ Create insurance claims
- ◆ Produce patient statements
- ◆ Enter payments and adjustments
- ◆ Produce reports
- ◆ Create collections letters



The prerequisite for successful completion of *Computers in the Medical Office* is an understanding of the concepts and procedures for medical coding, billing, and reimbursement. This background can be obtained by studying McGraw-Hill's related insurance titles, the briefer, focused *From Patient to Payment* (Newby) or the longer, comprehensive *Medical Insurance* (Valerius/Bayes/Newby/Seggern). Students must also possess basic computer skills, and familiarity with the Windows operating system.

After completing *Computers in the Medical Office*, students can build on their skills and enhance their qualifications for employment by studying *Case Studies for the Medical Office*, an excellent "internship in a box." *Capstone Billing Simulation* contains a simulation covering two weeks of work in a medical office using Medisoft. In addition to providing activities through which students can practice and reinforce their basic Medisoft skills, the text/workbook introduces new Medisoft training topics which expand their knowledge.

WHAT EVERY INSTRUCTOR NEEDS TO KNOW

What's New in the Fifth Edition?

- ◆ **Medisoft Advanced Version 11** patient billing software, a full-featured software program, is available to adopters.
- ◆ **Student-at-Home Software Medisoft Advanced Version 11** - available as an optional package. This version is an option for distance education or students who want to practice with the software at home. There is a limitation on the number people a student can enter into the software. Otherwise, this is a full working version.
- ◆ **Hands-on case studies** with realistic mix of HMO, PPO, and fee-for-service are included earlier in the text.
- ◆ **New—"On Your Own" hands-on exercises** in each chapter offer guided instruction and proceed from simple to complex. At the end of each chapter, new "On Your Own" exercises provide students with the opportunity to practice applying what they learned in the chapter without guided instruction.
- ◆ **New Chapter "Collections in the Medical Office"** includes laws regulating patient collections, the role of collection agencies, and handling uncollectible accounts in the medical office. Students gain hands-on experience using Medisoft to identify overdue accounts, establish a work list of items that require follow-up, create collections letters, and print reports designed to monitor the collections process.
- ◆ **New organization of chapters** follows the steps in the medical billing process. The ten steps of the medical billing process are introduced in Chapter 1. Subsequent chapters follow the order of work tasks based on this billing process, creating a logical connection between chapters and the flow of on-the-job tasks.
- ◆ **Instructor's Manual** has Medisoft exercise solutions for each chapter. The Instructor Productivity CD-ROM (IPC) is included in the Instructor's Manual. The IPC contains chapter-by-chapter PowerPoint presentations and EZTest test generator. Questions from EZTest can easily be used with eInstruction's Classroom Performance System. The CD also includes Medisoft backup files for Chapters 4-15.
- ◆ **Online Learning Center**, www.mhhe.com/cimo5e includes Power Point Slides, links to professional organizations, Medisoft Newsletter, Medisoft Certificate and Medisoft tips, FAQs and instructions. Also provided for the student review are games, flashcards, and additional questions. Contact your McGraw-Hill sales representative to obtain your Online Learning Center password.

Computers in the Medical Office provides your students with the opportunity to learn and perform the duties of a medical biller, using Medisoft Advanced Version 11 Patient Accounting, a computerized patient billing program. Teaching students how to use a software application such as Medisoft can be a challenging endeavor. For that reason, this text/workbook is accompanied by several teaching and learning supplements.

TEACHING AND LEARNING SUPPLEMENTS

For the Instructor

Instructor's Software Medisoft Advanced Version 11 CD-ROM (007-329853-0) This full working version allows a school to place the live software on the laboratory or classroom machines (only one copy needs to be sent per campus location).

Instructor's Manual with IPC CD-ROM (0-07-311026-4) includes:

- ◆ course overview.
- ◆ information on ordering and installing Medisoft Advanced Version 11 software.

- ◆ chapter by chapter teaching suggestions.
- ◆ software troubleshooting tips.
- ◆ answer keys for the software exercises.
- ◆ end-of-chapter solutions
- ◆ sample printouts of practice exercises
- ◆ correlation tables: SCANS, AAMA Role Delineation Study Areas of Competence (2003), and AMT Registered Medical Assistant Certification Exam Topics.

After you install the software and are ready for your students to begin using the Medisoft Advanced Version 11 program, you can rely on the manual for important information that you can use to help your students work through the exercises in the book.

Instructor Productivity Center (IPC) CD-ROM (packaged with the Instructor's Manual) includes:

- ◆ instructor's PowerPoint® presentation of Chapters 1-11.
- ◆ electronic testing program featuring McGraw-Hill's EZ Test. This flexible and easy-to-use program allows instructors to create tests from book specific items. It accommodates a wide range of question types and instructors may add their own questions. Multiple versions of the test can be created and any test can be exported for use with course management systems such as WebCT, Blackboard, or PageOut.
- ◆ Instructor's Manual.
- ◆ end-of-chapter Medisoft backup files for Chapters 4-15. These backup files can be used to help teachers evaluate students' work at the end of each chapter. By restoring the backup file for a given chapter, the instructor has easy access to the current state of the database when the exercises for that chapter have been completed. The backup files can also be provided to students who misplace or damage their Medisoft data file during the course of the semester.



Online Learning Center (OLC), www.mhhe.com/cimo5e, Instructor Resources include:

- ◆ Instructor's Manual in Word and PDF format.
- ◆ PowerPoint® files for each chapter.
- ◆ links to professional associations.
- ◆ Medisoft tips and frequently asked questions.
- ◆ Medisoft Advanced Version 11 installation instructions.
- ◆ Medisoft Newsletter.
- ◆ PageOut link.

For the Student

Student-at-Home Medisoft Advanced Version 11 This version is an option for distance education or students who want to practice with the software at home.

Student Data Template CD-ROM is packaged with every copy of the text. The data template provides the patient database to complete Medisoft Advanced, Version 11 simulation exercises.

Online Learning Center (OLC), www.mhhe.com/cimo5e.

ABOUT THE AUTHOR

Susan M. Sanderson, senior technical writer for Chestnut Hill Enterprises, Inc., has developed successful products for McGraw-Hill for more than ten years. She has authored all Windows-based editions of *Computers in the Medical Office*. She has also written *Patient Billing*, *Capstone Billing Simulation*, and Medisoft simulations for other medical office/insurance programs. Susan has worked with instructors to site-test materials and has provided technical support to McGraw-Hill customers. Susan has experience in business training, instructional design, and computer-based presentations. She is a graduate of Drew University, with further study at Columbia University.

What Every Student Needs to Know

Many tools to help you learn have been integrated into your text.

CHAPTER FEATURES

What You Need to Know

lets you check whether you understand and recall the information you learned in previous chapters. Mastery of the information listed here is necessary to complete the current chapter.

Learning Outcomes

present a list of the key points you should focus on in the chapter.

Shortcuts

suggest ways to be a more efficient user of the software.

Screen Captures

show how the concepts described in the book actually appear in the medical billing software.

Key Terms

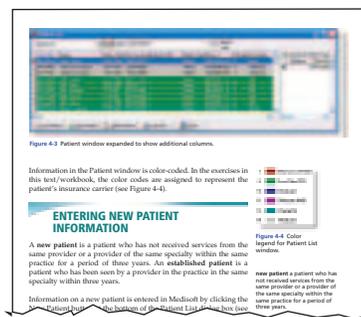
are introduced in the chapter opener and defined in the margin, so you will become familiar with the terms necessary to perform medical billing tasks.

Tips

provide helpful suggestions about using the medical billing software effectively.

Figures

illustrate the concepts in the chapter in a visual format.



COMPUTER PRACTICE

Exercises

provide you with hands-on practice using a medical billing software program. The exercises offer step-by-step instructions for completing each task.

On Your Own Exercises

let you see how well you have learned the medical billing tasks in the chapter. In the On Your Own exercises, you perform tasks in the software without the help of step-by-step instructions.

X What Every Student Needs to Know

Entering Patient Information 4

WHAT YOU NEED TO KNOW

To use this chapter, you need to know how to:

- Start Medisoft.
- Move around the Medisoft menus.
- Use the Medisoft toolbar.
- Enter and edit data in Medisoft.
- Exit Medisoft.

LEARNING OUTCOMES

In this chapter, you will learn how to:

- Use the Medisoft Search feature.
- Assign a chart number for a new patient.
- Enter personal and employer information for a new patient.
- Locate and change information for a patient.

SHORTCUT The quickest way to open a patient or case is to double-click on the line associated with a patient or case.

At the top right side of the Patient List dialog box, there are two radio buttons: Patient and Case. When the Patient radio button is clicked, the left side of the window becomes active. Correspondingly, when the Case radio button is clicked, the right side of the window becomes active. The command buttons at the bottom of the dialog box vary depending on which side of the window is active. When the Patient window is active, the command buttons at the bottom of the screen include Edit Patient, New Patient, Delete Patient, Print Card, and Case.

The Patient window contains the following data: Chart Number, Name, Date of Birth, Social Security Number, Patient ID #2, Patient Type, Phase 1, Provider, Last Name, Billing Code, and Patient Indicator. There is not enough room in the Patient window to display all this information, so only a portion is visible at one time. The additional patient information can be viewed by using the scroll bar, maximizing the dialog box, or resizing the Patient area of the dialog box (see Figure 4-3).

Figure 4-2 Patient List dialog box.

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Good job! I really like the shortcuts that are included. I usually teach them, and it's good to have them included in the text.

Valeria Truitt, Craven Community College

EXERCISE 4-6

Practice searching for and editing information on Hiro Tanaka.

- Open the Patient List dialog box. Confirm that the Field box entry is Last Name, First Name.
- Search for Hiro Tanaka by keying the first few letters of her last name in the Search for box. Notice that as soon as the "TT" is entered, all patients except Tanaka disappear from the Patient List window, because Tanaka is the only patient whose last name begins with "T".
- Click the Edit Patient button.
- Click the Other Information tab.
- Click the triangle button in the Employer box. Click McCoy Manufacturing Inc. on the drop-down list. Notice that the program automatically enters the phone number in the Work Phone box.
- Select Full Time from the Status drop-down list.
- Click the Save button to store the information you have entered.
- Close the Patient List dialog box.

ON YOUR OWN EXERCISES

At the end of each chapter, you will apply what you have learned in an On Your Own exercise. This exercise is similar to the exercises you completed throughout the chapter, with one important difference: step-by-step instructions are not provided. You must rely on what you learned and practiced in the chapter to complete the On Your Own exercise.

ON YOUR OWN EXERCISE 1: ENTERING A NEW PATIENT

October 4, 2010

Lisa Wright is a new patient who has just arrived for her office visit with Dr. Jessica Budzisz. Using Source Document 2, complete the Patient/Guarantor dialog box. (Note: Not all text boxes will have entries.)

Remember to create a backup of your work before exiting Medisoft. Name the file FCCT1.mdb.

CHAPTER REVIEW

Vocabulary Review

questions check your mastery of the key terms presented in the chapter.

Checking Your Understanding

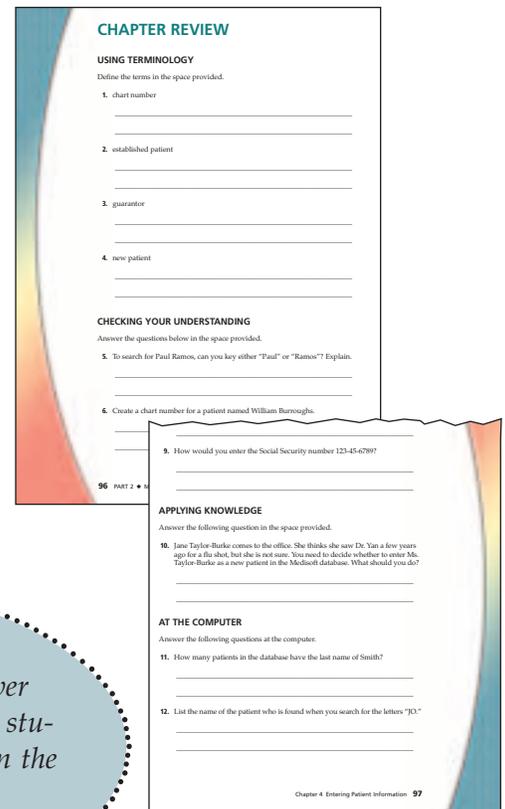
questions confirm that you understand the main topics in the chapter.

Applying Knowledge

questions ask you to use critical thinking skills to apply what you learned in the chapter to different situations.

At the Computer

activities offer you a chance to demonstrate the software skills you learned on the computer.



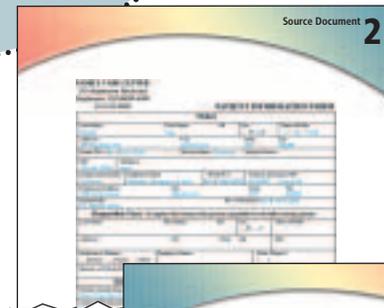
The end of the chapter section is excellent. This section review goes over everything, and I utilize it to see if the students understand what they are doing in the program.

*Suzanne Allen, Sanford
Brown Institute*

SOURCE DOCUMENTS

Source Documents

are facsimiles of typical documents and forms you would work with in a medical practice. These documents provide you with the information you need to complete the software exercises in the book.



GLOSSARY

Glossary

at the back of the book makes it easy to find a definition of a term.



ONLINE LEARNING CENTER (OLC)

www.mhhe.com/cimo5e

The OLC offers additional learning and teaching tools. The site includes additional chapter quizzes, crossword puzzles, concentration games, and installation instructions for Medisoft Advanced Version 11 At-Home software.



I have been using CIMO since it first came out, and it's exciting to see that the text has kept up with the times.

Kelley Fazzone, Blair College