

# QUICKSTART GUIDE



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## 1. CAPABILITIES

QuickClaim is a powerful, yet simple to use, billing system designed for healthcare providers who submit claims to the Ontario Health Insurance Plan (OHIP). QuickClaim also handles reciprocal, direct and third party billing. This guide will get you started with QuickClaim by covering the essentials. You will be prompted by QuickClaim's intuitive design to use functionalities beyond the scope of this guide, and while using QuickClaim the F1 function key will display item-specific help.

Our technical support staff is always happy to introduce you to QuickClaim's powerful utilities, as the need arises, as well as to learn about your billing requirements for future upgrades.

With QuickClaim you can:

- Enter and store claims, and patient information
- Submit claims with a diskette or via EDT to OHIP
- Read OHIP's Remittance Advice Reports from a diskette or via EDT
- Print invoices for direct and third party billing
- Enter, view and print patient appointments
- Automatically read hospital patient database files from Meditech

QuickClaim is suitable for single or multi-doctor offices, and there is no limit to the number of providers who can bill from one system.

## 2. GETTING STARTED

### 2.1 Creating a shortcut

On installation, QuickClaim is placed in the Program Files folder on the c:\ drive of your computer, unless you specify a different location. You can open the program through your Windows Start menu, but it will be more convenient to create a shortcut. This shortcut will place the QuickClaim icon on your Windows opening screen, or "desktop". You can then open QuickClaim simply by double clicking on the icon.

To create a shortcut, follow these steps:

- Go to the opening screen of Windows and double click on the My Computer icon.
- In the window that appears, double click on the (C:) icon.
- Now double click on the Program Files folder.

Unless you have previously changed the location of the QuickClaim's installation files, you should now see a folder in the window entitled QuickClaim. Double click on this icon.

You should now see a number of QuickClaim icons in the window. Move the mouse pointer over the icon entitled "QuickClaim" and hold the left hand mouse button down.

Now drag the icon outside the window and release the mouse button. The QuickClaim icon should remain where it has been dropped.

You can now open QuickClaim by double clicking on the icon.

## **2.2 Starting QuickClaim**

To run QuickClaim, make sure you are in the opening Windows screen. If you have created the shortcut, double click on the QuickClaim icon - the program should now open to the main QuickClaim menu.

If you have not created a shortcut, click once on the Start button on your Windows screen. Move the mouse over "Programs" and click once. A second menu should appear with "QuickClaim" somewhere inside. If you now click on "QuickClaim", the program will start.

## **2.3 Entering providers**

To use QuickClaim, your healthcare provider details - doctor's name, provider number, etc. - must be entered in the system. To do this, in the main menu, click on Manage Provider. The Providers window will appear with blank boxes for entering text. To fill in each box, click on it once, and then type the relevant information.

When you have finished, click on the Save and then the Close button. Your provider details are now stored in QuickClaim. If more than one provider will be using your system, open the Providers window again and repeat the process.

To change information about a provider who is already entered in the system, open the Providers window and click on the index tab at the top that says "Existing". This will display the names of all providers currently in the system. Select the provider whose details you wish to change by double clicking on the name. You can now make the necessary changes. When you have finished, click on the Close button.

# **3. THE QUICKCLAIM / MS-WINDOWS ENVIRONMENT**

## **3.1 How does MS-Windows Work?**

QuickClaim is designed to work in the MS-Windows environment, meaning that the main functions, such as managing patient records or claim records, are performed in their own independent spaces, or "windows". These windows vary in size and shape, and when open they occupy only a portion of your screen and can be moved around freely. You can also have more than one window open simultaneously - for example, the Patients window and the Claims window. However, only one window can be used at any given time.

## **3.2 Switching between open windows**

If more than one window is open and you want to switch to another one, click the mouse once anywhere inside the window you want to use. This will give focus to the window, allowing you to type in information and use the window's other features and commands.

### **3.3 Moving windows**

To move a window, position the mouse pointer over any part of the window near its edge and hold the left hand button down. The window will now move as you move the mouse. Releasing the mouse button will leave the window in its new location.

### **3.4 Closing windows**

Most windows in QuickClaim have a Close or Exit button - clicking on these will close the window. If no such button exists, you can close the window by clicking once on the small "X" button in the top right hand corner.

### **3.5 Using index tabs**

The Patients and Claims windows actually consist of overlapping "pages" of which only one is visible at a time. For example, the Claims window has four pages, one each for New Claim, Pending Claims, Outstanding Claims and Rejected Claims. The presence of each page is indicated by an "index tab" near the top of the window, just like real index tabs in a filing cabinet drawer.

To switch between these pages, click the mouse once over the index tab of the page you wish to view. There is no need to save what you have entered if you are moving to another page - the system's memory stores the information on all of the pages whether or not they are visible.

### **3.6 Typing information into boxes**

With QuickClaim you can enter information into a box by clicking once on it (although some boxes are for display purposes only and do not accept input). When you click, a cursor will appear inside the box, indicating that you can now begin typing; the box may also turn yellow. There is no special order for filling in boxes in a window - for example, in the Patients window you can fill in the last name before the first name. To fill in to another box, simply click once over that box.

You can also use the Tab or Enter keys to move between boxes, just as in old-fashioned DOS-based software. However, with this method you must fill in the boxes in a fixed order, starting at the top left hand.

### **3.7 Using combo boxes**

Some text boxes will display a small arrow (▼) when clicked. These are known as "combo boxes". If you click on the arrow, you will see a list of items which can be entered in that box. Double clicking on any of these items places that item in the box. If there are more items than the box has room for, you can scroll up and down the list by clicking on the up and down arrows (▼ or ▲).

## **4. MANAGING PATIENT RECORDS**

### **4.1 Adding a new patient**

To add a new patient, click on the Patients button in the main menu. This will open the Patients window (you can move the window if you don't like its position - see Section 3.3). You can now begin entering the new patient's information. The Patients window is also accessible by pressing the F4 function key.

The information can be entered in any order you like. Simply click once on any of the boxes and you will be able to type in it. (The address section actually comprises five boxes that can be selected and filled in any order you choose.)

Clicking on the Clear button will erase all the information in the boxes and allow you to start over.

When you have finished entering the patient's details, click on the Save and then Close button. This closes the Patients window and saves the information that was entered.

#### **4.2 Swiping OHIP cards**

To swipe an OHIP card, you must have a health card swiper connected to your computer (call iCard at 416-222-6485 to inquire about obtaining a competitively priced health card swiper).

To swipe a card, go to the main menu, click on the Swipe OHIP Card button, Patient, or Claim buttons. You can now swipe the OHIP card. The details stored in the card will be displayed on the screen, along with two buttons: Add Patient and Add Claim. If you click on Add Patient, you will be taken to the Patients window, where you can enter additional information on the patient such as his/her address before saving the record.

If you click on Add Claim, you will be taken to the Claims window where you can complete and enter a claim for the patient.

#### **4.3 Updating a patient's information**

To change information about an existing patient, you must first call up the patient's record. Go to the main menu and click on the Patients button. You now need to find the record for the patient in question. This can be done in several ways:

The most direct way is to type the patient's ID number in the first box and press Enter. However, if you don't know the ID number, you can type in a first or last name, then click on Look Up or press Enter. The program will display all patients having this name. Find the correct one, double click on it and the patient's details will be displayed.

You can also type in a fragment of the first or last name followed by the "\*" character, then click on the Look Up button or press the Enter key. QuickClaim will display a list of all the first/last names beginning with the letters you entered. For example, entering "Jo\*" in the First Name box might return the names "Jonathan Payne", "Josephine Kronick" and "Jorge Perez".

This list should include the patient you were seeking (if the list is too long for the window, you can scroll up and down it by clicking on the small arrows (▼ or ▲) on the right hand side of the list). Double click anywhere on the patient's name and his /her details will be displayed.

You can now make the necessary changes to the patient's record by typing over any of the text boxes. Click on the Save button when you are finished.

#### **4.4 Patient profile**

The Profile page in the Patients window lets you enter and view essential information about the patient.

To update or view a patient's profile, you must first call up the patient's record. To do this, click on the General index tab at the top of the Patients window, then enter the patient's ID number, health card number or name and click on the Look Up button or press the Enter key (see Section 4.3 for a more complete description of how to look up a patient).

You can now view the patient's profile by clicking on the Profile index tab. To enter or edit click once to the right of the heading (Allergies for example). The outline of a box will appear - you are now free to begin typing.

## 4.5 Patient history

The History page in the Patients window displays a list of all previous claims made for the patient currently selected. This page is for display only - no information can be entered here.

To view a patient's history, you must first call up his/her record. To do this, click on the General index tab at the top of the Patients window, then enter the patient's ID number, health card number or name and click on the Look Up button or press the Enter key (see Section 4.3 for a more complete description of how to look up a patient).

You can now view the patient's history by clicking on the History index tab at the top of the window.

## 4.6 Patient reminders

The Reminders page in the Patients window lets you enter global (not patient specific) events that you wish to be notified of later. To view the Reminders page, click on the appropriate tab at the top of the window.

To enter an event, click on the New Reminder button. The current date is entered by default. Next, click inside either the Once or Every radio buttons to be notified once (on the day of the event) or periodically. If you choose Every, click on the small arrow (▼) to select days, weeks, months or years, then enter the number of days/weeks/months in the box to the left. Click on the Save button when you are finished.

You will receive your reminder when you turn on QuickClaim on the specified date.

# 5. MANAGING CLAIM RECORDS

## 5.1 Adding a new claim

To add a new claim, go to the main menu and click on the Claims button. This opens the Claims window. The Claims window is also accessible by pressing the F3 function key.

First you need to specify the patient for whom you are making the claim. QuickClaim provides shortcuts to minimize the amount of typing you have to do: you can type in the patient's ID number, first name, or last name text boxes then click on Look Up or press Enter.

You may type the first or last name whole or in part then press Enter and all the first or last names beginning with the letters you entered will be displayed for you to choose from. Press Tab, Enter or use the mouse to navigate the form and fill in the other boxes. Some boxes, such as that for Service Code, will display a small arrow (▼). These are known as "combo boxes"; see Section 3.7 for detailed instructions on using these.

The Service Date combo box produces, when clicked on, a large monthly calendar. To select a date, click once within the relevant date box (e.g. March 5), then click on the Close button. If the date you need is not in the current month, clicking on the small arrows (◀ or ▶) next to the month and year will let you scroll between months/years. You may choose one or more dates per month at a time.

You may also enter a claim for a patient that is not in your patient database. In this scenario adding the new claim will also automatically add a new patient.

After you have entered all the necessary information for the claim, click on the OK button. This will save the new claim and close the Claims window. Clicking on the Close button will close the window without saving anything. If you wish to clear

the text boxes and start over, click on the Clear button. QuickClaim can be setup to memorize Service and Diagnostic Codes per patient for future billing (press the F9 function key and select the 5<sup>th</sup> box down).

Once you have entered a claim, you will be able to view it by clicking on the Pending Claims index tab near the top of the Claims window. You can also delete or edit the claim (see the following two sections).

## **5.2 Editing a claim**

If you have entered a claim that has not yet been submitted to OHIP and you wish to change some of the information in it, go to the main menu and click on the Claims button. The Claims window will open. Click once on the Pending Claims index tab at the top of the window. This will display a list of all claims not yet submitted.

To edit the claim, click once on the account number, and then click on the Edit Claim key.

## **5.3 Deleting a claim**

If you have entered a claim that has not already been submitted to OHIP and you wish to delete it, go to the main menu and click on the Claims button. The Claims window will open. Click once on the Pending Claims index tab at the top of the window. This will display a list of all claims not yet submitted.

To delete the claim, click once on the account number, and then click on the Delete Claim button. To search among many claims, try sorting the columns by double clicking on their headings.

## **5.4 Quick service codes**

If you do not wish to type in a whole 4-character service code when making a claim, or if you have trouble remembering the codes, you can create your own one-letter quick service code. For example, instead of entering "C882" for palliative care, you could create "P" as a quick service code and simply type in this letter whenever you have a palliative care claim. You can also use a single digit as a quick service code.

To create a quick service code, go to the main menu, click on the Manage Codes button, and then click on the Quick Service Codes index tab to open the Quick Service Codes window. Type the quick service code you want (e.g. "P"), then press Enter. Now type the full code ("C882"), or several codes, in the right hand column and press Enter again. Click on the Okay button at the bottom of the window if you want to save the quick service code, or on the Cancel button if you don't want to save it. For additional types of Quick Codes explore the remaining index tabs in the Manage Codes window.

## **5.5 Quick function keys**

The Function keys are the top row of keys on your keyboard. These will allow you to navigate quickly in QuickClaim, see the legend below:

F1 – Help

F3 – Claims

F4 – Patients

F5 – Appointments

F7 – Patient History

F9 – Options

F10 - System Functions

F11 - QuickClaim Sync

F12 - Re-login (passwords)

Ctrl + F10 - Open QuickClaim Folder

Shift + F11 - QuickClaim inHand Connection (Palm Functionality)

Shift + Ctrl + F10 – QuickClaim’s database viewer

Shift + Ctrl + Alt + C + R – to create a demo database / remove a database (**Warning:** for training / trial purposes only, DO NOT USE IN CONJUNCTION with a “real-life” database).

## **6. SENDING AND RECEIVING DISKETTES**

### **6.1 Sending diskettes**

When you are ready to send claims to OHIP, go to the main menu, click on the Submit Claim button in the Tools column. The Submit Claims window will appear. If more than one provider is using your system, you must select the appropriate provider by clicking once inside the Submit Claims For combo box and then on the small arrow (▼). Then select the provider by clicking on his/her name (see Section 3.7 for information on using combo boxes).

For Submit Method, "3.5" Disk(s)" is already entered by default. If you are billing by EDT, click on the small arrow on the right hand side of the Submit Method, box, and then click once on "EDT".

Insert a diskette into your floppy disk drive, and then click on the Start button. QuickClaim will write the claims onto the diskette. When it finishes, your diskette will be ready for submission.

### **6.2 Receiving diskettes**

To read a diskette you have received from OHIP, go to the main menu and click on the Reconcile button in the Tools column. Ensure that the Reconcile from combo box displays 3.5" disk(s) and choose the print options you require. Insert the diskette into your computer, and then click on the Start button.

After a few seconds your reconciliation information will be displayed on your monitor. The information is actually contained on four pages, each with an index tab at the top. To read each page, simply click on the appropriate tab. After reconciling you will notice that the reconciled claims moved from the outstanding claims window and into either their respective Patient histories or the Rejected Claims window for resubmission.

### **6.3 Resubmitting a claim**

If you wish to resubmit a claim that was earlier rejected, go to the main menu and click on the Claims button. This will open up the Claims window. Click once on the Rejected Claims index tab near the top of the window. You will see a list of all claims previously submitted but not accepted by OHIP. To resubmit any of these claims, select the account number by clicking once on it, then click on the Re-submit Claim button. This moves the claim to your New Claim window for resubmission. If you click the Close Account button, the claim will be removed from the Rejected Claims list and it will be saved in the Patient's history. Clicking the Claim Details button will allow you to mark the claim as paid prior to closing the account.

## 7. ELECTRONIC DATA TRANSFER (EDT)

QuickClaim is equipped to perform electronic data transfer (EDT) without the need for additional software or reliance on Window's HyperTerminal. However, you must have a Hayes compatible hardware modem, (we highly recommend Internal 3COM / USRobotics 56K or USRobotics 56K External USB model number 5633 modems) and an EDT account with the Ontario Ministry of Health and Long Term Care. You will find an application form on the QuickClaim installation CD.

HYPE! Systems Inc. will guide you through the process of obtaining these accounts - call Technical Support at: 1-800-592-2138 ext. 82.

## 8. THE APPOINTMENT BOOK

### 8.1 Changing the size of time slots

The appointment book is preset to 30-minute time slots. However, 10, 15, 20 and 60 minute time slots are also available. Open the appointment book from the main menu by pressing the F5 function key or by clicking on the Appointments button. Right clicking the vertical time band on the left will allow you to edit *the appointment book time slots*. Clicking on the Setup button and the Time Slots index tab will display, and allow you to choose, a default appointment length that is independent of *the appointment book time slots*. Single and multi-doctor views are available by clicking on the Doctors button.

Clicking repeatedly in the grey area next to the appointment window's four buttons (Doctors, Setup, Print, and Close) you will be able to select between the two appointment book views.

### 8.2 Booking an appointment

To book an appointment, go to the main menu and click on the Appointments button. The Appointments window will appear with the current day selected by default.

If the appointment you are booking is for a future date select another day or month with the small arrows (◀ or ▶) at either side of the month's name. To select a particular day of a month, click on it once - a dark brown fill box will appear over it, indicating that it has been selected. When you have the desired date, enter or view existing appointments.

To create the appointment, click on an appointment slot and enter either the Patient I.D. or Last/First name whole or in part and press Enter. Additional appointment details may be entered by right clicking on the occupied appointment and choosing Appointment Details. Appointment(s) are automatically saved upon entry. You may bill, view patient's demographic and billing history, and even create automatic billings through the appointment book.

### 8.3 Changing a patient's appointment time and double, triple... booking

If you have already entered an appointment and wish to move it to another time slot, simply click on the appointment's left edge, hold the mouse button down, and move the mouse pointer to the new time slot or over an existing appointment to double, triple... book. When you release the mouse button, the patient's name will remain in the new time slot. You can also change an appointment time manually in Appointment Details (above paragraph).

## 8.4 Deleting an appointment

To delete an appointment right click it and select Delete, or simply click the occupied appointment slot and press the Delete key on your keyboard.

## 9. PRINTING / VIEWING INFORMATION

QuickClaim has a variety full page printouts and reports, and label print options that are intuitively available from the Claims, Patients and Appointments windows and index tabs. You can also print and view past claims, appointments and monthly totals reports from the Print column. Clicking the Print or Print setup button the bottom of the Print column allows you to customize the columns of the Remittance Advice Report from the Select Report combo box (top of window). The Print Style combo box allows you to change the printed font and the Printer Setup button allows the user to toggle between portrait and landscape paper print orientations (we recommend 8pt. font / landscape for detailed printouts).

You can obtain detailed printouts for research and accounting purposes from QuickClaim's database by pressing with a little knowledge of SQL and QuickClaim's tables viewer by pressing Shift/Alt/F10 simultaneously.

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