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**Quick Start Guide**

## **Congratulations on your purchase of Helper Software!**

As a Helper Software user, you will join thousands of behavioral health providers, medical doctors, office administrators, and billing procedure providers who rely on Helper Software to keep their businesses running efficiently.

The Quick Start Guide is designed to help you install, set up, and begin using Helper Software quickly and easily. Within a couple of hours, you should be up and running and able to generate billing with the software.

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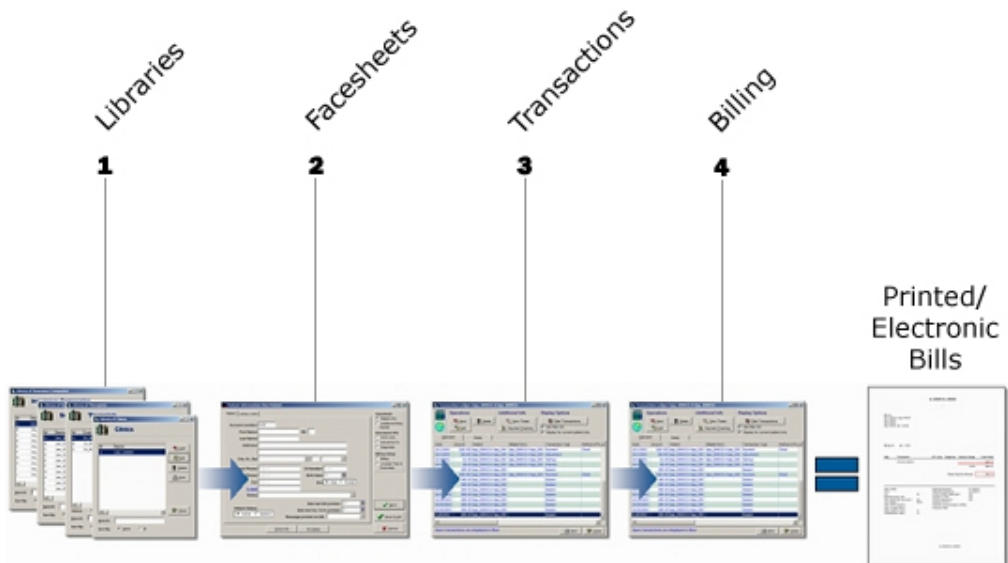
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# GETTING STARTED

## Introduction

Helper Software gathers a great deal of information about your practice into its databases and then leverages that information each time you use it. In the end, you save countless hours of repetitive data entry, and you have an end-to-end solution that takes you from patient information to printed and/or electronic bills.

To accomplish this ease of use, expect to devote a couple of hours working through this document while you set up the application. The Helper Software setup process is divided into four areas: Libraries, Facesheets, Transactions, and Billing.





Since each area of Helper Software is built on the previous, it is imperative that you work through each area in order. To help you stay on track, the main body of this document is divided into these four areas and marked with right margin tabs for easy reference.

## How to Use This Guide


We strongly encourage you set aside a few hours to sit down in front of your computer with the Helper Software running and familiarize yourself with the software as you read this guide. (If you need help installing the software, see the detailed instructions in *Appendix A*.)

To help keep you on track, we have used a number of conventions throughout the Quick Start Guide:


<b>Bolded Words</b>	Typically, a word that is capitalized and <b>bolded</b> is a command you act on; it could be a button (e.g., click the <b>Options</b> button), or a keyboard command (e.g., press <b>F1</b> for Help).
 <div style="border: 1px solid black; padding: 2px; display: inline-block;"><b>TECH TIP</b></div>	Tech Tips are designed to help you avoid common pitfalls or take advantage of special features. They appear in boxes accompanied by an information icon.
 <div style="border: 1px solid gray; padding: 2px; display: inline-block;"><b>Important</b></div>	Important comments and suggestions appear in gray boxes accompanied by an exclamation point icon. Often these comments are critical in nature; please take note of them.
Pipe symbol (   ) used in menu and screen sequence commands	When we instruct you through a sequence of actions involving menus, we use the pipe symbol (   ) as a shortcut (for example, "Select <b>Libraries   Facilities</b> "). This simply means that you click the <b>Libraries</b> from the main menu and then click on the <b>Facilities</b> library to open it.
Mousing	We use standard "mousing" conventions: "click" means to left-click on something (e.g., click <b>Payer</b> ); "drag and drop" means to left-click on an item, and—while holding down the left button—drag the item to somewhere else and then release the left button; and so forth.

We encourage you to visit us on the web at [www.helper.com](http://www.helper.com). On our web site, you will find technical advisories, technical tips, and more.

## How Helper Software Works

Helper Software stores your information in its 'Libraries'. The Library screens display an image of a small collection of books  for easy identification.

In more technical terms, a library is a database. A database allows you to enter information once and then use that information to perform multiple functions. For example, once you enter the information about a provider, the insurance companies they bill to, and the patients they see, you can easily generate an encounter and create a 1500 claim by entering only the date of the encounter.

Each time you access a library from a non-library screen, you will click an ellipsis button  to open the corresponding library. For example, when you add a patient facesheet you need to link the patient to a provider. To do so, you click the ellipsis in the provider/therapist field and select the patient's provider from the Provider/Therapists library.

Because Helper Software is a database program, you must enter data before you can use it. This guide focuses on getting you started entering data.



**TECH TIP** Helper Software uses information that you enter to create bills, HCFA forms, and reports. Until you enter your information, Helper Software is unable to perform any of these tasks.

## Safeguarding and Caring for Your Data

An investment in Helper Software is an investment in your business. The more you use Helper Software, the more vital information it will contain about your practice, your patients, and your finances. Therefore, it is extremely important that you protect your data by regularly backing up your Helper Software data. Each time you exit the application, you will be prompted to back up your data. If you need instructions on how to perform a backup, see *Appendix B* of this document.



**TECH TIP** When backing up your data, two locations are better than one. We strongly recommend that you back up your data to your computer's hard drive on a daily basis and to a CD-ROM, flash drive, or other removable media on a weekly basis.

In addition to backing up your Helper Software data, you should also use the built-in Integrity Check utility. Integrity Check performs minor housekeeping operations on your Helper Software database, cleaning it up and making it run more efficiently. You should run the Integrity Check either weekly or monthly. *Appendix C* contains detailed instructions on using Helper Software Integrity Check.

# LIBRARIES

**Libraries** are the foundation of Helper Software—they contain information that will be used repeatedly throughout the program. Therefore, it is imperative that you set up Helper Software’s libraries correctly before you start using the program.

Each Helper Software Library comes pre-loaded with a sample entry. When making your first entry in any library, you should not delete the sample entry or add a new one. Instead, edit the existing sample entry and replace the information with your own data.

Use the **Edit** button to alter the sample for the first entry.



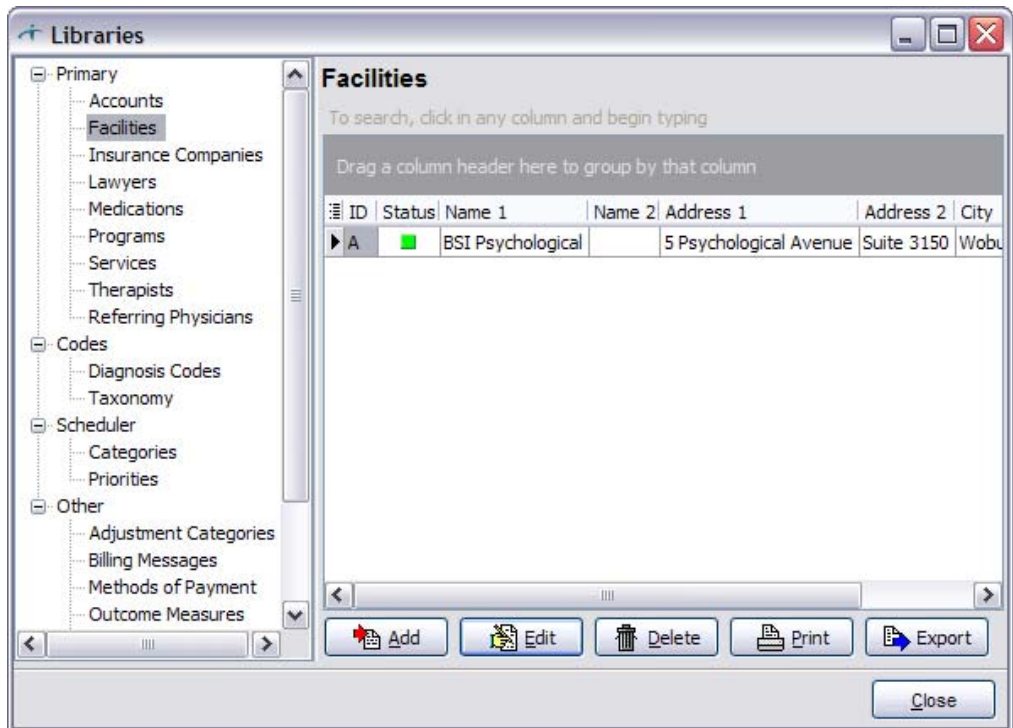
Once you have replaced the information in the sample library entry, you can begin adding new entries as necessary. Helper Software saves the information you enter into its libraries, so you only need to enter it once and can reference it again and again.



**Important:** You should **never delete** an entry from any library, even if the entry is no longer in use. Either edit existing entries to update the information they contain or archive the existing entry by marking it as inactive.

## Facilities Library

The Facilities Library holds information about your practice or facility such as the facility's name, address, and telephone numbers.

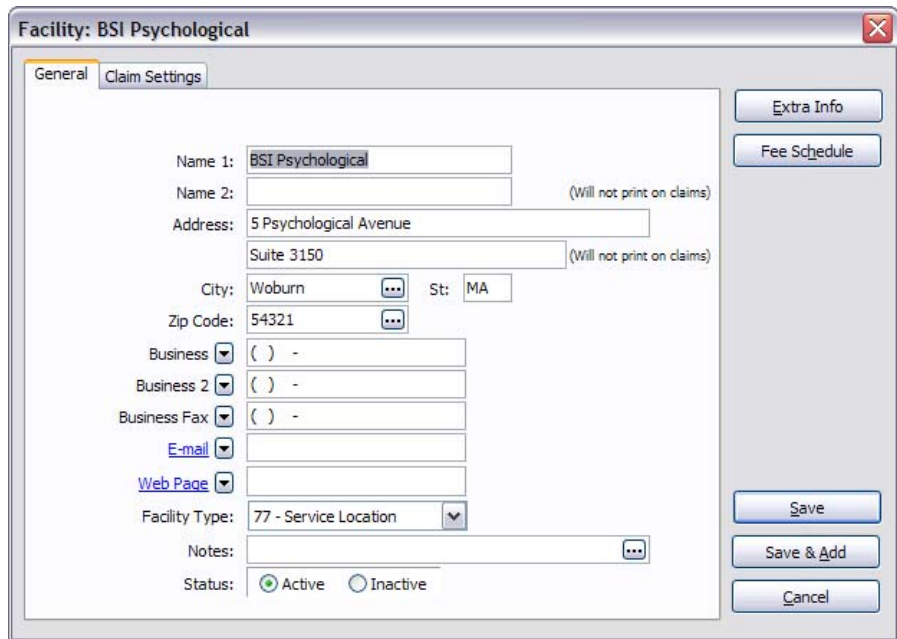


Helper Software uses the information contained in this library to relate each of your patients to a particular facility.

### *To set up the Facilities Library*

- 1** From the menu, select **Setup | Libraries** and then select **Facilities** in the **Primary** folder. The sample facility appears highlighted.
- 2** Click **Edit** to edit the highlighted facility or clinic (or **Add** if this is not the first time you have entered a facility or clinic).

The Facility Information window appears.



Facility: BSI Psychological

General Claim Settings

Name 1: BSI Psychological

Name 2: (Will not print on claims)

Address: 5 Psychological Avenue  
Suite 3150 (Will not print on claims)

City: Woburn St: MA

Zip Code: 54321

Business ( ) -

Business 2 ( ) -

Business Fax ( ) -

E-mail

Web Page

Facility Type: 77 - Service Location

Notes: ...

Status:  Active  Inactive

Extra Info

Fee Schedule

Save

Save & Add

Cancel

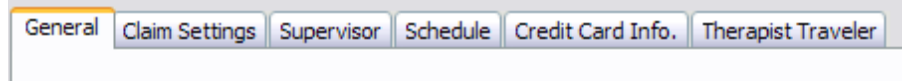
- 3 In the **Facility Name** field, enter the name of your facility, clinic, or practice.
- 4 Fill in information about your practice in each of the fields until you reach the bottom of the screen. If any of the fields do not apply to your practice, just leave them blank.
- 5 When you are done, click **Save** and then **Close**.

## Therapist Library

The Therapist Library contains information on each provider or therapist in the practice including their contact information, ID numbers, credit card merchant numbers, and electronic claims identifiers.

Each patient is linked to a therapist in the facesheet, on the Library Links screen. The therapist name selected on that screen can print on bills and at the bottom of the 1500 Claim form (boxes 25 and 33). The therapist is also used for sorting summary reports, in provider pay reports, and for exporting electronic claim data.

The Therapist Library is composed of 6 sections—each with its own tab across the top of the window:



Use these tabs to access each section of the Therapist Library.

### *To set up the Library of Therapists*

- 1** From the menu, select **Setup | Libraries** and then click **Therapists** in the **Primary** folder. The sample therapist appears highlighted.
- 2** Click **Edit** to edit the highlighted therapist (or **Add** if this is not the first entry) and then fill in all applicable fields.

**Note:** At a minimum, you must enter all applicable information under the **General** and **Schedule** tabs. If you are submitting insurance claims, you will need to complete the **Claim Settings** tab. You do not need to save information that you have entered on a tab, or section, before moving to the next tab. All the information that you have entered will be saved when you click **Save** to exit the screen.

- 3** When you are done, click **Save** and then **Close**.

## **Services Library**

The Services Library stores the services for your practice and the associated service codes. Here you can assign units, fees, and other defaults for each service. It is important to fill out this information completely and accurately. Helper Software uses the information entered in the Services Library every time you create an Encounter/Session.

### *To set up the Services Library*

- 1** From the menu, select **Setup | Libraries** and then click **Services** in the **Primary** folder.
- 2** Four services are already included as examples. Highlight one of these examples and click **Edit**. Edit the sample services to match the procedure you provide. Click **Add** to enter additional services.



**Important!** Never delete the sample entries. Instead, edit the samples to match your services.

- 3 Enter the **CPT Code** from the Library of CPT codes, followed by a CPT Code Modifier, if necessary.
- 4 Change the service **Name** to a service that your practice provides.
- 5 Change the **Length** of time to suit the needs of your practice.
- 6 Enter the **Fee** that you will charge patients for the service.
- 7 Choose a **Place of Service** from the Places of Service Library by clicking the **ellipsis** button to the field's right. "11, Office (IC)" is the recommended entry.
- 8 Enter a **Type of Service** code. "09 – Other Medical" is recommended.
- 9 Enter **Days/Units** of procedure in single-digit or four-digit format. For one unit, enter either "1" or "0010".
- 10 Complete the **Family Plan**, **EMG**, and **COB Code** information, if necessary.
- 11 Set the Managed Care **Units/Visits** ratio at 1/1, or the appropriate value for your practice. This ratio determines how many units will be deducted from Managed Care Authorizations for each Encounter that this procedure/service is provided.
- 12 Click **Save** to return to the Services screen or click **Add** to enter any services you provide in addition to the samples then repeat the steps above.



**TECH TIP** If your practice renders a single service for multiple lengths of time, fees, or CPT codes, you should enter the procedure multiple times in the Services Library with the appropriate service name and differentiate by the characteristics that vary.

## Insurance Companies Library

Helper Software's Library of Insurance Companies holds information about the insurance companies to which you submit claims. The information contained in this library is used to relate each of your patients to an insurance company.

## *To set up the Library of Insurance Companies*

- 1** From the menu, select **Setup | Libraries** and then click **Insurance Companies** in the **Primary** folder. A default Insurance Company is used as the sample entry.
- 2** Highlight the name of the sample insurance company and click **Edit** (or click **Add** to add a new insurance company).
- 3** The Insurance Information window contains four tabs: Contact, Billing, Claim Settings, and the Provider Claim Settings tab. Fill out each field on these tabs as necessary.
- 4** On the **Billing** tab, from the **Billing** drop-down list, select the default billing method for this company. This information will be used to automatically fill out information for patients covered by this insurer. Make sure you populate the Source of Payment and Claim Filing Indicator if you are submitting claims. Select the check box below this field if you want to hold the claim until the Primary insurance has paid when this insurance company is set as the patient's Secondary insurance.
- 5** If you added any numbers through the Library of Providers for this insurance company, those will appear on the **Therapist Claim Settings** tab since the two libraries work in conjunction— defaults set for one library are also set for the other libraries.
- 6** On the **Claims Options** tab, you can select the secondary identifiers required for the ANSI 837, the 1500 Claim form (08/05), and the older 1500 Claim form (12/90).
- 7** Click **Save** to exit the screen. You will return to the Library of Insurance companies.
- 8** Repeat these steps for each insurance company.

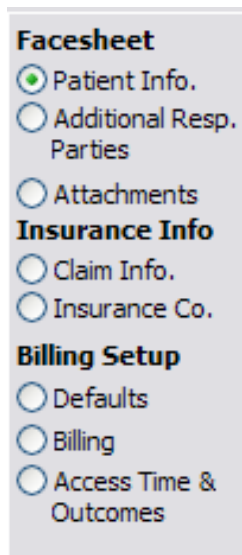
## **Other Libraries**

The Facility, Therapists, Services, and Insurance Companies Libraries that you have begun to build are the most important for getting started. However, Helper Software contains almost two dozen libraries, including Referring Sources, Medications, Programs, Accounts, and Lawyers. You may wish to set up some of the other Libraries at this time. For instance, if you prescribe medications, you may want to create a Library of Medications.

# PATIENT FACESHEETS

Helper Software stores information about patients in a *Facesheet*. Because the Facesheet screens rely on the information contained in Helper Software's Libraries, you should not create a Facesheet until you have completed setting up your libraries. Once you have created a Facesheet for a patient, his or her name will appear in the Patient List on Helper Software's Main Screen.

On the right-hand side of the Facesheet, you will notice a panel, called the Facesheet Navigation Bar, with three sections: *Facesheet*, *Insurance Info*, and *Billing Setup*. Each of these sections contains two or three screens.



Click the buttons that appear within the Facesheet Navigation Bar to jump to the corresponding screen within the Facesheet.



**TECH TIP** It is not necessary to save your information when you jump to different sections within a Facesheet. All of the information that you enter in the Facesheet's different sections will be saved when you click **Save** to exit the Facesheet.

## Patient Information

The patient information screen contains basic patient information. Both tabs of the patient information screen must be completed: **Patient** and **Library Links**.

*To enter patient Information*

The patient tab of the Patient Information screen contains basic demographic information such as name, address, phone number, and social security number.

- 1 Click the **Patient Info.** button in the Facesheet Navigation Bar and fill out all applicable fields.

**Note:** You do not need to enter anything in the **Date Last Bill** or **Date Last Ins. form printed** fields. Helper Software will update these fields automatically when you begin to print bills or insurance claims.

- 2 Once you have completed filling out the **Patient** tab, click the **Library Links** tab at the top of the screen.



**TECH TIP** The Patient Status field is at the bottom-left of the Patient screen. Patients marked Inactive in the **Patient Status** field will be hidden from the active Patient List on Helper Software's main screen. Remember, you should *never delete* information, including patients, from Helper Software's database; either edit the patient Facesheet or make it inactive.

### *To enter library links*

The Library Links screen contains other essential patient information such as primary clinic, primary provider, and referring source. You will notice that you cannot enter any information on this screen directly by typing. As you begin typing in each field, Helper Software will automatically fill in the rest of the entry with information from the corresponding Library. You can also use the ellipsis buttons in each field as a shortcut. The Library Links tab relates each patient to information that you entered in your Libraries.

- 1 Select a **Primary Facility** from the Library of Facilities by clicking the **ellipsis** button to the field's right.
- 2 Select a **Primary Therapist** from the Library of Therapists.



**TECH TIP** The Primary Facility and Primary Therapist fields are the only required Library Links for Facesheets. If necessary, make additional library selections.

## **Additional Responsible Parties**

The Additional Responsible Parties section of the Facesheet stores information about billable parties other than the patient and the patient's insurance companies

that will be responsible for paying a portion of the patient's charges. Parents, spouses, insured parties, or other third parties should be entered as “Additional Responsible Parties.” You may enter up to two additional responsible parties.

### *To add additional responsible parties information*

- 1 Click the **Additional Responsible Parties** button in the Facesheet Navigation Bar.
- 2 Fill in all information on any Additional Responsible Parties in the **Responsible Party #1** section.
- 3 To enter information for a second responsible party, click the **Responsible Party #2** tab and fill in the information for a second responsible party.



**TECH TIP** *Never delete* an additional responsible party from a Facesheet once it has been entered; edit the information or adjust the billing allocations so that they are no longer responsible for charges.

## Claim Information

The Claim Information section of the Facesheet stores information used to print 1500 Claim forms or to generate electronic claims for patients with insurance. Every field is numbered to match the boxes on the form.

### *To add Claim information*

- 1 Click the **Claim Info** button in the Facesheet Navigation Bar.
- 2 At a minimum, you should fill in fields **8** and **12**.

## Insurance Company

The Insurance Info. section of the Facesheet contains information about the patient's insurance company. This screen can also be used to store information about the insured party under whom the patient is covered. The information contained in this section links a patient to the insurance company stored in Helper Software's Library of Insurance Companies.

### *To add insurance company information*

- 1 Click the **Insurance Co.** button in the Facesheet Navigation Bar.

- 2 Fill out each field for the primary insurance company.
- 3 To enter information for a second insurance company, click the **Secondary Insurance Co.** tab and fill in the information for a second insurance company.



**Important:** *Never* delete information, such as an insurance company, from Helper Software's database. Because insurance company information for a patient may change, Helper Software includes an archiving feature. If you ever need to change a patient's insurance information, use the **archive insurance company** button, located at the bottom of the insurance company information screen. On the archive insurance policies screen, highlight the desired company, and click the **inactive** button to archive the company. You will now be able to enter a new primary or secondary insurance company.

## Defaults

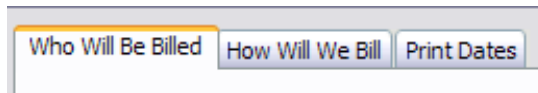
The Defaults section of the Facesheet contains up to five diagnosis codes from either the DSM-IV or ICD Libraries. The information contained in this Library is used to relate a patient to diagnoses from Helper Software's Diagnosis Libraries. Please note that only the first four diagnoses entered in this screen will appear on 1500 Claim forms.

- 1 Click the **Defaults** button in the Facesheet Navigation Bar.
- 2 Click the **Diagnosis Code** ellipsis button to select a diagnosis code.
- 3 Select up to five Diagnosis Codes.
- 4 If you are enrolled in ERA (Electronic Remittance Advice) through ClaimsConnect then you can set the defaults on the **ERA** tab for how you want to handle procedure billing changes posted when processing an ERA.

## Billing

Billing is the most important section of the Facesheet; it must be filled out completely and accurately. Billing is where you specify the information that Helper Software will use to create Encounters, allocate your charges among billable parties, and select a method of billing for both patient and insurance companies.

The Billing Information screen has three sections:



Use these tabs to access each Billing section of the Patient Facesheet.

### *To add the who will be billed (billing allocations) information*

Use the Who Will Be Billed screen to allocate charges among each billable party for the patient. In this section, you tell Helper Software the amount of payment that you expect to receive from each billable party.

This section contains two separate columns: **Method 1** and **Method 2**.

- Use **Method 1** for patients who do not have a fixed copay amount.
- Use **Method 2** for patients who have a fixed copay amount.



**IMPORTANT:** You can use only one method—not both.

#### Method 1

- 1 At the top of the Billing section of the Facesheet, click the **Who Will Be Billed** tab.
- 2 If the patient has a primary insurance company, enter either a dollar value per Encounter or a percentage amount of each Encounter in the **Amount expected from primary ins. co.** section.
- 3 If the patient has a secondary insurance company, enter either a dollar value per Encounter or a percentage amount of each Encounter in the **Amount expected from secondary ins. co.** section.
- 4 In the **Divide the remaining balance among** section, divide the remaining balance, by percentage, between the patient and Additional Responsible Parties.

#### Method 2

- 1 At the top of the Billing section of the Facesheet, click the **Who Will Be Billed** tab.
- 2 In the **Charge the copayers a fixed amount** field, enter the copay amount.
- 3 In the **Divide the copay amount among** fields, allocate the copay between the patient and Additional Responsible Parties.

- 4 Helper Software will automatically charge the remaining amount to the patient's insurance companies.



**TECH TIP** Helper Software will always charge the full amount of the Encounter on insurance claims, regardless of the expected allocations you set. Additionally, Helper Software will always charge 100% of the remaining balance to the patient if no other selections are made.

### *To add the how we will bill (billing methods) information*

Use the How We Will Bill screen to choose a default billing method for each billable party.

- 1 At the top of the Billing Information section of the Facesheet, click the **How Will We Bill** tab.
- 2 Click the drop-down arrows to choose a billing method for the **Patient**, **Additional Responsible Parties**, and **Insurance Companies** that will be billed for this patient's Encounters.

### *To add access times and outcome measures information*

Use the Access Times and Outcome Measures section of the Facesheet if you will use Helper Software's reporting capabilities to analyze the outcome performance of your practice. For example, you might want to investigate how many Encounters you typically see your patients for under a particular CPT code.

Use the Access Time tab to collect time information on this screen, and then run the Outcomes report to analyze access time for your practice.

Use the Outcome Measures tab to create a list of outcome tests and enter patient test scores on this screen, and then run the Outcomes report to analyze the test scores for your practice.

# TRANSACTIONS

Helper Software stores information about each Encounter, Payment, and Adjustment as a *Transaction*, in the same way patient information is stored in a Facesheet. Transactions are used to credit or debit the account balances of the billable parties associated with a patient.

Transactions use the information entered in Libraries and Facesheets, so these sections must be set up before you can start entering Transactions. Likewise, bills, claim forms, and reports draw heavily on the information entered in Transactions, so these features cannot be used until Transactions have been entered.

## Accounting with Helper Software

Helper Software maintains separate accounts for each billable party associated with a patient. A patient can have up to five billable parties:

- **1**—The patient
- **2 & 3**—The primary and secondary insurance company
- **4 & 5**—Two additional responsible parties

Because transactions are linked to individual billable parties, it is very important to enter transactions accurately. Charges must be allocated among billable parties correctly. Payments and adjustments must be applied to the account of the correct billable party.

Helper Software performs two different types of accounting: Payment Tracking and Balance Forward. *We recommend using Payment Tracking.*

- Payment Tracking accounting applies specific payments to specific Encounter charges.
- Balance Forward accounting adds the sum of all outstanding charges, or debits, against all outstanding credits.

## Setting Up Payment Tracking

Payment Tracking is a feature of Helper Software that can be switched on and off, depending on how you want to perform your accounting. Because we strongly recommend using this feature, Payment Tracking is automatically switched “on” when you install Helper Software.

### *To activate or deactivate payment tracking*

- 1 Select the **Setup** menu and then select **Preferences**.
- 2 To activate Payment Tracking select the check box next to **Payment Tracking** so that a check mark appears.
- 3 To deactivate Payment Tracking select the check box next to **Payment Tracking** to remove the check mark.
- 4 Click **Save**.



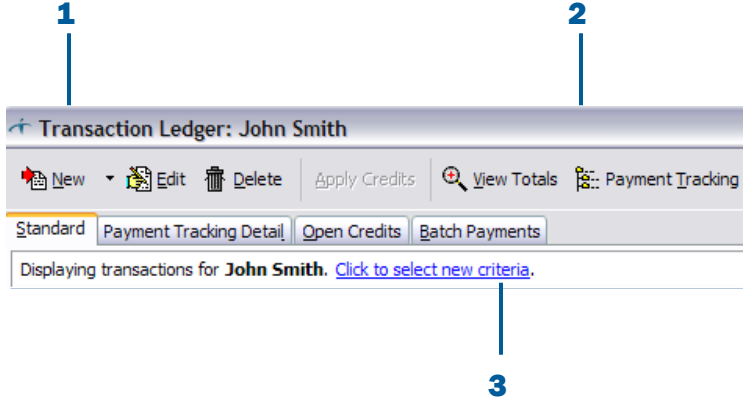
**TECH TIP** Helper Software uses Payment Tracking information to perform accounting. Therefore, if you are going to use Helper Software’s payment tracking features, you must have Payment Tracking activated when you begin recording payments. Rectifying payments and Encounters can be very difficult if you activate Payment Tracking after you have begun to enter payments.

## How the Transaction Ledger is Arranged

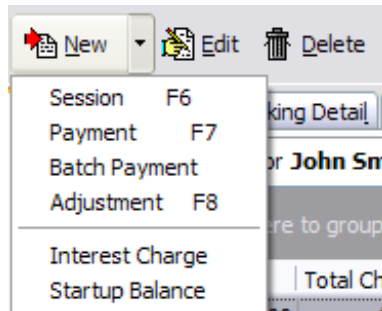
Helper Software’s Transaction Ledger is a powerful tool to manage the financial activity of your practice. You can work with Transactions for all of your patients at once, or with Transactions for one patient at a time. You can even limit the date range of Transactions that you wish to work with.

To open the Transaction Ledger click the **Transactions** button at the top of Helper Software’s main screen.

The upper section of the Transaction Ledger screen consists of three sections:



- **1) Operations**—enables you to add, edit, delete, and apply credit transactions. When you click **New** a number of options appear:



- **2) Additional Info**—allows you to view account balances and re-apply transactions.
- **3) Display Options**—provides you with a variety of filtering options for the Transaction Ledger.

The main portion of the Transaction Ledger is composed of four tabs:



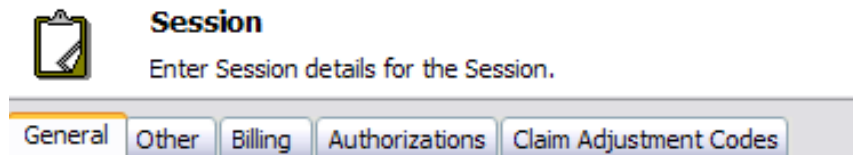
- **Standard**—displays transactions.
- **Payment Tracking Detail**—displays transactions and payment tracking information.
- **Open Credits**—displays open credit information.
- **Batch Payments**—displays open batch payment information.

## Sessions

To charge for the services you provide, you must first create a record of the session. Helper Software will distribute your charges for each session among the patient's billable parties based on the information that you entered in the **Who Will Be Billed** section of the patient Facesheet.

### *To enter a session*

- 1 Click the **Add Sessions** button on Helper's main screen. Notice that the Session screen has five tabs:



- 2 On the **General** tab screen, you should only need to enter the **Service Facility Location** (Box 32 on the 1500 Claim form) and information for the **Dates of Service** and **Time** fields. The remaining information in this section will be drawn from the patient's Facesheet. In the **Status** field, select **Kept and charged for**. In the **Rendering** and **Billing Provider** fields, verify that the correct provider is selected. If submitting claims, make sure that the correct **Taxonomy** code is entered for the **Rendering Provider**.
- 3 On the **Billing** tab screen, verify that the **Total Charge**, **Writeoff**, and **Total Billed** fields are correct.
- 4 The **Claims Adjustment Codes** tab screen allows you to add, view, or delete a claim adjustment code attached to a specific payment. The codes are required if you are submitting secondary claims electronically to the payer.

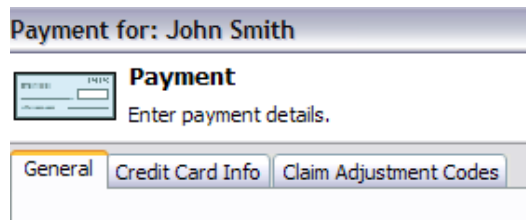
Click **Save** to save and exit the encounter.

## Payments

Use Payment Transactions to record payments that you receive from billable parties.

### *To enter a payment*

- 1 Click the **Transactions** button on Helper's main screen.
- 2 Click the **New** button in the **Operations** section and then select **Payment**. Notice that the Payment screen has three tabs:



- 3 Enter a **Date**, **Amount**, **Method of Payment**, and **Check Number** (if needed).
- 4 Enter the appropriate billable party in the **Payment From** field. The billable party entered in this field will be credited.
- 5 Verify that the correct **Therapist** is entered. This information is drawn from the Facesheet.
- 6 Click **Save** to save the payment exit the screen. If Payment Tracking is activated, the Payment Tracking screen will automatically appear when a Payment is saved.

## Payment Tracking

The Payment Tracking screen allows you to apply payments you have entered to a specific encounter or encounters.

### *To use the payment tracking screen*

- 1 In the Transaction Ledger click the **Payment Tracking** button in the Additional Info. Section. The upper section of the Payment Tracking screen

shows who has made the current payment, the date of the payment, and the payment's total amount.

- 2** The ledger rows display all the patient's Transactions that have not been paid in full.
  - Only the right-most ledger column—**Amount to Apply**—can be edited.
- 3** Click **Save** to save you work and exit the screen.



**TECH TIP** You can turn off the Automatically Distribute Payment Tracking feature in Helper Software's General Preferences and you will be forced to enter an amount next to the desired encounter(s).

## Adjustments

Adjustment Transactions are entered any time you need to credit or debit a billable party's account. The Adjustment screen is very similar to the Payment screen.

### *To enter an adjustment*

- 1** Click the **New** button in the **Operations** section and select **Adjustment**. Notice that the Adjustment screen has two tabs: **General** and **Credit Card Info**.
- 2** Enter a **Date** and the **Amount** of the adjustment.
- 3** Enter the billable party that the adjustment will be applied to in the **Adjustment To** field.
- 4** Verify that the correct **Provider** is entered.
- 5** Click **Save** to save the adjustment exit the screen.



**TECH TIP** Positive Adjustments add to the billable party's balance, similar to encounter charges. Negative Adjustments subtract from the billable party's balance, similar to payments.

## Startup Balance

Startup Balance is a special type of adjustment Transaction. Use the Startup Balance feature for established patients with an existing balance. This feature allows you to enter patient information into Helper Software and set a Startup Balance without having to enter past Encounters and payments to recreate a

financial trail. Later, you will be able to apply payments towards the Startup Balance.

### *To enter a startup balance*

- 1** Click the **New** button in the **Operations** section and then select **Startup Balance**.
- 2** Enter the amount of the startup balance in the **Amount** field.
- 3** Click **Save** to save the startup balance and exit the screen.



**TECH TIP** If a patient's account has multiple billable parties, such as insurance companies or Additional Responsible Parties, you must divide the total account balance between each billable party and enter a separate Start-up Balance for each billable party.

# BILLING

After setting up libraries, creating Facesheets for your patients, and entering Transactions, you are ready to use all of this data to print bills, 1500 Claim forms, reports, and even electronically submit claims to insurance companies.

Whether you are a practitioner, an office administrator, or a billing specialist, billing is one of the most important things your business does. This section will show you how to use Helper Software to bill patients, responsible parties, and insurance companies accurately and dependably.

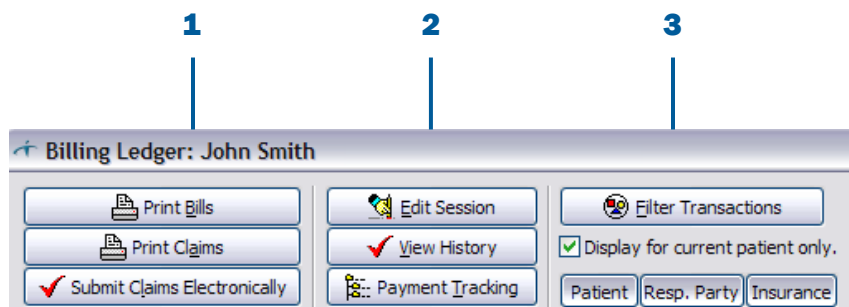
## Billing Ledger

Helper Software's **Billing Ledger** is a powerful tool to manage patient and insurance billing. You can use the Billing Ledger to bill, print HCFAs, or electronically submit claims. You can keep track of charges that have already been billed or paid, and you can even re-bill.

To open the Billing Ledger, click the **Billing** button at the top of Helper Software's main screen.

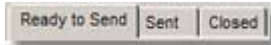
### *How the billing ledger is arranged*

The upper section of the Billing Ledger screen consists of three sections:



- **1) Billing**—to print bills, 1500 Claim forms, or submit claims electronically.
- **2) Additional Info**—to edit Encounters, view billing history, and re-apply previously applied payments.
- **3) Display Options**—to customize the layout of the Billing Ledger.

The lower section of the Billing Ledger is composed of three tabs:



- **Ready To Send**—displays charges that have not been billed.
- **Sent**—displays charges that have been billed but are not paid.
- **Closed**—displays charges that are billed and paid.

If you have already entered encounters for your patients, you should see the charges listed in the Billing Ledger.



**Important:** Do not be alarmed if you see an encounter listed multiple times! Helper Software bills each responsible party separately—if there are multiple responsible parties (such as the patient and a primary insurance company) Helper Software generates a bill for each one.

Every line in the ledger represents a charge that will be billed to a responsible party. The **Billable Party** column indicates which charge is for which billable party.

## Printing Bills

Helper Software allows you to print patient walk-out bills directly from the Patient List. Click the **Print** button, located at the lower right-hand side of the patient list and a Print Preview screen appears. Click the **Print** button to send the report to the printer.

However, for insurance billing, you'll want to print bills in batches rather than one-by-one.

### *To print patient or additional responsible party bills*

- 1 In the Billing section at the top of the Billing Ledger, click the **Print Bills** button. The Reports screen displays.
- 2 On the report listing on the left-hand side of the screen, highlight the billing method that matches the billing method you selected in the patient's Facesheet on the **How We Will Bill** section of the Billing section.
- 3 Click the **Run** button. The Bills screen displays.
- 4 In the Bills screen:
  - Choose a date range using the **Select Transactions** function.



When selecting a date range in Helper Software, always choose an ending-on date that is after the last date of procedure you wish to include. For instance, to set a date range for today, use today's date as the starting-on date and tomorrow's date as the ending-on date.

- Use the **Select Current Patient** button to run bills for the current patient.
- Use the **Select groups of patients** button to run bills for a specific group of patients.
- Use the **Select groups of Transactions** button to select a group of Transactions.
- Use the **Report Layout** button to edit the bill's layout.

**5** Click on **Print** or **Preview** to create a bill or batch of bills.



**TECH TIP** By default, Helper Software will always print a batch of bills for all of the charges that appear in the Ready To Send section of the Billing Ledger. To print a bill for only one patient, use the **Select Current Patient** button. To Print a bill for a group of patients, use the **Select group of patients** button.

## Printing 1500 Claim Forms

### *To print 1500 Claim forms*

- 1** Click the **Print Claims** button in the Billing section of the Billing Ledger. The Reports screen opens.
- 2** Choose the type of form you wish to print.
- 3** Click the **Run** button. The form screen opens.
- 4** In the Form screen:
  - Use the **Select Current Patient** button to run bills for the current patient.
  - Use the **Select groups of patients** button to run bills for a specific group of patients.
  - Use the **Select groups of procedures** button to select a group of procedures.
  - Use the **Report Layout** button to edit the bill's layout.
- 5** Click on **Print** or **Preview** to create a bill or batch of bills.



## Rebilling Charges

You cannot re-bill charges that appear on the Billing Ledger's **Sent** or **Closed** tabs. Helper Software will only bill for charges that appear on the **Ready to Send** tab. If you need to re-bill a charge that appears on the **Sent** or **Closed** tab, you must move it to the **Ready to Send** tab.

You can move a session from the **Sent** or **Closed** tabs to the **Ready to Send** tab one at a time or in batches.

### *To move individual sessions back to Ready to Send*

- 1** On the **Sent** or **Closed** tab and highlight the charge to **rebill**.
- 2** At the top of the ledger, click the **Add Charge to 'Ready to Send'** button. Helper Software will create a copy of the charge on the **Ready to Send** tab. Please note that the charge will now appear on both tabs until it has been re-billed.

### *To move a batch of charges back to Ready to Send*

Click the **Move a Batch of Charges** button at the top of the Billing Ledger to launch the Move a Batch of Charges Wizard and follow the detailed instructions.

# APPENDICES

## APPENDIX A: Installing Helper Software

The following instructions will guide you through the processes of installing Helper Software.



**IMPORTANT:** If you are reinstalling Helper Software, backup your database as a precaution first.

### *To install from CD-ROM*

- 1 Place the CD-ROM in the CD-ROM drive. The Helper Installation Screen will appear.\*
- 2 Click **Install Helper Software**.
- 3 Follow the on-screen instructions to complete the installation.

\* If the Helper Installation Screen does not appear:

- 1 Double-click the **My Computer** icon on the Windows desktop.
- 2 Double-click the icon for your CD-ROM drive. It shows a CD-ROM disc in front.
- 3 Double-click **cdsetup.exe**.
- 4 Click **Install Helper Software** and follow the on -screen instructions to complete the installation.

## APPENDIX B: Backing Up Helper Software

The process of “backing up” takes a snapshot of your Helper Software database. In the event of serious hardware or software failure, you can use your backup to restore all of the vital information about your practice.

We recommend backing up your database every time you use it. For example:

- If you use Helper Software every day, back up every day.
- If you use Helper Software once a week, back up every week.
- If you use Helper Software once a month, back up every month.

You can access the Helper Software Backup utility in three ways:

- From within Helper Software, on the Utilities menu, click **Backup Data**.
- From your Windows desktop, click the Start button, select Programs, select the Helper Software program group, and select **Helper Software Backup**.
- As you are exiting Helper Software, the software will always prompt you to back up your data.

### *To back up your data*

- 1** The **Backup From** panel shows the location of your current Helper Software database (for example *C:\Documents and Settings\All Users\Application Data\Netsmart\Helper\Data\\*.\**) Unless your database is located in a different directory than the default location, there is no need to change this information.
- 2** The **Backup To** panel shows a default zip file named: *c:\backup\Helper\_year—month-day.zip*. (The date will be today’s date.) If you want to select a different destination and filename, click **Browse**.
- 3** Click **OK** to begin the backup.
- 4** Navigate to the location on your ZIP disk where you would like to save the backup and click **Open**.
- 5** Click **OK** to begin the backup.

### *To back up to a CD*

The Helper Software Backup utility will not back up directly to CD-R. However, you can save your backup to a CD using the following instructions.

- 1 Follow the directions for backing up to hard drive.
- 2 Cut and paste the backup file that was created in step 1 to CD using your CD writing software.

## **APPENDIX C: Using Integrity Check**

The Helper Software Integrity check performs important data maintenance and integrity checks on your Helper Software database. Over time, small inconsistencies can develop within Helper Software's database that may cause the software to function improperly. The integrity check is a utility for your database that re-indexes all the information, locating and correcting any minor problems that may have developed. You should run the integrity check either weekly or monthly.

### *To run the integrity check*

- 1 **Exit** from Helper Software.
- 2 From your Windows desktop, select **Start | Programs | Helper Software**, and then select **Helper Software Integrity Check**.
- 3 At the Helper Software Integrity Check screen, click **Begin Checking**.