



Speedy Claims - UB 04 User Guide

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User Guide

Speedy Claims - UB 04

by SpeedySoft USA, Inc

The Speedy Claims - UB 04 is the industry leading form filler from the award winning software company SpeedySoft USA, Inc.

The Speedy Claims - UB 04 is a very easy to use software program and the user needs little guidance to quickly start filling out UB 04 forms.

This User Guide is designed to help you quickly understand the basics of the program operation and some of the intricacies of the UB 04 claim form.

Speedy Claims - UB 04 User Guide

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Foreword

This User Guide is available as this pdf, as a Help File within the UB 04 software and from our website support page as a Print Manual.

First Steps

Part



1 First Steps

1.1 Registration

Registration

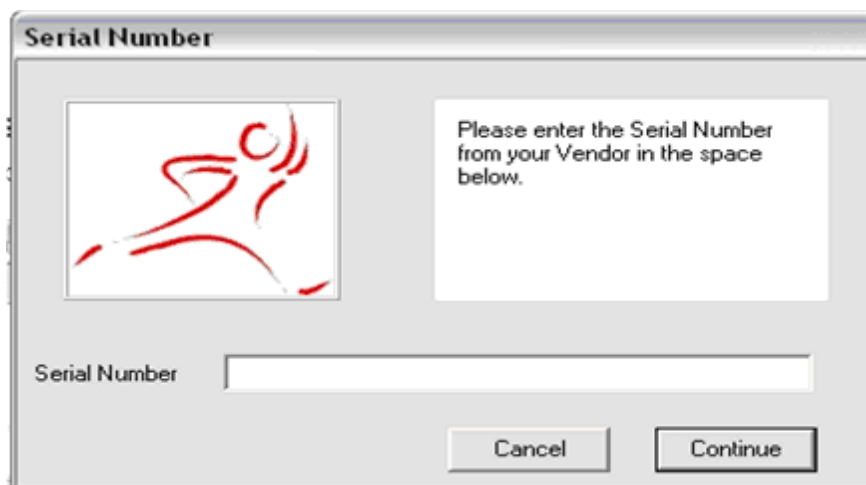
When you first open the software you will see a Registration Notice Popup



If you have not already purchased the software you can click on the Purchase button to go to our website and purchase it.

If you have purchased it already but want to wait until later to register click on the Register Later button.

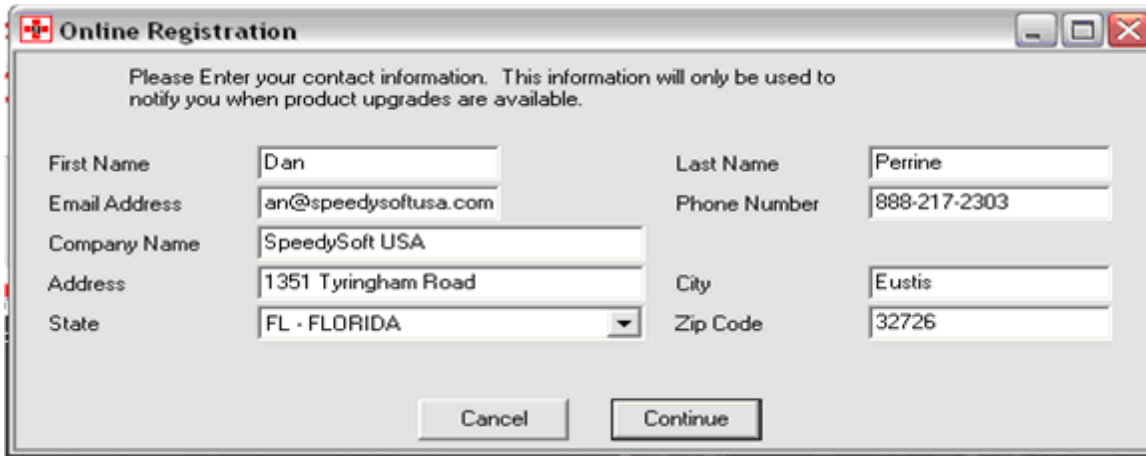
Click on the Register button to begin the Registration process.



Enter the Serial Number you received when you purchased the software and click Continue.

You must be connected to the Internet at this point to finish registering. You will see the following screen

except the fields will be empty.



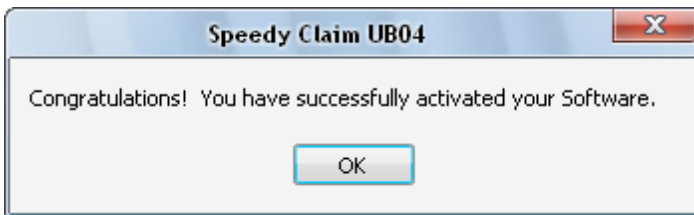
Online Registration

Please Enter your contact information. This information will only be used to notify you when product upgrades are available.

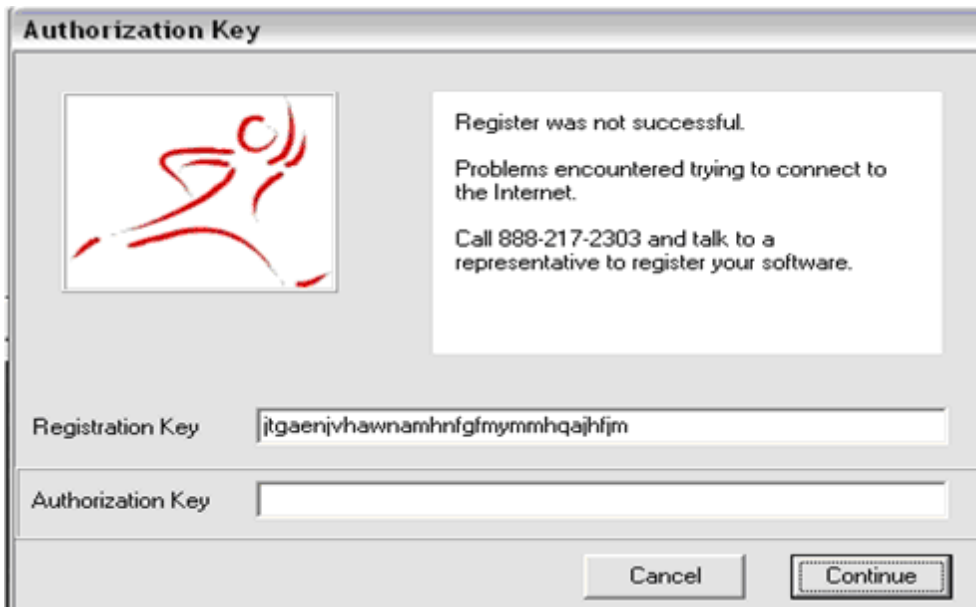
First Name	Dan	Last Name	Perrine
Email Address	an@speedysoftusa.com	Phone Number	888-217-2303
Company Name	SpeedySoft USA		
Address	1351 Tyringham Road	City	Eustis
State	FL - FLORIDA	Zip Code	32726

Cancel Continue


Fill in the fields with your information and click Continue.



If there was a problem along the way you will see the following screen.



Authorization Key



Register was not successful.
Problems encountered trying to connect to the Internet.
Call 888-217-2303 and talk to a representative to register your software.

Registration Key

Authorization Key

Cancel Continue

At this point please call us at the toll free number 888-217-2303 x701 and we will help you get registered.

1.2 Set Up

When you first start the Speedy Claims UB04 you will see a pop-up window asking if you want to go to the setup page. Choose yes.

This page is where you set your preferences and input your default **Provider information**. You can save the data at any time by clicking on the Save icon.



Box # 52 (FL52) - Default Value
 Yes No

Box # 53 (FL53) - Default Value
 Yes No

This option controls whether Box 52 (Release of Information Certification Indicator) and Box 53 (Assignment of Benefits Certification Indication) are pre-populated when you enter a new insurer (payer) name.

Claims List Double-Click Behavior
 Open Claim for New Copy
 Open Claim for Edit

This option sets the default behavior of the mouse double-click on a claim in the Claims List. **Edit** will open the claim and any modification will be made on the original claim. **New Copy** will create a copy of the selected claim and will save any modification, as a **NEW** claim. This setting can be overridden at any time by using the Right Click Menu in the Claim List.

Provider's Default Information (FL01)

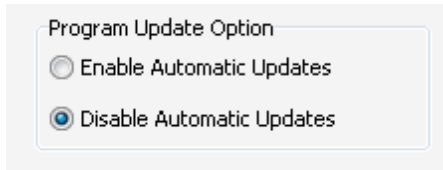
Name	DefaultName	Phone	DefaultPhone
Adress	DefaultAddress		
City - State - Zip	DefaultCity		
NPI	DefaultNPI		
EIN	DefaultEIN		

Default (Pre-Populate ?)
 Yes No

Save

Fill in with the appropriate data. This data will automatically populate Box 01(a,b,c & d), Box 05 (EIN) and Box 56 (NPI) on the form.

NOTE: If you use multiple NPI then insert your most commonly used NPI here and change on the form as needed. Alternatively you can leave this field blank and fill in on the form as needed.



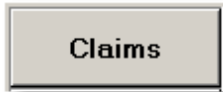
Updates to your Speedy Claims are free. This option tells Speedy Claims how you want to perform the updates. If you choose to not perform automatic updates you can update by clicking on Check for Update under the Help Menu. You must be connected to the Internet and online to receive updates.



Here you can choose whether to print your data onto the pre-printed red forms you can purchase or print the data AND the form onto blank paper.

We highly recommend that you use the pre-printed forms. The insurance companies can scan the data into their software if you use the pre-printed forms because the forms are printed with a specific ink that is invisible to their scanner. If you print the form the ink - even if you print it in red - is NOT invisible to their scanners and they will have to hand enter all of your data into their system. There is a possibility that they could make an unintentional error causing your claim to be rejected.

You are now done with your initial setup and ready to start entering data and creating claims! Click on the Claims button in the Main Menu.



You can return to the Setup screen at any time by clicking on the Settings Button in the left hand Main Menu bar then clicking on the System icon.

Using Speedy Claims

Part



2 Using Speedy Claims

2.1 Main Menu

There are four buttons in the Main Menu along the left hand of the screen.



Claims - This is the menu for viewing, creating and working with claims.

Tables - This menu is where you can create, view and edit patient, provider, insurance company and facility data.

Codes - This is the menu where you manage your CPT, ICD, Revenue and other codes.

Settings - This is the menu for setting up your options, preferences and defaults.

2.1.1 Claims Button

Anytime you want to create new claims, edit existing claims or print claims here is where you start.

Under this button you will find three icons.

- **UB04 Form Entry** - for entering data directly onto the form
- **Claims Lis** - the list of all the claims you have created
- **Tab Entry** - for entering data into sections of the form instead of directly onto the form

2.1.1.1 UB04 Form Entry

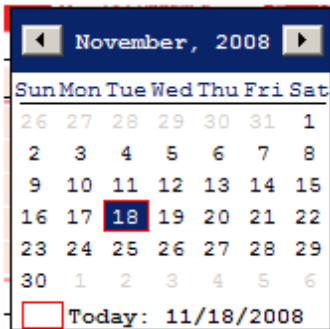
Selecting **UB04 Form Entry** opens a clean form ready for data entry to create a new claim. You can simply fill in the blanks to create a new claim then click Save or **Print**. If you choose to print the form your claim is automatically saved. It is as easy as that. In addition, we have added lots of features to make your claim entry even easier. Read about them below the screenshot below.

- When you create and save a claim all of your data is saved into the appropriate tables AND a copy is stored in the [Claims List](#).

2.1.1.2 Keyboard Shortcuts

- **CTRL +D** is a powerful shortcut. You can use it in nearly every field in the form.

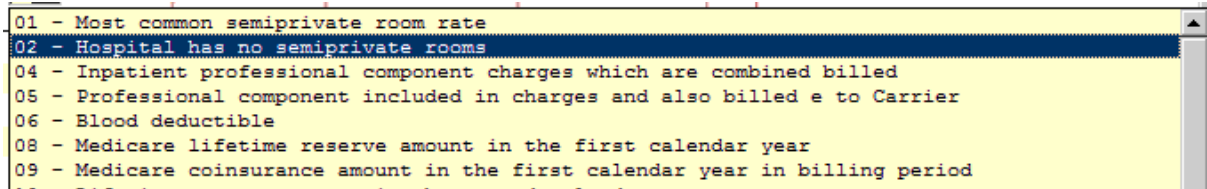
In the date fields it will show you an interactive calendar



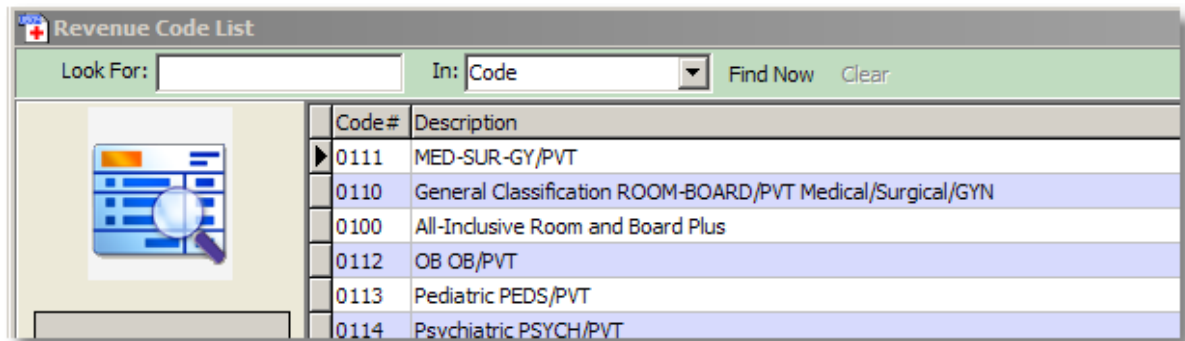
Click on the left/right arrows to quickly change the month. Click on the year and a scroll bar appears to quickly change the year. Double click or Enter will insert the date into the field in the proper format.

In fields 11, 13 - 28, 31 - 36, 39 - 41, 52, 53, 59, and 76 - 79 if you use CTRL +D or Double Click a

drop down list with all the approved choices will appear. Simply select the appropriate one.



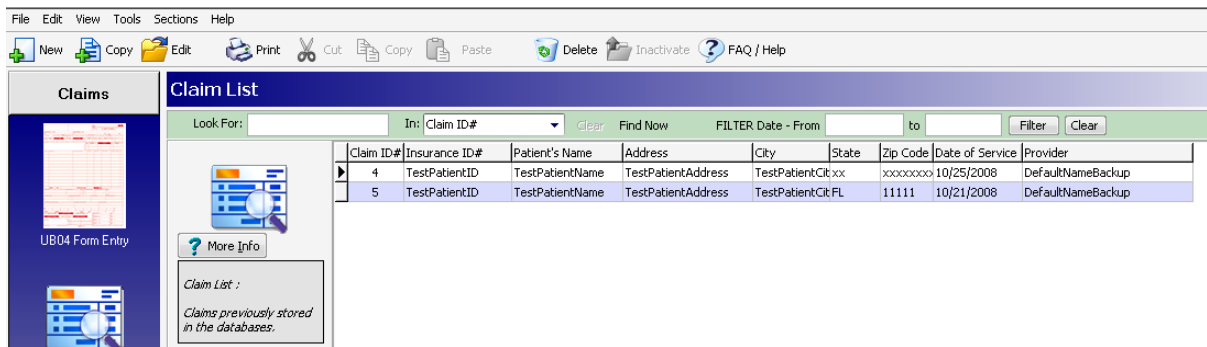
In fields 1, 8, 38, 42, 44, 50, 66, 69 - 72, 74 and 76 - 79 the CTRL +D or Doubling Clicking produces a Pop Up of the appropriate table with your previously saved data. Select the appropriate one.



- **CTRL +H** - Contextual Help - will produce a popup window with information pertinent to the field.
- **ALT +D** - This shortcut will move you to the next section of the form. For instance, if you have finished entering your line items for Fields 42 - 49 and you don't want to tab all the way through the remaining lines use the ALT +D and you will be fast forwarded to Creation Date.
- **CTRL +N** - Creates a new blank record appropriate to where you are. If you are in the Claims List or Form Entry then CTRL +N will produce a clean empty UB 04 form for you to use. If you are in one of the tables or code tables then CTRL +N produces a new line entry for you to fill in with the appropriate data.
- **CTRL +P** - Shortcut for printing a claim. Can be used in the Claims List and Forms Entry.
- **CTRL +S** - Shortcut for saving whatever you are doing. In Forms Entry it will save the claim. In a table it will save the new data you entered.
- **CTRL +C** - Copy can be used to copy data from one field to paste to another.
- **CTRL +V** - Paste
- **CTRL +X** - Cut without copying

2.1.1.3 Claims List

If you click on the Claims icon you can see a list of all the claims you have produced.



From this screen you can Edit an existing claim, Copy an existing claim, **Print** or Delete a claim or create a new claim. There are multiple ways to accomplish all of these actions. We are sure that one of them will suit your style.

1. RIGHT click on an existing claim or batch of claims. You will see a Pop Up Menu with New, Copy, Edit (Form), Edit (Tab), Copy (Tab), Delete, Inactivate and Print. From this menu you can Edit or Copy in your choice of Form Entry Mode or Tab Entry Mode.
2. The menu bar across the top of the page has icons for New, Copy, Edit, Print Delete and Inactivate.
3. The File Menu has options for New, Copy, Edit and Print.

You can sort this and ALL other lists by clicking on the column name. For instance, clicking on the column name City will arrange all the claims alphabetically by City in ascending order. Clicking it again arranges them in descending order. All columns work this same way.

You can also choose which claims to print from this list by "batching". Batching is simply selecting multiple claims for a specific action. You can select multiple claims by holding down your Ctrl key while clicking on the claims you want to select. Once you have the ones selected you can then choose the desired action. Print, Delete, etc.

2.1.1.4 Tab Entry

Selecting **UB04 Tab Entry** opens a 5 part form ready for data entry to create a new claim. You can simply fill in the blanks in one tab section then move on to the next tab to create a new claim then click Save or **Print**. If you choose to print the form your claim is automatically saved. All of the same **Shortcuts** available in the Form Entry are available to you here.

Mode :

1. Provider's Information

Provider Name :

Street Address

City - State - Zip

Phone Number

2. Provider's Pay To Address

Provider Name :

Street Address

City - State - PIN

Phone Number

Patient's Information

3a. Patient Control

3b. Medical Record

4. Type of Bill

5. Federal Tax ID

6. Statement Cover Period From Through

7. N/A

Patient's Admission Information

12. Admission Date

13. Admission Hour

14. Type

15. Source

16. Discharge Hour

17. Status

Patient's Personal Information

8a. Patient Name

8b. Insurance ID

9a. Patient Address

9b. Patient City

Patient's Admission Condition Codes

18. Insurance

19. Special Conditions

20. Student Status

21. Accommodations

24. Prospective Pay

25. Renal Dialysis

26. Others Codes

27. Special Program

2.1.2 Tables Button

All of the data you enter in a claim will be saved. It will be saved as a complete claim in the Claims List. It will also be saved in various specific tables.

[Patient Table](#) - contains all the data specific to a patient.

[Provider/Facility Table](#) - contains all the data specific to a primary provider.

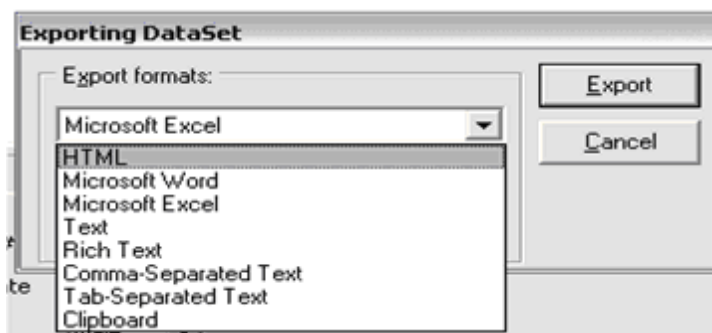
[Insurance Table](#) - contains all the data specific to an insurance company.

[Provider Table](#) - contains data specific to "other" providers.

2.1.2.1 Patient Table

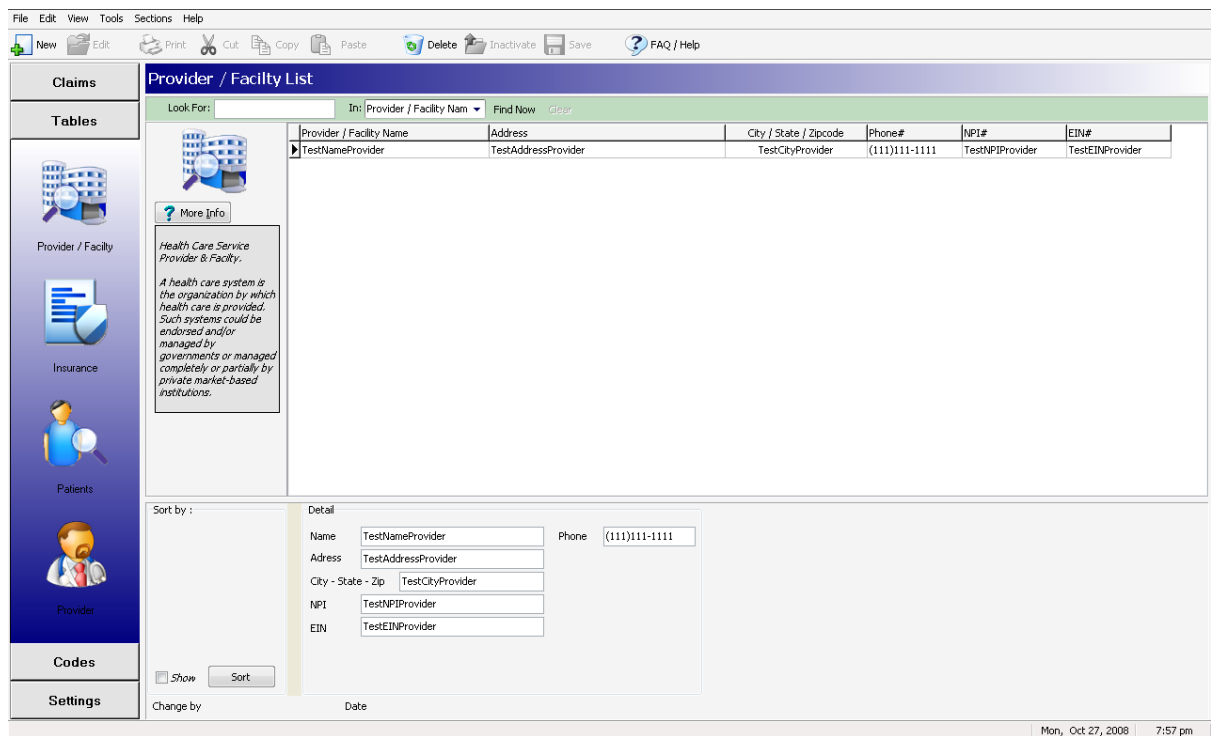
You can Add, Edit, Delete and Export patient data from this screen. Data from this screen fills Blocks 8 through 9 on the form.

- Add Patient - To add a new patient simply click the New icon, fill in the relevant data and click Save.
- Edit Patient - To edit the patient data select the patient from the list, change the data and click Save.
- Delete Patient - To delete a patient from the system select the patient from the list and click the delete icon.
- Export Patient Data - You can export the patient list for use in another program if you wish. Simply click on the export icon and select the format you want to use.

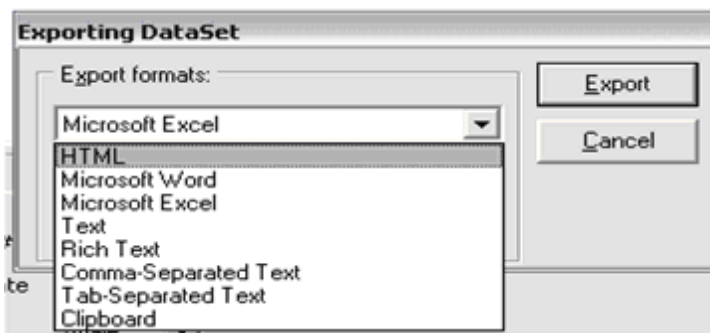


2.1.2.2 Provider / Facility Table

You can Add, Edit, Delete and Export the Service Facility data from this screen. Data from this screen fills Block 01 on the form.

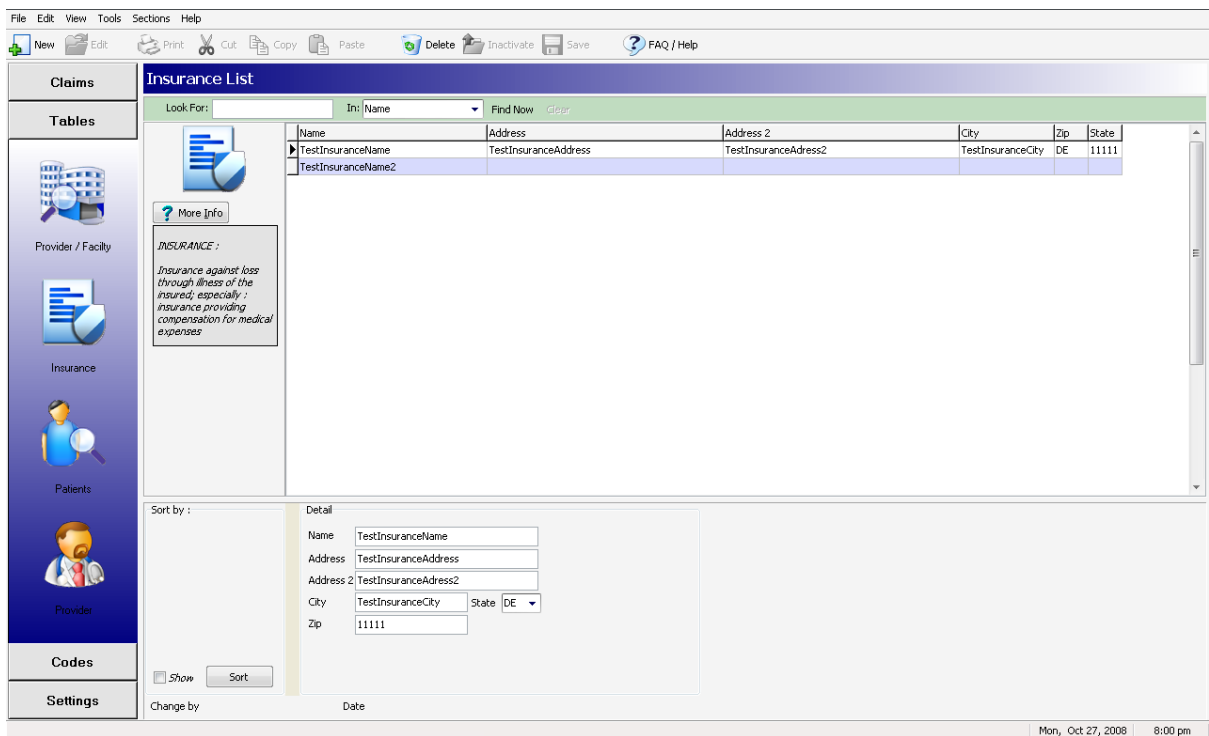


- Add Facility - To add a new Facility simply click the New icon, fill in the relevant data and click Save.
- Edit Facility - To edit the Facility data select the Facility from the list, change the data and click Save.
- Delete Facility - To delete a Facility from the system select the Facility from the list and click the delete icon.
- Export Facility Data - You can export the Facility list for use in another program if you wish. Simply click on the export icon and select the format you want to use.

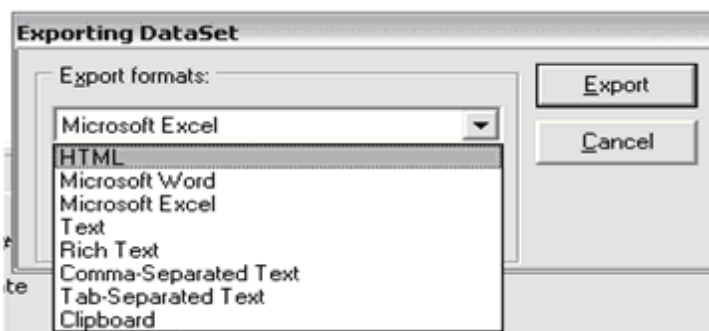


2.1.2.3 Insurance Table

You can Add, Edit, Delete and Export Insurance Company data from this screen. Data from this screen fill the insurance name in the field 50.

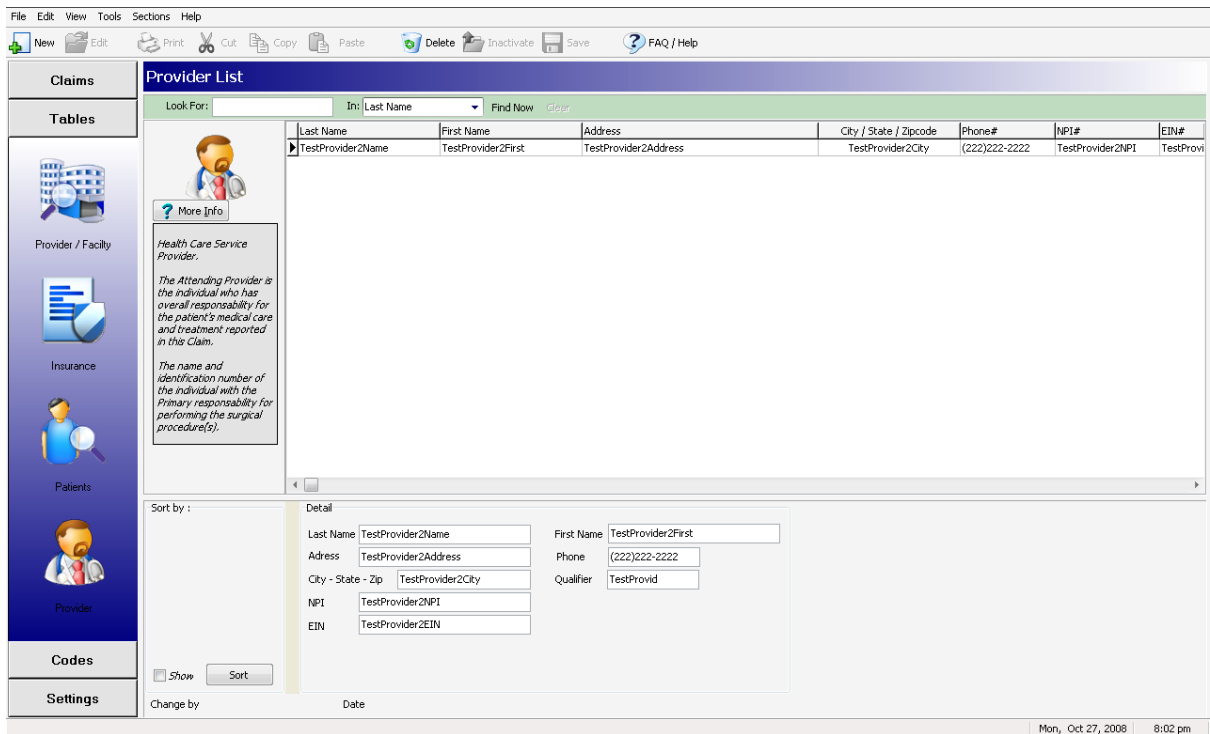


- Add Insurance Company - To add a new Insurance Company simply click the New icon, fill in the relevant data and click Save.
- Edit Insurance Company - To edit the Insurance Company data select the Insurance Company from the list, change the data and click Save.
- Delete Insurance Company - To delete a Insurance Company from the system select the Insurance Company from the list and click the delete icon.
- Export Insurance Company Data - You can export the Insurance Company list for use in another program if you wish. Simply click on the export icon and select the format you want to use.

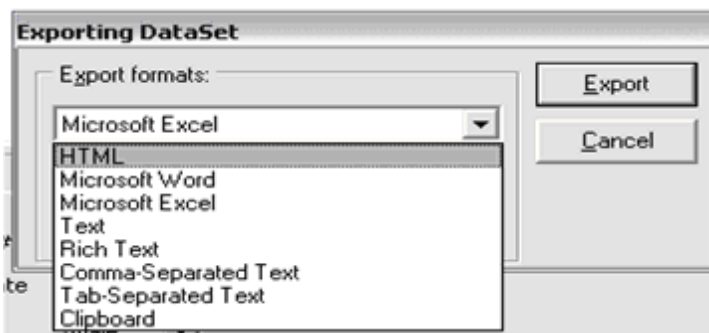


2.1.2.4 Provider Table

You can Add, Edit, Delete and Export Billing Provider data from this screen. Data from this screen fills Block 76 through 79 on the form.



- Add Provider - To add a new Provider simply click the New icon, fill in the relevant data and click Save.
- Edit Provider - To edit the Provider data select the Provider from the list, change the data and click Save.
- Delete Provider - To delete a Provider from the system select the Provider from the list and click the delete icon.
- Export Provider Data - You can export the Provider list for use in another program if you wish. Simply click on the export icon and select the format you want to use.



If you have different ID numbers for use with various insurance entities you can duplicate your data here, changing only the ID number. Then while filling out the form you can double click in Block 33 and choose the appropriate entry.

2.1.3 Codes Button

There are a lot of different code types and codes used in filling out a UB 04 form.

Revenue Codes - Inpatient hospitals must use national revenue codes to summarize the charges for

each Cost Center. Based on information supplied by the Department of Health Care Services (DHCS), EDS uses a file of every facility's established rates to calculate reimbursement for revenue codes.

Diagnosis Codes - used to group and identify diseases, disorders, symptoms, and medical signs, and are used to measure morbidity and mortality.

HCPCS Codes - a set of health care procedure codes based on the American Medical Association's Current Procedural Terminology (CPT).

PPS Codes - Code assigned to the Claim to identify the DRG based on the grouper software called for under contract with the primary payer.

ECI Codes - The ICD diagnosis codes pertaining to external cause of injuries, poisoning, or adverse effect.

ICD Procedure Codes - The ICD code that identifies the inpatient principal procedures performed at the claim level during the period covered by this bill and the corresponding date.

Code Codes - used to report additional codes related to a Form Locator (overflow) or to report externally maintained codes approved by the NUBC for inclusion in the institution data set.

Occurrence Codes - Describes an event and the date it happened used with MSP value code(s).

2.1.3.1 Revenue Code List

You can manage your Revenue codes from the Revenue code list under the Codes Button in the **Main Menu**.

Click on the Codes Button in the **Main Menu**, then click on the Revenue icon. You will see the following screen.

Revenue Code List

Look For: In: Code

Code#	Description
0111	MED-SUR-GY/PVT
0110	General Classification ROOM-BOARD/PVT Medical/Surgical/GYN
0100	All-Inclusive Room and Board Plus
0112	OB OB/PVT
0113	Pediatric PED5/PVT
0114	Psychiatric PSYCH/PVT
0116	Detoxification DETOX/PVT
0117	Oncology ONCOLOGY/PVT
0118	Rehabilitation REHAB/PVT
0119	Other OTHER/PVT General Classification
0120	ROOM-BOARD/SEMI
0121	Medical/Surgical/GYNMEDSUR-GY/2BED
0122	OB - OB/2BED
0123	Pediatric - PED5/2BED
0124	Psychiatric - PSTAY/2BED
0136	Detoxification -DETOX/3&4BED
0137	Oncology -ONCOLOGY/3&4BED
0138	Rehabilitation -REHAB/3&4BED
0139	Other - OTHER/3&4BED
0150	General Classification -ROOM-BOARD/WARD

Revenue Codes :

Inpatient hospitals must use national revenue codes to summarize the charges for each Cost Center.

Based on information supplied by the Department of Health Care Services (DHCS), ED5 uses a file of every facility's established rates to calculate reimbursement for revenue codes.

Sort by :

Detail

Code #

Description

Show

Change by Date 12/30/1899

As you can see, the software does not contain any Revenue codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New icon or by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Detail

Code #

Description

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

The Revenue codes listed here are used in Block 42 on the form. If you are filling out a new claim form you can simply double click in Block 42 to bring up this list. Then you can import your choice of codes by double clicking on the code itself. This will take you back to the form for further entry.

2.1.3.2 Diagnosis Code List

You can manage your Diagnosis codes from the Diagnosis code list under the Codes Button in the [Main Menu](#).

Click on the Codes Button in the [Main Menu](#), then click on the Diagnosis icon. You will see the following

screen.

Diagnosis Code List

Look For: In: Code Find Now Clear

Code	Description
838	DISLOCATION OF FOOT
838.0	CLOSED DISLOCATION OF FOOT
838.00	CLOSED DISLOCATION OF FOOT UNSPECIFIED PART
838.01	CLOSED DISLOCATION OF TARSAL (BONE) JOINT UNSPECIF
838.02	CLOSED DISLOCATION OF MIDTARSAL (JOINT)
838.03	CLOSED DISLOCATION OF TARSOMETATARSAL (JOINT)
838.04	CLOSED DISLOCATION OF METATARSAL (BONE) JOINT UNSP
838.05	CLOSED DISLOCATION OF METATARSOPHALANGEAL (JOINT)
838.06	CLOSED DISLOCATION OF INTERPHALANGEAL (JOINT) FOOT
838.09	CLOSED DISLOCATION OF OTHER PART OF FOOT

Sort by :

Detail

Code #

Description

Show

Change by Date 12/30/1899

As you can see, the software does not contain any Diagnosis codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New icon or by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Detail

Code #

Description

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

Code	Description
838	DISLOCATION OF FOOT
838.0	CLOSED DISLOCATION OF FOOT
838.00	CLOSED DISLOCATION OF FOOT UNSPECIFIED PART
838.01	CLOSED DISLOCATION OF TARSAI (BONE) JOINT UNSPECIF
838.02	CLOSED DISLOCATION OF MIDTARSAL (JOINT)
838.03	CLOSED DISLOCATION OF TARSOMETATARSAL (JOINT)
838.04	CLOSED DISLOCATION OF METATARSAL (BONE) JOINT UNSP
838.05	CLOSED DISLOCATION OF METATARSOPHALANGEAL (JOINT)
838.06	CLOSED DISLOCATION OF INTERPHALANGEAL (JOINT) FOOT
838.09	CLOSED DISLOCATION OF OTHER PART OF FOOT

The Diagnosis codes listed here are used in Block 67 on the form. If you are filling out a new claim form you can simply double click in Block 67 to bring up this list. Then you can import your choice of codes by double clicking on the code itself.

2.1.3.3 HCPCS Code List

You can manage your HCPCS codes from the HCPCS code list under the Codes Button in the [Main Menu](#).

Click on the Codes Button in the [Main Menu](#), then click on the HCPCS icon. You will see the following screen.

The screenshot shows the 'HCPCS Procedures Code List' window. The table of procedure codes is as follows:

Code	Designation	Fee
5078	NUNDC ICRA PLMT/RPLCMT VENTR. CATH SHUNT SYS	132.32
5079	NUNDC ICRA DSJ ADS FENESTRATION SEPTUM CSTS	122.00
5080	NUNDC ICRA FENESTRATION/EXC CST PLMT CATH DRG	234.76
5081	NUNDC ICRA W/RETRIEVAL FB	0
5082	NUNDC ICRA EXC TUM PLMT CATH DRG	0
5083	NUNDC ICRA EXC PITUITARY TUM	0
5084	VENTRICULOCISTERNOSTOMY	0
5085	CRTJ SHUNT SARACH/SDRL-ATR-JUG-AUR	0
5086	CRTJ SHUNT SARACH/SDRL-PRTL-PLEURAL OTH	0
5087	RPLCMT/IRRG SARACH/SDRL CATH	0

The 'Detail' section for code 62160 shows:

- Code #: 62160
- Description: NUNDC ICRA PLMT/RPLCMT VENTR. CATH SHUNT SYS
- Fee: \$ 132.32

As you can see, the software does not contain any HCPCS codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New

icon or by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Detail	
Code #	62160
Description	NLUNDSC ICRA PLMT/RPLCMT VENTR CATH SHUNT SYS
Fee	\$ 132.32

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

The HCPCS Code list works the same as the Diagnosis Code list but has an additional field for your fee for the procedure. If you have different fees for different payers you can simply add the code with a different fee. I would suggest changing the description to reflect the appropriate payer. An example is below.

Code	Designation	Fee
5078	NLUNDSC ICRA PLMT/RPLCMT VENTR CATH SHUNT SYS	132.32
5079	NLUNDSC ICRA DSJ ADS FENESTRATION SEPTUM CSTS	122.00
5080	NLUNDSC ICRA FENESTRATION/EXC CST PLMT CATH DRG	234.76
5081	NLUNDSC ICRA W/RETRIEVAL FB	0

The Procedure codes listed here are used in Block 44 on the form. If you are filling out a new claim form you can simply double click in Block 44 to bring up this list. Then you can import your choice of codes by double clicking on the code itself. The fee will also be imported into Block 44.

2.1.3.4 PPS Code List

You can manage your PPS codes from the PPS code list under the Codes Button in the [Main Menu](#).

Click on the Codes Button in the [Main Menu](#), then click on the PPS icon.

As you can see, the software does not contain any PPS codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New icon or by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

The PPS codes listed here are used in Block 71 on the form. If you are filling out a new claim form you can simply double click in Block 71 to bring up this list. Then you can import your choice of codes by double clicking on the code itself.

2.1.3.5 ECI Code List

You can manage your ECI codes from the ECI code list under the Codes Button in the [Main Menu](#).

Click on the Codes Button in the [Main Menu](#), then click on the ECI icon.

As you can see, the software does not contain any ECI codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New icon or

by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

The ECI codes listed here are used in Block 72 on the form. If you are filling out a new claim form you can simply double click in Block 72 to bring up this list. Then you can import your choice of codes by double clicking on the code itself.

2.1.3.6 Diagnosis/Procedure Code List

You can manage your Diagnosis/Procedure codes from the Diagnosis/Procedure code list under the Codes Button in the [Main Menu](#).

Click on the Codes Button in the [Main Menu](#), then click on the Diagnosis/Procedure icon.

As you can see, the software does not contain any Diagnosis/Procedure codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New icon or by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

The Diagnosis/Procedure codes listed here are used in Block 74 on the form. If you are filling out a new claim form you can simply double click in Block 74 to bring up this list. Then you can import your choice of codes by double clicking on the code itself.

2.1.3.7 Codes Code List

You can manage your Code codes from the Code code list under the Codes Button in the [Main Menu](#).

Click on the Codes Button in the [Main Menu](#), then click on the Code icon.

As you can see, the software does not contain any Code codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New icon or by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

The Code codes listed here are used in Block 81 on the form. If you are filling out a new claim form you can simply double click in Block 81 to bring up this list. Then you can import your choice of codes by double clicking on the code itself.

2.1.3.8 Occurrence Code List

You can manage your Occurrence codes from the Occurrence code list under the Codes Button in the [Main Menu](#).

Click on the Codes Button in the [Main Menu](#), then click on the Occurrence icon.

As you can see, the software does not contain any Occurrence codes when it is first installed. You can add the appropriate codes for your practice individually by clicking on File then New, clicking on the New icon or by using your Ctrl - N keys. This will bring up the input fields at the bottom of the page.

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon or use your Ctrl - S keys to save the code. You can edit any code by simply highlighting the code and changing the data in the above fields and clicking Save.

The Occurrence codes listed here are used in Block 31 through 36 on the form. If you are filling out a new claim form you can simply double click in Block 31 through 36 to bring up this list. Then you can import your choice of codes by double clicking on the code itself.

2.1.4 Set Up Button

2.1.4.1 Set Up

When you first start the Speedy Claims UB04 you will see a pop-up window asking if you want to go to the setup page. Choose yes.

This page is where you set your preferences and input your default [Provider information](#). You can save the data at any time by clicking on the Save icon.



Box # 52 (FL52) - Default Value
 Yes No

Box # 53 (FL53) - Default Value
 Yes No

This option controls whether Box 52 (Release of Information Certification Indicator) and Box 53 (Assignment of Benefits Certification Indication) are pre-populated when you enter a new insurer (payer) name.

Claims List Double-Click Behavior
 Open Claim for New Copy
 Open Claim for Edit

This option sets the default behavior of the mouse double-click on a claim in the Claims List. **Edit** will open the claim and any modification will be made on the original claim. **New Copy** will create a copy of the selected claim and will save any modification, as a **NEW** claim. This setting can be overridden at any time by using the Right Click Menu in the Claim List.

Fill in with the appropriate data. This data will automatically populate Box 01(a,b,c & d), Box 05 (EIN) and Box 56 (NPI) on the form.

NOTE: If you use multiple NPI then insert your most commonly used NPI here and change on the form as needed. Alternatively you can leave this field blank and fill in on the form as needed.

Updates to your Speedy Claims are free. This option tells Speedy Claims how you want to perform the updates. If you choose to not perform automatic updates you can update by clicking on Check for Update under the Help Menu. You must be connected to the Internet and online to receive updates.

Here you can choose whether to print your data onto the pre-printed red forms you can purchase or print the data AND the form onto blank paper.

We highly recommend that you use the pre-printed forms. The insurance companies can scan the data into their software if you use the pre-printed forms because the forms are printed with a specific ink that is invisible to their scanner. If you print the form the ink - even if you print it in red - is NOT invisible to their scanners and they will have to hand enter all of your data into their system. There is a possibility that they could make an unintentional error causing your claim to be rejected.

You are now done with your initial setup and ready to start entering data and creating claims! Click on the Claims button in the Main Menu.



You can return to the Setup screen at any time by clicking on the Settings Button in the left hand Main Menu bar then clicking on the System icon.

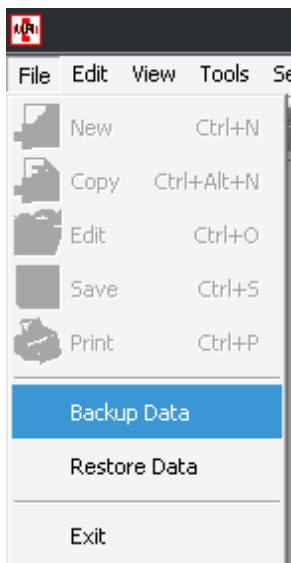
2.2 Backing Up

Backing Up

We have a built in Backup and Restore system to help protect your data and work in case of a computer crash. It is very simple to use and we highly recommend you backup your data every time you use Speedy Claims.

Backing Up

When you are done working for the day or at any other time you choose simply click on File then Data Backup.



You will be prompted for a file name and location to store the file. We suggest that you use the same file name and location every time. This will overwrite the existing file with the latest data.

We suggest that you store you backup file in My Documents and that you frequently copy this file to a cd or flash drive or external backup source in case your whole computer crashes. There is an online backup service that is super easy to use and that will take care of the task for you effortlessly. You can just set it once and forget it. Click [HERE](#) to read more about it.

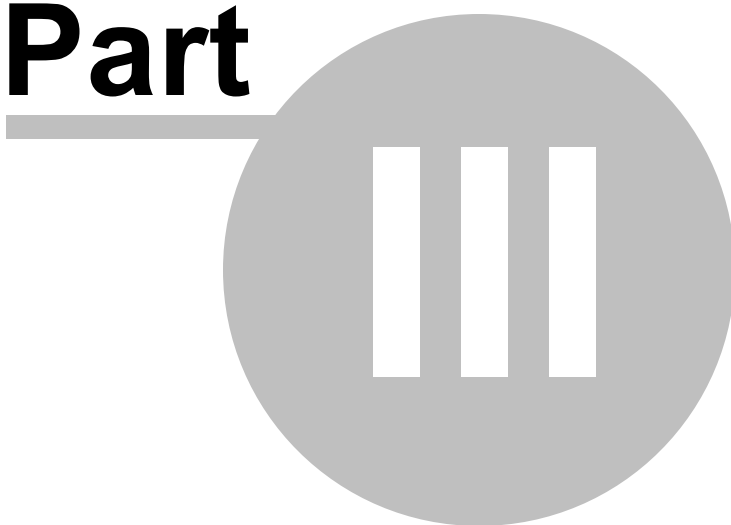
Restoring

To restore your database after a catastrophic failure and reinstall of the software you simply click on File then Data Restore. You will be prompted for the name and location of your backup file. Select it and click Open. This will restore your data.

Please note that this function is not for moving data between computers or exporting the data to another program. If you perform a Restore function on an existing database you may end up with duplicate data and a corrupt database.

Printing Claims

Part



3 Printing Claims

3.1 Printing

You have two options for printing your claims.

- You can print your claims onto the pre-printed red forms you can purchase from many vendors.
- You can print your claims onto a blank sheet of paper. This option prints the form and the data in black.

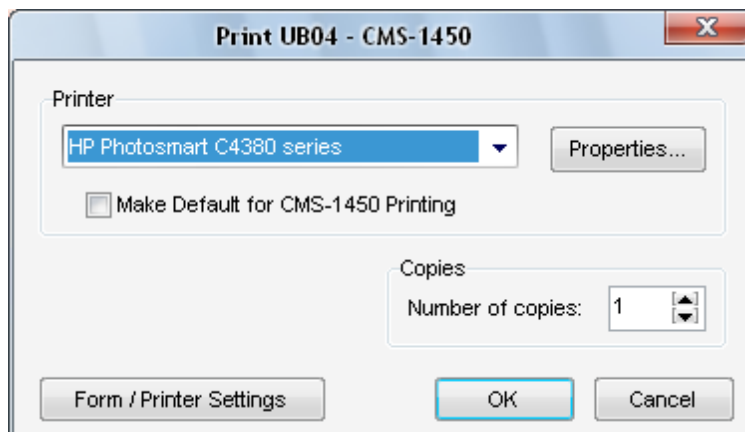
You can set the option in the [Set Up](#) menu under the Settings button.

We do NOT recommend that you print the claim onto a blank sheet of paper for three reasons.

1. The number of insurance companies that will accept them is decreasing constantly. They do not want them because they have to hand enter all the data into their systems. If the claim is on the pre-printed forms they can scan them into the system in seconds. The peculiar red ink that is used on the commercial forms disappears when scanned. Printing the forms with red ink will not help because it has to be a very specific OCR red ink to disappear.
2. When they hand enter YOUR data into their systems they can and do make mistakes. These mistakes can cost you delays and be causes for claim rejections costing you money.
3. Most folks want to print the form to save money. But you can buy the forms from us for only less than 2 cents per form. When you add up the cost of the paper you print on and the additional ink you use you are not saving any money printing your own forms.

Printing can be done claim by claim as you create them or you can print them later from the [Claims List](#). If you print a claim when you create it, the claim is automatically saved to the [Claims List](#). Alternatively, you can save the claims as you create them and "batch" print them at a later time. Open the Claims List found under the Claims button in the Main Menu. Select the claim you want to print from the list by left clicking on it once. Then click on Print. You can select multiple claims to print at the same time by holding down your Ctrl key while selecting the claims from the list.

When you click on the print icon the printer dialog box opens.

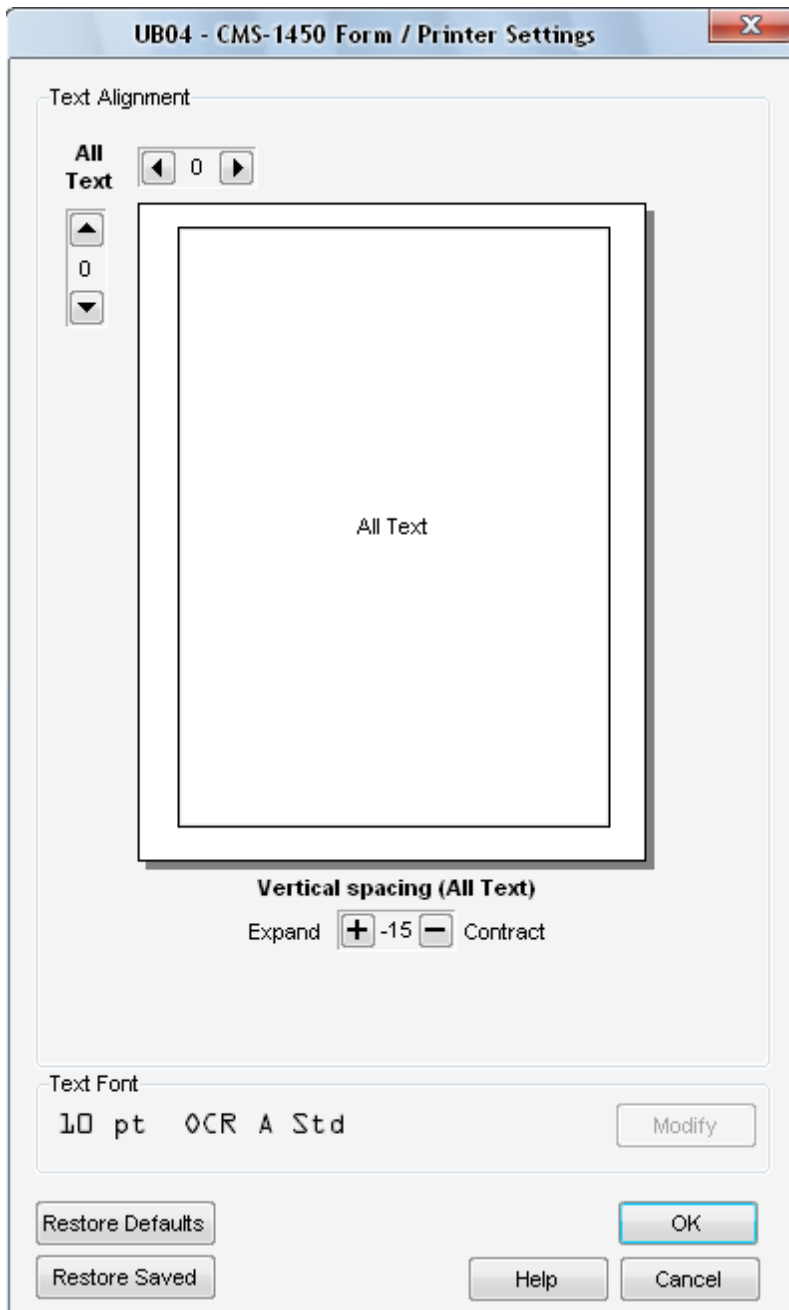


If you have any alignment problems the Form/Printer Settings button in the lower left corner of the dialog box is where you go to fix them.

3.2 Printer Alignment Guide

If your printer does not line all the data fields up correctly with the standard OCR red forms there are a few simple steps you can take to align the software to your printer. We created the Form/Printer Settings program to make it easy for you. You can access the program by choosing a form to print then selecting the Form/Printer Settings button in the lower left of the printer dialog box.

We will discuss using the All Text tool first as it solve 95% of all alignment problems.



The All Text Tool

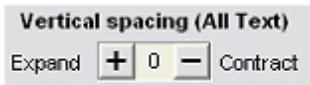
The All Text tool, as its name implies, will move **all** the text on a form an equal amount in one direction or another. For instance, if all of your text was printing a little low on the page then you would select the up arrow under All Text to move the text upward on the page as in the example here.



Each click of this tool will move the characters approximately .02 inches. Six clicks will move the text about 1/8 of an inch which is about equal to one character width or height. You can move the text either left or right and either up or down on the page.

The Vertical Text Tool

If your printer starts the top of the form correctly but the text gets progressively farther and farther off alignment as you go down the page then this is the tool to use.



If the text is correct at the top of the page but too high at the bottom then you will Expand the spacing. If it is too low at the bottom of the page you will Contract the spacing. Each click of this tool will move the bottom text approximately .05 inches. Five clicks will move the bottom text about 1/4 inch.

The program will save your settings automatically when you leave the Printer Alignment window.

Restore Tool



Clicking on Restore Defaults will reset the settings to 0. Clicking on Restore Saved will reset the settings to your saved settings.

Dot Matrix Printers

A common problem with dot matrix printers is that their default settings do not allow them to print close to the bottom of the page and parts of the data will not print. In this case, you must find the default setup for your printer and change the setting.

Occasionally dot matrix printers will override the software settings and use their default font and spacing settings throwing off the print. In this case again, you must find the setup for your printer and allow it to be software controlled.

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