

# SPEEDY CLAIMS



## USER GUIDE

1.

### **Speedy Claims V7 User Guide**

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User guide

2024

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## Speedy Claims V7 - CMS 1500 User Guide



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Note:

To change the product logo for your own print manual or PDF, click "Tools > Manual Designer" and modify the print manual template.

# SPEEDY CLAIMS



# USER GUIDE

## **by SpeedySoft USA, Inc**

*The Speedy Claims - CMS 1500 is the industry leading form filler from the award winning software company SpeedySoft USA, Inc.*

*The Speedy Claims - CMS 1500 is a very easy to use software program and the user needs little guidance to quickly start filling out CMS 1500 forms.*

*This User Guide is designed to help you quickly understand the basics of the program operation and some of the intricacies of the CMS 1500 claim form.*

# Speedy Claims V7- CMS 1500 User Guide

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*To Becky Jagers who helped so much in the design and testing of the CMS-1500 software.*

## Foreword

This User Guide is available as this pdf, as a Help File within the Speedy Claims V7 software and from our website support page as a Print Manual.

# Part 1: First Steps / Registration



## 1.0 - Installing Speedy Claims

If you have not already installed Speedy Claims, the [download](https://www.speedysoftusa.com/downloads.html) is located on our website at <https://www.speedysoftusa.com/downloads.html>

Select Download under the Speedy CMS 1500

DOWNLOAD YOUR FREE 30 DAY TRIAL



Speedy CMS 1500

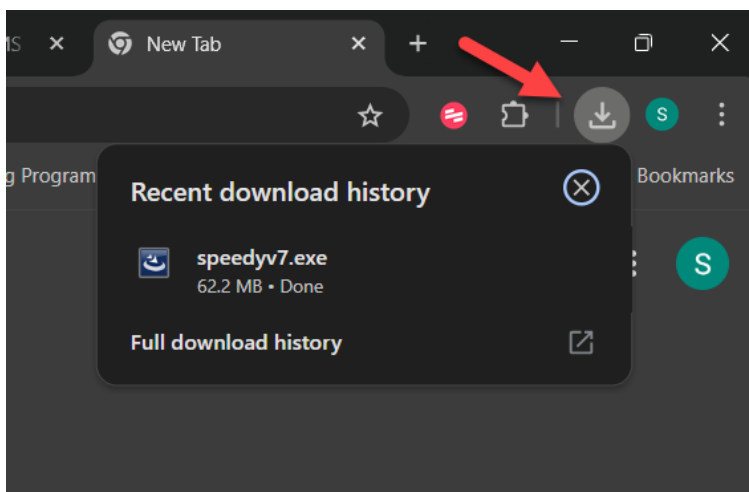
DOWNLOAD



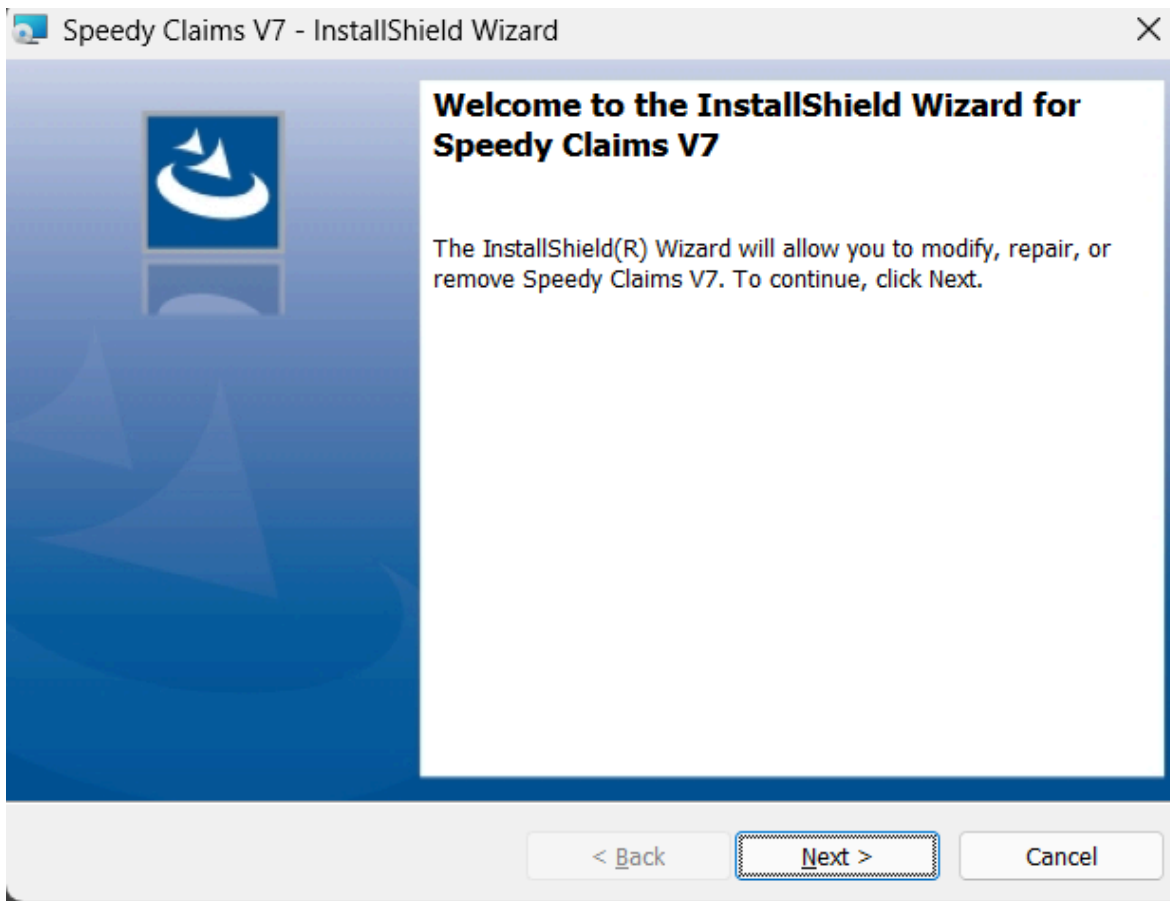
Speedy UB 04

DOWNLOAD

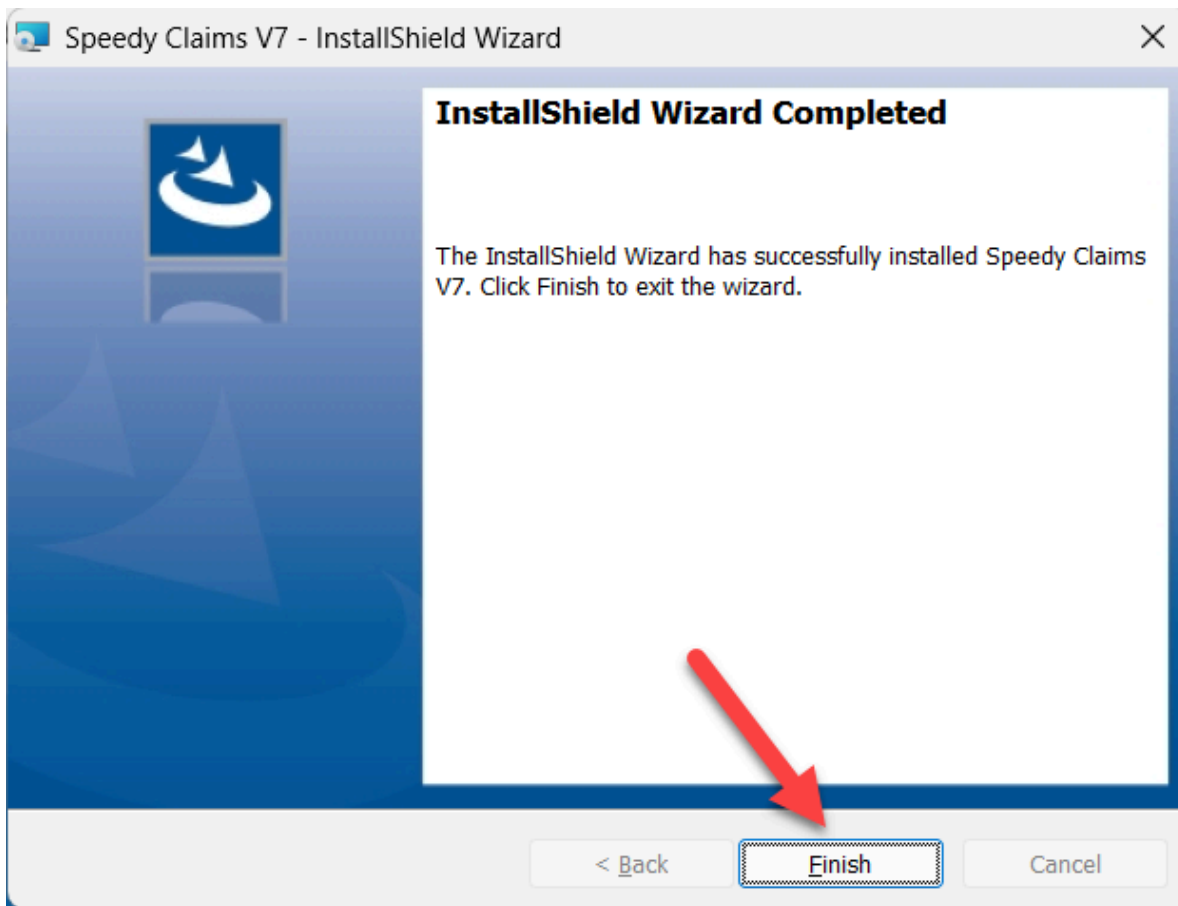
In most browser's, your download will show in the upper right of your window. If you do not see it there, go to your downloads folder.



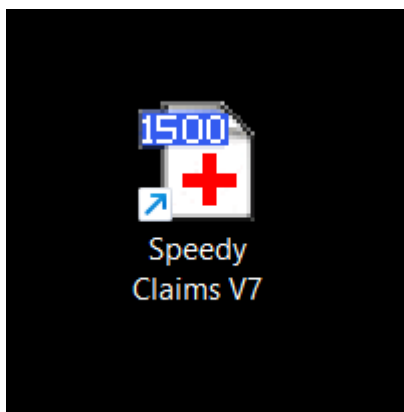
Click on the speedyv7.exe to open and run the application installer.



Follow the installer prompts until it is finished.

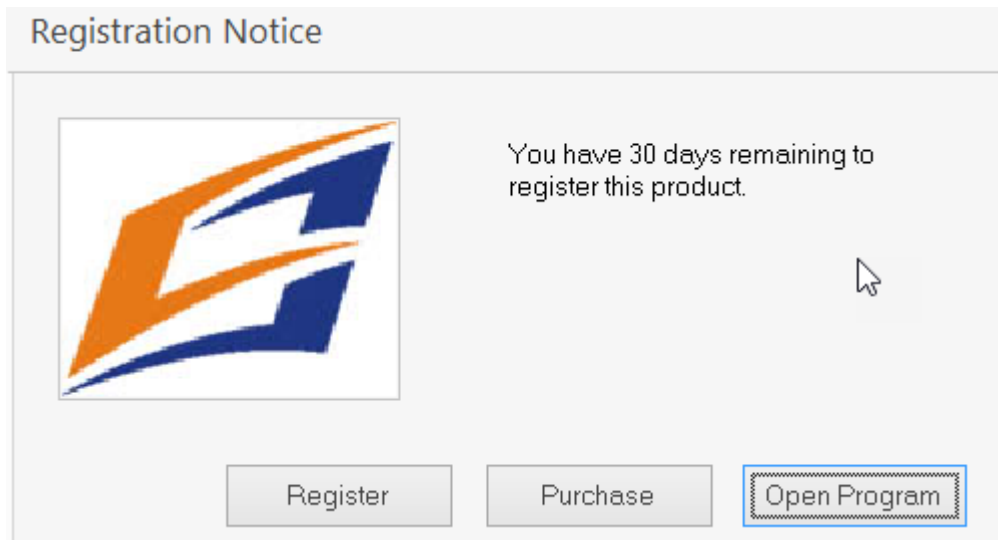


Once the install is completed, you will see the program icon on your desktop.

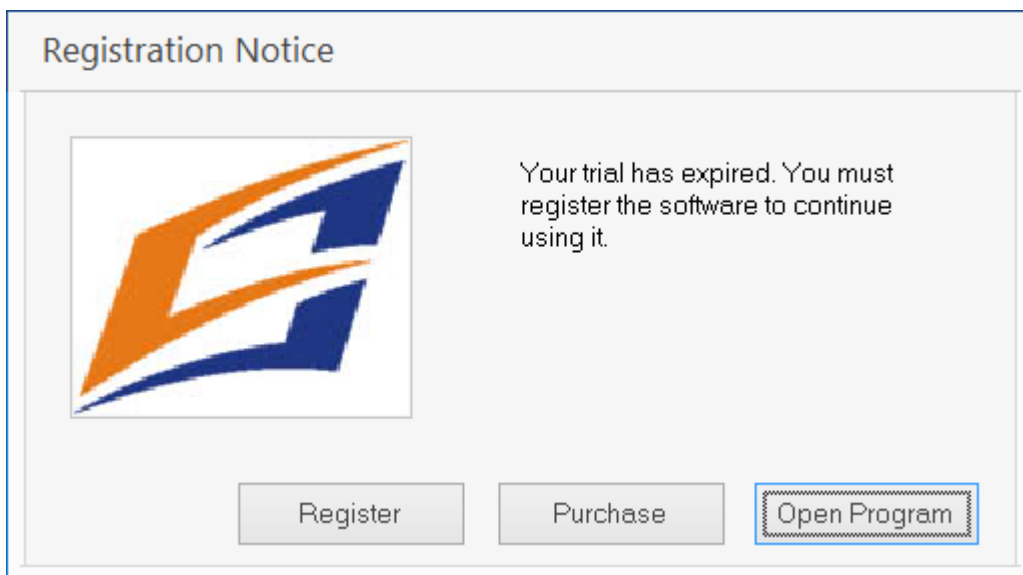


## 1.1 Registration

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

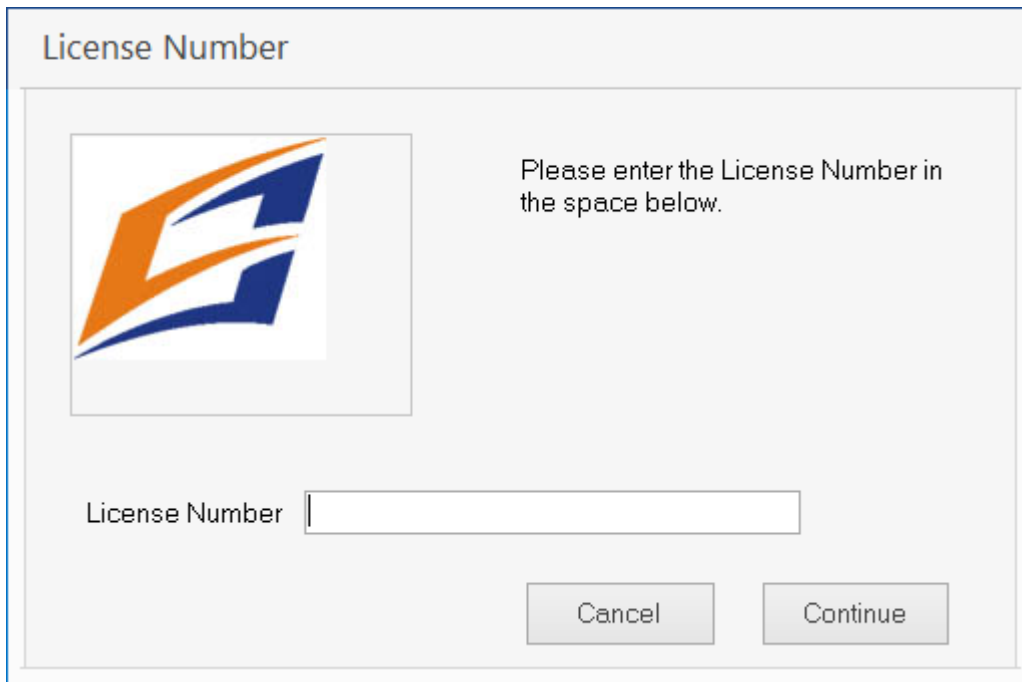


The 30 days remaining message is mainly for new users. During this period, select Open Program to access Speedy Claims. If the 30 days run out, a message to register will appear with no more days remaining. The program does not remove itself. Once registered, all previous data entered during the 30 day trial will be in your program.



If you have not already subscribed to the software, you can click on the Purchase button to visit our website and subscribe.

Click on the Register button to begin the Registration process.



The image shows a software dialog box titled "License Number". On the left side, there is a square area containing a logo with orange and blue stylized shapes. To the right of the logo, the text reads "Please enter the License Number in the space below." Below this text is a text input field with the label "License Number" to its left. At the bottom right of the dialog box, there are two buttons: "Cancel" and "Continue".

Enter the License Number you received when you subscribed to the software and click Continue.

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

## 1.2 Online Registration

"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	<input type="text" value="Matt"/>	Last Name	<input type="text" value="Lester"/>
Business Email	<input type="text" value="matt@speedysoftusa.co"/>	Business Phone	<input type="text" value="(844)267-1500"/>
Company Name	<input type="text" value="SpeedySoft USA"/>		
Address	<input type="text" value="123 ST"/>	City	<input type="text" value="Eustis"/>
State	<input type="text" value="FL - FLORIDA"/>	Zip Code	<input type="text" value="32726"/>

Fill in the fields with your information and click Continue.

Speedy Claims

Congratulations! You have successfully Registered your Software.



# 27 – Accept Assignment and

# all of 31, 32 and 33.

Once completed, click on **Save** at the top. When creating new claims, this information will populate automatically when you fill out the claim.

Additional [templates](#) can be created for additional rendering or billing providers by selecting New at the upper left. At the top right, give it a different Template Name and make your changes. Save when you are done. With multiple templates, ensure you select the correct one on your main CMS-1500 form before entering your claim data.

The screenshot displays the CMS 1500 form interface. At the top, there are navigation buttons for 'CMS 1500 Claim' and 'Claims List'. Below this is a menu bar with options like 'New', 'Cut', 'Copy', 'Paste', 'Create Batch', 'Close Batch', 'Scrub', 'Print', 'Save', and 'Cancel'. On the left, a sidebar titled 'Speedy Claims' offers quick access to 'Claims', 'Tables', 'Codes', 'Setup', 'Tools', and 'Scheduler'. The main form area is titled 'CMS 1500 - 02/12 (With NPI)' and includes a 'Need Help? 1-844-267-1500' link. The form fields include 'Template: Template 1', 'Mode: Template 1', and 'Status: Template 2'. A red arrow points to the 'Template: Template 1' dropdown menu. The form also features a QR code, a 'Payor ID' field, and a 'HEALTH INSURANCE CLAIM FORM' section with various checkboxes and input fields for patient and insurer information.

# Part 2: Using Speedy Claims:

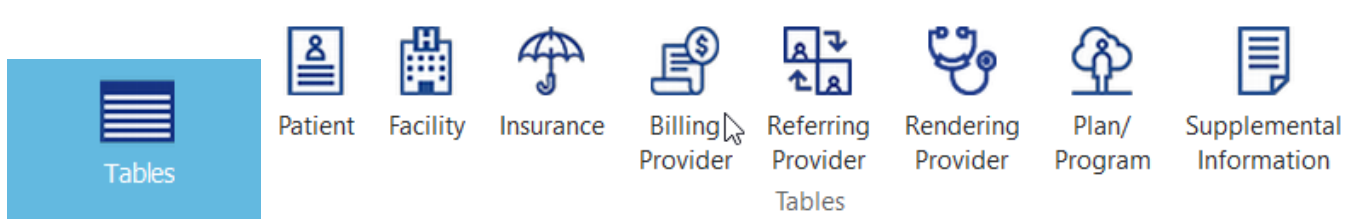


## 2.1 Main Menu

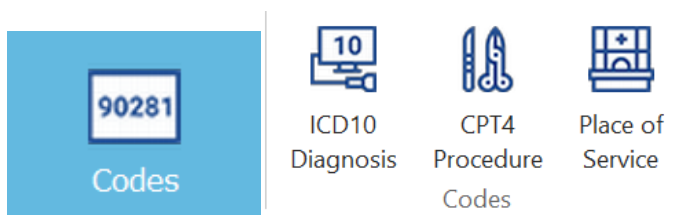
There are seven buttons in the Main Menu, located along the left-hand side of the screen.



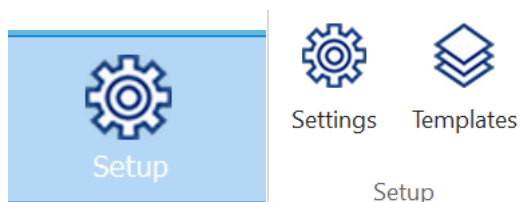
**Claims** - This is the menu for viewing, creating and working with claims.




**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 custom code libraries











**Setup** - This menu allows you to configure your default settings and create templates.

 <b>Tools</b>	• Data Backup	• Print Blank Form - Front	• Buy Forms
	• Data Restore	• Print Blank Form - Back	• Program Info
	• Calculator	• Test Printer Alignment	• Deregister
Tools			


**Tools** - This section is for additional functions including your recommended Data Backup

  
**Scheduler**

**Scheduler** - If you have the scheduler function, this will pull up your patient scheduler application.

 <b>Ledger</b>							
	Claims List	Patient Statement List Main	Bundled Statement	Patient Reports	Insurance Reports Reports	Global Report	Ledger Settings Settings

**Ledger** - If you have the Speedy Claims Suite, the Ledger option will be available and pull up your Ledger options

 <b>Help</b>	• Quick Start Guide	• NUCC 1500 Claim Form Instruction Manual
	• User Manual	• Medicare 1500 Claims Processing Manual
	• Online Help	• Contact Support
Help		

**Help** - This section contains resources to assist with your billing and software functions

## 2.1.1 Claims Button

Whenever you need to create new claims, edit existing claims, or print claims, this is where you begin.

By clicking on the Claims button, you will see 2 options above.

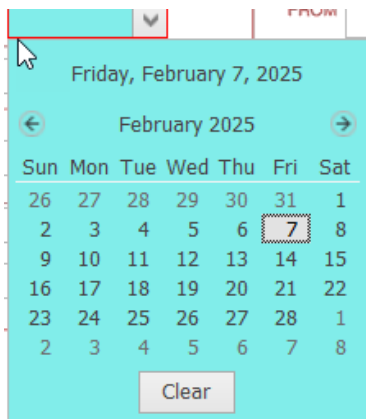
- [CMS 1500 Claim](#) - for entering data directly onto the form
- [Claims List](#) - the list of all the claims you have created

### 2.1.1.1 CMS 1500 Claim Form

Selecting **CMS 1500 Claim** 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. Additionally, we have added numerous features to make your claim entry even easier.

### 2.1.1.2 Keyboard Shortcuts

In the date fields, you can manually enter the date in a mm/dd/yyyy format. The drop-down arrow will display an interactive calendar with the current date preselected..



Click on the left/right arrows or scroll to quickly change the month. Click on the desired date to insert the date into the field in the proper format.

**CTRL +D** is a powerful shortcut. You can use it in nearly every field in the form that has a corresponding table setup.

In fields for Patient, Insurance, Referring Provider, Rendering Provider, Facility, Billing Provider, Supplemental Information, Plan/Program Name, ICD Code, and Procedure Code.

if you use CTRL +D or Double Click, a drop down list with all the approved choices will appear. Simply select the appropriate one.

Name	Address	Address 2	City	State	Zip Code	Phone	Payor ID
Insurance 1	123 Street		Eustis	FL	32726		45678
Insurance 2	456 St		City	FL	45678	1231231231	8888888

- **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 CMS-1500 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 +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.

Patient Name	Date of Birth	Address	City	State	Zip Code	Insured Name	Date of Service	Notes	Create Date	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/1/2024		5/13/2024 11:15:12	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/1/2024		5/13/2024 11:17:08	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/6/2024		5/13/2024 11:25:29	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/6/2024	secondary test	5/13/2024 11:28:34	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	6/7/2024		5/17/2024 2:29:45	F Insurance
DAVIS, JOHN	7/12/1985	123 NO ADDRESS	ALBANY	CA	94706	DAVIS, JOHN	9/27/2024		5/31/2024 7:56:37	F PARTNER
Lester, Matt	5/15/2024	456 Ave	Eustis	FL	32489	Lester, Matt	9/1/2024		5/31/2024 7:59:33	F Insurance
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED	4/29/2024		5/31/2024 9:59:07	F KAISER B
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED	4/29/2024		6/25/2024 8:40:05	F KAISER B
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED	4/29/2024		6/25/2024 8:46:25	F KAISER B
DAVIS, JOHN	7/12/1985	123 NO ADDRESS	ALBANY	CA	94706		9/29/2024		9/27/2024 5:44:26	F PARTNER

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. The menu bar across the top of the page has icons for New, Copy, Edit, Print Delete, Scrub, and Archive, as well as your electronic batch options..
2. RIGHT click on an existing claim. You will see a Pop Up Menu. with similar options that you see at the top of your claim list when highlighting a claim.

The screenshot displays a user interface for managing claims. At the top, there is a form for a claimant named 'DAVIS, JOHN' with a birth date of 07/12/1985 and address 123 NO ADDRESS, ALBANY, CA 94706. Below this is a table of services:

Service	Created	Status	Amount	Paid	Insured	ID	Company	Provider	Referred
9/27/2024	5/31/2024 7:56:37 AM	SAVE			DAVIS, JOHN	0000915	PARTNERSHIP HP	Billing Provider	

At the bottom of the interface is a toolbar with the following buttons: New Copy, Edit, Delete, Archive, Restore, Print, ECH Batch, Sec. Claim, Scrub, and Envelope.

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.. One of the most frequently used is a date column, such as Create Date. Clicking on the Create Date column header will sort your claims by date. Clicking it again will reverse the order. This is particularly useful when batching, as it displays all recent claims together in the list, rather than jumping around in an alphabetically sorted format.

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



### [2.1.1.5 Quick Claims recreate](#)

Creating repeat visit claims is one of our users' favorite functions. Speedy Claims features allow you to quickly and easily create new claims for existing patients, without even needing to open the claim.

In your [Claims List](#), highlight the claim or claims you need to rebill. Clicking on your F7 function key will recreate the selected claims with the date of service one week later than the existing claim. Clicking on your F9 function key will recreate the claims with today's date of service.

In this example, I have 4 existing claims selected to rebill for patients who had visits today.

Claims List Need Help? 1-844-267-1500 Free Support!

Look For:  In: Patient Name   Show Previous: 12 Months  Include Inactive Claims

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Create Date	Insured Name	Date of Service	No
Alfred, Brown	2/2/2020	123 Street	Houston	TX	78787	3/6/2025 7:24:45 AM	Alfred, Brown	2/24/2025	
DAVIS, JOHN	3/3/2025	123 Key St	ALBANY	CA	94706	3/5/2025 2:08:08 PM	DA	3/5/2025	
DAVIS, JOHN	3/3/2025	123 Key St	ALBANY	CA	94706	3/4/2025 8:50:53 PM	DA	3/5/2025	
Barned, Jacob	3/2/2025	456 South St	George	GA	44778	3/4/2025 2:52:00 PM	Barned, Jacob	2/24/2025	
Barned, Jacob	3/2/2025	456 South St	George	GA	44778	3/4/2025 2:50:14 PM	Barned, Jacob	2/24/2025	
Lester, Matt	5/15/2024	456 Ave	Eustis	FL	32489	2/21/2025 12:07:53	Lester, Matt	2/3/2025	Ne

Using the F9 function key, NEW claims with today's date of service are created and saved in the list. They are also highlighted and ready for you to [print](#) or [create a batch](#) file for electronic submission

Claims List Need Help? 1-844-267-1500 Free Support!

Look For:  In: Patient Name   Show Previous: 12 Months  Include Inactive Claims

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Create Date	Insured Name	Date of Service	No
Lester, Matt	5/15/2024	456 Ave				3/19/2025 11:12:36	Lester, Matt	3/19/2025	
Barned, Jacob	3/2/2025	456 South				3/19/2025 11:12:36	Barned, Jacob	3/19/2025	
DAVIS, JOHN	3/3/2025	123 Key S				3/19/2025 11:12:36	DA	3/19/2025	
Alfred, Brown	2/2/2020	123 Street				3/19/2025 11:12:36	Alfred, Brown	3/19/2025	
Alfred, Brown	2/2/2020	123 Street				3/6/2025 7:24:45 AM	Alfred, Brown	2/24/2025	
DAVIS, JOHN	3/3/2025	123 Key S				3/5/2025 2:08:08 PM	DA	3/5/2025	
DAVIS, JOHN	3/3/2025	123 Key S				3/4/2025 8:50:53 PM	DA	3/5/2025	
Barned, Jacob	3/2/2025	456 South				3/4/2025 2:52:00 PM	Barned, Jacob	2/24/2025	
Barned, Jacob	3/2/2025	456 South				3/4/2025 2:50:14 PM	Barned, Jacob	2/24/2025	
Lester, Matt	5/15/2024	456 Ave				2/21/2025 12:07:53	Lester, Matt	2/3/2025	

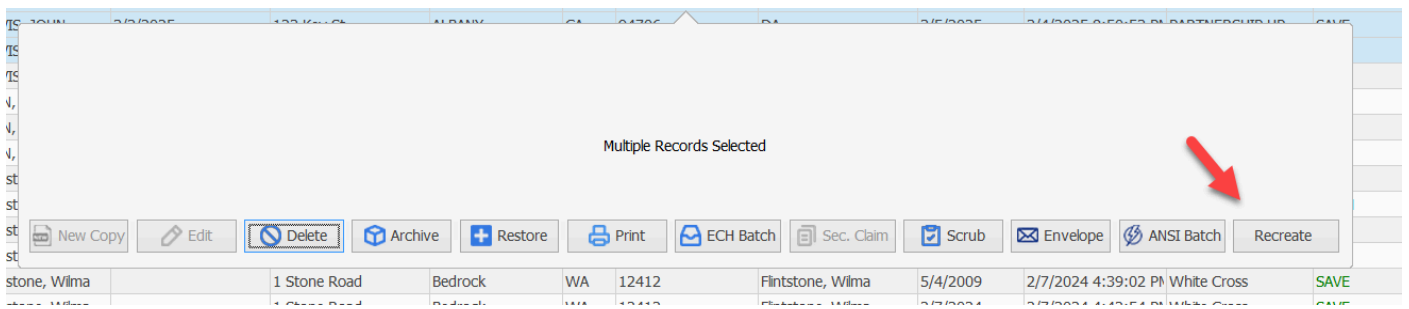
Status

Claim Copy

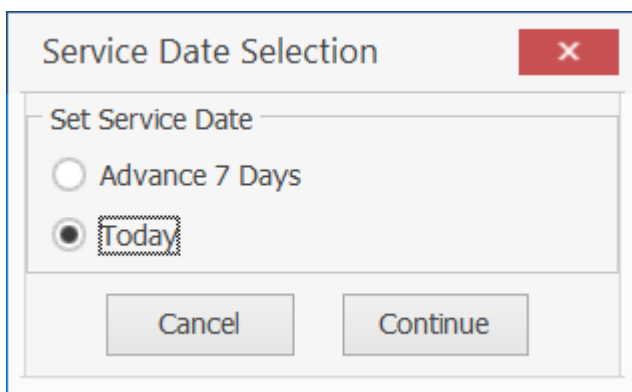
4 Claims

Completed

This same function can be done by highlighting the selected claims and RIGHT clicking with your mouse to show your popup window. Select Replicate.



A window will appear, allowing you to select whether to recreate the selected claim(s) with today's date of service or one week from the existing date of service.



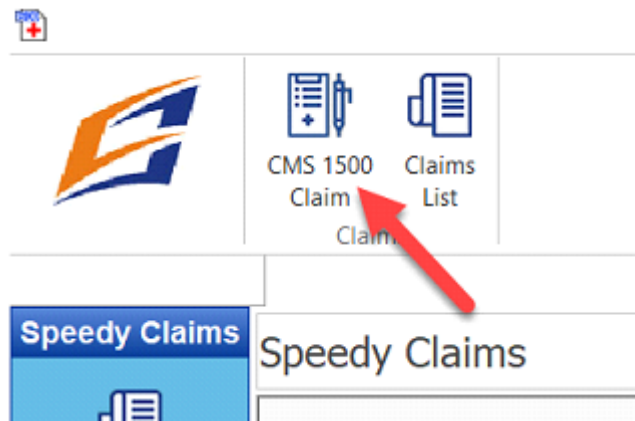
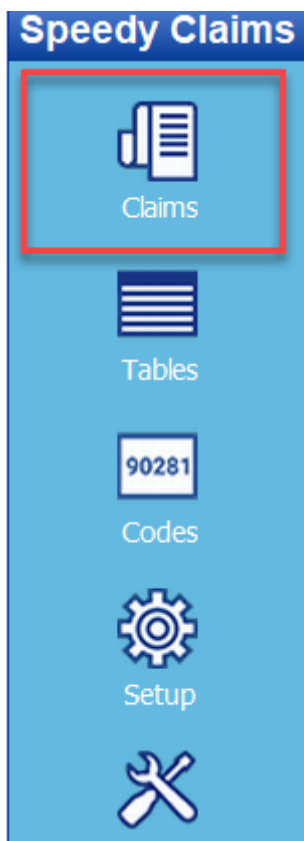
Perfect for many solo providers who do their own billing, creating claims for the patients you saw today can be done in seconds!

## 2.1.1.1 CMS 1500 Claim Form

Selecting **CMS 1500 Claim** 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. Additionally, we have added numerous features to make your claim entry even easier.

## 2.1.1.2 Creating Claims

Click on Claims from the top left vertical navigation field and select “CMS 1500 Claim” from the top. This will pull up a blank form that is ready to fill out.



If you have more than one [template](#) created, select the one you need from the drop-down in the upper left and click on Apply Template before beginning to fill out your claim.

Template: Template 2 Apply Template  Active Page 1 of 1  
 Mode: Edi Template 1  Paid + ADD PAGE  
 Status: Template 2  Use 4 Digit Service Year on Forms Make Secondary  
Template 3

Payor ID

**HEALTH INSURANCE CLAIM FORM**  
 APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

P/ICA

1. MEDICARE <input type="checkbox"/> (Medicare#)                    MEDICAID <input type="checkbox"/> (Medicaid#)                    TRICARE <input type="checkbox"/> (ID#/DoD#)                    CHAMPVA <input type="checkbox"/> (Member ID#)                    GROUP HEALTH PLAN <input type="checkbox"/> (ID#)                    FECA BLK LUNG <input type="checkbox"/> (ID#)                    OTHER <input type="checkbox"/> (ID#)	1a. INSURED'S I.D. NUMBER <input type="text"/>	
2. PATIENT'S NAME (Last Name, First Name, Middle Initial) <input type="text"/>	3. PATIENT'S BIRTH DATE MM   DD   YY    SEX M <input type="checkbox"/> F <input type="checkbox"/>	4. INSURED'S NAME (Last Name, First Name) <input type="text"/>
5. PATIENT'S ADDRESS (No., Street) <input type="text"/>	6. PATIENT RELATIONSHIP TO INSURED Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other <input type="checkbox"/>	7. INSURED'S ADDRESS (No., Street) <input type="text"/>
CITY <input type="text"/> STATE <input type="text"/>	8. RESERVED FOR NUCC USE	CITY <input type="text"/>
ZIP CODE <input type="text"/> TELEPHONE (Include Area Code) <input type="text"/>	9. OTHER INSURED'S NAME (Last Name, First Name, Middle Initial) <input type="text"/>	10. IS PATIENT'S CONDITION RELATED TO: a. EMPLOYMENT? (Current or Previous) <input type="checkbox"/> YES <input type="checkbox"/> NO b. AUTO ACCIDENT? <input type="checkbox"/> YES <input type="checkbox"/> NO    PLACE (State) <input type="text"/> c. OTHER ACCIDENT? <input type="checkbox"/> YES <input type="checkbox"/> NO
a. OTHER INSURED'S POLICY OR GROUP NUMBER <input type="text"/>	11. INSURED'S POLICY GROUP OR FECA <input type="text"/>	a. INSURED'S DATE OF BIRTH MM   DD   YY <input type="text"/>
b. RESERVED FOR NUCC USE <input type="text"/>	b. OTHER CLAIM ID (Designated by NUCC) <input type="text"/>	c. INSURANCE PLAN NAME OR PROGRAM <input type="text"/>
c. RESERVED FOR NUCC USE <input type="text"/>	10d. CLAIM CODES (Designated by NUCC) <input type="text"/>	d. IS THERE ANOTHER HEALTH BENEFIT <input type="checkbox"/> YES <input type="checkbox"/> NO
d. INSURANCE PLAN NAME OR PROGRAM NAME <input type="text"/>		

## **AUTOFILL FUNCTIONS**

If you are creating a new claim and you start typing the Patient name in Field 2, the autofill will open, showing you a list that narrows down the more you type. When you see the patient's name, you can select it, and the patient's data will populate the form. “If preferred, a double lick in any of the fields below will pull up its corresponding Table to select your needed entry”.

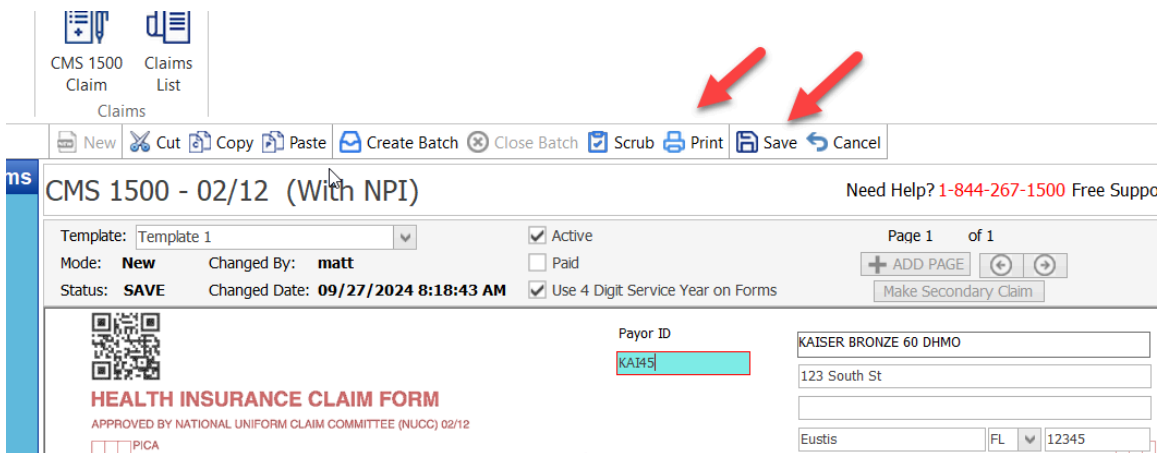
You can do this in many areas of the claim form including:

- # Patient Name – Field 2
- # Insurance Company – Carrier Fields
- # Referring Provider – Field 17
- # Diagnosis Codes – Field 21 \*\*
- # Place of Service Codes – Field 24b
- # Procedure Codes – Field 24d \*\*

- # Service Facility – Field 32
- # Billing Provider – Field 33
- # All places where a date is required (Drop down)

\*\* [Diagnosis](#) and [Procedure](#) codes are entered into their correct Table Fields by selecting “[CODES](#)” on your left navigation bar. Select either Diagnosis or Procedure from above. Click on “NEW” in the upper left, fill in the appropriate code and details then save from your “save” button above and repeat to build your custom code libraries!

You can use your mouse to select the appropriate fields and your keyboard to enter the data or you can use your Tab key to move among the fields. Either method you use, simply fill in all the appropriate fields and click either the Save icon or the Print icon. Printing will save the claim to the Claim List automatically.



If you choose Print, the form will be printed according to your selection from the Settings Menu, and it will be saved to the Claims List. If you choose Save, the claim will be saved to the Claims List for later action. After the claim is saved, click on the “NEW” icon to start a new claim.

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](#)

## SECONDARY CLAIMS

Fill out the primary claim as usual. If there is a Secondary insurance check 11d there is another Health Benefit Plan. Fill out 9, 9a, and 9d as instructed in 11d.

From the claim list, highlight the claim. An option for a Secondary Claim will be highlighted and available for selection. Right-clicking on the claim will provide the same options as those highlighted in the upper bar.

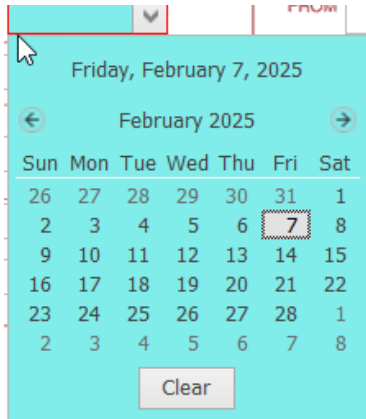
The screenshot shows a software interface with a 'Claims List' table. The table has columns for Patient Name, Date of Birth, Address, City, State, and Zip Code. The first row is highlighted, and a context menu is open over it, showing the option 'Create Secondary Claim (Ctrl+L)'. A red arrow points to the 'Sec. Claim' button in the top toolbar.

Patient Name	Date of Birth	Address	City	State	Zip Code
DAVIS, JOHN	07/12/1985	123 NO ADDRESS	ALBANY	CA	94706
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070
Lester, Matt	05/01/2024	123 St	Eustis	FL	32726
Lester, Matt	05/15/2024	456 Ave	Eustis	FL	32489

This will pull the claim up as a New Secondary Claim. The information from section 1 and 9 have been reversed. All that is needed now is to change the insurance name and address to the secondary insurance. In some cases, they may want the amount paid from the primary insurance entered on the secondary claim in field 29.

### 2.1.1.3 Keyboard Shortcuts

In the date fields, you can manually enter the date in a mm/dd/yyyy format. The drop-down arrow will show you an interactive calendar with the current date selected.



Click on the left or right arrows, or scroll to quickly change the month. Click on the desired date to insert the date into the field in the proper format.

**CTRL +D** is a powerful shortcut. You can use it in nearly every field in the form that has a corresponding table setup.

In fields for Patient, Insurance, Referring Provider, Rendering Provider, Facility, Billing Provider, Supplemental Information, Plan/Program Name, ICD Code, and Procedure Code.

if you use CTRL +D or Double Click, a drop down list with all the approved choices will appear. Simply select the appropriate one.



**CTRL +N** - Creates a new blank record appropriate to your current location. If you are in the Claims List or Form Entry, then CTRL +N will produce a new, empty CMS-1500 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 +C** - Copy can be used to copy data from one field to paste to another.
- **CTRL +V** - Paste
- **CTRL +X** - Cut without copying
- **CTRL +Z** - undoes the most recent action you performed on your computer

undoes the most recent action you performed on your computerundoes the most recent action you performed on your computer

## 2.1.1.4 Claims List

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

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.. One of the most frequently used is a date column, such as Create Date. Clicking on the Create Date column header will sort your claims by date. Clicking it again will reverse the order. This is very useful when batching as it will show all recent claims done together in the list rather than jumping around the list in an alphabetic sorted format..

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 highlighting 1 claim first, then 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, ANSI Batch, etc

The screenshot shows the 'Claims List' interface. At the top is a toolbar with icons for: New Copy, Edit, Sec. Claim, Cut, Copy, Paste, ECH Batch, ANSI Batch, Close Batch, Scrub, Print, Delete, Archive, Restore, Export, and Save. Below the toolbar is the title 'Claims List' and a link 'Need Help? 1-844-267-1500 Free Support!'. There is a search bar with 'Look For:' and a dropdown menu set to 'In: Patient Name'. To the right are buttons for 'Find Now', 'Clear', and 'Show Previous: 12 Months', along with a checkbox for 'Include Inactive Claims'. Below this is a table with columns: Patient Name, Date of Birth, Address, City, State, Zip Code, Insured Name, Date of Service, Notes, Create Date, and Insurance. The first row is highlighted in blue.

Patient Name	Date of Birth	Address	City	State	Zip Code	Insured Name	Date of Service	Notes	Create Date	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/1/2024		5/13/2024 11:15:12	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/1/2024		5/13/2024 11:17:08	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/6/2024		5/13/2024 11:25:29	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	5/6/2024	secondary test	5/13/2024 11:28:34	Insurance
Lester, Matt	5/1/2024	123 St	Eustis	FL	32726	Lester, Matt	6/7/2024		5/17/2024 2:29:45	Insurance
DAVIS, JOHN	7/12/1985	123 NO ADDRESS	ALBANY	CA	94706	DAVIS, JOHN	9/27/2024		5/31/2024 7:56:37	PARTNER
Lester, Matt	5/15/2024	456 Ave	Eustis	FL	32489	Lester, Matt	9/1/2024		5/31/2024 7:59:33	Insurance
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED	4/29/2024		5/31/2024 9:59:07	KAISER B
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED	4/29/2024		6/25/2024 8:40:05	KAISER B
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED	4/29/2024		6/25/2024 8:46:25	KAISER B
DAVIS, JOHN	7/12/1985	123 NO ADDRESS	ALBANY	CA	94706		9/29/2024		9/27/2024 5:44:26	PARTNER

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. The menu bar across the top of the page has icons for New, Copy, Edit, Print Delete, Scrub, Archive, as well as your electronic batch options.
2. RIGHT click on an existing claim. You will see a Pop Up Menu. with similar options you see at the top of your claim list when highlighting a claim.

DAVIS, JOHN 07/12/1985 Notes  
 123 NO ADDRESS  
 ALBANY CA 94706

Service	Created	Status	Amount	Paid	Insured	ID	Company	Provider	Referred
9/27/2024	5/31/2024 7:56:37 AM	SAVE			DAVIS, JOHN	0000915	PARTNERSHIP HP	Billing Provider	

The menu bar at the top as well as the popup on a right click, show the following options for selected claim(s)

**New Copy** - Opens your claim in New Copy mode for creating a new claim starting with all data from the existing selected claim

**Edit** - Opens your claim in Edit Mode for adding or correcting information to the existing selected claim

**Delete** - Deleted selected highlighted claim(s)

**Archive** - This option allows you to archive selected claims, making them inactive. They will not show in your claim list when archived; however, they are not deleted. To display archived claims, select 'Include Inactive Claims' at the top of your claim list..

## Claims List

Need Help? [1-844-267-1500](tel:1-844-267-1500) Free Support!

Look For:  In: Patient Name   Show Previous: 12 Months  Include Inactive Claims

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Insured Name	Date of Service	Notes
▶ Lester, Matt	5/15/2024	456 Ave	Eustis	FL	32489	Lester, Matt	3/19/2025	Needs
Barned, Jacob	3/2/2025	456 South St	George	GA	44778	Barned, Jacob	3/19/2025	
DAVIS, JOHN	3/3/2025	123 Key St	ALBANY	CA	94706	DA	3/19/2025	
Alfred, Brown	2/2/2020	123 Street	Houston	TX	78787	Alfred, Brown	3/19/2025	
Alfred, Brown	2/2/2020	123 Street	Houston	TX	78787	Alfred, Brown	2/24/2025	

**Restore** - This option is used to reactivate archived claims. Once you include inactive claims they will show up in dark gray. You can highlight desired claim(s) and select Restore to reactivate them back into your list.

**Print** - Prints selected claim(s)

**ECH Batch** - This option is used for [batching](#) your selected claim(s) for electronic submission in a "Print Image" format

**Sec. Claim** - This option will open your existing claim as a Secondary Claim, reversing the data in 1a and section 9. This function is only available if 11d is checked Yes.

11. INSURED'S POLICY GROUP OR FECA NUMBER

a. INSURED'S DATE OF BIRTH  
MM | DD | YY      SEX  
7/12/1985      M       F

b. OTHER CLAIM ID (Designated by NUCC)

c. INSURANCE PLAN NAME OR PROGRAM NAME

d. IS THERE ANOTHER HEALTH BENEFIT PLAN?  
 YES     NO    *If yes, complete items 9, 9a, and 9d.*

**Scrub** - This option will do a scrub check on your selected claim(s) for standard missing fields. It is very similar to the auto-scrubbing done when creating an [ANSI Batch](#), with the exception of a few fields being more strict regarding format layout in an ANSI context. It will inform you of fields needing information and allow you to correct while in the scrub window as well as updating the claim(s)

Scrub List

Look For:      In: Date Of Service      Find Now    Clear    Rescrub      Reset Grid

Patient Name

Date Of Service	Patient Name	Amount	Field	Description
▶ Patient Name : Barned, Jacob				
▲ Patient Name : Lester, Matt				
3/19/2025	Lester, Matt	\$100	01a	The Insured ID Number is missing or incorrect. Do not include hyphens or space
3/19/2025	Lester, Matt	\$100	12	Signature on File is missing or incorrect. (Signature on File Missing) (Date Missing)
3/19/2025	Lester, Matt	\$100	13	Signature on File is missing or incorrect.
3/19/2025	Lester, Matt	\$100	21	At least one Diagnosis Code is required.
3/19/2025	Lester, Matt	\$100	24 (1B)	There is missing information in Line 01. (Place of Service Missing)

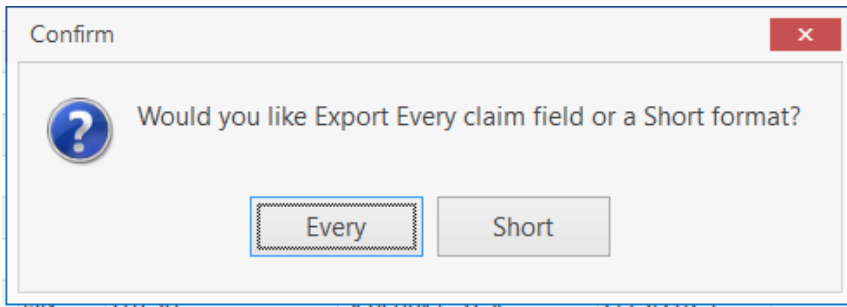
There is missing information in Line 01. (Place of Service Missing)

24. A.	B.	C.	D.	E.	F.	G.	H.	I.	J.
DATE(S) OF SERVICE	PLACE OF SERVICE	EMG	PROCEDURES, SERVICES, OR SUPPLIES	DIAGNOSIS	\$ CHARGES	DAYS OR UNITS	SPRDT Family Plan	ID. QUAL.	RENDERING PROVIDER ID. #
From MM DD YY	To MM DD YY		(Explain Unusual Circumstances) CPT/HCPCS   MODIFIER	POINTER					
3/19/2025			45454	A	\$100.00	1		NPI	4564546456

**Envelope** - This option will allow you to print the insurance and billing provider address for the highlighted claim(s) for mailing paper claims.

**ANSI Batch** - This option is for [batching](#) your selected claim(s) for electronic submission in an ANSI 837 format

**Export** - This option allows you to export your claim list. You will have an option to export every claim field or short format.



Every claim field will export all data from the entire claim(s) selected. The short format will export the fields showing in the claim list

## 2.1.1.5 Repeat Claims in Seconds Shortcut

Creating repeat visit claims is one of our users' favorite functions. Speedy Claims has features that allow you to create new claims for existing patients fast and easy, without having to even open the claim!

In your [Claims List](#), highlight the claim or claims you need to rebill. Clicking on your F7 function key will recreate the selected claims with the date of service one week later than the existing claim. Clicking on your F9 function key will recreate the claims with today's date of service.

In this example, I have 4 existing claims selected to rebill for patients who had visits today.

Claims List Need Help? [1-844-267-1500](tel:1-844-267-1500) Free Support!

Look For:  In: Patient Name  Clear Show Previous: 12 Months  Include Inactive Claims

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Create Date	Insured Name	Date of Service	No
Alfred, Brown	2/2/2020	123 Street	Houston	TX	78787	3/6/2025 7:24:45 AM	Alfred, Brown	2/24/2025	
DAVIS, JOHN	3/3/2025	123 Key St	ALBANY	CA	94706	3/5/2025 2:08:08 PM	DA	3/5/2025	
DAVIS, JOHN	3/3/2025	123 Key St	ALBANY	CA	94706	3/4/2025 8:50:53 PM	DA	3/5/2025	
Barned, Jacob	3/2/2025	456 South St	George	GA	44778	3/4/2025 2:52:00 PM	Barned, Jacob	2/24/2025	
Barned, Jacob	3/2/2025	456 South St	George	GA	44778	3/4/2025 2:50:14 PM	Barned, Jacob	2/24/2025	
Lester, Matt	5/15/2024	456 Ave	Eustis	FL	32489	2/21/2025 12:07:53	Lester, Matt	2/3/2025	Ne

Using the F9 function key, NEW claims with today's date of service are created and saved in the list. They are also highlighted and ready for you to [print](#) or [create a batch](#) file for electronic submission

Claims List Need Help? [1-844-267-1500](tel:1-844-267-1500) Free Support!

Look For:  In: Patient Name  Clear Show Previous: 12 Months  Include Inactive Claims

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Create Date	Insured Name	Date of Service	No
Lester, Matt	5/15/2024	456 Ave				3/19/2025 11:12:36	Lester, Matt	3/19/2025	
Barned, Jacob	3/2/2025	456 South				3/19/2025 11:12:36	Barned, Jacob	3/19/2025	
DAVIS, JOHN	3/3/2025	123 Key S				3/19/2025 11:12:36	DA	3/19/2025	
Alfred, Brown	2/2/2020	123 Street				3/19/2025 11:12:36	Alfred, Brown	3/19/2025	
Alfred, Brown	2/2/2020	123 Street				3/6/2025 7:24:45 AM	Alfred, Brown	2/24/2025	
DAVIS, JOHN	3/3/2025	123 Key S				3/5/2025 2:08:08 PM	DA	3/5/2025	
DAVIS, JOHN	3/3/2025	123 Key S				3/4/2025 8:50:53 PM	DA	3/5/2025	
Barned, Jacob	3/2/2025	456 South				3/4/2025 2:52:00 PM	Barned, Jacob	2/24/2025	
Barned, Jacob	3/2/2025	456 South				3/4/2025 2:50:14 PM	Barned, Jacob	2/24/2025	
Lester, Matt	5/15/2024	456 Ave				2/21/2025 12:07:53	Lester, Matt	2/3/2025	

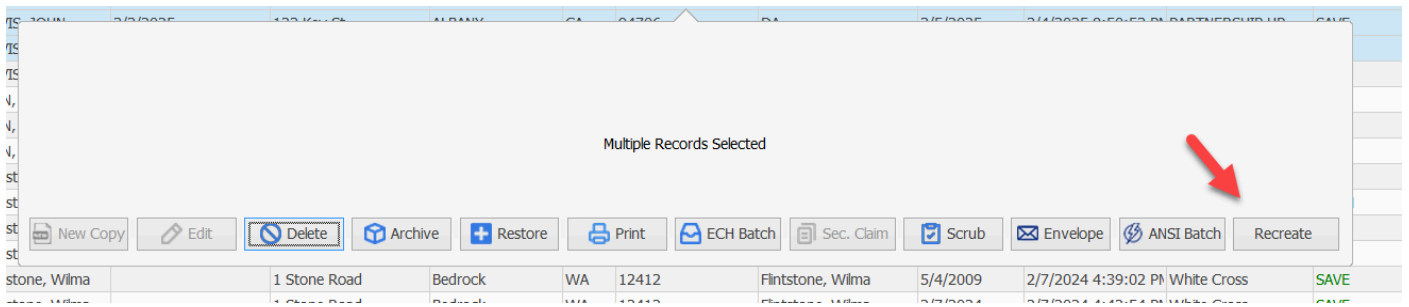
Status

Claim Copy

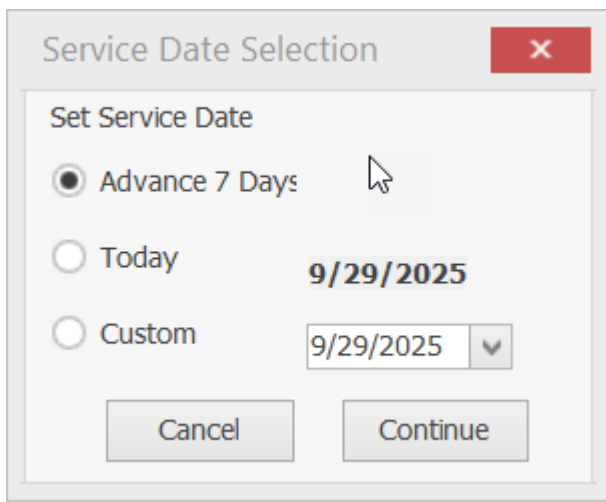
4 Claims

Completed

This same function can be done by highlighting the selected claims and RIGHT clicking with your mouse to show your popup window. Select **Recreate**.

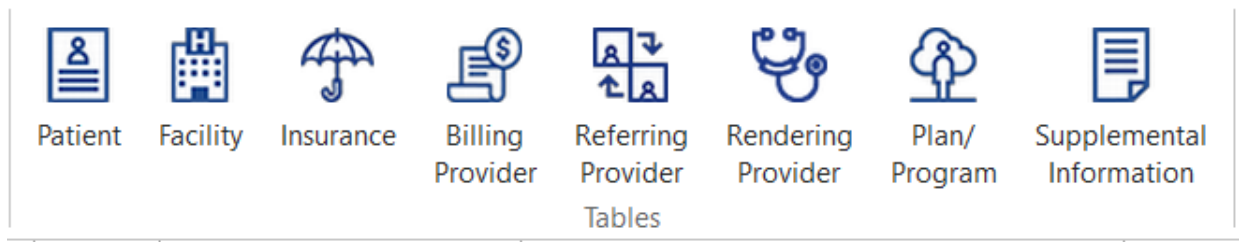


A window will appear, allowing you to select whether to recreate the selected claim(s) with today's date of service or one week from the existing date of service. There is a Custom Option as well to enter any date you require.



Perfect for many solo providers who do their own billing, creating claims for the patients you saw today can be done in seconds!

## 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.

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

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

[Billing Provider Table](#) - contains data specific to billing providers.

[Referring Provider Table](#) - Contains data specific to referring providers

[Plan/Program Table](#) - Contains data specific to Plan/Program use

[Supplemental Information Table](#) - Contains data specific to your supplemental information use

The following are types of supplemental information that can be entered in the shaded areas of Item Number 24: • Narrative description of unspecified codes • National Drug Codes (NDC) for drugs • Contract rate • Tooth numbers and areas of the oral cavity

The following qualifiers are to be used when reporting these services. ZZ Narrative description of unspecified code N4 National Drug Codes (NDC) CTR Contract rate JP Universal/National Tooth Designation System JO ANSI/ADA/ISO Specification No. 3950-1984 Dentistry Designation System for Tooth and Areas of the Oral Cavity For additional information for reporting NDC units, see the National Uniform Claim Committee's website at [www.nucc.org](http://www.nucc.org).

### 2.1.2.1 Patient Table

You can Add, Edit, Delete and Export patient data from this screen. Data from this screen can be used to fill in fields 1, 1a, 2, 3, 4, 5, 6, 7, 9, and 11 on the claim form.

## Patient List Need Help

Look For: 
 In: Name 
 Find Now 
 Include Inactive Patients

Drag a column header here to group by that column

Name	Address	City
Barker, Jihn		
Cole, Susan	50 PARK DR	ALBANY
DAVIS, JOHN	123 NO ADDRESS	ALBANY
▶ DON, FRED	50 PARK DR	ALBANY
Franklin, Miles	147 Side St	Columbo
Lester, Matt	456 Ave	Eustis
Matt Lester		
Supplement		

---

(Last Name, First Name, Middle Initial)

Name: 
 Phone #:

Address: 
 Cell #:

City: 
 State:  
 Fax #:

Zip Code: 
 Birth Date:

Email: 
 Sex:

Account # (Box):

- Add Patient - To add a new patient, simply click the New icon, fill in the relevant data below, and click Save.
- Edit Patient - To edit the patient data, select the patient from the list, change the data below, 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.

Export Grid ✕

Export Format

Microsoft Excel (xls)  
 Microsoft Excel (xlsx)  
 HTML  
 Comma delimited  
 Tab delimited  
 Text  
 XML

**2.1.2.2 Facility Table**

You can Add, Edit, Delete, and Export the Service Facility data from this screen. Data from this screen fills Field 32 on the form.

**32. SERVICE FACILITY LOCATION INFORMATION**

**Facility List** Need

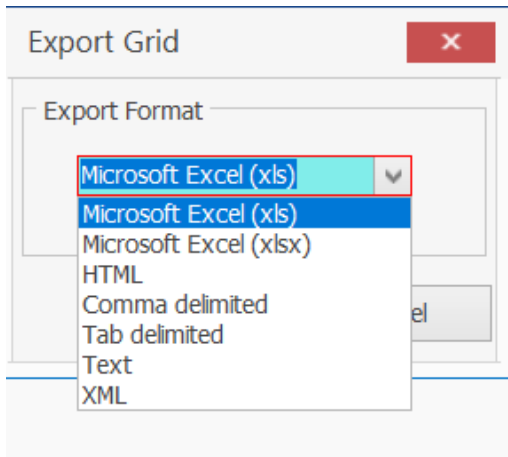
Look For:  In:

Drag a column header here to group by that column

Name	Address	City
Facility	123 St	City
Mercy General	7587 Morningside	Polling

Name:  Phone #:   
 Address:  Fax #:   
 City:  State:  NPI Number:   
 Zip Code:  Other ID #:   
 Email:   
 Notes:

- 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 and address at the top right of the claim. The Payor ID will be required for electronic submission.

Payor ID	<input type="text" value="KAISER BRONZE 60 DHMO"/>	CARRIER	
<input type="text"/>	<input type="text" value="123 St"/>		
	<input type="text"/>		
	<input type="text" value="City"/> <input type="text" value="FL"/> <input type="text" value="12345"/>		
FECA BUK LUNG	OTHER	1a. INSURED'S I.D. NUMBER	(For Program in Item 1)

## Insurance List

Look For:  In: Name

Drag a column header here to group by that column

Name	Payor ID	Address
Insurance 1	45678	123 Street
Insurance 2	888888	456 St
KAISER BRONZE 60 DHMO		123 St
PARTNERSHIP HP		4546 St

---

Name  Phone #

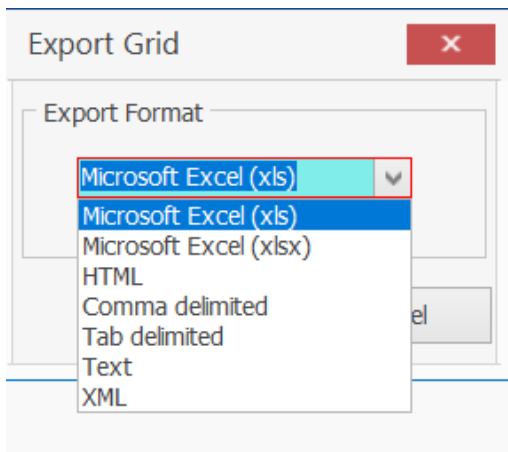
Address 1  Fax #

Address 2

City  State  Email

Zip Code

- 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 Billing Provider Table**

You can Add, Edit, Delete, and Export Billing Provider data from this screen. Data from this screen fills field 33 on the claim form.

33. BILLING PROVIDER INFO & PH # ( (123)123-2132

**Billing Provider**

123 St

City FL 12345

a. 123123112 b. TX67676757575

New Cut Copy Paste Delete Export Save Cancel

### Billing Provider List Need

Look For:  In: Name Find Now Clear

Drag a column header here to group by that column

Name	Address	City
Billing Provider	123 St	City
Billing Provider	123 St	City

---

Name:  Phone #:

Address:  Fax #:

City:  State:

Zip Code:  NPI Number:

Email:  Other ID #:

Tax Number:  Misc Entry:

Tax ID Type:

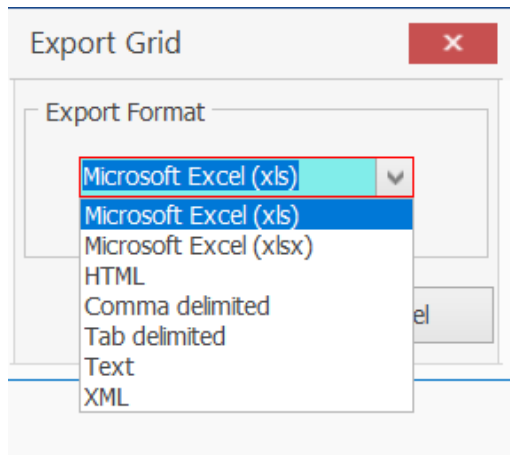
Notes:

Do you receive checks at a PO Box?

If you have different Other 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.

- Add Provider - To add a new Provide,r 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.



•

### 2.1.2.5 Referring Provider Table

You can Add, Edit, Delete, and Export Referring Provider data from this screen. Data from this screen fills field 17 on the claim form

17. NAME OF REFERRING PROVIDER OR OTHER SOURCE		17a.	
DR	Example Referring	ZZ	78899554441
		17b. NPI	1234567894

19. ADDITIONAL CLAIM INFORMATION (Designated by NUCC)

New Cut Copy Paste Delete Export Save Cancel

## Referring Provider List Need

Look For:  In: Name

Drag a column header here to group by that column

Name	Address	City
▶ Example Referring	645 SW First Ave	Clover

---

Name:  Fax #:

Address:  NPI Number:

City:  State:  Non NPI Qualifier:

Zip Code:  Non NPI ID:

Email:

Phone #:  Provider Qualifier:

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

Export Grid ✕

Export Format

- Microsoft Excel (xls)
- Microsoft Excel (xls)
- Microsoft Excel (xlsx)
- HTML
- Comma delimited
- Tab delimited
- Text
- XML

### 2.1.2.6 Rendering Provider Table

You can Add, Edit, Delete, and Export Rendering Provider data from this screen. Data from this screen fills fields 24 I, and J on the claim form

I. ID. QUAL.	J. RENDERING PROVIDER ID. #
ZZ	363LP0808X
NPI	456465465

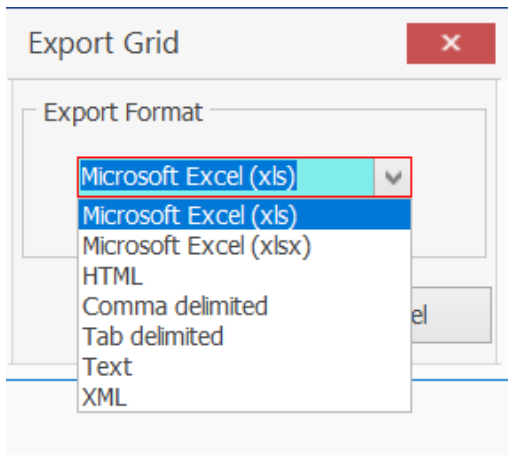
### Rendering Provider List

Look For: <input type="text"/>	In: Name	Find Now	Clear
Drag a column header here to group by that column			
Name	NPI Number	Non NPI C	NonNPIID
▶ Rendering Provider	456465465	ZZ	363LP0808X

Name	<input type="text" value="Rendering Provider"/>	NPI Number	<input type="text" value="456465465"/>
Phone #	<input type="text" value="(456)465-4565"/>	Non NPI Qualifier	<input type="text" value="ZZ"/>
Fax #	<input type="text" value="( ) -"/>	Non NPI ID	<input type="text" value="363LP0808X"/>
Email	<input type="text"/>		
Notes	<input type="text"/>		

- Add Rendering Provider - To add a new Rendering Provider, simply click the New icon, fill in the relevant data, and click Save.

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



### 2.1.2.7 Plan / Program Table

You can Add, Edit, Delete, and Export Plan / Program data from this screen. Data from this screen fills field 17C on the claim form

11. INSURED'S POLICY GROUP OR FECA NUMBER	PATIENT AND INSURED INFO
a. INSURED'S DATE OF BIRTH MM   DD   YY	
SEX M <input type="checkbox"/> F <input type="checkbox"/>	
b. OTHER CLAIM ID (Designated by NUCC)	
c. INSURANCE PLAN NAME OR PROGRAM NAME Kaiser Bronze	
d. IS THERE ANOTHER HEALTH BENEFIT PLAN?	

The "Insurance Plan Name or Program Name" is the name of the plan or program of the insured as indicated in Item Number 1a



## Plan/Program List

Look For:  In: Name  Find Now Clear

Drag a column header here to group by that column

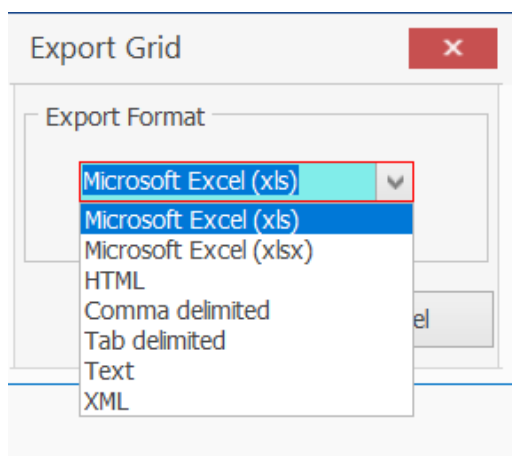
Name	Misc
▶ Kaiser Bronze	

Name:

Misc:

Notes:

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



### [2.1.2.8 Supplemental Information Table](#)

You can Add, Edit, Delete, and Export Plan / Program data from this screen. Data from this screen fills the shaded portion on field 24 on the claim form

24. A.	DATE(S) OF SERVICE						B. PLACE OF SERVICE	C. EMG	D. PROCEDURES, SERVICES, OR SUP		
	From	To			(Explain Unusual Circumstances)						
MM	DD	YY	MM	DD	YY			CPT/HCPCS		MODIFIER	
N460505083404 UN1											

The following are types of supplemental information that can be entered in the shaded areas of Item Number 24:

- Narrative description of unspecified codes
- National Drug Codes (NDC) for drugs
- Contract rate
- Tooth numbers and areas of the oral cavity

New Cut Copy Paste Delete Export Save Cancel

### Supplemental Information Need Help?

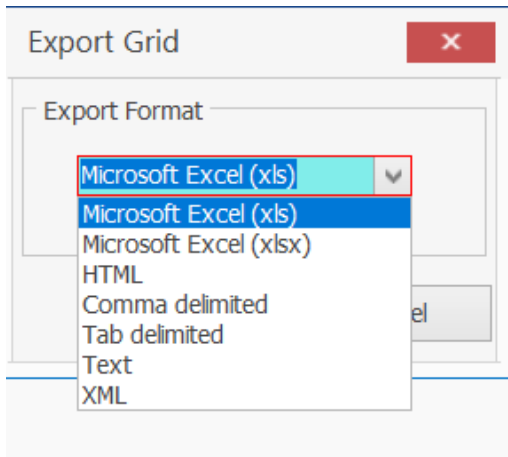
Look For:  In: Description Find Now Clear

Drag a column header here to group by that column

Description
▶ N400024584101 ML16
N460505083404 UN1

Description	N400024584101 ML16
Notes	Ziv-Alfibercept ZALTRAP 400 MG. Zaltrap is available as 200 MG per 8 ML (25 MG per ML) solution, single-use vial, NDC 000245841-01.

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



## 2.1.2.1 Patient Table

You can Add, Edit, Delete and Export patient data from this screen. Data from this screen can be used to fill in fields 1, 1a, 2, 3, 4, 5, 6, 7, 9, and 11 on the claim form.

**Patient List** Need Help?

Look For:  In: Name ▼ Find Now Clear  Include Inactive Patients

Drag a column header here to group by that column

Name	Address	City
Barker, Jihn		
Cole, Susan	50 PARK DR	ALBANY
DAVIS, JOHN	123 NO ADDRESS	ALBANY
▶ DON, FRED	50 PARK DR	ALBANY
Franklin, Miles	147 Side St	Columbo
Lester, Matt	456 Ave	Eustis
Matt Lester		
Supplement		

---

**Patient** Insured Notes

(Last Name, First Name, Middle Initial)

Name  Phone #

Address  Cell #

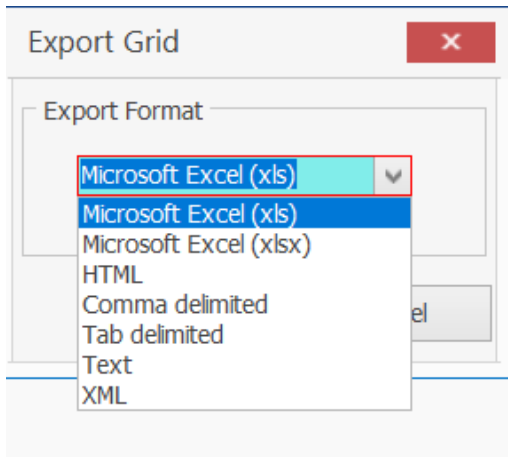
City  State  Fax #

Zip Code  Birth Date

Email  Sex

Account # (Box)

- Add Patient - To add a new patient, simply click the New icon, fill in the relevant data below, and click Save.
- Edit Patient - To edit the patient data, select the patient from the list, change the data below, 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 Facility Table

You can Add, Edit, Delete, and Export the Service Facility data from this screen. Data from this screen fills Field 32 on the form.

32. SERVICE FACILITY LOCATION INFORMATION

Mercy General		
7587 Morningside		
Polling	MA	69875
a. 9586254235	b.	

New Cut Copy Paste Delete Export Save Cancel

### Facility List

Look For:  In: Name Find Now Clear

Drag a column header here to group by that column

Name	Address	City
Facility	123 St	City
Mercy General	7587 Morningside	Polling

Name:  Phone #:

Address:  Fax #:

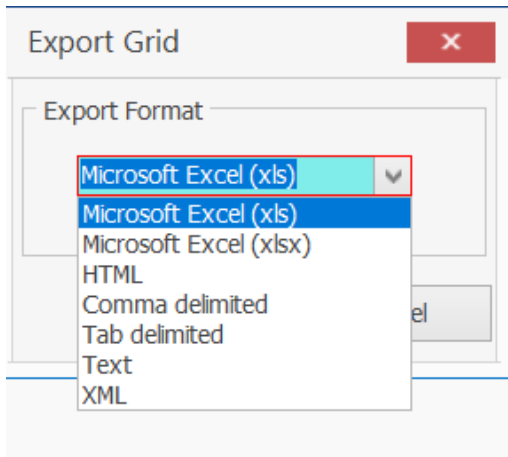
City:  State:  NPI Number:

Zip Code:  Other ID #:

Email:

Notes:

- 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 and address at the top right of the claim. The Payor ID will be required for electronic submission.

Payor ID

FECA BUK LUNG OTHER 1a. INSURED'S I.D. NUMBER (For Program in Item 1)

CARRIER

### Insurance List

Look For:  In:  Find Now Clear

Drag a column header here to group by that column

Name	Payor ID	Address
Insurance 1	45678	123 Street
Insurance 2	888888	456 St
KAISER BRONZE 60 DHMO		123 St
PARTNERSHIP HP		4546 St

---

Name  Phone #

Address 1  Fax #

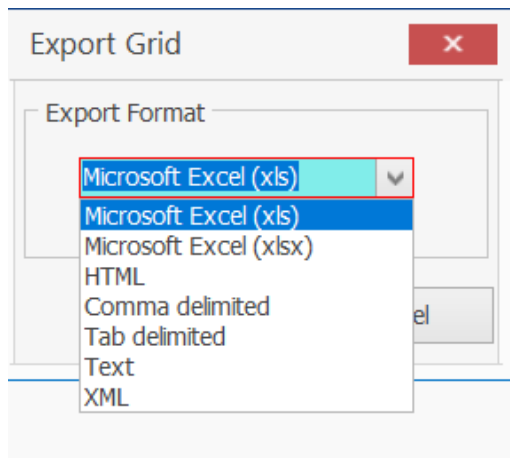
Address 2

City  State  Email

Zip Code

- 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 Billing Provider Table

You can Add, Edit, Delete, and Export Billing Provider data from this screen. Data from this screen fills field 33 on the claim form.

33. BILLING PROVIDER INFO & PH # ( (123)123-2132

**Billing Provider**

123 St

City FL 12345

a. 123123112 b. TX67676757575

APPROVED OMB 0028-1107 FORM 1500 (02-10)

New Cut Copy Paste Delete Export Save Cancel

### Billing Provider List Need

Look For:  In: Name Find Now Clear

Drag a column header here to group by that column

Name	Address	City
Billing Provider	123 St	City
Billing Provider	123 St	City

---

Name:  Phone #:

Address:  Fax #:

City:  State:  NPI Number:

Zip Code:  Other ID #:

Email:  Misc Entry:

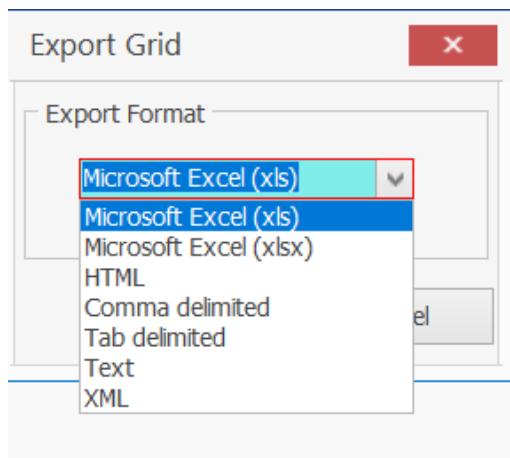
Tax Number:  Tax ID Type:

Notes:

Do you receive checks at a PO Box?

If you have different Other 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.

- Add Provider - To add a new Provide,r 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.



## 2.1.2.5 Referring Provider Table

You can Add, Edit, Delete, and Export Referring Provider data from this screen. Data from this screen fills field 17 on the claim form

17. NAME OF REFERRING PROVIDER OR OTHER SOURCE		17a.	ZZ	78899554441
DR	Example Referring	17b.	NPI	1234567894

19. ADDITIONAL CLAIM INFORMATION (Designated by NUCC)

New Cut Copy Paste Delete Export Save Cancel

### Referring Provider List

Look For:  In: Name Find Now Clear

Drag a column header here to group by that column

Name	Address	City
Example Referring	645 SW First Ave	Clover

Name:  Fax #:

Address:  NPI Number:

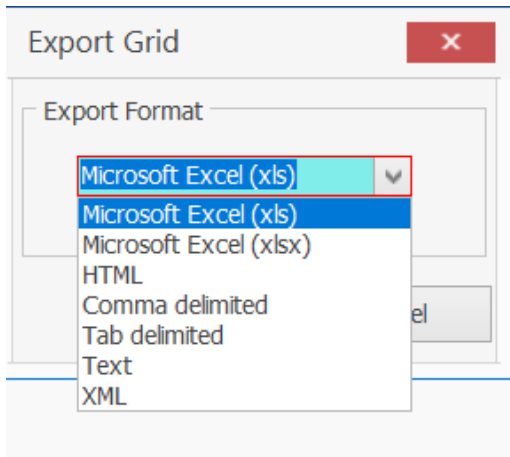
City:  State:

Zip Code:  Non NPI Qualifier:

Email:  Non NPI ID:

Phone #:  Provider Qualifier:

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



## 2.1.2.6 Rendering Provider Table

You can Add, Edit, Delete, and Export Rendering Provider data from this screen. Data from this screen fills fields 24 I, and J on the claim form

I. ID. QUAL.	J. RENDERING PROVIDER ID. #
ZZ	363LP0808X
NPI	456465465

### Rendering Provider List

Look For:  In:

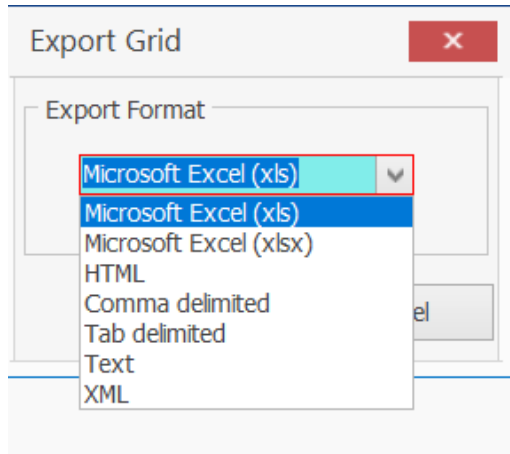
Drag a column header here to group by that column

Name	NPI Number	Non NPI	NonNPIID
▶ Rendering Provider	456465465	ZZ	363LP0808X

Name	<input type="text" value="Rendering Provider"/>	NPI Number	<input type="text" value="456465465"/>
Phone #	<input type="text" value="(456)465-4565"/>	Non NPI Qualifier	<input type="text" value="ZZ"/>
Fax #	<input type="text" value="( ) - -"/>	Non NPI ID	<input type="text" value="363LP0808X"/>
Email	<input type="text"/>		
Notes	<input type="text"/>		

- Add Rendering Provider - To add a new Rendering Provider, simply click the New icon, fill in the relevant data, and click Save.
- Edit Rendering Provider - To edit the Rendering Provider data, select the Provider from the list, change the data, and click Save.

- Delete Rendering Provider - To delete a Rendering Provider from the system, select the Provider from the list and click the delete icon.
- Export Rendering Provider Data - You can export the Rendering Provider list for use in another program if you wish. Simply click on the export icon and select the format you want to use.



## 2.1.2.7 Plan / Program Table

You can Add, Edit, Delete, and Export Plan / Program data from this screen. Data from this screen fills field 17C on the claim form

11. INSURED'S POLICY GROUP OR FECA NUMBER		PATIENT AND INSURED INFO	
a. INSURED'S DATE OF BIRTH	MM   DD   YY		SEX
	<input type="text"/>		M <input type="checkbox"/> F <input type="checkbox"/>
b. OTHER CLAIM ID (Designated by NUCC)	<input type="text"/>		
c. INSURANCE PLAN NAME OR PROGRAM NAME	Kaiser Bronze		
d. IS THERE ANOTHER HEALTH BENEFIT PLAN?	<input type="checkbox"/>		

The "Insurance Plan Name or Program Name" is the name of the plan or program of the insured as indicated in Item Number 1a

New Cut Copy Paste Delete Export Save Cancel

### Plan/Program List

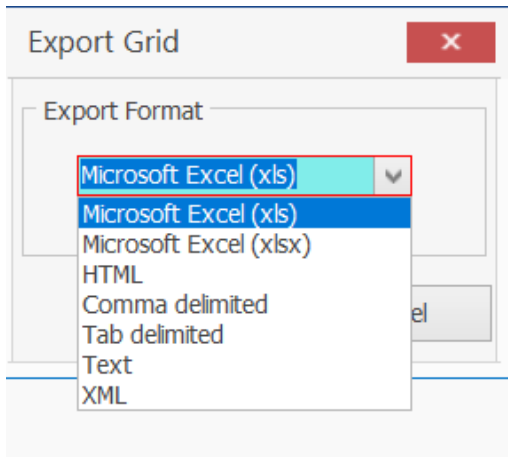
Look For:  In: Name Find Now Clear

Drag a column header here to group by that column

Name	Misc
▶ Kaiser Bronze	

Name	<input type="text" value="Kaiser Bronze"/>
Misc.	<input type="text"/>
Notes	<input type="text"/>

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



## 2.1.2.8 Supplemental Information Table

You can Add, Edit, Delete, and Export Plan / Program data from this screen. Data from this screen fills the shaded portion on field 24 on the claim form

24. A.	DATE(S) OF SERVICE						B. PLACE OF SERVICE	C. EMG	D. PROCEDURES, SERVICES, OR SUF (Explain Unusual Circumstances)	
	From				To				CPT/HCPCS	MODIFIER
MM	DD	YY	MM	DD	YY					
N460505083404 UN1										

The following are types of supplemental information that can be entered in the shaded areas of Item Number 24:

- Narrative description of unspecified codes
- National Drug Codes (NDC) for drugs
- Contract rate
- Tooth numbers and areas of the oral cavity

New Cut Copy Paste Delete Export Save Cancel

### Supplemental Information Need Help?

Look For:  In: Description Find Now Clear

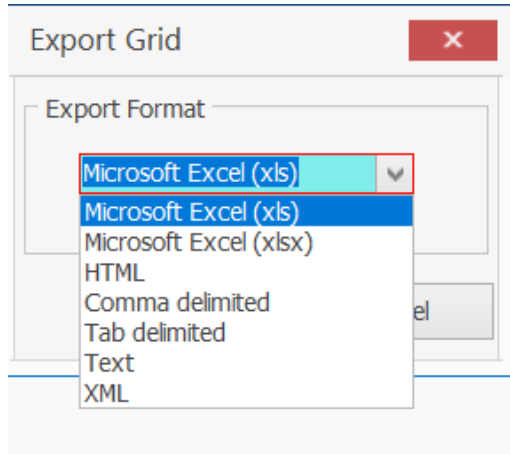
Drag a column header here to group by that column

Description
▶ N400024584101 ML16
N460505083404 UN1

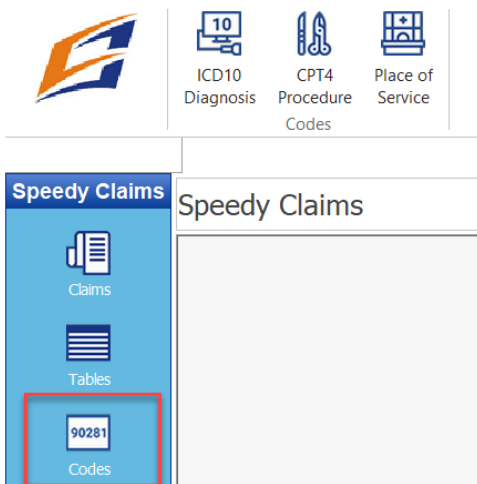
Description	<input style="width: 95%;" type="text" value="N400024584101 ML16"/>
Notes	<input style="width: 95%;" type="text" value="Ziv-Alfibercept ZALTRAP 400 MG. Zaltrap is available as 200 MG per 8 ML (25 MG per ML) solution, single-use vial, NDC 000245841-01."/>

- Add Supplemental Information - To add a new Supplemental Information, simply click the New icon, fill in the relevant data, and click Save.
- Edit Supplemental Information - To edit the Supplemental Information select the Description from the list, change the data and click Save.
- Delete Supplemental Information - To delete Supplemental Information from the system select the Description from the list and click the delete icon.

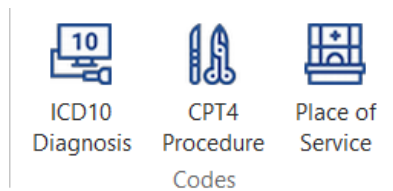
- Export Supplemental Information - You can export the Supplemental Information list for use in another program if you wish. Simply click on the export icon and select the format you want to use.



## 2.1.3 Codes Button



There are 3 tables in the Codes section of Speedy Claims



[ICD-10 Diagnosis Codes](#) - the classification system of diagnosis codes representing conditions and diseases, related health problems, abnormal findings, signs, and symptoms

[CPT4 Procedure Codes](#) - a set of healthcare procedure codes based on the American Medical Association's Current Procedural Terminology (CPT).

[Place of Service Codes](#) - two-digit codes placed on health care professional claims to indicate the setting in which a service was provided

### 2.1.3.1 ICD-10 Diagnosis

You can manage your ICD-10 Diagnosis codes library by selecting ICD-10 Diagnosis at the top menu after selecting the Codes Button from the main menu on the left..

Codes |

New Cut Copy Paste Delete Export Import Codes Save Cancel

## ICD10 Diagnosis Need Help? 1-844-267-1500 Free Support

Look For:  In: Description Find Now Clear

Drag a column header here to group by that column

Code	Description
H04412	Chronic dacryocystitis of left lacrimal passage
H04413	Chronic dacryocystitis of bilateral lacrimal passages
H04419	Chronic dacryocystitis of unspecified lacrimal passage
H04421	Chronic lacrimal canaliculitis of right lacrimal passage
H04422	Chronic lacrimal canaliculitis of left lacrimal passage
H04423	Chronic lacrimal canaliculitis of bi lacrimal passages
H04429	Chronic lacrimal canaliculitis of unsp lacrimal passage
H04431	Chronic lacrimal mucocele of right lacrimal passage
H04432	Chronic lacrimal mucocele of left lacrimal passage
H04433	Chronic lacrimal mucocele of bilateral lacrimal passages
H04439	Chronic lacrimal mucocele of unspecified lacrimal passage
H04511	Dacryolith of right lacrimal passage

Code:

Description:

Notes:

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

Code

Description

Notes

Changed By  Date

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon to save the code. You can edit any code by simply highlighting the code and changing the data in the fields below and clicking Save.

The Diagnosis codes listed here are used in Block 21 on the form. If you are filling out a new claim form you can simply double click on a diagnosis code line in Block 24D to bring up this list. Then you can import your choice of code by double clicking on the code itself.

### 2.1.3.2 CPT4 Procedure

You can manage your CPT4 Procedure codes library by selecting CPT4 Procedure at the top menu after selecting the Codes Button from the main menu on the left.

The screenshot shows the 'CPT4 Procedures' window. At the top is a toolbar with icons for New, Cut, Copy, Paste, Delete, Export, Import Codes, Save, and Cancel. Below the toolbar is a search bar with 'Look For:' and 'In: Description' dropdown, and 'Find Now' and 'Clear' buttons. A table lists procedure codes with '99396' selected. Below the table is an input form for the selected code.

Code	Description
12002	1-inch cut stitch
71045	Chest X-ray
90658	Flu shot administered
99396	Physical checkup
99397	Preventive exam patient over 65

Code: 99396  
Description: Physical checkup  
Amount: 85.00  
Notes:

As you can see, the software does not contain any Procedure codes when it is first installed. You can add the appropriate codes for your practice individually by 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.

This is a close-up of the input form from the previous screenshot. It shows the following fields:

Code: 99396  
Description: Physical checkup  
Amount: 85.00  
Notes:

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon to save the code. You can edit any code by simply highlighting the code and changing the data in the fields below and clicking Save.

The Procedure codes listed here are used in Block 24D on the form. If you are filling out a new claim form, you can simply double click in Block 24D to bring up this list. Then you can import your choice of code by double clicking on the code itself. If you have a charge amount assigned to the procedure code, it will populate in the charge field in 24F as well.

**2.1.3.3 Place of Service**

The Place of Service Codes come pre-loaded in your Speedy Claims

## Place of Service

Need Help? [1-844-267-1500](tel:1-844-267-1500) Free Support

In: Code ▼

Find Now Clear

Drag a column header here to group by that column

Code	Name
▶ 1	Pharmacy
2	Telehealth
3	School
4	Homeless Shelter
5	Indian Health Service Free-standing Facility
6	Indian Health Service Provider-based Facility
7	Tribal 638 Free-standing Facility
8	Tribal 638 Provider-based Facility
9	Prison/Correctional Facility
11	Office
12	Home
13	Assisted Living Facility
14	Group Home
15	Mobile Unit
16	Temporary Lodging
17	Walk-in Retail Health Clinic
18	Place of Employment-Worksite
19	Off-Campus Outpatient Hospital

Code
**1**

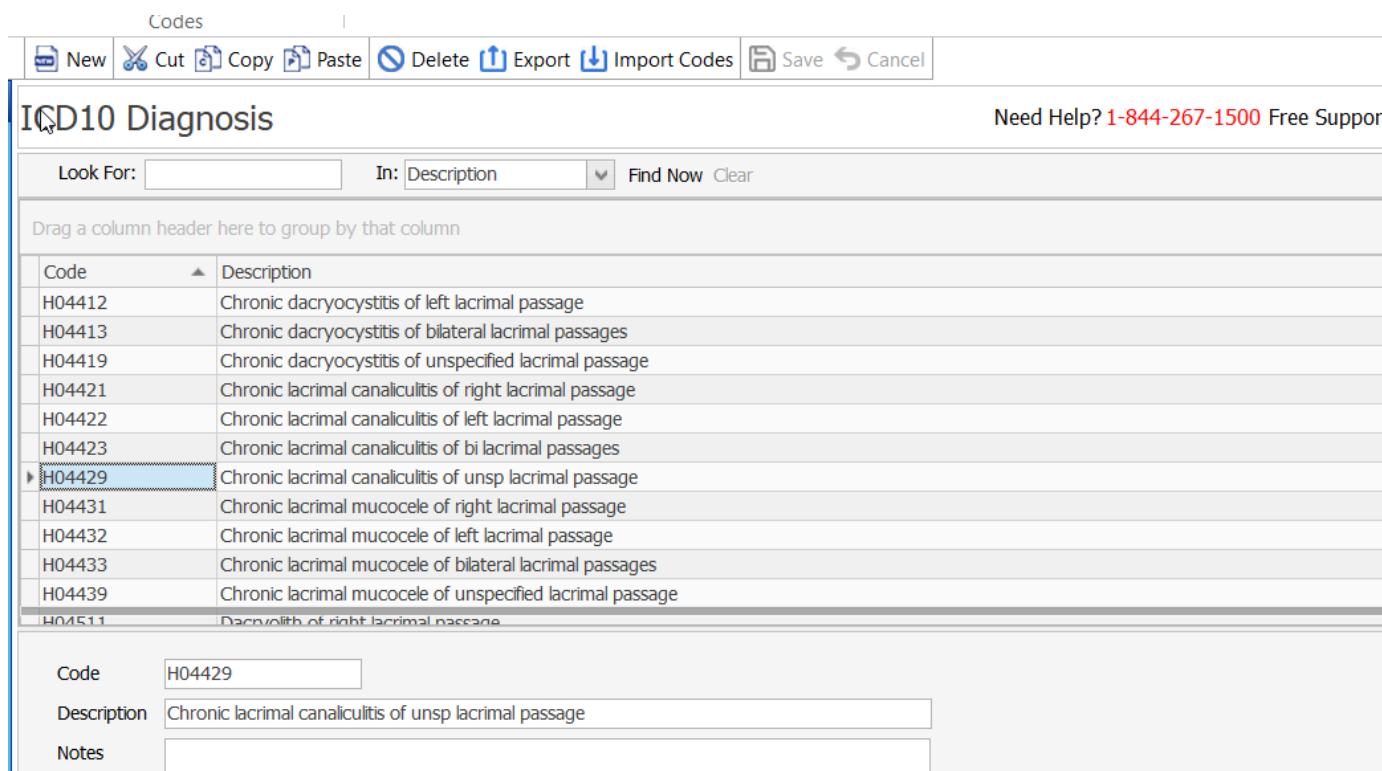
Name
**Pharmacy**

Description
**A facility or location where drugs and other medically related items and services are sold, dispensed, or otherwise provided directly to patients.**

The Place of Service codes listed here are used in Block 24B on the form. If you are filling out a new claim form you can simply double click on the Place of Service field in Block 24B to bring up this list. Then you can import your choice of code by double clicking on the code itself. This code can be manually entered on the claim form as well.

### 2.1.3.1 ICD-10 Diagnosis

You can manage your ICD-10 Diagnosis codes library by selecting ICD-10 Diagnosis at the top menu after selecting the Codes Button from the main menu on the left..



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.

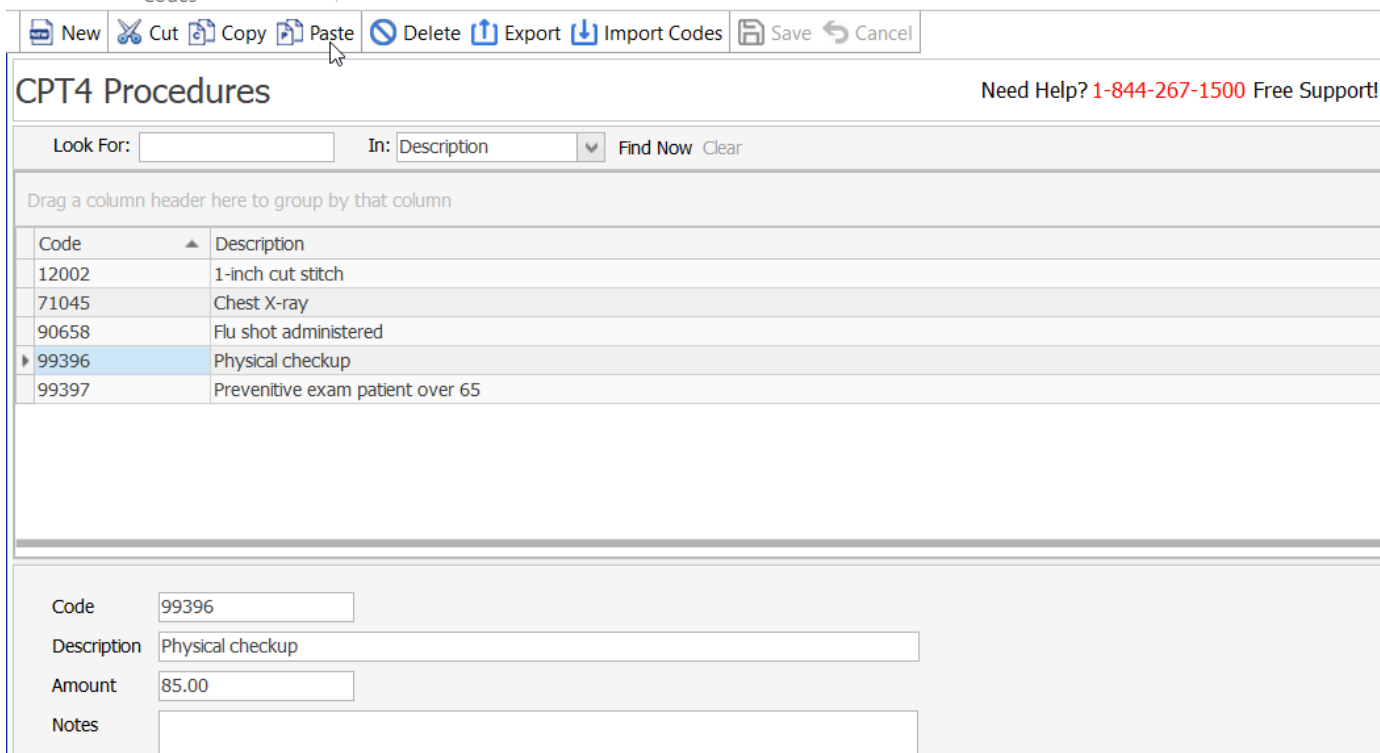
The screenshot shows the input fields for adding a new ICD-10 diagnosis code. The 'Code' field is highlighted with a red border and contains the text 'H04429'. The 'Description' field is empty. The 'Notes' field is empty. Below the input fields, there are labels for 'Changed By' and 'Date'.

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon to save the code. You can edit any code by simply highlighting the code and changing the data in the fields below and clicking Save.

The Diagnosis codes listed here are used in Block 21 on the form. If you are filling out a new claim form you can simply double click on a diagnosis code line in Block 24D to bring up this list. Then you can import your choice of code by double clicking on the code itself.

### 2.1.3.2 CPT4 Procedure

You can manage your CPT4 Procedure codes library by selecting CPT4 Procedure at the top menu after selecting the Codes Button from the main menu on the left.



The screenshot shows the 'CPT4 Procedures' window. At the top is a toolbar with icons for New, Cut, Copy, Paste, Delete, Export, Import Codes, Save, and Cancel. Below the toolbar, the window title is 'CPT4 Procedures' and there is a help link: 'Need Help? 1-844-267-1500 Free Support!'. A search bar contains 'Look For:' and 'In: Description' with a 'Find Now' button and a 'Clear' link. Below the search bar is a table of procedure codes:

Code	Description
12002	1-inch cut stitch
71045	Chest X-ray
90658	Flu shot administered
99396	Physical checkup
99397	Preventive exam patient over 65

Below the table is an input form for a new procedure code:

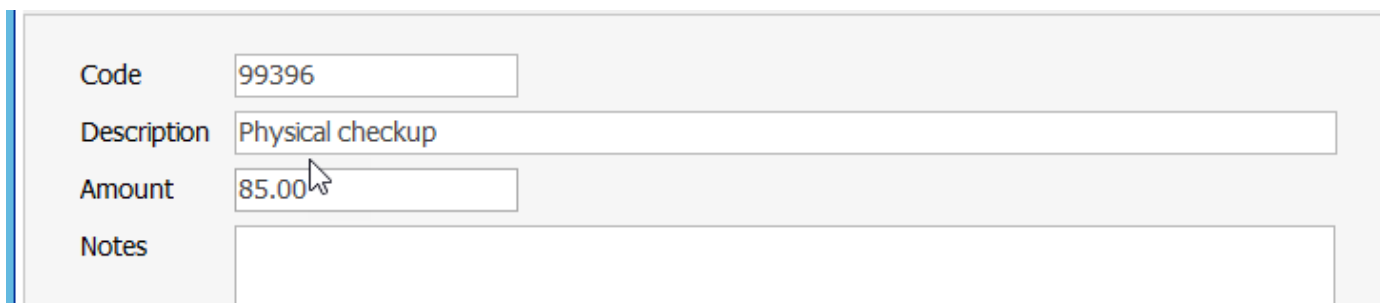
Code:

Description:

Amount:

Notes:

As you can see, the software does not contain any 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.



This is a close-up of the input form from the previous screenshot. It shows the following fields:

Code:

Description:

Amount:

Notes:

Enter the code number in the top field and the code description in the bottom field. Click on the Save icon to save the code. You can edit any code by simply highlighting the code and changing the data in the fields below and clicking Save.

The Procedure codes listed here are used in Block 24D on the form. If you are filling out a new claim form you can simply double click in Block 24D to bring up this list. Then you can import your choice of code by double clicking on the code itself. If you have a charge amount assigned to the procedure code, it will populate in the charge field in 24F as well.

### 2.1.3.3 Place of Service

The Place of Service Codes come pre-loaded in your Speedy Claims

Place of Service Need Help? [1-844-267-1500](tel:1-844-267-1500) Free Support

Look For:  In: Code ▼ Find Now Clear

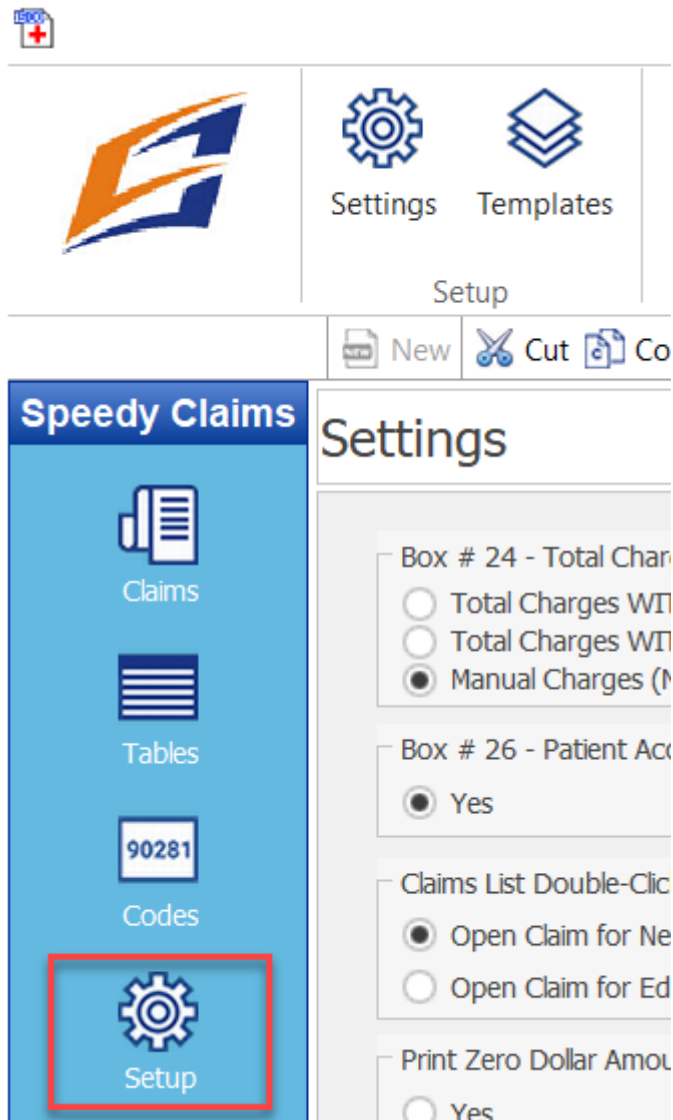
Drag a column header here to group by that column

Code	Name
1	Pharmacy
2	Telehealth
3	School
4	Homeless Shelter
5	Indian Health Service Free-standing Facility
6	Indian Health Service Provider-based Facility
7	Tribal 638 Free-standing Facility
8	Tribal 638 Provider-based Facility
9	Prison/Correctional Facility
11	Office
12	Home
13	Assisted Living Facility
14	Group Home
15	Mobile Unit
16	Temporary Lodging
17	Walk-in Retail Health Clinic
18	Place of Employment-Worksite
19	Off-Campus Outpatient Hospital

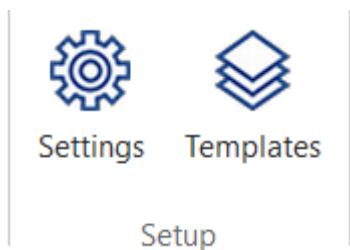
Code **1**  
Name **Pharmacy**  
Description **A facility or location where drugs and other medically related items and services are sold, dispensed, or otherwise provided directly to patients.**

The Place of Service codes listed here are used in Block 24B on the form. If you are filling out a new claim form you can simply double click on the Place of Service field in Block 24B to bring up this list. Then you can import your choice of code by double clicking on the code itself. This code can be manually entered on the claim form as well.

## 2.1.4 Setup Button



There are 2 options that show up at the top when you click on the Setup Button.



### 2.4.1.1 Settings

Your Settings window is where you can set certain preferences for your Speedy Claims functions and claim output. The software comes with default fields already selected to meet standard claim requirements. All setting options can be changed to meet your needs.

# Settings

<b>Box # 24 - Total Charges</b> <input type="radio"/> Total Charges WITH Multiplied Days or Units <input type="radio"/> Total Charges WITHOUT Multiplied Days or Units <input checked="" type="radio"/> Manual Charges (No Calculations)	<b>Program Protection Password</b> Password <b>Not Set</b> <input type="button" value="Set"/> <input type="button" value="Change"/> <input type="button" value="Disable"/>
<b>Box # 26 - Patient Account No. - Auto Create</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	<b>Check for Updates Automatically</b> <input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Claims List Double-Click Behavior</b> <input checked="" type="radio"/> Open Claim for New Copy <input type="radio"/> Open Claim for Edit	<b>Automatic Data Backup</b> <input type="radio"/> On <input checked="" type="radio"/> Off
<b>Print Zero Dollar Amounts</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Print the decimal point in ICD Codes</b> <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Default Print Type</b> <input checked="" type="radio"/> Print on Red CMS-1500 Form <input type="radio"/> Print on Blank 8.5 x 11 Paper (Color) <input type="radio"/> Print on Blank 8.5 x 11 Paper (Black)	<b>Claims List Range</b> Show Previous : <input type="text" value="12 Months"/> <input type="button" value="v"/>
<b>Scrub Warning before Print</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	

<b>Box # 24 - Total Charges</b> <input checked="" type="radio"/> Total Charges WITH Multiplied Days or Units <input type="radio"/> Total Charges WITHOUT Multiplied Days or Units <input type="radio"/> Manual Charges (No Calculations)
---

## Box #24 - Total Charges

Total Charges WITH Multiplied Days or Units - This option will multiply your charges in 24F by the units in 24G showing the total charge for all lines in 28

Total Charges WITHOUT multiplied Days or Units - This option will NOT multiply your charges in 24F by the units in 24G. It will show the total charge for all lines in 28

Manual Charges (No Calculations) - This option will NOT multiply charges in 24F by units in 24G. It will NOT show the total charge for all lines in 28.

<b>Box # 26 - Patient Account No. - Auto Create</b> <input type="radio"/> Yes <input checked="" type="radio"/> No
--

### Box #26 Patient Account No - Auto Create

Having this selected (Yes) the program will automatically create an account number for patients based on part of their name and birthday. IN general, claim will require a patient account number in field #26. If you are not using your own account numbers for patients for this field, the YES is recommended.

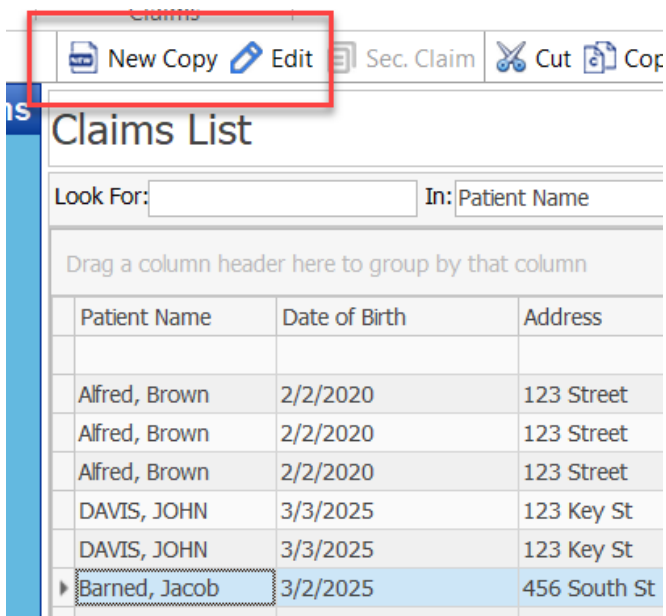
Claims List Double-Click Behavior

Open Claim for New Copy

Open Claim for Edit

### Claim List Double-Click Behavior

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.



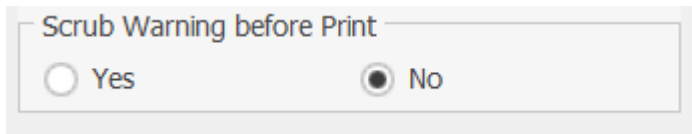
This setting can be overridden at any time by using the Right Click Menu in the Claim List, or by highlighting an existing claim and selecting either New Copy or Edit

Print Zero Dollar Amounts

Yes  No

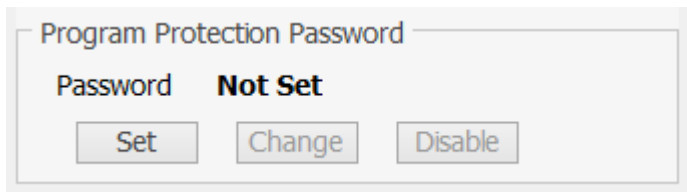
### Print Zero Dollar Amounts

In any charge field such as 28 and 29, this is to set the program to either print 0.00 dollar amounts or leave blank. The No option is the default as leaving these fields blank when printing are mostly preferred by insurance.



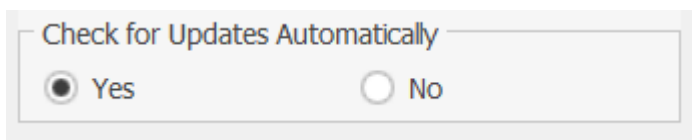
### Scrub Warning Before Print

This setting will affect the program by doing a prompted claim scrub checking for any missing or incorrect standard fields on the claim when selecting to print.



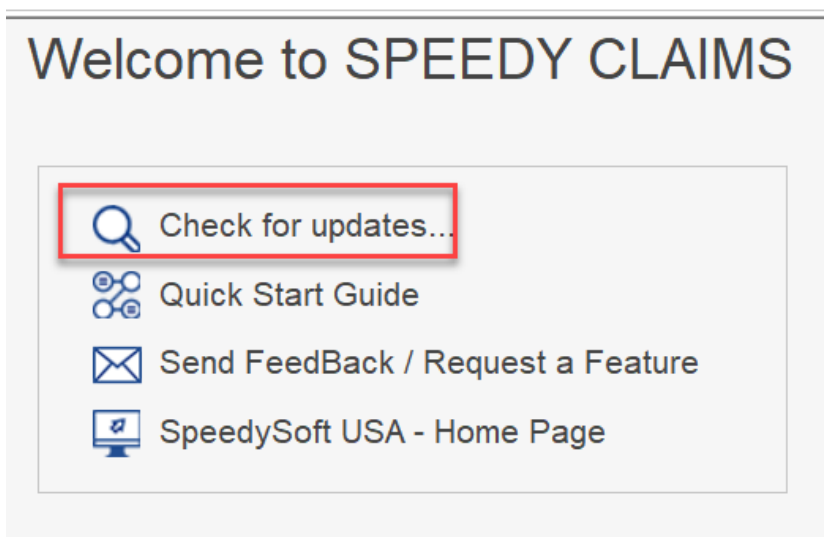
### Program Protection Password

In this setting, you can choose to set up a password prompt required when opening the program. Additional options are here to change or disable your password.



### Check for Updates Automatically

This option allows the program to check for any software updates when opening the application. If it is selected NO, checking for updated can be done manually anytime from the opening program screen.



You must be connected to the Internet and online to receive updates.

Automatic Data Backup

On  Off

### Automatic Data Backup

This option is to set whether to prompt a backup save window when closing the application or not to. A data backup can be done manually through your [Tools](#)

Print the decimal point in ICD Codes

Yes  No

### Print the decimal point in ICD Codes

This option allows you to choose whether to print the decimal in your diagnosis code This requirement may vary depending on the insurance you are billing.

Claims List Range

Show Previous : 12 Months

### Claim List Range

In your [Claims List](#), the default setting is to show claims within the last 12 months' "date of service." This enables the list to load more quickly. You can change that

default here, as well as toggle it from within the [Claims List](#) itself, using the drop-down at the top

Claims List Need Help

Look For:  In: Patient Name   Show Previous : 12 Months

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Insure

### 2.4.1.2 Templates

Speedy Claims

Settings Templates

Setup

New Cut Copy Paste Delete Save Cancel

Speedy Claims

Claims

Tables

90281

Codes

Setup

Create Template - Do Not Enter Patient Data Here Need Help? 1-

**Template Field Values - Edit**

Template:  Template Name:

Changed By: **matt** Changed Date: **02/24/2025 9:37:08 AM**  Use 4 Digit Service Year on Forms

2

3

4

5

You can create a Template to automatically prefill your claim forms with the information you usually include on every form. First click on “Setup” on your main navigation field on the lower left of your screen. Next, click on the “**Templates**” at the top to pull up an image of the form. Give your template a name where it states “**Template Name**” at the upper right. Then just fill in any fields that will always contain the same information. Suggested field's are

- # 12 and 13 – Signature on File,
- # 24B – Place of Service,
- # 24J – Rendering Provider NPI,
- # 25 ID Number,
- # 27 – Accept Assignment and
- # all of 31, 32 and 33.

Once completed, click on **Save** at the top. When creating new claims, this information will populate automatically when you fill out the claim.

Additional [templates](#) can be created for additional rendering or billing providers by selecting New at the upper left. At the top right, give it a different Template Name and make your changes. Save when you are done. With multiple templates, ensure you select the correct one on your main CMS-1500 form before entering your claim data.

**Speedy Claims**

**CMS 1500 - 02/12 (With NPI)**
Need Help? 1-844-267-1500 Fre

Template: **Template 1**

 Active  
 Paid  
 Use 4 Digit Service Year on Forms
 
Page 1 of 1

Mode: **N** Template 1

Status: **Template 2**

Payor ID

**HEALTH INSURANCE CLAIM FORM**  
 APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

PICA

1. MEDICARE <input type="checkbox"/> (Medicare#) MEDICAID <input type="checkbox"/> (Medicaid#) TRICARE <input type="checkbox"/> (ID#/DoD#) CHAMPVA <input type="checkbox"/> (Member ID#) GROUP HEALTH PLAN <input type="checkbox"/> (ID#) FECA <input type="checkbox"/> (ID#) BLK/LUNG <input type="checkbox"/> (ID#) OTHER <input type="checkbox"/> (ID#)	1a. INSURED'S I.D. NUMBER (For Program in It)
2. PATIENT'S NAME (Last Name, First Name, Middle Initial)	3. PATIENT'S BIRTH DATE (MM/DD/YY) M F SEX
4. INSURED'S NAME (Last Name, First Name, Middle Initial)	5. PATIENT'S ADDRESS (No., Street)
6. PATIENT RELATIONSHIP TO INSURED Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other <input type="checkbox"/>	7. INSURED'S ADDRESS (No., Street)
8. RESERVED FOR NUCC USE	CITY STATE
CITY STATE	CITY STATE
ZIP CODE TELEPHONE (Include Area Code)	ZIP CODE TELEPHONE (Include Area Code)

9. OTHER INSURER'S NAME (Last Name, First Name, Middle Initial)
 10. IS PATIENT'S COMPTON DEL AYER TO
 11. INSURER'S POLICY GROUP OR FECA NUMBER

### 2.4.1.1 Settings

Your Settings window is where you can set certain preferences for your Speedy Claims functions and claim output. The software comes with default fields already selected to meet standard claim requirements. All setting options can be changed to meet your needs.

## Settings

The screenshot shows a settings window with the following sections:

- Box # 24 - Total Charges:** Three radio button options:  Total Charges WITH Multiplied Days or Units,  Total Charges WITHOUT Multiplied Days or Units, and  Manual Charges (No Calculations).
- Program Protection Password:** Password field with text "Not Set" and three buttons: "Set", "Change", and "Disable".
- Box # 26 - Patient Account No. - Auto Create:** Two radio button options:  Yes and  No.
- Check for Updates Automatically:** Two radio button options:  Yes and  No.
- Claims List Double-Click Behavior:** Two radio button options:  Open Claim for New Copy and  Open Claim for Edit.
- Automatic Data Backup:** Two radio button options:  On and  Off.
- Print Zero Dollar Amounts:** Two radio button options:  Yes and  No.
- Print the decimal point in ICD Codes:** Two radio button options:  Yes and  No.
- Default Print Type:** Three radio button options:  Print on Red CMS-1500 Form,  Print on Blank 8.5 x 11 Paper (Color), and  Print on Blank 8.5 x 11 Paper (Black).
- Scrub Warning before Print:** Two radio button options:  Yes and  No.
- Claims List Range:** A dropdown menu with the text "Show Previous : 12 Months" and a downward arrow.

This is a close-up of the "Box # 24 - Total Charges" section from the settings window. It contains three radio button options:  Total Charges WITH Multiplied Days or Units,  Total Charges WITHOUT Multiplied Days or Units, and  Manual Charges (No Calculations).

### Box #24 - Total Charges

**Total Charges WITH Multiplied Days or Units** - This option will multiply your charges in 24F by the units in 24G showing the total charge for all lines in 28

**Total Charges WITHOUT multiplied Days or Units** - This option will NOT multiply your charges in 24F by the units in 24G. It will show the total charge for all lines in 28

**Manual Charges (No Calculations)** - This option will NOT multiply charges in 24F by units in 24G. It will NOT show the total charge for all lines in 28.

Box # 26 - Patient Account No. - Auto Create

Yes  No

### Box #26 Patient Account No - Auto Create

Having this selected (Yes) the program will automatically create an account number for patients based on part of their name and birthday. IN general, claim will require a patient account number in field #26. If you are not using your own account numbers for patients for this field, the YES is recommended.

Claims List Double-Click Behavior

Open Claim for New Copy  
 Open Claim for Edit

### Claim List Double-Click Behavior

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.

The screenshot shows the 'Claims List' window. A right-click context menu is open over a row in the table, with 'New Copy' and 'Edit' options highlighted by a red box. The table contains the following data:

Patient Name	Date of Birth	Address
Alfred, Brown	2/2/2020	123 Street
Alfred, Brown	2/2/2020	123 Street
Alfred, Brown	2/2/2020	123 Street
DAVIS, JOHN	3/3/2025	123 Key St
DAVIS, JOHN	3/3/2025	123 Key St
Barned, Jacob	3/2/2025	456 South St

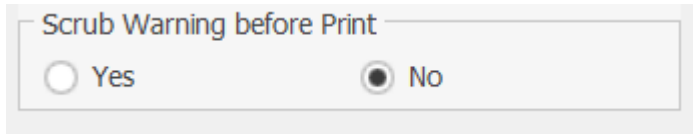
This setting can be overridden at any time by using the Right Click Menu in the Claim List, or by highlighting an existing claim and selecting either New Copy or Edit

Print Zero Dollar Amounts

Yes  No

### Print Zero Dollar Amounts

In any charge field such as 28 and 29, this is to set the program to either print 0.00 dollar amounts or leave blank. The No option is the default as leaving these fields blank when printing are mostly preferred by insurance.

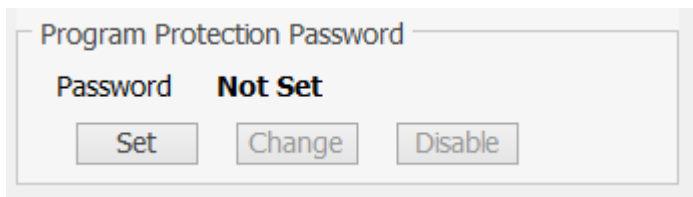


Scrub Warning before Print

Yes  No

### Scrub Warning Before Print

This setting will affect the program by doing a prompted claim scrub checking for any missing or incorrect standard fields on the claim when selecting to print.

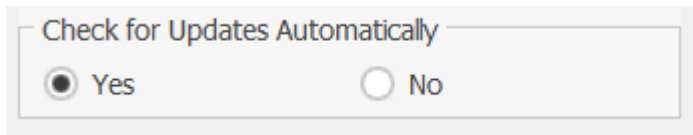


Program Protection Password

Password **Not Set**

### Program Protection Password

In this setting, you can choose to set up a password prompt required when opening the program. Additional options are here to change or disable your password.

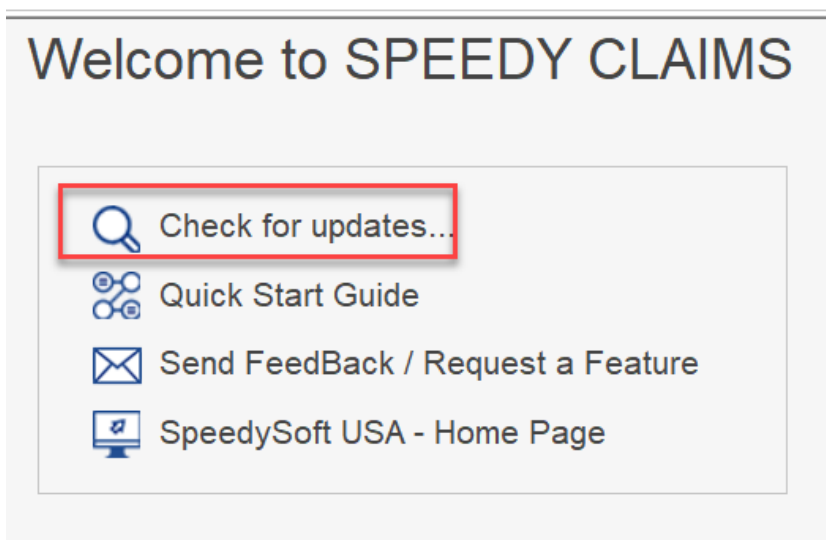


Check for Updates Automatically

Yes  No

### Check for Updates Automatically

This option allows the program to check for any software updates when opening the application. If it is selected NO, checking for updated can be done manually anytime from the opening program screen.



You must be connected to the Internet and online to receive updates.

Automatic Data Backup

On  Off

### Automatic Data Backup

This option is to set whether to prompt a backup save window when closing the application or not to. A data backup can be done manually through your [Tools](#)

Print the decimal point in ICD Codes

Yes  No

### Print the decimal point in ICD Codes

This option allows you to choose whether to print the decimal in your diagnosis code This requirement may vary depending on the insurance you are billing.

Claims List Range

Show Previous : 12 Months

### Claim List Range

In your [Claims List](#), the default setting is to show claims within the last 12 months' "date of service." This enables the list to load more quickly. You can change that

default here, as well as toggle it from within the [Claims List](#) itself, using the drop-down at the top

Claims List

Look For:  In: Patient Name   Show Previous : 12 Months  Include

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Insure

## 2.4.1.2 Templates

Speedy Claims - Version : 7.7.0.90

Settings Templates

Setup

New Cut Copy Paste Delete Save Cancel

Speedy Claims

Claims

Tables

90281

Codes

Setup

Create Template - Do Not Enter Patient Data Here [Need Help? 1-](#)

**Template Field Values - Edit**

Template:  Template Name:

Changed By: **matt** Changed Date: **02/24/2025 9:37:08 AM**  Use 4 Digit Service Year on Forms

2														
3														
4														
5														

You can create a Template to automatically prefill your claim forms with the information you usually include on every form. First click on "Setup" on your main navigation field on the lower left of your screen. Next, click on the "Templates" at the top to pull up an image of the form. Give your template a name where it states "Template Name" at the upper right. Then just fill in any fields that will always contain the same information and select "SAVE". Suggested field's are


- # 12 and 13 – Signature on File,
- # 24B – Place of Service,
- # 24J – Rendering Provider NPI,
- # 25 ID Number,
- # 27 – Accept Assignment and
- # all of 31, 32 and 33.

Once completed, click on **Save** at the top. When creating new claims, this information will populate automatically when you fill out the claim.

Additional [templates](#) can be created for additional rendering or billing providers by selecting New at the upper left. At the top right, give it a different Template Name and make your changes. Save when you are done. With multiple templates, ensure you select the correct one on your main CMS-1500 form before entering your claim data.

The screenshot displays the CMS 1500 Claim form interface. At the top, there are navigation buttons for 'CMS 1500 Claim' and 'Claims List'. A toolbar includes 'New', 'Cut', 'Copy', 'Paste', 'Create Batch', 'Close Batch', 'Scrub', 'Print', 'Save', and 'Cancel'. A sidebar on the left, titled 'Speedy Claims', contains icons for 'Claims', 'Tables', 'Codes', 'Setup', 'Tools', and 'Scheduler'. The main header shows 'CMS 1500 - 02/12 (With NPI)' and 'Need Help? 1-844-267-1500'. Below this is a 'Template' dropdown menu with 'Template 1' selected, a 'Mode' dropdown with 'Template 1' selected, and a 'Status' dropdown with 'Template 2' selected. A red arrow points to the 'Template 1' dropdown. To the right of the dropdowns are checkboxes for 'Active', 'Paid', and 'Use 4 Digit Service Year on Forms'. Further right are 'Page 1 of 1', 'ADD PAGE', and 'Make Secondary Claim' buttons. The main form area is titled 'HEALTH INSURANCE CLAIM FORM' and includes a QR code, 'Payor ID' field, and various input fields for patient and insurer information.

## 2.1.5 Tools Button





- Data Backup •
- Data Restore •
- Calculator •


---


New Cut C


**Speedy Claims**

  
Claims

  
Tables

  
Codes

  
Setup


  
Tools

CMS 1500 - 02

Template:

Mode: **Edit**

Status:

  
**HEALTH INSU**  
APPROVED BY NATIONAL  
PICA  
 1. MEDICARE    ME  
 (Medicare#)     (Me  
 2. PATIENT'S NAME (Las  
  
 5. PATIENT'S ADDRESS  
  
 CITY

This section is for additional functions including your recommended Data Backup

• Data Backup	• Print Blank Form - Front	• Buy Forms
• Data Restore	• Print Blank Form - Back	• Program Info
• Calculator	• Test Printer Alignment	• Deregister
<b>Tools</b>		

**Data Backup** - Used to create a current backup of all data in your Speedy Claims database. This is recommended to be done frequently and saved OFF your computer in the case of a computer failure or crash. Saving to a USB or separate drive is suggested. This function is also suggested for the process of [transferring](#) your program to a different computer.

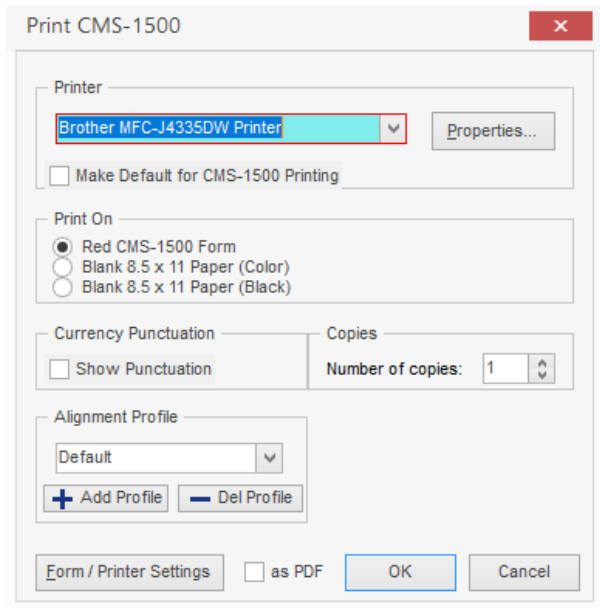
**Data Restore** - This step is used to Restore a saved Backup file into your Speedy Claims. This is mainly used when installing Speedy Claims to a new computer for either a crash or [transfer](#) purposes.

**Calculator** - Pulls up your computer's calculator

**Print Blank Form-Front** - Used if needed for printing the blank claim front onto blank paper.

**Print Blank Form-Back** - Used if needed for printing the back of the claim form onto blank paper

**Test Printer Alignment** - This will pull up your print dialog window. In here can test print with all fields filled in to check and adjust your printer alignment. The print dialog window is also where you will see your [Form / Printer Settings](#) which is where printer alignment adjustments can be made.



**Buy Forms** - This link will take you to justcms1500forms.com where you can purchase claim forms and envelopes

**Program Info** - This section will give you your program details such as, version / build number, license, and database location.

About Speedy Claims

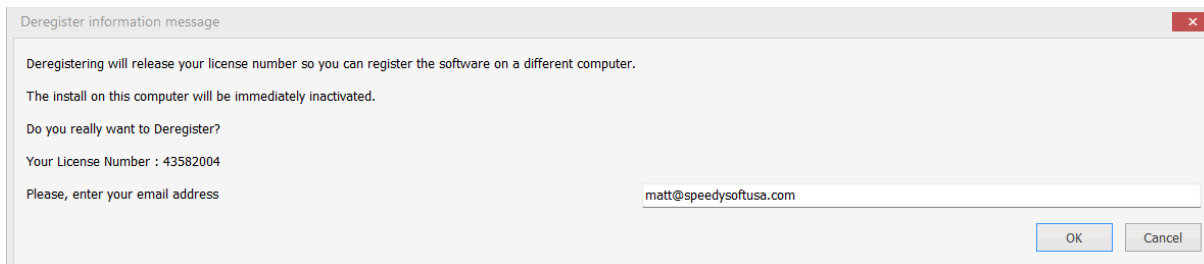


**Version 7.70**  
Build Number: 7.7.0.90  
License Number: 43582004  
Registration Number: jtghgvgmhqwqnmgyqccxmhmhagmfnnhnjj  
Database Version: 7.7\_20250118  
Database Location: C:\ProgramData\SpeedySoft\SpeedyClaimsv7\formsdb.abs  
Operating System:  
Screen Scaling: 120

Customer Service [customerservice@speedysoftusa.com](mailto:customerservice@speedysoftusa.com)

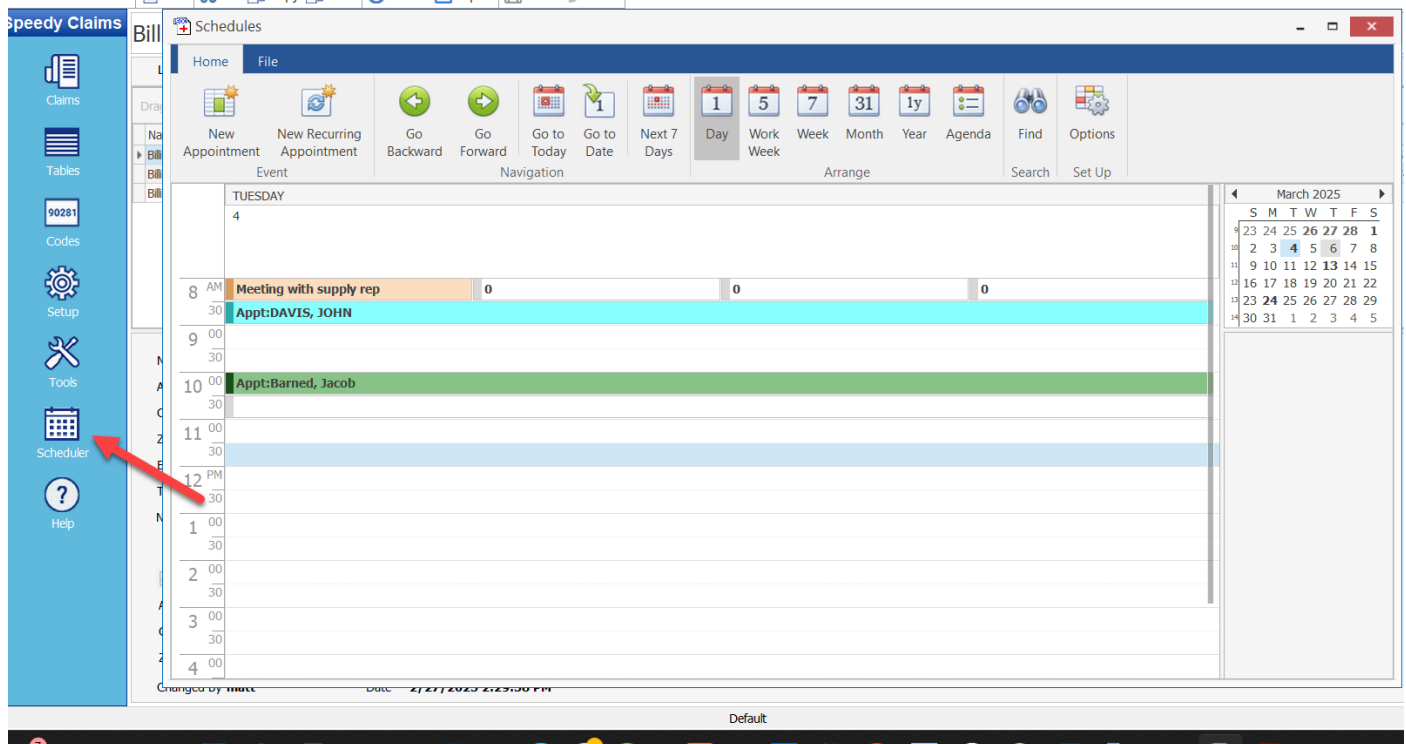
OK

**Deregister** - This function is used to release your license number from the current installation. It will give you your current license as well as email it to the email you provide. This is one of the main steps when [transferring](#) your Speedy Claims to another computer.

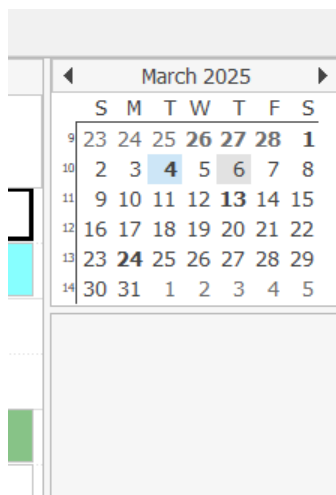


## 2.1.6 Scheduler

The Scheduler button will open your scheduler in a separate window. This allows you to navigate between both applications simultaneously..



The Calendar on your right will allow you to jump anywhere in your scheduler by simply clicking on the date.



### 2.1.6.1 Creating Appointment

Your scheduler is connected to your Speedy Claims Patient list. When you double click on a selected time or click on New Appointment, it will open your window to create an appointment.

Appointment - Untitled

Look For:  In: Name  Find Now Clear New Patient

Drag a column header here to group by that column

Name	Street	City	Sta	ZipCode	Phone	Cell	Date of Birth	Account Num
▶ Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DON, FRED	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DAVIS, JOHN	123 NO ADDRESS	ALBANY	CA	94706	0000000000		7/12/1985	0000915
Franklin, Miles	147 Side St	Columbo	MA	12345	3524555689	3524555689	12/21/1948	FRAMI221
Barker, Jihn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919
Cole, Susan	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	123 St	Eustis	FL	32726	1231231311		5/1/2024	LESMA120
Scheduler, Test	789 SW Ave	Parker	MN	78798	1231231313	1231131321	2/2/220	SCHTE222

Patient Name Lester, Matt  
 DOB 05/15/2024  
 Phone 1234567877  
 Cell  
 Account No. 78979879  
 Confirmed

Subject:   
 Location:  Label:  None

Start time: 3/11/2025 08:00 AM  All day event  
 End time: 3/11/2025 08:30 AM

Reminder: 15 minutes

In this section, you can select the patient, times, and assign label. Additional fields including location and notes can be entered here as well.

### 2.1.6.2 New Patient Appointment

If a patient has not been entered into Speedy Claims yet to your [Patient Table](#), you can select New Patient at the upper right.

Appointment - Untitled

Look For:  In: Name  Find Now Clear New Patient

Drag a column header here to group by that column

Name	Street	City	St	ZipCode	Phone	Cell	Date of Birth	Account Num
Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DON, FRED	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DAVIS, JOHN	123 NO ADDRESS	ALBANY	CA	94706	0000000000		7/12/1985	0000915
Franklin, Miles	147 Side St	Columbo	MA	12345	3524555689	3524555689	12/21/1948	FRAMI221
Barker, Jihn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919
Cole, Susan	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	123 St	Eustis	FL	32726	1231231311		5/1/2024	LESMA120
Scheduler, Test	789 SW Ave	Parker	MN	78798	1231231313	1231131321	2/2/220	SCHTE222

Load the provided fields to start the patient record setup and create the appointment.

New Patient

(Last Name, First Name, Middle Initial)

Name

Birth Date

Phone #

Cell #

Email

Account # (Box 26)

After saving, the new patient will be saved to your [Patient Table](#) and you can continue creating the appointment. Added details on the new patient record will be updated to you [Patient Table](#) through claim creation or direct table update in Speedy Claims

Barker, Jihn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919
Patient, New					3213212312		2/2/2001	PATNE220
Cole, Susan	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	123 St	Eustis	FL	32726	1231231311		5/1/2024	LESMA120

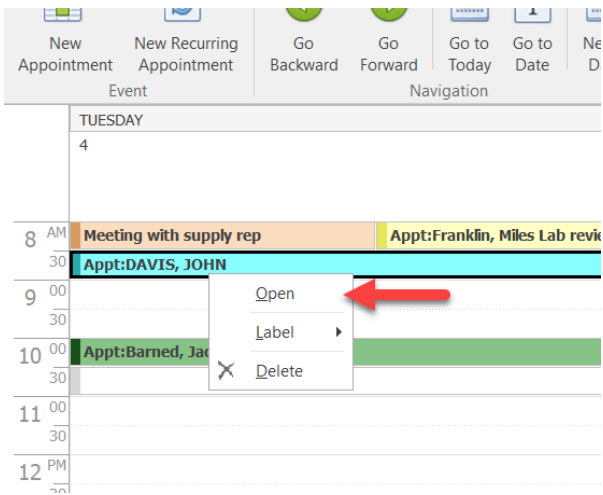
Patient Name Patient, New  
 DOB 02/02/2001  
 Phone 3213212312  
 Cell  
 Account No. PATNE220  
 Confirmed

Subject:

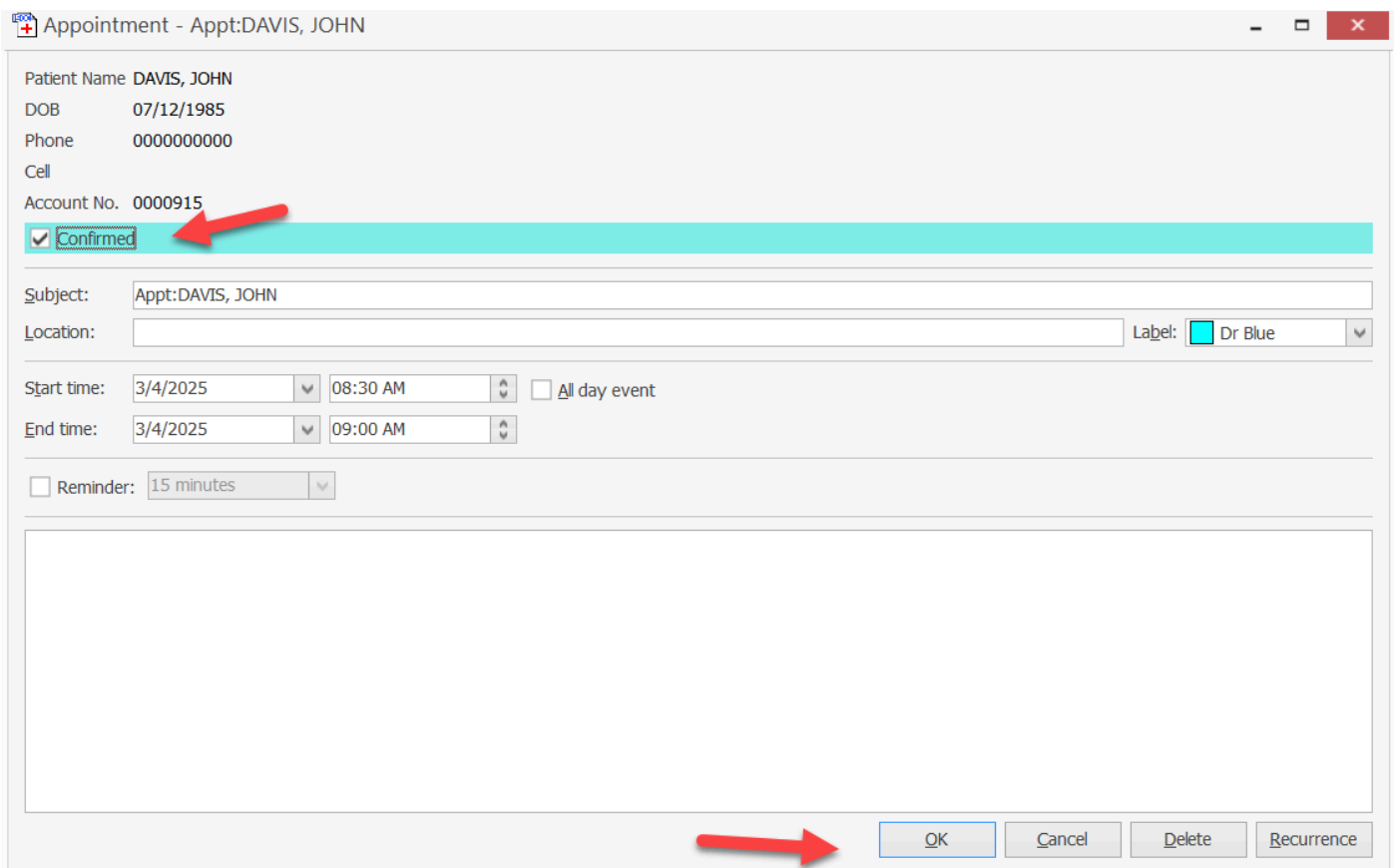
Location:  Label:

### 2.1.6.3 Confirming Appointment

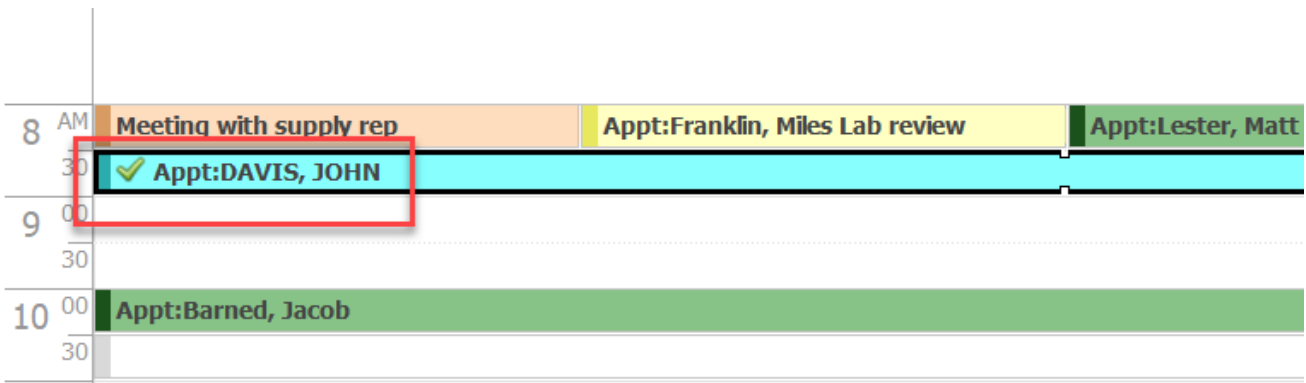
Existing appointments can be opened directly from your scheduler screen with either a double click or right-click, and selecting open.



This will pull up the appointment details. There is a Confirmed check box as well. To confirm an appointment, check the box and click OK below.



You will now see a check by the confirmed appointment on your main schedule screen.



### 2.1.6.4 Options / Setup

By clicking on Options on the upper right, you get your setup window to manage your schedule hours, display, and custom labels.

Day	Open	Start	Finish
Sunday	<input type="checkbox"/>	08:00 AM	06:00 PM
Monday	<input checked="" type="checkbox"/>	08:00 AM	06:00 PM
Tuesday	<input checked="" type="checkbox"/>	08:00 AM	06:00 PM
Wednesday	<input checked="" type="checkbox"/>	08:00 AM	01:00 PM
Thursday	<input checked="" type="checkbox"/>	08:00 AM	06:00 PM
Friday	<input checked="" type="checkbox"/>	08:00 AM	06:00 PM
Saturday	<input type="checkbox"/>	08:00 AM	06:00 PM

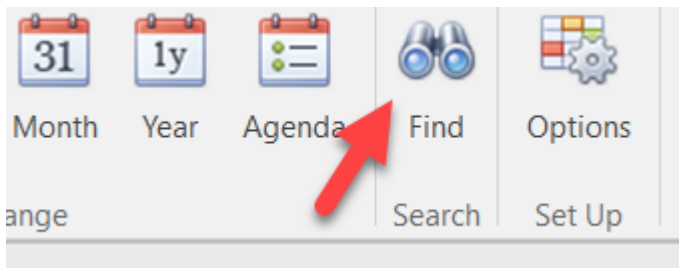
The Day Grid will be where you set up your default work time and display options.

The Time section in the middle can be used to customize set days and hours. In the example above, We have Saturday and Sunday selected as closed days. We also have Wednesdays set as early days ending at 1:00

In the Labels section, labels can be created and edited to suit your practice's specific needs. These helpful, color-coded labels make it easier to manage your schedule at a glance by indicating the purpose of an appointment or the physician's name by the assigned color.

### 2.1.6.5 Appointment Lookup

The Find button will pull up a search field to allow you to look up appointments created in your scheduler.



The search can be done by looking up details from any of the selected fields shown below.

Events Search

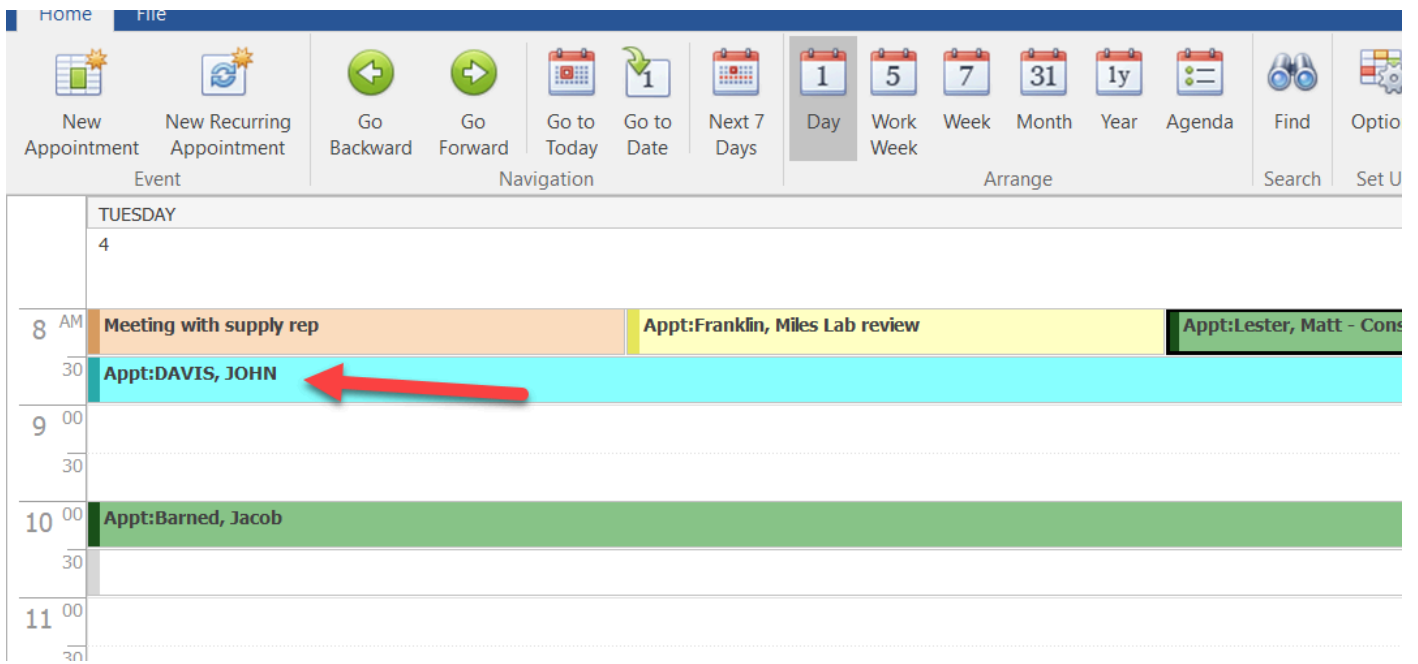
Look For:  In: **Name**

Drag a column header here to group by that:

- Name
- Date of Birth
- Account Num
- App Date
- Phone
- Cell
- Street
- City
- State
- ZipCode

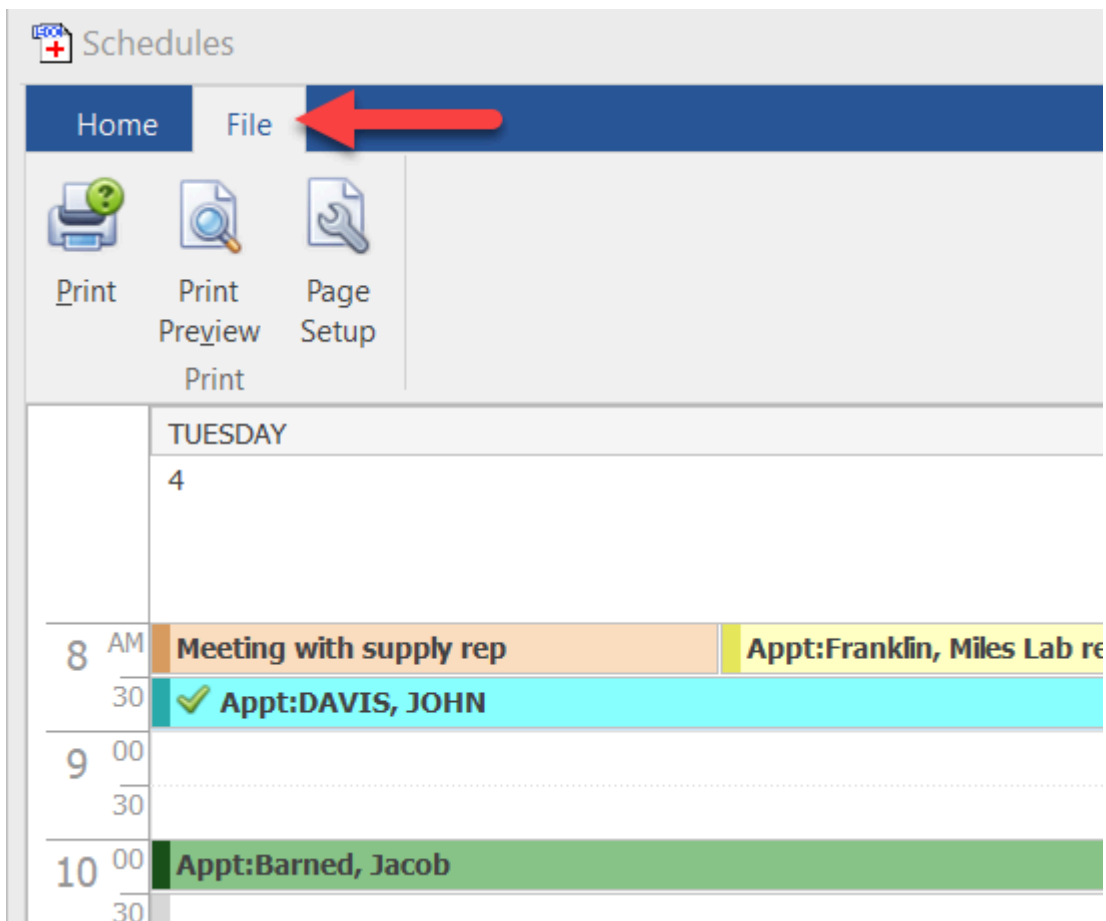
Name	Date of Birth	Account Num	App Date	Phone	Cell	Street	City	State	ZipCode
DON, FRED	10/27/1980	0000	2/27/2025 9:30:00 AM	4802861111		50 PARK DR	ALBANY	CA	95070
DON, FRED	10/27/1980	0000	2/27/2025 10:00:00 AM	4802861111		50 PARK DR	ALBANY	CA	95070
Franklin, Miles	12/21/1948	FRAM	2/27/2025 10:30:00 AM	3524555689	3524555689	147 Side St	Columbo	MA	12345
DAVIS, JOHN	7/12/1985	0000	2/27/2025 11:00:00 AM	0000000000		123 NO ADDRESS	ALBANY	CA	94706
Lester, Matt	5/15/2024	78979879	2/27/2025 11:30:00 AM	1234567877		456 Ave	Eustis	FL	32489
DAVIS, JOHN	7/12/1985	0000915	2/28/2025 8:15:00 AM	0000000000		123 NO ADDRESS	ALBANY	CA	94706
Lester, Matt	5/15/2024	78979879	3/4/2025 8:00:00 AM	1234567877		456 Ave	Eustis	FL	32489
Barker, Jihn	2/9/1976	BARJI919	3/4/2025 8:00:00 AM						
Franklin, Miles	12/21/1948	FRAMI221	3/4/2025 8:00:00 AM	3524555689	3524555689	147 Side St	Columbo	MA	12345
DAVIS, JOHN	7/12/1985	0000915	3/4/2025 8:30:00 AM	0000000000		123 NO ADDRESS	ALBANY	CA	94706
Barned, Jacob	3/2/2025	BARJA220	3/4/2025 10:00:00 AM	4564564654		456 South St	George	GA	44778
Franklin, Miles	12/21/1948	FRAMI221	3/13/2025 8:00:00 AM	3524555689	3524555689	147 Side St	Columbo	MA	12345
West, Jon	12/12/2020	WESJO212	3/13/2025 8:15:00 AM	4564654654	4566546546				
Matt Lester	5/6/2024	MATLE620	3/13/2025 9:00:00 AM						

Double-clicking on the appointment result will open that appointment and date on your scheduler.



### 2.1.6.6 Schedule Printing

Schedules can be printed by selecting File in the upper left.



## 2.1.6.1 Creating Appointment

Your scheduler is connected to your Speedy Claims Patient list. When you double click on a selected time or click on New Appointment, it will open your window to create an appointment.

Appointment - Untitled
- □ ×

Look For: 
In: Name ▼
Find Now

Drag a column header here to group by that column

Name	Street	City	St	ZipCode	Phone	Cell	Date of Birth	Account Num
▶ Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DON, FRED	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DAVIS, JOHN	123 NO ADDRESS	ALBANY	CA	94706	0000000000		7/12/1985	0000915
Franklin, Miles	147 Side St	Columbo	MA	12345	3524555689	3524555689	12/21/1948	FRAMI221
Barker, Jihn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919
Cole, Susan	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	123 St	Eustis	FL	32726	1231231311		5/1/2024	LESMA120
Scheduler, Test	789 SW Ave	Parker	MN	78798	1231231313	1231131321	2/2/220	SCHTE222

Patient Name **Lester, Matt**

DOB **05/15/2024**

Phone **1234567877**

Cell

Account No. **78979879**

Confirmed

---

Subject:

Location:  Label:  None ▼

---

Start time: 3/11/2025 ▼ 08:00 AM ▲▼  All day event

End time: 3/11/2025 ▼ 08:30 AM ▲▼

---

Reminder: 15 minutes ▼

In this section, you can select the patient, times, and assign label. Additional fields including location and notes can be entered here as well.

## 2.1.6.2 New Patient Appointment

If a patient has not been entered into Speedy Claims yet to your [Patient Table](#), you can select New Patient at the upper right.

Appointment - Untitled

Look For:  In: Name  Find Now Clear New Patient

Drag a column header here to group by that column

Name	Street	City	St	ZipCode	Phone	Cell	Date of Birth	Account Num
Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DON, FRED	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	456 Ave	Eustis	FL	32489	1234567877		5/15/2024	78979879
DAVIS, JOHN	123 NO ADDRESS	ALBANY	CA	94706	0000000000		7/12/1985	0000915
Franklin, Miles	147 Side St	Columbo	MA	12345	3524555689	3524555689	12/21/1948	FRAMI221
Barker, Jihn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919
Cole, Susan	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	123 St	Eustis	FL	32726	1231231311		5/1/2024	LESMA120
Scheduler, Test	789 SW Ave	Parker	MN	78798	1231231313	1231131321	2/2/220	SCHTE222

Load the provided fields to start the patient record setup and create the appointment.

New Patient

(Last Name, First Name, Middle Initial)

Name: Patient, New

Birth Date: 2/2/2001

Phone #: (321)321-2312

Cell #: ( ) -

Email: new@gmail.com

Account # (Box 76):

Save Cancel

After saving, the new patient will be saved to your [Patient Table](#) and you can continue creating the appointment. Added details on the new patient record will be updated to you [Patient Table](#) through claim creation or direct table update in Speedy Claims

Barker, Jihn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919
Patient, New					3213212312		2/2/2001	PATNE220
Cole, Susan	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	123 St	Eustis	FL	32726	1231231311		5/1/2024	LESMA120

Patient Name Patient, New

DOB 02/02/2001

Phone 3213212312

Cell

Account No. PATNE220

Confirmed

Subject: Appt:Patient, New

Location: Label:  None

After saving, the new patient will be saved to your [Patient Table](#) and you can continue creating the appointment. Added details on the new patient record will be updated to you [Patient Table](#) through claim creation or direct table update in Speedy Claims

Barker, Jihn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919
▶ Patient, New					3213212312		2/2/2001	PATNE220
Cole, Susan	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Lester, Matt	123 St	Eustis	FL	32726	1231231311		5/1/2024	LESMA120

Patient Name Patient, New  
 DOB 02/02/2001  
 Phone 3213212312  
 Cell  
 Account No. PATNE220  
 Confirmed

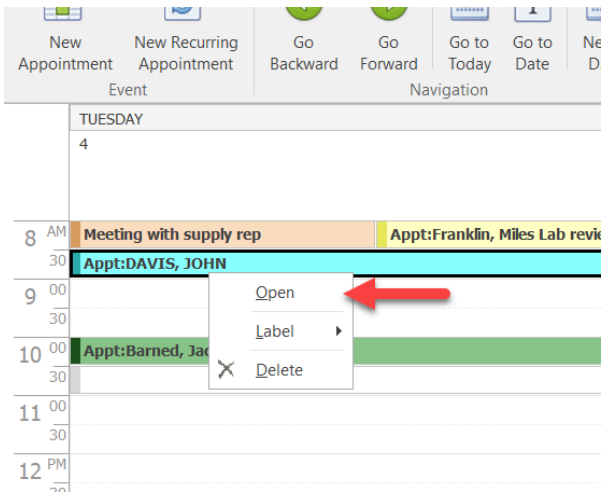
---

Subject:

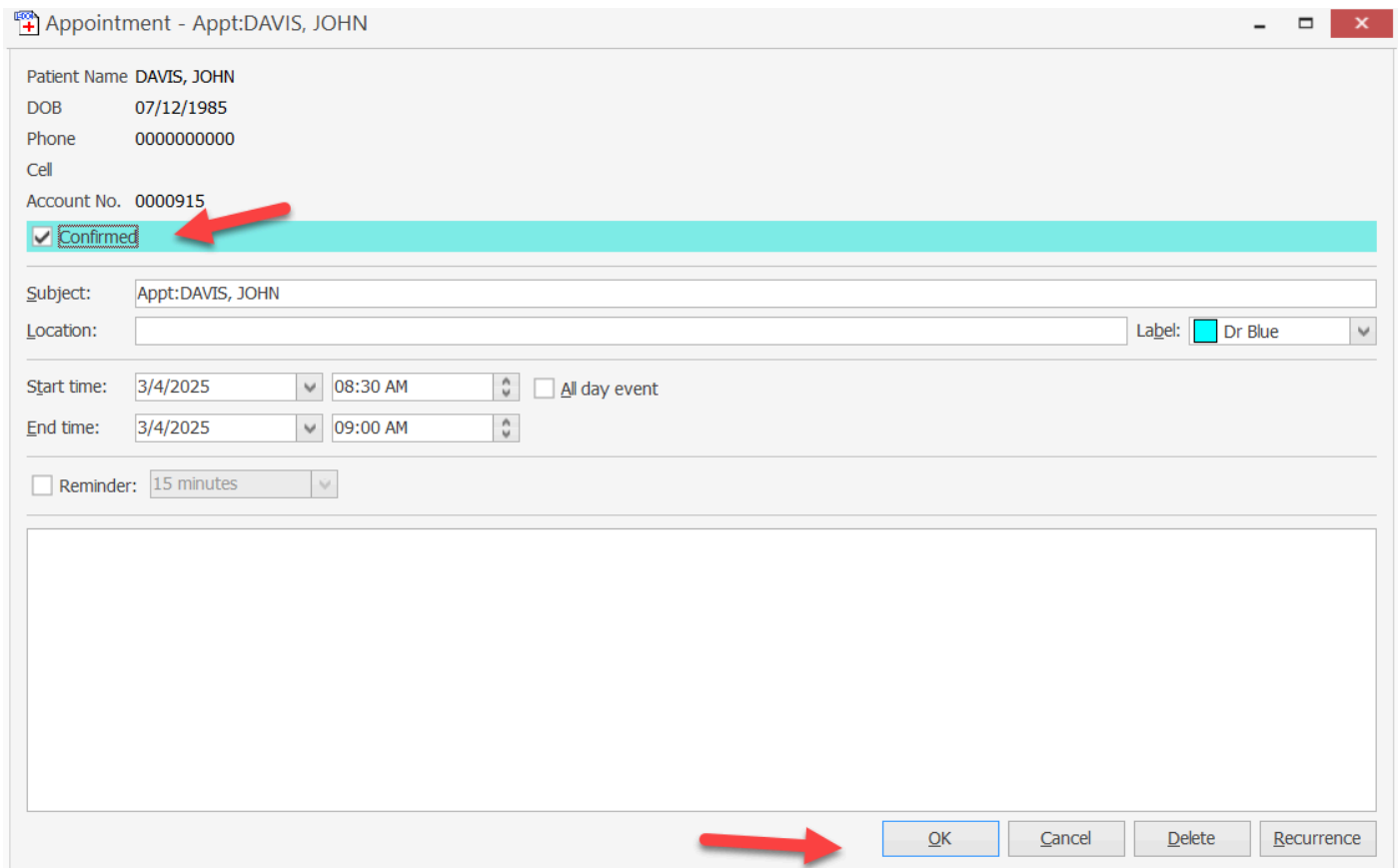
Location:  Label:  None ▼

## 2.1.6.3 Confirming Appointment

Existing appointments can be opened directly from your scheduler screen with either a double click or right-click, and selecting open.

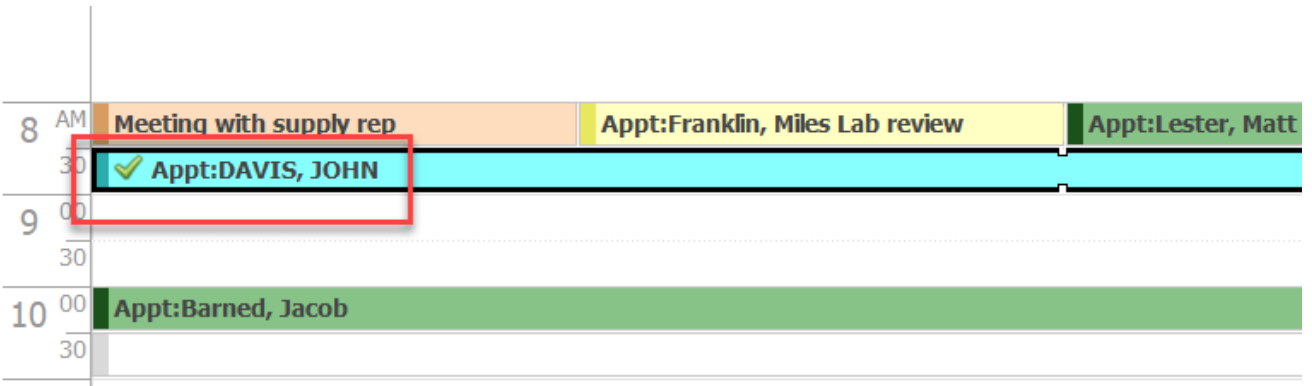


This will pull up the appointment details. There is a Confirmed check box as well. To confirm an appointment, check the box and click OK below.



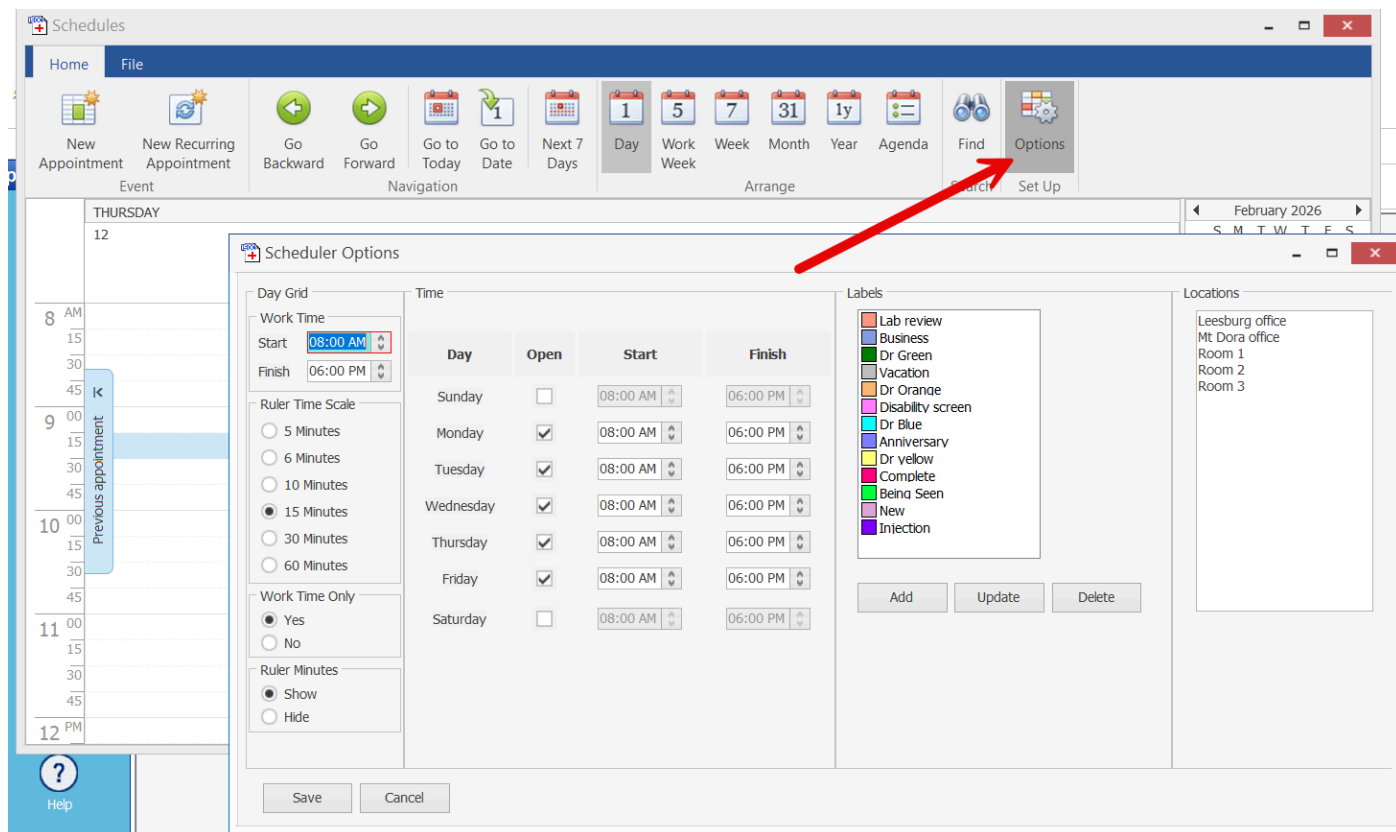
The screenshot shows the 'Appointment - Appt:DAVIS, JOHN' details window. The patient information is: Patient Name: DAVIS, JOHN; DOB: 07/12/1985; Phone: 0000000000; Cell: ; Account No.: 0000915. A 'Confirmed' checkbox is checked and highlighted in cyan, with a red arrow pointing to it. The subject is 'Appt:DAVIS, JOHN'. The location is empty, and the label is 'Dr Blue'. The start time is 3/4/2025 at 08:30 AM, and the end time is 3/4/2025 at 09:00 AM. The 'All day event' checkbox is unchecked. The reminder is set to 15 minutes. At the bottom, there are buttons for 'OK', 'Cancel', 'Delete', and 'Recurrence'. A red arrow points to the 'OK' button.

You will now see a check by the confirmed appointment on your main schedule screen.



## 2.1.6.4 Options / Setup

By clicking on Options on the upper right, you get your setup window to manage your schedule hours, display, custom labels, and locations.



The Day Grid will be where you set up your default work time and display options.

The Time section in the middle can be used to customize set days and hours. In the example above, We have Saturday and Sunday selected as closed days. We also have Wednesdays set as early days ending at 1:00

In the Labels section, labels can be created and edited to suit your practice's specific needs. These helpful, color-coded labels make it easier to manage your schedule at a glance by indicating the purpose of an appointment or the physician's name by the assigned color.

In the Locations section, a list of default locations can be loaded. They will appear on a dropdown when creating your appointment. Any location that is not on your list can be entered as well.

DON, FRED	50 PARK DR	ALBANY	CA	95070	4802861111		10/27/1980	0000753
Loopy, Other N	123 St	City	FL	12345	1231213123		7/6/2025	LOOOT620
DAVIS, JOHN	123 Franklin Ave	ALBANY	CA	94706	0000000000		7/12/1985	0000915
Franklin, Miles	147 Side St	Columbo	MA	12345	3524555689	3524555689	12/21/1948	FRAMI221
Barker, Jhn	785 West Bend	Mointain	NC	78978		1231232123	2/9/1976	BARJI919

Patient Name **Lester, Matt** Account No. **78979879**

DOB **5/15/2024** Phone **1234567877** Cell

Confirmed

Subject: Lester, Matt

Location: Leesburg office  
 Start time: Mt Dora office  
 End time: Room 1

Label:  None

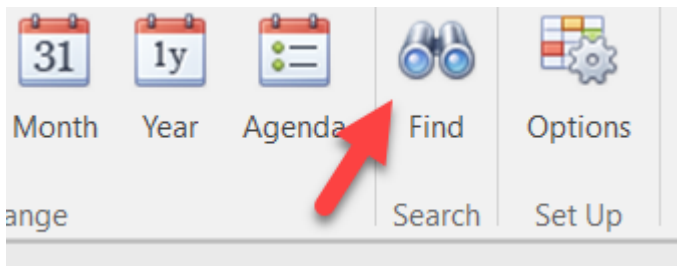
All day event

Reminder: 15 minutes

OK Cancel Delete Recurrence

## 2.1.6.5 Appointment Lookup

The Find button will pull up a search field to allow you to look up appointments created in your scheduler.



The search can be done by looking up details from any of the selected fields shown below.

A screenshot of a window titled 'Events Search'. At the top, there is a search bar with 'Look For:' and a dropdown menu currently set to 'Name'. To the right of the dropdown are 'Find Now' and 'Clear' buttons. Below the search bar is a table with columns: Name, Date of Birth, Account Number, App Date, Phone, Cell, Street, City, State, and ZipCode. A dropdown menu is open from the 'Name' dropdown, listing various fields: Name, Date of Birth, Account Num, App Date, Phone, Cell, Street, City, State, and ZipCode. The table contains several rows of appointment data, with the row for 'DAVIS, JOHN' on 3/4/2025 at 8:30:00 AM highlighted in blue. A red arrow points to the 'Name' dropdown menu.

Name	Date of Birth	Account Num	App Date	Phone	Cell	Street	City	State	ZipCode
DON, FRED	10/27/1980	0000	2/27/2025 9:30:00 AM	4802861111		50 PARK DR	ALBANY	CA	95070
DON, FRED	10/27/1980	0000	2/27/2025 10:00:00 AM	4802861111		50 PARK DR	ALBANY	CA	95070
Franklin, Miles	12/21/1948	FRAM	2/27/2025 10:30:00 AM	3524555689	3524555689	147 Side St	Columbo	MA	12345
DAVIS, JOHN	7/12/1985	0000	2/27/2025 11:00:00 AM	0000000000		123 NO ADDRESS	ALBANY	CA	94706
Lester, Matt	5/15/2024	78979879	2/27/2025 11:30:00 AM	1234567877		456 Ave	Eustis	FL	32489
DAVIS, JOHN	7/12/1985	0000915	2/28/2025 8:15:00 AM	0000000000		123 NO ADDRESS	ALBANY	CA	94706
Lester, Matt	5/15/2024	78979879	3/4/2025 8:00:00 AM	1234567877		456 Ave	Eustis	FL	32489
Barker, Jihn	2/9/1976	BARJI919	3/4/2025 8:00:00 AM						
Franklin, Miles	12/21/1948	FRAMI221	3/4/2025 8:00:00 AM	3524555689	3524555689	147 Side St	Columbo	MA	12345
DAVIS, JOHN	7/12/1985	0000915	3/4/2025 8:30:00 AM	0000000000		123 NO ADDRESS	ALBANY	CA	94706
Barned, Jacob	3/2/2025	BARJA220	3/4/2025 10:00:00 AM	4564564654		456 South St	George	GA	44778
Franklin, Miles	12/21/1948	FRAMI221	3/13/2025 8:00:00 AM	3524555689	3524555689	147 Side St	Columbo	MA	12345
West, Jon	12/12/2020	WESJO212	3/13/2025 8:15:00 AM	4564654654	4566546546				
Matt Lester	5/6/2024	MATLE620	3/13/2025 9:00:00 AM						

Double-clicking on the appointment result will open that appointment and date on your scheduler.



## 2.1.6.6 Schedule Printing

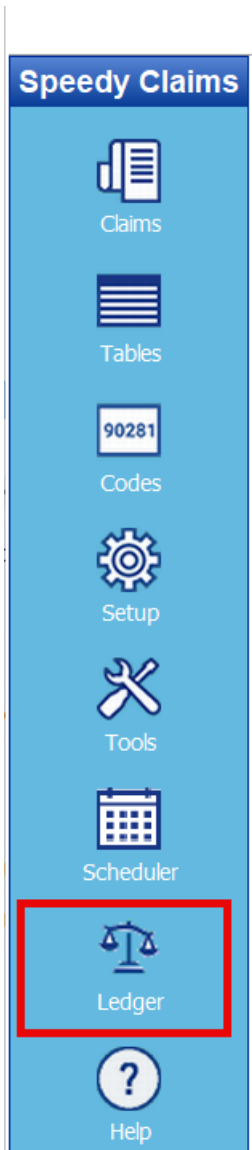
Schedules can be printed by going to File in the upper left.

The screenshot shows the 'Schedules' application window. At the top, there is a ribbon with two tabs: 'Home' and 'File'. A red arrow points to the 'File' tab. Below the ribbon, there are three icons: a printer icon labeled 'Print', a magnifying glass icon labeled 'Print Preview', and a wrench icon labeled 'Page Setup'. Below these icons, there is a list of appointments for 'TUESDAY'. The appointments are:

- 8 AM: Meeting with supply rep (orange bar)
- 8:30 AM: Appt:Franklin, Miles Lab re (yellow bar)
- 8:30 AM: ✓ Appt:DAVIS, JOHN (cyan bar)
- 9:00 AM: (empty)
- 9:30 AM: (empty)
- 10:00 AM: Appt:Barned, Jacob (green bar)
- 10:30 AM: (empty)

## 2.1.7 Ledger

The Ledger is included in the 30-day trial of Speedy Claims. If you subscribe to the Speedy Claims Suite, this function will appear in your registered Speedy Claims as well.



## 2.1.7.1 Ledger Settings



You will want to complete your Ledger Settings before creating any statements. This is where you will enter your bill customization. The information here is what will be displayed on the statements you make in Ledger. The Ledger Customization on the left side is already set to the program's defaults and can be changed if desired.

### Settings

Need Help? [1-844-267-1500](tel:1-844-267-1500) Free Support!

**INFORMATION : CHANGES ARE SAVED AUTOMATICALLY**

#### Ledger Customization

**Panel**

Insurance :  Show  Hide

Patient :  Show  Hide

Totals :  Show  Hide

**Column Header Filter**

Filter Option :  Show  Hide

Header :  Patient Name  Insurance Name  
 Deductible  Co-Payment  
 CPT/HCPCS

\*\*\*\*\*

**Set CoPayment's Date**


Today's Date (Default)  Date Of Service

**Set Auto-Fill Date**

Yes (Default)  No

#### Bill Customization

**Header**

Logo : 

Name : SpeedySoft USA

Address : 123 Street

City : Eustis State : FL Zip : 12345

Phone : (125)457-4444

\*\*\*\*\*

Terms : Due On Receipt

Notes : Thank

Custom Message: To Pay, please visit payus.com

Info : SpeedySoft USA | 123 Street Eustis FL 12345 (1)

You can add your logo to your bill customization as well. This is optional. Logo image specs are as follows.

The max dimensions are:

maxWidth = 192;

maxHeight = 96;

image file types:

.jpg, .jpeg, .bmp

## 2.1.7.2 Ledger Claim List



The Claims List in your Ledger displays claims much like the list in your main Speedy Claims. It has an added column for Ledger Status. This shows the claim's ledger status as payments are entered into your Ledger Payments.

### Claims List

Need Help? 1-844-267-1500 Free Support!

Look For:  In: Patient Name    Include Inactive Claims  Include Paid Claims The Selected claim is : \*

Drag a column header here to group by that column

Ledger Status	Patient Name	Date of Service	Create Date	Status	Total Charge	Provider
Secondary Insurance Payment Entered	Murray, Mark	10/24/2025	10/27/2025 7:00	FORM	\$100.00	Lake Primary Care
Primary Insurance Payment Entered	Murray, Mark	9/29/2025	10/2/2025 11:00	SAVE	\$250.00	Lake Primary Care
Primary Insurance Payment Entered	Flintstone, Fred	7/4/2025	7/4/2025 10:40	SAVE	\$875.00	Lake Primary Care
Patient Payment Entered	Franklin, Miles	7/11/2025	9/30/2025 10:00	SAVE	\$550.00	Billing Provider
Patient Payment Entered	Franklin, Miles	8/5/2025	9/30/2025 10:00	ANSI	\$1,350.00	Billing Provider
Patient Payment Entered	Alfred, Brown	7/1/2025	7/29/2025 12:00	ANSI	\$500.00	Lake Primary Care
Patient Payment Entered	Flintstone, Fred	7/4/2025	8/8/2025 6:07	ANSI	\$875.00	Marc Cooper, MD
Claim needs Payment Data or EOB.	Franklin, Miles	9/10/2025	10/30/2025 6:00	SAVE	\$150.00	Billing Provider
Claim needs Payment Data or EOB.	Franklin, Miles	7/11/2025	10/30/2025 7:00	SAVE	\$550.00	Billing Provider
Claim needs Payment Data or EOB.	Murray, Mark	10/22/2025	10/22/2025 10:00	ANSI	\$0.00	Lake Primary Care
Claim needs Payment Data or EOB.	Flintstone, Fred	10/22/2025	10/22/2025 11:00	SAVE	\$875.00	Lake Primary Care

From this list, you can easily navigate to the Ledger Payments section for payment posting and statement creation. You can also open the CMS-1500 claim in edit mode from this list. Double-clicking opens the desired entry in the Ledger Payment section.

If you highlight a claim line entry here, you will see the options to open in [Ledger Payments](#) or open the [claim](#) in edit mode.

main | reports | settings

Open Ledger Open Claim Cut Copy Paste Export

## Claims List Need Help

Look For:  In: Patient Name Find Now Clear  Include Inactive Claims  Include

Drag a column header here to group by that column

Ledger Status	Patient Name	Date of Service	Create Date	St
Secondary Insurance Payment Entered	Murray, Mark	10/24/2025	10/27/2025 7:00	FORM
Primary Insurance Payment Entered	Murray, Mark	9/29/2025	10/2/2025 11:00	SAVE
Primary Insurance Payment Entered	Flintstone, Fred	7/4/2025	7/4/2025 10:40	SAVE
Patient Payment Entered	Franklin, Miles	7/11/2025	9/30/2025 10:00	SAVE
Patient Payment Entered	Franklin, Miles	8/5/2025	9/30/2025 10:00	ANSI
Patient Payment Entered	Alfred, Brown	7/1/2025	7/29/2025 12:00	ANSI
Patient Payment Entered	Flintstone, Fred	7/4/2025	8/8/2025 6:07	ANSI
Claim needs Payment Data or EOB.	Franklin, Miles	9/10/2025	10/30/2025 6:00	SAVE

Right-clicking a claim line entry displays the payment data entered in the Ledger, along with options to open the claim in Ledger payments or in the CMS-1500 claim.

## Claims List Need Help

Look For:  In: Patient Name Find Now Clear  Include Inactive Claims  Include

Drag a column header here to group by that column

Ledger Status	Patient Name	Date of Service	Create Date	St
Secondary Insurance Payment Entered	Murray, Mark	10/24/2025	10/27/2025 7:00	FORM
Primary Insurance Payment Entered	Murray, Mark	9/29/2025	10/2/2025 11:00	SAVE
Primary Insurance Payment Entered	Flintstone, Fred	7/4/2025	7/4/2025 10:40	SAVE
Patient Payment Entered	Franklin, Miles	7/11/2025	9/30/2025 10:00	SAVE
Patient Payment Entered	Franklin, Miles	8/5/2025	9/30/2025 10:00	ANSI
Patient Payment Entered	Alfred, Brown	7/1/2025	7/29/2025 12:00	ANSI
Patient Payment Entered	Flintstone, Fred	7/4/2025	8/8/2025 6:07	ANSI
Claim needs Payment Data or EOB.	Franklin, Miles	9/10/2025	10/30/2025 6:00	SAVE

Payment Information Name : **Murray, Mark**

Insurance Payments

Primary: **\$50.00** Secondary: **\$35.00** Allowed Amount: **\$100.00**

Patient Payments:

CoPay: Payment: Adjustment:

Open Ledger Open Claim

### Ledger (Payments)

Ledger Payments is the main component of your Speedy Claims Ledger for posting payments and generating your statements. The top section is for entering EOB information, including your insurance-allowed amount, payments, and dates. The bottom half is for patient payments and adjustments. The option to Create Statement is located at the lower right of this page.



CMS1500 Overview (Box 24->30) Ledger (Payments) Patient Information

Column Filter (Show/Hide) Hide

CPT/HCPCS  Patient Name  Deductible  Co-Payment  Insurance Name

Line	CPT/HCPCS	Date Of Service	Charges	Allowed Amount	Provider Discount	Primary Ins.	Date (Primary Ins.)	Deductible	BALANCE
1	1127F	9/10/2025	\$150.00						\$0.00 N/A N/A N/A N/A N/A
			\$150.00	\$0.00	\$0.00	\$0.00		\$0.00	

Copayment/Coinsurance	Date (Copayment)	Payment	Date (Payment)	Adjustment	Patient Name	Insurance Name	PATIENT BALANCE
					Franklin, Miles	Champva	\$0.00
		\$0.00	\$0.00	\$0.00			

Add Payment Delete Payment

Primary Insurance : **Champva**  
Secondary Insurance : **No**

Notes

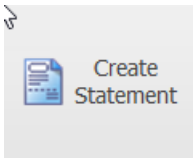
Reset Payment

Paid  Yes  No

Statement History

Create Statement

I have entered the insurance payment details for this claim and selected the Create Statement option.



When selecting to Create Statement, a patient statement will appear for the claim that you were working on in the Ledger Payments section.

Below is an example of a patient statement. There are options at the top to customize your statement by adding or removing specific fields.



(125)457-4444

Invoice # :	14
Patient # :	78979879

att

FL

Speedy Claims ×

Statement #14 Saved

OK

Due On Receipt

Due	Amount Paid
\$0.00	\$0.0

Payment Information type:  Check  Visa  Mastercard

Name on Card : \_\_\_\_\_

Card Number : | | | | | | | | | | | | | | | | | | | | | |

Exp. Date : \_\_\_\_\_ CCV (3 Digi security Code) | | |

Payment to Insure Proper Posting

## 2.1.7.2.1 Ledger Payments

### Ledger (Payments)

Ledger Payments is the main component of your Speedy Claims Ledger for posting payments and generating your statements. The top section is for entering EOB information, including your insurance-allowed amount, payments, and dates. The bottom half is for patient payments and adjustments. The option to Create Statement is located at the lower right of this page.

Ledger - Franklin, Miles Need Help? 1-844-267-1500 Free Support!

CMS1500 Overview (Box 24->30) | Ledger (Payments) | Patient Information

Column Filter (Show/Hide) Hide

CPT/HCPCS  Patient Name  Deductible  Co-Payment  Insurance Name

Line	CPT/HCPCS	Date Of Service	Charges	Allowed Amount	Provider Discount	Primary Ins.	Date (Primary Ins.)	Deductible	BALANCE
1	1127F	9/10/2025	\$150.00						\$0.00
									N/A
									N/A
									N/A
									N/A
									N/A
									N/A
				\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	

Copayment/Coinsurance	Date (Copayment)	Payment	Date (Payment)	Adjustment	Patient Name	Insurance Name	PATIENT BALANCE
					Franklin, Miles	Champva	\$0.00
		\$0.00	\$0.00	\$0.00			

Add Payment | Delete Payment

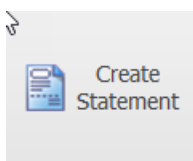
Primary Insurance : **Champva**  
Secondary Insurance : **No**

Notes

Reset Payment  Yes  No

Statement History

I have entered the insurance payment details for this claim and selected the Create Statement option.



When selecting to Create Statement, a patient statement will appear for the claim that you were working on in the Ledger Payments section.

Below is an example of a patient statement. There are options at the top to customize your statement by adding or removing specific fields.



(125)457-4444

Invoice # :	14
Patient # :	78979879

att

FL

Speedy Claims

Statement #14 Saved

OK

Due On Receipt

Due	Amount Paid
\$0.00	\$0.0

Payment Information type:  Check  Visa  Mastercard

Name on Card : \_\_\_\_\_

Card Number : \_\_\_\_\_

Exp. Date : \_\_\_\_\_ CCV (3 Digi security Code) \_\_\_\_\_

Payment to Insure Proper Posting

## 2.1.7.2.2 Self-Pay Patients

There may be situations in which patients are not billed to insurance and are self-pay. For your Ledger to show these charges, a claim will be required first. It does not need to be completed in full, such as a standard insurance claim. At a minimum, you would want to include the patient's name, service dates, and charges. To track them more easily, you can also create an insurance record in your Speedy Claims insurance table to use for the claim in the insurance name field. A good example would be Self-Pay.

The screenshot shows a claim form with the following fields and annotations:

- At the top left, there is a checkbox labeled "PM Use 4 Digit Service Year on Forms" and a button labeled "Make Secondary Claim".
- Below this, there is a "Payor ID" field and a "Self-Pay" field. A red arrow points from the "Self-Pay" field to the "Payor ID" field.
- To the right of the "Self-Pay" field, there is a vertical red double-headed arrow labeled "CARRIER".
- The form is divided into several sections:
  - PLAN:** Includes checkboxes for "FECA EXCLUSION (DD)", "OTHER (DD)", and "1a. INSURED'S I.D. NUMBER (For Program in Item 1)".
  - IRTH DATE:** Includes a dropdown menu for the month (set to "8") and a checkbox for "SEX" (set to "M").
  - 4. INSURED'S NAME:** The name "Asher, Mark" is entered.
  - 7. INSURED'S ADDRESS:** A red box highlights the address field.
  - RELATIONSHIP TO INSURED:** Includes checkboxes for "Child" and "Other".
  - OR NUCC USE:** Includes fields for "CITY" and "STATE".

By doing this, it will show all your self-pay patients in searches of your Claim List and Global Report.

To post self-pay payments in Ledger

The responsibility for payment will start with the insurance company in your Ledger. To push the total balance to the patient's responsibility, follow these easy steps.

This is a self-pay patient with a \$250.00 charge for services. To transfer the full charge balance to the patient's responsibility, enter 100% of the charge for the allowed amount on the insurance payment line, then enter 00.00 for the payment amount. This will now show the balance in the Patient section.

Ledger - Asher, Mark

Need Help? 1-844-267-1500 Free Support!

CMS1500 Overview (Box 24->30) Ledger (Payments) Patient Information

Column Filter (Show/Hide)  
CPT/HCPCS Patient Name Deductible Co-Payment Insurance Name

Line	CPT/HCPCS	Date Of Service	Charges	Allowed Amount	Provider Discount	Primary Ins.	Date (Primary Ins.)	Deductible	BALANCE
1		6/10/2025	\$250.00	\$250.00	\$0.00	\$0.00	1/21/2026		\$250.00
									N/A
									N/A
									N/A
									N/A
									N/A
									N/A
			\$250.00	\$250.00	\$0.00	\$0.00		\$0.00	

INSURANCE

Copayment/Coinsurance	Date (Copayment)	Payment	Date (Payment)	Adjustment	Patient Name	Insurance Name	PATIENT BALANCE
							\$250.00

PATIENT

<No Patient Payment to display - Click the Add Payment button to add a payment>

Add Payment Delete Payment

Primary Insurance : Self-Pay

Click Add Payment at the bottom left to enter the patient payments you receive.

Ledger - Asher, Mark

Need Help? 1-844-267-1500 Free Support!

CMS1500 Overview (Box 24->30) Ledger (Payments) Patient Information

Column Filter (Show/Hide)  
CPT/HCPCS Patient Name Deductible Co-Payment Insurance Name

Line	CPT/HCPCS	Date Of Service	Charges	Allowed Amount	Provider Discount	Primary Ins.	Date (Primary Ins.)	Deductible	BALANCE
1		6/10/2025	\$250.00	\$250.00	\$0.00	\$0.00	1/21/2026		\$250.00
									N/A
									N/A
									N/A
									N/A
									N/A
									N/A
			\$250.00	\$250.00	\$0.00	\$0.00		\$0.00	

INSURANCE

Copayment/Coinsurance	Date (Copayment)	Payment	Date (Payment)	Adjustment	Patient Name	Insurance Name	PATIENT BALANCE
		\$250.00	1/21/2026		Asher, Mark		\$0.00

PATIENT

\$0.00 \$250.00 \$0.00

Add Payment Delete Payment

Primary Insurance : Self-Pay

The Add Payment button can be used to create additional payment lines if the patient is making multiple payments towards the balance.

Copayment/Coinsurance	Date (Copayment)	Payment	Date (Payment)	Adjustment	Patient Name	Insurance Name	<b>PATIENT BALANCE</b>
		\$50.00	6/10/2025		Asher, Mark		
		\$50.00	7/10/2025		Asher, Mark		
		\$50.00	8/12/2025		Asher, Mark		
		\$50.00	9/10/2025		Asher, Mark		
		\$0.00	\$200.00	\$0.00			

PATIENT

Add Payment    Delete Payment

## 2.1.7.3 Patient Statement List



The Patient Statement List stores your saved patient statements. From here, you can easily return to the [Ledger Payments](#) section to enter patient payments you have received.

Need Help? 1-844-267-1500 Free Support!

Look For:  In: Statement

Drag a column header here to group by that column

Statement	Patient Name	Provider Name	Date	Balance	Total Payments	Total Charges	Total Allowed Amount	Total Provider Discount	Total Primary Insurance Payment	Total Secondary Insurance Payment	Total Deductible
1	Franklin, Miles	Matty D	9/30/2025	\$75.00	\$400.00	\$550.00	\$475.00	\$75.00	\$400.00	\$0.00	\$0.00
3	Alfred, Brown	Matty D	10/1/2025	\$135.00	\$215.00	\$500.00	\$350.00	\$150.00	\$175.00	\$0.00	\$25.00
4	Franklin, Miles	Matty D	10/2/2025	\$55.00	\$420.00	\$550.00	\$475.00	\$75.00	\$400.00	\$0.00	\$0.00
5	Lester, Matt	Matty D	10/2/2025	(\$50.00)	\$50.00	\$600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	Employee, boss	SpeedySoft USA	12/3/2025	\$85.00	\$265.00	\$500.00	\$350.00	\$150.00	\$175.00	\$0.00	\$25.00
7	Employee, boss	SpeedySoft USA	12/3/2025	\$85.00	\$265.00	\$500.00	\$350.00	\$150.00	\$175.00	\$0.00	\$25.00

Patient statements can be reviewed, printed, and exported from here as well. If you have a clearinghouse that processes statements, there is an ECH function to create a Print Image file for electronic submission.

Right-clicking a saved statement gives a selection to go to the [Ledger Payments](#) section. This is a quick way to post a patient payment for a selected statement. Once a statement has been paid, you can delete it from the list if it is no longer needed.

### Patient Statement List

Look For:  In: Statement

Drag a column header here to group by that column

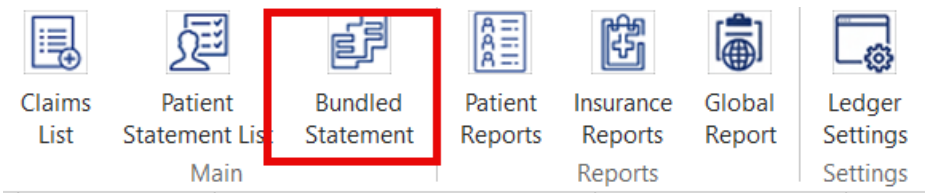
Statement	Patient Name	Provider Name	Date	Balance	Total Payment
1	Franklin, Miles	Matty D	9/30/2025	\$75.00	\$400.00
3	Alfred, B	Matty D	10/1/2025	\$135.00	\$215.00
4	Franklin,		10/2/2025	\$55.00	\$420.00
5	Lester, M		10/2/2025	(\$50.00)	\$50.00
6	Employee		12/3/2025	\$85.00	\$265.00
7	Employee		12/3/2025	\$85.00	\$265.00
8	Employee, boss	SpeedySoft USA	12/3/2025	\$85.00	\$265.00
9	Lester, Matt	SpeedySoft USA	12/3/2025	\$25.00	\$75.00
10	Lester, Matt	SpeedySoft USA	12/3/2025	\$25.00	\$75.00
11	Loopy, Other	SpeedySoft USA	12/4/2025	\$15.00	\$225.00

Context menu for statement 3:

- Print Ctrl+P
- Delete Ctrl+Del
- Ledger Payments



## 2.1.7.4 Bundled Statement



The Bundled Statement allows you to create a statement that combines multiple dates of service from various claims. This function differs from your Create Statement option in the [Ledger Payments](#) section, which creates a statement for that individual claim.

The Bundled Statement feature is widely used for billing a group of service dates and charges in a single statement to legal teams for auto or other accidents.

In this example, I have pulled up all the service dates for a specific patient. All have been highlighted, and I will select to print.

The screenshot shows the 'Bundled Statement' interface. At the top, there is a navigation menu with 'Bundled Statement' selected. Below the menu are 'Print' and 'Export' buttons. The main header includes 'Need Help? 1-844-267-1500 Free Support!'. The search area shows 'Look For: Lester' and 'In: Patient Name'. A red arrow points to the search input field. Below the search area, there is a table with columns: Date Of Service, DateOfBilling, Patient Name, Insurance Name, is Paid?, is Active?, Line, Procedure Code, and Charges. The table contains 12 rows of data, all of which are highlighted in blue. A red arrow also points to the first row of the table.

Date Of Service	DateOfBilling	Patient Name	Insurance Name	is Paid ?	is Active ?	Line	Procedure Code	Charges
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$100.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	99999		\$1,000.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$500.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$100.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$100.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$100.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$4,008.96
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$200.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$1,200.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	45454		\$100.00
8/26/2025	2/21/2025 12:06	Lester, Matt	Insurance 1	N	Y	77776		\$1,200.00

Below is a preview of the Bundled Statement I have selected to print. This statement can be as many pages as needed, depending on the number of service dates you choose to include.

Remit payment to :  
 Matty D  
 123 Street  
 Eustis FL 12345  
 (125)457-4444

## Patient Statement

Date :	11/24/2025
Invoice # :	1
Patient # :	78979879

Bill To :
Lester, Matt 456 Ave Eustis FL 32489

Terms :	Due On Receipt
---------	----------------

Amount Due	Amount Paid
\$8608.96	

Detach and Rem it with Payment to Insure Proper Post

Date of Service	Procedure Code	Description of Service	Charge Amount	Allowed Amount	Primary Insurance Payment	Secondary Insurance Payment	Deductible
8/28/2025	45454		\$100.00				
8/28/2025	45454		\$4,008.96				
8/28/2025	45454		\$100.00				
8/28/2025	45454		\$100.00				
8/28/2025	45454		\$100.00				
8/28/2025	45454		\$100.00				
8/28/2025	45454		\$1,200.00				
8/28/2025	45454		\$200.00				
8/28/2025	99999		\$1,000.00				
8/28/2025	45454		\$500.00				
8/28/2025	77776	INTERSTITIAL	\$1,200.00				

Total	\$8608.96
Provider Discount	\$0.00
Payments	\$0.00
Balance Due	\$8608.96

0 - 30 Days Current	31 - 60 Days Past Due	61 - 90 Days Past Due	91 - 120 Days Past Due	>120 Days Past Due
\$8608.96	\$0.00	\$0.00	\$0.00	\$0.00

Notes : Thank  
 Pages : 1 of 1

THANK YOU

Matty D 123 Street Eustis FL 12345 (125)457-4444

The Description of Service field here will load for procedure codes you have pulled from your [Procedure Codes Library](#), which includes a description when you are filling out your initial CMS 1500 claim.



## 2.1.7.5 Patient Reports



The Patient Reports have an option to search patient balances in either the Amount Outstanding or Balance Due report. Patient balances in the Aging Report do not begin until the insurance payment is posted and the Patient Statement is created. There is a column for Unbilled Amount that reflects patient balances that have not been saved in a statement.

### Example Patient Aging Report

Patient Report Need Help? 1-844-267-1500 Free Support!

Patient Aging Report

Select Patient:

Patient Name	Date Of Invoice Created	Current Date	Amount unbilled	0-30 days	31 - 60 Days	61 - 90 Days	91 - 120 Days	over 120 Days	Total
▶ Patient Name : Alfred, Brown (Amount Outstanding : \$85.00, Last Invoice Date :12/3/2025, Claims : 1)									
			\$0.00	\$85.00	\$0.00	\$0.00	\$0.00	\$0.00	\$85.00
▶ Patient Name : Flintstone, Fred (Amount Outstanding : \$165.00, Last Invoice Date :12/13/2025, Claims : 2)									
			\$15.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$165.00
▶ Patient Name : Franklin, Miles (Amount Outstanding : \$130.00, Last Invoice Date :12/13/2025, Claims : 3)									
			\$130.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$130.00

### Example Patient Amount Outstanding Report

# Patient Report

Need Help? 1-844-26

Amount Outstanding Report

Select Patient:

Patient Name	Last Date of Ser
▶ Patient Name : Alfred, Brown (Claims : 1, Amount Outstanding : \$85.00)	
▶ Patient Name : Flintstone, Fred (Claims : 2, Amount Outstanding : \$165.00)	
▶ Patient Name : Franklin, Miles (Claims : 3, Amount Outstanding : \$130.00)	
▶ Patient Name : Loopy, Other (Claims : 1, Amount Outstanding : \$15.00)	
▶ Patient Name : Loopy, Other N (Claims : 1, Amount Outstanding : \$100.00)	
▶ Patient Name : Murray, Mark (Claims : 1, Amount Outstanding : \$15.00)	

Individual patients can be looked up to print a specific report for that patient.

Main | Reports | Settings

Print

Patient Report

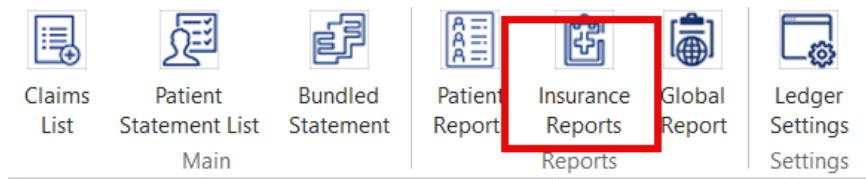
Need Help? 1-844-267-1500 Free Support!

Patient Aging Report



Select Patient:

Patient Name	Date Of Invoice Created	Current Date	Amount unbilled	0-30 days	31 - 60 Days	61 - 90 Days	91 - 12
▶ Patient Name : Alfred, Brown (Amount Outstanding : \$85.00, Last Invoice Date :12/3/2025, Claims : 1)							
Alfred, Brown	12/3/2025	12/12/2025	\$0.00	\$85.00	\$0.00	\$0.00	
			\$0.00	\$85.00	\$0.00	\$0.00	

## 2.1.7.6 Insurance Reports



The Insurance Reports work very similarly to the Patient Reports. The key difference is that their results are for insurance balances. There is also an Insurance Activity report. That includes a breakdown of service dates, charges, and payment data.

### Insurance Report Need Help? 1-844-267-1500 Free Support!

**Aging Report**

**Amount Outstanding**

**Insurance Activity Report**

**Activity Report**

Select a Insurance from the list :

- Name
- Auto
- Champva
- Cheap Rates
- Dewey, Cheetem & Howe
- High Priced Insurance
- Insurance 1
- Insurance 2
- KAISER BRONZE 60 DHMO
- PARTNERSHIP HP
- White Cross

Street : **8 Lost Lane**

City : **Carter** State : **KS** Zip : **88073**

Phone : **(807)345-8475**

Drag a column header here to group by that column

Patient Name	Date Of Service	Date Of Billing	Charges	Adjustment	Balance	Primary Pd	Date Primary	Seco
Lester, Matt	5/3/2024	2/7/2024	\$300.00	\$50.00	\$100.00	\$200.00	5/30/2024	
Lester, Matt	5/2/2024	2/7/2024	\$200.00	\$50.00	\$100.00	\$125.00	5/30/2024	
Lester, Matt	3/1/2024	2/7/2024	\$123.00	\$23.00	\$100.00	\$75.00	5/30/2024	

## 2.7.1.7 Global Report



The Global Report records all charges and payments posted to your claims, both for insurance and for patients, along with the amounts collected and when. It has a dual search function at the top that enables a custom report that can be printed or exported.

The dual search filters allows you to search using any of the column headers along with additional date parameters.

**Global Report** Need Help? 1-844-267-1500

Filters

Name: **Insurance Name** (dropdown) Dewey, Cheatem & Howe (dropdown)  Activate

Date: Last Date of Billing (dropdown) From: 9/1/2025 (dropdown) To: 9/30/2025 (dropdown)  Activate

Drag a column header here to group by that column

Insurance Name	Patient Name	Provider Name	Last Date of Service	Total Charges	Total Allowed Amount	Total Provider Discount
----------------	--------------	---------------	----------------------	---------------	----------------------	-------------------------

In the example below, I have looked for records on a specific patient. The Global Report includes totals at the bottom of each currency amount column

Print Export

**Global Report** Need Help? 1-844-267-1500 Free Support!

Filters

Name: Patient Name (dropdown) Franklin, Miles (dropdown)  Activate

Date: Last Date of Service (dropdown) From: [ ] To: [ ]  Activate

Report Title: Global Activity Report

Drag a column header here to group by that column

Patient Name	Provider Name	Last Date of Service	Total Charges	Total Allowed Amount	Total Provider Discount	Total Primary Insurance Payment	Last Primary Insurance Payment Date	Last Date of Billing	Balance	Last Statement Created	Total CoPayments	Last CoPayment Date	Total Payments	Last Payment Date	To Adjust
Franklin, Miles	Billing Provider	9/10/2025	\$150.00					7/4/2025							
Franklin, Miles	Billing Provider	7/11/2025	\$550.00					7/11/2025	\$0.00						
Franklin, Miles	Billing Provider	7/11/2025	\$550.00	\$550.00	\$0.00	\$0.00	11/10/2025	7/11/2025	\$100.00				\$350.00	11/10/2025	
Franklin, Miles	Billing Provider	8/5/2025	\$1,350.00	\$100.00	\$50.00	\$50.00	11/7/2025	7/4/2025	\$5.00		\$40.00	10/24/2025	\$5.00	11/10/2025	
Franklin, Miles	Billing Provider	7/4/2025	\$550.00	\$475.00	\$75.00	\$400.00	9/30/2025	7/4/2025	\$55.00				\$20.00	10/2/2025	
			\$3,150.00	\$1,125.00	\$125.00	\$450.00			\$160.00		\$40.00		\$375.00		

In the Global Report, you can right-click on a claim line to open it in the Ledger Payments section. This function allows you to review, edit, and add payments to this claim.

Right-click on the claim line and select [Ledger Payments](#).

**Global Report** Need Help? 1-844-267-1500

Filters: Name Insurance Name   Activate Filter Clear Report

Date Last Date of Service From  To   Activate

Drag a column header here to group by that column

Insurance Name	Patient Name	Provider Name	Last Date of Service	Total Charges	Total Allowed Amount	Total Provider Discount	Total Insurance
KAISER BRONZE 60 DHMC	Alfred, Brown	Lake Primary Care	7/1/2025	\$500.00	\$400.00	\$100.00	
KAISER BRONZE 60 DHMC	Alfred, Brown	Lake Primary Care	Ledger Payments		\$350.00	\$150.00	
	Cole, Susan	Lake Primary Care	11/2/2025	\$100.00			
PARTNERSHIP HP	DAVIS, JOHN	Billing Provider	7/30/2025	\$1,450.25			
KAISER BRONZE 60 DHMC	Elizabeth, Fred	Lake Primary Care	10/22/2025	\$875.00			

### Ledger Payments section

**Ledger - Alfred, Brown** Need Help? 1-844-267-1500 Free Support!

CMS1500 Overview (Box 24->30) Ledger (Payments) Patient Information

Column Filter (Show/Hide)  CPT/HCPCS  Patient Name  Deductible  Co-Payment  Insurance Name

Line	CPT/HCPCS	Date Of Service	Charges	Allowed Amount	Provider Discount	Primary Ins.	Date (Primary Ins.)	Deductible	BALANCE
1	95959	7/1/2025	\$500.00	\$400.00	\$100.00	\$300.00	10/2/2025		\$100.00
									N/A
									N/A
									N/A
									N/A
									N/A
			\$500.00	\$400.00	\$100.00	\$300.00		\$0.00	

**PATIENT**

Copayment/Coinsurance	Date (Copayment)	Payment	Date (Payment)	Adjustment	Patient Name	Insurance Name	PATIENT BALANCE
<No Patient Payment to display - Click the Add Payment button to add a payment>							\$100.00

Add Payment Delete Payment

Primary Insurance: KAISER BRONZE 60 DHMC  
Secondary Insurance: No

Notes

Reset Payment  Yes  No

## [2.1.8 Help Button](#)

The Help Button opens the following links and documents

<ul style="list-style-type: none"><li>• Quick Start Guide</li><li>• User Manual</li><li>• Online Help</li></ul>	<ul style="list-style-type: none"><li>• NUCC 1500 Claim Form Instruction Manual</li><li>• Medicare 1500 Claims Processing Manual</li><li>• Contact Support</li></ul>
---	--

Help

**Quick Start Guide** - This is a consolidated reference guide to using Speedy Claims V7.

**User Manual** - A much more thorough guide to all of the Speedy Claims V7 functions with instructions

**Online Help** - This will take you to our website knowledgebase with helpful tips and answers to FAQ.

**NUCC 1500 Claim Form Instruction Manual** - An up to date manual provided by the National Uniform Claims Committee with CMS 1500 form field detailed descriptions and instructions.

**Medicare 1500 Claims Processing Manual** - This an additional CMS 1500 manual with additional specifics pertaining to Medicare guidelines.

**Contact Support** - This will take you to our website contact us page

# Part 3:

## Additional Help References:



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## 3.1 Printing

You have two options for printing your claims.

- You can print your claims onto the pre-printed red forms, which can be purchased from many vendors.
- You can print your claims onto a blank sheet of paper. This option prints the form and the data in black or color (red).

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

The screenshot shows a 'Settings' window with various configuration options. The 'Default Print Type' section is highlighted with a red border. It contains three radio button options: 'Print on Red CMS-1500 Form' (selected), 'Print on Blank 8.5 x 11 Paper (Color)', and 'Print on Blank 8.5 x 11 Paper (Black)'. Other settings include 'Box # 24 - Total Charges', 'Program Protection Password', 'Box # 26 - Patient Account No. - Auto Create', 'Check for Updates Automatically', 'Claims List Double-Click Behavior', 'Automatic Data Backup', 'Print Zero Dollar Amounts', 'Print the decimal point in ICD Codes', 'Scrub Warning before Print', and 'Claims List Range'.

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 preprinted 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, as it must be a specific type of OCR red ink compatible with their scanners.
2. When they manually enter your data into their systems, they can and do make mistakes. These mistakes can cause delays and lead to claim rejections, resulting in financial losses.

3. Most folks want to print the form to save money. However, you can purchase the forms from us for 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 actually saving money by printing your own forms

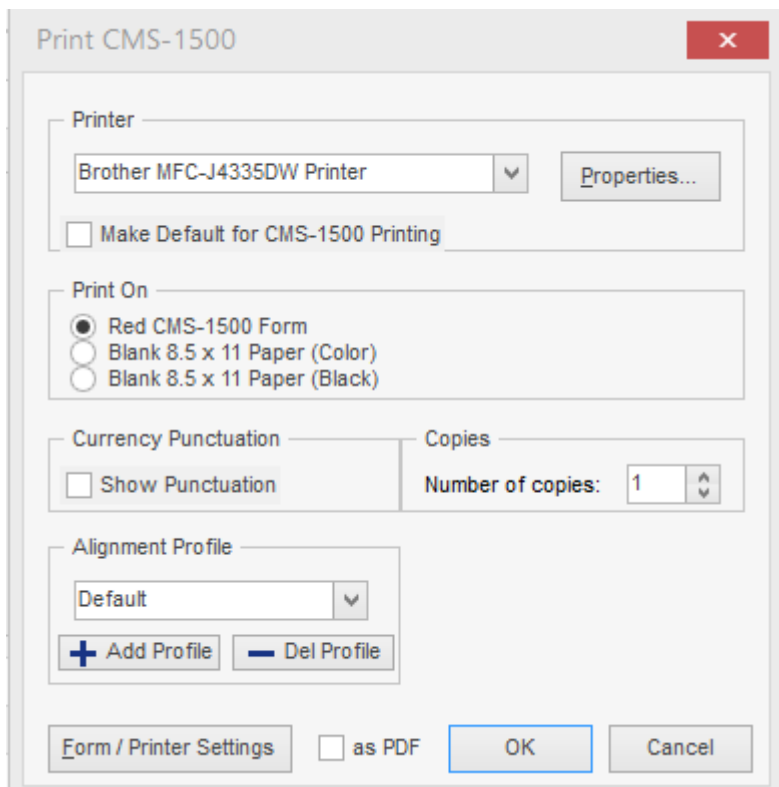
Printing can be done claim by claim as you create them, or you can print them later from the [Claims List](#).

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

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



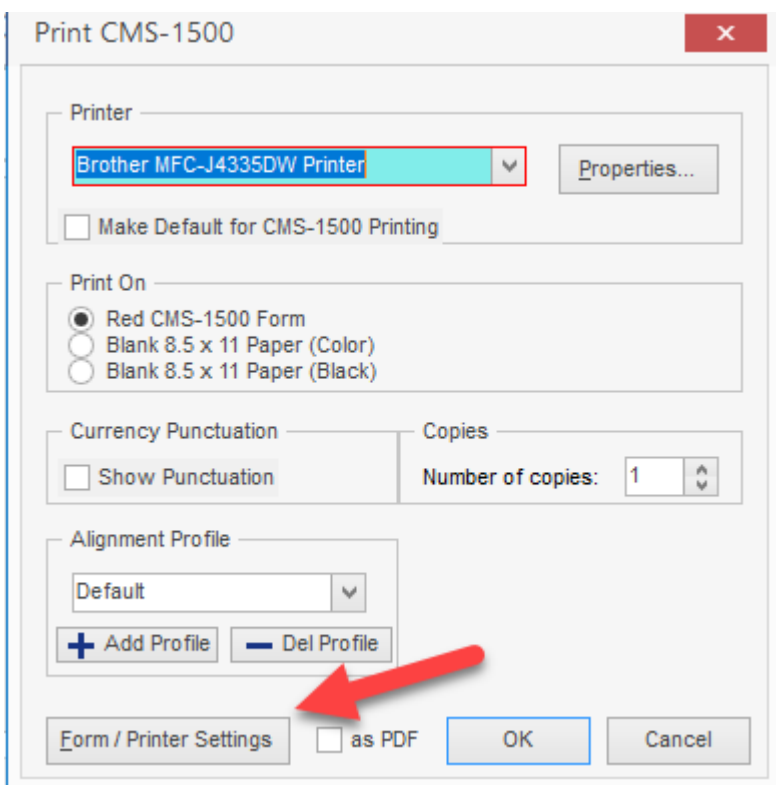
If you have any [print alignment](#) problems, the Form / Printer Settings button in the lower left corner of the dialog box is where you go to fix them.



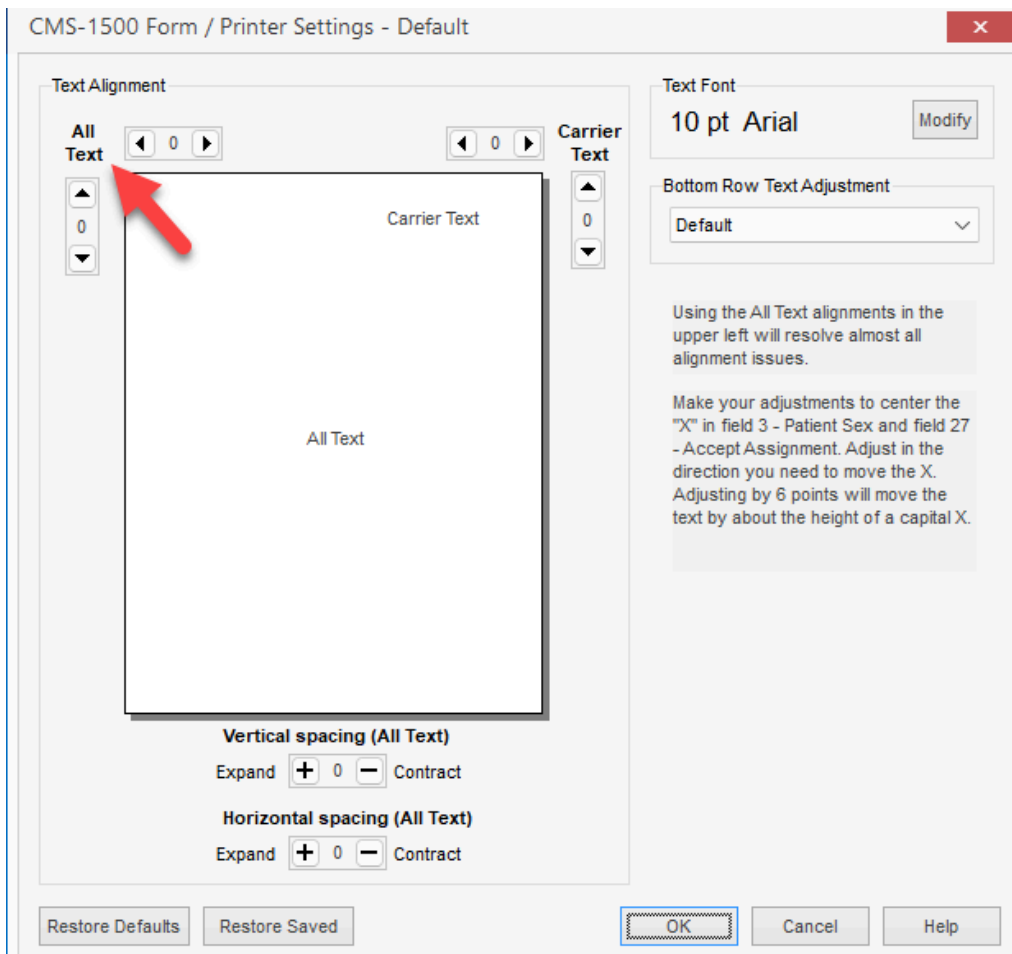
## 3.2 Printer Alignment Guide

Adjust your print alignment for your printer when printing on Red CMS pre-printed forms.

When you begin using the program, switch computers, or change printers, you may need to make adjustments to the alignment. Once you have 1 claim printed and see it needs to be adjusted, highlight the claim again in your claim list and select to print again. When your print screen appears, select Form / Printer Settings in the lower left corner

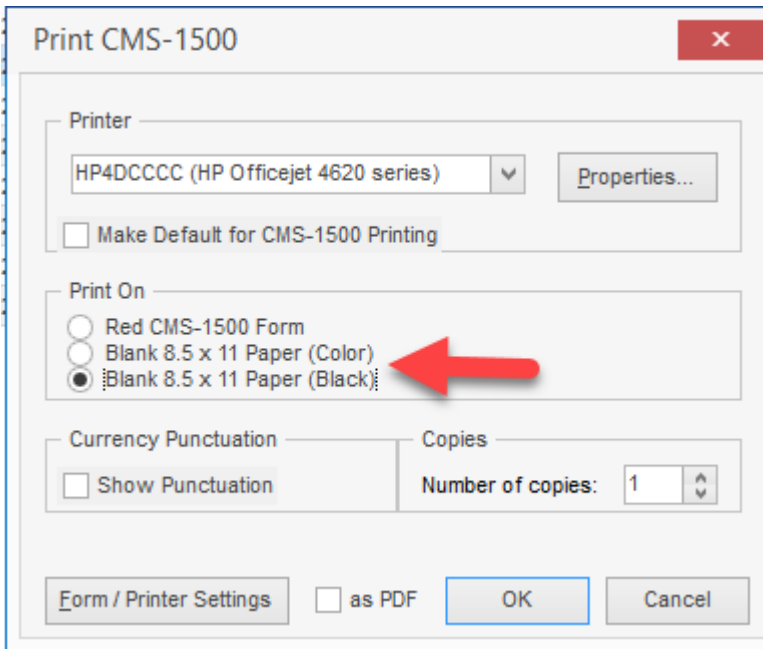


This takes you to the Printer Settings window. Use the All Text to adjust the print as needed.

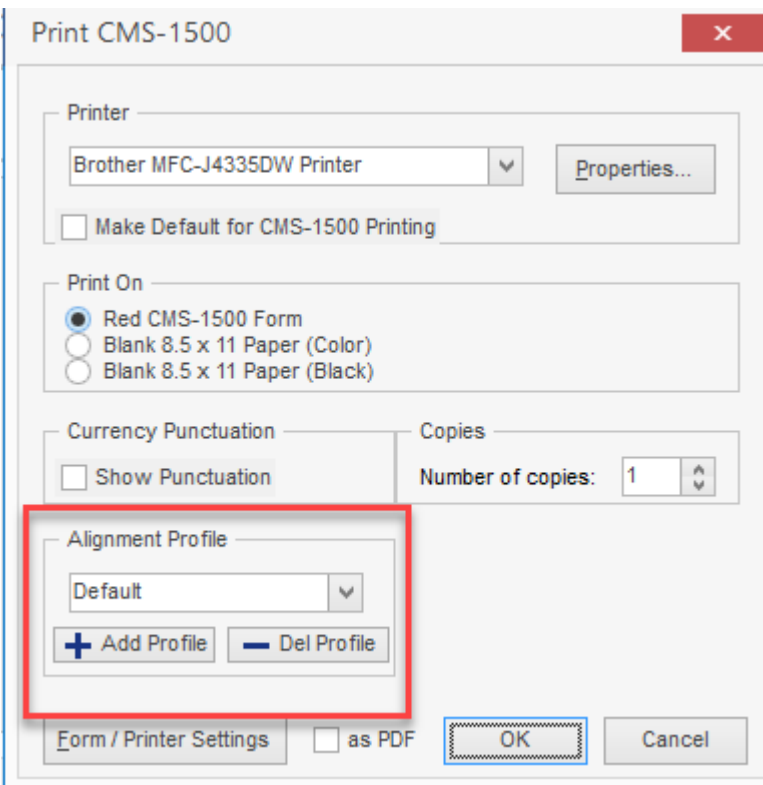


If the top half becomes accurate, leaving the bottom needing to be moved up or down, the Vertical Spacing can be used to Expand/pull down or Contract/push up the bottom half. The Horizontal spacing can be used to Expand or Contract the right side in or out. Once your adjustment is correct, the setting will be saved.

NOTE. If you are printing on blank paper and want to print an image of the form as well, select one of the Blank Paper options as your Print On option.



#### Alignment Profile



The Alignment Profile is used to create different alignment settings for separate printers.

## 3.2 Electronic Claim batching

### Creating an ECH or ANSI file for electronic submission

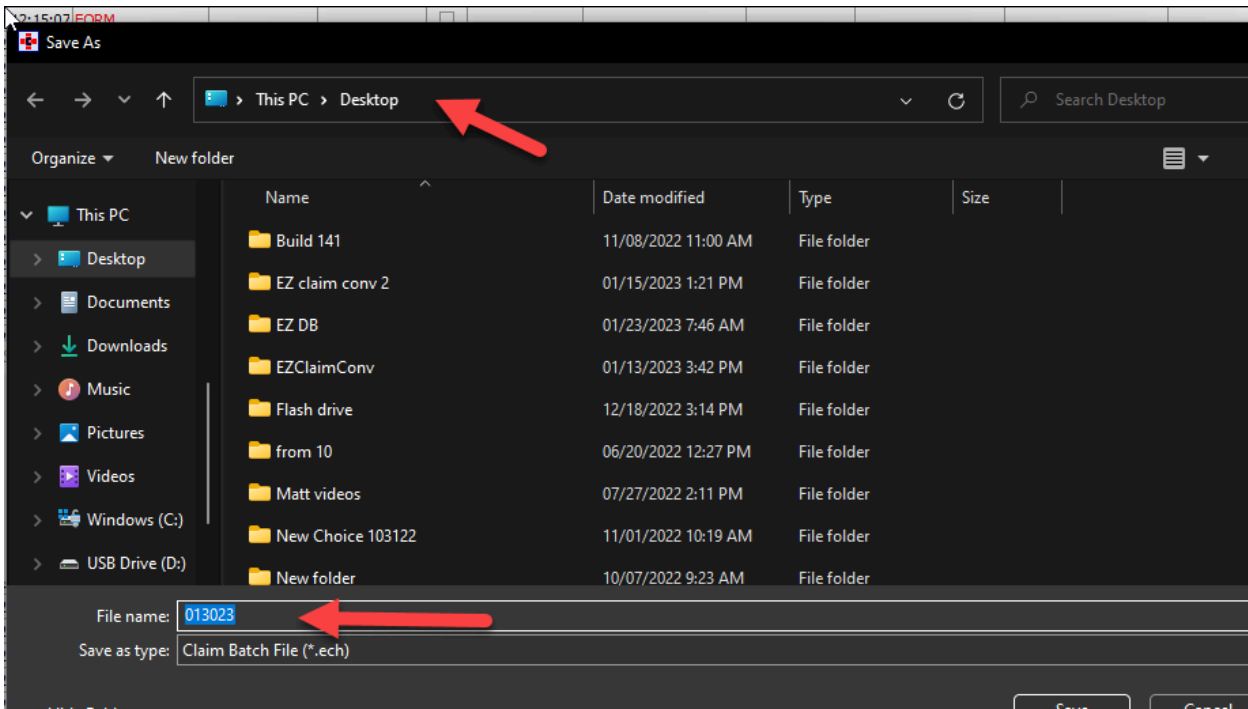
Here is an example of the electronic batch creation in the program.

1 – Highlight the selected claims to batch and click on Create Batch for print image output. Select ANSI Batch for the ANSI 837 Output.

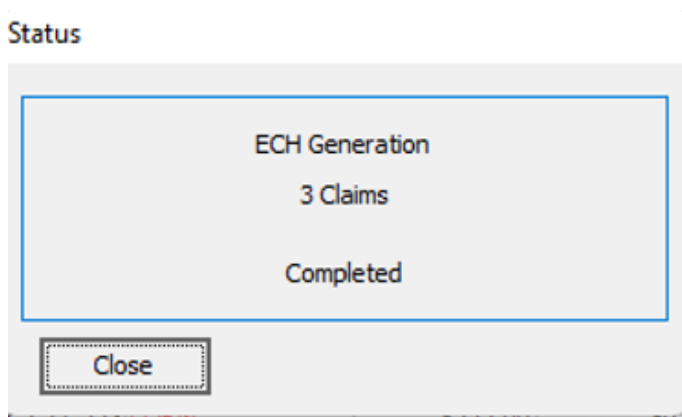
The screenshot displays the 'Claims List' window in the CMS 1500 software. The menu bar includes 'New Copy', 'Edit', 'Sec. Claim', 'Cut', 'Copy', 'Paste', 'ECH Batch', 'ANSI Batch', 'Close Batch', 'Scrub', and 'Print'. Two red arrows point to the 'ECH Batch' and 'ANSI Batch' buttons. The 'Claims List' table has the following data:

Patient Name	Date of Birth	Address	City	State	Zip Code	Insured Name
DAVIS, JOHN	07/12/1985	123 NO ADDRESS	ALBANY	CA	94706	DAVIS, JOHN
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED
DON, FRED	10/27/1980	50 PARK DR	ALBANY	CA	95070	DON, FRED
Lester, Matt	05/01/2024	123 St	Eustis	FL	32726	Lester, Matt
Lester, Matt	05/15/2024	456 Ave	Eustis	FL	32489	Lester, Matt
Lester, Matt	05/01/2024	123 St	Eustis	FL	32726	Lester, Matt
Lester, Matt	05/01/2024	123 St	Eustis	FL	32726	Lester, Matt
Lester, Matt	05/01/2024	123 St	Eustis	FL	32726	Lester, Matt

2—Name the file. Mine is for today’s date. Save it to your preferred path destination.



3 – Close the confirmation window



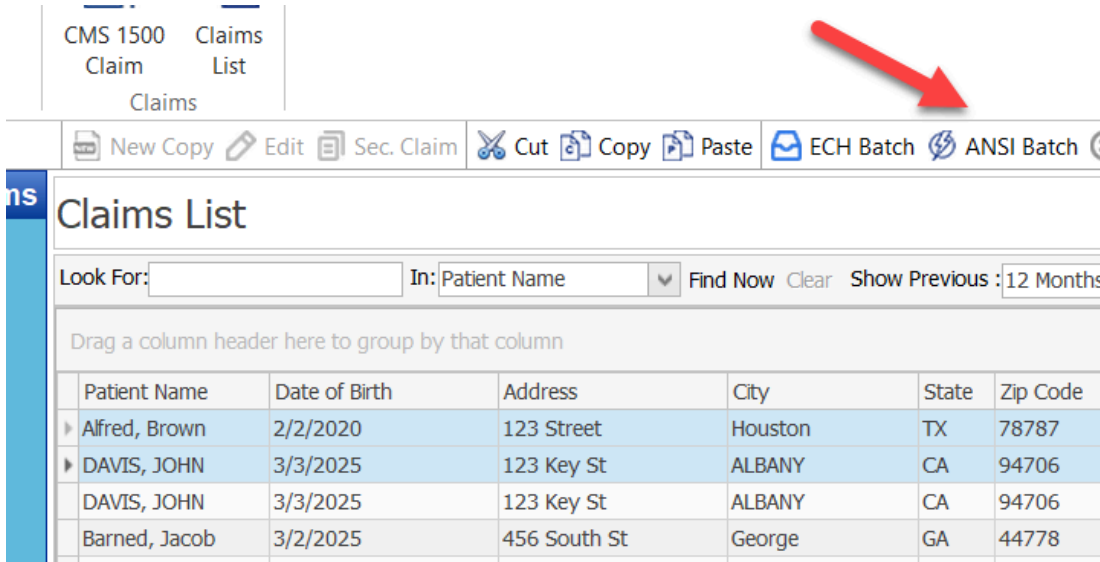
4 – Close Batch

The screenshot shows a software interface for managing claims. At the top left, there are two buttons: 'CMS 1500 Claim' and 'Claims List', both with a 'Claims' label below them. To the right of these is a red arrow pointing towards the 'Close Batch' button in the main toolbar. The main toolbar contains several icons and labels: 'New Copy', 'Edit', 'Sec. Claim', 'Cut', 'Copy', 'Paste', 'ECH Batch', 'ANSI Batch', and 'Close Batch'. Below the toolbar is a section titled 'Claims List' with a 'Need Help' link on the right. Underneath the title bar, there is a search area with a 'Look For:' text box, an 'In:' dropdown menu set to 'Patient Name', 'Find Now' and 'Clear' buttons, a 'Show Previous:' dropdown menu set to '12 Months', and an 'Include Ir' checkbox. At the bottom of this section is a grey bar with the text 'Drag a column header here to group by that column'.

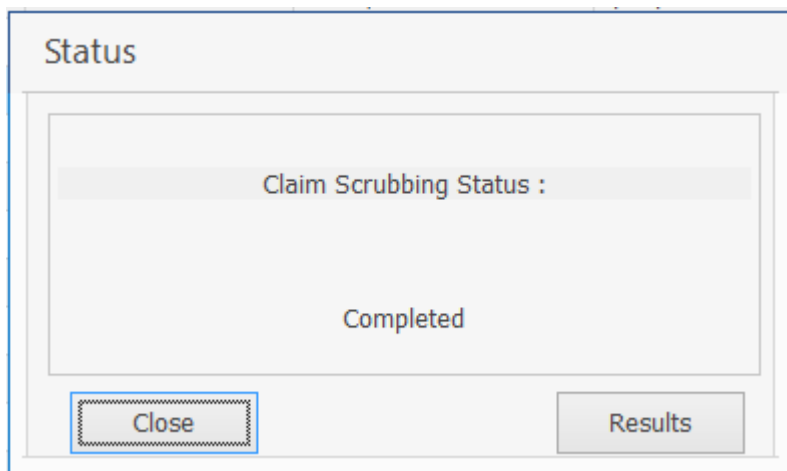
NOTE. While the Batch is still open, additional claims can be added to the file you have started on and created. Once closed, it is ready to upload to your clearinghouse.

### 3.2.1 ANSI Scrub feature

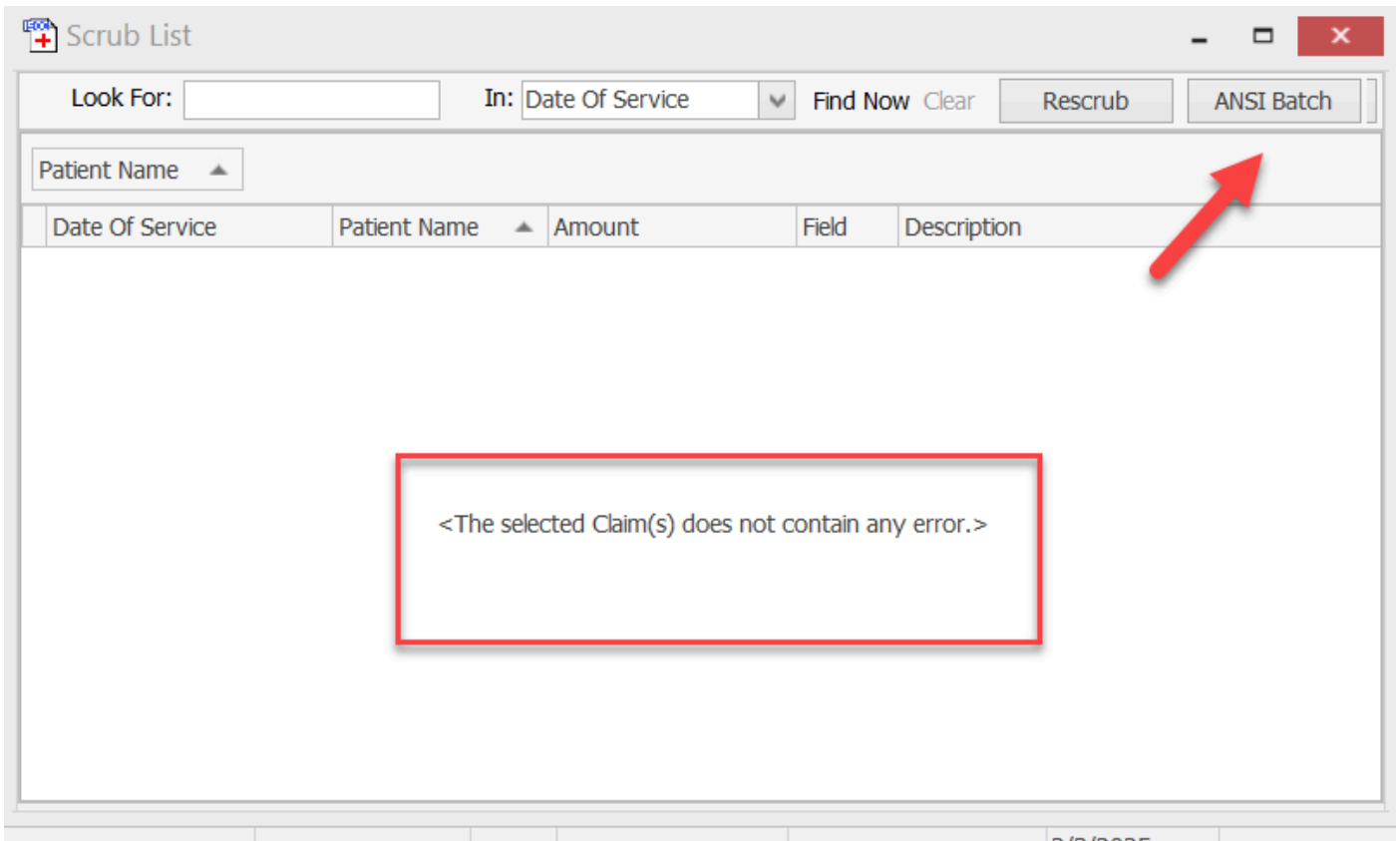
Speedy Claims features built-in claim scrubbers to help ensure that certain required fields are not overlooked. When creating an ANSI Batch, it undergoes an ANSI scrub check to ensure that the data is entered correctly for accurate reading through the ANSI output



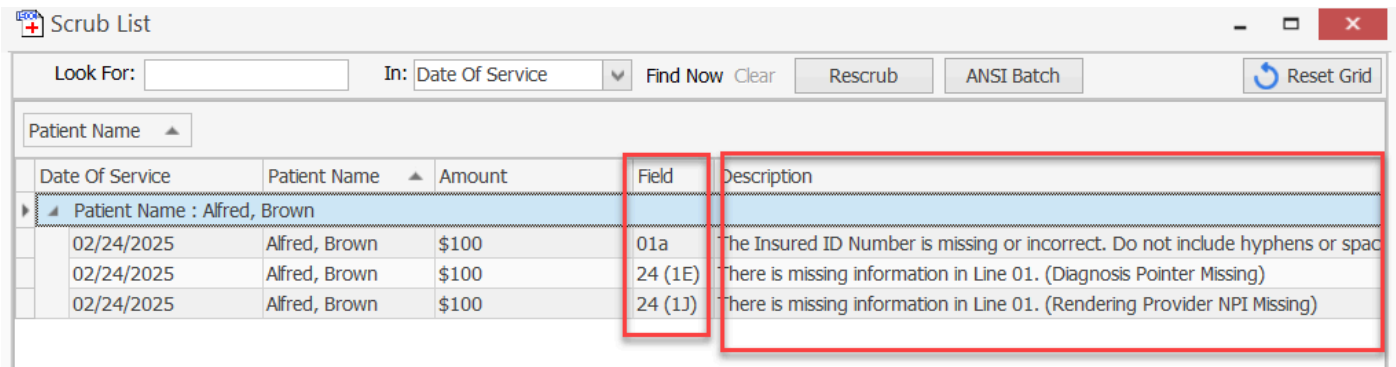
After highlighting your selected claim/s and selecting ANSI Batch you will get the following scrub result window.



Select Results to get the next window. If the results show no errors, continue to ANSI Batch



If the ANSI scrub detects any fields missing or entered in an incorrect format, it will show them under the patient's name. The field location and description of the needed addition or change are as follows.



When you select a line item, it will display the corresponding section from the form below. Changes can be made or added here to correct the claim. The changes will also be saved to your claim in Speedy Claims. Once you correct the detected scrub issues, The example shows data missing in fields 24E and 24J.

Scrub List

Look For:  In: Date Of Service

Patient Name

Date Of Service	Patient Name	Amount	Field	Description
Patient Name : Alfred, Brown				
2/24/2025	Alfred, Brown	\$100	01a	The Insured ID Number is missing or incorrect. Do not include hyphens or space
2/24/2025	Alfred, Brown	\$100	24 (1E)	There is missing information in Line 01. (Diagnosis Pointer Missing)
2/24/2025	Alfred, Brown	\$100	24 (1J)	There is missing information in Line 01. (Rendering Provider NPI Missing)

There is missing information in Line 01. (Diagnosis Pointer Missing)

24. A. DATE(S) OF SERVICE			B. PLACE OF SERVICE	C. EMG	D. PROCEDURES, SERVICES, OR SUPPLIES (Explain Unusual Circumstances) CPT/HCPCS			E. DIAGNOSIS POINTER	F. \$ CHARGES	G. DAYS OR UNITS	H. EPSDT Family Plan	I. ID. QUAL.	J. RENDERING PROVIDER ID. #
From MM DD YY	To MM DD YY				MODIFIER								
2/24/2025	2/24/2025		11		12311				\$100.00	1		NPI	

Rescrub to get the message that "The selected Claim(s) does not contain any error". Continue by selecting ANSI Batch from the button above

Name the file. Mine is for today's date. Save it to your preferred path destination.

Save As

This PC > Desktop

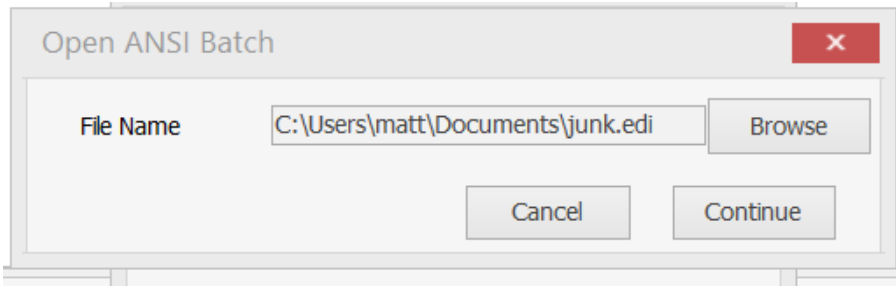
Organize New folder

Name	Date modified	Type	Size
Build 141	11/08/2022 11:00 AM	File folder	
EZ claim conv 2	01/15/2023 1:21 PM	File folder	
EZ DB	01/23/2023 7:46 AM	File folder	
EZClaimConv	01/13/2023 3:42 PM	File folder	
Flash drive	12/18/2022 3:14 PM	File folder	
from 10	06/20/2022 12:27 PM	File folder	
Matt videos	07/27/2022 2:11 PM	File folder	
New Choice 103122	11/01/2022 10:19 AM	File folder	
New folder	10/07/2022 9:23 AM	File folder	

File name: 013023

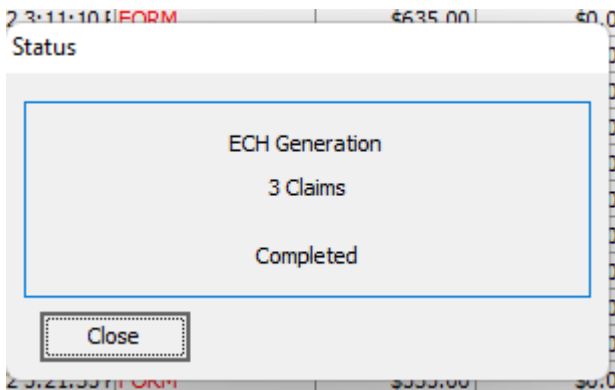
Save as type: Claim Batch File (\*.ech)

After saving you will receive a follow up window confirming the save path.



Select Continue to complete your ANSI Batch creation

Close the confirmation window



Close Batch when you are ready to upload the file to your Clearinghouse.



## Claims List

Need Help? 1-844-267-1500 F

Look For:  In: Patient Name   Show Previous: 12 Months

Drag a column header here to group by that column

Patient Name	Date of Birth	Address	City	State	Zip Code	Insured Name	Date of
Alfred, Brown	2/2/2020	123 Street	Houston	TX	78787	Alfred, Brown	2/24/20
DAVIS, JOHN	3/3/2025	123 Key St	ALBANY	CA	94706	DA	3/5/20

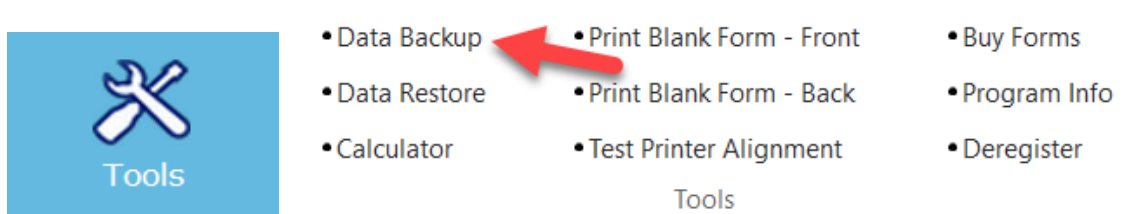
NOTE. While the Batch is still open, additional claims can be added to the file you have started on and created. Once closed, it is ready to upload to your clearinghouse.

### 3.3 Transferring to a New Computer

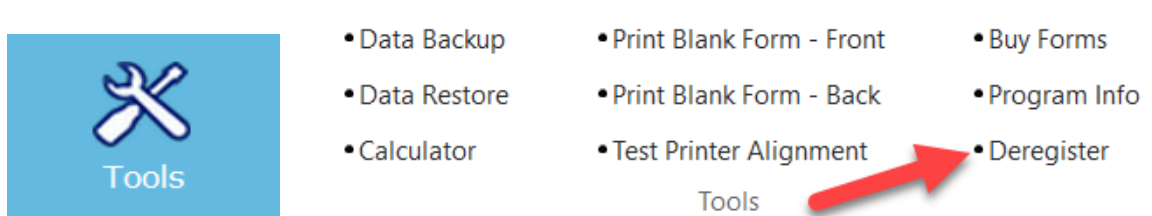
So, you have a new computer and want to move your Speedy Claims and records to it? Here's how to do it without encountering a registration problem.

#### On the old computer -

1. Start Speedy Claims and click on "Tools" then "Data Backup". The file will be named backup\_XXXXXX.ssf. x's for the current date. Save the backup to a USB or any shared folder that you can access from the new computer. You can use a file sharing program as well, such as Dropbox, OneDrive or Send Anywhere. The goal is to get your data backup to your new computer for the purpose of doing the data restore.

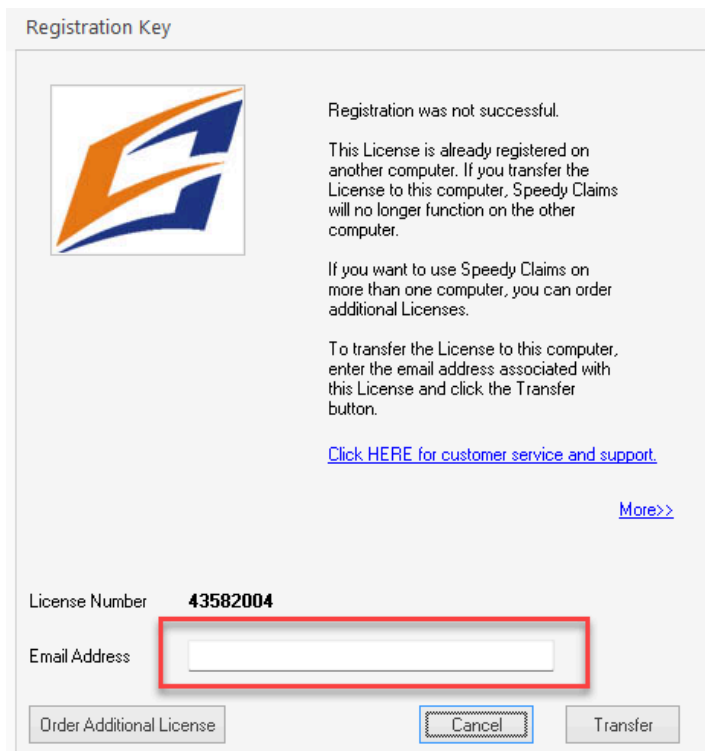


2. Click on "Tools" then "Deregister". This will release your serial number for use on the new computer. This must be done while online or it will fail.



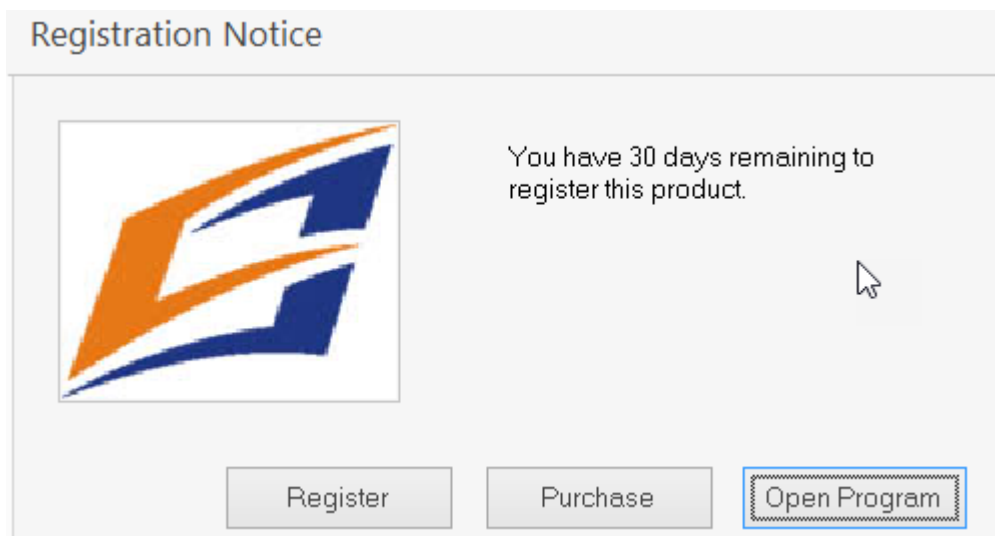
3. If you are unable to complete these steps on the original computer due to a any reason, a force transfer\* of your license can be done to the new computer without doing a Deregister.

\*Force Transfer - If you are unable to deregister to release your license number and need to use it on a new install, you will receive the following message when registering with your license number. Enter your email that was used when you registered previously and select Transfer. Restore your last backup file into your new Speedy Claims install.

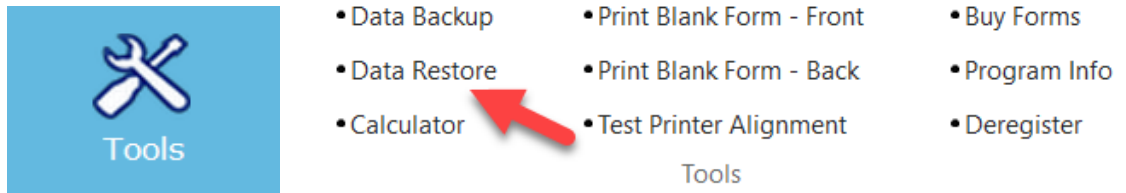


**On the new computer -**

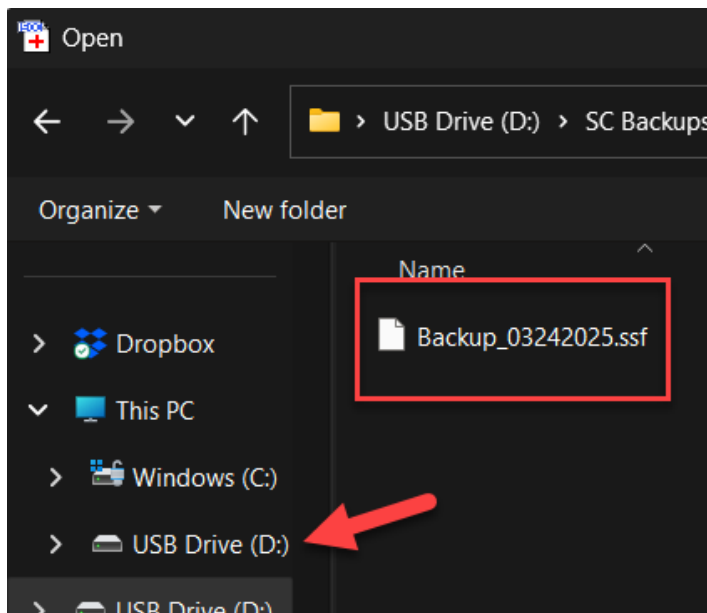
1. On your new computer [Download](#) Speedy Claims V7.
2. Once installed, open the software. You will see a popup asking if you want to register now or later. Choose Register Now and then enter your license number and click continue twice.



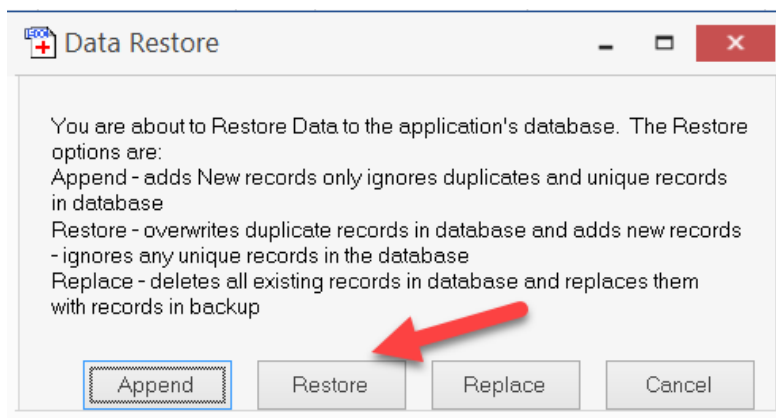
3. Click on "Tools" then "Data Restore". Be sure your flash drive is inserted, if you use one for the backup file.



Then navigate to the backup file on it.



Double-click the file, and a popup will appear asking if you want to Append, Restore, or Replace the database. Select 'Restore', and all your data will be restored to the new installation.



4. Click on the "Claims List" to make sure all your files are there. You may have to click on the CMS 1500 form first then click on the Claims List to show the files.

That's it, you're done!

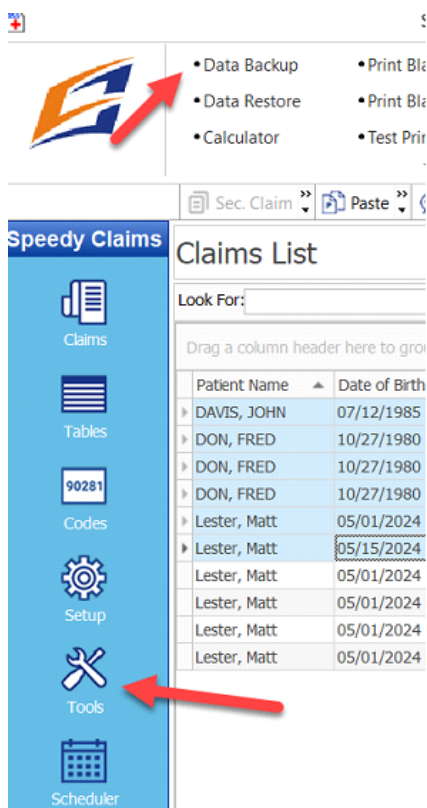
## 3.4 Backing Up and Restoring Data

We have a built-in Backup and Restore system to help protect your data and work in the event of a computer crash. It is very simple to use, and we highly recommend backing up your data frequently.

### Backing up Your Data Correctly!

It is very important to save your data frequently from your computer in case of a crash. That backup is an encrypted copy of your database and is used only to restore it into Speedy Claims.

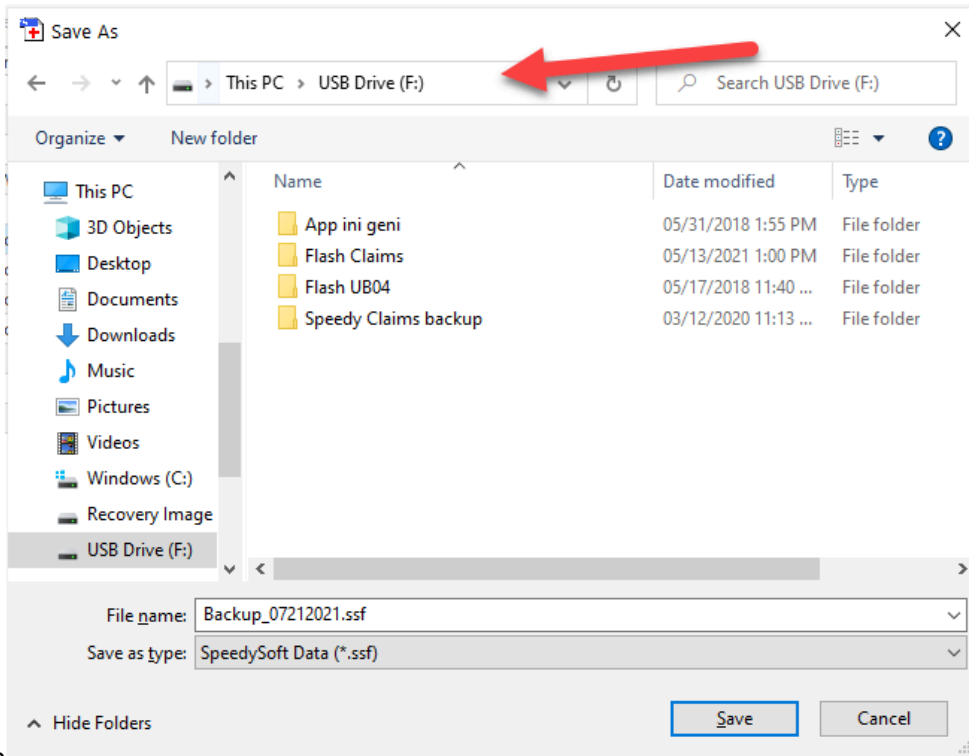
Select "[Tools](#)" from the left column and then select "Data Backup" from the options above.



You will then see a Save window, showing you where the file is being saved, as well as the name of the backup. For your extra protection in case of a crash, saving the backup off the computer will make the risk of losing all your

records much less likely. Installing the software and transferring the license is very simple. Below is a shot of the backup save window. I am directing this to my USB/Flash drive. I have also created a folder on the USB. Opening that folder will direct the backup to it, keeping my backups in a specific folder on the USB

Other options for saving your backup file, such as a shared network or server, cloud storage, or an external drive, are also acceptable. The primary purpose is to have a current backup saved on a separate location, from the program is installed and the database is located. Reinstalling the program is easy, but re-entering all your data can be very time-consuming without the backup.

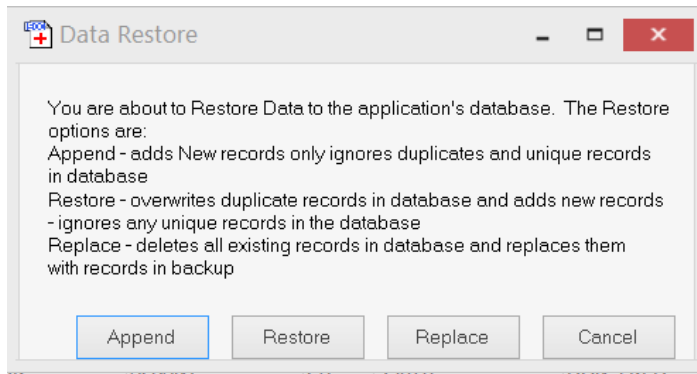


0

As shown in the File name, the backup file name includes the date it was created, so you can easily find the most recent one in the event of a restore on a new installation.

### **Restoring**

To restore your database to a new installation of the software, simply click on [Tools](#), then Data Restore. You will be prompted to browse to the location of your backup file. Select it and click Open or double-click on the file. You will receive the following window.



If restoring to a NEW installation, select Restore.

If you are restoring data from one database to another and want to combine the two, select 'Append'.

To overwrite one database with the one from the backup, select Replace

Please note that this function is not intended for transferring data between computers or exporting 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.