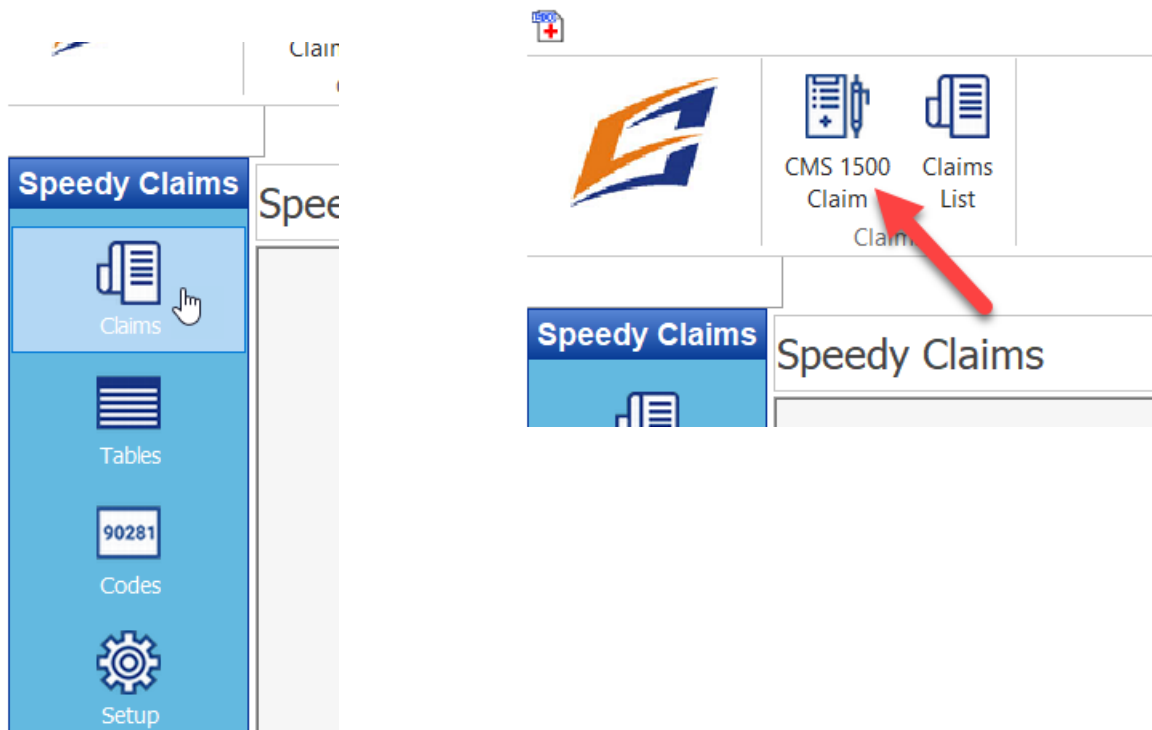


CREATING CLAIMS

Click on Claims from the top left vertical navigation field and select "CMS 1500 Claim" from the top. This will display a blank form that is ready to be filled out.



If you have more than one template created, select the one you need from the dropdown in the upper left and click on Apply Template before beginning to fill out your claim.

Speedy Claims

CMS 1500 Claim Claims List

Claims

New Cut Copy Paste Create Batch Close Batch Scrub Print Save Cancel

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

Template: **Template 1** Active Page 1 of 1

Mode: **Template 1** Paid + ADD PAGE ← →

Status: **Template 2** Use 4 Digit Service Year on Forms Make Secondary Claim

Payor ID

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

PICA

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

9. OTHER INSURER'S NAME (Last Name, First Name, Middle Initial) 10. IS PATIENT'S COMPLETION DELAYED TO 11. INSURER'S POLICY/CONTRACT OR REFERENCE NUMBER

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.

CMS 1500 Claim Claims List

Claims

New Cut Copy Paste Create Batch Close Batch Scrub Print Save Cancel

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

Template: Template 1 Active Page 1 of 1
 Mode: New Changed By: matt Paid + ADD PAGE - +
 Status: SAVE Changed Date: 09/27/2024 8:18:43 AM Use 4 Digit Service Year on Forms Make Secondary Claim

Payor ID: KA145 KAISER BRONZE 60 DHMO
 123 South St
 Eustis FL 12345

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

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.

*If you are new to the 1500 form or need any specific information about the form fields, the NUCC manual is also included in the software under HELP at the lower left, then select the NUCC Claim Form Manual from your list.

1. MEDICARE MEDICAID
 (Medicare#) (Medicaid#) (Medicaid#)

2. PATIENT'S NAME (Last Name, First Name)
 DON, FRED

5. PATIENT'S ADDRESS (No., Street)
 50 PARK DR

CITY
 ALBANY

ZIP CODE TELEPHONE
 95070 (480)

9. OTHER INSURED'S NAME (Last Name, First Name)

a. OTHER INSURED'S POLICY OR GROUP NUMBER

b. RESERVED FOR NUCC USE

speedy claim

ims

- Quick Start Guide
- User Manual
- Online Help
- NUCC 1500 Claim Form Instruction Manual
- Medicare 1500 Claims Processing Manual
- Contact Support

Help

New Cut Copy Paste Create Batch Close Batch Scrub Print Save

Once you have completed inputting all your claims, you can click on the Claims List icon to view a list of all your claims.

Patient Name	Date of Birth	Address	City	State	Zip Cod
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

From this list you can select claims for printing or sending to a clearinghouse if you have the Electronic Claims version. Highlighting the claim with a single click will show the options above, such as Print, Create Batch, and ANSI Batch for 837 EDI file “for electronic file creation”, New Copy, and Edit. Double-clicking on a claim opens it as a new copy by default for creating a new claim for the existing patient by quickly changing data for the latest visit without the need to re-enter the entire claim. To add or correct an existing claim use the Edit function.

A new claim for an existing patient

- a. Click on Claims Button – Claims List Icon
- b. Highlight a previous claim for the patient then click the New Icon or Double click on the claim
- c. Change the date of service in Field 24a and any codes if necessary
- d. Click Save or Print

CREATING TEMPLATES

The screenshot shows the Speedy Claims software interface. On the left, a blue navigation menu has icons for Claims, Tables, Codes, Setup, and Tools. A red arrow points to the Setup icon. Below the menu is a 'Setup' bar with Settings and Templates icons; a red arrow points to the Templates icon. A toolbar at the top contains New, Cut, Copy, Paste, Delete, Save, and Cancel. The main area is titled 'Create Template - Do Not Enter Patient Data Here' and features an orange 'Template Field Values - Edit' section. A green arrow points to the 'Template Name' field, which contains 'Template 1'. Below this is a QR code and the text 'HEALTH INSURANCE CLAIM FORM'. On the right, there are input fields for 'Payor ID' and a 'Need He' label.

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 fields 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, you will want to ensure you have the correct one selected on your main CMS 1500 form before entering data.

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 click 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:

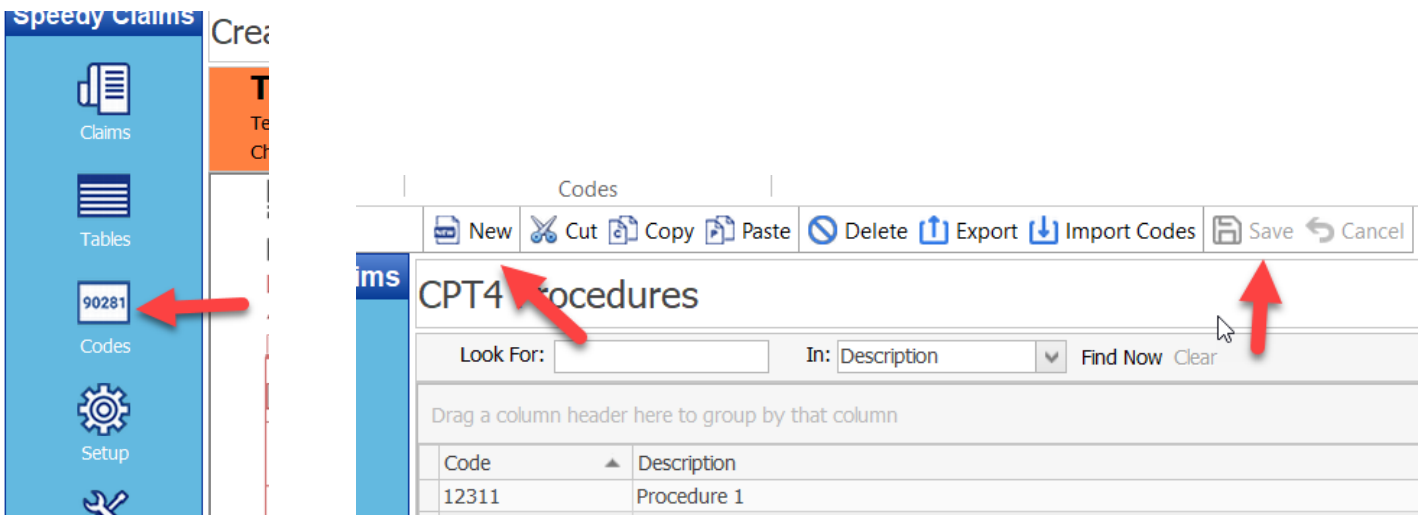
- Patient Name – Field 2
- Insurance Company – Carrier Fields
- Referring Provider – Field 17
- Diagnosis Codes – Field 21 **
- Place of Service Codes – Field 24b
- Procedure Codes – Field 24d **
- Service Facility – Field 32
- Billing Provider – Field 33
- All places where a date is required (Drop down)

** 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!

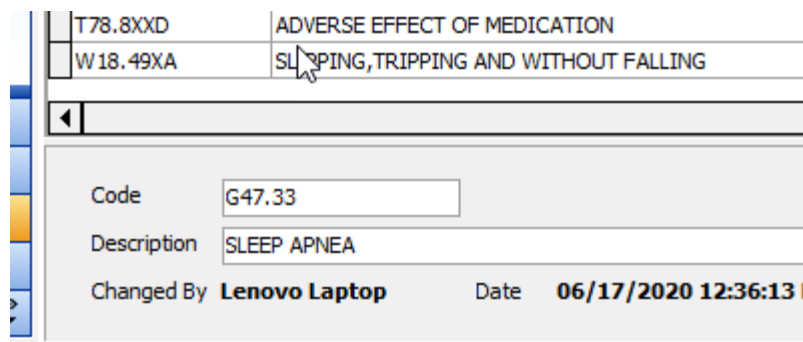
Below is an example of the ICD Codes table.

Select Codes at the left and then your Codes selection above. Selecting New at the top left will open a bottom section to fill in. Once finished select Save at the top. Repeat. The same steps can be done for your procedure codes as well, including charge amount!

This can be done to create your own CUSTOM code library for easy use when filling out your claims



and



Select NEW. Fill in your code, description, amount for CPT codes. Then click on SAVE

All other Tables in the program can also be pre-loaded this way. Alternatively, they will auto-populate from the claim itself when completed.

The screenshot displays the 'Speedy Claims' application interface. At the top, there is a navigation bar with icons for Patient, Facility, Insurance, Billing Provider, Referring Provider, Rendering Provider, Plan/Program, and Supplemental Information. Below this is a standard Windows-style menu bar with options: New, Cut, Copy, Paste, Delete, Export, Save, and Cancel. The main window is titled 'Insurance List' and features a search bar with 'Look For' and 'In: Name' fields, and 'Find Now' and 'Clear' buttons. A table below the search bar lists insurance records with columns for Name and Address. The 'KAISER BRONZE 60 DHMO' record is selected. Below the table is a detailed form for the selected record, with fields for Name, Address 1, Address 2, City, State (FL), Zip Code (12345), Phone #, Fax #, Payor ID, and Email. Three colored arrows point to the search bar, the 'KAISER BRONZE 60 DHMO' row in the table, and the 'Name' field in the form.

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

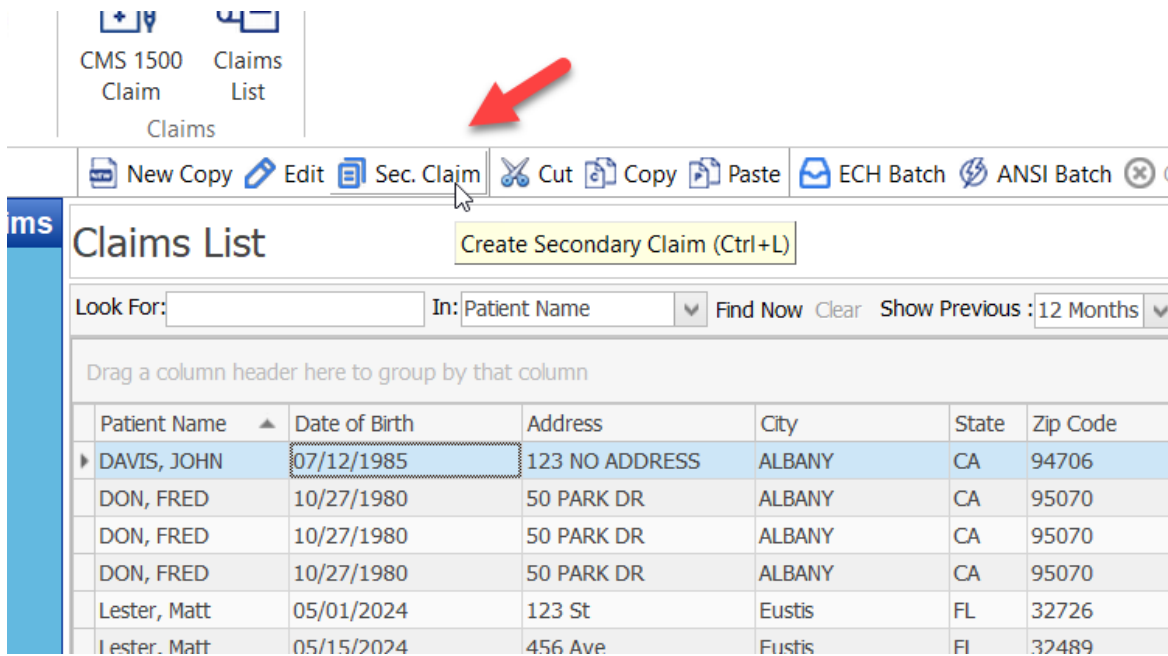
Name	KAISER BRONZE 60 DHMO	Phone #	() -
Address 1	123 St	Fax #	() -
Address 2		Payor ID	
City	City	State	FL
Zip Code	12345	Email	

NEW to **ENTER** new record and **SAVE**

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.

Highlight the claim from the claim list. 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 top toolbar containing buttons for 'New Copy', 'Edit', 'Sec. Claim', 'Cut', 'Copy', 'Paste', 'ECH Batch', 'ANSI Batch', and a close button. Below the toolbar is a 'Claims List' section with a search bar and a dropdown menu set to 'Patient Name'. A yellow box highlights the 'Create Secondary Claim (Ctrl+L)' button. Below this is a table with the following data:

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.

Printer: HP4DCCCC (HP Officejet 4620 series) Properties...

Make Default for CMS-1500 Printing

Print On:

- Red CMS-1500 Form
- Blank 8.5 x 11 Paper (Color)
- Blank 8.5 x 11 Paper (Black)

Currency Punctuation: Show Punctuation

Copies: Number of copies: 1

Form / Printer Settings as PDF OK Cancel

PRINT ALIGNMENT

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

You may need to adjust the alignment when you begin with the program, switch computers, or printers. Once you have 1 claim printed and see it needs to be adjusted, highlight the claim 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.

CMS-1500 Form / Printer Settings - Default

Text Alignment

All Text: ◀ 0 ▶

Carrier Text: ◀ 0 ▶

Vertical spacing (All Text): Expand + 0 - Contract

Horizontal spacing (All Text): Expand + 0 - Contract

Text Font: 10 pt Arial Modify

Bottom Row Text Adjustment: Default

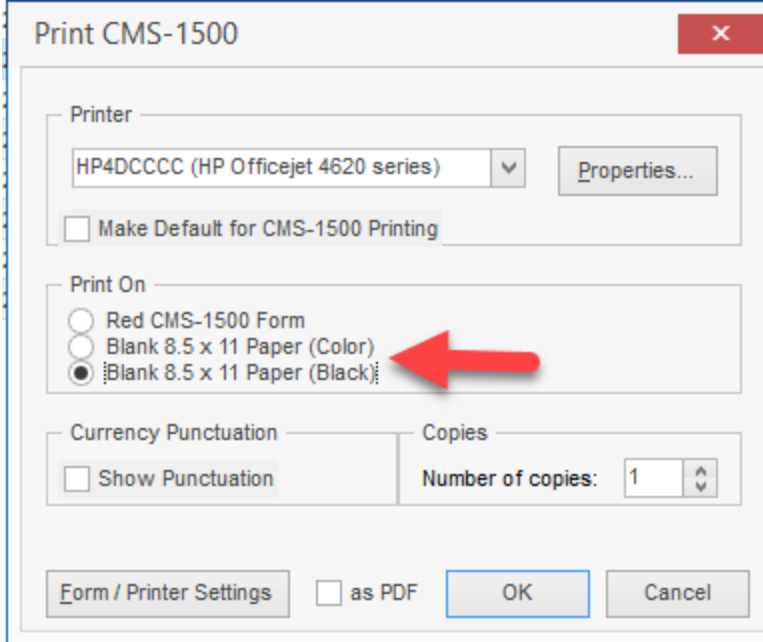
Using the All Text alignments in the upper left will resolve almost all alignment issues.

Make your adjustments to center the "X" in field 3 - Patient Sex and field 27 - Accept Assignment. Adjust in the direction you need to move the X. Adjusting by 6 points will move the text by about the height of a capital X.

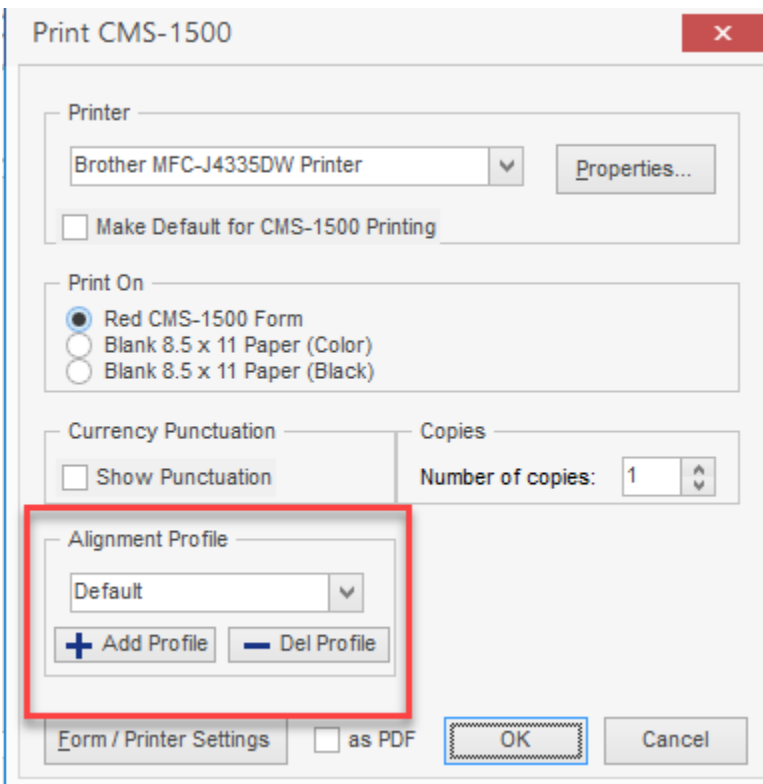
Restore Defaults Restore Saved OK Cancel Help

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 what you are printing on.



Alignment Profile



The Alignment Profile is used to create different alignment settings for separate printers. New profiles can be added for separate printers you may be using. As the print alignment can vary from printer to printer, individual printer profiles can be created, and the alignment setup for the different printers.

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 Create Batch for print image output. Select ANSI Batch for the 837 Output, new with Version 7.

CMS 1500 Claims List

New Copy Edit Sec. Claim Cut Copy Paste ECH Batch ANSI Batch Close Batch Scrub Print

Claims List Need Help? 1-844-267

Look For: In: Patient Name Find Now 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	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.

Save As

This PC > Desktop

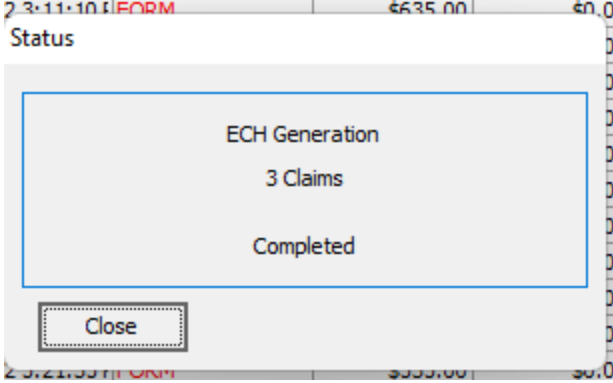
Organize New folder

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	

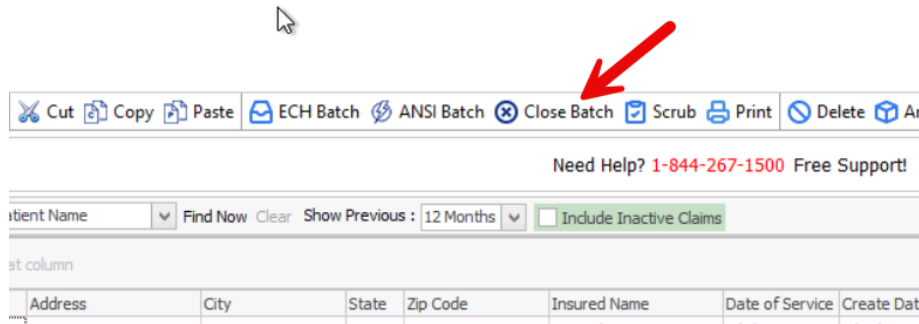
File name: 013023

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

3 – Close the confirmation window



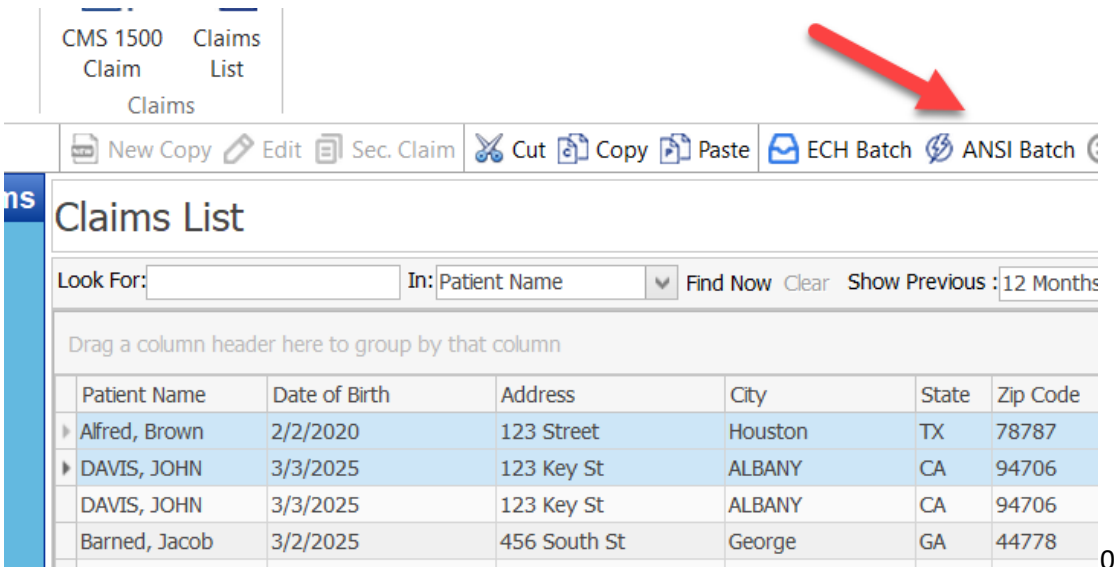
4 – Close Batch



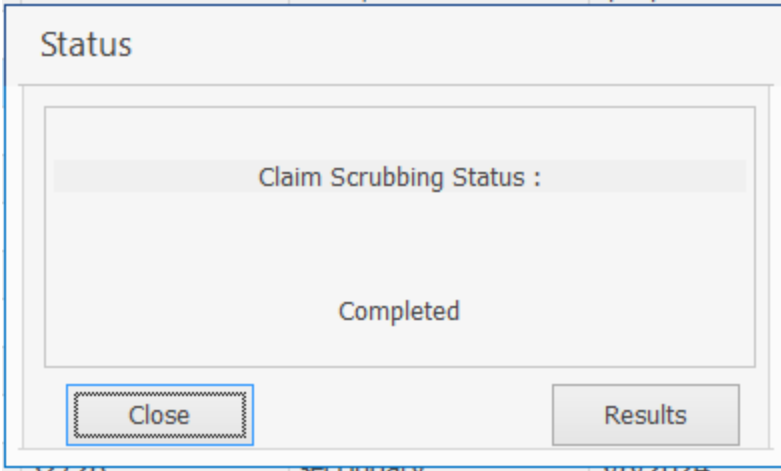
NOTE. While the Batch is still open, additional claims can be added to the file you have started on and created. Once closed, it is ready to upload.

ANSI Batch creation and Scrub feature

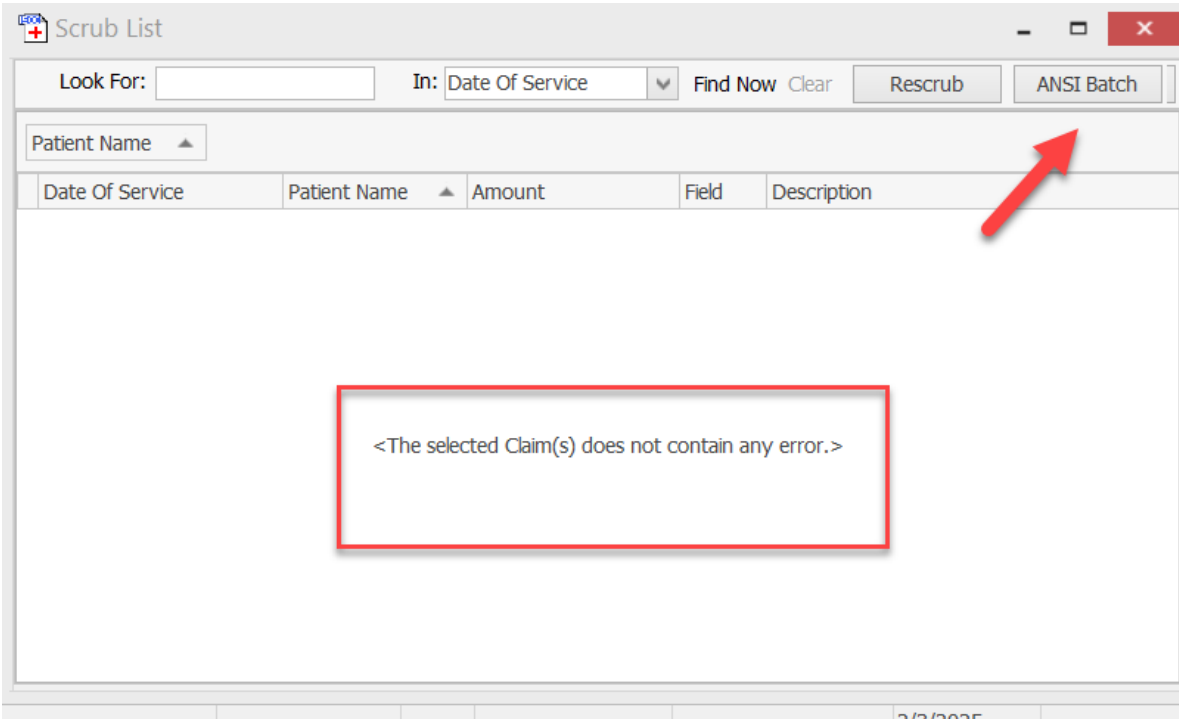
Speedy Claims features built-in claim scrubbers to help ensure that specific required fields are not overlooked. When creating an ANSI Batch, it undergoes an ANSI scrub check to ensure that the data is entered correctly for accurate reading through the ANSI output



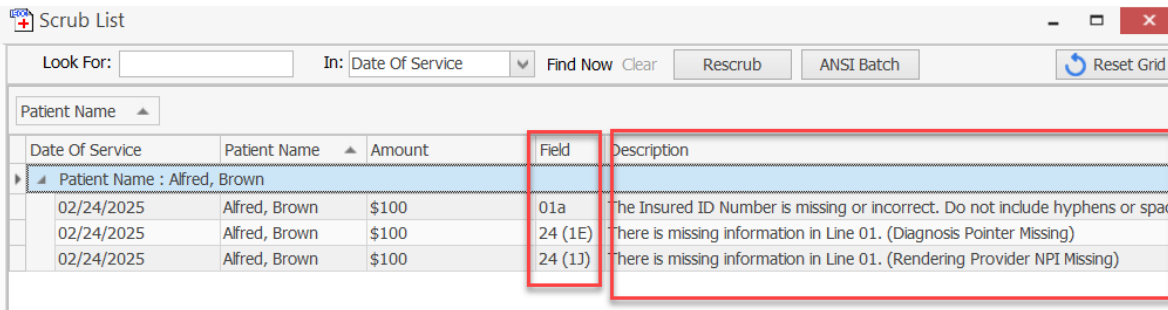
After highlighting your selected claim/s and selecting ANSI Batch you will get the following scrub result window.



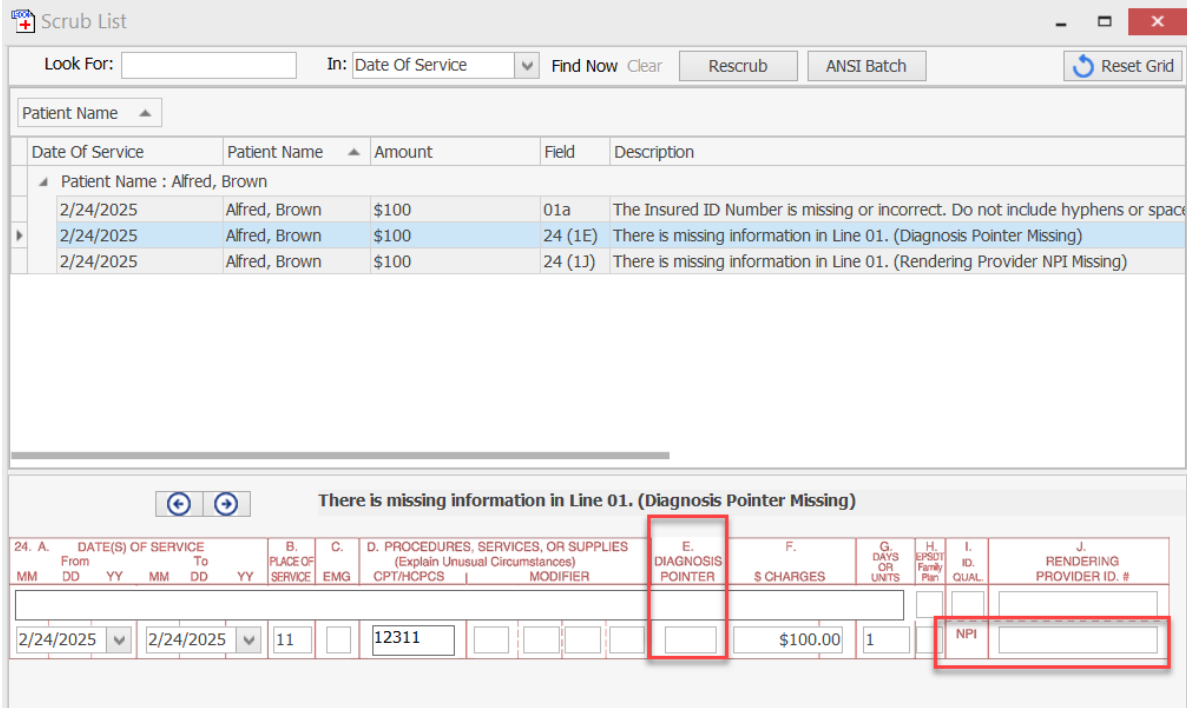
Select Results to get the next window. If the results show no errors, continue to ANSI Batch



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.

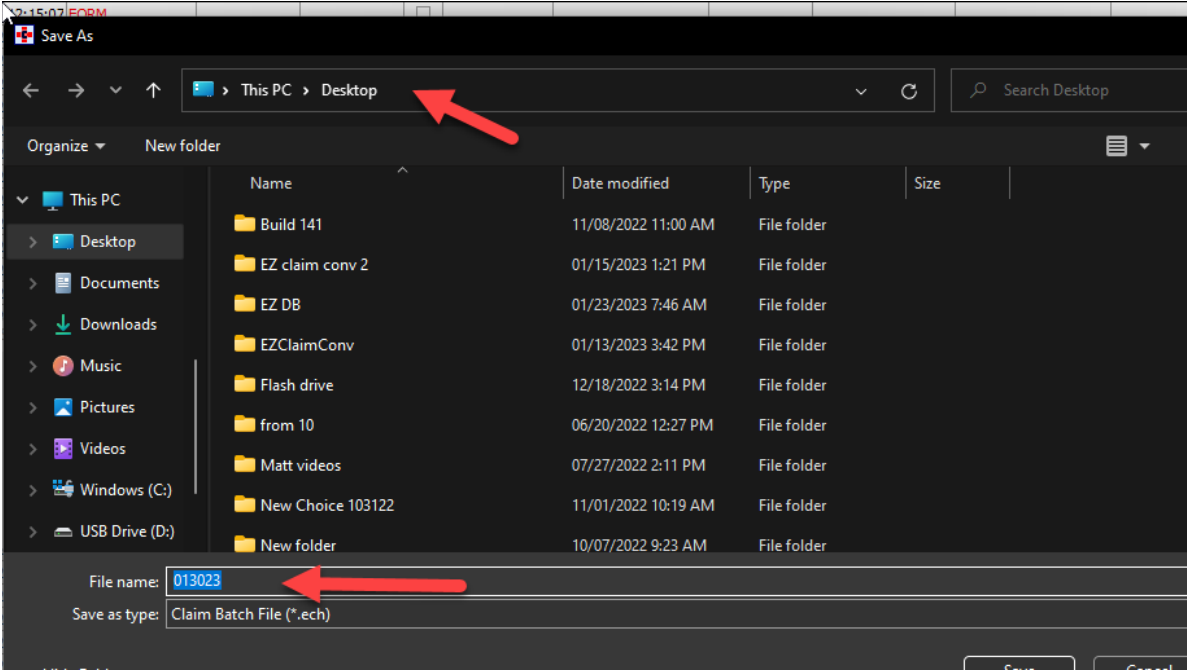


When you select a line item, it will display the corresponding section from the form below. Changes can be made or added here to correct the claim. The changes will also be saved to your claim in Speedy Claims. Once you correct the detected scrub issues, The example shows data missing in fields 24E and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

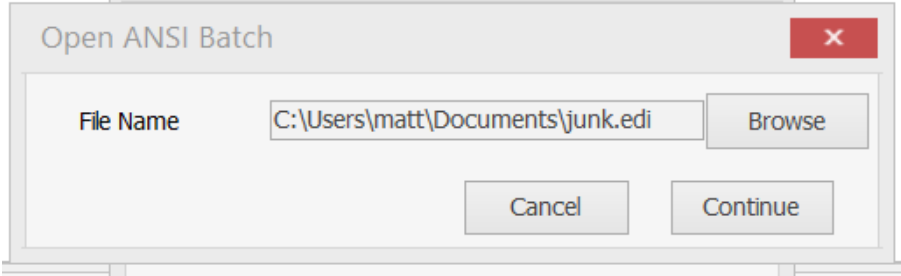


Rescrub to get the message that "The selected Claim(s) does not contain any error". Continue by selecting ANSI Batch from the button above

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

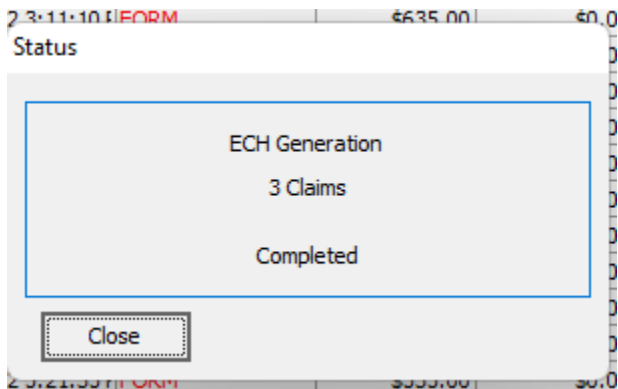


After saving, you will receive a follow-up window confirming the save path.

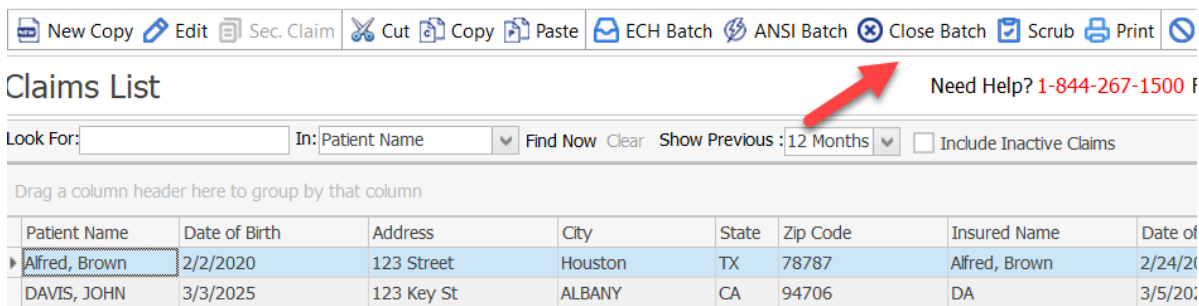


Select Continue to complete your ANSI Batch creation

Close the confirmation window



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



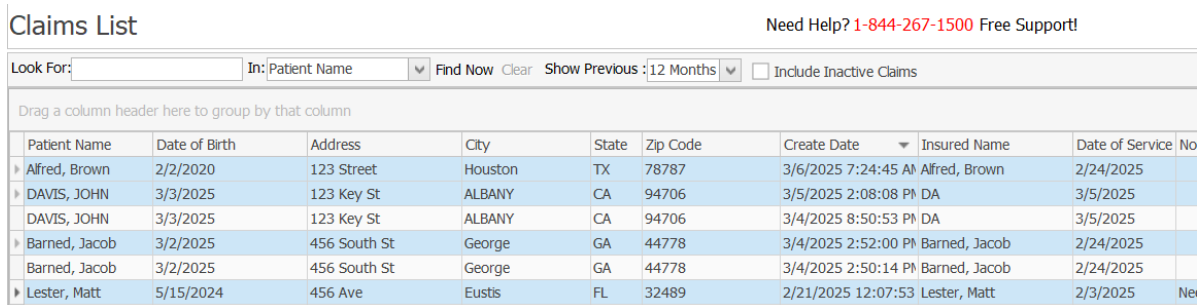
NOTE. While the Batch is still open, additional claims can be added to the file you have started and created. Once closed, it is ready to upload to your clearinghouse.

Repeat Claims in seconds!

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.



Using the F9 function key, NEW claims with today's service date 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 Find Now 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
Lester, Matt	5/15/2024	456 Ave				3/19/2025 11:12:36	Lester, Matt	3/19/2025
Barned, Jacob	3/2/2025	456 Sout				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 Stree				3/19/2025 11:12:36	Alfred, Brown	3/19/2025
Alfred, Brown	2/2/2020	123 Stree				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 Sout				3/4/2025 2:52:00 PM	Barned, Jacob	2/24/2025
Barned, Jacob	3/2/2025	456 Sout				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

Close

This function can be done by right-clicking on a highlighted claim or group of claims. On the popup window, click on **Recreate**.

med, Jacob	3/2/2025	456 South St	George	GA	44778	Barned, Jacob	2/24/2025	3/4/2025 2:52:00 PM	SAVE
------------	----------	--------------	--------	----	-------	---------------	-----------	---------------------	------

Multiple Records Selected

New Copy Edit Delete Archive Restore Print ECH Batch Sec. Claim Scrub Envelope ANSI Batch **Recreate**

tt, Lester	5/6/2024	7887 SW Way	Eustis	FL	45645	Matt, Lester	5/5/2025	5/8/2025 12:04:20 F White Cross	FORM
------------	----------	-------------	--------	----	-------	--------------	----------	---------------------------------	------

On the next pop-up, simply select to recreate claims for today's date of service or 1 week from existing date of service.

Service Date Selection

Set Service Date

Advance 7 Days

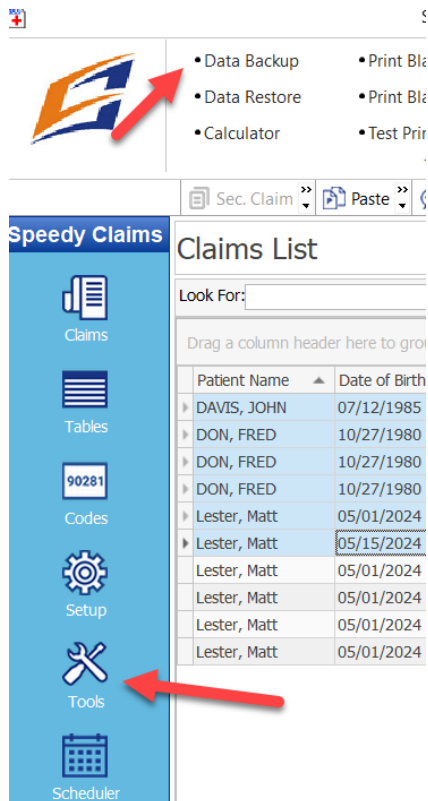
Today **2/19/2026**

Custom

Cancel Continue

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

Backing up Your Data Correctly!

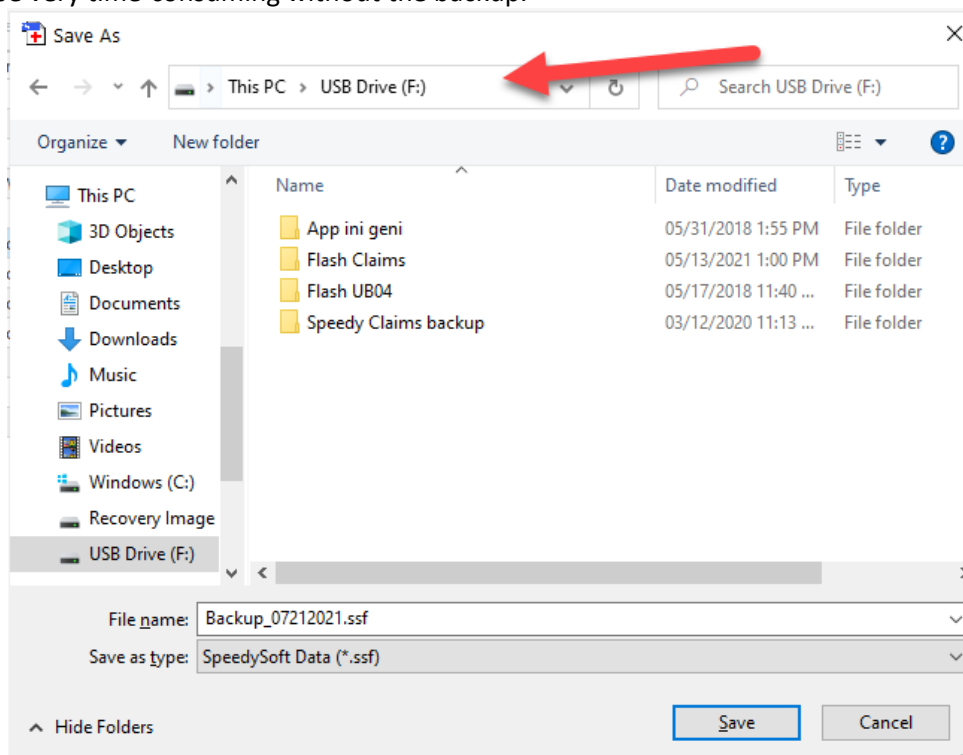


It is very important to save your data off your computer frequently in case of a computer crash. That backup is an encrypted copy of your database and is only used to restore into Speedy Claims.

Select Tools on the left column and 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 extra protection in case of a crash, saving the backup off the computer will significantly reduce the risk of losing all your records. A new install of the software and license transfer 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 off the main computer where the program is installed and the database is located. Reinstalling the program is easy, but Re-entering all of your data can be very time-consuming without the backup.



As shown in the File name, the backup file name includes the date it was created so you can easily find the most recent in the need for a restore on a new install.

As you can see, Speedy Claims is very easy to use and master. If you need more help or instruction, please visit the help file within the software or contact FREE support at

Email - customerservice@speedysoftusa.com

Toll Free – 844-267-1500

NOTE!!

To comply with HIPAA requirements and for security and privacy concerns certain files within Speedy Claims are encrypted and/or password protected. Do not tamper with them.

Attempting to open them outside of or using any program other than Speedy Claims WILL corrupt the database and you will lose all your data. It will not be able to be recovered.

The two most commonly corrupted in this manner are:

- The Speedy Claims database
- The Speedy Claims backup file

Problems arising from tampering with these files may not covered under Free Support