



**More Time Healing . . . Less Time Billing!**

## **Imagine creating a HCFA form in 20 seconds!**

### **Features included with Easy Billing**

- Line Item Payments.
- Timely Billing reports.
- Patient Balance / Insurance Pending.
- Superbill Receipt and Patient Statements.
- Aging, Statistics, Insurance Co. Reports, Recall.
- Daily, Monthly & Master Reports
- Comments Screen for collection and SOAP notes.
- HCFA 1500 insurance form and box #'s on each screen.
- On-screen help throughout entire program.
- Insurance, Attorney and Referral databases.
- Guaranteed HCFA form alignment.
- And so much more, download a demo today.

[To learn about the right package for you:](#)

**Each Easy Billing program is expandable at any time to include:  
Internet Electronic Billing, Networking, Additional Providers & Groups,  
and Digital Imaging.**

'Easy Billing is the best system that I have used. Using the system these past six months has proven to me that medical billing does not have to be a nightmare. Easy Billing is definitely a time saving push button system, simplifying your patient records, billing, and insurance needs. It's the best.'

Gerald Swain  
Chiropractic Assistant

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## Easy Billing Price List

To order, check the box next to the item and select the appropriate platform if applicable. Then press the Order button at the bottom.

Easy Billing Gold 6.0 Programs		Platform
Single Provider	\$449.00	
5 Providers, Electronic Capability	\$799.00	
5 Providers, Electronic & Networking (FileMaker Pro is required) Capability	\$1299.00	
Easy Billing Gold/AP Easy Merge	\$1999.00	
AppointmentMaker	\$349.00	
Service Contract		
Monthly Service Contract - added to each program	\$24.95	
Upgrades and Updates		
Easy Billing Gold Update	\$339.00	
*Upgrades (from Lite or Standard to Gold)	\$449.00	
*Easy Billing Gold/APMerge Upgrade (coming soon)	\$599.00	
**Import & Conversion for Gold program	\$225.00	
Extras		
Easy Billing Tutorial Video	\$49.00	
Easy Healthcare Workbook	\$39.00	
Additional Providers (5)	\$149.00	
Electronic Billing Capability	\$299.00	
Digital Imaging Capability (2 per pt.)	\$200.00	
Networking Per Station (FileMaker Pro required for each)	\$200.00	



## Easy Billing Gold Programs

Easy Billing Gold is available in three different packages. You can start with what you need, and add features as your business expands. Additional providers, electronic billing and networking capability can be added any time. [View Screenshots](#)

[Easy Billing Gold 6.0](#) At \$449.00 is for the single provider and is the perfect choice for many independent practitioners.

[Easy Billing Gold 6.0 Classic](#) For \$799.00 starts with 5 providers and is capable of electronic billing.

[Easy Billing Gold 6.0 Deluxe](#) Only \$1299.00 with 5 providers. It also includes electronic billing and networking capability for 3 stations.

[Easy Billing Gold/AP Easy Merge](#) has all the features of Gold, and it merges with [AP Easy](#) to form a comprehensive billing system for pathologists.

[AppointmentMaker](#) is a comprehensive scheduling application that integrates with all Easy Billing programs (purchased separately).

See Also:

The [Easy Healthcare Office Management Workbook](#)

The [Easy Healthcare Office Management Seminar](#) Series



[Download a Demo!](#)

[Buy Easy Billing Gold Online!](#)

You can start with the basic package and later add more providers, electronic billing, and networking.

### **Features included with Easy Billing Gold**

- Line Item Payments
- Superbill Receipt and HCFA 1500 insurance form.
- HCFA 1500 box numbers on each screen.
- On-screen help throughout entire program.
- Comments Screen for collection and SOAP daily notes.
- 15 Built-in Choices of HCFA 1500 alignment
- Custom HCFA alignment guaranteed.
- Insurance, Attorney and Referral databases.
- All reports have a preview-before-print option.
- Unlimited Custom Default Letters.
- Procedure Defaults For Each Patient.

### **Reports:**

- Daily and Daily Transaction
- Monthly Summary & Master
- Previous Balance Report
- Creation and Printing Date
- Patient Statements
- Ledger Cards
- Timely Billing Proof
- 30-60-90 Day Aging
- Patient Statistics
- Procedure Codes
- Open Invoice Patient
- Insurance Company
- Insurance Verification
- Lists, Labels, Envelopes & more



[Download a Demo!](#)

[Buy Easy Billing Gold Online!](#)

## Features included with Easy Billing Gold

- Line Item Payments
- Superbill Receipt and Patient Statement with Ins. Pending.
- HCFA 1500 insurance form and box numbers on each screen.
- On-screen help throughout entire program.
- Comments Screen for collection and SOAP daily notes.
- 15 Built-in Choices of HCFA 1500 alignment
- Custom HCFA alignment guaranteed.
- Insurance, Attorney and Referral databases.
- All reports have a preview-before-print option.
- Unlimited Custom Default Letters.
- Procedure Defaults For Each Patient.

### Expansion Pack includes:

- Internet Electronic Billing
- 5 providers

### Reports:

- Daily and Daily Transaction
- Monthly Summary & Master
- Previous Balance Report
- Creation and Printing Date
- Patient Statements
- Ledger Cards
- Timely Billing Proof
- 30-60-90 Day Aging
- Patient Statistics
- Procedure Codes
- Open Invoice Patient
- Insurance Company
- Insurance Verification
- Lists, Labels, Envelopes & more



[Download a Demo!](#)

[Buy Easy Billing Gold Online!](#)

## Features included with Easy Billing Gold

- Line Item Payments
- Superbill Receipt and Patient Statements with Ins. Pending.
- HCFA 1500 insurance form and box numbers on each screen.
- On-screen help throughout entire program.
- Comments Screen for collection and SOAP daily notes.
- 15 Built-in Choices of HCFA 1500 alignment
- Custom HCFA alignment guaranteed.
- Insurance, Attorney and Referral databases.
- All reports have a preview-before-print option.
- Unlimited Custom Default Letters.
- Procedure Defaults For Each Patient.

### Deluxe Expansion Pack includes:

- Internet Electronic Billing
- Networking capability with FileMaker Pro
- 5 providers

### Reports:

- Daily and Daily Transaction
- Monthly Summary & Master
- Previous Balance Report
- Creation and Printing Date
- Patient Statements
- Ledger Cards
- Timely Billing Proof
- 30-60-90 Day Aging
- Patient Statistics
- Procedure Codes
- Open Invoice Patient
- Insurance Company
- Insurance Verification
- Lists, Labels, Envelopes & more



Easy Billing Gold/AP Easy Merge features the following:

- Accession numbers, patient data and procedure codes auto-fill from [AP Easy](#)
- Networking Capability
- Multi-provider Capability
- 30-60-90 Day Aging
- HCFA 1500 box numbers on each screen.
- On-screen help throughout entire program.
- All reports have a preview-before-print option .
- Patient Statistics - Includes new and repeat patient visits. Calculates average procedures and charges. Generated by date, date range and provider.
- Procedure Codes Report - procedure codes by date or data range.
- Open invoice patient reports.
- Insurance company reports.
- Unlimited Custom Default Letters to Attorney's, Patients, Insurance Companies and Referrals.
- 15 Built In Choices of HCFA 1500 alignment - Plus, we will custom align the form for you... Guaranteed!



## Easy Billing Gold Report Samples

Please click on a link to view a full-size sample report. The reports will load in a new browser window. To view the full report, maximize the browser window.

[Daily Report](#) Daily Report with invoice totals.

[Daily Transactions Report](#) Including each procedure and invoice totals.

[Master Report](#) Invoice totals sorted by date, date range, or provider(s).

[Monthly Summary Report](#) Monthly totals, sorted by year or month.

[Aging Report](#) 30-60-90 Day Aging.

[Insurance Company Report](#) Great for tracking charges and payments; sorted by Dates and Insurance Company.

[Open Invoices Report](#) Shows patient invoices that still have a balance due.

[Patient Balances Report](#) Sorts by Last Name; includes total charges, payments, adjustments and balance due.

[Patient Balance - Payment Type Report](#) Sorts by Type of Payment; displays total charges, payments, adjustments and balance due.

[Patient Statistics Report](#) Includes new and repeat visits. Calculates average procedures and charges. Generated by date, date range and provider(s).

[Statistics Summary Report](#) A concise version of the above report.

[Printing & Creation Date Reports](#) Tracks invoices and Electronic billing, Superbills, and HCFA forms.

[Sample Ledger Card](#) Statement displaying previous balance, current month's activity and balance due.

[Sample Attorney Letter](#) Shows the patient totals, last date of treatment and an inquiry into the status of the case.

# DAILY REPORT FOR 12/4/00

Patient	Acct. #	Net Charges	Tax	Charges	Adjustments	Payments	Balance
Jones, Michele L	3000	80.00	0.00	80.00			Pt Bal: \$185.00
Oakley, John L	3003	55.00	0.00	55.00			Pt Bal: \$0.00

# TRANSACTION REPORT FOR 12/4/2000

<u>Prov.</u>	<u>Patient</u>	<u>Acct. #</u>	<u>Net Charges</u>	<u>Tax</u>	<u>Charges</u>	<u>Adjustments</u>	<u>Payments</u>	<u>Balance</u>
Jones, Michele L			3000					
1	12/04/00	1503-1	Office Visit	55.00	0.00	55.00		
1	12/04/00	1503-2	Hot Packs	25.00	0.00	25.00		
			Totals:	80.00	0.00	80.00		Pt Bal: \$185.00
Oakley, John L			3003					
1	12/04/00	1508-1	Office Visit	55.00	0.00	55.00		
			Totals:	55.00	0.00	55.00		Pt Bal: \$0.00

**MASTER REPORT FOR 12/1/2000 to 12/31/2000**

Month / Patient		Net Charges	Tax	Charges	Adjustments	Payments	Balance Due:
Provider #02 Sharon Obrien							
<b>Provider #02 Sharon Obrien</b>							
<b>December 2000</b>							
Bowden, Jordan L		3001					
12/02/00	1501-1	Office Visit	55.00	0.00	55.00		
12/02/00	U1001	Cash				55.00	
12/02/00	U1015	Reversal of Pmt #U1001				-55.00	
12/09/00	1504-1	Office Visit	55.00	0.00	55.00		
		Totals:	110.00	0.00	110.00		0.00
Brown, Charles M		3002					
12/02/00	1502-1	Office Visit	55.00	0.00	55.00		
12/02/00	1502-2	Massage Therapy	60.00	0.00	60.00		
12/10/00	1505-1	Office Visit	55.00	0.00	55.00		
12/10/00	U1002	cash				55.00	
12/31/00	U1009	cash				50.00	
		Totals:	170.00	0.00	170.00		105.00
		Net Charges					
December '00 Totals:		\$280.00	\$0.00	\$280.00		\$105.00	
Total for Provider		#02	280.00	0.00	280.00	105.00	\$175.00

## Monthly Summary for 11/1/2000 to 3/31/2001

(transactions dated 11/1/2000 to 3/30/2001)

Month	Net Charges	Tax	Charges	Adjustments	Payments	Balance Due:
<b>Provider #01 James White:</b>						
January '01	80.00	0.00	80.00			
March '01	80.00	0.00	80.00		55.00	
November '00	330.00	0.00	330.00			
December '00	320.00	0.00	320.00	190.00	50.00	
Prov. #01 Totals:	\$810.00	\$0.00	\$810.00	\$190.00	\$105.00	

## Monthly Summary for 11/1/2000 to 3/31/2001

(transactions dated 11/1/2000 to 3/30/2001)

Month	Net Charges	Tax	Charges	Adjustments	Payments	Balance Due:
<b>Provider #02 Sharon Obrien:</b>						
December '00	280.00	0.00	280.00		105.00	
Prov. #02 Totals:	\$280.00	\$0.00	\$280.00		\$105.00	

## Monthly Summary for 11/1/2000 to 3/31/2001

(transactions dated 11/1/2000 to 3/30/2001)

Month	Net Charges	Tax	Charges	Adjustments	Payments	Balance Due:
Grand Totals:	\$1090.00	\$0.00	\$1090.00	\$190.00	\$210.00	\$690.00

# Aging Report

Printed 4/11/2001

Sharon Obrien  
989 4th St.  
Santa Fe NM 87505  
505-333-3000

	<u>Total Balance</u>	<u>Current</u>	<u>Over 30</u>	<u>Over 60</u>	<u>Over 90</u>	<u>Bal. all Prov.</u>
3001 Bowden, Jordan L	360.00				360.00	\$360.00
3002 Brown, Charles M	390.00	125.00			265.00	\$340.00
2999 John , Howard	330.00				330.00	\$330.00
3005 Jones, Carrie	500.00				500.00	\$300.00
3000 Jones, Michele L	185.00	80.00			105.00	\$185.00

# Aging Report

Printed 4/11/2001

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	<u>Total Balance</u>	<u>Current</u>	<u>Over 30</u>	<u>Over 60</u>	<u>Over 90</u>	<u>Bal. all Prov.</u>
Grand Totals:	1765.00	205.00			1560.00	

**INSURANCE CO. REPORT FOR 11/1/2000...11/30/2000**

Prov.	Patient	Acct. #	Net Charges	Tax	Charges	Adjustments	Payments	Balance
Total for Blue Cross Blue Shield of NM:			670.00	0.00	670.00			
Blue Cross Blue Shield of NM		#01	James White					
John , Howard		2999						
1	11/01/00	1509-1	Office Visit	55.00	0.00	55.00		
1	11/03/00	1509-2	Office Visit	55.00	0.00	55.00		
1	11/05/00	1510-1	Office Visit	55.00	0.00	55.00		
1	11/08/00	1510-2	Office Visit	55.00	0.00	55.00		
1	11/08/00	1510-3	Office Visit	55.00	0.00	55.00		
1	11/16/00	1510-4	Office Visit	55.00	0.00	55.00		
Totals:			330.00	0.00	330.00			Pt Bal: \$330.00
Brown, Charles M		3002						
1	11/15/00	1514-1	Office Visit	55.00	0.00	55.00		
1	11/15/00	1514-2	Massage Therapy	60.00	0.00	60.00		
1	11/24/00	1516-1	Office Visit	55.00	0.00	55.00		
Totals:			170.00	0.00	170.00			Pt Bal: \$340.00
Total for Provider		#01	500.00	0.00	500.00			\$500.00
<u>Current</u>	<u>Over 30</u>	<u>Over 60</u>	<u>Over 90</u>					
			480.00					

**INSURANCE CO. REPORT FOR 11/1/2000...11/30/2000**

Prov.	Patient	Acct. #	Net Charges	Tax	Charges	Adjustments	Payments	Balance
Blue Cross Blue Shield of NM		#02	Sharon Obrien					
Brown, Charles M		3002						
2	11/02/00	1502-1	Office Visit	55.00	0.00	55.00		
2	11/02/00	1502-2	Massage Therapy	60.00	0.00	60.00		
2	11/10/00	1505-1	Office Visit	55.00	0.00	55.00		
Totals:			170.00	0.00	170.00			Pt Bal: \$340.00
Total for Provider		#02	170.00	0.00	170.00			\$170.00
<u>Current</u>	<u>Over 30</u>	<u>Over 60</u>	<u>Over 90</u>					
0.00			115.00					

**INSURANCE CO. REPORT FOR 11/1/2000...11/30/2000**

Prov.	Patient	Acct. #	Net Charges	Tax	Charges	Adjustments	Payments	Balance
Grand Totals:			\$670.00	\$0.00	\$670.00			\$670.00
<u>Current</u>	<u>Over 30</u>	<u>Over 60</u>	<u>Over 90</u>					
0.00			595.00					

**Open Invoice:**

**Healing Center of America  
444 South Street  
Santa Fe, NM 87501  
505-000-0021**

**Patient:** Charles M Brown  
878 Rio Grande  
Santa Fe, NM 87504

<u>Date</u>	<u>Code</u>	<u>Description</u>	<u>Invoice/ Payment#</u>	<u>Net Charge</u>	<u>Tax</u>	<u>Charge Pd</u>	<u>Adjustments</u>	<u>Insurance Payments</u>	<u>Patient Payments</u>	<u>Balance Due</u>
Provider #01 James White:										
12/15/00	98940	Office Visit	1514-1	55.00	0.00	55.00	N			3
12/15/00	97124	Massage Therapy	1514-2	60.00	0.00	60.00	N			6
12/24/00	98940	Office Visit	1516-1	55.00	0.00	55.00	N			6
12/18/01	98940	Office Visit	1515-1	55.00	0.00	55.00	N			3
12/20/01	98940	Office Visit	1515-2	55.00	0.00	55.00	N			3
12/20/01	97124	Massage Therapy	1515-3	60.00	0.00	60.00	N			6
Totals:				340.00	0.00	340.00				
Total Payments:										
Balance Due for Provider #01:										27

**Open Invoice:**

**Sharon Obrien  
989 4th St.  
Santa Fe, NM 87505  
505-333-3000**

**Patient:** Charles M Brown  
878 Rio Grande  
Santa Fe, NM 87504

<u>Date</u>	<u>Code</u>	<u>Description</u>	<u>Invoice/ Payment#</u>	<u>Net Charge</u>	<u>Tax</u>	<u>Charge Pd</u>	<u>Adjustments</u>	<u>Insurance Payments</u>	<u>Patient Payments</u>	<u>Balance Due</u>
Provider #02 Sharon Obrien:										
12/02/00	98940	Office Visit	1502-1	55.00	0.00	55.00	N			6
12/02/00	97124	Massage Therapy	1502-2	60.00	0.00	60.00	N			6
Totals:				115.00	0.00	115.00				
Total Payments:										

**Open Invoice:**

**Sharon Obrien**  
**989 4th St.**  
**Santa Fe, NM 87505**  
**505-333-3000**

**Patient:** Charles M Brown  
878 Rio Grande  
Santa Fe, NM 87504

<u>Date</u>	<u>Code</u>	<u>Description</u>	<u>Invoice/ Payment#</u>	<u>Net Charge</u>	<u>Tax</u>	<u>Charge Pd</u>	<u>Adjustments</u>	<u>Insurance Payments</u>	<u>Patient Payments</u>	<u>Balance Due</u>
			Totals:	455.00	0.00	455.00				\$
Total Payments:										
Balance Due for Patient # 3002:										\$34

**Patient List      4/12/2001**

<u>Acct. No.</u>	<u>Patient's Name</u>	<u>Charges</u>	<u>Payments</u>	<u>Adjustments</u>	<u>Balance</u>	<u>Type of Payment</u>
3001	Bowden, Jordan L	360.00	0.00		360.00	Statement
3002	Brown, Charles M	510.00	170.00		340.00	Patient pays
2999	John , Howard	330.00			330.00	HMO / PPO #1
3005	Jones, Carrie	500.00	200.00		300.00	Patient Pays
3000	Jones, Michele L	240.00	55.00		185.00	Auto Collision
3003	Oakley, John L	240.00	50.00	190.00	0.00	Patient Pays
<b>Totals:</b>		<b>2,180.00</b>	<b>475.00</b>	<b>190.00</b>	<b>1,515.00</b>	

### Statistics for 10/1/2000...3/15/2001

Provider 01 (James White):

Patient Visits:	New	Regular	Total Visits	Total Patients	Avg Visits per Patient
	3	10	13	4	3.25
Charges:	Total Charges	Avg Chg/Visit	Total Procedures	Avg Chg/Procedure	Avg Procedures/Visit
	\$900.00	\$69.23	19	\$47.37	1.46

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Provider 02 (Sharon Obrien):

Patient Visits:	New	Regular	Total Visits	Total Patients	Avg Visits per Patient
	1	3	4	2	2
Charges:	Total Charges	Avg Chg/Visit	Total Procedures	Avg Chg/Procedure	Avg Procedures/Visit
	\$280.00	\$70.00	5	\$56.00	1.25

---

### Statistics for 10/1/2000...3/15/2001

#### Grand Totals

Patient Visits:	New	Regular	Total Visits	Total Patients	Avg Visits per Patient
	4	13	17	5	3.4
Charges:	Total Charges	Avg Chg/Visit	Total Procedures	Avg Chg/Procedure	Avg Procedures/Visit
	\$1180.00	\$69.41	24	\$49.17	1.41

### Statistics for 10/1/2000...3/15/2001

#### Grand Totals

Patient Visits:	New	Regular	Total Visits	Total Patients	Avg Visits per Patient
	4	13	17	5	3.4
Charges:	Total Charges	Avg Chg/Visit	Total Procedures	Avg Chg/Procedure	Avg Procedures/Visit
	\$1180.00	\$69.41	24	\$49.17	1.41

1508-1 3003	Oakley, John L	12 4 00	New		55.00	01
1508-2 3003	Oakley, John L	12 6 00		Regular	55.00	01
1508-3 3003	Oakley, John L	12 6 00			25.00	01
1508-4 3003	Oakley, John L	12 8 00		Regular	55.00	01
1508-5 3003	Oakley, John L	12 8 00			25.00	01
1508-6 3003	Oakley, John L	12 9 00		Regular	25.00	01
1509-1 2999	John , Howard	11 1 00	New		55.00	01
1509-2 2999	John , Howard	11 3 00		Regular	55.00	01
1510-1 2999	John , Howard	11 5 00		Regular	55.00	01
1510-2 2999	John , Howard	11 8 00		Regular	55.00	01
1510-3 2999	John , Howard	11 8 00			55.00	01
1510-4 2999	John , Howard	11 16 00		Regular	55.00	01
1514-1 3002	Brown, Charles M	12 15 00		Regular	55.00	01
1514-2 3002	Brown, Charles M	12 15 00			60.00	01
1516-1 3002	Brown, Charles M	12 24 00		Regular	55.00	01

Subtotals for Provider 01 (James White):

Patient Visits:	New	Regular	Total Visits	Total Patients	Avg Visits per Patient	
	3	10	13	4	3.25	
Charges:	Total Charges	Avg Chg/Visit	Total Procedures	Avg Chg/Procedure	Avg Procedures/Visit	
	\$900.00	\$69.23	19	\$47.37	1.46	

Provider 02 (Sharon Obrien):

1501-1 3001	Bowden, Jordan L	12 2 00		Regular	55.00	02
1502-1 3002	Brown, Charles M	12 2 00	New		55.00	02
1502-2 3002	Brown, Charles M	12 2 00			60.00	02
1504-1 3001	Bowden, Jordan L	12 9 00		Regular	55.00	02
1505-1 3002	Brown, Charles M	12 10 00		Regular	55.00	02

Subtotals for Provider 02 (Sharon Obrien):

Patient Visits:	New	Regular	Total Visits	Total Patients	Avg Visits per Patient	
	1	3	4	2	2	
Charges:	Total Charges	Avg Chg/Visit	Total Procedures	Avg Chg/Procedure	Avg Procedures/Visit	
	\$280.00	\$70.00	5	\$56.00	1.25	

**Processing dates: 12/1/2000 to 12/31/2000**

<b>Provider</b>	<b>Trans. Date</b>	<b>Inv #</b>	<b>Acct. #</b>	<b>Patient's Name</b>	<b>Charges</b>	<b>Payments</b>	<b>Adjust.</b>	<b>Bal. Due</b>	<b>Electronic</b>	<b>HCFA</b>	<b>SuperBill</b>
Sharon O'Brien	12/02/00	1501	3001	Jordan L Bowden	55.00	0.00		55.00			12/02/00
Sharon O'Brien	12/09/00	1504	3001	Jordan L Bowden	55.00			55.00			12/09/00
Sharon O'Brien	12/02/00	1502	3002	Charles M Brown	115.00			115.00		12/31/00	12/02/00
Sharon O'Brien	12/10/00	1505	3002	Charles M Brown	55.00	55.00		0.00		12/10/00	12/10/00
James White	12/04/00	1503	3000	Michele L Jones	80.00	0.00		80.00		12/04/00	
James White	1/02/01	1500	3000	Michele L Jones	80.00	55.00		25.00		12/31/00	
James White	12/04/00	1508	3003	John L Oakley	240.00	50.00	190.00	0.00	12/09/00	12/09/00	

**STATEMENT FROM:** Sharon Obrien  
 989 4th St.  
 Santa Fe, NM 87505  
 505-333-3000

**Patient:** Charles M Brown  
 878 Rio Grande  
 Santa Fe, NM 87504

<u>Date</u>	<u>Code</u>	<u>Description</u>	<u>Invoice/ Payment#</u>	<u>Net Charge</u>	<u>Tax</u>	<u>Charge</u>	<u>Pd</u>	<u>Adjustments</u>	<u>Insurance Payments</u>	<u>Patient Payments</u>	<u>Balance Due</u>	
12/02/00	98940	Office Visit	1502-1	55.00	0.00	55.00	N					
12/02/00	97124	Massage Therapy	1502-2	60.00	0.00	60.00	N					
12/10/00	98940	Office Visit	1505-1	55.00	0.00	55.00	Y					
12/10/00		cash	U1002							55.00		
12/15/00	98940	Office Visit	1514-1	55.00	0.00	55.00	N					
12/15/00	97124	Massage Therapy	1514-2	60.00	0.00	60.00	N					
12/24/00	98940	Office Visit	1516-1	55.00	0.00	55.00	N					
12/31/00		cash	U1009							50.00		
04/11/01		Insurance Payment	U1020						65.00			
12/18/01	98940	Office Visit	1515-1	55.00	0.00	55.00	N					
12/20/01	98940	Office Visit	1515-2	55.00	0.00	55.00	N					
12/20/01	97124	Massage Therapy	1515-3	60.00	0.00	60.00	N					
<b>Totals:</b>				<b>510.00</b>	<b>0.00</b>	<b>510.00</b>			<b>65.00</b>	<b>105.00</b>	<b>\$340.00</b>	
									<b>Total Payments:</b>	<b>170.00</b>		
<u>Current</u>	<u>Over 30</u>	<u>Over 60</u>	<u>Over 90</u>								<b>Balance Due for Patient # 3002:</b>	<b>\$340.00</b>
125.00			265.00									

4/13/01

Charlie Bailey, Esq.  
Bailey Attorney At Law  
222 Paseo Circle  
Santa Fe, NM 87504

Re: Michele L Jones                      Account No. 3000

This is to inform you of our most recent accounting of your client.  
Please return this letter so that we can update our records with any changes from your office or any information that we might be unaware of. Also, please let us know if these records appear incorrect. Thank you.

Total charges to date \$240.00

Total payments to date \$55.00

Total adjustments to date

Balance as of 03/30/2001 \$185.00

Last date of treatment 03/28/2001

Information we need from you:

Nearing settlement? yes / no    Approximate date \_\_\_\_\_

Going to trial?    yes / no    Date \_\_\_\_\_

Has settled?    yes / no

Still being treated by other physicians?    yes / no

Other: please explain \_\_\_\_\_

Sincerely,



## AppointmentMaker

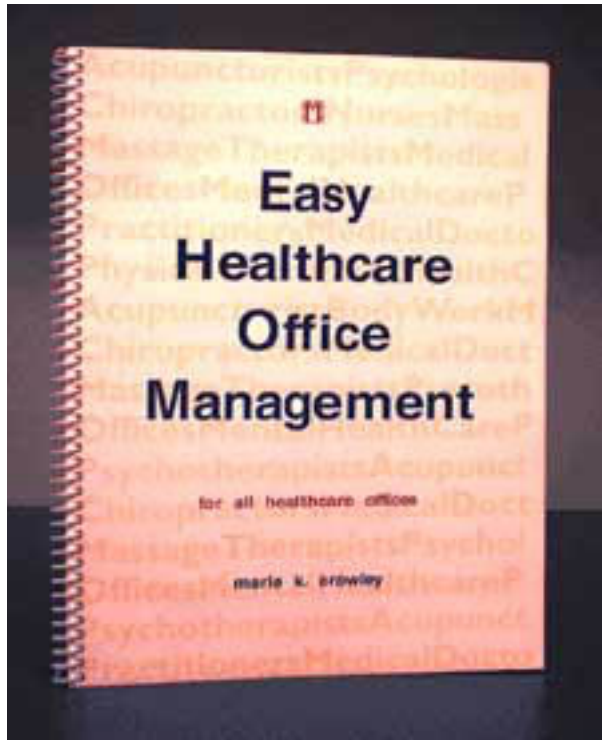
AppointmentMaker Integration Module is available for all [Easy Billing programs](#), providing an on-line appointment scheduling and management system for up to 56 different providers.

### AppointmentMaker's features include:

- Full Integration with Easy Billing
- Waiting Lists
- Cancellation Lists
- To-Do lists
- Daily and weekly schedule printouts
- Comprehensive on-line help
- Find feature to find appointments past, present, and future, for a given patient
- Customizable time slots for each provider, down to 10 minute increments
- Automated, customizable off-day and holiday setup



[Buy the Easy Healthcare Office Management Workbook Online!](#)



**Easy Healthcare Office Management Workbook  
by: Marla Crowley**

Managing a healthcare office just got **easy!** Marla Crowley, with over 10 years of medical office management and insurance billing, leads you step by step through the creation of a well managed, efficient and comfortable office.

The Easy Healthcare Office Management Workbook offers simple-to-follow, detailed guidance on how to create practical logical and workable office systems, from how to handle the first call for an appointment to processing insurance claims.

**The Workbook covers:**

- 155 pages with Worksheets
- Opening & Closing an Office
- Sign In Sheet
- To Do Lists
- Telephone Scripts
- New Patient Intake Forms
- Assignment Of Benefits
- Scheduling
- Tracking Charges
- Insurance Information
- Insurance Billing
- Electronic Billing
- Sample Letters
- Collections
- Creating An Office Manual
- Employee Management
- Questions To Ask In An Interview
- Sample Job Description
- Office Meetings
- Marketing Ideas And Worksheets



## Easy Healthcare Office Management Seminars featuring Marla Crowley

Marla Crowley is the programmer and designer of Easy Billing Software. With 10 years experience co-owning and managing a busy multi-provider office, she has answers to virtually every question regarding insurance billing and healthcare office management.

In the seminar you will learn simple efficient office procedures such as:

- Collections
- Ledger Cards
- New Patient Intake Forms
- Attorney Letters
- Using Routing Slips
- Writing an office Procedures Manual

And... an in depth look at Easy Billing Gold!

- Current and new features of Easy Billing
- Unlock the power of the "find" feature
- Shortcuts
- Batch Printing
- Re-lookup
- Electronic Billing

[read more...](#)



[back...](#)

We start with a free overview of the Easy Billing Program, then continue the Easy Healthcare Office Management seminar on office management procedures.

The seminar and materials help provide a variety of Insurance Billing and Practice Management guidelines, referring to the Easy Billing program for examples. The Easy Healthcare Office Management workbook is used extensively during the seminar.

Easy Billing is designed to print on to HCFA 1500 forms or sent electronically, and it also produces many reports, superbills, ledger cards, letters, and envelopes.

- Are you turning insurance patients away because your billing system is too difficult or antiquated?
- Are you in a cash based practice because you don't know an efficient way to process claims?
- Are you looking for ways to make your office/clinic less stressful and more efficient?

**This Seminar Series is the Answer!**

Call 800.618.6136 for the current seminar schedules and rates.

# Demo for Easy Billing Gold:

## Easy Billing Quick Reference Guide - Getting Started

### Accessing your Easy Billing Program:

Steps: 1. Open your Easy Billing Program by clicking the FileMaker Pro user icon.

This will take you to the Easy Billing screen.

### AppointmentMaker:

AppointmentMaker is installed with your demo. However, if you are installing the AppointmentMaker Demo separately, copy and paste the AppointmentMaker files into the Easy Billing Demo folder. There are very extensive help screens to guide you through the use of the AppointmentMaker program. Call for the current price of AppointmentMaker.

### Buttons

The program is button driven. Press the buttons on the screen to move back and forth through the program, print reports, etc. The buttons are color coded, blue is for New, yellow is to Print, green is to Go From Screen to Screen, peach is to Find, and red is to Close Program.

### Pulling up a Patient Account

Select the screen you wish to work in, press the "Find" button, enter the patient account number, and press the "Find" button again. To modify data, put the cursor in the field, delete by backspacing over the data or highlight the field and press the "Delete" key, then enter new data. In the Patient Info screen you can delete records by pressing the Delete Record button. It will delete one record at a time. Do not delete any patient account number that has HCFA invoices created.

### Method of Entry

Tab through the fields on the screen, typing information into each field.

**Note: Fields and Box # on HCFA 1500 Form** - The blue numbers on the screen indicate the number of the box # on the HCFA 1500 Form.

**Help Screens** - The question mark on each screen will give you access to the help screens for that layout. You can then enter your help comments on each screen. Each help screen can be printed.

### Reports

The report feature allows you to print patient lists and produce reports to your custom needs.

You may produce a daily report for one provider or all providers, for one day or three days. The possibilities are almost unlimited!

### Printing Lists, Labels, Letters or Envelopes

When printing letters, envelopes, lists, or labels press the "Find" button on the screen and create a Found Set by entering data and pressing the "Find" button again. Then press the relevant button, then press the "Print" button.

The patient list will print automatically.

The birthday list will wait for you to put the number of the month in the Mo. field.

**Note:** For easy reference, the numbers in the manual to the left of the data entry instructions refer to the corresponding box numbers on the HCFA 1500 insurance form.

## Entry Screens

Listed below are all the screens available in Easy Billing and a brief summary of the procedures. Documents produced from the screen are listed in italics.

### 1. Provider's Setup

- Click on the book tool to locate an empty screen to enter the next new provider.
- Type your company information for each provider.
- Type the Provider information for each individual provider.
- *Provider's List*

### 2. Diagnosis Codes

- To enter a new code, press the "New Code" button. The next available # will automatically appear.
- Type the Diagnosis Code number.
- Type the Diagnosis Code description.
- Print a list to use in your office. Manually circle the code to be entered in the computer for each patient.
- *Diagnosis Codes List*

### 3. Procedure Codes

- To enter a new code, press the "New Code" button.
- Type the code, the description, the tax percent, and the \$ amount for each procedure. Procedure codes must be unique. (e.g. 99080, 99080-1, 99080-2, or 99080-A, 99080-B)
- *Procedure Codes List*

### 4. Patient Info

- Press the "Patient Info" button to go to the Patient Info screen.
- Press the "New Patient Auto Increment" button to automatically assign an account # to this Patient. Press the "New patient Custom Account #" button to enter your own account numbers for your patients. New patients are always entered on this screen.

**Press the Insurance Company Set-Up, Referral Set-Up or Attorney Set-Up** button to enter information into a separate data base to then later auto fill from the yellow fields when setting up a new patient in the Patient Info, Medical Info and Insurance Info screens.

- Press the Referral # and Attny # fields to get a pull down menu to select and auto fill the information from the Attorney and Referral Set-Up screens.
- Letters - Press the "Default Letters" button to go to the letter default screen to create an unlimited number of letters to use. This screen can also be used to set up templets for narratives and re-exam reports.

**Available from Patient Info**

Attorney List, Patient List & Birthday List  
Patient Envelope, Referral Envelope & Labels  
Unlimited Letters Available, Attorney Letter & View Letters  
Attorney Set-Up, Referral Set-Up & Insurance Co Set-Up

## 5. Medical Info

- Press the "Medical Info" button to continue entering information on the same new patient. The patient you are entering will automatically appear with the name and patient account number from previously entering it in Patient Info screen.
- Press the numbered (1-4) "Diagnosis Code" button to the left of the Diagnosis Code description. Enter a code or description or leave blank and press Continue. You will then see a screen of all the codes with the same code numbers in common. Click your cursor on the correct diagnosis description to get back to the Medical Info screen to enter the next code.

## 6. Insurance Info

- Press the "Insurance Info" button to continue entering information on the same new patient.
- Press the "Select 1" button when your billing will go to the Primary Care provider and type the information in that section.
- The Secondary and Third company fields are additional places to submit paper work when the time is appropriate. For example, you might enter the patient's health insurance co. for use when auto insurance is no longer appropriate. (You will click Select 2 or Select 3.)
- Use the pull down fields "Insurance Co Acct # 1, 2 or 3" to auto fill the insurance companies that were entered in the Insurance Co Set-Up screens.
- If there aren't any insurance companies to bill but you want to send the original HCFA to an attorney, enter the attorney information here in one of the insurance co fields.

## 7. Insurance Verification

- Press the "Insurance Verification" button to continue entering the same new patient. Most of the insurance information and patient information will be brought forward.
- Call the insurance company and ask the questions next to the fields. Type the answers in the appropriate fields

## 8. Carry Over

- To bring a patient forward, Press the "Carry Over" button in the Patient Info screen.
- Type the previous Total Charges. Click "Done" if that is also the balance due. Click "Continue" to enter Total Payments, and Total Adjustments in the appropriate fields from your previous accounting records. Balance due will automatically calculate, or you may enter the Balance Due amount only, by entering it in Total Charges. Enter a credit balance in the Payments screen as a New Payment "Apply All On Account".

## 9. Easy Billing

- Press the "New Transaction" button and type the account number of a patient already entered in the Patient Information screens. Press TAB to bring the information forward.
- Enter a procedure code and TAB.

**To Delete charges: Press the trash can button to delete a charge that a payment or adjustment has not yet been applied.**

- To produce an HCFA 1500 form, a Super Bill or send your claims electronically, enter the date and procedures, then, press the "Print Super Bill", "Print HCFA", or "Electronic Billing" button. You may want to create a Found Set for batch printing or sending electronically.
- The date the Super Bill, HCFA or Electronic billing is produced appears in the Printing Date field, and is automatically printed on the top of the HCFA form.
- Billing Envelope, Super Bill, HCFA 1500 Insurance Form, Electronic Billing.

## 10. Comments/ SOAP Daily notes

- Press the "New Transaction" button, type a patient's account number and TAB to bring the information from Patient Info.
- Press the "Date" button. The current date and time are automatically entered on the next available line.
- Type the information you wish to record regarding the patient's account.
- Click the "Not Complete" square when you need to do follow-up work.
- Press the "Find Not Complete" button to bring up all the accounts that need follow-up work or print records.
- Comments/SOAP Daily notes for each patient

## 11. Payments

- Press the "New Payment" button to enter the patient account number, then TAB. Enter the payment amount. Press either "Apply on Account" or "Specific Procedures" to begin applying the payment.
- Type the Patient's account number and TAB. The patient information will appear.
- Type the payment, adjustment, and the payment/adjustment description.

## 12. Reports

- To create any report, press the specific report button, enter the data, such as the patient's account number used for Ledger Cards or Attorney Letter, the date or range of dates for the Daily Report, Monthly Summary, Master Report and Patient Balances, Statistics, Procedure Reports, Insurance Company Reports or the Provider # when you want reports separated by provider.
- Press the "Continue" button when prompted to preview the report. Then the printing screen will appear. Click "Records Being Browsed" when printing a report or letter with more than one date or patient. Click "Print Current Record" when printing a report or letter with one invoice.
- Reports: Daily, Monthly Summary, Master Report, Statistics, Aging, Procedure Reports, Insurance Co., Patient Balances (by name or Type of Insurance) Ledger Cards/Statements, and Attorney Letter.

## Quick Reference for Printing

### How to print a Super Bill or HCFA 1500 form for a patient having services done today.

1. Press the "Easy Billing" button to go to the Easy Billing screen.
2. Press the "New Transaction" button. Enter the patient's account # and press the TAB key.
3. Enter Data Input Initials. TAB
4. Click on the provider's number who performed the services. The name will appear. TAB. Today's date will automatically appear. TAB
5. Enter today's date in Dates From, then TAB over to procedure code and enter code. TAB. The amount of charge will appear. TAB Enter Modifier, TAB, enter Diagnosis. TAB
6. Then TAB through Units, EPSTD, EMG and COB entering data according to your office procedures. Enter any other codes for that day following this procedure.
7. Click "Payment in Full" or enter the partial payments in the Payments Menu, then TAB.
8. Enter printing initials. TAB
9. Press Print Super Bill, or Print HCFA. The HCFA 1500 form or Super Bill (on white paper) will be generated through your printer.
10. To print, click the Continue button.

### Processing Payments and Adjustments How to process a payment brought or mailed into the office.

1. Press the "Payment" button to get to Payments.
2. Press the "New Payment" button and enter the patient's account number. TAB
3. Click on the Provider's # and the provider name will fill in automatically. TAB
4. Enter the payment amount, description, insurance or patient payment and the date of the payment. Click the "Apply To Specific Procedure Charge" or "Pmt. On Account To Apply Later".
5. To apply to a specific procedure click on the blue colored "code #" button to apply the payment to a specific charge.
6. Enter if there is an adjustment. If no adjustment, leave blank. TAB
7. Continue applying to procedures until the payment amount is used.

### Reports have a preview option before printing.

#### Attorney Letter

1. Press the "Reports" button to get to Reports.
2. Press the "Print Attny letter" button.
3. Enter a patient account #.
4. Press the "Continue" button to print.

#### Daily Report & Daily Transaction Report

1. Press the "Reports" button to get to the Reports screen.
2. Press the "Daily Reports" button.
3. Enter the date for which you wish to generate a report.
4. Press the "Daily Report (Summary)" or "Daily Transaction Report" button.
5. Press "Continue" to print the Daily or Daily Transaction Report.

#### Ledger Card/ Ledger Summary Ledger Statement

1. Press the "Report" button to go to the Reports screen.
2. Press the "Print Ledger Cards (Statements)" button.
3. Enter the patient's account #. TAB
4. Press the "Continue" button to print.

### **Master Report**

How to print a report showing all transactions that have taken place from one date to another.

1. Press the "Reports" button to get to Reports.
2. Press the "Master Report" button.
3. Enter a Date From and Date To, using a 4 digit year.
4. Press the "Continue" button to print.

### **Monthly Summary**

1. Press the "Reports" button to get to Reports.
2. Press the "Monthly Summary" button.
3. Enter a Date From and Date To, using a 4 digit year.
4. If you choose a specific provider, it will show the report for that provider alone.
5. Press the "Continue" button to print the report.
6. Press the "Continue" button to print.

### **Patient Balances & Patient Balances by Type of Payment**

How to generate a report showing total patient charges, payments, adjustments, and balance due.

1. Press the "Reports" button to get to Reports.
2. Press the "Print Patient Balances" button to print the accounts receivable report alphabetically by last name. Press the "Patient Bal. Type of Pay." button if you want the report to be sorted by Type of Payment.
3. Press the "Continue" button to print a report.

### **Patient List**

1. Press the "Patient Info" button to get to Patient Info.
2. Press the "All Patient's List" button.
3. Press the "Continue" button to print.

### **Statistics Report, Insurance Company, Aging, Procedure Codes Report**

How to print a report for a day or date range.

1. Press the "Reports" button to get to the Reports screen.
2. Press the "Statistics" button. (Or choose another report.)
3. Enter the date or date range, enter a specific provider if you want the report for one provider only. Leave blank for the entire office.
4. Press the "Continue" button to print.