



UB-04 SOFTWARE HCFA-1500 Fill and Print eDirect Software User Manual

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UB-04 SOFTWARE HCFA-1500 Fill and Print eDirect Software



Welcome!

Please enjoy our software.

If you have any questions, comments, problems, solutions, compliments, or issues,

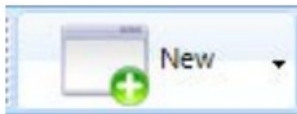
please contact us!

UB04software.com Customer Service E: Support@UB04software.com P: 866.829.2763 | F: 866.795.4975 W: www.UB04software.com

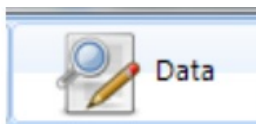
New Toolbar!





Replaces



- **Blank Form with Prefills**
Create a brand-new, blank form that includes your Prefills
- **Blank Form**
Create a brand-new, blank form.
- **Form for Patient (+ Page)**
Create a new page for the Current Patient Removes data in Box 24A – J



- **Save** 
 - Save your current form.
 - Adjust this button's function in Options > Load/Save

- **Load** 
 - Load a form.
 - Adjust this button's function in Options > Load/Save



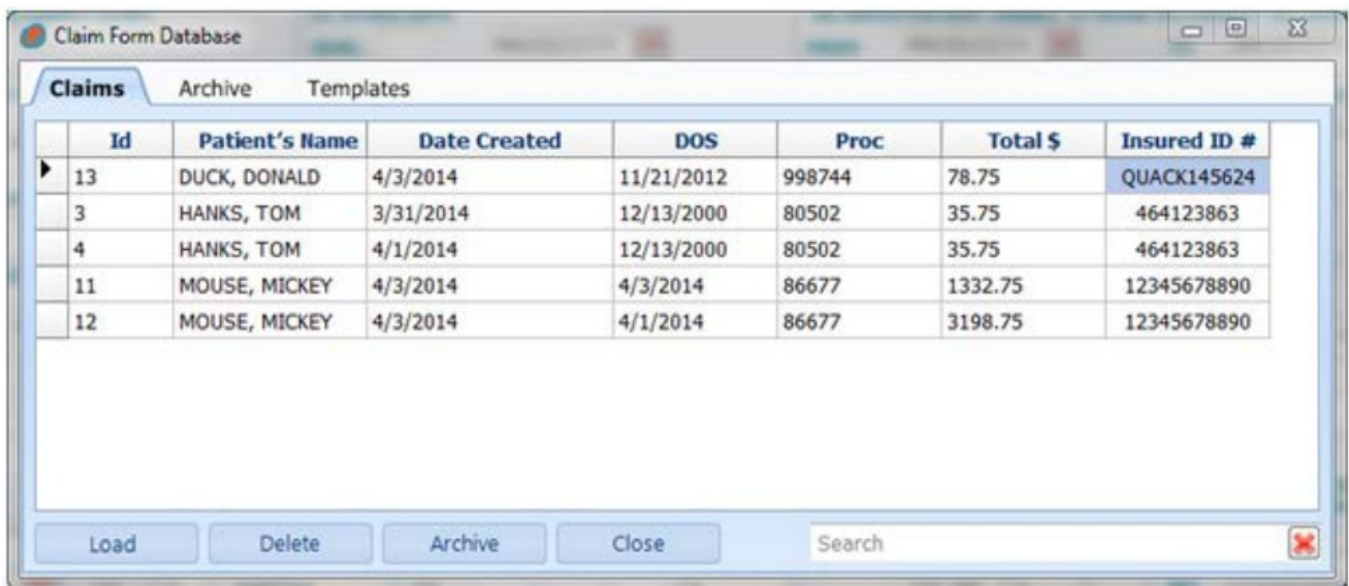
- **Open From File with Prefills**
 - Load claims from a file (e.g. *.npi, *.hcfa1500) with Prefills

- Select multiple claims! (CTRL+Click or SHIFT+Click)
- **Open From File**
 - Load claims from an external file (e.g. *.npi, *.hcfa1500).
 - Select multiple claims! (CTRL+Click or SHIFT+Click)
- **Open From Database**
 - Load claims from the internal Claim Form Database (see below).
- **Save To File (Save As)**

Save claims to an external file (*.hcfa1500), anywhere.
- **Save To Database**

Save claims to the internal Claim Form Database (see below).

Claim Form Database – Open using Data > Open From Database



The screenshot shows a window titled "Claim Form Database" with three tabs: "Claims", "Archive", and "Templates". The "Claims" tab is active, displaying a table with the following data:

	Id	Patient's Name	Date Created	DOS	Proc	Total \$	Insured ID #
▶	13	DUCK, DONALD	4/3/2014	11/21/2012	998744	78.75	QUACK145624
	3	HANKS, TOM	3/31/2014	12/13/2000	80502	35.75	464123863
	4	HANKS, TOM	4/1/2014	12/13/2000	80502	35.75	464123863
	11	MOUSE, MICKEY	4/3/2014	4/3/2014	86677	1332.75	12345678890
	12	MOUSE, MICKEY	4/3/2014	4/1/2014	86677	3198.75	12345678890

At the bottom of the window, there are buttons for "Load", "Delete", "Archive", and "Close", along with a "Search" text box and a close button (X).

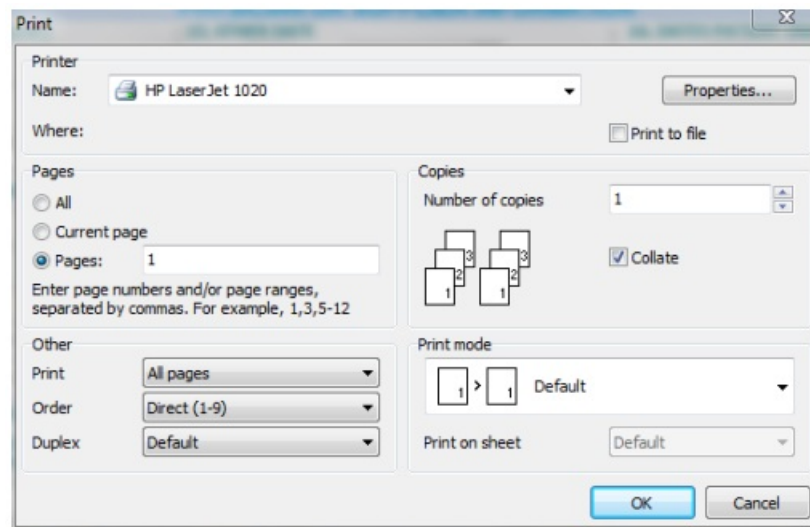
- **Tabs**

Claims: Main storage. Your claims.

 - Archive: Alternate claim storage. Optional.
 - Templates: Template files. Create by leaving Patient Name blank.
- Search bar – Bottom-right corner. Explore in real-time.
- Choose a claim to open and press Load.



- **Print Now!**
 - Always prints the data. Will print the form based Print Mode.
 - Can print Text Only or Text & Form (color, b&w).



- **Batch Print**

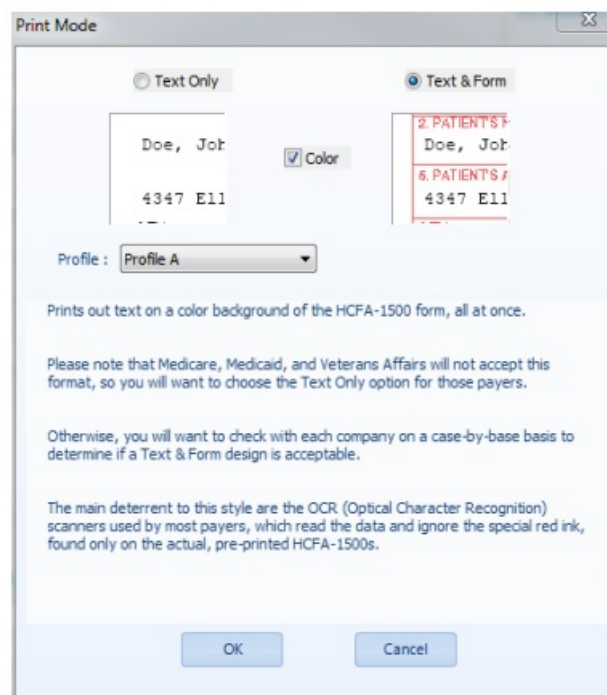
Print multiple pages at one time.

- **Print Mode**

- Choose between Text Only or Text & Form.
- Text & Form prints in color or black & white.

- **Print Font**

Adjust the printed font. Bold option.



- **General Alignment**

- Adjust the print alignment in large chunks.
- Up-Down is vertical movement; Left-Right is horizontal movement.
- Set Profiles for multiple alignment setups.

General Alignment

Profile: **Profile A**

Up-Down

Text In This Quarter Is Moved: Down 0.02 Inches
Text In This Quarter Is Moved: Down 0.04 Inches
Text In This Quarter Is Moved: Down 0.06 Inches
Text In This Quarter Is Moved: Down 0.14 Inches

Left-Right

Text In This Third Is Moved: Right 0.08 Inches	Text In This Third Is Moved: Right 0.10 Inches	Text In This Third Is Moved: Right 0.12 Inches
--	--	--

Return to Defaults
Save Settings

Up-Down (View)
Left-Right (View)

OK Cancel Advanced Alignment

- **Advanced Alignment**

- o Adjust print alignment field-by-field.

Advanced Alignment

Align fields one-by-one

- (1) Select field to adjust.
- (2) Move sliders accordingly.
- (3) Repeat as necessary.

Center
Center

Reset Back to General Alignment

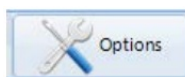
Save

- **Prefills**

Prefills

- o Fill out data to be saved and applied to future claims. Time-saver.
 - o Setup multiple "Profiles" from the dropdown.
 - o Rename by right-clicking.
 - o Save & Apply: Save entry and apply to current form.
 - o Save: Save data entries and any changes in Form Prefills.

- To move/backup all your HCFA claims from the internal HCFA software database, please carefully follow the instructions below:
 - On the HCFA 1500 ToolBar, select OPTIONS>Backup/Restore Database. The screen below will appear.
 - Click CHOOSE FILE and name the file something you will remember. Please note it ends in the suffix XXXXX.zHCFA.
 - Click BACKUP. You have now backed all your claim files up to the drive you just selected.
 - When the HCFA software is reinstalled on the new computer, go to the HCFA 1500 ToolBar, select OPTIONS>Backup/Restore Database.
 - Click CHOOSE FILE and select the backup file you made ending in the suffix XXXXX.zHCFA.
 - Click Restore.
 - You will need to sign out of the HCFA software and log back in.
 - All your old HCFA claim files are now available in the Internal database on the new computer.



- Options
 - User Interface:
 - Capitalize All Entries: Auto-capitalize data entry.
 - AutoCopy data in 24A – J: Copies data vertically (down). AutoFill.
 - Disable AutoAddition in Box 28 (Total Charges).
 - Disable AutoFill from Box 6 (Self):
 - Turns off Patient-to-Insured data copying.
 - Display Text Color: Change the color of the form's text.
 - Load/Save:
 - Overwrite when Load From File:

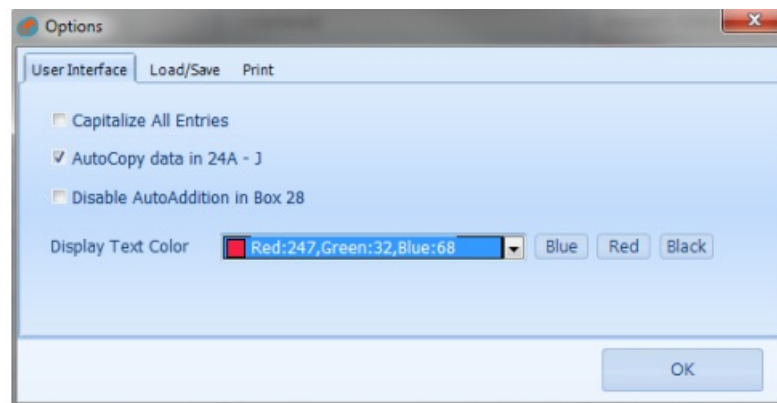
- When loading multiple files at once, overwrite if file exists.
- Save/Load To/From File Toolbar Function:
 - Toggles the Load/Save toolbar icons to:



- Load/Save internally to the database (default).
- Load/Save externally to a file.
- Load File Location: Default “Load From File” location.
- Save File Location: Default “Save To File” location.

• Print:

- Display Print Mode before Print.
- Remove Print Commas (Box 2 & 4): Disables comma output.
- Date Output: Adjust the date print output separation character.
- Date-Year Format: Print years of date fields in CCYY or YY format.
- Apply to Box 3 & 11a: Check to enable



• Claims*

- Create eFile: Generates a *.ehcfa Print Image file.
- Valid 'Print Image' eFile (electronic) output.
 - Can open as *.txt – with Notepad.
 - *Only visible in eDirect edition

Claims Form Database					eFile Queue - # of Claims: 7				
Patient's Name	Date Created	DOS	Proc	Total \$	Patient's Name	Date Created	DOS	Proc	Total \$
DUCK, DONALD	4/3/2014	11/21/2012	998744	78.75	MOUSE, MICKEY	4/3/2014	4/3/2014	86677	1332.75
HANKS, TOM	3/31/2014	12/13/2000	80502	35.75	HANKS, TOM	4/1/2014	12/13/2000	80502	35.75
HANKS, TOM	4/1/2014	12/13/2000	80502	35.75	HANKS, TOM	3/31/2014	12/13/2000	80502	35.75
MOUSE, MICKEY	4/3/2014	4/3/2014	86677	1332.75	DUCK, DONALD	4/3/2014	11/21/2012	998744	78.75
MOUSE, MICKEY	4/3/2014	4/1/2014	86677	3198.75	MOUSE, MICKEY	4/3/2014	4/1/2014	86677	3198.75
SMITH JOHN	4/3/2014			0	SMITH JOHN	4/3/2014			0
SMITH, JOHN	4/3/2014			0	SMITH, JOHN	4/3/2014			0

- How do I create eClaims?

- Click the eClaims button.
- Click the eFile Creator option.
- “Move” the relevant claims—the ones you wish to submit—to the right-hand list using the arrow buttons.
- Click Create eFile.
- Choose a processor. More information [here](#).
- Save the file to an easy-to-reach location (e.g. Desktop).
- Login to your processor & upload only the *.ehcfa file.
- Any other type of file will not work.
- ~
- How-To Demo: UB04software.com/how-to/eClaims



- **Help**

Opens HCFA-1500 Instructions – NUCC Manual.

- **Retrieve Registration**

- Enter one piece of information & click Retrieve Registration.
- Clear Database to remove all internally saved claim data.
- Deactivate to preserve the user license.

- **Check for Update**

Scours the interwebs for a software update.

- **Website**

Opens your favorite website, UB04software.com.

- **About**

- Shows version number, build date, and edition name.
- Always great information to send your Support Agent!



- **Status Bar**

- Current Patient's Name. Double-click to Load Form.
- Status: Opened claim's status. Double-click to Save Form.
 - Status: Saved – Claim successfully saved.
 - Status: Changed! – Claim changed. Save to avoid data loss.
 - Status: Loaded – Claim successfully loaded.
- Progress Bar: Tells you when the program is busy



- **Field Options**

- Help boxes – Hover to display the NUCC standard for that field.
- Dropdown boxes – Click and choose.
- Calendar boxes – Click to view calendar widget.

Common Issues

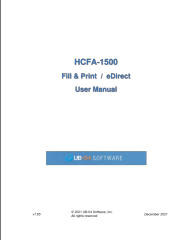
- How do I create eClaims?
 - Click the eClaims button & select eFile Creator.
 - “Move” the relevant claims-to the right-hand list.
 - Click Create eFile. Choose a processor. More information [here](#).
 - Save the file to an easy-to-reach location (e.g. Desktop).
 - Login to your processor & upload only the *.ehcfa file.
 - How-To Demo: UB04software.com/how-to/eClaims
- Where is Importation (Excel/CSV)?
 - Importation (How To):
 - Data > Import From > MS Excel > 02-12 HCFA
To obtain “our format,” view the Template instructions below.
 - You can also import with Prefills:
 - Set these ahead of time by clicking Prefills.
 - Data > Import From > MS Excel with Prefills > 02-12 HCFA
 - Creating an Importation Template:
 - To create a template:
 - Data > Export To > MS Excel > Create Template (button)
 - Using Importation Template:
 - You can enter your data into this Excel spreadsheet, with each row representing a new claim form (to be created).
 - Please note that you do not have to fill out every field in this template.
 - Whatever is left blank will be imported blank.
 - Upon importing the data, you will be prompted for a save location.
 - We recommend creating a new folder, as you can easily create hundreds of claims at one time.
 - After importation, the claim files will be editable in the software
- Why does the form look jumbled and disjointed?
 - Choose the “Smaller – 100%” text magnification in Windows.
 - Walkthrough: Windows.Microsoft.com/en-us/Windows7/Display-Magnification
- How do I change the blue color of form’s text?

Options > Display Color Text. Have fun!
- Where is AutoFill? I loved that feature!

Options > AutoCopy data in 24A – J
- Will this work with [Insurance Company XYZ]?
 - It should, our software is based off of the NUCC standards.
 - They are the folks that make the form.
- Does this work on Mac OS X?
 - Yes, using CrossOver by Codeweavers.
 - It creates a sub-section of folders to run this program.
 - First, go here: Codeweavers.com/UB04software.com
 - Install CrossOver.
 - Install UB04software.com’s product (using the CrossTie).
 - ~
 - How-To Video: YouTube.com/CrossOver-UB04software.com

- ~
- Coupon Codes for 25% off CrossOver: via_HCFA-1500
- Users also report success with Parallels & VMware Fusion.

Documents / Resources

	<p>UB-04 SOFTWARE HCFA-1500 Fill and Print eDirect Software [pdf] User Manual HCFA-1500 Fill and Print eDirect Software, HCFA-1500, Fill and Print eDirect Software, Print eDirect Software, eDirect Software, Software</p>
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References

- [🌐 HCFA-1500 & UB-04 Medical Billing Claim Form Software](#)
- [🌐 Windows help & learning](#)
- [🌐 HCFA-1500 & UB-04 Medical Billing Claim Form Software](#)

Manuals+.