

## NOTES

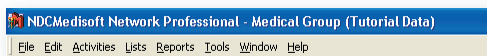
Chapter 2  
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# Starting Medisoft

## Medisoft Tour

Before getting started, let's take a tour of the program interface to help you navigate through, and become familiar with, the different menus and buttons in Medisoft.

### Menu Bar



**Figure 1.1**

Along the top of the Medisoft program there is a standard **Windows Menu Bar**, as seen in *figure 1.1*. Each word represents a drop-down menu that will take you to the different areas of the program. You can access these drop-down lists by clicking on the word or by using the accelerator keys. An underlined letter on the menu bar or in a drop-down list indicates an accelerator key or keyboard shortcut. To use an accelerator key, click the **<ALT>** key and the letter underlined. This will select that option or move the cursor to that field. For example, **<ALT> R** from the main screen will activate the drop-down **Reports Menu**.

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### Speed Bar



**Figure 1.2**

Below the **Menu Bar** in the program is a *Speed Bar*, as seen in *figure 1.2*, designed to give you icons or speed buttons for accessing shortcuts to different areas of the program.



#### **Transaction entry**

(Used to enter charges, payments and adjustments.)



#### **Claim Management**

(The area of the program used to manage the insurance billing.)



#### **Statement Management**

(The area of the program used to manage patient billing.)



#### **Appointment Book**

(This allows you to access the Office Hours portion of the program.)



#### **Patient List**

(Set up and maintain all patient demographic information.)



#### **Insurance Carrier List**

(Set up and maintain all insurance carrier information.)



#### **Procedure Code List**

(Set up and maintain all procedure code information.)



#### **Diagnosis Code List**











(Set up and maintain all diagnosis code information.)



#### **Provider List**

(Set up and maintain all provider information.)

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-  **Referring Provider List**  
(Set up and maintain all referring provider information.)
-  **Address List**  
(Stores attorney, employer, facility, laboratory, miscellaneous, and referral source addresses.)
-  **Patient Recall Entry**  
(Used to set up reminders to recall patients.)
-  **Custom Report List**  
(Used to access the list of all the customer reports created.)
-  **Quick Ledger**  
(Allows you to enter a chart number and access the patient's account activity.)
-  **Quick Balance**  
(Allows you to enter a chart number and access the patient's account activity.)
-  **Enter Payments and Apply Deposits**  
(Quick access to Payment Application.)
-  **Show/Hide Hints**  
(If you place your mouse over an icon, a pop-up hint will appear to explain the item that you have selected. You can choose to disable these pop-up hints.)
-  **Help**  
(You can click on this icon anywhere in the program to access the online **Help** files.)
-  **Exit Program**  
(Clicking on this icon will exit the Medisoft program completely.)

This tool bar can be customized by simply right clicking on the icon and selecting **Customize**.

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### Shortcut Bar



*Figure 1.3*

The **Shortcut Bar** is designed for people who prefer to use the keyboard. In the bottom left hand corner of the active Medisoft window, a **Shortcut Bar** will appear. This bar will update its options depending on the active window. It lists the function key shortcuts available. As seen in *figure 1.3*, if you hit the **F1** key, you will activate the online help. If you hit the **F7** key, you will bring up the Ledger screen. This feature can save you from having to take your hands off the keyboard.

### Medisoft Help

Medisoft has included a smart online manual inside the program. This online manual can be accessed from anywhere in the program by hitting the **F1** key or by clicking on the **Help** icon on the Medisoft Speed Bar. Regardless of which screen is active, when you select the help function it will take you to the part of the manual that relates to the current function. For example, if you are in the Transaction Entry screen and hit F1, the online manual will pop up displaying the transaction entry portion.

### Medisoft File Menu

#### **Open Practice / New Practice**

Medisoft will allow you to maintain multiple sets of data using just one Medisoft program. Under the **File Menu** you can select **New Practice** to add a new data set or **Open Practice** to use an existing set of data. To change the data set you are working with, under the **File Menu**, select **Open Practice**. A pop-up window will show you the data sets Medisoft currently is managing. Simply click on the name of the data set and