Medical Software / Insurance / Pre-authorization Exam Content Outline
According to Industry Standard Needs Study

Medical Software : Exam Content Outline	**Check**
Content Section: A	
Setting up the Practice	
Billing Services	
Setting up Multiple Practices	
Practice Type	
Content Section: B	
Medisoft at a Glance	
Menu Bar	
File Menu	
Edit Menu	
Activities Menu	
Lists Menu	
Reports Menu	
Tools Menu	
Window Menu	
Services Menu	
Help Menu	
Toolbar	
Shortcut Bar	
Keystrokes and Shortcuts	
Content Section: C	
General Practice Setup	
Open Practice, New Practice	
Backup Data, View Backups, Restore Backups	
Program Date	
Program Options	
General Tab	
Data Entry Tab	
Payment Application Tab (Advanced and above)	
Aging Reports Tab	
HIPAA Tab	
Color-Coding Tab (Advanced and above)	
Billing Tab (Advanced and above)	
Audit Tab	
Security Setup	
Medisoft Standard Security	
Global Login	
Login/Password Management	
Permissions (Advanced and above)	

File Maintenance	
Rebuild Indexes	
Pack Data	
Purge Data	
Recalculate Balances	
Tutorial Practice	
User Setup	
Group Setup	
Permissions	
Login/Password Management	
Content Section: D	
Setting Up the Practice	
Procedure, Payment, and Adjustment Codes	
New Procedure Codes and Accounting Codes	
General Tab	
Amounts Tab	
Allowed Amounts Tab (Advanced and above)	
MultiLink Codes	
Diagnosis Codes	
Provider Records	
Address Tab	
Default Pins and Default Group IDs Tabs	
PINs Tab	
Eligibility Tab	
Provider Class Records	
Insurance Carrier Records	
Address Tab	
Options Tab	
EDI/Eligibility Tab	
Codes Tab	
Allowed Tab (Advanced and above)	
PINs Tab	
Insurance Class Records	
Address Records	
EDI Receiver Records	
Referring Provider Records	
Address Tab	
Default PINs Tab	
PINs Tab	
Billing Code List	
Contact List (Advanced and above)	
Default Printer Selection (Advanced and above)	
Tutorial Practice	
Opening the Practice Record	
Creating a New Procedure Code	
Editing Procedure Codes	
Creating a MultiLink Code	

Creating a New Diagnosis Code	
Setting up a New Provider Record	
Setting Up a New Insurance Carrier Record	
Creating a New Address Record	
Setting Up a Referring Provider Record	
Content Section: E	
Patient Record Setup	
Patient List	
Set Up	
Setting Up the Chart Number	
New Patient Setup Window	
Patient Quick Entry Overview	
Custom Patient Designer (Advanced and above)	
Setting up a Case	
Custom Case Designer (Network Professional only)	
Tutorial Practice	
Entering Patient and Case Records	
Setting Up a New Patient Record	
Opening a New Case	
Content Section: F	
Transaction Entry	
Start with a Chart Number	
Entering a Charge in Transaction Entry	
Entering a Payment or Adjustment in Transaction Entry	
Apply Payments or Adjustments to Charges	
Unprocessed Transactions	
Communications Manager Overview	
Patient Treatment Plans (Network Professional only)	
Print Receipts, Create Claims	
Billing Charges (Advanced and above)	
Quick Ledger (Advanced and above)	
Quick Balance (Advanced and above)	
Tutorial Practice	
Transaction Entry	
Transaction Documentation	
Content Section: G	
Claim Management	
The Claim Manager's Job	
The Claim Management Window	
Header	
Grid	
Buttons	
Creating Claims	
Editing Claims	
Printing Claims	

Troubleshooting Insurance Claims	
Reprinting Claims	
Listing Claims	
Changing Claim Status	
Entire Batch	
Selecting Multiple Claims	
Sending Claims to a File	
Tutorial Practice	
Claim Management	
Creating Claims	
Editing Claims	
Sending Claims	
Changing Claim Status	
Content Section: H	
Statement Management (Advanced and above)	
Statement Management Window	
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Grid	
Buttons	
Creating Statements	
Editing Statements	
Converting Statements	
Printing Statements	
Reprinting Statements	
Listing Statements	
Changing Statement Status	
Entire Batch	
Selecting Multiple Statements	
Tutorial Practice	
Statement Management	
Creating Statements	
Editing Statements	
Sending Statements	
Troubleshooting Statement Printing	
Patient Remainder Statements (Advanced and above)	
Changing Statement Status	
Content Section: I	
Deposit/Payment Application (Medisoft Advanced and above)	
EOB Payments	
Managed Care	
Capitation Payment	
Tutorial Practice	
Creating a New Deposit	

Content Section: J	
Collections and Revenue Management	
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Add Collection List Items	
Patient Payment Plans	
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Customizing Collection Letters	
Revenue	
Billing Cycles	
Claim Rejection Messages	
Small Balance Write-off	
Writing off a Balance	
Tutorial Practice	
Creating Collection List Items	
Adding a Collection List Item	
Patient Payment Plans	
Collection Letters	
Customizing Collection Letters	
Writing off Small-Balances	
Content Section: K	
Electronic Services	
Electronic Claims Processing	
Customizing Statements	
Eligibility Verification	
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Reports Overview	
Setting up a Reports User	
Report Procedures	
Printing a Report	
Viewing a Repot	
Searching for a Specific Detail in a Report	
Exporting a Report	
Available Reports	
Day Sheets	
Analysis Reports	
Aging Reports	
Production Reports	
Activity Reports	
Collection Reports	
Audit Reports	
Patient Ledger	
Guarantor Quick Balance List	
Standard Patient Lists	
Custom Report List	

Other Report Functions	
Load Saved Reports	
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Medisoft Report Designer	
Report Designer	
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Toolbar	
The Format Grid	
Report Properties	
Field Properties	
Standard Properties	
Text Field Properties	
Data Field Properties	
Calculated Field Properties	
System Data Field Properties	
Shape Field Properties	
Images Field Properties	
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Repositioning the CMS-1500 form	
How To Revise an Existing Report	
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Office Hours	
Introduction	
Starting Office Hours	
Accessing Office Hours from Other Programs	
Office Hours Setup	
Setting up Provider Records	
Setting up Patient Records	
Setting up Case Records	
Setting up Resource Records	
Setting an Appointment	
Repeating Appointments	
Entering Breaks	
Setting Up Repeating Breaks	
Moving/Deleting Appointments	
Changing Appointment Status	
(Office Hours Professional)	
Moving an Appointment	
Deleting an Appointment	
Patient Recall (Office Hours)	
Multiple Booking Columns	
Program Options	

Appointment Length	
Views (Office Hours)	
Appointment Display (Office Hours)	
Security Setup	
Reports in Office Hours	
Appointment List	
Appointment Status (Advanced and above)	
Printing Superbills	
Tutorial Practice	
Entering Resources	
Entering Appointments	
Repeating Appointments	
Setting Breaks	
Creating Reason Codes	
Creating Templates (Office Hours)	
Creating Multi Views (Office Hours)	
Using the Wait List (Office Hours)	
Content Section: O	
Work Administrator	
Introduction	
Assignment List	
Filters	
Tasks	
Rules	
Insurance: Exam Content Outline	**Check**
Commercial Insurance	
Blue Cross Blue	
Medicare	
Medicaid	
TRICARE	
Workers' Compensation	
Pre-Authorization: Exam Content Outline	**Check**
Process	
Request	
Forms	