

# PocketMed PocketBilling 4.0 Documentation (PPC)

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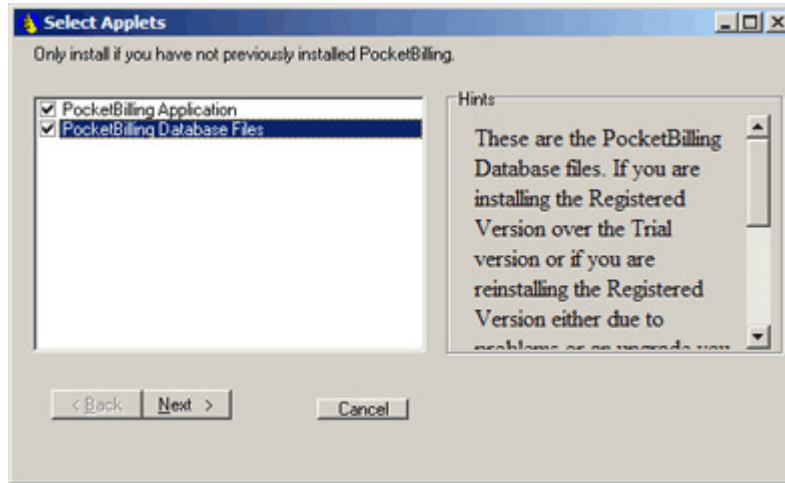
## 1.0 Install PocketBilling 4.0

1. Double click on the Installer EXE



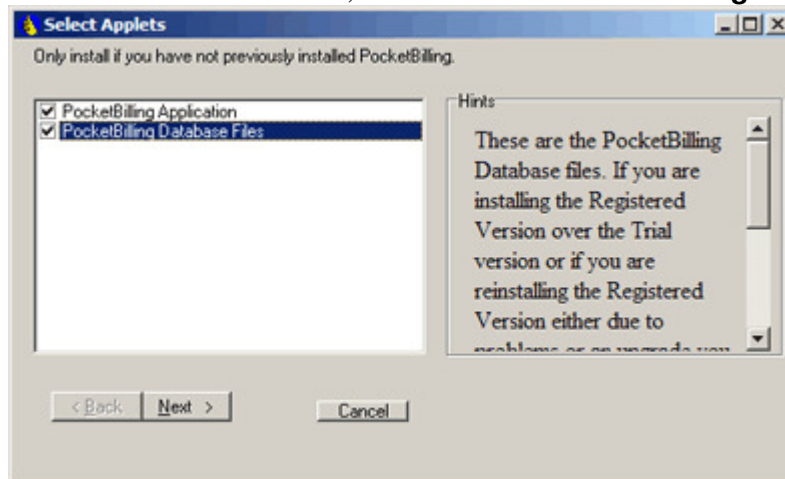
2. PALM USERS ONLY -- On the **Select Applets** screen:
  - o **1.1 Trial version**

If this is a new installation, select to install (default) **PocketBilling Database files**



- **1.2 Full version**

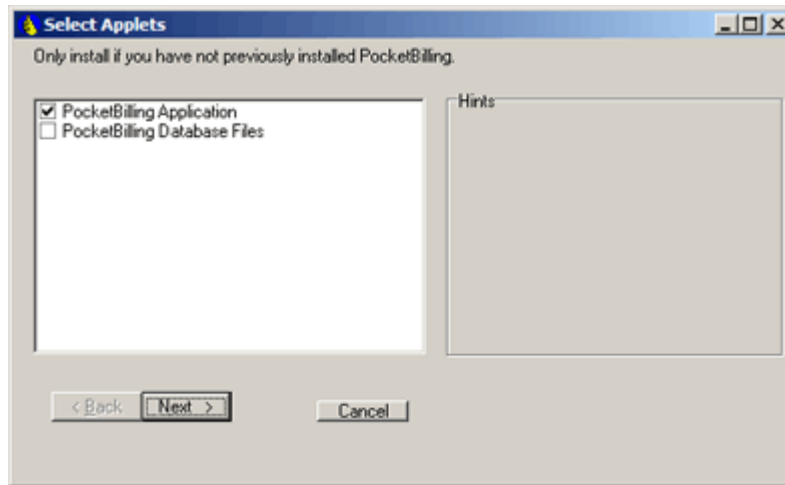
If this is a new installation, select to install **PocketBilling Database files**



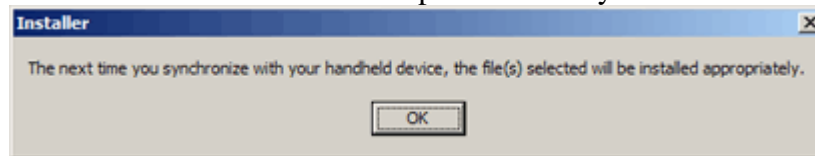
- **1.3 Upgrading from trial to full version**

If upgrading from a trial version of PocketBilling 4.0, **do not** select to install **PocketBilling Database files**. PocketBilling 4.0 no longer uses an unlock code to upgrade from the trial version to the full version, but the

installer itself.



3. You will then see this message indicating that the program and, if selected, database files will be installed upon the next synchronization

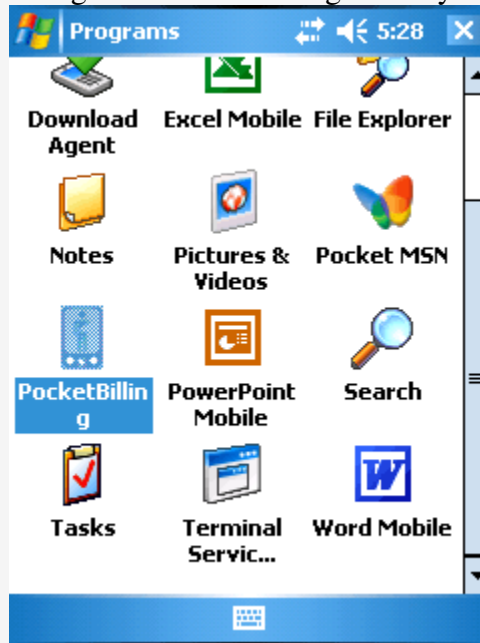


## 1.4 Upgrading from PocketBilling 3

1. Follow the instructions above for general installation.
2. After installation, use from **PocketBilling Desktop** select **File > Import PocketBilling 3.0 Data**
3. Select the handheld user to import

## 1.5 Open PocketBilling 4.0

1. Navigate to PocketBilling 4.0 on your handheld device



2. Select PocketBilling 4.0

## 2.0 Patient Database

- **2.1 Adding/modifying a patient in the database**
  1. Select **Patients** from the **Go-to** menu (if not already selected).
  2. Select the **New icon** from the **Patients** screen.
  3. Enter the **Patient Information** into this form.
  4. After entering/modifying the patient information, select **OK** to save the patient.

## 2.2 Adding insurance information

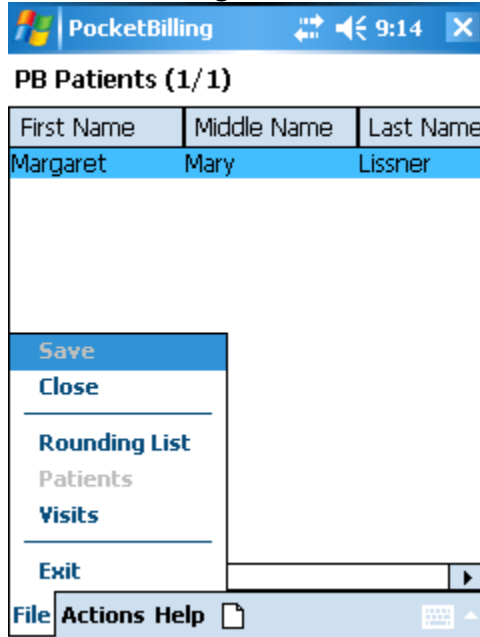
1. Select **Patients** from the **Go-to** menu (if not already selected).
2. Find the patient to edit.
3. Use the **Next -->** button on the main **Patient Information** form until you see the **Insurance** button (3rd screen).
4. Select the **New icon** from the **Insurance** list.
5. Enter the **Insurance information** into this form.
6. After entering/modifying the insurance information, select **OK** to save the insurance record for the patient.

7. Finally, select the **Back arrow** to return to the patient information form.

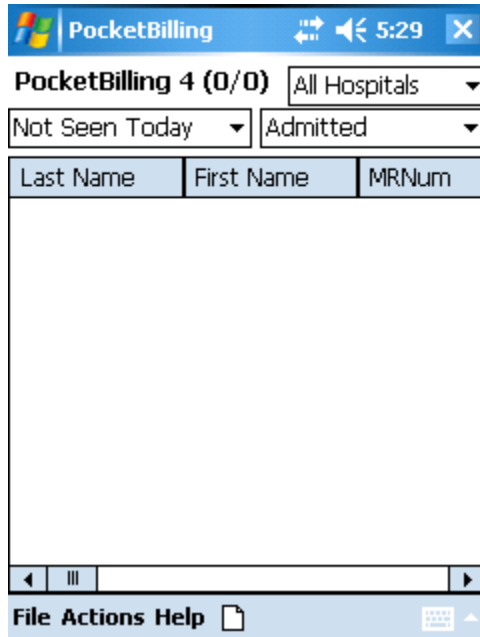
## 3.0 Rounding Database

- **3.1 Adding a rounding patient**

1. Select **Rounding List** from the **Go-to** menu (if not already selected).



2. Select the **New icon** from the **Rounding List** screen.



- **3.1.1 ...from the patient database**

Use the **[Select Patient From List]** button to select the previously entered patient. This will copy the patient's information into the form.

- **3.1.2 ...without patient database link**

Enter the **Rounding Information** into this form.

The image displays two screenshots of a mobile application interface for 'PocketBilling'. The top screenshot shows the 'Patient Information' section with the following fields: 'First Name' (empty), 'Last Name' (empty), and 'Med Rec#' (empty). Below these is a 'Last Rounded' section with 'NO DATE'. At the bottom of the form are buttons for 'Diagnosis', 'Meds', and 'Notes', and a row of smaller buttons: 'Info', 'Admission', 'Visits', and 'Adv'. The bottom screenshot shows the same form but with the fields populated: 'First Name' is 'John', 'Last Name' is 'Donahue', and 'Med Rec#' is '123456'. A grey arrow points from the top screenshot to the bottom one, indicating the transition from an empty form to one with data.

3. Initial diagnosis data may be entered here.

The screenshot shows a mobile application interface with a blue header bar containing the text "PocketBilling", a signal strength icon, a speaker icon, the time "2:35", and an "ok" button. Below the header, the screen displays a form with the following elements:

- A blue button labeled "Patient Initial Diagnosis".
- A red button labeled "[Select Initial Diagnosis]".
- An orange button labeled "Diagnosis Code".
- A white text input field.
- A grey button labeled "Diagnosis Description".
- A white text input field.
- A grey "Back" button in the bottom right corner.

At the bottom of the screen, there is a light blue bar with the text "Record Edit Go To" and a keyboard icon.

4. Use **Select Initial Diagnosis** to open the ICD-9 diagnosis database. Select the diagnosis to enter it into the form.

PB Diagnoses (1468/

Description	Code
Abdominal pain, epigastric	789.06
Abdominal pain, LLQ	789.04
Abdominal pain, RLQ	789.03
Abdominal pain, RUQ	789.01
Abdominal pain, unspec.	789.00
Abdominal/pelvic mass, LLQ	789.34
Abdominal/pelvic mass, RLQ	789.33
Abdominal/pelvic mass, unspec.	789.30
Abnormal blood chemistry, other	790.6
Abnormal coagulation profile	790.92
Abnormal electrocardiogram	794.31
Abnormal fasting glucose	790.21
Abnormal glucose tolerance test	790.22
Abnormal glucose, other	790.29

**Patient Initial Diagnosis**

[Select Initial Diagnosis]

**Diagnosis Code**

719.46

**Diagnosis Description**

Pain, knee

**Back**

- From the **Admission** tab, you can select the appropriate hospital for the patient, as well as the admittance and discharge dates.

PocketBilling 5:43 ok

**Admission Information**

Admit Date 2/3/07

Discharge Date NO DATE

Hospital

Hospital1

Room Number

Info Admission Visits Adv

Record Edit Go To

- Finally, select **OK** to save the patient.

PocketBilling 9:17 X

PocketBilling 4\* (1/2 All Hospitals

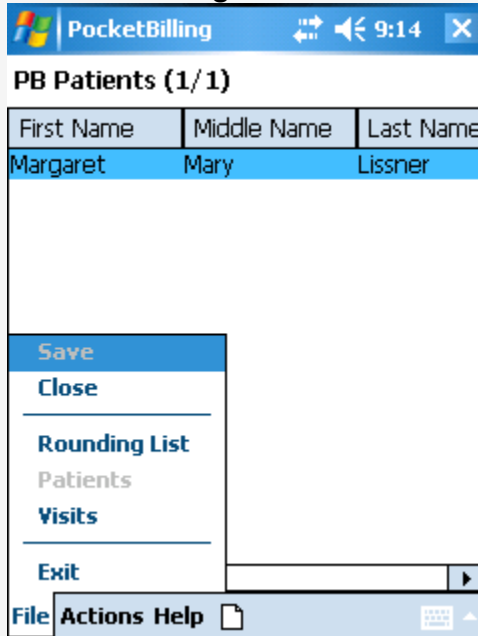
Rounded Any Date Admitted

Last Name	First Name	MRNum
Donahue	John	123456

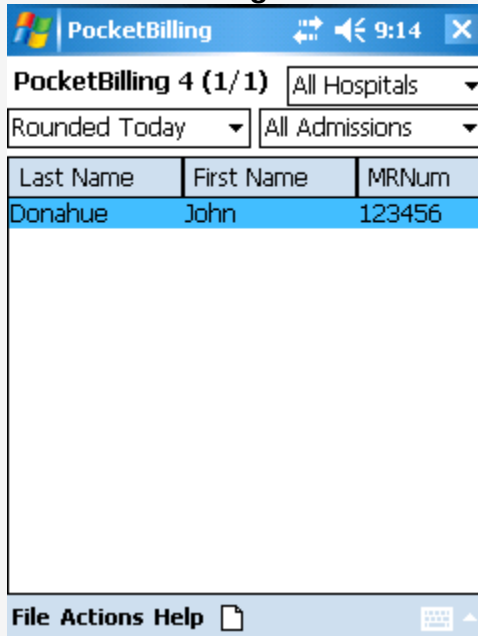
File Actions Help

## 3.2 Using the available Rounding filters

1. Select **Rounding List** from the **Go-to** menu (if not already selected).



2. From the **Rounding List** screen.



- **3.2.1 Hospital selector**

Filters rounding patients by **Hospital**.

- **3.2.2 Rounded date**

Filters rounding patients by **Last Round date**: Not Seen Today, Rounded Today, Rounded Any Date

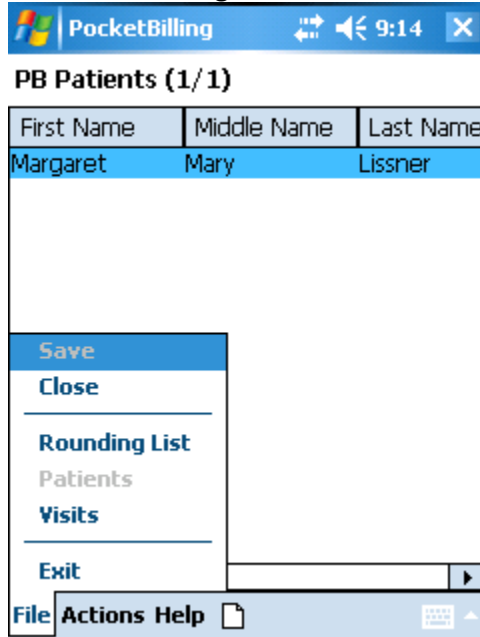
- **3.2.3 Admission status**

Filters rounding patients by **Admission** status: Admitted, Discharged, All

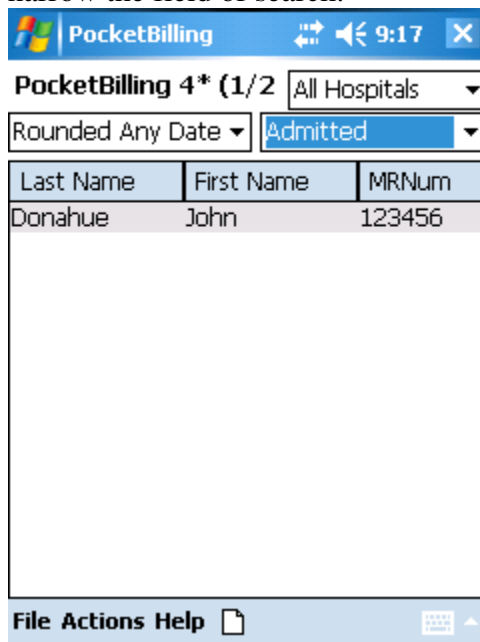
## 4.0 Visits Database

- **4.1 Adding a new charge/visit**

1. Select **Rounding List** from the **Go-to menu** (if not already selected).



2. Select the patient to add a **Charge**. Be sure to check the **View selectors** to narrow the field of search.



3. Select **Visits** from the patient record form.

PocketBilling 5:32 ok

**Patient Information**

[Select Patient From List]

First Name John

Last Name Donahue

Med Rec# 123456 #

**Last Rounded**

NO DATE

Diagnosis Meds Notes

Info Admission Visits Adv

Record Edit Go To X

4. To add a new charge, select the **New icon**

PocketBilling 5:45 X

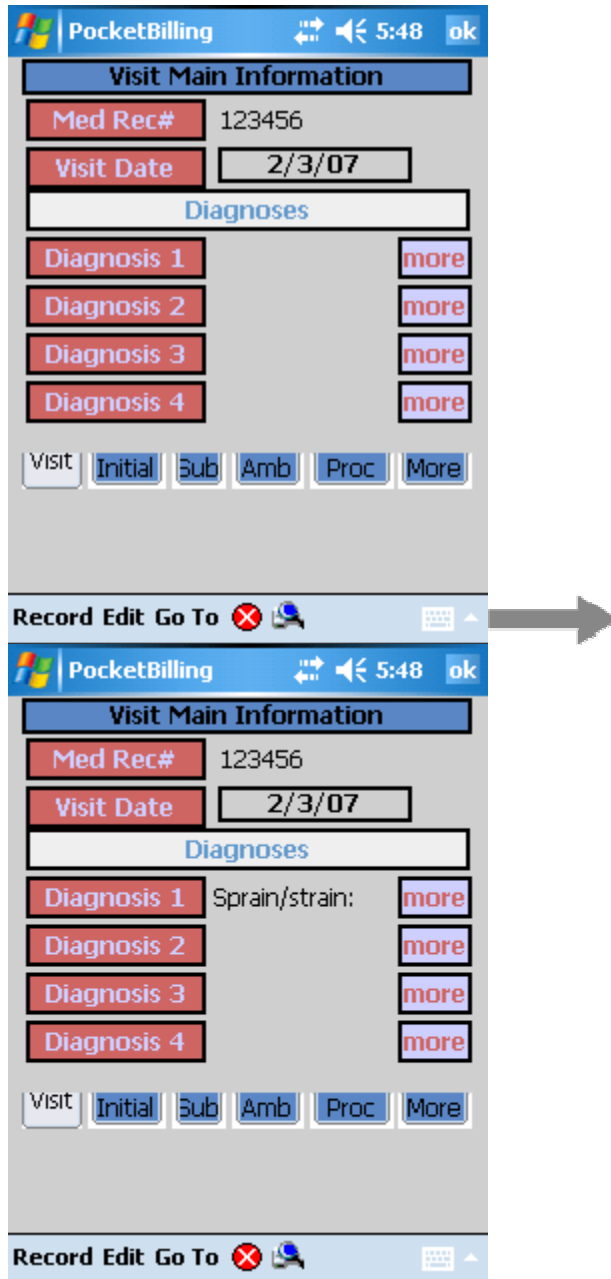
**PB Visits (0/0)**

Visits w/o Charges

MRNum	Visit Date	Initial Chg
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File Actions Help

5. The **Visit Main Information** allows you to add new diagnosis to the patients record, which are retained charge to charge. Use the **Dx labels** to select the diagnosis.



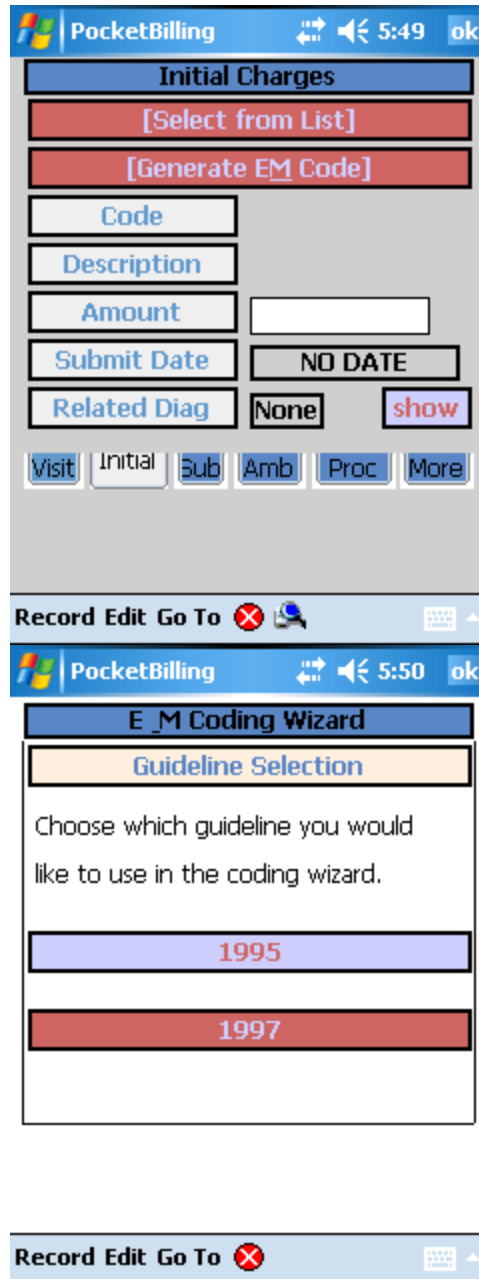
6. To enter a charge, select either the **Initial**, **Sub (Subsequent)**, **Amb (Ambulatory)**, **Proc (Procedure)**, or **More (ER/Nursing)** tab.

7. There are three ways to enter a charge:

The screenshot shows the PocketBilling application interface. At the top, there is a status bar with the text "PocketBilling", a signal strength icon, a battery icon, the time "5:49", and an "ok" button. Below the status bar is a blue header bar with the text "Initial Charges". Underneath the header bar are two red buttons: "[Select from List]" and "[Generate EM Code]". Below these buttons are several input fields and buttons: "Code" (a text input field), "Description" (a text input field), "Amount" (a text input field), "Submit Date" (a text input field containing "NO DATE"), and "Related Diag" (a text input field containing "None" and a "show" button). At the bottom of the form are several buttons: "Visit", "Initial", "Sub", "Amb", "Proc", and "More". At the very bottom of the screen is a navigation bar with the text "Record Edit Go To" and several icons: a red 'X', a magnifying glass, and a keyboard icon.

#### 1. 4.1.1 Using the E&M generator

Use the **[Generate E&M Code]** option to let PocketBilling choose the appropriate charge code based on a series of standard questions.



## 2. 4.1.2 Selecting from E&M code list

Use the **[Select from List]** option to manually select a charge.

PocketBilling 5:49 ok

**Initial Charges**

[Select from List]

[Generate EM Code]

Code

Description

Amount

Submit Date NO DATE

Related Diag None show

Visit Initial Sub Amb Proc More

Record Edit Go To

PocketBilling 5:50

**PB Initial (15/15)**

Code	Description	C
99221	Initial-Low	
99222	Initial-Mod	
99223	Initial-High	
99218	Observation-Low	
99219	Observation-Mod	
99220	Observation-High	
99217	Observation-Discharge	
99251	Initial Consult-Focused	
99252	Initial Consult-Focused	
99253	Initial Consult-Detailed	
99254	Initial Consult-Comp/Mi	
99255	Initial Consult-Comp/Hi	
99291	Critical Care-30-74 min:	
99292	Critical Care-Each Add'l	

File Actions Help

### 3. 4.1.3 Time based coding

Use the **[Time Based Coding]** option to use this method of charging.

8. All options will enter the data for the patient.

PocketBilling 5:50 ok

**Initial Charges**

[Select from List]

[Generate EM Code]

Code: 99221

Description: Initial-Low

Amount: [ ]

Submit Date: NO DATE

Related Diag: None [show]

Visit Initial Sub Amb Proc More

Record Edit Go To [X] [ ] [ ]

9. Next, select **OK** to save the charge. (You may need to adjust the **View selectors**).

PocketBilling 5:53 X

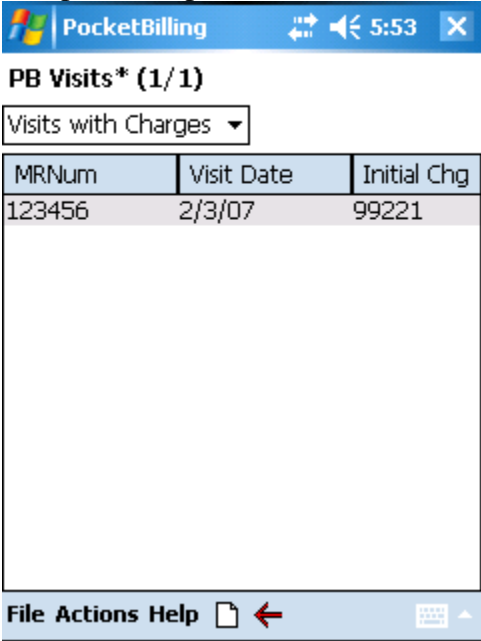
**PB Visits\* (1/1)**

Visits with Charges ▾

MRNum	Visit Date	Initial Chg
123456	2/3/07	99221

File Actions Help [ ] [ ] [ ]

10. To update the patient's **Last Rounded** date, select the **Back arrow**



The screenshot shows a software window titled "PocketBilling" with a system tray showing the time as 5:53. Below the title bar, the text "PB Visits\* (1/1)" is displayed. A dropdown menu is set to "Visits with Charges". A table with three columns is shown: "MRNum", "Visit Date", and "Initial Chg". The table contains one row of data: MRNum 123456, Visit Date 2/3/07, and Initial Chg 99221. At the bottom of the window, there is a menu bar with "File", "Actions", and "Help", and a red back arrow icon.

MRNum	Visit Date	Initial Chg
123456	2/3/07	99221

11. Then, select **Today** from the **Last Rounded** drop-down menu.

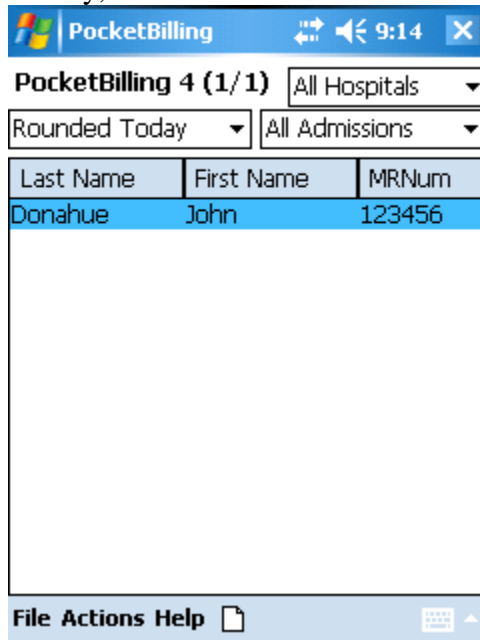
The screenshot shows the PocketBilling app interface. At the top, the status bar displays 'PocketBilling', signal strength, a speaker icon, the time '5:53', and an 'ok' button. Below this is a blue header 'Patient Information' and a red button '[Select Patient From List]'. Three input fields are visible: 'First Name' with 'John', 'Last Name' with 'Donahue', and 'Med Rec#' with '123456' and a '#' icon. A dropdown menu is open over the 'Last Rounded' field, showing options: 'Today' (highlighted in blue), 'Tomorrow', 'One Week', 'No Date', and 'Choose Date'. Below the dropdown are buttons for 'Meds' and 'Notes'. At the bottom of the form are buttons for 'Intro', 'Admission', 'Visits', and 'Adv'.

Record Edit Go To

The screenshot shows the same PocketBilling app interface, but the 'Last Rounded' dropdown menu is closed. The 'Last Rounded' field now displays the date '2/3/07'. The rest of the interface, including the patient information fields and buttons, remains the same as in the previous screenshot.

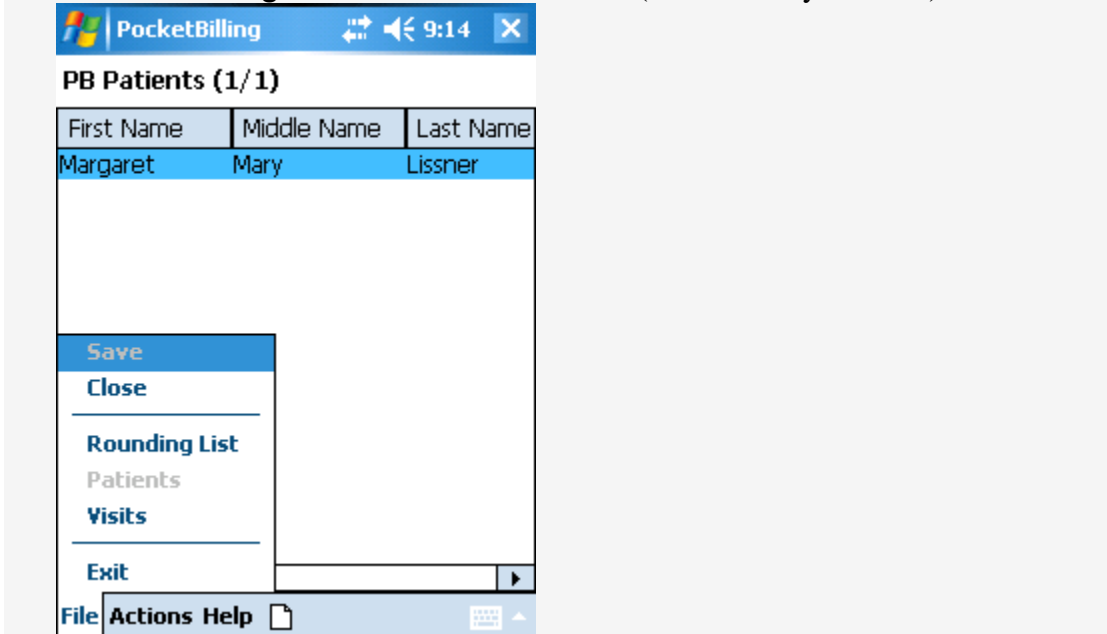
Record Edit Go To

12. Finally, select **OK** to save new rounding data.



## 4.2 Using the available Visit Database filters

1. Select **Rounding List** from the **Go-to menu** (if not already selected).



2. Select the patient to add a **Charge**. Be sure to check the **View selectors** to narrow the field of search.

The screenshot shows the PocketBilling application window. The title bar reads "PocketBilling" with a search icon, a volume icon, and the time "9:17". Below the title bar, there is a search filter "PocketBilling 4\* (1/2)" and a dropdown menu set to "All Hospitals". Below that, there are two more dropdown menus: "Rounded Any Date" and "Admitted". The main area contains a table with the following data:

Last Name	First Name	MRNum
Donahue	John	123456

At the bottom of the window, there is a menu bar with "File", "Actions", and "Help".

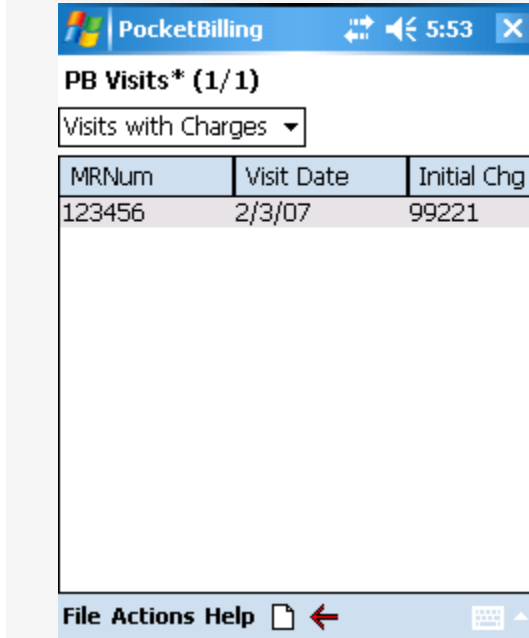
3. Select **Visits** from the patient record form.

The screenshot shows the PocketBilling application window displaying a patient record form. The title bar reads "PocketBilling" with a search icon, a volume icon, and the time "5:32" and "ok". The form is titled "Patient Information" and contains the following fields:

- [Select Patient From List]
- First Name: John
- Last Name: Donahue
- Med Rec#: 123456

Below these fields, there is a section titled "Last Rounded" with the text "NO DATE". At the bottom of the form, there are three buttons: "Diagnosis", "Meds", and "Notes". Below these buttons, there are four tabs: "Info", "Admission", "Visits", and "Adv". The "Visits" tab is currently selected. At the bottom of the window, there is a menu bar with "Record", "Edit", "Go To", and a search icon.

4. From the **Visits** screen.



- o **4.2.1 Visits with/without charges**

Filters visits by those with and without a **Charge** or all visits.

## 5.0 Misc.

- PocketBilling 4 provides many additional features to help further your handheld charge capturing experience.

## 5.1 Using the Print feature

- **5.1.1 Printing with PocketBilling Desktop**
  1. Select the database to print (**Rounding List, Visits, Patients**) from the **Go-to menu** (if not already selected).
  2. Choose **File > Print** to open up the formatting menu to select the desired printer output format:
    - **Record View Format:** Prints each patient's record in turn, separated by a dashed line. Each field is printed on a separate line.
    - **List View Format:** Prints each patient's record in turn, in an easily read and space-saving spreadsheet format.
  3. The standard Windows Print dialog window will be displayed. Proceed as usual.
  4. LIST VIEW FORMAT ONLY: A Print Settings dialog will be displayed where you can customize the layout of the printed pages. Making the

following suggested adjustments will produce an easily readable report for your coding and billing staff.

- On the General tabbed page, select Single as the border and Solid as the border style to print grid lines defining the columns and rows on the spreadsheet.
- Select Always from the Fit to Page drop-down list for most efficient layout.
- Likewise, to fit the most patients on each page, go to the Margins tabbed page and choose Landscape as the page orientation.

5. **Tip:** In both formats, patient records are printed in the order in which they are displayed on the screen. Sort the patient list as desired, before printing.

6. **Tip:** To include only a selected group of patient records, before printing use a filter to select the patients to be displayed and printed. Patients can be filtered based on name, admission or last round date, MR#, hospital, or any other patient data field.

#### • 5.1.2 Printing over IR

1. PocketBilling records can be printed from the handheld computer as well using external 3rd party printing agents.

2. PocketMed recommends the following applications:

▪ For Palm OS:

- PrintBoy (Bachmann Software)
- IrPrint (IS Complete)
- PalmPrint (Stevens Creek...)

▪ For Pocket PC:

- PrintBoy (Bachmann Software)
- PrintPocketCE (Field Software)

## 5.2 Using the Print Report feature

1. Select the database to print (**Rounding List, Visits, Patients**) from the **Go-to menu** (if not already selected).

2. Choose **File > Print Records** to open up the formatting menu to select the desired printer output format:
  - **Detailed Patient Record:** Report contains all of the demographic and history information for each patient along with their visits.
  - **All Patient Visits:** Report contains all of the visits for each patient.
3. PocketBilling Desktop then displays a print preview for how the reports will look. Select [**Print**] to print the report or [**Back**] to modify a previous selection.

## 5.3 Exporting

- **5.3.1 Exporting from PocketBilling Desktop**
  1. Select the database to export (**Rounding List, Visits, Patients**) from the **Go-to menu** (if not already selected).
  2. Choose **File > Export** to open up the formatting menu to select the desired export file and formatting options:
    - **File Information/Output File:** File to export to. Use **Browse** button to change destination.
    - **Plase Quotes around each Field:** Places quotes around all fields. Useful when importing data later.
    - **Create First Line with Field Names:** First line of export contains the field names for each column. Useful when exporting for later processing/import.
    - **Only Export Records Within Filter Range:** When checked only exports those records that are visible on screen. When unchecked, exports all records in database.
    - **Export HanDBase Unique Record Identifier Field (rowhrid\_):** Exports internal database field identifiers that aid processing and future import.
    - **Export Using:**
      - **Field Order of fields:** Exports columns in onscreen visible order.
      - **Physical Order of fields:** Exports columns in backend physical order layout.
  3. Finally, use the [**Export Database**] button to create file.
- **5.3.2 Exporting from PocketBilling for Palm**
  1. Select the database to export (**Rounding List, Visits, Patients**) from the **Go-to menu** (if not already selected).
  2. From the top menu choose **Actions > Export Records** or **Shortcut /E** to export the records to the Memos application.
  3. The exported records are now available from the Palm or Desktop (using Palm Desktop) with the Memos application.

## 5.4 E-mail

1. Export the records to e-mail.
2. On the Desktop use any e-mail application to attach the exported record to a composed e-mail
3. If your Palm supports e-mail send/receive you may also be able to attach the exported records from the Memos application to a new e-mail

## 5.5 Customizations

- **5.5.1 Adding/modifying ICD-9/E&M codes**

1. To **add** an item: When at the database, select the **New icon** to add a record not presently available.
2. Enter the required information and click the [**Save**] button.
3. From within PocketBilling Desktop, modify the list, as needed.
  - To **rename** an item in the list: Select the item to open the editor. Modify the information and click Save.
  - To **delete** an item: Select the item and click Record > Delete.
4. To **sort** the list of entries: Click the Field header and select **Sort Forward/Reverse**.
5. Make your selection, or choose **Go-to > Back** or **File > Save** to committ changes.

- **5.5.2 Editing popup fields**

1. Access the popup list for the field by clicking the down arrow beside the field name, as usual
2. Select Edit Popup List.
3. Modify the list, as needed.
  - To **add** a new entry: Click New, type in the new entry, and click OK.
  - To **rename** an item in the list: Select the item and click Rename. Enter the new name and click OK.
  - To **delete** an item: Select the item and click Delete.
  - To **sort** the list of entries: Check the Sort Popups check box.
4. Click OK to save your changes and return to the previous screen.
5. **Note:** The popup choices available when editing a given field can be customized. (This feature does not apply to date fields.) The list of choices is currently limited to 60 items, up to 80 characters each.