

# PocketMed PocketBilling 4.0 Documentation (Palm)

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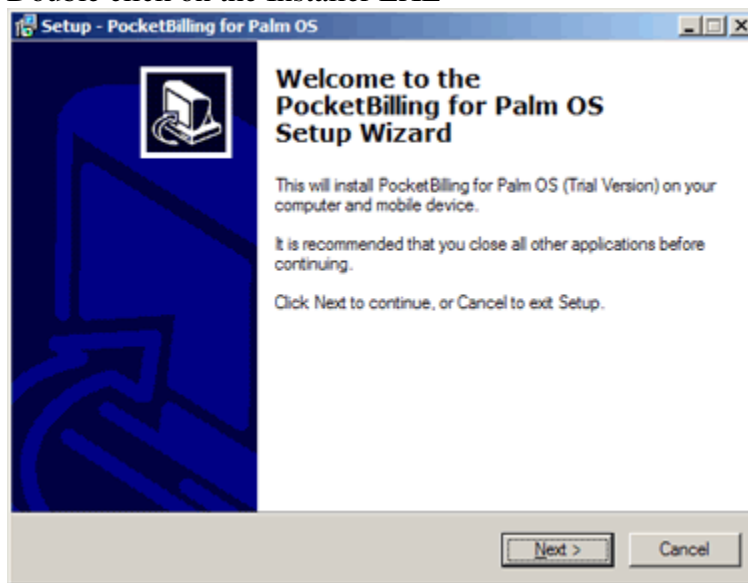
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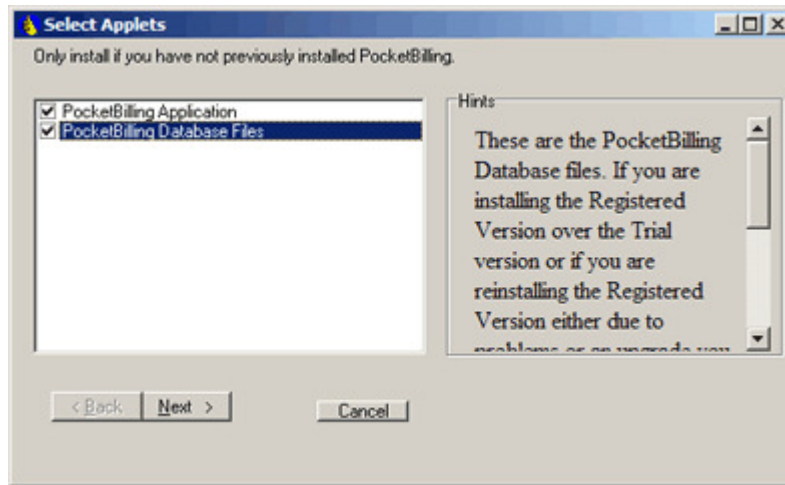
## 1.0 Install PocketBilling 4.0

1. Double click on the Installer EXE



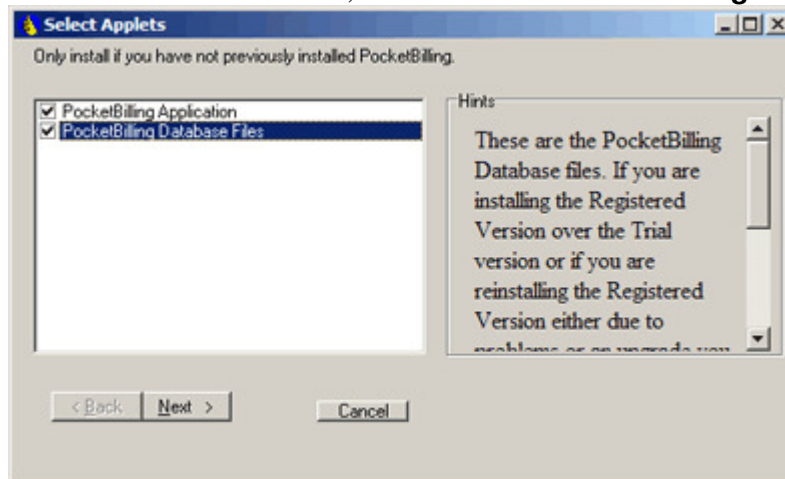
2. PALM USERS ONLY -- On the **Select Applets** screen:
  - o **1.1 Trial version**

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



- **1.2 Full version**

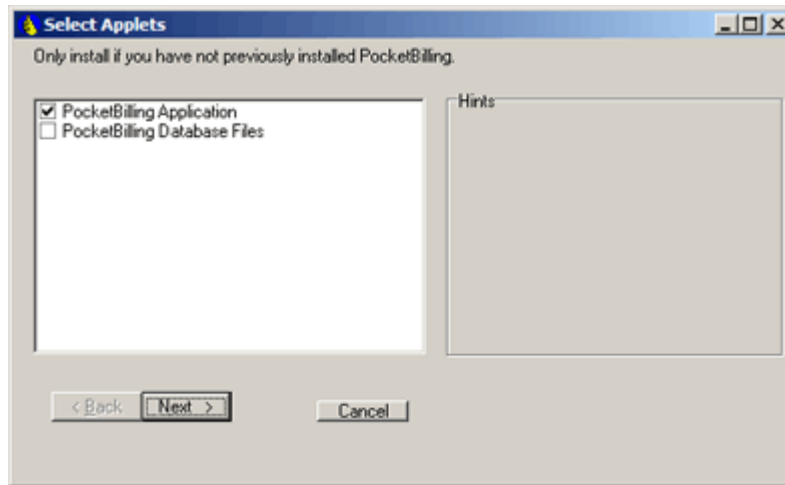
If this is a new installation, select to install **PocketBilling Database files**



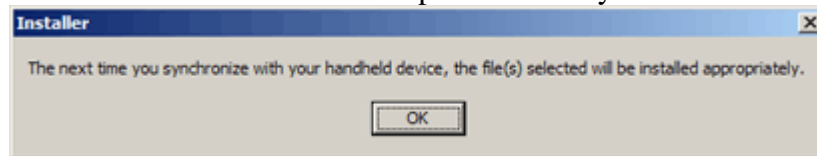
- **1.3 Upgrading from trial to full version**

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

9:31 pm  ▼ PocketMed



PocketBill...

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 button** from the **Patients** screen.
  3. Enter the **Patient Information** into this form.
  4. After entering/modifying the patient information, select **Save** 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 button** from the **Insurance** list.
5. Enter the **Insurance information** into this form.
6. After entering/modifying the insurance information, select **Save** to save the insurance record for the patient.
7. Finally, select **Go-to > Back** to return to the patient information form.

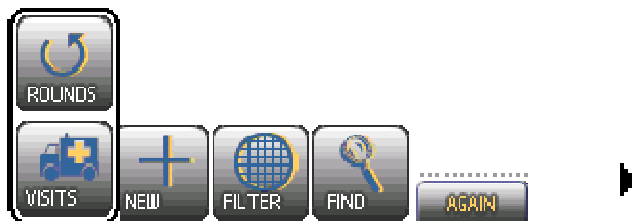
## 3.0 Rounding Database

- 3.1 Adding a rounding patient

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

**PB Patients**

First Name	Middle Na	Last Na
Margaret	Mary	Lissner



2. Select the **New** button from the **Rounds** screen.

**PocketBilling 4** ▼ All Hospitals

▼ Not Seen Today ▼ Admitted

**Last Name** **First Name** **MR Num**



- 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.

Patient Information	
<b>[Select Patient From List]</b>	
First Name	<input type="text"/>
Last Name	<input type="text"/>
Med Rec#	<input type="text"/> #
<b>Last Rounded</b>	
▼ No Date	
<b>Diagnosis</b>	<b>Meds</b> <b>Notes</b>
Info	Admission   Visits   Adv
Save	Cancel   Go-to

Patient Information	
<b>[Select Patient From List]</b>	
First Name	John
Last Name	Donahue
Med Rec#	123456 #
<b>Last Rounded</b>	
▼ No Date	
<b>Diagnosis</b>	<b>Meds</b> <b>Notes</b>
Info	Admission   Visits   Adv
Save	Cancel   Go-to

3. Initial diagnosis data may be entered here.

**Patient Initial Diagnosis**  
**[Select Initial Diagnosis]**  
**Diagnosis Code**   
**Diagnosis Description**   
**Back**

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

### **PB Diagnoses**

<b>Description</b>	<b>Code</b>
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, unsp	789.30



Patient Initial Diagnosis	
[Select Initial Diagnosis]	
Diagnosis Code	719.46
Diagnosis Description	
Pain, knee	
<input type="button" value="Back"/>	

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

Admission Information	
Admit Date	▼ 2/3/07
Discharge Date	▼ No Date
Hospital	
▼ Hospital1	
Room Number	
Info	Admission
Visits	Adv
Save	Cancel
Go-to	↑

6. Finally, select **Save** to save the patient.

<b>PocketBilling 4</b> ▼ All Hospitals		
▼ Rounded Any Date ▼ Admitted		
<b>Last Name</b>	<b>First Name</b>	<b>MR Num</b>
Donahue	John	123456



## 3.2 Using the available Rounding filters

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

A screenshot of a software window titled 'PB Patients'. The window contains a table with the following data:

First Name	Middle Na	Last Na
Margaret	Mary	Lissner

At the bottom of the window is a navigation toolbar with buttons: 'ROUNDS' (refresh icon), 'VISITS' (ambulance icon), 'NEW' (plus sign), 'FILTER' (globe), 'FIND' (magnifying glass), and 'AGAIN' (dashed line with arrow). A mouse cursor is pointing at the 'AGAIN' button.

2. From the **Rounds** screen.

**PocketBilling 4** ▼ All Hospitals  
▼ Rounded Today ▼ Admitted

Last Name	First Name	MR Num
Donahue	John	123456

GO-TO NEW FILTER FIND AGAIN

- **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

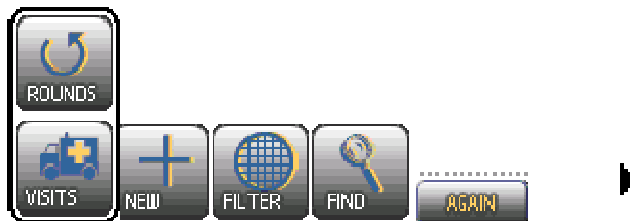
## 4.0 Visits Database

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

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

## PB Patients

First Name	Middle Na	Last Na
Margaret	Mary	Lissner



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

## PocketBilling 4

▼ All Hospitals

▼ Rounded Any Date ▼ Admitted

Last Name	First Name	MR Num
Donahue	John	123456



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

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
Save	Cancel	Go-to	

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

PB Visits		
▼ Visits without Charges		
MRNum	Visit Date	Initial C



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.

The image displays two screenshots of a medical software interface, illustrating the process of selecting a diagnosis. Both screenshots show the 'Visit Main Information' section with 'Med Rec#' 123456 and 'Visit Date' 2/3/07. Below this is the 'Diagnoses' section with four rows labeled 'Dx 1' through 'Dx 4'. Each row has a 'more' button to its right. At the bottom of the 'Diagnoses' section are tabs for 'Visit', 'Initial', 'Sub', 'Amb', 'Proc', and 'More', along with 'Save', 'Cancel', and 'Go-to' buttons. An arrow points from the 'Initial' tab in the top screenshot to the 'Initial' tab in the bottom screenshot. In the bottom screenshot, the 'Dx 1' field is populated with the text 'Sprain/strain:'.

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:

**Initial Charges**

[Select from List]

[Generate E&M Code]

[Time Based Coding]

Code

Description

Amount

Submit Date ▼ No Date


Related Diag ▼ No **show**

Visit Initial Sub Amb Proc More

Save Cancel Go-to ↑

#### 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.

Initial Charges	
[Select from List]	
[Generate E&M Code]	
[Time Based Coding] <input type="checkbox"/>	
Code	
Description	
Amount	
Submit Date	▼ No Date
Related Diag	▼ No <span style="float:right">show</span>
Visit	Initial
Sub	Amb
Proc	More
Save	Cancel
Go-to	
E & M Coding Wizard	
Guideline Selection	
Choose which guideline you would like to use in the coding wizard.	
1995	
1997	
Cancel	

2. 4.1.2 Selecting from E&M code list

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

Code	Description	Ti
99221	Initial-Low	10
99222	Initial-Mod	20
99223	Initial-High	30
99218	Observation-Low	
99219	Observation-Mod	
99220	Observation-High	
99217	Observation-Disch	
99251	Initial Consult-Focus	20



### 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.

Initial Charges	
[Select from List]	
[Generate E&M Code]	
[Time Based Coding] <input type="checkbox"/>	
Code	99221
Description	Initial-Low
Amount	
Submit Date	▼ No Date
Related Diag	▼ No <span>show</span>
Visit	Initial
Sub	Amb
Proc	More
Save	Cancel
Go-to	↑

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

PB Visits		
▼ Visits With Charges		
MRNum	Visit Date	Initial C
123456	2/3/07	99221



10. To update the patient's **Last Rounded** date, select **Back** from the **Go-to Menu**

**PB Visits**

▼ Visits With Charges

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



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

The image shows a patient information form with two states. The top state shows the 'Last Rounded' dropdown menu open, with 'Today' selected. The bottom state shows the dropdown menu closed, with '2/3/07' displayed. An arrow points from the top state to the bottom state.

Patient Information		
[Select Patient From List]		
First Name	John	
Last Name	Donahue	
Med Rec#	123456 #	
Last Rounded		
Today		
Tomorrow		
One Week		
No Date		
Choose Date..		
Meds	Notes	
Visits	Adv	
Save	Cancel	Go-to

Patient Information			
[Select Patient From List]			
First Name	John		
Last Name	Donahue		
Med Rec#	123456 #		
Last Rounded			
▼ 2/3/07			
Diagnosis	Meds	Notes	
Info	Admission	Visits	Adv
Save	Cancel	Go-to	

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

<b>PocketBilling 4</b>	▼ All Hospitals	
▼ Rounded Today	▼ Admitted	
<b>Last Name</b>	<b>First Name</b>	<b>MR Num</b>
Donahue	John	123456



## 4.2 Using the available Visit Database filters

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

<b>PB Patients</b>		
<b>First Name</b>	<b>Middle Na</b>	<b>Last Na</b>
Margaret	Mary	Lissner

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

**PocketBilling 4** ▼ All Hospitals  
▼ Rounded Any Date ▼ Admitted

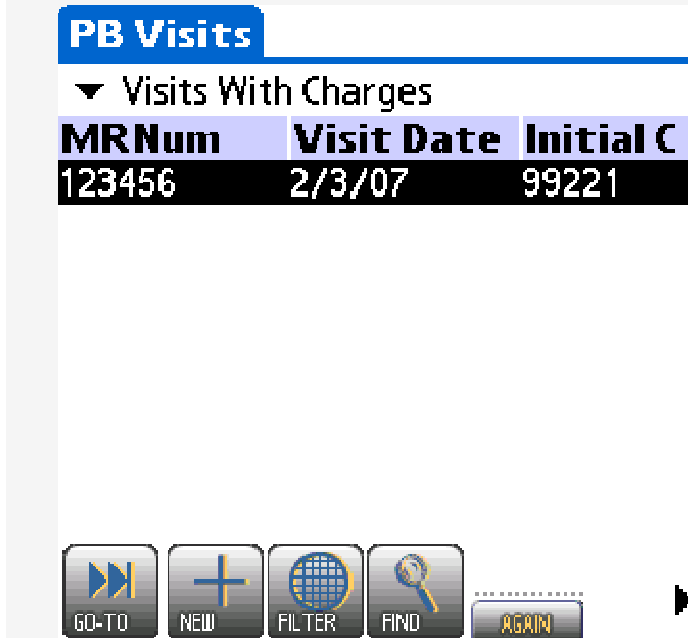
Last Name	First Name	MR Num
Donahue	John	123456



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

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
Save	Cancel	Go-to	

4. From the **Visits** screen.



- 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 (**Rounds, 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 (**Rounds, 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 (**Rounds, 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 (**Rounds, 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 button** 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 commit 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.