Modifying a Charge Slip in Practice Manager

From time to time you may find that you need to make changes to your charge slip. When modifying your charge slip there are typically five steps involved:

1. Finding what charge slip you use,
2. Locating the charge slip in the Practice Manager directory,
3. Making a copy of your charge slip, and
4. Modifying the actual charge slip.

The following sections will walk you through each of these steps.

Finding the Charge Slip to Modify — Use the following steps to find which charge slip you use so you can modify the correct charge slip.

Step 1 – Click the **Documents** tab.

Step 2 – In the **Patient Account** tab access any patient.

Step 3 – Click the **Charge Slip** tab.

Step 4 – In the **Use This Charge Slip** field, find the charge slip you wish to modify, and then note the name of it. See Figure 1.

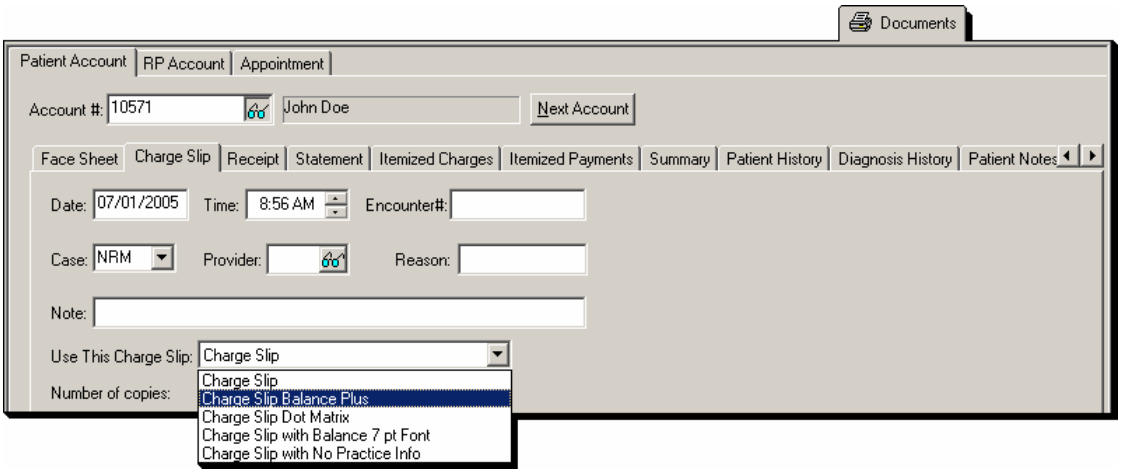


Figure 1 – The Document – Patient Account – Charge Slip Screen

Step 5 – Click **Administration/Code Tables/System Document Setup**.

Step 6 – Looking in the Description column, highlight the **Charge Slip noted in step 4**, and then click the **Edit** button.

Step 7 – Note the information in the **File 1** field. This is the name of the charge slip as it will appear in the Practice Manager directory. See Figure 2.

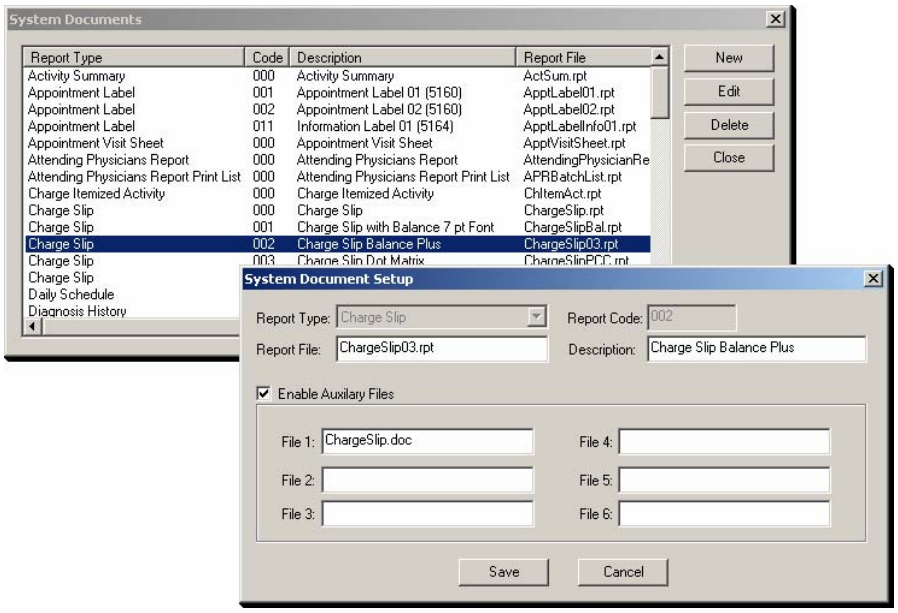


Figure 2 – Accessing the System Document Screen for a Charge Slip

Step 8 – Click the **Cancel** button, and then click the **Close** button.

Locating the Charge Slip in the Reports Folder— After you have found the name of the charge slip as it will appear in the Reports folder, you can now locate that file. Use the following steps to locate the charge slip in the Reports folder.

Step 1 – Right-click the **Practice Manager** icon on your desktop, and then click **Properties**.

Step 2 – In the Practice Manager for Windows Properties screen, click the **Find Target** button. See Figure 3.

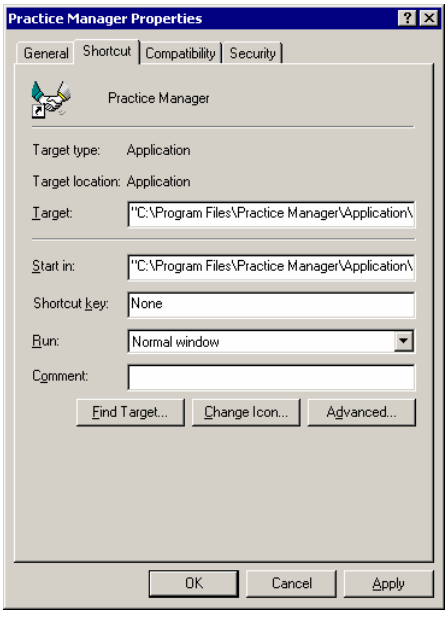


Figure 3 – The Practice Manager for Windows Properties Screen

Step 3 – A screen will appear with several icons. This is the Application folder of the Practice Manager directory. Your charge slip is in the **Reports** folder of the Practice Manager directory. On the toolbar, click the **Up** button. See Figure 4.

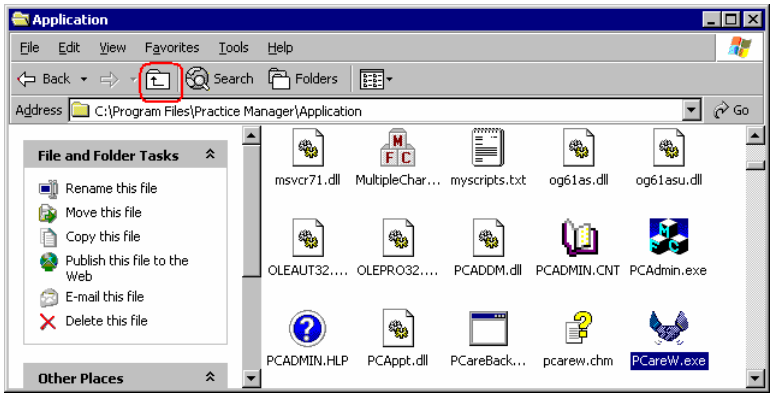


Figure 4 – The Practice Manager Application Directory

Step 4 – Double-click the **Reports** folder. See Figure 5.

Step 5 – Locate and highlight your charge slip.

NOTE
The name of your charge slip will be the name of the file in the File 1 field in Step 7 of the Finding the Charge Slip to Modify section above.

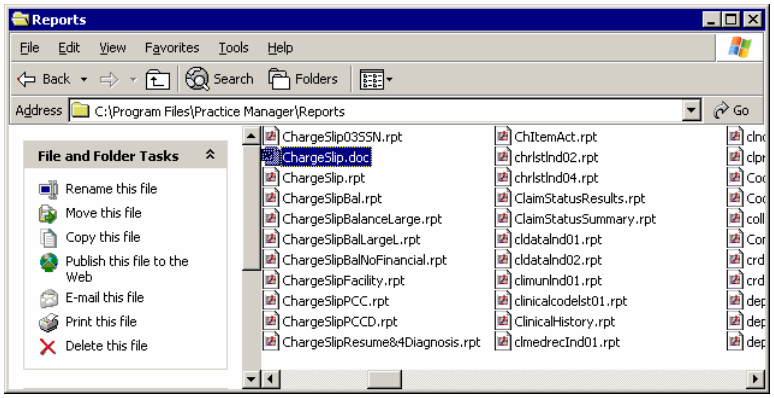


Figure 5 – The Practice Manager Reports Directory

Making a Copy of your Charge Slip — Once you have located your charge slip, it is strongly recommended that a copy of your charge slip be made in the case that something goes wrong while you are making changes to your original document. Use the following steps to make copies of the charge slip.

Step 1 – Right-click your charge slip, and then click **Copy**.

Step 2 – Minimize all windows by clicking the Minimize button (the button with an underline in it) in the top-right corner so that your desktop appears.

Step 3 – Right-click your desktop and then select **Paste**. See Figure 6. A copy of your original charge slip will appear on your desktop.

NOTE
When pasting your charge slip to the desktop be sure **NOT** to select Paste Shortcut.

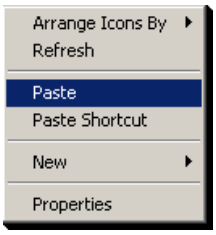


Figure 6 – The Desktop Right-Click Menu

Modifying the Charge Slip — Once the copy has been made of your charge slip, you can now make the appropriate changes to the file in the Reports directory (the copy on your desktop should be used as a backup, should something go wrong, or if you want to revert back to the orginal). Some knowledge of Microsoft Word is needed when modifying charge slips. To modify a charge slip, click the Reports button on your task bar (see Figure 7), double-click the charge slip you wish to modify, and then make any desired changes to your document. Keep in mind that this document was set up with very specific proportions so that the text will remain in the space that was provided for it. Be sure to save any changes that are made (click File/Save). Please call the Practice Manager Support Hot Line if you have any questions.



Figure 7 – The Task Bar