PRACTICE MANAGER QUICK REFERENCE CARD

PATIENTS

Add a Patient

- Select the **Patient** tab.
- Type **A** and then press **Enter**.
- Enter the patient demographic information.
- Click **Save**.

Find a Patient

- Select the **Patient** tab.
- Click the Eyeglasses or press **F3**.
- Enter part of Patient's last name
- Click **Find**.
- Highlight correct Patient account and press **Enter**.

Edit a Responsible Party or Subscriber

- Click into the **Responsible Party** or **Subscriber** field
- Press the **F2** key.
- Edit the Responsible Party or Subscriber information.
- Click the **Save** button.

Patient Face Sheet

- Select the **Documents** tab.
- Select the **Patient Account** tab.
- Click the **Face Sheet** tab.
- Look up the patient.
- Choose either **Patient Release** or **Medicare Release**.
- Click the **Print** button.

CHARGES

Entering a Charge

- Click the **Charge** tab.
- Click the **Enter a Charge** tab.
- Enter information from Encounter/Charge Slip form.
- If additional procedures are needed click **Next Procedure**.
- When finished entering all procedures click **Save**.

Quick Pay

To use Quick Pay, the co-pay must have been entered in Patient screen.

- Click the **Quick Pay** button after entering all charges.
- The copayment amount is displayed. Enter the **Check#**, if needed.
- Enter the **Payment Type**.
- Click the **Save** button, or the **Receipt** button to print the patient a receipt.

Edit/Delete a Charge

- Click the **Charge** tab.
- Click the **Review Charges** tab.
- Highlight the charge you want to Edit or Delete.
- To delete the charge, click the **Delete** button, and then select the **Yes** button to accept.
- To edit the charge, click the **Edit** button.
- Correct or Add to the Charge information.
- Click the **Save** button.

Editing Multiple Charges

- Click the **Charge** tab.
- Click the **Review Charges** tab.
- Highlight the charges you want to edit by pressing the **CTRL** key and clicking on each applicable charge. (Charges must have the same case.)
- Click the **Edit** button.
- Correct, Add to the Charge information, and/or Regenerate the Charge.
- Click the **OK** button.

Regenerate a Charge

- Click the **Charge** tab.
- Click the **Review Charges** tab.
- Highlight the charge that needs to be regenerated.
- Click the **Edit** button.
- Change the **Bill Status** to a **B**.
- **Delete** any date in the **Date Billed** field.
- Click the **Save** button.

KEYBOARD FUNCTIONS

F1: HELP KEY - Displays description of selected field.
F2: Subscriber/RP LOOK UP - Add/edit information.
F3: LOOK UP - Search using name or description.
F4: DATE –Opens calendar; Also open/close a drop-down list; Also search using In-house code.
Arrow keys: Moves date up and down in date field; Also curser moves throughout text without deleting it.
T: Today's date when in date field.
F8: LAST ACCOUNT – Retrieve last patient account.
Shift + F8: LAST 5 - Display last five patient accounts.

Tab: Navigate from field to field.
Shift + Tab: Move backward to previous field.
Enter: Activate selected buttons or commands. Can be defined to mimic the Tab key.
Esc: Close certain dialog boxes and drop-down lists.
Spacebar: Activate certain selected buttons and commands.
Del: Clear a selection made from a drop-down list.
Shortcut keys: Ctrl and/or Alt keys may be used to activate buttons or navigate fields. i.e., Alt + underlined letter in the desired field. Shortcut keys are listed to the right of the associated items.

PRACTICE MANAGER QUICK REFERENCE CARD

PAYMENTS

Enter a Payment

- Click the **Payment** tab.
- Click the **Make a Payment** tab.
- Check the charge you want to apply the payment to.
- Enter the **Allowed**, **Deductible**, **Paid**, **Type**, **Write Off**, **Code**, and check the **Who Paid** field.
- Select a patient statement **Msg**, if needed.
- Enter the **Check #** and **Date Paid**
- Click the **Save** or the **Save & Receipt** button, or click the **Next Account** button to enter another payment for an EOB check.

Applying a Credit

- Click the **Payment** tab.
- Click the **Make a Payment** tab.
- Check the **Credits** box.
- Click on the drop down box next to Refund, and choose **RAB Refund Applied to Balance**.
- Check the charge line you want to apply the credit to.
- Click the **Save** button.

Delete a Payment

- Click the **Payment** tab.
- Click the **Review Payments** tab.
- Check the payment you want to delete.
- Click the **Delete** button.
- Click the **Yes** button to accept the deletion.

Edit a Payment

- Click the **Payment** tab.
- Click the **Review Payments** tab.
- Click in the fields on the line of the payment you want to change, and make your changes.
- Click the **Save** button.

DAILY REPORTS

Charge Edit Report

- Click the **Reports** tab.
- Click the **Daily** tab.
- Click the **+** sign next to the **Charge Edit** report.
- Click the **Short** report type.
- Click the **Advanced Configurations** drop-down list.
- Highlight **My Charges Today by Transaction, Account** or the desired configuration, and then modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

Deposit Edit Report

- Click the **Reports** tab.
- Click the **Daily** tab.
- Click the **+** sign next to the **Deposits** report.
- Click the **Deposit Slip** report type.
- Click the **Advanced Configurations** drop-down list.
- Highlight **Today's Deposit by User**, or the desired configuration, and then modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

Payment Edit Report

- Click the **Reports** tab.
- Click the **Daily** tab.
- Click the **+** sign next to the **Payment Edit** report.
- Click the **Short** report type.
- Click the **Advanced Configurations** drop-down list.
- Highlight **My Payments Today by Account,** or the desired configuration, and then modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

MONTH END OPERATIONS

Close Month End

- Click **Add-Ins > Month End Operations**.
- Select the **Practice(s)** you want to close for Month End.
- Enter the **Date** for Month End. This should be the last day of the month.
- Click the **Close Month End** button.
- Print the Month End Summary report, as needed.
- Close out of the report, and click the **Done** button when finished.

NOTE
It is recommended that everyone exit Practice Manager, and a backup be run immediately before running Month End.

Printing Month End Reports

- Click the **Reports** tab.
- Click the **Batch Reports** sub-tab.
- Select the **Batch Name** for your Month End Reports.
- Click the **Print** button.

NOTE
See the Month End Report Recommendations section in the Quick Reference for Reports for information on how to configure the recommended month end reports.