Preface

## CiMO™: The Step-by-Step, Hands-On Approach…Case Studies: The Next Application of the Hands-On Approach

Welcome to the eighth edition of *Case Studies for use with Computers in the Medical Office!* This product reinforces the concepts and skills your students will need for a successful career in medical office billing, building on what they learned in *Computers in the Medical Office (CiMO),* 8e. It presents a capstone billing simulation, providing your students with hands-on practice with realistic source documents. Just like with *CiMO*, *Case Studies* gives not only the step-by-step instructions your students need to learn but also the "why" behind those steps.

Case Studies provides students with enhanced learning opportunities that lead to superior qualifications for employment in medical offices. The product contains a realistic and extensive simulation covering two weeks of billing work in a medical office. Students use Medisoft® Advanced Version 17, a widely distributed medical office administrative software program, to complete the simulation. In addition to practicing and reinforcing their Medisoft® skills, *Case Studies* introduces fourteen new Medisoft® training topics that expand their knowledge. Students must exhibit critical thinking and problem solving to pull together the resources they will need to handle their daily assignments.

The prerequisite for successful completion of *Case Studies* is a basic knowledge of Medisoft® Advanced Version 17, which can be gained by studying *CiMO,* 8e (0073402133, 9780073402130).

Here's what you and your students can expect from *Case Studies:*

- Coverage of Medisoft® Advanced Version 17 patient billing software, a full-featured software program, including screen captures showing how the concepts described in the book actually look in the medical billing software.
- Both a tutorial and a simulation of Medisoft®, using a medical office setting, Polaris Medical Group, and related patient data.
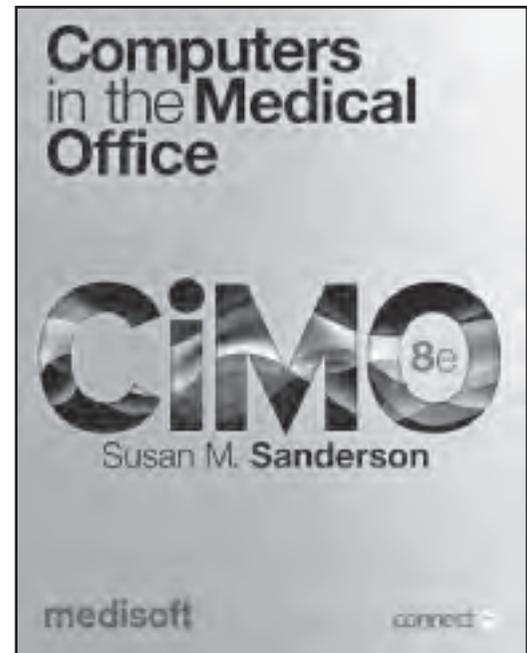
- A program that builds important skills for handling computerized billing tasks in medical offices.

- A chance to perform various jobs during the simulation, reinforcing essential skills such as inputting patient information, scheduling appointments, and handling billing, reports, and insurance claims.

- An opportunity for students to exhibit the ability to research facts, think through priorities, and analyze problems.

- Realistic exercises, completed using Medisoft®, that cover what students will see working in actual medical practices, no matter what software those practices might use.

- An understanding of the medical billing cycle and how completing the related tasks will positively affect the financial well-being of a medical practice.

Organization of *Case Studies,* 8e

Case Studies is divided into four parts:

Part	Coverage
1: Introduction to Polaris Medical Group	Sets the stage for the rest of the book. Based on the idea that Polaris Medical Group (PMG) has recently hired you. PMG is a general practice with a complex environment of patient cases, insurance affiliations, and schedule demands. Introduces the practice's staff, describes the guidelines for working with medical office records, and details the role of the patient services specialist, which the students will perform in the simulation.
2: Polaris Medical Group Policy and Procedure Manual	Covers PMG's general policies and employment procedures. Has detailed guidelines on processing new patient registration and referrals, scheduling appointments, and billing. Also contains detailed information sheets on the insurance carriers with which the practice interacts.
3: On the Job *This section requires the use of Medisoft® Advanced Version 17.	Requires students to perform a series of assignments using Medisoft®. Each day of the ten-day assignment at PMG contains applications of the knowledge required in a medical office. Medisoft® training topics are introduced in the text at the points students need the knowledge to complete the specific tasks. Special tips are provided in Part 3. Health Plan Information Pages at the end of Part 2 give details about the insurance coverage percentages for the health plans used in Part 3. At the end of each day's jobs in Part 3, a daily worksheet is provided to help verify that the work was completed correctly.
4: Source Documents	Provides the patient data needed to complete the daily tasks in Part 3. The variety of completed forms, similar to those used in medical offices, includes patient information forms, encounter forms, coding notes, chart notes, remittance advices, and audit/edit reports.

New to the Eighth Edition

The eighth edition of *Case Studies* reflects a major change that is coming in the health-care field—the change from ICD-9-CM diagnosis codes to ICD-10-CM codes. While the government has delayed the compliance deadline for ICD-10-CM until October 1, 2014, students should begin working with the new codes now, so they have experience with ICD-10-CM before entering the job market. This experience will provide students with a competitive advantage over students just starting their ICD-10-CM training.

Users familiar with earlier editions of *Case Studies* will also notice that we have moved from Medisoft® Version 16 to Medisoft® Version 17 this time, rather than our usual practice of moving up two versions of Medisoft®. We did this because Medisoft® Version 17 was already on the market and was ICD-10-CM and HIPAA 5010 ready, while Medisoft® Version 18 is not expected to be released until the fourth quarter of 2012, or later. We wanted our students to start preparing for this major transition as soon as possible.

We have also changed the edition to 8e rather than 7e so that *Computers in the Medical Office* and *Case Studies for use with Computers in the Medical Office* now share the same edition number.

Key changes include:

- Software
  — Medisoft® Version 17 is used for all databases and illustrations (screen captures).
  — ICD-10-CM codes are included in the diagnosis code database.

- HIPAA/Federal Legislation-Related
  — Content and database enhanced to accommodate new HIPAA 5010 transactions (the new version of the X12 standards for HIPAA transactions).

- Part 2
  — Enhanced coverage of office policy regarding smartphones, tablet computers, and social networking.

- Part 4
  — All source documents updated for ICD-10-CM and HIPAA 5010.

For a detailed transition guide between the sixth and eighth editions of *Case Studies,* visit www.mhhe.com/cimo8e.

To the Instructor

McGraw-Hill knows how much effort it takes to prepare for a new course. Through focus groups, symposia, reviews, and conversations with instructors like you, we have gathered

information about what materials you need in order to facilitate successful courses. We are committed to providing you with high-quality, accurate instructor support.

Using Medisoft® Advanced Version 17 with *Case Studies*

medisoft®   *Case Studies* features Medisoft® Advanced Version 17 patient accounting software. Students who complete *Case Studies* find that the concepts and activities in the textbook are general enough to cover most administrative software used by healthcare providers. McGraw-Hill has partnered with Medisoft® from the very beginning, going back fifteen years to when the software was DOS-based! The support you receive when you are using a McGraw-Hill text with Medisoft® is second to none.

Your students will need the following:

- Minimum System Requirements
  - Pentium 4
  - 1.0 GHz (minimum) or higher processor
  - 500 MB available hard disk space
  - 1 GB RAM
  - 32-bit color display (minimum screen display of 1024 × 768)
  - Windows XP Professional SP3 or higher 32-bit
  - Windows Vista Business SP1 or higher 32-bit
  - Windows 7 Professional or Ultimate 32- or 64-bit
- External storage device, such as a USB flash drive, for storing backup copies of the working database
- Medisoft® Advanced Version 17 patient billing software
- Student Data Files, available for download from the book's Online Learning Center, www.mhhe.com/cimo8e

Instructor's Software: Medisoft® Advanced Version 17 CD-ROM

Instructors who use McGraw-Hill Medisoft®-compatible titles in their courses receive a fully working version of Medisoft® Advanced Version 17 software, which allows a school to place the live software on the laboratory or classroom machines. Only one copy is needed per campus location. Your McGraw-Hill sales representative will help you obtain Medisoft® for your campus.

Another option is the Student At-Home Medisoft® Advanced Version 17 CD (0077445252, 9780077445256). A great option for online courses or students who wish to practice at home. Available individually or packaged with the textbook—it's up to you!

Much more information on how to work with each of the Medisoft® options can be found in the *McGraw-Hill Guide to Success for CiMO,* 8e at www.mhhe.com/cimo8e. The guide covers the following topics: software installation procedures for both the Instructor Edition and the Student At-Home Edition of Medisoft®, Student Data File installation procedures, use of flash drives, backup and restore processes, tips and frequently asked questions, instructor resources, and technical support.

Instructors' Resources

You can rely on the following materials to help you and your students work through the material in the book, all of which are available on the book's website, www.mhhe.com/cimo8e (instructors can request a password through their sales representative). Please note that all of the resources for the *Case Studies* book are now on the same website as the resources for *CiMO*.

Supplement	Features
Instructor's Manual (organized by Learning Outcomes)	-Sample syllabi and lesson plans -Answer keys for all exercises with tagging for Learning Outcomes, level of difficulty, and level of Bloom's Taxonomy -Documentation of steps and screenshots for Medisoft® exercises
PowerPoint Presentations (organized by Learning Outcomes)	-Key terms -Key concepts -Teaching notes
Tools to Plan Course	-Correlations of the Learning Outcomes to accrediting bodies such as CAHIIM, ABHES, and CAAHEP -Sample syllabi and lesson plans -Conversion guide for *Case Studies*, 6e to *Case Studies*, 8e -Asset map—clickable PDF with links to all key supplements, broken down by Learning Outcomes
Medisoft® Advanced Version 17 Tools	-*McGraw-Hill Guide to Success for CiMO,* 8e -Technical support information -Installation directions -Student Data File -Backup and restore directions and files for Medisoft® use. (The Medisoft® backup files are an important resource if a student makes mistakes with his or her data and you want the student to have the correct data to start the next chapter.) -Instructions on how to load Student Data File for two books at the same time (i.e., *CiMO* and *Case Studies*)
CMS-1500 and UB-04 Forms	-Electronic versions of both forms

Need help? Contact McGraw-Hill's Customer Experience Group (CXG). Visit the CXG website at www.mhhe.com/support. Browse our FAQs (Frequently Asked Questions), browse the product documentation, and/or contact a CXG representative. CXG is available Sunday through Friday.

Want to learn more about this product? Attend one of our online webinars. To learn more about the webinars, please contact your McGraw-Hill sales representative. To find your McGraw-Hill representative, go to www.mhhe.com and click "Find My Sales Rep."

To the Student

Make Sure Medisoft® Version 17 Is Installed on Your School's Computer

Before you can complete the jobs in Part 3 of this text, you must make sure that Medisoft® Version 17 (the actual software program) is installed on your school's computer. It is possible that Medisoft® Version 17 has already been installed on the computer you are using. If this is the case, you do not need to install it again.

Be sure to download a copy of the **McGraw-Hill Guide to Success for CiMO,** *8e from the Information Center of the book's website at* www.mhhe.com/cimo8e *for much more detail on the items mentioned in this section.*

With this 8th edition of *Case Studies*, **there are two options to access Medisoft®. Students, please be sure to check with your instructor for the option you will use in your class.**

Install the Medisoft® Program from a CD and Download the Student Data File

The Student Data File contains the medical practice, physicians, and patients required to complete the exercises in Part 3.

1. **If you are using a computer at your school [Instructor Edition CD]**

   Medisoft® will most likely already be installed on the computer, in which case you don't need to install the program. You do still need to download and install the Student Data File (see below).

2. **If you are working on your own computer [Student At-Home Edition CD]**

   You will need to purchase the Student At-Home Medisoft® CD and install the program on your computer. You also need to download and install the Student Data File (see page xiii).

Instructions

1. **If you are using a computer at your school [Instructor Edition CD]**

Step 1: Determine whether Medisoft® Advanced Version 17 is installed on your school's computer. (If it is already installed, skip to step 3.) To find out if it is installed:

    a. Click the Start button, select All Programs, and look for the Medisoft® folder. If you find a Medisoft® folder, click Medisoft® Advanced to launch the program. Once the program is open, determine which version of Medisoft® is installed. Click Help on the menu bar and then click About Medisoft®. Look in the window that appears, which lists the version number of the program.

Look for Version 17
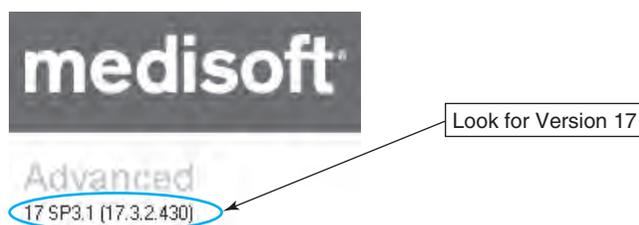
    b. If you see Version 17, skip to step 3.

Step 2: Install Medisoft® Version 17 if it is not already on your school computer. ***Students, please check with your instructor before proceeding.***

    a. To install the software from the CD, go to the "Guide" for instructions.

Step 3: Check to see if the CIMO8e Student Data File is installed. To find out if it is installed:

    a. Start Medisoft® Advanced Version 17 by double-clicking the desktop icon. Look at the title bar that contains the words "Medisoft Advanced 17." If the CSMO8e Student Data File has already been installed, you should see "CSMO8e" to the right of "Medisoft Advanced 17".

Look for CSMO8e

    b. If you see CSMO8e, close the program and you will be ready for Part 3! If not, proceed to step 4.

Step 4: Install the CSMO8e Student Data File if your computer does not have it.

    a. Go to www.mhhe.com/cimo8e and click on the Student Edition link.

    b. Click on the link for the Medisoft Case Studies Tools page.

c. Read the *McGraw-Hill Guide to Success for CiMO, 8e,* which will walk you through downloading to your computer the zip file with the Student Data File installer.

d. **Warning:** Make sure you do not have the Medisoft® program open on your computer when you install the Student Data File.

2. **If you are working on your own computer [Student At-Home Edition CD]**

To purchase a copy of this optional version, check with your instructor first.

Step 1: To install the software from the CD, go to the "Guide" for instructions.

Step 2: To install the CSMO8e Student Data File, refer back to step 4 above.

Need help? Contact McGraw-Hill's Customer Experience Group (CXG). Visit the CXG website at www.mhhe.com/support. Browse our FAQs (Frequently Asked Questions), browse the product documentation, and/or contact a CXG representative. CXG is available Sunday through Friday.

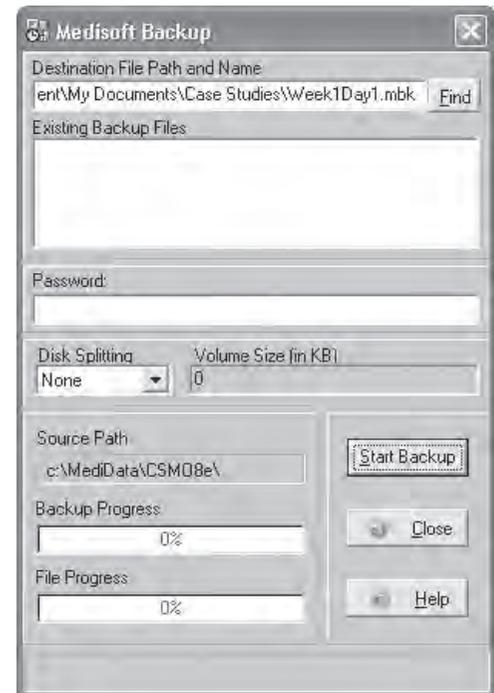## Backing Up Data in Medisoft®

If you are in a school environment, it is important to make a backup copy of your work after each Medisoft® session. This ensures that you can restore your work during the next session and be able to use your own data even if another student uses the computer after you or if, for any reason, the files on the school computer are changed or corrupted. This section provides instructions on backing up data in Medisoft®.

1. You can use the Backup option on the File menu to back up your data at any time. However, by default, Medisoft® also gives you the opportunity to back up your data each time you exit the program. Click the Exit option on the File menu to exit Medisoft®.

2. The Backup Reminder dialog box appears. You will back up your data to the folder where you are storing your work for this course, for example, C:\...\My Documents\ CaseStudies, and you will name the backup file according to the day of the simulation you are working on in the text. Click the Back Up Data Now button.

3. The Medisoft Backup dialog box appears. If the Destination File Path and Name box at the top of the dialog box does not show the folder where you will be storing your work (whichever folder was last used is displayed by default), use the Find button to locate this folder on your computer.

4. Once the correct destination folder is displayed in the Medisoft Backup dialog box, you are ready to key in the backup file name at the end of the path name. The backup file must end with the .mbk extension (which stands for Medisoft® backup data). All Medisoft® backup files end with the extension *.mbk.*

Using the End key or the right arrow key on the keyboard, move the cursor to the end of the path name. Depending on whether a backup file already exists in the

destination folder, the end of the path may or may not display a file with the .mbk extension. If no file with the .mbk extension appears, simply key in the new file name, *Week1Day1.mbk* (for the first day of the simulation), at the end of the path name. If a backup file is already displayed, use the backspace key to delete the old file name and key in the new one. The end of the path should now read: \Week1Day1.mbk, as shown in the following example. (*Note:* If you are sharing a computer, you may want to add your initials to the beginning of the file name.)

5. After the correct file name has been entered in the Destination File Path and Name box, click the Start Backup button to begin the backup.

6. Medisoft® backs up the data under the new name and displays an Information box indicating that the backup is complete. Click the OK button to close the Information box.

7. Click the Close button to close the Medisoft Backup dialog box. Then exit the Medisoft® program.

8. For safekeeping, copy your new backup file from the current drive on the computer to an external storage device, such as a flash drive. A separate backup copy prevents you from losing your work if the current drive fails or if you or someone else accidentally deletes data on the computer.

Restoring Data in Medisoft®

If you are sharing a computer with other students in a school environment, you will need to perform a restore before a new Medisoft® session to be certain you are working with your own data. If necessary, follow these steps to restore your latest backup file.

To restore the file *Week1Day1.mbk* to c:\MediData\CSMO8e:

1. Copy your backup file from your external storage device to the assigned location on the computer you are using. (Ask your instructor if you are not sure which folder this is.)

2. Start Medisoft®.

3. Check the program's title bar at the top of the screen to make sure CSMO8e is displayed as the active data set. (If it is not, use the Open Practice option on the File menu to select it.)

4. Open the File menu, and click Restore Data.

5. When the Warning box appears, click OK. The Restore dialog box appears.
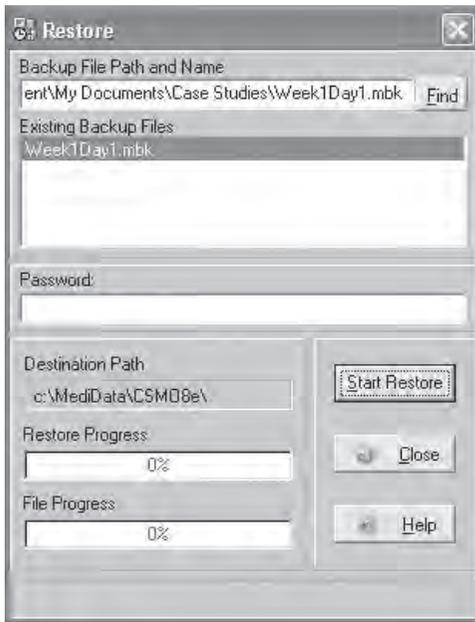
6. Use the Find button to locate your assigned storage folder (the folder used in step 1 above). Locate *Week1Day1.mbk* in the list of existing backup files displayed for that folder, and click on it to attach it to the Backup File Path and Name at the top of the dialog box. (The end of the path name should read \...\ Week1Day1.mbk.)

7. The Destination Path at the bottom of the box will automatically display c:\MediData\CSMO8e. Your screen should look like the one shown here.

8. Click the Start Restore button.

9. When the Confirm box appears, click OK.

10. An Information dialog box appears indicating that the restore is complete. You have successfully restored the *Week1Day1.mbk* file for use with Medisoft® for the next session. Click OK to continue and then click the Close button to close the Restore dialog box.

11. The Restore dialog box closes. You are ready to begin working.