



## Step-by-step claim form ALIGNMENT TROUBLESHOOTING

### Alignment with Form Offset

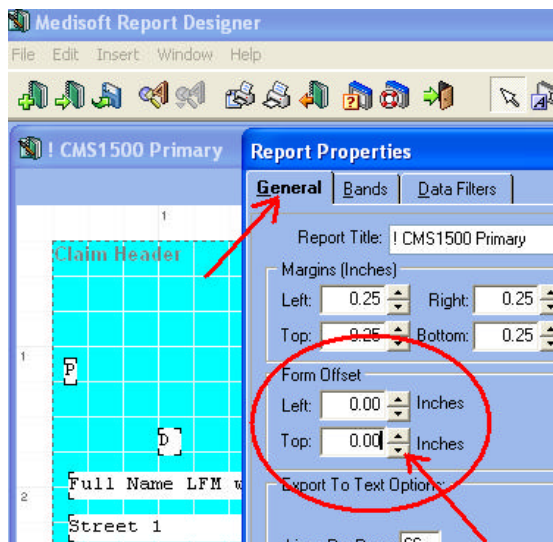
The most common problem is when the whole form is out of alignment, (the printed information is too far up, down, right, or left of the boxes).

Click 'Reports' 'Design Custom Reports and Bills'

'File' 'Open Report'

Double-click to open your insurance form

Then click 'File' 'Report Properties'



In the 'General' tab, under the 'Form offset' section you can change the left and top offsets. They are measured in hundredths of an inch, so if you increase the top offset from 0.00 to 0.25, it makes the offset larger and moves the information 1/4", (0.25 or 25/100 of an inch), lower on your form.

Effect of form offset field entries:

- ☛ Increase the 'Left', the whole form moves to the right
- ☛ Decrease the 'Left', the whole form moves to the left
- ☛ Increase the 'Top', the whole form moves down
- ☛ Decrease the 'Top', the whole form moves up

If you increase the offset and the fields move too low, try decreasing it, or increase the size by a smaller number.

When aligning a form to your printer, plan to use a number of forms because the key to this process is trial and error. Change the settings and reprint the form until the alignment is satisfactory. You may also print on plain paper, putting your form on top for viewing, but this method is less accurate.

Click 'File' 'Save As', and save the changed form with a new name each time so you always have a copy of the previous form. This ensures you have your originals in case you do not like the changes which were made.

### A shortcut for test printing

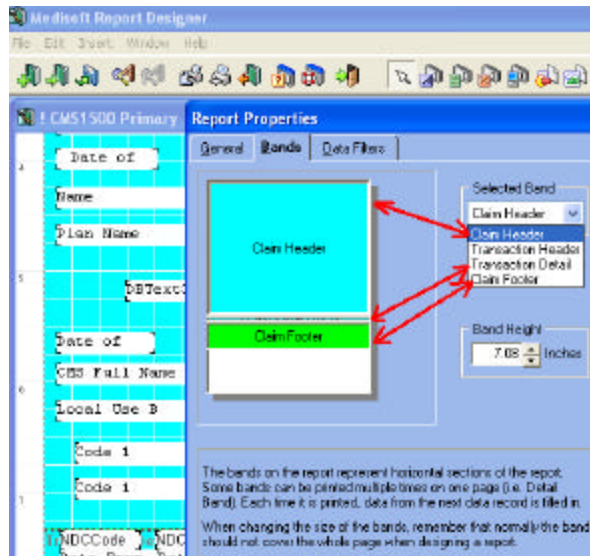
You do not need to close the Report Designer to print a sample claim, you can just click on 'File' and 'Print Report'. (First make sure that you have a claim ready in Claim Management: Click 'Activities' 'Claim Management', select a claim that has a status of 'ready to send', and note the claim number and batch number.) When printing a test claim, use the claim/batch number you chose and it will print the sample claim.

**Remember to make similar alignment changes for your secondary and tertiary insurance claim forms.**

## Bands - When the form offset is correct

The second most common type of misalignment is found on the bottom of the insurance form below the transaction box. It may print too high or too low, and the transaction area may have too many or too few transactions. This is easily corrected by adjusting the size of the bands.

Click 'File' 'Report Properties'



Click on the 'Bands' tab

Each band contains a different set of information:

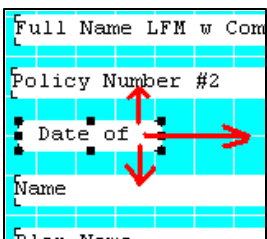
- Band One/Claim Header (large blue & white section on top) in the standard CMS-1500 form contains all the information from the top of the form through box 23.
- Band Two/Transaction Header is not used.
- Band Three/Transaction Detail (narrow blue and white section above the green band) contains the information in box 24.
- Band Four/Claim Footer (green and white footer band) contains the information in boxes 25 through 33.

Increasing the height of Band One moves all other bands down the page, decreasing it moves all the bands up. The up and down arrows increase or decrease the band size by quarter-inch increments, or you simply type in the measurement you want.

Band Four is measured from the bottom of the page, rather than from the top like bands one through three; increasing the height moves band four up, decreasing moves it down. Be careful changing the height of the band, so that you don't cover up any of the data fields.

***The prime directive of changing band height: NEVER ever change the height of band three, the detail band.***

## If band sizing doesn't work



If there are still fields out of alignment, the next step is to individually move the misaligned fields. Select the field by left clicking on it once with your mouse, then click and hold the mouse button down to drag the field to the desired location. For finer movement, select the field and use the arrow keys on the keyboard to move it right, left, up, or down. Each press of an arrow key moves the selected field 1/72 of an inch. Again, the key to this process is trial and error, change the settings and reprint the form until the alignment is satisfactory.

## Printers

If you compare how different printers print the same document, you'll see subtle differences in the type, spacing and margins. This is fine when you're printing a letter or some other free-form text document, but not when you are printing forms. Each Windows printer driver defines the printable area for a page, so if you use a different printer you may need to re-align the form.

## Report Bands

All Medisoft reports contain information organized into bands. Unlike an insurance claim form, a List Report only has three bands and a Patient Statement has six bands, but the alignment works in the same way for all of them. For reports, since you are not filling in a form but simply printing information, alignment is rarely needed, but you may want to move the information fields to customize your form to your needs.

## Support

If you would like one of our technicians to help you align your form, please call 888-691-8058 for support pricing options.