



Step-by-step claim form ALIGNMENT TROUBLESHOOTING

First, determine if the whole form is out of alignment (up, down, right, or left). If so, open the insurance form in MediSoft's Report Designer, then click File + Report Properties on the Report Designer's menu. Go to the General tab and the Form offset field.

Effect of form offset field entries

- If you put a positive number in the left offset, the whole form will move to the right
- If you put a negative number in the left offset, the whole form will move to the left
- If you put a positive number in the top offset, the whole form will move down
- If you put a negative number in the top offset, the whole form will move up

When the form offset is correct

Once the form offset setting is correct, alignment may be improved, if necessary, by increasing or decreasing the size of the bands. Each band contains a different set of information. Band one (blue header band) on the standard HCFA-1500 insurance claim form format contains all the information from the insurance company area at the top of the form through box 23. Band two is not used. Band three (detail, just above the green band) contains the transaction lines in box 24. Band four (green footer band) contains the information for boxes 25 through 33.

Guidelines for changing band size

The prime directive of changing band height - NEVER, EVER change the height of band three, the detail band. Increasing the height of band one moves all other bands down the page. Decreasing the height of band one moves all the other bands up. On the standard HCFA-1500 format, band two is not used. For band three, refer to the prime directive. Increasing the height of band four moves band four up. Decreasing the height of band four moves band four down. This is because the size of band four is measured from the bottom of the page, rather than from the top of the page like bands one through three.

Be careful when changing the height of any band so that you don't cover up any of the data fields. The key to this process is trial and error. If you change the size of a band and its fields move too high, try decreasing the size of the band or increasing the size by a smaller number. When aligning a form to your printer, plan on using quite a number of forms. It is also effective to print on plain paper and put your form on top for viewing, but this method is not as accurate.

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 that is out of alignment by clicking on the field once with your mouse. Next, place the mouse pointer on the selected field, then click and hold the mouse button down, dragging (moving) the mouse to the right or left, up or down. For finer movement, select the field that is out of alignment by clicking the field once, then 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. Continue to change the settings and reprint the form until the alignment is satisfactory.

Medisoft Advanced for Windows Forms Alignment Troubleshooting

A shortcut for test printing

You do not have to leave the Report Designer to print or display a sample claim. Just make sure that you have a printable claim in Claim Management. Click Activities + Claim Management on MediSoft's menu to display the Claim Management window. Select a claim that has a status of "ready to send." Note the claim number and batch number. In the Report Designer when printing a test claim, use the claim and batch numbers you read in the Claim Management window to select a sample claim.

One of the best things about Windows is that it controls your printer. One of the worst things about Windows is that it controls your printer. Before Microsoft Windows became enormously popular, software developers were required to do special programming for each different printer they wanted their software to support. Using software developed for the Windows environment makes it easy to use whichever printer you choose for your office.

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 so good when you're printing forms. It's possible that insurance claims printed by MediSoft for Windows may not exactly line up with the boxes. These alignment problems may be corrected by using the MediSoft Report Designer.

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

All MediSoft reports contain information organized into bands. A list report only has two bands, and an insurance claim format has four bands. Lists include two types of information: The heading of the list may contain the name of the report, the date that the report was printed, and column headings. The detail area of the list prints each detail item for the report. For example, a patient list would print patient information in the detail area, while an appointment list prints appointments in the detail area. These areas of the list are defined as bands – In this case heading and detail bands. The heading area of the list report is defined in Band 1 in the report designer, while the detail area is designed in Band 2. On insurance claims, the top part of the insurance form is designed in Band 1, Band 2 is used to insert a blank area between the top of the form and the transaction area, Band 3 is used to design the transaction area, and Band 4 is used to design the area between the transactions and the bottom of the page. Each band's size is defined on the Bands tab in the report properties window.

Click Reports | Design Custom Reports and Bills on MediSoft's menu. When the report designer opens, click File | Open Report, then choose an insurance form format to modify. After the format opens in the report designer, click File | Report Properties, then click the Bands tab. Click the drop-down arrow to select Band 1, 2, 3 or 4. The size of the selected band is defined in the Band Height field. You can click the up and down arrows to increase or decrease the band size by quarter-inch increments, or simply type in the measurement you want.

Each Windows printer driver defines the printable area for a page. MediSoft insurance form alignment problems are caused by differences in the bottom margin settings of different printer drivers. This alignment problem may be corrected in MediSoft's Report Designer by changing the size of Band 4. Remember, Band 4 on insurance claims measures UP from the bottom of the page, while bands 1 through 3 measure DOWN from the top of the page. If the bottom area of your insurance claim is printing too low, INCREASE the size of Band 4. If the bottom area is printing too high, DECREASE the size of Band 4. You can guesstimate the amount of the change, or measure the exact space between the printing and the box that it's supposed to be printed in, then convert it to decimal format (1/8 inch equals .125 inch, for example). If you are measuring the distance directly, add or subtract the amount of the necessary change to the measurement already listed for the band size, then enter the total. Click OK, then save the changed form with a new name. Experiment! You may need to make several changes to get the desired result. Remember to make similar changes for the secondary and tertiary insurance form formats.

Insurance claims that are misaligned in other areas may be corrected by moving the affected fields in the report designer, or by changing the left and top offset in the report properties window.

For telephone technical support please call us at 888-691-8058.