

## Claim Form Alignment for the Revised CMS1500 02/12 Form

**Important:** The new CMS1500 form went into effect 4/1/2014, old versions of Medisoft will need to be upgraded. Any HCFA or CMS form created in Version 18 or older will not be usable because the required data has changed, as a result you will need to recreate all your existing forms. Choose one of the new revised forms that end in 02/12, and reformat for each claim type you need. (For example: 'CMS-1500 (Primary)–02/12' or 'CMS-1500(Secondary)–02/12'.) (If you get the error 'Field Pin Qualifier is missing or invalid' when trying to print a claim, call us for help with your practice & provider set up.)

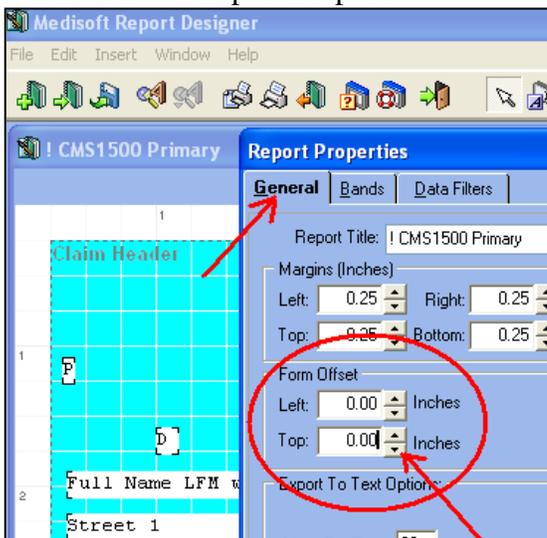
### 1. Open Your Form for Editing

Click 'Reports' 'Design Custom Reports and Bills' 'File' and 'Open Report', Then click the radio button for 'Insurance Form' and double-click on one of the new revised insurance forms to open it. (Those ending in 02/12 are the new revised forms.) Click 'File' 'Save As' and save the form with a new name each time you make a change so you always have a copy of the previous one. This ensures you have your originals in case you do not like the changes which were made.

### 2. Form Offset

Most often the whole form is out of alignment – usually the printed information is too high on your form. (If you only need to move a few individual fields, skip to Step #4)

Click 'File' 'Report Properties'



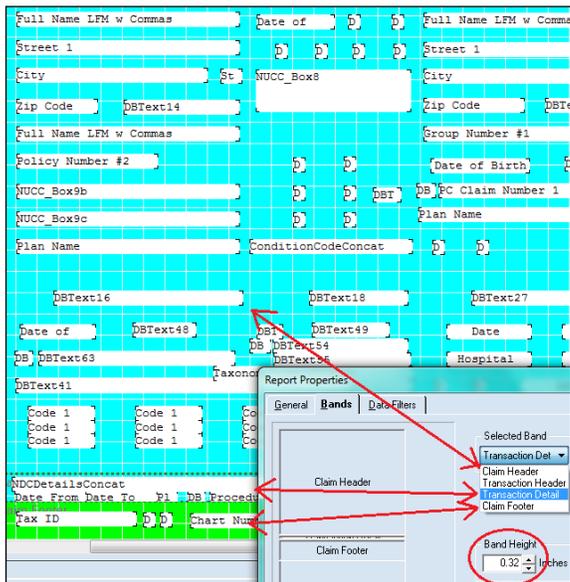
In the 'General' tab, under the 'Form offset' section you can change the left and top offsets (margins). **If your form is too far up, you will usually change the 'Top' offset from -.08 to 0.00.**

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

They are measured in hundredths of an inch, so if you increase the top offset from 0.00 to 0.25, it makes the margin larger and moves the information 1/4" (0.25 of an inch) down/lower on your form.

### 3. Bands - After the form offset is corrected



Other types of misalignment are in the Transaction Detail area (Box 24 A-J), and the Claim Footer (all information below Box 24 A-J). The transaction area may have too many or too few transactions, and/or the fields may print too high or too low. This is easily corrected by adjusting the size of the bands.

Click 'File' 'Report Properties'  
Then click on the 'Bands' tab

Explanation of the bands:

- Claim Header Band: Section of boxes 1-23, large blue & white section on top.
- Transaction Header Band is not used.
- Transaction Detail Band: Section of boxes 24 A-J, narrow blue & white section above the green band.
- Claim Footer Band: Section of boxes 25-33, green & white section at the bottom.

**Claim Header Band:** This band affects all information below it. Increasing the 'Band Height' pushes the information in boxes 24-33 down, decreasing it moves the information up. The up and down arrows increase or decrease the band size by quarter-inch increments, so for fine tuning type in the measurement you want.

**Transaction Detail Band:** Do not change the Transaction Detail band, for Version 19 it is always set to .32

**Claim Footer Band:** (Always adjust band one first because it affects information in the others.) Claim Footer Band is measured from the bottom of the form, so increasing the height moves the information in boxes 25–33 up, decreasing moves it down. Be careful changing the height of this band, so that you don't cover up the data fields in box 23 above it.

### 4. Moving Individual Fields



Most often you will only need to move a few misaligned fields individually. Select the field by left clicking on it once with your mouse, then use the arrow keys on your keyboard to move it right, left, up, or down. Each press of an arrow key moves the selected field 1/72 of an inch, so it takes about 5 clicks to move it over 1 letter.

### Printers

If you compare how different printers print the same document, you'll see subtle differences in the type, spacing and margins. Each Windows printer driver defines the printable area for a page, so if you change to 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.

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

For help from one of our technicians, please call 888-691-8058 for support pricing options.