

KnowledgeDesign Software

PatientEstimator allows you to create estimates for procedures with only a few mouse clicks, insuring that all applicable fees are included. PatientEstimator is configurable to the way you run your practice and how you wish estimates to be presented.

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Introduction

Patient Estimator is designed to allow you to easily create cost estimates which involve multiple procedures, OR costs, anesthesia costs, overnight hospital stays and other miscellaneous fees. Once you have the data entered into the database, creating an estimate is as easy as clicking which procedures will be performed. You will be able to create multiple estimates to provide your patients with cost information based on a variety of scenarios, all at the push of a button.

The Patient Estimator can produce either a concise estimate for the patient or a detailed breakout for your own use. There are a variety of print options to choose from, each of which is customizable to fit your practice.

Review the section on Getting Started to see how to setup the program to match your needs.

Getting Started

There are five basic steps to setting up Patient Estimator:

- 1. Register using Help->Register if you have purchased Patient Estimator and have received a registration key. If you do not have a key, Patient Estimator will run in trial mode and there will be restrictions (see Registration on page 7).
- 2. Set the preferences to configure how you would like the printout to look and to configure information that will allow you to email a PDF version of the estimate directly to your patient (see Printing Options on page 6). You can specify the header text, pre-boilerplate (which will be printed before the information about the procedures) and post boilerplate (which will be printed after). You can also select a default font and one of several printout formats. See Preferences on on page 4 for more details.
- 3. Use Database->Edit->Edit Fixed and Hourly to set the values for the hourly rate for anesthesia, the surgeon's time (if billing hourly rather than by the procedure), a fixed cost for anesthesia (if there is one) and the cost per night for an overnight stay in the hospital.
- 4. Use Database->Edit->Edit Misc to create miscellaneous items that either can be associated with a procedure (for example implants for a breast augmentation) or that can be selected independently of a procedure. See Miscellaneous Fees on page 5 for more information
- 5. Use Database->Edit->Edit Procedures to create procedures. See Procedures on page 5 for more information.

If you want to keep the database on your network so you can share it between different computers, see Sharing a database on page 4.

Now you're ready to create your first estimate. It could not be easier.

- 1. Enter the Patient's name
- 2. Select one or more procedures
- 3. If you want to include miscellaneous fees that were not automatically selected because of a procedure, click on them. If you want to not include a miscellaneous fee that was selected because of a procedure, just click it to deselect it.
- 4. If you wish to provide a discount (only applies to the surgeon's fee) select an entry from 5% to 50%.
- 5. Select Insurance or In Office it it applies (for how this affects the estimate, see Calculations on page 7).
- 6. If you need to add an additional fee, include this in either of the two Additional fee areas.

At this point you will have created your first estimate (if you'd like to see the ways you can modify an estimate, see Modifying an Estimate on page 7).

If you just want to print the estimate, use File->Print Estimate->Quick Print (or Ctrl-P), or you can use Print Preview or Print to specify printer information (see Printing Options on page 6 for more details) or create a PDF file and email it to your patient (see Emailing on page 6).

Main Screen

On the main screen you can specify the Patient's name, select which procedures you would like to create an estimate for, set a discount percentage (applied only to the surgeon's fees), select whether or not this is being covered by insurance, whether it is being performed in your office, select additional miscellaneous fees, modify the total number of hours of anesthesia and add additional fees.

As you modify the items on the screen, the estimate details will be displayed. For how the calculations are made, see Calculations on page 7.

File Menu

File->New Estimate

Creates a new, blank, estimate.

File->Modify Estimate

Allows you to modify any of the charges for an estimate (see Modifying an Estimate on page 7)

File->Print Estimate

After you have created an estimate, this will print it. You can preview it, print it, or email a PDF copy (see Emailing on page 6).

File->Print Detailed

This prints out the detailed information about the estimate (using a similar format to the Detailed option in Printing Options, but without the text blocks). You can use this to verify that all the charges are correct before presenting an estimate to the patient. You have the same options as you do with Print Estimate, print preview, print or email.

File->Export

Use this option to export the information that would be printed out to a file. You can then open this file in your word processor and do any formatting that is not supported by Patient Estimator. You can export either the information that would be printed in the estimate, or the detailed information.

Database Menu

Database->Open

Opens an existing database. Patient Evaluator will remember the database that was open the last time it was used and open that database automatically. You would only need to use this if you kept multiple databases and wanted to switch between them.

Database->Create

Creates a new, empty database.

<u>Database->Print</u>

Will print out all the database information, procedures, miscellaneous fees and fixed and hourly fees.

Database->Edit

This brings up a screen that allows you to edit all the database values. If you are sharing a database between multiple computers (see Sharing a database on page 4) you will be informed if another system has made changes since you started and you will need to reenter your changes.

Database->Edit->Save

Save any modifications you have made to the current database. These changes are automatically saved when you exit Patient Evaluator, but you can use this option to save them in the middle of a session. If you are doing extensive modifications to the database, it would be wise to save periodically in case of system failure.

Database->Edit->Save As

Allows you to save the database under a new name/location.

Database->Edit->Edit Procedures

You can either edit an existing procedure, delete one or create a new one.

To delete a procedure, click on the box to the left of the procedure name to select the entire row, and then hit the delete key.

Database->Edit->Edit Misc

You can either edit an existing miscellaneous fee, delete one or create new ones.

Database->Edit->Edit Fixed and Hourly

Each of the fixed (Anesthesia fixed cost or overnight stay rate) and hourly (surgeon's and anesthesia) rates can be set.

Preferences

Here you can configure how your estimate will be displayed as well as information that will allow you to email a PDF of your estimate directly to a patient.

- Default font this font will be used for the body of the estimate
- Edit Header Text / Pre Boilerplate / Post Boilerplate You can select fonts, included bulleted lists and center text in each of these areas (use the right mouse button to select what action to perform). In the Header Text you can use <patient> and <date> which will be replaced by the patient's name and the current date when the estimate is generated.
- Date Format
- Print format (see Printing Options on page 6)
- SMTP Server this is your email server and is only used if you email estimates to patients
- PDF Printer this is a printer driver on your system that will create a PDF file instead of actually printing to a printer (see Emailing on page 6). This is only used if you email estimates to patients
- PDF Filename If you always create the PDF file in the same directory with the same name, setting it here will prevent PatientEstimator from asking for it when you email.

Sharing a Database

If you want to run Patient Estimator on more than one computer in your practice, you will usually want to share the database so that when you make changes on one, it will be reflected on the other systems. This is not required, so if you would like to be able to use different pricing on different systems, the default installation will provide this.

If you do want to share your database, all you need to do is put the database on a system that is visible on your network (you can do this by using the Database->Edit->Save As feature to write the database to a network location) and then on any of your other computers, use Database->Open to open that database. When you shut down Patient Estimator it will remember the database it was using and use that database from then on (unless another Database->Open is done to a different database).

In order to prevent multiple systems from overwriting changes another system has made, if you attempt to save changes after another system has made changes (and you have started) then you will be notified of this and you will need to redo your changes.

Procedures

Procedures drive the estimation process. The characteristics of a procedure are:

- Description
- Surgeon's fee if this is * it means that the surgeon's fee is billed on an hourly basis. When you select a procedure with this type of fee, you will be prompted for the number of hours it will take.
- OR Primary/Secondary The OR fee. Whether the Primary or Secondary is charged depends on several factors. See calculations on page 7.
- Hours of Anesthesia this can also be * for an hourly rate. If both surgeon's fee and anesthesia are hourly, the same number of hours will be used for both.
- Overnight stay How many nights will be required in the hospital.
- Misc Fees The misc fees that are always associated with this procedure. If it is only associated some of the time, you can add this on the main screen after selecting the procedure. For Miscellaneous Fee characteristics see Miscellaneous Fees below.

Miscellaneous Fees

Miscellaneous fees can be associated with Procedures or can be added directly. Their characteristics are:

- Description
- Fee
- Hourly If this is checked the fee is based on an hourly rate and when you select either a
 procedure that has this associated with it or when you select it directly you will be asked for
 the number of hours. If you select multiple procedures which have it associated, you will
 need to enter the total number of hours for all procedures.
- Display this can be one of three values
 - Surgeon This is included in the procedures section, or rolled into this section depending on the Printing Options used.
 - Display This is always displayed in the procedures section. If you are using the rollup printing option, it will be displayed but the fee will not be.
 - OR This is included in the Surgery Center Fee.
- Necessary If one of the procedures in the estimate is covered by Insurance, necessary miscellaneous fee's are not charged.

Printing Options

Patient Estimator gives you a variety of options to tailor your printed estimates. The estimate is broken down into four sections:

- 1. Header
- 2. Pre Boilerplate
- 3. Estimate
- 4. Post Boilerplate

Use the Preferences menu to modify this information. You can set the default font, format how the date will be formatted, select from a variety of different formats for printing the actual estimate information and edit the three text blocks: header, pre boilerplate and post boilerplate.

You can select text in any of the three text sections and change the font, the alignment or create a bullet list. In the header section you can use <date> or <patient> to insert the date or patient name anywhere in the header text.

There are three predefined formats for the estimate section of the printout:

Procedure Roll-up

This rolls up all the charges into a single charge. Each procedure is named separately, but only one charge, the total for all charges, is listed.

Line Item

This lists all procedures as in the Procedure Roll-up, but OR fees, charges for overnight stays and anesthesia fees are not included. A separate line item is listed for OR fees (which includes the overnight stay) and for anesthesia.

Detailed

In this printout each line item is broken out separately.

Emailing Estimates

If you would prefer to email your patient a PDF file of the estimate, you will need to have a PDF printer driver installed. A usefull, free PDF printer driver is Bullzip. It has the useful feature of allowing you to configure it such that it always uses the same file. This allows you to setup PatientEstimator (see Preferences on page 4) so that you will not need to specify a filename when using this option (this presumes that you will not want to save the PDF files with the estimates).

You will need to know the name of your PDF printer driver and the name of your email server (known as your SMTP Server). These are specified in Preferences.

Modifying an Estimate

After you have created an estimate, you can use this option to change any of the charges associated with it. It will list all selected procedures with their respective charges and selected miscellaneous fees. You can change any of the charges associated with a procedure or miscellaneous fee, or deselect any selected miscellaneous fees. These changes do not affect the database, merely this estimate.

Registration

Unregistered copies of Patient Estimator are limited:

- You can not print (but you can see what it would look like with Print Preview)
- You cannot save changes to the database
- You cannot open a database with non-zero data

When you purchase Patient Estimator you will be given a user name (which will print at the top of all estimates) and a registration key. Use Help->Register to enter this information. It must be entered exactly (it is case sensitive, so A is not the same as a). Once registered all restrictions will be removed.

Calculations

The calculations used to determine the estimate are:

- · Discount % applies only to the surgeon's fees
- Multiple procedures
 - The procedure with the largest OR Primary fee has that fee used for it's OR fee, and the secondary OR fee is used for any additional procedures.
 - If a misc fee is included in multiple procedures, it is only billed once
 - Fixed anesthesia cost is only included once
 - The maximum number of overnight stays is used (they are not additive)
- Insurance
 - All OR fees are charged at the Secondary rate
 - The fixed anesthesia fee is not charged.
 - The number of nights in the hospital is reduced by 1
 - Any miscellaneous fee that is marked as necessary is not included in the estimate
- In Office
 - No OR, anesthesia or Overnight stay fees are included