



AltaPoint Palm Sync 4.0 - Documentation

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# Palm Documentation for Version 4.0

## AltaPoint Medical for the Palm Organizer

### Please Read This First!

This manual contains important information that can greatly enhance your success in the preparation, installation, and use of AltaPoint Medical Palm synchronization utilities. This section is not long – **PLEASE TAKE THE TIME TO READ IT IN ITS ENTIRETY BEFORE PROCEEDING.**

### System Requirements

AltaPoint Medical for the Palm requires a Palm device (purchased separately) running PalmOS version 3.0 or later. The AltaPoint Synchronization Utilities require: 1) a desktop computer running Windows 95, 98, 2000, NT or XP; and 2) an authorized version of AltaPoint Medical.

**NOTE:**

You will also need to purchase an Activation Key for each provider/user who plans to synchronize a Palm device to the AltaPoint program. This Activation Key is based on the Provider Code, created by you, in the AltaPoint desktop software. AltaPoint cannot provide you with an Activation Key, for your Palm device, until you have set this up in your desktop software. Call your local reseller or AltaPoint at (888)258-2552 to attain your Activation Key(s).

### Introduction

The AltaPoint Synchronization Utilities are designed to facilitate the transfer and sharing of data between your AltaPoint Medical program on your desktop computer and the AltaPoint Medical Synchronization Utilities program on your Palm. The information that you can share between your program and Palm device include:

- Patient Information
- Appointments
- Procedure Codes
- Diagnosis Codes
- Patient Billing
- Patient Notes

The data recorded in your AltaPoint Palm program is said to be “synchronized” with the data in the desktop because information can be entered and edited independently and periodically synchronized – allowing all entries and updates to be recorded both on your desktop computer and your Palm device. (The only exception to this is new invoice information, which only goes one way from the Palm to the desktop.)

# Installing AltaPoint for the Palm Organizer

1. Make sure your Palm device is already installed and working properly before installing the AltaPoint Palm portion.
2. Locate and run the AltaPalm.exe file on your computer's hard drive. (This file was placed on your computer when you installed the main AltaPoint program.)
3. Reboot your computer.
4. Install the AltaMed.prc on your Palm device.
5. Enter your User Information, as given to you by AltaPoint, into the AltaPoint program on the Palm.

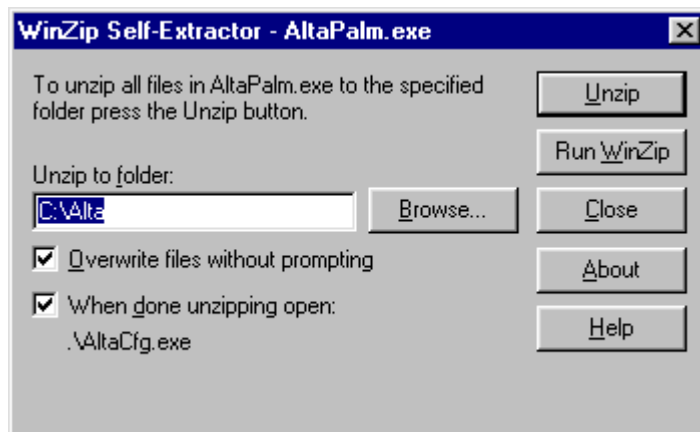
## 1. Install the Palm device on your computer

Follow the instructions given to you by the Palm device manufacturer.

## 2. Locate and run the AltaPalm.exe file on your computer's hard drive.

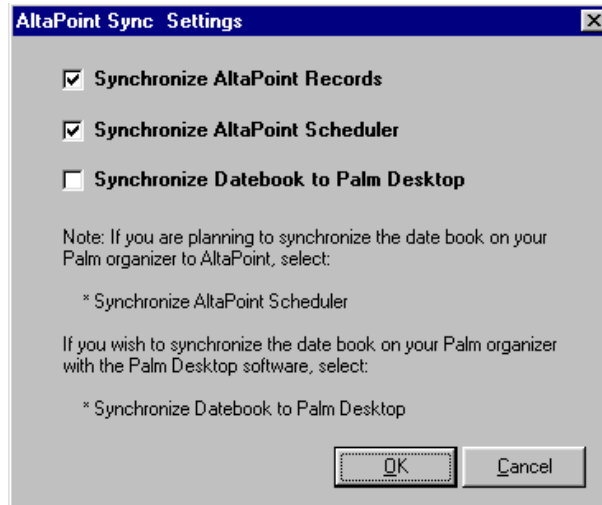
This file is most likely in your C:\Alta folder. If it is not you can click on your start button then select "Find Files and Folders." In the named box, type "AltaPalm.exe" and click the "Find Now" button. Once the file is located, double click on the file name to execute (run) the file.

When you run the "AltaPalm.exe" file, you will see the following screen:

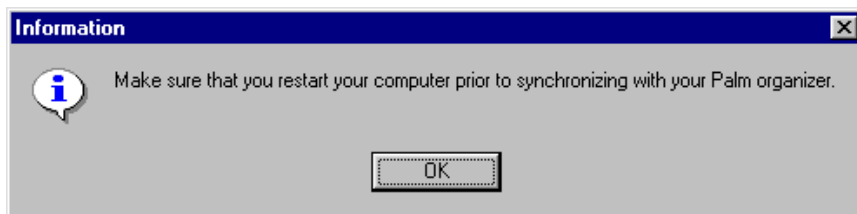


Press the "Unzip" button unless you wish to change the default directory to something other than C:\Alta.

Once you have pressed the "Unzip" button you will be told that a number of files were successfully unzipped. Press the "OK" button. You will receive the following screen:



Most people will want to select the first two checkboxes. If you wish to synchronize your Palm device with Palm's scheduler instead of AltaPoint's scheduler, you will want to select the 1<sup>st</sup> and 3<sup>rd</sup> checkboxes. Unfortunately, the Palm device is not capable of syncing with more than one schedule. This step modifies your Windows Registry pertaining to the Palm synchronization. Make your selection and press the OK button. The following screen will be displayed:



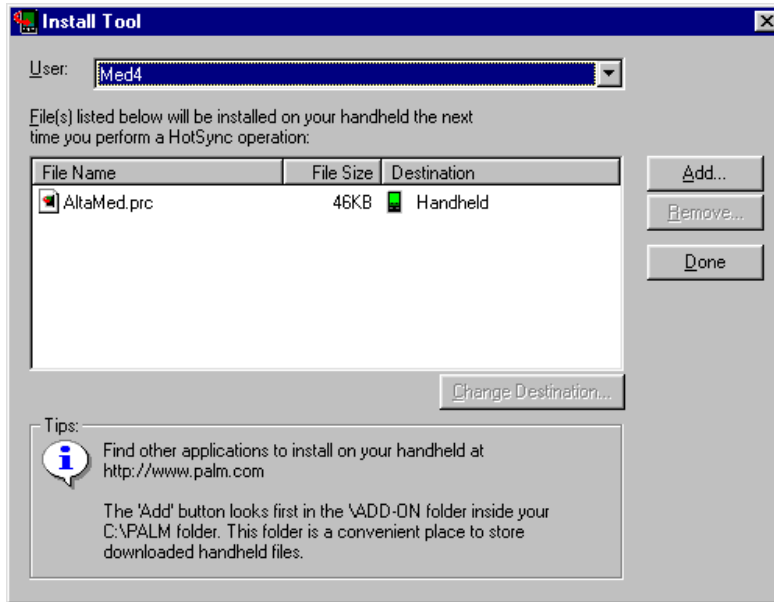
Press OK to remove the message from your screen.

- 3. Now is the time to reboot your computer so that the new changes will take place on your desktop computer.**

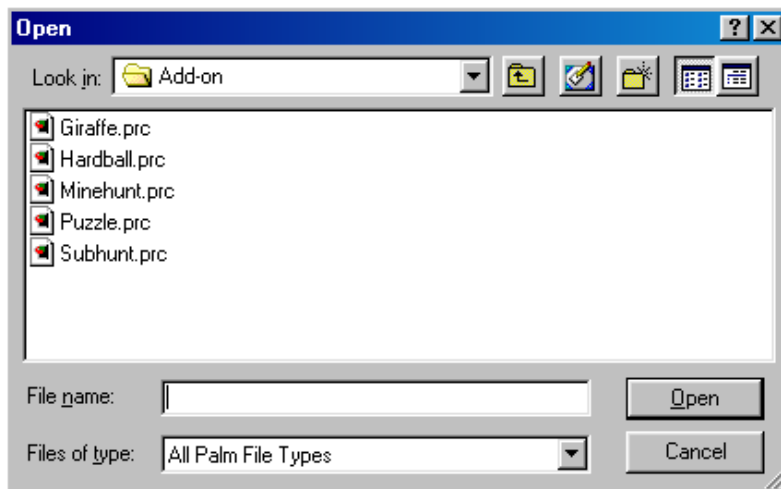
#### 4. Install the AltaMed.prc on your Palm device.

Your Palm device software should have come with a computer desktop utility to help you install programs onto your Palm device. In most cases they call it the “Install Tool.” Find this utility and start it. (Consult your Palm manual if you have trouble finding it.)

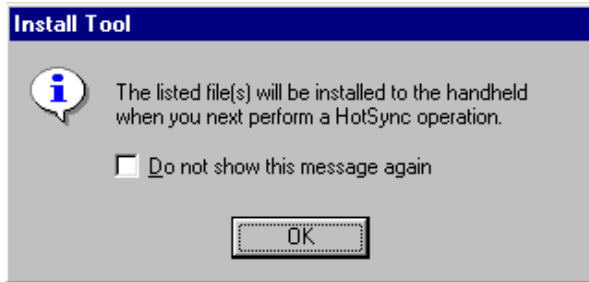
Once you find and run the Install Tool, you will see a screen that looks similar to the screen below:



The Install Tool will ask you to select a user (already setup when the Palm device was originally installed.) Select a user, then select the “Add” button to the right. The following screen will appear:



You will need to locate the file “AltaMed.prc.” This file is generally located in the C:\Alta folder if the default settings were used in step #2 above. You will need to click the down-arrow at the end of the “Look in:” box above to select the C:\Alta folder (or the folder you selected when extracting the AltaPalm.exe file in step #2 above.) Once you have located the AltaMed.prc file, highlight it and select the “Open” button at the bottom of the screen. The AltaMed.prc file will appear in the window as illustrated on the Install Tool screen above. Press the ”Done” button to complete the selection. You will then see the following screen:



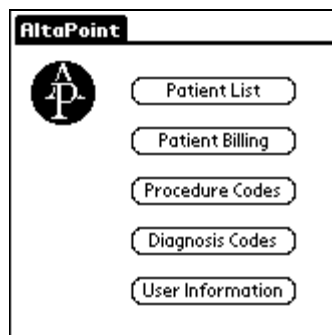
As described above, the AltaPalm application will be installed on your Palm device when you next “HotSync.”

**Perform a hotsync to allow the install tool to install the AltaPoint program on your Palm device.**

**5. Enter your User Information, as given to you by AltaPoint, into the AltaPoint program on the Palm.**

After performing the hotsync that installs the AltaPoint program on the Palm device, you will need to enter your Serial Number and Activation Key as given to you by AltaPoint Data Systems.

- A. Turn on your Palm device and select the Applications button.
- B. The AltaPoint program icon should appear with the other applications installed on your Palm.
- C. Select AltaPoint. The AltaPoint main menu screen will be displayed:



- D. Select the User Information button. The following screen will be displayed.

The screenshot shows a dialog box titled "Provider Information". It contains the following fields and controls:

- Provider Name: \_\_\_\_\_
- Serial Number: \_\_\_\_\_
- Activation Key: \_\_\_\_\_
- Provider Code: \_\_\_\_\_
- Location: \_\_\_\_\_
- Auto Chart No.'s
- Next Chart#: \_\_\_\_\_
- Buttons: OK, Cancel
- Upward arrow icon

The following provides a description of each field contained in the Provider Information screen.

### Provider Name, Serial Number, Activation Key

**Enter the provider name, program serial number and activation key EXACTLY as they appear on your original product invoice that accompanied your AltaPoint program. If you have lost your invoice, you can contact AltaPoint to obtain a new activation key by calling (888)258-2552.**

### Provider Code

Enter the provider code you use to identify yourself in the AltaPoint Medical program. **(Your AltaPoint Activation Key is specific to your provider code and will not work if entered incorrectly.)**

### Location

Enter the default location code you would like to use when entering patient encounters and other charges. This code corresponds to the location code you use when entering charges and payments in AltaPoint Medical. This code will be used as a default value when creating charges in AltaPoint but may be overridden as you enter new patient encounters.

### Auto Chart No.'s

Check this box if you would like AltaPoint to automatically number new patients that you enter from AltaPoint onto your Palm device. Checking this field assumes that you use a sequential numbering system to identify your patients. (See Note marked **"Important"** below.)

### Next Chart #

If you have selected the Auto Chart No.'s checkbox above, use this field to indicate the next patient number to use for new patients. As each new patient is entered into AltaPoint, this field will be incremented automatically by one.

After entering the appropriate information in the fields provided, select the OK button to return to the AltaPoint Palm main menu.

## Important: Using AltaPoint to Add Patients on the Palm

Please keep in mind that the AltaPoint Medical desktop patient records you select to synchronize with the Palm will automatically appear on your Palm device the first time synchronize the two programs. It is therefore not a necessity to create patient records on the Palm. AltaPoint does however provide you with

the ability to add new patients -- which in turn will transfer to the desktop the next time you synchronize. This can be a very convenient and powerful feature if you remember a few important guidelines.

The most important consideration when creating a new patient in AltaPoint is to insure that the chart number you assign the new patient has not already been assigned to another patient by your office staff. The "Auto Chart #:" feature can help you avoid this problem. The Auto Chart feature will create patient codes in the following format "AAAA-00000." For example, if you enter the number "1" as the "Next Chart #:" in the "User Information" section then create a new patient by the name "George Shelby" (leaving the "Chart:" field blank), the resulting chart # that would be created is SHEL-00001. As you can see, the Auto Chart feature uses the first four letters of the last name, then a hyphen, then a sequence of zeros and the number specified in "Next Chart #" field. This format is different than that used by the desktop program in that you cannot use a hyphen character in the Code field. This is by design so that the palm records never attempt to duplicate those on the desktop and secondly so that you can identify records created originally on the palm.

**IMPORTANT NOTE:**

Once you begin using the palm with the Auto Chart feature, your desktop will also use this type of auto-numbering scheme. The only difference is that the desktop patient code will not have a Hyphen in the number. E.g. "AAAA00000"

## **More than 1 physician planning to Sync to AltaPoint?**

Another consideration you should make when more than one physician will be synchronizing a palm device to the main AltaPoint database is to predefine a block of numbers for each physician to use when creating new patient records. For example you may have physician #1 start with the "Next Chart #:" at 1, then have physician #2 start his/her numbering at 5000. Using this strategy physician #1 would likely never run into physician #2's numbers. You can set aside a block of numbers any way you wish.

**NOTE:**

Each physician will require a distinct Serial Number and Activation Key purchased from AltaPoint to be able to sync to the AltaPoint program. To receive a Serial Number and Activation Key, call your local reseller or call AltaPoint at (888)258-2552.

## **Special Multi-Provider/Multi-Palm Considerations**

If you have more than one provider in your office, AltaPoint allows you to synchronize more than one Palm device to a single installation of AltaPoint Medical -- provided that the following conditions are met:

1. Always remember to specify your unique provider code when using AltaPoint's synchronization utility. This will insure that only the desktop records for provider specified will be synchronized with the Palm.
2. If you choose to synchronize your desktop appointments with the Palm, always check the Appointments tab to make sure that your schedule is selected when creating the synchronization file.
3. Only synchronize your procedure codes and diagnosis codes once to set up these codes on your Palm for the first time. Thereafter always check to make sure that the Procedure Codes and Diagnosis Codes are unchecked when you create and post your synchronization file. This is necessary because procedure and diagnosis codes (unlike patients, appointments, and billing) are

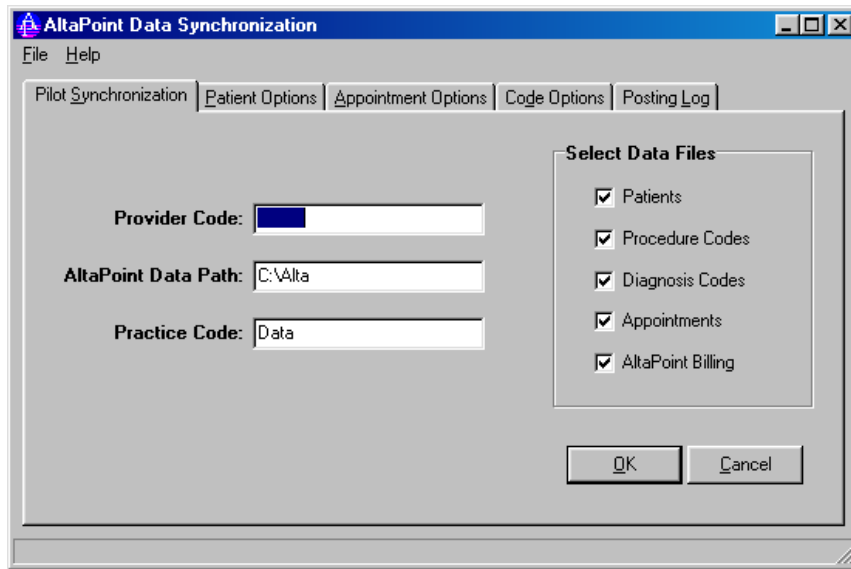
shared among all providers in AltaPoint Medical. Because of this, procedure and diagnosis codes cannot be filtered out by provider. Synchronizing these records more than once to more than one Palm device could create duplicate records on the Palm.

# Using AltaPoint Medical for the Palm Organizer

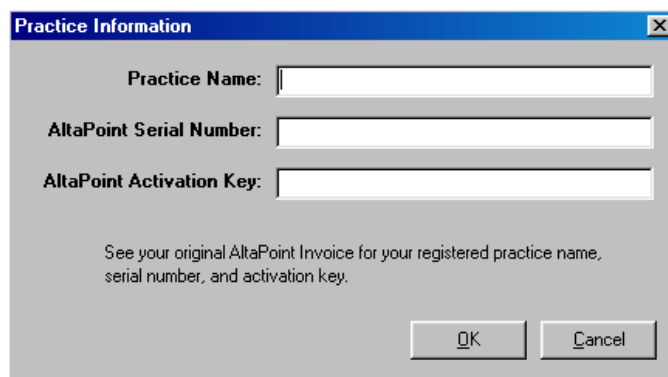
Before performing a HotSync you must close AltaPoint Medical on the desktop computer you are using.

## The AltaPoint Data Synchronization Screen

After following the installation instructions previously described, the first time you HotSync (and every time thereafter) you will encounter the “AltaPoint Data Synchronization” Displayed below:



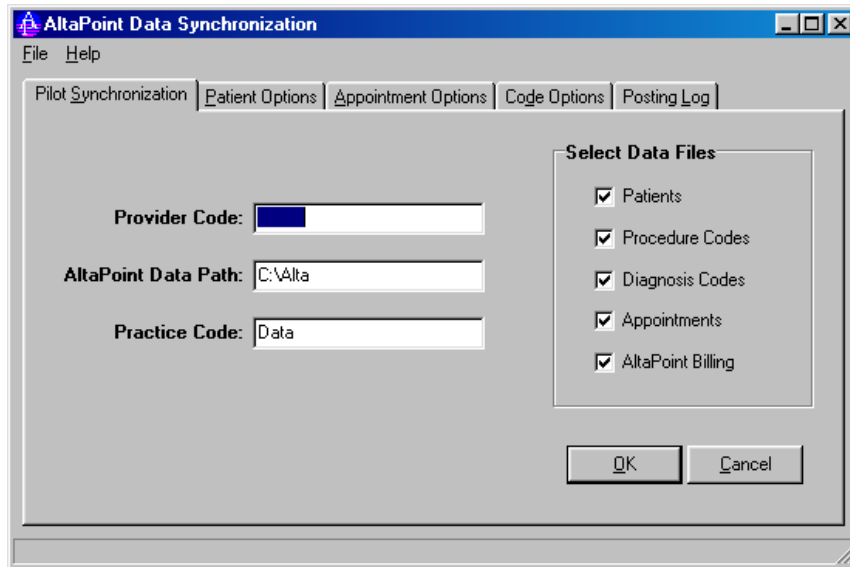
From this screen you must enter your valid Provider Code as set up in the AltaPoint desktop program. Then, select the “Practice Information” option from the “File” menu item above. You will see the following screen:



Enter your Practice Name, Serial Number and Activation Key as given to you from AltaPoint. You should only need to enter this information once.

**Important! This Activation Key is different than the one on your desktop and is specific to the Palm User identified by the Provider Code. The Palm portion of AltaPoint is an option and is sold separately.**

Each time you synchronize your Palm device you will be shown the “AltaPoint Data Synchronization” screen illustrated again below:



**NOTE:**

**You must enter the path to your AltaPoint data files (in most cases this will be C:\alta.) Then identify the Practice Code. This will usually be the word “Data” unless you are using demo data or have created a new practice, in which case the Practice Code is the name you gave that new practice when you created it.**

A synchronization file is created from the information you provide on this screen. This temporary file is used to filter the vast amount of data stored in your AltaPoint Medical data files -- sharing only that information you would like stored on your Palm device. This temporary file also provides an added measure of security to insure that AltaPoint Medical is updated with data from your Palm only after this data has passed a number of tests for validity.

Begin by selecting the kind and range of AltaPoint Medical information you would like to share with the Palm. Place a check next to the data files you would like to synchronize with the Palm device including: Patients; Procedure Codes; Diagnosis Codes; Appointments and Billing Information.

Because of the limited storage capacity of many Palm devices, you should use some care to limit the data synchronized with AltaPoint. For example, if you have several years of patient history stored in AltaPoint Medical, you may wish to limit the patients synchronized to the Palm to only those patients that you have seen in the last 18 months. You can do this selecting the Patient Options tab and entering the appropriate date in the Date Last Active field shown on this tab.

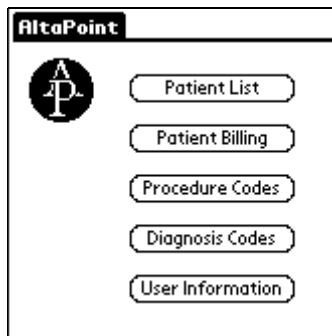
As another example, there is little value in storing past patient appointments in AltaPoint on the Palm. Select the Appointment Options tab to limit the patient appointments in AltaPoint Medical synchronized to AltaPoint by entering the desired range of dates in the fields provided.

Once you have selected the desired data files and ranges of records to synchronize, select OK button. All settings select by you on this form will be saved for the next time you synchronize with AltaPoint.

## Using AltaPoint Medical on the Palm

Follow these steps to run AltaPoint Medical on your Palm device.

1. Turn on your Palm device and select the Applications button.
2. The AltaPoint program and icon should appear with the other applications installed on your Palm.
3. Select AltaPoint. The AltaPoint main menu screen will be displayed:



## Locating Patients, Procedure & Diagnosis Codes

### Locating Patients

From the AltaPoint main menu, select the Patient List button.

The patient list will either be sorted by chart number or by patient name (last, first, middle). You can quickly find a patient record by entering the patients chart number or name (depending on how the list is sorted) in the field labeled Find, and selecting the Go button. You can change the way the patient list is sorted (by name or by chart number) by selecting the Menu button on the Palm. Once a sorting method has been selected, AltaPoint will maintain the patient list in the order chosen.

### Viewing and Editing Patients

Once you have found the desired patient record in the patient list, you can view or edit the patient's information by:

1. Selecting the record from the list with your stylus (the special Palm device pen). This will highlight the record in the patient list.

2. Select the Edit Button. The following screen will be displayed:

**Edit Patient**

Chart: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
First Name, I.: \_\_\_\_\_  
Address 1: \_\_\_\_\_  
Address 2: \_\_\_\_\_  
City: \_\_\_\_\_  
State/ZIP: \_\_\_\_\_  
Home Phone: \_\_\_\_\_  
Work Phone: \_\_\_\_\_

OK Cancel Delete Page 2 Notes

3. Select the OK button to save the changes made to the patient record or Cancel to discard any changes.
4. From the Patient List screen select the OK button to return to the AltaPoint main menu.

**NOTE:**

The notes entered using the **Notes** button on this screen corresponds with the “Narrative Notes” section of the Patient File on your AltaPoint desktop.

### Locating Procedure and Diagnosis Codes

From the AltaPoint main menu, select the either the Procedure or Diagnosis List Buttons.

The code list will either be sorted by code or by description. You can quickly find a procedure code by entering the code or description (depending on how the list is sorted) in the field labeled Find, and selecting the Go button. You can change the way the code list is sorted (by code or by description) by selecting the Menu button on the Palm. Once a sorting method has been selected, AltaPoint will maintain the code list in the order chosen. Note that the chosen method of sorting patients, procedure codes, and diagnosis codes vary.

### Viewing and Editing a Code

Once you have found the desired procedure or diagnosis in its respective list, you can view or edit the code detail by:

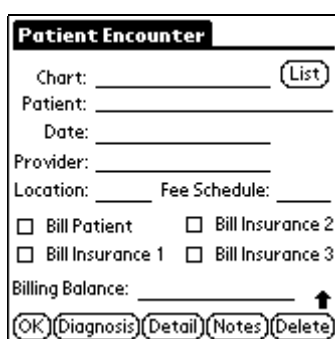
1. Selecting the record from the list with your stylus (the special Palm device pen). This will highlight the record in the code list.
2. Select the Edit Button.
3. Select the OK button to save the changes made to the patient record or Cancel to discard any changes.
4. From the Patient List screen select the OK button to return to the AltaPoint main menu.

## Entering Patient Encounters, Charges, and Payments

With the Palm you can record patient encounters, procedures, diagnoses, notes, and payments. Unlike other AltaPoint records that synchronize with the desktop (patients, procedure code, diagnosis codes, and appointments), **billing information entered on the Palm is only transferred one-way to the AltaPoint desktop.**

Once a bill has been successfully posted to the desktop it will be deleted from the Palm. Posted bills may however, be edited in the desktop.

To create a new bill in AltaPoint, select the Patient Billing button on the main menu. The following screen will be displayed:



The following is a detailed description of each field contained on the Patient Encounter screen.

### Chart

This is the chart number of the patient for whom the bill is being created. We suggest you use the List button displayed to the right of this field to locate and select the appropriate patient.

### Patient

If you used the List button to select the desired patient for this bill, this field will automatically display the patient name.

### Date

This field will automatically display today's date in the format of MM/DD/YYYY. You can override this date if desired.

### Provider

Enter your provider code. If you entered your provider code in the User Information form of AltaPoint, your provider code will be automatically displayed in this field.

### Location

Enter the location code for this bill. If you entered a default location code in the User Information form of AltaPoint, the location code will be automatically displayed in this field.

## Fee Schedule

If you used the List button to select the desired patient for this bill, the patient's assigned fee schedule will be automatically displayed in this field.

## Bill Patient

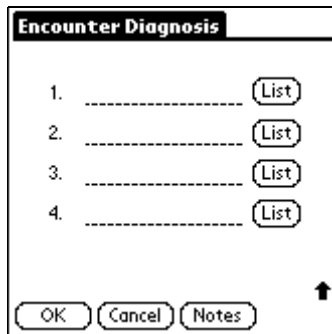
This checkbox will always be checked for new billings. This field corresponds to the Bill Patient setting in the AltaPoint desktop program.

## Bill Insurance 1-3

These checkboxes will always be unchecked for new billings. These fields correspond to the Bill Insurance settings in the AltaPoint desktop program. Check the appropriate boxes for AltaPoint Medical to bill in the Patient's: 1) Primary Insurance; 2) Secondary Insurance; and 3) Tertiary Insurance.

## Entering a Diagnosis

Select the Diagnosis button to enter a diagnosis for this bill. The following screen will be displayed:



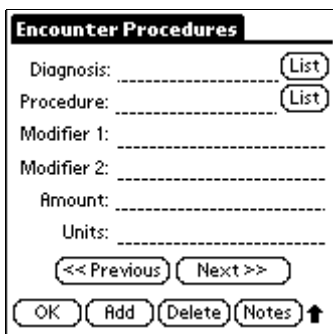
The screenshot shows a dialog box titled "Encounter Diagnosis". It contains four numbered rows, each with a dashed line for text entry and a "List" button to its right. At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Notes", followed by a small upward-pointing arrow icon.

You can enter up to 4 different diagnosis codes for each bill. Select the List button to locate and select the desired diagnosis codes. If you would like to add notes that will become part of the patient's record in the desktop, select the Narrative button.

After you have entered the diagnosis, select the OK button to return to the Patient Encounter screen.

## Entering Procedures and Payments

From the Patient Encounter screen, select the Detail button to enter procedures and payments. The following screen will appear:



The screenshot shows a window titled "Encounter Procedures". It contains the following fields and buttons:

- Diagnosis: \_\_\_\_\_ (List)
- Procedure: \_\_\_\_\_ (List)
- Modifier 1: \_\_\_\_\_
- Modifier 2: \_\_\_\_\_
- Amount: \_\_\_\_\_
- Units: \_\_\_\_\_
- Navigation buttons: << Previous, Next >>
- Action buttons: OK, Add, Delete, Notes ↑

The following is a detailed description of each of field contained on Encounter Procedures screen.

### Diagnosis

This field will default to ALL – meaning that the procedure entered relates to all diagnoses associated with this bill. Select the List button to relate this procedure to select diagnosis codes entered with this bill.

### Procedure

Select the List button to locate and select the appropriate procedure code for this billing item.

### Modifier 1-2

Enter an appropriate modifier code if required by the patient’s insurance company.

### Amount

Enter the charge or payment amount for this billing item. If this is a payment, make sure you include a minus sign ‘-’ before the amount entered. For procedures, this field will default to the amount specified under the procedure code detail for the patients fee schedule.

### Units

This field will default to one ‘1’, but may be overridden to reflect the desired units relating to this billing item.

### NOTE:

From the **Notes** button on this screen, you may enter notes for **each individual billing item**. The notes entered here correspond to the note field available for each transaction detail record of the billing file on the desktop.

To add another procedure or payment to this bill, select the Add button. You can have up to 12 line items per bill.

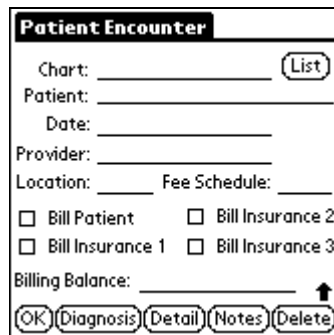
Use the Previous and Next buttons to move between line items.

Select the Delete button to select line item displayed from the current bill.

Select the OK button when finished. You will return to the Patient Encounter screen of the current bill.

## Entering Patient Notes on the Patient Encounter screen

You can enter detailed narrative text as part of each patient encounter. This is different from the note explained directly above. The note field above is designed to pertain to the specific billing line item and will appear with the billing information. This note field is more of an encounter note and will appear in the patient's file under Patient History notes. These notes are date and time stamped for accurate retrieval later. To enter notes as part of this bill, select the button from the encounter screen **(Notes)** that looks like the screen below:



The screenshot shows a form titled "Patient Encounter". It contains the following fields and controls:

- Chart: \_\_\_\_\_ (List)
- Patient: \_\_\_\_\_
- Date: \_\_\_\_\_
- Provider: \_\_\_\_\_
- Location: \_\_\_\_\_ Fee Schedule: \_\_\_\_\_
- Bill Patient       Bill Insurance 2
- Bill Insurance 1       Bill Insurance 3
- Billing Balance: \_\_\_\_\_ ↑
- Buttons: (OK) (Diagnosis) (Detail) (Notes) (Delete)

Again, the text entered in the Notes button from this screen will be added to the discrete patient notes in the Patient History section of the Notes screen in the Patient file on the desktop.

After entering the desired text in the Patient Notes screen, select the OK button to return to the Patient Encounter screen of the current bill.

Press the OK button on the Patient Encounter when done entering the current bill.

### Important Note:

You can enter notes for a given patient without creating a billing record in the desktop program. You can do this by simply creating a bill in the Palm that contains notes but no procedure or payment detail.