



# Quick Start Guide

## Hardware Requirements

Please contact our support department if you have any questions.

Computer	Minimum	Better	Best
CPU Speed	500mhz	1.0ghz	2.0ghz
Hard Drive capacity	5 gigabytes	20 gigabytes	40 gigabytes
System Memory	256megabytes	512megabytes	512megabytes
Monitor [resolution at least 1024X768]	15" SVGA	17" SVGA	17" LCD
CD-ROM Drive or DVD Drive	Required	Required	Required

Printer Options	
DYMO Label Printer	Required if you plan to print single feed labels. Also used in POMIS for printing Appt Slips and School/Work Excuses in the Scheduler.
Inkjet Printer	Acceptable, however in the long run it may cost more than a laser printer since it generally uses more ink.
Laser Printer	A laser printer is your best bet. They print faster and cheaper than all other types of printers. Works best for recall cards and batch printing forms.
Color Laser Printer	This is your best option. You get the speed and quality of a laser printer with the ability to print in color.

Networking Options	
[only necessary if you connect more than 1 machine to POMIS]	
Server Type	Peer to Peer or Dedicated server is acceptable. Windows 2000, XP or Vista suggested for Server.
Workstations	Can be Windows98/Me 2000, XP or Vista
Network Type	Cat 5 10/100 Networks or higher suggested.
Network Cards	Don't buy cheap network cards! They will cause data corruption. D-Link, Linksys, and 3Com are all good cards.

Use this handy Guide along with the POMIS Trial CD to enter your first patient, charges and print your first CMS form; as well as giving you an overview of options for processing claims, posting payments, printing reports, scheduling patients and more.

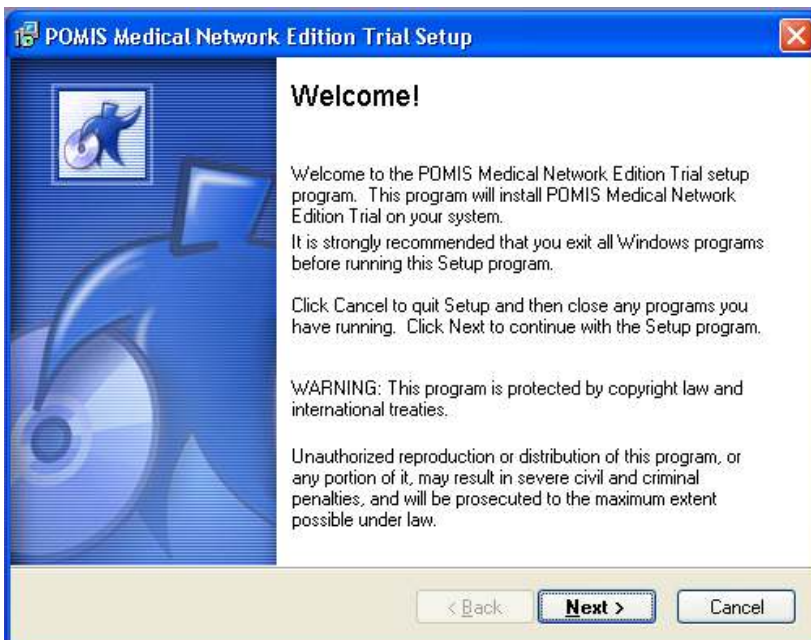
---

## INSTALLATION

Installation is easy. Simply place the CD into your CD drive for automatic installation. If installation is not automatic, follow the instructions below.

- Double Click **My Computer** on your desktop
- Double Click on the **CD drive**
- Double Click on **Setup.exe**

Once the installation starts you will see a screen similar to the one below.




Choose **Next** to Continue. Accepting all of the default installation options is fine.

When it is complete, there will be a program group called POMIS on your Start Menu. This is where you will find the program icons. There will also be **two icons on your desktop**, one for the **POMIS** program, and one for the **POMIS Scheduler**.



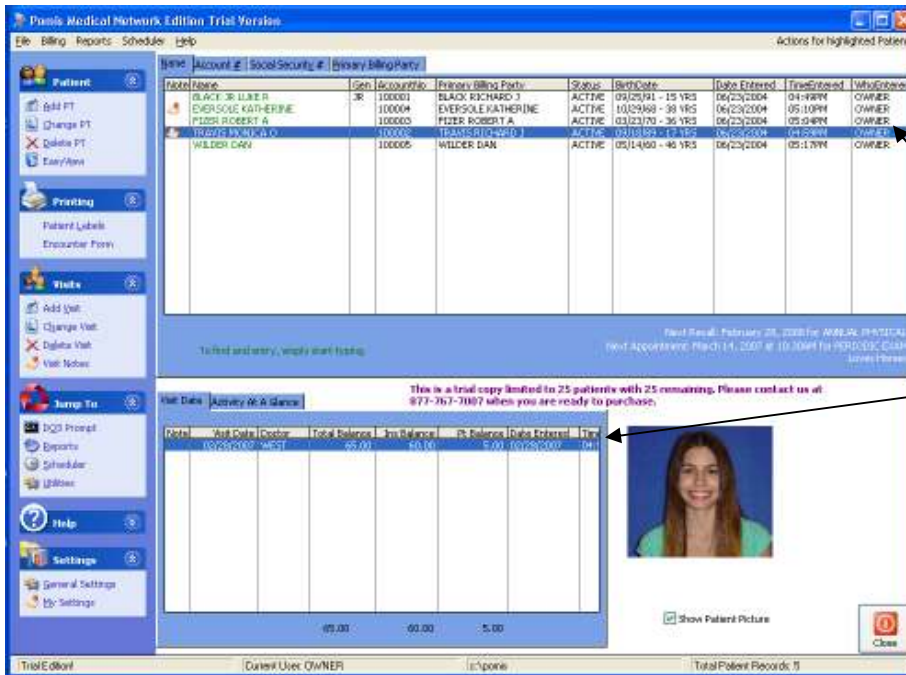
**Congratulations!** Now that you have installed POMIS you may proceed through the Quick Start Guide to try some basic functions of the program. Double Click the POMIS Medical icon to begin.

Once in POMIS, almost all of your defaults point to the most common settings. Just add doctor information and you're ready to go...

- In the **Task Pane** to the left of main screen under Settings - Click on **General Settings**.
- Click **Doctors** and click **Insert**
- Enter your provider information and click **OK** to save your work, then click **Close** to exit out of the doctor list.
- Now click on **Administration** on the left side of the screen under Master Lists; click on the look up folder  to the right of **Default Treating Doctor** and **Default Billing Doctor** and select your doctor. Click **OK** and then **Close** to exit the General Settings area.

# ENTERING PATIENTS

Entering patients is simple with POMIS. Our main screen displays patients in a list format at the top of the screen with corresponding claims below. Tabs are logically sorted for easy patient look up. In addition, a “Task Pane” on the left side of the screen allows for easy navigation.



The POMIS main screen displays general patient information including balances due and next appointment.

- Click **Add Patient** in the Task Pane on the left side of the screen.
- Add Patient Name – Address – Social security number – Sex – Date of Birth
- Select a **Doctor**
- Select a **Fee Schedule** [use SELF for this example]
- Click Insert under **Insurance Information**.
- Select/Insert an Insurance Company by using the look up box next to **Code**, then enter a policy ID number.
- Click **OK** to save the Insurance information and then click **OK** again to save this visit.



**NOTE:** There are other optional fields available for entering patient information that you can use, as applicable.

You can also enter multiple insurance carriers in POMIS including Primary, Secondary and Tertiary plans.

## ENTERING VISITS

Create claims quickly for patients entered in POMIS.

- Highlight a patient on the front screen.
- Click **Add Visit** on the left side of the screen in the Task Pane.
  - Some fields will be prefilled with patient and doctor information but can be modified as applicable.
  - Select a **Diagnosis Code** under Charges and Payments
- Click **Add Item** under Charges and enter Procedure code, price, etc.
  - Procedure codes and prices can be entered into a master list for selecting in the future.
- Click **OK** to save
- Click **Add Item** to add additional charges OR click **OK** at the bottom right to save the visit.

Visit Will Be Changed (TRAVIS MONICA O - 02/28/2007 )

### Patient Demographics Summary for Travis Monica O

**Patient Information for** TRAVIS MONICA O  
 1729 ROYAL PALM DRIVE  
 EDGEWATER, FL 32132  
 Home: 386-427-5253 Cell: 000-000-0000 Work: 386-767-7007  
 Sex: F BirthDate: 09/18/1989  
 Account #: 100002 SSN: 234-56-7891

**Primary Insurance Information**  
 AETNA  
 P.O. BOX 1125  
 ORLANDO, FL 32779  
 Phone: 000-000-0000 Fax: 000-000-0000  
 Policy: AETNA  
 Group: 12345

**Patient Details**

Primary Ins Code:

Secondary Ins Code:

Tertiary Ins Code:

Primary Billing Party Name:

Secondary Billing Party Name:

**Lookups**

Treating Doctor:

Billing Doctor:

Supervising Doctor:

Referring Doctor:

Referring #:

Assistant:

Fee Schedule:

Place of Treatment:

**Visit Details**

Visit Date:

Statement of actual services

Pre-treatment estimate

Medicaid Claim

Prior Authorization #:

Epsdt Claim

Signature On File

Accept Assignment

First Visit Date of Current:

Is treatment result of:

State:

Form Type:

This area will be refreshed when you add a transaction.

### Charges & Payments

Diagnosis Code Index (optional)  
 1.  2.  3.  4.

Notes	DDS	DOS2	Procedure	Description	Total Amount	Ins Amount	Pt Amount	Misc.	D3
	02/28/07	02/28/07	99214	OFFICE VISIT ESTAB PT 55 MIN	65.00	60.00	5.00		02

Total Fee      65.00      60.00      5.00

**Charges**

Add Item

Modify Item

Delete Item

Add From Trtmt Plan

Add CDT Group

**Payments**

Add PT Payment

Add INS Payment

Payment Plan(s)

Transfer

Get Prev. Credit

**Printing**

Walkout Receipt

Triple Receipt

CMS Form

CMS Secondary

CMS Tertiary

**Notes**      Type:                  

Current Resp:

CONGRATULATIONS!!! You've just entered your first patient and visit...



## SUBMITTING CLAIMS

Claims can be submitted to insurance carriers daily, weekly, or whenever you prefer. Timely reimbursement is dependent upon error free claims submission. You can submit your claims in three ways using the POMIS system:

- **Individual printed paper claims**
  - Highlight patient and highlight visit on the bottom half of the screen
  - Click **Change Visit** in the Task Pane
  - Click **CMS form** to print.
- **Batch Print paper claims**
  - Print paper claims in a batch. Go to **Billing, Insurance Forms** in the menu at the top of the main screen or POMIS and select the criteria for your batch.
- **Electronic Claim Submission** [call for more details]

## PRINTING STATEMENTS

Effective patient correspondence is vital to a successful practice. POMIS Statements are formatted to be comprehensive yet simple for easy review by your patients.

- Click **Billing** in the menu bar at the top of the screen.
- Click **Statements**
- Select statement criteria and click **Search** at the top of the screen.
- Click **“View Statements to be Printed”** to preview statements before printing.

## ENTERING PAYMENTS

POMIS allows you to post insurance and patient payments quickly and easily.

ICD Code	Charge Amount	Amt Due B4 Pmt	Pmt Amount
09090	220.00	0.00	0.00

### Individual Payment Posting

- Highlight a patient and a visit on the front screen.
- Select **Change Visit** in the Task Pane.
- Click **Add PT payment** or **Add INS Payment** to post either a patient or insurance payment.
- Enter payment amount, payment type and other pertinent information as applicable.

### Batch Payment Posting

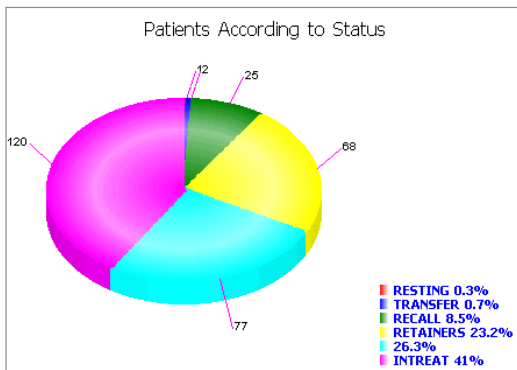
- You can also post large checks in a batch as a feature in your POMIS program.

# PRINTING REPORTS

There are a variety of reports in POMIS, each with several criteria selections. A combination of reports can be printed – daily – weekly – or whenever you prefer. Creating reports is easy and can benefit your practice.

## Available Reports Include:

- **Financial reports**
  - Deposit Slip
  - Daysheet [used to balance at the end of each day]
  - Daily Charges and Payment Summary
  - Income Reports
  - Charges Reports
  - Receivables Reports
  - **Aging Reports – by Ins or Patient**
  - Referring Doctor Frequency
- **Administrative Reports**
  - Patient List by... [select criteria]
  - **Patients By Referring Doctor**
  - Patient Phone Book
  - Procedure Frequency Report – Detail and Summary
  - Diagnosis Frequency
  - New Patient Mailing Labels – Laser
  - Patient in Pre-treatment Estimate Phase
- **Master List Reports**
  - Zip Codes
  - Diagnosis Codes
  - Insurance Companies
  - Fee Schedules
  - Referring Doctors
  - Places of Treatment
  - Procedure Codes with/without prices
- **Graphs**
  - Patients by Age
  - Patients by Sex
  - **Patients by Status**
  - Insurance Percentage
  - Charges/Payments by Month
  - Patients by Referring Doctor



## Appointment Daysheet

Appointment Day Sheet for Monday January 8, 2007

Report Date: 1/08/2007

Doctor ALL

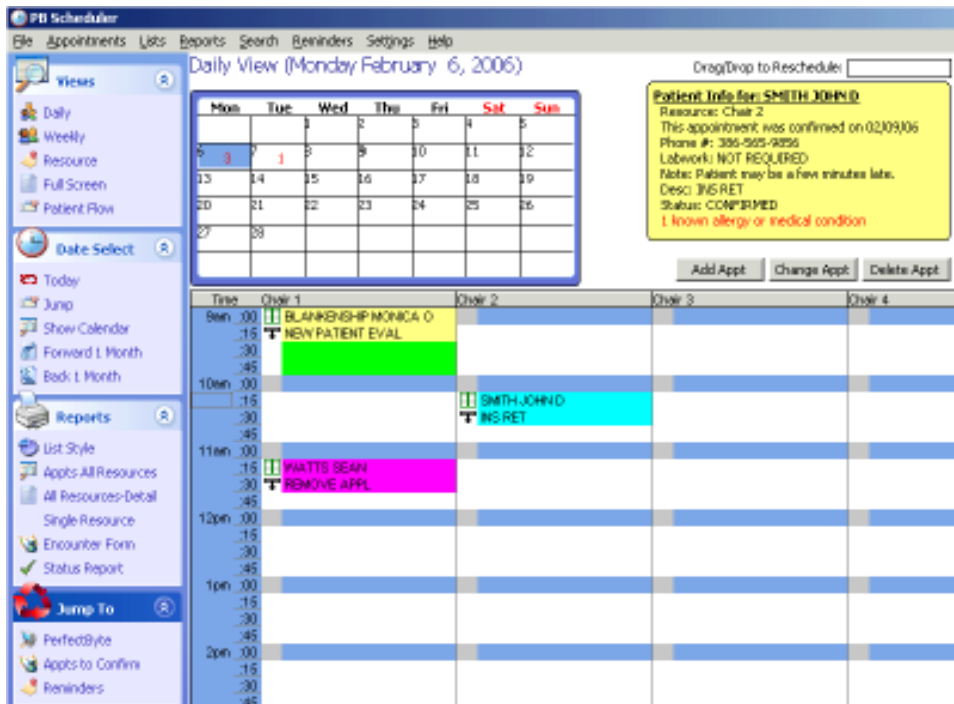
Page 1

Appt Time	Name	Insurance(s)	Tot Ins Bal.	Tot Pt Bal.	Due Now	Payment Amt	Payment Method	Notes
9:15 AM	MORRIS DONNA J	DELTA-GA CIGNA	6,613.60	986.16	220.52			Patient needs maint instructions again
10:00 AM	WILD DANIEL	DCAL	589.25	245.75	245.75			Please collect balance today.
10:30 AM	MILLER NANCY L	ADI BCBS-IL	427.00	813.08	257.56			
3 Appointments			Grand Total Due Now:		723.83			

Displays each appt time, patient name, total due and amount due now for quick reference by your front desk person.

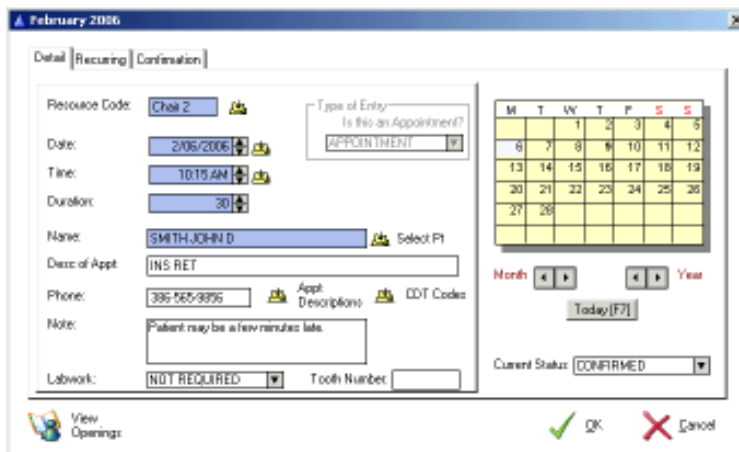
# SCHEDULING APPOINTMENTS

The POMIS Scheduler combines ease of use with rich features for **scheduling, confirming** and **tracking** your patients. The ability to **schedule by resource, appointment type color-coding** and **color blocking** allows you to customize the scheduler to meet your office needs.



## To add an appointment

- Select the day you would like to schedule the appointment using the calendar at the top of the screen.
- Double click on a time slot and complete the information on the appt screen. [see below]
- Click **OK** to save.



The scheduler also allows you to generate an on screen **appointment confirmation list** for any given day and tag appointments as you confirm.





---

We hope that the Quick Start Guide has helped you preview POMIS.

Please feel free to continue to enter patients, visits and appointments in the program and discover how user friendly it is.

If you have additional questions, please don't hesitate to give us a call.

**POMIS Support**

**866.967.6647**

**fax: 866-635-8252**

**[support@pomismedical.com](mailto:support@pomismedical.com)**

**[www.pomismedical.com](http://www.pomismedical.com)**

*POMIS® Quick Start Guide*  
Copyright © 2008 by POMIS® All rights reserved.

POMIS reserves the right to change, without notice, product offerings, product specifications and the information in this document. This document supersedes any prior document containing similar subject matter with regard to the descriptions of features and functionality of product offerings. You may receive supplements to this document based on changes that may occur to our products and services. This document may not be reproduced in any form without prior written permission from POMIS

8/29/2008

For more information about POMIS please contact us on the Web at  
[www.pomismedical.com](http://www.pomismedical.com)

POMIS® is a trademark of POMIS. All other product names are trademarks or registered trademarks of their respective owners. ©2008 POMIS. All rights reserved.



**POMIS®** by PerfectByte

5131 S. Ridgewood Ave. Suite A  
Port Orange, FL 32127

877.767.7007 Fax 866.635.8252

[www.pomismedical.com](http://www.pomismedical.com) [info@pomismedical.com](mailto:info@pomismedical.com)