

perfectbyte

PRACTICE MANAGEMENT SOFTWARE

perfectly simple

perfectly affordable



Quick Start Guide

Hardware Requirements

We have created three stages of hardware requirements. You should buy the best computer you can afford, as it will maintain its usefulness longer. If you do not understand any part of this document, please contact our support department and they will be happy assist you.

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	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
Inkjet Printer	Acceptable, however in the long run it will cost more than a laser printer and you will use more ink.
Laser Printer	A laser printer is your best bet. They print faster and cheaper than all other types of printers. Their drawback is they do not print in color. Also works best for recall cards, batch printing of labels, payment coupons, etc.
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 PerfectByte]	
Server Type	Peer to Peer or Dedicated server is acceptable. Windows 2000 or XP suggested for Server.
Workstations	Can be Windows98/Me 2000 or XP.
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 PerfectByte Trial CD to enter your first patient, charges and print your first ADA form; as well as giving you an overview of options for process claims, post payments, print reports, schedule 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 on the right.



From this menu you can install the trial copy of the program, or *Watch the Product Demo*. When you are ready to install the trail copy, click on the button that says *Install the Trial Software*. This will start the installation and you will see a screen similar to the one on the left. Choose **Next** to Continue. Accepting all of the default installation options is fine.




When it is complete, there will be a program group called PerfectByte 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 **PerfectByte** program, and one for the **PerfectByte Scheduler**.



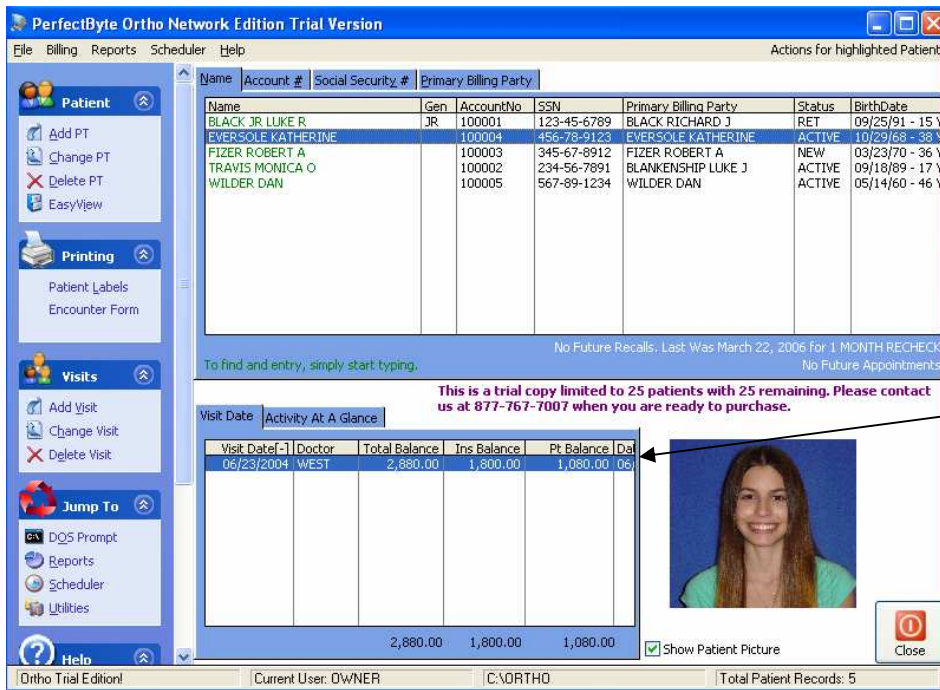
Congratulations! Now that you have installed PerfectByte you may proceed through the Quick Start Guide to try some basic functions of the program. Double Click the PerfectByte icon to begin.

Once in PerfectByte, 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 **Defaults** [again on the left side of the screen. Click on the look up folder  to the right of **Default Doctor** and select yourself. Click **OK** and then **Close** to exit the General Settings area.

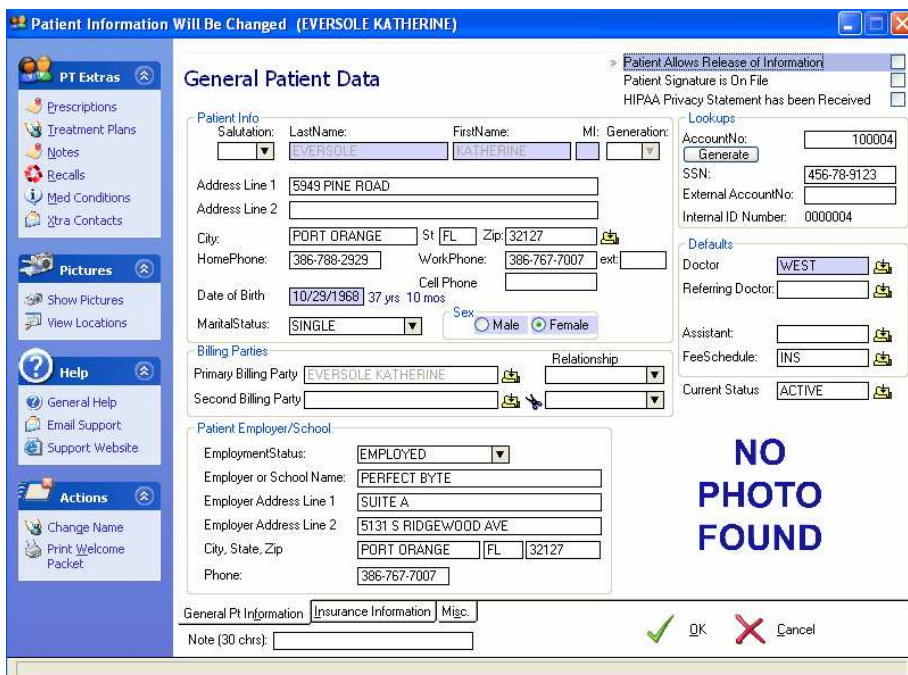
ENTERING PATIENTS

Entering patients is simple with PerfectByte. 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 PerfectByte 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 the **Insurance Information** Tab, located at the bottom of the patient information screen.
- Select/Insert an Insurance Company by using the look up box next to **Code** and enter a policy ID number.
- Click **OK** to save your work.



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

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

Click **Payment Plan**, then **Add New Plan** to create the patients payment schedule.

Enter Total Charge, Patient Responsibility and designate the number of payments and start date; then click **Calculate** to create their payment schedule.

Click **OK** to save the plan and **Close** to exit the payment plan screen. **[NOTE: If you have multiple Billing Parties you can simply add another plan and change the Billing Party information in Step 1]**

Once the Payment plan is created you can print coupons, a payment plan schedule or a customized contract for the patient.

Now let's do the same thing for the insurance company to set up their monthly or quarterly installment billing schedule.

Click the **Cont. of Treatment** button, located under the payment plan button on the visit screen; then **Add New Plan** to set up the payment schedule for the patients insurance companies.

Paymnt #	Date Due	Amount Due
1	09/01/2006	130.00
2	10/01/2006	130.00
3	11/01/2006	130.00
4	12/01/2006	130.00
5	01/01/2007	130.00
6	02/01/2007	130.00
7	03/01/2007	130.00
8	04/01/2007	130.00

Select the **Insurance Company**; enter the **Total charges, Ins Responsibility** and **Down Payment** if applicable. Decide on the **Payments Due** date, monthly or quarterly billing *[1 or 3 months]*, the **Number of Payments** and **Start** date.

Then click **Calculate COT Plan** in Step 3 to create your insurance installment payments.

Click **OK** to save your work. **{NOTE: if there are other insurance companies related to this charge then simply click Add Plan again to add another schedule.}**

Now that you have your continuation of treatment billing set up you can print individual ADA forms or print COT forms in a batch depending on your preference.

Click **Close** to exit the Continuation of treatment area.

Click **OK** to exit and save the visit.

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 PerfectByte 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 **ADA 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 PerfectByte and select the criteria for your batch.
 - To Batch Print continuation of treatment Forms; click Billing, then **Continuation of Treatment**.
 - **Electronic Claim Submission also available. [call for more details]**

PRINTING STATEMENTS

Effective patient correspondence is vital to a successful practice. PerfectByte 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

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

Record Will Be Added (New)

Step 1 - Choose Insurance That Made Payment
Insurance Code:

Step 2 - Enter Payment Amount & Type
Payment Amount:
Payment Type:
 CASH CHECK VISA MC AMEX OTHER
Check/Auth Number

Step 3 - Verify Payment Amounts for each Charge
highlight & double click to make modifications

CDT Code	Charge Amount	Amt Due B4 Pymnt	Pay Amount
D8080	270.00	0.00	0.00

Step 4 - Decide What to do with the Remaining Balance
Remaining Balance:
Action for Remaining Balance:
 TRANSFER TO PT TRANSFER TO SECONDARY
 WRITE OFF LEAVE

Optional Info:
Note:
Payment Date:

OK Cancel

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.
 - For patients on a payment plan click **Payment Plan** and then select to **Tag** the payment coupons you wish to apply the payments to and **“Post Payments to Tagged”**
- 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 PerfectByte program.

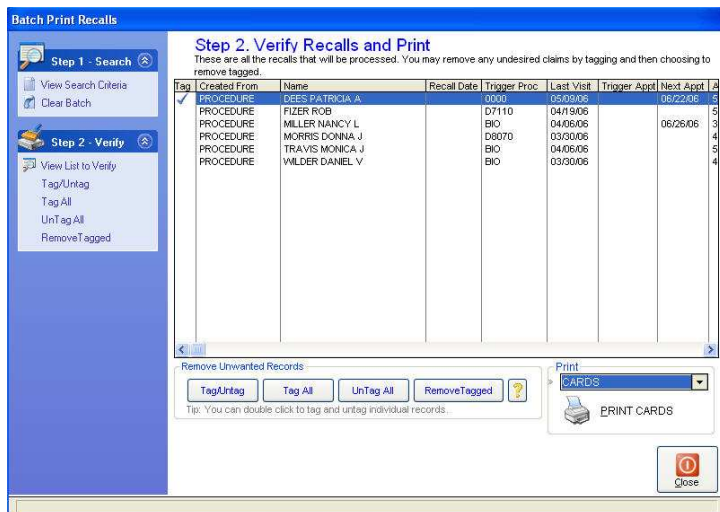
PRINTING REPORTS

There are a variety of reports in PerfectByte, 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.

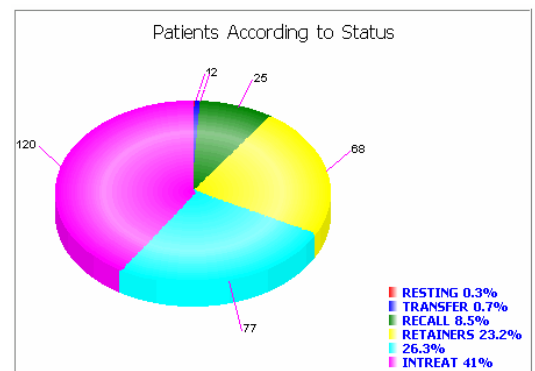
Available Reports Include:

- **Financial reports**
 - Deposit Slip
 - Daysheet [used to balance at the end of each day]
 - Payments due from Pay Plan
 - Daily Charges and Payment Summary
 - Income Reports
 - Charges Reports
 - Receivables Reports
 - Aging Reports
- **Patient Reports**
 - Patient List
 - Patient Status
 - **Patient Recalls [advanced patient recall module]**
 - Encounter Forms
- **Administrative Reports**
 - Batch Print Encounter Forms
 - Patient List by... [select criteria]
 - Patient Phone Book
 - CDT 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 – with ability to print labels
 - Places of Treatment
 - CDT Codes with and without prices

Advanced Patient Recall Module

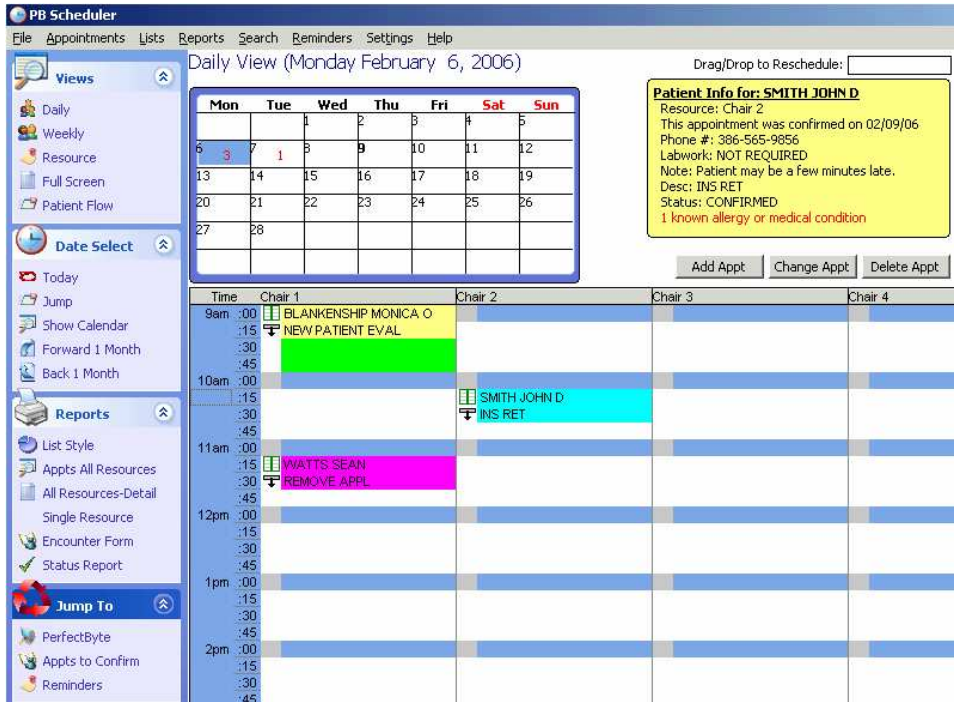


- **Graphs**
 - Patients by Age
 - Patients by Sex
 - **Patients by Status**
 - Insurance Percentage
 - Charges/Payments by Month



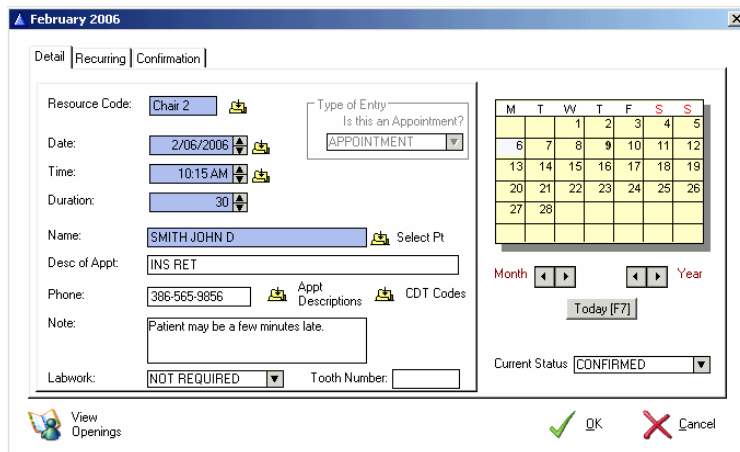
SCHEDULING APPOINTMENTS

The PerfectByte 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.

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

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.

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