HCFA-1500

Fill & Print / eDirect

User Manual

v1.65

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January 2026

Welcome!

Please enjoy our software.

If you have any questions, comments,

problems, solutions, compliments,

or issues,

please contact us!

UB04software.com Customer Service
E: Support@UB04software.com

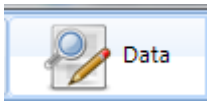
P: 866.829.2763 | F: 866.795.4975

W: www.UB04software.com

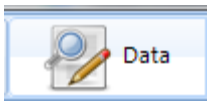
New Toolbar!

Replaces:

- Blank Form with Prefills
  - Create a brand-new, blank form that includes your **Prefills** ☆
- Blank Form
  - Create a brand-new, blank form.
- Form for Patient (+ Page)
  - Create a new page for the Current Patient
  - Removes data in Box 24A - J

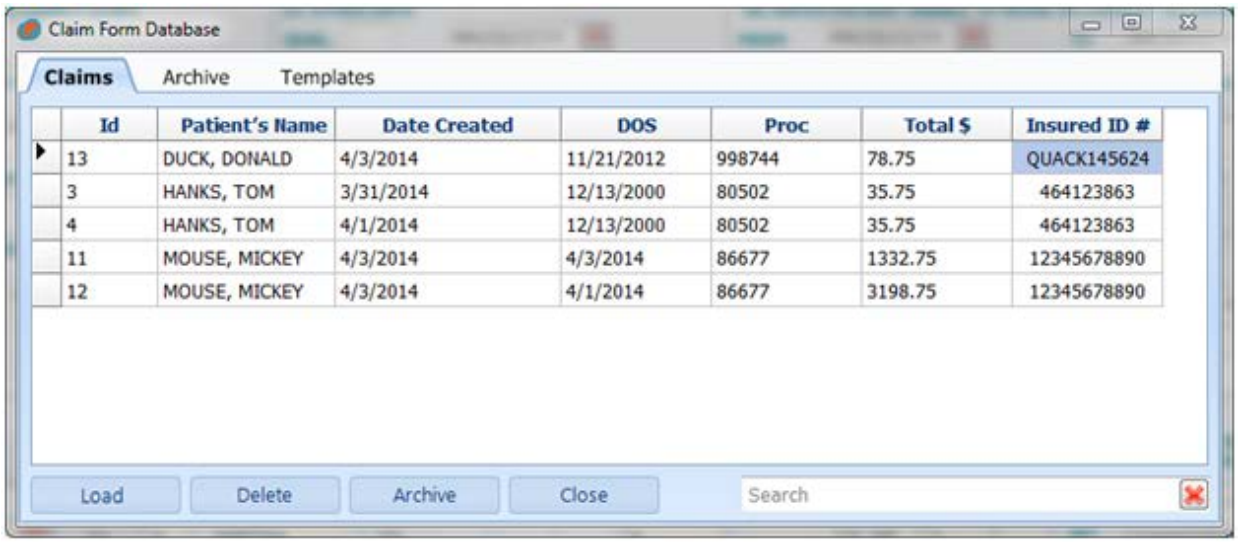


- Save
  - Save your current form.
  - Adjust this button's function in *Options > Load/Save*
- Load
  - Load a form.
  - Adjust this button's function in *Options > Load/Save*

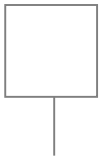


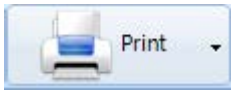
- Open From File with Prefills
  - Load claims from a file (e.g. *.npi, *.hcfa1500) with **Prefills** ☆
  - *Select multiple claims! (CTRL+Click or SHIFT+Click)*
- Open From File
  - Load claims from an external file (e.g. *.npi, *hcfa1500).
  - *Select multiple claims! (CTRL+Click or SHIFT+Click)*
- Open From Database
  - Load claims from the internal *Claim Form Database* (see below).
- Save To File **(Save As)**
  - Save claims to an external file (*.hcfa1500), **anywhere**.
- Save To Database
  - Save claims to the internal *Claim Form Database* (see below).

Claim Form Database - *Open using **Data > Open From Database***

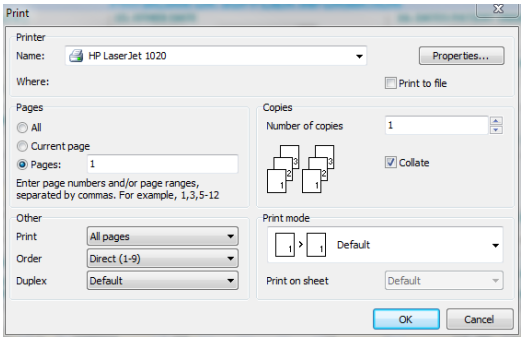


- Tabs
  - **Claims**: Main storage. Your claims.
  - Archive: Alternate claim storage. *Optional.*
  - Templates: Template files. *Create by leaving Patient Name blank.*
- Search bar - Bottom-right corner. Explore in real-time.
- Choose a claim to open and press **Load**.

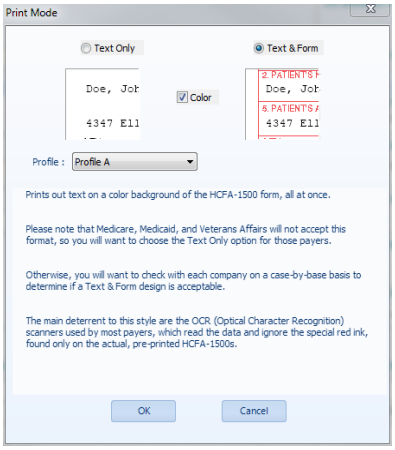




- **Print** Now!
  - Always **prints** the data. Will print the form based **Print Mode**.
  - Can print Text Only or Text & Form (color, b&w).

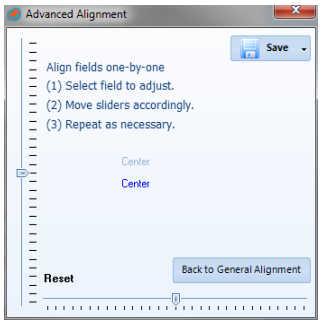


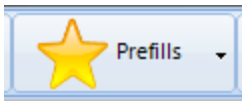
- Batch Print
  - Print multiple pages at one time.
- **Print Mode**
  - Choose between **Text Only** or **Text & Form**.
  - *Text & Form prints in color or black & white.*



- Print Font
  - Adjust the printed font. Bold option.
- General Alignment
  - Adjust the print alignment in large chunks.
  - *Up-Down is vertical movement; Left-Right is horizontal movement.*
  - *Set* Profiles *for multiple alignment setups.*
  -

- Advanced Alignment
  - Adjust print alignment field-by-field.

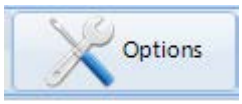




Prefills

- Fill out data to be saved and applied to future claims. *Time-saver.*
- Setup multiple "Profiles" from the dropdown.
  - *Rename by right-clicking*.
- ~
- Save & Apply: Save entry and apply to current form.
- Save: Save data entries and any changes in Form Prefills.

To move/backup all your HCFA claims from the internal HCFA software database, please carefully follow the instructions below:
On the HCFA 1500 ToolBar, select OPTIONS>Backup/Restore Database. The screen below will appear.
image.png
2. Click CHOOSE FILE and name the file something you will remember. Please note it ends in the suffix XXXXX.zHCFA.
3. Click BACKUP. You have now backed all your claim files up to the drive you just selected.
4. When the HCFA software is reinstalled on the new computer, go to the HCFA 1500 ToolBar, select OPTIONS>Backup/Restore Database.
5. Click CHOOSE FILE and select the backup file you made ending in the suffix XXXXX.zHCFA.
6. Click Restore.
7. You will need to sign out of the HCFA software and log back in.
8. All your old HCFA claim files are now available in the Internal database on the new computer.

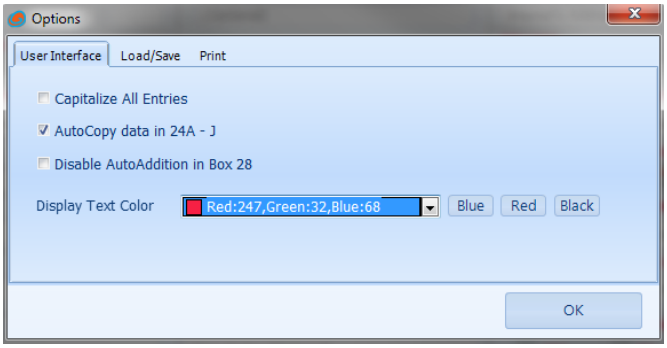


- Options - Preferences; Password; Backup/Restore Data; Setup Wizard
  - **User Interface:**
  - Capitalize All Entries: Auto-capitalize data entry.
  - **AutoCopy** data in 24A - J: Copies data vertically (down). *AutoFill*.
  - Disable AutoAddition in Box 28 (Total Charges).
  - Disable AutoFill from Box 6 (Self):
    - Turns off Patient-to-Insured data copying.
  - **Display Text Color**: Change the color of the form's text.

  - **Open/Save:**
  - Overwrite when Load From File:
    - When loading multiple files at once, overwrite if file exists.
  - Open/Save From File **Toolbar Function**:
    - Toggles the Load/Save toolbar icons to:

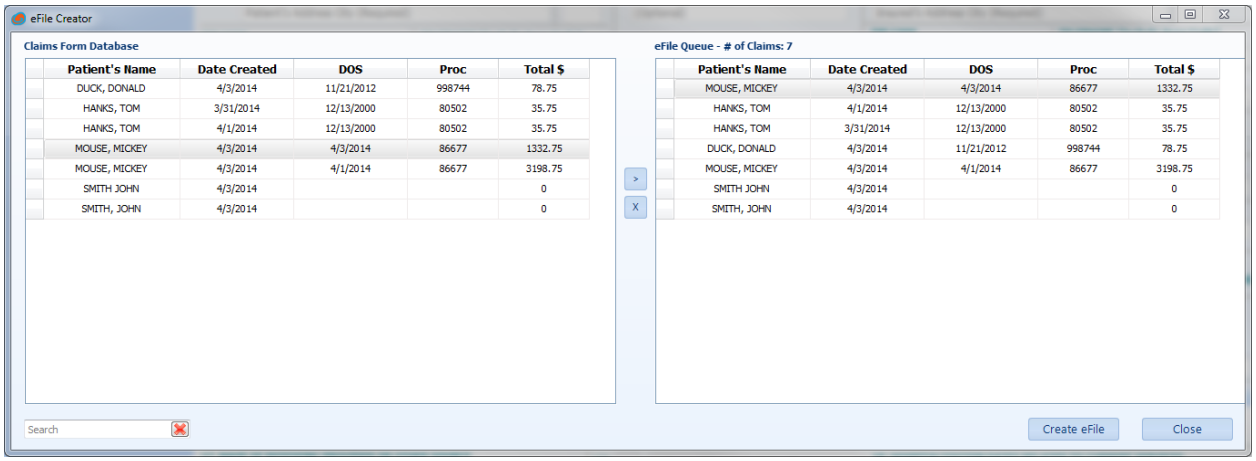
      - Load/Save internally to the database (***default***).
      - Load/Save externally to a file.
  - Open File Location: Default "Load From File" location.
  - Save File/ eFile Location: Default "Save To File" location.

  - **Print:**
  - Display Print Mode before Print.
  - Remove Print Commas (Box 2 & 4): Disables comma output.
  - Date Output: Adjust the date print output separation character.
  - Date-Year Format: Print years of date fields in CCYY or YY format.
    - Apply to Box 3 & 11a: Check to enable.



eClaims*

- Create **eFile**: Generates a *.ehcfa Print Image file.
- *Valid 'Print Image' eFile (electronic) output.*
  - *Can open as *.txt - with Notepad.*
  - **Only visible in eDirect edition.*

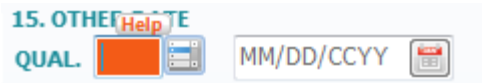


How do I create eClaims?

- Click the *eClaims* button.
- Click the *eFile Creator* option.
- "Move" the relevant claims--the ones you wish to submit--to the right-hand list using the arrow buttons.
- Click *Create eFile*.
- Choose a processor. More information **here.**
- Save the file to an easy-to-reach location (e.g. Desktop).
- Login to your processor & upload *only* the *.ehcfa file.
  - *Any other type of file will not work*.
- ~
- **How-To Demo**: UB04software.com/how-to/eClaims

- Help
  - Opens HCFA-1500 Instructions - *NUCC Manual*.
- Retrieve Registration
  - Enter one piece of information & click Retrieve Registration.
  - Clear Database to remove all internally saved claim data.
  - Deactivate to preserve the user license.
- Check for Update
  - Scours the interwebs for a software update.
- Website
  - Opens your favorite website, UB04software.com.
- About
  - Shows version number, build date, and edition name.
  - *Always great information to send your Support Agent!*

- Status Bar
  - **Current** Patient's Name. *Double-click to Load Form.*
  - **Status**: Opened claim's status. *Double-click to Save Form.*
    - Status: Saved - Claim successfully saved.
    - Status: Changed! - Claim changed. *Save to avoid data loss.*
    - Status: Loaded - Claim successfully loaded.
  - **Progress Bar:** Tells you when the program is busy.



- Field Options
  - **Help** boxes - Hover to display the NUCC standard for that field.
  - **Dropdown** boxes - Click and choose.
  - **Calendar** boxes - Click to view calendar widget.

Common Issues

How do I create eClaims?

- Click the *eClaims* button & select *eFile Creator*.
- "Move" the relevant claims-to the right-hand list.
- Click *Create eFile*. Choose a processor. More information **here.**
- Save the file to an easy-to-reach location (e.g. Desktop).
- Login to your processor & upload *only* the *.ehcfa file.
  - **How-To Demo**: UB04software.com/how-to/eClaims

Where is Importation (Excel/CSV)?

Importation (*How To*)**:**

- Data > Import From > MS Excel > 02-12 HCFA
  - To obtain "our format," view the Template instructions below.
- You can *also* import with **Prefills**:
  - Set these ahead of time by clicking Prefills.
  - Data > Import From > MS Excel *with Prefills* > 02-12 HCFA

Creating an Importation Template:

- To **create a template:**
  - Data > Export To > MS Excel > Create Template (button)

Using Importation Template:

- You can enter your data into this Excel spreadsheet, with **each row representing a new claim** form (to be created).
- Please note that you do **not** have to fill out every field in this template.
  - Whatever is left *blank* will be imported *blank*.
- Upon importing the data, you will be prompted for a save location.
  - We recommend creating a new folder, as you can easily create hundreds of claims at one time.
- After importation, the claim files will be editable in the software.

- **Why does the form look jumbled and disjointed?**
  - Choose the "Smaller - 100%" text magnification in Windows.
  - Walkthrough: Windows.Microsoft.com/en-us/Windows7/Display-Magnification

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- **How do I change the blue color of form's text?**
  - Options > Display Color Text. Have fun!

- **Where is AutoFill? I loved that feature!**
  - Options > AutoCopy data in 24A - J

- **Will this work with [Insurance Company XYZ]?**
  - It should, our software is based off of the NUCC standards.
  - *They are the folks that make the form.*

- **Does this work on Mac OS X?**
  - Yes, using CrossOver by Codeweavers.
    - It creates a sub-section of folders to run this program.
  - (1) First, go here: Codeweavers.com/UB04software.com
  - (2) Install CrossOver.
  - (3) Install UB04software.com's product (using the CrossTie).
  - ~
  - **How-To Video:** YouTube.com/CrossOver-UB04software.com
  - ~
  - **Coupon** Codes for 25% off CrossOver: via_HCFA-1500
  - *Users also report success with* Parallels *&* VMware Fusion.