



File-Mate 1500
User Guide

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File-Mate 1500 User Guide

Table of Contents

Welcome to the File-Mate 1500 Health Insurance Claim Form compliance application. File-Mate 1550 is designed to help you easily and effectively manage reporting your HCFA or CMS 1500 information.

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Welcome to File-Mate 1500

File-Mate 1500 is a tool to organize and print your data for the Health Insurance Claim Form 1500 that health care providers must submit for payment of services. File-Mate 1500 is organized as a database. As you enter data, the program automatically saves and arranges the data to fit the 1500 form. Easily move within a specific patients' 1500 form(s) by using our quick tabs. Editing is easy, just click the tab where the information you need to change is located and update your data.

Installation

You must use the installation program to install File-Mate 1500 - You can't install File-Mate 1500 by dragging files to your hard disk.

To install File-Mate 1500 on your hard disk:

- 1) Insert the CD into your CD or DVD drive, or

Click on the link in the email or receipt you received upon purchase of the software

Or use the link to install the DEMO from our website: www.formmagic.com

- 2) When you see the File-Mate 1500 Welcome panel, click NEXT to continue. Agree and accept the Licensing agreement. Click Next to continue.
- 3) In the Destination Location panel, choose the folder where you want to install File-Mate 1500.

By default, File-Mate 1500 will be installed in the **C:\ File-Mate\FM4** or in the Applications folder on a Mac.

If you want to install File-Mate 1500 in another folder or on another drive, click the drop down menu within the folder display and navigate to the folder where you want to install File-Mate. If the selected disk doesn't have enough space for the files you select, or is write-protected, you can leave the installer and delete existing files to make more room on the disk. If the disk is locked, or isn't a hard disk, you can choose another drive.

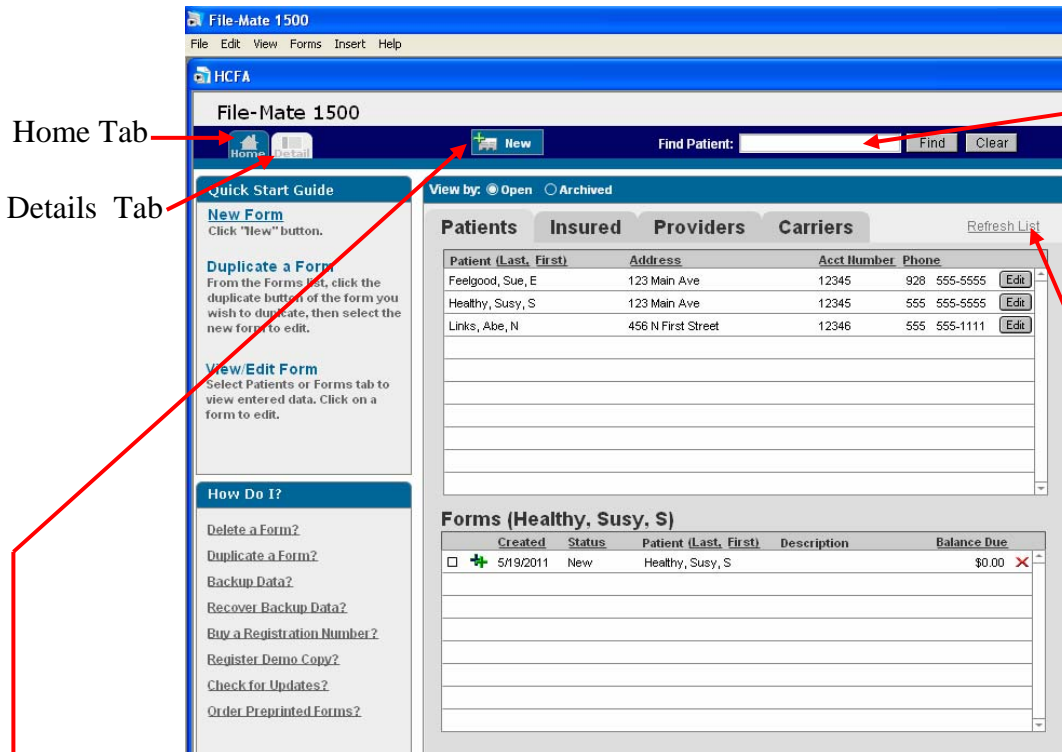
Click NEXT.

- 4) In the Select Start Menu Folder window, select the name that you would to have display in your Windows Start menu. Default is File-Mate 1500. Click Next to continue.
- 5) In the Select Additional Tasks window, you can choose to have a desktop icon and/or a quick launch icon created. Click Next to continue. We suggest you have an icon placed on the desktop.
- 6) The Summary window is a summary of your previous choices, examine the contents, if they are correct, click Install to begin the installation.
- 7) When the installation is complete, click Finish.
- 8) The program will now launch.

THE HOME TAB Overview

The Home page is the starting point for finding patient data or creating a new 1500 form. You can return to this view while anywhere in the program by clicking on the Home Tab.

You can access entered data by clicking the titles at the top of the list.



You can quickly access a patient through the Find Patient search feature. Enter a few letters of their first or last name and click FIND.

Need to see all your patients?



Click on the REFRESH LIST button.

Home Page Tabs

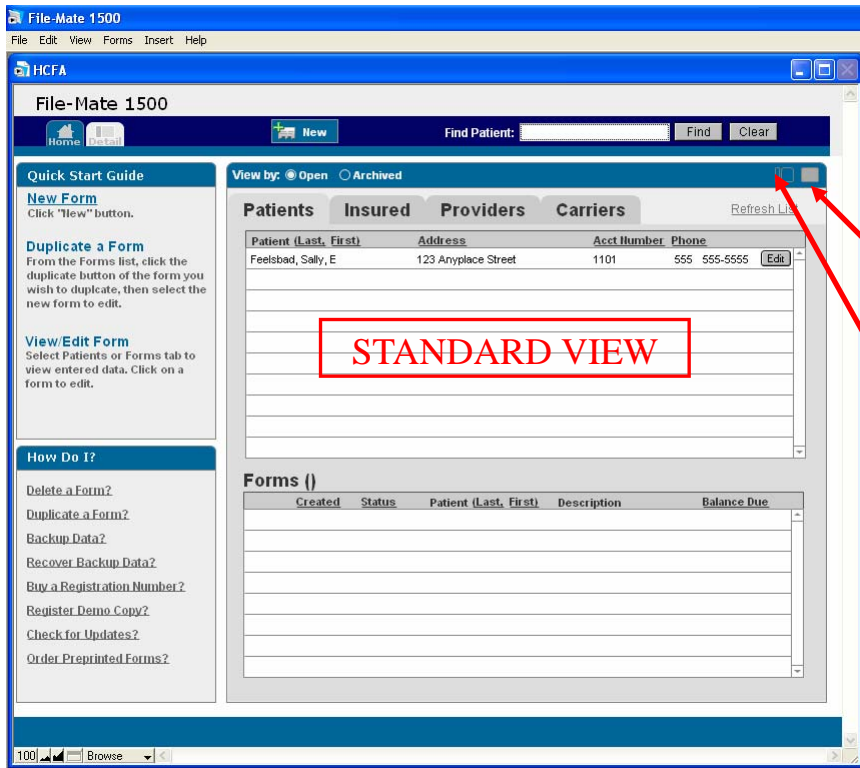
Patient Tab: Clicking on the Patient tab will show each Patient entered into the system. Click the Patient you wish to view and any associated forms will be listed in the Forms list in the bottom half of the screen.

Click on the form you wish to open to edit or click the NEW button to create a new blank form for the patient.

If this is a new visit and you need to create a New Form, then click on the NEW button at the top of the screen. You will then be brought to the form to enter patient data.

See [Creating a New Form \(page 8\)](#) for details for entering New Patients.

Insured, Providers and Carrier Tabs: While in the Home Tab, you can see a listing of all Insured, Providers or Carriers in your system, by clicking on the appropriate tab. Once on the correct tab, click on the name of the Insured, Provider or Carrier to see all forms related to that entity.

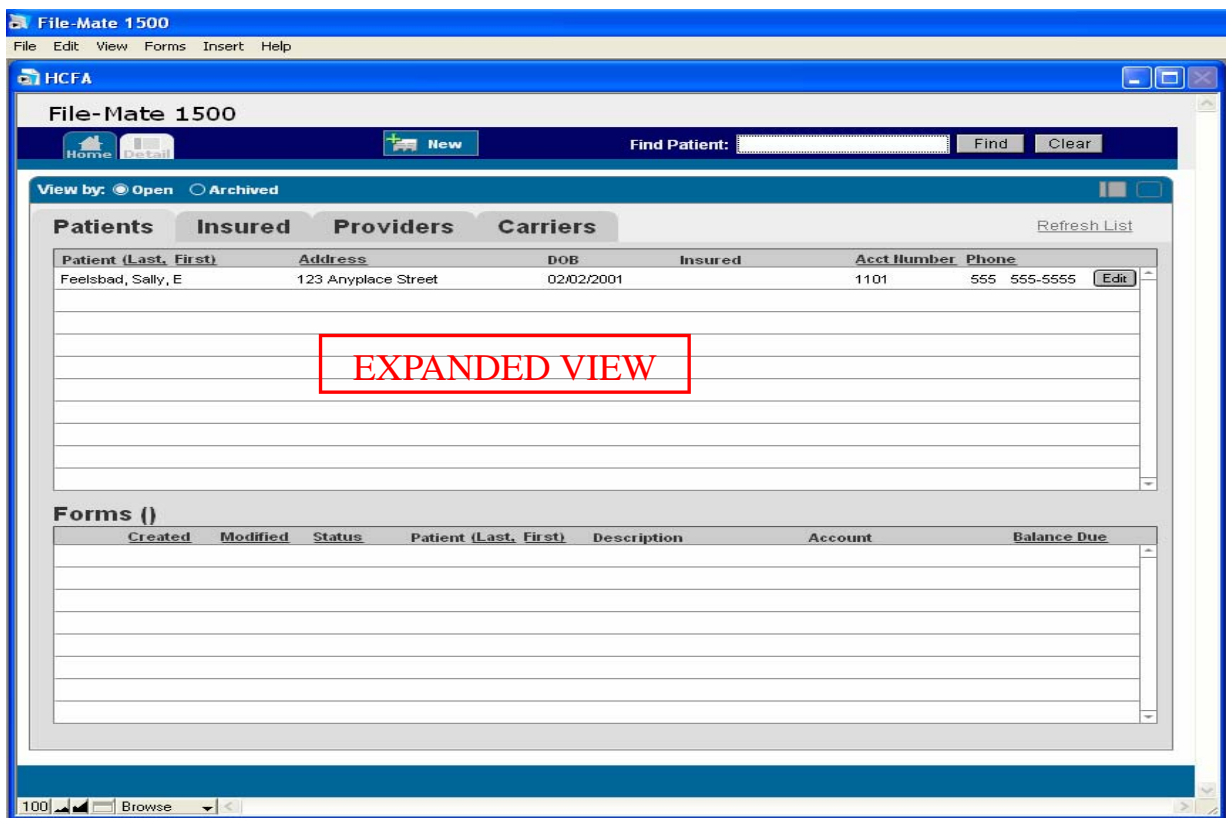


Two views are available on the Home Tab. A standard view and an expanded view.

Click on this button to EXPAND the List view.

Click on this button to RETURN to the standard list view.

The EXPANDED list view offers more Patient and Form data on each line for quick reference.

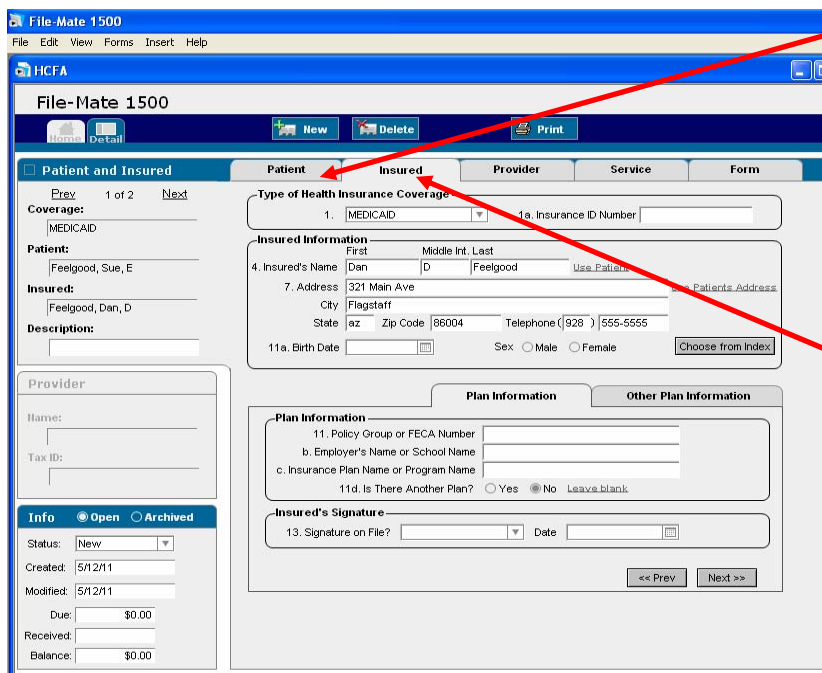
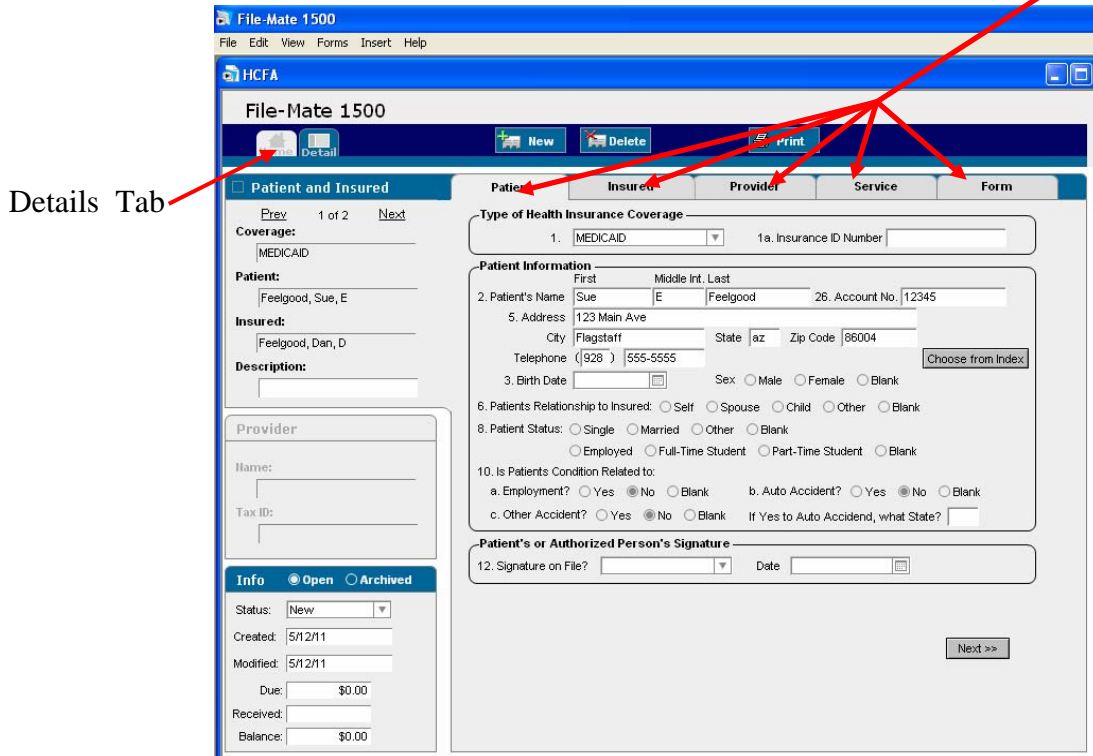


THE DETAIL TAB Overview

This view will give you the contents of your patients' record. You can access this view by selecting a patient and clicking on the DETAILS tab or by clicking on the patient name on any form listed on the bottom of the screen on the home page.

The tabs in this view correspond to the different areas of information on the actual 1500 form.

You can easily move around the 1500 form by clicking the tabs (Patient, Insured, Provider, Service, Form) at the top of the entry screen.



The Insured tab is the information for items 1, 4, 7, 9 and 11 of the actual 1500 form.

File-Mate 1500
File Edit View Forms Insert Help

HCFA

File-Mate 1500

Home Detail New Delete Print

Patient and Insured

Prev 1 of 2 Next
Coverage: MEDICAID
Patient: Feelgood, Sue, E
Insured: Feelgood, Dan, D
Description:

Provider

Name:
Tax ID:

Info Open Archived

Status: New
Created: 5/12/11
Modified: 5/12/11
Due: \$0.00
Received:
Balance: \$0.00

Patient Insured Provider Service Form

Service and Billing Information

25. Tax ID SSN EIN Leave blank Choose from Index
27. Accept Assignment? Yes No Blank Phone Number ()
32. Service Facility Location Information 33. Billing Provider Info & Phone Number
a. NPI a. NPI
b. Other ID b. Other ID

Physician or Supplier Signature

Signed Name Date

Carrier Information

Do not use commas, periods, or other punctuation in the address. Choose from Index
Name
Address
Address
City, St Zip

<< Prev Next >>

The Provider tab is the information for items 25, 27, 32 and 33 on the actual form.

File-Mate 1500
File Edit View Forms Insert Help

HCFA

File-Mate 1500

Home Detail New Delete Print

Patient and Insured

Prev 1 of 2 Next
Coverage: MEDICAID
Patient: Feelgood, Sue, E
Insured: Feelgood, Dan, D
Description:

Provider

Name:
Tax ID:

Info Open Archived

Status: New
Created: 5/12/11
Modified: 5/12/11
Due: \$0.00
Received:
Balance: \$0.00

Patient Insured Provider Service Form

Dates of Illness

14. Date of Current. (Illness, injury or pregnancy)
15. If Patient has had some or similar illness. (give first date)
16. Dates Patient Unable to Work in Current Occupation. From To
18. Hospital Dates Related to current Services. From To

Date & Procedures Charges Supplemental

21. Diagnosis or Nature of Illness or Injury

I 1 I 2 I 3 I 4
Text Text Text Text
Relate Items 1, 2, 3 or 4 to Diagnosis Pointer by line in the follow section.

Date & Procedures (24 A-E)

	Date(s) of Service (From/To)	Place of Service	EMG	Procedures, Services, or Supplies CPT/HCPS	Modifiers	Diagnosis Pointer
<input type="checkbox"/>	1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Description					
<input type="checkbox"/>	2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Description					
<input type="checkbox"/>	3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Description					
<input type="checkbox"/>	4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Description					
<input type="checkbox"/>	5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Description					
<input type="checkbox"/>	6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Description					

Delete line

<< Prev Next >>

The Service tab is the information for items 14, 15, 16, 17, 18, 20, 21, 22, 23, and 24 on the actual form.

If you have questions about the data and how to fill out this HCFA 1500 form per requirements, visit:

www.nucc.org



The FORM tab shows you a replica of the actual 1500 form. All the data you entered will show up here. You can use this as an accuracy check before printing.

The screenshot displays the File-Mate 1500 software interface. At the top, there is a menu bar with 'File Edit View Forms Insert Help'. Below that is the HCFA logo and the title 'File-Mate 1500'. A navigation bar contains 'Home Detail' buttons and 'New Delete Print' action buttons. The main area is divided into several sections:

- Patient and Insured:** Includes 'Prev 1 of 1 Next' navigation, 'Coverage: CHAMPVA', 'Patient: Links, Abe, N', 'Insured: Links, Abe, N', and a 'Description:' field.
- Provider:** Includes 'Name:' and 'Tax ID:' fields.
- Info:** A sidebar with 'Open Archived' buttons, 'Status: New', 'Created: 5/19/11', 'Modified: 5/24/11', 'Due: \$0.00', 'Received:', and 'Balance: \$0.00'.
- Form Tab:** A tabbed interface with 'Patient', 'Insured', 'Provider', 'Service', and 'Form' tabs. The 'Form' tab is active, showing a '1500 HEALTH INSURANCE CLAIM FORM'. The form contains various fields for patient information, insurance details, and provider information, with a 'Signature on file' and 'DATE: 5/19/2011'.




Use the Prev and Next buttons to scroll through multiple forms for this patient.

Creating a 1500 Form

Creating a New Form

There are three options to create a new 1500 Form:

- From the HOME page click the NEW  button
- From the drop-down menus select Forms then New Form
- Hold down the CTRL key and type N (CTRL+N).

Entering Your Data

Entering a new patient is easy in File-Mate 1500. Use one of the methods listed above to open a new record. The Patient tab will now be opened and a new, blank patient record will be displayed.

Simply enter the patient information. Use the tab key to move from field to field. Use the drop down menus, where available to quickly fill in data. At the bottom of each section there is a NEXT button to click to take you to the next part of the form. File-Mate 1500's simple, wizard style of entry makes completing forms easy and fast!

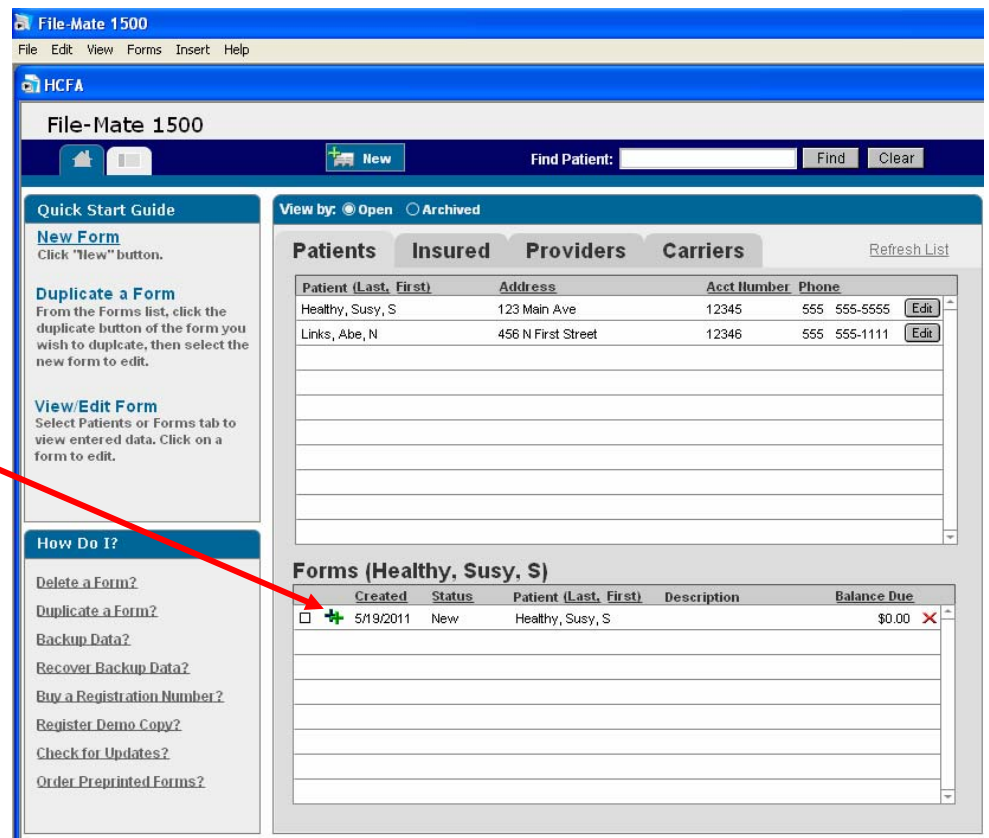


Note: File-Mate 1500 auto-captures key data that you enter and places it in an “**Index**”. This index is available to you to use to quickly enter data. You will see a CHOOSE INDEX button for applicable sections such as Patients Names, Insured Information, Carrier and Billing information.



Quick Entry Tip!

When you have a returning patient you can quickly **DUPLICATE** a previous form for the new service. Click on the PLUS symbols and a new form will automatically be created. You can open the form to make any changes needed for this visit.



The screenshot shows the File-Mate 1500 software interface. The top menu bar includes File, Edit, View, Forms, Insert, and Help. Below the menu bar, there is a navigation area with a Home icon, a New button, and a Find Patient search box. The main content area is divided into several sections:

- Quick Start Guide:** Contains links for New Form, Duplicate a Form, and View/Edit Form.
- How Do I?:** Contains links for Delete a Form?, Duplicate a Form?, Backup Data?, Recover Backup Data?, Buy a Registration Number?, Register Demo Copy?, Check for Updates?, and Order Preprinted Forms?.
- Patients List:** A table with columns for Patient (Last, First), Address, Acct Number, and Phone. It lists two patients: Healthy, Susy, S and Links, Abe, N.
- Forms (Healthy, Susy, S):** A table with columns for Created, Status, Patient (Last, First), Description, and Balance Due. It shows a single form entry for 5/19/2011, New, Healthy, Susy, S, with a balance due of \$0.00.

A red arrow points from the text in the 'Quick Entry Tip!' section to the plus sign (+) in the 'Forms' table, indicating that clicking the plus sign creates a new form.

Tips for Entering Data:

INSURED TAB—MULITPLE INSURANCE PLANS:

In the **Insured** section there are two tabs; Plan Information and Other Plan Information. If you click the YES button for Other Plan, you will be automatically prompted to fill in that information when the NEXT button is clicked. After completing the Other Plan Information clicking the NEXT button will take you to the **Provider** data page.

SERVICES TAB — DATES / PROCEDURES, CHARGES, SUPPLEMENTAL SECTIONS:

The **Services** data page has a number 3 tabs within this section:

DATES / PROCEDURES, CHARGES, SUPPLEMENTAL.

- Fill in dates related to the patients' illness.
- Then number the illnesses or injuries related to your patient and begin filling in your service Dates and Procedures.
- Click the NEXT button to move to the CHARGES tab and continue entering the information.
- Click the NEXT button to take you to the SUPPLEMENTAL tab and the last information about your clients' services.
- At the bottom of the Supplemental tab you can see the Print button to print the form or click on the Form tab to review the form before printing.

The Patient Tab - Tips

File-Mate 1500

File Edit View Forms Insert Help

HCFA

File-Mate 1500

Home Detail New Delete Print

Patient and Insured

Prev 1 of 1 Next

Coverage: MEDICARE

Patient: Healthy, Susy, S

Insured: Healthy, Joe, A

Description:

Provider

Name:

Tax ID:

Info Open Archived

Status: New

Created: 5/19/11

Modified: 6/2/11

Due: \$0.00

Received: \$0.00

Balance: \$0.00

Patient

Insured

Provider

Service

Form

Type of Health Insurance Coverage

1. MEDICARE 1a. Insurance ID Number 125-125-125

Patient Information

2. Patient's Name Susy S Healthy 26. Account No. 12345

5. Address 123 Main Ave

City Anytown State FL Zip Code 10000

Telephone (555) 555-5555 Choose from Index

3. Birth Date 5/19/1955 Sex Male Female Blank

6. Patients Relationship to Insured: Self Spouse Child Other Blank

8. Patient Status: Single Married Other Blank

Employed Full-Time Student Part-Time Student Blank

10. Is Patients Condition Related to:

a. Employment? Yes No Blank b. Auto Accident? Yes No Blank

c. Other Accident? Yes No Blank If Yes to Auto Accident, what State?

Patient's or Authorized Person's Signature

12. Signature on File? Signature on file Date 5/19/2011

Next >>

Use the Prev and Next buttons to scroll through multiple forms for this patient.

- This **Description** field will show up as a description of the reason for the visit when you are on the Home Screen.

Info Section: This section relates to a specific FORM.

- **Open** - active form for a patient.
- **Archived** - You can use this status to take the **FORM** off of the active list. You can consider using this status for completed service, non-active patients or any reason you determine to call a form "archived". This form will still be accessible to view by changing status to archived.
- **Status:** Use the drop down menu to select the appropriate status of the form
 - ◆ **New:** for new forms.
 - ◆ **Updated:** if changes have been made.
 - ◆ **Submitted:** to insurance.
 - ◆ **Completed:** claim has been paid.
 - ◆ **Edit:** Allows you to edit the names of the above Categories or add your own categories.
- **Modified:** shows the last time this form was modified.
- **Due:** Total amount due for service.
- **Payment :** Record any payments here.
- **Balance:** This will show any remaining balance due.

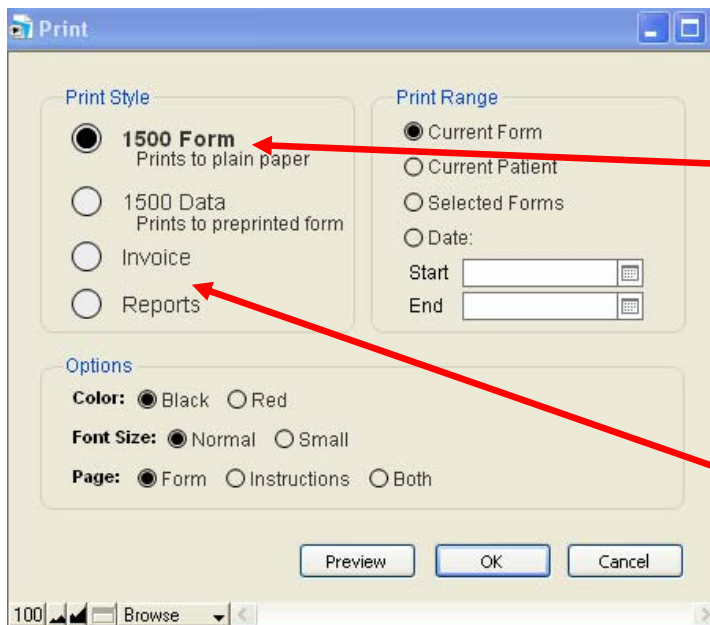
Printing:

File-Mate 1500 is capable of printing your document in two formats:

- Preprinted red 1500 form, or
- Plain paper in either Black or Red ink.

To access the Print dialog:

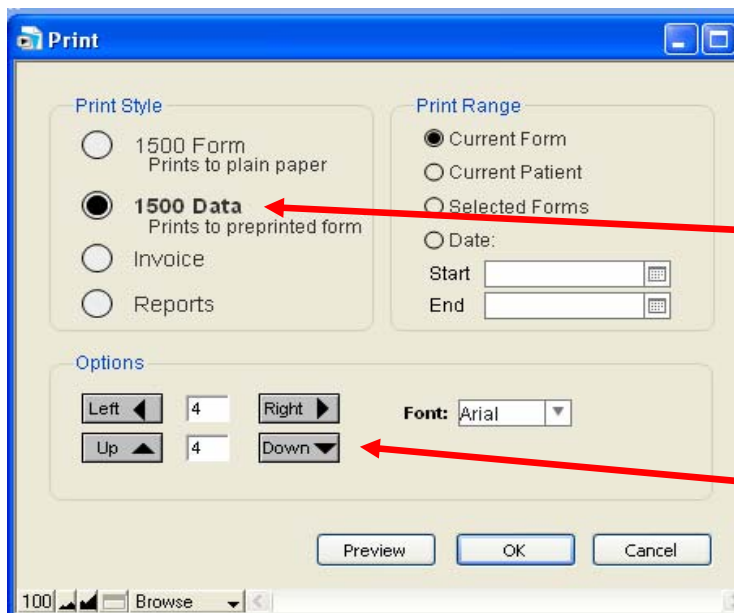
- Use the File Drop Down Menu and select the Print menu item.
- Click on the Print Button near the top of the screen
- Access the Print Dialog anywhere in the program by using the Quick Key (CTRL-P)



To Print to PLAIN PAPER:

- Click on the 1500 Form
- Check your print range
- Choose ink color under Options as well as other settings.
- Preview if needed
- Or click OK to print.

Invoices and Reports will be addressed in a separate section.



To Print to PRE-PRINTED 1500 FORM:

- Click on the 1500 Data Button
- Check your print range
- Preview if needed
- Or click OK to print.

Notes:

If you are having alignment issues with your printer, use the Left, Right, Up and Down arrows to adjust alignment to your form.

Use this setting with plain paper and then hold the printout to an actual form to see if adjustment worked to save using many pre-printed forms during the adjustment process.

print

1500

HEALTH INSURANCE CLAIM FORM

APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE

1. MEDICARE: MEDICARE A MEDICARE B PRIVATE CHAMPUS CHAMPUS SPOUSE MEMBER OR GROUP HEALTH PLAN FECA BLK LING FECA (SSN) OTHER (SSN)

2. PATIENT'S NAME (Last Name, First Name, Middle Initial): **Healthy, Susy, S**

3. ADDRESS: **123 Main Ave**

4. CITY: **Anytown** STATE: **FL**

5. ZIP CODE: **10000** TELEPHONE: (555) 5555555

6. EMPLOYER'S NAME OR SCHOOL NAME: **ACB Group**

7. DATE OF CURRENT ILLNESS (First symptoms) OR POLICY (Accident or PREGNANCY CLAIM): **05 17 2011**

8. PATIENT'S STATUS: Single Married Other

9. PATIENT'S DATE OF BIRTH: **02 22 1952** SEX: M F

10. EMPLOYER'S POLICY OR GROUP NUMBER: **123-123123**

11. PATIENT'S COBATION (RELATED TO): YES NO

12. PATIENT'S OCCUPATION (Current or Previous): YES NO

13. PATIENT'S PLACE (State): **ACB Group**

14. PATIENT'S SIGNATURE: **Signature on file**

15. PATIENT'S SIGNATURE: **Signature on file**

16. DATE PATIENT UNABLE TO WORK: CURRENT OCCUPATION: **05 17 2011**

17. HOSPITALIZATION DATES RELATED TO CURRENT SERVICES: **05 17 2011**

18. OUTSIDE LIFT: YES NO \$ CHARGES: **32654**

19. MEDICAL RELEASATION CODE: ORIGINAL REF. NO.

20. PRIOR AUTHORIZATION NUMBER: **32654**

21. FEDERAL TAX I.D. NUMBER: **12345**

22. PATIENT'S ACCOUNT NO. **12345**

23. ACCEPT ASSIGNMENT? YES NO

24. TOTAL CHARGE: **0.00**

25. AMOUNT PAID: **0.00**

26. BALANCE DUE: **0.00**

27. SIGNATURE OF PHYSICIAN OR SUPPLIER (INCLUDING ADDRESS OR CREDENTIALS)

28. SERVICE FACILITY LOCATION INFORMATION

29. BILLING PROVIDER INFO & PIN #

100 Browse

Here is an example of the preview for the Plain paper form. Use the tool bar at the top of the preview panel to Print, Close or Edit the Form .

If you make changes in this view, the information will be transferred back to the file as well.

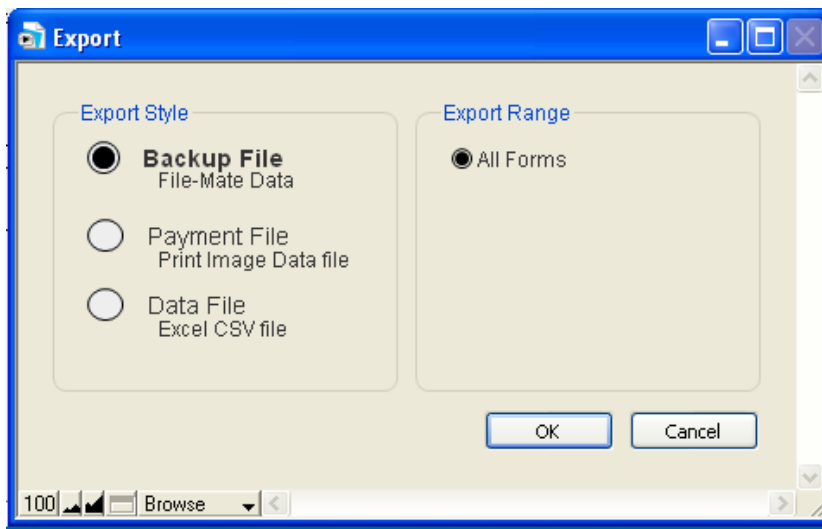
If you are printing **multiple forms** (you had clicked on selected forms or a date range), you can preview the forms by using the arrow buttons to scroll through them before printing.

Backing Up Data

To Make a Back up of your Data go to:

- **FILE** drop down menu
- Select **EXPORT**
- Click the **BACKUP FILE** radio button
- Click **Ok**
- The default location to save your back up file will come up automatically
C: FileMate/FM4/Archive
- Accept the default location and click **SAVE**.

Note: You may choose a location of your choice by re-directing the browser to the location you wish the backup file to be saved.

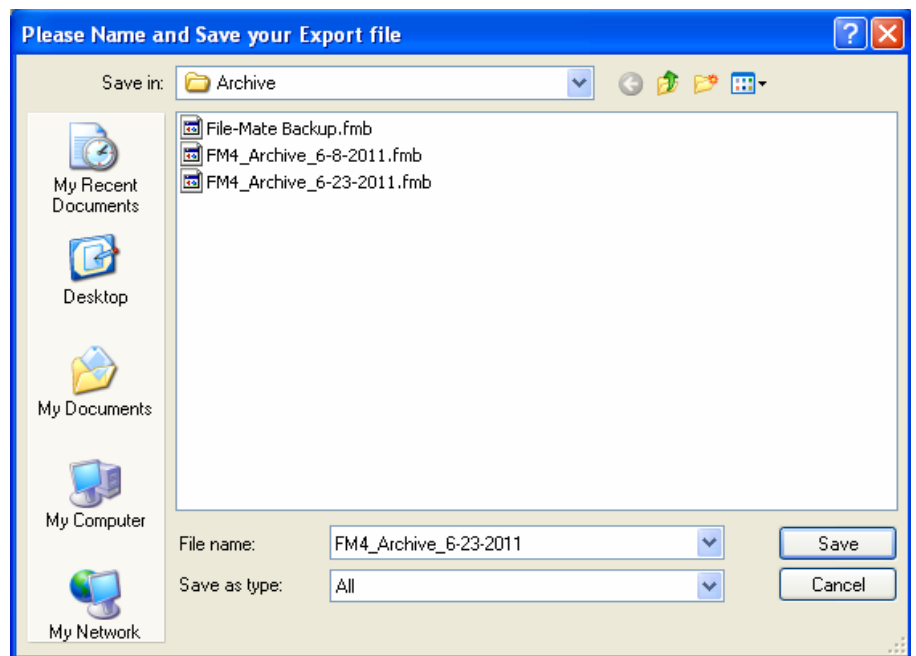


ARCHIVED DATA:

File-Mate 1500 v4 has a feature that automatically creates an archive of your files for the last 5 times that File-Mate was used.

If anything ever happens to your computer you will always have the last day's data automatically saved.

To learn more about recovering this data, see the **IMPORT DATA** section.



Export Data


For Purchasers of File-Mate 1500 Electronic Version Software

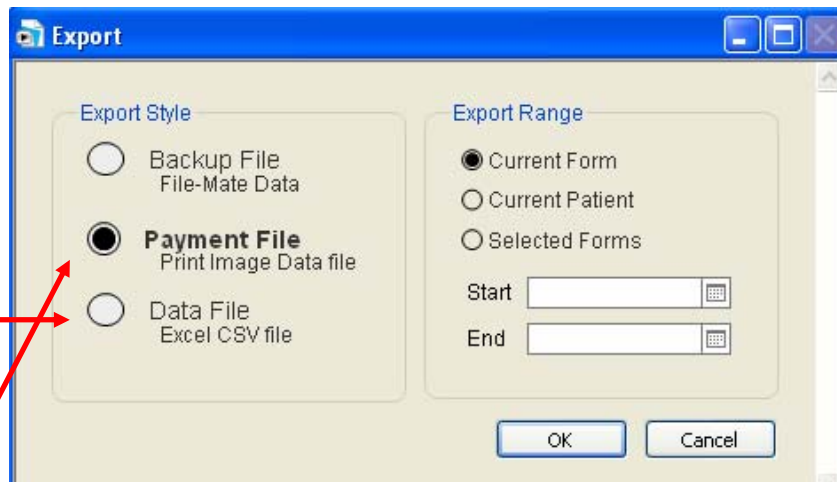
If you own the File-Mate 1500 Electronic Version of the software, you have the added ability to produce NSF data files for uploading to an online Clearing House that you have established a relationship with.

To Produce the NSF Data File:

From the Form list on the Home page,

- Select the form(s) you wish to export by clicking the open box on the same line(s) of the forms that you selecting.
- Once all form(s) have been selected, Click on FILE, EXPORT
- A Export Dialogue box will appear.

 Remember: Payment File is only available for Electronic Version.



- Select **Payment File** to create the Print Image Date File needed to transmit data to the Clearing House of your choice for electronic processing.

File-Mate 1500 creates a file that is often referred to as a “Print Image” file and is the most common file format accepted by most vendors.

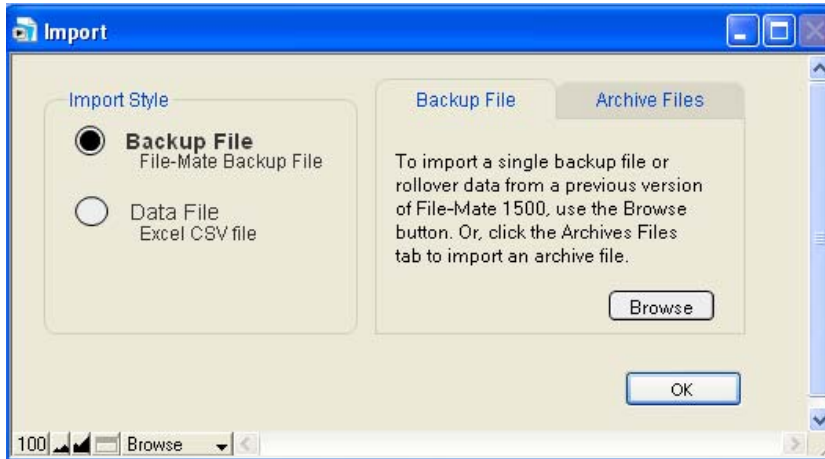
- Click **OK**. A file will then be created that you can now send to your clearing house.

DATA FILE OPTION

This option is primarily for users of previous versions (versions 1.0-3.0) to accommodate the creation of a “Legacy” file format. We expect this to be replaced with a more robust option in future releases of File-Mate 1500.

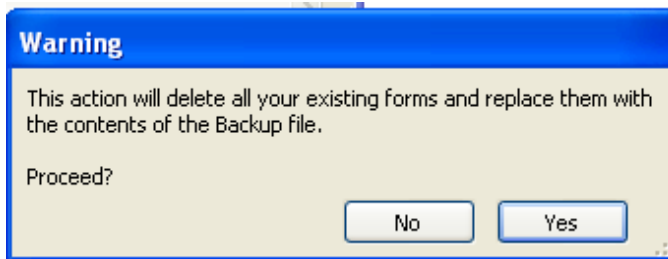
If you rely on this feature, contact us at support@formmagic.com to let us know so we can accommodate your needs in the future.

Import Data from Back-up

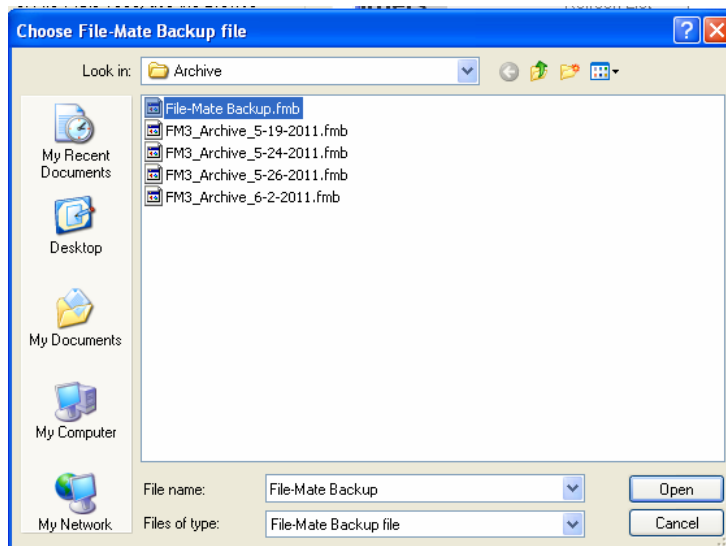


Import Data from a Back-up

- **FILE** Menu
- Select **IMPORT**
- Choose **BACKUP FILE**
- Click the **BROWSE** button



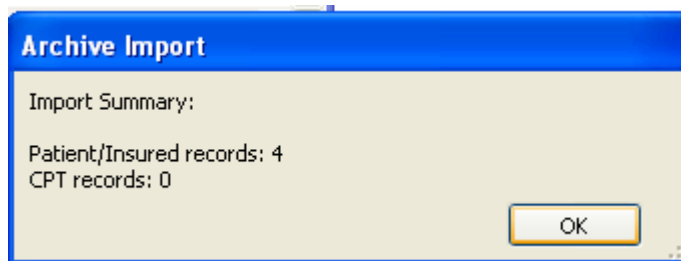
You will then receive a warning message. Click **YES** to proceed.



The default location for where you may have saved your back up file is now presented.

- **SELECT** the Backup File
- Click **OPEN**

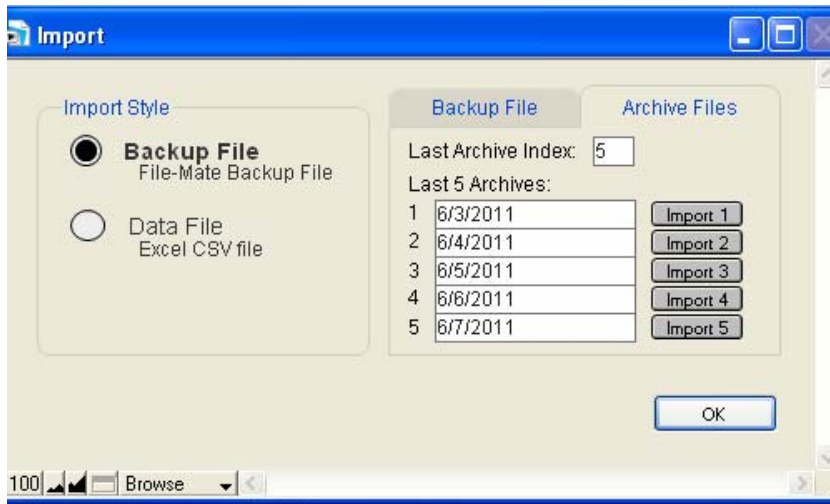
Note: You may need to navigate to the location you saved your back up file if you did not use the default location.



You will receive a Import Summary showing the number of records that were imported.

Click **OK** to finish the export.

Import Data from Archive



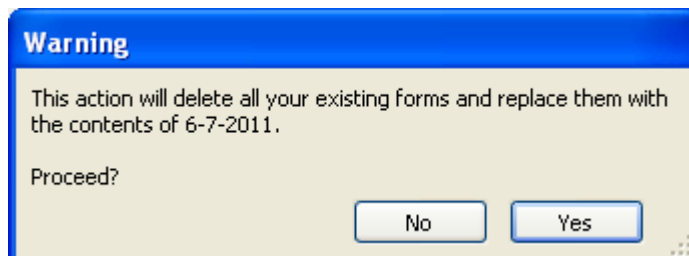
Import Data from an Archive

- **FILE** Menu
- Select **IMPORT**
- Choose **BACKUP FILE**
- Select the **ARCHIVE File** Tab
- Click the **IMPORT** button next to the date you want to bring in.

You will then receive a warning message.

Click **YES** to proceed.

This revert your data to the file data from the date you choose.

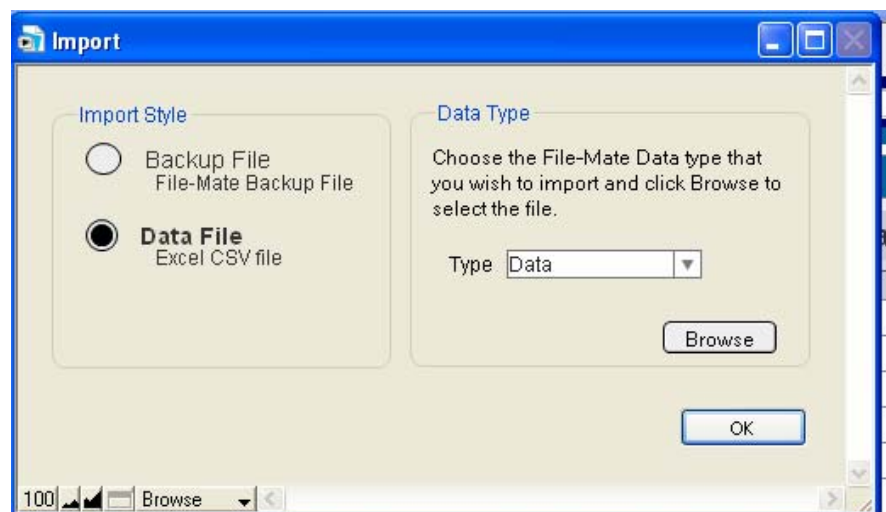


IMPORTING DATA FILE OPTION:

You can import:

Data - Patient Data
CPT Codes
ICD Codes

- **FILE**
- **IMPORT**
- **DATA FILE**
- Use drop down menu to **select type** of Data
- **BROWSE**
- **LOCATE** file and click **OK**



Invoices

Invoices are found under the FILE drop down Menu.

Print

Print Style

1500 Form
Prints to plain paper.

1500 Data
Prints to preprinted form

Invoice

Reports

Print Range

Current Form

Current Patient

Selected Forms

Date:

Start

End

Options

Terms:

Footer:

Preview OK Cancel

- **FILE**
- **PRINT**
- *Select INVOICE*
- *Choose your PRINT RANGE*
- *Enter Any Terms or Footer Notes*
- *Click PREVIEW Invoices if desired*
- *Click OK to print.*

Print

<< 1 of 2 >> Print... Close

Invoice

Invoice Date: 5/17/2011 Terms: Service Facility:

Bill To: Healthy, Susy, S
123 Main Ave
Anytown, FL 10000

Date(s) of Service	Description	Days/ Units	Charges

Outside Lab Charges	
Amount Paid	
Total	0.00

Printed On: 06/07/11, 1:28:56 pm



TIP: If you selected multiple forms, you can scroll through them in the PREVIEW mode by using these buttons.

Reports

Reports are found under the FILE drop down Menu.

Print Style

1500 Form
Prints to plain paper

1500 Data
Prints to preprinted form

Invoice

Reports

Print Range

Current Form

Current Patient

Selected Forms

Date:

Start

End

Options

Report: Patient

Patient Billing

Physician Billing

Preview OK Cancel

- **FILE**
- **PRINT**
- *Select* **REPORTS**
- *Choose* your **PRINT RANGE**
- *Select* Report Type under **OPTIONS**
- *Click* **PREVIEW** if desired
- *Click* **OK** to print.

Patient Billing Report << 1 of 1 >> Print... Close /2011

Patient	Account	Insured	Form Date	Status	Charges	Paid	Due	Payment	Balance
Healthy, Susy, S	12345	Healthy, Joe, A	5/19/2011	New	0	0	0	0	0

TIP:
If you selected multiple forms, you can scroll through them in the PREVIEW mode by using these buttons.

Moving File-Mate 1500 to a New Computer:

Before moving your software to another computer, if possible, back up your data.

To Make a Back up of your Data go to:

- **FILE** drop down menu
- Select **BACKUP FILE**
- Click **Ok**
- The default location to save your back up file will come up automatically
C: FileMate/FM4/Archive
You may want to save the backup directly onto a flash drive so you can move it to the new computer. If so, select the appropriate drive that your flash drive is in.
- Click **SAVE**.


Note: You may choose a location of your choice by re-directing the browser to the location you wish the backup file to be saved.

Once the Backup is complete:

Use your current installer to install the program on the new computer to ensure you have your original version. If you no longer have your installer, go to our website: <http://www.formmagic.com> and look in the updates section for installers. You can locate your current version from the Help Menu, About File-mate 1500.

Note: If you are not on the current 4.0 version, you may need a different installer if you are not interested in upgrading to the current version. Contact us at 888-746-0440 or support@formmagic.com for additional help.

Once you have installed the software on the new computer, import in the files by:

- Open the File-Mate program
- **FILE** Menu
- Select **IMPORT**
- Choose **BACKUP FILE**
- Click the **BROWSE** button to find your flash drive.
- You will then receive a warning message. 
- Click **YES** to proceed.
- **SELECT** the Backup File
- Click **OPEN**
- You will receive a Import Summary showing the number of records that were imported.
- Click **OK** to finish the export.

