

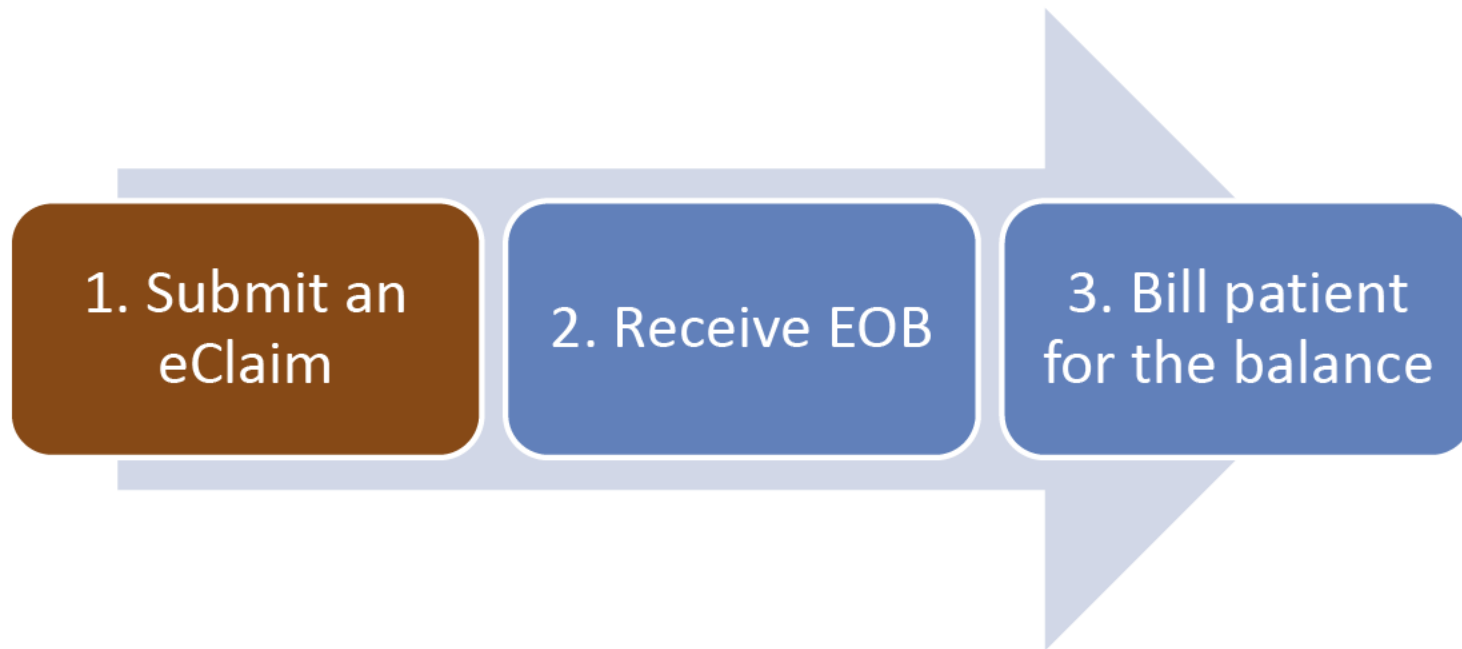


Create a claim to a group
benefit plan (eClaim)

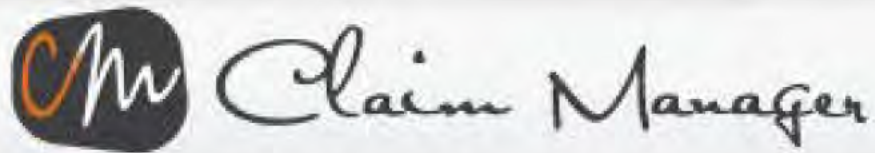
Acupuncture

You will learn

- The first step of billing the visit to a group benefit plan



Start by finding the patient



 [Dashboard](#)

Active Profile: **Acupuncture**



爱



JOAN AI (爱) **DOB:** 01/10/1950, **PHN:** 9671177549

Add New Patient

See All Patients

Check patient's profile


Patient Info






Patient Record for AI, JOAN  



PHN 9671 177 549	Birthdate (mm/dd/yyyy) 01/10/1950	<input type="button" value="Check MSP"/>	<input type="radio"/> Male <input checked="" type="radio"/> Female
First Name JOAN	Middle Name 	Last Name AI	Nickname 爱
Address #78-345 Main St.		City Vancouver	Prov. Postal Code BC V6J2G8
Email joanai@email.com	Phone (604) 236-5263	Phone 	Phone
<input type="button" value="Close"/>	<input type="button" value="Bill Visit"/>	<input type="button" value="Book"/>	

Full name, gender and birthday are mandatory for group benefits billing. Email address will enable you to email patient's invoices. Address is printed on the patient invoice.

Click on to create an eClaim

 [Dashboard](#) » [Patients](#) » **AI, JOAN** Active Profile: **Acupuncture Service**

Patient Info | Extended | Appt.  | MSP  | **eClaims ** | Private  | Notes 

Patient Record for AI, JOAN  

PHN <input type="text" value="9671 177 549"/>	Birthdate (mm/dd/yyyy) <input type="text" value="01/10/1950"/>	<input type="button" value="Check MSP"/>	<input type="radio"/> Male <input checked="" type="radio"/> Female
First Name <input type="text" value="JOAN"/>	Middle Name <input type="text"/>	Last Name <input type="text" value="AI"/>	Nickname <input type="text" value="爱"/>
Address <input type="text" value="#78-345 Main St."/>		City <input type="text" value="Vancouver"/>	Prov. <input type="text" value="BC"/> Postal Code <input type="text" value="V6J2G8"/>
Email <input type="text" value="joanai@email.com"/>	Phone <input type="text" value="(604) 236-5263"/>	Phone <input type="text"/>	Phone <input type="text"/>
<div><input type="button" value="Close"/> <input type="button" value="Bill Visit"/> <input type="button" value="Book"/></div>			

eClaims tab is for billing private insurance companies.

The eClaim is created in 3 steps

1. Enter insurance
plan details

A light blue downward-pointing arrow indicating the flow from step 1 to step 2.

2. Enter service
details

A light blue downward-pointing arrow indicating the flow from step 2 to step 3.

3. Select the payee

Step 1 – Enter insurance info

Patient Info	Extended	Appt. 	MSP 	eClaims 	Private 	Notes 
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New EP Claim for JOAN AI (Step 1 of 3: Extended Insurance Info)

Insured Member

Patient ▼

Insured Member's Name

JOAN AI

Benefit Type

Extended Health (▼)

Insurance Company

Great-West Life ▼

Policy Number

98657

Member ID

1245

Additional ID

Secondary Coverage?



No

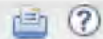


Yes

On step 1, enter the details of the patient's primary insurance plan as shown on the insurance card.

Click NEXT to go to STEP 2

New EP Claim for JOAN AI (Step 1 of 3: Extended Insurance Info)



Insured Member

Patient

Insured Member's Name

JOAN AI

Benefit Type

Extended Health

Insurance Company

Great-West Life

Policy Number

98657

Member ID

1245

Additional ID

Secondary Coverage?

☒ No

☐ Yes

Back

Next

Close

Status: Outstanding.

Step 2 – Enter service details

New EP Claim for JOAN AI (Step 2 of 3: Services/Products)  

Service Date 11/22/2016	Therapist Li Wei, R.Ac.	Service Location 32-654 Street	
Service Acupuncture	Duration 60	Fee 80.00	Less MSP 80.00

1.ZX.10.HA Acupuncture, multiple body sites using percutaneous (needle) approach

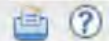
 Add Service



Select the service date, the visit duration and the fee. If you bill private plan after MSP, MSP benefit will be deducted from the fee in the 'Less MSP' field. Alternatively, you can select a service from the service catalog. Click on the red icon to open the catalog.

Click NEXT to go to STEP 3

New EP Claim for JOAN AI (Step 2 of 3: Services/Products)



Service Date

11/22/2016

Therapist

Li Wei, R.Ac.

Service Location

32-654 Street

Service

Acupuncture

Duration

60

Fee

80.00

Less MSP

80.00



1.ZX.10.HA Acupuncture, multiple body sites using percutaneous (needle) approach



Add Service

Back

Next

Close

Cancel

Step 3 – Select the payee

New EP Claim for JOAN AI (Step 3 of 3: Coordination of Benefits)

Payable to

Practitioner

Insured Member

Practitioner

Clinic

Prescription Authorization signed

☐ Benefit Assignment signed

Accident Type

N/A

Accident Date

Prescriber Type



N/A


First Name

Last Name


Select who will receive the insurance payment: you or the patient. If you select 'patient', bill the patient the full fee after you submit the claim. If you select 'practitioner', bill the patient only for the uninsured balance. Claim Manager will calculate the balance for you.

Click SUBMIT to submit the eClaim


New EP Claim for JOAN AI (Step 3 of 3: Coordination of Benefits)  

Payable to
Practitioner 

☒ Electronic Transmission Authorization signed ☒ Benefit Assignment signed

Accident Type
N/A 

Accident Date

Prescriber Type
N/A 

First Name

Last Name

Back

Submit

Get Estimate

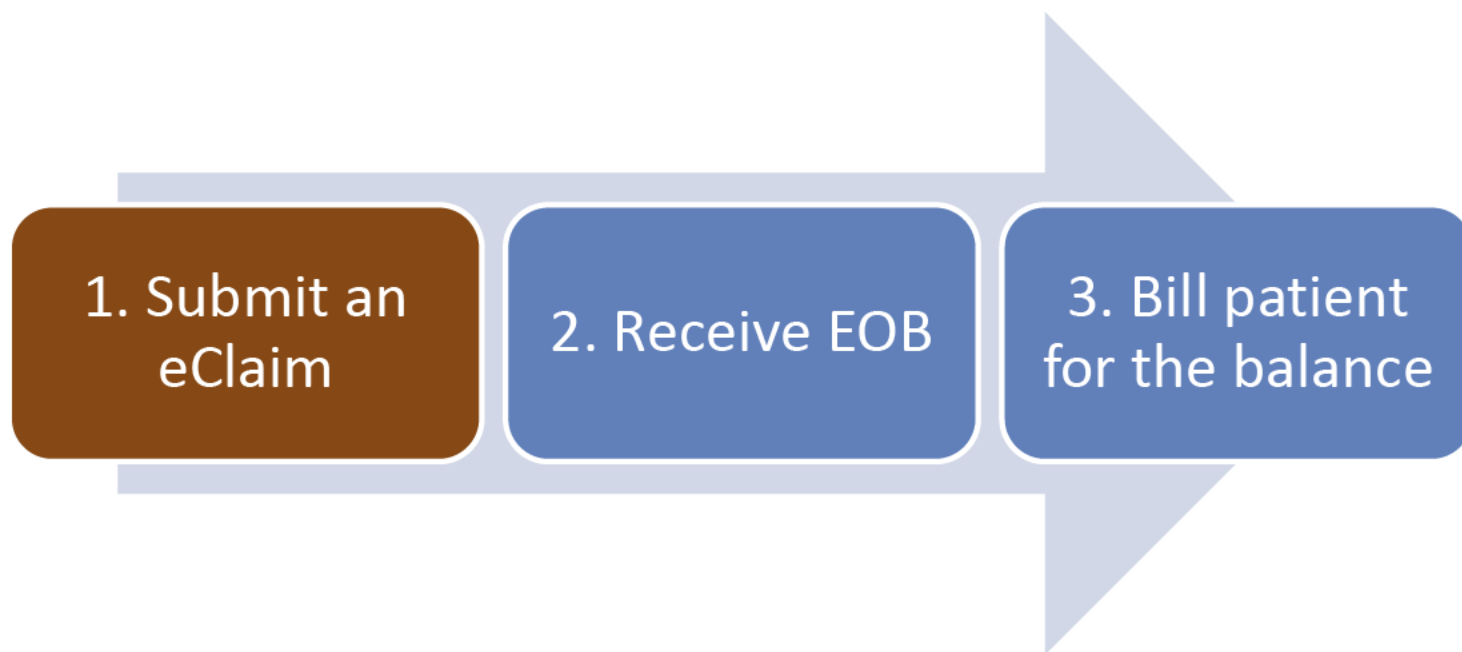
Close

Cancel

Status: Record is not saved

You've learned

- The first step of billing the visit to a group benefit plan – How to submit an eClaim



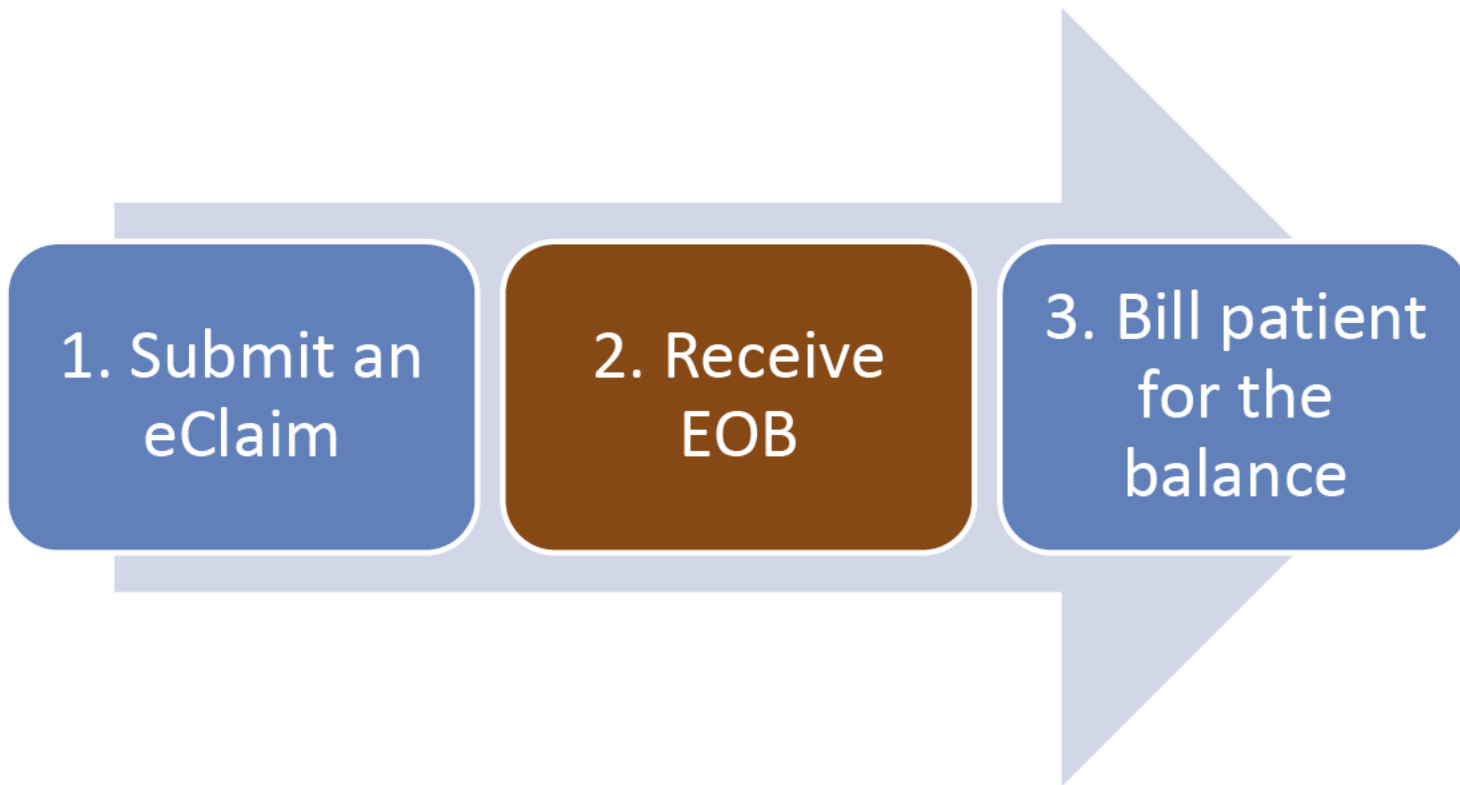
To submit an eClaim

- Enter the claim's information in 3 steps
 - the group benefit plan details
 - the service details
 - the payee
- Click Submit to submit a claim to a group benefit plan in real time



Learn Next

- How to receive an Explanation of Benefits



Start your trial today

- www.claimmanager.ca
- info@claimmanager.ca
- 604-626-9903

