

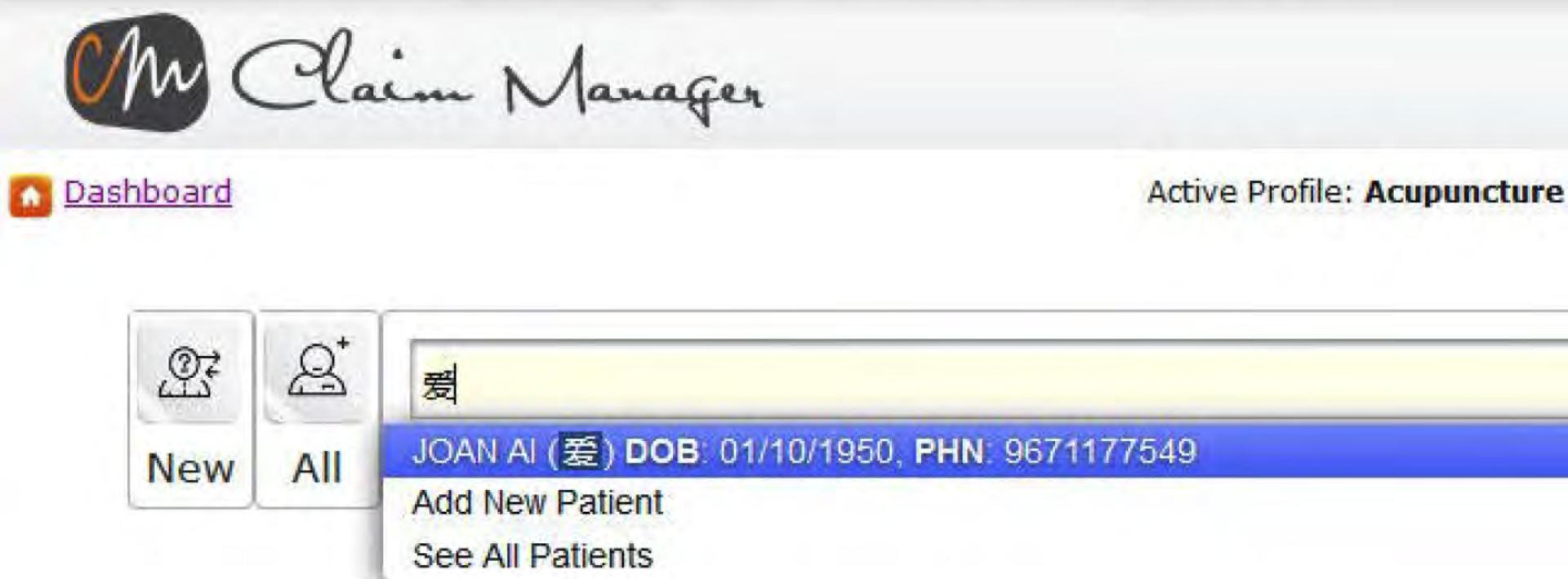


Create a claim to a group  
benefit plan (eClaim)

Acupuncture



# Start by finding the patient



The screenshot shows the Claim Manager software interface. At the top, there is a logo consisting of a stylized 'CM' in orange and black, followed by the text 'Claim Manager' in a cursive font. Below the logo, there is a navigation bar with a house icon and the text 'Dashboard'. To the right of the navigation bar, it says 'Active Profile: Acupuncture'. On the left, there are two buttons: 'New' (with a person icon) and 'All' (with a person icon and a plus sign). On the right, a search result is displayed for 'JOAN AI (爰) DOB: 01/10/1950, PHN: 9671177549'. Below this result, there are two links: 'Add New Patient' and 'See All Patients'.

Active Profile: Acupuncture

New All

JOAN AI (爰) 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 愛
Address #78-345 Main St.	City Vancouver	Prov. BC	Postal Code V6J2G8
Email joanai@email.com	Phone (604) 236-5263	Phone	Phone

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 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. BC	Postal Code V6J2G8
Email joanai@email.com	Phone (604) 236-5263	Phone	Phone

eClaims tab is for billing private insurance companies.

# The eClaim is created in 3 steps

1. Enter insurance  
plan details

2. Enter service  
details

3. Select the payee

# Step 1 – Enter insurance info



## 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: (empty)

Secondary Coverage?  No  Yes

**Next** (button highlighted with a red box)

Back Close

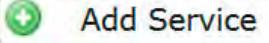
Status: Outstanding.

# 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
 <span style="border: 2px solid red; padding: 2px;">A magnifying glass icon inside a square frame, indicating a search function.</span>			

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

 Next

Back 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

tion 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) Print  ? 

Payable to Practitioner  

[Electronic Transmission Authorization](#) signed  [Benefit Assignment](#) signed

Accident Type N/A  

Accident Date  

Prescriber Type N/A  

First Name  

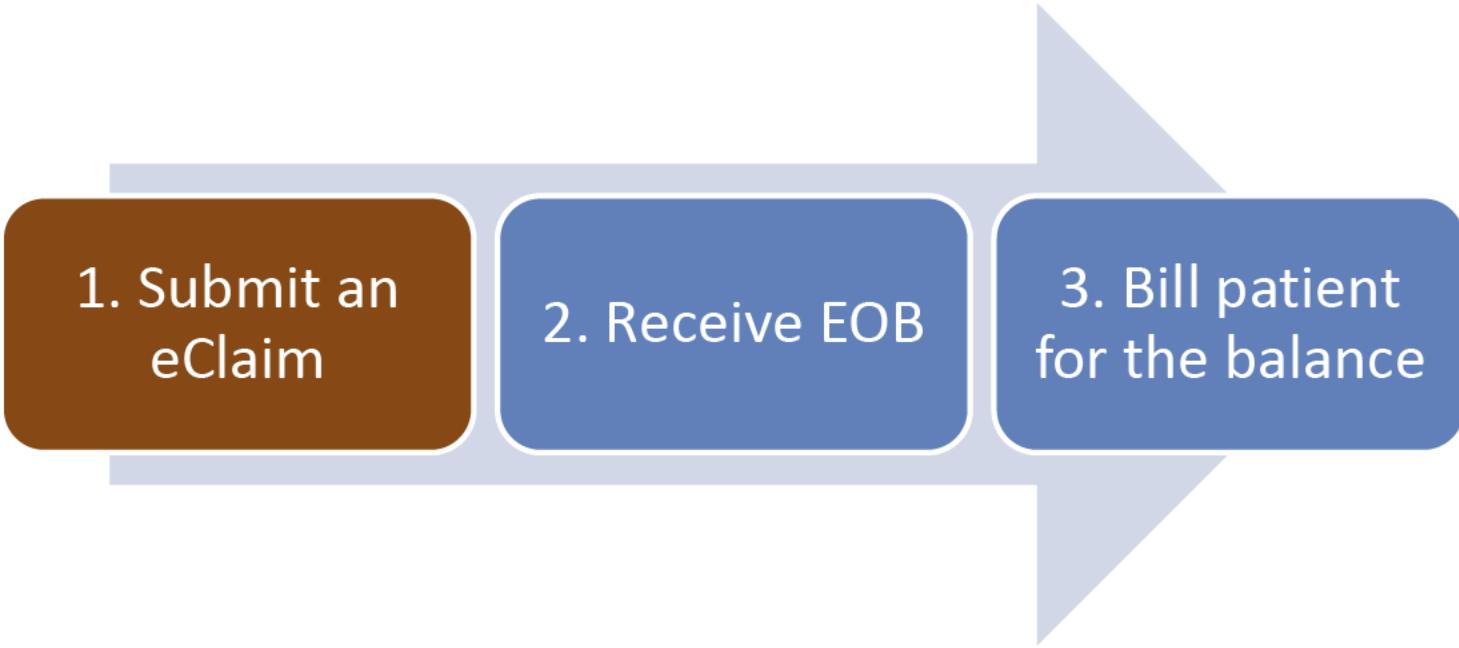
Last Name  

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



1. Submit an eClaim

2. Receive EOB

3. Bill patient for the balance

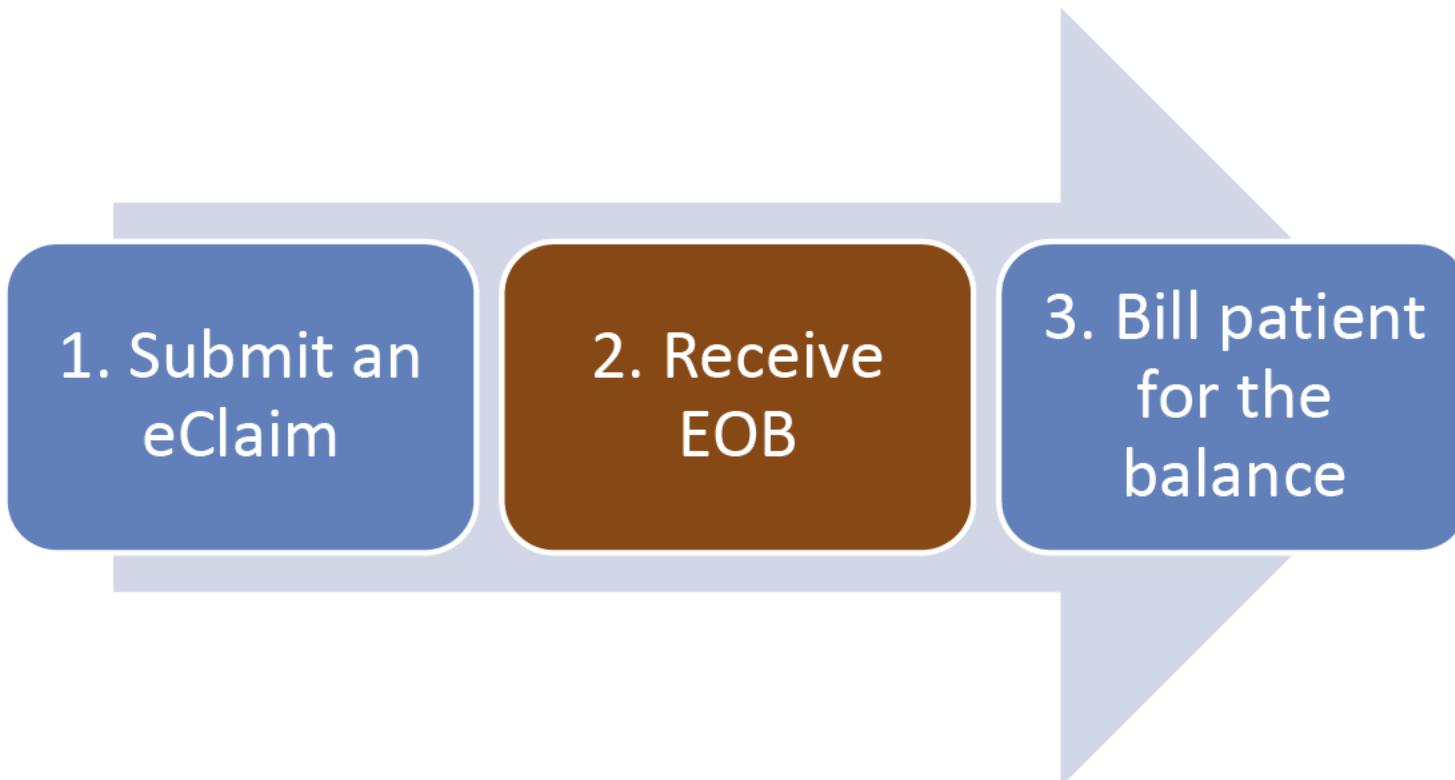
# To submit an eClaim

- 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](http://www.claimmanager.ca)
- [info@claimmanager.ca](mailto:info@claimmanager.ca)
- 604-626-9903

