

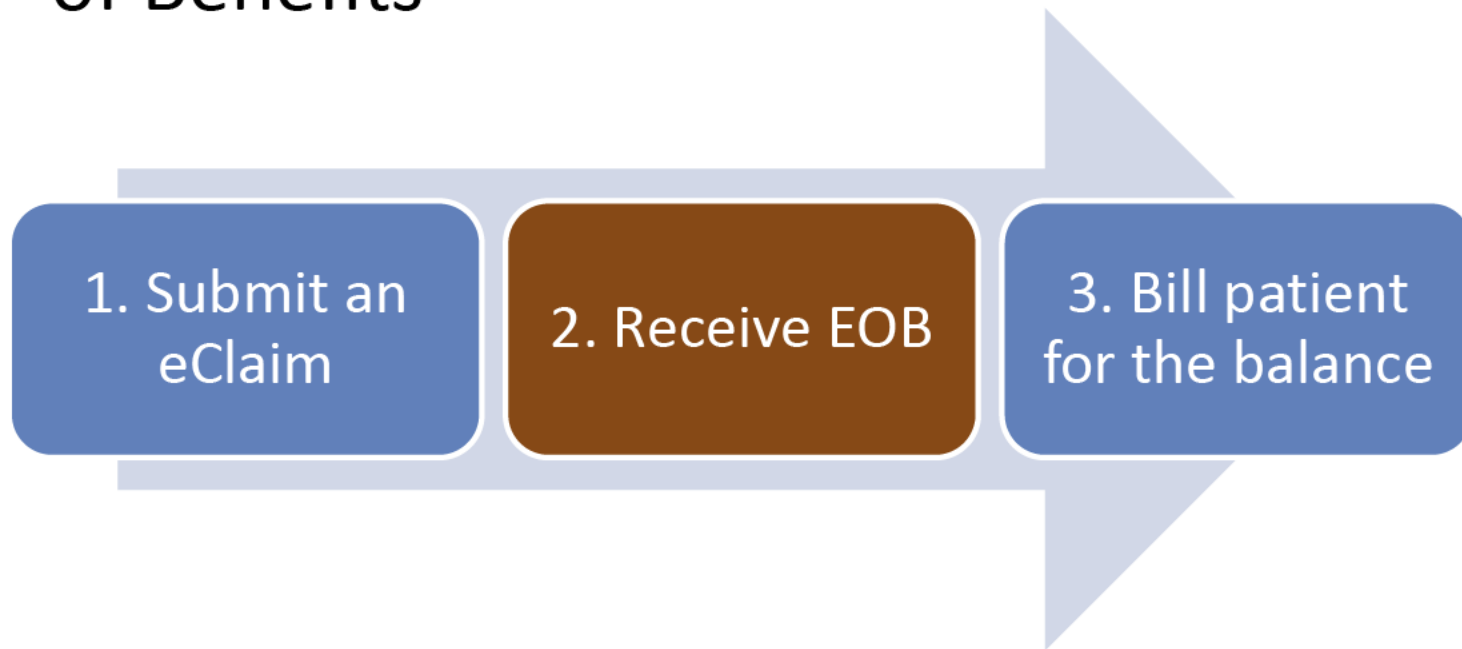


# How to receive an Explanation of Benefits

Acupuncture

# You will learn

- The 2<sup>nd</sup> step of billing the visit to a group benefit plan – How to receive an Explanation of Benefits



# You will learn

- What happens after you click Submit button
- How to read a summary billing report
- How to open the EOB and email it to the patient
- How to find the unpaid amount

# After you click Submit...

**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 receive a **real-time** summary report

Patient Info

Extended

Appt.

MSP

eClaims

Private

Notes

EP Claim No TP0000147 for JOAN BING (Step 1 of 3: Extended Insurance Info)

Extended Plan Billing Report

You received Explanation of Benefits # [3879](#)

Billed	\$60.00
Paid	\$15.00
Payee	Wei, Li
Patient owes	\$45.00

Bill Patient

Close

Back

Next

Void

Close

Clone Record

Status: [Accepted](#).  
**Billed:** \$60.00 **Paid:** \$15.00 **Payee Name:** Wei, Li

# The summary report shows

- How much is paid
- Who is the payee
- The amount owed by the patient
- The link to the EOB

**Extended Plan Billing Report** ✕

You received Explanation of Benefits # [3879](#)

Billed	<b>\$60.00</b>
Paid	<b>\$15.00</b>
Payee	<b>Wei, Li</b>
Patient owes	<b>\$45.00</b>

Bill PatientClose

# To open the EOB, click on its number

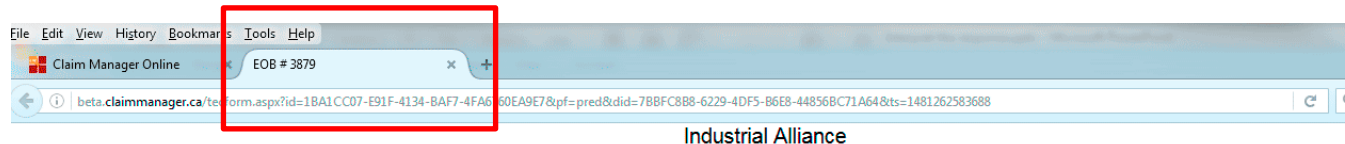
**Extended Plan Billing Report** ✕

You received Explanation of Benefits [# 3879](#)

Billed	\$80.00
Paid	\$15.00
Payee	TripleTee, Laura
Patient owes	\$65.00

Bill PatientClose

# EOB opens in a new Internet browser tab



Industrial Alliance

## Explanation of Benefits

**Servicing Provider:** Li Wei, R.Ac.  
**Servicing Location ID:** 123456

**Licence ID:** 98754

**Insurance Company Claim ID:** 3879  
**Policy:** 8767986 (Extended Healthcare)  
**Insured/Member:** JOAN BING

**Member ID:** 8758  
**Date of Birth:** 1950-01-10

**Patient:** JOAN BING  
**Relationship to Insured/Member:** Insured Member

**Date of Birth:** 1950-01-10

**Provider Claim Reference ID:** TP0000147

**Date Submitted:** 2016-12-08

Date of Service	Service Description	Submitted	Eligible	Deductible	Payable At	Paid Amount	Note(s)
2016-12-01	Acupuncture - 60 min	60.00	15.00		100%	15.00	
	<b>Totals:</b>	<b>60.00</b>				<b>15.00</b>	

**Expected Payment Date:** Unavailable  
**Total Payable To:** Servicing Provider  
**Payee Name:** Wei, Li  
**Payee Address:** 100-200 Main Rd.  
Richmond, BC V7A 3V9

### Note(s):

IF YOU HAVE ANY QUESTIONS, PLEASE CALL THE INSURER AT 1-800-222-4444.




The information contained on this form has been used to process your claim electronically. Please verify the accuracy of this data and report any discrepancies. Do not mail this form to the Insurer/Plan administrator.



# Click on the button to email EOB to the patient

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Industrial Alliance



**Explanation of Benefits**

**Servicing Provider:** Li Wei, R.Ac.  
**Servicing Location ID:** 123456

**Insurance Company Claim ID:** 3879  
**Policy:** 8767986 (Extended Healthcare)  
**Insured/Member:** JOAN BING

**Patient:** JOAN BING  
**Relationship to Insured/Member:** Insured Member

**Licence ID:** 98754  
**Member ID:** 8758  
**Date of Birth:** 1950-01-10  
**Date of Birth:** 1950-01-10

**Provider Claim Reference ID:** TP0000147

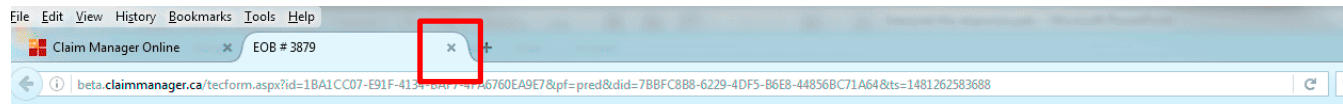
**Date Submitted:** 2016-12-08

Date of Service	Service Description	Submitted	Eligible	Deductible	Payable At	Paid Amount	Note(s)
2016-12-01	Acupuncture - 60 min	60.00	15.00		100%	15.00	
	<b>Totals:</b>	<b>60.00</b>				<b>15.00</b>	

**Expected Payment Date:** Unavailable  
**Total Payable To:** Servicing Provider  
**Payee Name:** Wei, Li  
**Payee Address:** 100-200 Main Rd.  
Richmond, BC V7A 3V9

The email button is hidden if no email is entered in the patient's profile.

# Close EOB and return to CM



Industrial Alliance

## Explanation of Benefits

**Servicing Provider:** Li Wei, R.Ac.  
**Servicing Location ID:** 123456

**Licence ID:** 98754

**Insurance Company Claim ID:** 3879  
**Policy:** 8767986 (Extended Healthcare)  
**Insured/Member:** JOAN BING

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Date of Service	Service Description	Submitted	Eligible	Deductible	Payable At	Paid Amount	Note(s)
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Richmond, BC V7A 3V9

### Note(s):

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# Check the unpaid amount

The screenshot shows the 'Claim Manager' software interface. At the top, there's a logo and the text 'Claim Manager'. Below it, a navigation bar shows 'Dashboard » Patients » BING, JOAN'. On the right, it says 'Active Profile: Acupur'. A row of tabs includes 'Patient Info', 'Extended', 'Appt.', 'MSP', 'eClaims', 'Private', and 'Notes'. The main content area is titled 'EP Claim No TP0000147 for JOAN BING (Step 1 of 3: Extended Insurance Info)'. A modal window titled 'Extended Plan Billing Report' is open, displaying the following information:

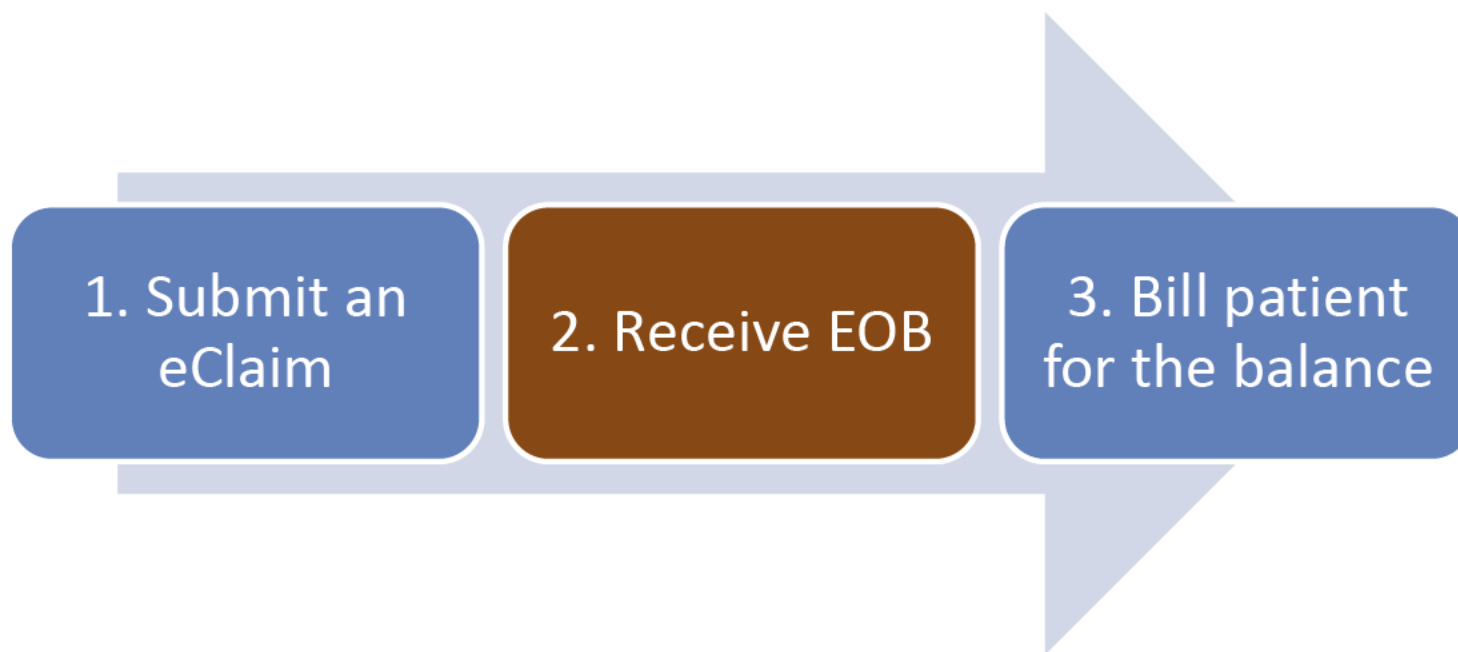
You received Explanation of Benefits # <a href="#">3879</a>	
Billed	\$60.00
Paid	\$15.00
Payer	Wei. Li
Patient owes	\$45.00

At the bottom of the modal, there are two buttons: 'Bill Patient' and 'Close'. The 'Patient owes' row in the table is highlighted with a red rectangular box.

If the insurer does not cover 100% of your fees, create a patient invoice for the balance.

# You've learned

- The 2<sup>nd</sup> step of billing the visit to a group benefit plan – How to receive an EOB

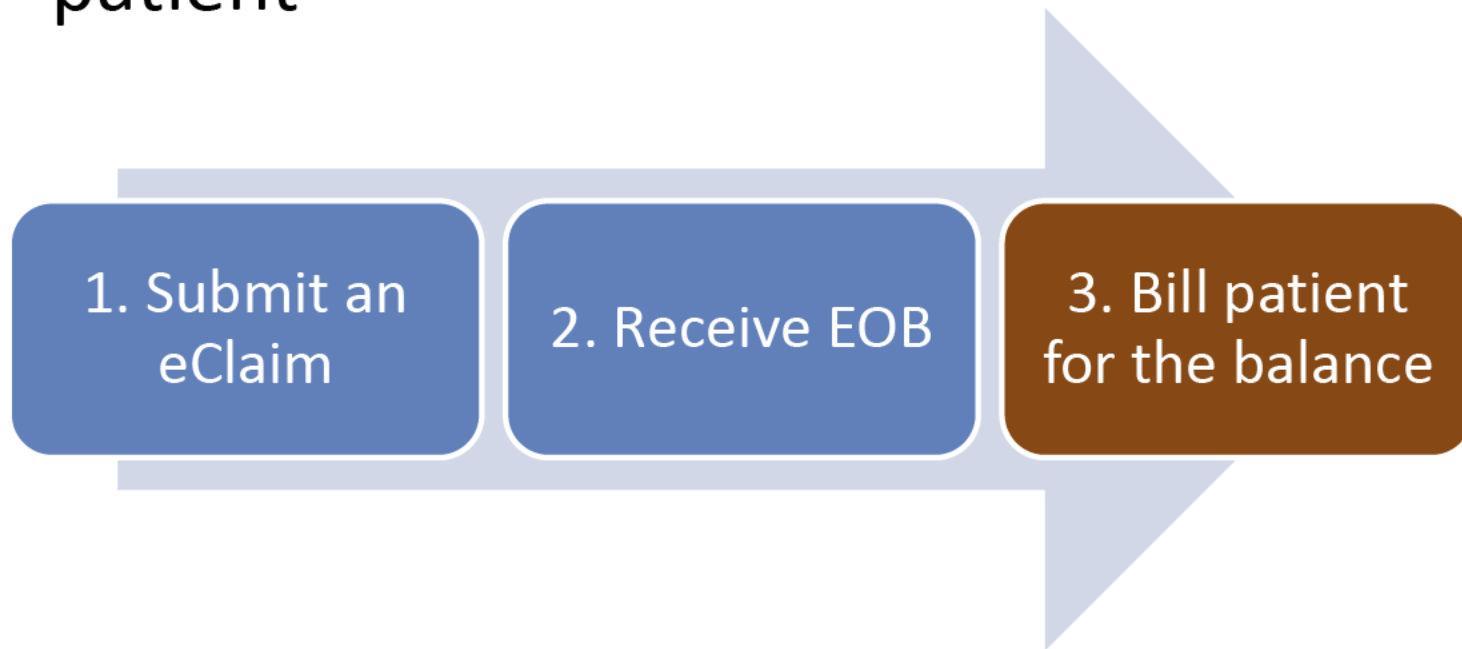


# To receive an EOB

- Click Submit
- Wait for the billing report in real-time
- Open the EOB and email it to the patient
- Return to CM to find the unpaid amount

# Learn next

- The 3rd step of billing the visit to a group benefit plan – How to bill the balance to the patient



# Start your trial today

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

