

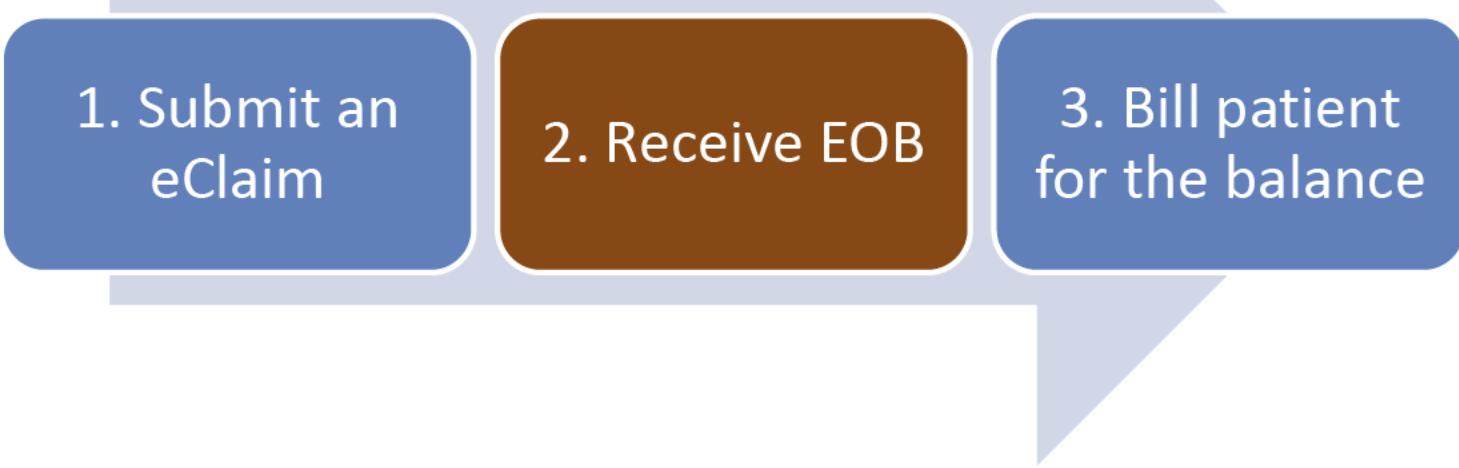


How to receive an Explanation of Benefits

Acupuncture

You will learn

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



1. Submit an eClaim

2. Receive EOB

3. Bill patient for the balance

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) 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

Submit Get Estimate Close Cancel

Status: Record is not saved

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

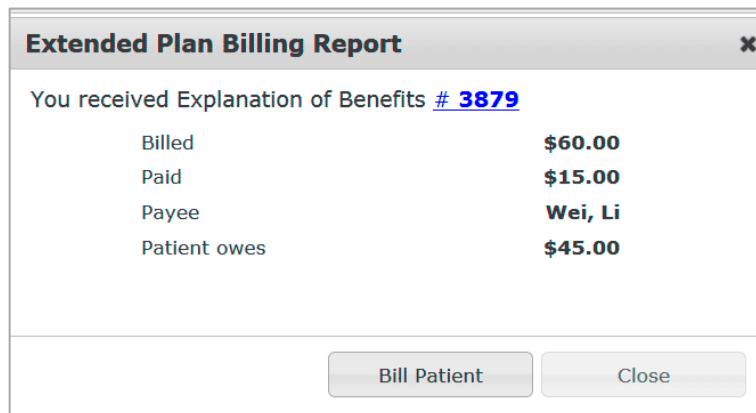
The screenshot shows a software interface for managing medical claims. At the top, there is a navigation bar with tabs: Patient Info, Extended, Appt. (with a green plus icon), MSP (with a green plus icon), eClaims (with a green plus icon), Private (with a green plus icon), and Notes (with a green plus icon). Below the navigation bar, a header displays the text: "EP Claim No TP0000147 for JOAN BING (Step 1 of 3: Extended Insurance Info)". A modal window titled "Extended Plan Billing Report" is open in the center. The modal contains the following information:
You received Explanation of Benefits # 3879

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

At the bottom of the modal are two buttons: "Bill Patient" and "Close". Below the modal, there are five buttons: "Back", "Next", "Void", "Close", and "Clone Record". At the very bottom, a status message is displayed: "Status: Accepted." and "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



To open the EOB, click on its number



EOB opens in a new Internet browser tab



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	
	Totals:	60.00				15.00	

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

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



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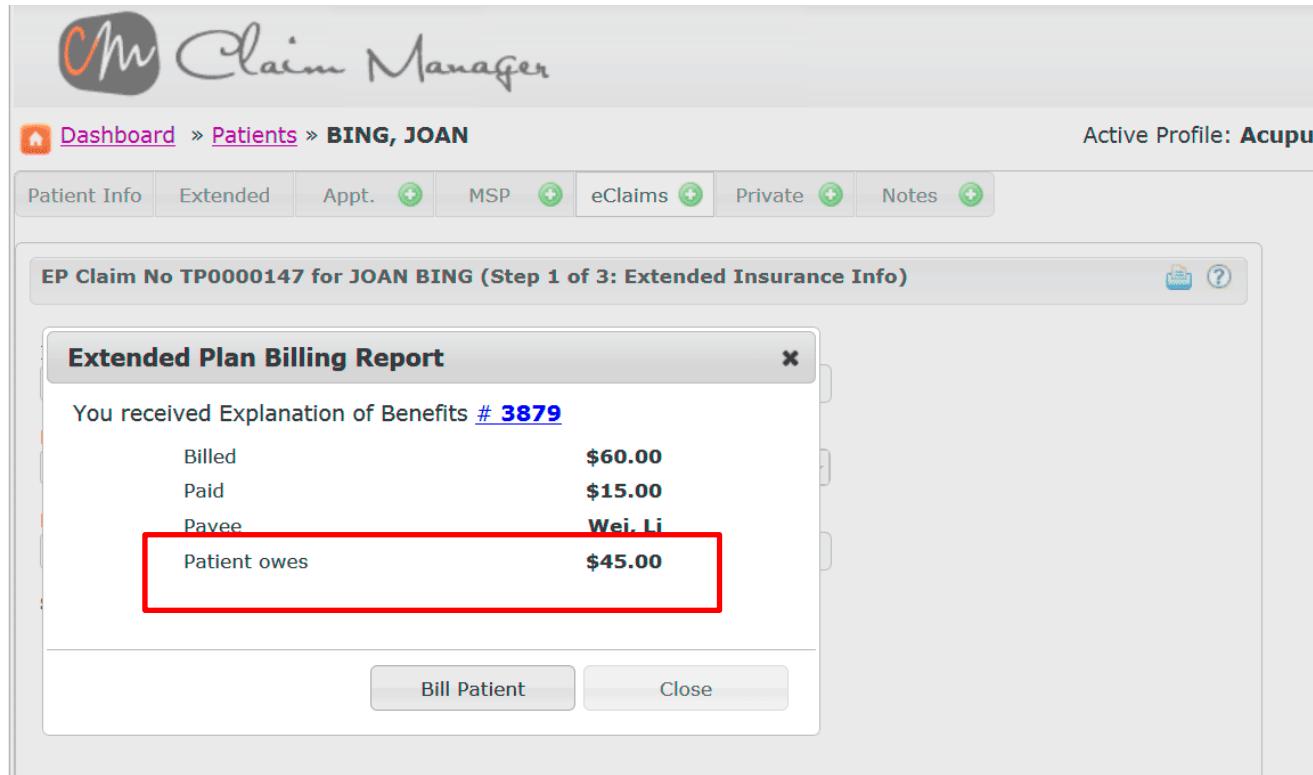
Expected Payment Date: Unavailable
Total Payable To: Servicing Provider
Payee Name: Wei, Li
Payee Address: 100-200 Main Rd.
Richmond, BC V7A 3V9

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Check the unpaid amount



CM Claim Manager

Dashboard » Patients » BING, JOAN Active Profile: Acupur

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 X

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

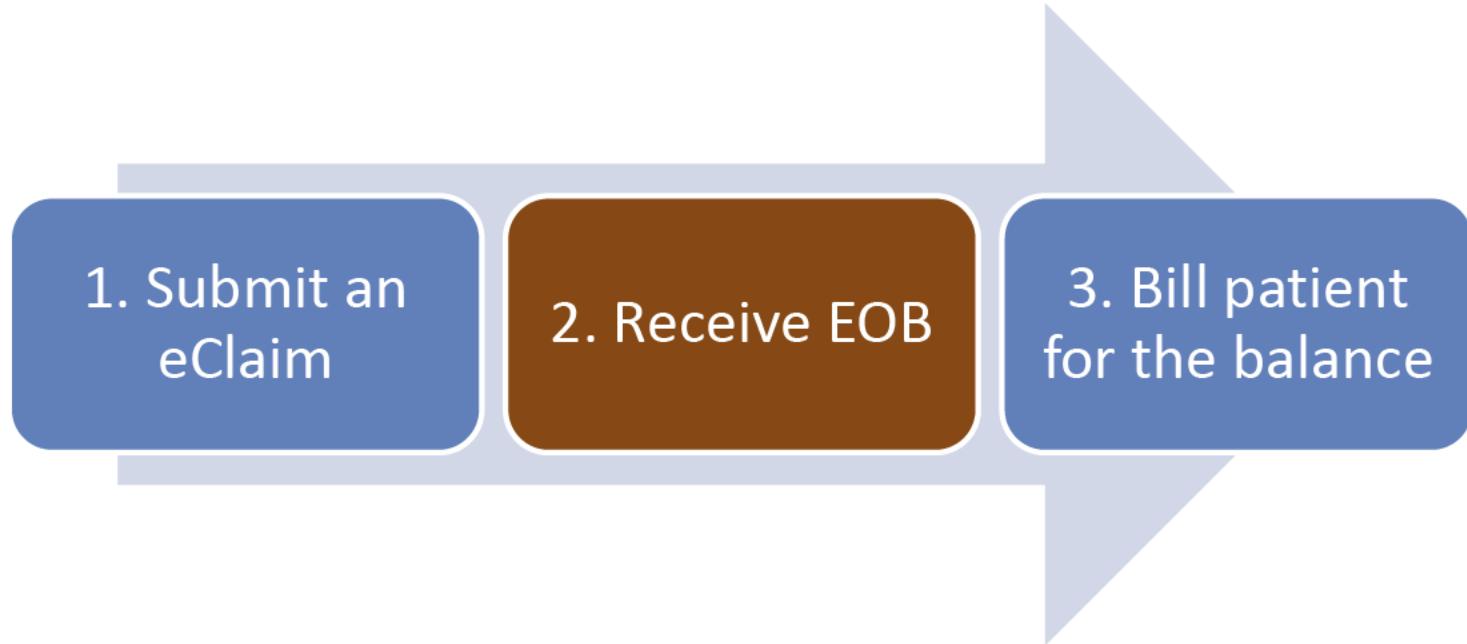
Billed	\$60.00
Paid	\$15.00
Pavée	Wei, Li
Patient owes	\$45.00

[Bill Patient](#) [Close](#)

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

You've learned

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

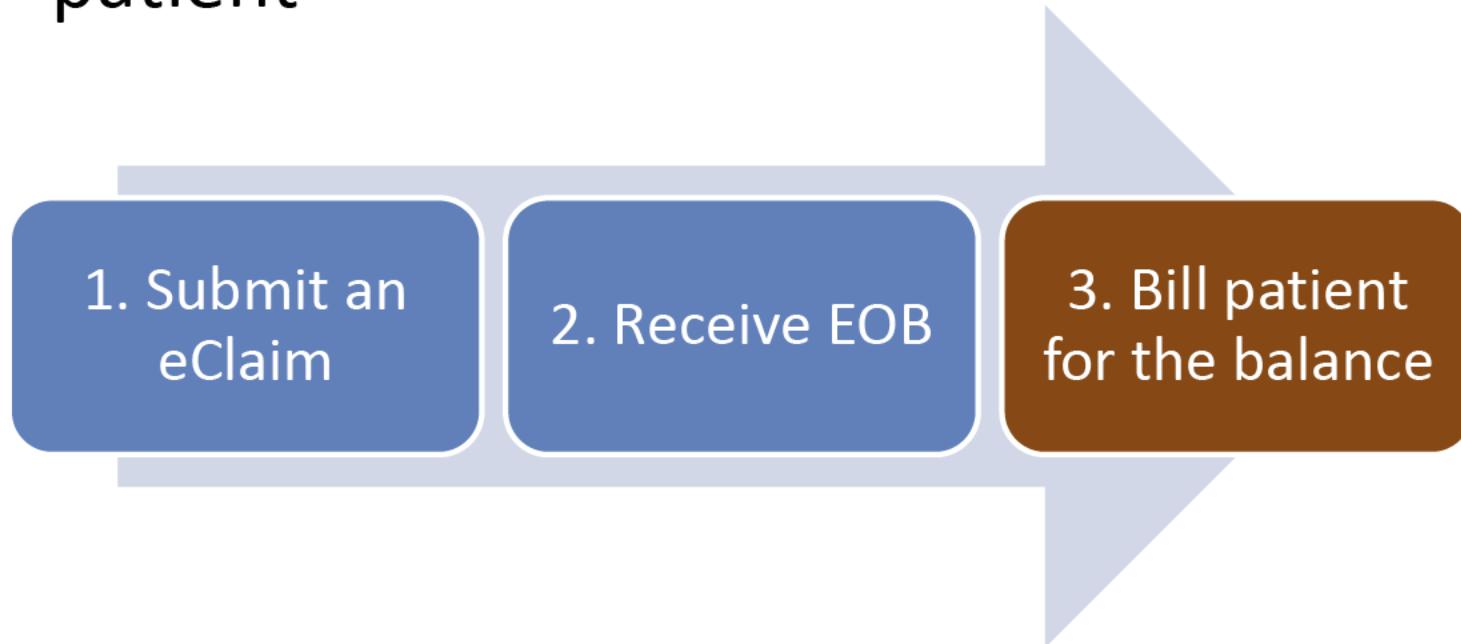


To receive an EOB

- 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

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- 604-626-9903

