

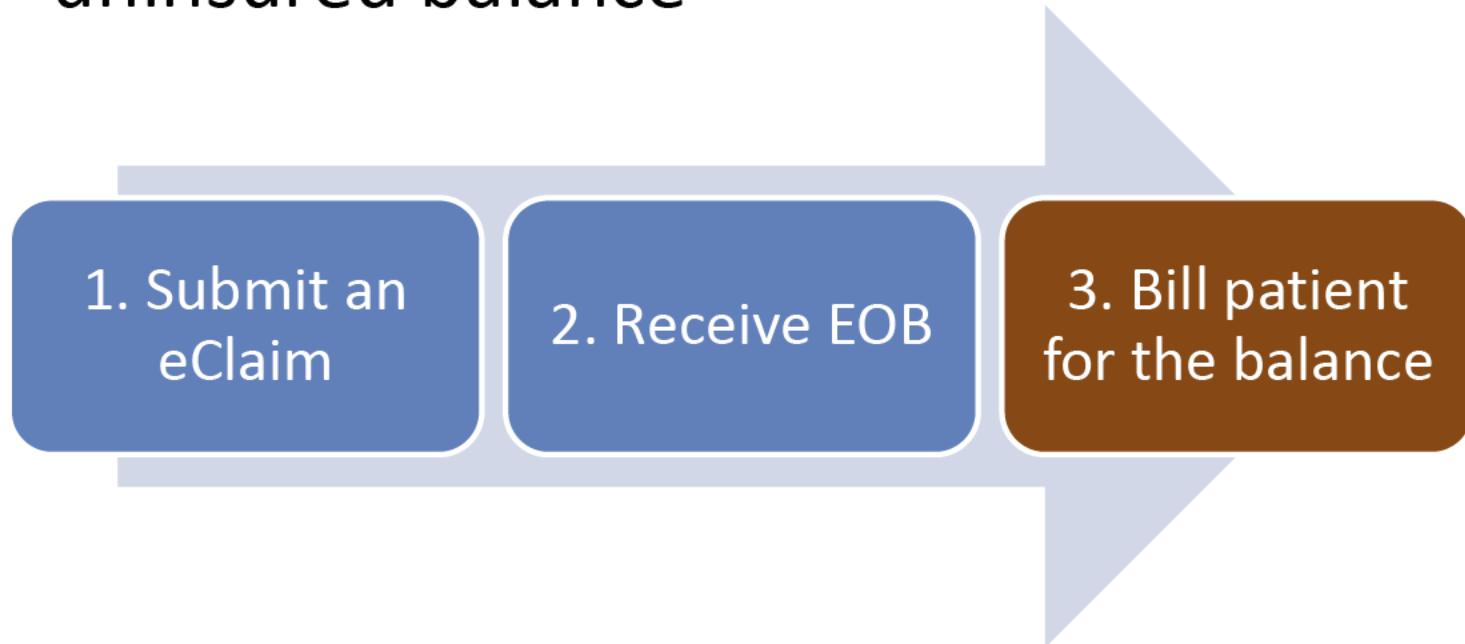


Create a patient invoice  
to collect the uninsured balance

Acupuncture

# You will learn

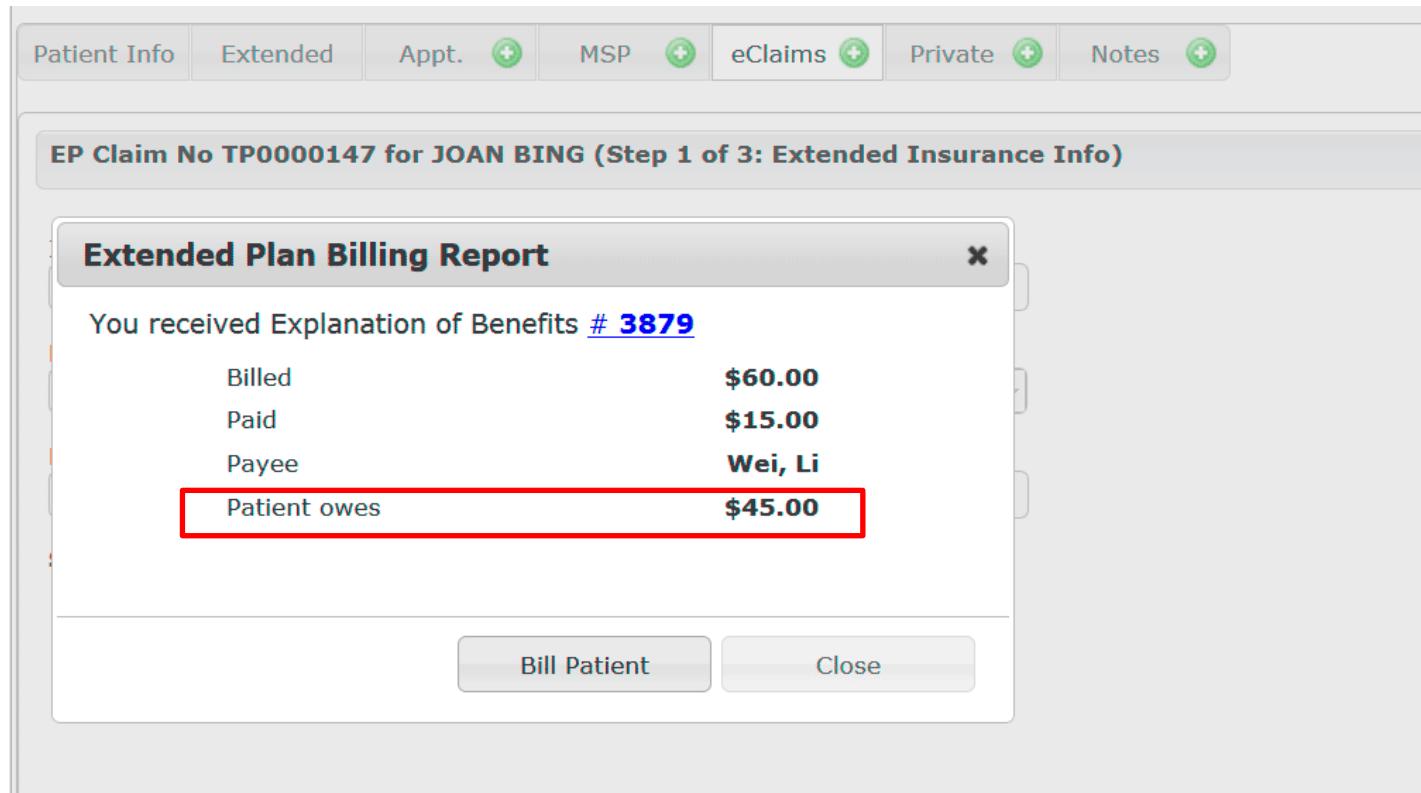
- The 3<sup>rd</sup> step of billing the visit to a group benefit plan – How to bill the patient for the uninsured balance



# You will learn

- How to find the unpaid balance and the Bill Patient button
- How to create the invoice
- How to email the invoice to the patient

# Find the amount owed by the patient



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** ×

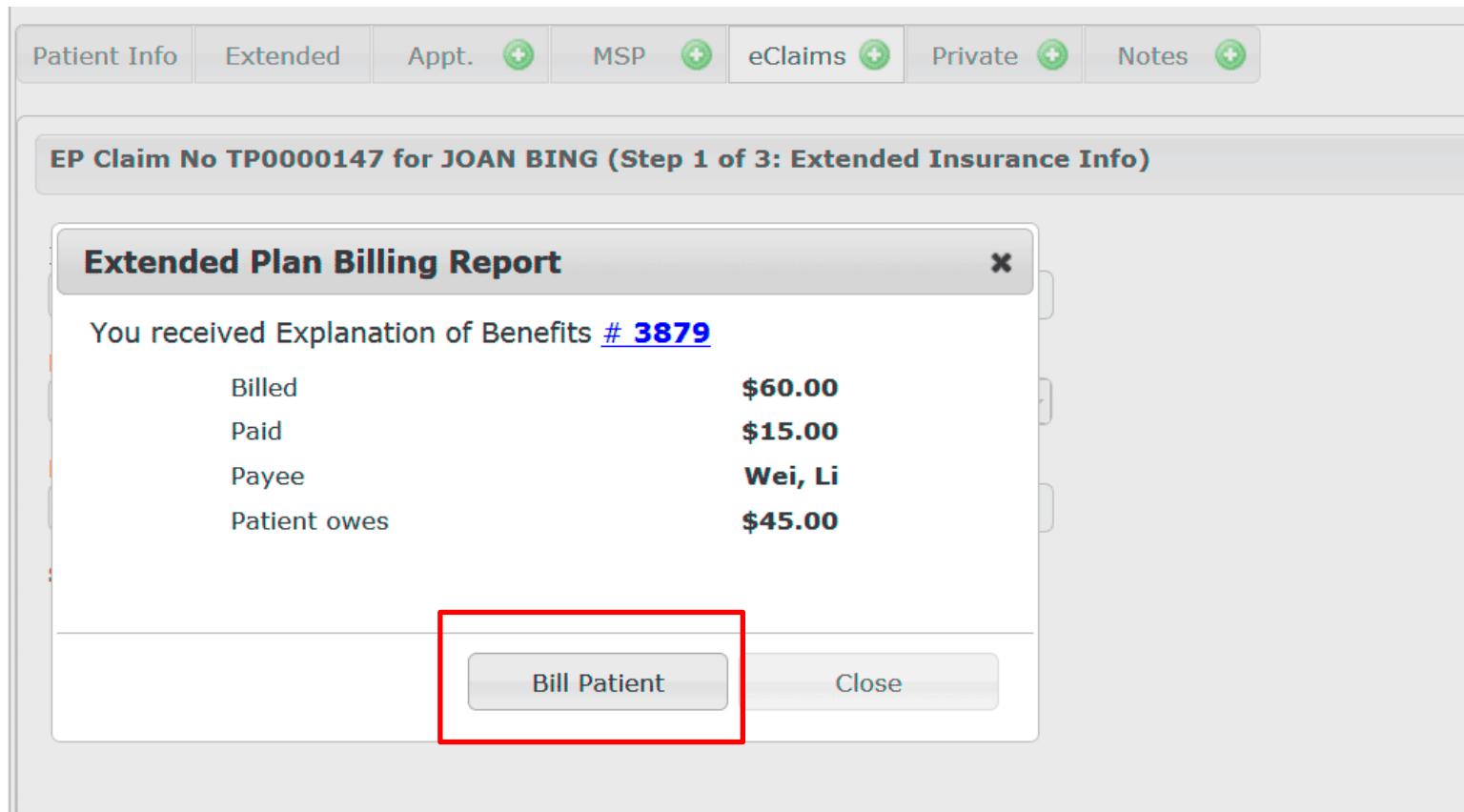
You received Explanation of Benefits # **3879**

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

**Bill Patient** **Close**

CM calculates the amount owed by the patient based on the payee of the insurance benefits and the amount paid. The uninsured balance shown on the summary report.

# Click Bill Patient to create a patient invoice



If you click Close, the transaction is aborted. No patient invoice will be created.

# Enter the payment details

Dashboard » Patients » AI, JOAN      Active Profile: Acupuncture Service      English 中文

Patient Info   Extended   Appt.   MSP   eClaims   Private   Notes   X

Patient Invoice #P000000773 for AI, JOAN    

Service Date 11/22/2016	Therapist Li Wei, R.Ac.	Service eClaims Balance	Standard Fee 65.00
Appointment N/A	User Fee 65.00	GST 0.00	PST 0.00
Payment Date 11/22/2016	Paid By Cash	Last Digits	Fee Total 65.00
Comments   			

 The 'Payment Date' and 'Paid By' fields are highlighted with a red box.

Print   Close   

The button 'Bill Patient' opens a new invoice master. The billed amount is already calculated. Enter only the payment details and an optional comment . The comment is shown on the invoice.

# Click Print to create an invoice

Dashboard » Patients » AI, JOAN      Active Profile: Acupuncture Service      English 中文

Patient Info   Extended   Appt. +   MSP +   eClaims +   Private +   Notes +   X

**Patient Invoice #P000000773 for AI, JOAN**   Print   ?

Service Date 11/22/2016	Therapist Li Wei, R.Ac.	Service eClaims Balance	Standard Fee 65.00
Appointment N/A	User Fee 65.00	GST 0.00	PST 0.00
Payment Date 11/22/2016	Paid By Cash	Last Digits	Fee Total 65.00
Comments   			
<span style="border: 2px solid red; padding: 2px 10px;">Print</span> <span style="border: 1px solid #ccc; padding: 2px 10px;">Close</span>		<span style="border: 1px solid #ccc; padding: 2px 10px;">Delete</span>	
Issued. Paid. eClaim # <a href="#">TP0000076</a> EOB # <a href="#">3879</a>			

Click Print to create the invoice. The printed invoice is considered officially issued and cannot be changed. If issued with an error, create it anew.

# The invoice opens in a new tab

Claim Manager Online Invoice # P000000773

beta.claimmanager.ca/printform.aspx?id=61D2EA54-01E4-4262-BBD0-142BA2E6FCB1|22F03625-1015-4260-9AA1-6912882E9B70|5E3EC31F

Search Print Print Preview Print PDF Email

Patient

Spring Wellness  
100-200 Main Rd. Richmond, BC  
V7A 3V9

P: (604) 211-0123  
F: (604) 211-4567

---

JOAN AI  
#78-345 Main St. Vancouver BC  
V6J 2G8

Li Wei, R.Ac.  
MSP practitioner #12345  
College licence #98754

Invoice Number: P000000773  
Date: 11/22/2016

No.	Description	Amount	Comment
1	ACUPUNCTURE, 60 min	80.00	
	Extended Health benefit Great-West Life	-15.00	Accepted

---

Present Charges: 65.00  
Payment: 65.00  
paid on 11/22/2016  
Cash

Outstanding Balance: 0.00

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Printed on 12/11/2016

# Click on Email button to email it



Springfield Wellness & Healthcare  
100-2000 Third Rd. Springfield, BC  
V7A3V9

(604) 211-0123  
(604) 211-4567

JOAN AI  
#78-345 Main St.  
V6J2G8

Li Wei, R.Ac.  
MSP practitioner #12345  
College licence #98787

Invoice Number: P000000773  
Date: 11/22/2016

No.	Description	Amount	Comment
1	ACUPUNCTURE, 60 min	80.00	
	Extended Health benefit Great-West Life	-15.00	Accepted

Present Charges: 65.00

Payment: 65.00

paid on 11/22/2016

Cash

Outstanding Balance: 0.00

Click on the email button to email the invoice to the patient. The button appears only if you entered an email address into the patient profile.

# Close the Invoice tab and return to CM

Claim Manager Online \* +

beta.claimmanager.ca/printform.aspx?id=61D2EA54-01E4-4262-BBD0-1428A2E6FCB1|22F03625-1015-4260-9AA1-6912882E9B70|5E3EC31F C Search

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**Spring Wellness**  
100-200 Main Rd. Richmond, BC  
V7A 3V9 P: (604) 211-0  
F: (604) 211-4

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**JOAN AI**  
#78-345 Main St. Vancouver BC  
V6J 2G8 Invoice Number  
Date: 11/22/20

**Li Wei, R.Ac.**  
MSP practitioner #12345  
College licence #98754

No.	Description	Amount	Com
1	ACUPUNCTURE, 60 min	80.00	
	Extended Health benefit Great-West Life	-15.00	Accepted

Present Charges: 65.00

# Close the invoice master

 [Dashboard](#) » [Patients](#) » **AI, JOAN**

Active Profile: **Acupuncture Service**

English 

Patient Info	Extended	Appt. 	MSP 	eClaims 	Private 	Notes 	X
<b>Patient Invoice #P000000773 for AI, JOAN</b>  							
Service Date 11/22/2016	Therapist Li Wei, R.Ac.	Service eClaims Balance 		Standard Fee 65.00			
Appointment N/A	User Fee 65.00	GST 0.00	PST 0.00	Fee Total 65.00			
Payment Date 11/22/2016	Paid By Cash	Last Digits		Paid Amount 65.00			
Comments   							
Print	<b>Close</b>						
Issued. Paid. eClaim # <a href="#">TP0000076</a> EOB # <a href="#">3879</a>							

# See the invoice appear in the Private tab

Dashboard » Patients » AI, JOAN      Active Profile: Acupuncture Service      English 中文

Patient Info    Extended    Appt.     MSP     eClaims     Private     Notes     

Patient Pay Visits for AI, JOAN

Date	Office Number	Service	Charged	Owes	Status	Edit	Delete
12/01/2016	P000000821	Acupressure	70.00	0.00	Paid		
11/29/2016	P000000823	Acupuncture	37.00	0.00	Paid		
11/22/2016	P000000773	eClaims Balance	65.00	0.00	Paid		
11/17/2016	P000000832	eClaims Balance	57.00	57.00	Not Paid		
11/12/2016	P000000836	eClaims Balance	57.00	57.00	Not Paid		
11/08/2016	P000000837	eClaims Balance	80.00	80.00	Draft		
11/03/2016	P000000808	eClaims Balance	42.00	0.00	Paid		
10/13/2016	P000000617	EP Visit Balance	3.00	0.00	Paid		

10    Page 1 of 1  Displaying 1 to 8 of 8 items

You can access the past invoices at any time.

# Click on the Dashboard to exit the record

 *Claim Manager*      Welcome [Li Wei, R.Ac.](#)

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

Patient Info	Extended	Appt.	MSP	eClaims	Private	Notes	X
<b>Patient Pay Visits for AI, JOAN</b>							
<a href="#">New Private Invoice</a>		<a href="#">Collect Declined MSP</a>		<a href="#">Print</a> <a href="#">?</a>			
Date	Office Number	Service	Charged	Owes	Status	Edit	Delete
12/01/2016	P000000821	Acupressure	70.00	0.00	Paid		
11/29/2016	P000000823	Acupuncture	37.00	0.00	Paid		
11/22/2016	P000000773	eClaims Balance	65.00	0.00	Paid		
11/17/2016	P000000832	eClaims Balance	57.00	57.00	Not Paid		
11/12/2016	P000000836	eClaims Balance	57.00	57.00	Not Paid		
11/08/2016	P000000837	eClaims Balance	80.00	80.00	Draft		
11/03/2016	P000000808	eClaims Balance	42.00	0.00	Paid		
10/13/2016	P000000617	EP Visit Balance	3.00	0.00	Paid		

10 ▾       Page 1 of 1          Displaying 1 to 8 of 8 items

# You can start your next transaction

 **Claim Manager**

Welcome Li Wei, R.Ac.

Active Profile: **Acupuncture Service** [English 中文](#)

 [Dashboard](#)   

 [New](#)  [All](#) [Find Patient](#) [Find Claim](#)

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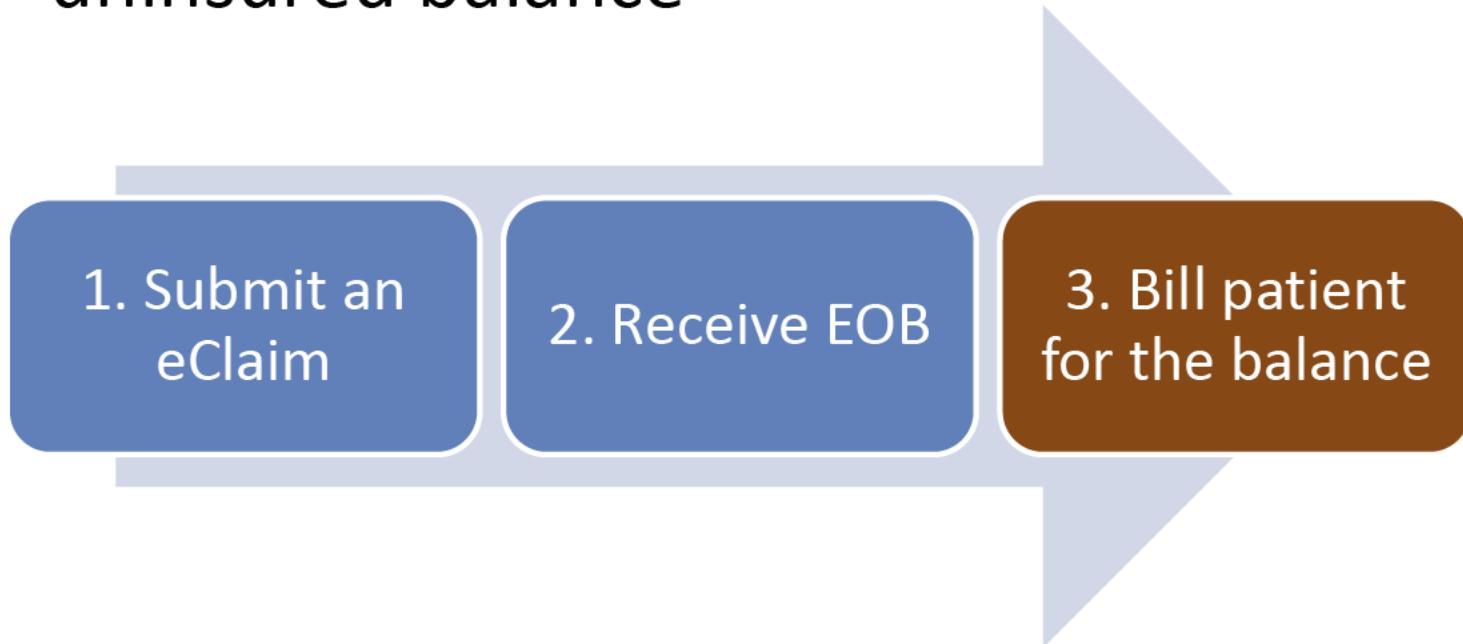


**Invoice Counters**

<u>Total</u>	158	
<u>In Process</u>	20	
<u>Accepted</u>	13	
<u>Declined</u>	0	
<u>Private</u>	99	
<u>Drafts</u>	0	
<u>Outstanding</u>	26	

# You've learned

- The 3<sup>rd</sup> step of billing the visit to a group benefit plan – How to bill the patient for the uninsured balance



# To bill the unpaid balance to the patient

- Click on the Bill Patient button after you received an EOB
- Enter payment details
- Email the invoice to the patient
- Close the patient's record

# Start your trial today

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

