

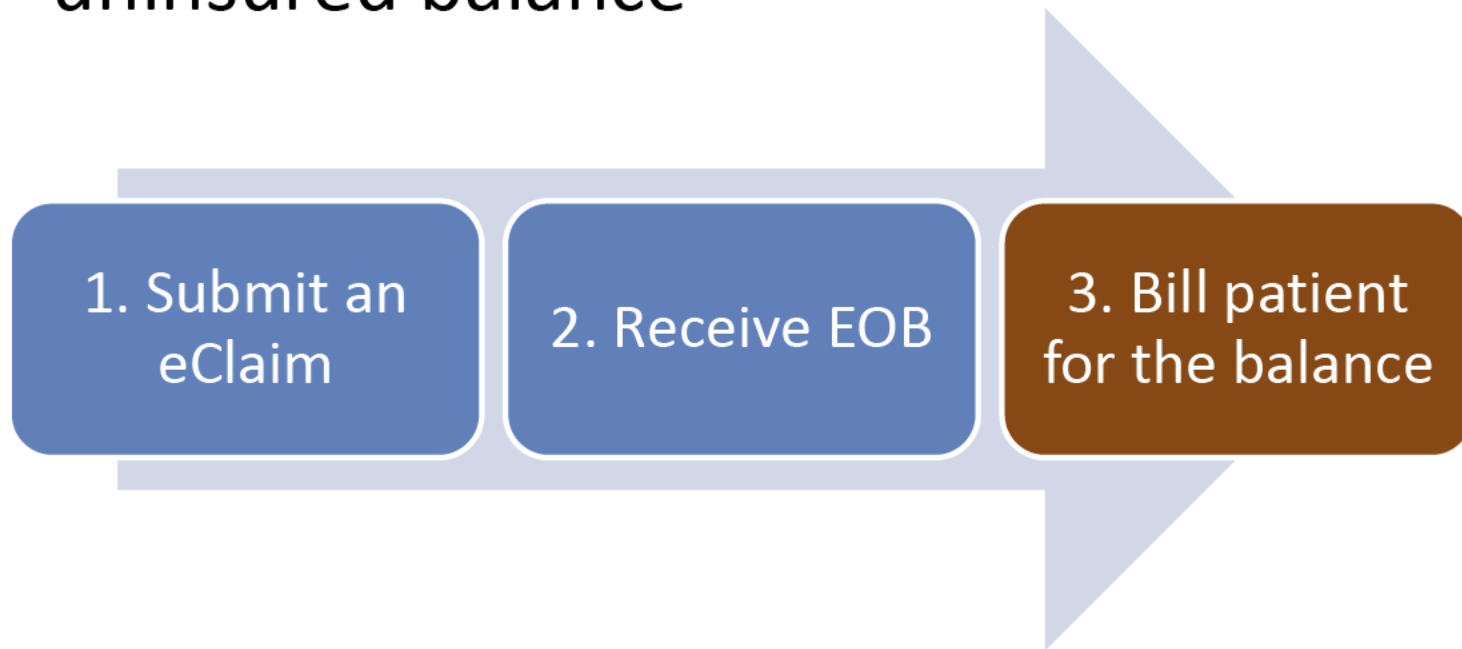


Create a patient invoice
to collect the uninsured balance

Acupuncture

You will learn

- The 3rd 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 x

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

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

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

The screenshot shows a software interface with a top navigation bar containing tabs: Patient Info, Extended, Appt. (+), MSP (+), eClaims (+), Private (+), and Notes (+). Below the navigation bar, a header indicates 'EP Claim No TP0000147 for JOAN BING (Step 1 of 3: Extended Insurance Info)'. A modal dialog box titled 'Extended Plan Billing Report' is open, displaying 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 dialog box, there are two buttons: 'Bill Patient' (which is highlighted with a red rectangular box) and 'Close'.




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






Comments








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

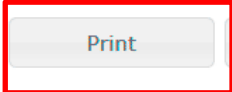
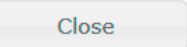

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Patient Info Extended Appt.  MSP  eClaims  Private  Notes  X

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	Fee Total 65.00
Payment Date 11/22/2016	Paid By Cash 	Last Digits <input type="text"/>	Paid Amount 65.00	

Comments

Issued. Paid. eClaim # [TP00000076](#) EOB # [3879](#)

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

Patie

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

Disclaimer and Confidentiality Note: This document is strictly confidential and intended solely for the use by authorized clinic staff members. Disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.
Printed on 12/11/2016

Click on Email button to email it



Spriengfield Wellness & Healthcare
100-2000 Third Rd. Spriengfield, 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

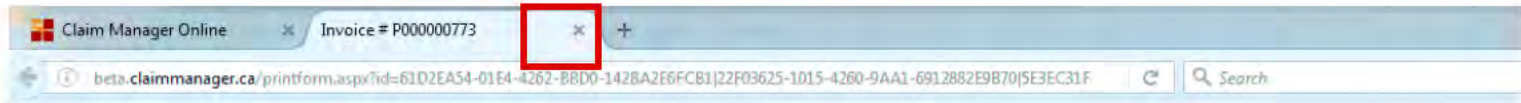
Present Charges: 65.00

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



Pa

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

P: (604) 211-0
F: (604) 211-4

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

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

Invoice Number
Date: 11/22/20

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

Present Charges:

65.00

Close the invoice master



[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

Fee Total

65.00

Payment Date

11/22/2016

Paid By

Cash

Last Digits

Paid Amount

65.00

Comments


Print






Close







Issued. **Paid.** eClaim # [TP0000076](#) EOB # [3879](#)

















See the invoice appear in the Private tab




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

Patient Pay Visits for AI, JOAN

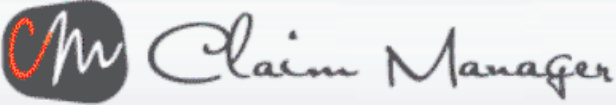
 New Private Invoice  Collect Declined MSP  

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

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

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

Patient InfoExtendedAppt. MSPeClaimsPrivateNotes

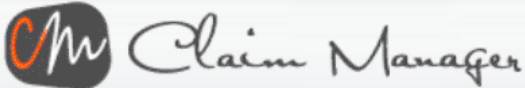


Patient Pay Visits for AI, JOAN

[+ New Private Invoice](#) [+ Collect Declined MSP](#)



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

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December 2016

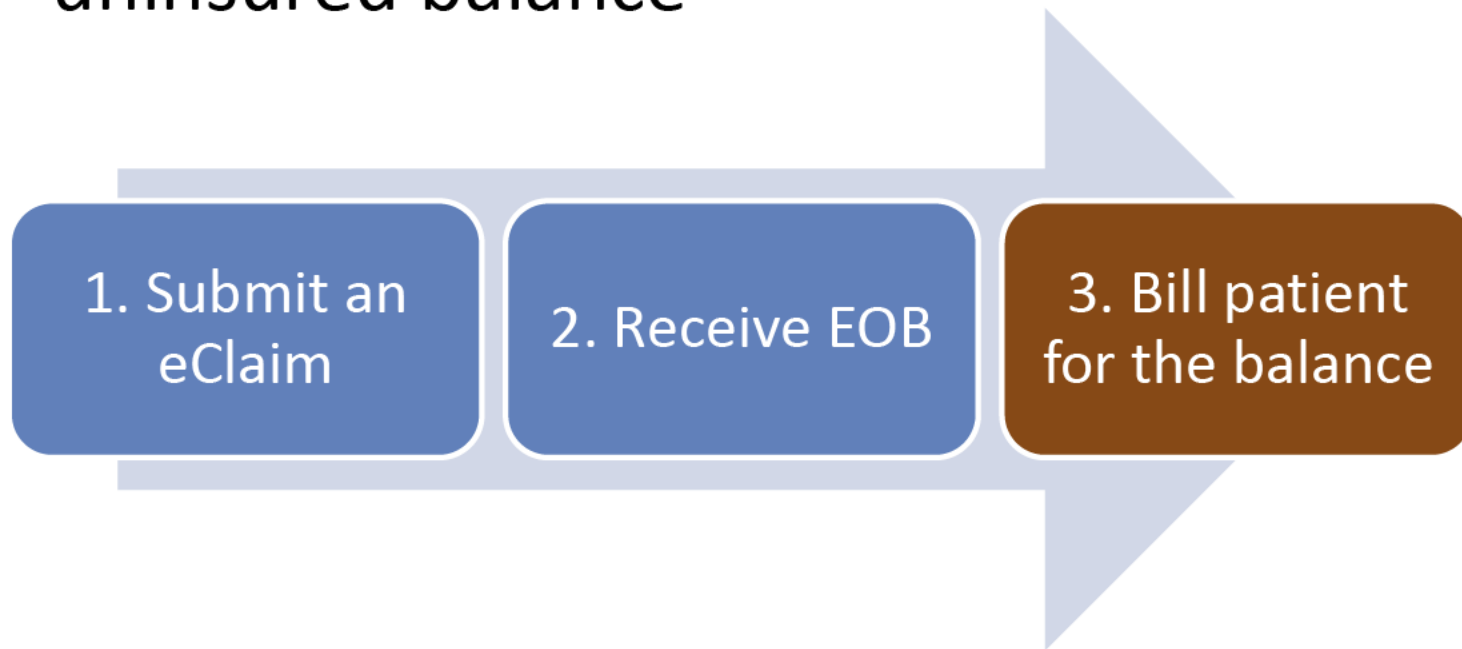
TD	Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3	4
5	6	7	8	9	10	11	12
13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28
29	30	31					

Invoice Counters

Total	158	
In Process	20	
Accepted	13	
Declined	0	
Private	99	
Drafts	0	
Outstanding	26	

You've learned

- The 3rd 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

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- 604-626-9903

