

STREAMLINE
your practice
ADMIN
with
CGM MEDEDI

Billing and Practice Management

Benefit Check & Quotations - User Manual

brought to you by



Introduction

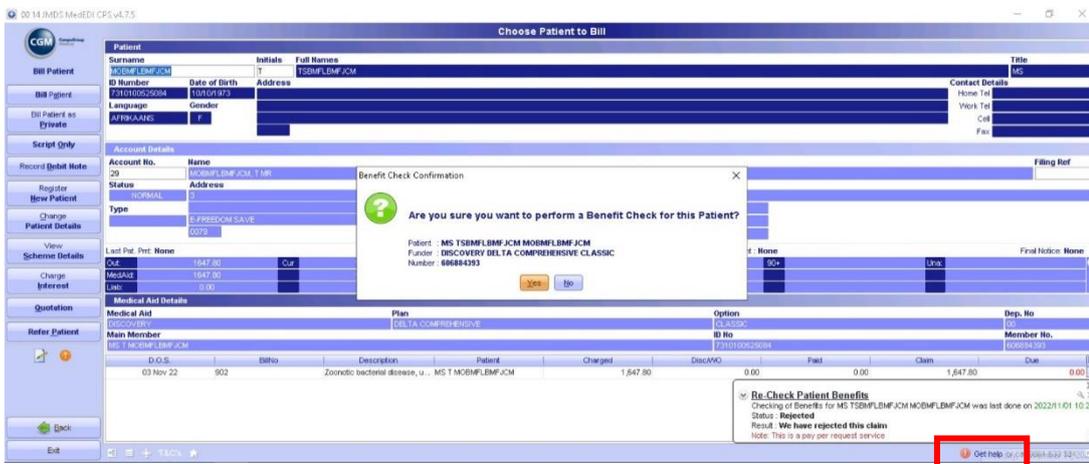
We have improved the CGM MEDEDI Benefit Check and Quotation capabilities to streamline your practice admin. You can now perform a benefit check and receive a real-time response from Discovery, Medscheme and MHG on whether your patient has the necessary funds available to cover their consultation costs.

In addition, you can also create a quotation for patients enabling you to share with your patients which costs their medical aid benefits will cost and whether co-payments will be needed for whatever procedure they may require.

Patient Benefit Check in CGM MEDEDI for Discovery, Medscheme and MHG

To start you will need to have a bill open in the patient's profile. Once you are ready to bill, click on the "get help" icon on the bottom right of your screen.

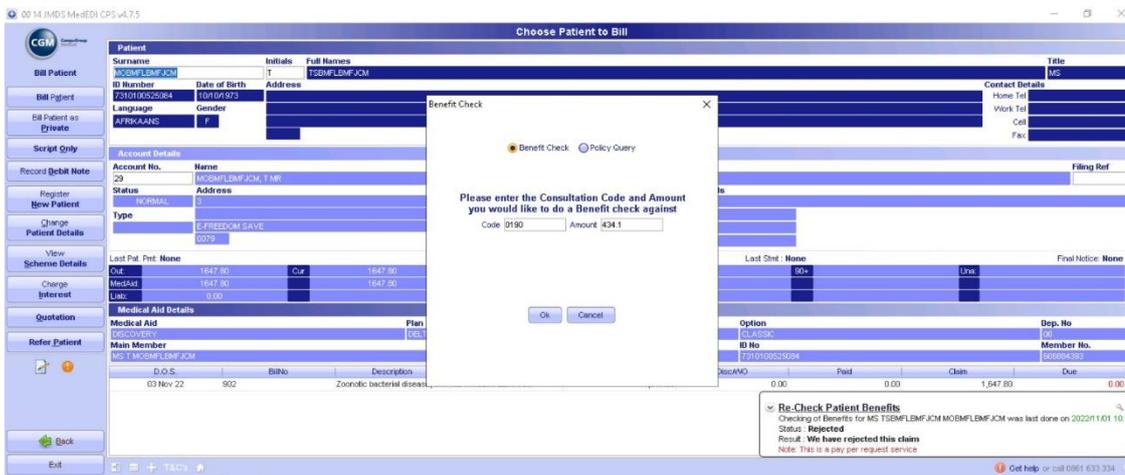
You will see a pop-up asking whether you are sure you would like to perform a benefit check, click "yes".



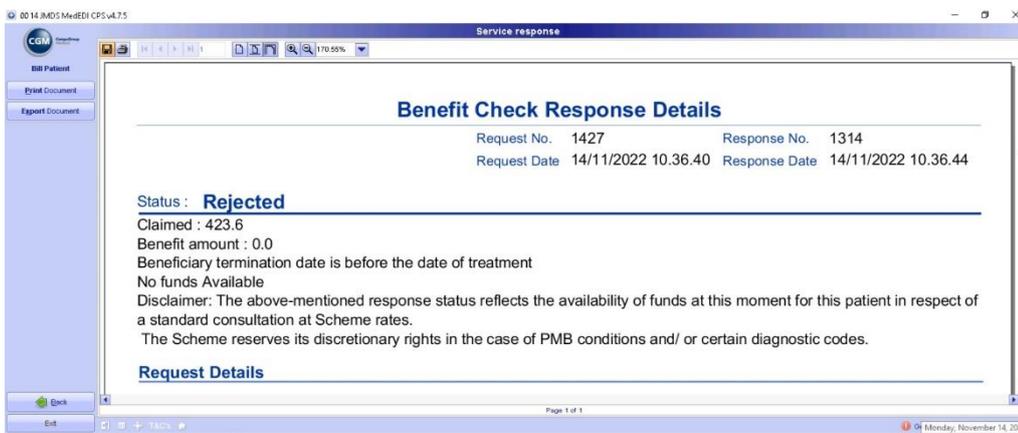
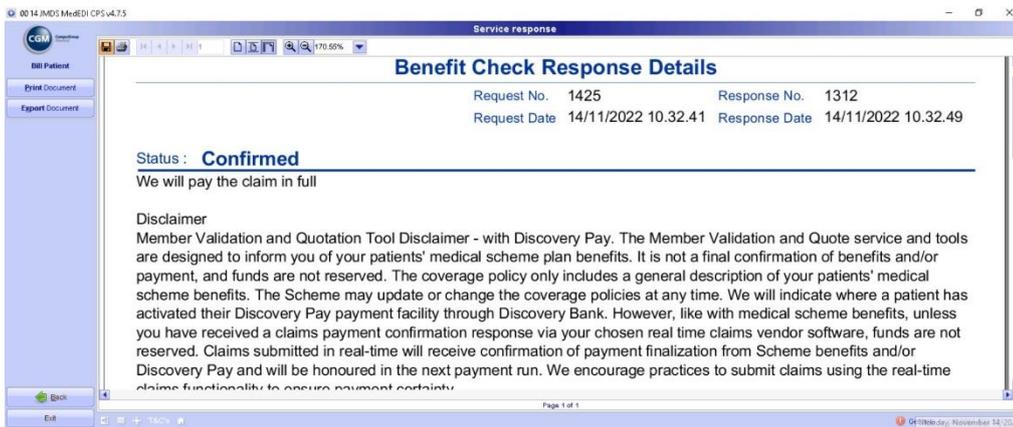
Performing a Benefit Check:

When you click yes, the Benefit Check pop-up will appear, click on Benefit Check.

Now you can enter the consultation code and/or the exact amount you are billing to ensure that the patient has the necessary medical aid cover to settle their account, and click "ok" to run the check.



The benefit check is real-time, you will receive a *Benefit Check Response* from Discovery, Medscheme or MHG in a few seconds. If the benefit check is **confirmed**, the medical aid will cover the claim, if it is **rejected** the medical aid will not cover the claim and you will need to bill the patient privately.



Performing a Policy query for Discovery members only:

When performing a Benefit Check, you have the option of performing a Policy query for your patients who are Discovery members.

When the Benefit Check pop-up window appears, select "Policy Query", enter the Rand value of what the consult will cost and click "ok". NOTE: unlike the benefit check, the policy query does not allow a consultation code.



You will receive a real-time response showing you all the patient's Medical Aid limit balances as well as other members/patients linked to this patient's medical aid.

0014 IMDS MedEDI CPS v4.7.5

Service response

Request Date 14/11/2022 10.30.24 Response Date 14/11/2022 10.30.28

Status : **Confirmed**

Limits Available

- GPNBN-NCO - Nurse Led DEB pharmacy clinic nurse consultations (6.0)
- GPNBN-GCO - Nurse Led DEB pharmacy clinic GP consultations (6.0)
- GPNBN-VCO - Nurse Led DEB pharmacy clinic consultations (6.0)

Members

- 7310100525084 - TSBMFLBMFJCM
The membership is valid and active - The member has enough day-to-day funds available
- 1105220277087 - MOBBCCFBJMLK
The membership is valid and active - The member has enough day-to-day funds available
- 0410261419080 - THBBKBLHKKD
The membership is valid and active - The member has enough day-to-day funds available

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Get help or call 0861 833 334

Quotations in CGM MEDEDI for Discovery, Medscheme and MHG

NOTE: before creating a quote you will require patient consent, it is always best to ensure the patient consents to the quote request before kicking off the process.

To create a quote, start in the billing screen in the patient profile, and click on the “Quotation” button on the left menu.

The screenshot shows the 'Choose Patient to Bill' window. The left-hand menu has a 'Quotation' button highlighted with a red box. The main area displays patient information, account details, and a list of charges. The charges table is as follows:

D.O.S.	BNNo	Description	Patient	Charged	Disc/AMO	Paid	Chm	Dus	HC
03 Nov 22	902	Zoonotic bacterial disease, u...	MS T MCOEPLMFJCM	1,847.80	0.00	0.00	1,847.80	0.00	

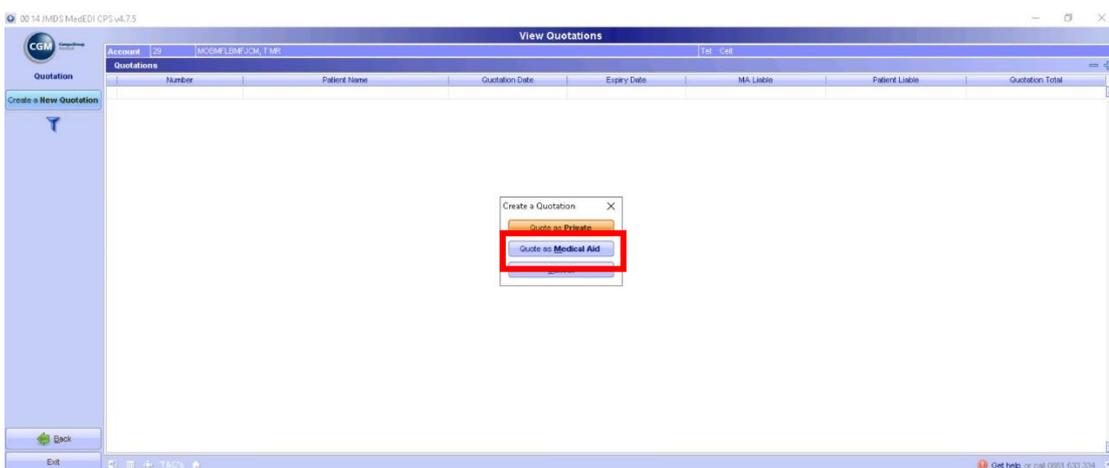
The View Quotations window will open, select, “Create a new quotation”

The screenshot shows the 'View Quotations' window. The left-hand menu has a 'Create a New Quotation' button highlighted with a red box. The main area displays a table with columns for Number, Patient Name, Quotation Date, Expiry Date, MA Liable, Patient Liable, and Quotation Total. The table is currently empty.

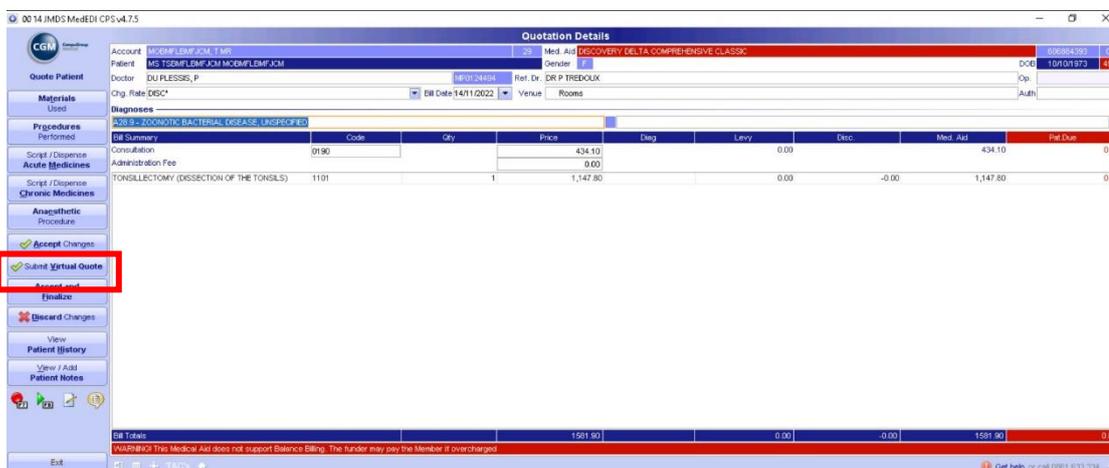
The View Quotations window will open, select, “Create a new quotation”



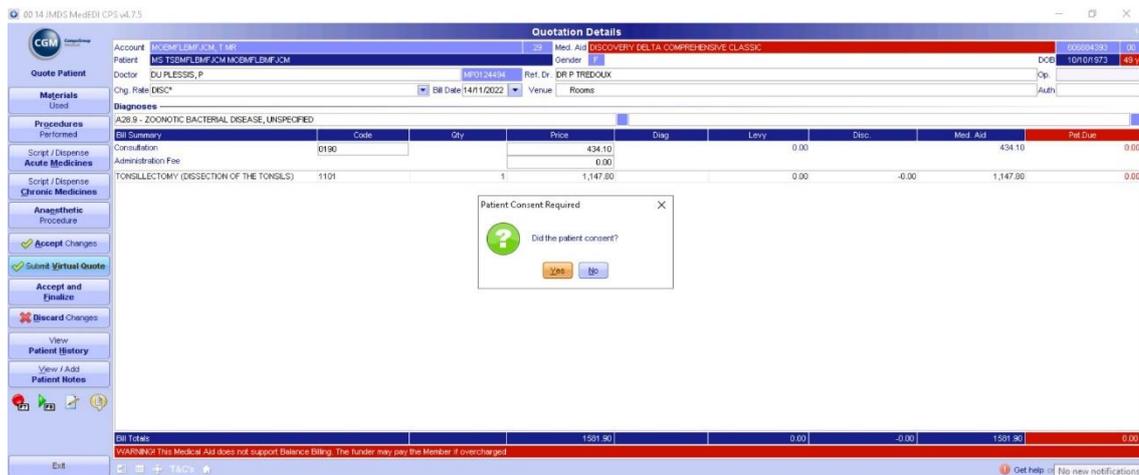
The Create a Quotation pop-up will open, select, “Quote as Medical Aid”



You can now go ahead and populate the quotation screen with the necessary details for the patient to create the quote e.g Medical Aid, Diagnosis, Consultation codes etc. Once you have completed all the details, click “Submit virtual quote” in the left menu.



A pop-up will appear to confirm whether the patient has given consent for the quote to be generated. If the patient has given consent click “yes”, if the patient hasn’t given consent click “no” and you will be redirected back to the quotation screen where you can either discard the quotation or continue and share the quote with the patient manually.



The quotation request is sent to the medical aid and you will receive a real-time response to confirm whether the quote has been approved.

