

On time, every time

MEDICAL AID PROCESSING

CGM MEDEDI

Billing and Practice Management

MEDICAL BILLING

TRAINING MANUAL

brought to you by



Table of Contents

Introduction to Medical Billing	3
Billing from the MEDEDI Task Organiser search functionality	3
Billing a patient from Medical Aid using the MEDEDI CPS Administrator	4
How to Bill a patient privately	8
Billing patient from the Calendar	11
Patient Benefit Check in CGM MEDEDI for Discovery, Medscheme and MHG	12
Performing a Benefit Check:	12
Performing a Policy query for Discovery members only:	13
Quotations in CGM MEDEDI for Discovery, Medscheme and MHG	15
Member Check	18
Patient Benefit Check in CGM MEDEDI for Discovery, Medscheme and MHG	19
Performing a Benefit Check:	19
Performing a Policy query for Discovery members only:	20
Quotations in CGM MEDEDI for Discovery, Medscheme and MHG	21
Member Check	23

Introduction to Medical Billing

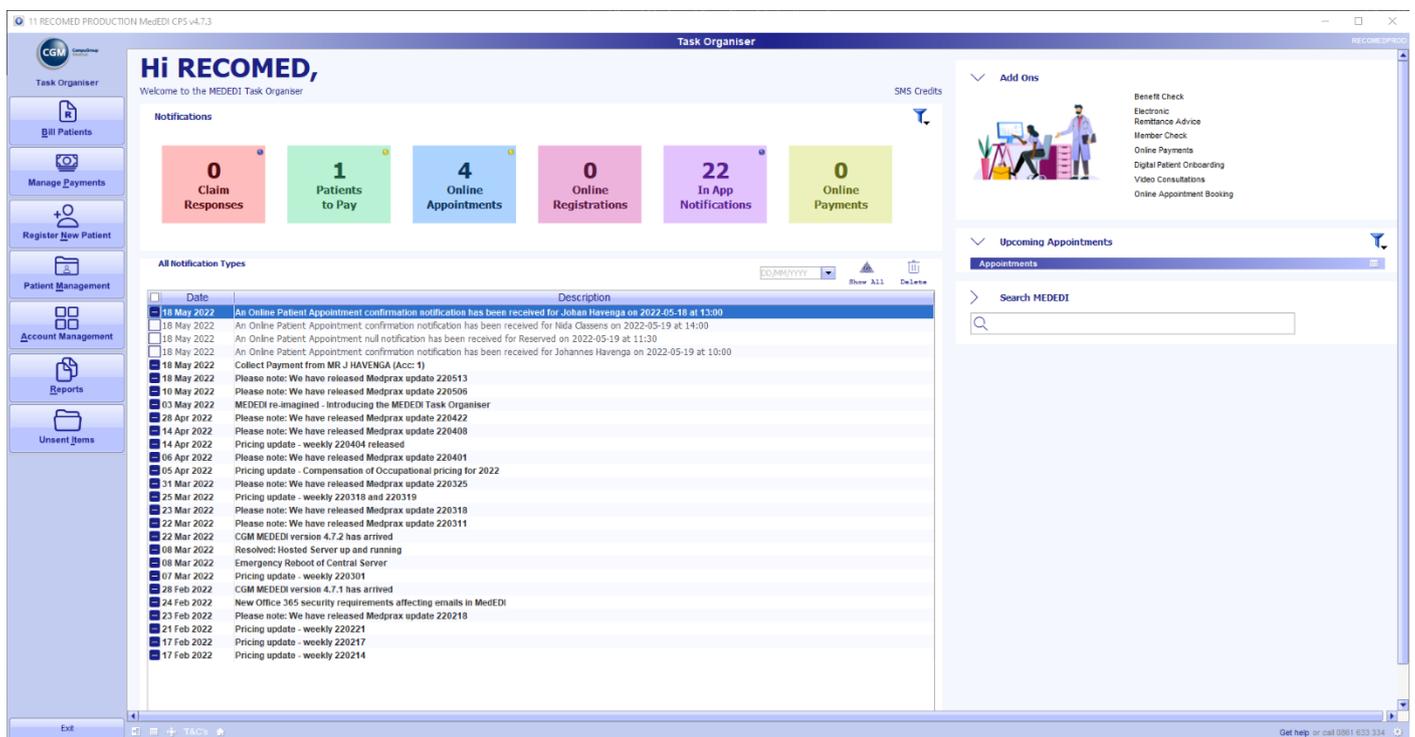
We know that medical billing and claims take up too much of your time! With fully integrated MEDEDI you can process ICD-10 codes and send medical aid claims in real-time knowing exactly what's covered, giving your patients transparency regarding their medical fees. Experience a fully automated ERA and receive scheme payment receipts in minutes. Monitor your practice health with financial dashboards and reports.

Let MEDEDI take the hassle out of medical aid claims, and free up your Practice Manager to focus on your patients and your business.

Billing from the MEDEDI Task Organiser search functionality

The new MEDEDI Search Function on the lower right-hand side of the Task Organiser has been included to allow a user to easily search for any patient with multiple criteria, search criteria can include, Name, Surname, DOB, ID Number, Membership Number, Account Name, Account number, File Reference number.

The following figure (figure 1) will be the new screen that will be displayed.



This will display below a search card with possible patients matching the criteria that was specified.

> Search MedEDI

Search: havenga

US, , E-FREEDOM SAVE, 0079	
HAVENGA, JJ MR	Account
Acc No. 12512	
CS, , SAAIPLAAS, 9430	
HAVENGA, JJ MR	Account
Acc No. 12513	
KOF, , D'ALMEIDA, 6506	
HAVENGA, J MR	Account
Acc No. 1750	
48 ST VES CRESSENT, , HIBBERDENE, 4220	

Billing from the Task Organiser Search function is available, once you have searched and selected the patient you will see the following options.

Patient	Private Bill 	New Bill 
HAVENGA, JOHAN MR		
		 notes

MOMENTUM LESOTHO		11111111
0621886834		johanneshavenga@gmail.com
Account		
Outstanding R 20919.80		Credits R -400.59
File ref:		Acc no. 1
Appointments		
22/11/2022 16:00		RECOMED, P

Private Bill will open the Private Billing screen where the patient will be billed as private.

New Bill will open the billing screen where you will be able to bill the patient and submit the bill to their Medical Aid.

Billing a patient from Medical Aid using the MEDEDI CPS Administrator

1. Bill patient (Medical Aid). From the main screen, click on the 'Bill / Debit Patient(s)' button.



2. Here you can search for a patient either by Surname or by Account number. Once correct Patient has been selected, click on the 'Bill Patient' button.

00 EMC DEMO MedEDI CPS v4.7.2

MEDEDI

Choose Patient to Bill

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Bill Patient

Bill Patient

Bill Patient as Private

Script Only

Record Debit Note

Register New Patient

Change Patient Details

View Scheme Details

Charge Interest

Quotation

Refer Patient

Practice Perfect Plus

Patient			
Surname	Initials	Full Names	Title
SMITH	J	JOHN	MR
ID Number	Date of Birth	Address	Contact Details
0001025094086	02/01/2000	1 STREET	Home Tel
Language	Gender		Work Tel
ENGLISH	M	PRETORIA	Cell 0831231234
		0001	Fax
Account Details			
Account No.	Name	Filing Ref	
4	SMITH, J MR	REF0001	
Status	Address	Contact Details	
NORMAL	1 STREET	email email@email.com	
Type		Tel	
PRETORIA		Cell 0831231234	
0001		Fax	
Last Pat. Pmt: None		Last Remit: None	
Out:	Cur	30	60
MedAid:			90+
Liab:			Una.
Medical Aid Details		Final Notice: None	
Medical Aid	Plan	Option	Dep. No
PRIVATE PATIENT	PRIVATE PATIENT	PRIVATE PATIENT	00
Main Member	ID No	Member No.	
MR J SMITH	0001025094086		

- The Bill Details screen will now show, and you can start building the bill. First complete the top portion of the screen and make sure the details are correct. These details include the Treating Doctor, The Charge rate (this information is automatically linked to the medical aid details entered on the Patient Profile), The Venue (Rooms / Hospital), referring Doctor (if applicable) and an Authorization number (if applicable).

Account	SMITH, J MR	4	Med. Aid	DISCOVERY CORE ESSENTIAL	123456789	00
Patient	MR JOHN SMITH		Gender	M	DOB	02/01/2000 22 y
Doctor	DEMO1, DR	MP4332211	Ref. Dr.		Op.	
Chg. Rate	DISC*	Bill Date	20/06/2022	Venue	Rooms	Auth
Diagnoses						

- Now add in the diagnoses codes. MEDEDI allows for up to 8 codes to be added. The diagnoses can either be typed in by code (recommended) or by typing word.

Diagnoses

Z0

Z00 - General examination and investigation of persons without complaint and reported diagnosis

- Z00.0 - General medical examination
- Z00.1 - Routine child health examination
- Z00.2 - Examination for period of rapid growth in childhood
- Z00.3 - Examination for adolescent development state
- Z00.4 - General psychiatric examination, not elsewhere classified

- Next option is to add in Materials used (if applicable). Click on the 'Materials Used' button.

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Bill Patient

Materials Used

Procedures Performed

- Here you can type in the NAPPI Code (recommended) or type in the description of the materials used.

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Materials

Account: SMITH, J MR 4 Med. Aid: DISCOVERY CORE ESSENTIAL
 Patient: MR JOHN SMITH Gender: M
 Doctor: DEMO1, DR MP4332211 Ref. Dr.:
 Chg. Rate: DISC* Bill Date: 21/06/2022 Venue: Rooms

Diagnoses: Z00.0 - GENERAL MEDICAL EXAMINATION

Materials	Code	Qty	Price	Diag	Levy
Q8S2	0201	1	0.16		

Code | Name | Pack | Unit Price | On Hand | Ex

Q8S2 | NEEDLE HYPODERMIC 40MM 21GB01 NDL | 1.0 | 0.16 | |

- Adjust the quantity of materials used and then add additional lines

Materials	Code	Qty	Price	Diag	Levy
NEEDLE HYPODERMIC 40MM 21GB01 NDL	0201	5	0.78		

B44

Code	Name	Pack	Unit Price	On Hand	Ex
B449	BERBERIS-HOM 30ML DRP	1.0	189.89		
B440	BETAPAM 5MG TAB	1000.0	156.55		
B447	DISC BELLADONNA-HOM 30ML DRP	1.0	155.87		
B44P	DISC CATH TROCAR ALL SIZES TROCA0010 CSM	1.0	166.82		
B44D	DISC SYRINGE 2ML 2 PART PRO SNG	1.0	4.92		
B44E	DISC SYRINGE 5ML 2 PART PROMEX SNG	1.0	1.13		
B44B	SYRINGE WITHOUT NEEDLE 3 PART PRX 10ML SNG	100.0	9.58		
B44C	SYRINGE WITHOUT NEEDLE 3 PART PRX 20ML SNG	100.0	14.14		
B44A	SYRINGE WITHOUT NEEDLE 3 PART PRX 5ML SNG	100.0	6.19		

- Click on 'Accept Changes' to add all materials used and return to main billing screen. The materials will now reflect on the billing screen.

00 EMC DEMO MedEDI CPS v4.7.2

Bill Details

Account: SMITH, J MR 4 Med. Aid: DISCOVERY CORE ESSENTIAL 123456789 00
 Patient: MR JOHN SMITH Gender: M DOB: 02/01/2000 22 y
 Doctor: DEMO1, DR MP4332211 Ref. Dr.: Op.
 Chg. Rate: DISC* Bill Date: 21/06/2022 Venue: Rooms Auth.

Diagnoses: Z00.0 - GENERAL MEDICAL EXAMINATION

Bill Summary	Code	Qty	Price	Diag	Levy	Disc.	Med. Aid	Pat. Due
Consultation	0190		416.60		416.60		0.00	416.60
Administration Fee			0.00					
NEEDLE HYPODERMIC 40MM 21GB01 NDL	0201	5	0.78		0.78	-0.00	0.00	0.78
SYRINGE WITHOUT NEEDLE 3 PART PRX ...	0201	5	70.71		70.71	-0.00	0.00	70.71

- Next option is to add in procedure performed (if applicable). Click on the 'Procedures Performed' button.

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Bill Patient

Materials Used

Procedures Performed

- Add in the Procedure code for each procedure performed. Multiple codes can be entered on this screen.

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Procedures

Account: SMITH, J MR 4 Med. Aid: DISCOVERY CORE ESSENTIAL 123456789 00
 Patient: MR JOHN SMITH Gender: M DOB: 02/01/2000 22 y
 Doctor: DEMO1, DR MP4332211 Ref. Dr.: Op.:
 Chg. Rate: DISC* Bill Date: 21/06/2022 Venue: Rooms Auth:

Diagnoses: Z00.0 - GENERAL MEDICAL EXAMINATION

Procedures	Qty	Price	Diag	Levy	Med. Aid	Pat. Due
1110 LUDWIG'S ANGINA: DRAINAGE	1	616.90		616.90	0.00	616.90
1111 POST TONSILLECTOMY OR ADENOIDECTOMY HA...	1	675.60		675.60	0.00	675.60

Buttons: Accept Changes, Discard Changes, View Patient History

11. Click on 'Accept Changes' to add all Procedures conducted and return to main billing screen. The Bill is now ready to be checked to see if all information has been added before submission of the bill.

00 EMC DEMO MedEDI CPS v4.7.2

Bill Details

Account: SMITH, J MR 4 Med. Aid: DISCOVERY CORE ESSENTIAL 123456789 00
 Patient: MR JOHN SMITH Gender: M DOB: 02/01/2000 22 y
 Doctor: DEMO1, DR MP4332211 Ref. Dr.: Op.:
 Chg. Rate: DISC* Bill Date: 21/06/2022 Venue: Rooms Auth:

Diagnoses: Z00.0 - GENERAL MEDICAL EXAMINATION

Code	Qty	Price	Diag	Levy	Disc.	Med. Aid	Pat. Due
1 0190 Consultation		416.60		416.60		0.00	416.60
Administration Fee		0.00					
1110 LUDWIG'S ANGINA: DRAINAGE	1	616.90		616.90	-0.00	0.00	616.90
1111 POST TONSILLECTOMY OR ADENOIDECT...	1	675.60		675.60	-0.00	0.00	675.60
0201 NEEDLE HYPODERMIC 40MM 21GB01 NDL	5	0.78		0.78	-0.00	0.00	0.78
0201 SYRINGE WITHOUT NEEDLE 3 PART PRX...	5	70.71		70.71	-0.00	0.00	70.71
Bill Totals		1780.59		1780.59	-0.00	0.00	1780.59

Buttons: Submit Bill, Discard Changes, View Patient History, View / Add Patient Notes

WARNING: This Medical Aid does not support Balance Billing. The funder may pay the Member if overcharged

- 1 Consultation code (will appear by default)
- 2 Procedure(s) performed
- 3 Materials used
- 4 Bill total

12. Once the bill has been checked and is ready to finalize, click on the 'Submit Bill' button to send through to the relevant Medical Aid. The bill will be submitted, and a response will be generated.

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Bill Patient

Materials Used

Procedures Performed

Script / Dispense Acute Medicines

Script / Dispense Chronic Medicines

Anaesthetic Procedure

Submit Bill

Discard Changes

View Patient History

View / Add Patient Notes

How to Bill a patient privately

1. From the main screen, click on the 'Bill / Debit Patient(s)' button.



2. Here you can search for a patient either by Surname or by Account number. Once the correct Patient has been selected, click on the 'Bill Patient as Private' button.

The screenshot displays the 'Choose Patient to Bill' window. On the left is a vertical menu with options like 'Bill Patient', 'Bill Patient as Private', 'Script Only', etc. The main area is divided into sections: 'Patient' (Surname: SMITH, Initials: J, Full Name: JANE, Title: MS, ID Number: 0001011234123, Date of Birth: 01/01/2000, Address: 2 STREET, Language: ENGLISH, Gender: F, Location: PRETORIA, 0002), 'Account Details' (Account No.: 6, Name: SMITH, J MS, Status: NORMAL, Address: 2 STREET, Type: PRETORIA, 0002), and 'Medical Aid Details' (Medical Aid: PRIVATE PATIENT, Plan: PRIVATE PATIENT, Option: PRIVATE PATIENT, Dep. No.: 00, Main Member: MS J SMITH, ID No.: 0001011234123, Member No.:). At the bottom, there is a table with columns: D.O.S., BillNo, Description, Patient, Charged, Disc/WO, Paid, Claim, Due.

3. The Bill Details screen will now show, and you can start building the bill. First complete the top portion of the screen and make sure the details are correct. These details include the Treating Doctor, The Charge rate (this information is automatically linked to the medical aid details entered on the Patient Profile), The Venue (Rooms / Hospital), referring Doctor (if applicable) and an Authorization number (if applicable).

The screenshot shows the 'Bill Details' form. Fields include: Account (SMITH, J MS), Patient (MS JANE SMITH), Doctor (DEMO1, DR), Chg. Rate (STANDARD*), Bill Date (21/06/2022), Venue (Rooms), Med. Aid (PRIVATE PATIENT SEP), Gender (F), Ref. Dr. (), Op. (), Auth (), and DOB (01/01/2000, 22 y). Below the form is a 'Diagnoses' section with a search bar and a list of codes.

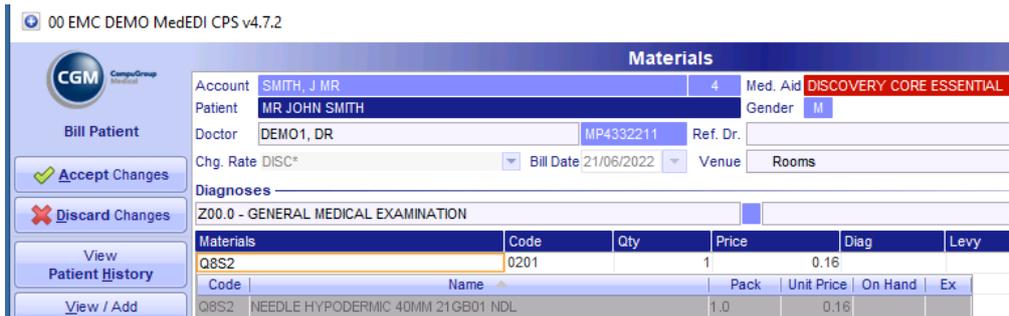
4. Now add in the diagnoses codes. MEDEDI allows for up to 8 codes to be added. The diagnoses can either be typed in by code (recommended) or by typing word.

The screenshot shows the 'Diagnoses' list. A search bar contains 'Z0'. Below it, a list of diagnosis codes is displayed, with 'Z00 - General examination and investigation of persons without complaint and reported diagnosis' selected. Other visible codes include Z00.0 - General medical examination, Z00.1 - Routine child health examination, Z00.2 - Examination for period of rapid growth in childhood, Z00.3 - Examination for adolescent development state, and Z00.4 - General psychiatric examination, not elsewhere classified.

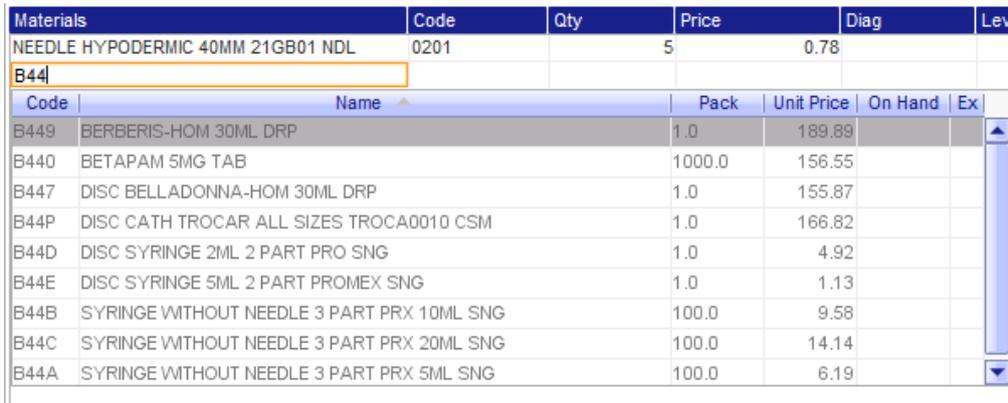
- Next option is to add in Materials used (if applicable). Click on the 'Materials Used' button.



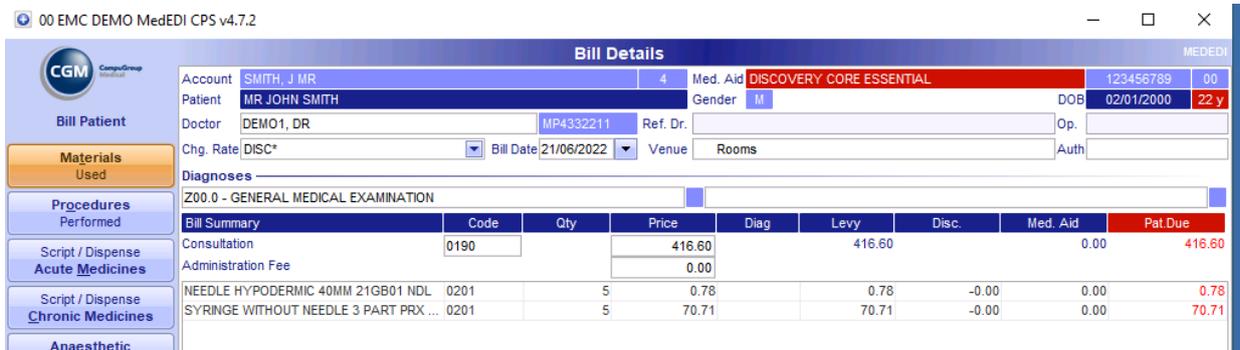
- Here you can type in the NAPPI Code (recommended), or type in the description of the materials used.



- Adjust the number of materials used and then add additional lines.



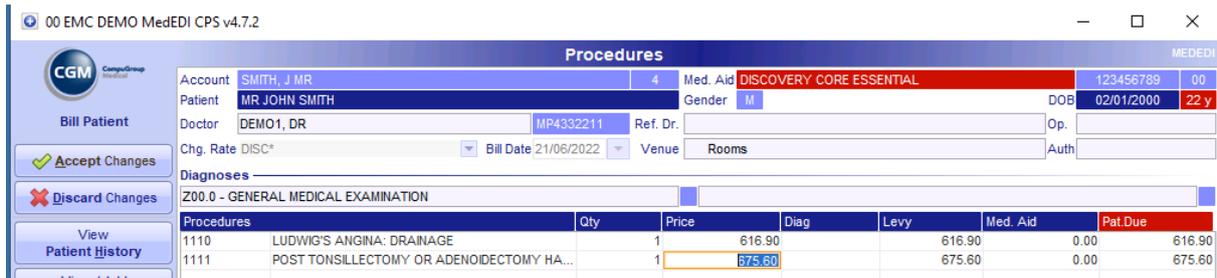
- Click on 'Accept Changes' to add all materials used and return to main billing screen. The materials will now reflect on the billing screen.



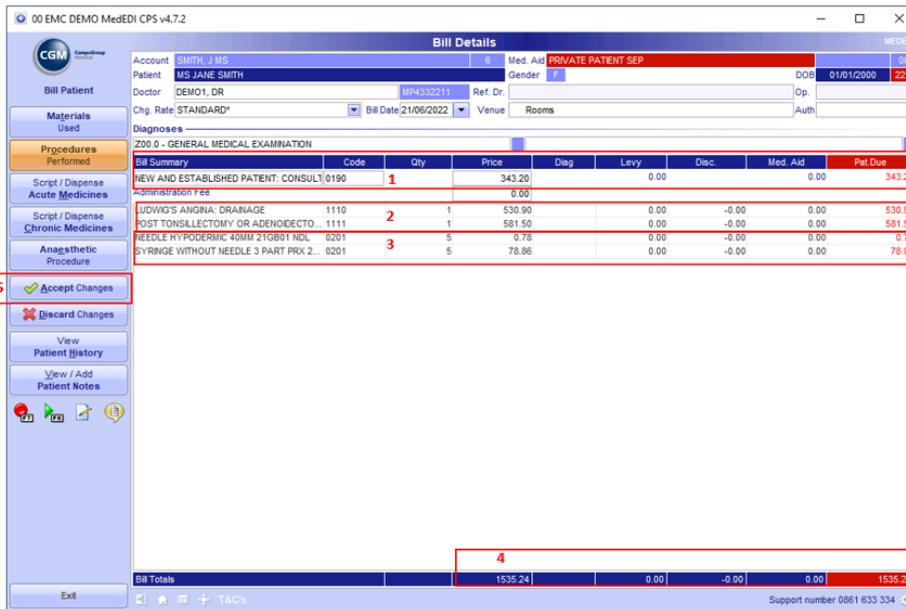
9. Next option is to add in procedure performed (if applicable). Click on the 'Procedures Performed' button.



10. Add in the Procedure code for each procedure performed. Multiple codes can be entered on this screen.



11. Click on 'Accept Changes' to add all Procedures conducted and return to main billing screen. The Bill is now ready to be checked to see if all information has been added before submission of the bill.



- 1 Consultation code (will appear by default)
- 2 Procedure(s) performed
- 3 Materials used
- 4 Bill total
- 5 Accept and Finalize Bill

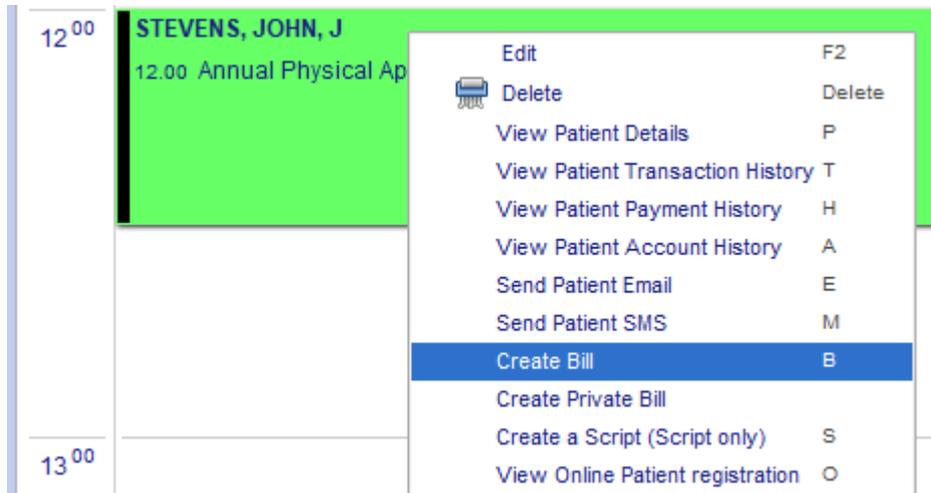
12. Once the bill has been checked and is ready to finalize, click on the 'Accept Changes' button to finalize and create the bill. The bill will be created, and a notification will be created on the main menu to collect payment.



Billing patient from the Calendar

Once a patient has arrived and been seen by doctor, you can select to Bill the patient directly from the Calendar, this allows you to save time and be sure you have selected the correct Patient to Bill.

1. Right Click on the Appointment that has now been completed and selects the option either to Bill Patient or Bill Patient Private.



2. This will bring up the Bill Details Screen with the Patient already selected and allow you to bill the patient by adding Diagnosis, procedures, consultation etc.

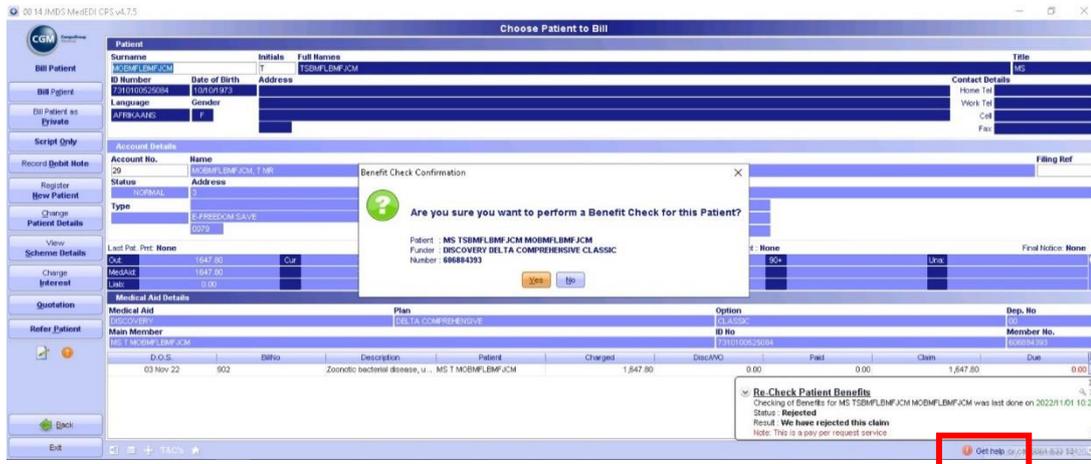


3. Depending on whether you have selected to Bill the Patient or Bill the Patient Privately you can either Submit the Bill to the Medical Aid or select to Accept the Bill that will make the Patient Liable for the Payment.
4. Bill Patient, submitting to the Medical Aid Scheme will allow you to receive a Claim response from them advising the outcome of the claim, you will be able to also receive this Response on your Main Menu in CGM MEDEDI CPS Notification area
5. Billing the Patient as Private will allow you to complete the bill and make the Patient liable for the Outstanding amount, this will again provide you with a notification on you Main Menu in CGM MEDEDI CPS Notification area with an entry "Collect Payment from Mr J STEVENS (Acc: 4)".

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.

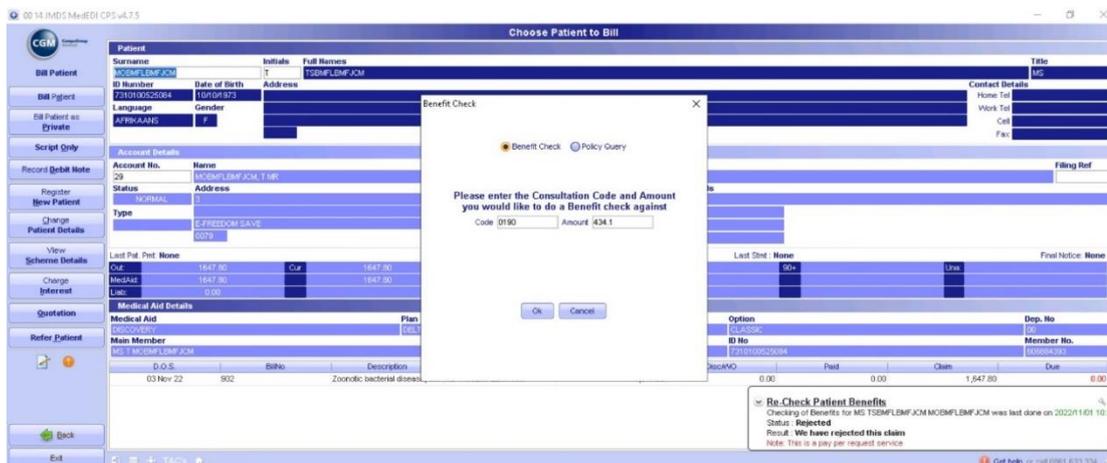
You will see a pop-up asking whether you are sure you would like to perform a benefit check, click "yes".



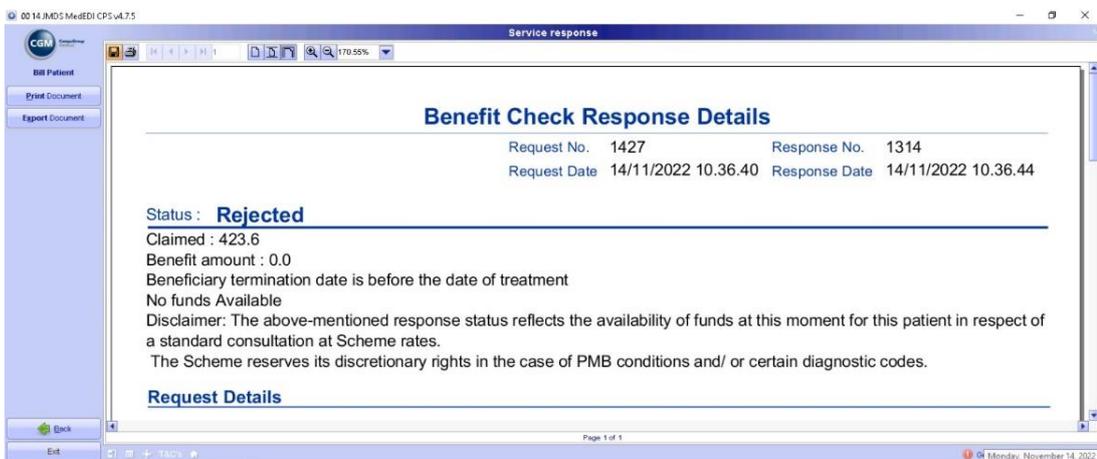
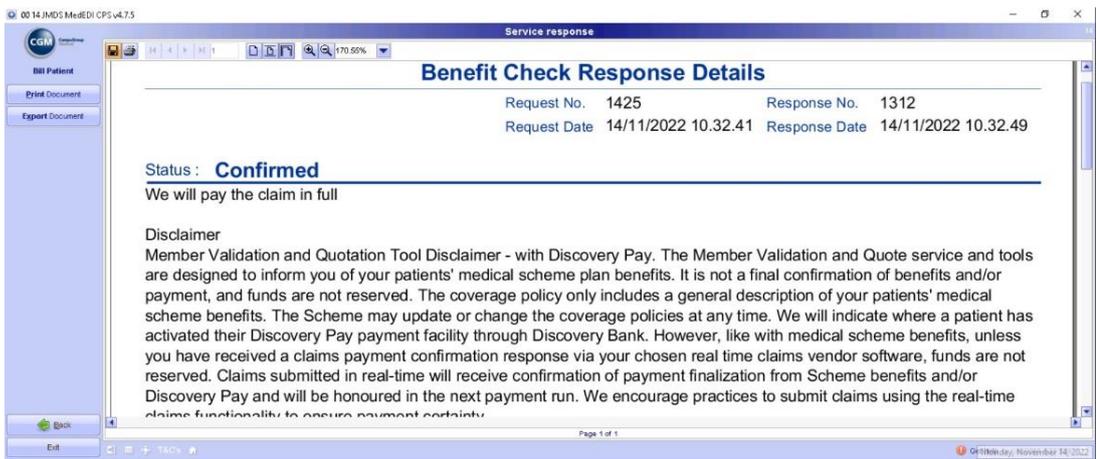
Performing a Benefit Check:

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

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

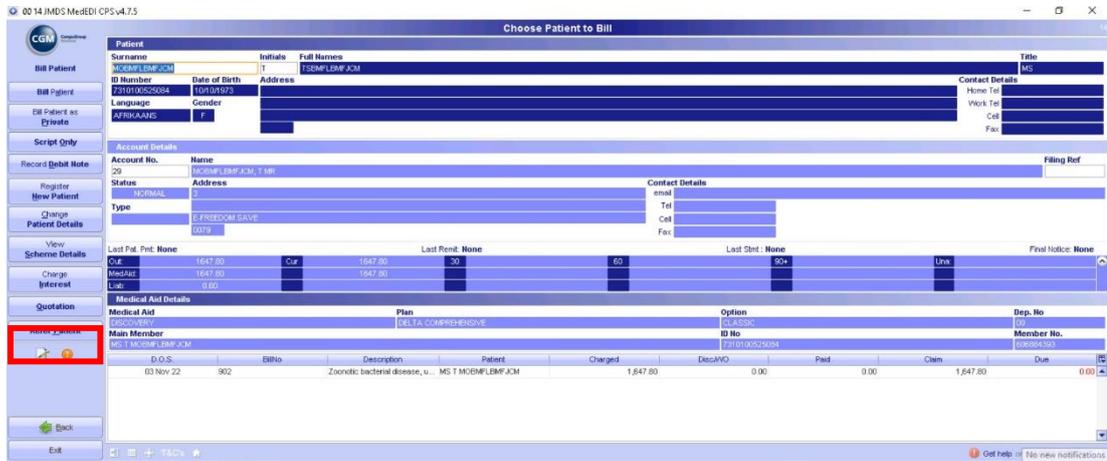
Page 1 of 1

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



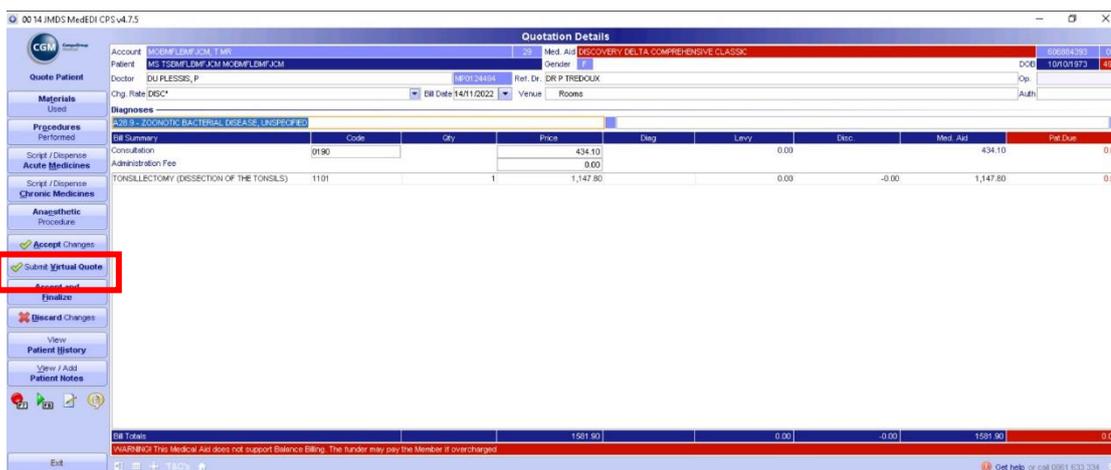
The View Quotations window will open, select, “Create a new quotation”



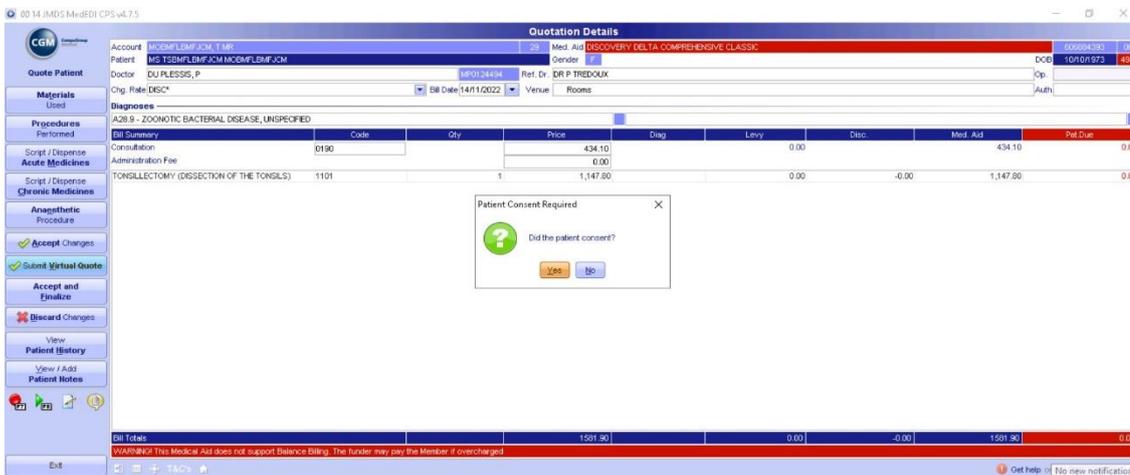
The Create a Quotation pop-up will open, select, "Quote as Medical Aid"



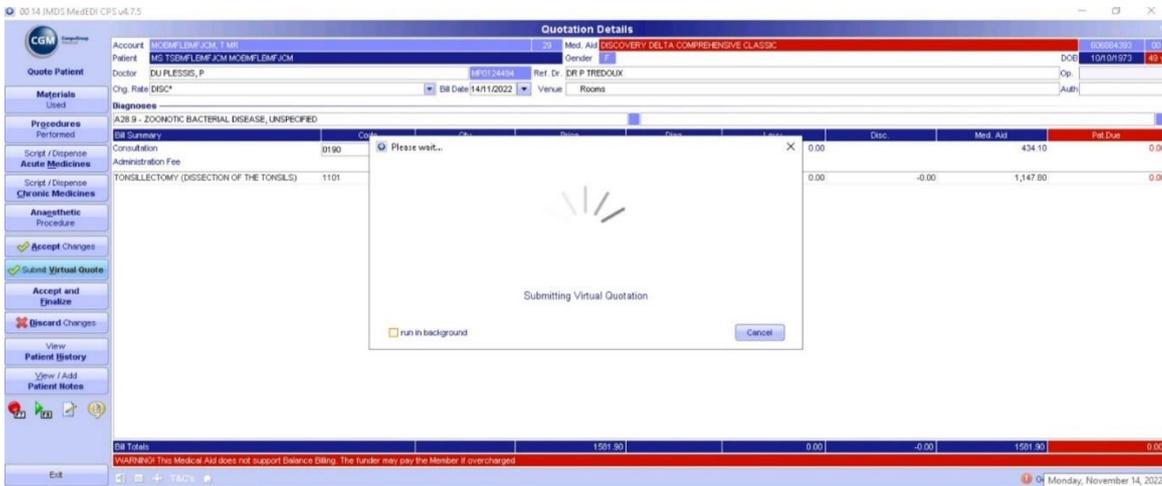
You can now go ahead and populate the quotation screen with the necessary details for the patient to create the quote e.g Medical Aid, Diagnosis, Consultation codes etc. Once you have completed all the details, click "Submit virtual quote" in the left menu.



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"

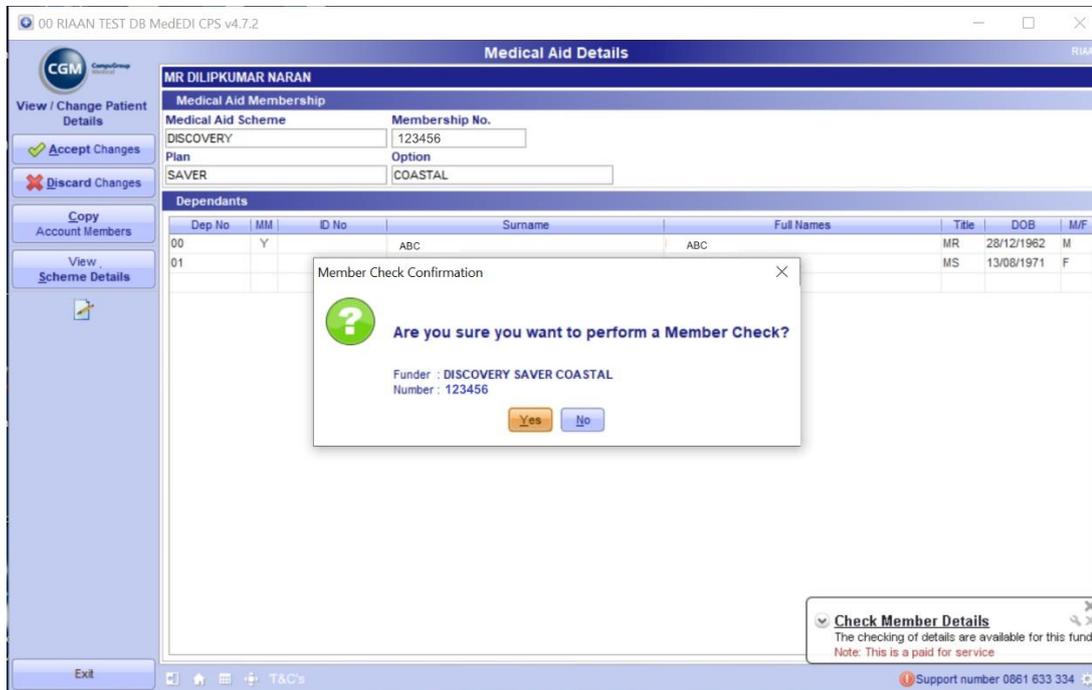


The quotation request is sent to the medical aid and you will receive a real-time response to confirm whether the quote has been approved.



Member Check

When registering a new Patient and amending current patients' Medical aid details the Member check pop-up will appear if the scheme is enabled for member check.



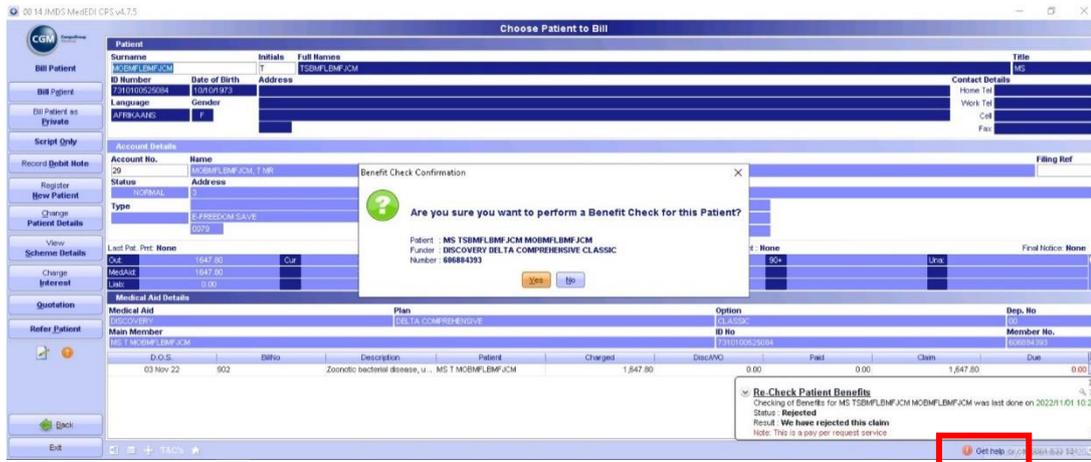
Once you have the Member Check Details, another screen will pop up which will display the member details. You can then select to import the member and their dependants from the scheme.



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.

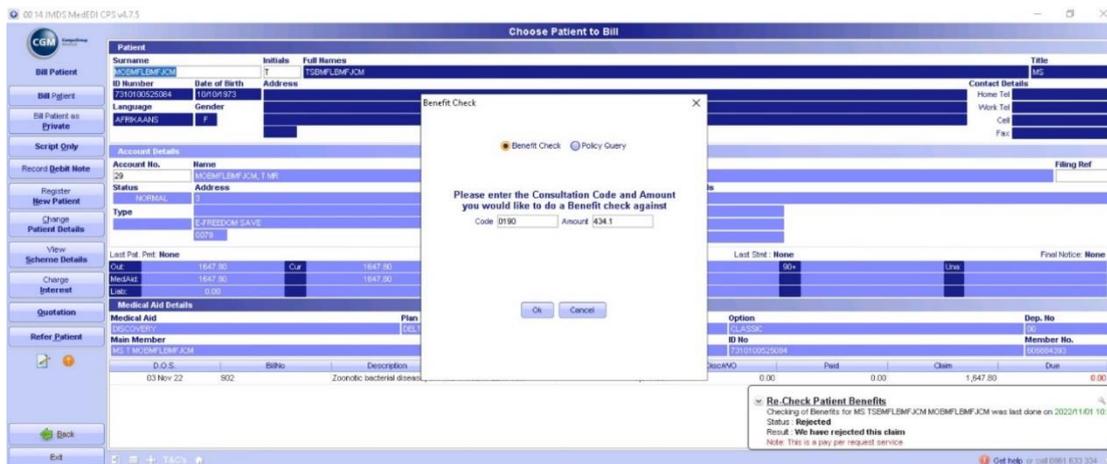
You will see a pop-up asking whether you are sure you would like to perform a benefit check, click "yes".



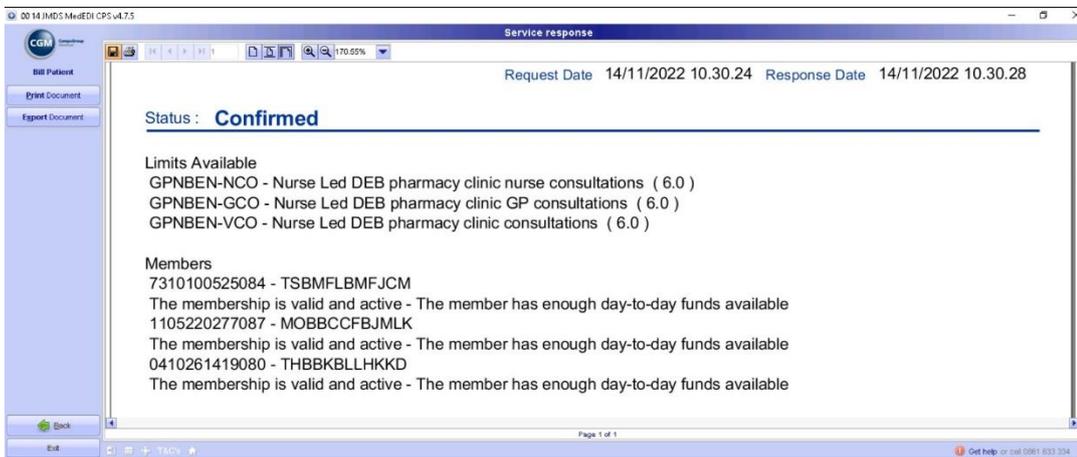
Performing a Benefit Check:

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.



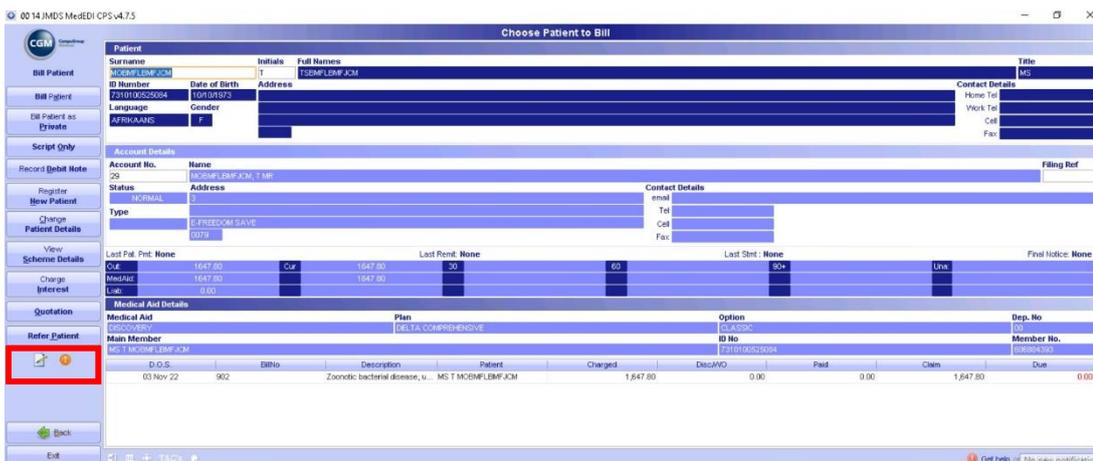
The benefit check is real-time, you will receive a *Benefit Check Response* from Discovery, Medscheme or MHG in a few seconds. If the benefit check is **confirmed**, the medical aid will cover the claim, if it is **rejected** the medical aid will not cover the claim and you will need to bill the patient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



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.



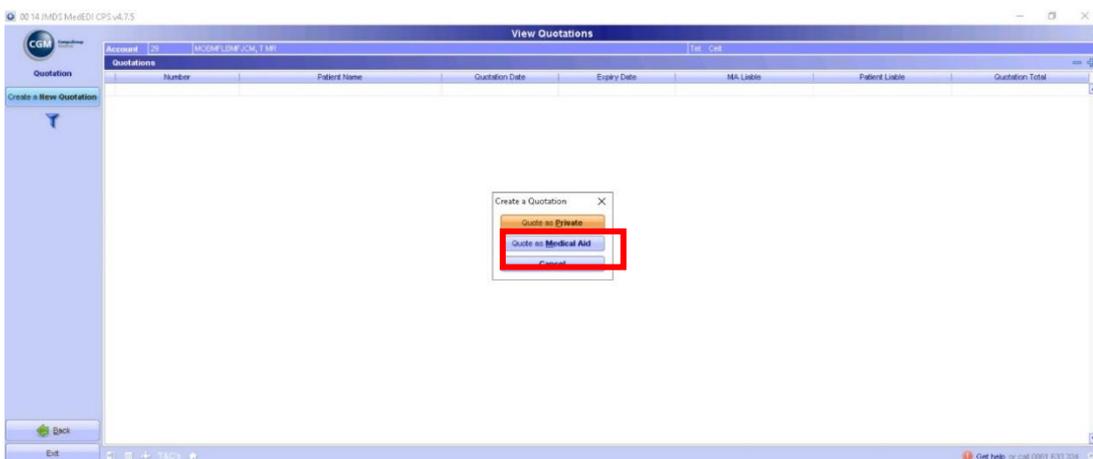
The View Quotations window will open, select, “Create a new quotation”



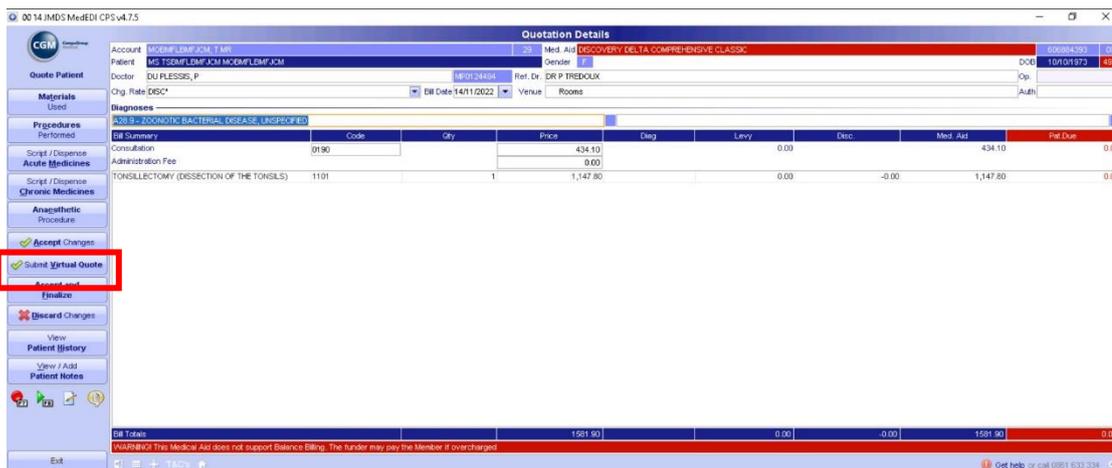
The View Quotation window will open. Select “Create a new quotation”



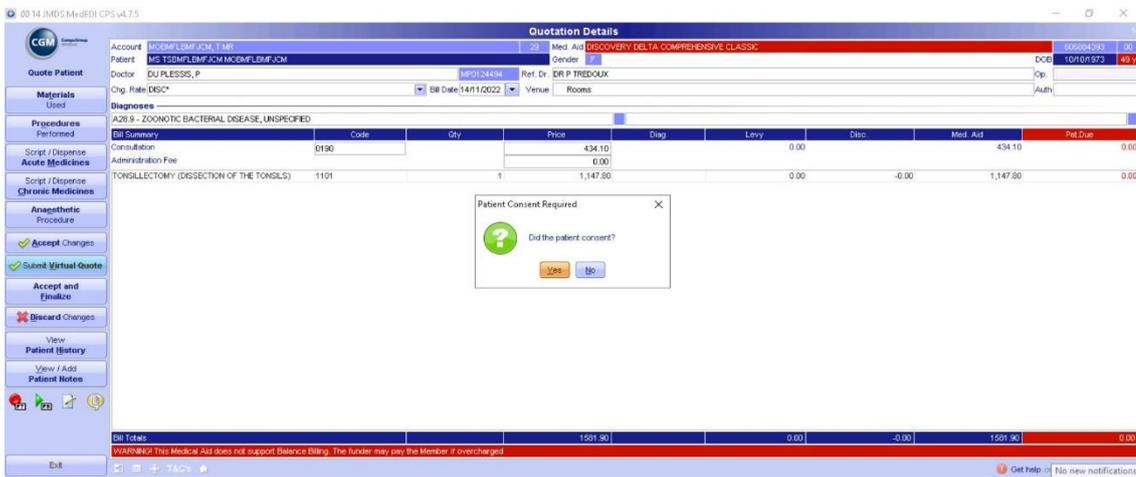
The Create a Quotation pop-up will open, select, “Quote as Medical Aid”



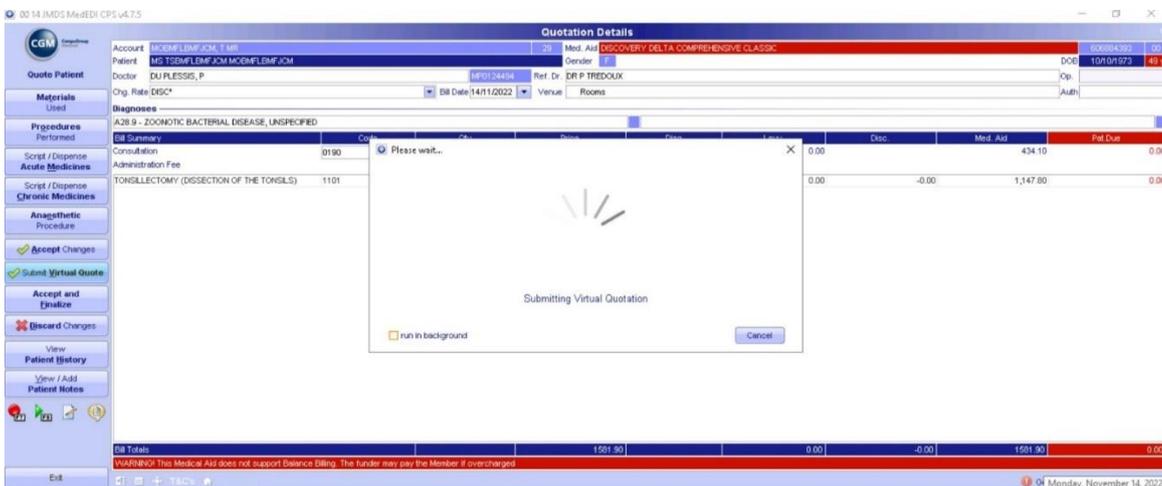
You can now go ahead and populate the quotation screen with the necessary details for the patient to create the quote e.g Medical Aid, Diagnosis, Consultation codes etc. Once you have completed all the details, click “Submit virtual quote” in the left menu.



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”

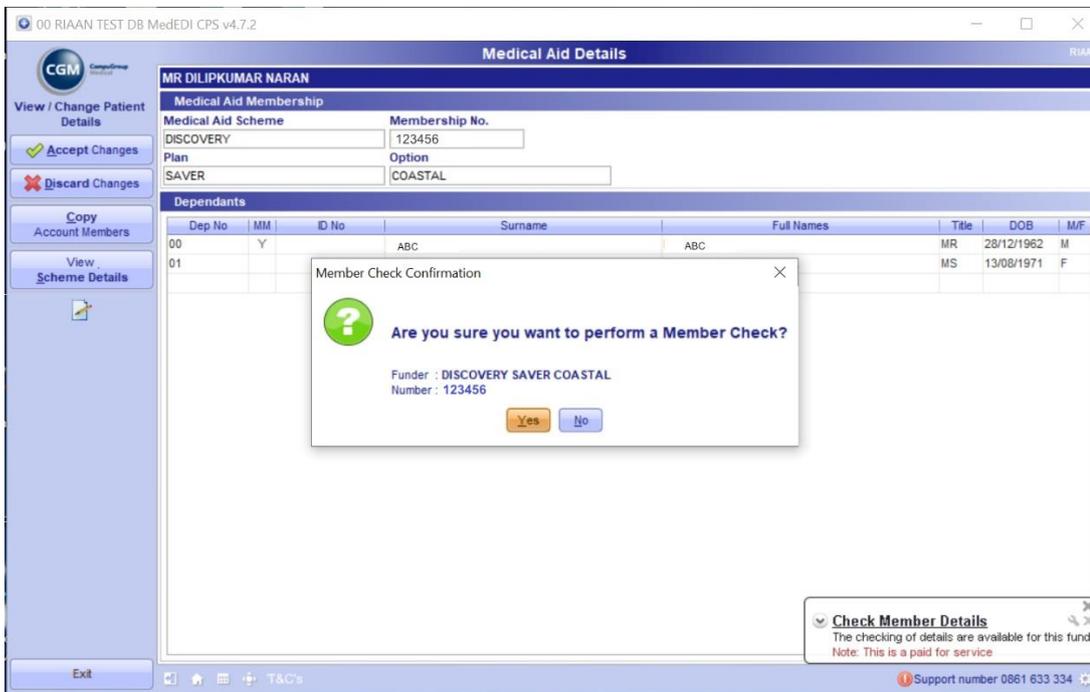


The quotation request is sent to the medical aid and you will receive a real-time response to confirm whether the quote has been approved.

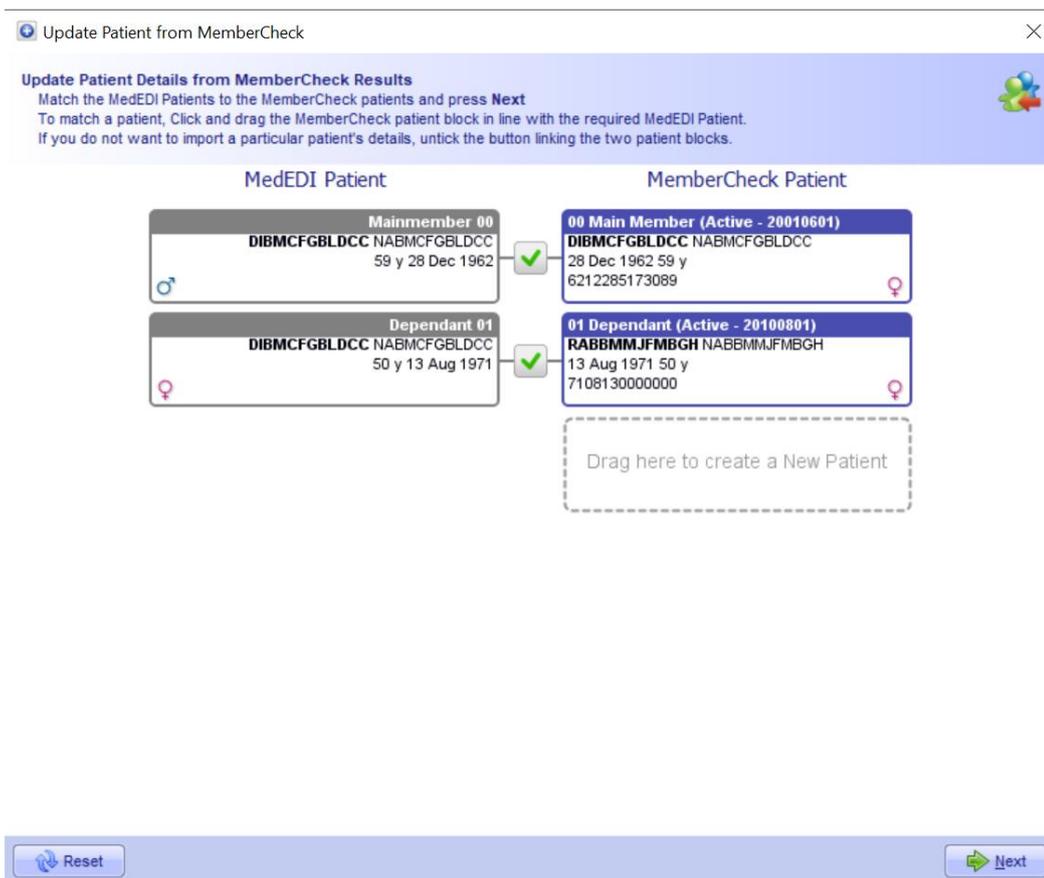


Member Check

When registering a new Patient and amending current patients' Medical aid details the Member check pop-up will appear if the scheme is enabled for member check.



Once you have the Member Check Details, another screen will pop up which will display the member details. You can then select to import the member and their dependants from the scheme.



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Have questions or need a hand? Click on the Help link on the bottom right of your screen and one of our friendly agents will be in touch. Alternatively, call 0861 633 334 or email us on help.za@cgm.com to chat to one of our friendly Customer Support agents.