

# CGM Xdent Claim Submissions

The following guide will take you through the required steps on doing a Live Real-Time claim submission through to your Medical Aids.

**NB - Please take note!**

This guide follows up on the prior knowledge of a completed treatment plan that has all the required Treatments already captured. If assistance on Creating a Treatment plan is needed, please consider making use of our Xdent training resources.

- Once the treatments on the Treatment Plan have been marked as *Performed* and the treatment plan *Completed*, please make your way to the *Accounting record* option of the patient's file.

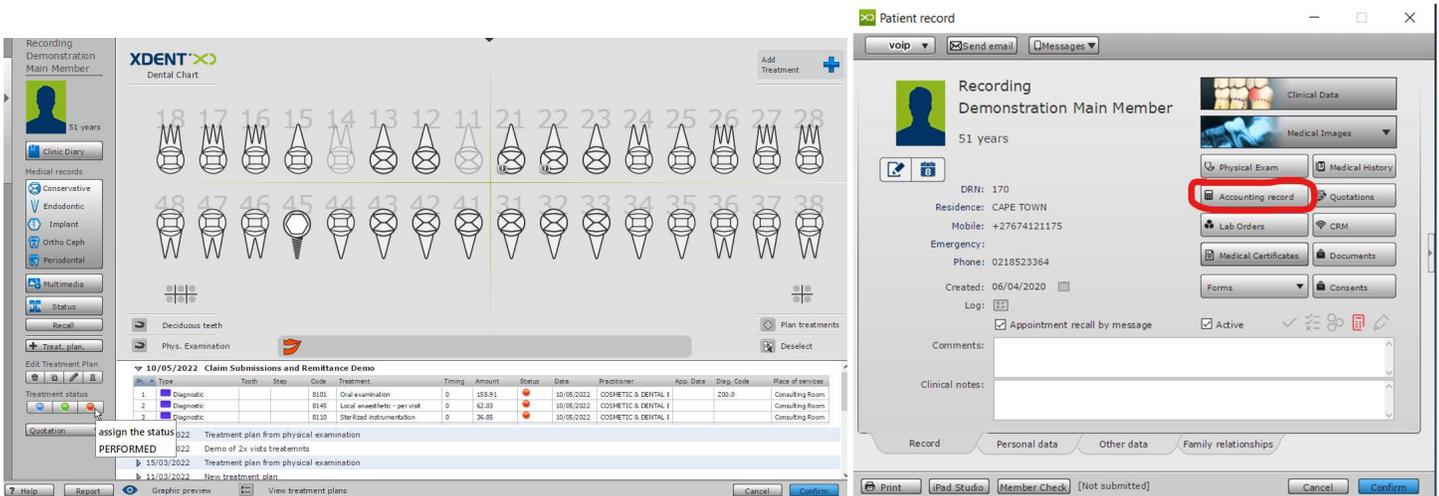
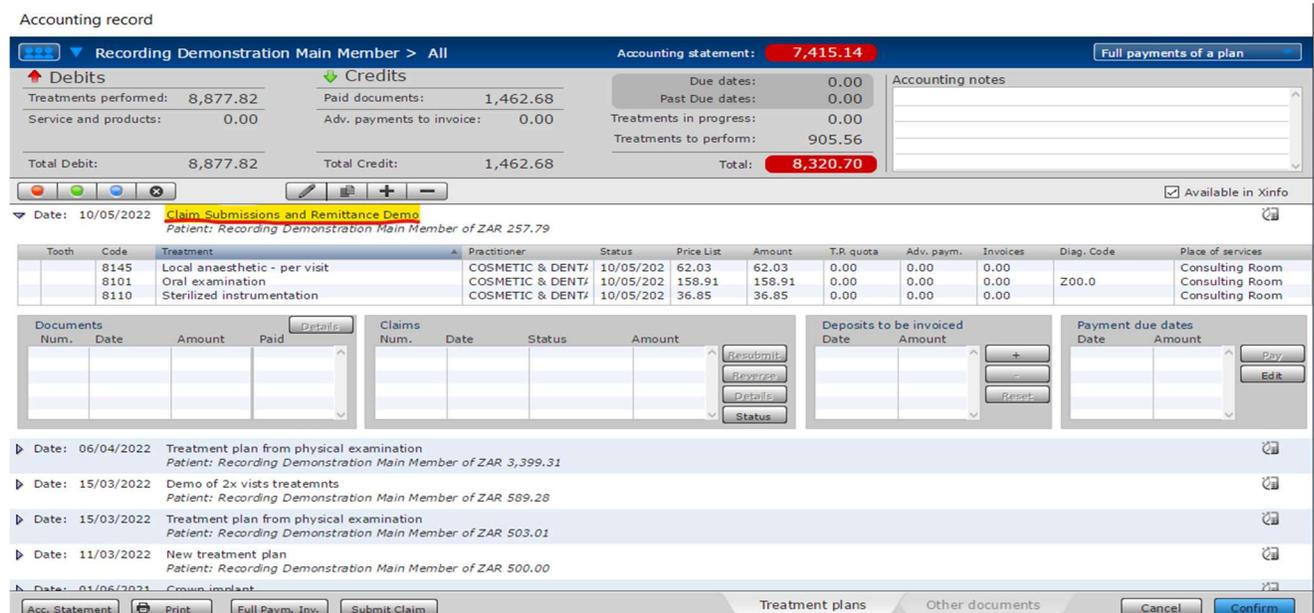


FIG. 1 – Performed and Completed Treatment Plan Example

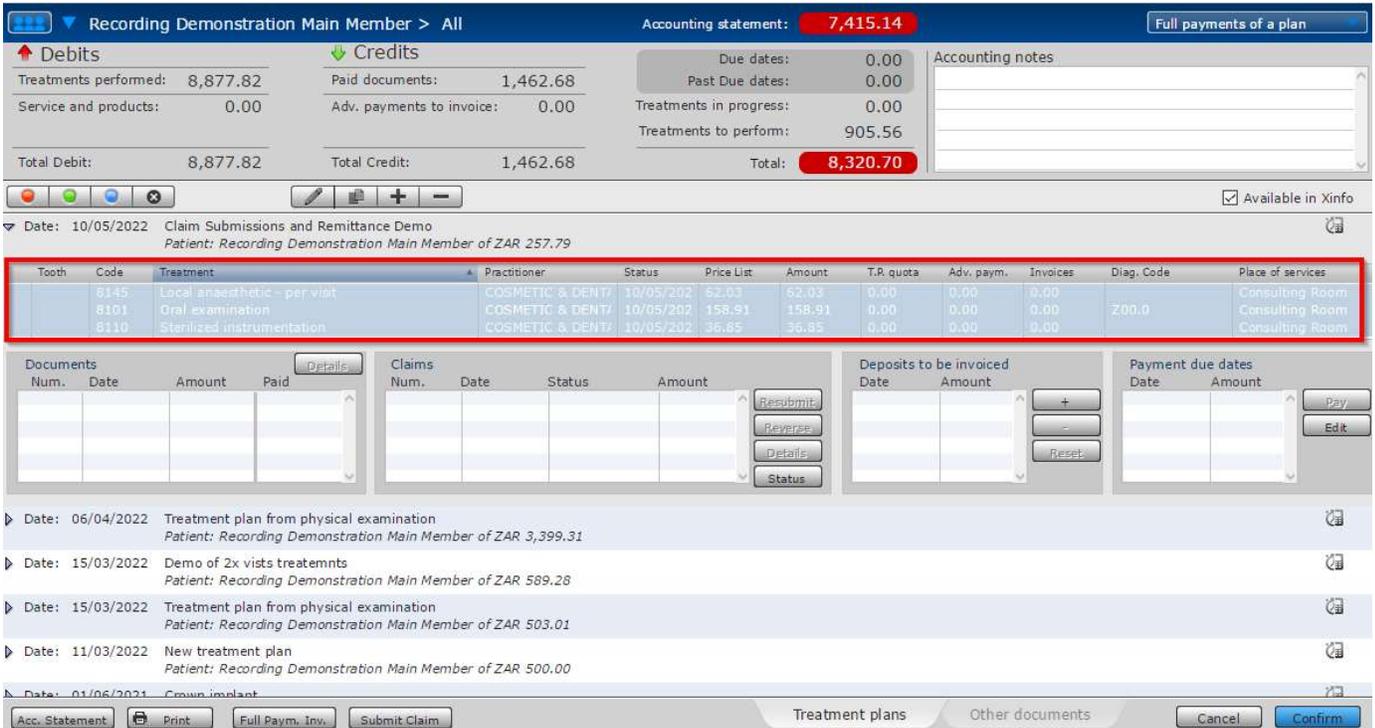
FIG.2 – Accounting record location

- Find the completed Treatment Plan from the list displayed on the next screen. In this example the Treatment Plan was renamed to “Claim Submission and Remittance Demo”



- Select the treatments that needs to be submitted from this Treatment Plan – You will see that Xdent will highlight these once you click on them.

Accounting record



Recording Demonstration Main Member > All      Accounting statement: **7,415.14**      Full payments of a plan

**Debits**      **Credits**

Treatments performed:	8,877.82	Paid documents:	1,462.68	Due dates:	0.00	Accounting notes			
Service and products:	0.00	Adv. payments to invoice:	0.00	Past Due dates:	0.00				
Treatments in progress:	0.00								
Treatments to perform:	905.56								
<b>Total Debit:</b>	<b>8,877.82</b>	<b>Total Credit:</b>	<b>1,462.68</b>	<b>Total:</b>	<b>8,320.70</b>				

Date: 10/05/2022      Claim Submissions and Remittance Demo  
Patient: Recording Demonstration Main Member of ZAR 257.79

Tooth	Code	Treatment	Practitioner	Status	Price List	Amount	T.R. quota	Adv. paym.	Invoices	Diag. Code	Place of services
	8145	Local anaesthetic - per visit	COSMETIC & DENT/	10/05/202	62.03	62.03	0.00	0.00	0.00		Consulting Room
	8101	Oral examination	COSMETIC & DENT/	10/05/202	158.91	158.91	0.00	0.00	0.00	Z00.0	Consulting Room
	8110	Sterilized instrumentation	COSMETIC & DENT/	10/05/202	36.85	36.85	0.00	0.00	0.00		Consulting Room

Documents      Claims      Deposits to be invoiced      Payment due dates

Date: 06/04/2022      Treatment plan from physical examination  
Patient: Recording Demonstration Main Member of ZAR 3,399.31

Date: 15/03/2022      Demo of 2x visits treatemnts  
Patient: Recording Demonstration Main Member of ZAR 589.28

Date: 15/03/2022      Treatment plan from physical examination  
Patient: Recording Demonstration Main Member of ZAR 503.01

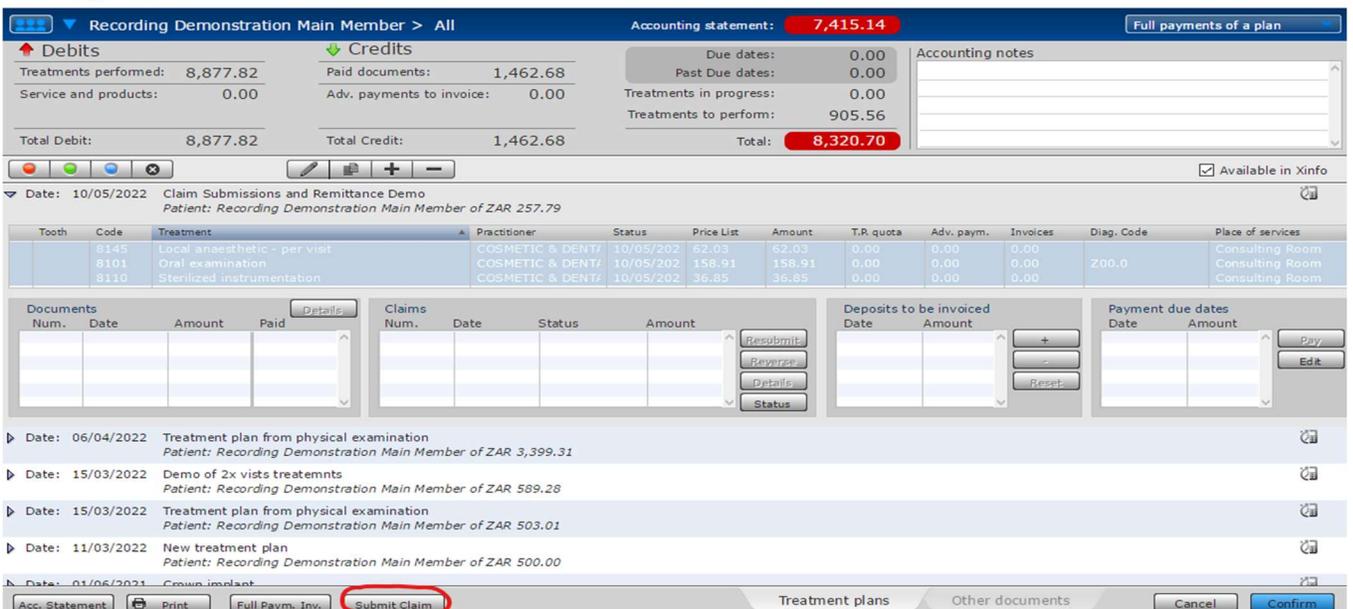
Date: 11/03/2022      New treatment plan  
Patient: Recording Demonstration Main Member of ZAR 500.00

Date: 01/06/2021      Crown implant

Acc. Statement      Print      Full Paym. Inv.      Submit Claim      Treatment plans      Other documents      Cancel      Confirm

- Once the required Treatments have been highlighted, select the *Submit Claim* option at the bottom of this page – The system will then start the claim submission process, go through a few validation steps with and then submit the claim of to the Medical Aid in Real-Time.

Accounting record



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Date: 11/03/2022      New treatment plan  
Patient: Recording Demonstration Main Member of ZAR 500.00

Date: 01/06/2021      Crown implant

Acc. Statement      Print      Full Paym. Inv.      **Submit Claim**      Treatment plans      Other documents      Cancel      Confirm