On time, every time

MEDICAL AID PROCESSING

CGM MEDEDI

Billing and Practice Management

MEDICAL BILLING

TRAINING MANUAL

brought to you by CGM CompuGroup Medical

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Introduction to Medical Billing

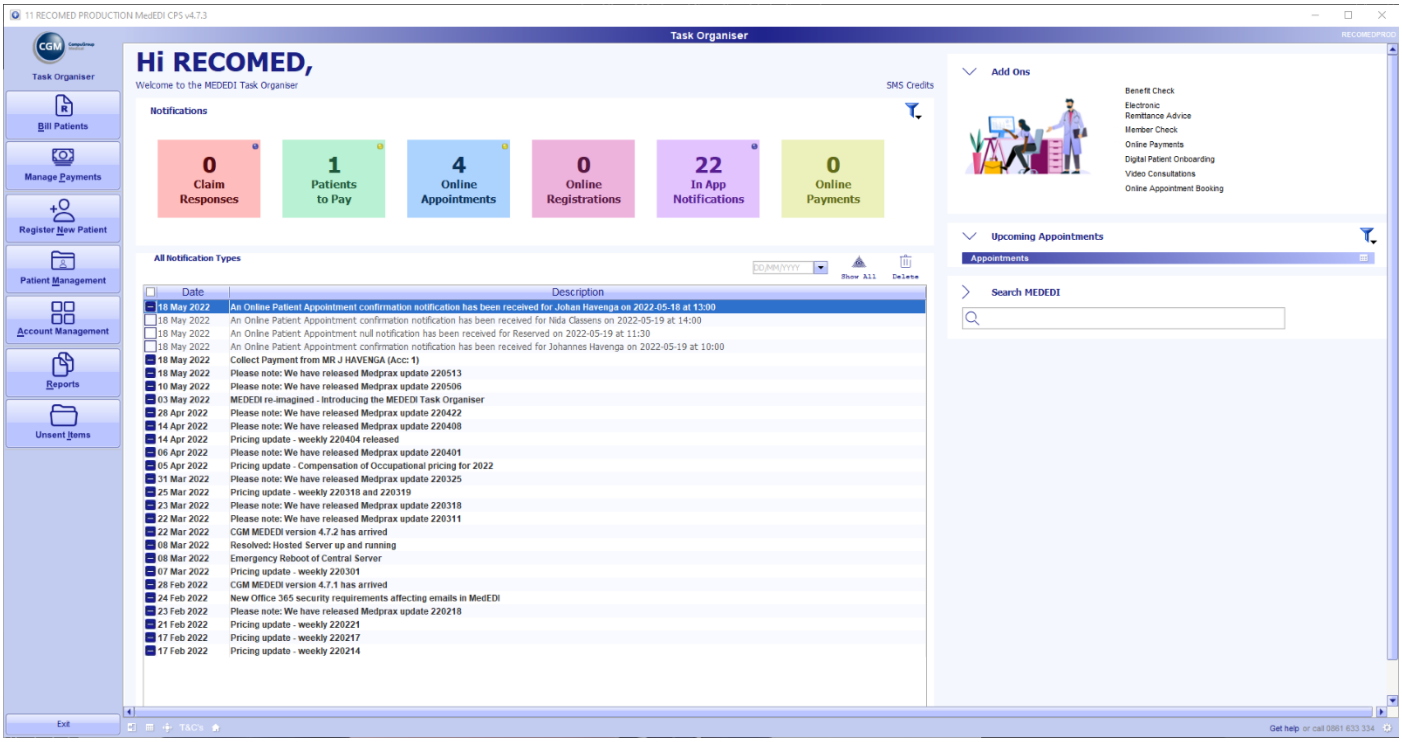
We know that medical billing and claims take up too much of your time! With fully integrated MEDEDI you can process ICD-10 codes and send medical aid claims in real-time knowing exactly what's covered, giving your patients transparency regarding their medical fees. Experience a fully automated ERA and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

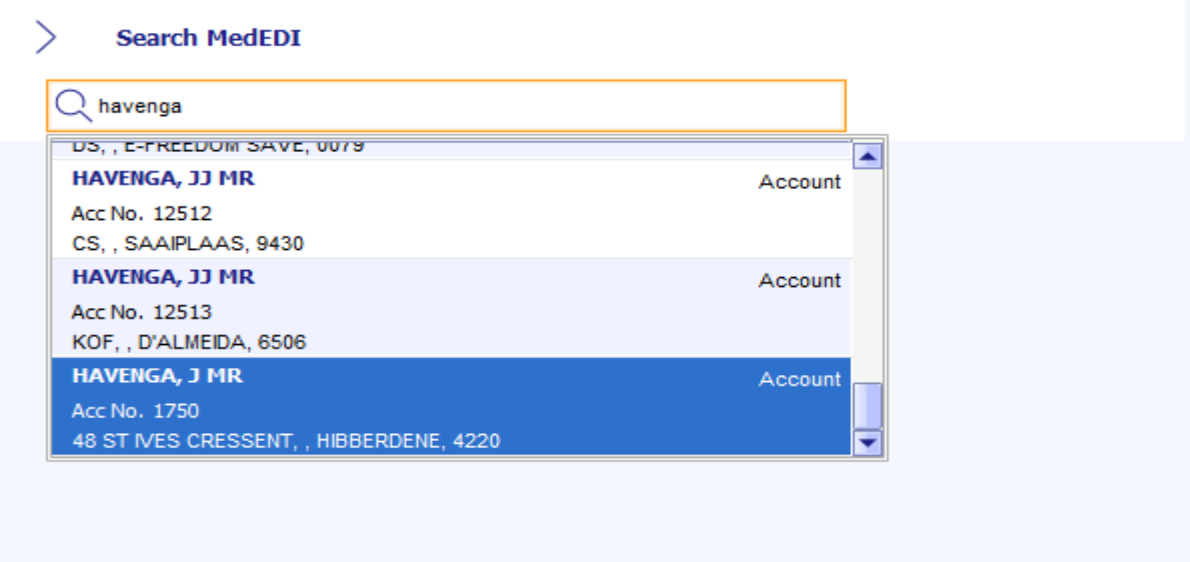
Billing from the MEDEDI Task Organiser search functionality

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.

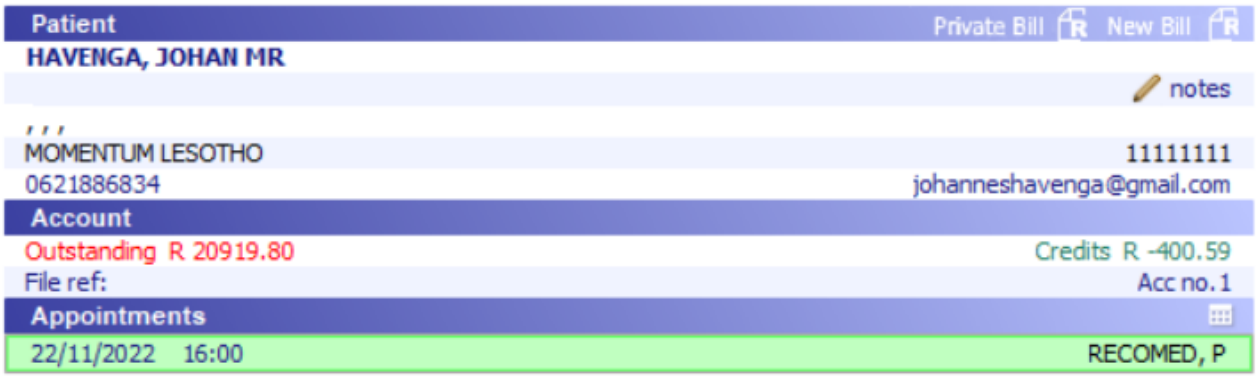
The following figure (figure 1) will be the new screen that will be displayed.



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



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



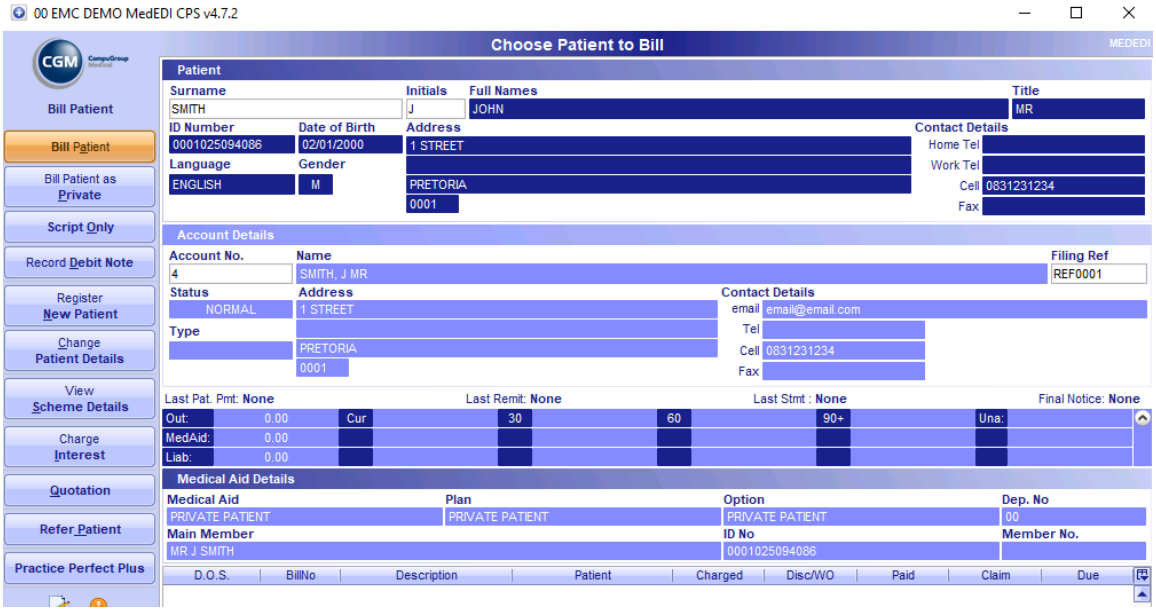
Private Bill will open the Private Billing screen where the patient will be billed as private.

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

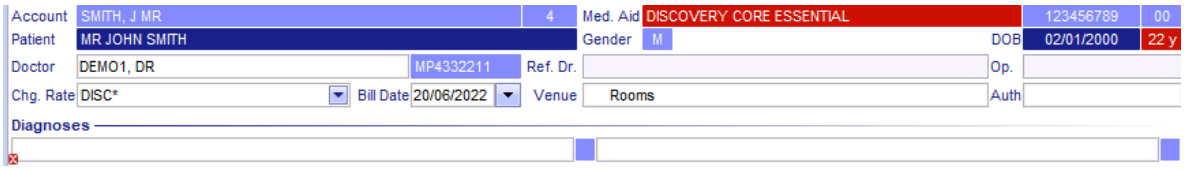
Billing a patient from Medical Aid using the MEDEDI CPS Administrator

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

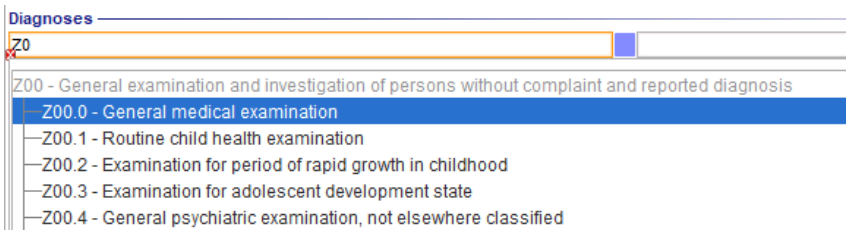
2. Here you can search for a patient either by Surname or by Account number. Once correct Patient has been selected, click on the 'Bill Patient' button.



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).

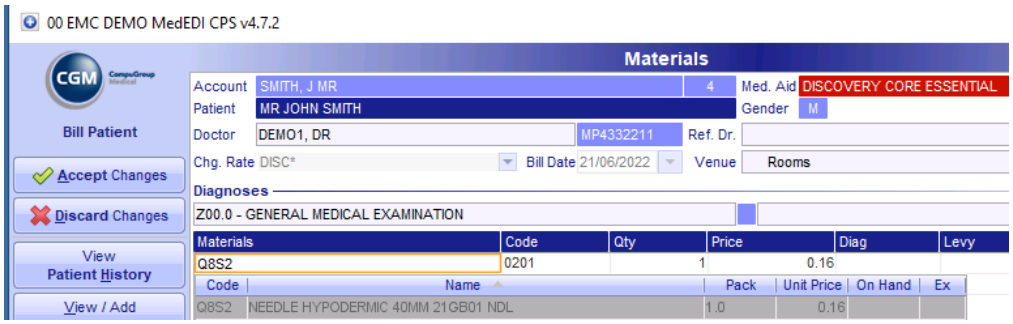


4. Now add in the diagnoses codes. MEDEDI allows for up to 8 codes to be added. The diagnoses can either be typed in by code (recommended) or by typing word.



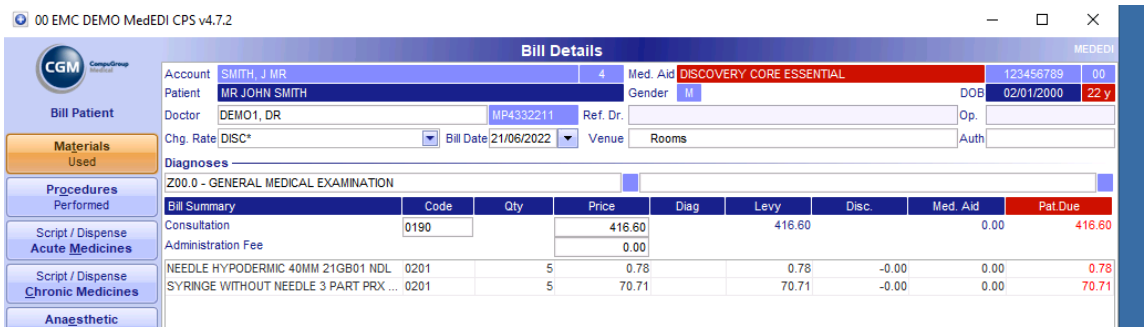
5. Next option is to add in Materials used (if applicable). Click on the 'Materials Used' button.

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



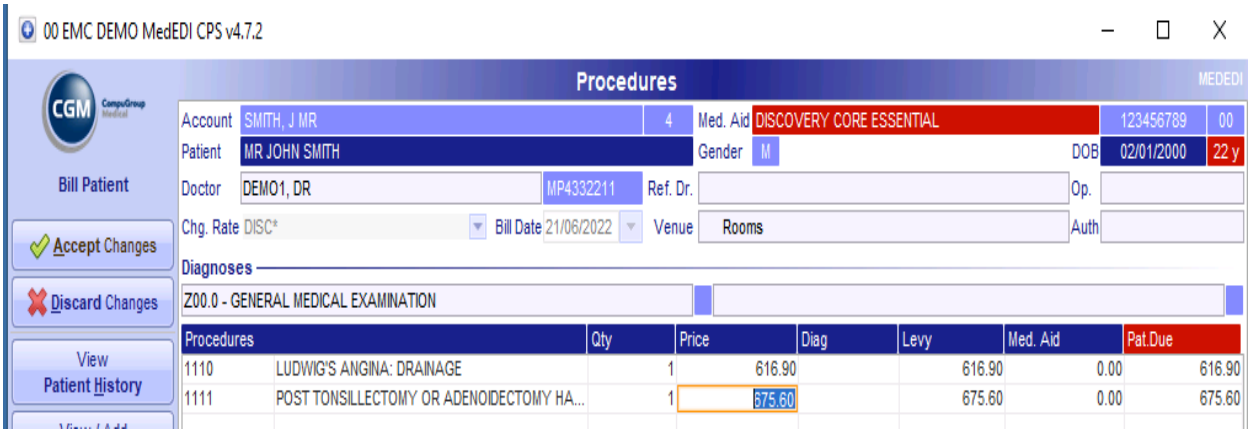
7. Adjust the quantity of materials used and then add additional lines

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

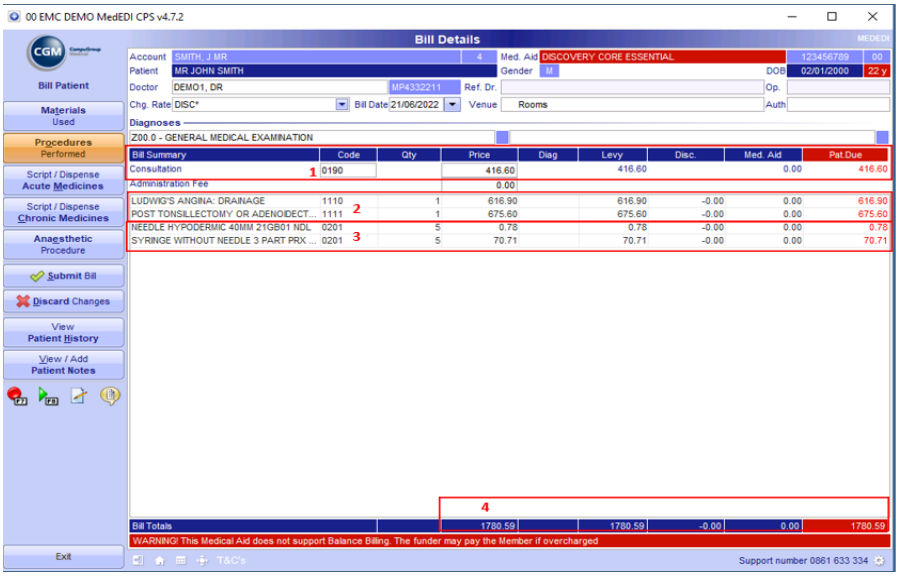


9. Next option is to ad in procedure performed (if applicable). Click on the ‘Procedures Performed’ button.

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

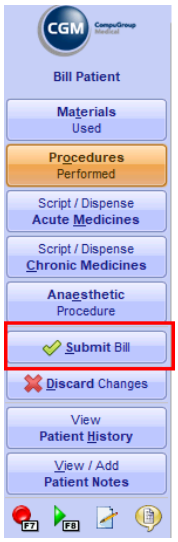


11. Click on 'Accept Changes' to add all Procedures conducted and return to main billing screen. The Bill is now ready to be checked to see if all information has been added before submission of the bill.



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

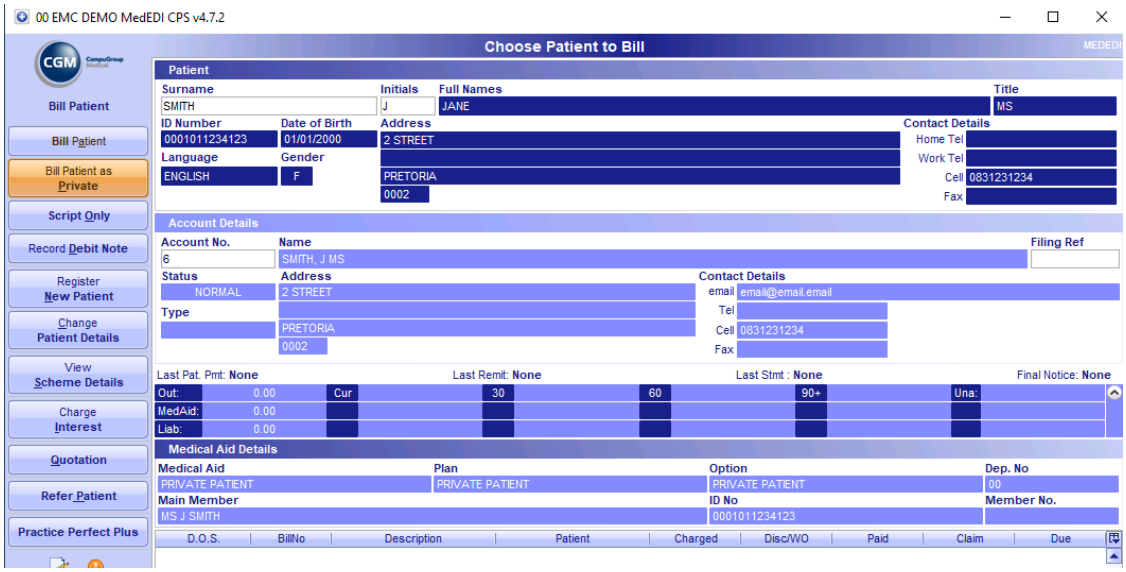
12. Once the bill has been checked and is ready to finalize, click on the 'Submit Bill' button to send through to the relevant Medical Aid. The bill will be submitted, and a response will be generated.



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.



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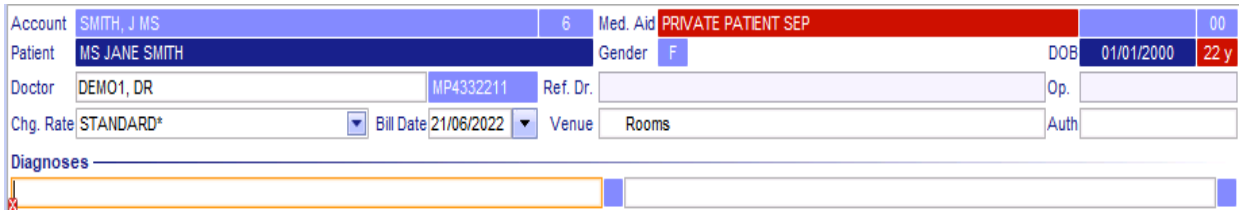

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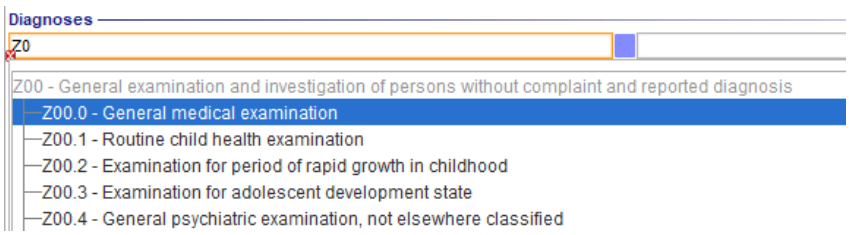

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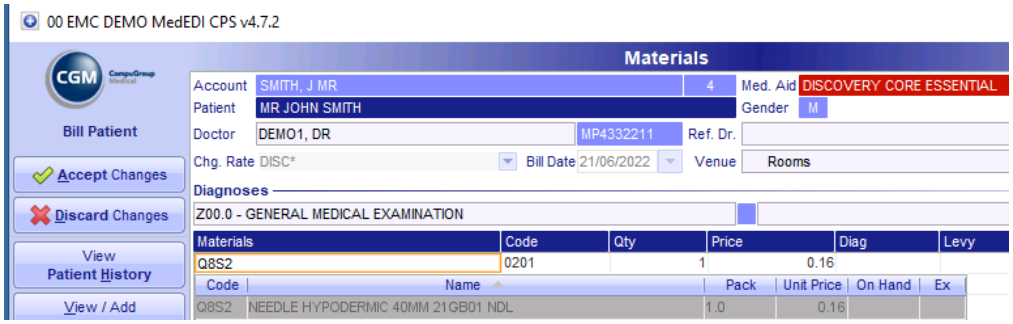
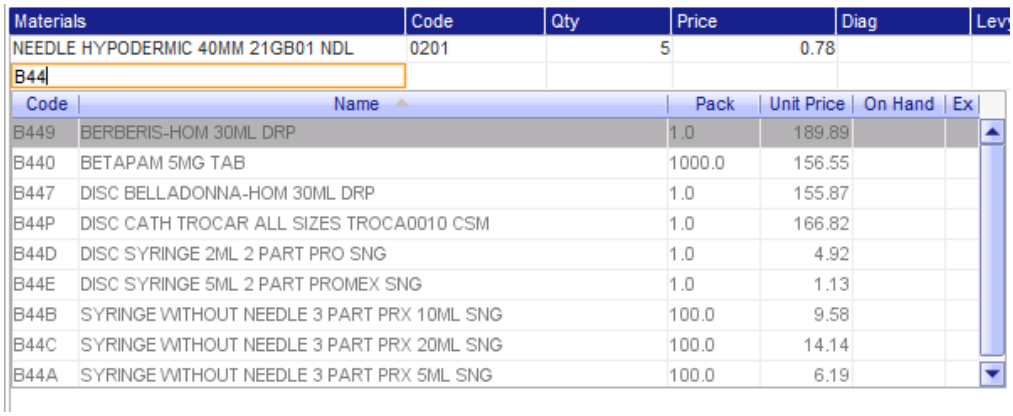
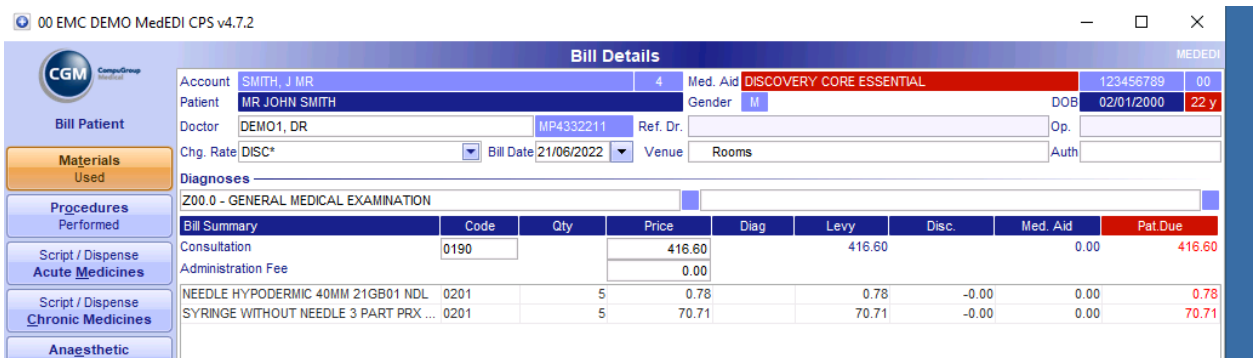


7. Adjust the number of materials used and then add additional lines.



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



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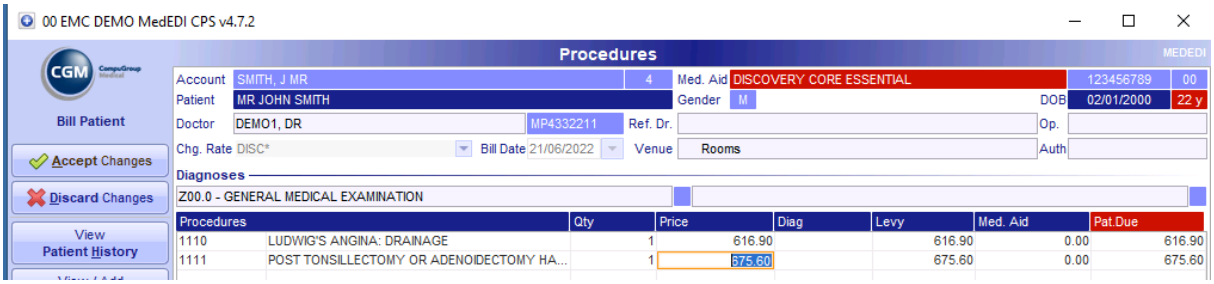

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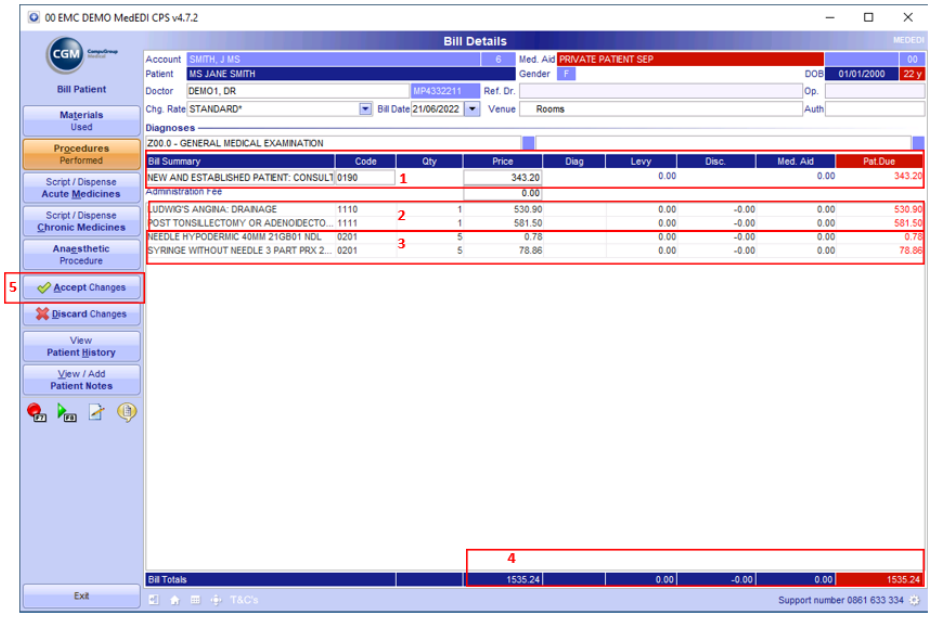
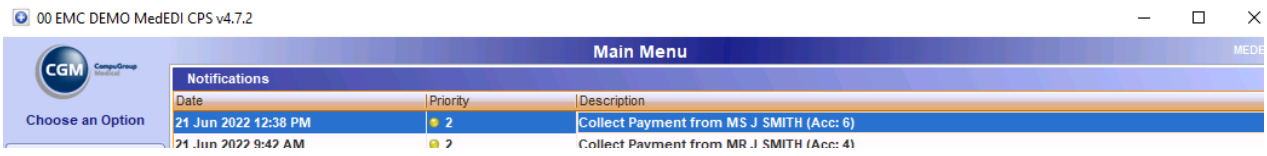


1	Consulation code (will appear by default)
2	Procedure(s) performed
3	Materials used
4	Bill total
5	Accept and Finalize Bill

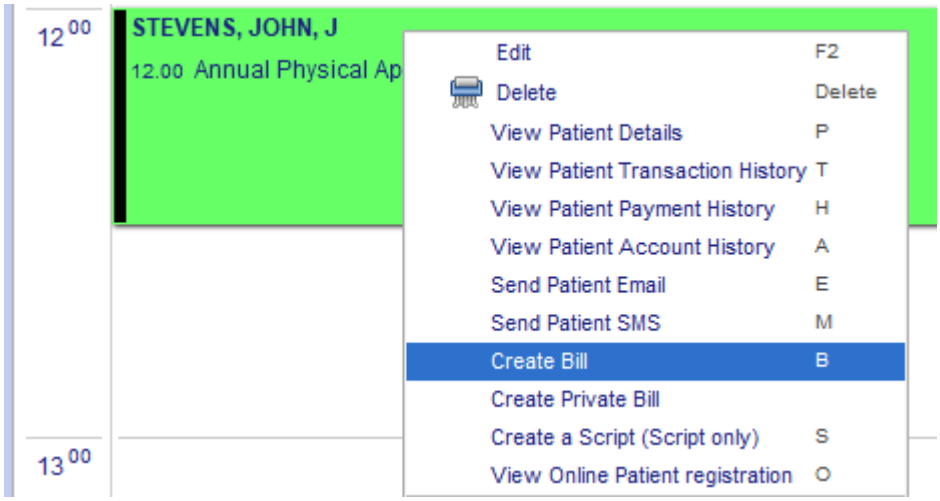
12. Once the bill has been checked and is ready to finalize, click on the 'Accept Changes' button to finalize and create the bill. The bill will be created, and a notification will be created on the main menu to collect payment.



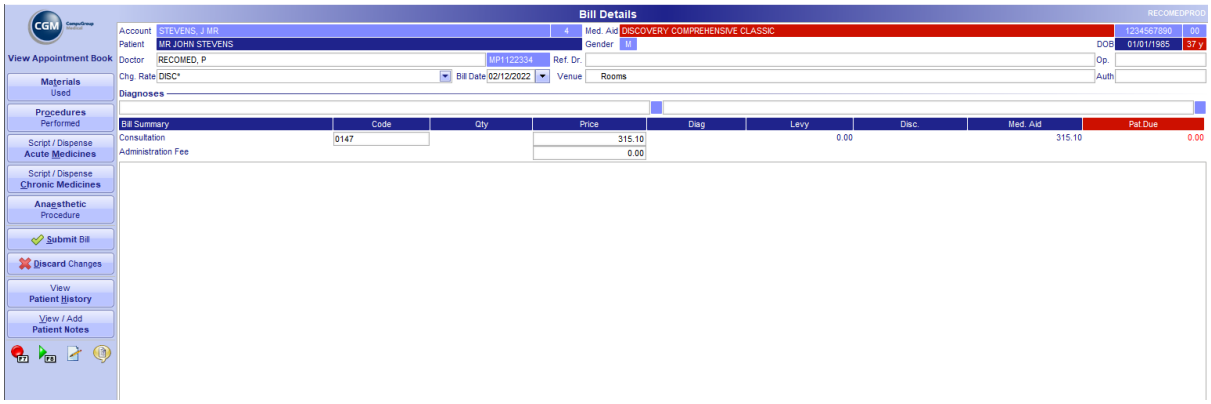
Billing patient from the Calendar

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.

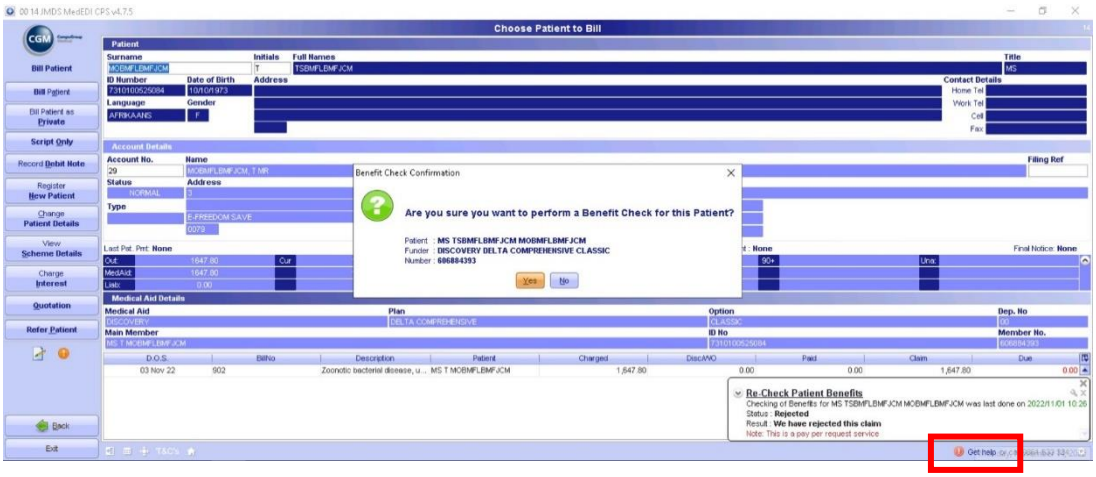


3. Depending on whether you have selected to Bill the Patient or Bill the Patient Privately you can either Submit the Bill to the Medical Aid or select to Accept the Bill that will make the Patient Liable for the Payment.
4. Bill Patient, submitting to the Medical Aid Scheme will allow you to receive 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.

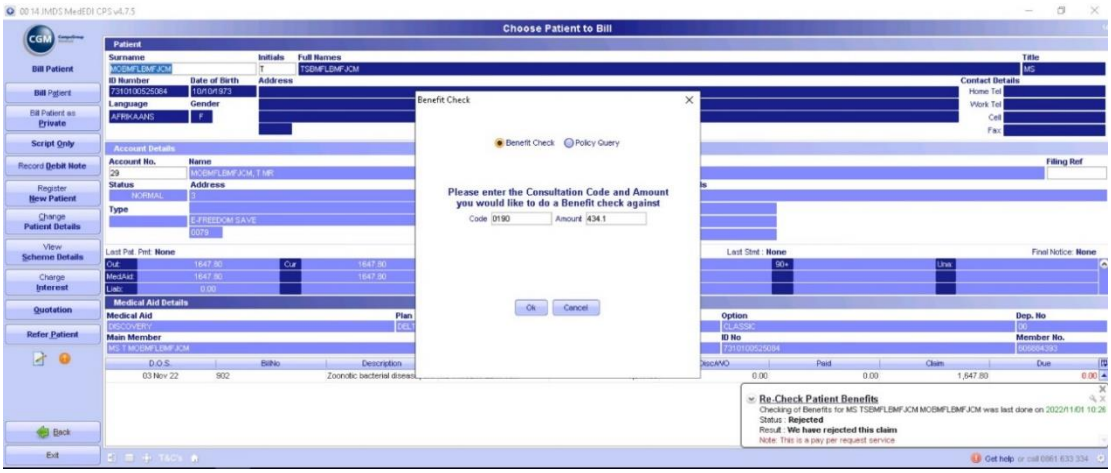
You will see a pop-up asking whether you are sure you would like to perform a benefit check, click "yes".



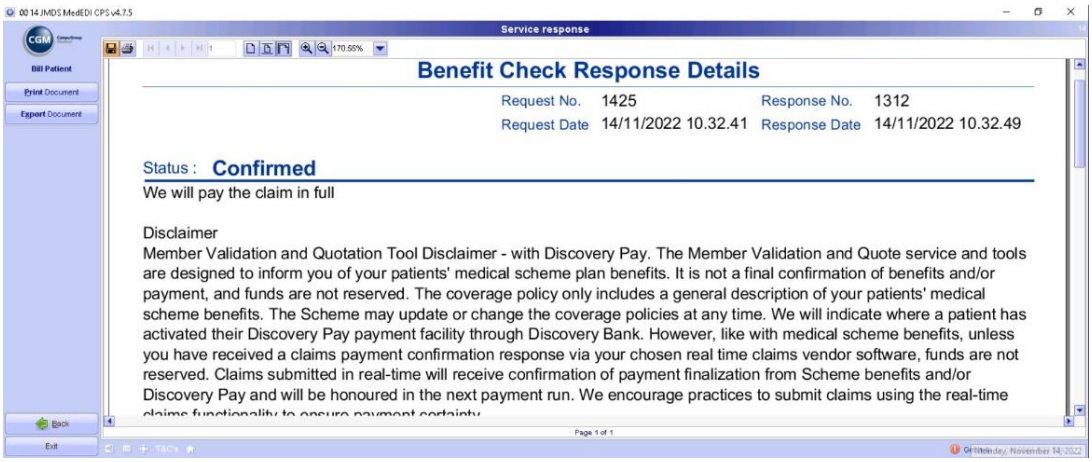
Performing a Benefit Check:

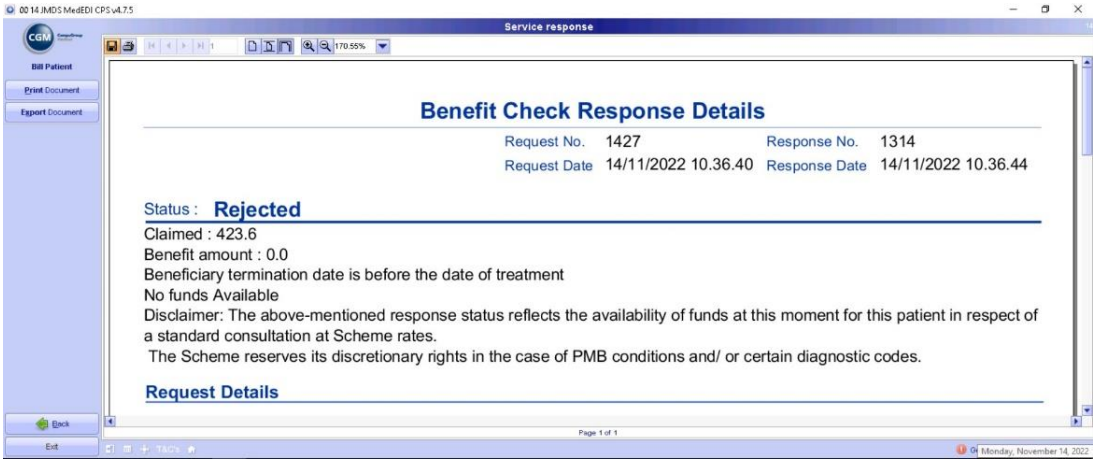
When you click yes, the Benefit Check pop-up will appear, click on Benefit Check.

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.

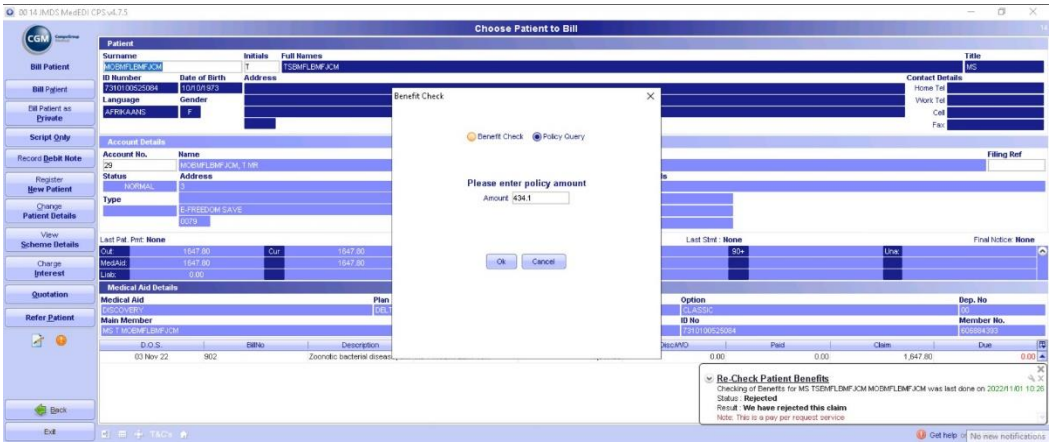




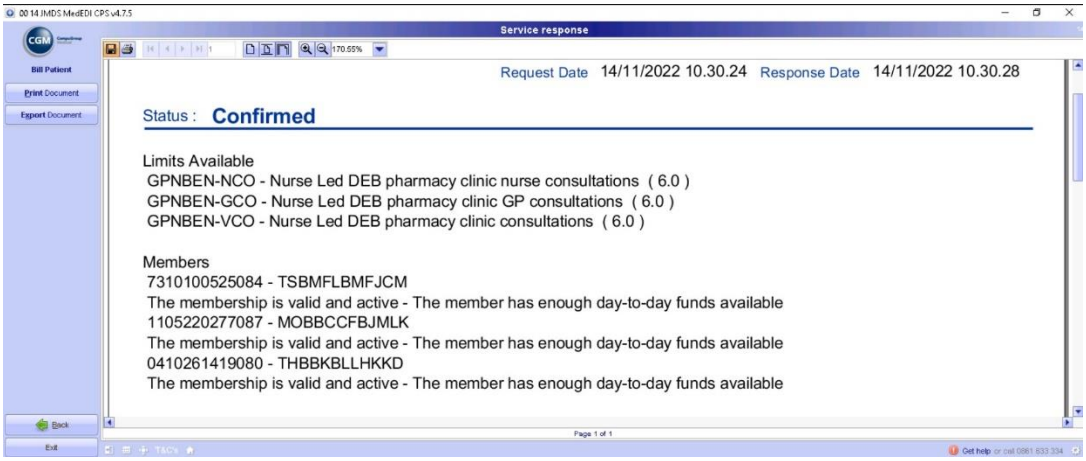
Performing a Policy query for Discovery members only:

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.



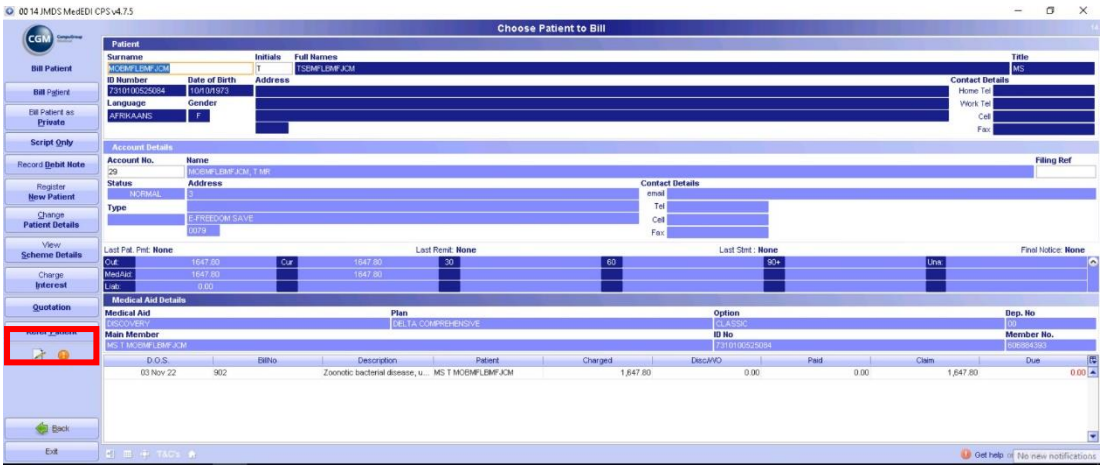
You will receive a real-time response showing you all the patient's Medical Aid limit balances as well as other members/patients linked to this patient's medical aid.



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”

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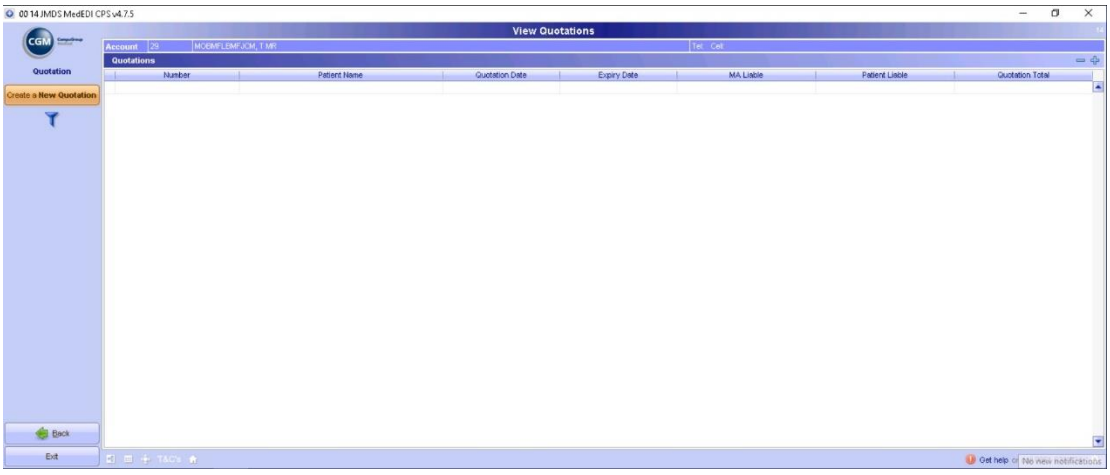
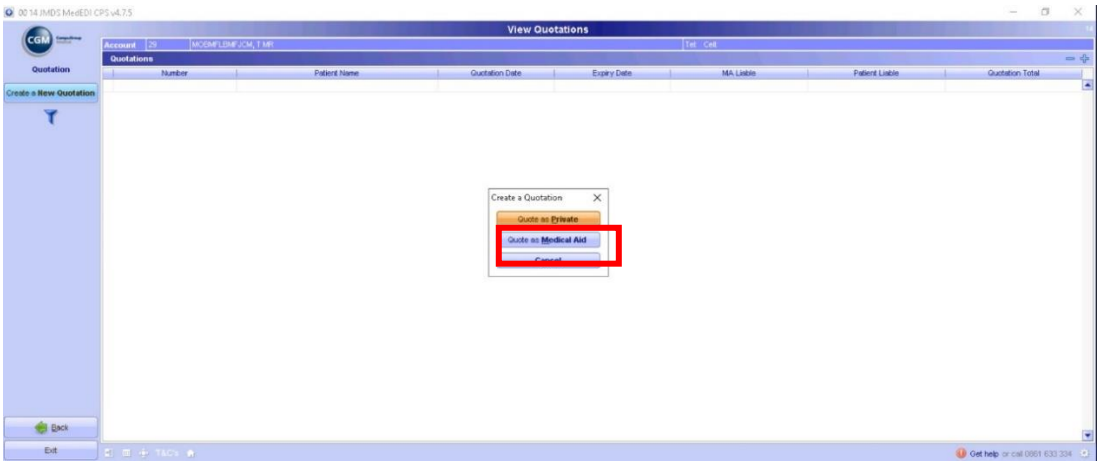
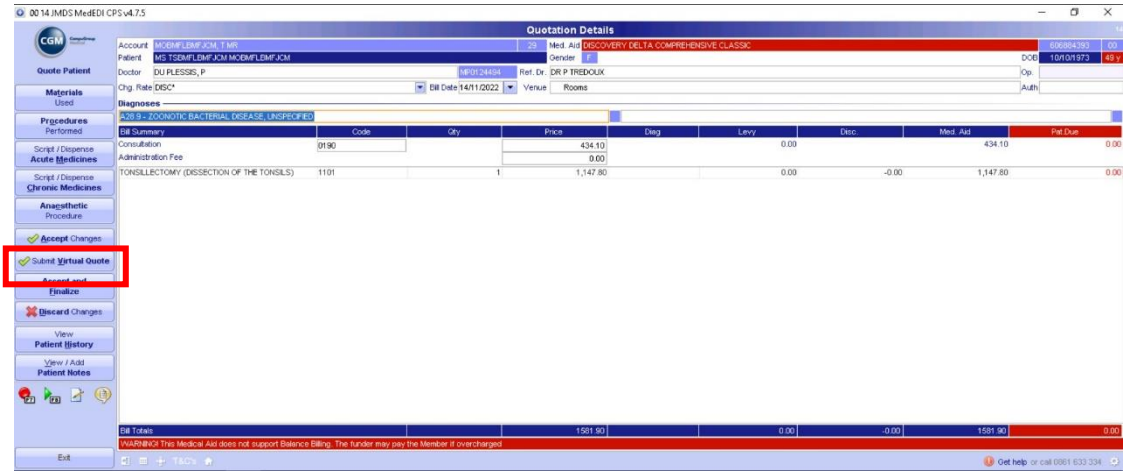


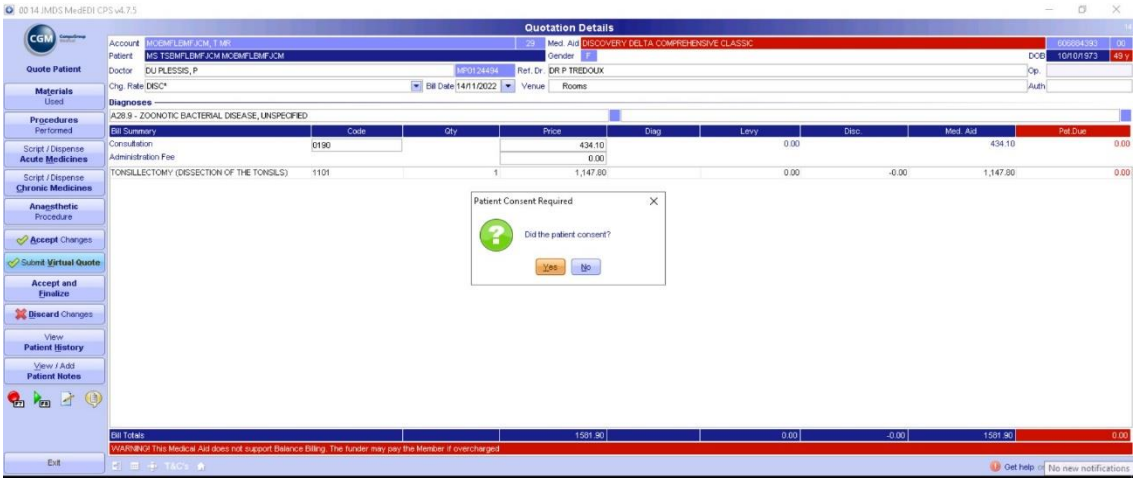
The Create a Quotation pop-up will open, select, “Quote as Medical Aid”



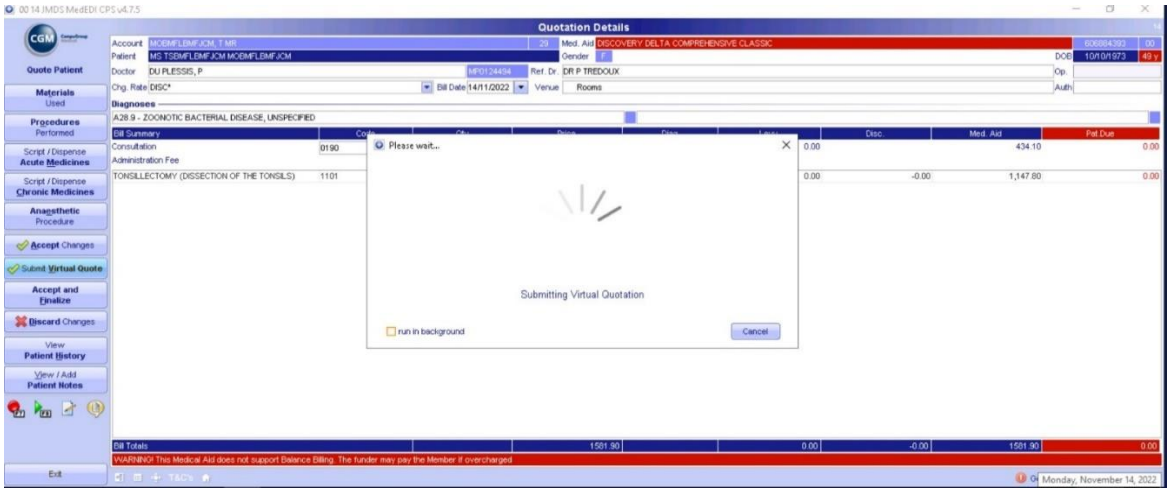
You can now go ahead and populate the quotation screen with the necessary details for the patient to create the quote e.g Medical Aid, Diagnosis, Consultation codes etc. Once you have completed all the details, click “Submit virtual quote” in the left menu.



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”

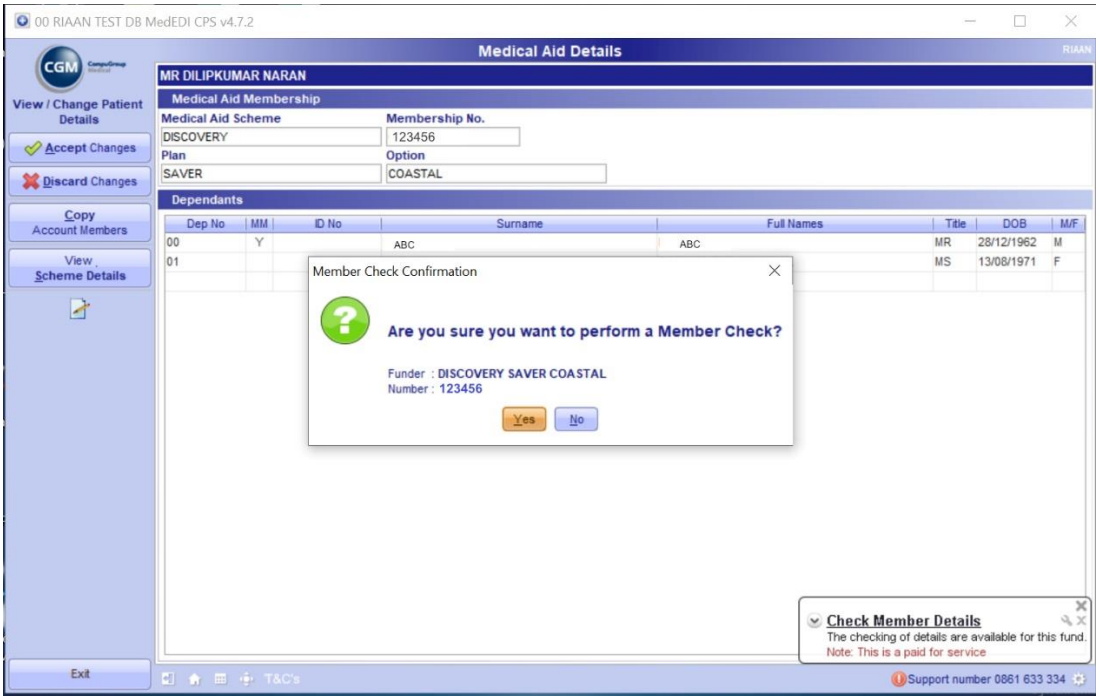


The quotation request is sent to the medical aid and you will receive a real-time response to confirm whether the quote has been approved.

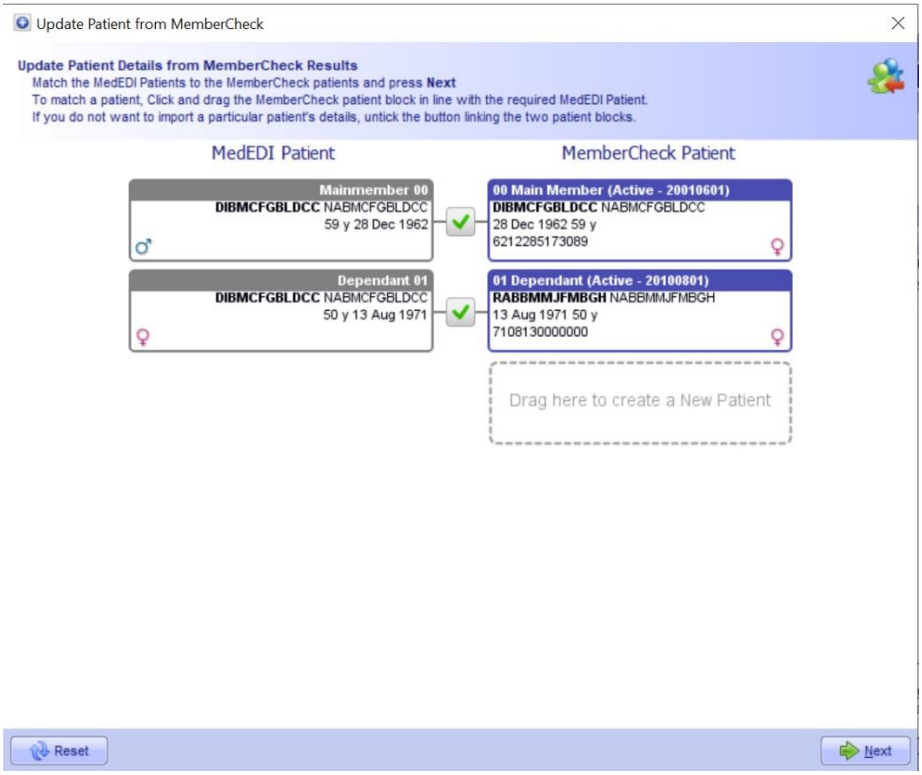


Member Check

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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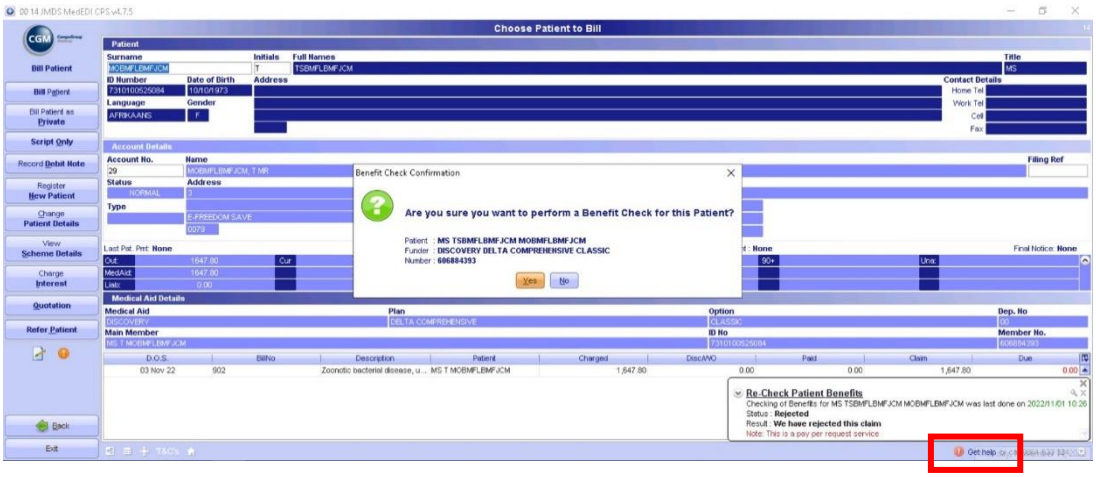

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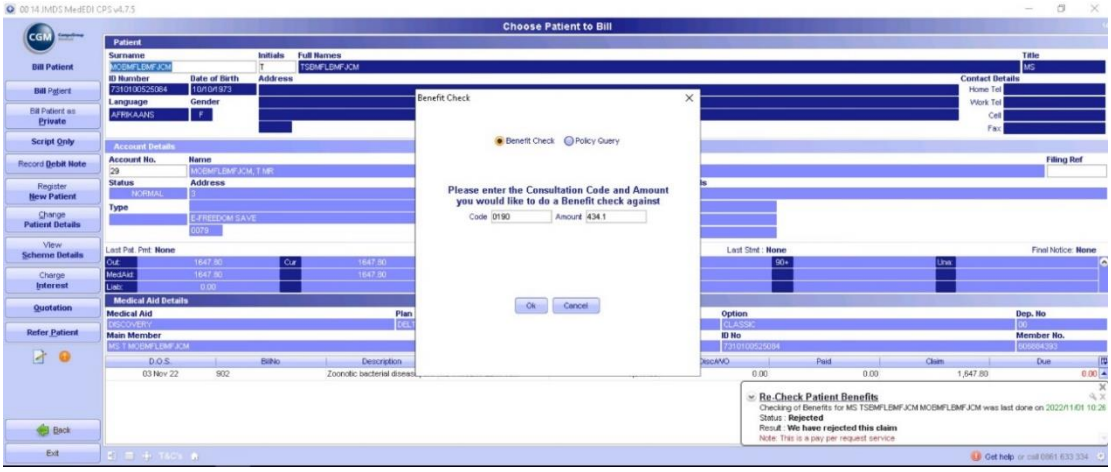
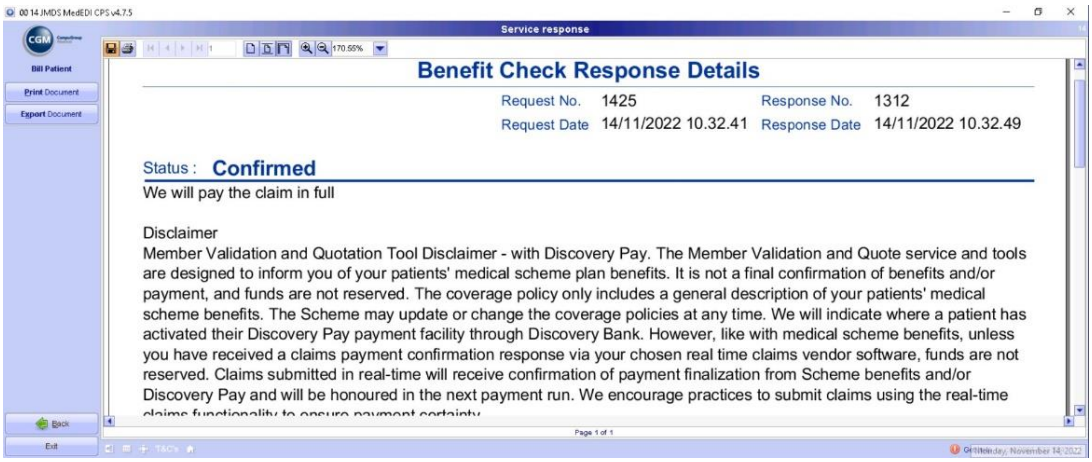
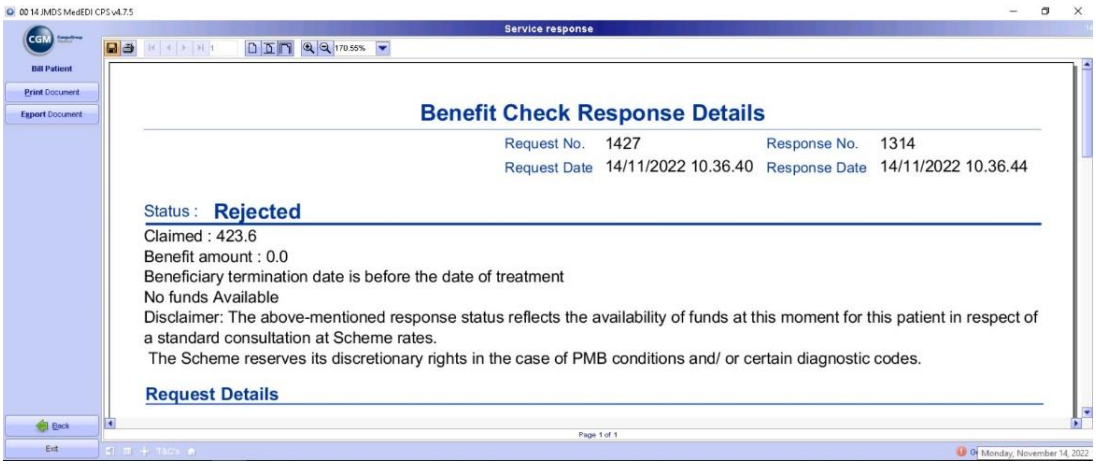


The benefit check is real-time, you will receive a *Benefit Check Response* from Discovery, Medscheme or MHG in a few seconds. If the benefit check is **confirmed**, the medical aid will cover the claim, if it is **rejected** the medical aid will not cover the claim and you will need to bill the patient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

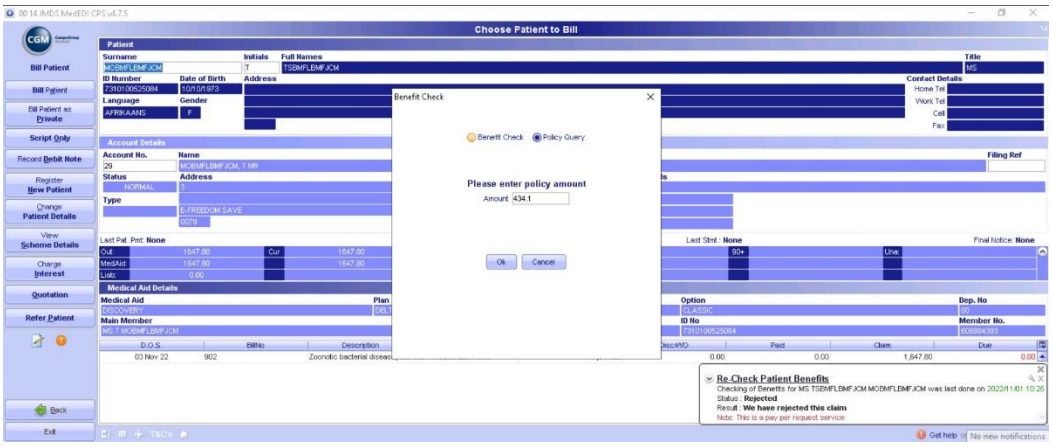




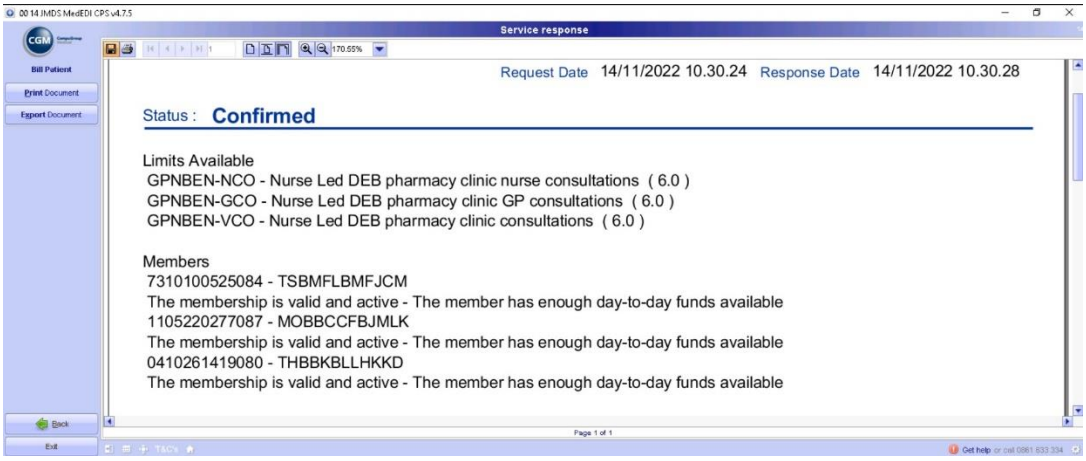
Performing a Policy query for Discovery members only:

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.



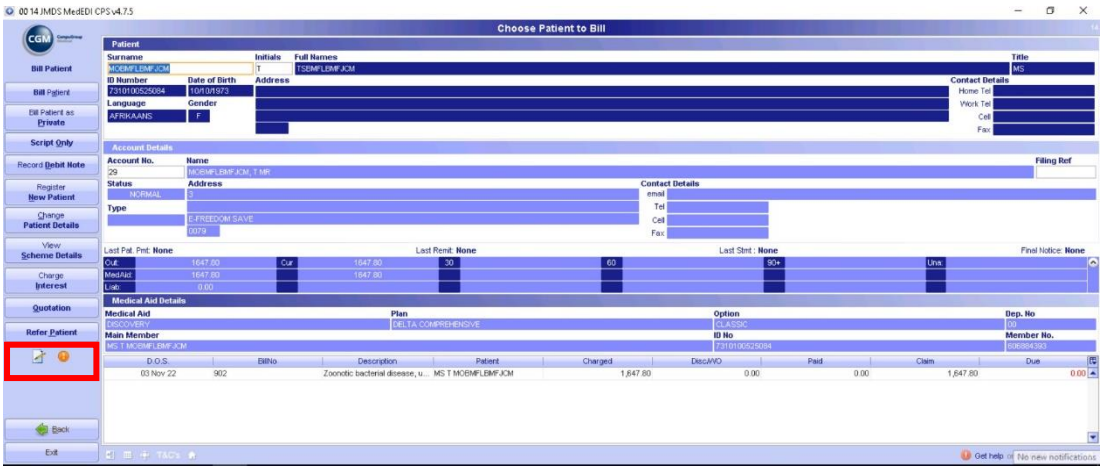
You will receive a real-time response showing you all the patient’s Medical Aid limit balances as well as other members/patients linked to this patient’s medical aid.



Quotations in CGM MEDEDI for Discovery, Medscheme and MHG

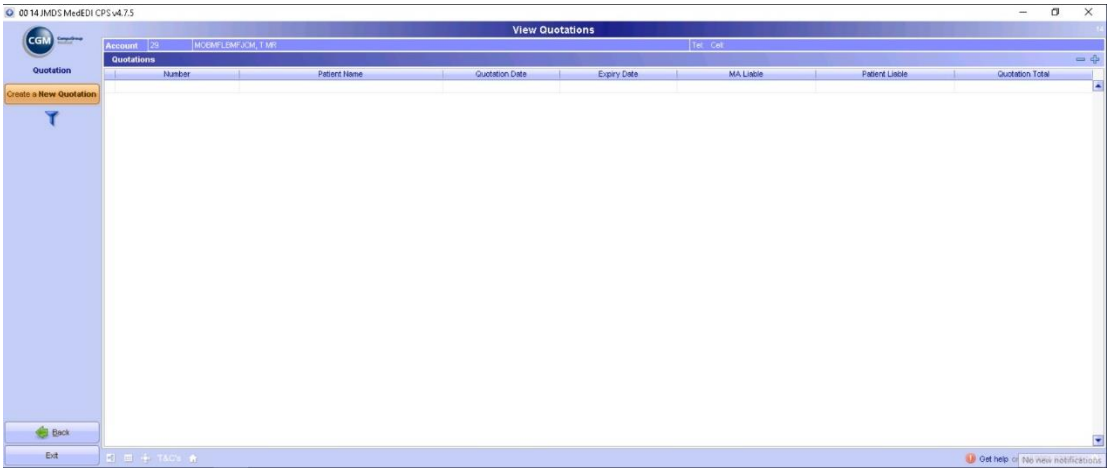
NOTE: before creating a quote you will require patient consent, it is always best to ensure the patient consents to the quote request before kicking off the process.

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

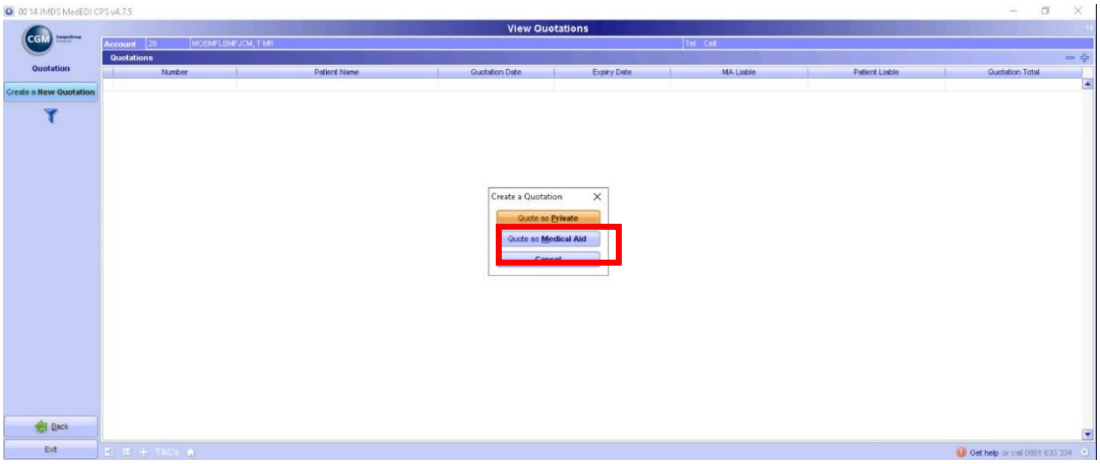


The View Quotations window will open, select, “Create a new quotation”

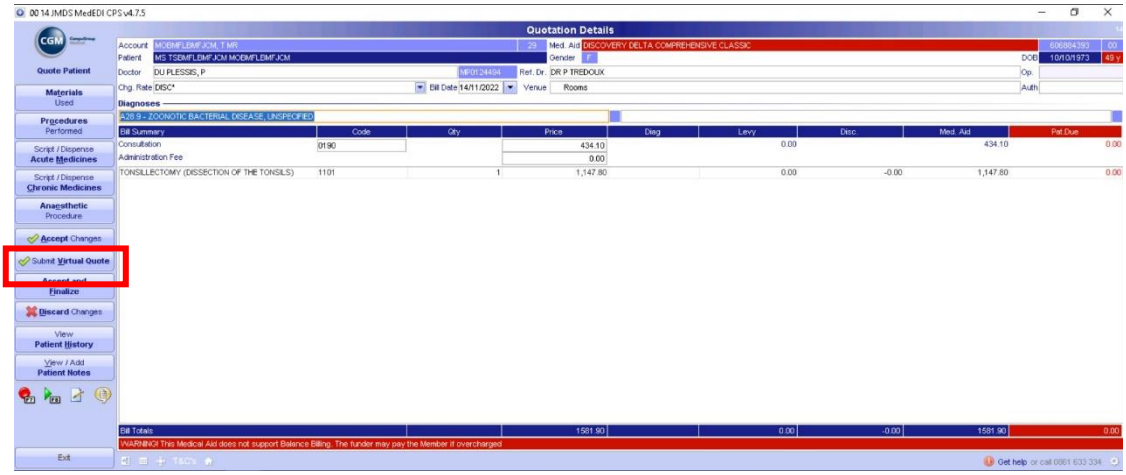
The View Quotation window will open. Select “Create a new quotation”



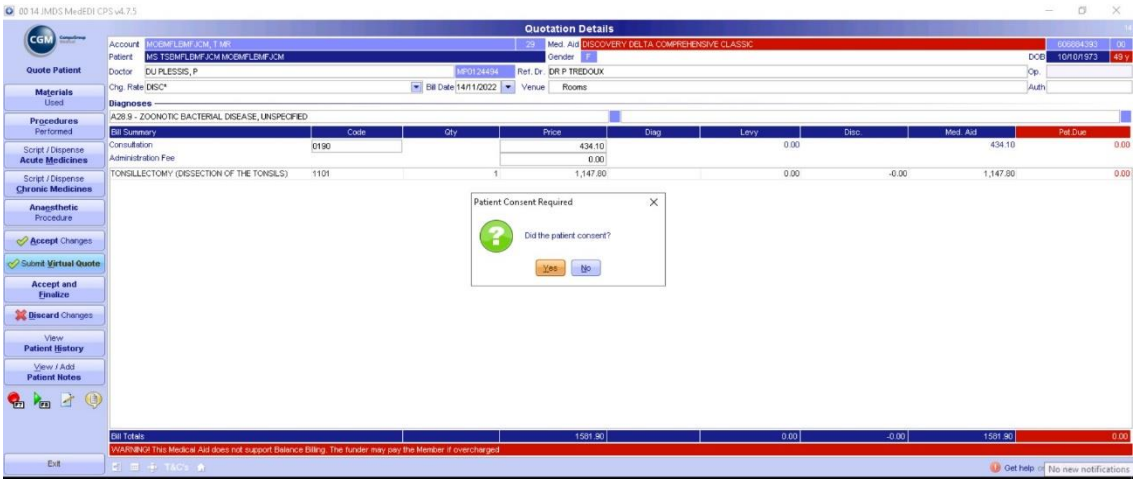
The Create a Quotation pop-up will open, select, “Quote as Medical Aid”



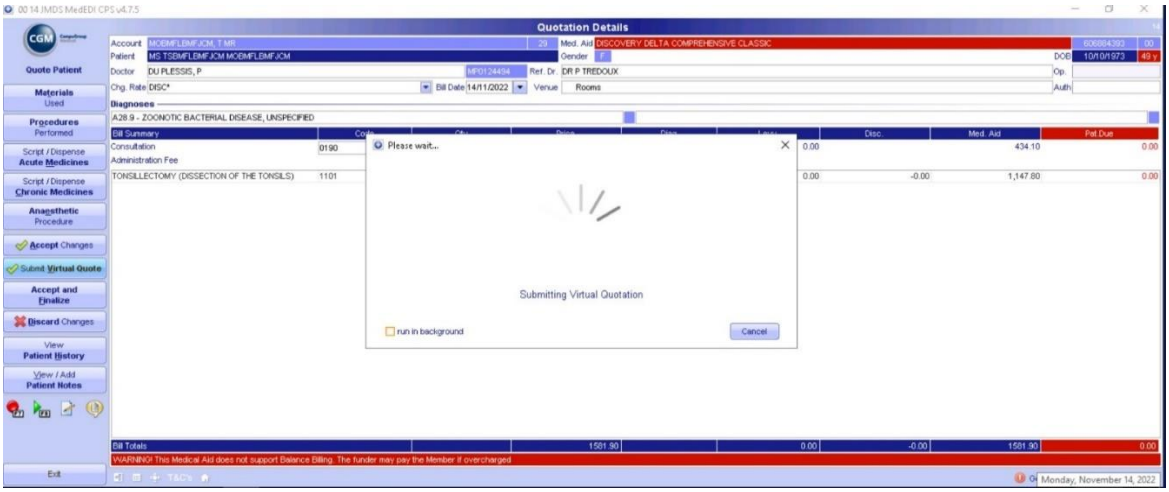
You can now go ahead and populate the quotation screen with the necessary details for the patient to create the quote e.g Medical Aid, Diagnosis, Consultation codes etc. Once you have completed all the details, click “Submit virtual quote” in the left menu.



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”

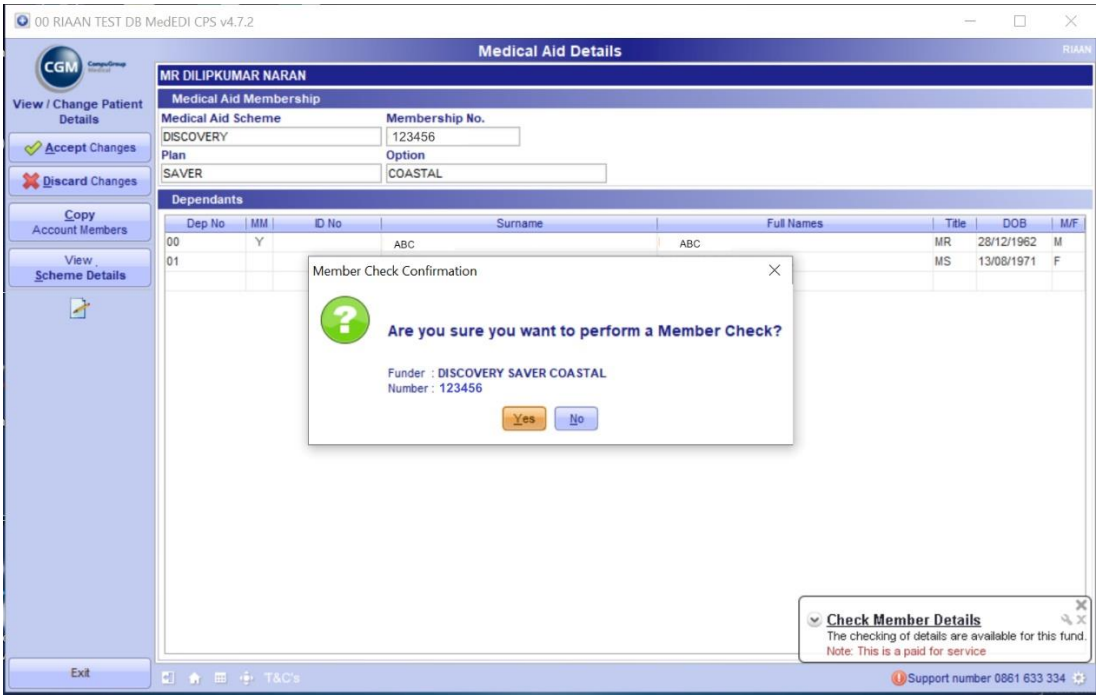


The quotation request is sent to the medical aid and you will receive a real-time response to confirm whether the quote has been approved.

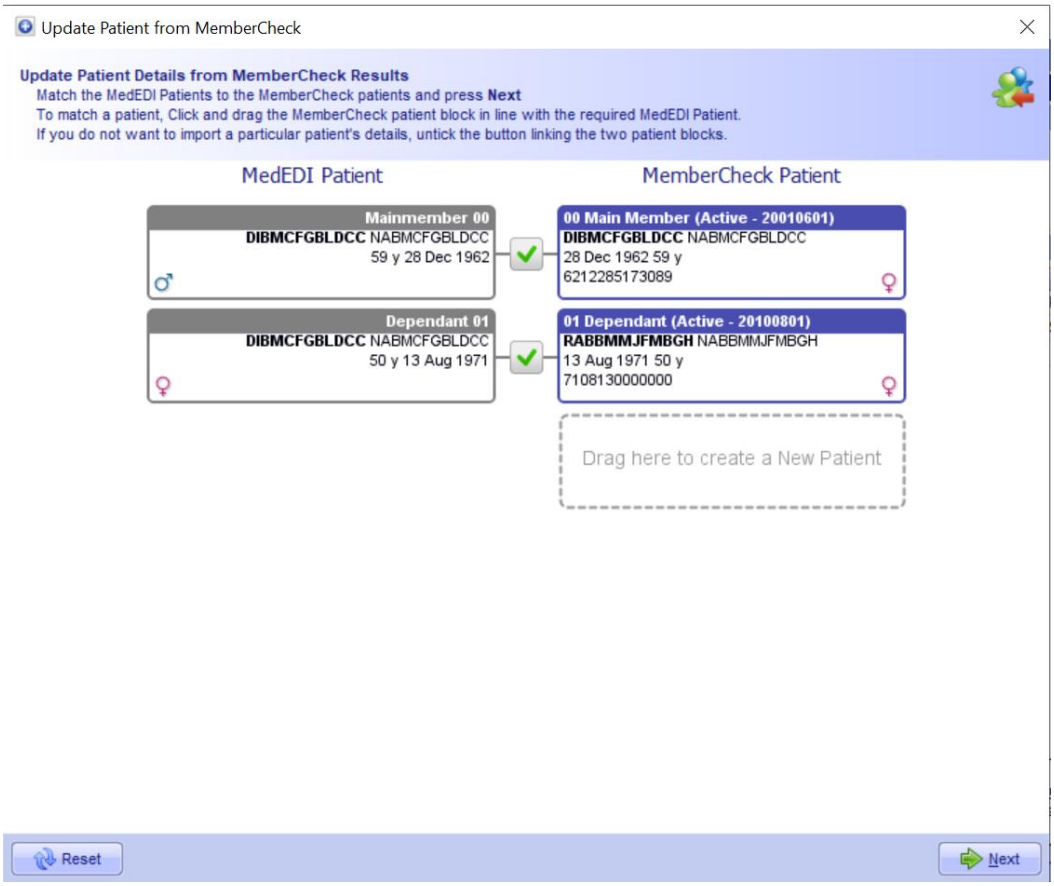


Member Check

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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