

# Streamline

YOUR PRACTICE

# ADMIN

**CGM MEDEDI**

Billing and Practice Management

**Member and Benefit Check and Quotations  
User Manual**

brought to you by



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# Introduction

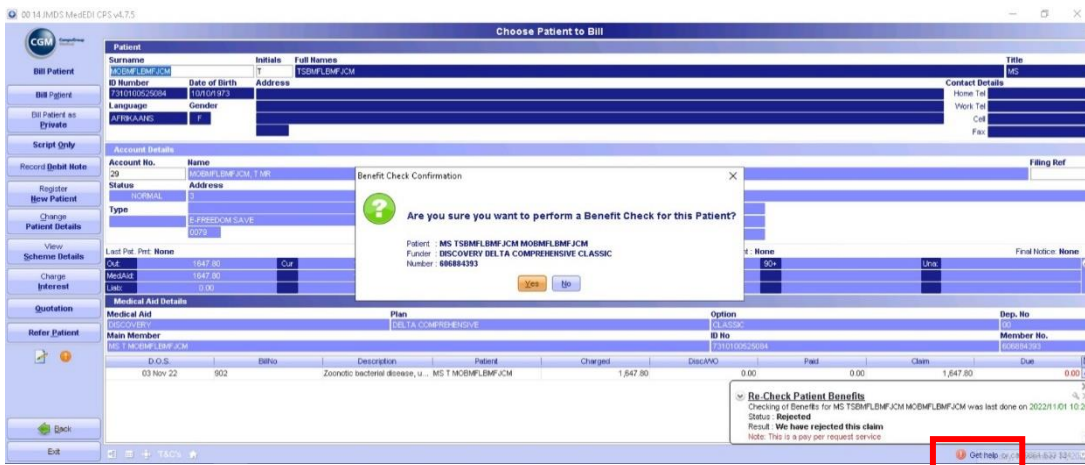
We have improved the CGM MEDEDI Benefit Check and Quotation capabilities to streamline your practice admin. You can now perform a benefit check and receive a real-time response from Discovery, Medscheme and MHG on whether your patient has the necessary funds available to cover their consultation costs, while the Member Check functionality is updated with 160 Medical Schemes.

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.

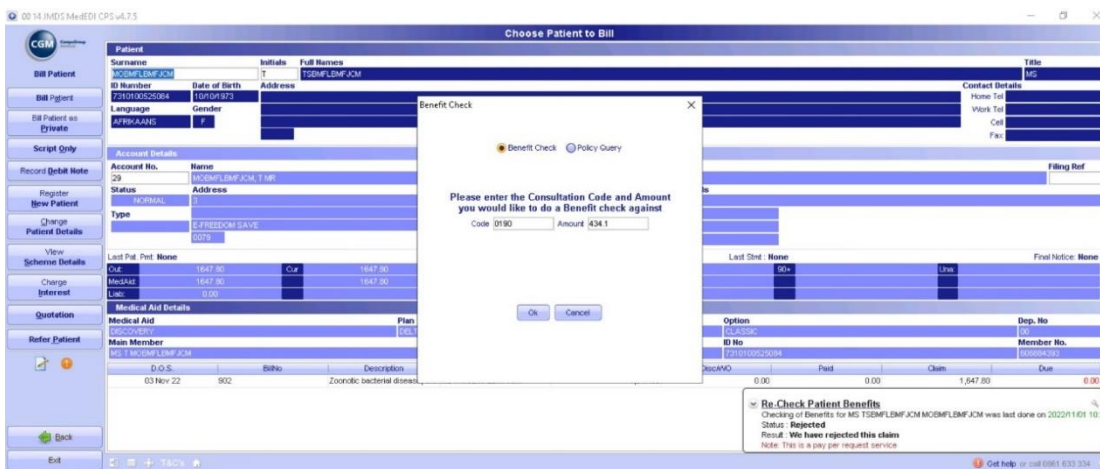
You will see a pop-up asking whether you are sure you would like to perform a benefit check, click "yes".



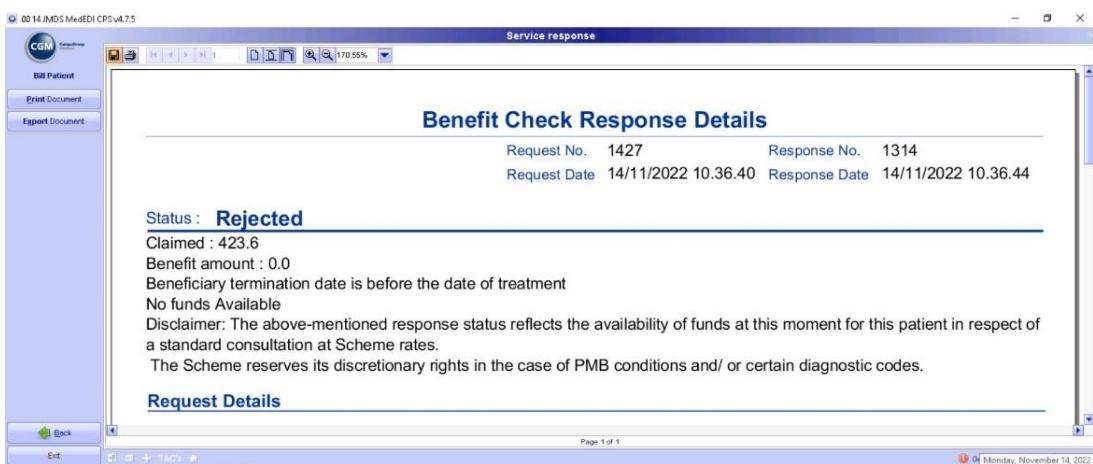
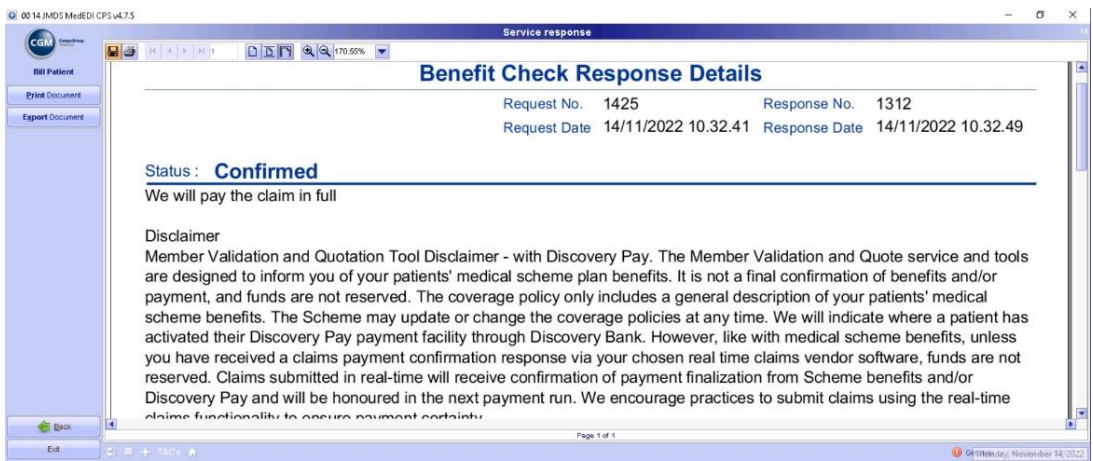
## Performing a Benefit Check:

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.



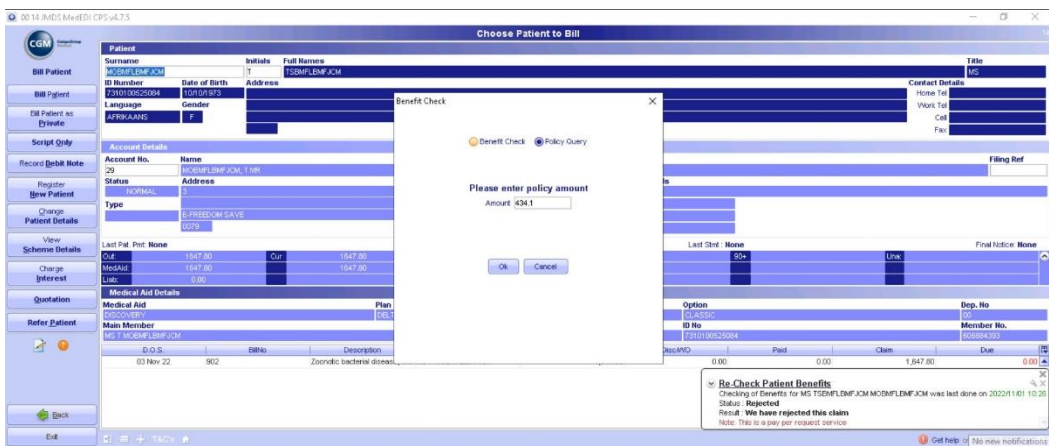
The benefit check is real-time, you will receive a *Benefit Check Response* from Discovery, Medscheme or MHG in a few seconds. If the benefit check is **confirmed**, the medical aid will cover the claim, if it is **rejected** the medical aid will not cover the claim and you will need to bill the patient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

- 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  
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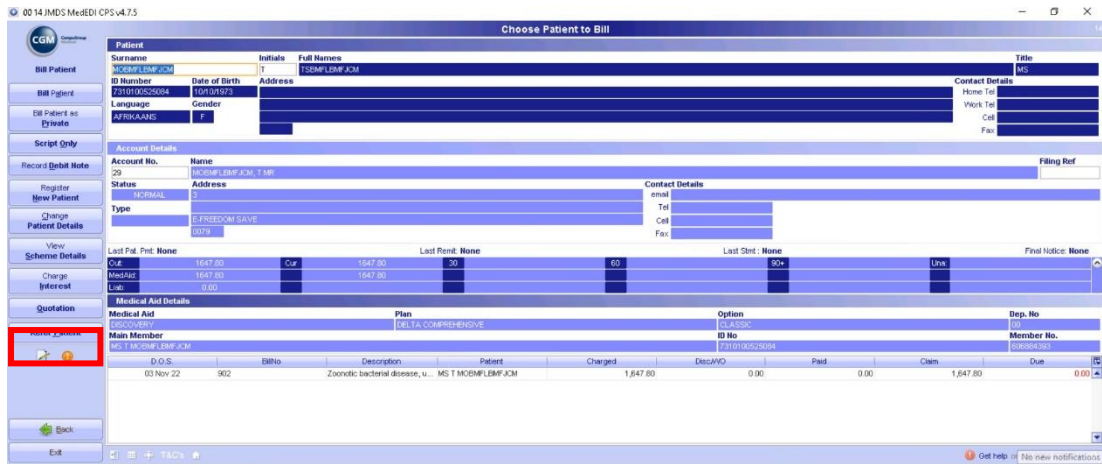
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Get help or call 0861 833 334

# 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.



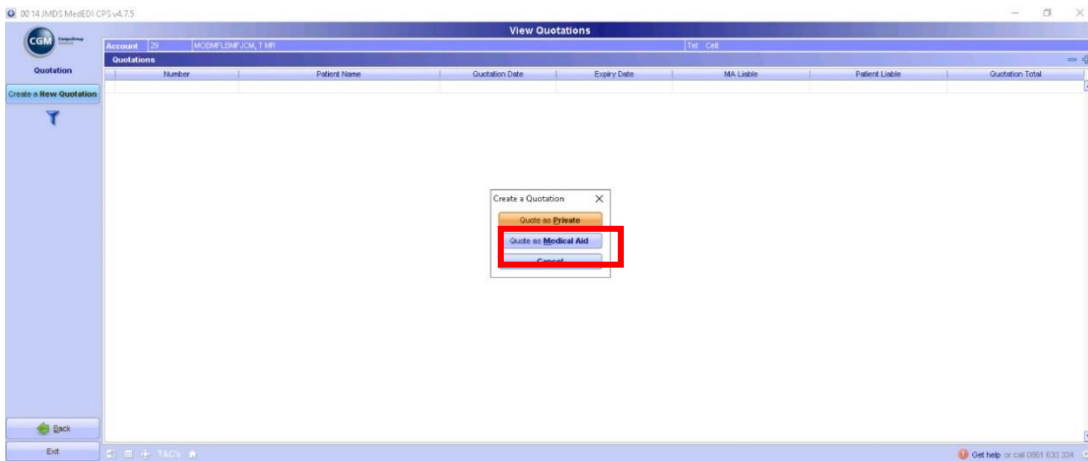
The View Quotations window will open, select, “Create a new quotation”



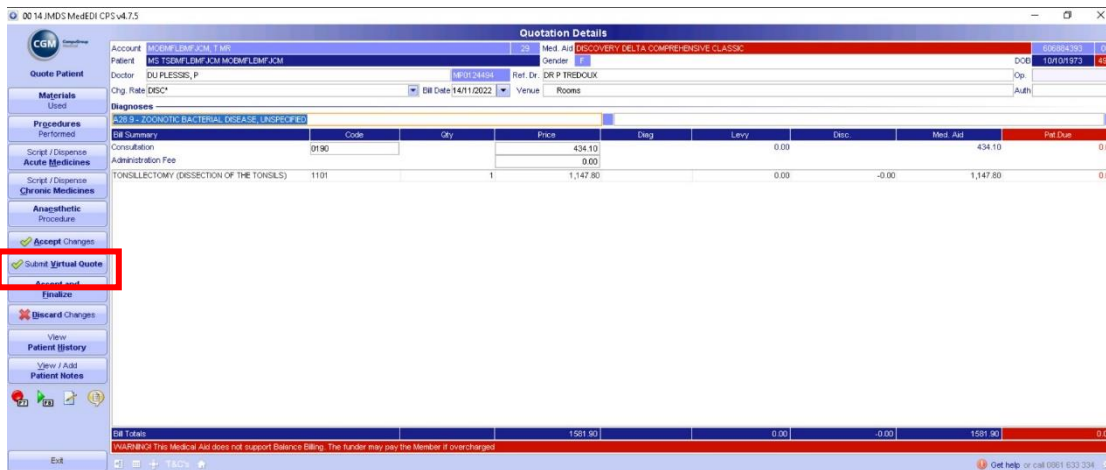
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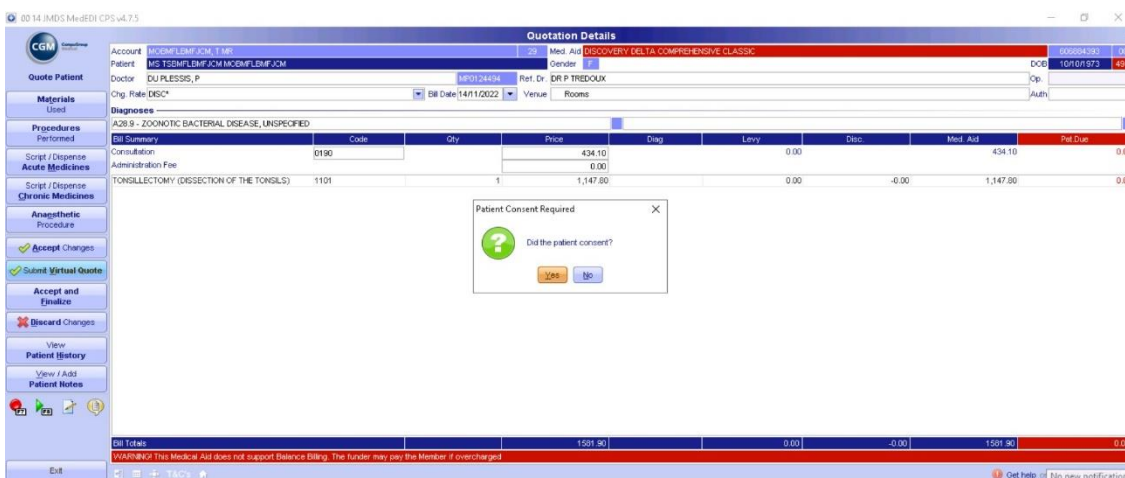
The Create a Quotation pop-up will open, select, "Quote as Medical Aid"



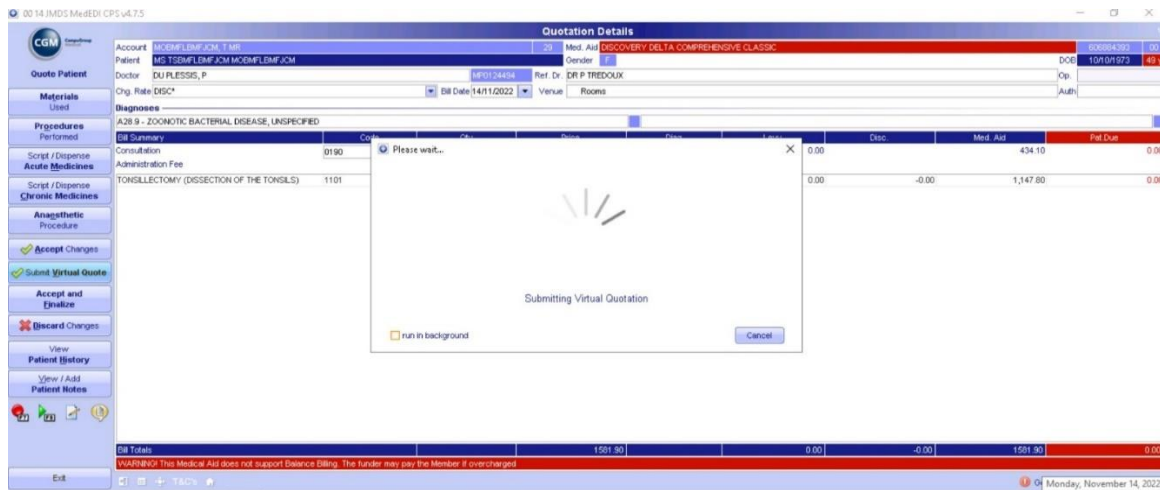
You can now go ahead and populate the quotation screen with the necessary details for the patient to create the quote e.g Medical Aid, Diagnosis, Consultation codes etc. Once you have completed all the details, click "Submit virtual quote" in the left menu.



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"



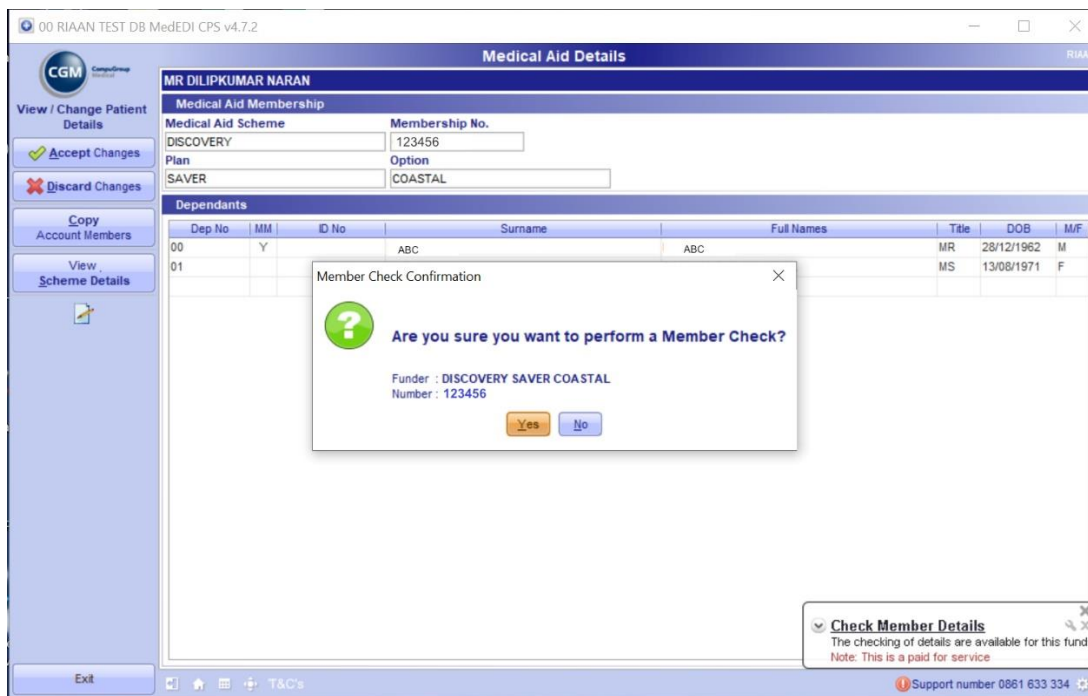
The quotation request is sent to the medical aid and you will receive a real-time response to confirm whether the quote has been approved.



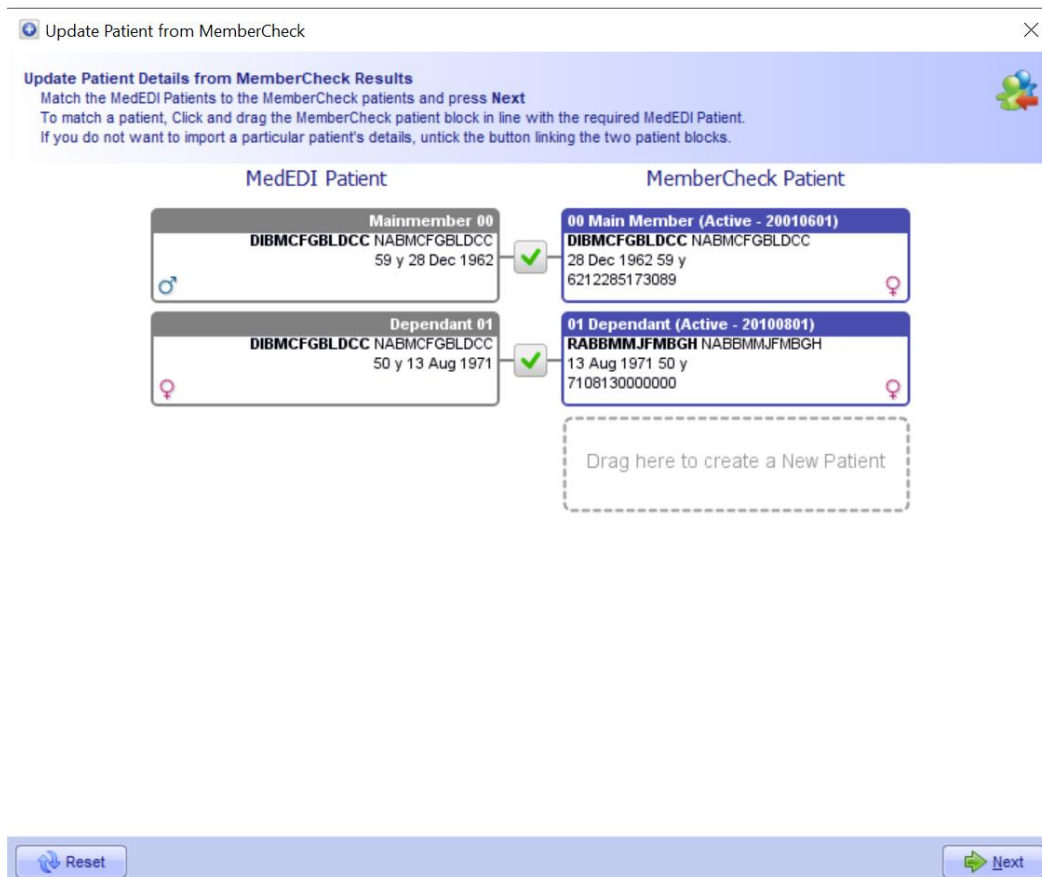


# Member Check

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.



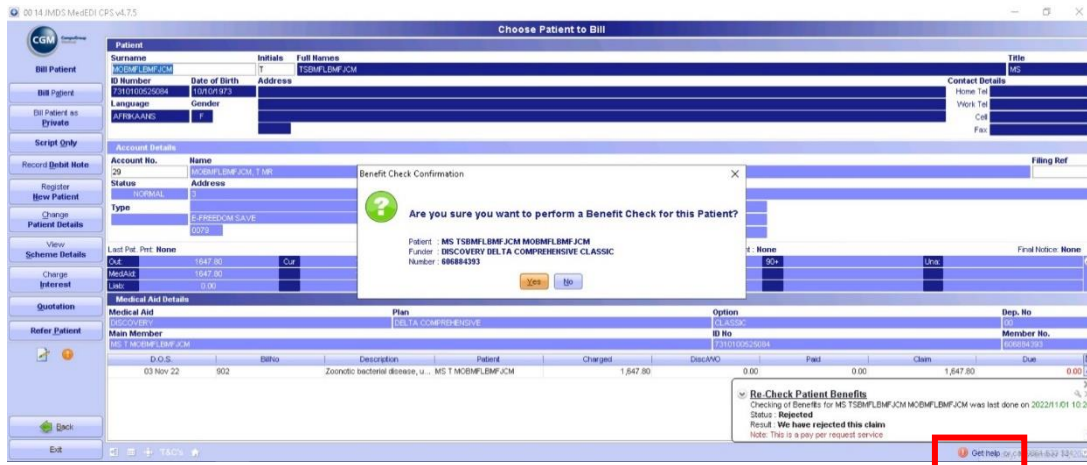
Once you have the Member Check Details, another screen will pop up which will display the member details. You can then select to import the member and their dependants from the scheme.



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

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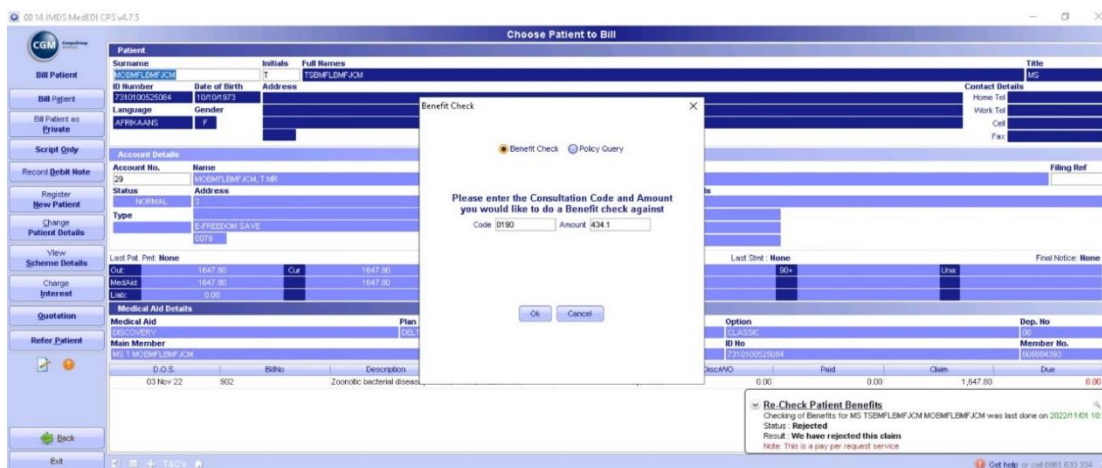
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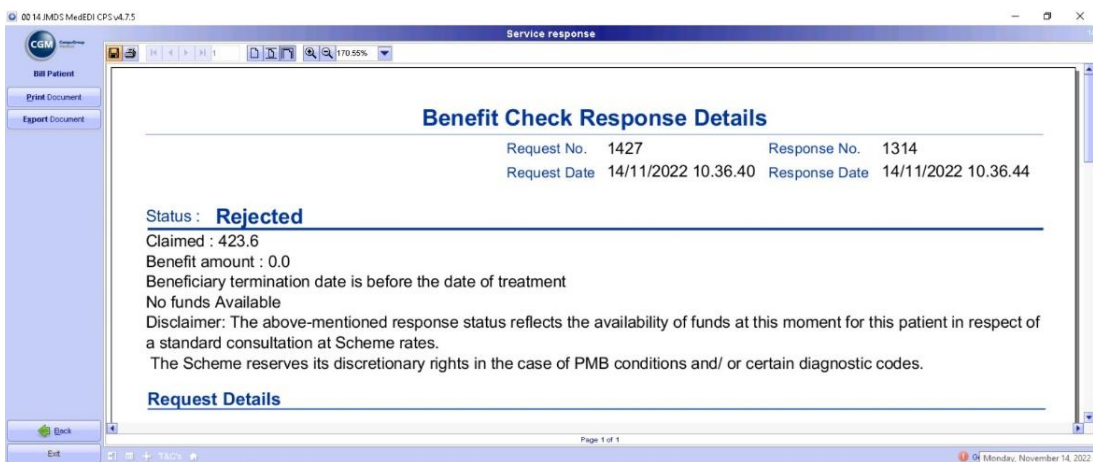
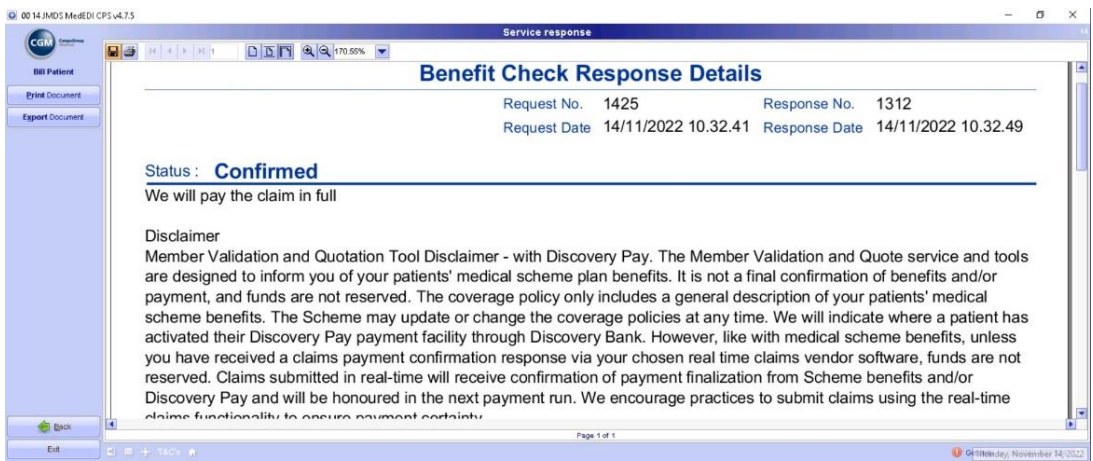
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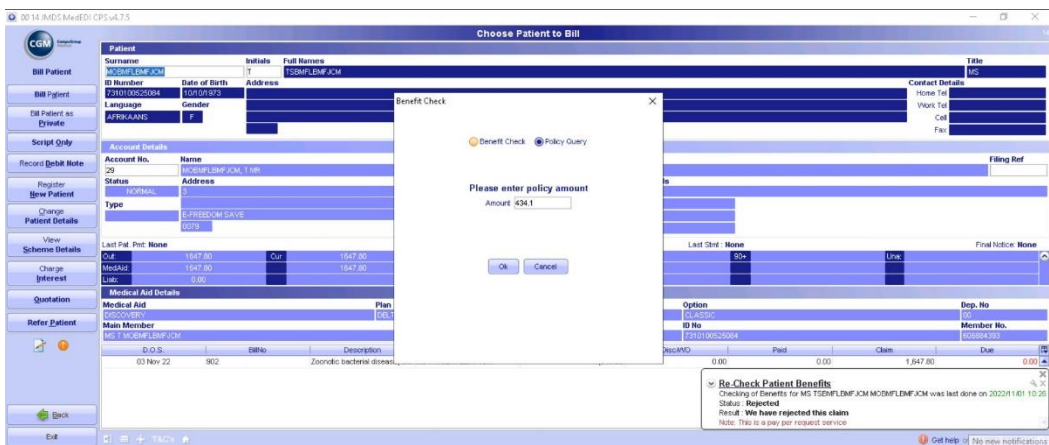
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0014 JMD5 MedEDI CPS v4.7.5

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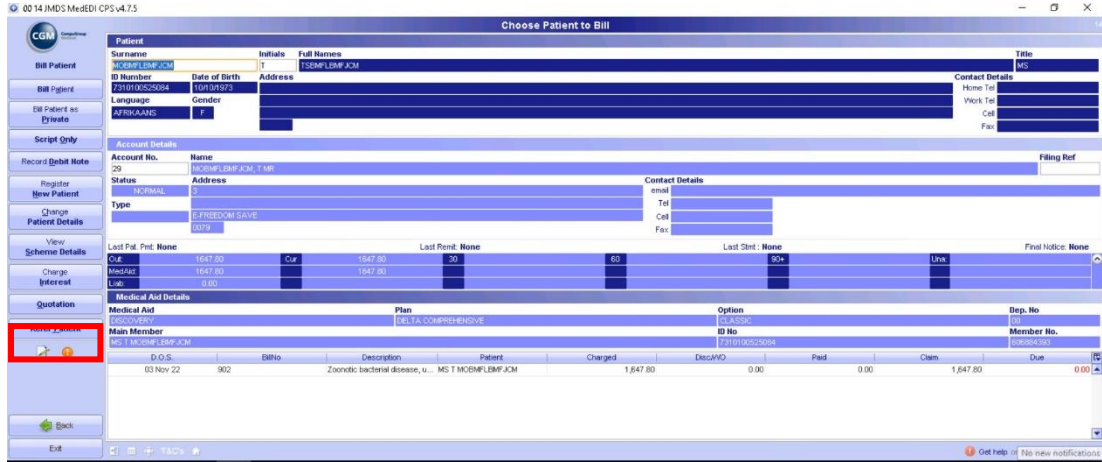
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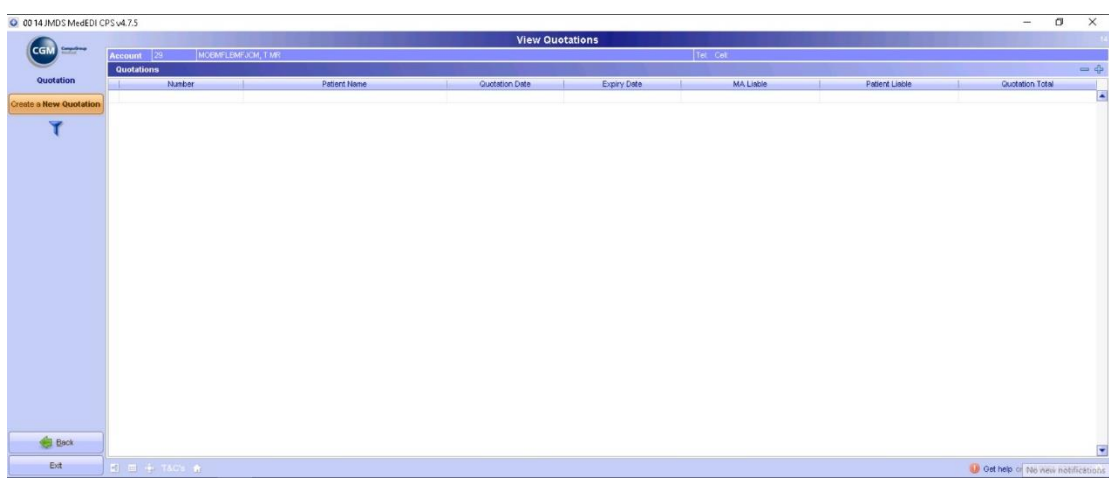
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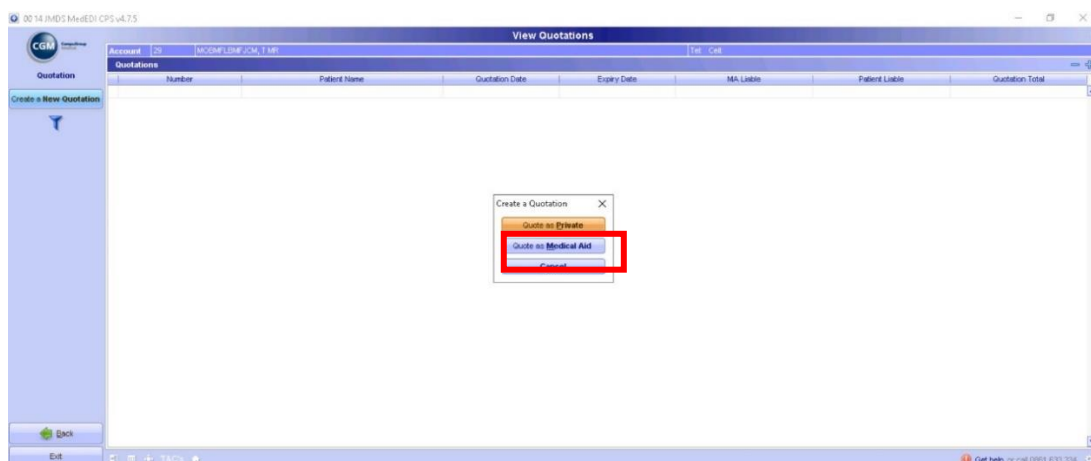
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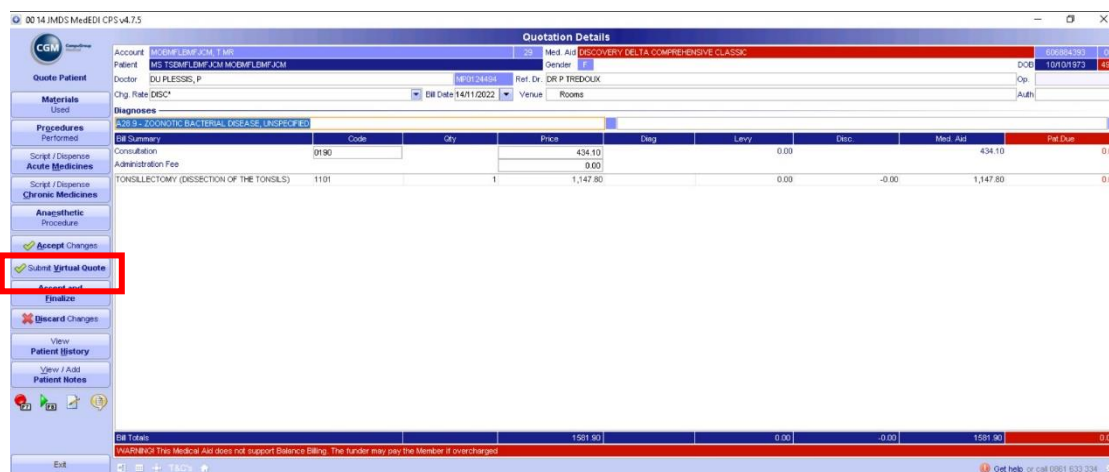
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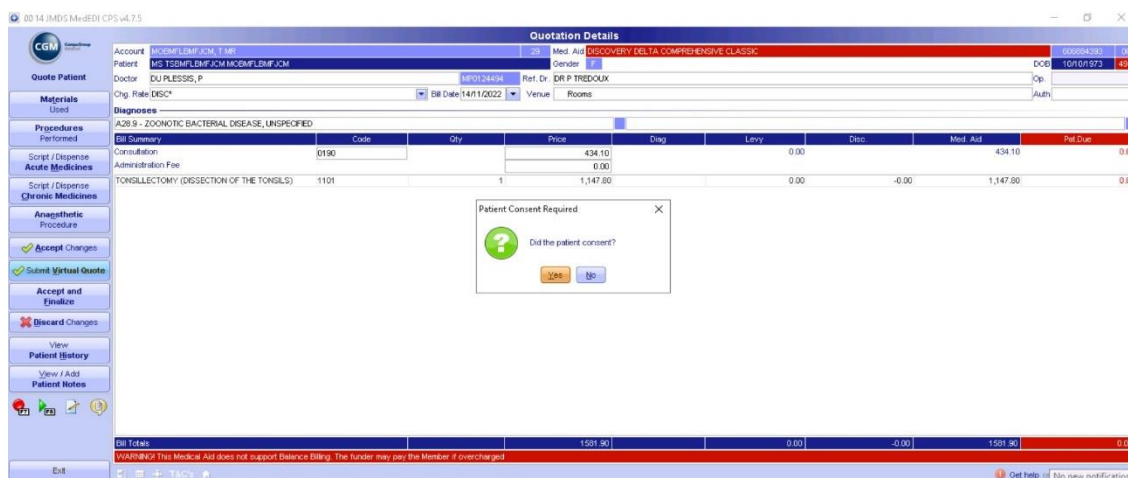
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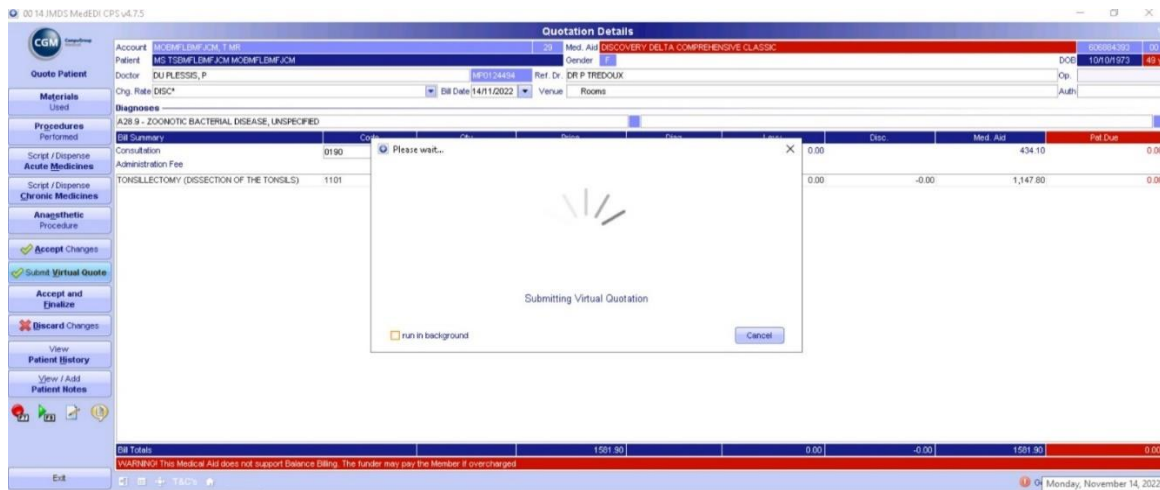
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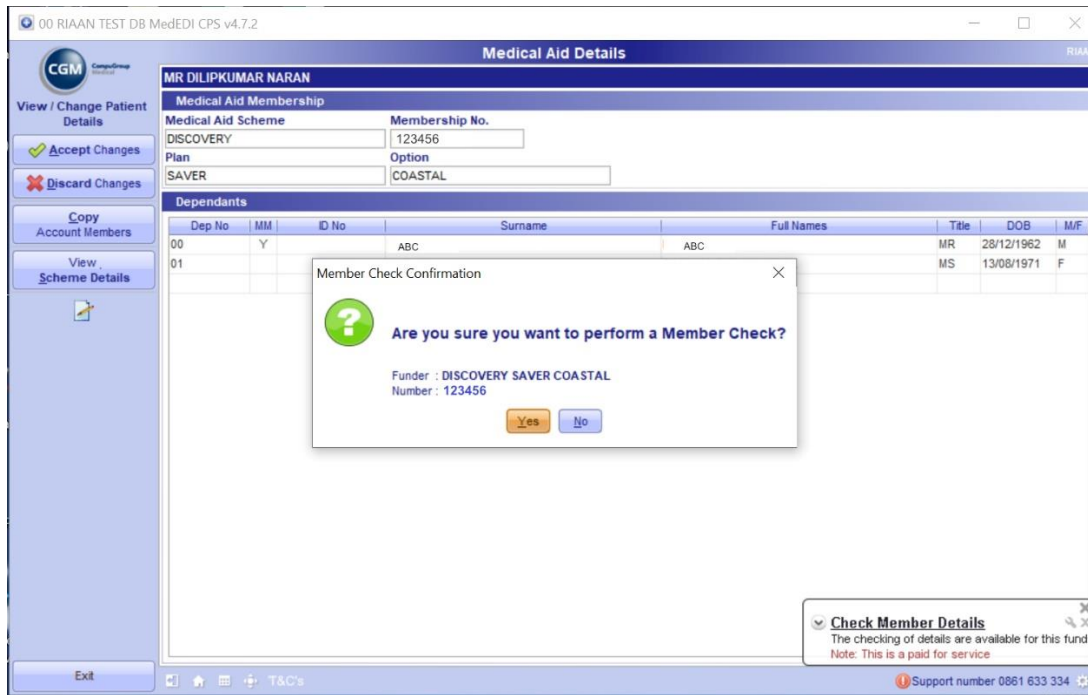


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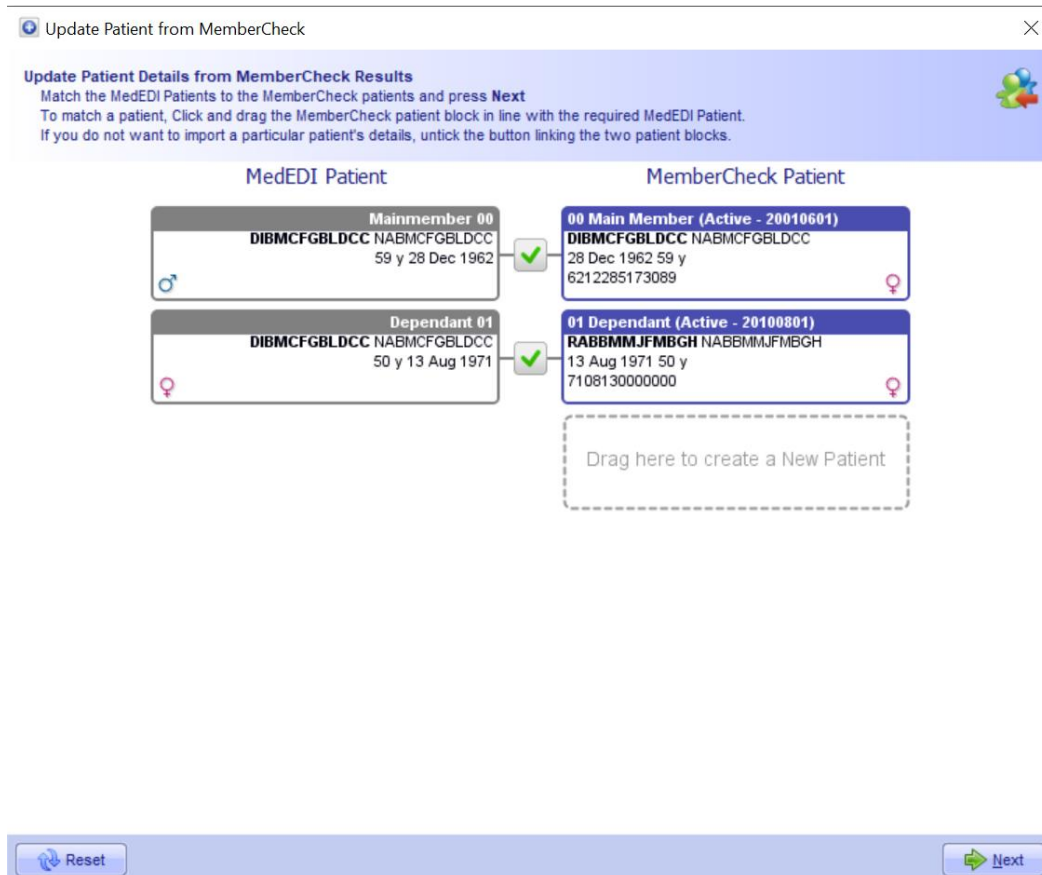


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**CGM MEDEDI** - Your partners in Medical Billing.

South Africa's favourite billing and practice management platform. Streamlining administrative and billing processes for over 20 years.

**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](mailto:help.za@cgm.com) to chat to one of our friendly Customer Support agents.