

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.

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.

00 RIAAN TEST DB MedEDI CPS v4.7.2

Medical Aid Details

MR DILIPKUMAR NARAN

Medical Aid Membership

Medical Aid Scheme	Membership No.
DISCOVERY	123456
Plan	Option
SAVER	COASTAL

Dependants

Dep No	MM	ID No	Surname	Full Names	Title	DOB	M/F
00	Y		ABC	ABC	MR	28/12/1962	M
01					MS	13/08/1971	F

Member Check Confirmation

Are you sure you want to perform a Member Check?

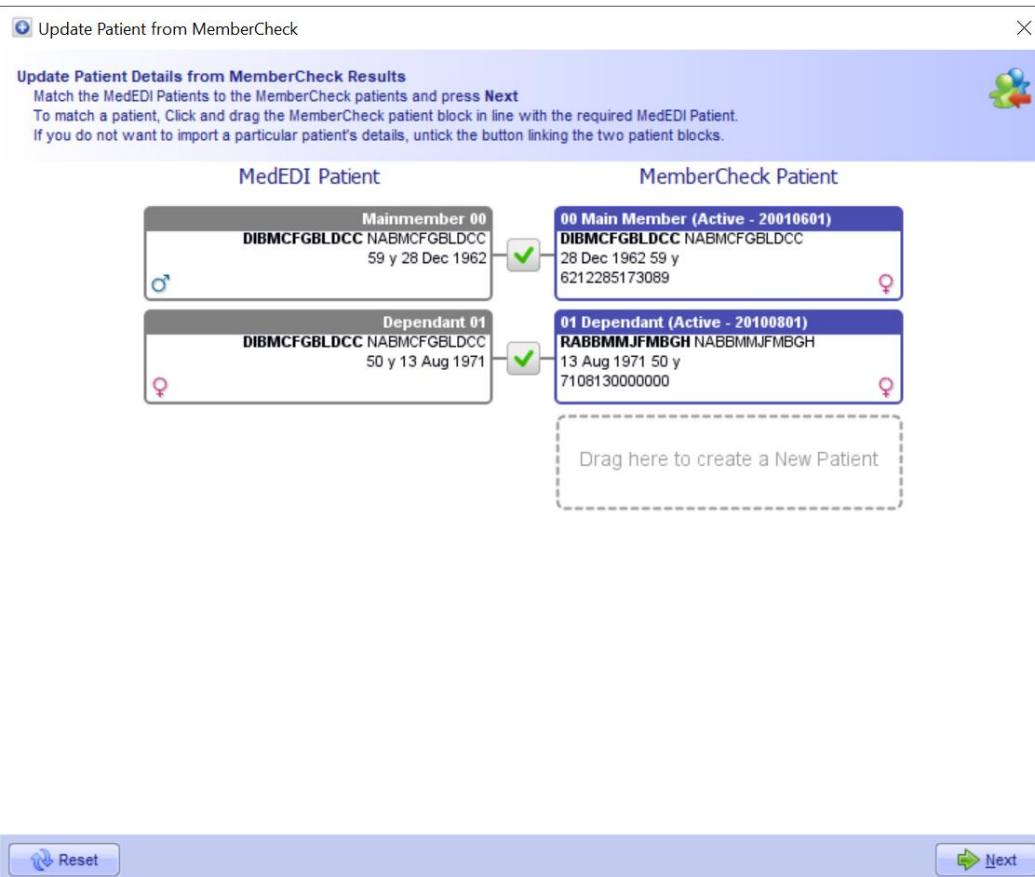
Funder : DISCOVERY SAVER COASTAL
Number : 123456

Yes No

Check Member Details
The checking of details are available for this fund.
Note: This is a paid for service

Support number 0861 633 334

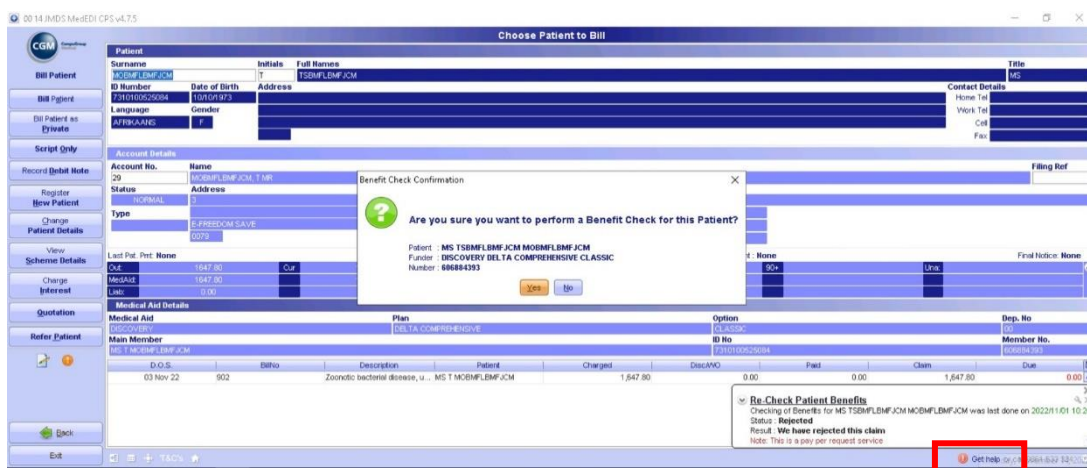
Once you have the Member Check Details, another screen will pop up which will display the member details. You can then select to import the member and their dependants from the scheme.



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.

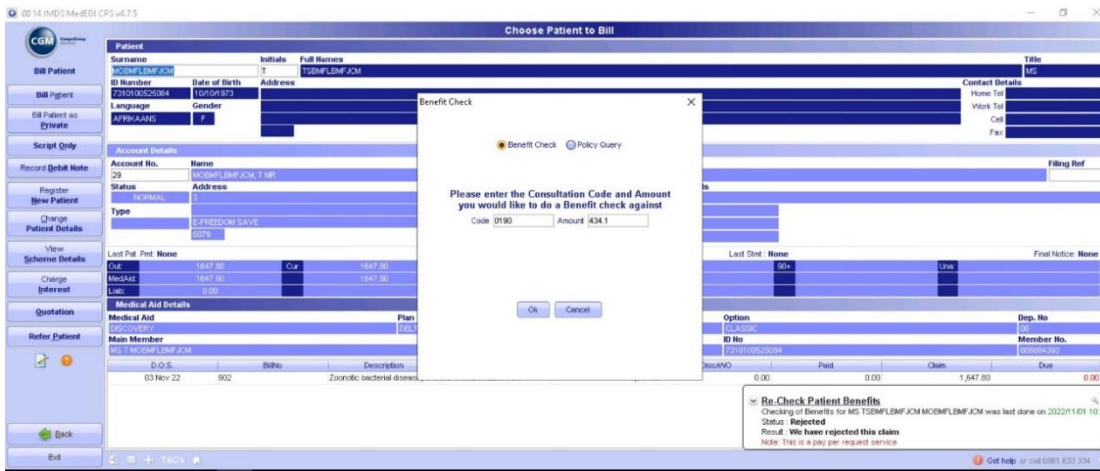
You will see a pop-up asking whether you are sure you would like to perform a benefit check, click "yes".



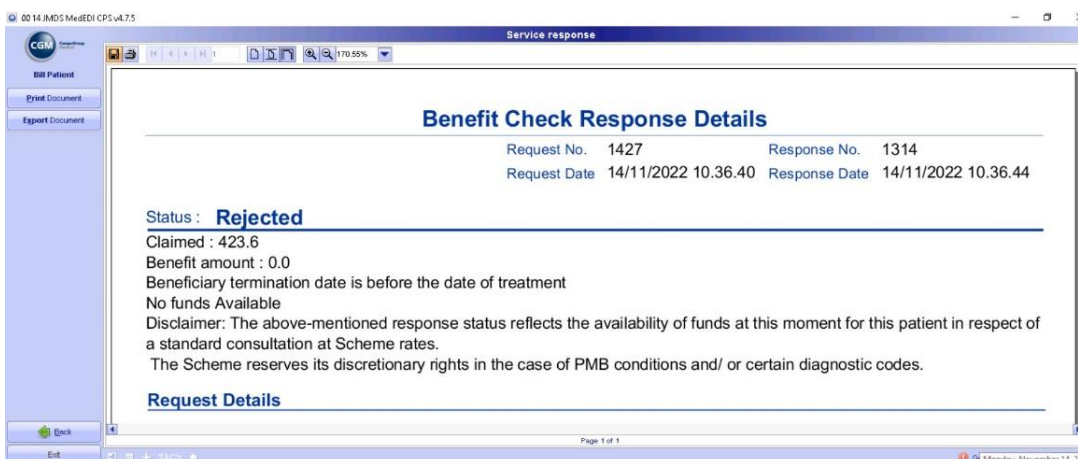
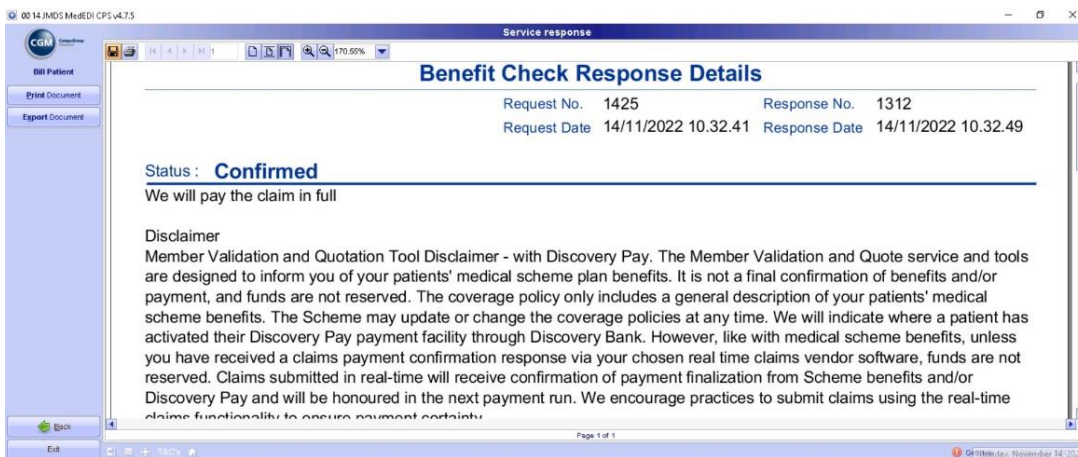
Performing a Benefit Check:

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.



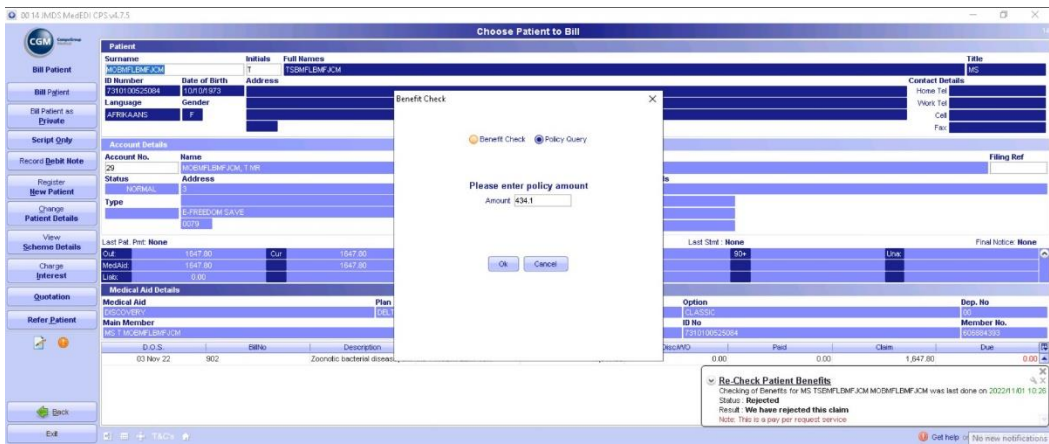
The benefit check is real-time, you will receive a *Benefit Check Response* from Discovery, Medscheme or MHG in a few seconds. If the benefit check is **confirmed**, the medical aid will cover the claim, if it is **rejected** the medical aid will not cover the claim and you will need to bill the patient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



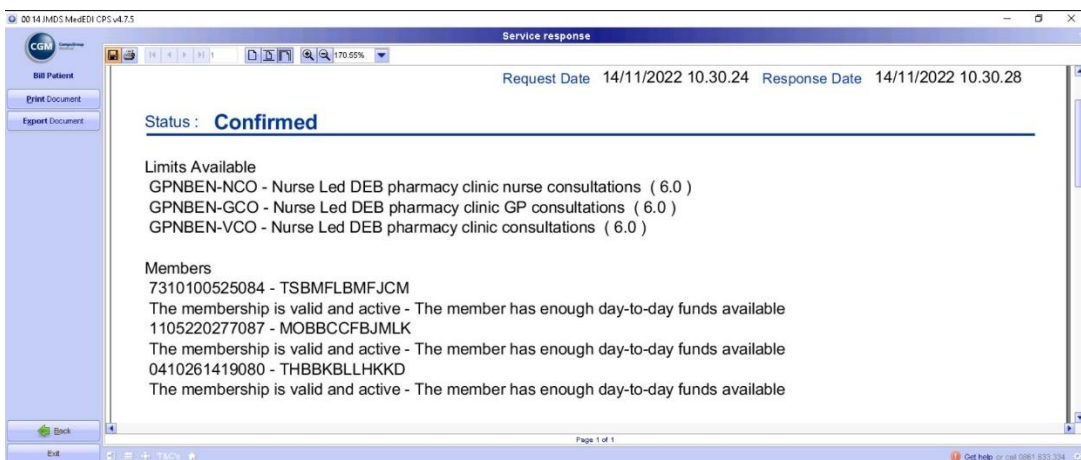
Performing a Policy query for Discovery members only:

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

D.O.S.	BNNo	Description	Patient	Charged	DiscrWO	Paid	Chm	Due
03 Nov 22	902	Zoonotic bacterial disease, u...	MS T MCOBPLMFJCM	1,647.80	0.00	0.00	1,647.80	0.00

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

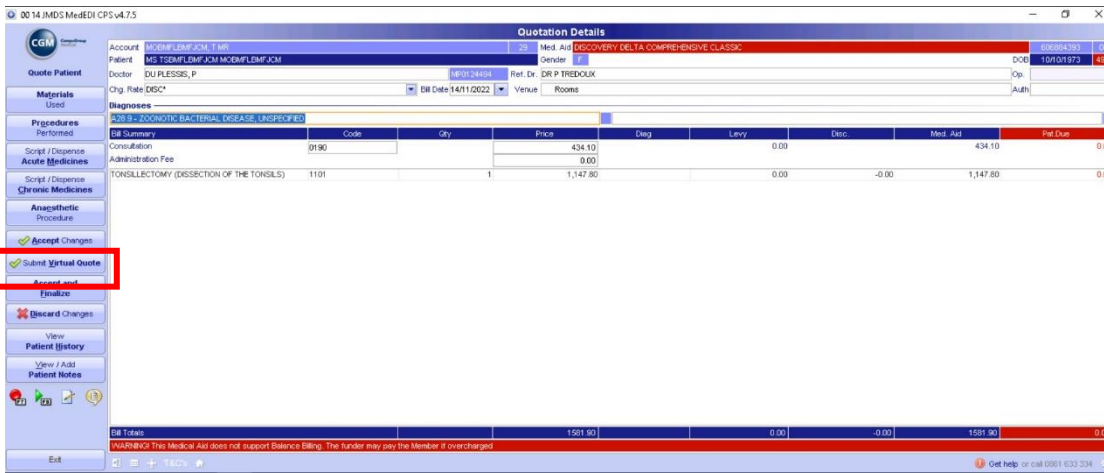
The screenshot shows the 'View Quotations' window. The left-hand menu has a 'Create a New Quotation' button highlighted with a red box. The main area displays a table of quotations.

Quotations	Number	Patient Name	Quotation Date	Expiry Date	MA Liab	Patient Liab	Quotation Total
------------	--------	--------------	----------------	-------------	---------	--------------	-----------------

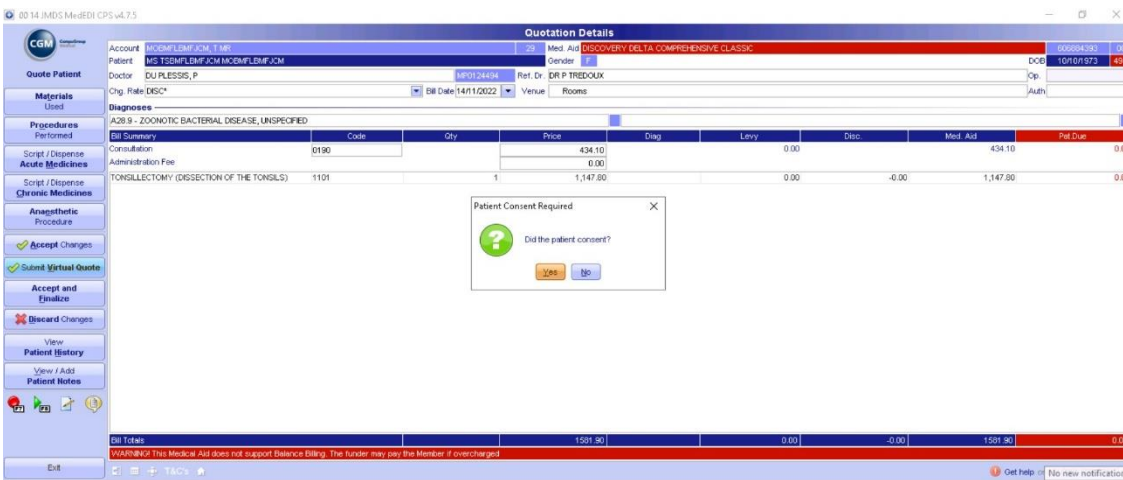
The Create a Quotation pop-up will open, select, “Quote as Medical Aid”

The screenshot shows the 'View Quotations' window with a 'Create a Quotation' pop-up window open. The pop-up window has two options: 'Quote as Private' and 'Quote as Medical Aid'. The 'Quote as Medical Aid' option is highlighted with a red box.

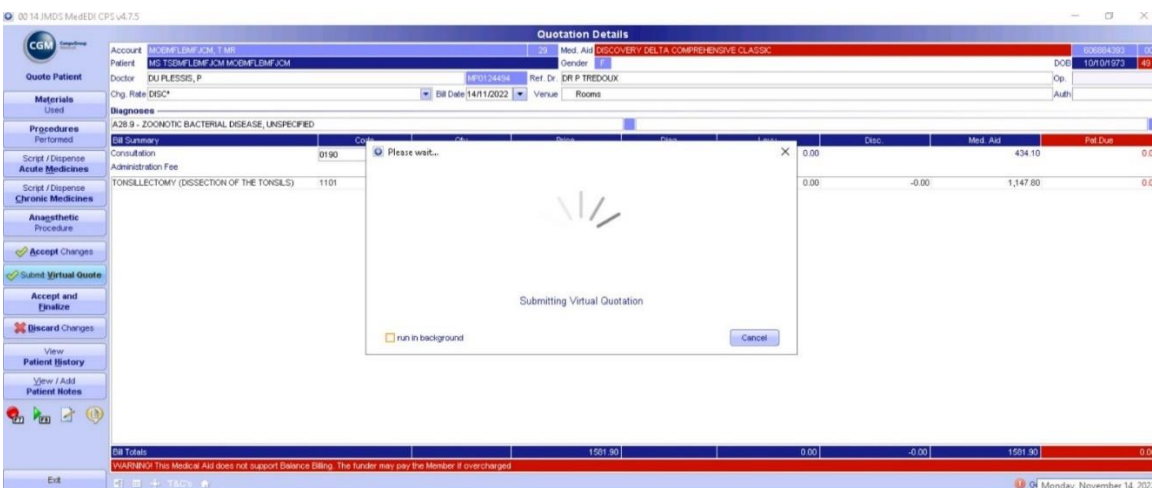
You can now go ahead and populate the quotation screen with the necessary details for the patient to create the quote e.g Medical Aid, Diagnosis, Consultation codes etc. Once you have completed all the details, click “Submit virtual quote” in the left menu.



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.



0014 JMDS MedEDI CPS v4.7.5

Claim Response Details

0079

Dep No. 02
 Dep Nr. 0410261419080

Current Claim Status: Confirmation Response Received

Huidige Status Van Eis: Funder Ref: Fonds Verw

Date of Claim: 14/11/2022 Service Date: 14/11/2022 Bill No.: -9223372 Switch Ref:

Eis Datum: Diens Datum: Eis Nr. Switch Verw

Bill Total Amt	434.10	Initial Amt Expected	434.10	Current Benefit Amt	434.10
Totale Eis		Bedrag Verwag		Huidige Voordele bedrag	

Authorisation No. Magtigings Nr.

Response received at: 14/11/2022 10:44:39

Verslag Ontvang Op

General

We will pay the claim in full

Disclaimer

Member Validation and Quotation Tool Disclaimer - with Discovery Pay. The Member Validation and Quote service and tools are designed to inform you of your patients' medical scheme and benefits. It is not a final confirmation of benefits and/or payment, and funds are not received. The coverage

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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 to chat to one of our friendly Customer Support agents.