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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.

1. 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

2. 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"

📃 🔻 Recordii	ng Demonstration M	lain Member > Al		Accounti	ng statemen	t: 7,	415.14			Full pa	yments of a plan
🕈 Debits 🛛 🕹 Credits					Due dates:			Accounting	notes		
Treatments performed: 8,877.82 Paid documents:		1,462.68	Past Due dates:		s:	0.00					
Service and products: 0,00		Adv. payments to invoice: 0.00			Treatments in progress: 0.00						
				Treatmen	its to perform	n:	905.56				
Total Debit: 8,877.82		Total Credit: 1,462.68		Total:		l: 8,	8,320.70				
	3	/ @ + -	1								Available in Xin
Date: 10/05/2022	Claim Submissions and Patient: Recording Den	Remittance Demo	per of ZAR 257.79								
Tooth Code	Treatment		A Practitioner	Status	Price List	Amount	T.P. 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 Roor
8101	Oral examination		COSMETIC & DENTA	10/05/202	158.91	158.91	0.00	0.00	0.00	Z00.0	Consulting Room
8110	Sterilized Instrumentatio	on	COSMETIC & DENTA	10/05/202	36.85	35.85	0.00	0.00	0.00		Consulting Roo
Num. Date	Amount Paid	Num.	Date Status	Amou	nt Re V S	evense etails tatus	Date	Amount	A H	Date	
Date: 06/04/2022	Treatment plan from ph Patient: Recording Den	nysical examination nonstration Main Memb	per of ZAR 3,399.31								č
Date: 15/03/2022	Demo of 2x vists treatemnts Patient: Recording Demonstration Main Member of ZAR 589.28									Č	
Date: 15/03/2022	Treatment plan from physical examination Patient: Recording Demonstration Main Member of ZAR 503.01										č
Date: 11/03/2022	New treatment plan Patient: Recording Den	nonstration Main Memb	per of ZAR 500.00								ć
	-										20

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3. 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										
💷 🔻 Recordii	ng Demonstration I	Main Member > A	III.	Accounting statem	ent: 7,4	115.14			Full p	ayments of a plan
Debits		Due dates: 0.00			Accounting notes					
Treatments performe	ed: 8,877.82	Paid documents:	1,462.68	Past Due da	tes:	0.00				
Service and products		Adv. payments to i	nvoice: 0.00	Treatments in progr	ess:	0.00				
				Treatments to perfo	om: 9	905.56	-			
Total Debit:	8,877.82	Total Credit:	1,462.68	To	tal: 8,	320.70				
• • • • •	3	/ @ + -								🗹 Available in Xinf
Date: 10/05/2022	Claim Submissions an Patient: Recording De	d Remittance Demo monstration Main Mem	ber of ZAR 257.79							(j)
Tooth Code	Treatment		Practitioner	Status Price List	Amount	T.P. quota	Adv. paym.	Invoices	Diag. Code	Place of services
Documents Num. Date	Amount Paid	Claims Num,	Date Status	Amount	Resubmit, Reverse Details Status	Deposits t Date	o be invoiced Amount	↑ + - Reset:	Payment Date	due dates Amount
Date: 06/04/2022	Treatment plan from p Patient: Recording De	ohysical examination monstration Main Mem	ber of ZAR 3,399.31							۵۵ ا
Date: 15/03/2022	Demo of 2x vists treat Patient: Recording De	temnts monstration Main Mem	ber of ZAR 589.28							(J
Date: 15/03/2022	Treatment plan from p Patient: Recording De	ohysical examination monstration Main Mem	ber of ZAR 503.01							(1
Date: 11/03/2022	New treatment plan Patient: Recording De	monstration Main Mem	ber of ZAR 500.00							٤٥ ٤
Date: 01/06/2021	Crown.implant		2					-	41-	23
Acc. Statement	Print Full Paym.	Inv. Submit Claim			Treatme	nt plans	Other	documents		Cancel Confirm

4. 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.

👥 🔻 Recording Demonstration Main Member > All						Acc	Accounting statement: 7,415.14			Full payments of a plan				
🕈 Debits 🛛 🕹 Credits						Due dates:			Accounting	notes				
Treatments performed: 8,877.82		Pa	Paid documents: 1,462.68		8	Past Due dates:		0.00						
Service and products: 0.00			Adv. payments to invoice: 0.00			0 Treat	Treatments in progress: 0.00							
						Trea	tments to perfe	om:	905.56					
Total Deb	pit:	8,877.82	To	tal Credit:	1,462.6	8	Тс	tal: 🚺 🗧	3,320.70					
•		3		₽ + -									Available in Xin	
Date: 1	10/05/2022	Claim Submissions	and Rem	ittance Demo	her of 748 257 7	9							C2	
Tooth	Code	Treatment	e cirione c		Practitioner	Status	Price List	Amount	T.P. quota	Adv. paym.	Invoices	Diag. Code	Place of services	
		Local anaesthetic -	per visit		COSMETIC 8									
Num.	Date	Amount Paid		Num.	Date St.	atus A	mount	Reverse Details Status	Date	Amount	+ Reset	Date	Amount	
Date: (06/04/2022	Treatment plan from Patient: Recording	n physica Demonst	I examination ration Main Mem	ber of ZAR 3,399	.31							či	
Date: 1	15/03/2022	Demo of 2x vists treatemnts Patient: Recording Demonstration Main Member of ZAR 589.28									21			
Date: 1	15/03/2022	Treatment plan from Patient: Recording	Treatment plan from physical examination Patient: Recording Demonstration Main Member of ZAR 503.01									či		
Date: 1	11/03/2022	New treatment plan	Demonst	ration Main Man	har of 748 500 0	0							Č	
		Facient, Recording	Demonst	auon mann menn	DEI 01 2 AR 500.0	0								

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