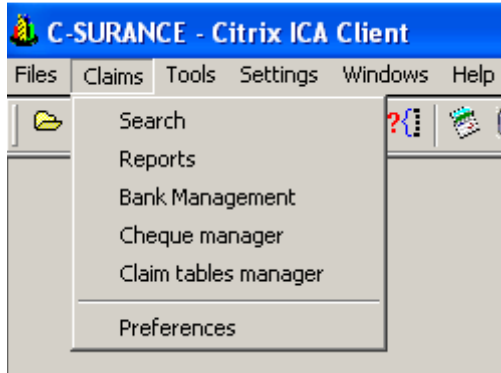


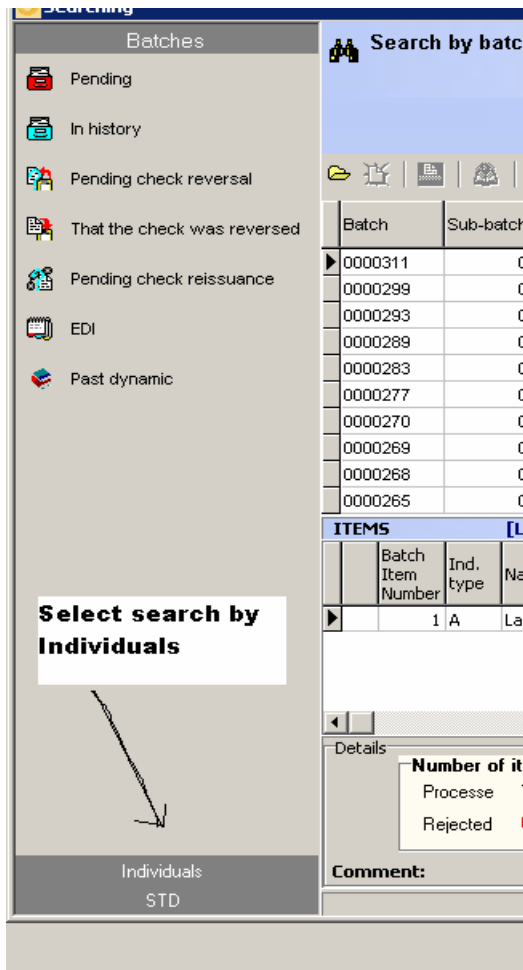
Quick overview of claim creation

A. Claim Creation

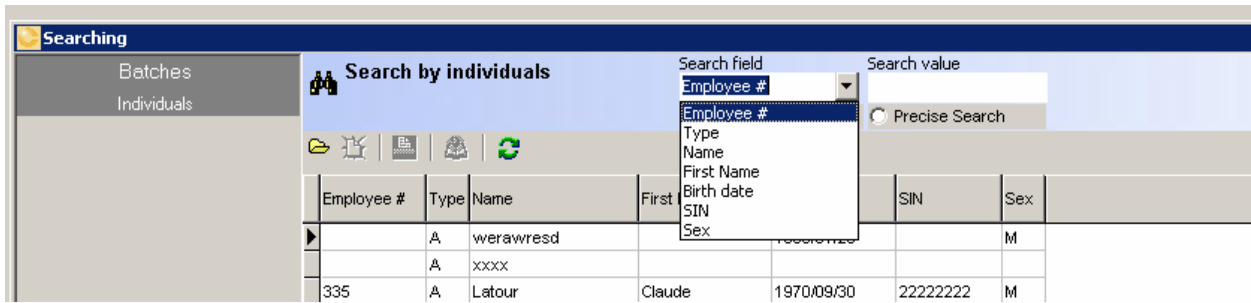
First select the **Search** option from the **Claims** drop down menu



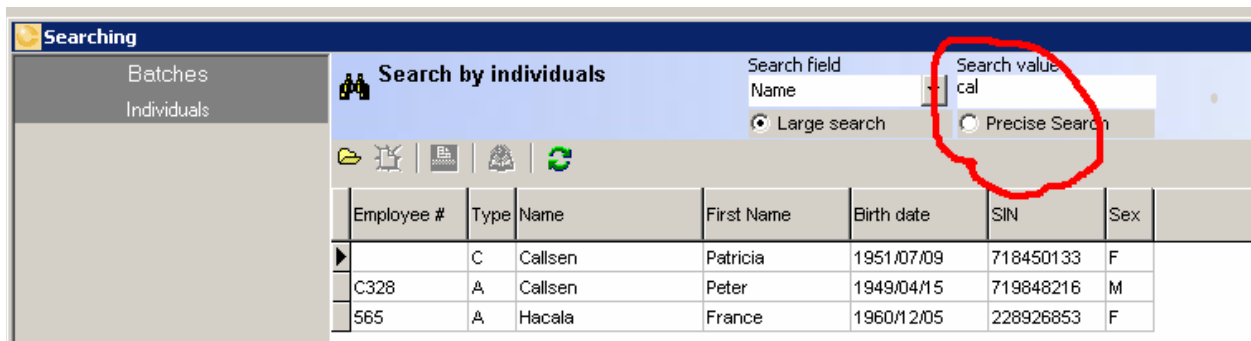
Select search by **Individuals**



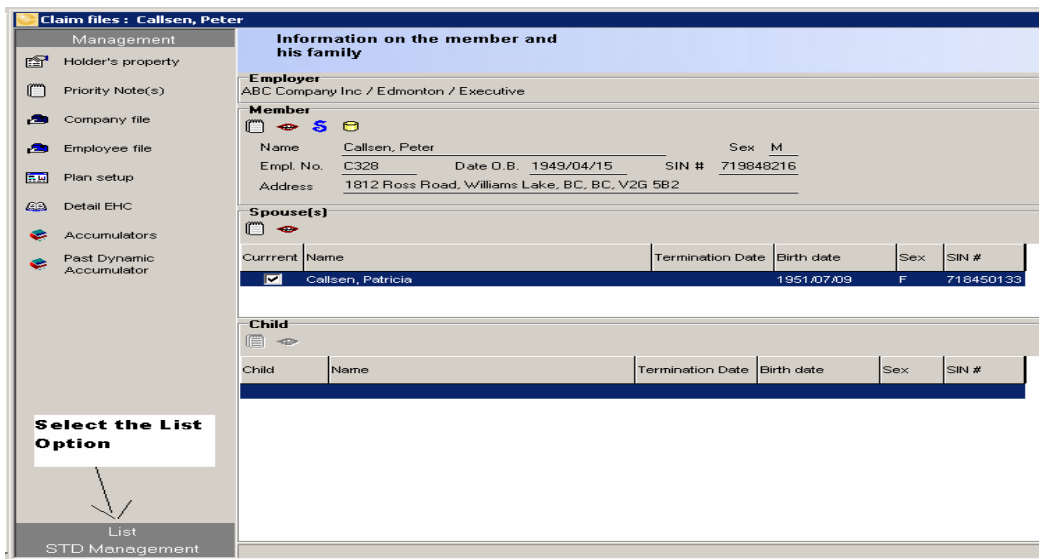
Select the **Search field** that will make it easier for you to identify your claimant:



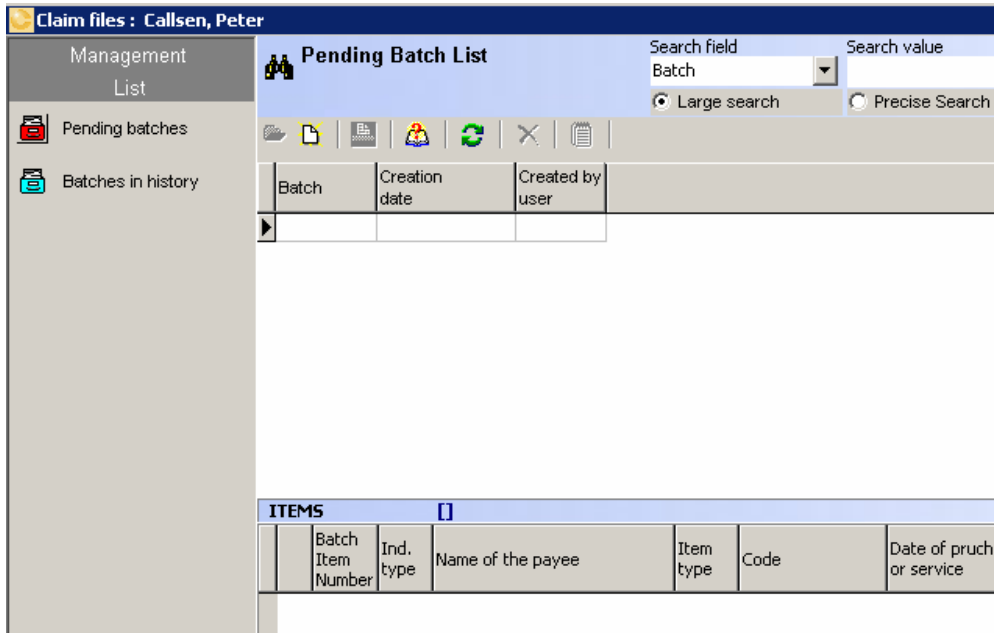
For example, we search by name with CAL included in the name then press Enter:



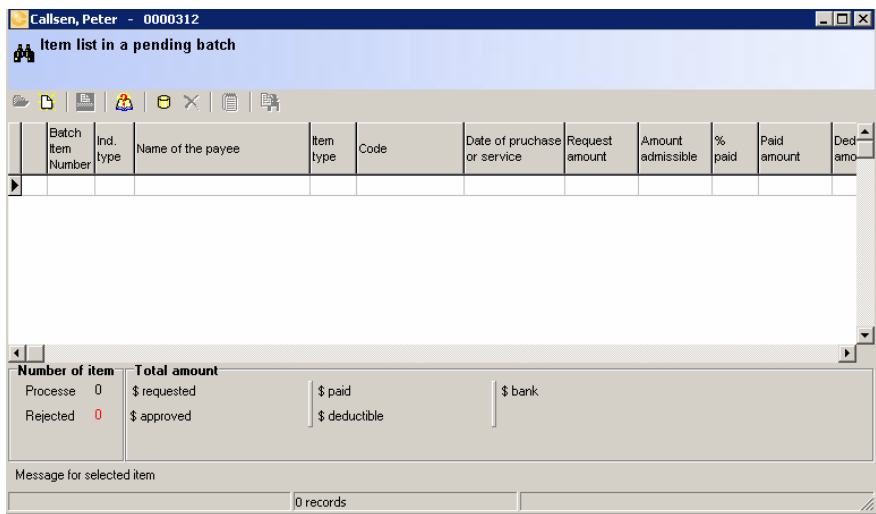
Double click on the proper file or click once and then click on the Yellow folder will give you the general picture of the claimant. You have multiple options available on your left, but since we simply want to create a new claim, we will select the **List** option:



The pending option will automatically be available:



You will choose to create a new Batch by clicking on the  button.



Then do it again to create a serie of claims items by clicking on the  button.

You will now be in a position to create each claim item as needed:

Item manager [Add] Item number 1

Member Name: M Callsen, Peter
 Birth date: 1949/04/15 SIN #: 719848216

Type of family items: Drug
 Payable item: to member to provider

Drug

Purchase date: 2008/02/21 BCO
 D.I.N. number: _____
 Purchase price: \$0.00

Provider Information
 British Columbia drug provider

Yellow file: _____

Comment(s)

D.I.N. Information
 D.I.N. number: _____ Drug name: _____ Codes: _____ RAMQ
 Description: _____

Amount accepted	\$0.00	Paramètres de couverture du contrat		Individual Bank	Status Item 001
Deductible amount	\$0.00	Information du contrat	Individual	Regrouping	
% cov. / % paid	0 /	Deductible	_____	_____	
Amount paid	\$0.00	Maximum of coverage	_____	_____	
Amount coinsurance	\$0.00	Maximum de coassurance	_____	_____	
Comment	_____				

Process Cancel

You will first identify the family member, type of claim, payable item to and if needed the Provider information.

Type of family items: Drug
 Payable item: to member to provider

Provider Information
 British Columbia drug provider


Drug

Purchase date: 2008/02/21 BCO
 D.I.N. number: 00000809
 Purchase price: \$50.00

Then fill the claim information based on the actual bill received from the pharmacist, Health professional, dentist or whatever.

|



When you click  the system will automatically take all the proper adjudication decisions and provide you with the decisions:

D.I.N. Information

D.I.N. number 00000809 Drug name ISOPTO TEARS Codes 52 12 42 RAMQ

Amount accepted \$50.00 Paramètres de couverture du contrat Individual Bank Status Item 004

Deductible amount \$0.00 **Information du contrat** **Individual** **Regrouping**

% cov. / % paid 100 / 100 Deductible \$0.00 \$0.00 Family

Amount paid \$50.00 Maximum of coverage

Amount coinsurance \$0.00 Maximum de coassurance \$0.00 \$750.00 Parental unit

Comment

OK+ OK Cancel

OK+ : Save and add another item for this batch

To continue and create an additional claim item, simply click on the **OK +** and redo the previous steps until you have created all claims items. After accepting the last item, simply click on **Cancel** to exit this option.

Once you have created the last item, the system will bring you back to your **Item list in a pending Batch** where you will find the resume of all the claims items that you will have processed:

Callsen, Peter - 0000312

Item list in a pending batch






Batch Item Number	Ind. type	Name of the payee	Item type	Code	Date of purchase or service	Request amount	Amount admissible	% paid	Paid amount	Ded. amo
1	A	Callsen, Peter	MED	00000809	2008/02/21	\$50.00	\$50.00	100	\$50.00	
2	A	Callsen, Peter	SD	02111	2008/02/21	\$80.00	\$25.60	100	\$25.60	

Number of item	Total amount
Processe 2	\$ requested \$160.00 \$ paid \$75.60 \$ bank \$0.00
Rejected 0	\$ approved \$75.60 \$ deductible \$0.00

Message for selected item

2 records

Again multiple options will be available to you:

- review or edit any item 
- print 
- write a note 
- order payment issuance 
- or exit and save as a pending batch 

If **Saved as a pending batch**, the item will now appear in the employee **Pending batches** section as well as in the general **Pending batches** (this is the first page when entering the **Search** option).

The screenshot shows a software window with a sidebar on the left containing 'Pending batches' and 'Batches in history'. The main area displays a table with the following data:

Batch	Creation date	Created by user
0000312	2008/02/21	105

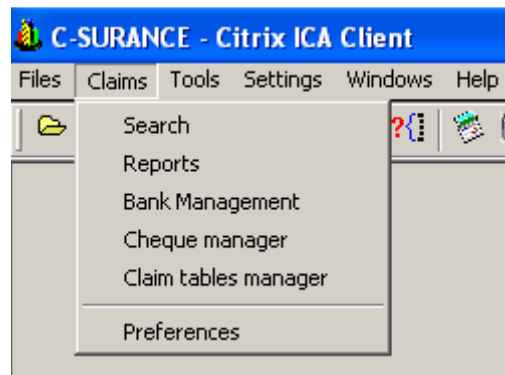
Below this is a section titled 'ITEMS [Calsen, Peter]' with a table containing the following data:

Batch Item Number	Ind. type	Name of the payee	Item type	Code	Date of purchase or service	Request amount	Amount admissible	% paid	Pa ar
1	A	Calsen, Peter	MED	00000809	2008/02/21	\$50.00	\$50.00	100	
2	A	Calsen, Peter	SD	02111	2008/02/21	\$80.00	\$25.60	100	

If you selected to order payment issuance, the transaction will be sent to the **Cheque manager** module. Obviously, you should first create all your claims and then with a single request get cheque issuance for all requested claims.

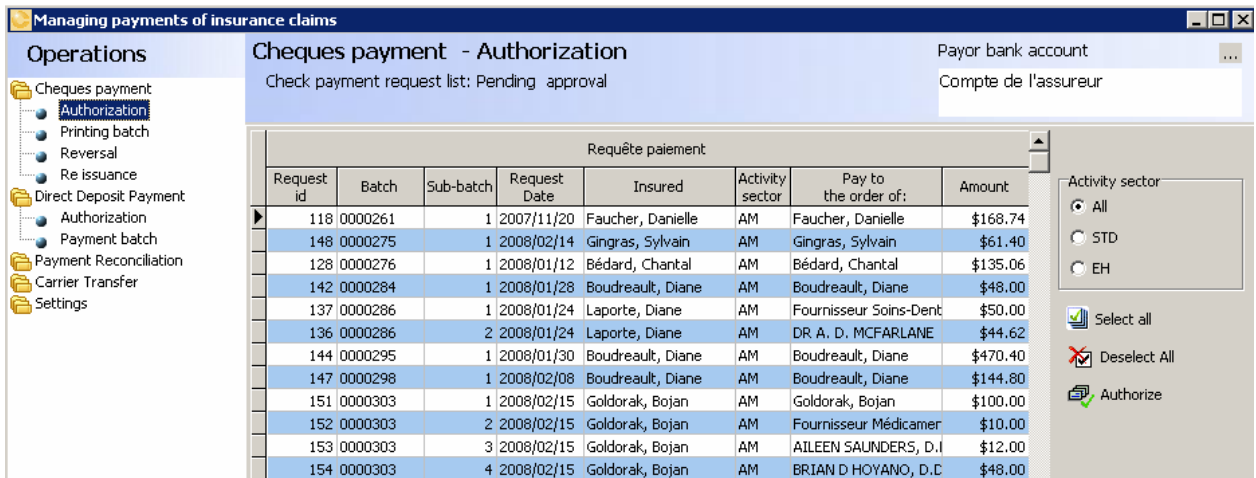
B. Issue payment

To issue payment, access the **Cheque manager** module in your top drop down menu:

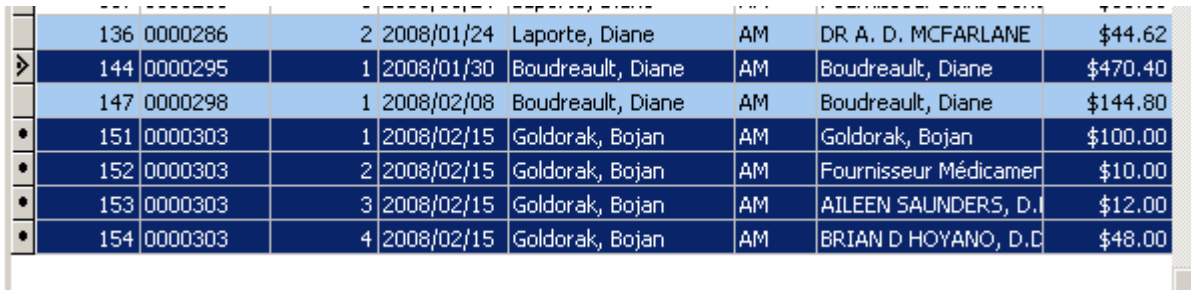


A simplified menu will now be available to you on the left side, where we will:


- first select the **Cheques payment - Authorization** sub-option





- hold the **Ctrl** button and click on the payment that you wish to authorize,



then

- click on the  **Authorize** button.

This simple process will automatically generate all the needed activities except for the actual cheque printout that will be again generated automatically once you have placed your cheques in the printer and requested the  **Printing batch** option.

To print the selected batch, click on the  **Printing cheques** option.

Cheques payment - Printing batch

Payor bank account

Cheques batches to be printed

Compte de l'assureur

Batch id	Description	Notes	Creation date	Items count	Total	Status
0000000002	New batch - cheque paym		2008/02/15	5	\$755.60	Open
0000000003	New batch - cheque paym		2008/02/15	2	\$142.00	Open
0000000005	New batch - cheque paym		2008/02/21	5	\$640.40	Open

Liste des chèques du lot							
Request id	Batch	Sub-batch	Insured	Cheque #	Pay to the order of	Amount	Cancel
154	0000303	4	Goldorak, Bojan		BRIAN D HOYANO, D.D.S.	\$48.00	<input type="checkbox"/>
153	0000303	3	Goldorak, Bojan		AILEEN SAUNDERS, D.D.S.	\$12.00	<input type="checkbox"/>
151	0000303	1	Goldorak, Bojan		Goldorak, Bojan	\$100.00	<input type="checkbox"/>
152	0000303	2	Goldorak, Bojan		Fournisseur Médicaments du	\$10.00	<input type="checkbox"/>
144	0000295	1	Boudreault, Diane		Boudreault, Diane	\$470.40	<input type="checkbox"/>

- Pending batches
- Batches in history
- Notes_description
- Production report
- Printing cheques
- Return as pending
- Synchronization
- Cheque cancellation
- Cheque reprint

Currently you will have a “Preview option” only. Each cheque will appear on the screen only. We will provide you with the print option if needed.

And this is it. The rest of the stuff is for maintenance or special situations that you will be able to explore on your own.

<S:\CORRESPO\CLIEMDI\179\Documentation aide réclamation\Quick overview of claim creation.doc>