

Easy-claim

Web portal operating guide

+

Oranges have long been popular as a rich source of vitamin C that can help ward off colds, assist healing and bolster the immune system.

November 2016



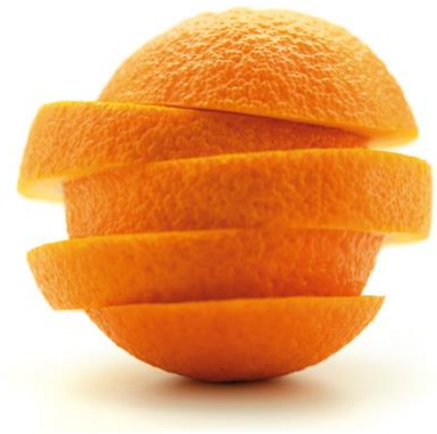
Welcome

to the Easy-claim operating guide

About this guide

This guide explains how to use Southern Cross Health Society's Easy-claim system. It includes step-by-step instructions, FAQs, and a glossary of terms.

The information in this guide does not alter or amend the terms of the Southern Cross Health Society Easy-claim Agreement (Agreement) you have signed. Should there be any inconsistency between the terms of the Agreement and this guide, the Agreement will prevail, to the extent of the inconsistency.



Contact the Easy-claim team

Easy-claim helpdesk: 0800 700 053

Open 8am – 5pm, Monday to Friday (except public holidays). Please note that all calls to and from this number are recorded.

Fax: 07 959 7844

Email: easy-claim@southerncross.co.nz

Claims correspondence: Southern Cross Claims Centre, Private Bag 3216, Waikato Mail Centre, Hamilton 3240

Member Services: 0800 800 181

Member related queries - Open 8am – 6pm, Monday to Friday (except public holidays). Please note that all calls to and from this number are recorded.

Easy-claim system address

<https://easy-claim.southerncross.co.nz>

Contents

Introduction to Easy-claim

- 5 System overview
-

Getting started

- 7 Initial set-up
 - 8 First time administrator tasks
 - 9 Changing passwords
 - 10 Adding, removing or changing staff details
-

Administrator account

- 12 Claim history – Reversing a claim
 - 14 Payment history
 - 16 Edit practitioners
 - 18 Contact us
-

Staff account – Make a claim

- 20 Easy-claim process overview
 - 21 Searching for the member
 - 23 Submitting a claim
 - 25 Perform a benefit check
 - 26 Adding services and treatments
 - 27 Completing the claim
 - 29 Claim outcomes
 - 32 Contact us
-

Easy-claim support

- 33 Common member questions
- 34 Easy-claim system support and questions
- 35 Glossary of terms

Introduction to Easy-claim

What is Southern Cross Health Society Easy-claim (Easy-claim)?

Easy-claim is a Southern Cross system which lets Southern Cross members claim electronically for eligible services and treatments at registered practices. It allows members to claim at the time of treatment without having to complete a claim form.

When a Southern Cross member provides their membership details to a registered practice, an electronic claim can be made via the Easy-claim system. Within seconds the practice can advise the member of the outcome of their claim.

The refund the member would normally receive from Southern Cross is paid directly to the practice, and the member pays any remaining balance.

What are the benefits for my practice?

- More efficient service for patients who are Southern Cross members.
- May improve patient loyalty to your practice because it makes claiming easier.
- If the claim is approved, Southern Cross makes a direct electronic payment to the practice (a 'cash-less' process).
- Positive brand association with Southern Cross.

What are the benefits for Southern Cross members?

- Hassle-free electronic claiming at the point of purchase.
- Members will be able to claim more easily for benefits they may not have claimed for previously (resulting in them getting better value from their Southern Cross policy).

Easy-claim system overview

Browser requirements

In order to use the Easy-claim system, your computer requires a compatible web browser and a broadband internet connection.

Easy-claim is compatible with the following web browsers:

- Internet Explorer v9.x (and above)
- Firefox v4x (and above)
- Safari v6.x (and above)
- Chrome v5x (and above).

Passwords and PINs

Practices will be provided two separate logins, one for an **administrator** and the other for **staff** who will be submitting claims.

Administrator account

Ideally the login details for this account will be held by one person, and if necessary one other as a backup.

The administrator account allows the user to:

- add, remove and change PINs for staff who will be submitting claims
- edit practice staff details
- edit practitioner details
- view claims that have been submitted by the practice
- reverse claims that have been submitted by the practice
- request support
- view payment history
- change passwords

The administrator account will be used the first time the practice logs into the Easy-claim system.

Staff account

This account will be used by all practice staff, primarily for submitting claims. This account can be logged in at the beginning of the day and left open to be used as required. To prevent unauthorised access, staff are required to enter a unique PIN (assigned to them by the chosen staff member with administrator access) when submitting claims.

The staff account allows users to:

- submit claims
- view previously submitted claims
- request support

PINs

The staff account is a generic login designed to be left open during the day. Staff are required to enter a unique PIN when submitting claims. The PIN:

- identifies the person submitting the claim
- prevents unauthorised use of the system
- is used for auditing purposes

Your obligations

Access to the Southern Cross Easy-claim system is provided to authorised users to perform tasks associated with Easy-claim.

Practices must ensure their use of the Easy-claim system is secure as follows.

- Keeping all systems and media containing Southern Cross member data secure, to prevent access by or disclosure to anyone other than authorised personnel.
- Selecting a password and keeping it secure. Passwords should be kept confidential to the people they've been assigned to. Writing down (or storing the password electronically), or sharing it either verbally or in writing is not permitted.
- Passwords should be changed regularly, including when practice staff leave.

Getting around the system

Once you are logged into the Easy-claim system, the easiest way to get around is to use the mouse.

Tabs

There are tabs displayed at the top of every page. These tabs help you to navigate around the different areas of the system.



When logged in to the staff account, a 'home' icon is visible on the claim tab. This icon allows you to return to the member search screen at any time (i.e. to abandon the claiming process), so you are ready for your next patient.

Help text



Next to most fields within the system you will see blue help text icons like the one pictured. Move the mouse pointer over the icon for an explanation of what you need to enter into the field.

'Interactive help' link



For extra help, click on the 'Interactive help' link to access our video training library. You'll find interactive help for each section of the system.

You will need Adobe Flash to view the video training library. If your browser doesn't have Flash, you'll be prompted to download it. If you're unable to view the video training library, this operating guide contains the same information.

Staff @ Training Practice Logout

Southern Cross Health Society Easy-claim

[Claim](#) [Claim history](#) [Contact us](#)

Member search

Search using: ☒ Member card number

6101

☐ Name and date of birth

☐ Membership number

Service date: 02 Jul 2014

[Search](#) [Reset search](#)

[Interactive help](#)

Easy-claim helpdesk: phone 0800 700 053 or email easy-claim@southerncross.co.nz

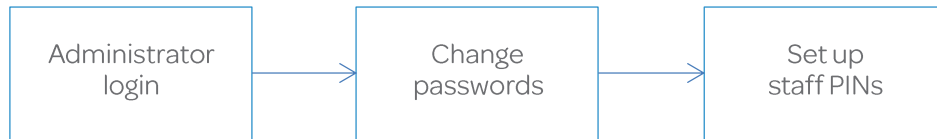
© 2014 Southern Cross Medical Care Society. All rights reserved.

'Interactive help' link **Tabs**

Getting started

Initial set-up

Before your practice can submit claims via the Easy-claim system, the administrator will need to complete the following.



First-time administrator login

To login go to <https://easy-claim.southerncross.co.nz>, type the **administrator** username and password as given to you during training, and click 'Login'.

Login

Username

Admin.Practice

Password

.....

Login

Login screen



Can I create a shortcut to access Easy-claim?

Yes. While on the login page, press Ctrl+D on your keyboard to add Easy-claim to your Favourites/Bookmarks. You can also place an Easy-claim icon on your desktop by right clicking on your desktop, then selecting 'Create shortcut'. Type the Easy-claim web address into the location field and follow the prompts.

Passwords

For your first time logging in, you'll be prompted to change both the administrator and staff account passwords to something that only you and your practice staff know.

Passwords must have between 8 – 32 characters, including at least two letters and two other characters (numbers 0-9 or punctuation).

1. Enter the temporary password provided by Southern Cross.
2. Enter and re-enter the new administrator password into both fields provided.
3. Enter and re-enter the new staff password into both fields provided.
4. Click 'Save and login'.

Change your password

As this is your first time logging into the Easy claim portal, please change the password on both the Administrator Account and the Staff Account.

Tip: Passwords must have at least 8 characters, including at least two letters and two other characters (numbers 0-9 or punctuation).

Your temporary password

Administrator Account

New password

Re-enter new password

Staff Account

This is the password all staff will use to access the Easy claim portal.

New password

Re-enter new password

Save and loginCancel

First-time password change



Can I use the passwords assigned by Southern Cross without having to change them?

No. The initial administrator and staff passwords that are provided to you by Southern Cross can be used for the first-time login only.

Changing passwords

It is good practice to change passwords regularly to maintain the integrity of the Easy-claim system. **Passwords must have between 8 – 32 characters, including at least two letters and two other characters (numbers 0-9 or punctuation).**

To change passwords

1. Click 'Change passwords' in the top right hand corner of the screen.
2. Enter your current administrator password.
3. If changing the administrator password, enter and re-enter the new administrator password into both fields provided.
4. If changing the staff password, enter and re-enter the new staff password into both fields provided.
5. Click 'Change password'. A confirmation will be displayed for each password changed.
6. Click 'Back' to return to the administrator screen.

Change passwords

Current Administrator password

REQUIRED

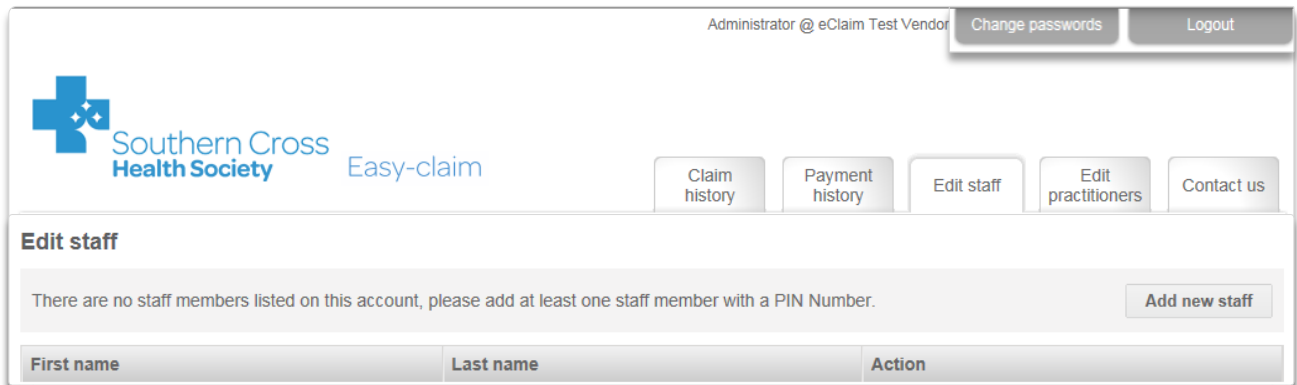
[Choose to change either the Administrator or Staff password here:](#)

Administrator account	Staff account
<small>Tip: Passwords must have at least 7 characters, including at least two letters and two other characters (numbers 0-9 or punctuation).</small>	
New password	New password
<input type="password"/>	<input type="password"/>
Re-enter new password	Re-enter new password
<input type="password"/>	<input type="password"/>

Change passwords screen

Set up staff PINs

Once the passwords have been changed, the Edit staff screen will display. You'll be prompted to add at least one staff member with a PIN.



Administrator @ eClaim Test Vendor [Change passwords](#) [Logout](#)

Southern Cross Health Society Easy-claim

[Claim history](#) [Payment history](#) [Edit staff](#) [Edit practitioners](#) [Contact us](#)

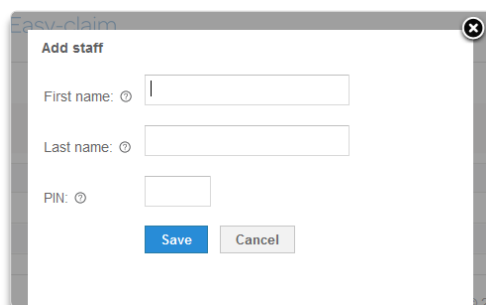
Edit staff

There are no staff members listed on this account, please add at least one staff member with a PIN Number. [Add new staff](#)

First name	Last name	Action
------------	-----------	--------

Edit staff screen

1. Click 'Add new staff'.
2. Enter the staff member's first and last name; assign them a unique PIN, then click 'Save'.
3. Repeat steps one and two until you've added each of your staff.
4. Provide staff with the staff account login details and their unique PIN.
Please advise the staff member that the PIN is required to prevent unauthorised use of the Easy-claim system and to identify the staff member submitting the claim.



Easy-claim

Add staff

First name:

Last name:

PIN:

[Save](#) [Cancel](#)

Add staff screen



Can I use the same PIN for all users?

No. The PIN assigned to each user must be unique; the system won't allow you to use the same PIN for more than one user.



Keep PINs and passwords secure

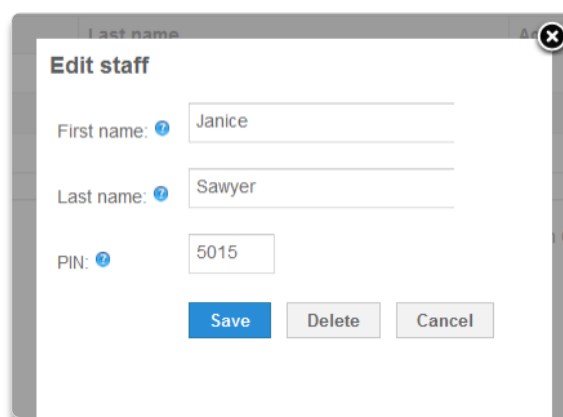
To maintain the integrity of the Easy-claim system, please ensure that PINs and passwords are not shared amongst staff or with others outside the practice. Writing down passwords is not recommended – if you forget your password, use the 'forgot password' link on the login page to reset it.

Removing or changing staff details

From time to time it may be necessary to change the details of staff who submit Easy-claims, due to staff changes, name changes, or accidental disclosure of their unique PIN.

Remove existing staff

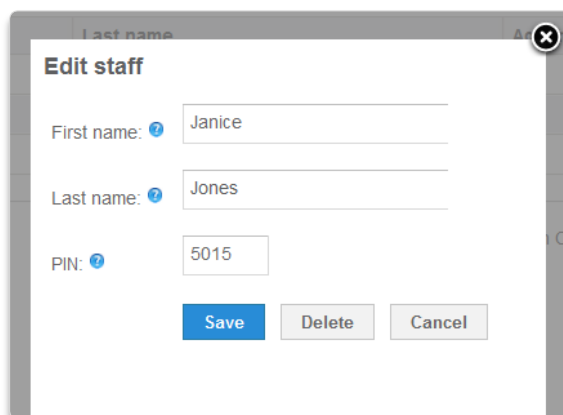
1. Ensure you are logged in as the **administrator**.
2. Click the 'Edit staff' tab
3. Locate the staff member and click 'Edit'
4. Click 'Delete'.
5. A confirmation message will appear. Double check and confirm Yes or No.

A screenshot of a web application window titled 'Edit staff'. The window has a close button (X) in the top right corner. Inside the window, there are three input fields: 'First name:' with the value 'Janice', 'Last name:' with the value 'Sawyer', and 'PIN:' with the value '5015'. Below these fields are three buttons: 'Save' (blue), 'Delete' (grey), and 'Cancel' (grey). The 'Delete' button is highlighted with a red rectangle.

Edit staff screen with delete option

Change existing staff

1. Ensure you are logged in as the **administrator**.
2. Click the 'Edit staff' tab.
3. Locate the staff member and click 'Edit'.
4. Edit the staff member's first name, last name or PIN as required, then click 'Save'.
5. Provide the staff with their new unique PIN if necessary.

A screenshot of a web application window titled 'Edit staff'. The window has a close button (X) in the top right corner. Inside the window, there are three input fields: 'First name:' with the value 'Janice', 'Last name:' with the value 'Jones', and 'PIN:' with the value '5015'. Below these fields are three buttons: 'Save' (blue), 'Delete' (grey), and 'Cancel' (grey). The 'Save' button is highlighted with a red rectangle.

Edit staff screen with last name changed

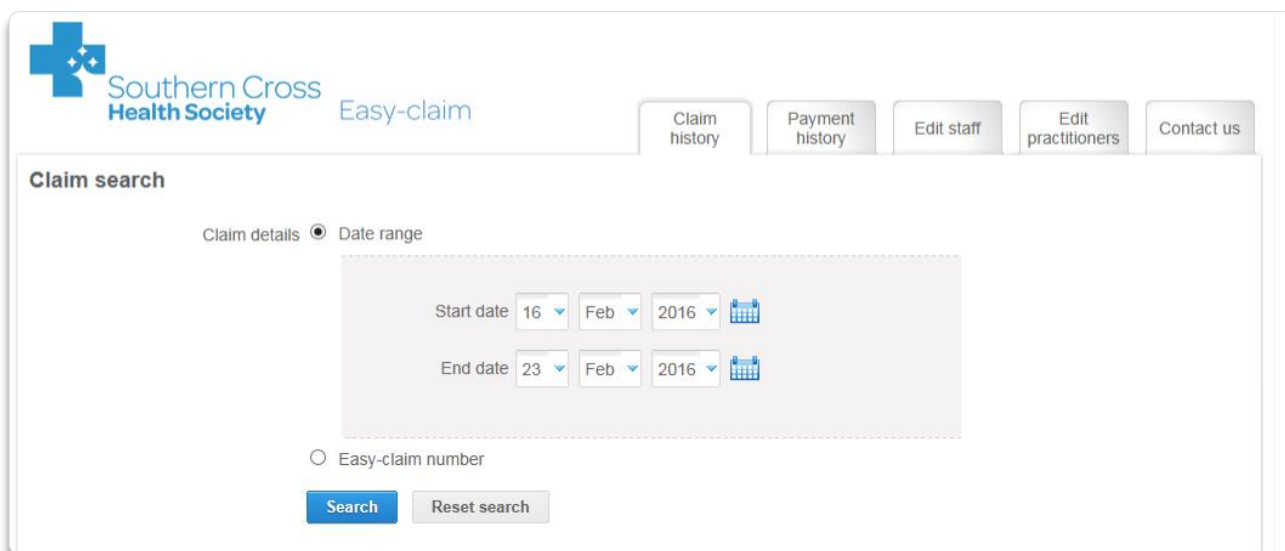
Administrator account

Claim history – Reversing a claim

From time to time you may need to reverse a claim, if it has been submitted incorrectly.

To reverse a claim

1. Ensure you're logged into the **administrator** account.
2. Click on the 'Claim history' tab – if you've just logged in, the claim history tab is the first screen you see.
3. You can search using a date range or Easy-claim number by clicking the appropriate option.
4. If searching using a date range:
 - select the payment entity if applicable
 - enter start and end date



Southern Cross Health Society Easy-claim

Claim history | Payment history | Edit staff | Edit practitioners | Contact us

Claim search

Claim details ☒ Date range

Start date: 16 Feb 2016

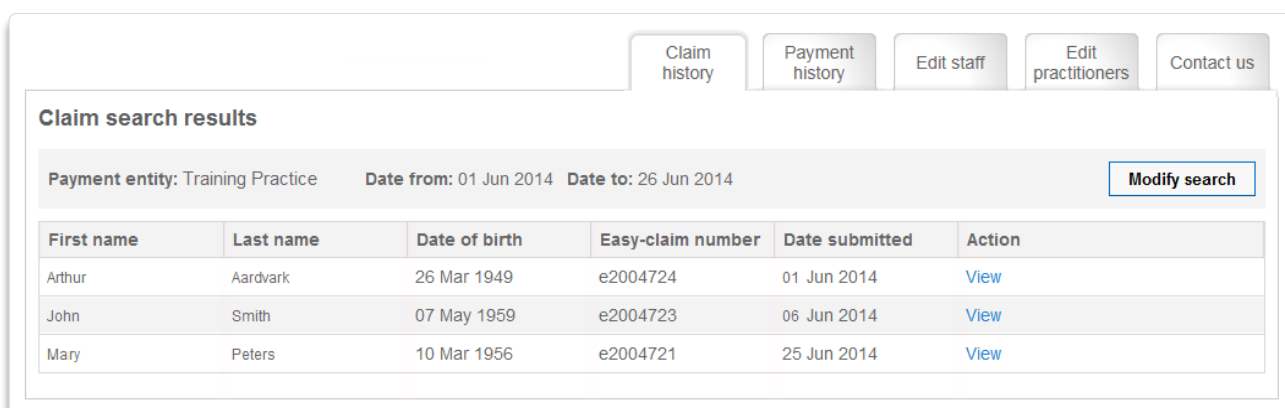
End date: 23 Feb 2016

☐ Easy-claim number

[Search](#) [Reset search](#)

Claim search by date range

5. Click 'Search'. A maximum of 50 claims will be displayed matching the search criteria. If you are unable to locate the claim required, try refining your search criteria.



Claim history | Payment history | Edit staff | Edit practitioners | Contact us

Claim search results

Payment entity: Training Practice Date from: 01 Jun 2014 Date to: 26 Jun 2014 [Modify search](#)

First name	Last name	Date of birth	Easy-claim number	Date submitted	Action
Arthur	Aardvark	26 Mar 1949	e2004724	01 Jun 2014	View
John	Smith	07 May 1959	e2004723	06 Jun 2014	View
Mary	Peters	10 Mar 1956	e2004721	25 Jun 2014	View

Claim search results

6. Once you have located the claim, click 'View' to display the claim summary.

Membership number: 22889659
Full name: Arthur Aardvark
Date of birth: 01 Oct 1960
Address: 123 Easy Street, Hamilton Central, Hamilton, 3204

Easy-claim number: e2002236
Submission date: 06 Jul 2012
Filed by: Janice Sawyer

Reverse | Print

Invoice number: INV189070 Payment entity: Training Practice

Total:	\$79.00	Southern Cross to pay:	\$79.00	Member to pay:	\$0.00
---------------	----------------	-------------------------------	----------------	-----------------------	---------------

1 Service provider: Betty Jones
Service: Service A
Service date: 19 Feb 2014
Service cost: \$79.00

Southern Cross to pay: \$79.00

Member to pay: \$0.00

Claim summary

7. If you need to reverse the claim, click 'Reverse'.

Please note: If no reverse option is displayed please contact the Easy-claim helpdesk on **0800 700 053**.

8. A confirmation message will appear. Double check and confirm Yes or No.

9. The claim will be reversed and the total amount claimed will be zero.

10. An amended summary of the claim can be printed by clicking 'Print'.

Membership number: 22889659
Full name: Arthur Aardvark
Date of birth: 01 Oct 1960
Address: 123 Easy Street, Hamilton Central, Hamilton, 3204

Easy-claim number: e2002236
Submission date: 06 Jul 2012
Filed by: Janice Sawyer

Claim has been reversed Print

Invoice number: INV189070 Payment entity: Training Practice

Total:	\$0.00	Southern Cross to pay:	\$0.00	Member to pay:	\$0.00
---------------	---------------	-------------------------------	---------------	-----------------------	---------------

1 Service provider: Betty Jones
Service: Service A
Service date: 19 Feb 2014
Service cost: \$0.00

Southern Cross to pay: \$0.00

Member to pay: \$0.00

Claim summary with reversal completed

Note: if the reversal is completed after Southern Cross has already paid the practice, the reversed amount will be deducted from any subsequent payments. These will be shown on the practice Remittance advice and the Claims assessment advice sent to the member.



Why can't I reverse this Easy-claim?

A claim that has not initially been paid by Southern Cross cannot be reversed in the Easy-claim system. If you need to reverse such a claim please call us on **0800 700 053**.

Is there a time limit involved with reversing Easy-claims?

No. However, we would expect that an Easy-claim reversal should occur on the day it was submitted.



Payment history

Once an Easy-claim has been submitted, Southern Cross will process the claim, make payment, and send notification of the payment to the member and the practice.

- Any payments due are paid to the practice overnight, but may take up to two days to show on the practice's bank statement.
- When a payment has been made, confirmation documents will be sent the following business day.
 - Members will receive a Claims assessment advice.
 - Practices will receive an email notification that the Remittance advice is ready to view within the Easy-claim system.
- Reversals of claims that have already been paid will be deducted from future payments to the practice. This will be shown on the Remittance advice.
- Payments are made every day, except Sunday and Public Holidays.

The Remittance advice will contain a list of payments for all claims that have been processed successfully since the last payment was made.

Viewing a Remittance advice

1. Click the link in the notification email, or open the Easy-claim login page.
2. Log in to the **administrator** account.
3. Click the 'Payment history' tab.
4. Select a payment entity if applicable.
5. Enter the dates of the Remittance advice you wish to search for. To search for one date only, enter the same date into both fields.
6. Click 'Search'.

The screenshot shows the 'Easy-claim' interface for Southern Cross Health Society. At the top, there is a navigation bar with the logo and several tabs: 'Claim history', 'Payment history' (which is active), 'Edit staff', 'Edit practitioners', and 'Contact us'. Below the navigation bar, the 'Payment search' section is displayed. It includes a 'Payment details' label and a search form with two rows of date pickers. The first row is for the 'Start date' (16 Feb 2016) and the second row is for the 'End date' (23 Feb 2016). Each date picker has a calendar icon to its right. Below the date pickers are two buttons: 'Search' and 'Reset search'. At the bottom of the interface, there is a footer with an 'Interactive help' link, a copyright notice '© 2016 Southern Cross Medical Care Society. All rights reserved.', and contact information: 'Easy-claim helpdesk: phone 0800 700 053 or email easy-claim@southerncross.co.nz'.

Payment history search

7. Search results will be displayed – you can either view or download the Remittance advice by clicking the appropriate option.

[Claim history](#)
[Payment history](#)
[Edit staff](#)
[Edit practitioners](#)
[Contact us](#)


Payment search results

Payment entity: Training Practice
 Date from: 01 Jul 2012
 Date to: 09 Jul 2012
 [Modify search](#)

Payment entity	Payment date	Amount	Document number	Action
Training Practice	02 Jul 2012	\$172.50	12789116	View Download
Training Practice	08 Jul 2012	\$25.00	12345678	View Download

Payment history search results

8. The EFT number on your Remittance advice will also show on the practice's bank statement to assist with your reconciliation process.



Southern Cross Health Society

Training Practice
456 Easy Street
Hamilton Central
NEW ZEALAND 3204

Southern Cross Medical Care Society
Level 1, Ernst & Young Building
2 Takutai Square, Auckland 1010
Private Bag 99934, Newmarket, Auckland 1149
Phone **0800 800 181**
www.southerncross.co.nz/society

Vendor ID 1234567
Payment amount \$450.00
Reference 12345678
EFT number 12345678
Page 1
Issued 13 AUG 2012

Remittance advice

Line	Invoice no.	Treatment date	Procedure code	Procedure description	Amount claimed	Amount paid	Contract no.
Arthur Aardvark D.O.B. 01-OCT-1960, Claim e123456, Member 12345678							
1		13 AUG 2012	9555011	Service A	\$90.00	\$50.00	
2		13 AUG 2012	0001550	Service B	\$658.00	\$400.00	
Total					\$748.00	\$450.00	

The payment of \$450.00 has been credited to your account 12-1234-0123456-00 on 13-AUG-2012

Please note that the claim(s) may have included additional items that are still being processed.
 Payment Terms: Southern Cross has processed the above claim(s) for the items listed above, and has paid you directly the policyholder's refund. This refund represents Southern Cross's Best End-of-month settlement of those items.

View Remittance advice



Can I view Remittance advice for more than one payment entity at a time?

No. From within the search results, click 'Modify search' to change the payment entity.



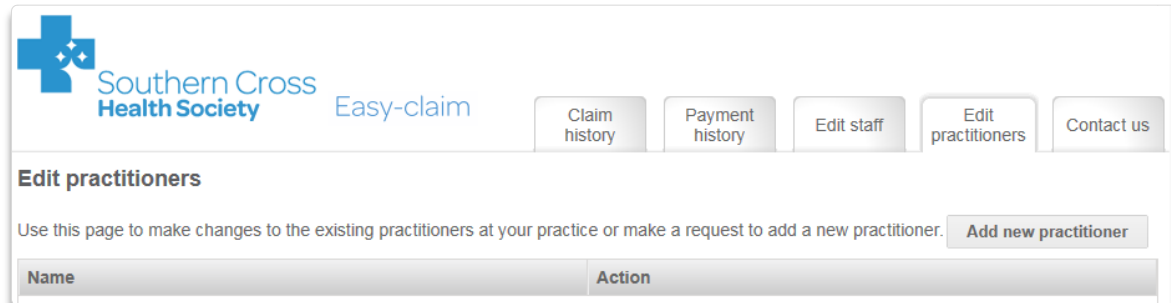
I look after multiple Easy-claim practices; can I receive a summary of payments to each practice?

Yes. We can provide consolidated reports by email at any frequency you require. Please call the Easy-claim helpdesk on **0800 700 053** to arrange this.

Edit practitioners

Adding practitioners

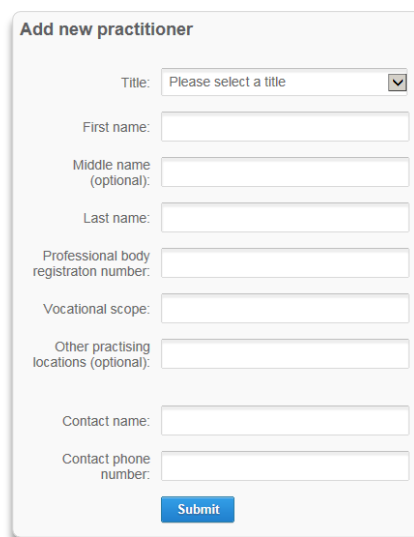
1. Ensure you are logged in as the **administrator**.
2. Click on the 'Edit practitioners' tab and select the option 'Add new practitioner'.



The screenshot shows the Southern Cross Health Society Easy-claim interface. At the top, there is a navigation bar with the logo and several tabs: 'Claim history', 'Payment history', 'Edit staff', 'Edit practitioners' (which is selected), and 'Contact us'. Below the navigation bar, the 'Edit practitioners' section is active. It contains a heading 'Edit practitioners' and a sub-heading 'Use this page to make changes to the existing practitioners at your practice or make a request to add a new practitioner.' To the right of the sub-heading is a button labeled 'Add new practitioner'. Below this is a table with two columns: 'Name' and 'Action'.

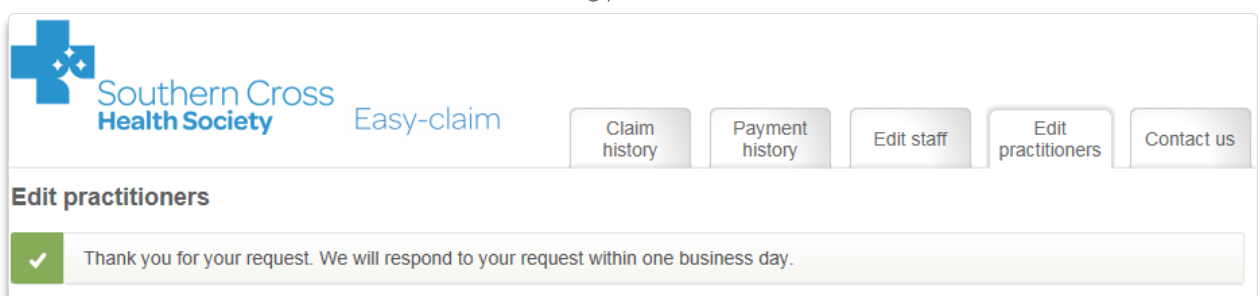
Adding practitioner

3. Using the 'Title' drop-down list, select the correct title of the provider.
4. Enter the first name, middle name (optional) and the last name of the provider.
5. Enter the professional body registration number.
6. If the provider has a vocational scope then enter the details. If there is no vocational scope then you can enter 'N/A'.
7. If the provider works from more than one location, provide the additional practicing location details.
8. Enter your contact name and phone number.
9. Click 'Submit' and you will receive a confirmation message advising your request has been sent successfully.



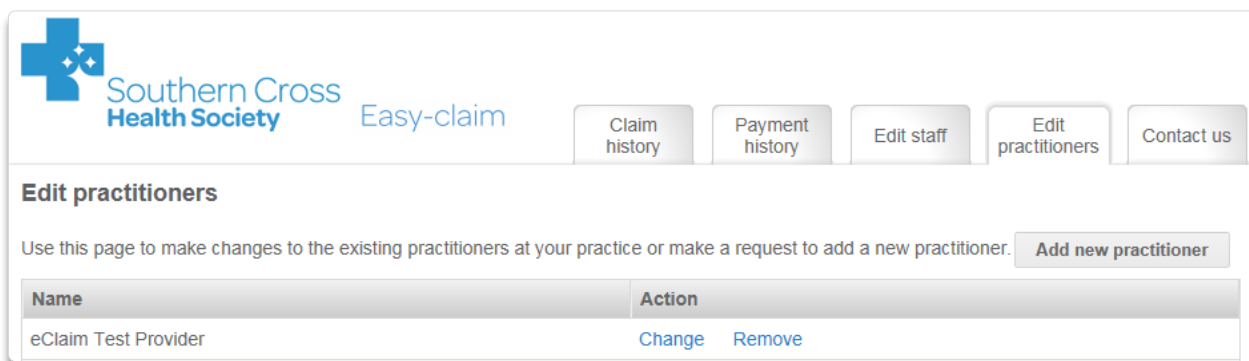
The screenshot shows the 'Add new practitioner' form. It has a title 'Add new practitioner' at the top. Below the title are several input fields: 'Title' (a drop-down menu with 'Please select a title' as the selected option), 'First name', 'Middle name (optional)', 'Last name', 'Professional body registration number', 'Vocational scope', 'Other practising locations (optional)', 'Contact name', and 'Contact phone number'. At the bottom of the form is a blue 'Submit' button.

Adding practitioner



The screenshot shows the Southern Cross Health Society Easy-claim interface. At the top, there is a navigation bar with the logo and several tabs: 'Claim history', 'Payment history', 'Edit staff', 'Edit practitioners' (which is selected), and 'Contact us'. Below the navigation bar, the 'Edit practitioners' section is active. It contains a heading 'Edit practitioners' and a sub-heading 'Thank you for your request. We will respond to your request within one business day.' To the left of the sub-heading is a green checkmark icon.

Editing/Removing practitioner information



The screenshot shows the 'Easy-claim' interface for Southern Cross Health Society. At the top, there are navigation tabs: 'Claim history', 'Payment history', 'Edit staff', 'Edit practitioners' (which is active), and 'Contact us'. Below the tabs, the 'Edit practitioners' section is titled. It includes a sub-header 'Edit practitioners' and a description: 'Use this page to make changes to the existing practitioners at your practice or make a request to add a new practitioner.' There is a button 'Add new practitioner' on the right. Below this is a table with two columns: 'Name' and 'Action'. The table contains one row with the name 'eClaim Test Provider' and two actions: 'Change' and 'Remove'.

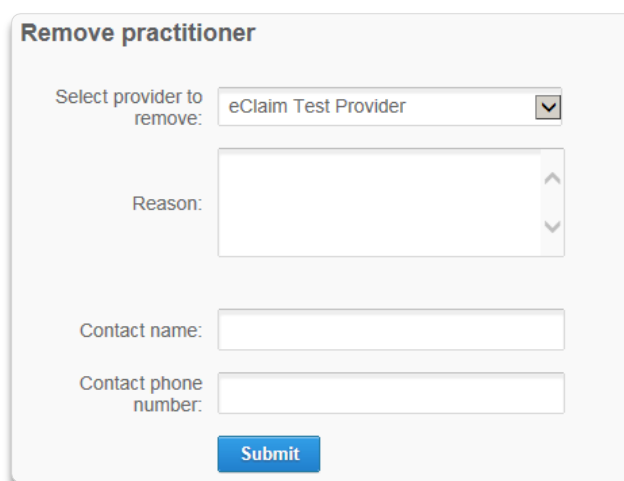
Name	Action
eClaim Test Provider	Change Remove

Changing/Removing practitioner

1. Ensure you are logged in as the **administrator**.
2. Click on the 'Edit practitioners' tab.
3. Click on the option 'Change', next to the practitioner you wish to edit.
4. Edit the information that you would like to update.
5. Click 'Submit' and you will receive a confirmation message advising your request has been sent successfully.

Removing practitioner information

1. Ensure you are logged in as the **administrator**.
2. Click on the 'Edit practitioners' tab.
3. Click on 'Remove' next to the Provider you wish to remove.
4. You will need to provide a reason for removing the Provider.
5. Enter your contact name and phone number.
6. Click 'Submit' and you will receive a confirmation message advising your request has been sent successfully.



The screenshot shows the 'Remove practitioner' form. It has a title 'Remove practitioner'. Below the title, there is a dropdown menu labeled 'Select provider to remove:' with 'eClaim Test Provider' selected. Below this is a text area labeled 'Reason:' with a scroll bar. Below the text area are two input fields: 'Contact name:' and 'Contact phone number:'. At the bottom of the form is a blue 'Submit' button.

Removing practitioner



What is the time frame for receiving a response once a request has been submitted?

For all requests that are submitted, you should receive a response within 1-3 business days. If you are requesting merchandise, one of our team members will be in touch with you within 1-3 business days to update you on the progress of the request.


Contact us

By clicking the Contact us tab, you can:

- request technical support
- request merchandising

Requesting support

1. Ensure you are logged in as the **administrator**.
2. Click on the 'Contact us' tab and select the option 'Request support'.
3. Enter the Easy-claim number if you are querying a claim.
4. Provide a description about your query
5. Enter your name.
6. Enter your contact phone number.
7. Click 'Submit' and you will receive a confirmation message advising your request has been sent successfully.

 Southern Cross Health Society Easy-claim

Claim historyPayment historyEdit staffEdit practitionersContact us

Contact form

Request supportRequest merchandising

Use this form when you have a query regarding the Easy-claim system. Please provide a description of your query and include your name. If it is about a claim, please include the Easy-claim number.

We will respond to your request within one business day.

Easy-claim number (optional): e

Description:

Contact name:

Contact phone number:

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Easy-claim helpdesk: phone 0800 700 053 or email easy-claim@southerncross.co.nz

Requesting technical support

Requesting merchandising

1. Ensure you are logged in as the **administrator**.
2. Click on the 'Contact us' tab and select the option 'Request merchandising'.
3. Select an item from the drop down list and enter the quantity you require.
4. Click 'Add'.
5. A table will display listing the item and quantity you have entered. If you need to change the quantity of an item you have added, delete that item and add it again with the correct quantity. For the 'Website graphic/logo', a quantity of 1 should be entered.

Item: Please select a material

Quantity:

Item	Quantity	Action
A4 Poster	2	Delete

6. Enter the name of the person receiving the materials.
7. Enter the contact number, address and any special delivery instructions if required.
8. Click 'Submit' and you will receive a confirmation message advising your request has been sent successfully.

Southern Cross Health Society Easy-claim

[Claim history](#) [Payment history](#) [Edit staff](#) [Edit practitioners](#) [Contact us](#)

Contact form

[Request support](#)
[Request merchandising](#)

Use this online form to order Easy-claim promotional material. Select the item required from the drop-down list, then enter the quantity and click Add. If you need to change the quantity of an item you have added, please delete that item and add it again with the correct quantity. If you require an Easy-claim logo for your website, select 'Website Logo' from the drop-down list and add '1' to the quantity box. Once you've finished adding items enter the delivery details and click Submit.

We will respond to your request within one business day.

Item: Please select a material

Quantity:

Delivery address:

Delivery instructions (optional):

Contact name:

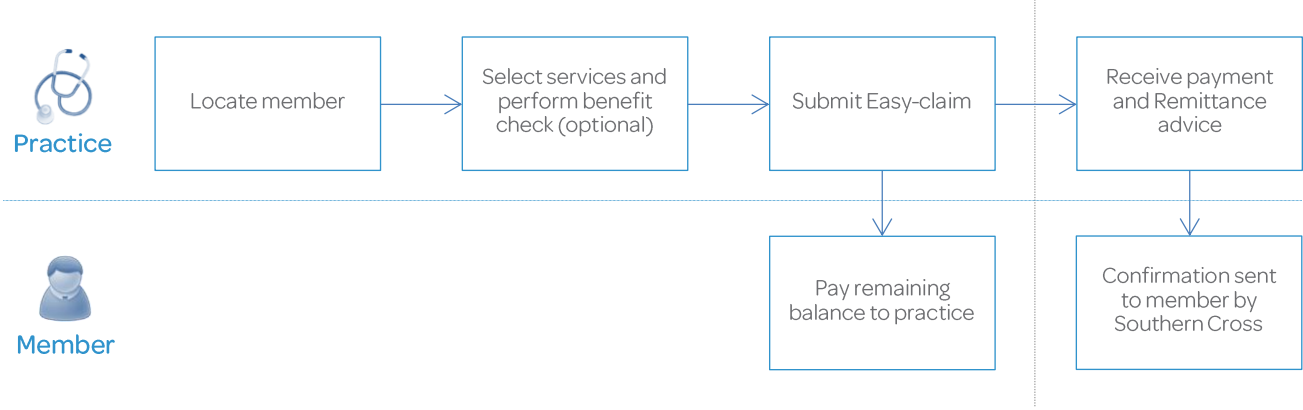
Contact phone number:

Requesting merchandising

Staff account – make a claim

Once the initial setup is complete, practice staff can submit claims using the **staff account**. This section explains the day-to-day steps to be followed when processing Easy-claims.

Easy-claim process overview



Searching for the member

All Southern Cross members over the age of 16 are issued with a Member card. The card shows both a 16-digit card number, and their membership number. Some members will use a 'digital card' on their mobile phone.

Physical member cards also contain a barcode which can be scanned or swiped, depending on the technology at your practice.

If the member does not have their card, or they are under 16, a name and date of birth search can be done.

Searches will return the details of all family members on the policy.



Steps

1. Ensure you're logged into the **staff account**.
2. Click on the 'Claim' tab – if you've just logged in, the Claim tab is the first screen you see.
3. Search for the member using one of the following options:
 - Member card number (if you have a barcode scanner connected to your computer, you can scan the barcode on the back of the Southern Cross Member card. Click on the Member card search option, select the second input box, then scan the barcode on the back of the card. Search results for the matching policy and its members will be displayed).
 - Name and date of birth.
 - Membership number.
4. Choose the date the service or treatment was provided to the member.
5. Click 'Search'.

A screenshot of the 'Member search' interface. At the top right, there are three tabs: 'Claim' (active), 'Claim history', and 'Contact us'. The main section is titled 'Member search'. Under 'Search using:', there are three radio button options: 'Member card number' (selected), 'Name and date of birth', and 'Membership number'. Below the 'Member card number' option is a search box with four input fields; the first contains '6101' and the second has a cursor. Below the other two options are their respective input fields. At the bottom, there is a 'Service date' section with dropdown menus for day (25), month (Jun), and year (2014), followed by a calendar icon. Two buttons, 'Search' and 'Reset search', are at the bottom.

Member card number search

6. Within the search results, locate the member you wish to claim for and click anywhere along the blue highlighted line containing the member's name.
- If no matches were found, confirm the member's details. If incorrect, click 'Modify search' and repeat steps three and four.
 - If you're still unable to locate a match, please ask the member to contact Southern Cross for assistance on **0800 800 181**. You won't be able to process an Easy-claim until you've located the member in the system.

[Claim](#)[Claim history](#)[Contact us](#)

Member search results

Member card number: 6101112884694081 Service date: 25 Jun 2014 [Modify search](#)

First name	Last name	Date of birth	Age	Address	Action
Arthur	Aardvark	01 Oct 1960	53	123 Easy Street, Hamilton Central, Hamilton, 3204	Select member
Joan	Aardvark	14 Jul 1963	50	123 Easy Street, Hamilton Central, Hamilton, 3204	Select member

Member card search results



What if the member doesn't have their Member card?

You can also search for the member using their membership number or full name and date of birth.

Searching the details of another member on the same policy (e.g. a parent) will show all members on that policy.

What if the member presents a 'plus' card?

Some members may present an old blue 'plus' card and not the orange branded Member card. You can try to use the old card number, but their card number may have changed. We recommend the member contacts Southern Cross to get their orange branded card.



Have you selected the correct member?

Members receive a Claims assessment advice for all claims submitted, so it's important that you select the correct member to avoid any confusion. If you're unsure of the identity of the Southern Cross member, confirm their details against your own database or ask for other suitable identification.

Submitting a claim

Once you've selected the member, the Claim details screen will be displayed.

Enter the service or treatment details

- Using the 'Service provider' drop-down list, select the name of the service provider (clinician/practitioner who provided the treatment or service). For practices with only one service provider, this list will not be displayed.

Membership number: 22889659
Full name: Arthur Aardvark
Date of birth: 01 Oct 1960
Address: 123 Easy Street, Hamilton Central, Hamilton, 3204

Not the right person?
[Change member](#)

Claim details

1

Service provider:

Service:

ACC related:

Service date:

Benefit check (optional):

Service cost:

- Next, use the 'Service' drop-down list to select the service or treatment to be claimed. You can also start typing the name of the service and a list of matches will appear as you type.
 - To assist with service selection, some practices may have the option to view service definitions. Click the link below the 'Service' list to display these.
 - Some practices may also see an 'other' option which enables them to claim services that are not listed. Where an 'other' service is selected, a free-text field will appear next to the service selector where a description of the service must be entered.

Membership number: 22889659
Full name: Arthur Aardvark
Date of birth: 01 Oct 1960
Address: 123 Easy Street, Hamilton Central, Hamilton, 3204

Not the right person?
[Change member](#)

Claim details

1

Service provider:

Service:

ACC related:

Service date:

Benefit check (optional):

Service cost:

- If the service provided relates to an ACC claim place a tick in the 'ACC Related' box by clicking it.
- Choose the date the service or treatment was provided to the member.
- Enter the **full cost** of the service or treatment into the 'Service cost' field (i.e. the amount you intend to invoice the member).

Membership number: 22889659
Full name: Arthur Aardvark
Date of birth: 01 Oct 1960
Address: 123 Easy Street, Hamilton Central, Hamilton, 3204

Not the right person?
[Change member](#)

Claim details

1

Service provider:

Service:

[Click here for Service definitions](#)

ACC related: ☐ Yes

Service date:

Benefit check (optional):

Service cost:



What if I can't find the service/treatment provided in the list?

The service selector contains a list of services that are currently able to be claimed electronically via the Easy-claim system.

If the service provided is not listed then you cannot claim for it using Easy-claim. The member will need to pay the practice directly, and they can manually submit a claim to Southern Cross.

If you wish to suggest a change to the list of available services, please call the Easy-claim helpdesk on **0800 700 053**.

Perform a benefit check (optional)

Before you make a claim, you can check if the member has the applicable benefit on their policy for the service or treatment. Enter the service details then click 'Check benefit'. It's important to note that the benefit check outcome is only an indication of whether a benefit exists on the policy for the service being claimed. It is not a guarantee that Southern Cross will make a payment towards the claim.

Benefit available

If a benefit is available "benefit exists" will be displayed and the policy information will be highlighted in green. The member's plan description, annual benefit limit, event limit (if applicable) and any co-insurance amount will be displayed.

- Please note that **if the outcome shows 'benefit exists' this is not a guarantee the claim will be paid.** For various reasons Southern Cross may not pay a member's claim despite the member having a benefit available for that service or treatment on their policy.

Benefit check (optional): ?

Check benefit

Benefit exists - subject to policy terms and conditions
Please note: this is not a guarantee that the claim will be paid

Plan description: ? Wellbeing Two - Day to Day Care, Vision and Dental Care

Event limit: ? \$65.00

Benefit available



What do each of the benefits or limits mean?

The *event benefit or limit* shows the maximum amount Southern Cross may contribute to the cost of the service or treatment.

The *annual benefit or limit* shows the maximum amount Southern Cross may contribute overall, during the member's claims year.

Benefit not available

If no benefit is available on the member's policy for the chosen service or treatment, "No benefit available" will appear highlighted in red. If needed, members can call Southern Cross on **0800 800 181** for more information about their policy and benefits.

Benefit check (optional): ?

Check benefit

No benefit available - for more information, the member can call Southern Cross Health Society on 0800 800 181.

Benefit not available



Is a benefit check compulsory?

No – it's not. However the result of this check is likely to influence the member's decision on whether to continue with the Easy-claim.

Adding services and treatments

You can add up to five services or treatments per claim.

You can select 'Add service' and additional service fields will appear.

Complete the service details (select the service provider, service, whether it's ACC related, service date and then enter the cost of the service).

You are able to complete a benefit check for each service.

Claim details

1

Service provider: ?

Betty Jones

Service: ?

Service A

[Click here for Service definitions - GPs only](#)

ACC related: ?

☐ Yes

Service date: ?

11

Nov

2013

Benefit check (optional): ?

Check benefit

Service cost: ?

\$100.00

X

2

Service provider: ?

Tom Adams

Service: ?

Service B

[Click here for Service definitions - GPs only](#)

ACC related: ?

☐ Yes

Service date: ?

11

Nov

2013

Benefit check (optional): ?

Check benefit

Service cost: ?

\$50.00

Add service

X

Claim with additional service added

Removing unwanted services


If a service has been added in error, or the member changes their mind about claiming for it, you can remove the service by clicking the 'X' icon to the right of the page.

Completing the claim

1. Using the 'Payment entity' drop-down list, select the bank account for claim payment. *For practices with only one bank account loaded, this list will not be displayed.*
2. Enter an invoice or reference number if required. – limit of 10 characters.
3. Enter your unique PIN.
4. Click 'Submit'.

Claim details

1


Service provider:  Betty Jones


Service:  Service A

[Click here for Service definitions - GPs only](#)

ACC related:  ☐ Yes


Service date:  11 Nov 2013 

Benefit check (optional):  [Check benefit](#)

Service cost:  \$100.00

X

2


Service provider:  Tom Adams


Service:  Service B

[Click here for Service definitions - GPs only](#)

ACC related:  ☐ Yes

Service date:  11 Nov 2013 


Benefit check (optional):  [Check benefit](#)


Service cost:  \$50.00

[Add service](#)

X

Make claim

Claim total:  \$150.00

Invoice number (optional):  1234

PIN: 

[Submit](#)

Completed claim screen

Confirm the claim details

Check the claim details on this screen before submitting the Easy-claim.

1. If you need to modify the claim click 'Modify claim'
2. If you are happy with the claim, click 'Confirm and submit' to send the claim details to Southern Cross for assessment.

[Claim](#)[Claim history](#)[Contact us](#)

Check the claim details. Then select either "Confirm and submit" or "Modify claim".

Member details

Membership number: 22889659

First name: Arthur

Last name: Aardvark

Date of birth: 01 Oct 1960

Address: 123 East Street, Hamilton Central, Hamilton, 3204

Claim details

1

Service provider: Betty Jones

Service: Service A

Service date: 11 Nov 2013

Service cost: \$100.00

2

Service provider: Tom Adams

Service: Service B (ACC related)

Service date: 11 Nov 2013

Service cost: \$50.00

Make claim

Claim total: \$150.00

Payment entity: Training Practice

Invoice number (optional): INV189070

Claim filed by: Janice Sawyer

[Confirm and submit](#)[Modify claim](#)

Claim confirmation screen

Claim outcomes

Once the claim has been processed, a claim summary page will be displayed showing the outcome. You have an option to print the claim summary for the member's records. If you choose 'Yes', a PDF version of the claim summary will open for printing.

The claim outcome is displayed on screen, and the payment amounts are shown in two columns:

- Southern Cross to pay (the amount Southern Cross is paying).
- Member to pay (the amount the member needs to pay, if any).

If there is no contribution from Southern Cross, the claim will be manually reviewed and Southern Cross will advise the member of the final outcome.

Membership number: 22889659 Full name: Arthur Aardvark Date of birth: 01 Oct 1960 Address: 123 Easy Street, Hamilton Central, Hamilton, 3204	Easy-claim number: e2001403 Submission date: 11 Nov 2013 Filed by: Janice Sawyer
Claim successfully sent to Southern Cross. Southern Cross will send a Claims Assessment Advice to the member.	
Invoice number: INV189070 Payment entity: Training Practice	
Total: \$150.00	Southern Cross to pay: \$150.00 Member to pay: \$0.00
1 Service provider: Betty Jones Service: Service A Service date: 11 Nov 2013 Service cost: \$100.00	Southern Cross to pay: \$100.00 Member to pay: \$0.00
2 Service provider: Tom Adams Service: Service B (ACC related) Service date: 11 Nov 2013 Service cost: \$50.00	Southern Cross to pay: \$50.00 Member to pay: \$0.00

Claim summary



Why hasn't the claim been paid by Southern Cross?

Common reasons why a claim may not be paid (or be paid immediately) include:

- there's no benefit on the policy for the service or treatment being claimed
- the annual benefit has been used up
- policy premiums are not up to date
- the member is new to Southern Cross and is claiming within their minimum stand-down period
- the value of the claim has exceeded a threshold and requires manual assessment by Southern Cross.

Please do not try to explain to the member why Southern Cross may or may not have contributed to the amount due. We suggest the following wording be used where the member is concerned with the level of reimbursement: *"For more details about this claim, please call Southern Cross as we don't know the specifics of your policy. Their number is **0800 800 181**".*

I didn't receive the result I expected. Can I try again?

No. Please accept the result and advise the member. Processing the claim again will create duplicate records and confusion for the member.



What if the system is unavailable?

If the system is unavailable, the member will need to pay the practice directly and manually submit a claim to Southern Cross.

Possible claim outcomes

There are three possible outcomes when you submit an Easy-claim.

1. Southern Cross pays the full amount

'Member to pay' amount is \$0.00.

Total: \$100.00		Southern Cross to pay: \$100.00	Member to pay: \$0.00
1	Service provider: Betty Jones Service: Service A Service date: 11 Nov 2013 Service cost: \$100.00	Southern Cross to pay: \$100.00	Member to pay: \$0.00

2. Southern Cross pays part of the amount

'Member to pay' is a partial payment of the 'Total'. If there are multiple services or treatments within the one claim, some may not have been reimbursed in full, or at all. This could mean the cost of the service or treatment is more than is available on the member's policy. **The member must pay the 'Member to pay' amount before leaving the practice.**

Total: \$75.00		Southern Cross to pay: \$40.00	Member to pay: \$35.00
1	Service provider: Betty Jones Service: Service A Service date: 11 Nov 2013 Service cost: \$75.00	Southern Cross to pay: \$40.00	Member to pay: \$35.00

3. No payment from Southern Cross

'Member to pay' is equal to the 'Total' service cost. **The member must pay the 'Member to pay' amount before leaving the practice.**

Total: \$245.00		Southern Cross to pay: \$0.00	Member to pay: \$245.00
1	Service provider: Betty Jones Service: Service A Service date: 11 Nov 2013 Service cost: \$245.00	Southern Cross to pay: \$0.00	Member to pay: \$245.00

Next steps

Within the claim summary screen you have the following options.

Make a new claim

- This option will take you to the 'Member search' screen, to restart the Easy-claim process.

Print

- This option will open a PDF version of the claim summary for printing.

Membership number: 22889659

Full name: Arthur Aardvark

Date of birth: 01 Oct 1960

Address: 123 Easy Street, Hamilton Central, Hamilton, 3204

Easy-claim number: e2001403

Submission date: 11 Nov 2013

Filed by: Janice Sawyer

Claim successfully sent to Southern Cross.
Southern Cross will send a Claims Assessment Advice to the member.

Make new claim | Print

Invoice number: INV189070

Payment entity: Training Practice

Total:	\$150.00	Southern Cross to pay:	\$150.00	Member to pay:	\$0.00
1	Service provider: Betty Jones Service: Service A Service date: 11 Nov 2013 Service cost: \$100.00	Southern Cross to pay:	\$100.00	Member to pay:	\$0.00
2	Service provider: Tom Adams Service: Service B (ACC related) Service date: 11 Nov 2013 Service cost: \$50.00	Southern Cross to pay:	\$50.00	Member to pay:	\$0.00


Contact us

By clicking the Contact us tab, you can request any technical support you need regarding using the system or any claims that you have submitted.

If you have an urgent request, please contact our Easy-claim helpdesk on 0800 700 053

Requesting support

1. Ensure you're logged into the **staff account**.
2. Click on the 'Contact us' tab and select the option 'Request support'.
3. Enter the Easy-claim number if you are querying a claim.
4. Provide a description about your query
5. Enter your name.
6. Enter your contact phone number.
7. Click 'Submit' and you will receive a confirmation message advising your request has been sent successfully.

 Southern Cross
Health Society

Easy-claim

[Claim](#) [Claim history](#) [Contact us](#)

Contact form

[Request support](#)

Use this form when you have a query regarding the Easy-claim system. Please provide a description of your query and include your name. If it is about a claim, please include the Easy-claim number.

Thank you for your request. We will respond to you within one to three business days.

Easy-claim number (optional):

Description:

Contact name:

Contact phone number:

Contact email address:

[Submit](#)

Easy-claim helpdesk: phone 0800 700 053 or email easy-claim@southerncross.co.nz

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Requesting technical support

Easy-claim support

Common member questions

Below are some common questions and our suggested responses that may help you assist Southern Cross members throughout the Easy-claim process.

Why didn't Southern Cross pay my claim?

We do not have information about why a claim is not paid. To find out more please contact Southern Cross on **0800 800 181**.

How much do I have left of my benefit?

We can't access that information. You will need to contact Southern Cross on **0800 800 181** for details about your policy.

How was my refund worked out?

The Southern Cross system advises us how much Southern Cross will contribute, based on your policy type and benefit available. For details about the claiming process and benefits under your policy, you'll need to talk to Southern Cross on **0800 800 181**.

Can you please call Southern Cross for me?

Sorry, I can't due to privacy reasons. You'll need to speak to Southern Cross yourself on **0800 800 181**.

For any other general questions from Southern Cross members

If you have any questions or would like further information on the Southern Cross Easy-claim process, please call Southern Cross on **0800 800 181**.

Easy-claim system support and questions

Unexpected system errors and outages

If you receive an 'unexpected error' message, it's possible that the Easy-claim system has timed-out. Please:

- restart your web browser
- begin the Easy-claim process again.

If you continue to experience issues:

- Advise the member that you can't submit the Easy-claim at this time. They will need to pay, collect their receipt, and send it to Southern Cross to be processed.
- Call the Easy-claim helpdesk on **0800 700 053**. It's helpful to note the steps you took that led you to the error.

Planned system outages

If there is an outage initiated by Southern Cross, your administrator will be advised by email before the outage.

Access to the Easy-claim system will be disabled by Southern Cross during the outage.

Changes to practice details

From time to time it may be necessary to change the details of the practice, due to changes of:

- physical or mailing addresses
- bank account details
- key contact people.

Some changes may require forms to be completed. The Easy-claim team will let you know if this is necessary. Contact them on **0800 700 053** or **easy-claim@southerncross.co.nz**.

Any other questions or issues relating to Easy-claim

Please feel free to contact the Easy-claim helpdesk on **0800 700 053** or **easy-claim@southerncross.co.nz**

Glossary of terms

Administrator account. The practice account within the Easy-claim system which is used for maintaining staff and practice details.

Annual benefit. The maximum amount a member can be reimbursed by Southern Cross under a benefit in any one claims year. Please note that an event limit may also apply.

Benefit. A type of healthcare service for which costs can be reimbursed as outlined in a member's policy.

Benefit check. An optional function which allows a practice to check whether a benefit exists on the member's policy for a particular service or treatment.

Claims assessment advice. A document generated by Southern Cross and provided to members for any claim submitted or reversed under their policy.

Claim reversal. Withdrawing a previously submitted claim within the Easy-claim system.

Claims year. The first 12 months following the policy start date and each successive 12 month period from each claims anniversary date.

Co-insurance. A provision of a policy where a certain amount of the cost of a service or treatment must be covered by the member.

Easy-claim system. The Southern Cross online portal through which the Easy-claim service is run.

Event limit. The maximum amount Southern Cross can contribute toward the cost of the service (where a claim is accepted), each time a claim for the service is made. Please note that an annual benefit limit may also apply.

Member. A policyholder and the policyholder's spouse or partner and their dependants who are members of Southern Cross.

Member card number. Southern Cross Member card numbers are provided to all members. Physical Member cards are issued to members over the age of 16 years.

Member data. The personal and health information (including name, Member card number, membership number, contact details and medical history) of each member collected by the practitioner in relation to the eligible healthcare services.

Payment entity. The name of the person or business to which payment is being made.

Plan description. The description of the specific Southern Cross insurance plan that the member has.

Policy. The contract of insurance between Southern Cross and the policyholder.

Remittance advice. A document generated by Southern Cross and provided to practices for any payments and reversals completed within the Easy-claim system by their practice.

Staff account. The practice's account within the Easy-claim system which is used in order to submit claims and view claims history.

Service. The treatment or items provided to the member.

Service cost. The full cost of the services or treatments provided to the member.

Service date. The date the services or treatments were provided.

Service provider. The name of the clinician or practitioner who performed the service

Email **easy-claim@southerncross.co.nz**
or call us on **0800 700 053**

Southern Cross Health Society Easy-claim
Private Bag 3216
Waikato Mail Centre
Hamilton 3240