

My Claims User Reference Guide



This guide will help you navigate the *My Claims* portal as well as the Apple (iOS) and Android *My Claims* app.

THANK YOU FOR choosing to use the new *My Claims* portal and/or app to manage your benefits. While it's designed to be user friendly, we've pulled together a reference guide — just in case you need it.

Please note that the screenshots contained in this guide are from the web-based portal. The functionality on the mobile app is the same, but it will look slightly different.

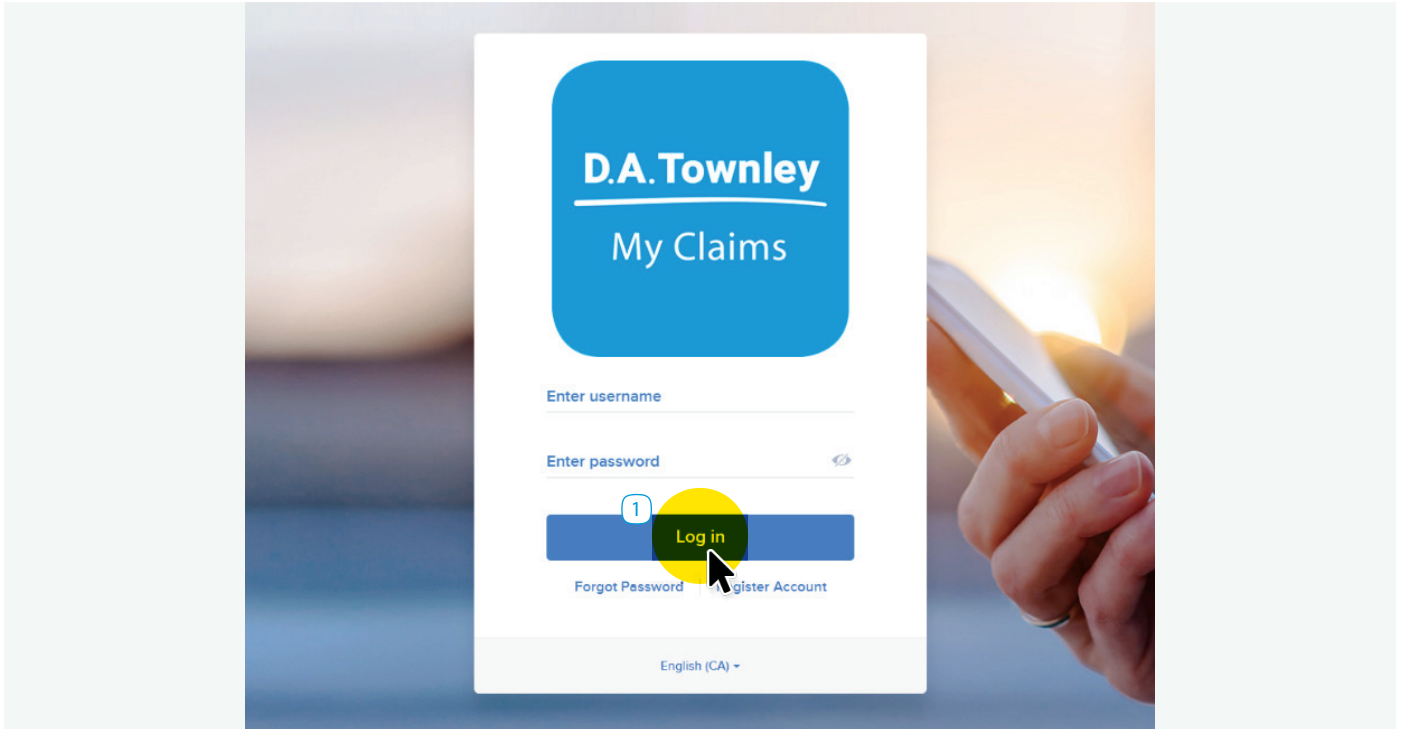


IMPORTANT!

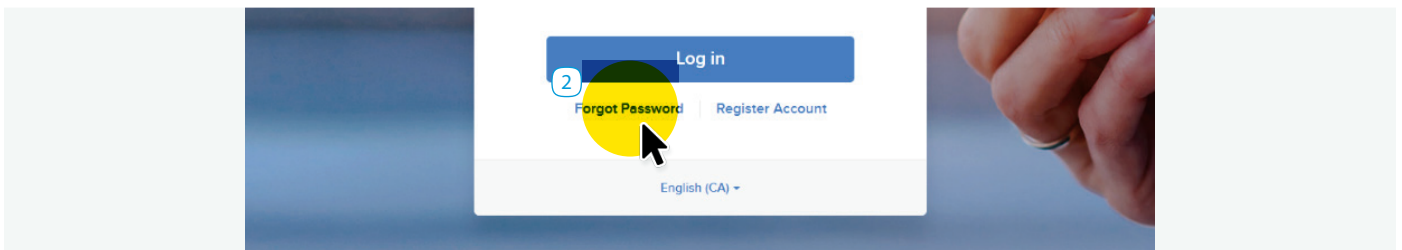
You must be registered for a *My Claims* account before accessing the *My Claims* portal. If you do not have an account, please refer to the [Registration Guide \[PDF\]](#) or the D.A. Townley [website](#) for help on how to register.

LOG IN TO MY CLAIMS

Once the application has been launched on your device, the following screen will appear. Use the username and password you created when you set up your account, and click/tap *Log in* ①.



If you forgot your password, click/tap *Forget Password* ② to reset it.



THE DASHBOARD

After you've logged in, you'll be taken to your home screen, called the *Dashboard*.

From here you can see your benefits coverage (1) and claims history (2), update your direct deposit information (3), access notifications (4), or customize the benefits tiles (5) that show you the current balance remaining for select claim types.

This screen is also where you can submit a new claim (6) online or see the last few claims submitted on behalf of you or your dependents (7).

The screenshot displays the MyClaims Dashboard interface. At the top, there is a navigation bar with tabs for 'Dashboard', 'My Benefits', and 'History'. On the right side of the navigation bar, there are icons for a user profile, a megaphone, and a notification bell, followed by a 'Submit a Claim' button. Below the navigation bar, there are three large blue tiles representing different benefit categories: 'Dental Major', 'Physiotherapy', and 'Chiropractor'. Each tile shows a donut chart indicating the remaining balance and the total maximum for that category. Below the tiles, there are two sections: 'Claim This Again' and 'Recent Claims'. The 'Claim This Again' section lists four providers with their names and specialties. The 'Recent Claims' section lists four recent claims with their dates, provider names, and submitted amounts.

Benefit Category	Remaining Balance	Maximum
Dental Major (ending Dec 31, 2020)	\$0.00	\$1,500.00 Combined Maximum
Physiotherapy (ending Dec 31, 2020)	\$262.00	\$500.00 Procedure Maximum
Chiropractor (ending Dec 31, 2020)	\$500.00	\$500.00 Procedure Maximum

Claim This Again
Dr. Tyler Johnson (Health)
Dr. R. Scott Bell (Health)
Dr. R. Scott Bell (Dental)
Dr. Jeffrey Y. Okamura (Dental)

Recent Claims
Message Therapists (submitted Oct 20, 2020 for Dr. Tyler Johnson) - submitted \$105.00
Message Therapists (submitted Sep 26, 2020 for Dr. R. Scott Bell) - submitted \$200.00
Annual/Recall Exam (submitted Oct 22, 2020 for Dr. R. Scott Bell) - submitted \$3,000.00
One Surface, Restorations, Tooth Coloured/Plasti... (submitted Sep 30, 2020 for Dr. Jeffrey Y. Okamura) - submitted \$100.00

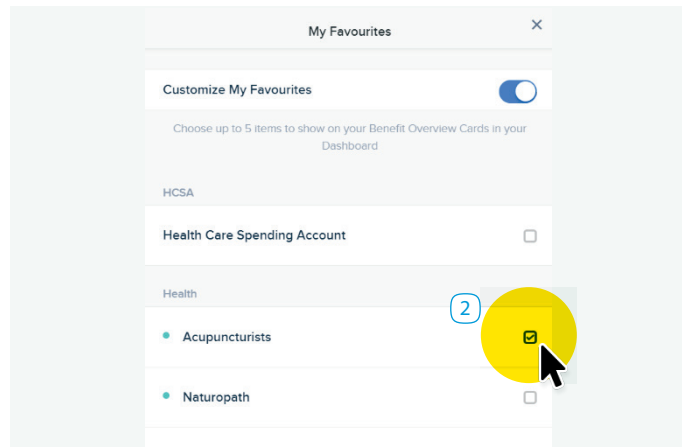
BENEFITS TILES

The benefits tiles provide a snapshot of your real-time claims balance for up to five of your favourite benefits. If you have submitted a claim online and the remaining balance doesn't change, simply refresh your screen to update the balance.

If you click/tap on the tile you'll get the coverage information for that benefit including the coverage status, percentage of the benefit your plan covers, benefit period, and maximum coverage amount.

To customize the benefits tiles you want displayed on your *Dashboard*, click/tap the little star icon in the top right corner of a tile (1). This will open your *My Favourites* screen.

On *My Favourites*, you can add a check mark in the box beside the benefits you'd like to display (to a maximum of five) (2). Only items that are covered and have a dollar maximum under your plan can be selected for display.



MY BENEFITS TAB

The *My Benefits* tab on the *Dashboard* provides a quick overview of your available coverage levels including the Balance Remaining, your Coverage Status (3), your Reimbursement Percentage (4), and the Maximum Amount allowable for the benefit period (5).

You can search this list by provider type or procedure using the categories on the left side of the screen.

Click/tap *Resources* (6) in the upper right corner of the screen to view your claim forms for manual claim submissions.



HISTORY TAB

The *History* tab on your *Dashboard* will display your most recent claims history, which can be viewed by Benefit Type or by Patient.

Use the filter options on the left side of the screen to help you easily find the benefit information you're looking for.

If you're accessing *My Claims* from your web browser, you have the option to export your claims history in a .csv file ¹. It may be helpful at tax time to have all your benefits information in one document.

The screenshot shows the 'History' tab in the My Claims dashboard. The interface includes a navigation bar with 'Dashboard', 'My Benefits', and 'History' tabs. On the right, there are icons for user profile, notifications, and a 'Submit a Claim' button. On the left, there are filter options for 'Show' (Claims, Predetermination, Weekly Indemnity), 'Benefit Type' (Health, Drug, Dental), 'Patient' (Joe Smith), and 'By Status' (approved, rejected, submitted). The main content area displays a table of claims for Joe Smith, with columns for Patient, Benefit Type, Date, Status, and Amount. A yellow circle with a '1' highlights the 'Export .CSV' button in the top right corner.

Patient	Benefit Type	Submitted Total: \$3,810.00	Paid Total: \$288.00
Joe Smith	Annual/Recall Exam	Oct 22, 2020 for Dr. R. Scott Bell	submitted \$3,000.00
	Massage Therapists	Oct 20, 2020 for Dr. Tyler Johnson	submitted \$105.00
	Physiotherapy	Oct 17, 2020 for Dr. Tyler Johnson	submitted \$120.00 paid \$84.00
	Physiotherapy	Oct 15, 2020 for Dr. R. Scott Bell	submitted \$100.00 paid \$70.00

Click/tap on a specific claim to open the claim details. If the colour on the top of the pop-up screen is orange, the claim has been submitted. If it's green, the claim has been approved and paid.

If your claim has been processed, you will automatically receive your Benefits Statement via the email address on record. You can download a PDF version of your statement by clicking/tapping *Statement* where indicated ².

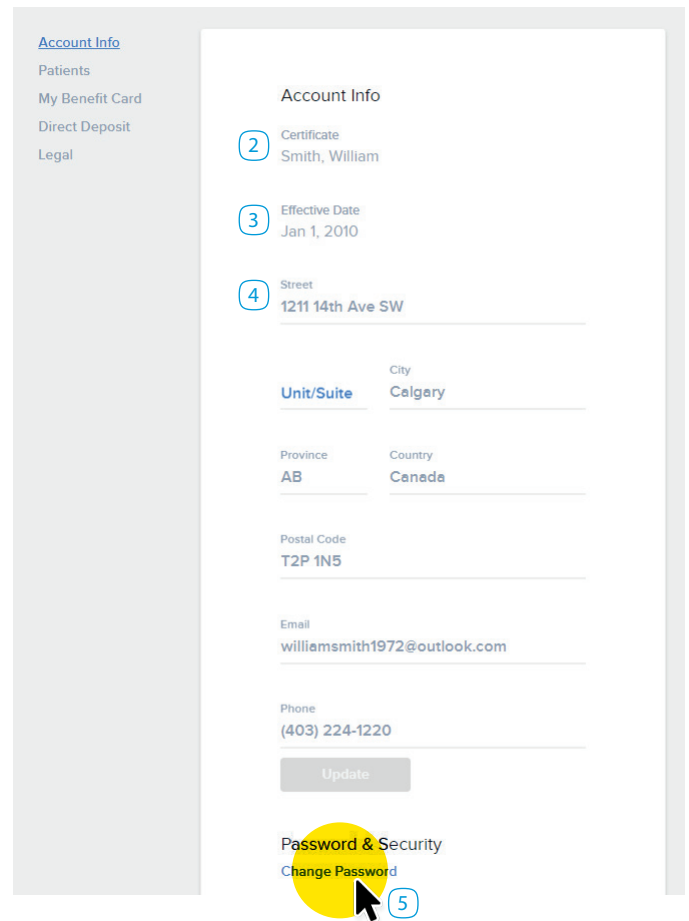
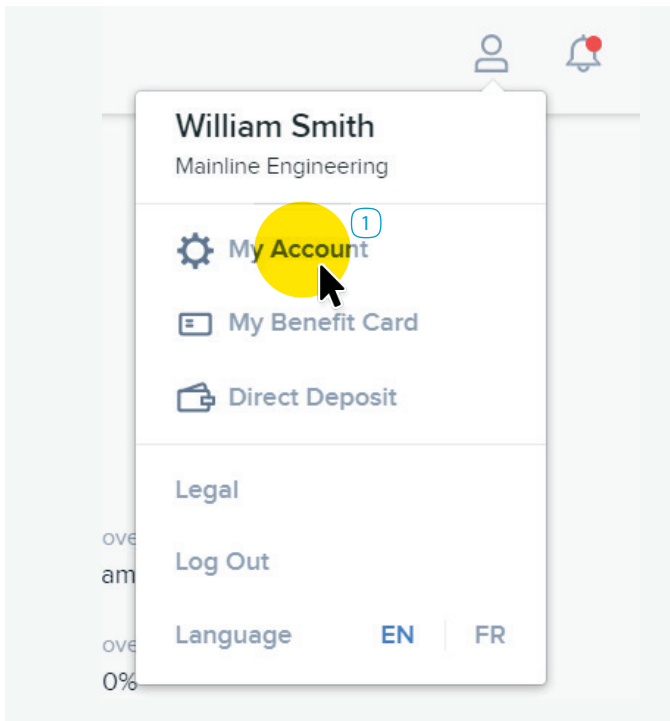
The two screenshots show the 'Claim Details' pop-up screen. The top screenshot shows a claim that is 'SUBMITTED' with an orange header. The bottom screenshot shows a claim that is 'APPROVED' with a green header and a 'Statement' button highlighted by a yellow circle with a '2'.

MY ACCOUNT

To view your account details, click/tap the *Person* icon, and then *My Account* (1).

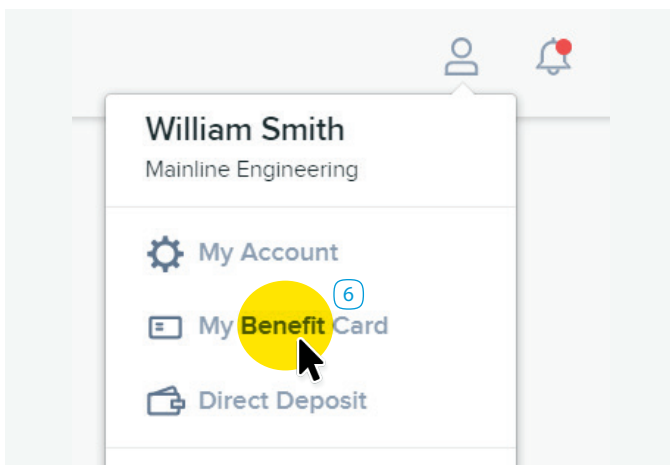
The Account Info tab will display your name (2), the effective date of your coverage (3), and your address information (4). Go to the Patients tab to see the same information for your dependents on file.

This is also where you can change your password for the *My Claims* portal (5).



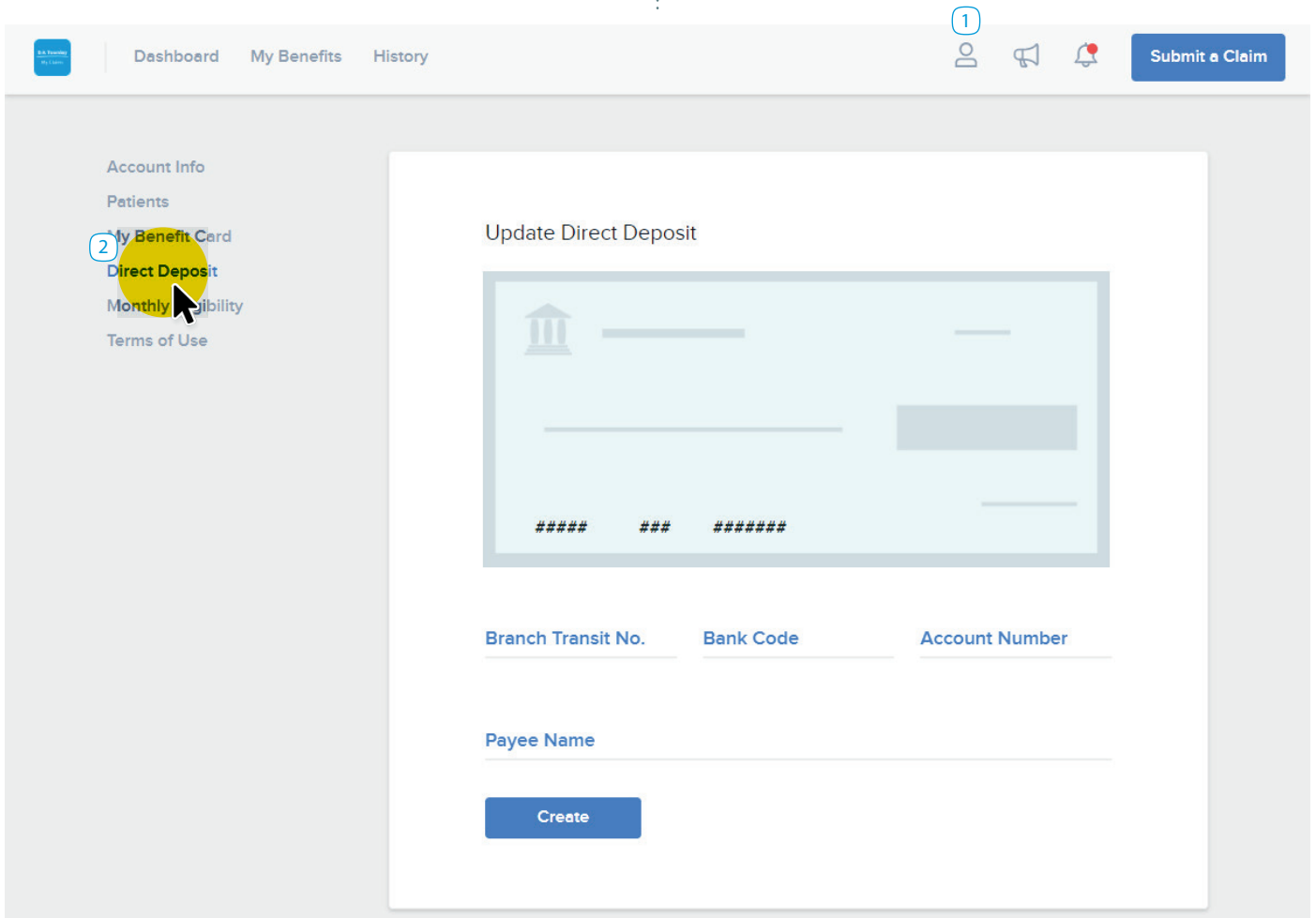
MY BENEFIT CARDS

To view a digital copy of your benefit card, click/tap the *Person* icon, and then *My Benefit Card* (6).



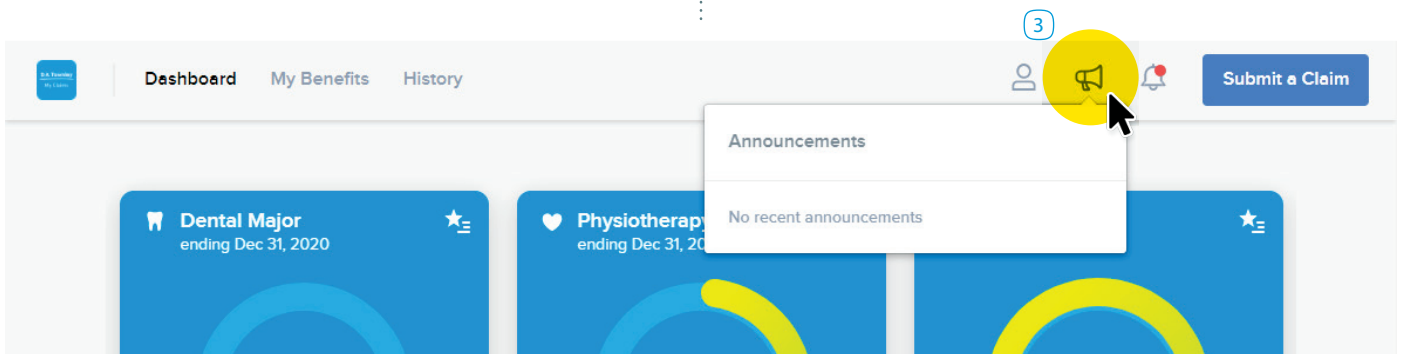
DIRECT DEPOSIT

To set up or change your banking information, click/tap the *Person* icon (1), and then *Direct Deposit* (2).



ANNOUNCEMENTS

The *Announcements* icon (3) is located on the top right side of your *Dashboard*. This is where D.A. Townley or your plan sponsor can communicate important information about your extended health and dental plan.



NOTIFICATIONS

The *Notifications* icon ¹ is located on the top right side of your *Dashboard*.

A little red dot on the bell will tell you if you have a new message about your benefits or your claims. Click/tap on it to get these messages.

The screenshot displays the MyClaims dashboard interface. At the top, there are navigation tabs for 'Dashboard', 'My Benefits', and 'History'. On the right side of the top bar, there are icons for a user profile, a bell with a red notification dot and a '1' badge, and a 'Submit a Claim' button. A dropdown menu is open from the notification bell icon, listing several notifications with dates and details. Below the navigation, there are two large blue cards for 'Dental Major' and 'Physiotherapy', each showing a donut chart of remaining amounts. The 'Dental Major' card shows \$0.00 remaining of a \$1,500.00 combined maximum. The 'Physiotherapy' card shows \$262.00 remaining of a \$500.00 procedure maximum. Below these cards are sections for 'Claim This Again' (listing Dr. Tyler Johnson, Dr. R. Scott Bell, and Dr. Jeffrey Y. Okamura) and 'Recent Claims' (listing Message Therapists, Annual/Recall Exam, and One Surface Restorations). A 'See all' link is visible on the right side of the Recent Claims section.

Notifications

- Oct 26, 2020
Claim is in review: Massage Therapists submitted on 2020-10-26 is in review.
[see details](#)
- Oct 26, 2020
Claim is in review: Massage Therapists submitted on 2020-10-26 is in review.
[see details](#)
- Oct 23, 2020
Claim has been processed for payment: Annual/Recall Exam and 4 more services submitted on 2020-10-19 has been processed for payment.
[see details](#)
- Oct 22, 2020
Claim is in review: Annual/Recall Exam submitted on 2020-10-22 is in review.
[see details](#)

Claim This Again

- Dr. Tyler Johnson
Health
- Dr. R. Scott Bell
Health
- Dr. R. Scott Bell
Dental
- Dr. Jeffrey Y. Okamura
Dental

Recent Claims

- Message Therapists
Oct 20, 2020 for Dr. Tyler Johnson
submitted \$105.00
- Message Therapists
Sep 26, 2020 for Dr. R. Scott Bell
submitted \$200.00
- Annual/Recall Exam
Oct 22, 2020 for Dr. R. Scott Bell
submitted \$3,000.00
- One Surface, Restorations, Tooth Coloured/Plasti...
Sep 30, 2020 for Dr. Jeffrey Y. Okamura
submitted \$100.00

SUBMIT A CLAIM

If you're accessing *My Claims* on a web browser, go to your *Dashboard* and click/tap the *Submit a Claim* button at the top of your screen ¹. If you're accessing it on your mobile device, tap on the plus sign at the bottom of your screen. This will bring up the claim type selection screen where you can choose to submit a Health or Drug claim. Note that online claims submissions are available for health and drug claims only.

Dental claims must be submitted manually. You can get the dental claim form from the *My Claims* portal. Simply go to the *Resources* section of the *My Benefits* tab to get the form. And, at your next visit, we encourage you to let your dentist know we now accept online claims submissions from dental offices.

The screenshot shows the 'My Claims' dashboard with a navigation bar at the top containing 'Dashboard', 'My Benefits', and 'History'. A 'Submit a Claim' button is highlighted in the top right corner with a circled '1'. Below the navigation bar are three claim status cards:

- Dental Major** (ending Dec 31, 2020): \$0.00 Remaining, \$1,500.00 Combined Maximum.
- Physiotherapy** (ending Dec 31, 2020): \$262.00 Remaining, \$500.00 Procedure Maximum.
- Chiropractor** (ending Dec 31, 2020): \$500.00 Remaining, \$500.00 Procedure Maximum.

Below the cards are sections for 'Claim This Again' (listing Dr. Tyler Johnson) and 'Recent Claims' (listing Message Therapists).

SUBMITTING A HEALTH CLAIM

To submit a Health claim, click/tap the *Health* icon ², then select who the claim is for ³.

The screenshot shows the 'Submit a Claim' modal with a 'Submit a Claim' button at the top. A dropdown menu titled 'Select a claim type' is open, showing three options: 'Health' (with a green heart icon and circled '2'), 'Drug' (with a pink pill icon), and 'Dental' (with a blue tooth icon).

The screenshot shows the 'Select a patient' dropdown menu with three options: 'William Smith' (with a yellow circle icon and circled '3'), 'Anita Smith', and 'Andrea Smith'.

You'll be directed to the claims submission screen. This is where you will enter the service or procedure you are claiming. Click/tap the *Service* field (1) and type the service you are looking for (2). Once you find it, click/tap it (3).

Health

Provider

Details

Receipt

Review

Cancel

Claim Type
Health

Service Provider
Pacific Blue Cross -
12345

Patient
Joe Smith

Please fill out the items below

1 Service

Service Date

Service Amount

Dr. Tyler Johnson -
590532300

Patient
Joe Smith

2 Service
m

3 Massage Therapists

Artificial Limbs	limb
Lumbar Support	lumbersup
Massage Therapists	massage
Medical Imaging	medimage
Monitors for respiratory dysrhythmias	monitor

If there is an annual maximum associated with this service, the Quick Balance feature will display the remaining balance (4).

Dr. Tyler Johnson -
590532300

Patient
Joe Smith

Service
Massage Therapists

Quick Balance

4 \$132.50 left

Massage Therapists

The next step is to enter the service date. Click/tap the *Service Date* field (1) to open the calendar and select the date the service was provided (2).

The screenshot shows a web application interface for a health claim. At the top, there is a blue navigation bar with the word "Health" on the left and four tabs: "Provider", "Details", "Receipt", and "Review". The "Details" tab is currently selected. A "Cancel" button is located in the top right corner of the navigation bar.

On the left side of the main content area, there is a sidebar with the following information:
Claim Type: Health
Service Provider: Dr. Tyler Johnson - 590532300
Patient: Joe Smith

The main content area is titled "Please fill out the items below". Under the "Service" section, it says "Massage Therapists". Below this, there is a table with two rows:
- "Quick Balance" (no value)
- "Massage Therapists" with a value of "\$132.50 left".

Below the table, there is a "Service Date" field. A yellow circle with the number "1" is around the field, and a mouse cursor is clicking on it. This opens a calendar widget. The calendar shows the month of "Nov" for the year "2020". The days of the week are listed as "Su", "Mo", "Tu", "We", "Th", "Fr", and "Sa". The dates are arranged in a grid. A yellow circle with the number "2" is around the date "20" (Friday, November 20th), and a mouse cursor is clicking on it.

At the bottom right of the form, there are two buttons: "Previous" and "Next".

Next, add a service amount. Click/tap the *Service Amount* field **1** to enter the dollar amount paid for the service.

Health

Provider Details Receipt Review Cancel

Claim Type
Health

Service Provider
Dr. Tyler Johnson -
590532300

Patient
Joe Smith

Please fill out the items below

Service
Massage Therapists

Quick Balance	
Massage Therapists	\$132.50 left

Service Date
2020-11-20

1 Service Amount

Double check to ensure you have entered the correct amount. At this point you can also indicate if this was the initial visit for the service you are claiming **2**.

If you have another service claim to submit, click/tap *+Add another service* **3**. If you are satisfied with the information you have entered, click/tap the *Next* button **4**.

Service Date
2020-11-20

Service Amount
\$80.00

This is an initial visit

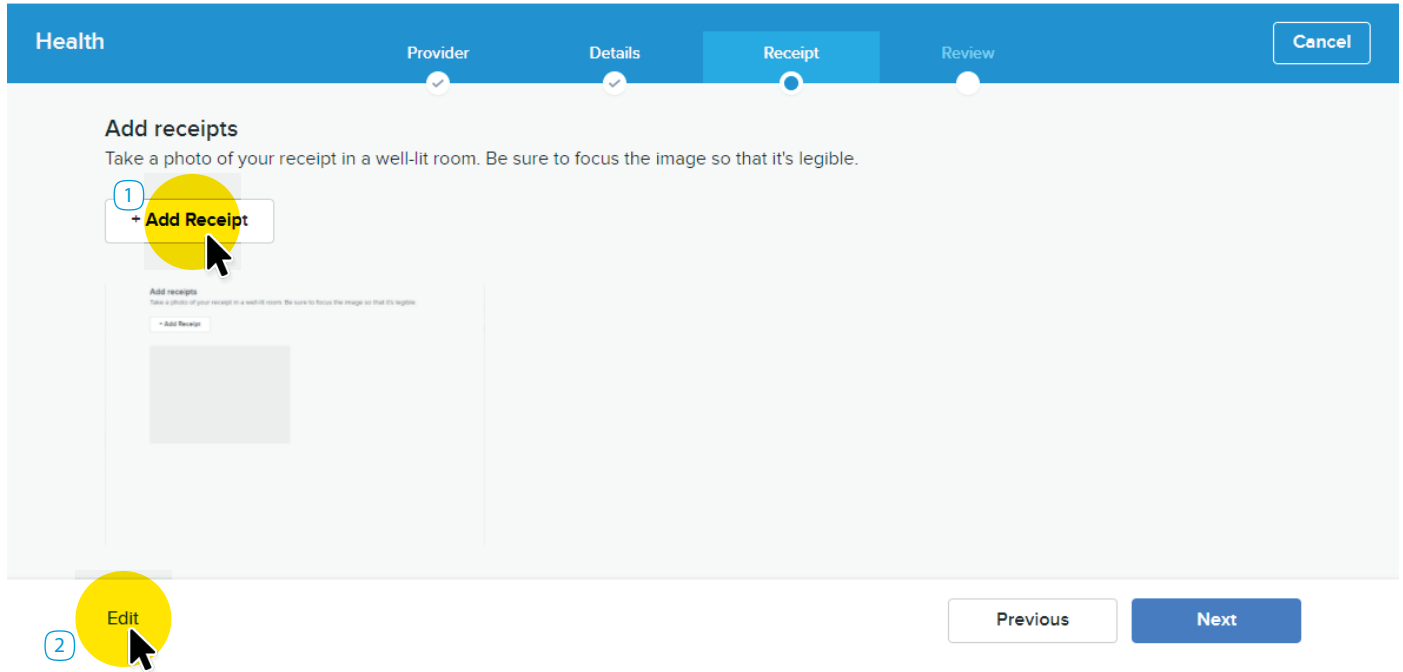
3 + Add another service

2

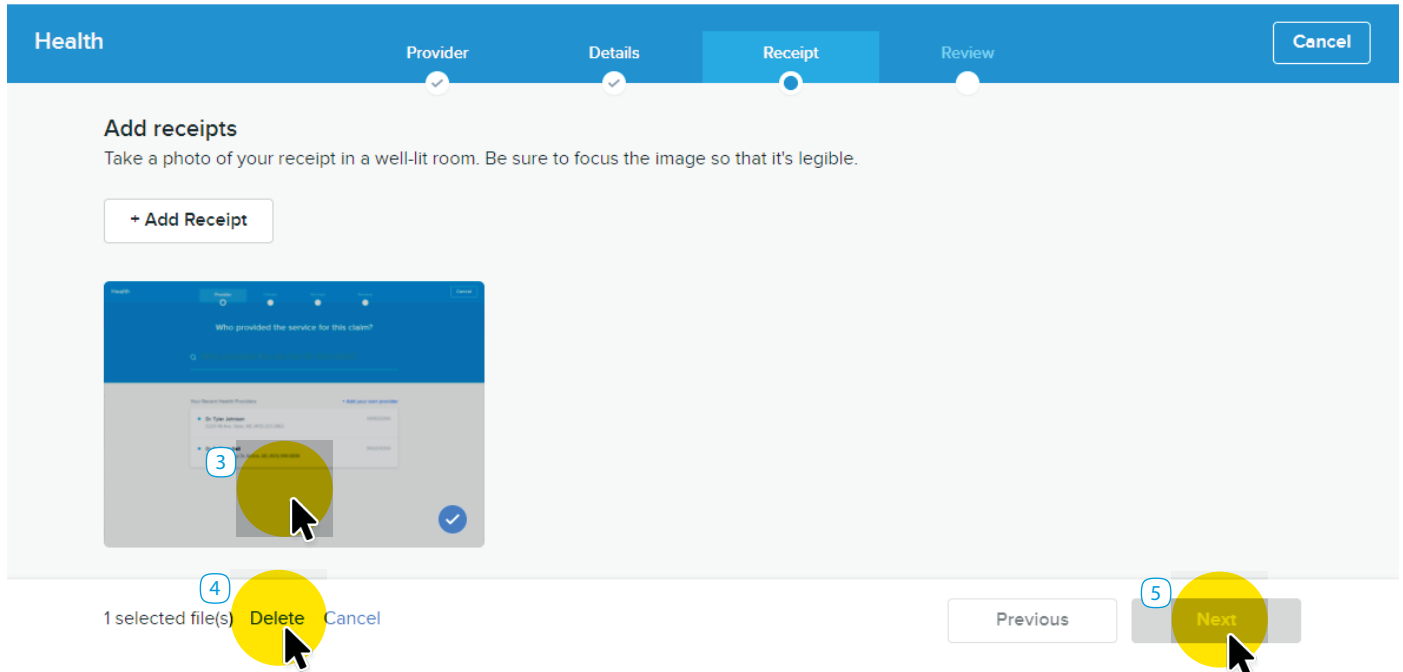
4 Next

Previous

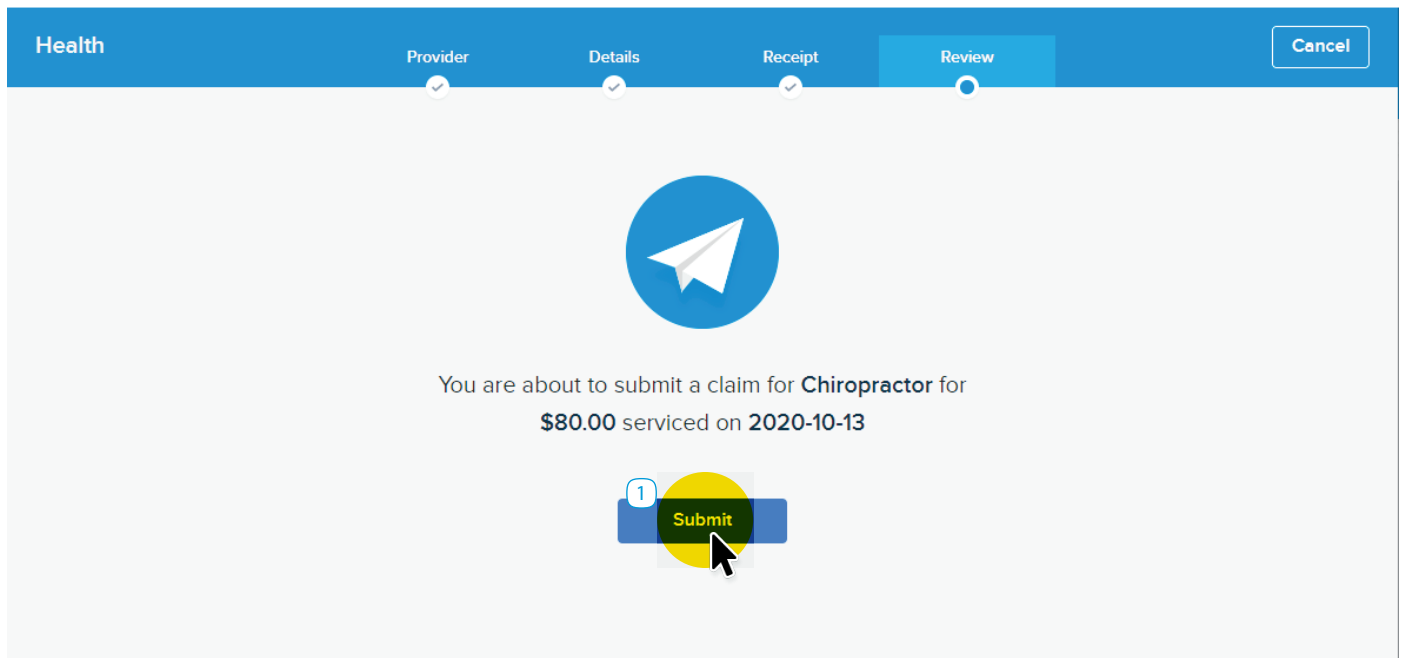
You'll now be asked to add your receipts. To do so, click/tap the *+Add Receipt* button (1). You can choose to attach a copy of a receipt that is stored on your device, or to use your smartphone or tablet to take and upload a photo of it.



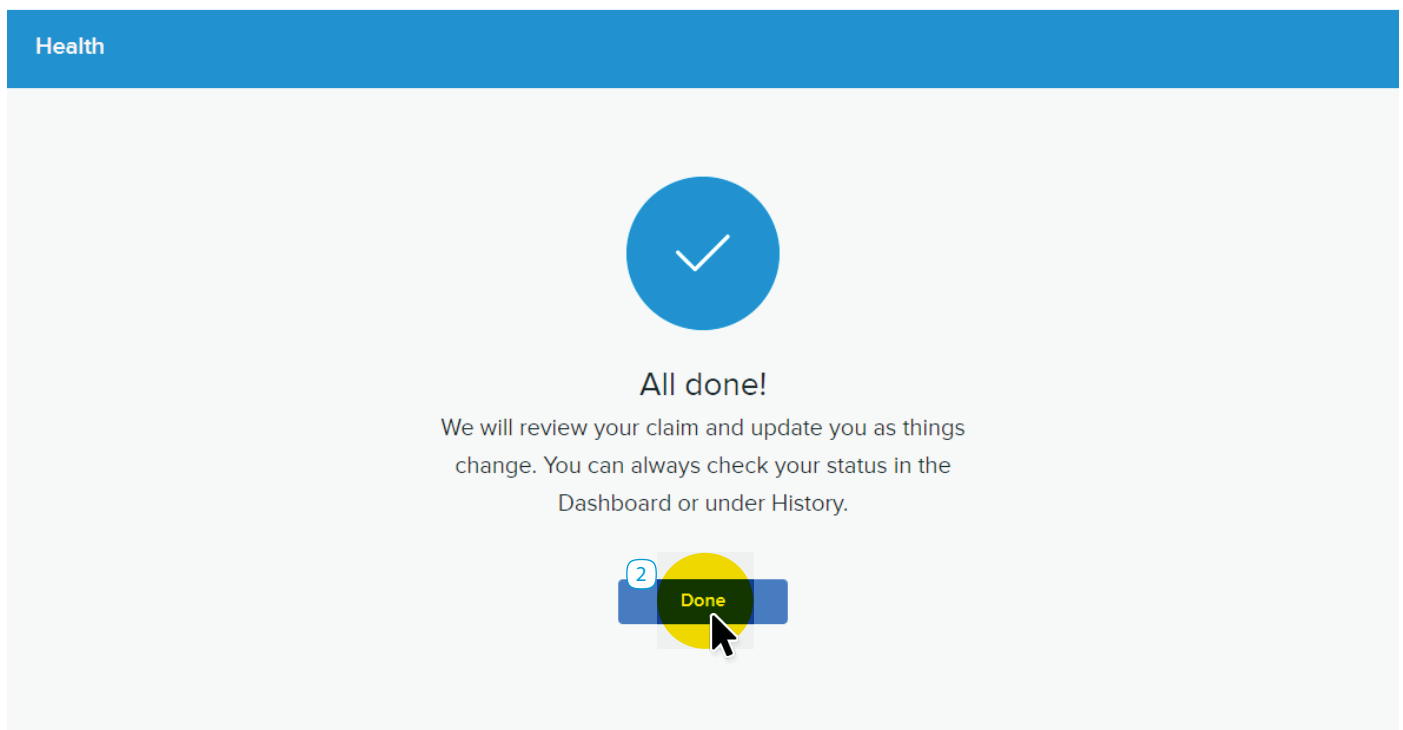
If you don't like the picture you have taken, or if you have attached the wrong file, click/tap the *Edit* button (2), select the file you wish to delete (3), and click/tap *Delete* (4). Once you are satisfied with your attached receipts, click/tap the *Next* button (5) to move on to the Review screen.



The Review screen allows you to do a final review of the claim before you submit it. If the information is correct, click/tap the *Submit* button ①.

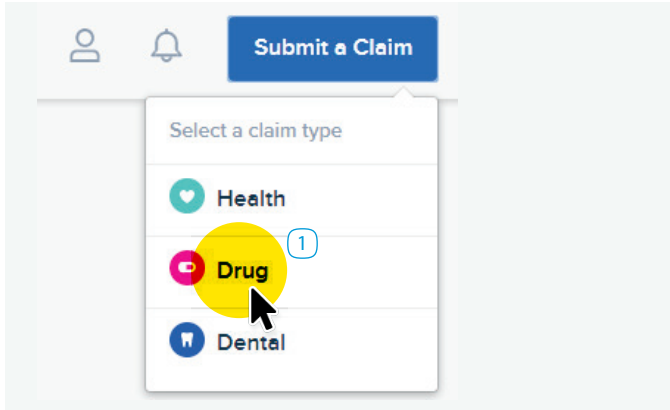


You will now see a confirmation screen advising that your claim has been successfully submitted. You will also receive a notification advising that the claim is in review. Click/tap *Done* ② to return to the *Dashboard*.



SUBMITTING A DRUG CLAIM

To submit a Drug claim, click/tap the *Drug* icon **1** and follow the instructions in the *Submitting a Health Claim* section above.



The claim details will be different than a Health claim, as you will be required to enter the following information from your prescription receipt: Drug Identification Number (DIN) **2**, Service Date **3**, Day Supply **4**, Quantity **5**, Dispensing Fee **6**, and Claim Total **7**.

A screenshot of a web application interface for submitting a drug claim. The top navigation bar is blue and contains the word "Drug" on the left, and tabs for "Provider", "Details" (which is active), "Receipt", and "Review" in the center. A "Cancel" button is on the right. On the left side, there is a sidebar with "Claim Type" set to "Drug" and "Patient" listed as "Joe Smith". The main content area is titled "Please fill out the items below" and contains seven input fields, each with a circled number and a label: **2** DIN, **3** Service Date, **4** Day Supply, **5** Quantity, **6** Dispensing Fee, and **7** Claim Total. A yellow circle with a mouse cursor is positioned over the "DIN" label.