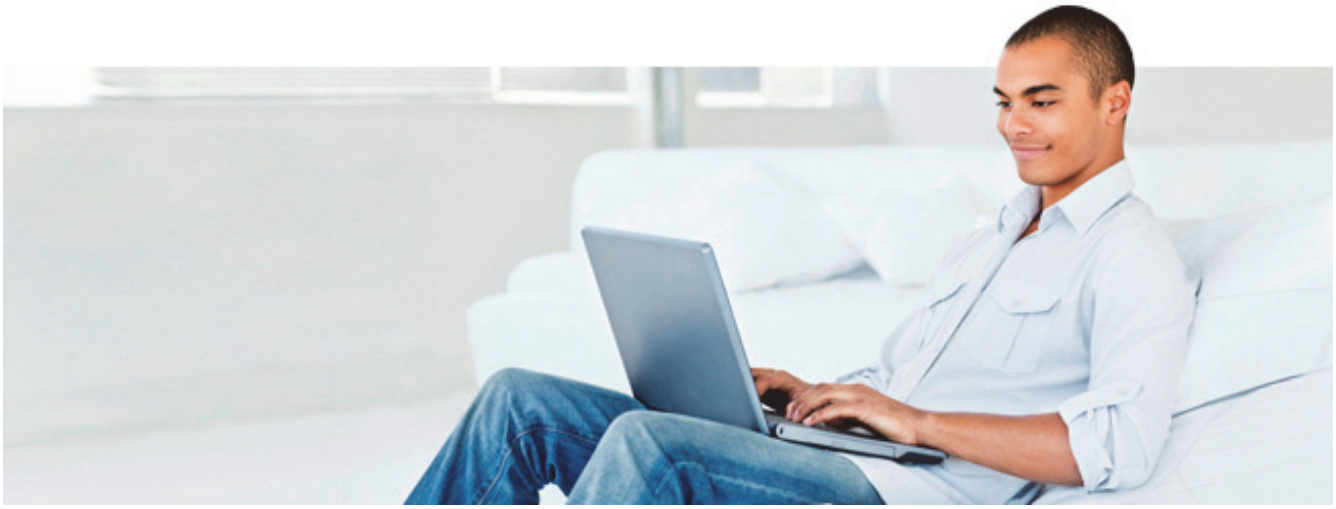
E-claims Guide



INVESTED IN YOU.

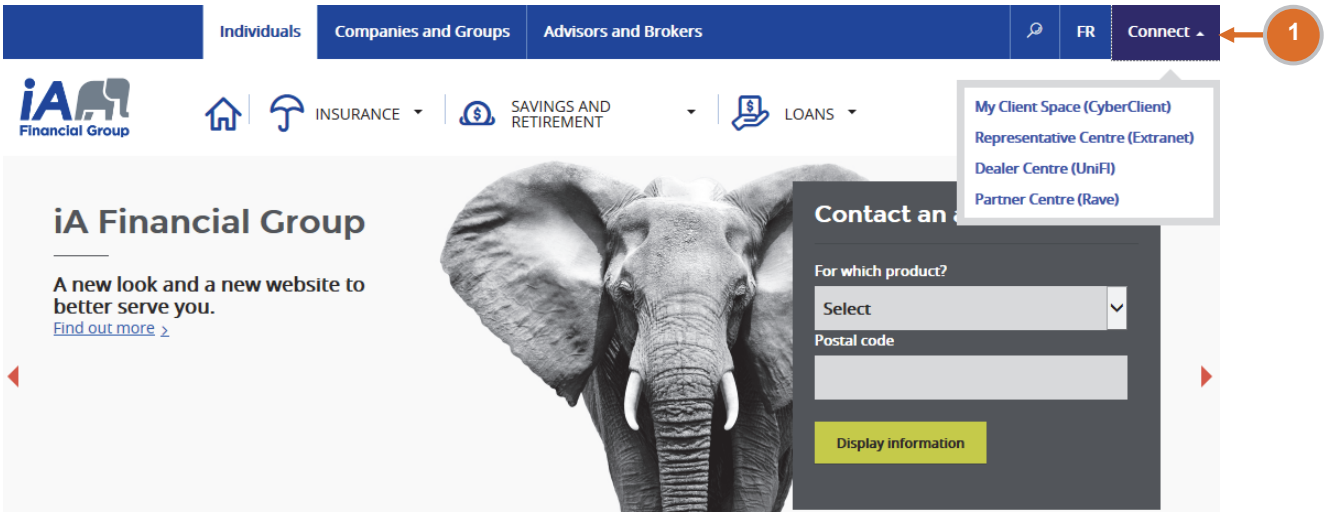
ia.ca

March 2015

iA Financial Group is a business name and trademark of Industrial Alliance Insurance and Financial Services Inc.

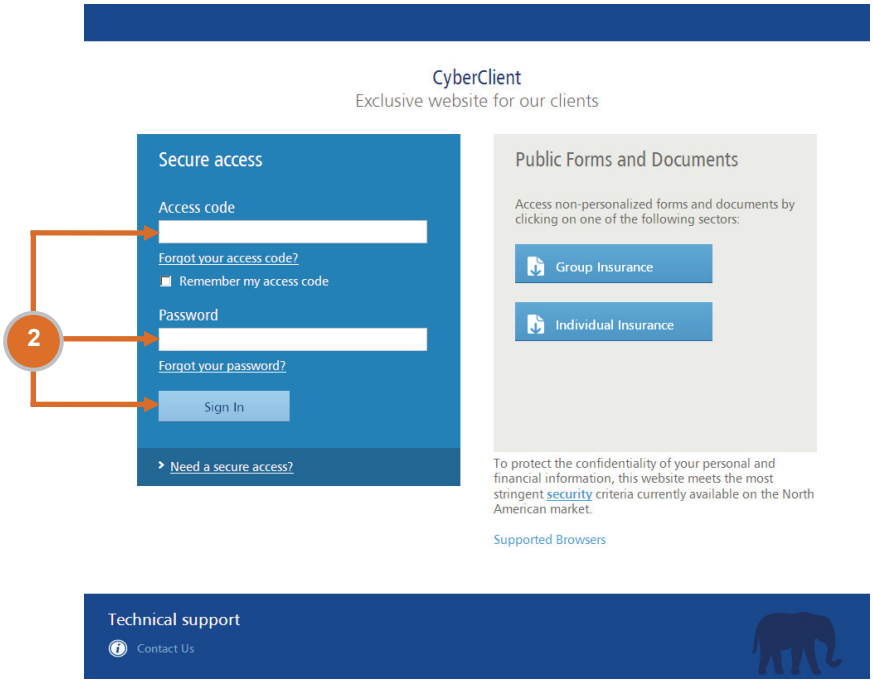
Table of Contents

Access your Group Plan



Go to our website at *ia.ca*.

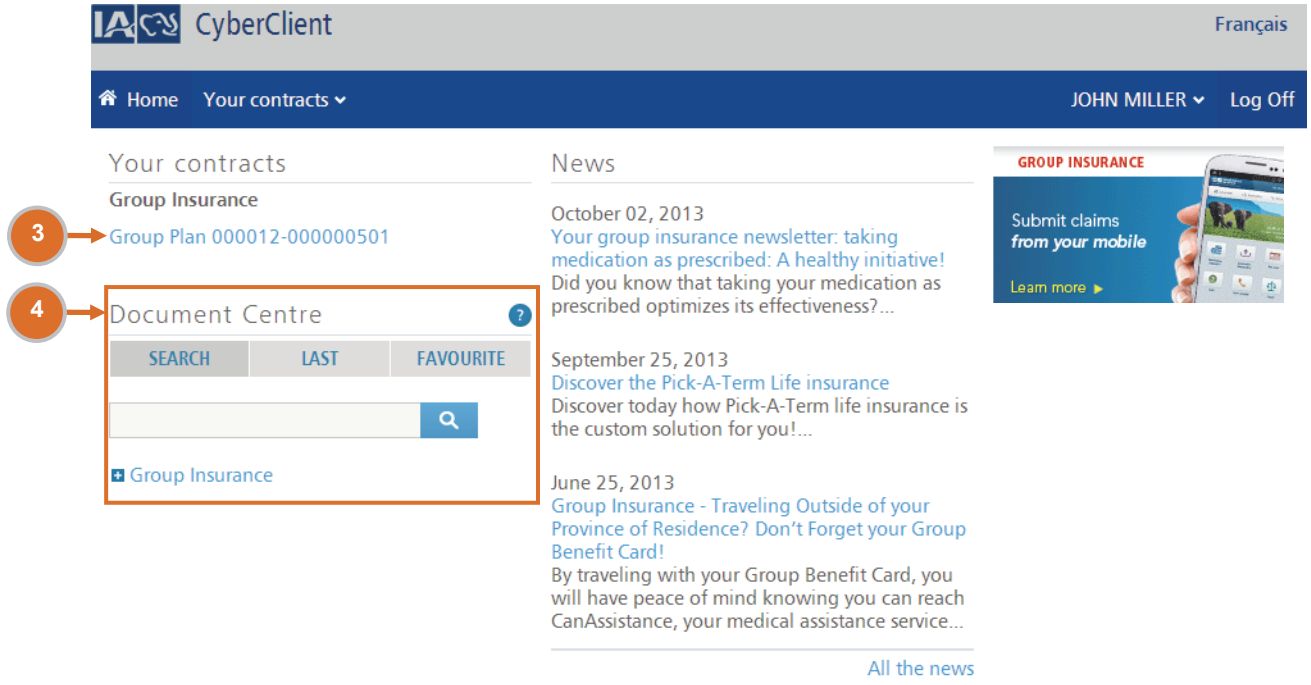
1 At the top-right corner, click on *Connect* then on *My Client Space*. The log-in page will appear on your screen (see screen below).



2 Type in your access code and password and click on *Sign In*. You will automatically be directed to the homepage (see next page).

- If you are a new plan member, you will receive a letter including an activation key to create your own access code and password.
- If you are not a new plan member and have never accessed My Client Space, click on *Need a secure access?*.
- If you do not remember your access code, click on *Forgot your access code?*, and if you do not remember your password, click on *Forgot your password?*.

Access your Group Plan (cont.)

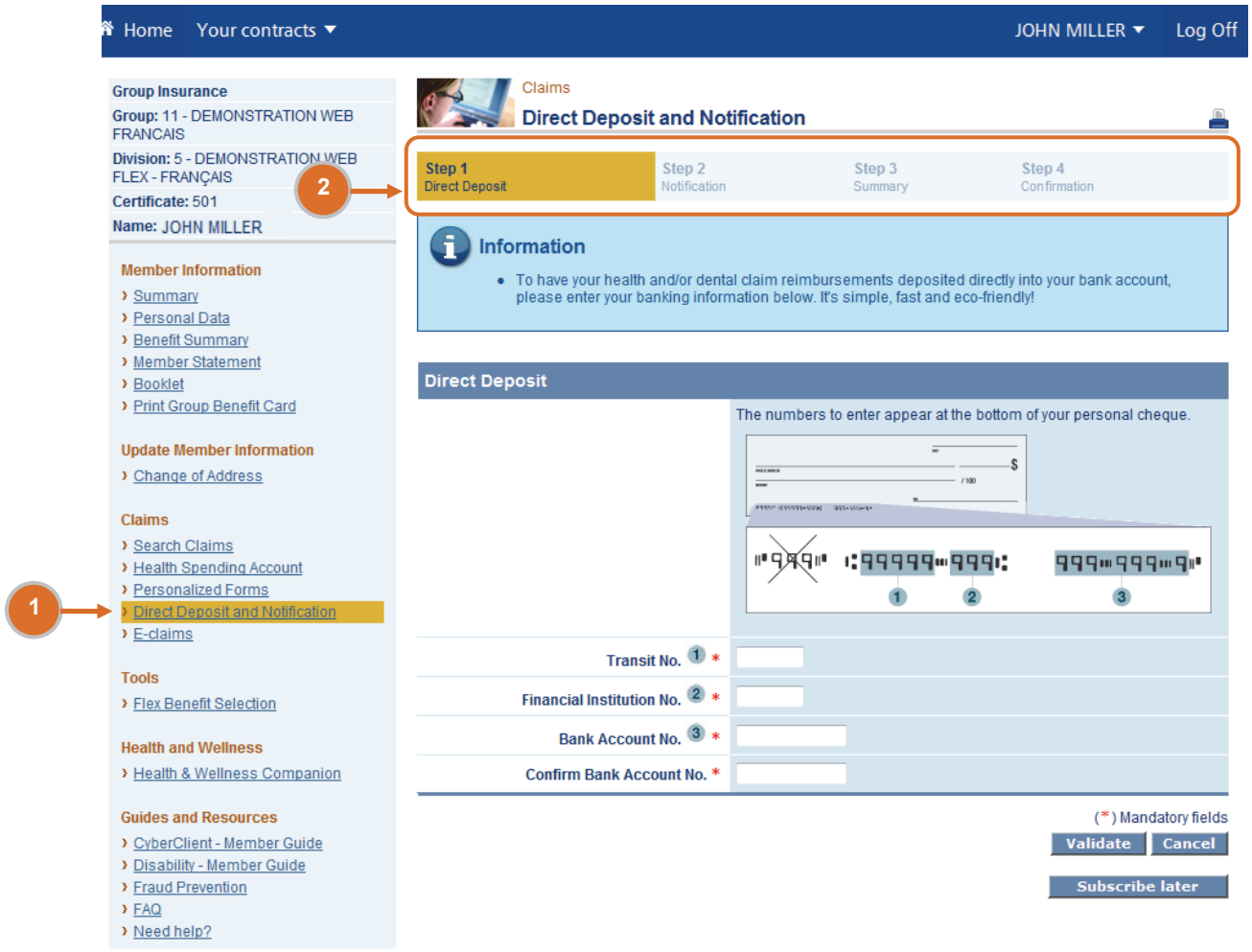


3 Under *Your Contracts*, click on your group plan to access your personal file.

4 Under *Document Centre*, you will find useful documents and information, including brochures, forms and guides.

After 30 minutes of inactivity, your *My Client Space* session will automatically expire.

Enrol in Direct Deposit and Notification to submit an E-claim



» You must first enrol in direct deposit and notification before using our E-claims service.

1. From the left-hand menu, under *Claims*, click on *Direct Deposit and Notification* to subscribe to these services for your health and dental claim payments or to update your banking information and email address.

2. Follow steps 1 to 4 to enrol in direct deposit and notification. You will receive a confirmation once you have entered the information required.

   You can return to the *Direct Deposit and Notification* page at any time to update your banking information and your email address.

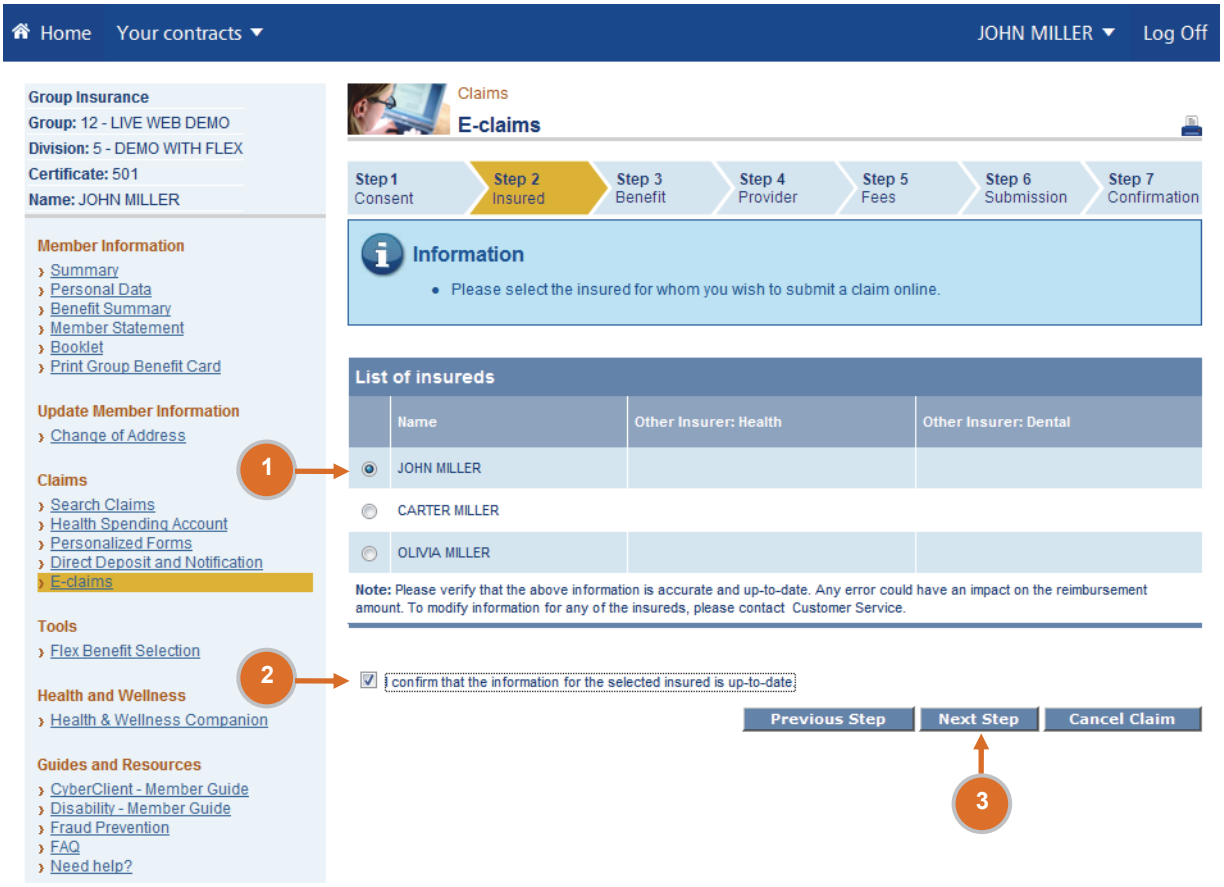
Please contact Customer Service at 1-877-422-6487 in the following cases:

- You are unable to sign up for direct deposit and notification or modify your banking information or email address through My Client Space.
- You wish to sign up for direct deposit for your disability benefits.

E-claims: Step 1 – Consent

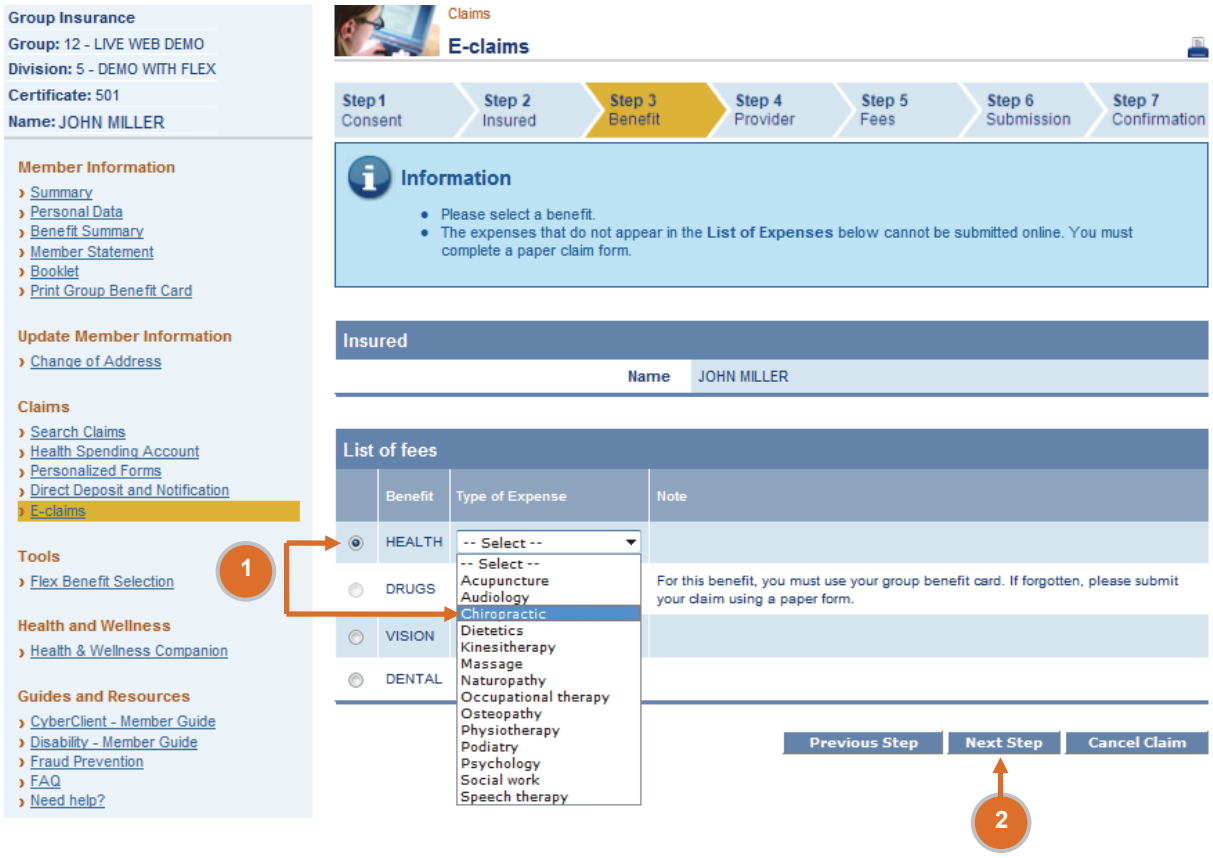
1. In the left-hand menu under *Claims*, click on *E-claims* to submit your health, drugs, vision and dental expenses online.
2. Read the *Terms and Conditions*.
3. Select *I accept*.
4. Click on *Next Step*.

E-claims: Step 2 – Insured



1. From the *List of insureds* section, select the name of the person for whom you wish to submit a claim online.
2. Check *I confirm that the information for the selected insured is up-to-date*.
3. Click on *Next Step*.

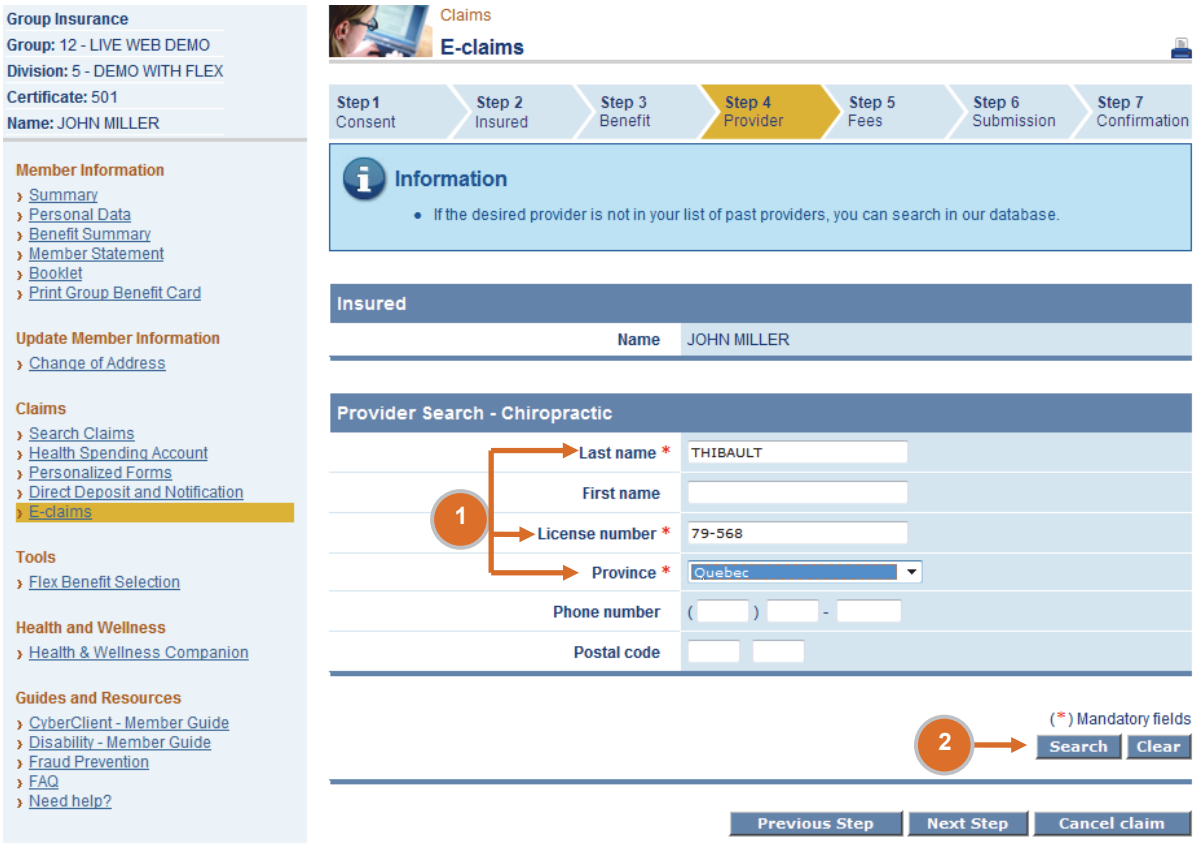
E-claims Step 3 – Benefit



1. In the *List of fees* section, under *Benefit,* select *HEALTH*, *DRUGS*, *VISION* or *DENTAL*. Then under the *Type of Expense* column, select the type of fee.
   If the expenses do not appear in the list of fees, you must complete a paper claim form.

2. Click on *Next Step*.

E-claims: Step 4 – Provider

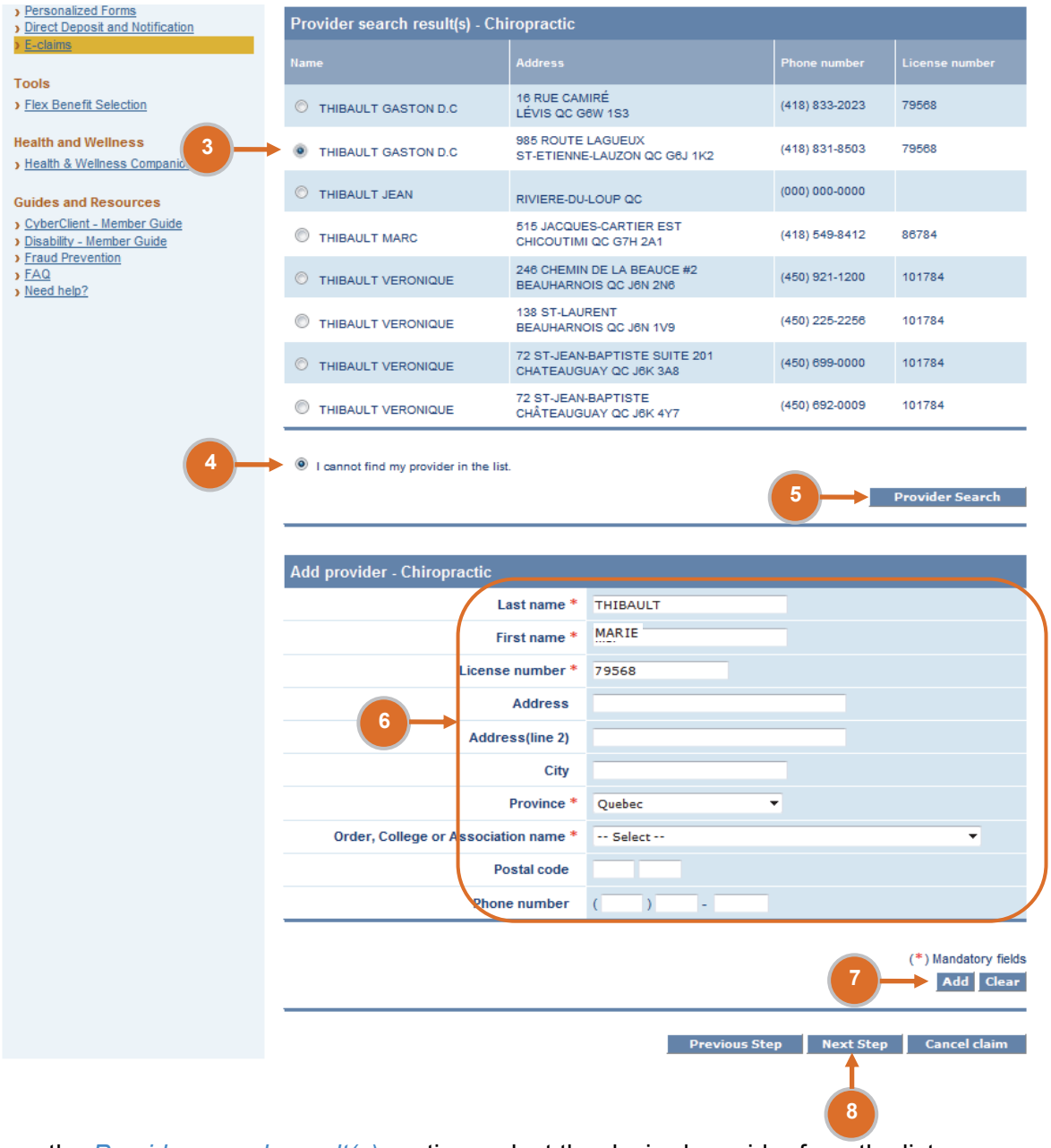


» If a list of providers from your past claims does not appear on your screen or if the desired provider does not appear in the list of providers, you may search for your provider in our database.

1. From the *Provider Search* section, enter the *Last name*, *License number* of the service provider and select the *province*.

2. Click on *Search*. A list of providers will appear on your screen.

E-claims: Step 4 – Provider (cont.)



3 From the *Provider search result(s)* section, select the desired provider from the list.
If your provider cannot be found in the list of results, you may add the provider in our database:

4 Select *I cannot find my provider in the list*.

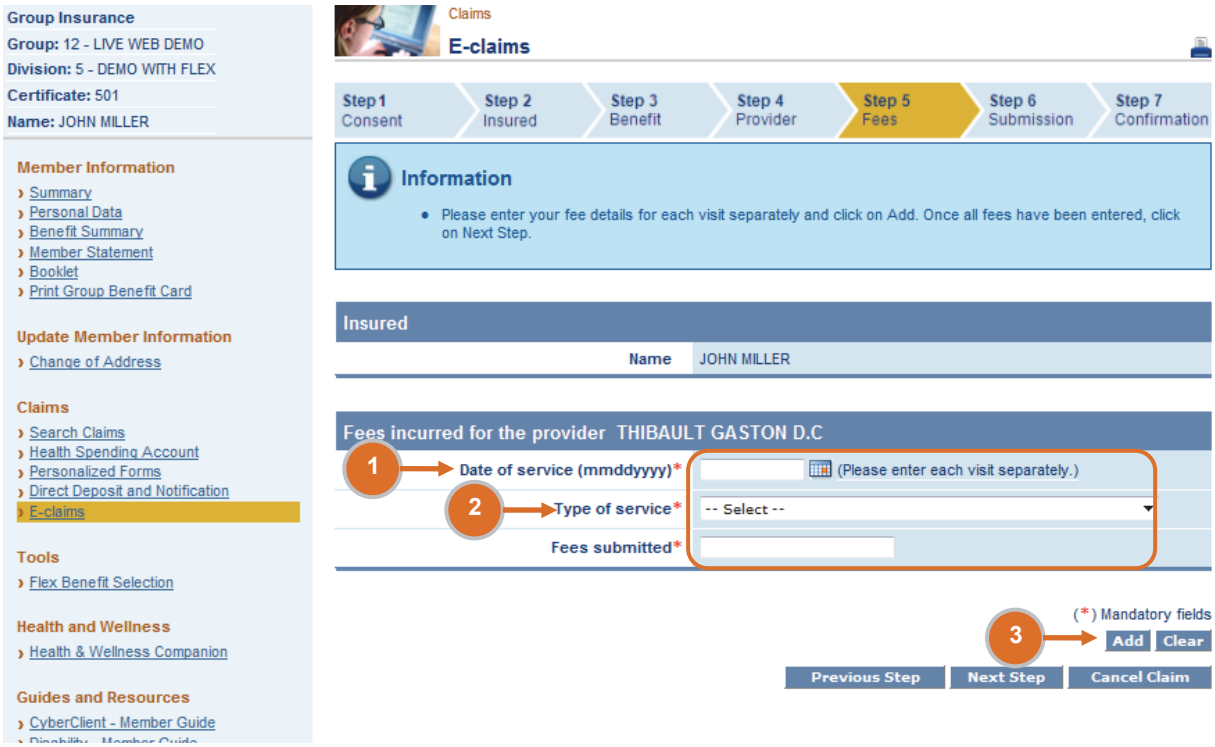
5 Click on *Provider Search*.

6 In the *Add Provider* section, enter the *Last name*, *First Name* and *License number*, then select the *Province* and *Order*, *College or Association name* of the service provider.
If the name of the Order, College or Association does not appear in the dropdown list, you must submit a paper claim.

7 Click on *Add*.

8 Click on *Next Step*.

E-claims: Step 5 – Fees



1. In the *Fees incurred for the provider* section, enter the *Date of service (mmddyyyy)*. You may click on the *calendar* to select the date.

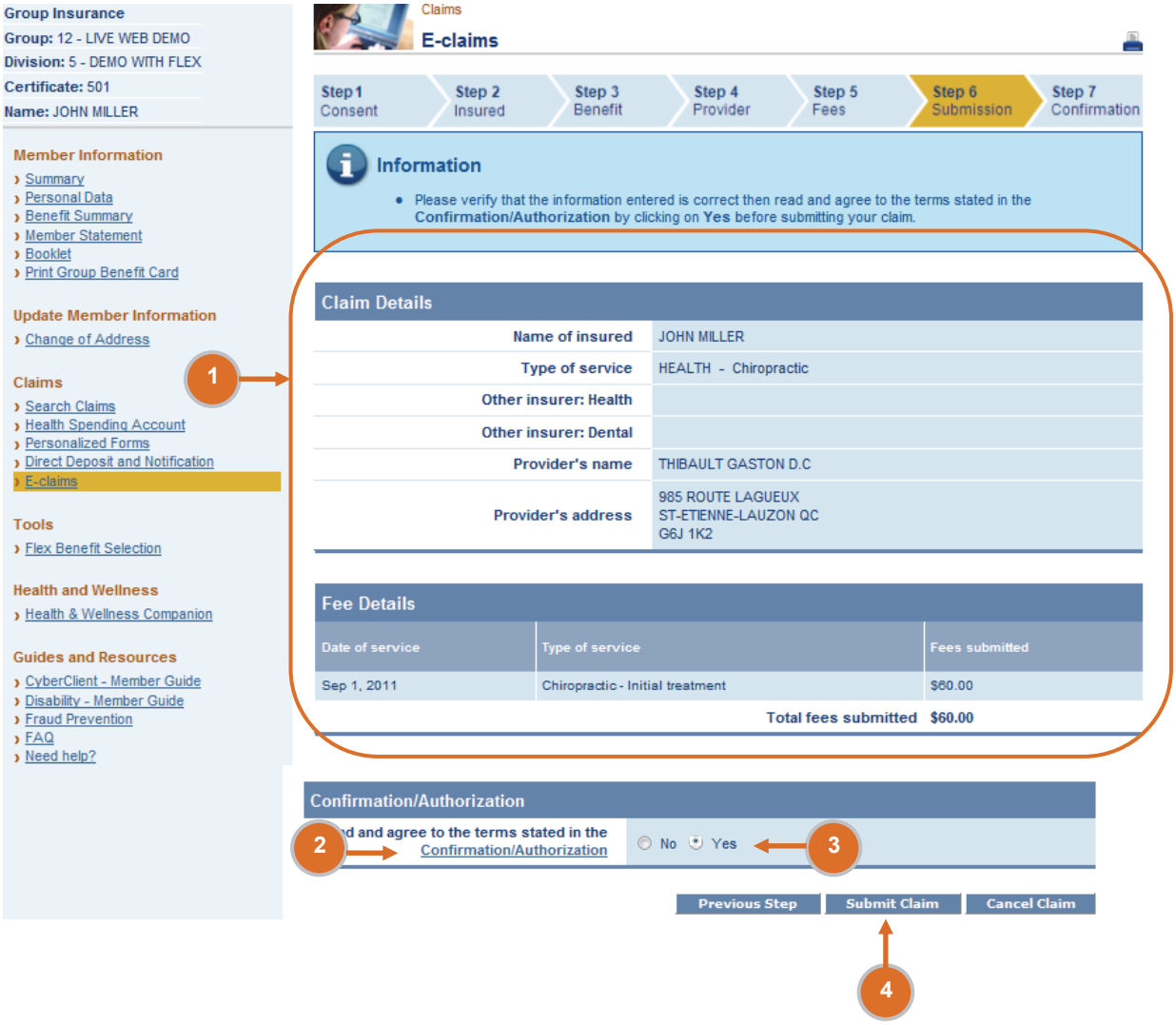
2. Select the *Type of service* and enter the *Fees submitted*.

3. Click *Add*. The *Details of fees incurred* section will appear on the bottom of your screen. See below.

4. You can view the fees you have entered. If you made an error, click on ☒ under the *Delete* column and add a new fee.

5. Click *Next Step*.

E-claims: Step 6 – Submission



1. Verify that the information entered in the sections *Claim Details* and *Fee Details* is correct.
2. Click on *Confirmation/Authorization* *and read and agree to the terms and conditions stated in this section*.
3. Click on *Yes* to accept the terms and conditions.
4. Click on *Submit Claim*.

E-claims: Step 7 – Confirmation

A confirmation message will appear.

Keep a record of your *confirmation number*.

You will soon receive a notice regarding the processing of this claim.

1 Click on *New Claim Request* to submit another claim.

2 Click on *Back to Summary* to return to the summary page.