# TAMANG SAGOT

## PhilHealth Circular No. 2017-0014

## Submission of Statement of Account (SOA) or its Equivalent for All Case Rates Claims Reimbursement (Revision 1)

1. **Why did PhilHealth revise this circular?**

   To clarify the provisions and guide all accredited health care providers with a sample template of SOA or its equivalent containing its minimum requirements required in filing of claims.

2. **What are the SOA equivalent documents?**

   The Statement of Account (SOA) or its equivalent is a document issued on the day of the patient's discharge indicating hospital charges and professional fees. The equivalent documents include but not limited to:
   a. Billing Statement
   b. Patient Account Statement
   c. Patient Bill
   d. Medical invoice

3. **Are the HCIs allowed to use their own SOA template/form?**

   PhilHealth provided a sample template of SOA or its equivalent containing its minimum requirements. The HCIs have options to adopt the template or use their own SOA form/ template as long as the minimum requirements are all stated therein.

4. **What is new in the SOA template/form?**

   The fund source and amount of discounts are included and should be declared in the SOA.

5. **What are the benefits packages exempted from SOA?**

   SOA or its equivalent shall not be required in filing of claims for the following:
   a. TB DOTS Outpatient Package
   b. Outpatient Malaria Package
   c. Outpatient HIV/ AIDS Treatment Package
   d. Z benefits

**6. Is SOA required in direct filing of claims?**

For directly filed claims, the original or certified true copy of the SOA or its equivalent shall be submitted together with the other required documents.

**7. For confinement abroad, what are the requirements needed for filing of claims?**

The following are the requirements in filing of claims of patients confined abroad:

   a. Claim Form 1, properly and completely filled out
   b. Statement of Account or its equivalent
   c. Official Receipt or any proof of payment of hospital bills and professional fees from the HCI where the patient was confined
   d. Certification from the attending physician as to the final diagnosis, period of confinement and services rendered
   e. English translations from hospital or Embassy for all documents.

- The above documents may be original or certified true copy.
- Certification as true copy of the photocopy of the above documents shall be done by the PhilHealth member.
- The certified true copy of documents may be scanned for submission to PhilHealth via email.
- Claims with incomplete/inconsistent documents shall be returned to the sender.
- If warranted, the original or certified true copy of documents shall be required to submit thru package mail.
- The SOA or its equivalent stating some of the minimum requirements (e.g. name of the patient, name of hospital, date of confinement, actual hospital charges, professional fees, and any authorized HCI representative with signature) shall be acceptable.

**8. When is the effectivity of this circular?**

The new provisions of this circular shall be effective for all claims with admission dates starting October 1, 2017. The minimum requirements of SOA shall be incorporated in the filing of claims otherwise, the claims shall be returned to the sender.