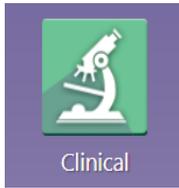




Training Manual

Humint O Lite
Version 16

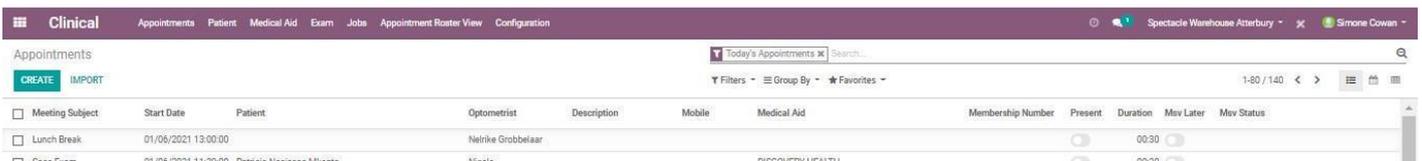
Clinical



The Clinical app is where the test details for the patient are logged, invoiced, submitted to medical aid, and placed in the orders queue.

This module will be discussed in detail as well as every category within.

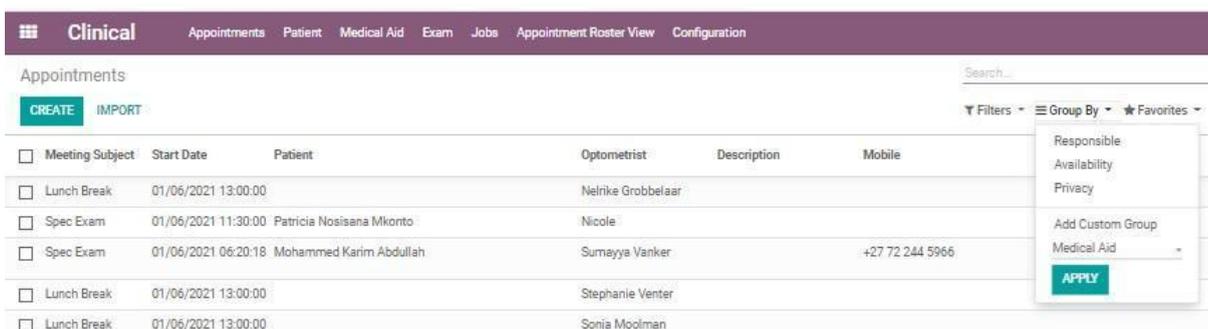
- When you CLICK on the CLINICAL button, the Appointment book will open.
- It will show that day's appointments as per the automated filter. You can, however, remove the filter by clicking on the X next to (Today's Appointments), Then it will display all appointments.



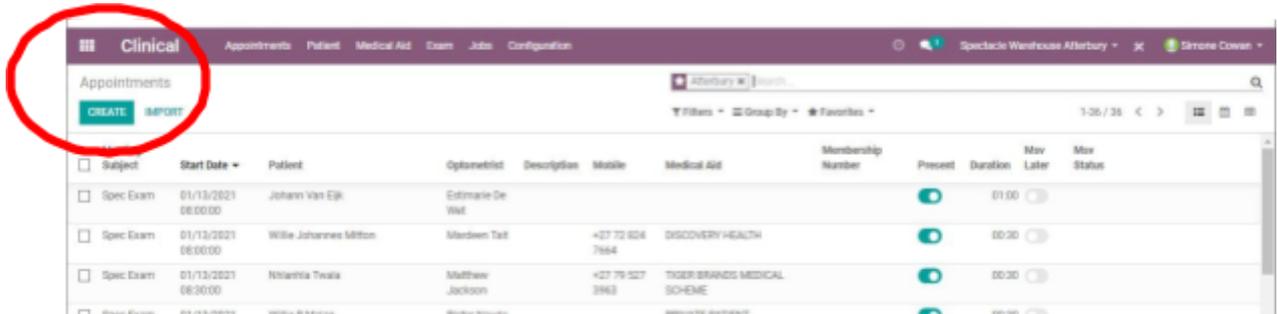
- Creating your own filter by clicking on "filter"



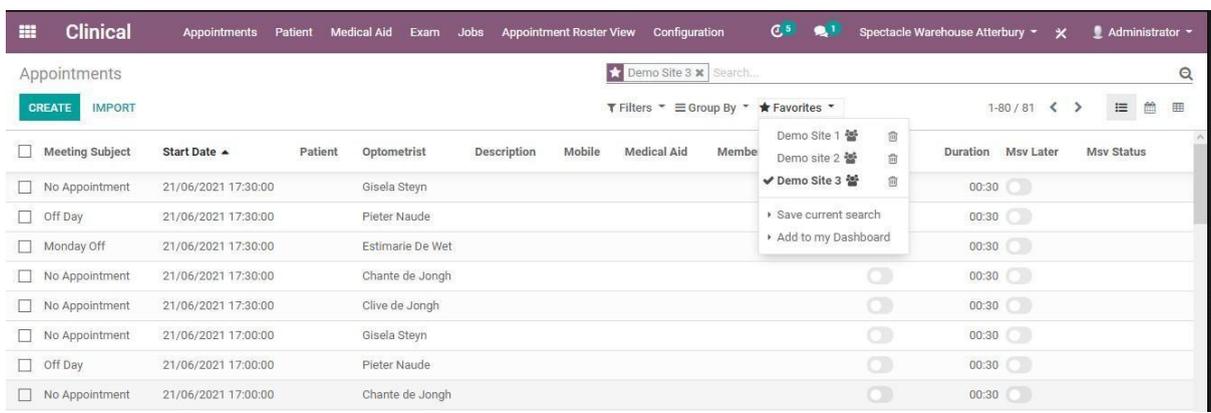
- You can either choose today's appointments, or online appointments, or you can create a custom filter.
- Grouping can also be used here for display. EG. Grouping per Optom, Appointments made by specific staff, Appointments of specific Optoms.



- If you have multiple branches, you can add them to your favourites to sort out the branches individually

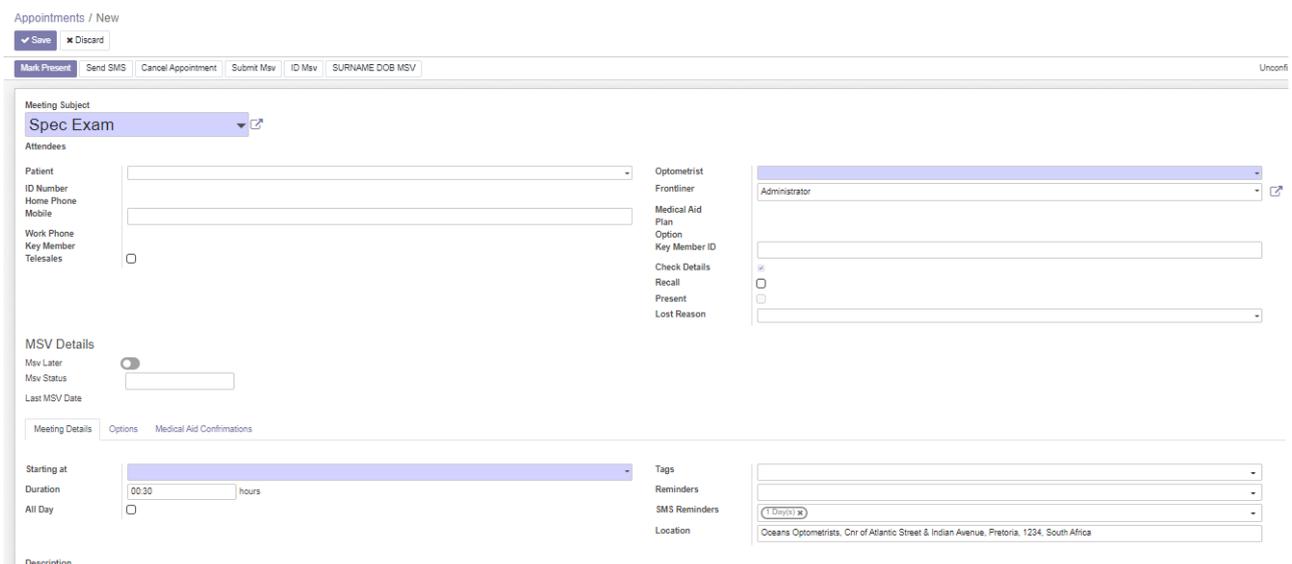


You can also sort the different fields according to their categories by clicking on the "Heading", you can sort it from 1st to the last Appointment according to time and date.



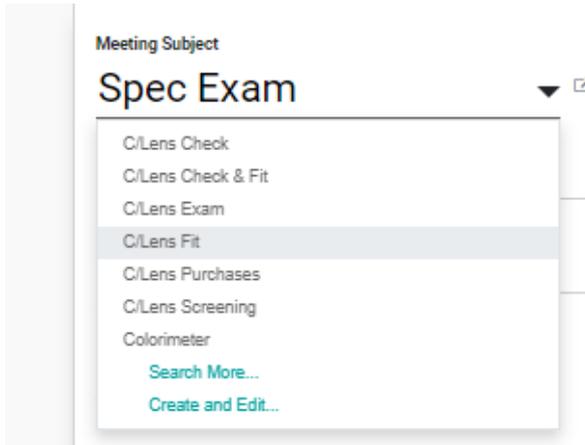
Creating an Appointment

- You can also create an appointment here by clicking on the CREATE button TOP LEFT. It will open onto this screen



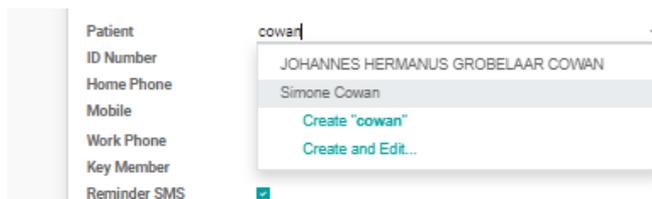
Meeting Subject

- This is the type of Appointment.
- Spec Exam, C/L Exam, and any other type of consultation
- You can create Subjects as you go along or pre-load
- All of the options won't be listed. If you don't see it in the dropdown list, you can "Search more" to find it.

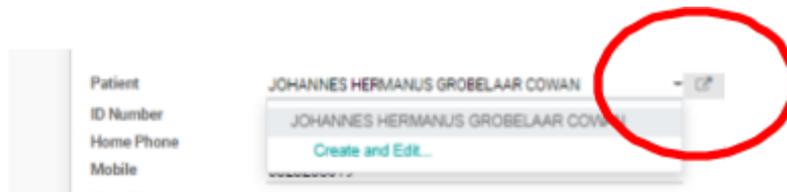


Patient

- Depending on what you have chosen, you can either select your existing patient or create a new patient.
- You can type in the name or surname, and HUMINT will list the patients. It will once again not list all of the patients with that description, you can search more to find.



You can Edit your patient's details here



When you open the Edit button, you will get to this screen:

Open: Patient

SUBMIT MSV | ID MSV | SURNAME DOB MSV

0 Opportun... | 0 Meetings | \$ 0 Sales | 0 Subscript... | R 223.28 Due | R 0.00 Invoiced | Customer Ledger | More -

Individual | Company

JOHANNES HERMANUS GROBELAAR COWAN

Account Details

Account Number: SWAV33739
 Patient Number: SWAV33739-1
 Medical Aid: -
 Plan: -
 Option: -
 Medical Aid No: -
 Dependent Code: 00
 Employer: DISCHEM
 Occupation: -

MSV Details

MSV Later:
 MSV Status: -
 Latest MSV Date: -

Personal Details

Title: -
 Surname: COWAN
 Initials: JHC
 First Name: JOHANNES HERMANUS GROBELAAR
 Nickname: HERMAN
 ID Number: S704305236084

Communication

File No: 0
 Old System No: SWAV33739-1

Postal Address

GLENFIELDS 22
 MANITOBASTRAAT
 FAERIE GLEN Province - 81
 South Africa -
 Destination Code: -

Job Description

e.g. Sales Director -
 Work Phone: -
 Phone: -
 Mobile: 0828283619
 Email: -
 Website: e.g. https://www.odoo.com

SAVE | DISCARD

- The account number will appear
- Patient number will be the account number with – 1 / 2, which will indicate the main members and dependants on the account.
- Medical aid, Plan, and Option to be added
- Occupation created and then listed.
- MSV - This is the MediSwitch integration and customer detail verification button.
- Old system number – If patients are imported from another system, or captured from an old manual Px card
- Postal Address
- Personal details
- You can add titles, then select from the

- ID number is very important as this is the unique field detecting duplicates.
- The birthday will Autofill when ID is entered
- Language
- Gender
- Job description can also be created and then chosen from a list view
- Contact details

The other info can be entered.

Contacts | Internal Notes | Sales & Purchases | Accounting | Addresses | Hello Who Are You? | Hello Who Are You?

ADD A DEPENDENT | ADD EXISTING PATIENT

Contacts

- Add a dependant
- Add an existing patient – Here, you can add an existing patient as a dependant on this account.

Internal Notes

- Here you can put a warning on an account e.g., Must pay in full before collection
- This warning will pop up when dispensers open a sales order for this patient as a reminder

Sales and Purchases

- Here the patients will be marked as customers and suppliers will be marked as vendors.
- You should also select the payment terms here
 - Patient to pay
 - Medical aid to pay

Accounting

- Here you can enter your receivable and payable accounts
- You can also add banking details for a vendor or customer in case of a refund.

Contacts	Internal Notes	Sales & Purchases	Accounting	Addresses	Hello Who Are You?
----------	----------------	-------------------	------------	-----------	--------------------

Bank Accounts

Bank	Account Number
Add a line	

Accounting Entries

Account Receivable	101200 Account Receivable	<input type="checkbox"/>
Account Payable	8200/001 Account Payable	<input type="checkbox"/>

Addresses

- You can copy the home address from the postal address if you choose to do so.
- Work address can be entered here

Contacts	Internal Notes	Sales & Purchases	Accounting	Addresses	Hello Who Are You?	Hello Who Are You?
----------	----------------	-------------------	------------	-----------	--------------------	--------------------

Sport

Do You Play Sport: _____

Hobbies

Do You have a hobby: _____

Does Your Occupation Involve?

Does your: _____

Do You...

Do You: _____

Contacts	Internal Notes	Sales & Purchases	Accounting	Addresses	Hello Who Are You?	Hello Who Are You?
----------	----------------	-------------------	------------	-----------	--------------------	--------------------

Sport and Hobbies

Do You Play Sport: _____

Do You have a hobby: _____

Do You

Do You: _____

Does Your Occupation Involve?

Does your: _____

Hello Who Are You?

- Here you can enter more specific details about the patient. These reports can come in handy with future marketing e.g., Sport-specific eyewear

Once you have selected your patient and entered all patient details, you can go back to the main Appointment and select your Optometrist.

Bottom left is 2 reminder fields.

1. Reminders - This field is for the User IE the Optom to send them a reminder of the appointment.
2. SMS Reminders - This you can set up to send reminders to your patients about the appointment. This is customizable.

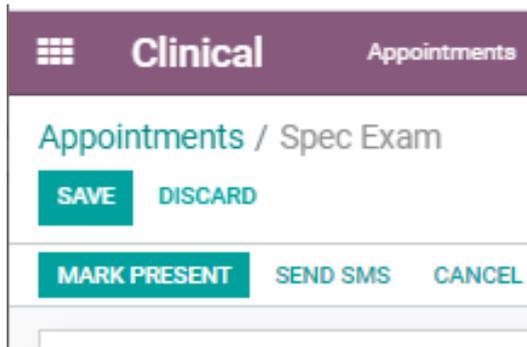
By default, the reminder sms will be sent one day before the Appointment. The SMS function will be set up once the system is live.

Meeting Details

Meeting details are to set your appointment for a specific time and date.

- Starting at – Choose your date and time
- Duration – Will be set for half an hour (00:30) by default, however, any duration can be set by adjusting the duration field
- All Day – If you tick all-day – It will block the entire day.
- Tags – This is for reporting purposes. Tags can be used to generate reports at any time.
- Reminders – Here you can choose multiple reminders for your patient.

- **Click on SAVE**, then your Appointment will be scheduled.



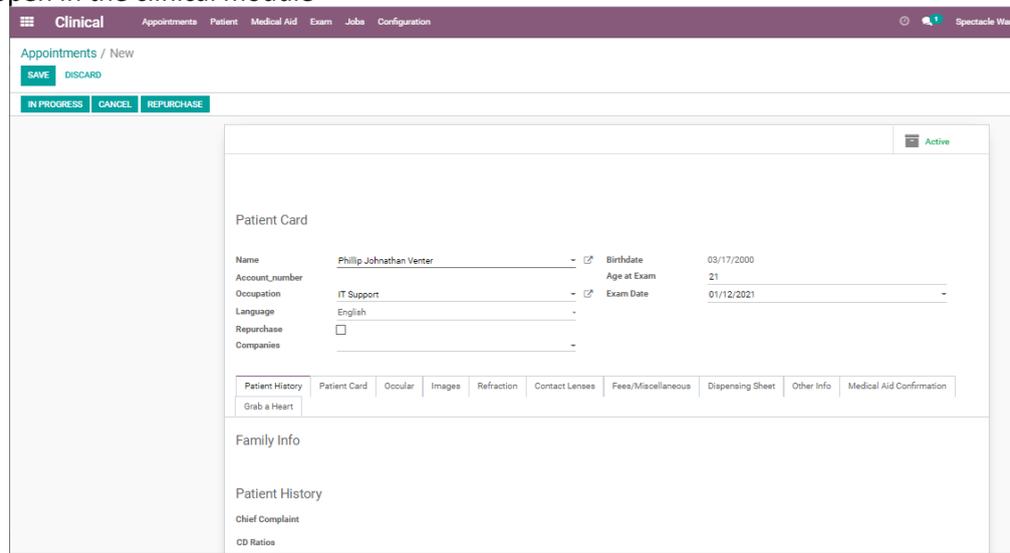
Marking a patient present

Click on the Icon under present next to the patients' name, and it will reflect the present and give you the option to start the examination. The "Present" switch will allow the User to pull a report for patients that did not show, allowing the User to follow up and reschedule the Appointment.



Examination

- By clicking on START EXAMINATION on the appointment book, the examination screens will open in the clinical module



- Click on – IN PROGRESS - This will change the status of the Appointment from NEW to In Progress.

Clinical | Appointments | Patient | Medical

Appointments / New

SAVE DISCARD

IN PROGRESS CANCEL REPURCHASE

Patient card

Patient Card

Name	Phillip Johnathan Venter	Birthdate	03/17/2000
Account_number		Age at Exam	21
Occupation	IT Support	Exam Date	01/12/2021
Language	English		
Repurchase	<input type="checkbox"/>		
Companies			

- The patient card will contain the information of the patient as well as the details of the exam
- Name – Patient name
- Account number – Account number assigned to the patient
- Occupation – As entered in patient information
- Language – As entered in patient information
- Repurchase – Use when doing a remake and want to copy previous exam details
- Companies – If linked to a company
- Birthdate - As entered in patient information
- Age at the examination – Pulled from birthdate
- Exam date – Today's date

Patient History

Patient History	Patient Card	Occular	Images	Refraction	Contact Lenses	Fees/Miscellaneous	Dispensing Sheet	Other Info	Medical Aid Confirmation
-----------------	--------------	---------	--------	------------	----------------	--------------------	------------------	------------	--------------------------

Grab a Heart

Family Info

Patient History

Chief Complaint

OD Ratios

Posterior Notes

IOL Notes

This you will not be able to edit. It will be pulled through from previous exams.

Patient Card

Enter the Health, Chief Complaints and Specific Visual Requirements here.

Patient History	Patient Card	Ocular	Images	Refraction	Contact Lenses	Fees/Miscellaneous	Dispensing Sheet	Other Info	Medical Aid Confirmation
Grab a Heart									

Account No. _____ Chief Complaints _____

Health _____ Specific Visual Requirements _____

Ocular

Patient History	Patient Card	Ocular	Images	Refraction	Contact Lenses	Fees/Miscellaneous	Dis
Grab a Heart							

Pressures

Blood Pressure _____

OD OS

Tonometry _____ *

Pupil Reflex

Equal

Round COPY CHECK BOX

Consensual

Direct

NPC _____

Anterior Notes _____

Fundus

CD Ratios 0.0 _____ * 0.0 _____ *

Posterior Notes _____

IOL

Clear

NS COPY CHECK BOX

Capoular

IOL Notes _____

- Pressures: Blood Pressure entered here
- Tonometry OD and OS pressures entered here
- Pupil Reflex Tick the correct option here
- NPC
- Anterior Notes: Enter here online
- FUNDUS

CD Ratios Posterior Notes

- IOL:

Choose the correct option here.
IOL Notes – Enter notes on the line provided.

Images

Here your FUNDUS Images can be saved to the patient file from any make or model of camera. You can also add your OCT or Topography scans here.

Patient History	Patient Card	Ocular	Images	Refraction	Contact Lenses	Fees/Miscellaneous	Dispensing Sheet	Other Info	Medical Aid Confirmation
Grab a Heart									

Fundus

Fundus OD _____ Fundus OS _____

ADD ADD

If you click on ADD, **you** can add an image from your computer.

Refraction

Patient History	Patient Card	Ocular	Images	Refraction	Contact Lenses	Fees/Miscellaneous	Dispensing Sheet	Other Info	Medical Aid Confirmation
---------------------------------	------------------------------	------------------------	------------------------	----------------------------	--------------------------------	------------------------------------	----------------------------------	----------------------------	--

Grab a Heart

	OD Unaided		OS Unaided
Visual Acuity			
	Aided		Aided
Visual Acuity			
PD	Distance 0.00		Near 0.00

REFRESH

Habitual

Name	Date	Sph	Cyl	Axis	Prism	Add	VA	Sph	Cyl	Axis	Prism	Add	VA
Add a line													

Test

Name	Sph	Cyl	Axis	Prism	Add	VA	Sph	Cyl	Axis	Prism	Add	VA
Auto	0.00	0.00	0		0.00	0.00	0.00	0.00	0		0.00	0.00
Ret	0.00	0.00	0		0.00	0.00	0.00	0.00	0		0.00	0.00
Subjective	0.00	0.00	0		0.00	0.00	0.00	0.00	0		0.00	0.00

- Visual Acuity – Unaided – Aided (OD and OS enter here)
- PD – Distance and Near PD to enter here
- Habitual - This is the final subjective RX pulled through from the previous examination
- Test –
 - Auto – Your Auto refraction
 - Ret – Retinopathy
 - Subjective – Your final subjective RX for the patient

Clinical Notes

Phorias	Horizontal	Vertical
Distance		
Near		
14B	0.00	

Final RX

Name	Sph	Cyl	Axis	Prism	Add	VA	Sph	Cyl	Axis	Prism	Add	VA	Dispense
Add a line													

Refractive Notes

Clinical Notes

- Phorias – Horizontal, and Vertical entered here
- FINAL RX – Add a line to copy Subjective and finalise the script for the job.
- Many final Rx's can be created depending on the spectacles prescribed by the Optometrist.
- You can choose the ones you want to dispense by clicking on the button under the dispense column.
- Refractive Notes – Add notes on the line provided.

Final RX

Name	Sph	Cyl	Axis	Prism	Add	VA	Sph	Cyl	Axis	Prism	Add	VA	Dispense
Bifocals	+0.75	+1.00	80		+1.00		+0.75	+1.00	125		+1.00		<input type="checkbox"/>
SV Distance	+0.75	+1.00	80		0.00		+0.75	+1.00	125		0.00		<input checked="" type="checkbox"/>
Sunnies	+0.75	+1.00	80		0.00		+0.75	+1.00	125		0.00		<input checked="" type="checkbox"/>
Readers	+1.75	+1.00	80		0.00		+1.75	+1.00	125		0.00		<input checked="" type="checkbox"/>

[Add a line](#)

Refractive Notes

The screenshot shows the 'Clinical' section with a sub-header 'Appointments / SWFG(ex)-2395'. Below this are 'SAVE' and 'DISCARD' buttons. A 'REFRESH' button is circled in red.

Either press (REFRESH), or (SAVE and EDIT) for the script that you have just entered to be pulled through for dispensing.

Contact Lenses

The screenshot shows the 'Contact Lenses' tab selected in a navigation menu. Below the menu are 'REFRESH' and 'Grab a Habit' buttons. The main content area is divided into three sections: 'Habitual', 'Test', and 'Final RX', each with a table of prescription data.

Habitual

Name	Date	Sph	Cyl	Axis	Add	VA	Sph	Cyl	Axis	Add	VA
Add a line											

Test

Name	Sph	Cyl	Axis	Add	VA	Sph	Cyl	Axis	Add	VA
Subjective	+0.75	+1.00	80	+1.00	0.00	+0.75	+1.00	125	+1.00	0.00

Final RX

Name	Sph	Cyl	Axis	Add	VA	Sph	Cyl	Axis	Add	VA	Dispense
Add a line											

The subjective line from your eye examination will copy into the TEST, Subjective line.

- Habitual - This will reflect if there were previous C/L dispensing or tests saved on the patient's account.
- Test – Subjective line copied
- FINAL RX – The subjective line here copies from the Spec Exam Subjective. In the CL Exam, you can change it to the script that you want to dispense.

	R	L
Diameter	<input type="text"/>	<input type="text"/>
Base Curve	<input type="text"/>	<input type="text"/>
Over Refraction	<input type="text"/>	<input type="text"/>
Axis Orientation	<input type="text"/>	<input type="text"/>
Movement	<input type="text"/>	<input type="text"/>
Sag	<input type="text"/>	<input type="text"/>
Landing Zone	<input type="text"/>	<input type="text"/>
Multi-focal Add	<input type="text"/>	<input type="text"/>
Contact Lens Solution	<input type="text"/>	<input type="text"/>
Eye Drops	<input type="text"/>	<input type="text"/>
Schedule	<input type="text"/>	<input type="text"/>
Valid	<input type="text"/>	<input type="text"/>

Notes	Notes
<input type="text"/>	<input type="text"/>

- You can also add multiple scripts here e.g., SV or Multifocal
- Notes - Split per eye. You can add any additional notes about the eye health, lens fitting and multifocal add power specifications, solutions, drops and validity.

Fees/Miscellaneous

- You can add your eye test here as well as invoice Miscellaneous items such as drops and solutions.
- Individual frame purchases can also be done here

Patient History	Patient Card	Occular	Images	Refraction	Contact Lenses	Fees/Miscellaneous	Dispensing Sheet	Other Info	Medical Aid Confirmation
-----------------	--------------	---------	--------	------------	----------------	--------------------	------------------	------------	--------------------------

Product	Description	ICD10	Quantity	Unit Price	Taxes	Discount (%)	Subtotal	Total	Currency
[11001] Optometric Examination	[11001] Optometric Examination	201.0	1.000	590.00	Sales Tax 15.00%	0.00	R 513.04	R 590.00	ZAR
[13830] Complete Revitalens	[13830] Complete Revitalens 240	-	1.000	140.00	Sales Tax 15.00%	0.00	R 121.74	R 140.00	ZAR

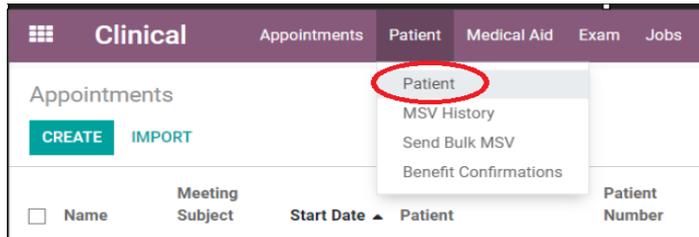
Msv's / DISCOVERY HEALTH MED

Msv

<p>Membership Details</p> <p>Partner: Elizabeth M Greeff</p> <p>Membership Number: 051996740</p> <p>Current Membership number: 051996740</p> <p>Validation Status: Valid</p> <p>Responding Party:</p> <p>Current ID number: 4804080113088</p> <p>Medical Aid: DISCOVERY HEALTH MED</p> <p>Plan: Classic Comprehensiv</p> <p>Option: Classic Comprehensiv</p>	<p>Response Details</p> <p>Validation Status: Switch out to Medical Scheme</p> <p>Disclaimer: FOR 20210113: NO DISCLAIMER</p> <p>Result Description: Claim Validation Fields: MEMBER BIRTHDATE, MEMBERSHIP NUMBER</p>
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Members

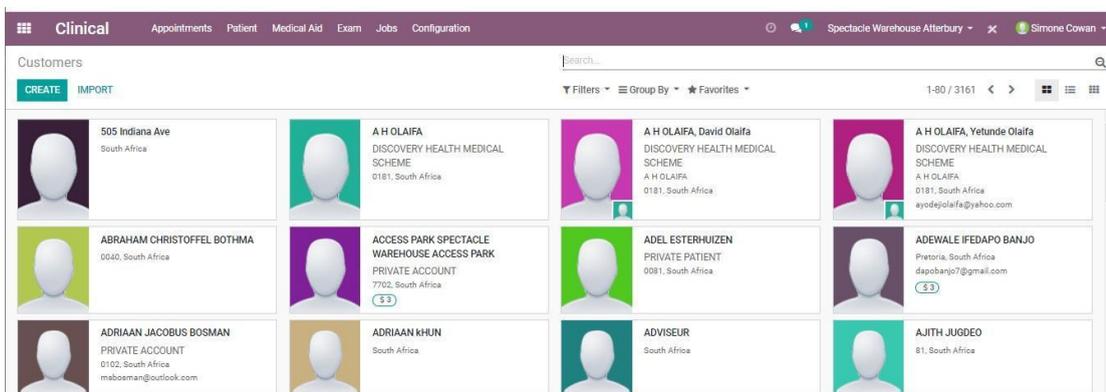
Name	Surname	Dependant Code	Initials	DOB	Id/Passport Number	Gender	Effective Date	Termination Date	status Code Description
JOHANNES	GREEFF	0	JP	03/11/1950	5003115126087	M	05/01/2000		The membership is valid and active



Within the clinical module, there is an option to add a patient’s medical aid history and confirmations.

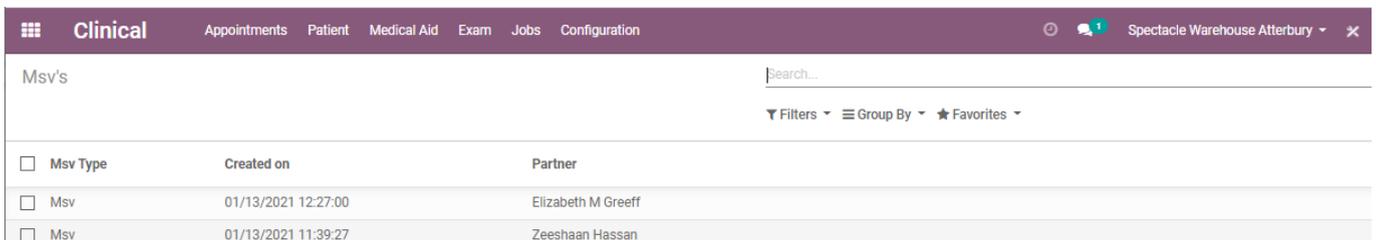
Patient

- This will take you to the CONTACTS module.
- To view the full guidelines of this module, go to the CONTACTS manual.



MSV History

- This will indicate the MSV validations that were done.



- If you click on the specific history of the validation, it will take you to the validation page, where it shows the status and dependants with medical aid information.
- It will indicate in the status code description – If the membership is valid and active or not.

Send Bulk MSV

- This will send MSV for the patient selected on the contact to MSV Later.

