



Training Manual

Humint O Lite
Version 16

Exam

This option helps you to explore and better manage your exams.

Current exams

- This will show the exams that are currently taking place.
- The STATE of the patient will either be New OR In-progress

Clinical									
Examination									
<div> <div>CREATE</div> <div>IMPORT</div> </div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div> <div>1-24 / 24</div>									
<input type="checkbox"/> Name	Exam #	Account No.	Exam Date	Repurchase	Birthdate	Age at Exam	Occupation	Language	State
<input type="checkbox"/> Paul Michiel Bester	SWFG(ex)-2481	SWAV101194	01/13/2021	<input type="checkbox"/>		0		English	New
<input type="checkbox"/> Marina Maian	SWFG(ex)-2455	SWFG-002782	01/13/2021	<input type="checkbox"/>	11/01/1960	61		English	In Progress

- It is important for the dispenser/front liner to mark the exam as **DONE**, otherwise it will remain in this category even after it has been invoiced.
- Once the exam is marked **DONE**, you cannot generate an invoice on that exam. You will either have to open a new exam OR Repurchase the current exam.
- You can also open the exam from here and EDIT the exam.
- (This is where the dispensers will find the exam to commence dispensing once the Optometrist has handed over and saved the test part)

Previous Exam

- This is where you can view previous exams and dispensing.
- All of these exams were marked as **DONE**
- You can use the search bar to find a specific patient.
- You can also use custom filters to view specific dates, Optoms, dispensers, and so on.

E.g.: You want to see the number of patients that a specific Optometrist tested on a specific date. You will use the undermentioned filter.

Clinical									
Examination									
<div> <div>CREATE</div> <div>IMPORT</div> </div> <div> <div>Exam Date is equal to '01/12/2021'</div> <div>Optometrist is equal to 'Chante Roets'</div> </div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div>									
<input type="checkbox"/> Name	Exam #	Account No.	Exam Date	Repurchase	Birthdate	Age at Exam	Occupation		
<input type="checkbox"/> Johann Grobelaar	SWFG(ex)-2408	SWFG-002684	01/12/2021	<input type="checkbox"/>	01/18/1946	75			
<input type="checkbox"/> Janique Pearl Pillay	SWFG(ex)-2370	SWFG-002678	01/12/2021	<input type="checkbox"/>	04/13/1984	37			
<input type="checkbox"/> Elma Burger	SWFG(ex)-2430	SWFG-002766	01/12/2021	<input type="checkbox"/>		0			
<input type="checkbox"/> Greta Burger	SWFG(ex)-2373	SWFG-002679	01/12/2021	<input type="checkbox"/>	11/08/1953	68			
<input type="checkbox"/> Noeleen Maroun	SWFG(ex)-2446	SWFG-002784	01/12/2021	<input type="checkbox"/>	10/23/1978	43			

Invoices

List of invoices created. This list view can be used to manage and report on invoices.

You can also see which invoices are in DRAFT and still need to be either submitted to medical aid OR validated.

The **status** will show:

- DRAFT – Still needs to be sent to medical aid or validated
- OPEN – Payment needed
- PAID – Invoiced and paid
- **Switch-On Navigator**

Invoices												
<div> <div>CREATE</div> <div>IMPORT</div> </div> <div> <div>Search...</div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div> <div>1-80 / 3051</div> </div>												
<input type="checkbox"/>	Customer	Invoice Date	Number	Company	Salesperson	Due Date	Source Document	Claim Level Status	Tax Excluded	Tax	Total	Amount Due Status
<input type="checkbox"/>	Marthinus Jacobus Piek	01/13/2021		Spectacle Warehouse Atterbury	Chantel Smit				R 3,930.44	R 589.56	R 4,520.00	R 0.00 Draft
<input type="checkbox"/>	Celliers Inggs	01/13/2021	INV/2021/0600	Spectacle Warehouse Atterbury	Anuscha Olivier	01/20/2021		Claim Approved for Payment	R 1,008.69	R 151.31	R 1,160.00	R 0.00 Paid
<input type="checkbox"/>	Riani De Kock	01/13/2021		Spectacle Warehouse Atterbury	Alex Janse van Nieuwenhuizen				R 8,234.82	R 1,235.18	R 9,470.00	R 0.00 Draft

SwitchOn Navigator									
<div> <div>CREATE</div> <div>IMPORT</div> </div> <div> <div>Search...</div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div> <div>1-80 / 694</div> </div>									
<input type="checkbox"/>	First Name	Surname	Individual Internal Ref	Service Date	Medical Aid	Total	SW Ref Number	status	Response Message
<input type="checkbox"/>	Justin Tobias	Koppeschaar	SWFG-002796	01/13/2021	DISCOVERY HEALTH	587.20	0-3-f14818d000	Claim Approved for Payment	
<input type="checkbox"/>	Hendrik Jakobus	Bruwer	SWFG-002778	01/13/2021	CAMAF	7,952.00	0-3-f147fd8001	Claim Accepted for delivery	
<input type="checkbox"/>	Elizabeth Maria	Greeff	SWFG-002789	01/13/2021	DISCOVERY HEALTH	8,741.00	0-3-f147f99002	Claim Approved for Payment	
<input type="checkbox"/>	Francois	Grobler	SWFG-002609	01/13/2021	DISCOVERY HEALTH	4,262.20	0-3-f147c9c801	Claim Approved for Payment	

This is a quick overview of the submitted claims and the results.

The status of the claim will be displayed as well as any issues with submission.

Claim accepted for delivery does not mean that the claim has been approved for payment.

You can also click on the claim for more information