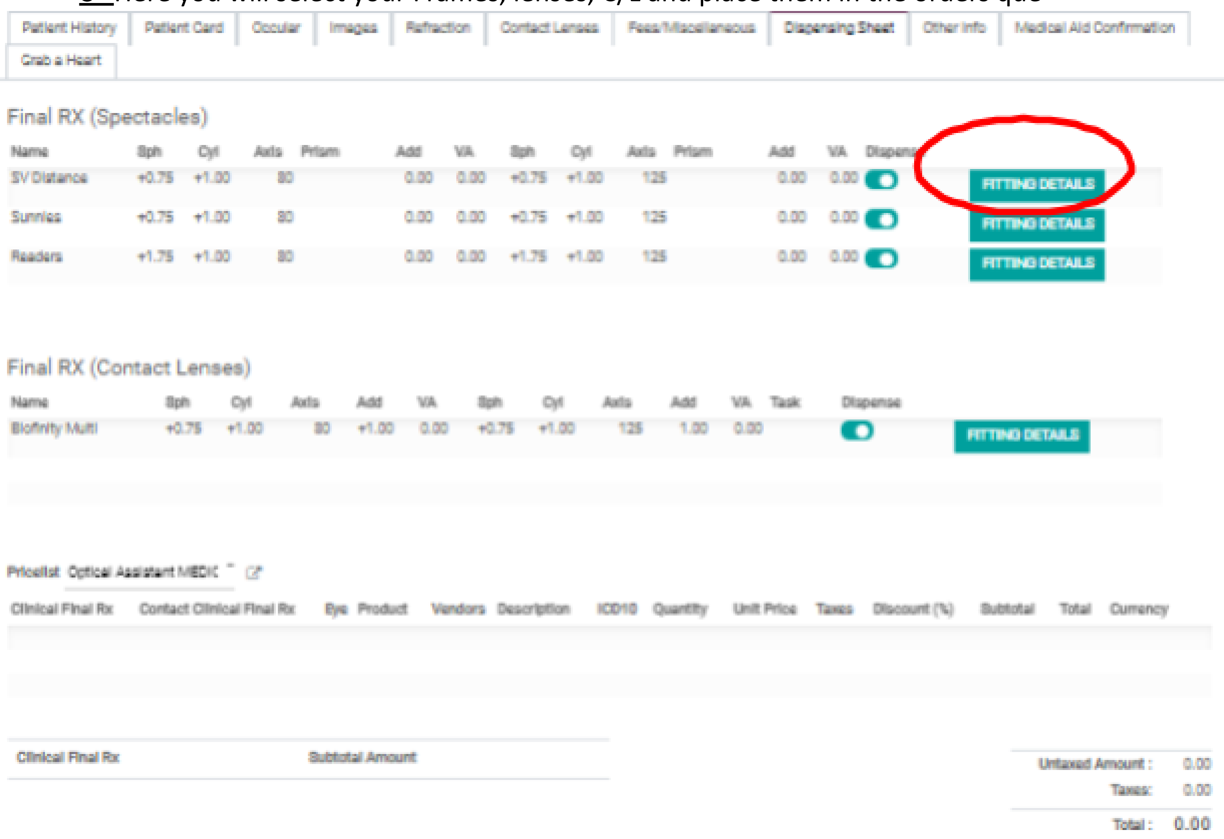
Training Manual

Humint O Lite

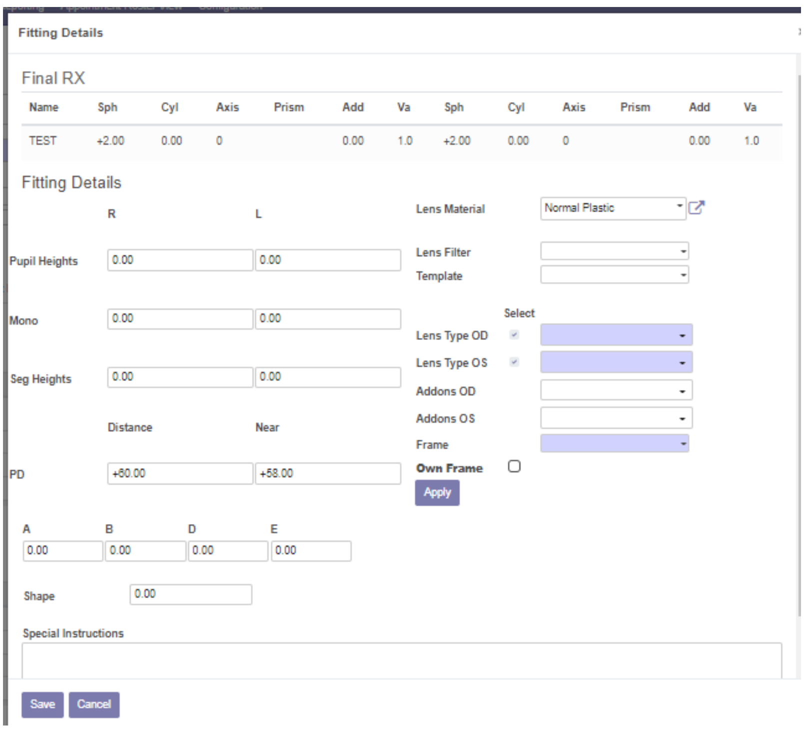
Version 16

Dispensing sheet

- Here you will select your Frames, lenses, C/L and place them in the orders que



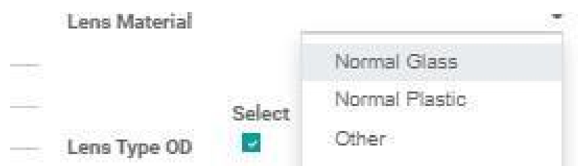
Final Rx (Spectacles



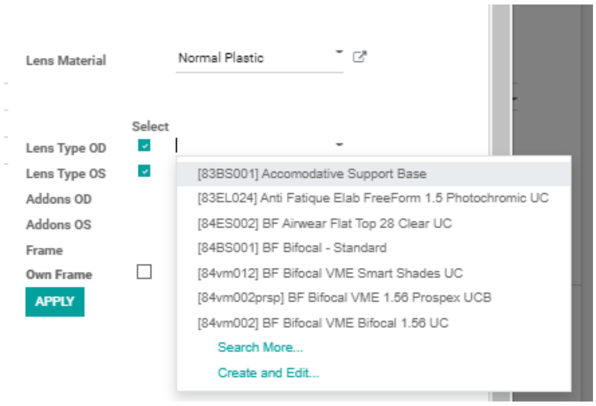
- The scripts selected to dispense in the clinical Tab, will reflect here.
- Click on (FITTING DETAILS) to open your dispensing sheet.

Important notice – Put in all dispensing details and special instructions for Orders before clicking – CREATE INVOICE, after that has been done. You cannot edit this page.

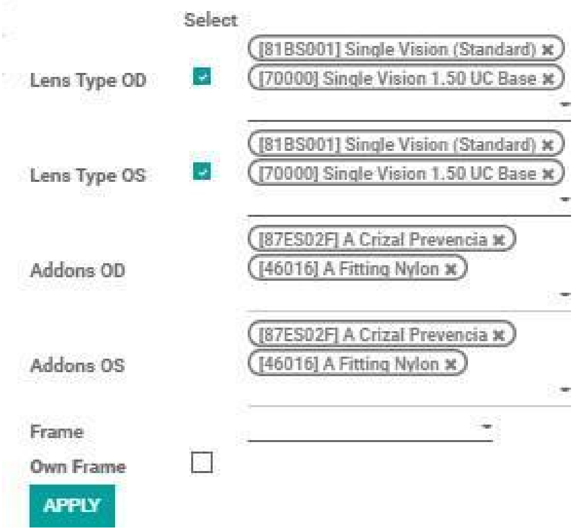
- Pupil Heights – to enter
- Mono – to enter
- Seg Heights – to enter
- PD – Pulled through from examination
- A , B , D , E - Frame measurements
- Shape – Shape of frame
- Special instructions – This will reflect on the order sheet for lab

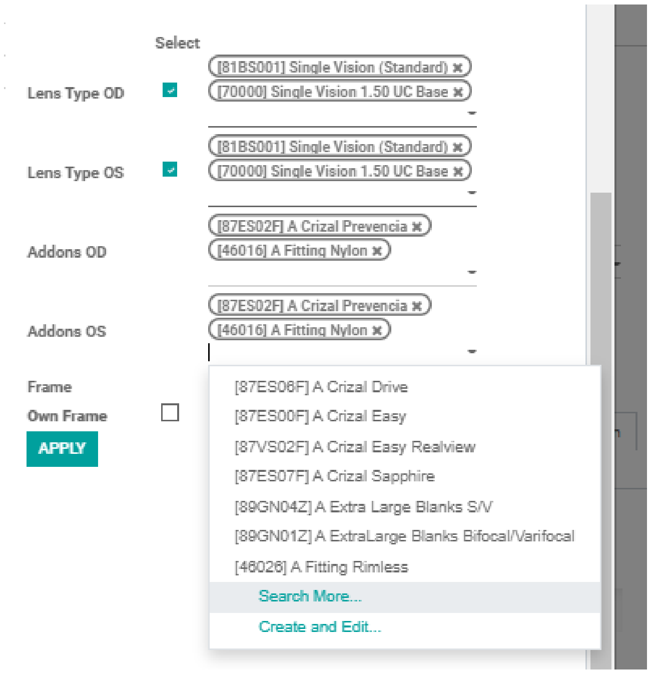


- Lens Material: should be selected. – Usually, you will select Normal Plastic
- Lens Filter: This creates a filter so that you view only that type of lens with building your quote.
- Template: This can be set up so that you can Auto populate the Base lens, lens design and add on of specific jobs you invoice a lot of.



- Lens Type OD and OS: Select the lens Type separately for each eye
  This is your BASE LENS and DESIGN





- Add-ons OD and OS – Select your coating/additional lens specifications
- Also, add fitting and dispensing fees here
- Additional Add-Ons can be created and edited from here by clicking on "Create" and Edit
- Here you can create and Edit the Add on as required.
- To search for more products than the dropdown list. Click on SEARCH MORE.

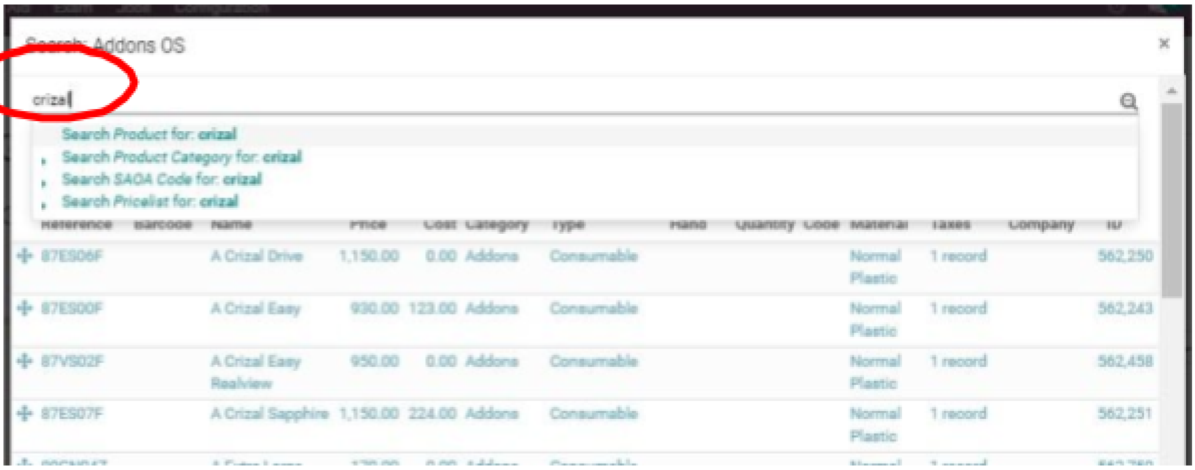
Once you have clicked on SEARCH MORE, another window will open where all the Add-Ons will reflect.

Type In what you want to search for in the search bar and select your Product.

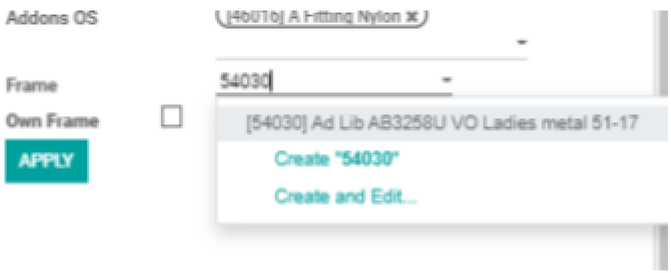
You can either search for:

- Product
- Product category
- SAOA code
- Or Pricelist

Make sure your selection matches your search option.



Frame



You can search for the frame under the barcode or the product description.

OR

If the patient is using an old frame, **you** choose the OWN Frame option.

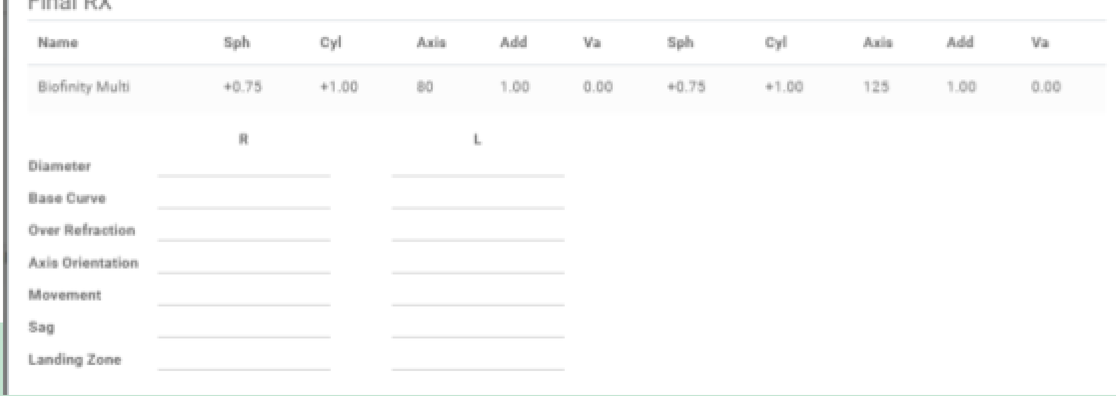
After you have selected the frame, click on the APPLY button for the draft quotation to reflect.

Click on SAVE to save your dispensing sheet.

Final Rx (Contact Lenses)

Here you can dispense your contact lenses.

Click on FITTING DETAILS



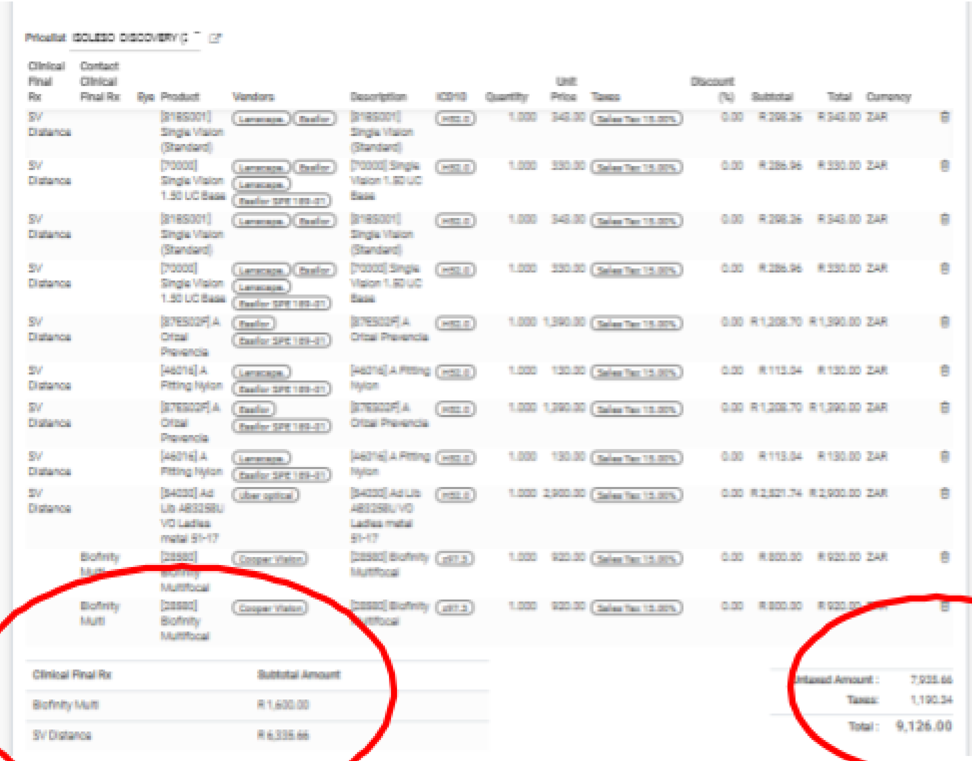
The script selected to dispense in the CONTACT LENS tab will pull through, as well as all the details put in that tab during the examination.

Add a line: Select the Product that you want to dispense.

Choose your Product either by the barcode or product description.
Choose the eye you are dispensing

Choose the lenses for the other eye and SAVE.
When you are in the dispensing sheet viewing your quotation, make sure that you select the correct Price List.

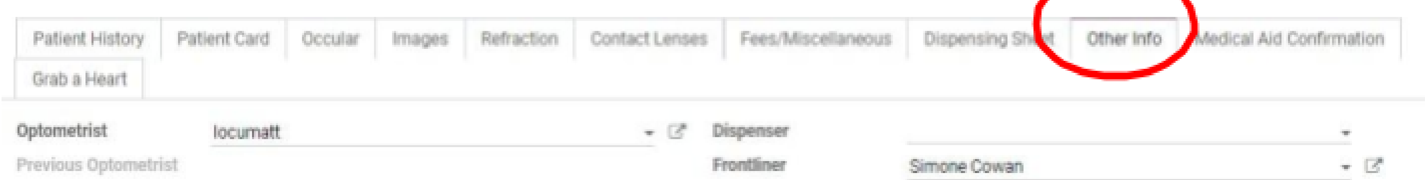
Total of the quote will reflect at the bottom right.
In the left corner you can view the subtotals for each pair of spectacles, or C/L



Other Info

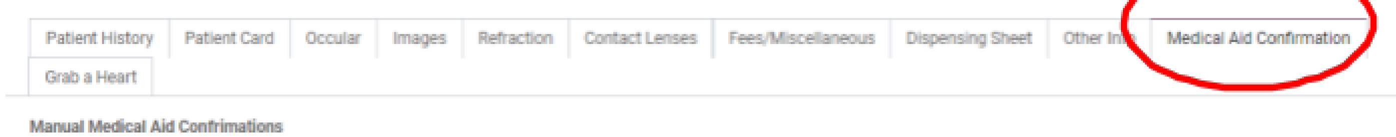
Here you will enter the:

1. Optometrist
2. The previous Optometrist will pull through from the previous test
3. Dispenser
4. Front liner – Patient information and Pre-test



Medical Aid Confirmation

Here you will be able to view the benefits that were confirmed.

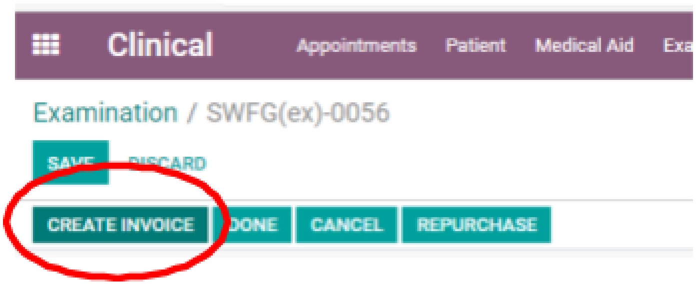


Grab a Heart

Here you record information about the patient to create a personal touch. Facts about the px to ask/talk about with the next visit.

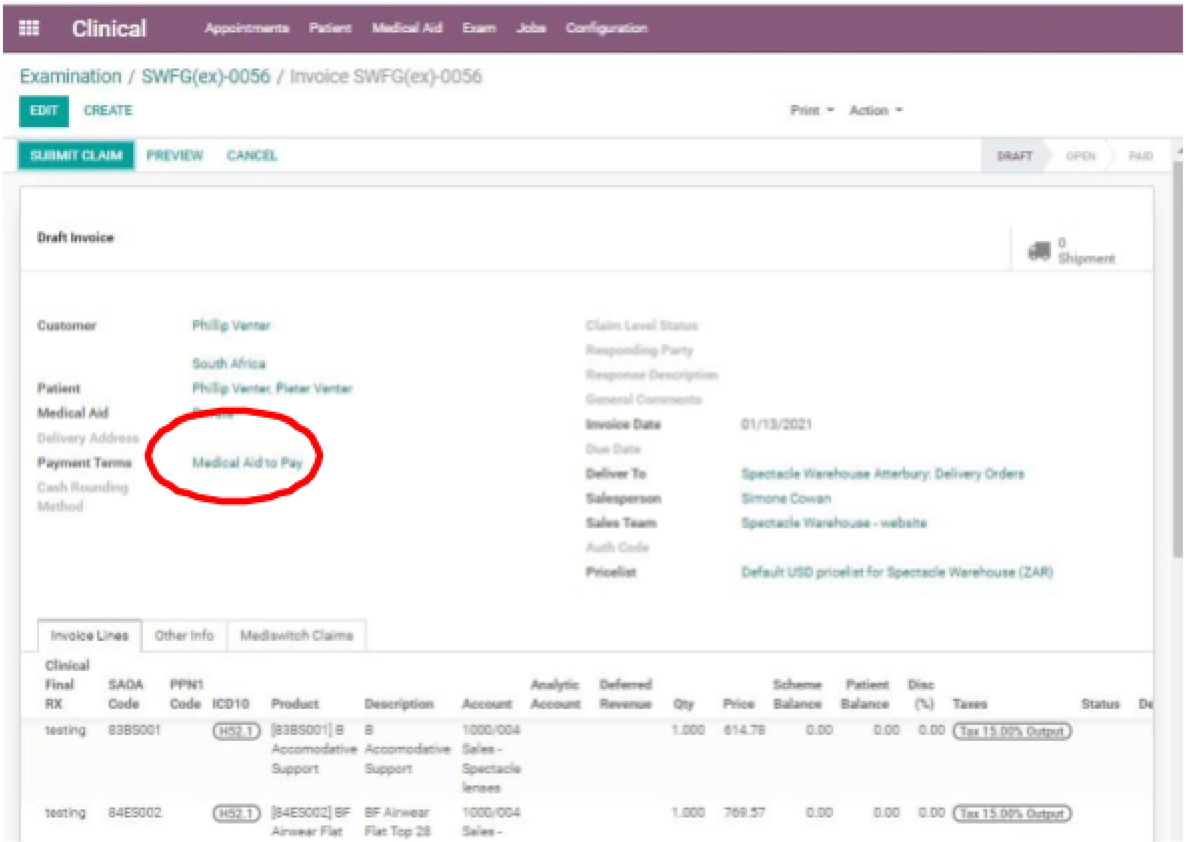
Creating the Invoice

- In your dispensing sheet, you can view the quote.
- Once you have changed the rates and happy with the amount, CLICK on the CREATE INVOICE icon on the top of the screen.

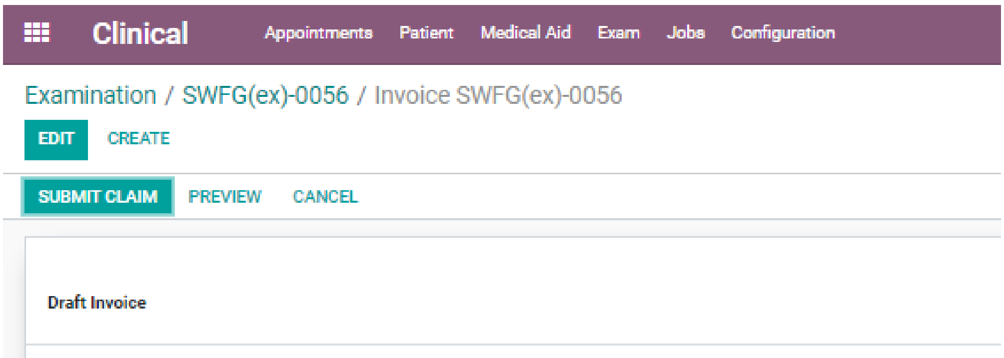


- Click on the Invoice icon in the right top corner to go to the draft invoice

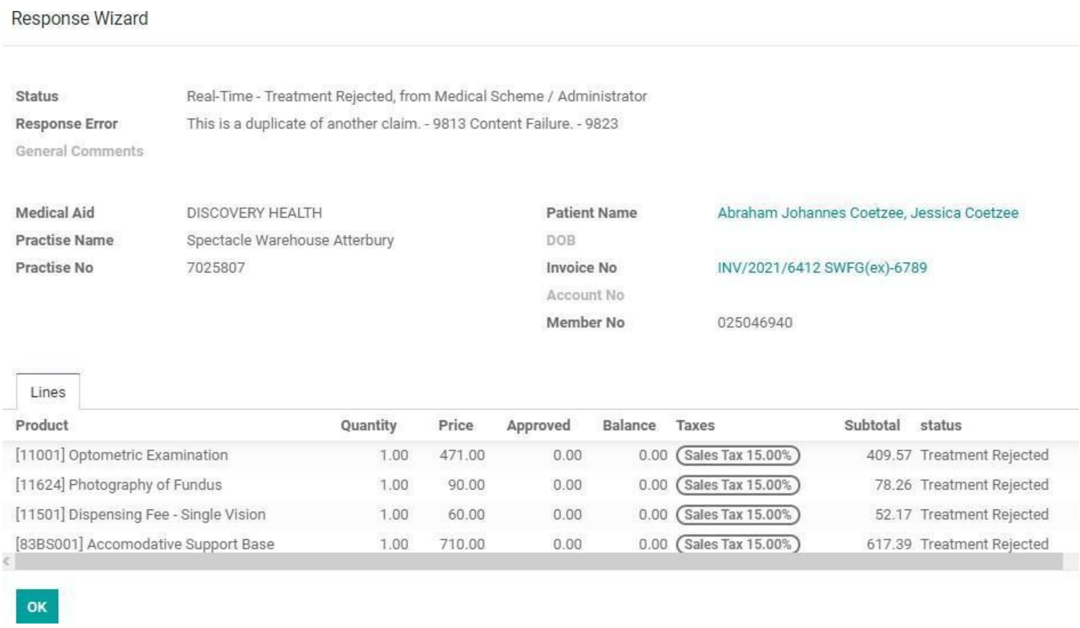
- Once you have opened your draft invoice, you will notice that the options on the top left have changed.
- Note: on a draft invoice, changes are still possible.
  E.g., Amounts, products, and Medical Aid/Patient to pay.
- The payment terms can be changed by clicking on EDIT, then Payment terms.



- There are two types of payment terms - Patient to Pay and Medical aid to pay.
  - You will validate the invoice to create an invoice number.
  - Then you can **Submit to medical aid**. You do this by clicking on the SUBMIT CLAIM icon in the right-hand corner.



  - As soon as you submit, the response wizard will pop up.



Response Wizard

Status	Real-Time - Treatment Rejected, from Medical Scheme / Administrator		
Response Error	This is a duplicate of another claim. - 9813 Content Failure. - 9823		
General Comments			
Medical Aid	DISCOVERY HEALTH	Patient Name	Abraham Johannes Coetzee, Jessica Coetzee
Practise Name	Spectacle Warehouse Atterbury	DOB	
Practise No	7025807	Invoice No	INV/2021/6412 SWFG(ex)-6789
		Account No	
		Member No	025046940

Lines

Product	Quantity	Price	Approved	Balance	Taxes	Subtotal	status
[11001] Optometric Examination	1.00	471.00	0.00	0.00	Sales Tax 15.00%	409.57	Treatment Rejected
[11624] Photography of Fundus	1.00	90.00	0.00	0.00	Sales Tax 15.00%	78.26	Treatment Rejected
[11501] Dispensing Fee - Single Vision	1.00	60.00	0.00	0.00	Sales Tax 15.00%	52.17	Treatment Rejected
[83BS001] Accomodative Support Base	1.00	710.00	0.00	0.00	Sales Tax 15.00%	617.39	Treatment Rejected

OK

The response will indicate if the medical aid will pay.

<u>There are three different responses</u>

1. **Realtime response - Response directly from Medical Aid /Administrator**

Treatment Approved for Payment

Treatment Approved for Part-payment

Treatment Rejected

2. **Claim accepted for delivery – Response from MediSwitch that your claim has been submitted to the MA.**

Treatment accepted for delivery

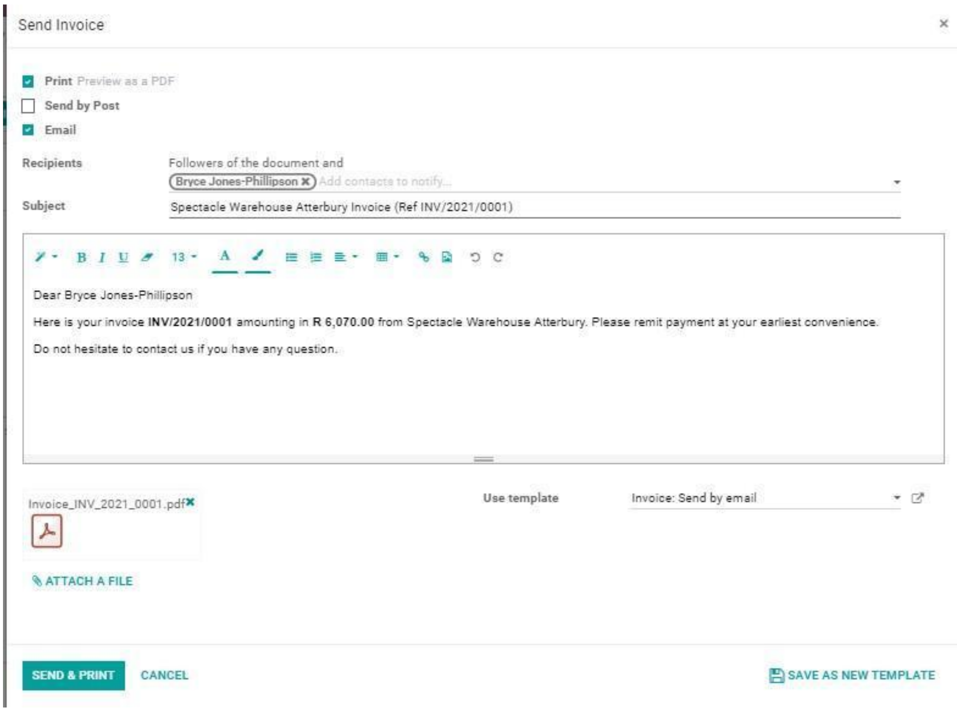
3. **Batched - Approved for delivery**

Connection to MediSwitch lost, as soon as connection is restored it should change to one of the above-mentioned statutes

- The Wizard will tell you if there are some partial payments.
- Look at the line items individually; then you will see the approved amounts in the Approved column and the balance payable by the patient in the Balance Column.
  The options you have now are:
- to take payment for the outstanding amount
- Send and print
- Reverse the claim
- add a credit note
- preview

Send and Print

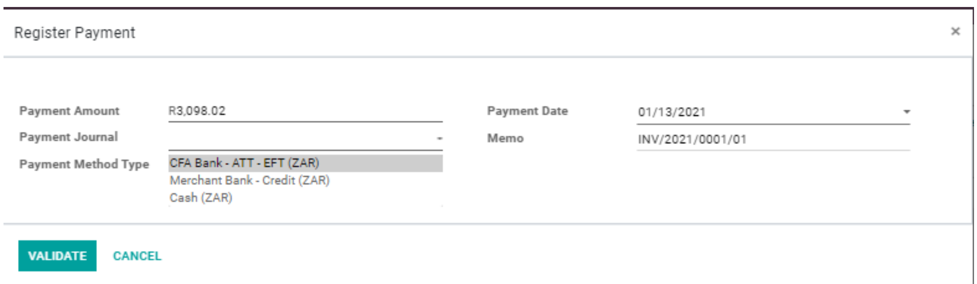
- Send and Print means that you can print the invoice and send it via email.
- Tick the actions you want to perform. (Print, Email or Send by Post)
- Print box ticked, which means that the invoice is going to print.
- Email is ticked, which means that you will email the template set up and attached invoice to the email saved on the patient's account.
- The template can be changed as well, and a new template can be created here.



- You can also add recipients if the patient wants the invoice sent to another email address or if you would like to mail it to debtors.

Register Payment

- To register a payment for the outstanding amount, a session must be open.

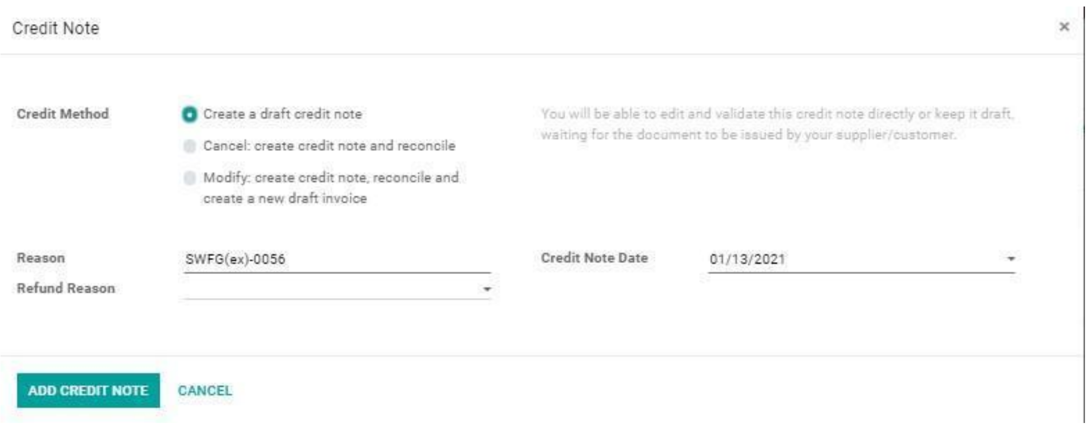


- Payment amount: This is the amount that you are taking the payment for.
- Remember to change the amount if the patient is only paying a deposit or making a partial payment.
- Payment journal: This will either be cash, Credit Card or EFT for bank payments.
- Payment date: Date payment is received
- Memo: Will be automatically linked to the invoice outstanding.

Reverse Claim:

- The Response reversal: Wizard will give you a response.
- The status will indicate the reversal. (Reversal accepted OR reversal rejected)

Add Credit Note:



- Credit Note will credit the invoice and return the stock.
- Credit method – Three options to choose from
  1. Create a draft credit note: This will create the credit note in a draft format, which you will then be required to **validate**.

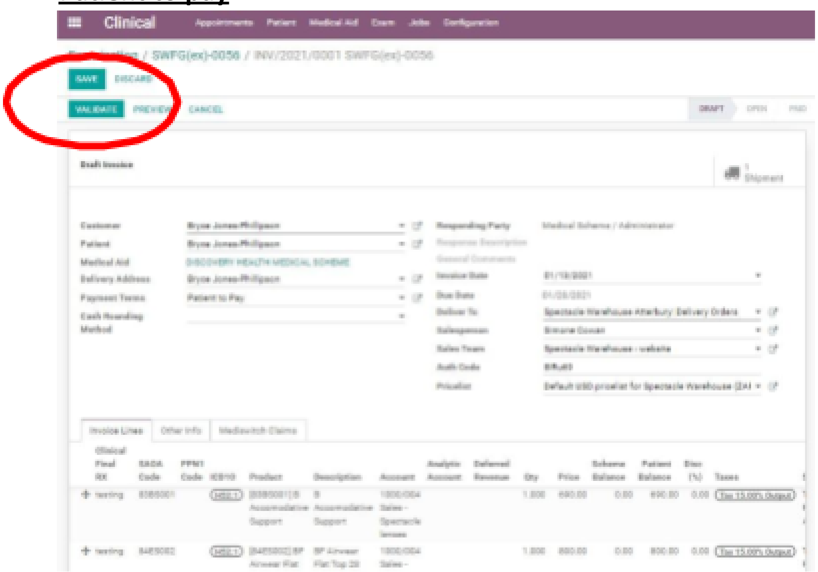
You can change the amount to be credited on the draft credit note.
You can also remove certain line items if you only want to do a partial credit.

2. Cancel: create a credit note and reconcile: This will create a credit note for your invoice as is and reconcile the transaction, thus no need to validate afterwards, as this option will validate automatically.
3. Modify: create a credit note, reconcile, and create a new draft invoice: Here, your entire invoice will be credited, and the credit note will be validated. There will also be a new Draft invoice which you can edit before invoicing.

- Reason – This will be the invoice number that you are doing the credit on.
- Refund reason – Here, you can choose a reason or create reasons why this credit is passed. It will be helpful with reporting on month-end.
- Credit note date: The date that you pass the credit note.

- Preview: This will preview what your invoice printout will look like.

Patient to pay



When you change the payment terms to – "Patient to pay".

You will see that there is a validate option in the top left.

You will have to validate the invoice to generate the invoice number.

Once validated, no changes can be made.

Once Validated, you can send and print, register a payment and add a credit note.

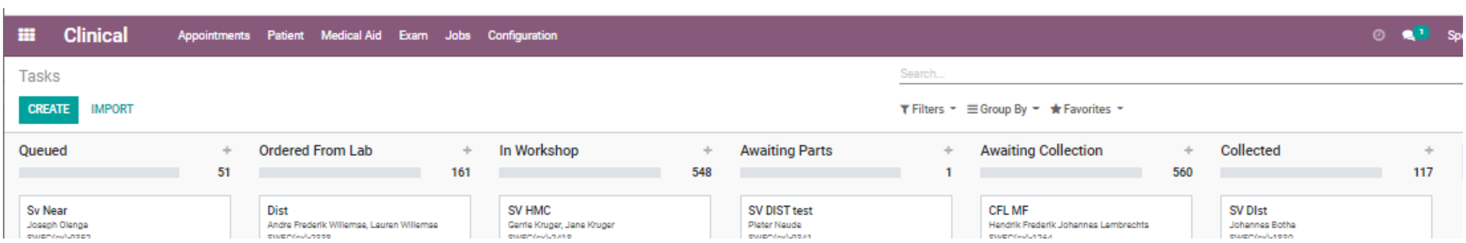
Placing your JOB in the JOB Queue

Once you have made the invoice and entered your special instructions, go back to the dispensing sheet and place your JOB in the ORDERS Queue to be processed.

You will only be able to see this option, once a job is invoiced.

Jobs

Here you will be able to view the Job tracking once placed in the orders que.



To view the full guidelines of this module, go to the JOB TRACK manual.