

Training Manual

Humint O Lite Version 16



Dispensing sheet

<u>o</u> _H	ere you v	will sele	ect you	r Frame	es, lenses, (C/L and	place t	them in the	orders	que

Patient History	Patier	t Card	Occula	r Imag	as Rafra	ction	Contact	Lenses	Fees/1	(scellar)	eous Diag	ensing 1	Sheet (Other Info	Med	cal Ald C	Confirmatio	on
Grab e Heart																		
inal RX (Sp	ectacl	es)																
lame	Sph	Cyl	Axis	Prism	Add	VA	Sph	Cyl	Axts	Prism	Add	VA	Dispense					
VDistance	+0.75	+1.00	80		0.00	0.00	+0.75	+1.00	125		0.00	0.00			ATTING D	ETALS	2	
unnies	+0.75	+1.00	80		0.00	0.00	+0.75	+1.00	125		0.00	0.00		~		ETAILS		
leaders	+1.75	+1.00	80		0.00	0.00	+1.75	+1.00	125		0.00	0.00	•			CTAR D		
																ETAILS		
nal RX (Co	ntact l	enses.)															
ame	Bp	h Q	yt J	kats A	dd VA	8	n q	yf A	ets .	Add	VA Task	Dis	pense					
Jofinity Multi	+0	75 +1	.00	80 1	1.00 0.0	0 +0	.75 +1	.00	125	1.00	0.00			FIT	TING DET	TAILS		
foelist Optical A	agistant i	HEDIC -	2															
Inical Final Rx	Contac	t Clinical	Final Rx	Eve P	roduct V	lendors	Descripti	on IC	p10 Qu	antity	Unit Price	Taxes	Discourt	100 8	lubtotal	Total	Currenc	
														1.9				
Clinical Final Rx				Subtotal	Amount										U	Intaxed /	Amount :	(
																	Taxes:	(
																	Total :	0

Final Rx (Spectacles

Neme optime optim optim optim	Name	Sob	CVI	Avic	Prism	Add	Va	Sob	Ovi	Avie	Prism	Add	Va
Fitting Details R L Lens Material Normal Plastic C* Aupil Heights 0.00 0.00 Lens Filter • • Mono 0.00 0.00 Lens Type OD Image: C* • Mono 0.00 0.00 Lens Type OD Image: C* • Mono 0.00 0.00 Lens Type OD Image: C* • Mono 0.00 0.00 Addons OD • • Distance Near Addons OS • • Mono +88.00 Own Frame • • AB D E • • •	Name	-o oo	0.00	AAIS	FIISIN	A00	¥a	apri	Cyr	AXIS	FIISIN	Aud	va t 0
Fitting Details R L Lens Material Normal Plastic Pupil Heights 0.00 0.00 Lens Filter - Atomo 0.00 0.00 Lens Tilter - Ieg Heights 0.00 0.00 Lens Type OD Select Ieg Heights 0.00 0.00 Lens Type OD Image: Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2"Co	1601	+2.00	0.00	0		0.00	1.0	+2.00	0.00	0		0.00	1.0
R L Lens Material Normal Plastic Pupil Heights 0.00 0.00 Lens Filter • Atomo 0.00 0.00 Lens Tilter • Atomo 0.00 0.00 Lens Type OD • Beg Heights 0.00 0.00 • • Distance Near Addons OS • Protect +58.00 • • Adons OS • • Protect +58.00 • Apply • •	Fitting De	etails											
Pupil Heights 0.00 0.00 Lens Filter Template • Aono 0.00 0.00 Select Lens Type OD • • Lens Type OD • • Lens Type OS • • Lens Type OS • • Distance Near Addons OS • PD +80.00 +58.00 • A B D E 0.00 0.00 0.00 •		R			L		Le	ns Material		Normal Plas	tic	- 🖸	
Acros 0.00 0.00 Lefts Filter Image: Computer co								Eile -				_	
Anno 0.00 0.00 Select Seg Heights 0.00 0.00 Lens Type OD Image: Comparison of the second s	Pupil Heights	0.00			0.00		Te	mplate				•	
Anno 0.00 0.00 Select Seg Heights 0.00 0.00 Lens Type OD Image: Comparison of the second s								mpiate					
Seg Heights 0.00 0.00 Addons OD • Distance Near Addons OS • r/D +60.00 +58.00 Own Frame • Agply Apply Apply	Mono	0.00			0.00		□		Select				
Beg Heights 0.00 0.00 Lens type US Image: Constraint of the state of t							Le	ins Type OD	×			•	
Addons OD - Distance Near Addons OS - Frame - Own Frame - Apply A B D E 0.00 0.00 0.00 0.00	Seg Heights	0.00			0.00			ins Type US	8			•	
Distance Near Addons US - PD +60.00 +58.00 Own Frame - Apply Apply Apply - -							Ac	Idons OD				•	
A B D E 0.00 0.00 0.00 0.00		Distance			Near		A	aons US				•	
Apply A B D E 0.00 0.00 0.00 0.00 0.00		.00.00			. 52 00			wn Frame	0				
A B D E 0.00 0.00 0.00 0.00	-0	+00.00			+30.00		_ /	Apply					
0.00 0.00 0.00	А	в	D		E								
	0.00	0.00	0	.00	0.00								
	Shape	0.0	0										
Shape 0.00	Special Instru	uctions											



• 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.

HUMINT

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

	Lens Material	-		
			Normal Glass	
		Select	Normal Plastic	
-	Lens Type OD		Other	

- o 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

HUMINT

- 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
- \circ SAOA code
- Or Pricelist

Make sure your selection matches your search option.

Secret: Ad	dons OS										
orizal)										0
Search / Search /	Product for: Product Cate	orizal agory for: orizal									
, Search &	Nicelist for:	crizal									
Heterence	Barcode	Name	Price	Cost Catego	ry iype	Hano Quar	iony uode in	natemai	laxes	company	ID
+ 87ES06F		A Crizal Drive	1,150.00	0.00 Addon	e Consumable		P	lormal fastic	1 record		562,25
4 87ES00F		A Crizal Easy	930.00	123.00 Addom	e Consumable		N P	lormal lastic	1 record		562,24
4 87VS02F		A Crizal Easy Realview	950.00	0.00 Addom	e Consumable		N P	lormal fastic	1 record		562,45
4 87ES07F		A Crizal Sapphir	e 1,150.00	224.00 Addon	e Consumable		N	lormal Sastic	1 record		562,25
1. 00010.07		17 millions	170.00	0.00 144-0	Con all			in mail	1		240.75
ame			then Noton								
Addons US		(HODIOLATI	cong region		-	You ca	n searc	h for	the fra	me uno	der th
Frame		54030		-		barcoo	de or th	e pro	duct d	escripti	on.
Own Frame		[54030] /	Ad Lib AB3	258U VO Lad	lies metal 51-17	OR					
APPLY		Creat	e "54030"			0.11					
		Creat	e and Edit	L		If the	patient	is usi	ing an c	old fram	ne, yo
						choos	e the O	WN F	rame o	ption.	
ter you hav PLY button ck on SAVE	e selec for the to save	ted the fra e draft quo e your disp	ime, cli itation bensing	ck on the to reflect. sheet.		ddons OS rame wn Frame	Own	Frame S	tting Nylon ¥ Selected		-
inal PV (Cont	actions	(20				APPLY					
	e-b	es)		us e-b	Col Aria	add NA T	wh Dire				
same Siofinity Multi	+0.75	+1.00 80	+1.00	0.00 +0.75	+1.00 125	1.00 0.00	isik Disp)	BITTO	NG DETAILS	
nal Rx (Con	tact Le	enses)									
re vou can	disper	nse vour co	ontact l	enses.							
		TAU 6									
CK ON FILLI	NG DE	IAILS									
ne	Sph	Cyl	Axis	Add	Va Sph	Cyl	Axis	Add	Va		
inity Multi	+0.75	+1.00	80	1.00	0.00 +0.75	+1.00	125	1.00	0.00		
eter	R			L							
Curve											

Axis Orientation Movement Sag Landing Zone

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.

Over Refraction		8								
[17530] Biofinity										
[14164] Biofinity Energys										
[28580] Biofinity Multifocal										
[93800] Biofinity Sphere XR										
[28575] Biofinity Toric										
Biofinity Toric Multifocal		Notes								
[28627] Biofinity Toric XR		Biof MF +1.	.00 +1.00N							
Create "biofinity"										
Create and Edit	ICD10	Quantity	Unit Price	Taxes	Discount (%)	Subtotal	Total	Currency	
biofinity -		1.000	0.00	-	0	00	R 0.00	R 0.00	ZAR	8
Add a line	(<u> </u>									

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

Product	Eye	Description	ICD10	Quantity	Unit Price	Taxes	Discount (%)	Subtotal	Total	Currency	
[28580]+	2 Right	- [28580] Biofinity	(z97.3)	1.000	920.00	Sales	0.00	R 800.00	R 920.00	ZAR	8
Add a line	Left	Multifocal	-			15 X					
	Right	-	-			*					

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.

Clinical	wh di (ZAR)											
Final Rx	BANKMED (NETWORK RATE) (ZAR)	Description	ICD10	Quantity	Unit Price	Taxes	Discount (%)	Subtotal	Total	Currency	
SV Distance	ISOLESO DISCOVERY NON- ISOLESO BANKMED NON-N	NETWORK (ZAR) ETWORK (ZAR)	[81BS001] Single Vision (Standard)	(H52.0)	1.000	343.00	(Sales Tax 15.00%)	0.00	R 298.26	R 343.00	ZAR	8
SV Distance	ISOLESO FEDHEALTH NON- ISOLESO MEDIPHILA NON-N	NETWORK (ZAR) IETWORK (ZAR)	[70000] Single Vision 1.50 UC Base	(H52.0)	1.000	330.00	(Sales Tax 15.00%)	0.00	R 286.96	R 330.00	ZAR	8
SV Distance	Create and Edit (Standard)		[81BS001] Single Vision (Standard)	(H52.0)	1.000	343.00	(Sales Tax 15.00%)	0.00	R 298.26	R 343.00	ZAR	8
SV Distance	[70000] Single Vision 1.50 UC Base	Lenscape.) (Essilor) Lenscape.) (Essilor SPE 189-01)	[70000] Single Vision 1.50 UC Base	(H52.0)	1.000	330.00	(Sales Tax 15.00%)	0.00	R 286.96	R 330.00	ZAR	8
SV Distance	[87ES02F] A Crizal Prevencia	Essilor SPE 189-01	[87ES02F] A Crizal Prevencia	(H52.0)	1.000	1,390.00	(Sales Tax 15.00%)	0.00	R 1,208.70	R 1,390.00	ZAR	8
SV Distance	[46016] A Fitting Nylon	Lenscape.	[46016] A Fitting Nylon	(H52.0)	1.000	130.00	(Sales Tax 15.00%)	0.00	R 113.04	R 130.00	ZAR	ê





SV Dislance [#185001] (memory field) [#185001] (mEmory field)	Final Rx	Clinical Final Rx	Pvo.	Product	Vandors	Description	10210	Quartity	Unit	Танео	Discount (%)	Subtrital	Total	Currency	
SV Distance Distance Sruge Vision Single Visio	SV Distance			[8185001] Single Vision (Standard)	Laranga (Balir)	[8185001] Single Vision (Standard)	(HELD)	1.000	348.00	(Sales Tec 15.07%)	0.00	R 298.36	R 343.00	ZAR	8
SV [31:85001] (mmmm file [31:85001] (mmm (1.000 343.00 (also Test 15.0%) 0.00 R.286.26 R.146.00 2.44 (i) SV Distance Brigs Vision (iii) (iiii) (iii) (iii) (iii) (iii) (iii) (iii) (iii) (iii) (iii)	SV Distance			[70000] Single Vision 1.50 UC Base	(Laracapa) (Basler (Laracapa) (Basler 1787 182-21)	(70000) Single Vision 1.90 UC Base		1.000	330.00	(Sales Tex 15.075)	0.00	R 286.96	R 330.00	ZAR	8
SY Distance D00001 Englis (rision 1.500 (Distance Englis (rision 1.500 (Distance Englis (rision 1.500 (Distance Englis (rision 1.500 (Distance Englis (rision 1.500 (Distance Pawancia Pawancia Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia SY Distance Pawancia Pawancia SY Distance Pawancia Pawancia Pawancia SY Distance Pawancia Pawan	SV Distance			(8185001) Single Vision (Standard)	Lavaraja (Baller)	(2189001) Single Vision (Standard)	HEID	1.000	348.00	(Sales Tec 15.075)	0.00	R 298.26	R 343.00	ZAR	8
SV [37E302F].A (min) (Dadius 287,181-3) [37E302F].A	SV Distance			[70000] Single Vision 1.50 UC Base	Laracaya (ballor Laracaya) (Basilor SPE 182-21)	[10000] Single Vision 1.90 UC Base	(H510)	1.000	330.00	(Sales Tex 15.015)	0.00	R 286.96	R 330.00	ZAR	8
SV [44016] A Lamaza [44016] A Riting Myton Lamaza [44016] A Riting (million) 1.000 1.000 1.000 1.000 1.000 1.000 1.000 1.000 R110.04 R110.04 R110.00 DAR B SV [Protection] A (medic) [BTERDDF, A [BTERDDF,	SV Distance			(87ES02F) A Ortzal Prevencia	(Easter SPE 101-31)	(87E902F) A Ortzal Pherencia	(121)	1.000	1,390.00	(Sales Ter 15.075)	0.00	R1,208.70	R 1,390.00	ZAR	8
SV [375302F]A (audio) [375302F]A (audio) <	SV Distance			[46016] A Fitting Nylon	(Leracapa) (Earlier 2FE 102-01)	[46016] A Peting Nylon	(121)	1.000	130.00	(Sales Tec 15.075)	0.00	R113.04	R 130.00	ZAR	8
SV [46016] A Cameratia [46016] A Rtting (mto) 1.000 100.00 Caller Text 15.005 0.00 R113.04 R100.00 ZAR If SV Distance Pathog bylon Caller 2RE 181-01 Mylon 1.000 120.00 Caller Text 15.005 0.00 R113.04 R100.00 ZAR If SV Distance U.b A53258U Jestic 2RE 181-01 Jestic 2RE 181-01 Jestic 2RE 181-01 0.00 R2.00.00 ZAR If SV U.b A53258U Jestic 2RE 181-01	SV Distance			(876502F] A Orizal Prevencia	(Tasfor) (Tasfor SPE 183-11)	(\$76902F] A Ortoal Pherencia	(1011)	1.000	1,390.00	Sales Tex 15.075	0.00	R1,208.70	R1,390.00	ZAR	Û
SV [94202] Add Usb #335880 [94202] Add Usb (mtt) A832880/00 [94202] Add Usb (mtt) A83280/00 1.000 2,900.00 (add mt) (15.005) 0.00 R 2,221.74 R 2,900.00 ZAR 6 Distance VOLLative mater SH-17 Listative SH-17 Listative SH	SV Distance			[46016] A Fitting Nylon	(Laranapa) (Easilor SPE 109-01)	(46016) A Pitting Nylan	HEE	1.000	190.00	(Sales Ter 15.075)	0.00	R113.04	R 130.00	ZAR	8
Biofmity [25502] Conservation [25502] Conservation [25502] Conservation [25502] Conservation [25502] Conservation	SV Distance			[54030] Ad LIb A83258U VO Ladies metal 51-17	(Uber optical)	[54030] Ad LIb A83258U VO Ladies metal 51-17	(#51.0)	1.000	2,900.00	(Sales Yaz 15.00%)	0.00	R2,521.74	R 2,900.00	ZAR	8
Biofrety Multi [28382] Biofrety Multi Compare Vision [28382] Biofrety Multi 1.000 920.00 [Sales Nat. 13.00%) 0.00 R.800.00 R.900.00 R.900		Biofinity Multi	-	[28580] Brothing Multifocal	(Cooper Vision)	(28583) Biofinity Multifocal	(#73)	1.000	920.00	(Sales Ter 15 10%)	0.00	R 800.00	R 920.00	ZAR	8
CBHoal Final Rx Bublishal Amount 7/201.64 Biofinity Multi R1.600.00 Taxware 1/190.34		Bofinity Multi		[28580] Biofnity Multifocal	(Cooper Vision)	(20502) Bioferty No.070cal	(#73)	1.000	920.30	(Sales Tec 13.00%)	0.00	R.800.00	R 923.03		8
Biofinity Multi R 1,600.00 Taxes: 1,120.34	Clinical	Rinal Rx			Subtotal Amount							-6	taxed Amos	at: 7,5	35.66
Tatal: 9126.00	Bofnity	MUR			R 1,600.00							_	Та	NEE: 1,1	90.34
SV Distance R 6,335.66	SV Dista	nos			R 6,335.66								Т	Gel: 9,12	00.8

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

Patient History	Patient Card	Occular	Images	Refraction	Contact Lense	Fees/Miscellaneous	Dispensing Shert	Other Info	Medical Aid Confirmation
Grab a Heart								\smile	
Optometrist	locumatt				• C*	Dispenser			
Previous Optometri	st					Frontliner	Simone Cowan		- C*

Medical Aid Confirmation



Manual Medical Aid Confrimations

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.

1	Patient History	Patient Card	Occular	Images	Refraction	Contact Lenses	Fees/Miscellaneous	Dispensing Sheet	Other Info	Medical Aid Confirmation
	Grab a Heart									
R	ecord free hand inf	ormation about	the patient	to create th	e personal tour	ch. Like a vacation H	ie/She was telling you al	bout		

Info about patient useful to future exams

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

Examination / SWFG(ex)-0056		
SAVE DISCARD		
	Exams Exams Invoices	Active

- 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.

E Cli	nical		Appointm	enta Patient	Medical Aid	Exam J	obe Co	régenation								
xaminati	ion / SW	FG(e	x)-0056	o / Invoice S	SWFG(ex)-00	056										
EDIT CR	EATE										Print *	Action -				
SURMIT CL	AIM PRE	VIEW	CANC	n.										DRAFT O	PEN)	PAR
Draft Invoi	ice													0 Sh	pment	
Customer	Customer Phillip Venter South Africa							Claim Level 1	Status							
								Responding	Party							
Patient Philip Venter, Pieter Venter				r, Pleter Venter				Response De	recription							
Medical Ai	id	-	-					General Con		01/7	3/2021					
Delivery A	ddress							Due Date			10) anna 1					
Payment T	Terms	1.64	dical Aid	to Pay				Deliver To		Spec	ctacle Ware	house Atte	bury: De	elivery Orders		
Cash Roun	sding	-	_					Salesperson			Simone Cowan					
NAME OF TAXABLE PARTY O								Sales Team		Spe	ctacle Ware	house - wel	bsite			
								Auth Code								
								Pricelist		Defa	ult USD price	cellet for Sp	ectacle	Warehouse (ZAR)		
Invoice L	Lines Oti	her Inf	o Med	Iswitch Claims												
Clinical Final RX	SAOA Code	PPN1 Code	ICD10	Product	Description	Account	Analytic Account	Deferred Revenue	Otv	Price	Scheme	Patient Balance	Disc (%)	Taxes	Status	
testing	83B5001		(H52.1)	[8385001] 8	В	1000/004			1.000	614.78	0.00	0.00	0.00	(Tax 15.00% Output)		í
				Accomodative Support	Accomodative Support	Sales - Spectacle lenses										
testing	84ES002		(H52.1)	[84ES002] BF Ainwear Flat	BF Airwear Flat Top 28	1000/004 Sales -			1.000	769.57	0.00	0.00	0.00	(Tax 15.00% Output)		

- There are two types of payment terms Patient to Pay and Medical aid to pay.
 - \circ $\;$ 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.

	Clinical	Appointments	Patient	Medical Aid	Exam	Jobs	Configuration					
Exan Edit	Examination / SWFG(ex)-0056 / Invoice SWFG(ex)-0056											
SUB	MIT CLAIM PREVIE	W CANCEL										
Dra	ft Invoice											

 \circ $\;$ As soon as you submit, the response wizard will pop up.

Response Wizard

Status Response Error

Real-Time - Treatment Rejected, from Medical Scheme / Administrator This is a duplicate of another claim. - 9813 Content Failure. - 9823 General Comments

Medical Aid	DISCOVERY HEALT	Ή		Patien	t Name	Abraham Johan	nes Coetzee, .	Jessica Coetzee			
Practise Name	Spectacle Warehou	use Atterbury		DOB							
Practise No	7025807			Invoice	e No	INV/2021/6412	INV/2021/6412 SWFG(ex)-6789				
				Accou	nt No						
				Memb	er No	025046940					
Lines											
Product		Quantity	Price	Approved	Balance	Taxes	Subtotal	status			
[11001] Optometric Ex	amination	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 Fe	ee - Single Vision	1.00	60.00	0.00	0.00	(Sales Tax 15.00%)	52.17	Treatment Rejected			
[83BS001] Accomoda	1.00	710.00	0.00	0.00	(Sales Tax 15.00%)	617.39	Treatment Rejected				

The response will indicate if the medical aid will pay.

There are three different responses

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.
- o 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 0
- Send and print 0
- Reverse the claim 0
- add a credit note 0
- preview 0

Examination / SWFG(ex)-0056 / INV/2021/0001 SWFG(ex)-0056			
SEND & PRINT REGISTER PAYMENT REVERSE CLAIM ADD CREDIT NOTE PREVIEW CANCEL	DRAFT	OPEN	PAID

Send and Print

• Send and Print means that you can print the invoice and send it via email.

HUMINT

- 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.

Dist D	507		
Print Preview as a	PDF		
Send by Post			
Email			
Recipients	Followers of the document and		
	(Bryce Jones-Phillipson X) Add contacts to notify		
lubject	Spectacle Warehouse Atterbury Invoice (Ref INV/2021/0001)		
Here is your invoice Do not hesitate to co	INV/2021/0001 amounting in R 6,070.00 from Spectacle Warehouse Atte ontact us if you have any question.	rbury. Please remit payment at your earliest cor	nvenience.
Here is your invoice Do not hesitate to oc	INV/2021/0001 amounting in R 6,070.00 from Spectacle Warehouse Atte intact us if you have any question.	rbury. Please remit payment at your earliest cor	ivenience.
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 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	R3,098.02	Payment Date	01/13/2021	-
Payment Journal		- Memo	INV/2021/0001/01	
Payment Method Type	CFA Bank - ATT - EFT (ZAR)			
	Merchant Bank - Credit (ZAR) Cash (ZAR)			



HUMINT

- 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:

Response Revers	al Wizard			×
Status	Real-Time - Treatment Reversal Accepted, from	Medical Scheme / Administ	trator	
Response Error				
General Comments				
Medical Aid	DISCOVERY HEALTH MEDICAL SCHEME	Patient Name	Bryce Jones-Phillipson	
Practise Name	Spectacle Warehouse Atterbury	DOB	04/10/1997	
Practise No	7025807	Invoice No	INV/2021/0001 SWFG(ex)-0056	
		Account No		
		Member No	697383671	
ок				

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

Add Credit Note:

Credit Method	O Create a draft credit note	You will be able to ed	it and validate this credit note direct	dy or keep it draft,
	Cancel: create credit note and reconcile	waiting for the docum	ient to be issued by your supplier/ci	astomer.
	Modify: create credit note, reconcile and create a new draft invoice			
eason	SWFG(ex)-0056	Credit Note Date	01/13/2021	•
efund Reason				

- 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.
- 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

WALKATE		CANCEL										DBU	n) o
Evali Innoice													att],
Customer Patient		Bryne Jones I Bryne Jones I	6.7pace 6.7pace		- 0		anding Party error Descript		Medical Ini	harna / Adr	rinanatur		
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Delivery Addre		Brytes Jones-P	e-ripson						01/08/0821				
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Mathod									Bimare Covar				
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Pinal RX	taca p Cude C	1000 10010	Product	Description	Accent	Analytic Account	Deferred Revenue	Gry	Price	Solution Englance	Patient Eslance	Disc (%)	Taxes
d terring	8089001	(HEL1)	(8385081).6 Accomulation Support	B Assembletion Depart	1000-004 Sales - Spectack			1.80	690.00	0.80	890.00	0.00	(Tas 15.02
					larrows.								

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

HUMINT

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.

	Clinical	Appointments	Patient	Medical Aid	Exam	Jobs	Configuration								0 📢	s
Task	S									Search						
CRE	IMPORT									▼ Filters ▼	≡Gro	oup By 🍷 ★ Favorites 👻				
Queu	ed	+	Ordered	From Lab		+	In Workshop	+	Awaiting Parts	+	Aw	vaiting Collection	+	Collected	+	
		51				161		548		1			560		117	
Sv N Josep	ear h Dienge (willhoso		Dist Andre Fred	lerik Willemse, Leur	ren Willemse		SV HMC Gerrie Kruger, Jane Kruger		SV DIST test Pleter Naude		CF	FL MF andrik Frederik Johannes Lambrachts		SV Dist Johannes Botha		

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