# Healthmetrics

# OPTICAL USER GUIDE

**24/7 SUPPORT LINE: +603-7661 6229**

**LIVE CHAT: http://www.healthmetrics.co**

# TABLE OF CONTENT

# TABLE OF CONTENT

# 1. HOW TO LOGIN?



Step 1: Visit https://www.healthmetrics.co

Step 2: Click on "Sign In"

# 1. HOW TO LOGIN?



Choose your sign-in option

Please choose the option that's applicable to you

Step 3: Click on "Healthcare Partners"

**Corporate** Clients
Portal access for benefits administrators and HR personnel

**Healthcare** Partners **3**
Portal access for healthcare providers

**HealthMetrics** Members
Members Web App for employees and dependents

# 1. HOW TO LOGIN?
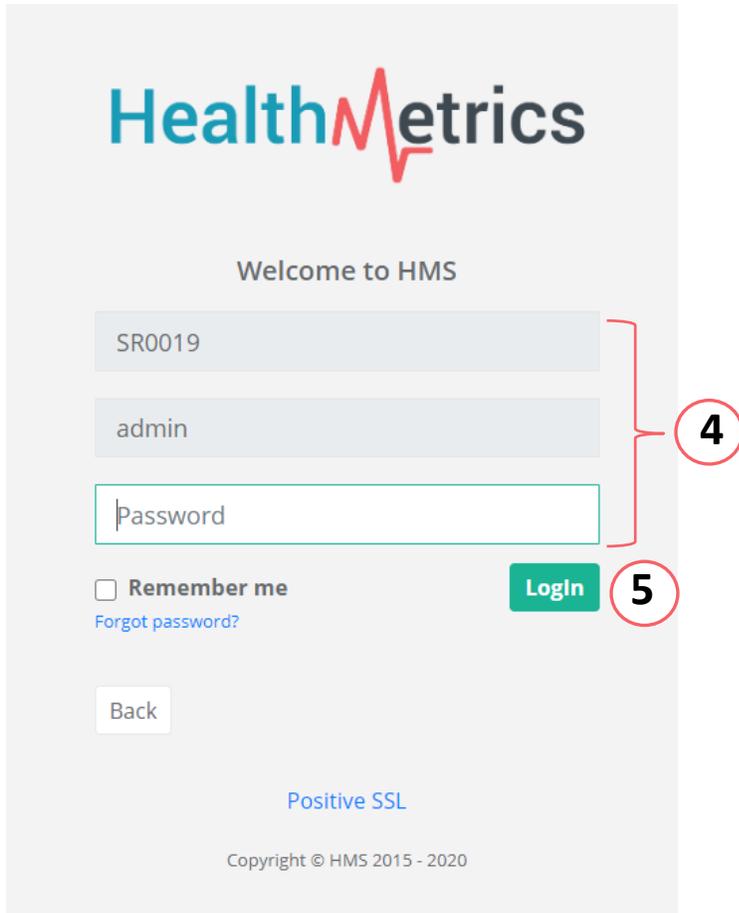


The login details can be found in your email with email subject "HealthMetrics Login Details".

Step 4: Fill in the panel code, username and the default password "2020HMs01"

You will be asked to change password in the following page if you are logging in for the first time.

Step 5: Click on "Login".

# 2. HOW DO I GET STARTED?



Dashboard is the first page you see after logging in.

# 2. HOW DO I GET STARTED?



Below are the explanations for each function:

1) Menu toggle

2) Announcement kit

3) Language [English/Bahasa Melayu]

4) Select Panel Location [ Applicable for clinics with more than one location]

5) Info ⓘ icon [ To view details]

6) To check-in new patient

# 2. HOW DO I GET STARTED?



7) The [grid icon] icon shows the monthly performance metrics for:

**Submitted Patient Visits** - Total patient claims submitted

**Cashless Claims Collected** - Total RM amount for all cashless patient claims submitted

**Average Submission Time** - for from patient check-in to submission, inclusive of late submissions

**Average Claim Price Range** - for flu and fever related visits (inclusive of consultation) for the last 12 months

# 3. HOW TO VERIFY HEALTHMETRICS MEMBER?



Sample 1: IC
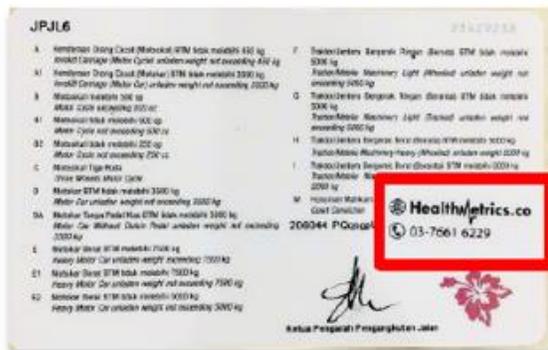


Sample 2: Driving license
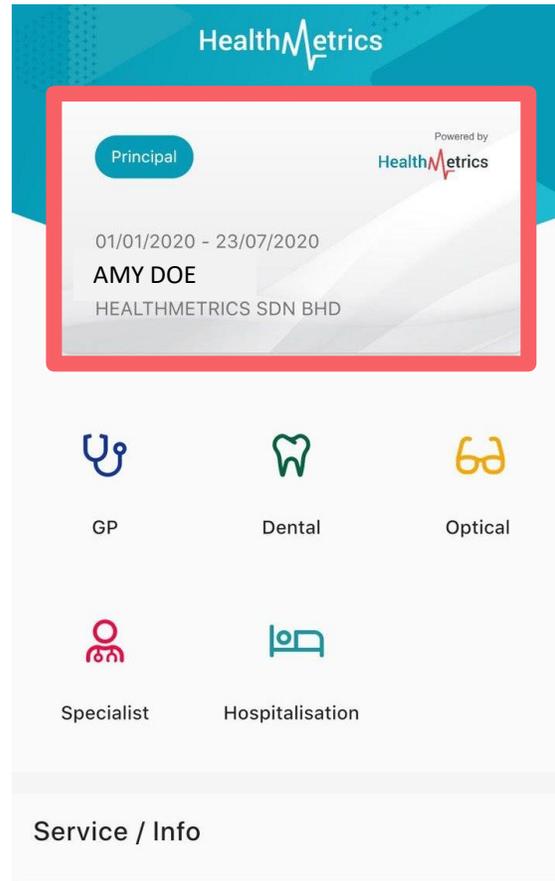


Sample 3: HealthMetrics Mobile App

During patient registration, the members will present HealthMetrics sticker on IC or driving license.

The samples are shown in Sample 1 and Sample 2.

Alternatively, the members will present e-card from HealthMetrics mobile app (refer Sample 3)

***To note:*** *If the member has none of these, please proceed to key in the IC number in our portal. The patient profile will be displayed if he/she is a HealthMetrics member.*

# 4. HOW TO CHECK-IN PATIENT?



Step 1: Click on

Step 2: Click on "Patients"

Step 3: Insert IC number [Local] or Passport number [Non-Malaysian] and click on
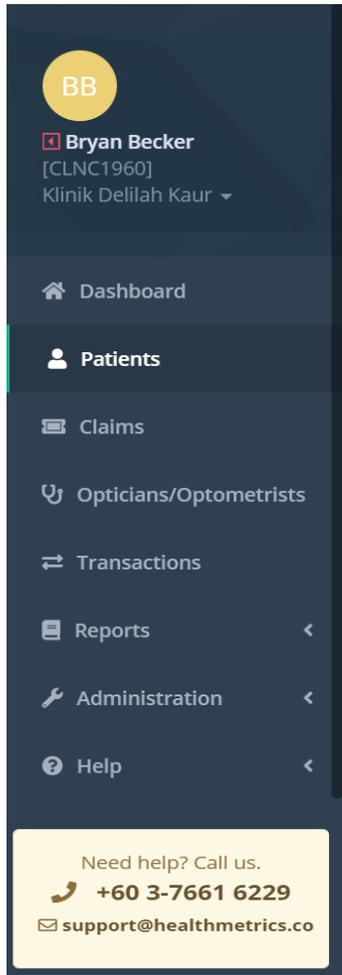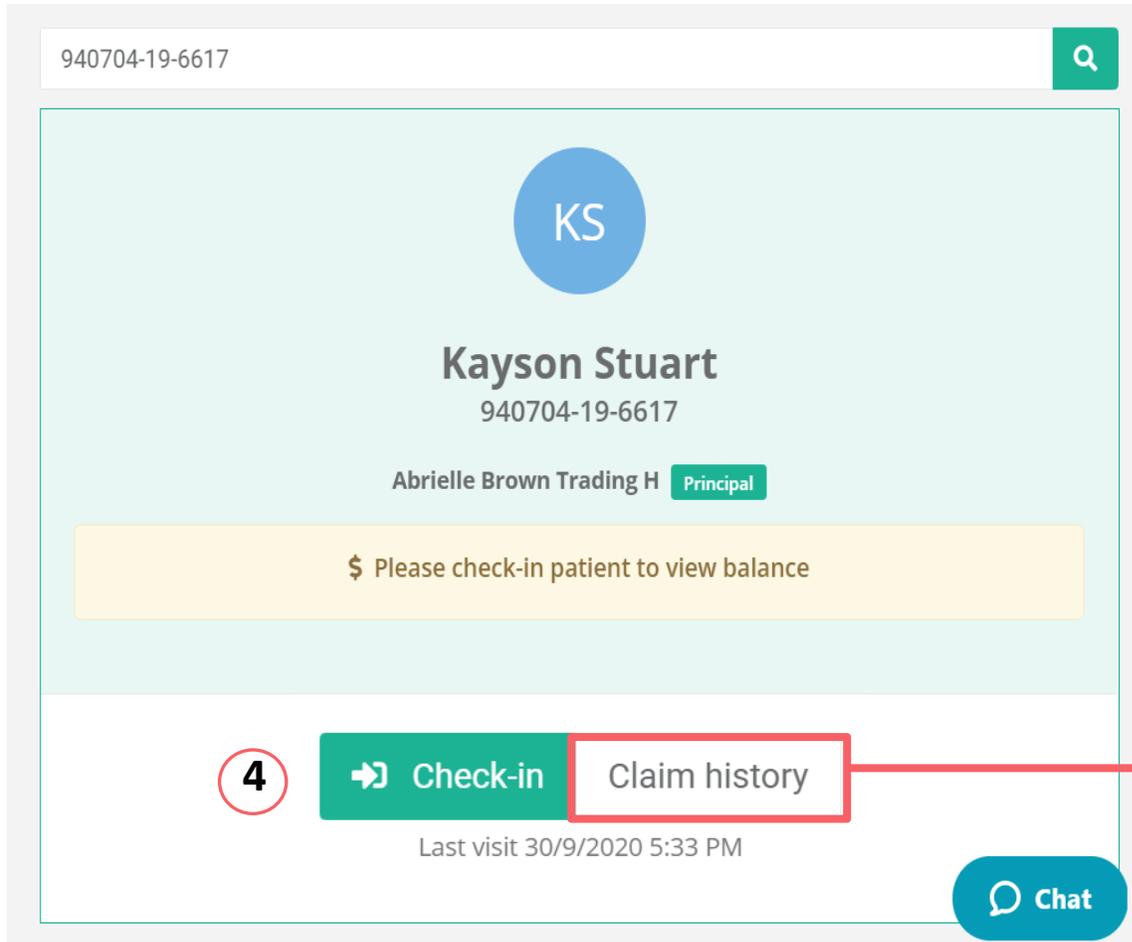
# 4. HOW TO CHECK-IN PATIENT?



Step 4: Click on **Check-in** to view the balance of patient

***Pro-Tip:*** *The displayed profile includes the previous visit history.*

# 4. HOW TO CHECK-IN PATIENT?


Example 1.1


Example 1.2

Once you clicked on "Check-in", the HR will be notified on patient check-in matter.

The important messages will be reminded such as in Example 1.1 and Example 1.2.

Step 5: Click on **Understood**

# 5. HOW TO SUBMIT CLAIMS?



Step 1: Click on [New claim]
You will be directed to the claim submission page.

***Pro-Tip:*** *The displayed profile includes the limit/entitlement of the patient and the uncovered treatments.*

*The remaining time for claim submission is displayed in this section as well. Do remember to submit the claim within 24hours!*

# 5. HOW TO SUBMIT CLAIMS?



ⓘ Limit RM300.00

Patient:

**Kayson Stuart** (940704-19-6617)

**Abrielle Brown Trading H**
No. 1604, Jalan Alexandria Yang
47500 Subang Jaya
Selangor, MY

**Klinik Delilah Kaur A** (Change)
No. 1048, Jalan Shaun Kelley, 50480 Kuala Lumpur,
Wilayah Persekutuan Kuala Lumpur, MY
P: +60 157217182

**Thursday, 1 October, 2020 3:47 PM**

Step 1: Confirm doctor and prescription  ②

Attending optician/optometrist *

Ms Hana Kemp

| # | Eyewear * | Description/Prescription/Remark | Max amount | Amount * | |
|---|-----------|--------------------------------|-----------|----------|---|
| 1 | Prescription Glasses | R. PL/-0.25X25, L.  Please explain | 9999 | 300 | 🗑 |
| 2 | Nothing selected | | | | 🗑 |

Add lines    Clear all lines

Total : RM300.00

Covered amount : RM300.00

Step 2: Input the first section which includes

i.   Attending optician/optometrist
ii.  Eyewear details
iii. Description/Prescription/Remark
iv.  Amount charged

**Health\etrics**    15

# 5. HOW TO SUBMIT CLAIMS?

Step 2 : Confirm information and submit ③

✓ I confirm the information here is correct

Cancel   💾 Save draft   Issue claim ④

Step 3: Tick ✓ to confirm information is accurate

Step 4 : Lastly click [Issue claim]

***Pro-Tips:***
*i) For incomplete claims, you can click on [Save draft] , and return to Dashboard to complete the claim when it is convenient.*

# 5. HOW TO SUBMIT CLAIMS?
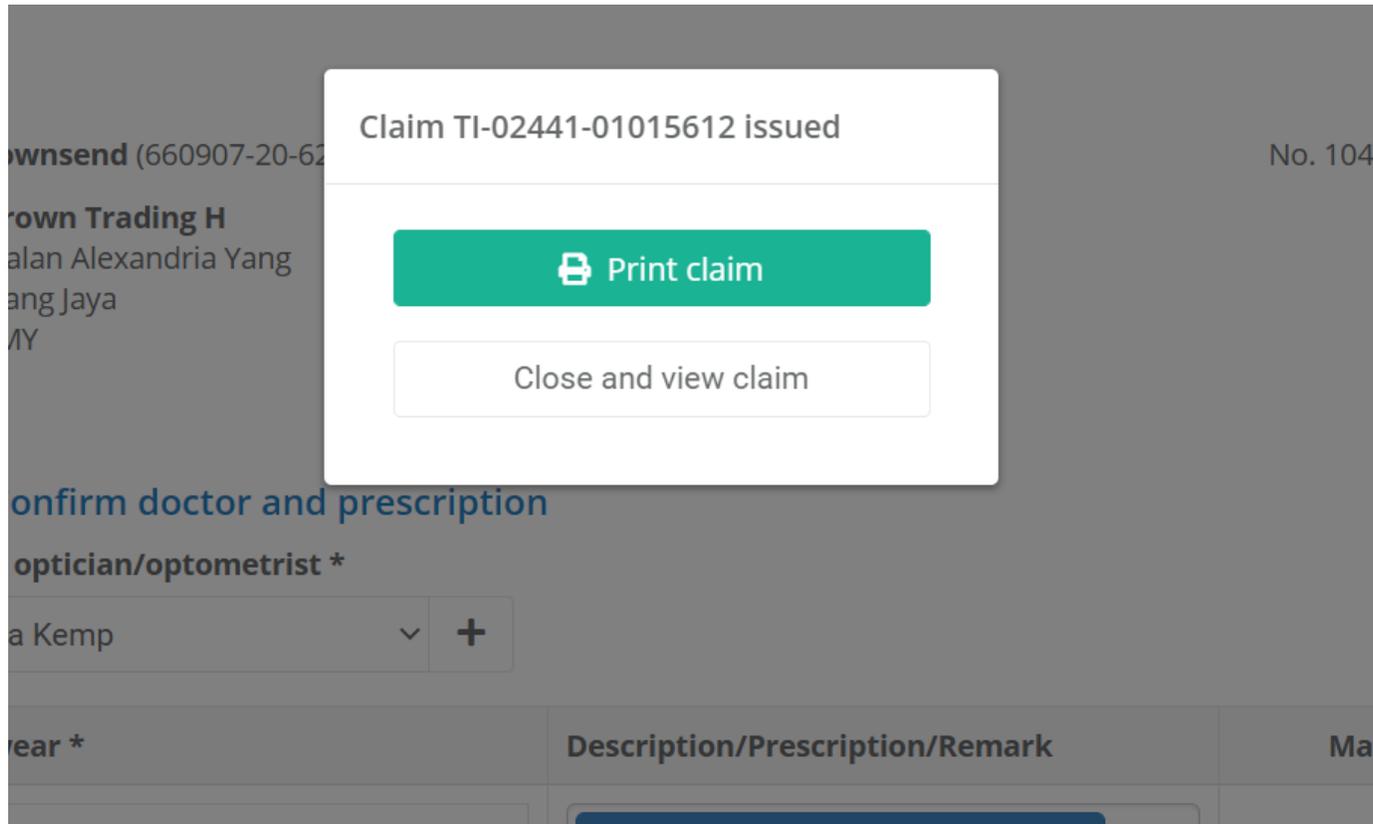


After successfully submit, a random ticket number will pop up.

*Pro-Tips:*
*i) You can click* [Print claim] *to print the ticket or*
*ii) You can click* [Close and view claim] *to view the claim.*
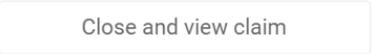
# 6. HOW TO VIEW MY SUBMITTED CLAIMS?



Step 1: Click on "Claims"

Step 2: Choose any desired submitted claims, then click on 🔍 View

# 6. HOW TO VIEW MY SUBMITTED CLAIMS?

Claims

**Print**

Last updated: Friday, 2 October, 2020 4:26 PM

View audit history

Patient:

**Kayson Stuart** (940704-19-6617)

**Abrielle Brown Trading H**
No. 1604, Jalan Alexandria Yang, 47500 Subang Jaya,
Selangor, MY

Claim no.

**TI-02441-01015606**

**Klinik Delilah Kaur A**
No. 1048, Jalan Shaun Kelley, 50480 Kuala Lumpur,
Wilayah Persekutuan Kuala Lumpur, MY
P: +60 157217182

**Friday, 2 October, 2020**

**Attending optician/optometrist**

Dr Hana Kemp

| # | Eyewear | Description/Prescription/Remark | Amount |
|---|---------|--------------------------------|--------|
| 1 | Prescription Glasses | Short sighted and astigmatism | 300.00 |

| | | |
|---|---|---|
| | **Total :** | RM300.00 |
| | **Covered amount :** | RM300.00 |

‹ Back    Edit

This is an example of a submitted claims.

**Health Metrics**

19

# 7. HOW TO EDIT THE SUBMITTED CLAIMS?



Step 1: Click on "Claims"

Step 2: Choose the submitted claims that needs to be amended, then click on 🔍 View

# 7. HOW TO EDIT THE SUBMITTED CLAIMS?

## Claims

🖨 Print ▾

Last updated: Friday, 2 October, 2020 4:26 PM

View audit history

**Patient:**

**Kayson Stuart** (940704-19-6617)

**Abrielle Brown Trading H**
No. 1604, Jalan Alexandria Yang, 47500 Subang Jaya,
Selangor, MY

**Claim no.**

TI-02441-01015606

**Klinik Delilah Kaur A**
No. 1048, Jalan Shaun Kelley, 50480 Kuala Lumpur,
Wilayah Persekutuan Kuala Lumpur, MY
P: +60 157217182

**Friday, 2 October, 2020**

**Attending optician/optometrist**

Dr Hana Kemp

| # | Eyewear | Description/Prescription/Remark | Amount |
|---|---------|--------------------------------|--------|
| 1 | Prescription Glasses | Short sighted and astigmatism | 300.00 |

| | | |
|---|---|---|
| | **Total :** | RM300.00 |
| | **Covered amount :** | RM300.00 |

‹ Back    🖉 Edit    **③**

Step 3: Scroll down the page and click on 🖉 Edit

**HealthMetrics**

# 7. HOW TO EDIT THE SUBMITTED CLAIMS?

Patient:

**Kayson Stuart** (940704-19-6617)

**Abrielle Brown Trading H**
No. 1604, Jalan Alexandria Yang, 47500 Subang Jaya,
Selangor, MY

Claim no.

TI-02441-01015606

**Klinik Delilah Kaur A**
No. 1048, Jalan Shaun Kelley, 50480 Kuala Lumpur,
Wilayah Persekutuan Kuala Lumpur, MY
P: +60 157217182

**Friday, 2 October, 2020**

### Step 1: Confirm doctor and prescription
Attending optician/optometrist *

Dr Hana Kemp

| # | Eyewear * | Description/Prescription/Remark | Max amount | Amount * | |
|---|-----------|----------------------------------|------------|----------|---|
| 1 | Prescription Glasses | Short sighted and astigmatism ✕  1 PAIR OF LENSES ✕ | 9999 | 300 | 🗑 | **④** |
| 2 | Nothing selected | | | | 🗑 |

Add lines     Clear all lines

Total :   RM300.00

Covered amount :   RM300.00

### Step 2 : Confirm information and submit
☑ I confirm the information here is correct   **⑤**

Cancel   💾 Update claim   **⑥**

---

Step 4: Input the desired changes on this page. E.g. change of attending doctor's name or description.

Step 5: When you are done, tick ☑

Step 6: Then, click on **Update claim**

**_To note:_** *However, updating claims is not permitted under two (2) conditions :*

*i.   To increase the price from the current submitted claims*

*ii.  To backdate an MC*

*Kindly contact our support line +603-76616229 if you need assistance.*

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# 7. HOW TO EDIT THE SUBMITTED CLAIMS?



Step 7: Input the reason/explain

Step 8: Click on OK

# 8. WHERE CAN I CLICK TO ADD A NEW OPTICIANS/OPTOMETRISTS?



Step 1: Click on "Opticians/ Optometrist"

Step 2: Click on **＋ Create new optician/optometrist**

Create new optician/optometrist

Choose doctor type

◯ Permanent    ✓ Locum

Name *

[                                        ]

Panel locations

[ None                                   ]

**Grant all**  Clear all

Cancel    🖫 Save ④

③

Step 3: Input the following details:

i.    Select "Permanent" OR
      "Locum"
ii.   Input your new Optician's
      name
iii.  Select/Input Panel Locations

Step 4: Click on   🖫 Save

# 9. HOW CAN I EDIT AN OPTICIANS'S DETAIL?



Step 1: Click on "Opticians/Optometrists"

Step 2: Click on **⚙ Actions ▾** and "Edit"

# 9. HOW CAN I EDIT AN OPTICIANS'S DETAIL?

Edit optician/optometrist: Ms Hana Kemp

**Choose doctor type**

✓ Permanent      ○ Locum

**Name ***

Ms Hana Kemp

**Panel locations**

Klinik Delilah Kaur A ✕

Grant all    Clear all

**MMC registration number** Optional

Cancel    🖫 Save    ④

③

Step 3: Make any necessary changes

Step 4: Click on    🖫 Save

# 10. HOW TO VIEW THE TRANSACTION SUMMARY?



Step 1: Click on "Transaction"

Step 2: Select the desired transaction type

Step 3: Click on [Search]

# 10. HOW TO VIEW THE TRANSACTION SUMMARY?



Step 4: Click on **⚙ Actions ▾** and you will have the options to

i. View
ii. Print
iii. Send email
iv. View the details claims

**HealthMetrics Sdn. Bhd.**
B-04, Level 4, Jalan USJ 25/1,
The Place @ One City,
47650 Subang Jaya, Selangor
P: +60 3-7661 6229

INVOICE

IN-1904-185525-P

**Date:** 30/4/2019
**Paid date:** 28/6/2019

**Description:** Healthcare services provided for stated corporate companies

This invoice has been paid.

| # | Activity | Amount |
|---|----------|--------|
| **Location: Klinik Kiana Ballard A** | | |
| 1 | New ticket: Azariah Daniel, Teresa Montgomery Trading, TI-0816-01012486, 9/4/2020, Klinik Kiana Ballard A | RM40.00 |
| 2 | New ticket: Alexis Howell, Davin Barron Trading A, TI-0816-01008815, 9/4/2020, Klinik Kiana Ballard A | RM98.00 |
| 3 | New ticket: Asia Cabrera, Keira Roy Trading, TI-0816-01012079, 9/4/2020, Klinik Kiana Ballard A | RM105.00 |
| 4 | New ticket: Otto Fernandez, Luca Riddle Trading A, TI-0816-01011704, 9/4/2020, Klinik Kiana Ballard A | RM120.00 |

| | |
|---|---|
| **Sub Total (excl. SST) :** | RM363.00 |
| **Service Tax @ 0% :** | RM0.00 |
| **TOTAL (INCL. SST) :** | RM363.00 |

Expenses by location

| Location | Amoun ↑ |
|----------|---------|
| Klinik Kiana Ballard A | R |

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This is an example of an invoice.

**Health**Metrics

Step 1: Click on "Transactions"

Step 2: View the invoice status in the table.

***To note:***
The status of successful payment will be shown as **Closed**

Otherwise, it will be shown as **Open**

This is an example of Claim Payment details which include the payment date, payment method and reference number.

Click on the invoice link to view the claims details.

# 12. HOW TO COMPLETE THE PENDING CLAIM?



Step 1: Click on "Dashboard"

Step 2: Click on New claim

Patient:

**Brantley Fields** (940521-18-8667)

**Kamron Harrington Trading K**
No. 330, Jalan Kolten Merrill
60000 Kuala Lumpur
Wilayah Persekutuan Kuala Lumpur, MY

**Klinik Delilah Kaur A** (Change)
No. 1048, Jalan Shaun Kelley, 50480 Kuala Lumpur,
Wilayah Persekutuan Kuala Lumpur, MY
P: +60 157217182

**Sunday, 4 October, 2020 5:27 PM**

**Step 3: Fill in the sections accordingly**
   i.   Select attending optician/optometrist
   ii.   Select eyewear
   iii.   Description/Prescription /Remark
   iv.   Amount charged

**Step 1: Confirm doctor and prescription** ③

Attending optician/optometrist *

| Dr Hana Kemp | ▾ | + |

| # | Eyewear * | Description/Prescription/Remark | Max amount | Amount * | |
|---|---|---|---|---|---|
| 1 | Prescription Glasses ▾ | FRAME x  Please explain | 9999 | 180 | 🗑 |
| 2 | Prescription Contact Lens ▾ | 1 Pair Contact Lens x  Please explain | 9999 | 60 | 🗑 |
| 3 | Nothing selected ▾ | | | | 🗑 |

Add lines   Clear all lines

| Total : | RM240.00 |
| Covered amount : | RM0.00 |
| Collect cash : | RM240.00 |

**Step 4: Tick** ✅ **to confirm**

**Step 2 : Confirm information and submit** ④
✅ I confirm the information here is correct

Cancel   💾 Save draft   🎫 Issue claim   ⑤

**Step 5: Click on** 🎫 Issue claim

# 13. HOW TO ADD MORE USERS AND LIMIT THEIR ACCESSIBILITY?



Step 1: Click on "Administration" and "Users".

Step 2: Click on    + Create new user

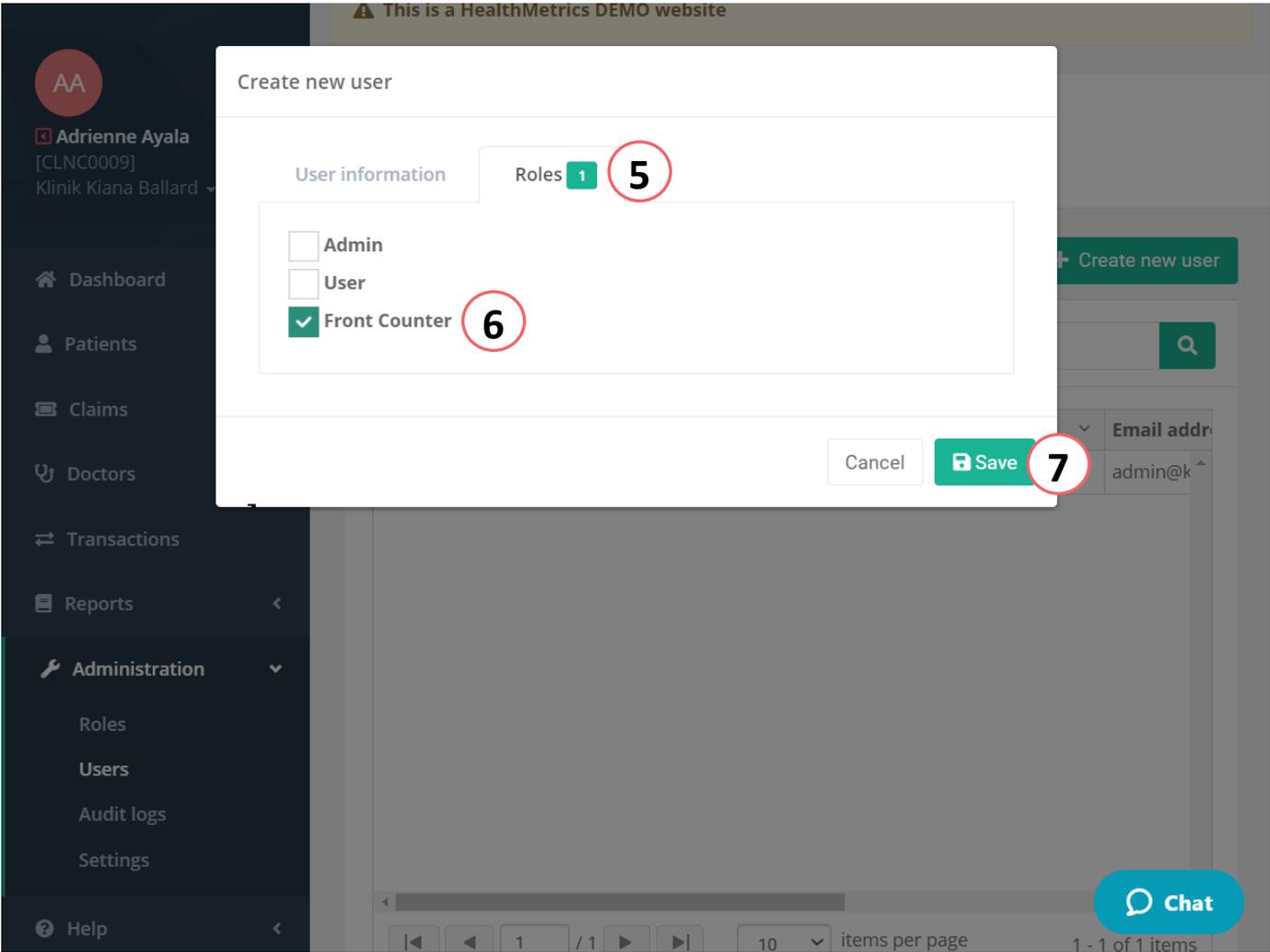# 13. HOW TO ADD MORE USERS AND LIMIT THEIR ACCESSIBILITY?



Step 3: Input the following details
i.    Name (mandatory)
ii.   Email address
iii.  User name (mandatory)
iv.   Default panel location

Step 4: Tick ✓ the following item
i.    User activation
ii.   User account password generated automatically or create on your own
iii.  To let the user change password on next login

# 13. HOW TO ADD MORE USERS AND LIMIT THEIR ACCESSIBILITY?



Step 5: Next, click on "Roles" tab

Step 6: Select the "Role" assigned to the user

Step 7: Click on [Save]

Step 8: Click on "Administration" and "Roles"

Step 9: Click on [+ Create new role]

# 13. HOW TO ADD MORE USERS AND LIMIT THEIR ACCESSIBILITY?
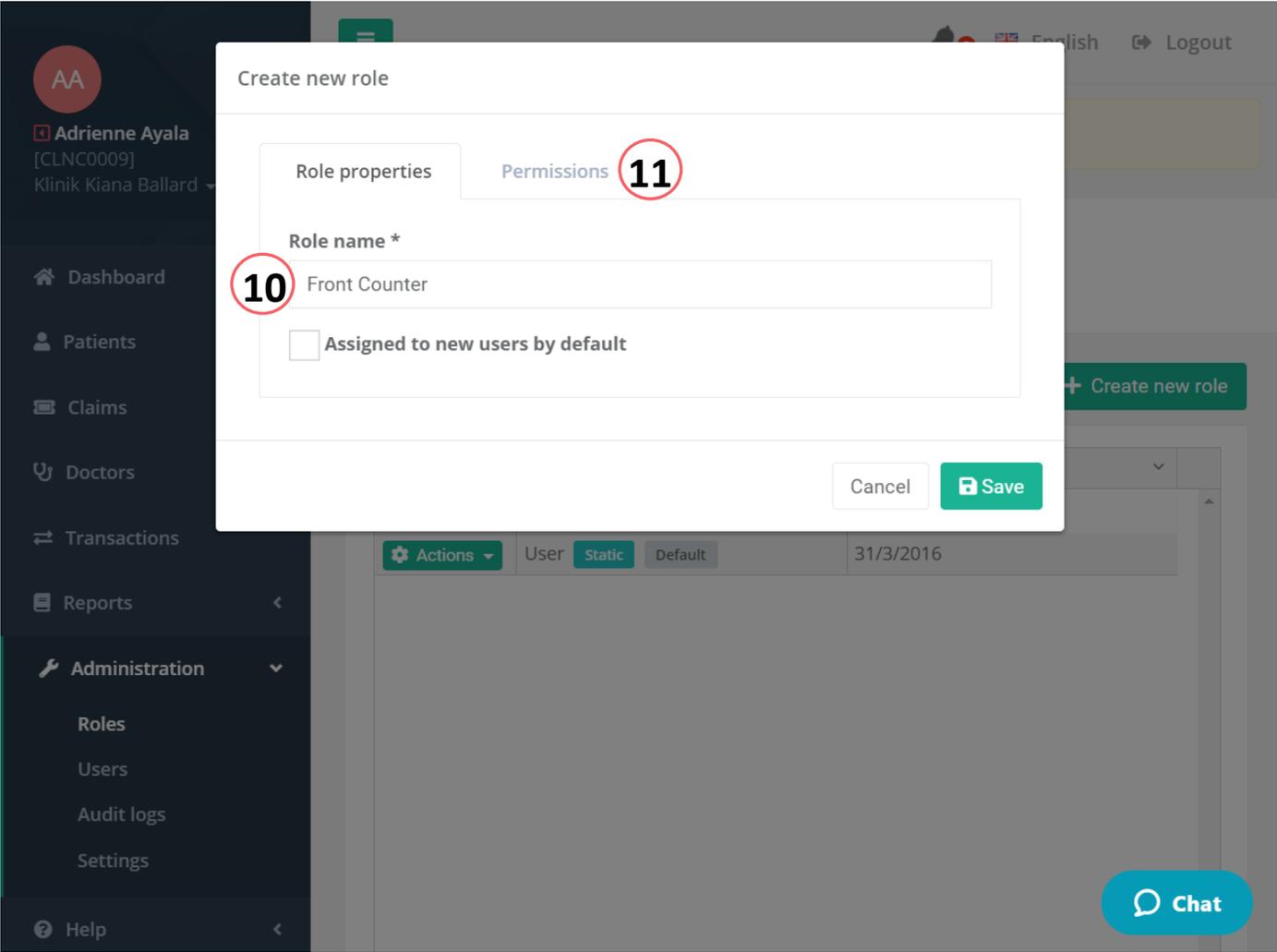


Step 10: Fill up the "Role name"

Step 11: Click on "Permissions" for the settings

Step 12: Tick to allow access to which permission setting

Step 13: Click on 🖫 Save

# 14. IS THERE A MANUAL USER GUIDE?

**Step 1:** Click on "Help" and "Panel Manual" for the PDF copy

*To note: Video guides are available as well. Please click to watch the following:*

i.      *Intro to help*

ii.     *Manage doctor*

iii.    *Attend patients*

iv.     *Check tickets*

v.      *Check transaction*

vi.     *Manage roles*

vii.    *Manage users*

# 15. HOW DO I SUBMIT A LATE CLAIM?



Step 1: Click on "Dashboard"

Step 2: Under "Patient Check-Ins"

widget, click on **Request late claim**

Step 3: Fill in the details such as

i.    Panel staff name

ii.   Reason of late claim

Choose "others" if the reason is not listed.

Step 4: Click on **Next →**

# 15. HOW DO I SUBMIT A LATE CLAIM?

⚠ Final covered amount for a late claim is subject to patient's entitlement balance at time of request approval.

**Step 1: Confirm doctor and prescription**

Attending optician/optometrist *

⑤

| # | Eyewear * | Description/Prescription/Remark | Max amount | Amount * | |
|---|-----------|--------------------------------|-----------|----------|---|
| 1 | Prescription Glasses | Frame x  Please explain | 9999 | 250 | 🗑 |
| 2 | Nothing selected | | | | 🗑 |

Add lines    Clear all lines

⑥    Total :    RM250.00

**Step 2 : Confirm information and submit** ⑦
☑ I confirm the information here is correct

Cancel    ▭ Submit for approval    ⑧    Clear all

ion **10.1.74** | 🕐 6/10/2020 8:42:19 AM +08:00    Copyright ©

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Step 5: Fill in the treatment details section

Step 6: Check the total amount

Step 7: Tick ☑ to confirm

Step 8: Click on  **Submit for approval**

# 16. HOW TO EDIT OUR OPERATING HOURS?



Step 1: Click on "Administration" and "Settings".

Step 2: Click on "Operating Hours".

***Pro-Tip: (only applicable to clinics with more than 1 branch)***
*Click on "Panel Location" drop-down to select which branch to be edited upon.*

# 16. HOW TO EDIT OUR OPERATING HOURS?



Step 3: Click on **Normal hours**

Step 4: Then, click on **✎ Edit**

Step 5: Complete the schedule information:

i. Opening day

ii. Select "Closed" / "Open 24 Hours"/ to set your own setting, click on "Hours".

iii. Edit the Opening Hour (I.e. 9:00 AM) AND Closing Hour (I.e. 6:00 PM)

In this schedule #1, the lunch break will be from 1 PM to 2 PM.

Step 6: Click on **Save**

***Pro-Tip:*** *Click on "Add hours" to set different operation hours for other day. E.g. Saturday and Sunday*

# 17. HOW TO UPDATE OPERATION HOUR FOR PUBLIC HOLIDAY?



Step 1: Click on "Administration" and then click on "Settings".

Step 2: Click on "Operating Hours".

***Pro-Tip: (only applicable to clinic with more than 1 branch)***
*Click on "Panel Location" drop-down to select which branch to be edited upon.*

# 17. HOW TO UPDATE OPERATION HOUR FOR PUBLIC HOLIDAY?



Step 3: Click on **Special hours**

Step 4: Then, click on **Edit**

# 17. HOW TO UPDATE OPERATION HOUR FOR PUBLIC HOLIDAY?



Step 5: Complete the Schedule information:

i.   Select from "Closed" OR "Open 24 Hours"

ii.  OR select "Hours": Edit the Opening Hour (I.e. 9:00 AM) AND Closing Hour (I.e. 1:00 PM)

For example, the clinic will operate for half a day.

Step 6: Click on **🖫 Save**

# 18. WHAT IF MY CLINIC IS CLOSED FOR PERSONAL REASON?



You will have to update the operation hour settings.

Step 1: Click on "Administration" and then click on "Settings".

Step 2: Click on "Operating Hours".

***Pro-Tip: (only applicable to clinic with more than 1 branch)***
*Click on "Panel Location" drop-down to select which branch to be edited upon.*

# 18. WHAT IF MY CLINIC IS CLOSED FOR PERSONAL REASON?

⚠ This is a HealthMetrics DEMO website

## Settings

Dashboard / Administration / **Settings**

Email notification | **Operating hours**

**Panel location**

Klinik Kiana Ballard A ⌄

**④** Edit

Normal hours | **Special hours** **③**

Only public holidays for the next 3 months will be displayed in the list below.

| Day ⌄ | Date ⌄ | Hours ⌄ |
|---|---|---|
| Prophet Muhammad's Birthday | 29/10/2020 | Not set |
| Deepavali | 14/11/2020 | Not set |
| Christmas Day | 25/12/2020 | Not set |

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Step 3: Click on    Special hours

Step 4: Then, click on    ✎ Edit

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55

# 18. WHAT IF MY CLINIC IS CLOSED FOR PERSONAL REASON?



Scroll down the page, until you see a "Special hour" section.

Step 5: Fill in the date accordingly.

Step 6: Select "Closed"

**_Pro-Tip: (subsequent "Special hour" will be shown)_**
_You may add more than one "Special hour", following your operation schedule._

After you have done, scroll back the page upwards.

Step 7: Click on **Save**

# More FAQ

1. **Do we need to send hardcopy invoice to your office?**

   No, the invoice is generated automatically in the portal at the end of every month.

2. **What is our payment term with HealthMetrics?**

   45-60 days from the invoice generation date.

3. **Will I get notified on payment related matter?**

   Yes, you will receive a notification email when the payment is made, provided that you have set up the email notification setting.

4. **We have an optician/optometrist in the outlet. How do we add his/her name?**

   You can add in the name and information on "Optician/Optometrist" page.

5. **How long is the claim submission period?**

   It is 24 hours from the member check-in time.

6. **Do all HealthMetrics members have the same entitlement limit and same treatment coverage?**

   No. Our clients have different policies and treatment coverage for every individual. Hence, you have to check-in member in the portal to view the details.

7. **How do I check member's limit/balance?**

   First, check-in the member with IC number. You will be able to view the limit/balance after.

8. **What is "Collect Cash"?**

   It means that you need to collect cash from the member as the treatment given may not be covered by the employer or the total limit has exceeded the entitlement.

# More FAQ

**9.    Do I still need to include uncovered treatment details during claim submission?**

Yes, the employer of the member would want to know the claims details.

**10.    How much is your service charge?**

Our service charge is 10.6% and it is standard for all GP panel nationwide.

**11.    I forgot my password to login. What is next?**

You can click on "Forgot Password" in the Login page. A reset password email will be sent to you.

**12.    Can we check-in a member more than once a day?**

This depends on the balance as well as the visit limit set by their employer.

**13. Does HealthMetrics portal show the updated entitlement for every member?**

Yes, our portal shows the real-time entitlement each time.

**14. What to do if "Member Not Found" is shown in the portal dashboard?**

You may call our 24/7 hotline at +603-7661 6229 to clarify.

**15. About late claim submission request, does it get 100% approved each time? And is there a time limit to submit late claim request?**

The late claim request will be reviewed by client and subjected to approval. The expired check-ins will remain displayed in the Dashboard until dismissed, 10 days have passed or rejected up to 3 times, whichever comes first.