



HealthMetrics

OPTICAL USER GUIDE

24/7 SUPPORT LINE: +603-7661 6229

LIVE CHAT: <http://www.healthmetrics.co>

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1. HOW TO LOGIN?

The screenshot shows the HealthMetrics website interface. At the top, the browser address bar displays 'healthmetrics.co' with a red circle and the number '1' around it. Below the address bar, the website header features a teal navigation bar with a 'BOOK A FREE DEMO' button on the left, a search icon, and 'FIND PANEL' and 'SIGN IN' buttons on the right. The 'SIGN IN' button is circled in red with the number '2'. Below the navigation bar is a main content area with a light blue background. On the left, there is a section titled 'A better benefits experience for all' with a sub-headline 'Join our award-winning cloud enterprise platform to manage your employee benefits & healthcare costs holistically' and a play button icon with the text 'See what our customers say'. The central part of the page features a circular diagram with four nodes: 'Recent Benefit Claims' (listing Dental for -RM 72.00 and Optical for -RM 61.00), 'Your annual benefits balance RM 980', 'Flu vaccination' (checked), and 'Stress therapy' (checked). At the bottom, there is a section titled 'Trusted by brand names' with the text 'Proudly serving over 1000 customers across industries throughout the nation.' and a 'Chat' button.

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

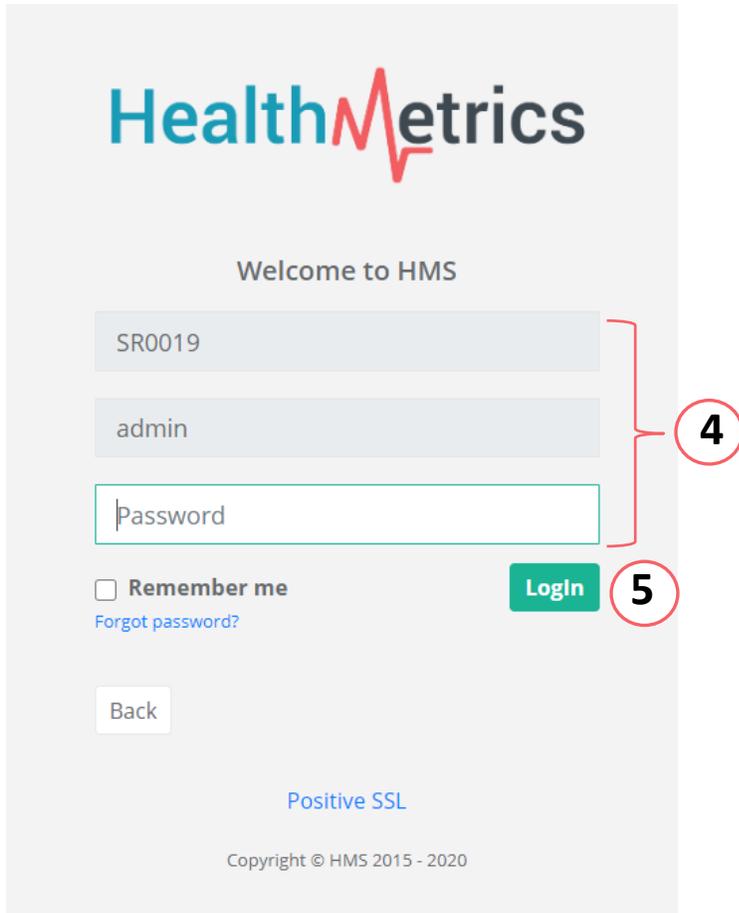


HealthMetrics Members

Members Web App for employees and
dependents



1. HOW TO LOGIN?



The screenshot shows the HealthMetrics login interface. At the top is the HealthMetrics logo. Below it is the text "Welcome to HMS". There are three input fields: the first contains "SR0019", the second contains "admin", and the third is labeled "Password". A red bracket labeled "4" groups these three fields. Below the password field is a checkbox for "Remember me" and a link for "Forgot password?". A green "Login" button is labeled "5" with a red circle. A "Back" button is located below the "Remember me" checkbox. At the bottom, there is a "Positive SSL" indicator and a copyright notice "Copyright © HMS 2015 - 2020".

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.

Administrator [SUN3333] SunMed Clinic

Dashboard

Submitted Patient Visits

0 visit

Cashless Claims Collected

RM 0.00

Average Submission Time

0 minute

Patient Check-Ins

You have expired check-ins!

Latest Submissions

Latest Transactions

Need help? Call us. +60 3-7661 6229 support@healthmetrics.co

Check-in Status	Count
All	2
Active	1
Expired	1

Name	Phone	Time	Status
Chester One	900616-13-8141	7/4/2020 10:11 AM	Expired
Abigail Alvarez	971107-17-2824	9/4/2020 4:36 PM	Expired

Name	Phone	Time	Status
Boon Seng	671219-17-7921	8/3/2020 2:38 PM	Approved
Daisy K	900616-13-8181	7/3/2020 12:50 PM	Pending approval
Boon Seng	671219-17-7921	7/3/2020 12:38 PM	Approved
Daisy K	900616-13-8181	3/3/2020 2:45 PM	Pending approval

Type	ID	Date/Time	Amount
Bill Received	IN-2003-97823-R	1/4/2020 1:52 AM	RM10.60
Claim Invoice	IN-2003-97821-P	1/4/2020 1:52 AM	RM100.00
Bill Received	IN-2002-97793-R	1/3/2020 1:59 AM	RM40.60
Claim Invoice	IN-2002-97792-P	1/3/2020 1:59 AM	RM322.00
Bill Received	IN-1909-97613-R	1/10/2019 12:36 AM	RM42.93

2. HOW DO I GET STARTED?

The screenshot shows the HealthMetrics dashboard interface. On the left is a dark sidebar with a user profile for Bryan Becker and a list of navigation items: Dashboard, Patients, Claims, Opticians/Optometrists, Transactions, Reports, Administration, and Help. The main content area has a top header with a menu toggle (1), a notification bell (2), a language selector for English (3), and a Logout button. Below the header is a yellow announcement banner (2) stating 'This is a HealthMetrics DEMO website'. A dropdown menu (4) is set to 'Klinik Kiana Ballard A'. The main data area shows 'Submitted Patient Visits' (5) with an info icon (5) and a value of '0 visit'. At the bottom, there is a 'Patient Check-Ins' section (6) with a '+ NEW CHECK-IN' button (6), a message 'All cleared, you have no pending check-ins!', and a 'View all check-ins' link. A 'Chat' button is also visible in the bottom right.

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?

The screenshot shows a user interface for a HealthMetrics dashboard. The user is logged in as Bryan Becker. The dashboard displays performance metrics for the current location, Klinik Kiana Ballard A. The metrics are:

- Submitted Patient Visits: 2 visits
- Cashless Claims Collected: RM 105.00
- Average Submission Time: 83 hour(s) 46 minutes
- Average Claim Price Range: RM 90.00 - RM 99.00 (11% from same day last month)

A red bracket and the number 7 highlight these four metrics. Below the metrics, there is a section for Patient Check-Ins, which is currently cleared. The latest submissions are listed below, including details for Shiloh York and Alena Carroll.

7) The  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

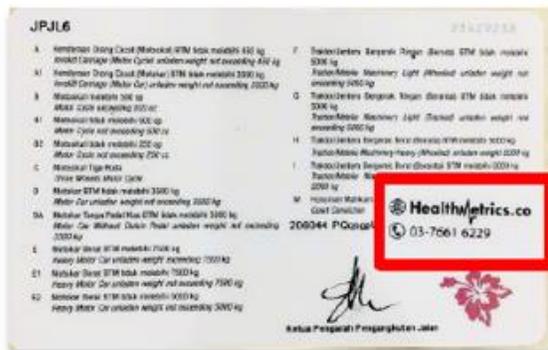
Average Submission Time - for from patient check-in to submission, inclusive of late submissions

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

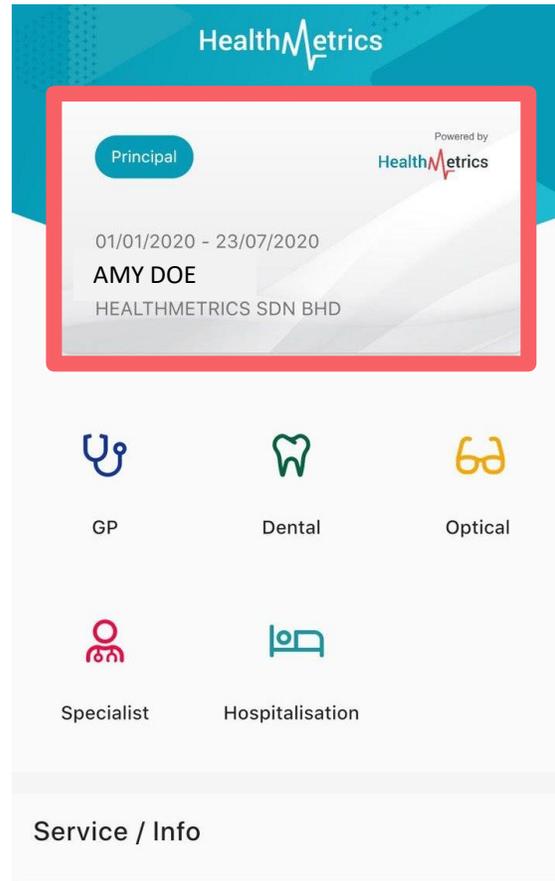
3. HOW TO VERIFY HEALTHMETRICS MEMBER?



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?

The screenshot shows the HealthMetrics dashboard. On the left is a dark sidebar with a user profile for Bryan Becker and a list of navigation items: Dashboard, Patients (highlighted with a red circle and '2'), Claims, Opticians/Optometrists, Transactions, Reports, Administration, and Help. At the bottom of the sidebar is contact information: 'Need help? Call us. +60 3-7661 6229' and 'support@healthmetrics.co'. The main content area has a header with a hamburger menu (highlighted with a red circle and '1'), a notification icon with '5', 'English', and 'Logout'. Below the header is a yellow warning banner: 'This is a HealthMetrics DEMO website'. The main content area is titled 'Patients' and includes the clinic name 'Klinik Delilah Kaur A (Change)', address 'No. 1048, Jalan Shaun Kelley, 50480 Kuala Lumpur, Wilayah Persekutuan Kuala Lumpur, MY', and phone number '+60 157217182'. Below this is a search bar with the placeholder text 'Search patient with IC or passport no.' (highlighted with a red circle and '3') and a search icon. A 'Chat' button is located at the bottom right of the main content area.

Step 1: Click on

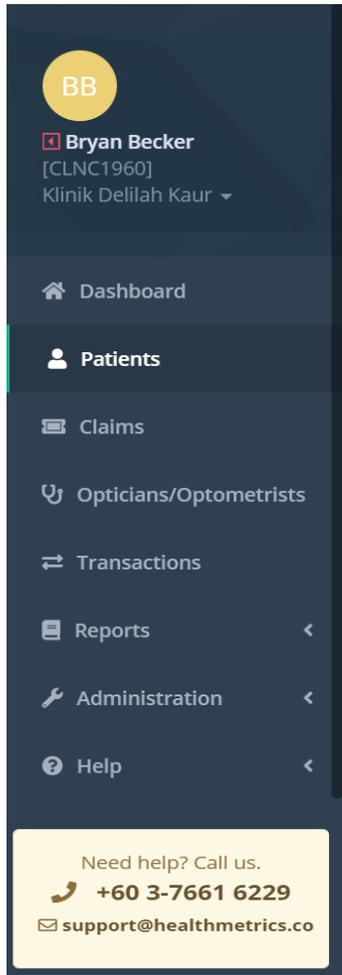


Step 2: Click on “Patients”

Step 3: Insert IC number [Local] or Passport number [Non-Malaysian] and click on



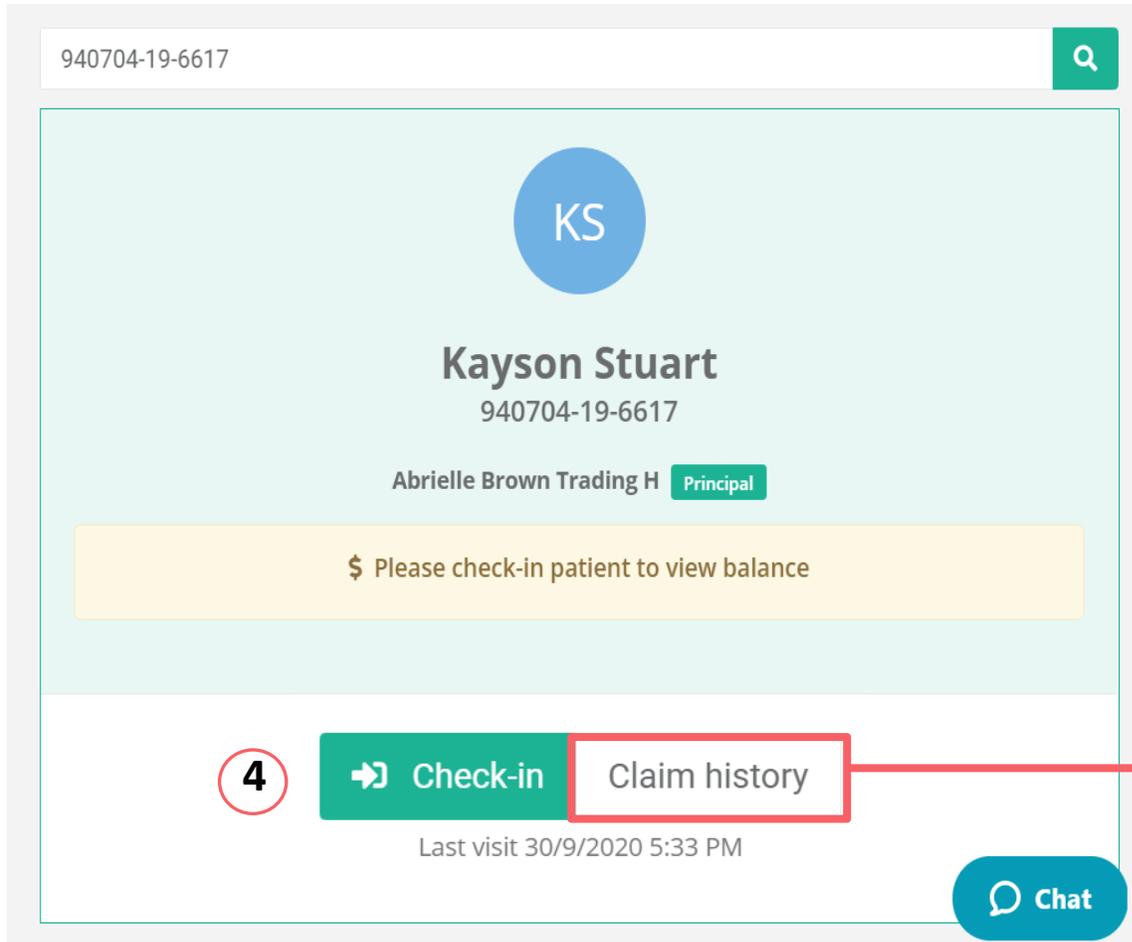
4. HOW TO CHECK-IN PATIENT?



BB
Bryan Becker
[CLNC1960]
Klinik Delilah Kaur

- Dashboard
- Patients
- Claims
- Opticians/Optometrists
- Transactions
- Reports
- Administration
- Help

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support@healthmetrics.co



940704-19-6617

KS

Kayson Stuart
940704-19-6617

Abrielle Brown Trading H **Principal**

\$ Please check-in patient to view balance

4 **Check-in** Claim history

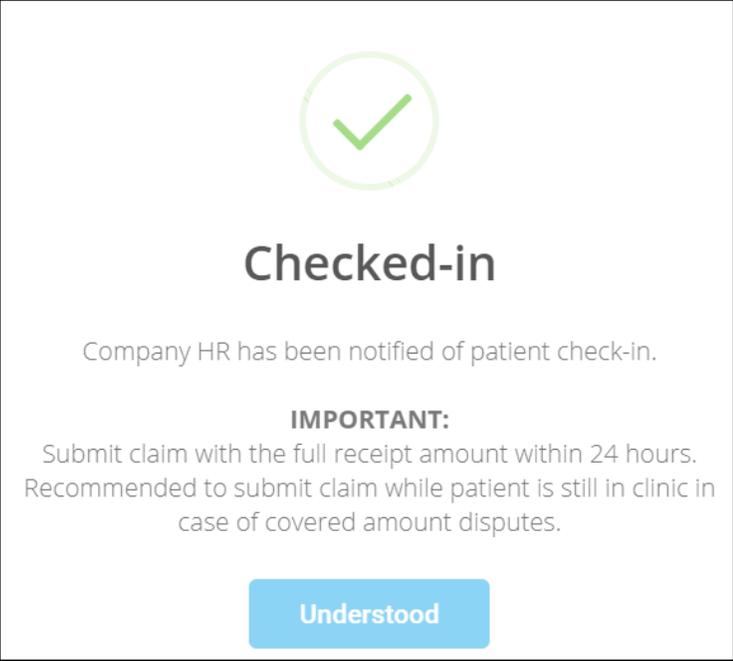
Last visit 30/9/2020 5:33 PM

Chat

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

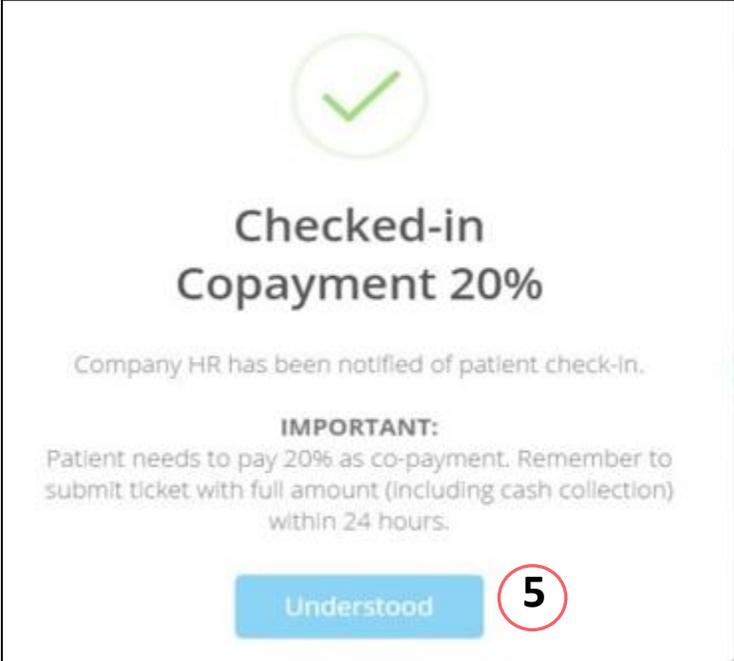
Pro-Tip: The displayed profile includes the previous visit history.

4. HOW TO CHECK-IN PATIENT?



A screenshot of a notification card. At the top is a green checkmark icon. Below it, the text reads "Checked-in". Underneath, it says "Company HR has been notified of patient check-in." followed by an "IMPORTANT:" section: "Submit claim with the full receipt amount within 24 hours. Recommended to submit claim while patient is still in clinic in case of covered amount disputes." At the bottom is a blue button labeled "Understood".

Example 1.1



A screenshot of a notification card. At the top is a green checkmark icon. Below it, the text reads "Checked-in Copayment 20%". Underneath, it says "Company HR has been notified of patient check-in." followed by an "IMPORTANT:" section: "Patient needs to pay 20% as co-payment. Remember to submit ticket with full amount (including cash collection) within 24 hours." At the bottom is a blue button labeled "Understood" with a red circle containing the number "5" next to it.

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 

5. HOW TO SUBMIT CLAIMS?

940704-19-6617

KS

Kayson Stuart
940704-19-6617

Abrielle Brown Trading H **Principal**

RM300.00

Uncovered treatments: Non Prescription Glasses and Non Prescription Contact Lens, Non Prescription Sunglasses

CHECKED-IN
23h 57m 42s

1 **New claim** Claim history

Check-out without claim

Checked-in 9/10/2020 4:40 PM

Chat

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support@healthmetrics.co

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

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**

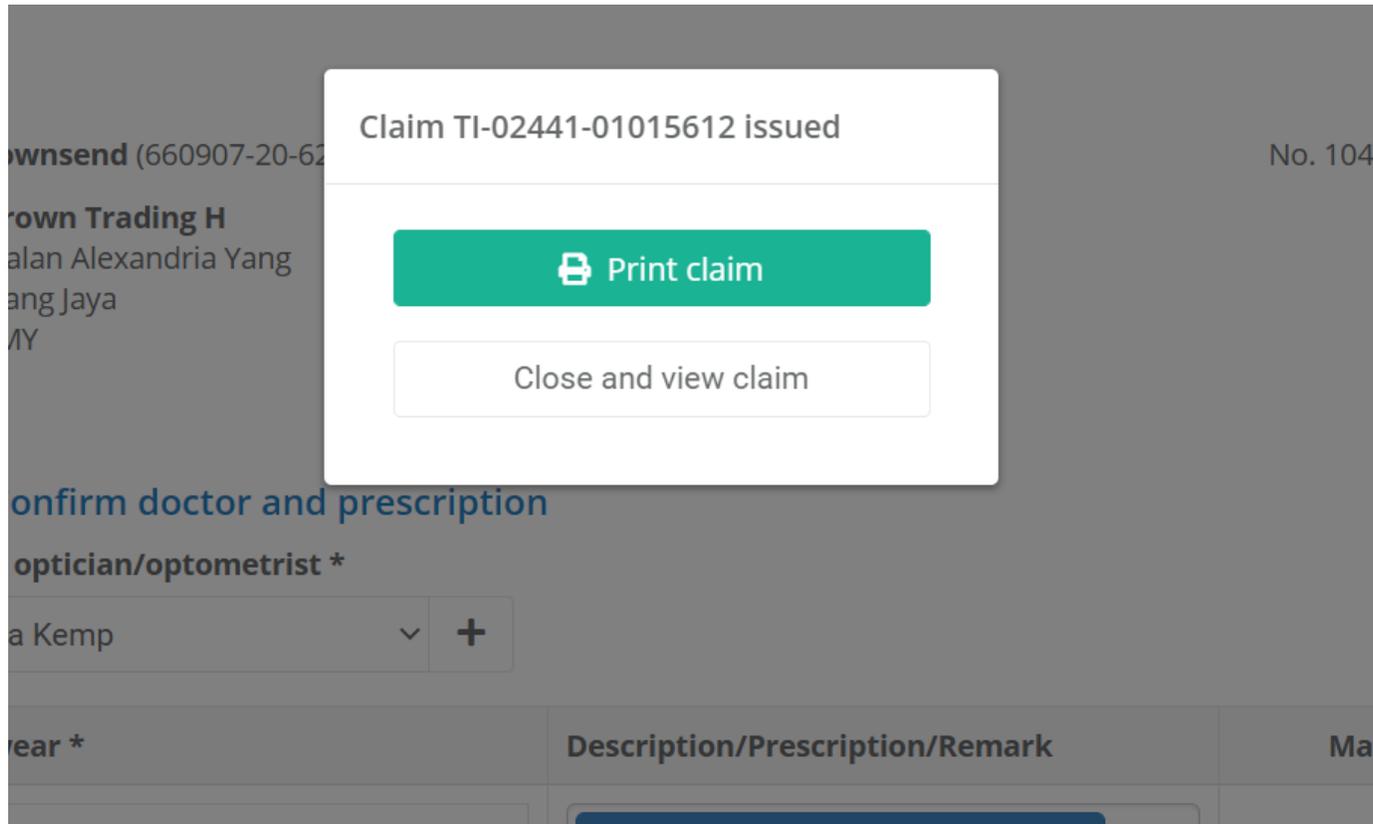
Step 3: Tick to confirm information is accurate

Step 4 : Lastly click 

Pro-Tips:

i) For incomplete claims, you can click on , and return to Dashboard to complete the claim when it is convenient.

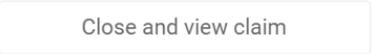
5. HOW TO SUBMIT CLAIMS?



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

Pro-Tips:

i) You can click  to print the ticket or

ii) You can click  to view the claim.

6. HOW TO VIEW MY SUBMITTED CLAIMS?

The screenshot shows the 'Claims' dashboard for Adrienne Ayala. The left sidebar contains navigation options: Dashboard, Patients, Claims (highlighted with a red circle and the number 1), Doctors, Transactions, Reports, Administration, and Help. The main content area has filters for 'Claim date range', 'Claim no.', 'Billing status', and 'MC status'. Below the filters are buttons for 'Print', 'Export to Excel', and 'Search'. A table of claims is displayed with columns for 'Claim date', 'Checked-in time', 'Creation time', and 'Claim no.'. The first row of the table is highlighted with a red box, and a red circle with the number 2 is placed over the 'View' button in the first column of that row. A 'Chat' button is visible at the bottom right of the table area.

	Claim da..	Checked-in time	Creation time	Claim no.
View	9/4/2020	9/4/2020 10:21 AM	9/4/2020 5:48 PM	TI-011-01014063
View	26/2/2020	26/2/2020 9:42 AM	26/2/2020 9:55 AM	TI-011-0963682
View	3/2/2020	3/2/2020 12:08 PM	3/2/2020 12:27 PM	TI-011-0924230
View	28/1/2020	28/1/2020 12:00 PM	28/1/2020 12:04 PM	TI-011-0914510
View	28/1/2020	28/1/2020 11:52 AM	28/1/2020 11:58 AM	TI-011-0914492
View	13/1/2020	13/1/2020 9:49 AM	13/1/2020 9:54 AM	TI-011-0891227
View	7/1/2020	7/1/2020 4:31 PM	7/1/2020 4:43 PM	TI-011-0883836
View	31/12/2019	31/12/2019 4:15 PM	31/12/2019 4:23 PM	TI-011-0875480
View	30/12/2019	30/12/2019 4:14 PM	30/12/2019 4:22 PM	TI-011-0872747

Step 1: Click on “Claims”

Step 2: Choose any desired submitted claims, then click on [View](#)

6. HOW TO VIEW MY SUBMITTED CLAIMS?

Claims

Dashboard / Claims / TI-02441-01015606

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.

7. HOW TO EDIT THE SUBMITTED CLAIMS?

Claims

Dashboard / Claims

Claim date range

Claim no.

Billing status

MC status

Show advanced filters

Print Export to Excel Search

	Claim da..	Checked-in time	Creation time	Claim no.
View	9/4/2020	9/4/2020 10:21 AM	9/4/2020 5:48 PM	TI-011-01014063
View	26/2/2020	26/2/2020 9:42 AM	26/2/2020 9:55 AM	TI-011-0963682
View	3/2/2020	3/2/2020 12:08 PM	3/2/2020 12:27 PM	TI-011-0924230
View	28/1/2020	28/1/2020 12:00 PM	28/1/2020 12:04 PM	TI-011-0914510
View	28/1/2020	28/1/2020 11:52 AM	28/1/2020 11:58 AM	TI-011-0914492
View	13/1/2020	13/1/2020 9:49 AM	13/1/2020 9:54 AM	TI-011-0891227
View	7/1/2020	7/1/2020 4:31 PM	7/1/2020 4:43 PM	TI-011-0883836
View	31/12/2019	31/12/2019 4:15 PM	31/12/2019 4:23 PM	TI-011-0875480
View	30/12/2019	30/12/2019 4:14 PM	30/12/2019 4:22 PM	TI-011-0872747

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support@healthmetrics.co

Chat

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

Dashboard / Claims / TI-02441-01015606

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

Step 3: Scroll down the page and click on

Edit

< Back

Edit

3

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
☎: +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	
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

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.

7. HOW TO EDIT THE SUBMITTED CLAIMS?

Step 1: Confirm doctor and prescription

Attending optician/optometrist *

Ms Hana Kemp

#	Max amount	Amount *
1	9999	180
2	9999	60
3	9999	60

Total : RM240.00

Collect cash : RM240.00

Covered amount : RM0.00

Chat

Step 7: Input the reason/explain

Step 8: Click on



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

The screenshot shows the HealthMetrics user interface. On the left is a dark sidebar with a navigation menu. The 'Opticians/Optometrists' menu item is highlighted and circled with a red '1'. The main content area is titled 'Opticians/Optometrists' and includes a breadcrumb 'Dashboard / Opticians/Optometrists'. A yellow banner at the top reads 'This is a HealthMetrics DEMO website'. Below the title, there is a green button '+ Create new optician/optometrist' circled with a red '2'. A table below contains one row for 'Dr Hana Kemp' with columns for Name, MMC registration, Permanent status, and Creation date. A 'Chat' button is visible at the bottom right.

	Name	MMC registrati..	Permanent ..	Creation da..
Actions	Dr Hana Kemp			13/3/2019

Step 1: Click on “Opticians/ Optometrist”

Step 2: Click on 

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

Create new optician/optometrist

Choose doctor type

Permanent Locum

Name *

Panel locations

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

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

The screenshot displays the user interface for managing opticians. The sidebar on the left contains a navigation menu with items: Dashboard, Patients, Claims, **Opticians/Optometrists** (highlighted with a red circle '1'), Transactions, Reports, Administration, and Help. The main content area is titled 'Opticians/Optometrists' and includes a 'Create new optician/optometrist' button. Below this is a table with the following data:

	Name	MMC registrati...	Permanent	Creation date
2 	Dr Hana Kemp			13/3/2019

The 'Actions' dropdown menu for 'Dr Hana Kemp' is open, showing 'Edit' and 'Delete' options.

Step 1: Click on "Opticians/Optometrists"

Step 2: Click on  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**

Step 3: Make any necessary changes

Step 4: Click on 

3

4

10. HOW TO VIEW THE TRANSACTION SUMMARY?

Transaction type

Transaction no.

Status

Print Export to Excel

Search

	Date	Transaction type	Transaction n..Y	Balar
Actions	31/8/2020	Service charge credit note	CR-2008-34019...	-RM
Actions	31/8/2020	Claim credit note	CR-2008-34019...	-RM
Actions	30/4/2020	Service charge bill	IN-2004-337622...	RM
Actions	30/4/2020	Claim invoice	IN-2004-337619...	RM
Actions	27/3/2020	Service charge payment	PY-2003-330891...	RM
Actions	27/3/2020	Claim payment	PY-2003-330...	
Actions	28/2/2020	Service charge payment	PY-2002-3096...	

Step 1: Click on "Transaction"

Step 2: Select the desired transaction type

Step 3: Click on 

10. HOW TO VIEW THE TRANSACTION SUMMARY?

Transaction type: Claim invoice

Transaction no.:

Date range:

Status: All

Amount: RM

Print Export to Excel Search

	Date	Transaction type	Transaction n.	Balance
Actions	30/4/2020	Claim invoice	IN-2004-337619...	RM111.
		Claim invoice	IN-2002-304100...	RM213.
		Claim invoice	IN-2001-293281...	RM0.00
		Claim invoice	IN-1912-277065...	RM0.00
		Claim invoice	IN-1911-267973...	RM0.00
		Claim invoice	IN-1910-253623	
Actions	30/9/2019	Claim invoice	IN-1909-242347...	

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

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

10. HOW TO VIEW THE TRANSACTION SUMMARY?

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	Amount
Klinik Kiana Ballard A	R

Chat

This is an example of an invoice.

11. HOW TO VIEW THE PAYMENT STATUS?

Transactions

Dashboard / Transactions

Generate statement

Transaction type: All

Transaction no.:

Date range:

Status: All

Amount: RM

Print Export to Excel Search

	Date	Transaction no.	Transaction no.	Balance	Total	Status
Actions	31/8/2020	Service char...	CR-2008-340...	-RM1.59	-RM1.59	
Actions	31/8/2020	Claim credit ...	CR-2008-340...	-RM15.00	-RM15.00	
Actions	30/4/2020	Service char...	IN-2004-337...	RM11.77	RM11.77	
Actions	30/4/2020	Claim invoice	IN-2004-337...	RM111.00	RM111.00	
Actions	27/3/2020	Service char...	PY-2003-330...	RM0.00	RM60.95	

Step 1: Click on "Transactions"

11. HOW TO VIEW THE PAYMENT STATUS?

RM

Print Export to Excel Search

	Date	Transaction type	Transaction No.	Balance	Total	Status
Actions	27/3/2020	Claim payment	PY-2003-330...	RM0.00	RM575.00	
Actions	28/2/2020	Service charge payment	PY-2002-309...	RM0.00	RM67.63	
Actions	28/2/2020	Claim payment	PY-2002-309...	RM0.00	RM620.00	
Actions	29/2/2020	Service charge bill	IN-2002-304...	RM22.58	RM22.58	Open
Actions	29/2/2020	Claim invoice	IN-2002-304...	RM213.00	RM213.00	Open
Actions	7/2/2020	Service charge payment	PY-2002-298...	RM0.00	RM46.64	
Actions	7/2/2020	Claim payment	PY-2002-298...	RM0.00	RM362.08	
Actions	31/1/2020	Service charge bill	IN-2001-293...	RM0.00	RM60.95	Closed
Actions	31/1/2020	Claim invoice	IN-2001-293...	RM0.00	RM575.00	Closed
Actions	8/1/2020	Service charge payment	PY-2001-282...	RM0.00	RM20.14	
Actions	8/1/2020	Claim payment	PY-2001-282...	RM0.00	RM190.00	

1 / 6 20 items per page 1 - 20 of 114 items

Chat

Step 2: View the invoice status in the table.

2

To note:

The status of successful payment will be shown as **Closed**

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

11. HOW TO VIEW THE PAYMENT STATUS?

Klinik Kiana Ballard

Amount paid **RM575.00**

Payment date 27/3/2020

Payment method Bank transfer

Reference number RD349113

Remark

Outstanding transactions

Description	Date	Original amount	Payment
Invoice IN-2001-293281-P	31/1/2020	575.00	575.00

Amount to apply : RM575.00

Amount paid : RM575.00

[← Back](#)

[Chat](#)

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?

The screenshot displays the HealthMetrics user interface. On the left is a dark sidebar with a navigation menu. The 'Dashboard' item is circled in red with the number '1'. At the bottom of the sidebar, a yellow box contains contact information, and the 'New claim' button is circled in red with the number '2'. The main content area shows the current location as 'Klinik Delilah Kaur A', a 'Submitted Patient Visits' section with '1 visit', and a 'Patient Check-Ins' section with a 'NEW CHECK-IN' button and filters for 'All 1', 'Active 1', and 'Expired 0'. A patient entry for 'Brantley Fields' is shown with a timer and a progress bar. At the bottom of the patient entry, there are two buttons: 'New claim' and 'Check-out without claim'.

Step 1: Click on "Dashboard"

Step 2: Click on [New claim](#)

12. HOW TO COMPLETE THE PENDING 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 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 3: Fill in the sections accordingly
- Select attending optician/optometrist
 - Select eyewear
 - Description/Prescription /Remark
 - Amount charged

Step 4: Tick to confirm

Step 5: Click on

Step 2 : Confirm information and submit

I confirm the information here is correct

4

Cancel

5

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

This is a HealthMetrics DEMO website

Users
Dashboard / Administration / Users

Export to Excel + Create new user

Search ...

	User name	Name	Roles	Email ad
Actions	admin	Adrienne Ayala	Admin	admin

Chat

10 items per page 1 - 1 of 1 items

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

Step 2: Click on



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

Create new user

User information Roles **1**

Name *
Ms Hannah

Email address

User name * **3**

Default panel location

Active

Auto-generate password

Let me create the password

Should change password on next login **4**

Cancel Save

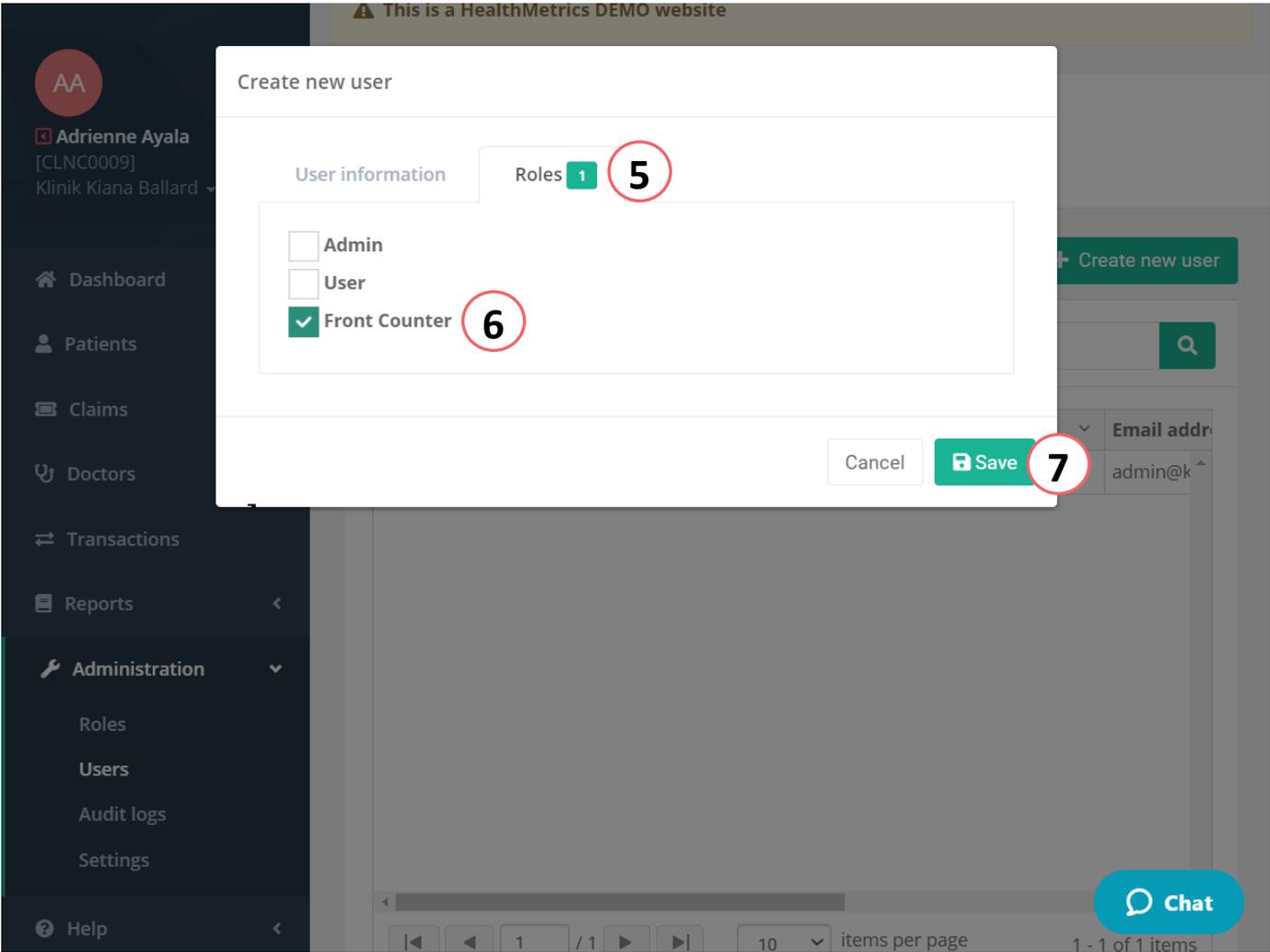
Step 3: Input the following details

- 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 

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

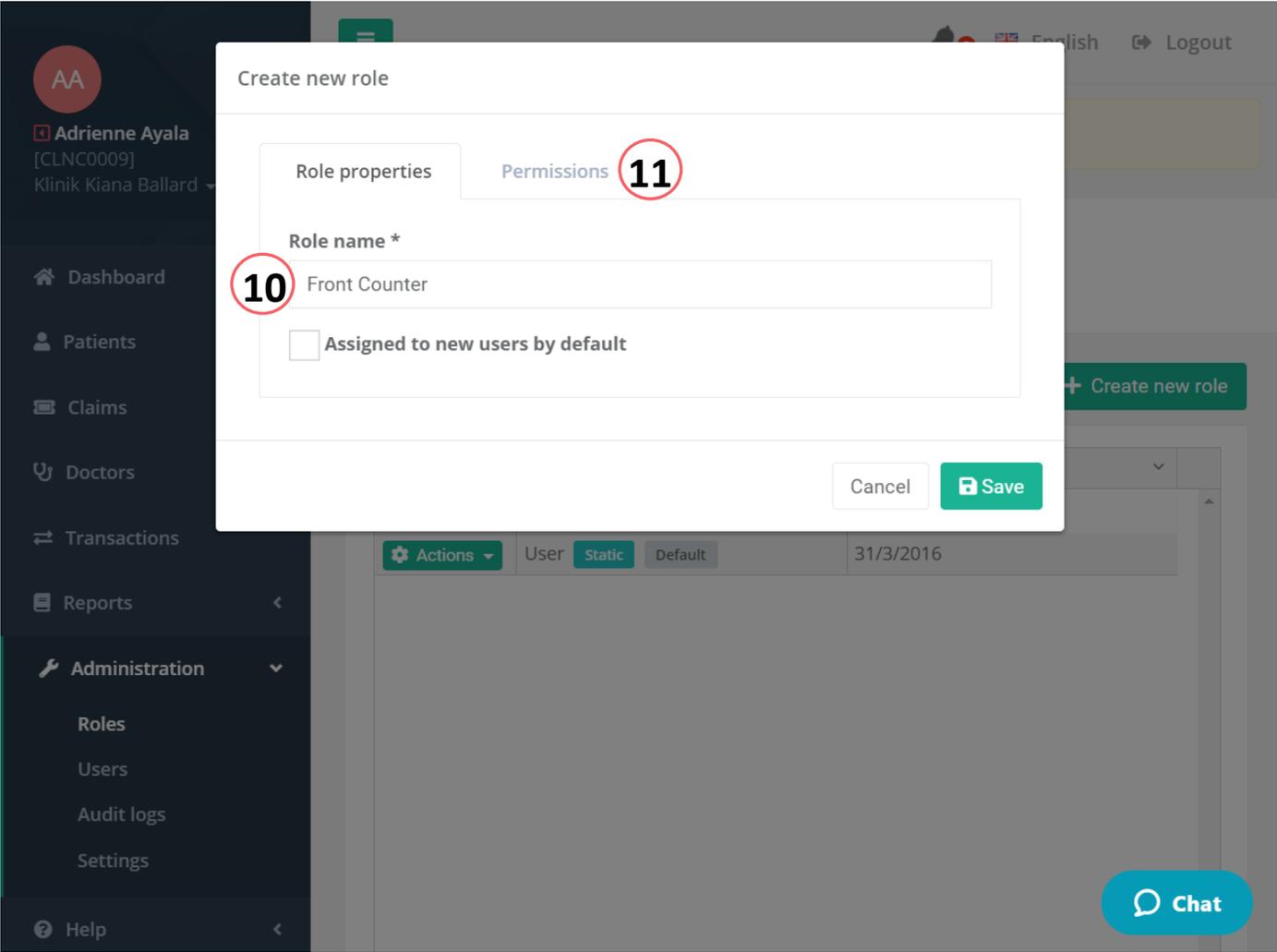
The screenshot shows the HealthMetrics user interface. On the left is a dark sidebar with a navigation menu. The 'Administration' menu item is circled with a red circle containing the number '8'. The main content area is titled 'Roles' and shows a table of existing roles. A green button labeled '+ Create new role' is circled with a red circle containing the number '9'. The table has columns for 'Role name' and 'Creation date'. There are two rows: 'Admin' and 'User', both with 'Static' roles and a creation date of '31/3/2016'. The 'User' row also has a 'Default' role listed.

	Role name	Creation date
Actions	Admin Static	31/3/2016
Actions	User Static Default	31/3/2016

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

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

Create new role

Role properties Permissions

Search ...

- Transactions
- Tickets
 - Create new patient ticket
 - Edit patient ticket
- Patients
- Reports
 - Check-in report
- Doctors
 - Create new doctor
 - Edit doctor
 - Delete doctor
- Administration
 - Audit logs
 - Roles
 - Create new role
 - Edit role

Expand all Collapse all

Cancel Save Chat

Step 12: Tick to allow access to which permission setting

Step 13: Click on  Save

14. IS THERE A MANUAL USER GUIDE?

The screenshot displays the HealthMetrics web application interface. On the left is a dark sidebar menu with the following items: Doctors, Transactions, Reports, Administration, and Help. The 'Help' item is highlighted with a red circle and the number '1'. Below 'Help' are sub-items: Panel manual, Intro to help, Manage doctors, Attend patients, Check tickets, Check transactions, Manage roles, and Manage users. At the bottom of the sidebar is a yellow box with contact information: 'Need help? Call us. +60 3-7661 6229' and 'support@healthmetrics.co'. The main content area shows a top navigation bar with a notification bell (5), 'English', and 'Logout'. Below this is a yellow warning banner: 'This is a HealthMetrics DEMO website'. A dropdown menu for 'Current location' is set to 'Klinik Kiana Ballard A'. The main content area displays 'Submitted Patient Visits' with a '1 visit' card. At the bottom, there is a 'Patient Check-Ins' section with a 'NEW CHECK-IN' button and a red error message: 'You did not submit claims in time! Expired check-ins are shown here for 10 days. You may request for late submission, subject to...'. A 'Chat' button is visible in the bottom right corner.

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?

The screenshot shows the HealthMetrics interface. On the left is a dark sidebar with a user profile for Bryan Becker and a navigation menu. The 'Dashboard' item is circled in red with the number '1'. The main content area is titled 'Patient Check-Ins' and features a red warning banner: 'You did not submit claims in time'. Below this, there are filters for 'All' (2), 'Active' (1), and 'Expired' (1). The first entry is for Alena Carroll, with an 'EXPIRED - ACTION REQUIRED' status and a green 'Request late claim' button circled in red with the number '2'. The second entry is for Colt Steele, with a progress bar and a '18h 32m 37s left' timer. A 'View all check-ins' link is at the bottom.

Step 1: Click on "Dashboard"

Step 2: Under "Patient Check-Ins" widget, click on 

15. HOW DO I SUBMIT A LATE CLAIM?

Expired check-ins are shown here for 10 days. You may request for late submission, subject to approval.

Request late claim

It is important to let company HR know of illness and MC days as soon as possible. Before proceeding to submission, provide a reason for late submission.

Panel staff name
Ms Elli

Actual visit date
03/09/2020

Reason

- Please explain
- Internet issue**
- Forgot to submit
- Person-in-charge unavailable
- Unsure how to use/access system
- Too many patients/busy
- New Person-in-charge/no proper handover
- Others

Need help? Call us. +60 3-7661 6225
support@healthmetrics.co

Chat

Step 3: Fill in the details such as

- Panel staff name
- Reason of late claim

Choose “others” if the reason is not listed.

15. HOW DO I SUBMIT A LATE CLAIM?

Expired check-ins are shown here for 10 days. You may request for late submission, subject to approval.

AA

Adrienne Ayala
[CLNC0009]
Klinik Kiana Ballard

Dashboard

Patients

Claims

Doctors

Transactions

Reports

Administration

Help

Need help? Call us.
+60 3-7661 6225
support@healthmetrics.co

Chat



Request late claim

It is important to let company HR know of illness and MC days as soon as possible. Before proceeding to submission, provide a reason for late submission.

Panel staff name

Actual visit date

Reason

4

Step 4: Click on

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

I confirm the information here is correct

7

Cancel

8

Clear all

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

Copyright © Chat

Step 5: Fill in the treatment details section

Step 6: Check the total amount

Step 7: Tick to confirm

Step 8: Click on

16. HOW TO EDIT OUR OPERATING HOURS?

Adrienne Ayala
[CLNC0009]
Klinik Kiana Ballard

Dashboard Patients Claims Doctors Transactions Reports Administration Roles Users Audit logs Settings Help

Need help? Call us.
+60 3-7661 6229

This is a HealthMetrics DEMO website

Settings
Dashboard / Administration / Settings

Email notification Operating hours **2**

Panel location
Klinik Kiana Ballard A

Edit

Normal hours Special hours

Day	Hours
Sunday	9:00 AM - 1:00 PM
Monday	9:00 AM - 6:00 PM
Tuesday	9:00 AM - 6:00 PM
Wednesday	9:00 AM - 6:00 PM
Thursday	9:00 AM - 6:00 PM

Chat

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?

[CLNC1960]
Klinik Delilah Kaur

Dashboard
Patients
Claims
Opticians/Optometrists
Transactions
Reports
Administration
Roles
Users
Audit logs
Settings
Help

Need help? Call us.
+60 3-7661 6229

This is a HealthMetrics DEMO website

Settings

Dashboard / Administration / Settings

Email notification | Operating hours

Panel location
Klinik Kiana Ballard A

3 Normal hours | Special hours

4 Edit

Day	Hours
Sunday	9:00 AM - 1:00 PM
Monday	9:00 AM - 6:00 PM
Tuesday	9:00 AM - 6:00 PM
Wednesday	9:00 AM - 6:00 PM
Thursday	9:00 AM - 6:00 PM

Chat

Step 3: Click on 

Step 4: Then, click on 

16. HOW TO EDIT OUR OPERATING HOURS?

Email notification | Operating hours

Panel location
Klinik Kiana Ballard A
Make sure to save changes before choosing another location.

6 Save Cancel

Normal hours | Special hours

Schedule #1 Delete

Sun Mon Tue Wed Thu Fri Sat

Hours | Open 24 hours | Closed

09:00 AM	🕒	---	01:00 PM	🕒	🗑️
02:00 PM	🕒	---	06:00 PM	🕒	🗑️

Add hours

Schedule #2 Delete

Chat

Step 5: Complete the schedule information:

- Opening day
- Select "Closed" / "Open 24 Hours" / to set your own setting, click on "Hours".
- 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?

This is a HealthMetrics DEMO website

Settings

Dashboard / Administration / Settings

Email notification | Operating hours **2**

1 Administration

Panel location

Klinik Kiana Ballard A

Edit

Normal hours | Special hours

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

Day	Date	Hours
Prophet Muhammad's Birth...	29/10/2020	Not set
Deepavali	14/11/2020	Not set
Christmas Day	25/12/2020	Not set

Chat

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?

⚠ 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

Chat

Step 3: Click on **Special hours**

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

17. HOW TO UPDATE OPERATION HOUR FOR PUBLIC HOLIDAY?

The screenshot displays the 'Operating hours' configuration page in the HealthMetrics system. The user is Bryan Becker, logged in as 'Klinik Delilah Kaur'. The interface is divided into a sidebar and a main content area. The sidebar contains navigation options: Dashboard, Patients, Claims, Opticians/Optometrists, Transactions, Reports, Administration (Roles, Users, Audit logs, Settings), and Help. The main content area has two tabs: 'Email notification' and 'Operating hours'. Under 'Operating hours', there is a 'Panel location' dropdown set to 'Klinik Kiana Ballard A'. Below this, there are 'Normal hours' and 'Special hours' buttons. The 'Special hours' button is highlighted with a red circle and the number 5. The 'Special hours' section shows a holiday named 'Prophet Muhammad's Birthday' on the date '29/10/2020'. Underneath, there are three radio buttons: 'Hours' (selected), 'Open 24 hours', and 'Closed'. Below the radio buttons, there is a time range input showing '09:00 AM' to '01:00 PM'. There is also an 'Add hours' button and a 'Clear' button. At the bottom right, there is a 'Chat' button.

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.

17. HOW TO UPDATE OPERATION HOUR FOR PUBLIC HOLIDAY?

Email notification | Operating hours

Panel location
Klinik Kiana Ballard A
Make sure to save changes before choosing another location.

6 Save Cancel

Normal hours | Special hours

Prophet Muhammad's Birthday Clear

Date
29/10/2020

Hours | Open 24 hours | Closed

09:00 AM 01:00 PM

Add hours

Deepavali
Date

Chat

Step 6: Click on



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

The screenshot shows the HealthMetrics interface. On the left is a dark sidebar with a navigation menu. The 'Administration' menu item is circled with a red '1'. The main content area is titled 'Settings' and has a breadcrumb trail: 'Dashboard / Administration / Settings'. The 'Administration' tab is selected, and the 'Operating hours' sub-tab is circled with a red '2'. Below the sub-tabs, there is a 'Panel location' dropdown menu with 'Klinik Kiana Ballard A' selected, highlighted by a red box. To the right of the dropdown is a green 'Edit' button. Below this is a yellow warning box: 'Only public holidays for the next 3 months will be displayed in the list below.' Underneath is a table with columns 'Day', 'Date', and 'Hours'. The table contains three rows of public holidays. At the bottom right of the main content area is a blue 'Chat' button.

Day	Date	Hours
Prophet Muhammad's Birth...	29/10/2020	Not set
Deepavali	14/11/2020	Not set
Christmas Day	25/12/2020	Not set

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

Chat

Step 3: Click on

Special hours

Step 4: Then, click on

Edit

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

Settings
Dashboard / Administration / Settings

Email notification | Operating hours

Panel location
Klinik Kiana Ballard A
Make sure to save changes before choosing another location.

Save Cancel

Normal hours | **Special hours**

Special hour
Date range

Custom range 24/9/2020 30/9/2020
Apply Cancel

Sep 2020							Oct 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5	27	28	29	30	1	2	3
6	7	8	9	10	11	12	4	5	6	7	8	9	10
13	14	15	16	17	18	19	11	12	13	14	15	16	17
20	21	22	23	24	25	26	18	19	20	21	22	23	24
27	28	29	30	1	2	3	25	26	27	28	29	30	

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

Step 5: Fill in the date accordingly.

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

Special hour Delete

Date range

24/9/2020 - 30/9/2020

Hours Open 24 hours **Closed** 6

Special hour

Date range

Hours Open 24 hours Closed

Operating hours not set

Step 6: Select "Closed"

Pro-Tip: (subsequent "Special hour" will be shown)

You may add more than one "Special hour", following your operation schedule.

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

Email notification | **Operating hours**

Panel location

Klinik Kiana Ballard A

Make sure to save changes before choosing another location.

7 Save Cancel

Normal hours | **Special hours**

Special hour Delete

Date range

24/9/2020 - 30/9/2020

Hours | Open 24 hours | **Closed**

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.