

Your
HOME in
CGM MEDEDI

Billing and Practice Management

TASK ORGANISER
TRAINING MANUAL

brought to you by



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Introducing the Task Organiser

Our CGM MEDEDI Task Organiser is a central space to track practice performance, access tools you often use and discover add-on features. Integrated with the core MEDEDI app, it keeps you up-to-date with the latest claim responses, outstanding patient invoices, online appointments, patient registrations and other electronic remittance advice notifications.

Installing the MEDEDI Task Organiser

The CGM MEDEDI Task Organiser is available to download from the CGM Customer Portal.

1. Simply log into the CGM Customer Portal, navigate to Page Updates / Product Updates / Plugins and look for the “Task Organiser”.
2. Download and double-click to launch the Update Manager.
3. Once activated, the Task Organiser will be available when you log back into CGM MEDEDI.

Using the new Task Organiser for the first time

1. Open CGM MEDEDI and enter your login information to log in.
2. The following screen (figure 1) will be displayed.

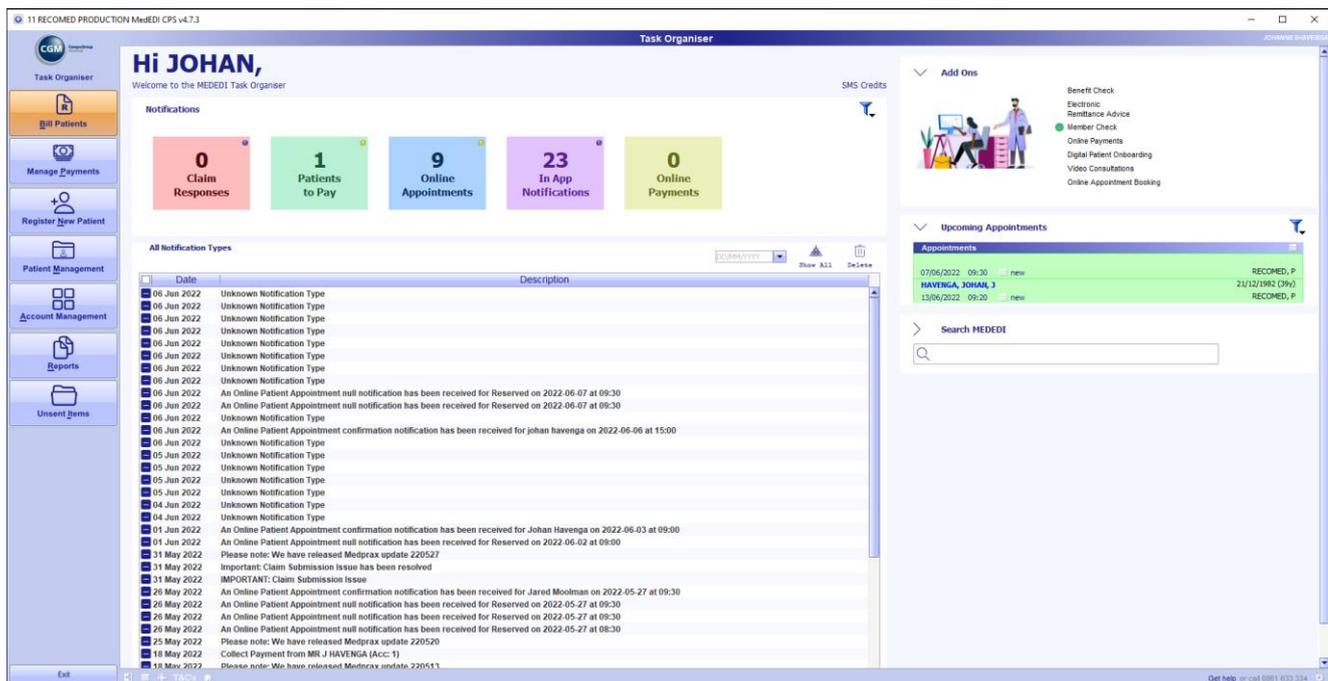


Figure 1. Designed for purpose, the Task Organiser streamlines and arranges your practice workflow smartly so that you and your team focus on what needs to be done, when and how to get it done. Let's take a detailed look at each component visible on the new Task Organiser screen.

Navigation



The navigation panel situated to the left of the Task Organiser includes a recognisable icon and updated label for each tool to make it easier to get around:

- Bill Patients replaces Bill / Debit Patient, allowing the user to select the particular patient to bill screen
- Manage Payments replaces Record / Allocate Payments,
- Register New PPatients remains the same,
- Patient Management replaces View / Change Patient Details,
- Account Management replaces View Account Info, letting the user choose a particular patient account,
- Reports replace View / Print Reports,
- and Unsent Items retain the same label.

Welcome Bar

The welcome bar on top of the screen greets you by first name, as captured during registration (Logon Password Process). To the right, you will see how many SMS credits your practice has available if you are registered for SMS's with CGM.

Interested in registering for SMS's no problem, simply click on "SMS Credits" to be re-routed to the SMS portal where you can sign up for the service.

Notifications

Get a snapshot of upcoming appointments and the status of what's paid, pending, or due in the notifications block.



Select up to 6 notification types to display here, including:

- Claim Responses - the system-generated response once a claim has been submitted,
- Patients to Pay - the amount still due by a patient once a bill has been settled,
- Electronic Remittance Advice (ERA) - latest remittance advice received (activation required),
- Online Appointments - online appointments made via RecoMed (activation required),
- Online Patient Registrations - completed Medme patient information forms (activation required),
- In-app Notifications - any messages sent from CGM MEDEDI to the practice.
- Online Payment Notifications – Payments Received from Patients using the QR Payment links

Filter which notifications you'd like to see in the notifications block below from the dropdown menu.

Notifications

0
Claim Responses

1
Patients to Pay

0
ERA

8
Online Appointments

0
Online Registrations

23
In App Notifications

- Claim Responses
- Patients to Pay
- Electronic Remittance Advice
- In App Notifications
- Online Appointments
- Online Registrations
- Online Payments Notifications

By default, notifications are sorted by Date. You can also Show All, Hide Read, Show Read or even Delete items. For bulk deletion of Read items, select multiple items and press the Delete button.

Claim Responses, Patients to Pay, Online Appointments Clear	
Date	Description
<input checked="" type="checkbox"/> 01 Jun 2022	An Online Patient Appointment confirmation notification has been received for Johan Havenga on 2022-06-03 at 09:00
<input type="checkbox"/> 01 Jun 2022	An Online Patient Appointment null notification has been received for Reserved on 2022-06-02 at 09:00
<input checked="" type="checkbox"/> 01 Jun 2022	An Online Patient Appointment null notification has been received for Reserved on 2022-06-02 at 09:00
<input type="checkbox"/> 01 Jun 2022	An Online Patient Appointment pending notification has been received for Johan Havenga on 2022-06-02 at 08:00
<input checked="" type="checkbox"/> 26 May 2022	An Online Patient Appointment confirmation notification has been received for Jared Moolman on 2022-05-27 at 09:30
<input checked="" type="checkbox"/> 26 May 2022	An Online Patient Appointment null notification has been received for Reserved on 2022-05-27 at 09:30
<input checked="" type="checkbox"/> 26 May 2022	An Online Patient Appointment null notification has been received for Reserved on 2022-05-27 at 09:30
<input checked="" type="checkbox"/> 26 May 2022	An Online Patient Appointment null notification has been received for Reserved on 2022-05-27 at 08:30
<input checked="" type="checkbox"/> 18 May 2022	Collect Payment from MR J HAVENGA (Acc: 1)

MEDEDI Add-ons

Explore the features which help you to get the most out of CGM MEDEDI. You'll find these at the top right of the screen. Not immediately available, these value-added services can be activated to enhance your practice workflow. Click on the image or label to learn more or register for a service.



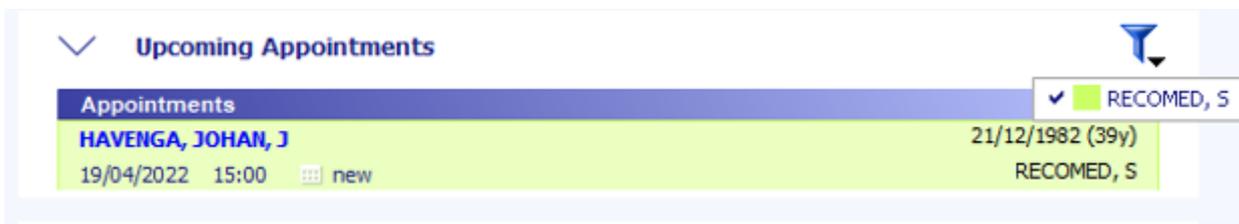
Add Ons

- Benefit Check
- Electronic Remittance Advice
- Member Check
- Online Payments
- Digital Patient Onboarding
- Video Consultations
- Online Appointment Booking

Allocate medical aid payments fast & accurate to outstanding accounts ...[Learn more](#)

Upcoming Appointments

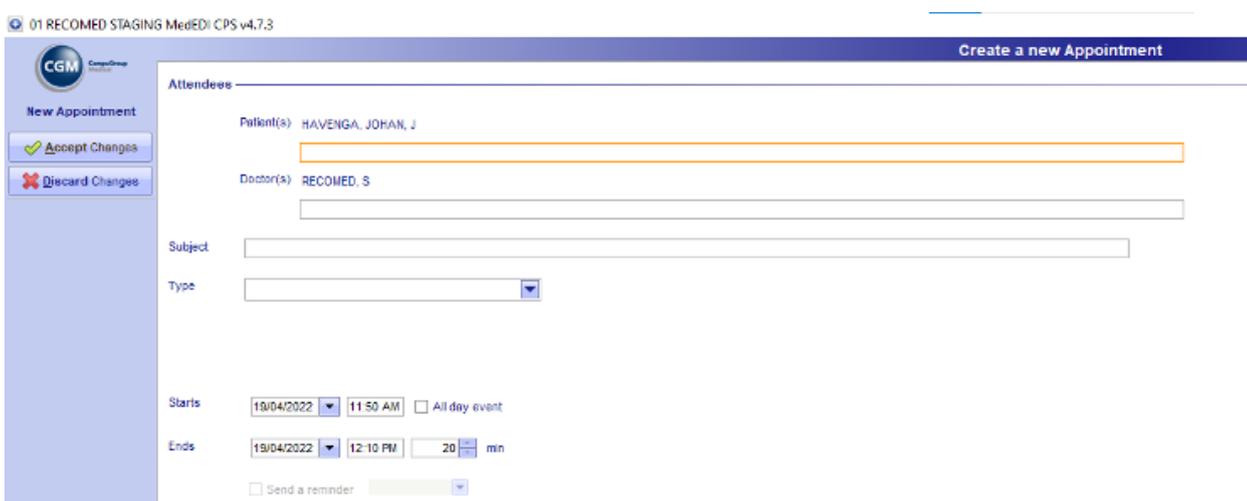
View upcoming appointments for each of the doctors in the practice beneath the MEDEDI Add-ons, on the right of the screen. Toggle between multiple diaries using the funnel button and select the practitioner you wish to view - the name of the doctor will be displayed in the lower right corner of the displayed appointment. You can even customise the colour of each doctor's calendar for a complete view of the practice schedule.



Create a new appointment by simply clicking the “new” shortcut on any appointment.

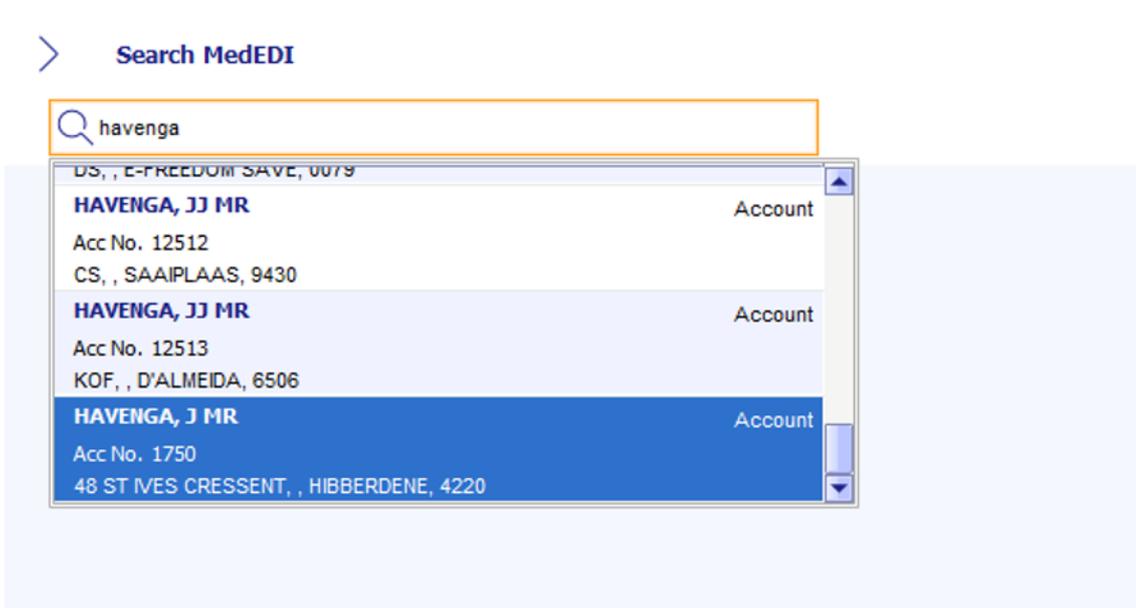


From here you can insert details and customise the date and time on the new appointment screen. To return to the Task Organiser, simply click on “Accept Changes”.



Patient Search

Use the powerful patient search to look up any patient by name, account number and other criteria.



Select the patient to display their patient card. From here you can quickly update patient details, review account credits or payments due. You can also sms or email patients directly from here by simply clicking on the cell phone number or email address. The selected patient card will also display any future appointments scheduled.

Search MedEDI

havenga

Account Holder	
HAVENGA, J MR	
48 ST IVES CRESENT HIBBERDENE 4220	
DISCOVERY	8548646464
0621886834	johanneshavenga@gmail.com
Account Details	
Outstanding R 0.00	Credits R 0.00
File ref:	Acc no. 1750
Patients	
MR JOHANH HAVENGA	1982-12-21 (39y)

View or change details by selecting **the patient name**, or perform the following actions:

- View or change the account information, by selecting the **account name**,
- Contact the patient by **cell number** or **email**,
- Open the records or allocate payments, by selecting **outstanding**,
- Allocate payments by selecting **credits**.

Billing from the Task Organiser Search function is also available, once you have searched and selected the patient you will see the following options:

Patient	Private Bill  New Bill 
HAVENGA, JOHAN MR	
	 notes
'''	
MOMENTUM LESOTHO	11111111
0621886834	johanneshavenga@gmail.com
Account	
Outstanding R 20919.80	Credits R -400.59
File ref:	Acc no. 1
Appointments	
22/11/2022 16:00	RECAMED, P

Private Bill will open the Private Billing screen where the patient will be billed as private.

New Bill will open the billing screen where you will be able to bill the patient and submit the bill to their Medical Aid.

Get Help

Have questions or need a hand? Click on the Get Help link on the bottom right of your screen and one of our friendly agents will be in touch. Alternatively, call 0861 633 334 or email us on help.za@cgm.com to chat to one of our friendly Customer Support agents.

Practice Name : RECOMED PRODUCTION

Contact : Tel :

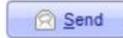
To

Message :

Good Morning,

Please assist me with a Patient query on account 1563, Patient needs to be moved to their own account.

Regards
Johan Havenga

 Send

And there you have it! In just a few steps you can start ticking off your practice to-dos - all from one place in CGM MEDEDI.

Good for business, Great for patient care.