My Workplace Health
Software Solutions by 2CRisk

healthbank

WORLD VISION INTERNATIONAL

Instructional training on changes to new application

OVERVIEW

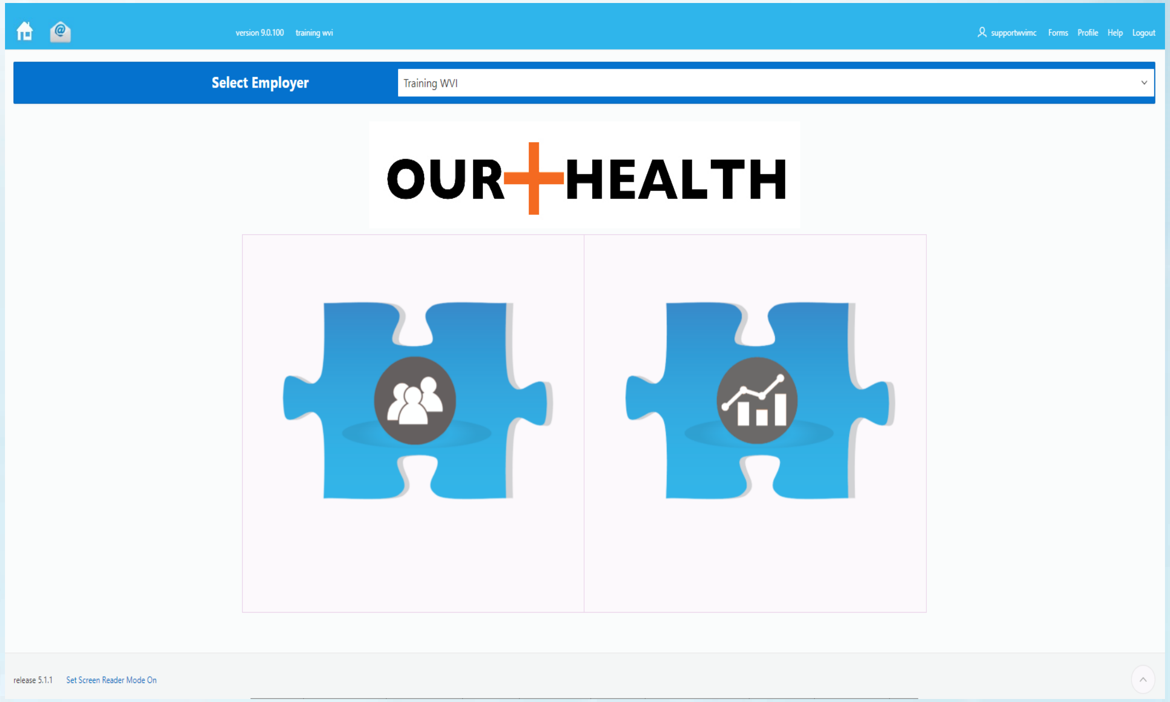
- The new Health Bank application is replacing the Health Wallet component of the Health Cloud.
- Most of the features of the old Health Wallet application can still be found in the new Health Bank application.
- The new features of the Health Bank application have been designed to make the tracking of health spending easier, simpler and more efficient.

KEY CHANGES

- New simplified and easy to use interfaces on several of the Health Bank application pages.
- The ability to add breakdowns to a cost, showing exactly where resources have been used.
- Costs can now be edited, allowing for old costs to be adjusted and mistakes to be easily fixed.
- Charts and reports have been changed to be more interactive and better represent the data.

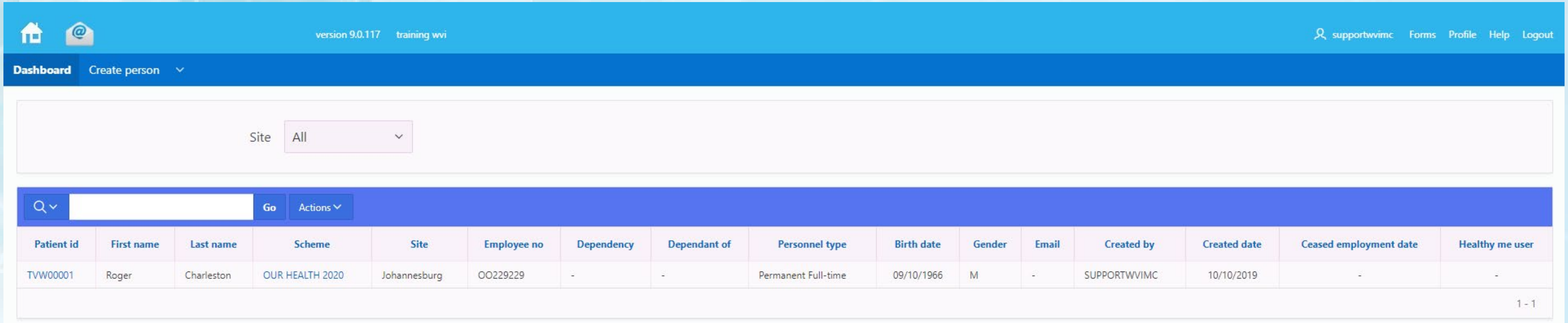
HOME PAGE

- As seen here, the home page of the application has been simplified and features two options.
- The left option allows you to manage cost records and employees.
- The right option allows you to view the available reports and charts
- The home option at the top left of the application lets you get back to this page easily from any page in the application.



DASHBOARD - MANAGING EMPLOYEE LISTINGS

- The dashboard shows a full list of the employees and their dependants that are registered with the application.
- Employees and their dependants can be registered via the *create person* button at the top left of the screen.
- Personnel can be filtered by site, using the drop down list at the top of the screen.
- Personnel details can be edited by clicking on their **Patient ID**.
- To add or view costs of a person, click on their **Scheme**.

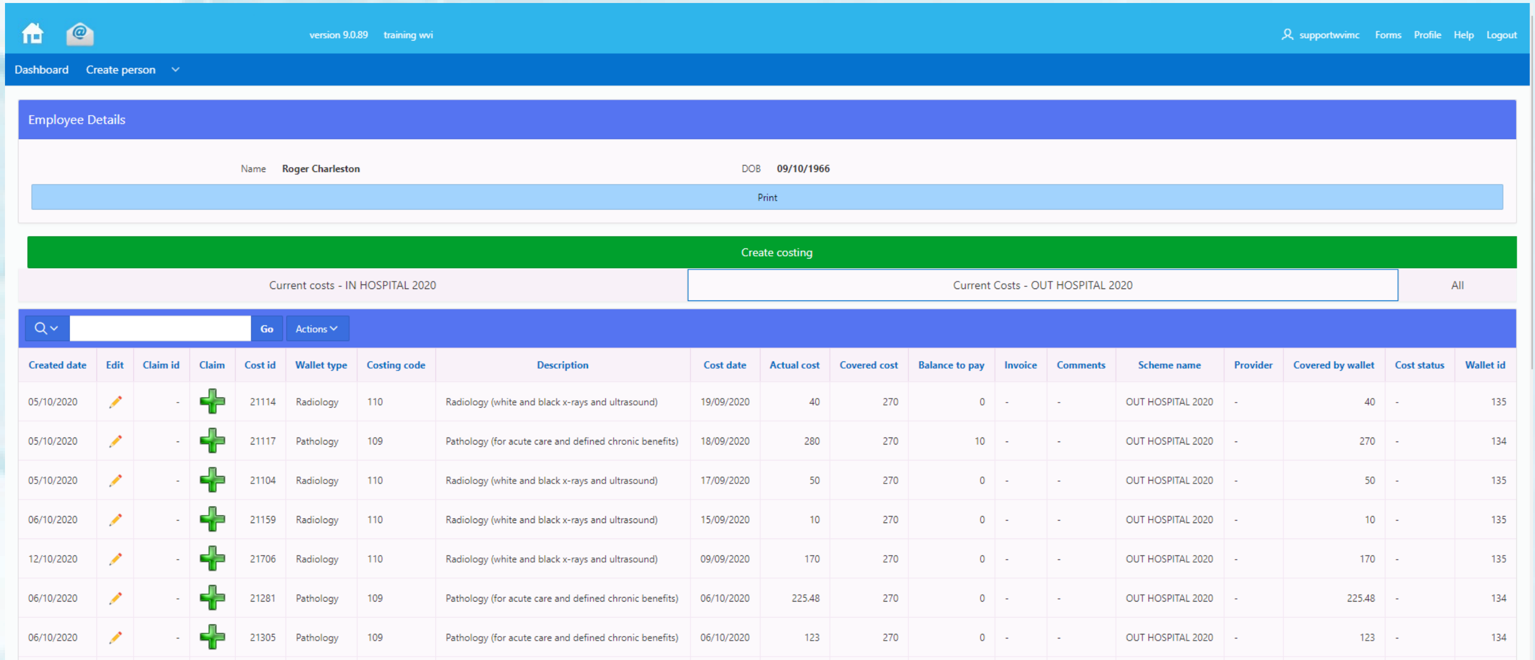


COSTS

- This page shows the costs of the selected person.
- Their current costs can be printed out with the print button.
- The current costs displayed can be changed by selecting the tabs above the costs list.
- Below the costs list, there are multiple reports on the individual’s costs and current scheme information.

COSTS

- Costs that belong to the old scheme can be found under the **Old Schemes** tab, with a full history available.
- Costs can be created by clicking the **Create costing** button.



Created date	Edit	Claim id	Claim	Cost id	Wallet type	Costing code	Description	Cost date	Actual cost	Covered cost	Balance to pay	Invoice	Comments	Scheme name	Provider	Covered by wallet	Cost status	Wallet id
05/10/2020		-		21114	Radiology	110	Radiology (white and black x-rays and ultrasound)	19/09/2020	40	270	0	-	-	OUT HOSPITAL 2020	-	40	-	135
05/10/2020		-		21117	Pathology	109	Pathology (for acute care and defined chronic benefits)	18/09/2020	280	270	10	-	-	OUT HOSPITAL 2020	-	270	-	134
05/10/2020		-		21104	Radiology	110	Radiology (white and black x-rays and ultrasound)	17/09/2020	50	270	0	-	-	OUT HOSPITAL 2020	-	50	-	135
06/10/2020		-		21159	Radiology	110	Radiology (white and black x-rays and ultrasound)	15/09/2020	10	270	0	-	-	OUT HOSPITAL 2020	-	10	-	135
12/10/2020		-		21706	Radiology	110	Radiology (white and black x-rays and ultrasound)	09/09/2020	170	270	0	-	-	OUT HOSPITAL 2020	-	170	-	135
06/10/2020		-		21281	Pathology	109	Pathology (for acute care and defined chronic benefits)	06/10/2020	225.48	270	0	-	-	OUT HOSPITAL 2020	-	225.48	-	134
06/10/2020		-		21305	Pathology	109	Pathology (for acute care and defined chronic benefits)	06/10/2020	123	270	0	-	-	OUT HOSPITAL 2020	-	123	-	134

CREATING A COST

- This page has been condensed down and simplified compared to the old Health Wallet application, with the ability to add cost breakdowns now available. The result is much easier to use.
- To create a cost first enter the date the cost occurred in the **Cost Date** field. It is always easier to use the interactive calendar to select a date.
- Following, select from the available schemes and then wallets.
- For costs that fall within the old scheme, select the description as usual and enter the actual cost as well as the other relevant details.

CREATING A COST

- When adding a cost that belongs to the new scheme, you may be able to add breakdowns.
- If a cost is eligible for breakdowns, after the description is selected an **Add Breakdowns** button will appear.
- If necessary, change the date of the breakdown.
- Select a breakdown type and enter a cost.
- Click the **Save breakdown** button to add the breakdown to the cost.

CREATING A COST

- The remaining balance and actual cost will be automatically updated, and will update the balances across the application after being saved.
- The breakdowns can now be seen and easily show what has been contributed to the cost. This prevents the need to create a new cost every time, making it easier to keep track of health spending.
- Breakdowns can also be deleted from a cost by clicking their trash icon.
- Remember to always click **Save** when you are finished with or have edited a cost.

EDITING A COST

- Costs can be edited by clicking on the pencil icon underneath the **Edit** column.
- From this page, costs can be adjusted by either adding or removing breakdowns or adjusting the actual cost if no breakdowns are used.
- Costs can be deleted by clicking the **Delete** button in the top left corner of the page.
- Remember to always click **Save** if you have edited a cost in any way.

EDITING A COST ON AN OLD SCHEME

- Costs from old schemes can also be edited.
- This can be done by scrolling down on the costs page and selecting the **Old Schemes** button.
- Next, click the **View History** button and then, the **Edit** button.
- From here, costs can be edited as normal.
- Once finished, click the **Return to Current scheme** button to go back to the current cost page.

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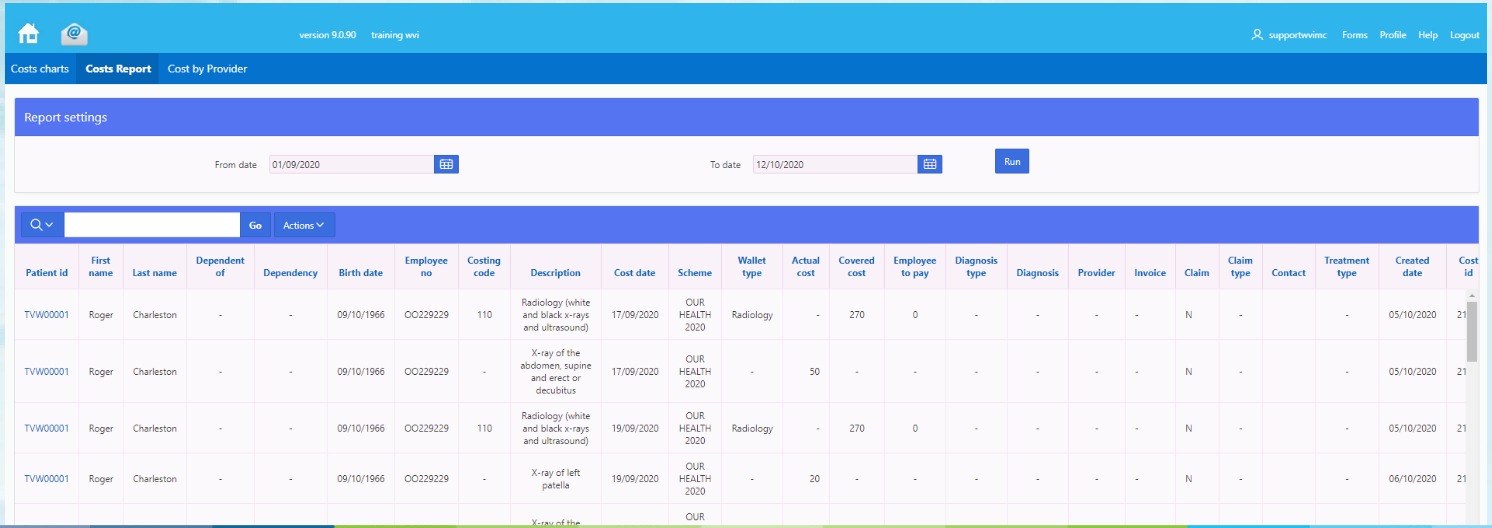
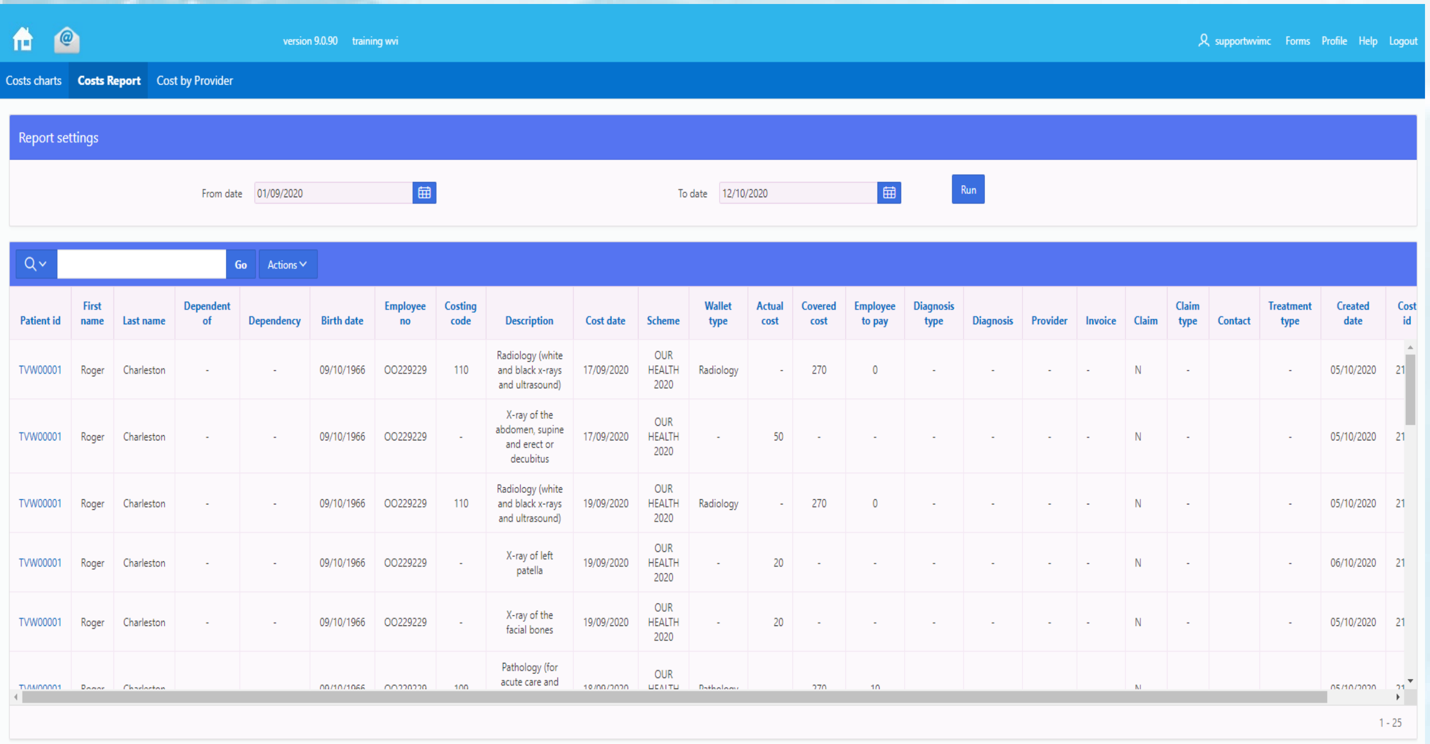
REPORTING

- The reporting section of the application still looks similar, with a few small changes to make it easier to see where costs are coming from.
- There are still the same three options for viewing reporting, Costs Report, Cost Charts and Cost by Provider.



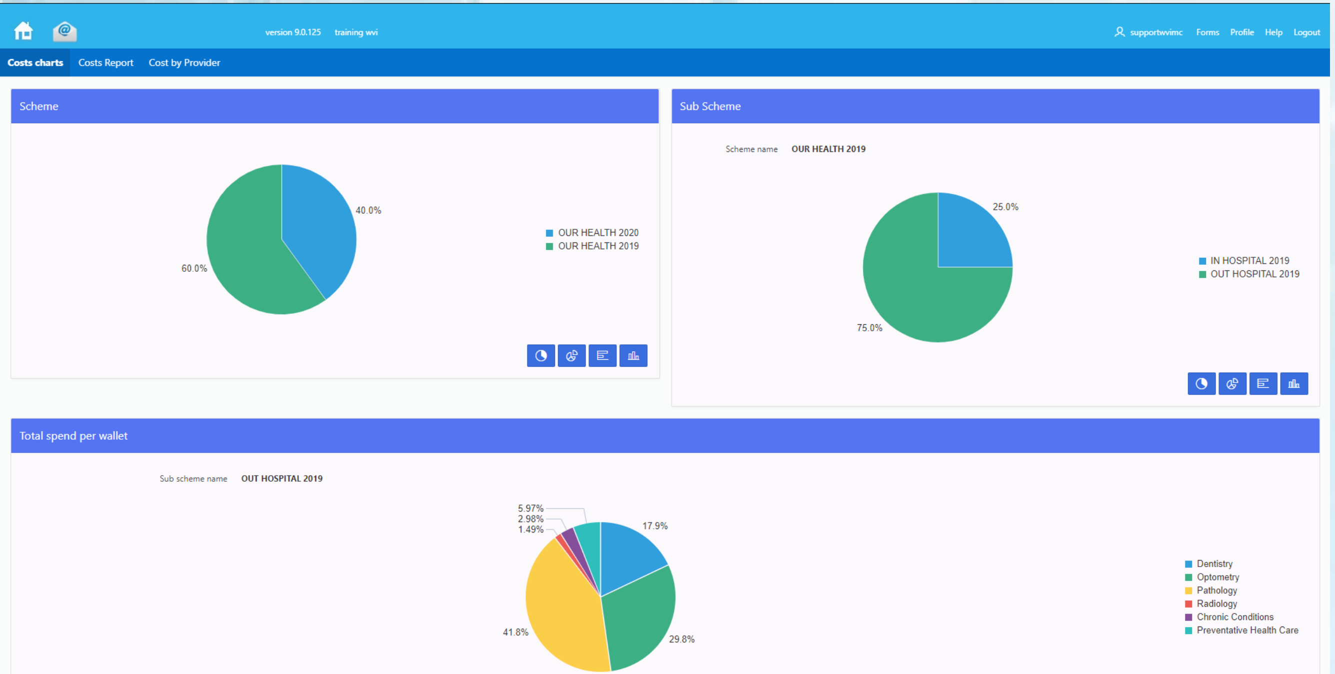
Patient id	First name	Last name	Dependent of	Dependency	Birth date	Employee no	Costing code	Description	Cost date	Scheme	Wallet type	Actual cost	Covered cost	Employee to pay	Diagnosis type	Diagnosis	Provider	Invoice	Claim	Claim type	Contact	Treatment type	Created date	Cost id
TVW00001	Roger	Charleston	-	-	09/10/1966	00229229	110	Radiology (white and black x-rays and ultrasound)	17/09/2020	OUR HEALTH 2020	Radiology	-	270	0	-	-	-	-	N	-		-	05/10/2020	21
TVW00001	Roger	Charleston	-	-	09/10/1966	00229229	-	X-ray of the abdomen, supine and erect or decubitus	17/09/2020	OUR HEALTH 2020	-	50	-	-	-	-	-	-	N	-		-	05/10/2020	21
TVW00001	Roger	Charleston	-	-	09/10/1966	00229229	110	Radiology (white and black x-rays and ultrasound)	19/09/2020	OUR HEALTH 2020	Radiology	-	270	0	-	-	-	-	N	-		-	05/10/2020	21
TVW00001	Roger	Charleston	-	-	09/10/1966	00229229	-	X-ray of left patella	19/09/2020	OUR HEALTH 2020	-	20	-	-	-	-	-	-	N	-		-	06/10/2020	21

COSTS REPORTS



- This report page shows all the costs for the organisation from a given date range.
- To use the report, select two dates using the interactive calendars and the click **Run**.
- The report now shows the breakdowns as costs, if a cost has them, underneath the overall cost.

COSTS CHARTS



- The charts on this page are now more interactive and easier to use.
- All charts can be displayed in four different formats, using the icons in the bottom left corner of the charts section.
- Sections can also be hidden from the chart to make comparing specific data easier.

COSTS CHARTS

- To use the charts, first click on the parent scheme section of the chart under the **Scheme** section.
- Following, click on the sub scheme of the chart under the **Sub Scheme** section.
- The total spend per wallet for chart will now display, showing where the most resources are being spent for the sub scheme.
- To view where costs are occurring for a wallet, click on the desired wallet under the **Total spend per wallet** chart and the Wallet spend per moth chart will display.

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COST BY PROVIDER

- The costs by provider page is very similar to the old page, so using it is very easy for those who have used the old application.