

# MedVision



**Member Information Management**



**Electronic Document Management**



**Customer Relationship Management**



**Compliancy Automation**



**Business Intelligence**

**TAB IT Solutions cc**

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# Member Information Management

**Capture Member** Personal Details, Dependant Details, Medical aid policy details

**"Client Centric"** design - all information is shown as it relates to a particular client.

**Capture once**, then reuse information.

**Link cases** to brokers for performance measurement and commission calculations.

**Create dynamic filters** on your client base e.g Show All members for a particular broker on a particular scheme for a period. Filters can be saved for instant reuse.

**Export** to CSV

**Visual indication** of Application status and Membership status.

**Access to system** is recorded and logged.

**Multiple User levels** ensures confidential data is protected.

Surname	I.D. Number	Gen	Membership?	Application Status	Broker	Region	A	C	F	L	M
MOGAKO	2792887599	F	Accepted	ACCEPTED	CADKOR	CAPE TOWN					
SUBHAGISA	33819572573	F	Accepted	ACCEPTED	VAN GRAAN	CAPE TOWN					
KRUGER		M	Pending	SUBMITTED	HECTOR	CAPE TOWN					
MBULAWI		M	Pending	SUBMITTED	HECTOR	CAPE TOWN					
SEERS	2574179	M	Accepted	ACCEPTED	VAN GRAAN	CAPE TOWN					
SOLIMANI		M	Pending	SUBMITTED	HECTOR	CAPE TOWN					
JANUARY		M	Pending	SUBMITTED	JOHNSON	CAPE TOWN					
PIILAY	2792889186	M	Accepted	ACCEPTED	CADKOR	CAPE TOWN					
GEORAS	0324736369	M	Accepted	ACCEPTED	HECTOR	CAPE TOWN					
MHENZA		M	Pending	SUBMITTED	HECTOR	CAPE TOWN					
BOLNEY	18392388	F	Accepted	ACCEPTED	HECTOR	CAPE TOWN					
KUPISO		F	Pending	ACCEPTED	VAN GRAAN	CAPE TOWN					
VALLIE		M	Pending	SUBMITTED	CADKOR	CAPE TOWN					
GRIFF		M	Pending	SUBMITTED	VOSTER	CAPE TOWN					
YOKA	4790292857	M	Accepted	ACCEPTED	CADKOR	CAPE TOWN					
ALLIE	0324774345	F	Accepted	ACCEPTED	VOSTER	CAPE TOWN					
WANZA		F	Pending	SUBMITTED	JOHNSON	CAPE TOWN					
BURKINS	0324770400	M	Accepted	ACCEPTED	VOSTER	CAPE TOWN					
CLARENCE		M	Pending	SUBMITTED	HECTOR	CAPE TOWN					
VALENTINE	2792901806	F	Accepted	ACCEPTED	VAN GRAAN	CAPE TOWN					
SAVAGE	4790291432	F	Accepted	ACCEPTED	VAN GRAAN	CAPE TOWN					
STERNY	2792810660	M	Accepted	ACCEPTED	VOSTER	CAPE TOWN					
MANGALI		M	Pending	SUBMITTED	VOSTER	CAPE TOWN					
MACTAYE		F	Pending	SUBMITTED	VOSTER	CAPE TOWN					
LEEMAN	2792895739	F	Accepted	ACCEPTED	VOSTER	CAPE TOWN					



# Electronic Document Management

# tabit Solutions

**3 Click scanning** system is easy to learn and use

**Scanned Documents** automatically converted to PDF and filed.

Documents are **filed by member ID** number.

**Document repository** is available in other programs as well.

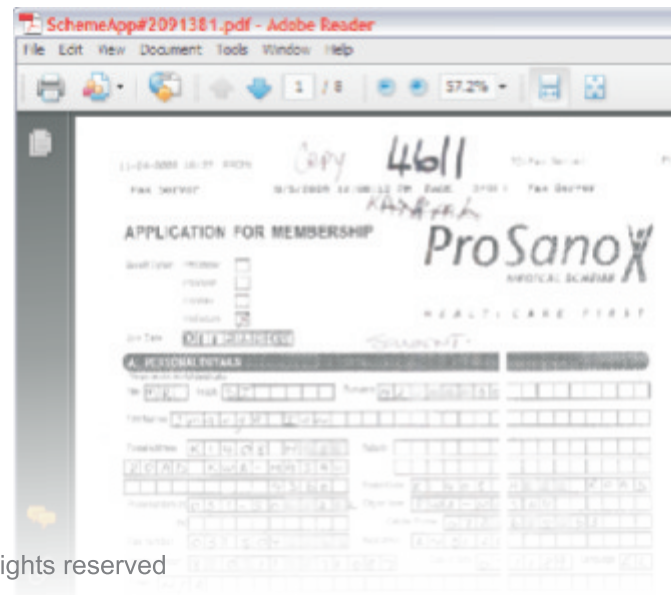
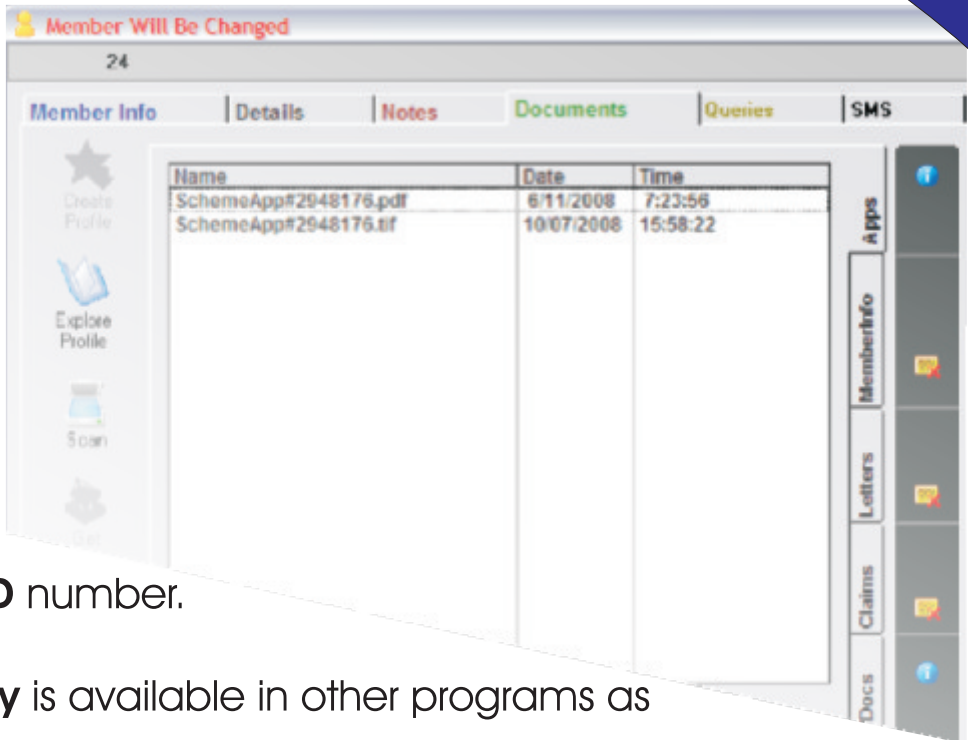
Documents can be **easily emailed** as attachments.

**No limit** to document types that can be stored.

**Supports DUPLEX** and Auto Document Feeders

Most **TWAIN** Scanners supported.

**Folders** for Application Forms, Member Info (Id's, Payslips etc), Claims, Letters and FAIS Documents.





# Customer Relationship Management

✍ Log Member Queries and quickly generate reports showing activity for period.

✍ Generate reports with summaries per Paypoint, per Scheme or per Period (Date)

✍ Multiple Staff members can attend to one Query ensuring increased customer service levels.

✍ Brokers can log service visits to Paypoints.

✍ Managers can monitor the progress of Queries and the rate of query closures.

✍ Scanning of Claims to Document Management System while logging queries.

✍ SMS query status to clients.

Code	Opened	Query	Member	OpenedBy	QueryStatus	Priority	Type
22/12/08		NEW ACCOUNT	MF	VATACIA	OPEN	INFO	CLAIM
22/12/08		UNPAID ACCOUNT	NC	squzana	CLOSED	INFO	CLAIM
22/12/08		Outstanding account	RI	TRACY	OPEN	INFO	CLAIM
22/12/08		DEPENDANT REGISTRATION	SC	ANGELIN	CLOSED	INFO	APPLICA
22/12/08		ACCEPTANCE LETTER	SL	CHRIS	OPEN	INFO	CLAIM
22/12/08		UNPAID ACCOUNT	SA	E MALIK	OPEN	INFO	CLAIM
22/12/08		CONFIRMATION OF MEMBERSH	SE	EDA	CLOSED	INFO	MEMBER
22/12/08		REFUND	SC	JN DIANE	CLOSED	INFO	CLAIM
22/12/08		CLAIM	TH	CK	CLOSED	INFO	CLAIM
23/12/08		MEMBERSHIP CERTIFICATE	TH	TRONEL	CLOSED	INFO	MEMBER
23/12/08		ADDING A DEPENDANT	VA	squzana	CLOSED	INFO	APPLICA
23/12/08		NEW ACCOUNT	VA	F FATIM	OPEN	ASAP	CLAIM
23/12/08		SUSPENSION OF MEMBERSHIP	VE	RTUS	CLOSED	INFO	MEMBER
23/12/08		AUTHORIZATION NUMBER	WI	IS	CLOSED	INFO	LEAD
23/12/08		OUTSTANDING ACCOUNT	MF	ER WES	OPEN	INFO	CLAIM
23/12/08		OUTSTANDING ACCOUNT	MF	i	OPEN	INFO	CLAIM
23/12/08		OUTSTANDING ACCOUNT	MF	i	OPEN	INFO	CLAIM
23/12/08		NEW ACCOUNT	B	squzana	OPEN	INFO	CLAIM
23/12/08		NEW ACCOUNT	B	squzana	OPEN	INFO	CLAIM
23/12/08		CANCELLATION OF MEMBERSH	MS	IS	OPEN	INFO	CANCELL
23/12/08		DEPENDANT REGISTRATION	M	squzana	CLOSED	INFO	APPLICA
23/12/08		ADDING A DEPENDANT	SH	ISLE SH	CLOSED	INFO	MEMBER

Open Queries: 134   Pending Queries: 35   Resolved Queries: 69  
Total Queries: 203   Urgent Queries: 6

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Print Cancel Zoom Page # 1 Across 1 Down 1 Zoom: Page Width

Date From: 01/02/09  
Date To: 28/02/09  
Bonitas

1% Complete  
Pause Cancel

### Customer Service Report

Period: 01/02/09 - 28/02/09

**Bonitas**

Option : BonCap R2500-6269

Member Number	Member Name	Query Type	Query Status
Pending	PANDLE MOUDANGI	CLAIM	WAITING
Total Queries for this Option: 1			

Option : BonSave

Member Number	Member Name	Query Type	Query Status
Pending	DU PLESS	CLAIM	OPEN
240021	DIETZER	LEAD	WAITING
Total Queries for this Option: 2			

Option : Primary

Member Number	Member Name	Query Type	Query Status
2770287	BOOLEY MORTIMER THIBET	CLAIM	WAITING
Pending	BOSHOFF ME	CLAIM	WAITING
6024951	CROWDER R	CLAIM	WAITING
Pending	MRS SADAN	CLAIM	WAITING
Pending	APOLLIS VIL	LEAD	WAITING
2770286	ARRES MCH	LEAD	WAITING
2770289	T WATENDS	LEAD	WAITING
Total Queries for this Option: 7			

Option : Stand...

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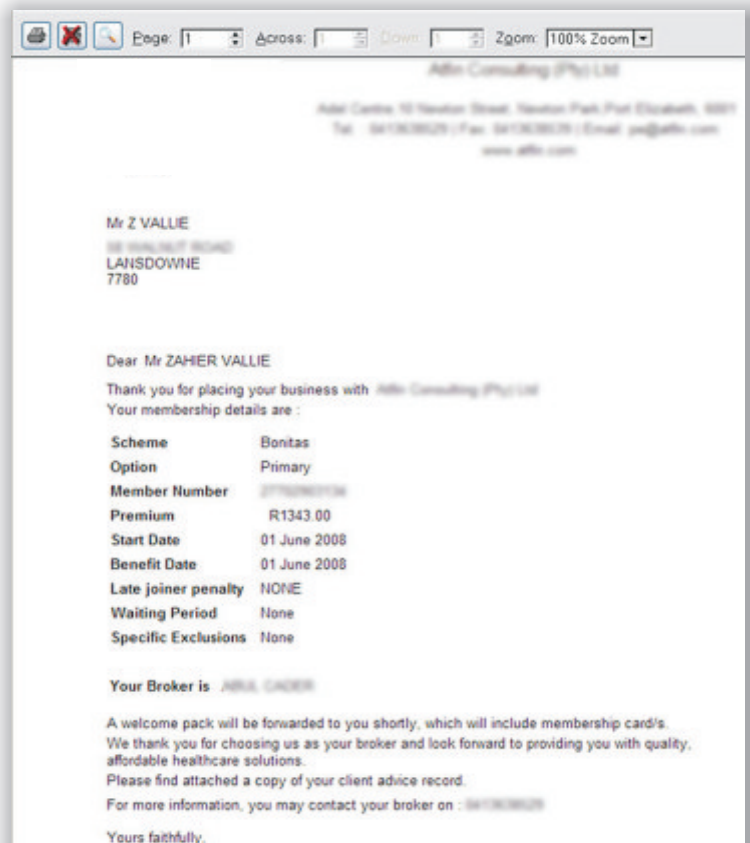
# Compliance Automation

# tabit Solutions

**FAIS Audit Mode** shows which members lack the proper documentation using intuitive colour coding method.

Code	First Name	Surname	Initials	Application Status	Month	Year	A	C	F	L	M
8	TARIQ	SEFS	T	ACCEPTED	SEP	2008					
9	KEITH CHARLES	SOLOMON	KC	SUBMITTED	JUL	2008					
11	LATITIA MAGDALENE	JANUARY	LM	SUBMITTED	APR	2008					
12	RAVI KUMARIN	PILLAY	RK	ACCEPTED	APR	2008					
13	JAH XOMH	GEDRAS	D	ACCEPTED	APR	2008					
14	NOMBULELO	MHEINYA	N	ACCEPTED	MAY	2008					
15	SHERMONAY- SARENA	BOLTHEY	SS	ACCEPTED	APR	2008					
16	NOZAKHE	SUPISO	N	ACCEPTED	APR	2008					
18	ZAHIER	VALLE	Z	ACCEPTED	MAY	2008					
21	LINDY VERENA	GREEFF	LV	SUBMITTED	DEC	2008					
21	LINDY VERENA	GREEFF	LV	ACCEPTED	MAY	2008					
22	SANDRO JUVET	YOKA	SJ	ACCEPTED	MAY	2008					
23	AYESHA SIRI	ALLIE	AB	ACCEPTED	MAY	2008					
24	DEVINE LOUIEEN	WANZA	DL	SUBMITTED	MAY	2008					
25	GLENN AUGUSTINE	BURBIS	GA	ACCEPTED	MAY	2008					
26	FRANCOIS	CLARENCE	F	SUBMITTED	MAY	2008					
27	ANGELA IRENE	VALENTINE	AI	ACCEPTED	MAY	2008					
28	DORNE PATRICIA	SAVAGE	DP	ACCEPTED	MAY	2008					
29	DANIEL CHRISTOFFEL	STEMMET	DC	ACCEPTED	MAY	2008					
30	NCEDISA MICHELLE	MANGALI	NM	ACCEPTED	DEC	2008					
30	NCEDISA MICHELLE	MANGALI	NM	SUBMITTED	MAY	2008					
31	LAUREN ODETTE	MACTAVIE	LO	SUBMITTED	MAY	2008					
32	SHAREEFA	LEEMAN	S	ACCEPTED	MAY	2008					
33	THABISA SHERLEY	MBUYAZWE	TS	ACCEPTED	MAY	2008					
33	THABISA SHERLEY	MBUYAZWE	TS	SUBMITTED	DEC	2008					
34	RANDALL MARLIN	LOUIS	RM	ACCEPTED	MAY	2008					
35	ROCHELLE MARGA	WILLIAMS	RM	ACCEPTED	MAY	2008					
36	SIBULELO LAURA	MADONA	SL	ACCEPTED	MAY	2008					
37	BREYON	BEWEE	B	ACCEPTED	MAY	2008					

**Welcome Letter** is generated from captured information. Format of letter can be customised in MedVision



**FAIS Docs** are scanned and grouped in the Member's Electronic Folder allowing quick access during FAIS Compliance Audits.



# Business Intelligence



**Audit Trail** - Records system activity.

**Admin staff activity** report - shows amount of cases captured by admin staff for period.

**Audit Trail (19 1.0.0.45)**

Filter

Order	User	Action	Module
21,940	acmin	Created DMSProfile: 7209235513089	CREATEPROFILE
21,941	acmin	Scanned SchemeApp for 7209235513089	SCANDOC
21,946	acmin	Updated Member: MBLLAV/AJ3407	MEMBERMAINT
21,950	acmin	Created DMSProfile: 7709250484085	CREATEPROFIL
21,951	acmin	Scanned SchemeApp for 7709250484085	SCANDOC
21,954	acmin	Updated Member: MBEWANAI3406	MEMBERMAINT
21,957	acmin	Created DMSProfile: 6710140123088	CREATEPROFILE
21,959	acmin	Logon	LOGON
21,960	acmin	Manage Members	MemberMaint
21,961	acmin	Error Scanning SchemeApp for 6509251163089	SCANDOC
21,965	acmin	Scanned SchemeApp for 6710140120088	SCANDOC
21,967	acmin	Updated Member: MAFSHALLI3405	MEMBERMAINT
21,968	acmin	Error Scanning SchemeApp for 6509251163089	SCANDOC
21,971	acmin	Updated Member: MATEBESEI3383	MEMBERMAINT
21,972	acmin	SuperUser Activated	MASTERMODE
21,973	acmin	Debug Mode enabled	MAIN
21,976	acmin	Created DMSProfile: 6506075213085	CREATEPROFILE
21,978	acmin	Updated Member: DE VILLIERSI2415	MEMBERMAINT
21,982	acmin	Updated Member: DE VILLIERSI2415	MEMBERMAINT

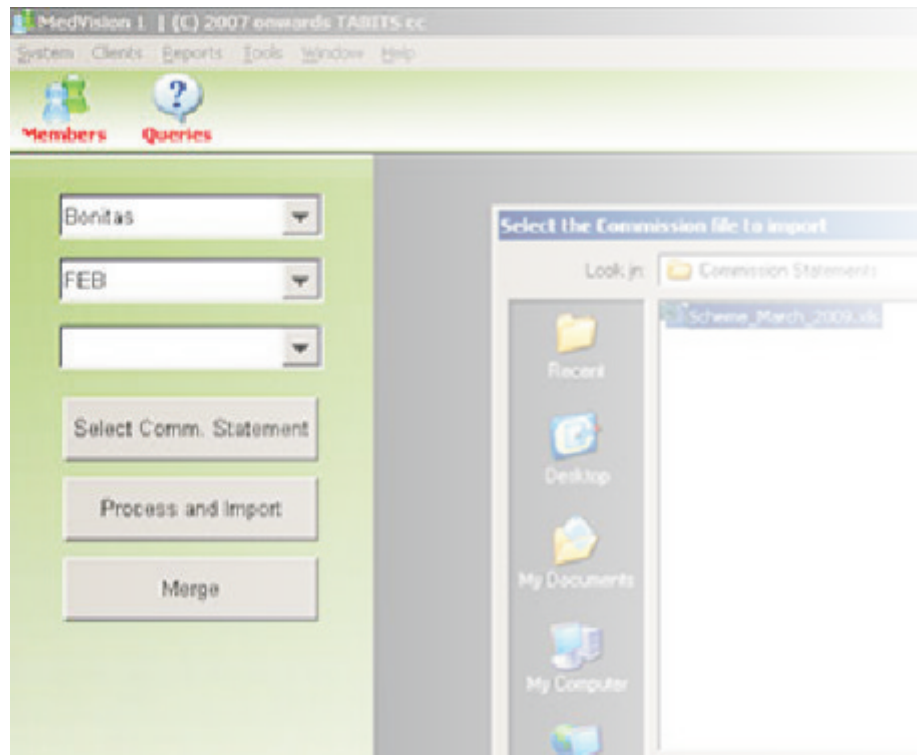
**Easily import commission statements** from : Bonitas, Discovery, Fedhealth, Hosmed, Ingwe, Momentum, Telemed, SamwuMed, Keyhealth, Prosano.

**Supports multiple commission periods.**

**Quickly merge Comm. Statements** and reconcile to Members Captured.

**Generate reports** showing :

- Comm by Broker
- Comm by Scheme
- Comm by Region/Branch
- Comm by Paypoint
- Members not matched to database - i.e new or cancelled members.
- Month to Month member variance by Scheme or Paypoint



**Broker Sales performance** report shows new business for period.