LabSentra

Connecting Every Sample. Empowering Every Decision.

USER MANUAL

Finance Officer

Staff responsible for billing, payments, medical-aid claims, debtors and cost per test.

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About this manual

This manual is for the **Finance Officer** role in LabSentra. It explains the screens you will use and the exact buttons to press, in the order you meet them in a working day.

Screens show only what your role is allowed to do. If a button described here is missing, your laboratory may have configured things differently – ask your administrator.

Your day at a glance

1. Turn billable orders into invoices
2. Record payments and mobile-money prompts
3. Submit and follow up medical-aid claims
4. Manage debtors, statements and credits
5. Maintain exchange rates and cost per test

Your menu

Menu group	Items you will see
Operations	Overview, Patients, Clinicians & clients, Orders, Samples
Output	Notifications
Analytics	Control Tower, Metric explorer, Benchmarks, Dashboards, Scheduled reports, Data exports, Anomalies, Forecasts, Benchmarking, Branches
AI	AI Copilot
Quality	Quality dashboard, Documents, Nonconformities, Risk register, Environment, QC, Sigma metrics
Inventory	Stock, Lots, Purchase orders, Inventory setup, Movements & stock take
Equipment	Equipment register, Due list, Equipment KPIs
Finance	Finance dashboard, Billing queue, Invoices, Receipts, Claims, Debtors, Cost per test, Finance setup
Settings	Administration, Test Catalogue, Integrations, Voice

Signing in for the first time

Your laboratory administrator invites you by e-mail. LabSentra never asks for your password by e-mail or phone.

1. Open the invitation e-mail and follow the link. You arrive at **Welcome to LabSentra**.
2. Enter your full name (optional), a **New password** of at least 12 characters, and **Confirm password**.
3. Select **Activate account**. If the page says the link is invalid or has expired, ask your administrator for a new invitation.

Everyday sign-in

1. Go to **labsentra.com** and choose **Sign in**.
2. Enter your e-mail and password and select **Sign in**. You land on your start page.

Forgotten password

1. On the sign-in page choose **Forgot password?**, enter your e-mail and select **Send reset link**.
2. Open the e-mail, choose **Set a new password**, enter it twice (at least 12 characters) and select **Update password**.

Two-step verification (required for your role)

Your role can sign or view sensitive clinical data, so LabSentra asks for a 6-digit code from an authenticator app (Google Authenticator, Microsoft Authenticator or similar) in addition to your password.

1. The first time, the **Two-step verification** screen shows a QR code. Scan it with your authenticator app (or use **Can't scan? Enter this key:**).
2. Type the 6-digit code from the app and select **Verify**.
3. On later sign-ins you are asked: **Enter the code from your authenticator app.**

> **Note.** You can check or change your authenticator under **Profile → Two-step verification**. The status shows **Verified (AAL2)** once you have entered a code in this session. If you lose your phone, ask your administrator to reset your access.

Finding your way around

Element	What it does
Sidebar	Groups of modules. You only see items your role is allowed to use (see "Your menu"). Long groups can be collapsed.
Branch selector	Choose **All branches** or one branch (shown as *code · name*). Lists, queues and dashboards follow this choice.
Organisation selector	Shown only if you work for more than one laboratory. Changing it resets the branch.
Go to… (Ctrl/Cmd + K)	Command palette: type a module name to jump straight to it.
Scan or type barcode / ID	Scan a specimen, order or patient barcode (or type the number) and press Enter to open it. "Not found" means no match in your branch.
Notifications bell	Unread count and the latest 8 alerts. Click one to open the record; **Mark shown as read** clears them.
Account menu	**Profile** and **Sign out**.

Your profile

- **Personal details** – full name, phone, professional title and registration number. Select **Save changes**. Your title appears beside your e-signature on reports.
- **Change password** – at least 12 characters.
- **My notifications** – mute or unmute categories you can receive (some safety-critical categories cannot be muted).
- **Two-step verification** – add or remove your authenticator.

> **Tip.** Sign out when you leave a shared workstation: Account menu → **Sign out**.

Signatures, reasons and statuses

LabSentra protects patient safety and the audit trail. Some actions need more than a click:

Marked in this manual	What happens on screen
(reason)	You must type why. The reason is stored in the audit trail.
(confirm)	A confirmation dialog asks you to check before continuing.
(e-signature)	The **Electronic signature** dialog asks you to re-enter your **Password** and choose **Sign**. It shows what you are signing and records it in the audit trail. A wrong password shows "Password incorrect".

- Every change is recorded with who, when, what and why – it cannot be edited or deleted.
- Turnaround (TAT) chips: **red** = breached, **amber** = 30 minutes or less left, **green** = on time.
- Result flags: **H/L** outside the reference interval, **HH/LL** critical, **DELTA** big change from the last result, **AMR** outside the measuring range, **NO REF** no reference interval.
- Colour is never the only signal – every status also has a word or icon.

Billing and payments

1. **Billing queue** lists orders ready to bill – create the invoice for the order.
2. Open the invoice and **Issue** it.
3. **Record payment**: the amount defaults to the balance; choose currency and method. Card, bank transfer and cheque need a reference. Submit to get the receipt number, amount applied and remaining balance.
4. Mobile money: **Mobile money** → provider, phone number, amount → **Send prompt**. The status shows pending, completed or failed.

Invoice statuses: draft, issued, partially paid, paid, void, written off. **Print invoice** gives a branded copy.

Credits, voids and reversals

- **Credit / write off** → **Sign & issue** (reason, e-signature).
- **Void** → **Void invoice** (reason) for invoices issued in error.
- **Receipts & payments** → **Sign & reverse** (reason, e-signature) for completed payments taken in error.

Claims, debtors and costs

- **Medical aid claims**: prepare and **Save**, submit, then **Record funder response** → **Record response**. Statuses: draft, submitted, acknowledged, partially paid, paid, rejected, cancelled.
- **Debtors aging** shows outstanding balances by age band; **Statement** → **Create statement invoice**.
- **Cost per test** shows reagent, consumable and labour cost against price; finance managers use **Edit costs for {code}**.
- **Finance setup**: exchange rates, funders and clients. The **Finance** dashboard summarises billing by date and branch.

Analytics and AI

- **Overview** / **Control Tower**: live volumes, pending verification, TAT breached and at risk, criticals, by department and branch. Refreshes every 60 seconds; **Full screen** for a wall display.
- **Metric explorer**: pick a metric, filter, **View records**, **Export CSV** or **Save to dashboard**.
- **Dashboards**: **New dashboard** → **Add tile** → **Save layout**.
- **Scheduled reports**: **New schedule** sends a report automatically; **Run now** for an instant copy.
- **Forecasts** are statistical projections of volume; **Benchmarks** compare against targets; **Data exports** → **Download CSV**.
- **Anomalies**: unusual patterns in volumes, TAT or results. **Explain with AI**, then **Acknowledge**, **Re-open** or **Dismiss** (reason).
- **AI Copilot**: ask questions about your lab's operations in plain language and choose **Ask**.

> **Note.** All AI output is labelled "AI-generated — requires professional review". Rate it **Helpful** / **Not helpful**; for commentary choose **Adopt** or **Reject** (reason). AI never releases results.

Reporting problems

Choose **Raise NC** in the top bar whenever something goes wrong – a damaged delivery, a wrong item, an expired lot, a temperature excursion in the store. Describe what happened; the quality team investigates.

When a procedure you must follow is issued or revised, open it from the Quality dashboard and choose **I have read and understood v{n}**.

Practising in the free demo

- A free demo lab contains synthetic patients at every stage. The yellow bar shows the days left.
- Use **View as** ("Try the app as…") to switch to your role and practise exactly what you will see.
- In the demo, printing, PDFs and branding are removed, and SMS, e-mail, claims, mobile money and portal invites are not really sent.
- Same-person checks are relaxed so one person can play every role. In your live lab they apply in full.

Getting help

- Your first contact is your laboratory manager or system administrator – they can reset access, change your role and fix configuration.
- If something looks wrong in a result or report, do not work around it: raise a nonconformity (**Raise NC** in the top bar) so it is investigated.
- Product support and training: **labsentra.com/contact**.

> **Note.** This manual describes LabSentra as configured by default. Your laboratory may have switched some features off, added custom roles or changed who issues reports (scientist or clinical authoriser) – your administrator can confirm.