
Submitting a Patient to Oxia — User Guide

Before you can book an Oxia diabetic-retinopathy screening, the patient must first exist in Oxia. This is a **once-off** step per patient: you submit their details to Oxia, and Oxia gives back an ID that is stored on the patient. After that the patient is ready for screenings.

Everything happens on the **Oxia** tab of the patient's Clinical Examination.

Before you start — the patient's details must be complete

Oxia will reject a patient whose core details are missing, so make sure the patient record has all of the following filled in first (Contacts, or the patient card on the exam):

- **Title** (Mr, Mrs, ...)
- **First name** and **Surname**
- **Identity number** (ID)
- **Email address**
- **Cell phone number**
- **Medical aid** and **medical-aid plan**
- **Gender** (male / female)
- **Date of birth**

If any of these are missing, the submission stops with a message telling you exactly which field to complete.

1. Open the Oxia tab

Open the patient's Clinical Examination and go to the **Oxia** tab.

If the patient is **not yet** in Oxia, you'll see the **Submit Patient** button. (If you instead see **Update Patient** / **Book Screening**, the patient is already in Oxia — you can skip straight to booking a screening.)

Create Invoice

Done

Cancel

Repurchase

Preview Quote

New

In Progress

Done

Send message

Log note

WhatsApp

Activity

Check Patient's Account

SWFG(ex)-58184

Name

Phillip Johnathan Venter

Birthdate

Mar 17, 2000

Nick Name

Phillip

Age at Exam

26

Account Number

SWFG-13257

Exam Date ?

Jun 18

Payment Terms

Screening

☐

Occupation

IT Support

Last Exam Date

Jul 6, 2023

Language

English (US)

Company

Spectacle Warehouse Atterbury

Patient Language

Afrikaans

Tags

Repurchase ?

☐

Contact Lenses

Fees/Miscellaneous

Dispensing Sheet

Other Info

Summary

Medical Aid Confirmation

Grab a Heart

Oxia

Submit Patient

Created on

Procedure

ICD

Status

The conversation is empty.

2. Click Submit Patient and complete the pop-up

Click **Submit Patient**. A short window opens:

Submit Patient

×

These Fields are not required, but can be of assistance to the diagnosing professional.

Country

South Africa

Doctor

Allergies

Blood Thinners

General Comment

Submit Patient

Cancel

- **Country** (*required*) — the patient's country (e.g. South Africa). This comes straight from Oxia.
- **Doctor** (*optional*) — the doctor responsible for the patient. This list comes from Oxia's organisation users.
- **Allergies, Blood Thinners, General Comment** (*optional*) — any relevant notes.

Click **Submit** (or **Update Patient**) to send the patient to Oxia.

If nothing appears in the Country or Doctor lists, your branch may not be linked to Oxia — check you're signed in under the correct company (top-right selector).

3. Confirmation

On success, the patient is created in Oxia and their **Oxia ID is saved automatically** on the patient record. On the Oxia tab, the **Submit Patient** button is replaced by **Update Patient** and **Book Screening**.

The patient is now ready — see the *Booking an Oxia Diabetic Retinopathy Screening* guide for the next step.

Changed a patient's details later? Use **Update Patient** on the Oxia tab to push the changes to Oxia.

Quick recap

1. Complete the patient's core details (title, name, ID, email, cell, medical aid, gender, date of birth).
2. Oxia tab → **Submit Patient**.
3. Choose **Country** (and optionally a **Doctor**), add any notes → **Submit**.
4. The Oxia ID is saved; **Book Screening** now appears.