Implementation Guide Document of Mocero HMS Application

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Implementation Guide 1.0 - Mocero HMS

Implementation Guide 1.1 - Mocero HMS:

★ The implementation guide is a hierarchical structure of our Mocero - HMS application areas in the component hierarchy.

★ It contains all the work steps required for the implementation with Prerequisites information.

Summary of HMS Application.

Pages need to be Set up:

Section 1:

1. General Details (Hospital Registration).
2. Category and Department.
3. Other Set-up.
4. Services.
5. IP Set-up
6. Price Set-up
7. Packages

Section 2: Lab

8. Lab Set-up.

Section 3: Account Set-up

9. Bank Account Details.

Section 4: Preference.

10. Calendar.
11. Print Set up.
12. Case Sheet.
13. Chat Configuration

Section 5: User.

14. User Creation.
15. Role Rights.
16. User Role Creation.

Data Required:

Section 1: Hospital Setup.

1. General Details.

1.1. Objective:

The objective of the "**General details"** Menu is,

1. Create a new hospital by entering Hospital Information, Hospital Contact Information, and Other Information.
2. Adding Branch Details and License details etc.,
3. Add Setup ID (Code Template) to the hospital and the branch hospital.
4. To Edit, Delete, Activate and Deactivate the Hospitals and Branches.

1.2. Pre-Requisites. (Information)

Need three types of information to set up the hospital.

1. Hospital Information.
2. Branch Information. (If Any).
3. Setup ID (Code Templates) of the hospital and Branch.

<u>1. Hospital Information such as.</u>

1. Hospital Name.*
2. Hospital Logo. (Image)*
3. Hospital Favicon. (Image).
4. Hospital License Number.*

5. Hospital Contact Person Name.*
6. Hospital Contact Number.*
7. Hospital Contact Person Email ID.
8. Admin Email ID.*
9. Product Code (Product Availed by the Hospital).*
10. Hospital Address Details,
11. Hospital Address*
12. Country*
13. State*
14. City*
15. Other Details, (To Display in Mobile Application)
16. Hospital Story.
17. Hospital Vision and Mission.
18. Google Review Link.
19. File Type (Hospital Photos, Videos, Accreditation, News Media, Accomplishment & Awards).
20. Description of the File.
21. Upload option to upload the image.
22. Emergency Contact Type.
23. Emergency Contact Mobile No.

2. **Branch Information such as**

1. Branch Name.*
2. Branch Description.
3. Branch Logo. (Image)
4. Branch Contact Person Name.*
5. Hospital Contact Mobile Number.*
6. Hospital Contact Person Email ID.*

Hospital Address Details,

7. Hospital Address*
8. Country*
9. State*

10. City*

License Details,

1. Subscription Start Date.*
2. Subscription End Date.*
3. License Number.*
4. Product Code (Default)

3. Setup ID Information such as,

Enter the information to set up the ID of the respective departments by adding the below information.

5. **Need Prefix, Suffix, No.of.Digits and Start Value and YearWise**
6. **Need Setup ID Format (Code template ID) for the below Forms**
    1. Category and Department.
    2. Department Master.
    3. Package Master.
    4. Price Setup.
    5. Billing OP Request.
    6. OP Visit.
    7. IP Visit.
    8. Home-Care Visit.
    9. Diagnostics
    10. Advance Payment, etc..,

1.3. Implementation Process Flow.

1. Create a New Hospital:

- Click the **“Settings”** on the top right of the application.
- Click the **“Hospital Set-up”** Option.
- In the List of Drop-down click the **“General Details”**

- Click the **"Add New"** button on the top right corner Enter the required information to add a hospital and also select whether the hospital does **have Branches or not.**
- Click **"Submit"** After entering the information to save the hospital.
- You can delete, Edit and Inactivate the hospital using the A**ction buttons** in the hospital lists.

2. Create a New Branch:

- Click the **"Settings"** on the top right of the application.
- From the Hospital List, you can Find "(+Add branch), Setup ID, Delete and Edit Buttons.
- Click the **"(+ Add Branch)"** Button and Enter the required information of the branch.
- Click **"Submit"** After entering the information to save the information.
- You can delete, Edit and Inactive the Branch using the A**ction buttons** in the Branch lists.

3. Add Setup ID (Code Template):

- From the Hospital List, you can Find the Setup ID Button to add the setup ID for the forms of the hospital.
- Click the **"Setup ID"** Button and Enter the required information of the forms in the hospital.
- The information is such as Prefix, Suffix, Start Value, No.of Digits, and YearWise for each form.
- Click **"Submit"** After entering the information to save the information.
- You can delete, Edit, and Inactive the Branch using the **Action buttons** in the Setup ID list.

2. Category and Department.

1. Categories and Departments within the hospital are created on this page.
2. Categories- Every data point that you want the reports for Ex: Professional charges

3. Department- How the hospital defined the internal organizations and departments Ex: Cardiology

Subcategory and Sub-Department:

1. Subcategories and sub-departments under their parent category and department can be created on page

2.1. Objective:

The objective of the "**Category and Department**" Menu is,

1. To Create a new Category for the hospital.
2. To Create a New Department for the hospital.
3. To Edit, Delete, Activate and Deactivate the Category and Department.

2.2. Pre-Requisites. (Information):

Need four types of information to set up Category and Department.

1. Category Information.
2. Department Information.
3. Sub-Category Information.
4. Sub-Department Information.

1. Category Information such as.

1. Category Name*
2. Mobile Description
3. Remarks
4. Mobile Icon (to show in Mobile Application)*

2. Department Information such as.

5. Department Name*
6. Mobile Description

7. Remarks
8. Mobile Icon (to show in Mobile Application)*

3. Sub-Category information such as.

9. Sub-Category Name*
10. Mobile Description
11. Remarks
12. Mobile Icon (to show in Mobile Application)*

4. Sub-Department information such as.

13. Sub-Department Name*
14. Mobile Description
15. Remarks
16. Mobile Icon (to show in Mobile Application)*
17. **Flag:** Is Department Level Booking

2.3. Implementation Process Flow.

1. Create a New Category:

- Click the **"Settings"** on the top right of the application.
- Click the **"Hospital Set-up"** Option.
- In the List of Drop-down click the **"Category and Department"**
- Click the **"Add New"** button on the top right corner, Select the **Branch**, Select the Type as" **Category** " and Enter the required information to add a Category
- Click **"Submit"** After entering the information to save the Category.
- You can delete, Edit, and **"Add Sub-Category"** using the A**ction buttons** in the Category lists.

2. Create a Sub-Category:

- Click the **"Settings"** on the top right of the application.
- Click the **"Hospital Set-up"** Option.

- In the List of Drop-down click the **“Category and Department”**
- Select the **branch**, Select the Type as” **Category** “ and the List of Category will be shown.
- Click **“Add Sub-Category”** to Add Sub-Category using the A**ction buttons** in the Category lists.
- Enter the required information to add a Sub-Category
- Click **“Submit”** After entering the information to save the Sub-Category.

3. Create a New Department:

- Click the **“Settings”** on the top right of the application.
- Click the **“Hospital Set-up”** Option.
- In the List of Drop-down click the **“Category and Department”**
- Click the **“Add New”** Button, Select the **Branch**, Select the Type as” **Department** “ and Enter the required information to add a Department.
- Click **“Submit”** After entering the information to save the Department.
- You can delete, Edit, and **“Add Sub-Department”** using the A**ction buttons** in the Department lists.

4. Create a Sub-Department:

- Click the **“Settings”** on the top right of the application.
- Click the **“Hospital Set-up”** Option.
- In the Drop-down List click the **“Category and Department”**
- Select the **Branch**, Select the Type as” **Department** “ and the List of departments will be shown.
- Click **“Add Sub-Department”** to Add Sub-Department using the A**ction buttons** in the Department lists.
- Enter the required information to add a Sub-Department.
- **Flag**: Is Department level booking.

1. Make the Department available as Schedule\Appointment based Service.
2. If **Yes**, add several concurrent time slots. (You can book a number of appointments in the same time slot)

❖ Click "**Submit**" After entering the information to save the Sub-Department.

2.4. Flags and References.

S.No	Flag Name	Description
1.	Is Department Level Booking **(Yes\No)**	1. Make the Department available as Schedule\Appointment based Service. 2. If **Yes**, add the number of concurrent time slots.

3. Other Setup

3.1. Objective:

The objective of the "**Other Setup**" Menu is,

a) To Set-up Discount Type, Payment Type, Refund type, Billing Class, Package Type, and Designation.

3.2. Pre-Requisites. (Information):

Need the below information to set up the forms of HMS.

1. Discount Information.
2. Payment Type Information.
3. Refund Type Information

4. Billing Class Information.
5. Package Type Information.
6. Designation Information.

1. Discount Information such as.

1. Discount Name*
2. Discount Description*
3. Remarks
4. **Flag:** Is Authorization Required*
5. Active From*
6. Active To*
7. Branch*

2. Payment Type Information such as.

8. Payment Type Name*
9. Payment Type Description*
10. Remarks
11. Branch*

3. Refund Type information such as.

12. Refund Type Name*
13. Refund Type Description*
14. Remarks
15. Branch*

4. Billing Class information such as.

16. Billing Class Name*
17. Billing Class Description*
18. Remarks
19. % Increase*
20. Branch*

5. Package Type information such as.

21. Package Type Name*
22. Package Type Description*
23. Remarks
24. Branch*

6. Designation information such as.

25. Designation Name*
26. Designation Description*
27. Remarks
28. Appointment Required*
29. Branch*

3.3. Implementation Process Flow.

1. Create a New Discount Type:

- Click the **"Settings"** on the top right of the application.
- Click the **"Hospital Set-up"** Option.
- In the List of Drop-down click the **"Other Setup"**
- In the Other Setup Page, Click the **"Add New"** button on the top right corner, Select the Type as" **Discount**" and Enter the required information to add a Discount Type.
- **Flag:** Is Authorization Required? (**Yes**, To get authorization to approve the Discount Type)
- Click **"Submit"** After entering the information to save the Category.
- You can delete, and Edit Discount Type using the A**ction buttons** in the Other Setup lists.

2. Create a New Payment Type:

- Click the **"Settings"** on the top right of the application.
- Click the **"Hospital Set-up"** Option.

- In the List of Drop-down click the **“Other Setup”**
- In the Other Setup Page, Click the **“Add New”** button on the top right corner, Select the Type as” **Payment Type**“ and Enter the required information to add a Payment Type.
- Click **“Submit”** After entering the information to save the Payment Type.
- You can delete, and Edit **Payment Type** using the A**ction buttons** in the Other Setup lists.

3. Create a Refund Type:

- Click the **“Settings”** on the top right of the application.
- Click the **“Hospital Set-up”** Option.
- In the List of Drop-down click the **“Other Setup”**
- In the Other Setup Page, Click the **“Add New”** button on the top right corner, Select the Type as” **Refund Type**“ and Enter the required information to add a Refund Type.
- Click **“Submit”** After entering the information to save the RefundType.
- You can delete, Edit, and Refund **Type** using the A**ction buttons** in the Other Setup lists.

4. Create a Billing Class:

- Click the **“Settings”** on the top right of the application.
- Click the **“Hospital Set-up”** Option.
- In the List of Drop-down click the **“Other Setup”**
- In the Other Setup Page, Click the **“Add New”** button on the top right corner, Select the Type as” **Billing Class**“ and Enter the required information to add a Billing Class.
- Add Charges increasing percentage in **%Increase** Column.
- Click **“Submit”** After entering the information to save the Billing Class.
- You can delete, Edit using the A**ction buttons** in the Other Setup lists.

5. Create a Package Type:

- Click the **“Settings”** on the top right of the application.
- Click the **“Hospital Set-up”** Option.
- In the List of Drop-down click the **“Other Setup”**
- In the Other Setup Page, Click the **“Add New”** button on the top right corner, Select the Type as” **Package Type**“ and Enter the required information to add a Package Type.
- Click **“Submit”** After entering the information to save the Payment Type.
- You can delete, Edit **Package Type** using the A**ction buttons** in the Other Setup lists.

6. Create a Designation:

- Click the **“Settings”** on the top right of the application.
- Click the **“Hospital Set-up”** Option.
- In the List of Drop-down click the **“Other Setup”**
- In the Other Setup Page, Click the **“Add New”** button on the top right corner, Select the Type as” **Designation**“ and Enter the required information to add a Designation.
- Select What type of Appointment is required for the designation in the “**Appointment Required**” Column.
- Click **“Submit”** After entering the information to save the Payment Type.
- You can Delete, Edit **the Designation** using the **Action buttons** in the Other Setup lists.

3.4. Flags and References.

S.No	Flag Name	Description
1.	Is Authorization Required **(Yes\No)**	1. Is authorization required to approve the discount?

4. Services

4.1. Objective:

The objective of the “**Services**” Menu is,

b) To Create a service\Charge to the hospital, to the Branch, and to map the service to Lab, OP, Mobile App, Doctor, and Work-Order.

4.2. Pre-Requisites. (Information):

a) Need the below information to create a service to the hospital\Branch.

1. Branch Name*
2. Category Information.*
3. Department Information. *
4. Sub-Category Information.*
5. Sub-Department Information.*
6. Service Name*
7. Remarks
8. Service Type*(IP, OP, and HomeCare)*
9. Base amount Type. (Input, Fixed, Range, Hourly, and Range Wise)*
10. Base Amount.*
11. **Flag:** Consulting* (Yes\No)

    If Yes,

    - Type of Consulting*
    - Type of Consultation*
    - Doctor Name*
12. **Flag:** Is Lab Enable* (Yes\No)

    If Yes,

    - Is work-Order Enable Should be **Yes**

13. **Flag:** Is Work Order Enable* (Yes\No)
14. **Flag:** Is Doctor Enable* (Yes\No)
15. **Flag:** Refund Scenario (Yes\No)
16. **Flag:** Is Mobile Enable* (Yes\No)
17. If **Yes,** Service Image Upload (Upload option)*
18. **Flag:** Is Internal* (Yes\No)
19. **Flag:** Is Distance Fee* (Yes\No)

Mobile Options:

20. **Flag:** Is Mobile Discount Applicable **(Yes\No)**
21. MobileDiscount Type. (Percentage\Fixed)
22. Mobile Discount Amount.

Discount Applicable:

23. **Flag:** Is Service Level Discount Allowed.
24. **Flag:** Is Loyalty Earning Allowed.
25. **Flag:** Doctor Name Required
26. **Flag:** Is Loyalty Scheme.

Lab Related Options:

27. Parameter Name*
28. Reference Value .*
29. Unit*
30. Sample Type*
31. + Instructions

4.3. Implementation Process Flow.

1. Create a New Service:

- Click the **"Settings"** on the top right of the application.
- Click the **"Hospital Set-up"** Option.
- In the Drop-down List, Click the **"Services"**
- On the Service List Page, Click the **"Add New"** button on the top right corner and Enter the required information to add a Service.
- **Flag:** Consulting* (Yes\No)

  Click Yes if the service needs consulting (go to the appointment) before proceeding and Enter the below information.
  - Type of Consulting* (Walkin\Video\SMS)
  - Type of Consultation*(Pre-Paid\Post-Paid)
  - Doctor Name* (Select the Doctor name to add the service)

- **Flag:** Is Lab Enable* (Yes\No)

  Click yes, if the service needs to be added in Lab Charges and Enable the Flag "**is Work Order Enable"** by clicking **"Yes"**
  - Is work-Order Enable Flag is used to enable the service available on work order management.

- **Flag:** Is Work Order Enable* (Yes\No).
  - Click yes, if the service needs to be handled on Work order management.

- **Flag:** Is Doctor Enable* (Yes\No)
  - Click yes, if the service needs to be charged against a doctor.

- **Flag:** Refund Scenario (Yes\No)
  - Click yes, to Enable the refund option for the service.

- **Flag:** Is Mobile Enable* (Yes\No)
  - Click yes, to Enable the service in Mobile-App as well.
  - If **Yes,** Service Image Upload (Upload option)

- **Flag:** Is Internal* (Yes\No)
    - Click yes, if the service is internal service.
    - Click No, if the service is an external service.

- **Flag:** Is Distance Fee* (Yes\No).
    - Click yes, to add the distance fee for the service. (Ex: HomeCare Services)

Mobile Options:

- **Flag:** Is Mobile Discount Applicable **(Yes\No)**
    - Click yes, if the service is applicable mobile-App discount. (Ex: HomeCare Services)
- MobileDiscount Type. (Percentage\Fixed)
    - Enter the Discount type.
- Mobile Discount Amount.

Discount Applicable:

- **Flag:** Is Service Level Discount Allowed.
    - Click yes, to Enable discount for individual service (Not overall Bill Discount)

- **Flag:** Is Loyalty Earning Allowed. (Reward points)
- **Flag:** Doctor Name Required
- **Flag:** Is Loyalty Scheme.

Lab Related Options:

If the service is Lab related service\Charge\Test, Enter the below information to add the Lab results.

- Parameter Name*
- Reference Value .*
- Unit*

- Sample Type*
- + Instructions

- Click **"Submit"** After entering the information to save the Service.
- You can delete, Edit, and Deactivate the service using the A**ction buttons** in the Services lists.

4.4. Flags and References.

S.No	Flag Name	Description
1.	Consulting* (Yes\No)	Click yes if the service needs consulting (go to the appointment) before proceeding and Enter the below information.
2.	Is Lab Enable* (Yes\No)	Click yes, if the service needs to be added in Lab Charges and Enable the Flag "**is Work Order Enable"** by clicking **"Yes"**
3	Is Work Order Enable* (Yes\No).	Click yes, if the service needs to be handled on Work order management.
4	Is Doctor Enable* (Yes\No)	Click yes, if the service needs to be charged against a doctor.
5	Refund Scenario (Yes\No)	Click yes, to Enable the refund option for the service.
6	Is Mobile Enable* (Yes\No)	• Click yes, to Enable the service in Mobile-App as well. • If **Yes,** Service Image Upload (Upload option)

7	Is Internal* (Yes\No)	• Click yes, if the service is internal service. • Click No, if the service is an external service.
8	Is Distance Fee* (Yes\No).	Click yes, to add the distance fee for the service. (Ex: HomeCare Services
9	Is Mobile Discount Applicable **(Yes\No)**	Click yes if the service is an applicable mobile-App discount. (Ex: HomeCare Services)
10	Is Service Level Discount Allowed.	Click yes, to Enable a discount for individual service (Not overall Bill Discount)
11	Is Loyalty Earning Allowed. (Reward points)	
12	Doctor Name Required	
13	Is a Loyalty Scheme.	

5. IP

5.1. Objective:

a) The objective of the **“IP”** Menu is to **Create Wards** and To **Update the Operation Master.**

1. To Create Ward.

2. To Create Categories of IP Wards.
3. Bed Management (Wards)

5.2. Pre-Requisites. (Information):

b) Need the below information to create a service to the hospital\Branch.

1. Branch*
2. Ward Name*
3. Category *
4. (+) Button (Add Category) General\ICU\Operation
    - Category Name
    - Branch ID
    - Status
5. Description
6. Notes
7. Number of Beds*
8. Select List.* (Active\InActive)

Bed Management Details,

1. Bed Name.*
2. Bed Description.
3. Bed Status.*

5.3. Implementation Process Flow.

1. Create a Ward:

- Click the **“Settings”** on the top right of the application.
- Click the **“IP”** Option.
- In the List of Drop-down click, the **“Ward”**

- In the Ward Management Page, Click the **"Add New"** button on the top right corner, Enter the number of beds and Enter other required information to add a Ward.

  Add Category:

  1. Add a Category by clicking the **(+) icon** next to the category column, Enter the below information to add a Category, and Click **"Submit"** to Save the Category.

- Click **"Submit"** After entering the information to save the Billing Class.
- You can delete, Edit, and Deactivate Wards using the A**ction buttons** in the Ward lists.

2. Bed Management

- Click the **"Settings"** on the top right of the application.
- Click the **"IP"** Option.
- In the List of Drop-down click, the **"Ward"**
- In the List of Wards, Click the **"Bed Management"** Action Button to add beds to the ward.
- Enter Bed Name, Bed Description, Bed Status and Click **"(+)"** to add beds one by one until the number of beds is reached.

- Click **"Submit"** After entering the information to save the Billing Class.
- You can delete, Edit, and Deactivate Wards using the A**ction buttons** in the Ward lists.

6. Price Setup

6.1. Objective:

a) The objective of the **"Price Setup"** Menu is to Setting up the price matrix of IP, OP, and HomeCare Services\Charges based on the Billing Class & Entities (General, VIP, Entity)

1. To Set Up Service Price Matrix.

6.2. Implementation Process Flow.

1. **Service Price Matrix Set-up:**

- Click the **"Settings"** on the top right of the application.
- Click the **"Hospital Set-up"** Option.
- In the Drop-down List, Click the **"Price Set-up"**
- On the Left Side of the Service Price Matrix Page, **Filter** the Category\Department, and Select the Branch to get the list of Services with **Billing classes, IP Wards Classification.**
- From the table, Click the Category\Department to get the Service list of the selected category\Department.
- Click **"Edit Icon " i**n the IP Ward Name column to set up the price of the IP Ward you want to Set-up.
- Select "Active From" Date and Select the Amount type (Base Amount\Actual Amount). (Amount Type - Increase the price from Base Amount or Actual Amount).

- Type the Amount you want to Increase\Decrease in the **Amount Column**, Select the Amount type in the Drop Down (Whether in Amount or Percentage),
- Change **"Round-off"** to Yes, if you want to round off the outcome price, and Click **"Apply"**
- Once you verified the new price,
    1. Click **"Save" to** apply the changes.
    2. Or Click "**Apply to all Classes**" to apply the changes to all the Billing Classes (General, VIP)for the ward you have changed.
- You can find the Edit Icon on every IP Ward name column to edit the price using the above steps.

7. Packages

7.1. Objective:

The objective of the **"Packages"** Menu is,

a) To Create a Health Package by adding required services on the Packages.

7.2. Pre-Requisites. (Information):

Need the below information to create a health package,

Package Details:

1. Name*
2. Branch*
3. Type*
4. Category*
5. Sub- Category*
6. Department*
7. Sub- Department*
8. Active From*
9. Active To*
10. No of Valid Days*
11. Package Image
12. Amount*
13. Discount Type
14. Discount
15. **Flag:** Is Mobile (Yes\No)*
16. Remarks

Package Highlights: (For Mobile View)

1. Package Highlights
2. Package Description*
3. Sales Text
4. Terms and Conditions (Text Box)

Service Details:

1. Service Name*
2. Service Code (Default)
3. No of Usage*

7.3. Implementation Process Flow.

1. Create a Health Package:

- Click the **"Settings"** on the top right of the application.
- Click the **"Hospital Set-up"** Option.
- In the Drop-down List, Click the **"Packages"**
- In the Package List, Click the **"Add New"** button on the top right corner, and Enter other required information to create a package.
- **Flag**: Is Mobile (Yes\No). Click **Yes**, to Enable the Health Package available in Mobile-Application.
- In-Service Details, search the Services you want to add, click the service to add No of usage for the service and Click the **(+) icon** to add it to the list.
- You can Delete\Edit the services added before you save them by using Action Button.
- Click **"Save Package"** After entering the information to save the Package.
- You can Delete, Edit, and View Packages using the A**ction buttons** in the **Package list.**

7.4. Flags and References.

S.No	Flag Name	Description
1.	Is Mobile **(Yes\No)**	Click **Yes**, to Enable the HealthPackage available in Mobile Application

Section 2: Lab Setup.

8. Lab Setup:

8.1. Objective:

The objective of the **"Lab Setup"** Menu is,

a) To Create an Internal\External Lab Service Provider and Mapping them to the Hospital Branches.

8.2. Pre-Requisites. (Information):

Need the below information to create a health package,

Service Provider Details:

1. Service Provider Name\Lab Name*
2. Lab License Number*
3. Lab Image (Upload Image).
4. Contact Person Name*
5. Mobile No*
6. Email ID*
7. **Flag:** Is Lab (Yes\No)*
8. **Flag:** Is External (Yes\No)*
9. Service Provider Description.

Service Provider Address Details:

1. Address Line 1*
2. Address Line 2*
3. Area*
4. Country*
5. State*
6. City*

8.3. Implementation Process Flow.

1. Create a Lab Service Provider:

- Click the **"Settings"** on the top right of the application.
- Click the **"Lab"** Option.
- In the Drop-down List, Click the **"Lab Setup"**
- In the Package List, Click the **"Add New"** button on the top right corner,
- You can enter Internal Lab Provider\External Lab service provider details.
- **Flag**: Is Lab(Yes\No). Click **Yes**, if you entered the lab details (Not Lab Person Details)
- **Flag**: Is External(Yes\No). Click **Yes**, if the entered information is External Lab information.
- In the Hospital Mapping section. Select the Hospital Name and Branch Name and Click **(+) Icon** to map the hospital to the service provider.
- In-Service Provider Address Details, Enter the address information of the service provider.
- Click **"Submit"** After entering the information to save the Lab Service Provider.
- You can Delete, Edit, and Add PinCode Packages using the A**ction buttons** in the **Service Provider list.**

8.4. Flags and References.

S.No	**Flag Name**	**Description**
1.	Is Lab**(Yes\No)**	Click **Yes**, if the service provider is a Lab (Not an internal lab Person)
2.	Is External **(Yes\No)**	Click **Yes**, if the lab is external Lab (Third Party Lab service provider)

Section 3: Account Setup.

9. Bank Account Details:

9.1. Objective:

The objective of the **"Bank Account Detail"** Menu is,

b) To add the hospital Bank Account Details and Map the account to Different collections of the hospital like Consultation, Lab, and Pharmacy.

9.2. Pre-Requisites. (Information):

Need the below information to Add the Bank Account Details.

Service Provider Details:

10. Account Holder Name*
11. Account Name*
12. Re-Enter Account Number
13. IFSC Code*
14. Account Type* (Current\Savings)
15. PAN Number*
16. Payment Collection Type* (Consultation\Lab\Pharmacy)

9.3. Implementation Process Flow.

1. Add Hospital Bank Account Details:

- ❖ Click the **"Settings"** on the top right of the application.
- ❖ Click the **"Accounts"** Option.
- ❖ In the Drop-down List, Click the **"Bank Account Details"**
- ❖ In the Bank Account List, click the **"Add New"** button on the top right corner,
- ❖ In the Bank Account Details Page, enter the required information.

- Select the **Payment CollectionType** (Map the Bank Account to a Different Collection type)
- Click the **"Save"** button to save the Bank account details.

Section 4: Preference.

10. Calendar:

10.1. Objective:

The objective of the **"Calendar"** Menu is,

a) To add the Calendar schedule to a doctor Level and Department Level for the appointment purpose.

1. Doctor Level Calendar Configuration. (Doctor Schedule)
2. Department Level Calendar Configuration. (Service Schedule eg: Physio, X-ray)

10.2. Pre-Requisites. (Information):

Need the below information to Configure Doctor Level\Department Calendar Schedule.

Doctor Level Schedule Details:

1. Hospital Name
2. Branch Name
3. Schedule Type (Doctor Level)
4. From Date
5. To Date
6. Days (select multiple days)
7.
8. Scheduled Start Time
9. Schedule End Time

10. Appointment Type (Walkin\Video)
11. Per Patient Handling
12. Check Box - Disable Mobile Appointment Booking.

Department Level Schedule Details:

13. Hospital Name
14. Branch Name
15. Schedule Type (Department Level)
16. Department
17. Sub-Department
18. Service
19. From Date
20. To Date
21. Days (select multiple days)
22. Scheduled Start Time
23. Schedule End Time
24. Appointment Type (Walk-in\Video)
25. Per Patient Handling
26. Check Box - Disable Mobile Appointment Booking.

10.3. Implementation Process Flow.

1. Add Doctor Level Configuration:

- ❖ Click the **"Settings"** on the top right of the application.
- ❖ Click the **"Preference"** option.
- ❖ In the Drop-down List, Click the **"Calendar"**
- ❖ In the Calendar Configuration List, Click the **"Add New"** button on the top right corner,
- ❖ In the Schedule Page, Select the Schedule type as "**Doctor Level"** and Enter the required information.

- Checkbox - Tick the Disable mobile appointment booking to remove the appointment from the mobile application
- Click the **"Submit"** button to save the Schedule Details.
- You can find the list of Schedules on the calendar configuration page and also you can switch on\off the schedule for each day using On\Off Button.

2. Add Department Level Configuration:

- Click the **"Settings"** on the top right of the application.
- Click the **"Preference"** option.
- In the Drop-down List, Click the **"Calendar"**
- In the Calendar Configuration List, Click the **"Add New"** button on the top right corner,
- In the Schedule Page, Select the Schedule type as "**Department Level",** Select the **Department Name, Sub-Department name, Service** to schedule and Enter the other required information.
- Checkbox - Tick the Disable mobile appointment booking to remove the appointment from the mobile application
- Click the **"Submit"** button to save the Schedule Details.
- You can find the list of Schedules on the calendar configuration page and also you can switch on\off the schedule for each day using On\OFF Button.

11. Print Set-up:

11.1 Objective:

The objective of the **"Print Set-up** Menu is,

a) To Setup the Print setting of the below Printing Pages.

1. Prescription
2. Procedure.
3. Diet
4. Medical Certificate.

11.2. Implementation Process Flow.

1. Prescription Page Setup:

- Click the **“Settings”** on the top right of the application.
- Click the **“Preference”** option.
- In the Drop-down List, Click the **“Print Setup”**
- In the List of Tabs on the Print Page settings page, Click the **“Prescription”** Tab to set up the prescription Page.

- **<u>Prescription Print Settings (Yes\No)</u>**, Click **Yes,** to enable prescription print settings. Then, **Click on the Arrow** icon on the “Prescription Print Settings” and new columns will appear where you enter the top and bottom values of the prescription.

- **<u>Header (Yes\No)</u>**, Click **Yes,** to Print Header on Prescription. Then, **Click on the Arrow** icon on the “**Header**” and Doctor information Columns will appear where to add the logo of the hospital by clicking **“Choose File”**

- **<u>Footer(Yes\No)</u>**, Click **Yes,** to Print Footer on Prescription. Then, **Click on the Arrow** icon on the “**Footer**” and new columns will appear where to add **Marketing Content and Other content** on the text box.

- **<u>Prescription(Yes\No)</u>**, Click **Yes,** to Print the Prescription on the Below Format. Then, **Click on the Arrow** icon on the “**Prescription**” and new columns will appear.
    1. Select the prescription Type.
    2. Generic Name (Yes\No) - Click **Yes**, to Print Generic Name on Prescription.

3. Age & Gender (Yes\No) - Click Yes, to Print Age and gender on the prescription.

4. Prescription type (Choose the color)

5. Choose a Font Style.

6. Set the Font size.

- **<u>Lab Prescription\Diagnostics (Yes\No)</u> -** Click **Yes**, to Print the Lab Prescription in the prescription

- **<u>Vitals(yes\No)</u>** - Click **Yes**, to Print Vitals on the prescription

1. Blood Pressure **(Yes\No) -** Click **Yes,** To Print Blood Pressure on the Prescription.
2. Blood Sugar (**Yes\No) -** Click **Yes,** To Print Blood sugar on the Prescription.
3. Weight (**Yes\No) -** Click **Yes,** To Print Weight on the Prescription.
4. HBA1C (**Yes\No)-** Click **Yes,** To Print HBA1C on the Prescription.
5. Pulse Rate (**Yes\No)-** Click **Yes,** To Print Pulse Rate on the Prescription.
6. ECG (**Yes\No) -** Click **Yes,** To Print ECG on the Prescription.
7. Temperature (Yes\No) **-** Click **Yes,** To Print Temperature on the Prescription.

- **<u>Diagnosis and Observations (Yes\No)</u>** - Click **Yes,** To Print Diagnosis on the Prescription.

1. Current Complaints (**Yes\No) -** Click **Yes,** To Print Current Complaints On the Prescription

2. Diagnosis (**Yes\No) -** Click **Yes,** To Print Diagnosis on the Prescription

3. Investigations (**Yes\No) -** Click **Yes,** To Print Investigations on the Prescription

4. Observation (**Yes\No) -** Click **Yes,** To Print Observation on the Prescription
5. Procedure (**Yes\No) -** Click **Yes,** To Print Procedure on the Prescription
6. Instructions (**Yes\No) -** Click **Yes,** To Print Instructions on the Prescription
7. Notes (**Yes\No) -** Click **Yes,** To Print Notes on the Prescription
8. Examination Findings (**Yes\No) -** Click **Yes,** To Print Examination Findings on the Prescription
9. Advice (**Yes\No) -** Click **Yes,** To Print Advice on the Prescription
10. Counseling (**Yes\No) -** Click **Yes,** To Print Counseling on the Prescription
11. Lab findings (**Yes\No) -** Click **Yes,** To Print Lab findings on Prescription
12. X-Ray Findings (**Yes\No) -** Click **Yes,** To Print X-Ray Findings on the Prescription
13. Review Notes (**Yes\No) -** Click **Yes,** To Print Review Notes on the Prescription

- **Exercise (yes\No)** - Click **Yes**, to Print Vitals on the prescription.

- **Diet (yes\No)** - Click **Yes**, to Print Vitals on the prescription.

- **Next Appointment Date (yes\No)** - Click **Yes**, to Print Vitals on the prescription

- **Customize Text(Yes\No)**, Click **Yes,** to Print the Customize Text on the Prescription. Then, **Click on the Arrow** icon on the "**Customize Text**" and new columns will appear.
  1. Customize Text Box - Enter the text you want to print on Prescription.

- **Signature(Yes\No)**, Click **Yes,** to Print the Signature on the Prescription. Then, **Click on the Arrow** icon on the "**Signature**" and new columns will appear.

1. Doctor Name (**Yes\No) - Click Yes,** To Print Doctor Name on the signature.
2. National Provider Identifier (NPI) - (**Yes\No) - Click Yes,** To Print NPI ID on the signature.
3. Doctor Qualification (**Yes\No) - Click Yes,** To Print Doctor Qualification on the signature.
4. Logo - Choose an image to upload as a logo and print it on the prescription.
5. Signature Size - **Small\Large\Medium - Choose the Size of the Font.**

- **Assessment Report (Yes\No)**, Click **Yes,** to Print the Signature on the Prescription. Then, **Click on the Arrow** icon on the "**Assessment Report** " and new columns will appear.
    1. Assessment Details (**Yes\No) - Click Yes,** To Print Assessment Details On the Prescription
    2. LifeStyle - (**Yes\No) - Click Yes,** To Print Lifestyle Column on the prescription.
- **Case Sheet Report(yes\No)** - Click **Yes**, to Print the case Sheet Report On the prescription.

- **Pre-Morbid Conditions (yes\No)** - Click **Yes**, to Print Pre-Morbid Nutrition on the prescription.

- **Observed Nutritions (yes\No)** - Click **Yes**, to Print Observed Nutritions on the prescription

- **<u>Visual Analogue Scale (Yes\No)</u>**, Click **Yes,** to Print the Visual Analogue Scale on the Prescription. Then, **Click on the Arrow** icon on the "**Visual Analogue Scale** " and new columns will appear.
    1. Sample of Visual Pain Scale
- Click on the "**Save**" button to save the prescription print settings.

2. Procedure Print Setting:

- Click the **"Settings"** on the top right of the application.
- Click the **"Preference"** option.
- In the Drop-down List, Click the **"Print Setup"**
- In the List of Tabs on the Print Page settings page, Click the **"Procedure"** Tab to set up the Procedure Print Page.
- **<u>Procedure Print Settings (Yes\No)</u>**, Click **Yes,** to enable Procedure print settings. Then, **Click on the Arrow** icon on the "Procedure Print Settings" and new columns will appear where enter the top and bottom values of the Procedure Print Page.
- **<u>Header (Yes\No)</u>**, Click **Yes,** to Print Header on Procedure. Then, **Click on the Arrow** icon on the "**Header**" and Doctor information Columns will appear where to add the logo of the hospital by clicking **"Choose File"**
- **<u>Footer(Yes\No)</u>**, Click **Yes,** to Print Footer on Procedure. Then, **Click on the Arrow** icon on the "**Footer**" and new columns will appear where to add **Marketing Content and Other content** on the text box.
- **<u>Customize Text(Yes\No)</u>**, Click **Yes,** to Print the Customize Text on the Procedure. Then, **Click on the Arrow** icon on the "**Customize Text**" and new columns will appear.

2. Customize Text Box - Enter the text you want to print on Procedure.

❖ Click on the "**Save**" button to save the Procedure print settings.

3. Diet Print Setting:

❖ Click the **"Settings"** on the top right of the application.
❖ Click the **"Preference"** option.
❖ In the Drop-down List, Click the **"Print Setup"**
❖ In the List of Tabs on the Print Page settings page, Click the **"Diet"** Tab to set up the Diet Print Page.

❖ **<u>Diet Print Settings (Yes\No)</u>**, Click **Yes,** to enable Diet print settings. Then, **Click on the Arrow** icon on the "Diet Print Settings" and new columns will appear where enter the top and bottom values of the Diet Print Page.

❖ **<u>Header (Yes\No)</u>**, Click **Yes,** to Print Header on Diet. Then, **Click on the Arrow** icon on the "**Header**" and Doctor information Columns will appear where to add the logo of the hospital by clicking **"Choose File"**

❖ **<u>Footer(Yes\No)</u>**, Click **Yes,** to Print Footer on Diet. Then, **Click on the Arrow** icon on the "**Footer**" and new columns will appear where to add **Marketing Content and Other content** on the text box.

❖ **<u>Customize Text(Yes\No)</u>**, Click **Yes,** to Print the Customize Text on the Diet. Then, **Click on the Arrow** icon on the "**Customize Text**" and new columns will appear.

3. Customize Text Box - Enter the text you want to print on Diet.

- Click on the "**Save**" button to save the Diet print settings.

4. Medical Certificate Print Setting:

- Click the **"Settings"** on the top right of the application.
- Click the **"Preference"** option.
- In the Drop-down List, Click the **"Print Setup"**
- In the List of Tabs on the Print Page settings page, click the **"Medical Certificate"** Tab to set up the Medical Certificate Print Page.

- **Medical Certificate Print Settings (Yes\No)**, Click **Yes,** to enable Medical Certificate print settings. Then, **Click on the Arrow** icon on the " Medical Certificate Print Settings" and new columns will appear where enter the top and bottom values of the Medical Certificate Print Page.

- **Header (Yes\No)**, Click **Yes,** to Print Header on Medical Certificate. Then, **Click on the Arrow** icon on the "**Header**" and Doctor information Columns will appear where to add the logo of the hospital by clicking **"Choose File"**

- **Footer(Yes\No)**, Click **Yes,** to Print Footer on Diet. Then, **Click on the Arrow** icon on the "**Footer**" and new columns will appear where to add **Marketing Content and Other content** on the text box.

- **Customize Text(Yes\No)**, Click **Yes,** to Print the Customize Text on the Medical Certificate. Then, **Click on the Arrow** icon on the "**Customize Text**" and new columns will appear.
    4. Customize Text Box - Enter the text you want to print on a Medical Certificate.

- Click on the "**Save**" button to save the Medical Certificate print settings.

12. Case Sheet:

12.1 Objective:

The objective of the **"Case Sheet"** Menu is,

b) To Customize the Case sheet with required fields by adding Case Sheet Layout and Tabs.

1. Case Sheet Layout Setting.
2. Case Sheet Tab Configuration.

12.2. Implementation Process Flow.

1. Case Sheet Layout Setting.

- Click the **"Settings"** on the top right of the application.
- Click the **"Preference"** option.
- In the Drop-down List, Click the **"Case Sheet"**
- Select the **Case Sheet Setting** tab, Select the **Branch** you want, Select the **Doctor, Select the Case sheet** One by One, and Click **"Add".**
- Once you selected all the Case Sheets, Click the **"Save"** button to Save the Case Sheet.
- You can delete the case sheet if you want, by using the Delete button in the Case Sheet List.

2. CaseSheet Tab Configuration.

- Click the **"Settings"** on the top right of the application.
- Click the **"Preference"** option.
- In the Drop-down List, Click the **"Case Sheet"**
- Select the **Case Sheet Tab Setting** tab, Select the **Branch** you want, Select the **Doctor** and **Select the Case sheet type**, **Select the Tabs** you want to configure, and select the **Tab sections** One by One and Configure the settings as per your need.

- ❖ Once you Configure all the Settings, Click the **"Submit"** button to Save the Configuration.

Chat Configuration:

13.1 Objective:

The objective of the **"Chat Configuration"** Menu is,

c) To Activate\De-Activate the Doctor-Patient Chat Forum.

13.2. Implementation Process Flow.

1. To Set Up Chat Configuration.

- ❖ Click the **"Settings"** on the top right of the application.
- ❖ Click the **"Preference"** option.
- ❖ In the Drop-down List, Click the **"Chat Configuration"**
- ❖ In the Chat Configuration, Select the **Branch** you want, and Select the **Doctor Name** to get the list of Patients Connected on the chat forum with the Selected Doctor.
- ❖ From the list of Patients, you can activate the chat using **On\Off Button**.

Section 5: User.

13. Add User:

14.1. Add Users:

The objective of the **"Add User** Menu is,

b) to create a new user and with the required information

1. Create A New User.

14.2. Pre-Requisites. (Information):

- ❖ **Need the below information to create a new User.**

User Details:

1. Name.*
2. Specialty *
3. **Add more**(Button) - To create a new specialty.
4. National Provider Identifier(**NPI**)*
5. Qualification*
6. Date of Birth.*
7. Age*
8. Gender*
9. Photo*
10. Hospital Branch.*
11. Role*
12. Service Provider (Map to New Service Provider)
13. Designation*
14. Department*
15. Sub-Department*
16. The number of Free Visits
17. Description.

Permanent Address:

18. Line 1*
19. Line 2*
20. Place*
21. Country*
22. State*
23. City*

Current Address:

24. Line 1*

25. Line 2*
26. Place*
27. Country*
28. State*
29. City*

Check Box - Tick the box if your present address is the same as your Permanent Address

Contact Details:

30. Mobile Number*
31. Alternative Mobile Number*
32. Email ID*
33. Marital Status.*

Previous Experience:

Experience (Yes\No) - Click "**Yes**" if the user has previous experience.

If Experience is "**Yes**", add the below information.

1. Concern Name (Hospital\Organization Name)
2. Experience in Months.

Click "**Add**" to save the experience.

Resume Upload - Upload the resume of the User in the given format.

- ❖ Click "**Submit**" to Save the User.

- ❖ You can View, Add Discounts and Delete the User on the Privileges Page (List of Users)

14.3. Implementation Process Flow.

1. To Create a New User.

- Click the **"Settings"** on the top right of the application.
- Click the **"User"** Option.
- In the Drop-down List, Click the **"Add Users"**
- On the Add User Page, Enter the required information, and click **"Submit"** to Save the User.
- You can View, Add Discount and Delete the User on the Privileges Page (List of Users)

Role Rights:

15.1. Add Users:

The objective of the **"User Role Rights** Menu is,

c) To add role rights to the created Users.

15.2. Implementation Process Flow.

1. To Add Role Rights to the User.

- Click the **"Settings"** on the top right of the application.
- Click the **"Users"** Option.
- In the Drop-down List, Click the **"Role Rights"**
- In the User Role Rights, Select the **Branch** you want, Select the **Role** to get the list of rights with the Active\In-Active Button
- From the List, Add you can Activate\Deactivate the User rights to the respective Forms and also you can give access to **Add, Delete, Edit, View, and Functions by tick the box.**
- Once you complete the process, click "**Submit**" at the end of the page to save the User role rights.

User Role Creation:

16.1. Add Users:

The objective of the **"User Role Creation"** Menu is,

d) To add a new Role to Map the User to the role.

16.2. Implementation Process Flow.

1. To Add New User Role

- ❖ Click the **"Settings"** on the top right of the application.
- ❖ Click the **"Users"** Option.
- ❖ In the Drop-down List, Click the **" Role Creation"**
- ❖ In the User Role Creation, Select the **Branch** you want Enter the **Role Name*** and Click "**Create**" to create the role.
- ❖ From the List, Add you can Activate\De-activate the Role.

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