Fiap Systems

HOSPITAL / MEDITECH

How to use Hospital / MediTech

A practical, module-by-module guide for your team.

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Contents

01 Platform Overview

Learn what Fiap Systems is and how to navigate the platform.

What is Fiap Systems?

Fiap Systems is a production-grade, multi-tenant SaaS platform for managing businesses across eight industries: Retail, School, Hospital, Restaurant, Bakery, Hotel, Car Rental, and Event Rental. Each business type gets a specialized template with industry-specific modules, while sharing core features like team management, payroll, analytics, and multi-branch support.

- 8 business templates with specialized modules
- Multi-tenant architecture — each business is fully isolated
- Role-based access control (RBAC) with 13 role types
- Bilingual support (English & French)
- Mobile app portals for students, parents, and patients
- Dark mode and light mode with premium UI

Choosing Your Template

When your business account is created, a template is applied that determines which modules appear in your sidebar. Here are the available templates:

Template	Best For	Key Modules
Retail Store	Shops, supermarkets, general retail	POS, Inventory, Customers, Sales
Edutech System	Schools, training centers, academies	Students, Teachers, Fees, Attendance, Results, Promotions
Meditech System	Hospitals, clinics, medical centers	Patients, Doctors, Appointments, Lab Tests, Pharmacy
Restaurant	Restaurants, snack bars, cafes	Tables, Menu, Orders, Kitchen Display (KDS)
Bakery	Bakeries, pastry shops	Ingredients, Recipes, Production, Waste Tracking
Hotel / Lodge	Hotels, lodges, rental properties	Properties, Rooms, Guests, Bookings, Housekeeping
Car Rental System	Car rental agencies, chauffeur services	Fleet, Vehicles, Bookings, Rates, Maintenance, Damages
Event Management System	Event planners, rental agencies	Equipment, Packages, Quotes, Deliveries, Bookings

Navigating the Dashboard

Once logged in, you'll see your main dashboard. Here's how the interface is organized:

1. **Sidebar Navigation**
   The left sidebar contains links to all your modules. It's organized into sections relevant to your template. On mobile, tap the hamburger menu (☰) to open it.
2. **Top Bar**
   The top bar shows your business name, notification bell, theme toggle (light/dark), language switcher, and your profile menu.
3. **Dashboard Overview**
   The main dashboard displays key metrics — revenue, sales, stock alerts, and template-specific stats like today's appointments (hospital) or attendance rate (school).
4. **Quick Actions**
   Most dashboards have quick-action buttons for common tasks like 'New Sale', 'Add Product', or 'Add Customer'.

Tip: Use keyboard shortcut Escape to close any modal or sidebar overlay.

02 First-Time Setup

Configure your business profile, branding, and essential settings.

Logging In

1. **Open the Login Page**
   Navigate to your Fiap Systems URL. You'll see the login screen with the tagline 'Control Your Business From Anywhere'.
2. **Enter Credentials**
   Use the email and password provided by your administrator. For POS terminals, use the Quick PIN login with your Business ID and PIN code.
3. **Select Login Method**
   Toggle between 'Email & Password' (for managers/admins) and 'Quick PIN' (for cashiers/staff) using the switch at the top.

Tip: Quick PIN login is ideal for shift changes at POS terminals — it's faster than typing full credentials.

Business Profile Setup

After first login, navigate to Settings from the sidebar to configure your business:

1. **Business Name**
   Go to Settings → General. Enter your official business name. This appears on receipts, invoices, and reports.
2. **Currency**
   Select your operating currency from the dropdown. This affects all financial displays across the platform.
3. **Timezone & Date Format**
   Set your local timezone and preferred date format (DD/MM/YYYY or MM/DD/YYYY).
4. **Logo & Branding**
   Upload your business logo and set brand colors. These are used in receipts, reports, and the dashboard header.
5. **Language**
   Choose English or French. The entire interface, including labels, buttons, and notifications, will switch to your selected language.

Theme Preferences

Fiap Systems supports both light and dark modes:

1. **Toggle Theme**
   Click the sun/moon icon in the top bar to switch between light and dark mode. Your preference is saved automatically.

Note: Theme preference is stored per-browser. Each user can have their own preferred theme.

03 Roles & Permissions

Understand the role hierarchy and what each role can access.

Role Hierarchy

Fiap Systems uses Role-Based Access Control (RBAC). Each user is assigned one role that determines what they can see and do. Roles are additive — higher roles always have more permissions.

Role	Access Level	Best For
Super Admin	Full platform control across all tenants	Platform operators
Owner	Full tenant access, user management	Business owners
Admin	Almost everything, no tenant management	Senior managers
Manager	Day-to-day operations, no user management	Branch/shift managers
Staff	Limited operational — view + create, no delete	General staff
Cashier	POS-only — sales and customer viewing	POS terminal operators
Teacher	Academic access — attendance, grading, results	School teachers
Doctor	Clinical access — patients, appointments, records	Physicians
Nurse	Clinical support — vitals, lab, pharmacy	Nursing staff
Baker	Production — ingredients, recipes, batches, waste	Bakery production staff
Student	Read-only — own records, fees, attendance	Students (portal)
Parent	Read-only — child's data, can make fee payments	Parents (portal)
Patient	Read-only — own records, appointments, bills	Patients (portal)

Permission Format

Permissions follow the pattern module:action. For example: customers:create, inventory:view, sales:delete. Medical modules use a three-part format: medical:patients:create.

Warning: Only Owner and Admin roles can create, edit, or delete other users. Managers and below cannot manage team members.

Template-Specific Roles

Some roles are only relevant for specific templates:

- Teacher, Student, Parent — Edutech template only
- Doctor, Nurse, Patient — Meditech template only
- Baker — Bakery template only
- Cashier — Available in Retail, Restaurant, and Bakery

Tip: When adding a team member, only roles relevant to your current template are shown in the dropdown.

04 Team Management

Add, manage, and configure your team members with roles and payroll.

Adding Team Members

Navigate to Team from the sidebar to manage your staff. The team page shows all members with their roles, status, and branch assignments.

1. **Click 'Add Employee'**
   Click the 'Add Employee' button at the top right of the team page.
2. **Fill Basic Info**
   Enter the member's full name and email address. The email will be used for login credentials.
3. **Assign a Role**
   Select the appropriate role from the dropdown (Owner, Admin, Manager, Staff, Cashier, or template-specific roles like Teacher, Doctor, Baker).
4. **Set Password**
   Enter a temporary password. The member can change this after first login.
5. **Configure Salary (Optional)**
   Enter the base salary amount. This links directly to the payroll system.
6. **Set Quick PIN (Optional)**
   Assign a 4-6 digit PIN for fast POS terminal access. Ideal for Cashier and Staff roles.
7. **Assign Branch**
   If you have multiple branches, select which branch this member belongs to.

Tip: For POS staff, always set up both email/password AND a Quick PIN. The PIN allows fast shift changes without full credential entry.

Managing Existing Members

1. **View Team Directory**
   The team page shows all members in a searchable, filterable table. Use the search bar to find by name or email.
2. **Filter by Role or Branch**
   Use the dropdown filters to show only specific roles (e.g., all Managers) or members at a specific branch.
3. **Edit a Member**
   Click the edit icon on any row to update their details — name, email, role, salary, or branch assignment.
4. **Reset Password**
   Click the three-dot menu → Reset Password to set a new temporary password for a member.
5. **Deactivate a Member**
   Click the three-dot menu → Deactivate to prevent a member from logging in without deleting their record.

Warning: You cannot deactivate your own account or accounts with a role equal to or higher than yours.

Payroll Configuration

Each team member's salary is configured from their profile and feeds directly into the payroll system:

- Base Salary — The gross monthly salary amount
- Tax Percentage — Withholding tax rate applied to gross
- Employer Contribution — Additional employer social contributions
- Bank Details — Bank name and account number for payslips
- Allowances — Additional allowances added on top of base salary

Note: Changes to salary configuration take effect on the next payroll run. Past payroll records remain unchanged.

05 Payroll

Run monthly payroll, generate payslips, and track payment history.

Payroll Overview

The payroll module lets you process monthly salaries for all team members with configured salary data. Navigate to the Payroll page from the sidebar.

- Monthly payroll processing with automatic calculations
- Tax withholding and employer contributions
- Individual payslip generation and printing
- Monthly payroll report with totals
- Automatic expense tracking (payroll expenses auto-logged)

Running Payroll

1. **Navigate to Payroll**
   Click 'Payroll' in the sidebar. You'll see the payroll dashboard with summary stats: employees with salary, estimated monthly gross, and latest run status.
2. **Select Month & Year**
   Use the month and year selectors to choose the pay period you want to process.
3. **Click 'Run Payroll'**
   Click the 'Run Payroll' button. The system calculates gross salary, tax deductions, employer contributions, and net pay for each employee.
4. **Review the Breakdown**
   A detailed table appears showing each employee's gross, tax, social contributions, total deductions, and net pay.
5. **Mark as Paid**
   Once payments are made, click 'Mark as Paid' to finalize the payroll run. This action cannot be undone.

Warning: Ensure all employee salary data is up-to-date before running payroll. Changes after the run won't retroactively update.

Payslips

Generate and print individual payslips for any employee from a completed payroll run:

1. **Open Payroll Details**
   Click 'View Details' on any completed payroll run to see the full breakdown.
2. **Click 'Payslip'**
   Click the 'Payslip' button next to any employee's row.
3. **Print or Save**
   The payslip opens in a print-friendly format. Use Ctrl+P (or Cmd+P on Mac) to print or save as PDF.

Tip: Use 'Print Monthly Report' to generate a summary report of all employees for the selected month — great for accounting records.

06 Shifts & Clock-in

Schedule staff shifts, track clock-in and clock-out times, manage shift swaps, and monitor attendance in real time.

Overview

The Shifts & Clock-in module gives you full control over employee scheduling and time tracking. Create recurring or one-off shifts, allow employees to clock in and out from their devices, and review attendance data at a glance. Managers can approve shift swaps and monitor real-time coverage to ensure every position is staffed.

- Create and publish weekly or monthly shift schedules
- Real-time clock-in and clock-out tracking with timestamps
- Shift swap requests with manager approval workflow
- Overtime detection and automatic alerts
- Attendance dashboard with daily, weekly, and monthly views
- Break tracking and compliance with labor regulations
- Export attendance reports for payroll integration

Tip: Publish shift schedules at least one week in advance so employees have time to request swaps if needed.

Creating a Shift Schedule

Build shift schedules for your teams by assigning employees to specific time slots. You can create individual shifts or use templates for recurring patterns.

1. **Open the Shifts module**
   Navigate to Human Resources → Shifts & Clock-in from the main menu.
2. **Select the schedule period**
   Choose the week or month you want to schedule using the date picker at the top of the calendar view.
3. **Add a new shift**
   Click 'Add Shift' and select the employee, date, start time, end time, and assigned role or position.
4. **Use templates for recurring shifts**
   Click 'Apply Template' to load a saved schedule pattern. Templates can cover an entire week and be reused across periods.
5. **Publish the schedule**
   Once all shifts are assigned, click 'Publish' to notify employees of their upcoming schedule via email or in-app notification.

Note: Unpublished schedules are only visible to managers. Employees will not see their shifts until the schedule is published.

Clock-in & Clock-out

Employees can record their working hours by clocking in at the start of a shift and clocking out when it ends. The system captures exact timestamps for accurate attendance records.

1. **Clock in**
   On the employee dashboard, click the 'Clock In' button when starting your shift. The system records the exact time and marks you as present.
2. **Start and end breaks**
   Use the 'Start Break' and 'End Break' buttons to log break periods. Break time is tracked separately from working hours.
3. **Clock out**
   Click 'Clock Out' at the end of your shift. The total hours worked, including any breaks, are calculated automatically.
4. **Review your timesheet**
   Visit the 'My Timesheet' section to see a summary of all your clock-in and clock-out records for the current pay period.

Warning: If an employee forgets to clock out, a manager must manually close the shift. Unclosed shifts are flagged in the attendance report.

Managing Shift Swaps

Employees can request to swap shifts with a colleague. The swap must be approved by a manager to ensure proper coverage and compliance with scheduling rules.

1. **Request a swap**
   From your schedule view, click on the shift you want to swap and select 'Request Swap'. Choose an available colleague to swap with.
2. **Colleague accepts or declines**
   The colleague receives a notification and can accept or decline the swap request from their dashboard.
3. **Manager approval**
   Once the colleague accepts, the swap request goes to the manager for final approval. The manager reviews coverage and approves or rejects the swap.
4. **Schedule updates automatically**
   Upon approval, both employees' schedules are updated automatically and notifications are sent to confirm the change.

Tip: Encourage employees to request swaps at least 48 hours before the shift to give managers time to review and ensure adequate staffing.

07 Leave Management

Handle leave requests, approval workflows, leave balances, and different leave types including annual, sick, and personal leave.

Overview

The Leave Management module streamlines how your organization handles employee time off. Employees can submit leave requests directly from their dashboard, managers receive instant notifications for approval, and HR can track leave balances and accruals across the entire company. The system supports multiple leave types and enforces your organization's leave policies automatically.

- Submit and track leave requests with real-time status updates
- Configurable leave types: annual, sick, personal, maternity, paternity, and custom
- Automatic leave balance calculation and accrual tracking
- Multi-level approval workflow with delegation support
- Team calendar showing who is on leave at any given time
- Leave policy enforcement with blackout dates and minimum notice periods
- Carry-over rules for unused leave at year end
- Exportable leave reports for compliance and payroll

Tip: Set up leave policies and types before the start of the fiscal year so that balances are calculated correctly from day one.

Configuring Leave Types

Before employees can request time off, administrators must configure the leave types available in the organization. Each type can have its own accrual rules, balance limits, and approval requirements.

1. **Navigate to Leave Settings**
   Go to Human Resources → Leave Management → Settings to access the leave configuration panel.
2. **Add a new leave type**
   Click 'Add Leave Type' and enter the name (e.g., Annual Leave, Sick Leave), the annual entitlement in days or hours, and whether it requires documentation.
3. **Set accrual rules**
   Choose how leave is accrued: all at once at the start of the year, monthly, or per pay period. Configure carry-over limits for unused days.
4. **Define approval workflow**
   Specify who approves requests for this leave type. Options include direct manager, HR manager, or a custom approval chain.
5. **Save and activate**
   Click 'Save' to activate the leave type. It will immediately be available for employees to select when submitting requests.

Note: You can deactivate a leave type at any time without deleting it. Existing requests with that type will remain in the system.

Submitting a Leave Request

Employees can request time off in just a few clicks. The system checks balances automatically and routes the request through the configured approval workflow.

1. **Open the Leave Request form**
   From your dashboard, click 'Request Leave' or navigate to Human Resources → Leave Management → New Request.
2. **Select the leave type**
   Choose the type of leave from the dropdown (e.g., Annual Leave, Sick Leave). Your remaining balance for that type is displayed.
3. **Choose the dates**
   Select the start and end dates for your leave. The system calculates the number of working days, excluding weekends and public holidays.
4. **Add a reason or attachment**
   Optionally provide a reason for the leave and attach supporting documents such as a medical certificate if required.
5. **Submit the request**
   Click 'Submit' to send the request to your approver. You will receive a notification when the request is approved or declined.

Warning: Submitting a leave request does not guarantee approval. Do not make travel plans until your request has been officially approved.

Approving and Managing Requests

Managers and HR personnel can review, approve, or reject leave requests from a centralized queue. The team calendar helps identify potential coverage gaps before approving.

1. **Review pending requests**
   Go to Leave Management → Pending Approvals to see all requests awaiting your decision. Each request shows the employee, dates, leave type, and remaining balance.
2. **Check the team calendar**
   Click 'Team Calendar' to see an overview of who else is on leave during the same period. This helps ensure adequate team coverage.
3. **Approve or reject**
   Click 'Approve' or 'Reject' on each request. If rejecting, provide a reason so the employee understands why.
4. **Monitor balances**
   Use the 'Leave Balances' report to view all employees' remaining leave days by type. This report can be filtered by department or team.

Tip: Use the team calendar view regularly to anticipate periods of low staffing and plan accordingly.

08 Purchase Orders

Create purchase orders for suppliers, track order status through fulfillment, and manage goods receiving with full audit trails.

Overview

The Purchase Orders module manages your entire procurement process from requisition to receiving. Create purchase orders for your suppliers, track order status in real time, and record goods received against each order. The system maintains a full audit trail of every change and integrates seamlessly with your inventory and accounting modules.

- Create and send purchase orders to suppliers with itemized line details
- Track order status: Draft, Sent, Partially Received, Fully Received, Cancelled
- Goods receiving with quantity verification and quality notes
- Automatic inventory updates when goods are received
- Supplier management with contact details and order history
- Purchase order approval workflow for budget control
- PDF generation and email delivery of purchase orders to suppliers
- Integration with accounting for automatic expense recording

Tip: Link your supplier catalog to the Purchase Orders module so that item details, prices, and lead times auto-populate when creating new orders.

Creating a Purchase Order

Start the procurement process by creating a purchase order that specifies the items, quantities, and prices you need from a supplier.

1. **Open the Purchase Orders module**
   Navigate to Supply Chain → Purchase Orders from the main menu.
2. **Click 'New Purchase Order'**
   Start a new PO. Select the supplier from your supplier list or create a new supplier record on the spot.
3. **Add line items**
   Add each product or material you want to order. Specify the item name, SKU, quantity, unit price, and any applicable tax or discount.
4. **Set delivery details**
   Enter the expected delivery date, shipping address, and any special delivery instructions for the supplier.
5. **Submit for approval**
   If your organization requires PO approval, click 'Submit for Approval'. Otherwise, click 'Confirm' to finalize and send the PO directly to the supplier.

Note: Purchase orders in Draft status can be edited freely. Once a PO is Confirmed or Sent, changes require creating an amendment.

Receiving Goods

When a shipment arrives from a supplier, record it against the corresponding purchase order. The system supports partial receipts for orders that arrive in multiple shipments.

1. **Locate the purchase order**
   Go to Purchase Orders and find the PO you are receiving goods for. You can search by PO number, supplier name, or date.
2. **Click 'Receive Goods'**
   Open the receiving form for the PO. Each line item is listed with the ordered quantity and any previously received quantity.
3. **Enter received quantities**
   For each line item, enter the quantity actually received. If any items are damaged or missing, note the discrepancy in the comments field.
4. **Confirm receipt**
   Click 'Confirm Receipt' to update the PO status. Inventory levels are updated automatically, and the PO moves to Partially Received or Fully Received.

Warning: Always verify quantities physically before confirming receipt in the system. Confirmed receipts update inventory balances immediately and cannot be easily reversed.

Tracking and Reporting

Monitor all purchase orders across their lifecycle and generate reports to analyze procurement spend and supplier performance.

1. **Use the PO dashboard**
   The Purchase Orders dashboard shows all orders organized by status. Use filters to view orders by supplier, date range, or amount.
2. **View order history**
   Click on any PO to see its full history including creation, approval, sending, and receiving events with timestamps.
3. **Generate procurement reports**
   Go to Reports → Procurement to generate spend analysis by supplier, category, or time period. Identify your top suppliers and spending trends.

Tip: Review the 'Open Purchase Orders' report weekly to follow up on overdue deliveries and keep your supply chain running smoothly.

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09 Expense Tracking

Record, categorize, and report on all business expenses.

Recording Expenses

1. **Navigate to Expenses**
   Click 'Expenses' in the sidebar.
2. **Click 'Add Expense'**
   Enter the amount, date, category, vendor name, and optional description.
3. **Select Category**
   Choose from: Rent, Utilities, Salary, Payroll, Operations, Supplies, Transport, Marketing, Maintenance, Taxes, Insurance, or Other.
4. **Save**
   The expense is recorded and appears in the expense table and analytics.

Note: Payroll expenses are automatically generated when you run payroll — no need to enter them manually.

Expense Reports

- View total expenses by period (daily, weekly, monthly, yearly)
- Category breakdown with percentages
- Filter by category, date range, or vendor
- Export expense data to CSV for accounting

10 Accounting

Manage your chart of accounts, record journal entries, maintain the general ledger, and ensure accurate double-entry bookkeeping.

Overview

The Accounting module is the financial backbone of your organization. It provides a complete double-entry bookkeeping system with a customizable chart of accounts, journal entries, and a general ledger. Every financial transaction across the platform — from invoices to expenses to payroll — flows into the accounting module, giving you a single source of truth for your financial data.

- Customizable chart of accounts organized by category (assets, liabilities, equity, revenue, expenses)
- Double-entry journal entries with automatic balancing validation
- General ledger with drill-down to individual transactions
- Trial balance, income statement, and balance sheet generation
- Multi-currency support with automatic exchange rate conversion
- Fiscal year and period management with period locking
- Automated entries from sales, purchases, payroll, and expenses
- Audit trail for every financial transaction

Warning: Accounting data affects financial reporting and tax compliance. Ensure that only authorized users have access to create or modify journal entries.

Setting Up the Chart of Accounts

The chart of accounts defines the structure of your financial records. Set it up carefully as it forms the foundation for all financial reporting.

1. **Access the Chart of Accounts**
   Navigate to Finance → Accounting → Chart of Accounts to view and manage your account structure.
2. **Review default accounts**
   The system comes with a standard chart of accounts. Review each account to ensure it fits your business structure. Common categories include Cash, Accounts Receivable, Inventory, Revenue, and Cost of Goods Sold.
3. **Add custom accounts**
   Click 'Add Account' to create a new account. Specify the account code, name, type (asset, liability, equity, revenue, or expense), and parent account if applicable.
4. **Organize account hierarchy**
   Arrange accounts in a logical hierarchy using parent-child relationships. This makes financial reports easier to read and analyze.
5. **Set opening balances**
   For existing businesses, enter opening balances for each account as of your go-live date. This ensures your ledger starts with accurate figures.

Tip: Use a consistent numbering scheme for account codes (e.g., 1000s for assets, 2000s for liabilities, 3000s for equity, 4000s for revenue, 5000s for expenses) to keep your chart organized.

Recording Journal Entries

Journal entries are the building blocks of double-entry bookkeeping. Every transaction is recorded as a balanced entry with equal debits and credits.

1. **Create a new journal entry**
   Go to Accounting → Journal Entries → New Entry. Enter the date, a descriptive reference or memo, and select the journal (e.g., General, Sales, Purchases).
2. **Add debit and credit lines**
   For each line, select the account, enter the amount, and specify whether it is a debit or credit. The total debits must equal total credits for the entry to be valid.
3. **Attach supporting documents**
   Upload receipts, invoices, or other documentation to support the journal entry. This helps during audits and reviews.
4. **Post the entry**
   Click 'Post' to record the entry in the general ledger. Posted entries update account balances immediately.

Note: Many journal entries are created automatically by other modules. For example, confirming a sale creates a revenue entry, and recording an expense creates an expense entry. Manual journal entries are typically used for adjustments, corrections, and non-routine transactions.

Automated Ledger Sync

The Accounting module is seamlessly integrated with all operational modules. When financial transactions occur across the platform, the Ledger Sync engine automatically posts balanced double-entry journal entries in real time.

1. **Sales & POS**
   Completing a sale automatically debits Cash and credits Sales Revenue. Refunds reverse this entry automatically.
2. **Expenses**
   Creating an expense debits the specific expense category account (e.g., Rent, Utilities) and credits Cash.
3. **Rentals & Bookings**
   Checking out a car rental, event equipment, or property booking debits Cash and credits Service Revenue.
4. **School Fees**
   Recording a fee payment from a student automatically debits Cash and credits Fee Revenue.

Tip: Automated entries contain a reference link back to the original operational record (e.g., the specific Sale or Booking ID) for easy auditing.

Financial Reports

Generate essential financial reports to understand your business's financial position and performance at any point in time.

1. **Generate a Trial Balance**
   Go to Reports → Trial Balance to see a summary of all account balances. Use this to verify that total debits equal total credits across the ledger.
2. **View the Income Statement**
   Navigate to Reports → Income Statement (Profit & Loss) to see revenue and expenses for a selected period. This shows whether your business is profitable.
3. **Review the Balance Sheet**
   Go to Reports → Balance Sheet to see a snapshot of assets, liabilities, and equity at a specific date. This shows your company's financial position.
4. **Drill down into accounts**
   Click on any account in a report to see the individual transactions that make up the balance. This is useful for investigating discrepancies.

Tip: Close each fiscal period after reconciliation to prevent accidental posting. Locked periods protect the integrity of your historical financial data.

11 Analytics & Reports

View dashboards, financial summaries, and export business data.

Dashboard Analytics

The Analytics page provides visual charts and summaries of your business performance:

- Revenue trend — line chart showing daily/weekly/monthly revenue
- Top selling products — ranked list with quantities sold
- Sales by category — pie/bar chart breakdown
- Expense distribution — category-wise expense breakdown
- Monthly financial data — detailed table with revenue, expenses, and net income
- Payroll breakdown — gross salary, deductions, and net paid by month

Exporting Data

1. **Navigate to Analytics**
   Click 'Analytics' in the sidebar to view all reports.
2. **Select Period**
   Use the date range picker to choose the reporting period.
3. **Export**
   Click the 'Export' button to download data as CSV. Available for sales, inventory, expenses, and payroll.

Tip: Use the 'All Time' period selector for a complete business overview.

12 AI Chat Assistant

Ask questions in plain language and let the assistant act on your business data: look things up, draft purchase orders, create records, and more.

Overview

The AI Chat Assistant is agentic, not just a Q&A bot. Ask it a question in plain language and it retrieves the answer from your data; ask it to do something and, within your role's permissions, it can actually do it by calling the same backend the rest of the platform uses. It ships with dozens of domain-specific tool files, one per business area (inventory, purchase orders, customers, sales, HR, leave requests, students, patients, and every other module in your template), so its reach follows whatever modules your business template enables.

- Natural language queries about sales, inventory, finances, and operations
- Takes real action, not just answers: creates customer records, drafts purchase orders, adjusts stock levels, and more
- Dozens of domain-specific tools covering every module your business template enables, not a fixed generic set
- Multi-turn tool use: it can chain several lookups or actions together to satisfy one request
- Context-aware starter suggestions based on your business type
- Full conversation history, saved per user and browsable from the sidebar
- Restricted to Owner, Admin, and Super Admin roles
- Every tool call is scoped to your own organization's data and enforced by the same role-based permission checks used on every other page

Tip: Be specific, including exact names, IDs, or amounts, especially when asking the assistant to create or change something, so it acts on the right record.

Asking and Instructing

Start a conversation with the assistant by typing a question or an instruction in natural language. It interprets your intent, and either retrieves data or carries out the requested action through the platform's normal backend.

1. **Open AI Chat**
   Click 'AI Chat' in the sidebar. It's only visible to Owner, Admin, and Super Admin roles; other roles won't see it listed.
2. **Type your request**
   Enter a question like 'Show me total revenue for last quarter,' or an instruction like 'Add a new customer named Jane Doe' or 'Create a purchase order for 20 units of Product X from Supplier Y.'
3. **Review the response**
   The assistant replies in your interface language (English or French). If it took an action, the change is immediately reflected in the relevant module, such as the new customer appearing in Customers.
4. **Continue the conversation**
   Ask follow-ups to refine results, or click 'New Chat' to start fresh. Past conversations are listed on the left and can be reopened or deleted at any time.

Note: The assistant only accesses data your role can already see, and it's blocked from any action your role couldn't already perform directly. If AI Chat isn't enabled for your plan, you'll see an upgrade prompt instead of the chat.

What It Can Do

Beyond answering questions, the assistant can carry out tasks across the modules enabled for your business. A few grounded examples:

- Data lookups: 'How many units of Product X are in stock?'
- Aggregations and summaries: 'What was our total revenue last month?'
- Creating records: 'Add a new customer named Jane Doe, phone 6xx xxx xxx'
- Drafting purchase orders: 'Create a purchase order for Supplier Y for 50 units of Product X'
- Updating inventory: 'Add 20 units to the stock of Product X'
- Cross-module questions that pull from more than one module in the same answer, such as sales alongside expenses
- Whatever the tool set for your business template covers, from students and attendance in a school to patients and appointments in a hospital

Tip: After the assistant creates or changes something, check the result in the relevant module (Inventory, Customers, Purchase Orders, and so on) to confirm it matches what you intended.

Best Practices

Get reliable results from the AI Chat Assistant by following these guidelines.

- Start with specific, well-defined requests rather than vague ones
- Include exact names, IDs, or time periods so the assistant acts on or reports the right data
- Use follow-up messages to refine or drill deeper instead of one long, complex request
- Verify anything the assistant creates or changes in the relevant module afterward
- Remember only Owner, Admin, and Super Admin roles can access AI Chat
- If AI Chat isn't available to you, ask your Owner or Admin. Availability depends on your plan

Warning: The assistant can create and modify real records in your business, not just report on them. Review its actions the same way you would review a teammate's work, especially for anything financial or customer-facing.

13 Messaging

Communicate with your team through internal messaging, manage conversations, and share files securely within your organization.

Overview

The Messaging module provides a built-in communication hub for your organization. Send direct messages to colleagues, create group conversations for teams or projects, and share files without leaving the platform. All messages are stored securely within your tenant and are searchable, making it easy to find past conversations and shared information.

- One-on-one direct messaging between team members
- Group conversations for teams, departments, or projects
- File sharing with drag-and-drop support for documents, images, and more
- Real-time message delivery with read receipts
- Message search across all conversations
- Rich text formatting with mentions and links
- Notification preferences for managing message alerts
- Message pinning and bookmarking for important information

Tip: Use group conversations for project-specific communication to keep discussions organized and easily accessible to all team members involved.

Sending Messages

Start communicating with your team by sending direct messages or creating group conversations. The messaging interface is designed for quick, efficient communication.

1. **Open the Messaging module**
   Click the Messaging icon in the sidebar to open the messaging panel. Your recent conversations are displayed on the left.
2. **Start a new conversation**
   Click 'New Message' and select one or more recipients from your organization's directory. For a group conversation, add multiple people.
3. **Type and send your message**
   Compose your message in the text field. Use @mentions to tag specific people, and formatting options for bold, italic, or bullet lists. Press Enter or click Send.
4. **Share files**
   Drag and drop files into the conversation or click the attachment icon to upload documents, images, or other files. Shared files are accessible to all conversation participants.

Note: Messages are delivered in real time. If a recipient is offline, they will see the message and a notification badge when they next log in.

Managing Conversations

Keep your messaging organized by managing conversations, pinning important messages, and adjusting your notification settings.

1. **Pin important messages**
   Hover over a message and click the pin icon to pin it to the top of the conversation. Pinned messages are visible to all participants and serve as quick references.
2. **Search past conversations**
   Use the search bar at the top of the messaging panel to find messages by keyword, sender, or date. Results are displayed with context so you can jump directly to the relevant conversation.
3. **Manage notifications**
   Right-click on a conversation and select 'Notification Settings' to mute, set to priority, or customize how you receive alerts for that conversation.
4. **Archive old conversations**
   Archive conversations you no longer need in your active list. Archived conversations can be found in the 'Archived' section and restored at any time.

Tip: Use the bookmark feature to save individual messages you want to revisit later. Access all your bookmarks from the 'Saved Messages' section.

14 Documents

Upload, organize, and manage business documents with folder structures, tagging, version control, and secure sharing.

Overview

The Documents module serves as your organization's central file repository. Upload and organize business documents in a structured folder hierarchy, tag files for easy discovery, and control access with granular permissions. The module supports version control so you always have access to previous versions of important files, and it integrates with other modules to attach documents directly to records like invoices, employees, or projects.

- Upload files of any type with drag-and-drop support
- Folder-based organization with unlimited nesting levels
- Tagging system for cross-cutting file categorization
- Full-text search across document names, tags, and content
- Version history with the ability to restore previous versions
- Access control with view, edit, and admin permissions per folder or file
- Document preview for common file types (PDF, images, Office documents)
- Integration with other modules for attaching files to records

Tip: Establish a clear folder structure and naming convention before your team starts uploading files. This makes documents easier to find as your repository grows.

Uploading and Organizing Files

Add files to the document repository and organize them into folders for easy access. The system handles files of any type and size within your plan's storage limits.

1. **Navigate to Documents**
Click on Documents in the sidebar to open the document manager. You'll see the root folder structure and any recently accessed files.
2. **Create folders**
Click 'New Folder' to create a folder. Name it descriptively (e.g., 'Contracts', 'HR Documents', 'Financial Reports') and choose its location in the hierarchy.
3. **Upload files**
Click 'Upload' or drag and drop files directly into the current folder. Multiple files can be uploaded simultaneously. A progress bar shows the upload status.
4. **Add tags to files**
Select a file and click 'Add Tags' to assign descriptive tags (e.g., '2025', 'Legal', 'Approved'). Tags make files discoverable through search regardless of folder location.
5. **Move or copy files**
Right-click a file and select 'Move' or 'Copy' to reorganize files between folders. Moving a file updates its location; copying creates a duplicate.

Note: Supported file previews include PDF, JPEG, PNG, GIF, Word, Excel, and PowerPoint files. Other file types can be downloaded for viewing in external applications.

Version Control

Keep track of document changes with automatic version history. Every time a file is updated, the previous version is preserved and can be restored if needed.

1. **Upload a new version**
Select an existing file and click 'Upload New Version'. Choose the updated file from your computer. The system replaces the current version and archives the old one.
2. **View version history**
Click on a file and select 'Version History' to see all previous versions with timestamps and the name of the user who uploaded each version.
3. **Restore a previous version**
In the version history, click 'Restore' next to any previous version to make it the current active version. The previously active version is archived.
4. **Compare versions**
For text-based documents, use the 'Compare' feature to see differences between two versions highlighted side by side.

Warning: Deleting a file removes all its versions permanently. Use the 'Archive' option instead if you may need the file again in the future.

Sharing and Permissions

Control who can access, view, and edit documents with flexible permission settings at both the folder and file level.

1. **Set folder permissions**
   Right-click a folder and select 'Permissions'. Assign View, Edit, or Admin access to specific users, roles, or departments. Permissions cascade to all files within the folder.
2. **Override file-level permissions**
   For sensitive files, you can set permissions directly on individual files that override the parent folder's settings.
3. **Share a file link**
   Click 'Share' on a file to generate a secure link. Configure whether the link requires authentication or can be accessed by anyone with the link, and set an expiration date.

Tip: Use role-based folder permissions for broad access control and file-level overrides only for exceptions. This keeps your permissions manageable as the team grows.

15 Workflow Automation

Create rules that fire automatically on business events, checking conditions and running actions without manual intervention.

Overview

Workflow Automation lets you define rules that run automatically when something happens in the business, a sale is made, stock runs low, a leave request is rejected, and so on. Each rule has a trigger event, optional conditions, and one or more actions. There is no visual drag-and-drop builder, rules are configured through a form with a fixed list of trigger events and JSON-based conditions and actions, which keeps them precise and predictable.

- Fixed list of real trigger events across sales, fees, appointments, lab results, inventory, leave, patients, purchase orders, payroll, and student records
- Conditions with operators: equals, not equals, greater than, greater or equal, less than, less or equal, contains, in
- Actions: in-app notification, WhatsApp message, create expense, post a journal entry, draft a purchase order, create a follow-up task, update a field on the record, or call an external webhook
- Priority ordering, and an enable/disable toggle per rule
- Run count and last-run timestamp shown on every rule
- A run log tab with the result and execution time of every firing

Tip: Start with one trigger and one simple action, confirm it fires correctly in the Run Logs tab, then add conditions or more actions.

Creating a Rule

Rules live under Workflow in the sidebar, on the Rules tab.

1. **Open Workflow**
   Click 'Workflow' in the sidebar. The Rules tab lists existing rules with their active/inactive status, priority, run count, and condition/action counts.
2. **Click 'New Rule'**
   Give the rule a name and optional description.
3. **Pick the trigger event**
   Choose from the fixed list, for example sale.created, inventory.low_stock, fee.overdue, appointment.no_show, leave.requested, patient.discharged, purchase_order.received, or student.fee_overdue.
4. **Set a priority**
   A number controlling the order rules run in when more than one matches the same event.
5. **Write the conditions (optional)**
   Enter a JSON array of conditions, for example [{"field": "amount", "operator": ">", "value": 1000}]. Leave it empty for the rule to always fire on the trigger event.
6. **Write the actions**
   Enter a JSON array of actions, for example [{"type": "notify", "title": "Alert", "message": "Sale of {{amount}}"}]. This field is required, invalid JSON is rejected before saving.
7. **Save**
   The rule becomes active immediately unless you leave the Active checkbox unticked.

Warning: Conditions and actions are entered as raw JSON, a malformed action array will be rejected on save rather than silently ignored, double-check the syntax before saving.

Managing Rules

- Toggle a rule active or inactive with one click, without deleting it
- Click 'Details' on a rule to see its conditions and actions as formatted JSON
- Edit a rule to change its trigger, conditions, actions, or priority
- Delete a rule permanently (a confirmation prompt appears first)
- The stats bar at the top shows total rules, active rules, total runs, and overall success rate

Run Logs

Switch to the Run Logs tab to see every time a rule has fired.

- Each row shows the rule name, the trigger event, the result (success, failed, or skipped), the execution time in milliseconds, any error message, and the timestamp
- Use this tab to confirm a new rule actually fires, and to diagnose a rule that isn't producing the expected notification or record

16 Settings

Configure business profile, branding, and system preferences.

Settings Configuration

- Business name and profile information
- Currency selection (affects all financial displays)
- Timezone and date format
- Language (English/French)
- Theme (Light/Dark mode)
- Logo and branding colors
- Feature toggles (analytics, audit, websocket)
- Notification preferences
- Danger zone: reset to defaults

17 Branch Management

Set up and manage multiple business locations.

Managing Branches

1. **Add Branch**
   Branches → Add Branch. Enter name, location, and assign a manager.
2. **Assign Staff**
   When adding/editing team members, select their branch from the dropdown.
3. **Branch Filtering**
   Use branch filters on team, sales, and inventory pages to view location-specific data.

18 Audit Logs

Track all system activity and changes.

Viewing Audit Logs

Navigate to Audit Log from the sidebar. Every action in the system is recorded:

- User who performed the action
- Action type (CREATE, UPDATE, DELETE)
- Entity affected (Product, Sale, Patient, etc.)
- Timestamp
- IP address
- Before/after data changes

19 Notifications

View and manage system alerts and notifications.

Notification Types

- Low stock alerts when inventory drops below threshold
- New sale confirmations
- Payment received notifications
- Appointment reminders (Hospital)
- Fee due reminders (School)
- Lab results ready (Hospital)
- Suspicious activity alerts

Managing Notifications

1. **View Notifications**
   Click the bell icon in the top bar to see recent notifications.
2. **Mark as Read**
   Click individual notifications or use 'Mark All as Read'.
3. **Notification Page**
   Navigate to Notifications in sidebar for full history with filters.

20 Hospital Overview

Complete guide to managing a hospital or clinic.

What's Included

- Patient registration with MRN auto-generation
- Doctor management with specializations
- Appointment booking and tracking
- Medical records (immutable history)
- Lab test ordering and results
- Pharmacy and prescription management
- Medical billing
- Patient Portal (mobile app)

Getting Started

1. **Add Doctors**
   Doctors → Add Doctor with name, specialization, credentials, and department.
2. **Register Patients**
   Patients → Add Patient with personal details, emergency contacts, insurance info.
3. **Book Appointments**
   Appointments → Book New. Select doctor, patient, date, time, and type.
4. **Create Records**
   After consultation, create medical records with diagnosis, treatment, and prescriptions.

21 Patient Management

Register patients, manage profiles, and track medical history.

Registering Patients

1. **Navigate to Patients**
   Click 'Patients' in the sidebar.
2. **Click 'Add Patient'**
   Fill in: name, DOB, gender, phone, email, address, emergency contact, insurance.
3. **MRN Generated**
   A Medical Record Number is auto-generated. Used for portal login.
4. **Save**
   Patient is ready for appointments, records, and billing.

Tip: Patient MRN + Phone number is used for Patient Portal login on mobile.

22 Doctor Management

Add doctors, assign departments, and manage schedules.

Adding Doctors

1. **Navigate to Doctors**
   Click 'Doctors' in the sidebar.
2. **Add Doctor**
   Enter name, specialization, credentials, department, and contact details.
3. **Save**
   Doctor gets DOCTOR role and can manage their patients' appointments and records.

23 Departments

Manage hospital departments, assign staff, and organize clinical services.

Overview

The Departments module allows you to organize your hospital or clinic into functional departments. Each department can have its own staff assignments, specializations, and operational settings. Departments are used throughout the system for appointment routing, referrals, ward assignments, and reporting.

- Create and manage hospital departments (e.g., Emergency, Cardiology, Orthopedics, Pediatrics)
- Assign doctors and nurses to specific departments
- Department head designation
- Department-specific contact information and location
- Integration with appointments (patients book by department)
- Integration with referrals (refer between departments)
- Department-level staffing reports
- Active/inactive department status management

Creating Departments

1. **Navigate to Departments**
   Click 'Departments' in the sidebar. The departments page shows a list of all existing departments with their staff counts.
2. **Click 'Add Department'**
   Click the 'Add Department' button. The department creation form opens.
3. **Enter Department Details**
   Fill in: Department Name (e.g., 'Cardiology'), Description, Floor/Building Location, Phone Extension, and Email.
4. **Set Department Head**
   Select a doctor from the staff list to serve as the department head. This person receives administrative notifications for the department.
5. **Save**
   Click 'Save'. The department is created and available for staff assignments, appointments, and referrals.

Tip: Start by creating your core departments (Emergency, Outpatient, Laboratory, Pharmacy) before adding specialized departments. This ensures the basic workflow is operational.

Assigning Staff to Departments

Assign doctors, nurses, and other clinical staff to their respective departments:

1. **Open Department**
   Click on a department from the departments list to view its details and current staff roster.
2. **Click 'Manage Staff'**
   Click the 'Manage Staff' button. A panel shows all available staff members.
3. **Assign Members**
   Select doctors and nurses to assign to this department. Staff can be assigned to multiple departments if they work across units.
4. **Set Roles**
   For each assigned member, optionally set their department-specific role or schedule notes.
5. **Save Assignments**
   Click 'Save'. The staff assignments are updated and reflected in appointment booking and referral routing.

Note: When patients book appointments for a specific department, only doctors assigned to that department appear in the available doctor list.

Department Reports

Access department-level analytics and operational data:

- Staff count and assignment overview per department
- Patient volume by department (appointments, admissions)
- Department utilization and workload distribution

- Revenue generated per department from billing data
- Filter hospital-wide reports by department for focused analysis

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24 Appointments

Book, track, and manage patient appointments.

Booking Appointments

1. **Navigate to Appointments**
   Click 'Appointments' in the sidebar.
2. **Book New**
   Select patient, doctor, date, time, and appointment type (Consultation, Follow-up, Emergency).
3. **Track Status**
   Appointments flow through: Scheduled → In Progress → Completed (or Cancelled).

25 OPD Queue

Manage the live walk-in outpatient queue: generate tokens, call patients by department, and track wait times in real time.

Overview

The OPD Queue module runs the live walk-in queue for outpatient departments. Unlike Appointments, which schedules visits in advance, OPD Queue manages patients as they arrive at the facility: it issues a queue token, lets each department call the next patient, and tracks how long people wait. The board refreshes automatically every 10 seconds so front-desk and clinical staff always see the current line.

- Queue token generation per patient and department
- Priority levels: Normal, Priority, and Emergency
- Call Next flow that pulls the next token to a chosen doctor
- Live 'Now Serving' panel per department
- Skip and recall for patients who step away and return
- Per-department stats: waiting, serving, and average wait time
- Auto-refreshing board (every 10 seconds), no manual reload needed

Generating a Queue Token

Issue a token whenever a patient arrives without a scheduled appointment:

1. **Open OPD Queue**
   Click 'OPD Queue' in the sidebar, under Clinical Care.
2. **Click 'Generate Token'**
   Use the button at the top right to open the token form.
3. **Select the Patient**
   Search and choose the patient from the patient list.
4. **Select the Department**
   Choose which department the patient needs to see.
5. **Set the Priority**
   Choose Normal, Priority, or Emergency depending on the case.
6. **Submit**
   Click 'Generate Token' to confirm. The patient's token appears in that department's waiting list.

Tip: Reserve the Emergency priority for cases that truly need to jump the line. Overusing it defeats the purpose of the queue.

Calling and Serving Patients

Each department card on the queue board has its own Call Next control:

1. **Choose a Doctor**
   Use the doctor dropdown on the department card.
2. **Click 'Call Next'**
   Pulls the next waiting token (priority and emergency cases are shown first) into the 'Now Serving' panel for that department.
3. **Complete the Visit**
   Once the consultation is done, click 'Complete' on the Now Serving panel to close out that token and free the doctor for the next call.

Note: Call Next stays disabled until a doctor is selected, so a token can't be called into an empty slot.

Skipping and Recalling

If a called or waiting patient isn't available, don't lose their place in the line:

1. **Skip a Token**
   Click 'Skip' on a waiting token if the patient isn't present when it's their turn.
2. **Recall a Skipped Token**
   Click the recall button on any skipped token to return it to the waiting list.

Warning: Skipped tokens don't disappear. They move to a separate Skipped list on the same department card so staff can recall them once the patient returns.

Department Stats

The sidebar panel on the queue board shows live totals for every department with an active queue:

- Waiting: how many tokens are currently in line
- Serving: how many patients are with a doctor right now
- Avg Wait: the average wait time in minutes for that department

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26 Vitals

Record and monitor patient vital signs during consultations and ward stays.

Overview

The Vitals module allows clinical staff to record and track patient vital signs throughout their care journey. Vital readings are linked to the patient's medical record and provide a continuous picture of their health status. Doctors, nurses, and authorized staff can all record vitals.

- Blood pressure recording (systolic/diastolic in mmHg)
- Body temperature tracking (°C or °F)
- Pulse rate measurement (beats per minute)
- Oxygen saturation monitoring (SpO_2 percentage)
- Respiratory rate logging (breaths per minute)
- Weight and height recording with BMI auto-calculation
- Timestamped entries linked to patient medical records
- Trend charts showing vital sign history over time

Recording Vital Signs

Vital signs can be recorded from a patient's profile or during an active appointment:

1. **Open Patient Profile**
   Navigate to Patients → select the patient, or open vitals from an active appointment.
2. **Click 'Record Vitals'**
   Click the 'Record Vitals' button. A form appears with fields for all standard vital measurements.
3. **Enter Measurements**
   Fill in the readings: Blood Pressure (systolic/diastolic), Temperature, Pulse Rate, Oxygen Saturation (SpO_2), Respiratory Rate, and optionally Weight/Height.
4. **Add Clinical Notes**
   Optionally add notes about the patient's condition at the time of measurement (e.g., 'Patient resting', 'Post-exercise').
5. **Save**
   Click 'Save Vitals'. The entry is timestamped and permanently linked to the patient's medical record.

Tip: For ward patients, record vitals at regular intervals (e.g., every 4–6 hours) to build a clear trend for the attending doctor.

Viewing Vital History

All recorded vitals are displayed in the patient's profile under the Vitals tab:

- Chronological list of all vital sign entries with timestamps
- Trend charts for each vital type (blood pressure, temperature, pulse, SpO_2)
- Filter by date range to focus on specific periods
- Highlight abnormal readings that fall outside normal ranges
- Export vital history for referral or external review

Warning: Vital sign entries are part of the medical record and cannot be deleted once saved. Always verify readings before saving.

27 Medical Records

Create and view immutable patient medical records.

Creating Records

1. **Open Patient Profile**
   Navigate to the patient's profile from Patients list.
2. **Add Record**
   Enter diagnosis, treatment notes, vital signs, and prescriptions.
3. **Save**
   Records are immutable — once saved, they cannot be edited or deleted for legal compliance.

Warning: Medical records are permanent and cannot be modified after saving. Double-check all entries before saving.

28 Prescriptions

Write prescriptions, manage medication lists, and provide dosage instructions.

Overview

The Prescriptions module enables doctors to create detailed medication orders for patients. Prescriptions are linked to medical records and flow directly to the Pharmacy module for dispensing. Each prescription captures the medication name, dosage, frequency, duration, and any special instructions.

- Create prescriptions linked to patient medical records
- Medication search from the facility's drug formulary
- Dosage, frequency, and duration specification
- Special instructions and administration routes (oral, IV, topical, etc.)
- Automatic routing to pharmacy for dispensing
- Prescription history visible on patient profile
- Print-ready prescription format with doctor's details
- Refill management for ongoing medications

Writing a Prescription

1. **Open the Patient Record**
   Navigate to the patient's profile or open a prescription from an active appointment or medical record entry.
2. **Click 'New Prescription'**
   Click the 'New Prescription' button. A prescription form opens with the patient's details pre-filled.
3. **Add Medications**
   Search and select medications from the formulary. For each medication, enter: Drug Name, Dosage (e.g., 500mg), Route (oral, IV, IM), Frequency (e.g., twice daily), and Duration (e.g., 7 days).
4. **Add Special Instructions**
   Enter any additional notes such as 'Take with food', 'Avoid alcohol', or 'Monitor blood sugar levels'.
5. **Review and Save**
   Review all medications and instructions. Click 'Save Prescription'. The prescription is sent to the pharmacy queue.

Tip: You can add multiple medications to a single prescription. Group related medications together for the pharmacist's convenience.

Managing Prescriptions

Track and manage all prescriptions from the Prescriptions page or patient profile:

- View all active and past prescriptions per patient
- Track dispensing status (Pending, Partially Dispensed, Fully Dispensed)
- Print prescriptions for patient records or external pharmacies
- Renew or refill prescriptions for chronic medications
- Filter prescriptions by date, doctor, or status

Note: Prescriptions are linked to the prescribing doctor's profile. Only doctors and authorized staff can create or modify prescriptions.

Prescription Printing

Generate professional printed prescriptions for patients:

1. **Open the Prescription**
   Click on any prescription from the patient's profile or the Prescriptions list.
2. **Click 'Print'**
   Click the print icon. A formatted prescription opens with the facility letterhead, doctor's name, patient details, and medication list.
3. **Print or Save as PDF**
   Use Ctrl+P to print or save. The format includes all medications, dosages, and special instructions.

29 Lab Tests

Order tests, track samples, and enter results.

Lab Workflow

1. **Order Test**
   From a patient's record, click 'Order Lab Test'. Select test type and priority.
2. **Sample Collection**
   Mark sample as collected. Track sample status.
3. **Enter Results**
   Lab staff enters results. Results are linked to the patient's medical record.

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30 Pharmacy

Manage prescriptions and dispense medications.

Pharmacy Operations

1. **View Prescriptions**
   Navigate to Pharmacy. All pending prescriptions from doctors appear here.
2. **Dispense Medication**
   Select a prescription, verify the medication, and mark as dispensed.
3. **Track Status**
   Prescriptions flow: Pending → Dispensed. Track medication inventory.

31 Allergies & Drug Interactions

Manage patient allergy records and check for drug interaction risks.

Overview

The Allergies & Drug Interactions module is a critical patient safety feature. It maintains a comprehensive record of each patient's known allergies and automatically checks for potential drug interactions when prescriptions are created. This helps prevent adverse reactions and ensures safer medication management.

- Patient allergy profile with categorized allergens
- Drug allergy records (specific medications that cause reactions)
- Food and environmental allergy tracking
- Severity classification (Mild, Moderate, Severe, Life-threatening)
- Automatic drug interaction alerts during prescription creation
- Cross-referencing with active medications
- Allergy badges visible on patient profile and during consultations
- Alert history log for auditing

Recording Patient Allergies

1. **Open Patient Profile**
   Navigate to Patients → select the patient. Go to the 'Allergies' tab on their profile.
2. **Click 'Add Allergy'**
   Click the 'Add Allergy' button. A form appears to capture allergy details.
3. **Select Allergy Type**
   Choose the category: Drug Allergy, Food Allergy, Environmental Allergy, or Other.
4. **Specify the Allergen**
   Enter or search for the specific allergen (e.g., 'Penicillin', 'Peanuts', 'Latex'). For drug allergies, search from the medication formulary.
5. **Set Severity Level**
   Select the severity: Mild (rash, itching), Moderate (swelling, difficulty breathing), Severe (anaphylaxis), or Life-threatening.
6. **Describe Reaction**
   Enter a description of the patient's known reaction (e.g., 'Develops hives within 30 minutes of ingestion').
7. **Save**
   Click 'Save'. The allergy is added to the patient's profile and will trigger alerts during future prescriptions.

> **Warning:** Always verify allergy information directly with the patient or their guardian. Inaccurate allergy records can lead to dangerous prescribing errors.

Drug Interaction Checking

When a doctor writes a prescription, the system automatically checks for conflicts:

- Real-time alerts when a prescribed drug conflicts with a known allergy
- Cross-drug interaction warnings when multiple medications may interact
- Visual warning badges on conflicting medications
- Option to override with documented clinical justification
- Interaction check history logged in audit trail

> **Tip:** Review the allergy badge on the patient header before every consultation. A red allergy indicator means the patient has recorded drug allergies that require attention.

32 Referrals

Manage patient referrals between departments, doctors, and external facilities.

Overview

The Referrals module streamlines the process of referring patients between departments, specialists, and external healthcare facilities. It ensures continuity of care by transferring relevant medical information along with the referral, and tracks the status of each referral from creation to completion.

- Internal referrals between departments within the facility
- Specialist referrals to specific doctors
- External referrals to other hospitals or clinics
- Automatic inclusion of relevant medical history and records
- Referral status tracking (Pending, Accepted, Completed, Declined)
- Priority levels (Routine, Urgent, Emergency)
- Referral notes and reason documentation
- Printable referral letters with facility letterhead

Creating a Referral

1. **Open Patient Profile**
   Navigate to the patient's profile or create a referral from an active appointment.
2. **Click 'New Referral'**
   Click the 'New Referral' button. The referral form opens with the patient's details pre-filled.
3. **Select Referral Type**
   Choose: Internal (within your facility) or External (to another hospital or clinic).
4. **Choose Destination**
   For internal referrals, select the target department and/or doctor. For external, enter the facility name, address, and contact details.
5. **Set Priority**
   Select the urgency level: Routine (standard timeline), Urgent (within 24–48 hours), or Emergency (immediate).
6. **Enter Reason and Notes**
   Describe the reason for referral, current diagnosis, treatment so far, and any specific requests for the receiving party.
7. **Attach Records**
   Select which medical records, lab results, or imaging reports to include with the referral.
8. **Save and Send**
   Click 'Save'. Internal referrals notify the receiving department. External referrals generate a printable referral letter.

Tip: For urgent referrals, use the priority flag to ensure the receiving department is notified immediately via the notification system.

Tracking Referrals

Monitor all referrals from the Referrals page in the sidebar:

- Dashboard view with counts by status (Pending, Accepted, Completed, Declined)
- Filter referrals by type (Internal/External), priority, date range, or status
- View referral details including attached records and communication history
- Receive notifications when referral status changes
- Print referral letters for external facilities

Note: Both the referring and receiving doctors can view and update the referral status. This ensures full visibility across the care team.

33 Ward & Bed Management

Set up wards, manage bed assignments, and track occupancy in real time.

Overview

The Ward & Bed Management module provides complete control over your facility's inpatient infrastructure. It allows administrators to set up wards, define bed configurations, assign patients to beds, and monitor occupancy rates in real time. This is essential for efficient hospital operations and patient flow management.

- Ward creation with type classification (General, ICU, Pediatric, Maternity, Surgical, Private)
- Bed management within each ward (number, type, status)
- Real-time bed availability and occupancy dashboard
- Patient-to-bed assignment during admission
- Bed status tracking (Available, Occupied, Reserved, Maintenance, Cleaning)
- Occupancy rate analytics and trend reporting
- Bed transfer between wards
- Automated bed release on patient discharge

Setting Up Wards and Beds

1. **Navigate to Ward Management**
   Click 'Ward Management' in the sidebar. The ward dashboard shows an overview of all wards and their occupancy.
2. **Create a Ward**
   Click 'Add Ward'. Enter: Ward Name (e.g., 'General Ward A'), Ward Type (General, ICU, Pediatric, etc.), Floor/Building, and Total Bed Capacity.
3. **Add Beds**
   Select a ward → 'Manage Beds'. Click 'Add Bed' for each bed. Enter: Bed Number, Bed Type (Standard, Electric, ICU Bed), and any equipment notes.
4. **Set Ward Policies**
   Configure visiting hours, nurse-to-patient ratios, and any ward-specific rules or notes.

Tip: Use consistent bed numbering (e.g., W1-B01, W1-B02) to make it easy for staff to locate beds quickly across the facility.

Assigning Patients to Beds

1. **Admit a Patient**
   From the patient's profile or the admissions page, click 'Admit Patient'. The bed assignment form opens.
2. **Select Ward**
   Choose the appropriate ward based on the patient's care needs. Available bed counts are shown for each ward.
3. **Choose a Bed**
   Select from available beds in the chosen ward. The visual bed map shows occupied (red), available (green), and reserved (yellow) beds.
4. **Confirm Assignment**
   Review the assignment details and click 'Confirm'. The bed status changes to 'Occupied' and the patient's profile is updated.

Note: When a patient is discharged, their bed automatically transitions to 'Cleaning' status before becoming 'Available' again.

Occupancy Dashboard

The ward dashboard provides real-time insights into facility capacity:

- Visual bed map per ward showing color-coded bed statuses
- Overall occupancy percentage across all wards
- Per-ward occupancy breakdown with available bed counts
- ICU and critical care bed availability alerts
- Average length of stay statistics by ward
- Occupancy trend charts (daily, weekly, monthly)

Warning: Monitor ICU bed availability closely. When ICU occupancy exceeds 85%, the system triggers an automatic alert to administrators.

34 Discharge Summaries

Manage the patient discharge process and generate comprehensive discharge summaries.

Overview

The Discharge Summaries module handles the complete patient discharge workflow — from initiating discharge to generating a comprehensive summary document. Discharge summaries compile the patient's hospital stay details, diagnoses, treatments, medications, and follow-up instructions into a single document for continuity of care.

- Structured discharge workflow with multi-step process
- Automatic compilation of stay details (admission date, attending doctor, ward)
- Diagnosis summary with ICD codes
- Treatment and procedure summary
- Discharge medication list with instructions
- Follow-up appointment scheduling
- Post-discharge care instructions
- Printable discharge summary with facility letterhead

Initiating a Discharge

1. **Open Patient Profile**
   Navigate to the admitted patient's profile. The 'Discharge' option is available for patients currently assigned to a bed.
2. **Click 'Initiate Discharge'**
   Click the 'Initiate Discharge' button. The discharge summary form opens with pre-filled details from the patient's stay.
3. **Review Admission Details**
   Verify the auto-populated fields: admission date, discharge date, attending doctor, ward, and bed number.
4. **Enter Diagnosis Summary**
   Document the primary diagnosis, secondary diagnoses, and any complications encountered during the stay.
5. **Add Treatment Summary**
   Summarize all treatments provided, procedures performed, and significant clinical events during hospitalization.
6. **Prescribe Discharge Medications**
   List all medications the patient should continue after discharge, including dosage, frequency, and duration.
7. **Set Follow-Up Instructions**
   Enter follow-up appointment dates, recommended tests, activity restrictions, dietary guidance, and warning signs to watch for.
8. **Finalize Discharge**
   Review the complete summary and click 'Finalize Discharge'. The patient's bed is released and the summary is saved to their record.

Warning: Ensure all outstanding bills are settled or insurance claims are filed before finalizing the discharge. The billing team should be notified before discharge.

Printing and Sharing

Generate professional discharge documents for patients and their families:

1. **Open Discharge Summary**
   From the patient's profile, go to the 'Discharge History' tab and select the discharge entry.
2. **Print Summary**
   Click 'Print'. The document includes facility letterhead, patient details, complete stay summary, medications, and follow-up instructions.
3. **Provide to Patient**
   Print two copies — one for the patient's records and one for the hospital file.

Tip: Include clear, jargon-free language in the patient care instructions section. Patients and family members should easily understand the follow-up plan.

35 Insurance

Manage patient insurance records, verify coverage, and process claims.

Overview

The Insurance module helps manage patient insurance information, verify coverage before procedures, and process insurance claims. It integrates with the billing system to automatically apply insurance coverage to patient invoices and track reimbursements.

- Patient insurance profile with policy details
- Multiple insurance plans per patient (primary, secondary)
- Coverage verification before appointments and procedures
- Insurance claim creation and submission tracking
- Claim status monitoring (Submitted, Under Review, Approved, Denied, Paid)
- Integration with medical billing for automatic coverage application
- Insurance provider directory management
- Claim reporting and reimbursement analytics

Adding Insurance Information

1. **Open Patient Profile**
   Navigate to Patients → select the patient. Go to the 'Insurance' tab.
2. **Click 'Add Insurance'**
   Click 'Add Insurance Plan'. A form appears to capture insurance details.
3. **Select Insurance Provider**
   Choose from the list of registered insurance providers, or add a new provider with company name and contact information.
4. **Enter Policy Details**
   Fill in: Policy Number, Group Number, Plan Type (HMO, PPO, etc.), Coverage Start Date, and Expiration Date.
5. **Set Coverage Limits**
   Enter the coverage percentage, deductible amount, co-pay amount, and annual maximum if applicable.
6. **Mark as Primary or Secondary**
   Indicate whether this is the patient's primary or secondary insurance plan.
7. **Save**
   Click 'Save'. The insurance information is linked to the patient and will be referenced during billing.

Tip: Always verify insurance coverage before scheduled procedures. Expired policies or exceeded limits will not be applied to bills automatically.

Processing Insurance Claims

1. **Navigate to Insurance Claims**
   Click 'Insurance' in the sidebar, then go to the 'Claims' tab.
2. **Create New Claim**
   Click 'New Claim'. Select the patient, their insurance plan, and the related invoice or services.
3. **Attach Documentation**
   Include relevant medical records, lab results, and procedure reports required by the insurer.
4. **Submit Claim**
   Review claim details and click 'Submit'. The claim status changes to 'Submitted'.
5. **Track Status**
   Monitor the claim as it progresses: Submitted → Under Review → Approved/Denied → Paid.

Warning: Submit claims promptly. Most insurance providers have filing deadlines. Late submissions may result in claim denial.

Automatic CSU Government Subsidy

Separately from the private insurance providers and claims described above, the system automatically applies Cameroon's CSU (Couverture Sante Universelle) subsidy on medical bills, no manual entry required. Children under 5 and pregnant patients (flagged with the 'Is Pregnant' checkbox on the bill) get 100% government-subsidized consultations, medications, lab tests, and treatments. The subsidized amount is calculated and tracked separately from what the patient owes.

- Applies automatically based on the patient's date of birth (under 5) or the bill's Is Pregnant flag
- Covers Consultation, Medication, Lab Test, and Treatment line items
- The subsidized amount is tracked on the bill separately from the patient's own balance
- What the patient owes (the total shown on the bill) is already net of this subsidy

Tip: The subsidized amount calculated here is what eventually gets submitted and tracked as a CSU claim on the Reimbursement Claims page. See that page to follow it through to settlement.

Insurance Reports

Generate insights on insurance activity from the Reports tab:

- Total claims submitted and approved amounts by period
- Claim approval vs. denial rates by provider
- Outstanding claims awaiting payment
- Average reimbursement time by insurance provider
- Patient coverage utilization summary

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36 Medical Billing

Create bills for services, track payments.

Creating Bills

1. **Navigate to Billing**
   Click 'Billing' in the sidebar.
2. **Create Bill**
   Select patient, add services/procedures with costs.
3. **Record Payment**
   Enter payment amount and method. Print invoice.

37 Reimbursement Claims

Prepare, submit, and track CSU / openIMIS insurance claims through settlement, and check a patient's coverage eligibility.

Overview

The Reimbursement page (labeled 'Reimbursement' in the sidebar, under Billing) manages claims submitted to CSU (Couverture Sante Universelle), Cameroon's universal health coverage scheme, through the openIMIS integration. It tracks each claim from Draft through Submitted, Acknowledged, Approved (or Rejected), to Paid, and shows how long unpaid claims have been outstanding.

- Claim status pipeline: Draft, Submitted, Acknowledged, Approved, Rejected, Partially Paid, Paid
- Aging report broken into 0-30, 31-60, 61-90, and 90+ day buckets, by count and amount
- Total outstanding amount across all unpaid claims
- Patient eligibility check against the CSU / openIMIS system
- Filter the claims list by status
- Per-claim update of status, approved amount, paid amount, and rejection reason

Warning: Until your facility's openIMIS connection is configured (the OPENIMIS_FHIR_URL setting), this page runs in sandbox mode. A banner at the top makes clear that claim and eligibility data is simulated, not live, until go-live.

Reading the Aging Report

The stat cards and bars at the top of the page show how much money is tied up in unpaid claims, and for how long:

- Total Outstanding: the full unpaid claim amount across all buckets
- 0-30 / 31-60 / 61-90 / 90+ days: each bucket shows the claim count and amount for that age range
- A bar chart visualizes the claim count in each bucket relative to the others

Tip: Watch the 90+ day bucket closely. Claims that sit that long are at higher risk of being written off or rejected on a technicality.

Checking Patient Eligibility

1. **Open the Eligibility Check Panel**
   Found below the aging bars.
2. **Enter the Patient ID**
   Type or paste the patient's ID.
3. **Click 'Check Eligibility'**
   The system queries the CSU / openIMIS system, or returns a sandbox result if not yet connected.
4. **Read the Result**
   The panel shows Eligible or Not Eligible, whether the result is Sandbox or Live, and the patient's insurance number, provider, and disposition if returned.

Managing Claims

The Claims table lists every claim with its status and amounts:

1. **Filter by Status**
   Use the status dropdown above the table to narrow the list, or leave it on 'All statuses'.
2. **Open 'Update Status'**
   Click the button on any claim's row.
3. **Set the New Status**
   Choose the claim's new status, from Draft through Paid.
4. **Enter Amounts**
   Fill in Amount Approved and/or Amount Paid as the claim progresses.
5. **Add a Rejection Reason**
   This field appears only when the status is set to Rejected. Use it to record why.
6. **Save**
   Click 'Save' to update the claim.

Note: Where the approved or paid amount for a claim comes from: the CSU subsidy automatically calculated on a patient's medical bill (see the Insurance page) is what gets submitted and tracked here as the claim moves toward settlement.

38 Ambulance Dispatch

Run the live emergency call board: verify incoming calls, assign ambulances, track the fleet, and broadcast alerts.

Overview

The Ambulance Dispatch console (found at EMS Dispatch in the sidebar, under Inpatient & Emergency) is the dispatcher's live command board for emergency medical calls. Incidents can arrive from several sources: a phone call to the facility, the SOS button in the public mobile app, WhatsApp, SMS, or a guard/security report. The board updates in real time (it listens for live events and also polls every 15 seconds) as calls are verified, ambulances are assigned, and incidents move through their full lifecycle.

- Live Board tab: triage-sorted active incidents with a map view
- Full incident lifecycle: Received, Verified, Dispatched, En Route, Responding, On Scene, Transporting, At Hospital, Resolved, Closed
- Triage levels: Critical, Urgent, Stable, shown as color-coded badges
- Priority (P1 Critical / P2 Urgent / P3 Non-urgent) and category (Trauma, Cardiac, Respiratory, Obstetric, Pediatric, Transfer, Other)
- Fleet tab: ambulance roster with per-unit status
- Broadcasts tab: send and recall town-crier style alerts to the field
- Road Status tab: report and close blocked, high-risk, or construction road segments
- Forward an incident to another branch's command centre

Receiving and Verifying a Call

New incidents can be logged by a dispatcher, or arrive automatically from the mobile app's SOS button:

1. **Log a New Incident**
   Click 'New Incident' on the Live Board tab. Fields: Location (required), Location name / landmark, Latitude, Longitude, Triage (required, default Urgent), Priority (required, default P2 Urgent), Category (required, default Other), Source (default Phone), Visibility (Public or Agency only, default Agency only), Caller Name, Caller Phone, Description.
2. **Verify the Call**
   Click 'Verify' on a Received incident once a dispatcher has confirmed it's a genuine call. The status moves to Verified.

Note: Incidents reported through the public mobile app's SOS button arrive with Source set to App and are unverified by default. The dispatcher still confirms them before assigning a unit.

Assigning and Advancing an Incident

1. **Assign an Ambulance**
   Click 'Assign Unit' on a Received or Verified incident with no ambulance yet. Pick from the list of currently available ambulances and confirm.
2. **Advance the Status**
   Click 'Advance' to move the incident through its lifecycle: Dispatched, En Route, Responding, On Scene, Transporting, At Hospital, Resolved, or Closed.
3. **Forward to Another Branch**
   Click 'Forward' to hand the case off to another branch's command centre if it falls outside your coverage area.
4. **Cancel or Mark False Alarm**
   Use 'Cancel' or 'False Alarm' to close out a call that doesn't need a response.

Warning: Closing or cancelling a call frees the ambulance assigned to it, so make sure the unit has actually finished the run before you close the incident.

Managing the Fleet

Switch to the Fleet tab to manage your ambulances:

1. **Add an Ambulance**
   Click 'Add Ambulance' and enter its Call Sign (required), Vehicle Type, Plate Number, Current Location, and any Notes.
2. **Change a Unit's Status**
   Click 'Change Status' on any ambulance row to set it to Available, Dispatched, En Route, At Scene, Transporting, At Hospital, or Out of Service.

Broadcasts and Road Conditions

Two supporting tabs help coordinate the wider response:

- Broadcasts: send a short alert message to the field and recall it when it's no longer relevant
- Road Status: report a blocked, high-risk, or construction-affected road segment with a start point, end point, and reason, then close it once the road clears

Mobile App: Public SOS and Field Response

The dispatch system connects to two screens in the mobile app:

- Emergency SOS: a large SOS button for the public. Tapping it opens a confirm sheet with a category picker (Cardiac, Trauma, Respiratory, Obstetric, Pediatric, Other), an optional description, and an optional manual location description. Submitting creates an incident on this same dispatch board
- Emergency Track: after sending an SOS, the requester can follow their incident's status from their phone
- Field responder view: ambulance crew can see their assigned incidents and advance status from the mobile app

Note: The mobile app does not use GPS for the SOS report. Location is entered as text (for example a landmark), which is why dispatchers should always verify, and where possible confirm, the exact location before assigning a unit.

39 Disease Surveillance

See notifiable diseases automatically flagged from recorded diagnoses, and track each alert through to ministry reporting.

Overview

The Surveillance page (labeled 'Surveillance' in the sidebar, under Public Health & Reporting) implements IDSR (Integrated Disease Surveillance and Response). It is a read-only, continuously live dashboard: it sweeps the diagnoses already recorded on appointments and medical record entries, matches them against a catalogue of notifiable conditions, and flags any case that needs to be reported. Some conditions are 'immediately notifiable', meaning they require urgent reporting to the ministry of health because they are epidemic-prone or targeted for eradication.

- Automatic sweep of recorded diagnoses (from appointments and chart entries), no manual data entry
- Notifiable-disease catalogue with each condition marked Immediate or Routine, and its category
- Filter the sweep by date range and by disease
- Stat cards for total flagged cases, immediately-notifiable cases, and distinct diseases seen
- A persisted alert lifecycle: Detected, Reported, Dismissed, so a facility can track what's already been reported to the ministry
- Breakdown charts: cases by disease and cases by facility / branch

> **Note:** This is a different tool from DHIS2 National Health Reporting. Surveillance is a live, always-on early-warning view of individual notifiable cases with their own reporting status. DHIS2 Reporting is the monthly statutory case-count file your facility submits to the national system. Use Surveillance to catch and report urgent cases as they happen, and DHIS2 Reporting for the periodic official return.

Reviewing Flagged Cases

The Flagged Cases table shows every notifiable diagnosis found in the current filter window:

1. **Set a Date Range (Optional)**
   Use the From and To date fields to narrow the sweep to a specific period.
2. **Filter by Disease (Optional)**
   Choose a specific notifiable condition from the dropdown. Immediately-notifiable diseases are marked in the list.
3. **Review the Table**
   Each row shows the disease, the diagnosis text, the ICD code, whether it came from an Appointment or a Chart Entry, and the date.
4. **Clear Filters**
   Click 'Clear filters' to return to the full unfiltered sweep.

> **Warning:** When the Immediately Notifiable count is above zero, a red banner appears at the top of the page. Cases in that state must be reported to the ministry without delay.

Tracking Alerts Through Reporting

A raw sweep isn't a record of what's been reported. The Tracked Alerts panel persists that history:

1. **Run a Scan**
   Click 'Scan & save alerts' to persist the cases currently in view as tracked alerts, in the Detected state. Cases already tracked are skipped; the scan reports how many were newly created versus already known.
2. **Report an Alert**
   Click 'Report to ministry' on a Detected alert once you've actually submitted it. You can optionally add a note for the audit trail.
3. **Dismiss a Non-Case**
   Click 'Dismiss' if an alert turns out to be a duplicate or a mis-coded diagnosis. It stays on record but drops out of the active list.
4. **Reopen an Alert**
   Click 'Reopen' to return a Reported or Dismissed alert to Detected if it needs a second look.
5. **Filter by Status**
   Use the status dropdown to show only Detected, Reported, or Dismissed alerts.

> **Tip:** Run the scan regularly, for example at the end of each clinical day, so notifiable cases don't sit unreported past the ministry's urgency window.

Breakdown and Reference

Below the alerts, two more views help with reporting and awareness:

- Cases by Disease: a bar chart ranking the diseases seen most often in the current filter window
- Cases by Facility: a table of counts per branch
- Notifiable Disease Catalogue: the full reference list of IDSR priority conditions (Cameroon MINSANTE / WHO-AFRO), each marked Immediate or Routine with its category

40 DHIS2 National Health Reporting

Compile your facility's monthly disease data and export it in the standard format for the national DHIS2 health information system.

What DHIS2 Reporting Is

DHIS2 is the national health information system that ministries of health use to collect, store, and analyse health data from every clinic and hospital in the country. Each facility is expected to report how many cases of certain diseases it treated each month, broken down by age and gender. This module does that compilation for you automatically: instead of manually counting cases from your registers, it reads the diagnoses already recorded in your patients' medical records and builds a ready-to-submit monthly report in the exact format the national system expects.

- Turns the diagnoses in your medical records into an official monthly health report
- Counts cases automatically, with no manual tallying from paper registers
- Breaks down each disease by age group (under 5 / 5 and over) and by gender
- Produces a report file in the standard DHIS2 format ready for submission
- Covers the reporting period (one calendar month) the national system requires

Tip: For live, continuously-updated notifiable-disease alerts and their ministry-reporting status, rather than this monthly file, see the Disease Surveillance page. It flags urgent cases automatically as they are diagnosed.

Note: This feature is for the staff responsible for monthly statutory reporting, typically the health information officer, a doctor, or an administrator. Everyday clinical staff do not need to use it.

Setting Up Disease Mappings

Before you can generate a report, the system needs to know which of your recorded diagnoses correspond to which item in the national DHIS2 system. You do this once by creating a mapping for each disease you report on. A mapping links three things: the disease name, its ICD-10 code (the international medical code your doctors use when diagnosing), and the DHIS2 data element code provided by your ministry of health.

1. **Open the DHIS2 Reporting page**
   Click the DHIS2 reporting option in the sidebar. You will see your list of existing disease mappings and a section for generating reports.
2. **Click 'Add Mapping'**
   Click the 'Add Mapping' button to open the mapping form.
3. **Enter the disease name**
   Type a clear name for the disease, for example 'Malaria' or 'Acute Diarrhoea'.
4. **Enter the ICD-10 code**
   Enter the international diagnosis code your doctors use for this disease, for example 'B54'. This must match the code recorded in your patients' medical records.
5. **Enter the DHIS2 data element code**
   Enter the data element code that your ministry of health assigned to this disease in the national system.
6. **Save the mapping**
   Click save. The disease now appears in your mappings list and will be included in future reports.

Tip: Ask your district or regional health office for the official list of DHIS2 data element codes. Setting up your mappings correctly once means every monthly report afterward is accurate.

Generating a Monthly Report

Once your mappings are in place, you can produce the report for any month. The system looks at every patient diagnosis recorded during that month, matches it to your mappings, and counts the cases, automatically separating each disease into under-5 / 5-and-over and male / female groups.

1. **Choose the month and year**
   In the 'Export Report' section, select the reporting month and enter the year you want to report on.
2. **Click 'Generate Report'**
   Click 'Generate Report'. The system reads the diagnoses recorded that month and builds the case counts.
3. **Review the results**
   The report shows each disease's data element, the age-and-gender group it falls under, and the number of cases counted. Check that the figures look reasonable before submitting.

4. **Download the report file**

Click 'Download JSON' to save the report file to your computer. This file is in the standard DHIS2 format and is ready to be uploaded to the national health information system.

Note: Only diagnoses that have a matching mapping are counted. If a disease is missing from your report, check that a mapping exists for its ICD-10 code and that doctors recorded that code in the patient's medical record.

Submitting to the National System

The downloaded file is what you send to the national DHIS2 platform for your facility's monthly return.

1. **Log in to the national DHIS2 portal**
   Sign in to your ministry of health's DHIS2 website using the facility account your health office provided.
2. **Use the import option**
   Find the data import option in DHIS2 and upload the report file you downloaded. The file already includes the reporting period and your facility identifier.
3. **Confirm and complete**
   Confirm the import in DHIS2 and mark the dataset as complete for the month, following your ministry's usual procedure.

Warning: Always generate and review the report after all of the month's patient visits have been recorded; generating it too early will undercount your cases. Submit by your ministry's monthly reporting deadline.

41 Donor Reports

Roll up service delivery, disease surveillance, and insurance claims into one aggregate report for donor and programme officers.

Overview

The Donor Reports page (labeled 'Donor Reporting' in the sidebar, under Public Health & Reporting) is a read-only aggregate report built for the kind of return a health-donor programme officer expects, whether that's the Global Fund, Gavi, WHO, or the ministry of health (MINSANTE). It rolls three areas of the system together into a single view: service-delivery volumes, disease surveillance, and CSU / insurance claims, so you don't have to compile the numbers by hand from separate pages.

- Service-delivery volume: appointments, consultations, admissions, OPD visits, lab tests, and prescriptions
- Disease surveillance: notifiable-disease alerts, split by immediately-notifiable status
- CSU / insurance claims: submitted vs. approved counts, approval rate, and approved amount
- Group results by month or by branch
- Date-range filtering with a visible 'as of' generation timestamp

Note: The page only drives filters and displays what the server aggregates. Everything shown is scoped to your own tenant and computed live from the same operational data behind Appointments, Surveillance, and Reimbursement.

Filtering the Report

1. **Set a Date Range (Optional)**
   Use the Start Date and End Date fields to limit the reporting period. Leave them blank to include all recorded activity.
2. **Choose Group By**
   Select 'Month' to break the service-delivery table down by calendar month, or 'Branch' to break it down by facility instead.
3. **Clear Filters**
   Click 'Clear filters' to remove the date range and start over.

Tip: Match the date range to your donor's reporting period (quarterly, semi-annual, or annual) before copying the figures into their template.

Reading the Summary

Twelve stat cards summarize the period at a glance:

- Patients Registered, Appointments, Consultations, Admissions (with active admissions shown as a subtitle)
- OPD Visits, Lab Tests, Prescriptions
- Bills Issued, with the total billed amount shown underneath
- Surveillance Alerts, with the immediately-notifiable count shown underneath
- CSU Submitted, CSU Approved, and CSU Amount Approved

Service Delivery and Disease Surveillance Tables

Two tables give the period detail behind the summary cards:

- Service Delivery Volume: one row per month or per branch, depending on the Group By setting, with appointments, consultations, admissions, OPD visits, lab tests, and prescriptions
- Disease Surveillance: one row per notifiable disease, with total alerts and a breakdown of Detected, Reported, and Dismissed, pulled directly from the Surveillance page's tracked alerts

CSU Claims Summary

A dedicated card at the bottom shows the claims side of the report, sourced from the Reimbursement page:

- An approval rate badge (approved claims as a percentage of submitted claims)
- Six figures: Submitted, Approved, Rejected, Paid, Partially Paid, and the total Amount Approved

Note: This block reflects the same CSU claims tracked on the Reimbursement Claims page, so the two pages will always agree for the same date range.

42 Patient Portal

How patients access their health data via mobile.

Patient Access

1. **Download Fiap Mobile**
   Install the app on Android.
2. **Select Patient Portal**
   Choose 'Patient Portal' on login.
3. **Enter MRN + Phone**
   Use Medical Record Number and registered phone number.
4. **View Dashboard**
   See appointments, lab results, billing history, and medical records.