User Manual (English)

The following are the various modules and domains offered by ERP+ from Technocom, covering a wide range of businesses. You can be a small distributor, a manufacturer, running an educational institute, or a healthcare organization. There is something for everyone.

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Domain: Healthcare

Domain: Healthcare

Life is priceless and you, as a healthcare practitioner would need the best tools to honor it. ERP+ Healthcare domain is a humble initiative to help you serve your patients better.

ERP+ Healthcare helps you manage your hospital, clinic or practice efficiently by scheduling Appointments, capturing Vitals and managing medication and investigation orders by recording Patient Encounters. You can easily pull out a Patient's Medical History anytime to review the patient's past conditions and treatments assisting you in providing effective, high quality care. ERP+ Healthcare allows you manage multiple Medical Code Standards like the ICD 10 and easily search for Medical Codes simplifying the coding process. ERP+ Healthcare also comes with a Laboratory module with predefined templates for recording common Lab Tests.

1. Topics

1.1 Basics and Setup

1. Introduction
2. Patient Appointment
3. Setup

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1. Patient
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3. Patient Encounter

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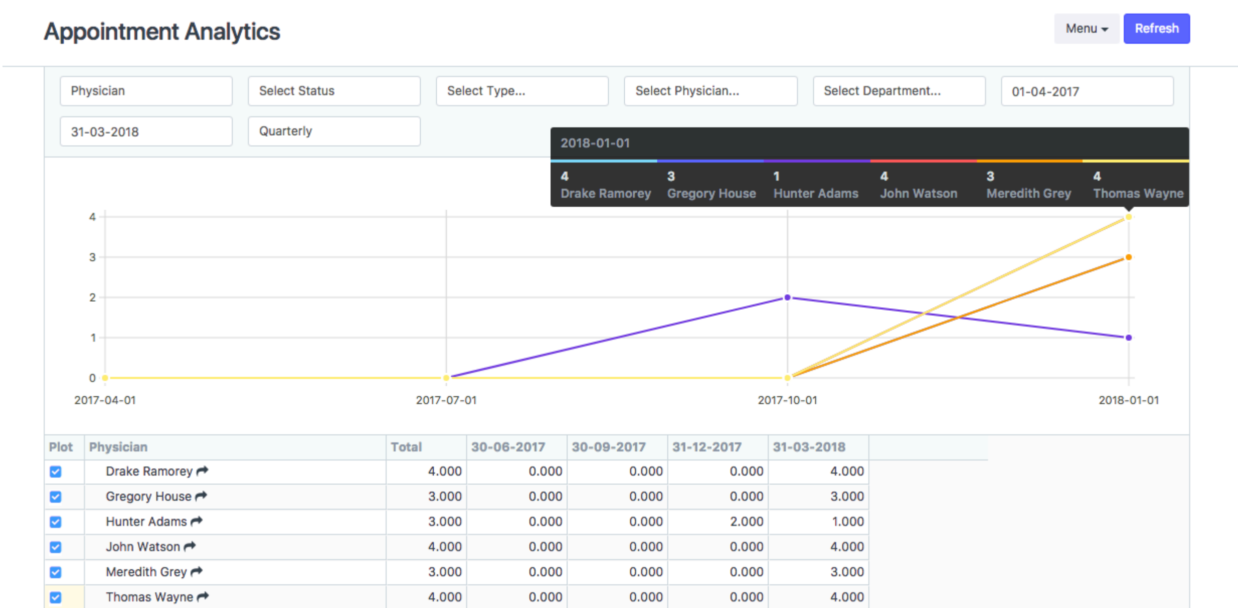
1.1 Topic: Basics and Setup

1. Introduction
2. Patient Appointment
3. Setup

1. Introduction

Here is what a patient appointment looks like in ERP+:

Here are some analytics:



With ERP+, Healthcare domain helps you define templates for Clinical Procedures, schedule appointments for procedures and also record the consumption of Stock while performing a procedure. Inpatient ADT and related Billing features are also made available. More importantly, all of it seamlessly integrated with the bulk of other useful features available in ERP+.

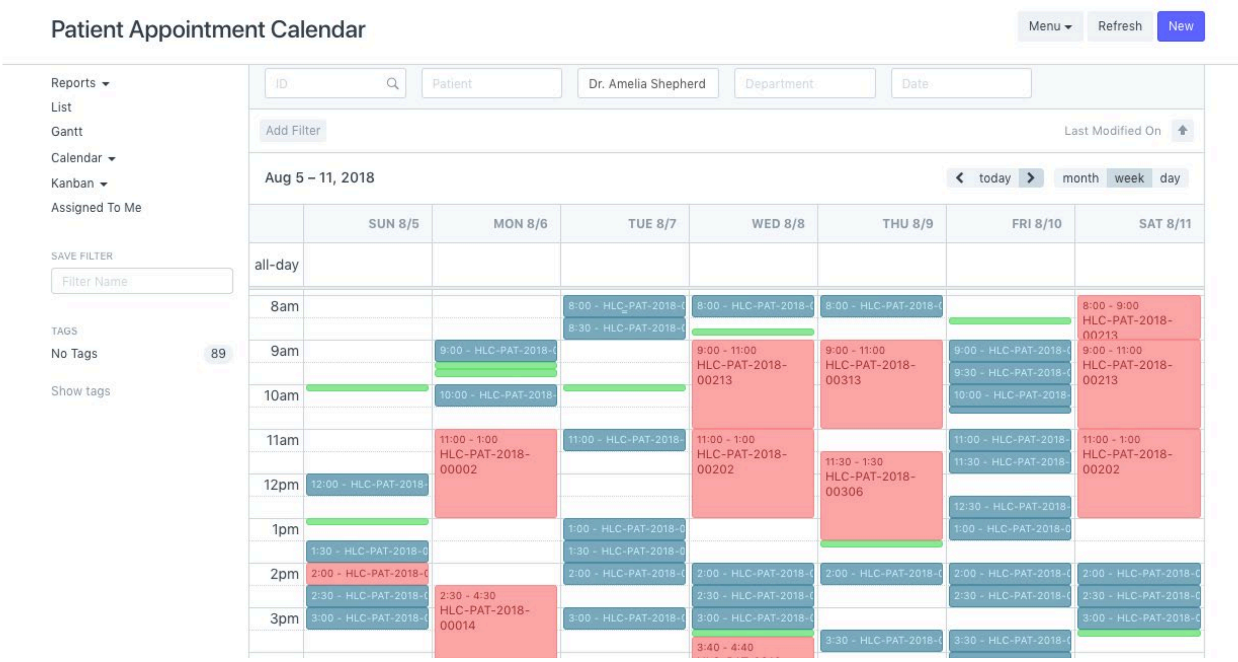
Power your operations with ERP+

Of course, a Healthcare institution needs lots more than just the Healthcare domain to operate efficiently - ERP+ has all of it built-in, out of box!

- You can track your books of accounts using Accounts module.
- Manage your staff's payroll, leaves, recruitment, appraisals, claims and much more with HR module.
- Organize your Purchases and place an approval system.
- Track and manage your Pharmacy Stock and other supplies effectively.
- Manage your Fixed Assets purchases and sales, depreciation and ensure timely maintenance.
- Receive online payments and Integrations with other services including various Google Services.

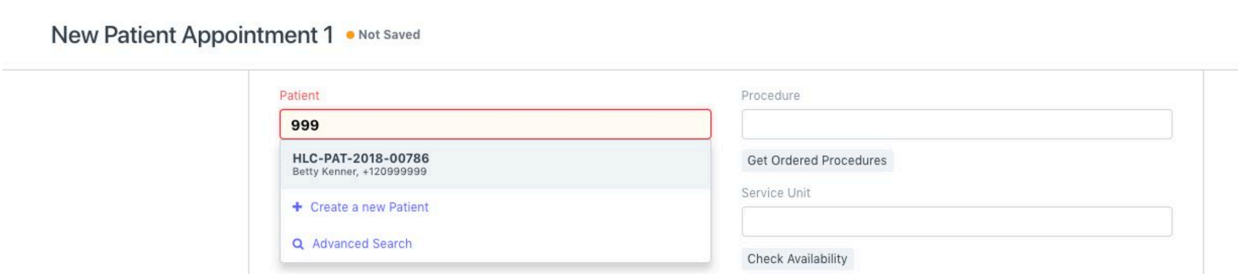
2. Patient Appointment

ERP+ Healthcare allows you to book Patient appointments for any date and alert patients via Email or SMS. You can easily organize appointments for each Practitioner based on their availability schedules.



You can create a Patient Appointment from: Healthcare > Appointment Booking > Patient Appointment

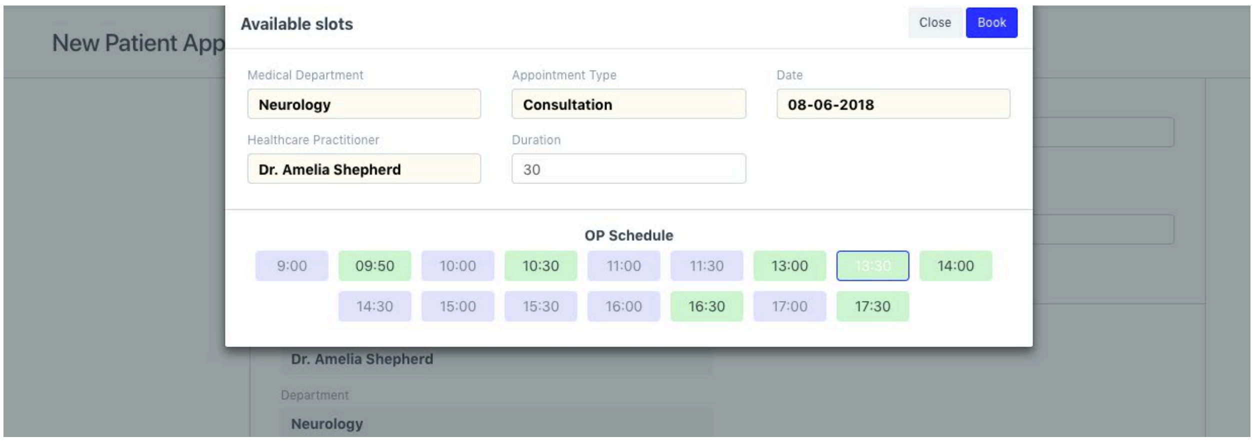
You can book appointments for a registered Patient by searching for Patient by Patient ID, Name, Email or Mobile number. It is also possible to register a new Patient from the Appointment screen itself by selecting Create a new Patient in the Patient field.



If you need to book appointments for procedures select a Procedure or use Get Ordered Procedures to select from a list of Procedures that are ordered for the selected Patient.

Check Availability button will allow you to select the Practitioner, Appointment Type and Date for which the appointment is to be booked. On selecting the details, all the available time slots for the practitioner be displayed with status indicators for the selected date. You can select a time slot and Book an Appointment for the Patient.

Note that, selecting the Appointment Type will automatically set the duration of the appointment as configured in the Appointment Type. This will allow you to override the duration of appointments set by the Practitioner Schedule and the time slots will adjust to the next available time automatically. To disable this behavior, you can enable Always Use Slot Duration as Appointment Duration in the Practitioner master. This will always set the slot duration configured in the Practitioner Schedule as the Appointment duration.



Note: Appointment booking considers any 'approved' Leave Applications for the Practitioner (Employee linked in the master) and does not allow bookings on such days.

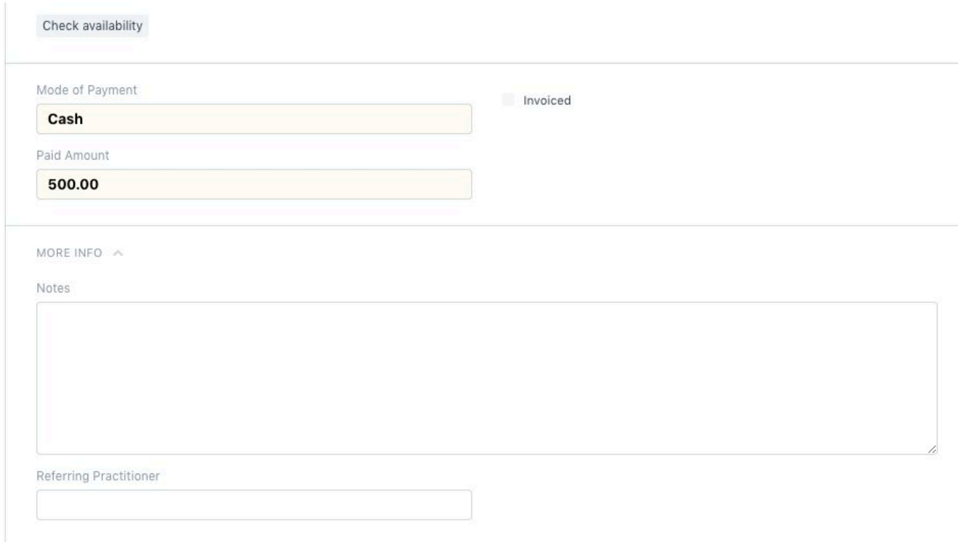
Once booked, the scheduled time of the Appointment and the Service Unit as per the Practitioner and appropriate Status will be set in the document. The More Info section of Patient Appointment, user can add *Notes* and also select a *Referring Practitioner* to help you track referrals.

Optionally, you can configure ERP+ to automatically send an SMS alert to the Patient about the booking confirmation from: Healthcare > Healthcare Settings > Out Patient SMS Alerts

Invoicing

ERP+ Healthcare allows you to automatically create an Invoice as you book an Appointment. To enable this option, you can turn on this option from: Healthcare > Healthcare Settings > Invoice Appointments Automatically

If enabled, the Patient Appointment will prompt you to select the Mode of Payment and enter the Amount collected as the Consultation Charge.



Note: If you have not enabled this, you can always use *Get Items From > Healthcare Services* in Sales Invoice

Actions

- Vital Signs: Create > Vital Signs button will take you to the new Vital Signs screen to record the vitals of the Patient.
- Encounter: From the Appointment screen you can directly create and record the Patient Encounter to record the details of the visit.
- View Patient Medical History.

Note: User should have appropriate privileges (User Role) to view the buttons

Booking appointments via the ERP+ portal by patients directly checking a Practitioner's availability is not currently available.

3. Setup

Setting up the Healthcare domain is fairly easy. Once you setup ERP+ (Company, Chart Of Accounts etc.), you can start with setting up your domain. To setup Healthcare module completely, you should have Healthcare Administrator Role enabled. You can configure each of the departments as detailed in the Topics below.

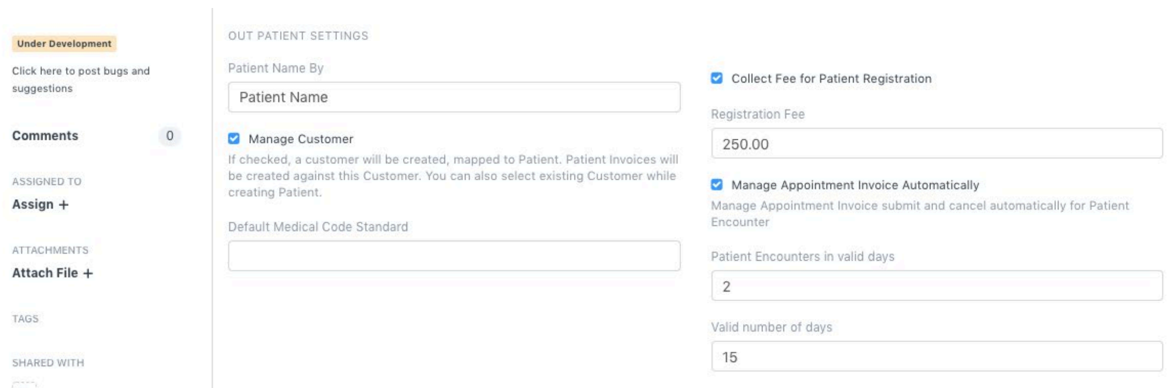
1. Healthcare Settings
2. Setup Practice
3. Setup Inpatient
4. Setup Laboratory
5. Setup Pharmacy

Healthcare Settings

Most of the global settings for the Healthcare module can be done via the Healthcare Settings page. Healthcare > Setup > Healthcare Settings

Note: Ensure that you have Healthcare Administrator role enabled for your User to access this page.

Outpatient Settings



- **Patient Auto Name**: By default, Patient document uses naming series for naming but you can also opt to change this to Patient Name if required.

- **Link Patient with Customer**: The Manage Customer option will enable the system to create and link a Customer whenever a new Patient is created. This Customer is used while booking all transactions. If you do not enable this, you won't be able to ling the Patient with a Customer while invoicing any of the services.

- **Default Medical Code Standard**: ERP+ Healthcare allows you to use multiple Medical Code Standards - here, you can also select the default Medical Code Standard.

- **Collect Fee for Patient Registration**: If you enable this, all new Patients you create will be Disabled by default and will be only be enabled after Invoicing the Registration Fee. To create Invoice and record the payment receipt, you can use the Invoice Patient Registration button in the Patient document. Also note that all ERP+ Healthcare documents, filters out Patient records that are disabled. You can also set the registration fee to be collected here.

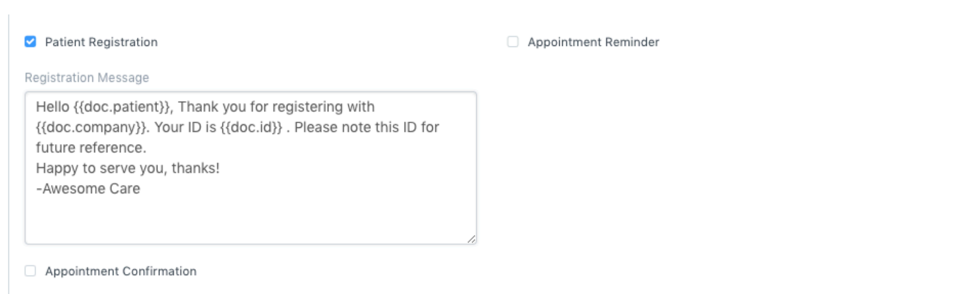
- **Manage Appointment Invoice Automatically**: If you wish to automatically create an Invoice (with the selected Practitioner's consultation charges), you can enable this option. This feature is particularly helpful if your facility collects payment while booking an appointment. The Patient Appointment form will allow you to select the Payment Method and amount received.

- **Validity for Follow-ups**: Many healthcare facilities do not charge for follow up consultations within a time period after the first visit. You can configure the number of free follow ups (Patient Encounters in valid days) allowed as well as the time period (Valid number of days) for free consultations here.

Healthcare Service Items

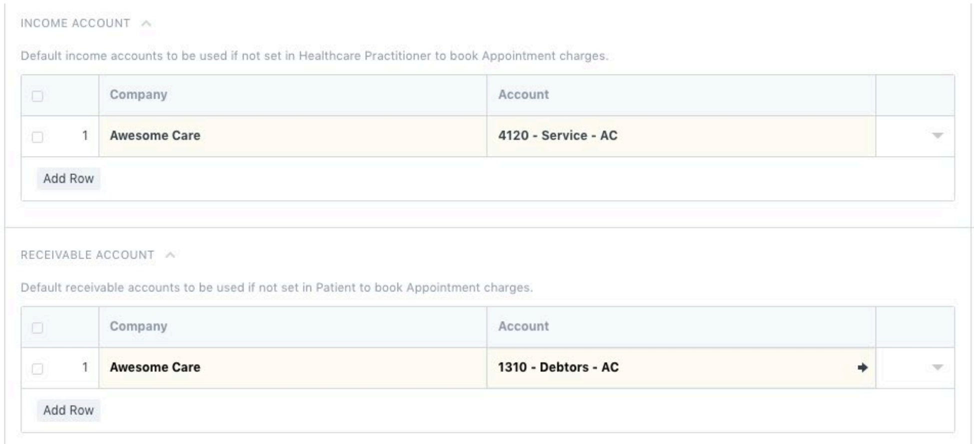
ERP+ Healthcare utilizes the Accounts module for billing Patients. You can configure default Items for billing consultation charges, procedure consumption items etc. here.

SMS Alerts



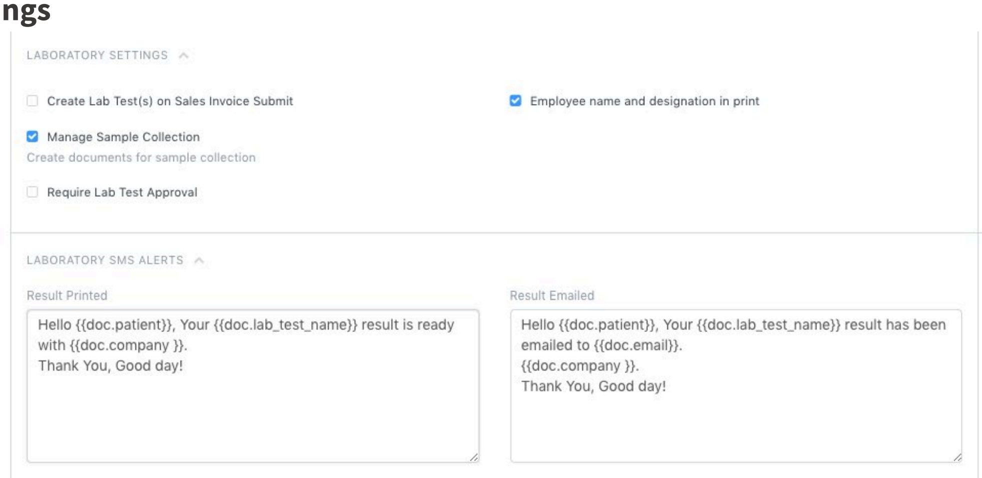
You can enable sending SMS alerts on Patient appointment Booking etc. and also configure SMS text in this section.

Income Account and Receivable Account



If you wish to override default accounts settings and set custom Income and receivable accounts, you can do so here.

Laboratory Settings



- **Create Lab Test(s) on Sales Invoice Submit**: If your facility creates Invoices and collect payments from Patients before performing the Lab Test, you can enable this option to create Lab tests automatically for all the Tests that are billed. If you have enabled Manage Sample Collection and has a Sample configured in the Lab Test Template, a Sample Collection document will also be created.

- **Manage Sample Collection**: If this flag is enabled, every time you create a Lab Test, a Sample Collection document will be created.

- **Require Lab Test Approval**: Turning this on will restrict printing and emailing of Lab Tests only if the documents are in Approved status. You can use this flag to ensure that every Test result leaves your facility after verification.

- **Employee name and designation in print**: Enable the third option if you want the name and designation of the Employee associated with the User who submits the document to be printed in the Lab Test Report.

- **Laboratory SMS Alerts**: You can configure ERP+ Healthcare to alert Patients via SMS when the Lab Test result gets ready (Submit) and when you Email the result. You can configure the templates for the SMS as registered with your provider here.

Setting Up Clinic / Practice

You can easily configure the masters for setting up ERP+ Healthcare for your practice. Below is a list of documents which helps you speed up data entry.

Medical Department

To organize your clinic into departments, you can create multiple Medical Departments. Healthcare > Setup > Medical Department > New Medical Department

Appointment Type

You can create masters for various type of Appointments. Appointment Type allows you to predefine the duration of the appointment so that while selecting Appointment Type, the duration gets set in the Appointment automatically. This will allow you to override the duration of appointments set by the Practitioner Schedule and the time slots will adjust to the next available time automatically.

Note: To disable this behavior, you can enable Always Use Slot Duration as Appointment Duration in the Practitioner master. This is will always set the slot duration configured in the Practitioner Schedule as the Appointment duration.

You can also set a color for each Appointment Type which will help you identify the appointments of a particular type in the Calendar view. Healthcare > Setup > Appointment Type > New Appointment Type

Healthcare Service Unit Type

While setting up the schedule for Healthcare Practitioner, you can optionally select a Healthcare Service Unit at which the Practitioner will be conducting his consultations. You should have Allow Appointments option checked for Healthcare Service Unit for booking appointments. You can also define the properties of service units in Healthcare Service Unit Type, also read about Setting up Inpatient Facility for more details.

Masters to Ease Data Input

ERP+ Healthcare allows you to configure some of the frequently used masters to make the data entry easier.

Dosage Forms

Dosage Forms help you configure the form in which the medications are packaged, for example Capsules, Syrups etc. Healthcare > Setup > Complaints > New Dosage Form

Route of Administration

The Route of Administration corresponds to the path by which the medication is induced into to Patient. For example, Oral, Intravenous etc. Healthcare > Setup > Complaints > New Route of Administration

Prescription Dosage & Duration

You can configure different dosages to be used while prescribing medication to patients. You can name the Prescription dosage in any way you want (for example, BID or I-0-I), and then set the strength of the drug and the times at which it should be administered.

Healthcare > Setup > Prescription Dosage > New Prescription Dosage

Healthcare > Setup > Prescription Duration > New Prescription Duration

Complaint and Diagnosis

To ease the data entry while recording the encounter impression, ERP+ Healthcare allows you to save every Complaint / Diagnosis data you enter, from the Patient Encounter screen itself. This way, the database keeps building a list of all complaints and diagnosis you entered. Later on, every time you start keying in, you will be able to select the previously entered word / sentence from the search field. You can also configure the masters manually by going to,

Healthcare > Setup > Complaints > New Complaint

Healthcare > Setup > Diagnosis > New Diagnosis

Clinical Procedures Templates

ERP+ Healthcare allows you to configure templates with the various properties of Clinical Procedures to ease the Procedure creation process. You can create new Clinical Procedure Templates by going to: Healthcare > Setup > Clinical Procedure Template

Templates allow you to manage the billable Item, rate etc. for a particular procedure. The Consumables section lets you set the consumable stock Items, default quantities etc. so that these items will be preloaded in the Clinical Procedures created based on the template.

This allows the performing practitioner can easily input the consumed quantities or add additional items which in reality has been consumed as part of the procedure.

If the Invoice Consumables Separately option is turned on, the charges for the consumable Items will be added to the Sales Invoice separately in addition to the Billing Rate of the procedure.

Note that you can also enable Sample Collection for a Clinical Procedure if applicable. Also, possible is to add multiple stages to the Template so that the Clinical Procedure can be tracked by the various stages as configured in the template.

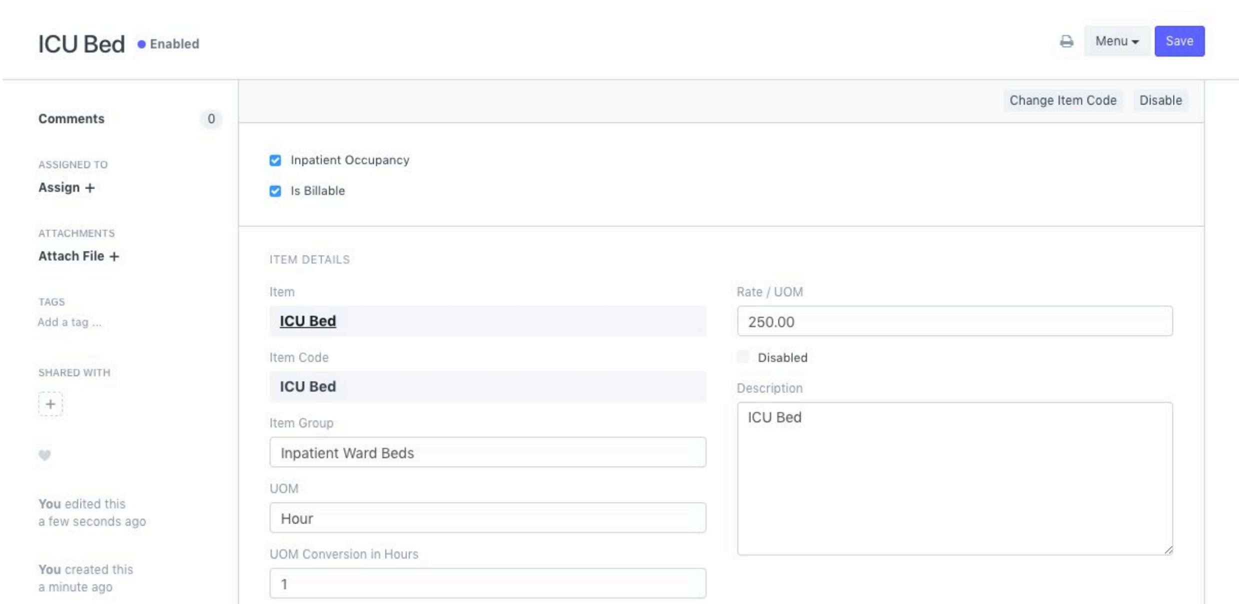
Setting Up Inpatient Facility

ERP+ Healthcare allows you to easily configure your Inpatient facility, Admit, Discharge and Transfer (ADT) patients and Invoice the Patient for the care services rendered. Here's how you can setup this.

You can map your facility infrastructure (wards, beds etc.) in ERP+ using the Healthcare Service Unit document.

Healthcare Service Unit Type
You can define the standard properties of Healthcare Service Units you create using the Healthcare Service Unit Type. By configuring various types of the service unit in your facility with respective rates and other properties, you can easily create multiple Healthcare Service Units by merely selecting the type. You can configure various types by going to,

Healthcare > Setup > Healthcare Service Unit Type > New Healthcare Service Unit Type



ERP+ automatically creates an Item with the details you provide here, for the billing to function.

You can also create Healthcare Service Units to map consulting rooms and other areas where appointment scheduling is possible by checking the Allow Appointments option. Such service units are not linked to Item master as billing will make use of the Item selected in the Healthcare Practitioner master or the ones configured in Healthcare Settings

Note that turning on the Allow Overlap will allow overlapping appointments for the Healthcare Practitioner available at service unit. This will be handy when you create service units where multiple Patients can be treated at the same time, for instance a yoga center or a physiotherapy room.

Setting Up Laboratory

If you wish to use features of Laboratory, you can create Users with *Laboratory User*. Lab Tests, Sample Collection etc. are only visible to users with this Role enabled.

Read Healthcare Settings for setting up the Healthcare module.

Lab Test Templates

Whenever you create a new Lab Test, the Lab Test document is loaded based on the template configured for that particular test. This means, you will have to have separate templates configured for each Lab Test.

Here's how you can configure various types of templates.

Healthcare > Setup > Lab Test Template > New Lab Test Template

After providing the Name for the Test you will have to select a Code and Item group for creating the mapped Item. ERP+ Healthcare maps every Lab Test (every other billable healthcare service) to an Item with "Maintain Stock" set to false. This way, the Accounts Module will invoice the Item and you can see the Sales related reports of Selling Module. You can also set selling rate of the Lab Test here - this will update the Selling Price List.

The Standard Selling Rate field behaves similar to the Item Standard Selling Rate, updating this will not update the Selling Price List

The Is Billable flag in Lab Test Template creates the Item, but as Disabled. Likewise, unchecking this flag will Enable the Item.

Result Format
Following are the result formats available in ERP+ Healthcare

- Single: select this format for results which require only a single input, result UOM and normal value
- Compound: allows you to configure results which require multiple input fields with corresponding event names, result UOMs and normal values
- Descriptive: this format is helpful for results which have multiple result components and corresponding result entry fields.
- Grouped: You can group test templates which are already configured and combine as a single test. For such templates select Grouped.
- No Result: Select this if you do not need to enter or manage test result. Also, no Lab Test document will be created. e.g., Sub Tests for Grouped results.

Normal values
For Single and Compound result formats, you can set the normal values.

Sample
You will have to select the Sample required for the test. You can also mention the quantity of sample that needs to be collected. These details will be used when creating the Sample Collection document for the Lab Test.

Medical Department
To organize your clinic into departments, you can create multiple Medical Departments. You can select appropriate departments in Lab Test Template and will be included in the Lab Test result print.

Healthcare > Setup > Medical Department > New Medical Department

Lab Test Sample
You can create various masters for Samples that are to be collected for a Lab Test.

Healthcare > Setup > Lab Test Sample > New Lab Test Sample

Lab Test UOM
You can create various masters for Unit of Measures to be used in Lab Test document.

Healthcare > Setup > Lab Test UOM > New Lab Test UOM

Antibiotic
You can create masters for a list of Antibiotics.

Healthcare > Setup > Antibiotic > New Antibiotic

Sensitivity

You can create masters for a list of Sensitivity to various Antibiotics.

Healthcare > Setup > Sensitivity > New Sensitivity

Setting Up Pharmacy

ERP+ Healthcare do not have a Pharmacy module as such. However, ERP+ Stock, Buying, and Accounts Module will do all that's needed to seamlessly manage your Pharmacy Stock as well as other supplies, their billing and purchases.

You can also consider creating multiple POS Profiles for each Pharmacy user. ERP+ Stock module features like Items with Reorder Levels and Auto Reordering, Batch Number and Expiry Dates etc. will be worth looking at.

ERP+ Healthcare adds a few custom fields to Item document so that you can effectively configure medicines. Also read Healthcare Settings for setting up default Items, Accounts etc.

Note that these fields are made available only if your setup has Healthcare domain enabled.

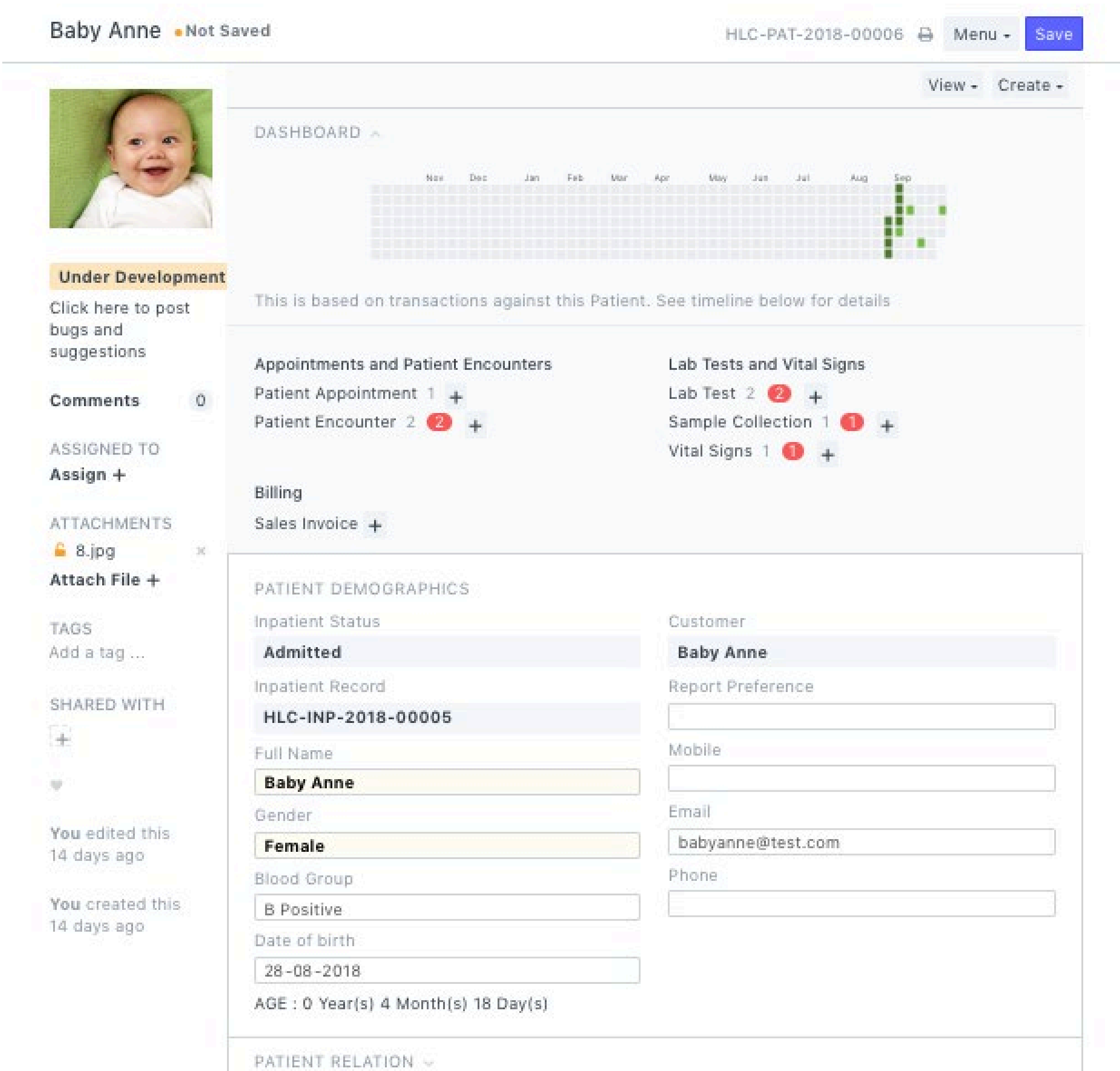
Furthermore, all the three modules come with exhaustive reporting and you can also configure auto email to have reports emailed automatically to you.

1.2 Topic: Patient

1. Patient
2. Vital Signs
3. Patient Encounter

1. Patient

In ERP+ Healthcare, the Patient document corresponds any individual who is the recipient of healthcare services you provide. For every document ERP+ Healthcare, it is important to have a Patient associated with it. You can create a new Patient from: Healthcare > Masters > Patient > New Patient



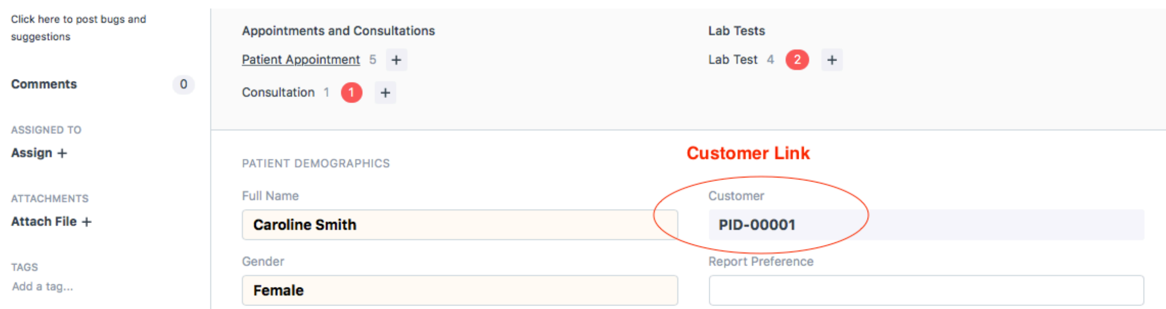
The Patient document holds most details that are required to identify and qualify a patient. You can enter as much information available while creating the Patient. All information in the patient document is presented on the Consultation screen for easy lookup and you can always update this information. Other data like observations, vital signs etc. are all linked to the Patient document. These could be recorded during patient encounters and will be available as part of the Patient Medical History.

The Patient document holds the Patient barcode and can be used in any the default print formats or any Custom Print Formats that you create for printing patient identification tags.

Patient as a Customer

ERP+, especially the Accounts module, makes use of Customer document for booking all transactions. So, you may want to associate every Patient to be associated with a Customer in ERP+. By default, ERP+ Healthcare creates a Customer alongside a Patient and links to it - every transaction against a Patient is booked against the associated Customer. If, for some reason you do not intend to use the ERP+ Accounts module you can turn this behavior off by unchecking this flag: Healthcare > Setup > Healthcare Settings > Manage Customer

In many cases, you may want to associate multiple Patients to a single Customer against whom you want to book the transactions. For instance, a Veterinarian would require the care services provided to different pets of an individual invoiced against a single Customer.



Registration Fee

Many clinical facilities collect a registration fee during Registration. You can turn this feature on and set the registration fee amount by checking this flag: Healthcare > Setup > Healthcare Settings > Collect Fee for Patient Registration

If you have this option enabled, all new Patients you create will be in *Disabled* mode by default and will only be enabled after Invoicing the Registration Fee. To create Invoice and record the payment receipt, you can use the Invoice Patient Registration button in the Patient document.

Note: "Disabled" Patients are filtered out in all ERP+ Healthcare documents.

Grant access to Patient Portal

ERP+ Healthcare allows you to create a portal user associated with a Patient by simply entering the user email id. A welcome email will be sent to the Patient email address to "Complete" registration.

Actions

You can use the document links in the dashboard to traverse the linked document list with Patient filter applied, or use the + icons to create new records. Apart from this, the Patient document allows you to:

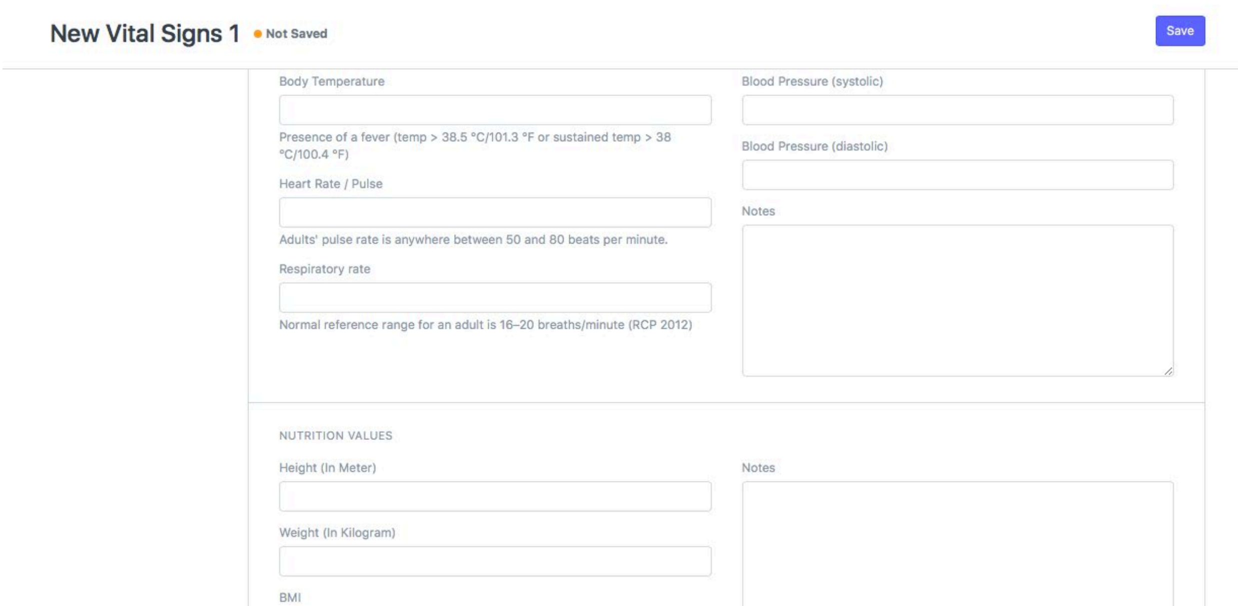
- Jump to the Patient's Health History, using View > Medical Record button.
- Create > Vital Signs to record the vitals of the Patient.
- Manually add data to a Patient's Medical Record, for instance a scanned copy of a Lab Test performed in an external Laboratory or a quick note on the Patient's condition, using Create > Medical Record button.
- Record the details of an encounter by using Create > Patient Encounter button

Note: User should have appropriate privileges (User Role) to view the buttons

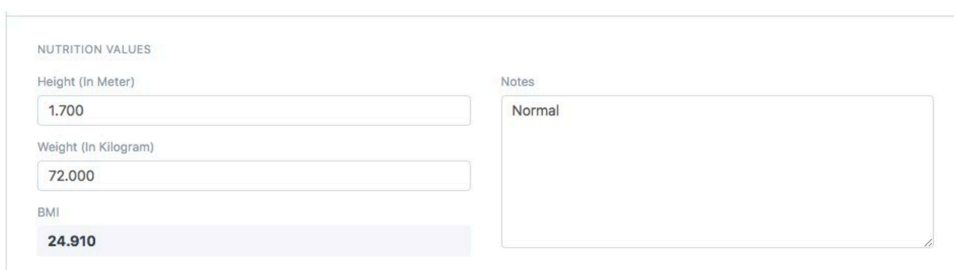
2. Vital Signs

ERP+ Healthcare helps you to capture Vital Signs of Patients at any point of time. All Vitals information over time can be viewed as part of the Patient's Medical History. You can create a new document and record Vital Signs of a Patient directly by: Healthcare > Patient Care > Vital Signs

You can also create and record vitals for a patient from Patient Appointment, the Patient Encounter or the Patient master documents by using the Create > Vital Signs button



You can select the Patient for whom you are recording the vitals and start by entering each of the fields. Normal values or ranges are provided for ease of assessment. An automated BMI calculator is also made available.



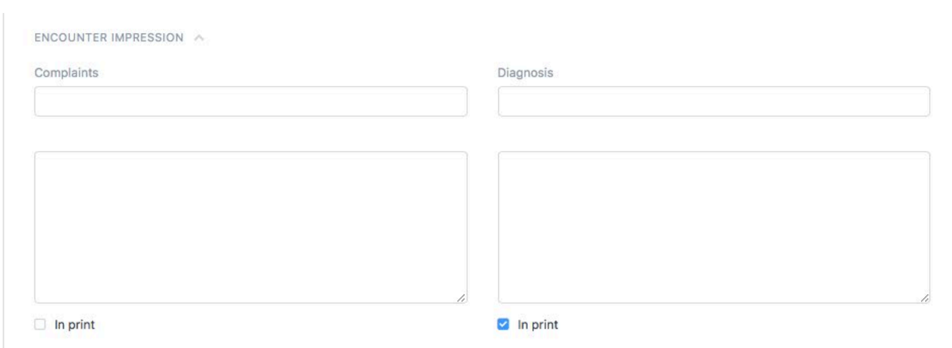
3. Patient Encounter

ERP+ Healthcare allows you to record every encounter with patients through the Patient Encounter document. You can create a Patient Encounter based on a previously booked Appointment or directly by creating a new Patient Encounter: Healthcare > Patient Care > Patient Encounter

You can also create and record encounter details for a patient from Patient Appointment, the Patient Encounter or the Patient master documents by using the Create > Patient Encounter button. If creating a Patient Encounter manually, you can search for a Patient by name, email phone number etc. In the Patient Encounter document, all Patient related details will automatically be populated enabling easy access to relevant data. The Patient Details section will list the latest Vital Signs record of the patient and other information captured in the Patient screen. You can also look up the Patient Health History by using the View > Medical Record button.

Assessment

Encounter Impression section allows you to select (or create new) Complaints and your Diagnosis based on the presented complaints. You can opt to include the captured data in Patient Encounter print by selecting the "In Print" flag



Order Entry

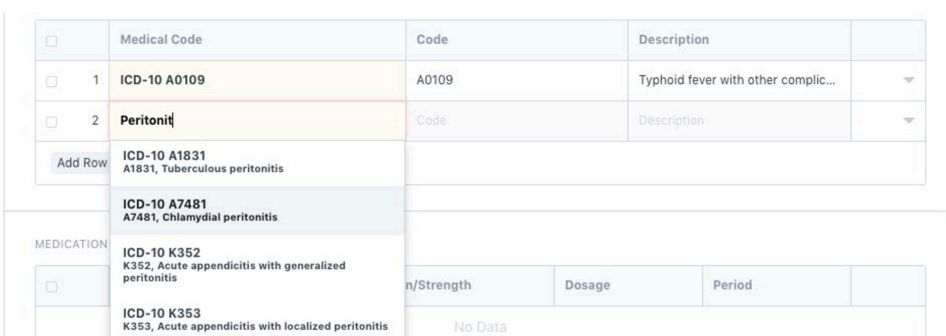
You can prescribe medicines in the Drug Prescription section by selecting the drug codes (Stock Item) and appropriate dosages. If you are not managing Stock and Items are not configured, you can simply enter the Medicine name and strength in the Strength field which will printed.

Ordering a laboratory investigation is similar and if you have Lab Tests configured, you can select from the list. Or key in the Lab Test name to be printed as part of the Prescription. You can also order a Clinical Procedure to performed in a similar fashion.

The Pharmacy (Sales / Accounts) User can fetch medication and investigation orders from Patient Encounter using the Get items from > Prescription made available in the sales Invoice. Lab Tests can be configured to be created automatically on Sales Invoice submission in Healthcare Settings. Procedure Orders can be fetched using the Get Prescribed Procedures while booking the Appointment for the procedure. These will then be available for billing via the Get items from > Healthcare Services.

Medical Coding

You can also attach one or more Medical Codes to designate the Diagnosis in the Medical Coding Section. You will have to select the Medical Code Standard you wish to encode the diagnosis and then select the Code by searching the Code itself or the Code Description.



1.3 Topic: Records and Reports

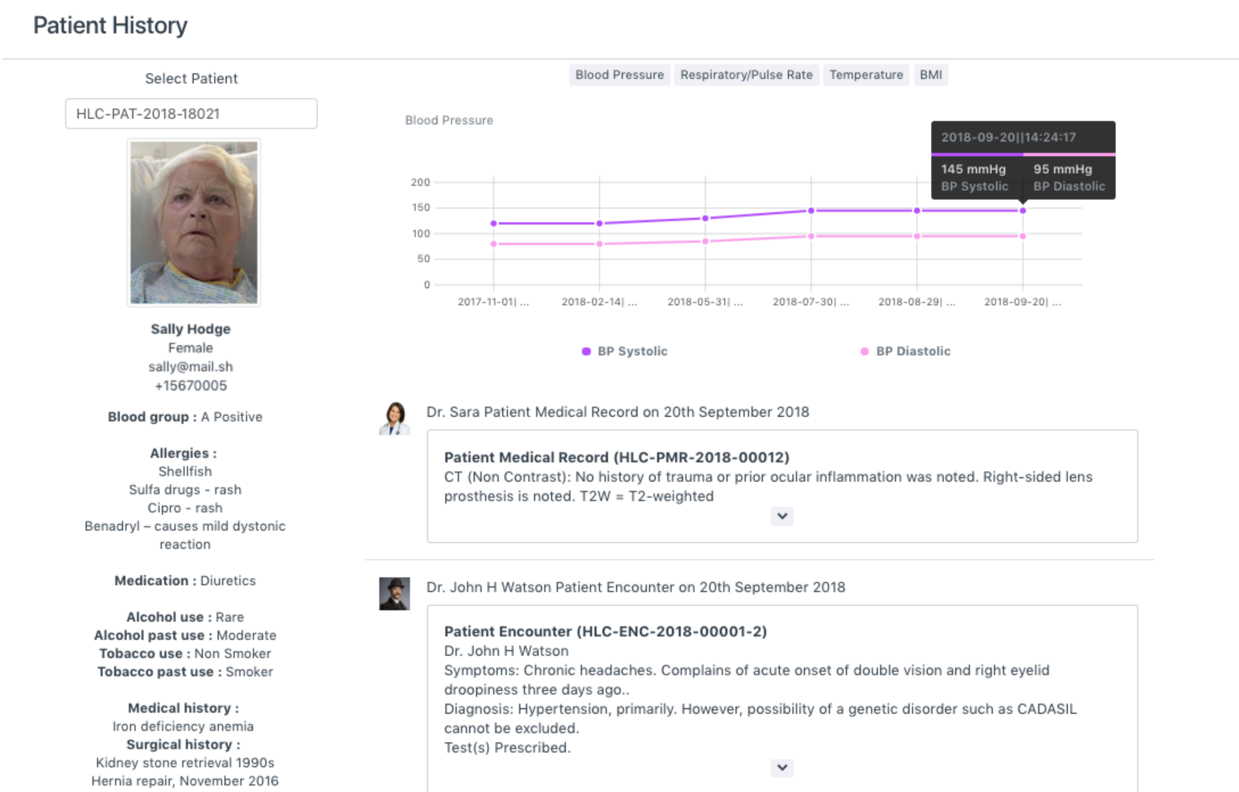
1. Medical Record
2. Inpatient Record
3. Lab Test
4. Sample Collection
5. Inpatient ADT
6. Invoicing

1. Patient Medical History

Maintenance of accurate and complete medical records of patients is one of the rudiments for healthcare practitioners and providers. Over and above, the ease at which the information is accessible by a practitioner is critical in rendering effective, high quality care.

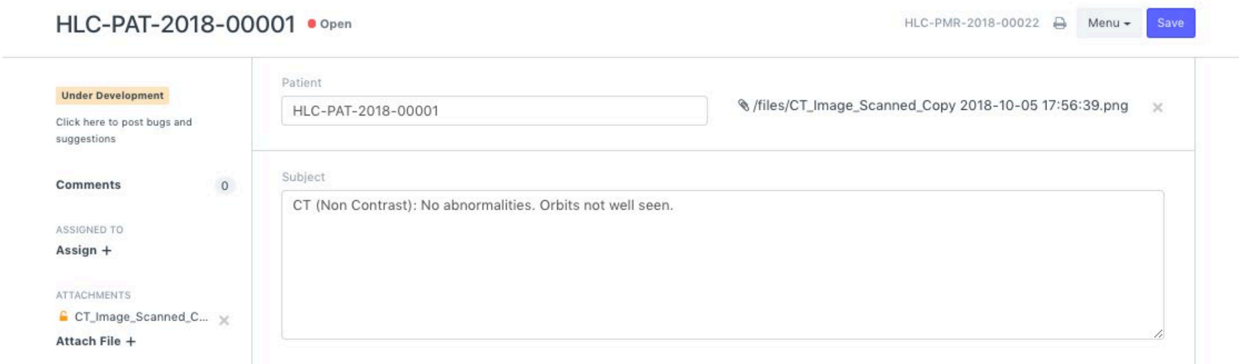
ERP+ Healthcare helps you to draw up the medical history of a Patient anytime by quickly searching and selecting the Patient. View > Medical Record button is available in all forms where Healthcare Practitioners act, so that they can easily switch to the Patient Medical History page to view the patient history.

Medical Record automatically keeps track of all Complaints, Diagnosis and other information captured as part of a Patient Encounter, Vital Signs, Lab Investigations, ordered Clinical Procedures, Admissions etc.



Adding Medical Records Manually

In the Patient document Create > Medical Record will allow you to record notes to the Medical Record manually. You can also attach files when doing this, and the Medical Record will display links to the attached file alongside the notes. It's also possible to add Medical Records from the Patient Encounter.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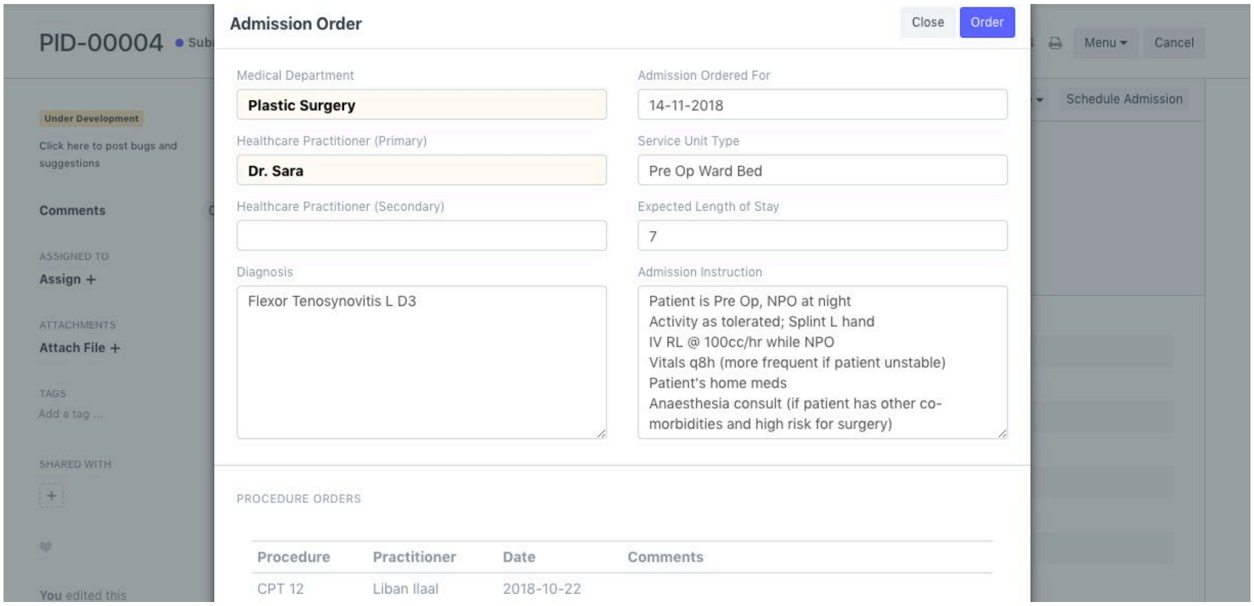
Open
HLC-PMR-2018-00022
Menu
Save
Under Development
Click here to post bugs and suggestions
Comments
0
ASSIGNED TO
Assign +
ATTACHMENTS
CT_Image_Scanned_C...
Attach File +
Patient
HLC-PAT-2018-00001
/files/CT_Image_Scanned_Copy 2018-10-05 17:56:39.png
Subject
CT (Non Contrast): No abnormalities. Orbits not well seen.

2. Inpatient Record

ERP+ Healthcare captures the all details about a Patient Admission using this document.

Inpatient Record is automatically created when a practitioner orders an admission, you can find the document by going to: Healthcare > Patient Care > Inpatient Record



Healthcare Practitioner can order a patient admission from the Patient Encounter document using the Schedule Admission button. This will automatically create an Inpatient Record for the Patient in Admission Scheduled status. The IP admission officer can then allot a vacant room to the Patient as recommended by the referring practitioner in the admission order.

All details as provided by the Practitioner in the admission order will be made available in the Inpatient record, and the dashboard will link to all other documents which are created in the admission period, you also allowed to create new documents from the dashboard.

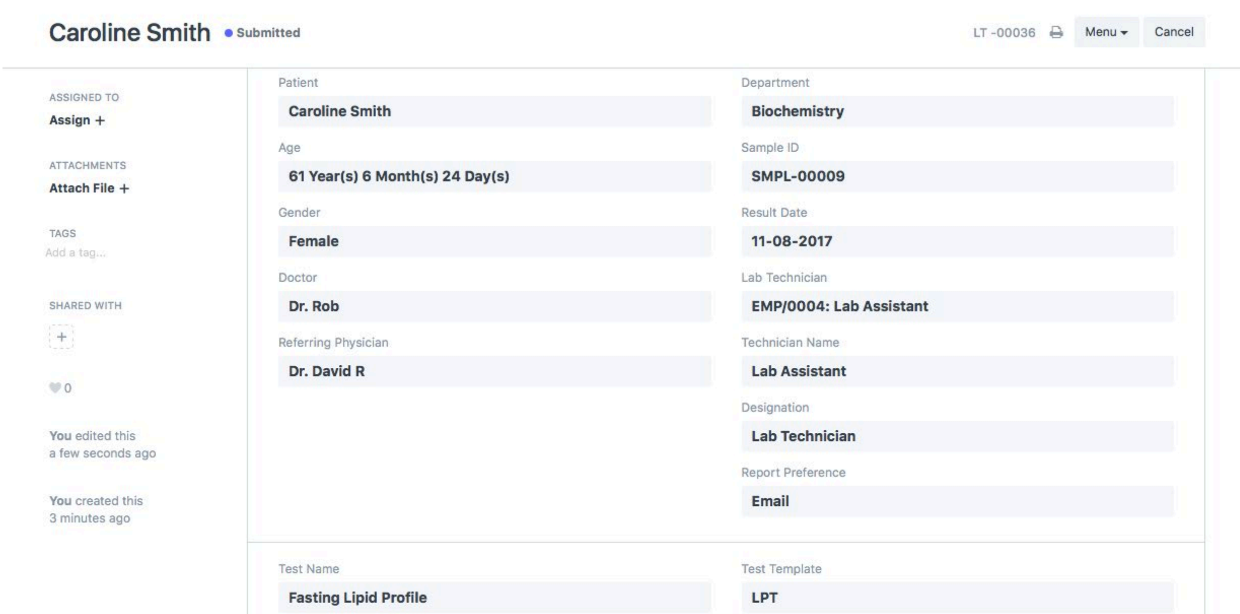
Note: Field Level permissions are by default applied so that Diagnosis information, Admission Instructions and other details are only visible to users with roles Physician and Nursing User enabled

Patient ADT is also managed within the Inpatient Record as described in the Inpatient ADT section.

3. Lab Test

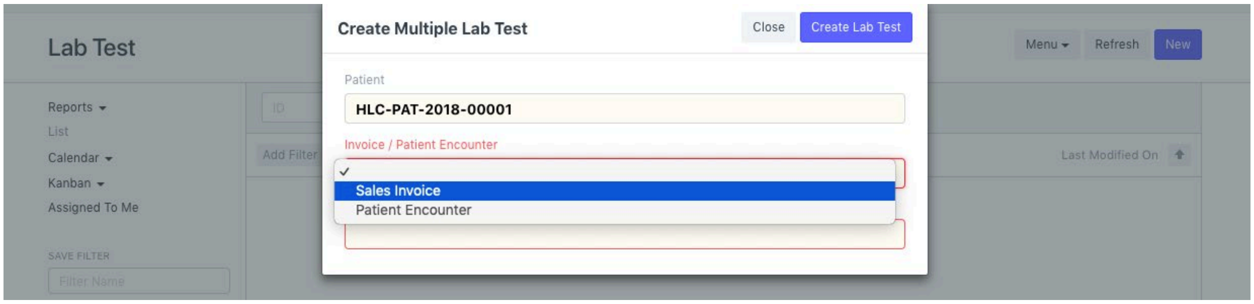
ERP+ Healthcare allows you to manage a clinical laboratory efficiently by allowing you to enter Lab Tests and print or email test results, manage samples collected, create Invoice etc. ERP+ Healthcare comes pre-packed with some frequently ordered tests, you can reconfigure Lab Test Templates for each Test and its result format or create new ones as explained in Setting Up Laboratory

Once you have all necessary Lab Test Templates configured, you can start creating Lab Tests by selecting a Test Template every time you create a Test. To create a new Lab Test: Healthcare > Laboratory > Lab Test > New Lab Test



It is also possible to use the Create Multiple option to create all the lab tests ordered / billed for a patient.

You can select the Patient and then the Encounter or Invoice from which you need to pull the tests without having to open the Encounter / Sales Invoice to look up the orders.

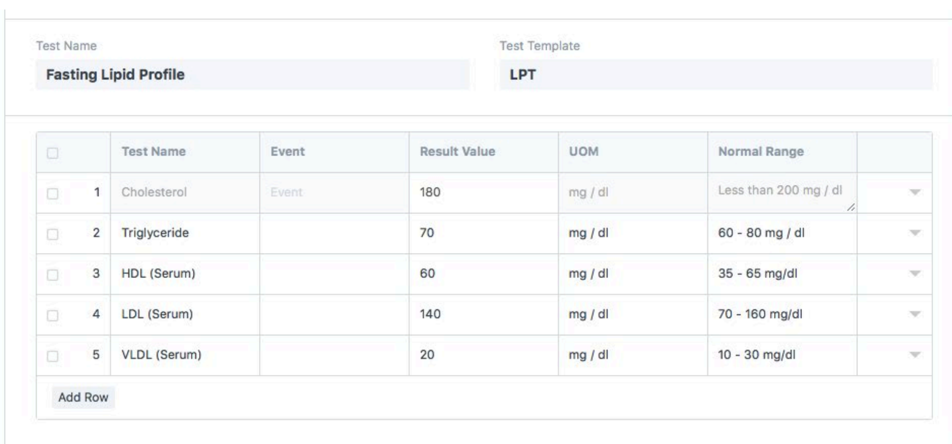


If the Lab Test Template has sample collection enabled, creating Lab Test will automatically create Sample Collection records.

Note: To create Sample Collection documents for every Lab Test, turn on "Manage Sample Collection" flag in Healthcare Settings *and* select Sample in the Lab Test Template

ERP+ Healthcare also allows creation of Lab Tests automatically when any lab tests are billed (via Sales Invoice). This along with other Laboratory configurations can be setup in Healthcare Settings

As the results gets ready, you can enter the details of results in the Lab Test document. All presets, Normal Values etc. as configured in the Lab Test Template are made available Lab Test for easy data capture.



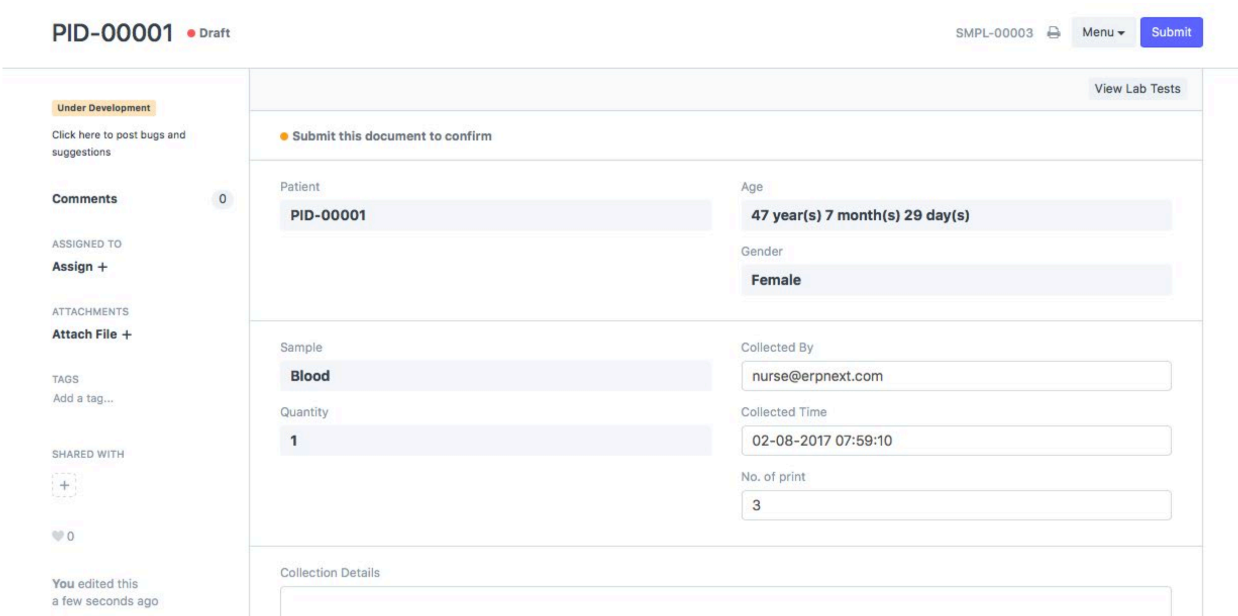
In many Laboratories, approval of Lab Tests is a must before printing and submitting the document. ERP+ Healthcare allows you to create Users with Role "Lab Test Approver" for this. You will also have to enable this in: Healthcare Settings > Laboratory Settings > Require Lab Test Approval

This will ensure that emailing or printing of Lab Tests can only be done after Approval of the Lab Test by the Lab Test Approver.

4. Sample Collection

It's critical for a Laboratory to manage collected samples and you may want to ID the sample, print stickers etc. You can create a Sample Collection directly from: Healthcare Settings > Laboratory > Sample Collection

You can optionally automate the creation of Sample Collection document for each Lab Test by turning on this flag: Healthcare Settings > Laboratory Settings > Manage Sample Collection.



Note: You will have to select a Sample in the Lab Test Template for the system to automatically create a Sample Collection document

You will have to enter the sample collected date and time to Submit the document signaling that the sample is collected.

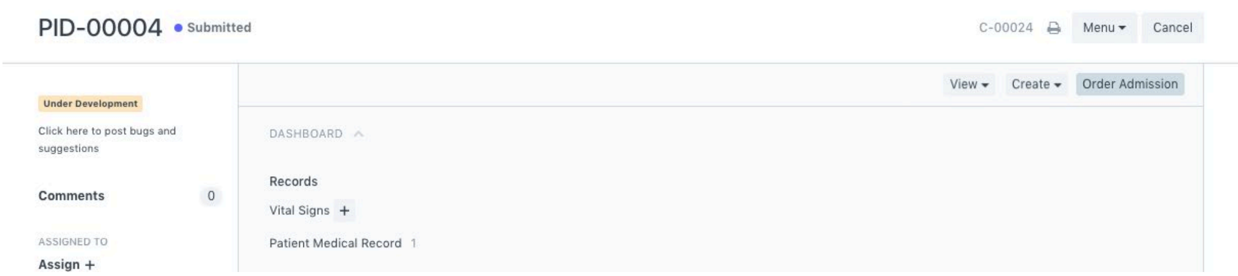
Printing of sample identification tags is also possible. By default, a sample sticker print template is made available, but you can always customize this directly using the Print Format Builder or even create a custom Print Format if required.

5. Inpatient ADT

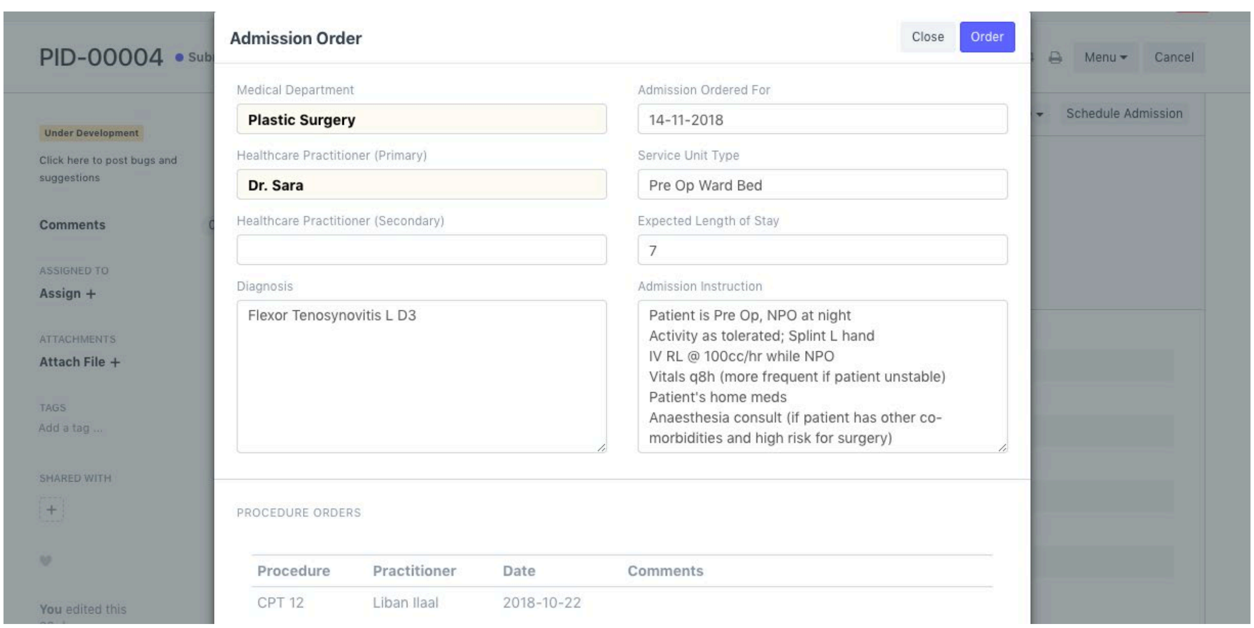
Managing ADT (Admission, Discharge, Transfer) in a busy Hospital is quite a tricky function and ERP+ Healthcare eases this to a great extent. In ERP+ Healthcare every patient admission is managed using the Inpatient Record document.

Admission

A Practitioner can order a patient for admission from the Patient Encounter screen using the Order Admission.



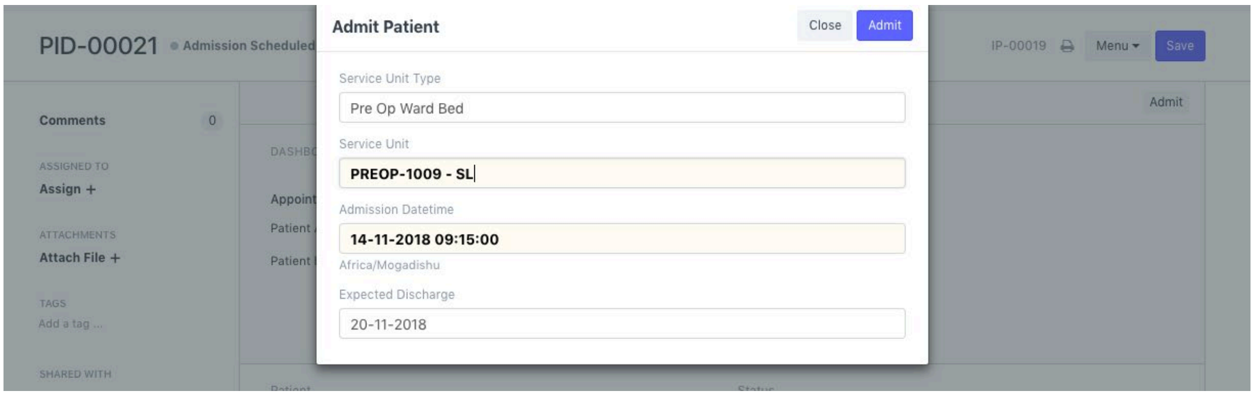
As part of the Admission Order, the practitioner can provide necessary details as to which type of ward bed the Patient needs to be admitted to, and any other admission instructions for the staff.



On ordering a patient for admission, ERP+ Healthcare creates an Inpatient Record for the Patient with all instructions provided by the Practitioner. Any prescribed medications and investigations or procedure orders as part of the ordered Encounter will be carried to the IP record.

Note: Field Level permissions are by default applied so that Diagnosis information, Admission Instructions and other details are only visible to users with roles Physician and Nursing User enabled

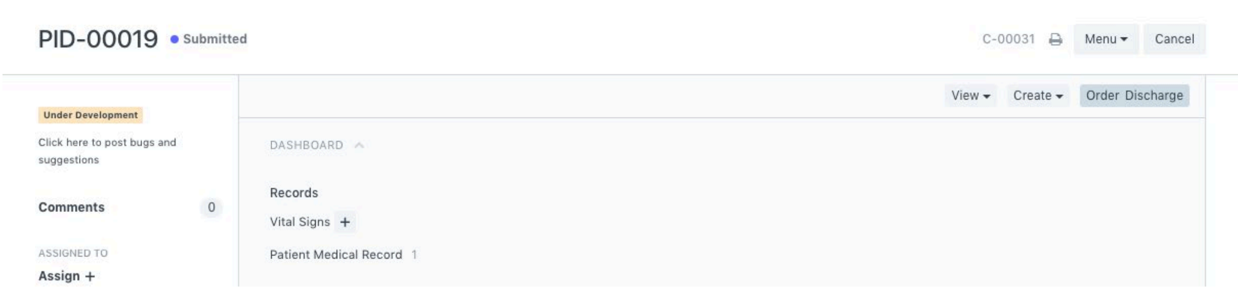
Inpatient admission officer can see the Inpatient Record with status Admission Scheduled and allot the Patient the Ward as per the availability. The Admit button in the Inpatient Record will allow the admission officer to select a ward bed for the Patient and process the admission.



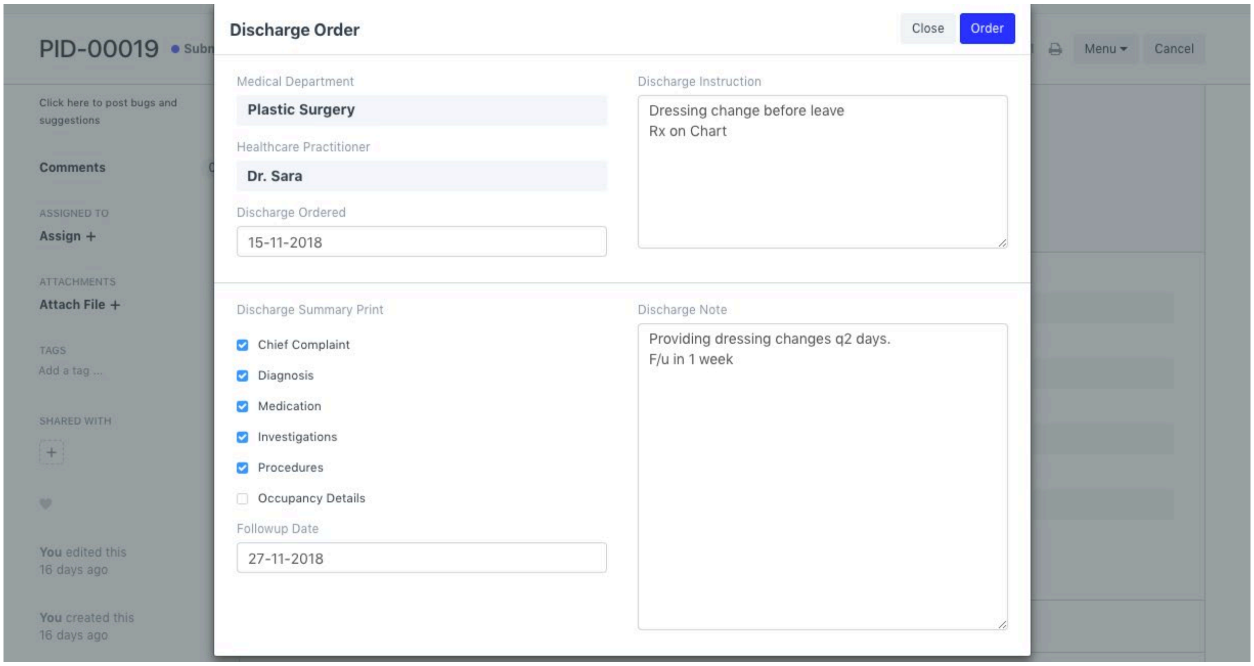
Once a Service Unit is assigned for the patient, the Inpatient Record status will be updated to Admitted.

Discharge

Similar to the Schedule Admission, Patient Encounters for admitted Patients will have the option to Order Discharge triggering the status of the impatient Record to Discharge Scheduled.



The Practitioner can order an inpatient's discharge through a Patient Encounter or the Inpatient Record. The Discharge Order allows Practitioner to select the contents of the Discharge Notes (or the Discharge Summary) which gets updated in the patient's Inpatient Record document. The practitioner can select the investigations, medications and procedures which were included in the Patient's treatment at the facility which are to be printed in the discharge notes and optionally add his comments to print.

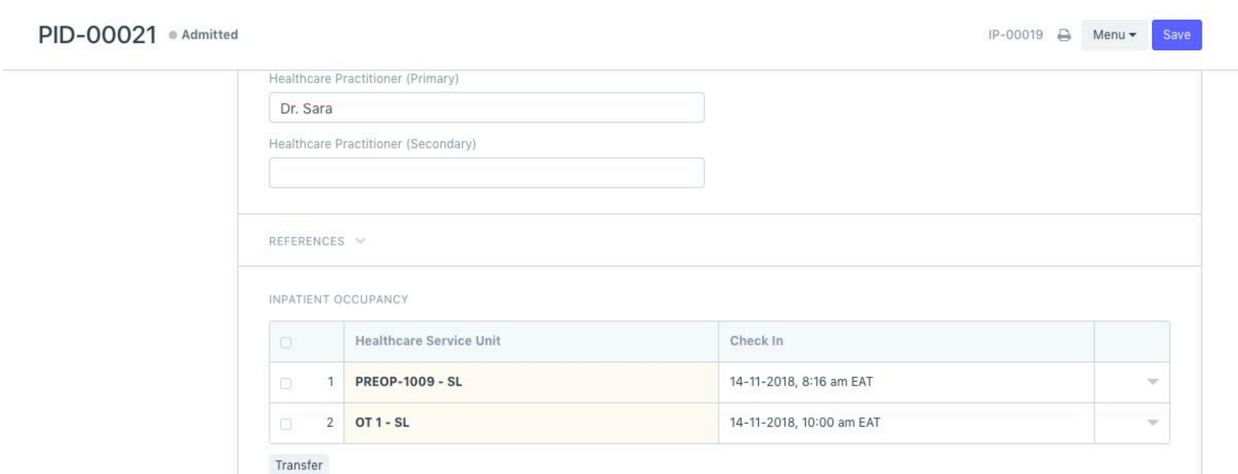


The admission officer can print the Discharge Notes from the Inpatient Record and use the Discharge button to record patient's leave and marking the status to *Discharged*

Note: ERP+ healthcare validates that all services availed during the stay at the facility are Invoiced to successfully complete the Discharge option. However, note that this validation *does not* consider the Invoice status.

Transfer

The Inpatient Record holds all data related to the Patient's stay at the facility including all the wards beds (Service Unit) utilized.



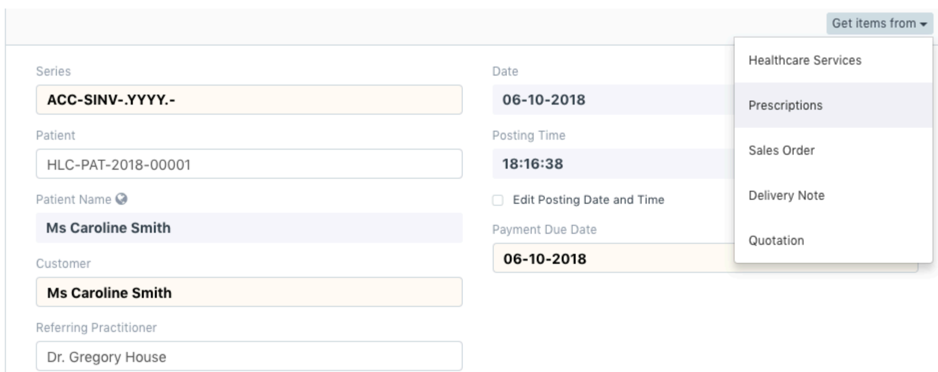
You can always transfer a patient from one Service Unit to another using the Transfer button. This will allow you to select the Service Unit to which the Patient is being transferred.

6. Billing

Billing is an integral part of any undertaking and ERP+ Healthcare achieves this by making use of the Sales Invoice document in the ERP+ Accounts module.

The Healthcare domain links Patient document with Customer and all billable services like, Lab Tests, Clinical Procedures, Consulting Fees etc. with the Item document (with Maintain Stock set to false). You can set the links manually too.

The Sales Invoice already has the Get Items button which helps User to get a list of Items from other related documents. ERP+ Healthcare brings two more option here to fetch all un-billed services for a Patient as well as prescribed medications from Patient Encounter. This way, the billing user can fetch all billable services as well as medications without having to have access to the Patient Encounter or the Healthcare module itself.



Note: All transactions of a Patient are booked against the Customer which it is linked to. You may want to look up various Accounting Reports available in ERP+ Accounts module (like Accounts Receivable) using this Customer link.

1.4 Topic: Healthcare Practitioner

1. Healthcare Practitioner
2. Practitioner Schedule
3. Clinical Procedure
4. Healthcare Service Unit
5. Medical Codes

1. Healthcare Practitioner

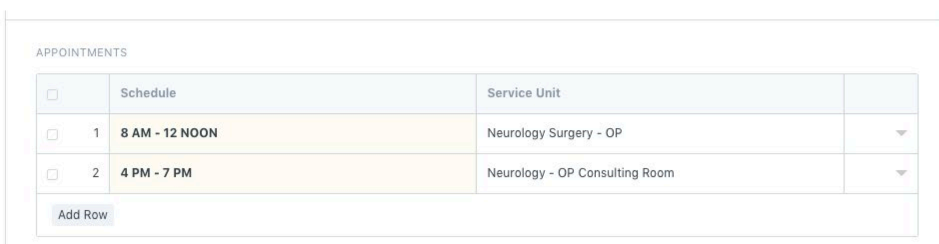
ERP+ Healthcare allows you to create multiple practitioners and link to a User with appropriate Roles. You can create a Practitioner by going to: Healthcare > Masters > Healthcare Practitioner

To enable access rights to ERP+, you may want to attach a User with Physician role for the practitioner. Most Patient related documents like the Encounter, Vitals etc. offer only limited access to users with other roles. You should ideally link the User to Employee document for the user to access Human Resources module so as to utilize the many features like Leaves, Payroll etc.

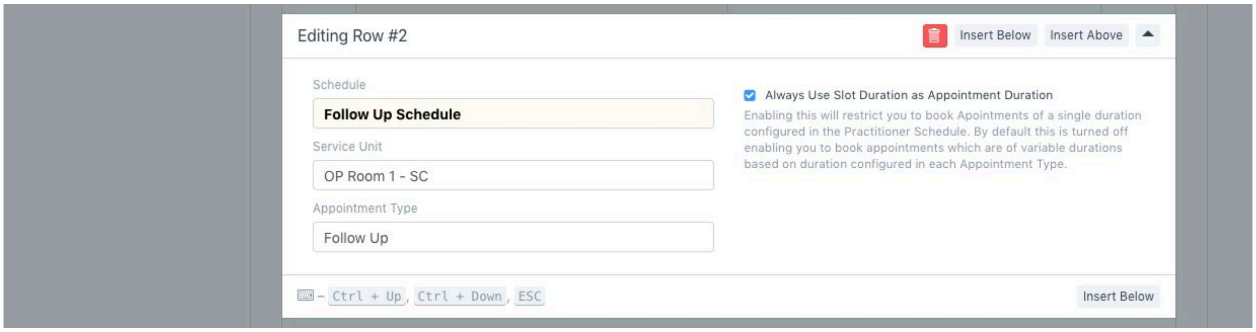
Note: Selecting the Employee field will fetch in all relevant fields as configured in the Employee document to help you easily setup the Practitioner

Availability and Charges

You can select multiple schedules for each practitioner and optionally a service unit at which the practitioner will be available.



You can optionally set an Appointment Type for each schedule to ensure that only those types of appointments can be booked for the time slots available as per the schedule. Leaving this field blank will allow appointments of any type. Also, enabling Always Use Slot Duration as Appointment Duration will override the default behavior of setting appointment duration to the duration configured in the Appointment Type.



You can set the consultation charges which are applicable to the practitioner. If required, you can also select an Income Account for a Physician to book all Consultation charges into separate accounts.

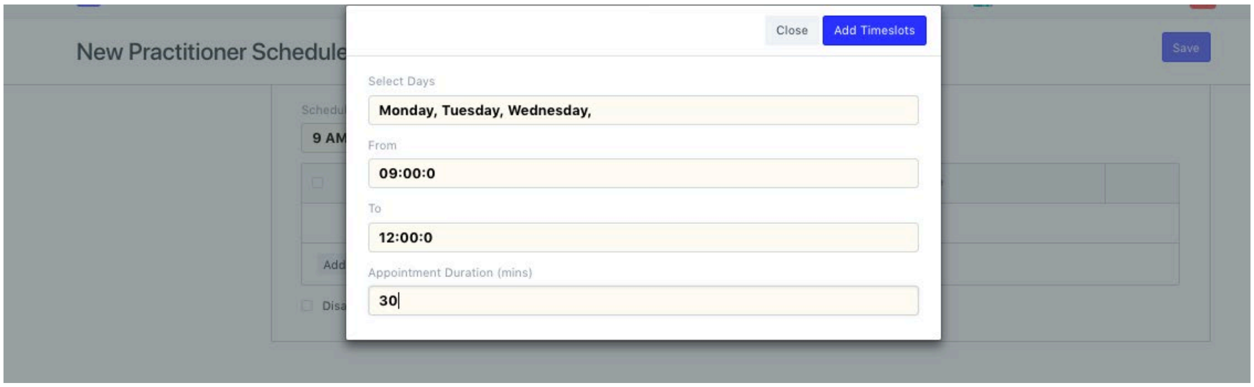
Referring Physicians

You may also want to manage a list of Doctors who refers Patients to your facility. You can manage such data in the Healthcare Practitioner document itself by leaving out the Employee and User links.

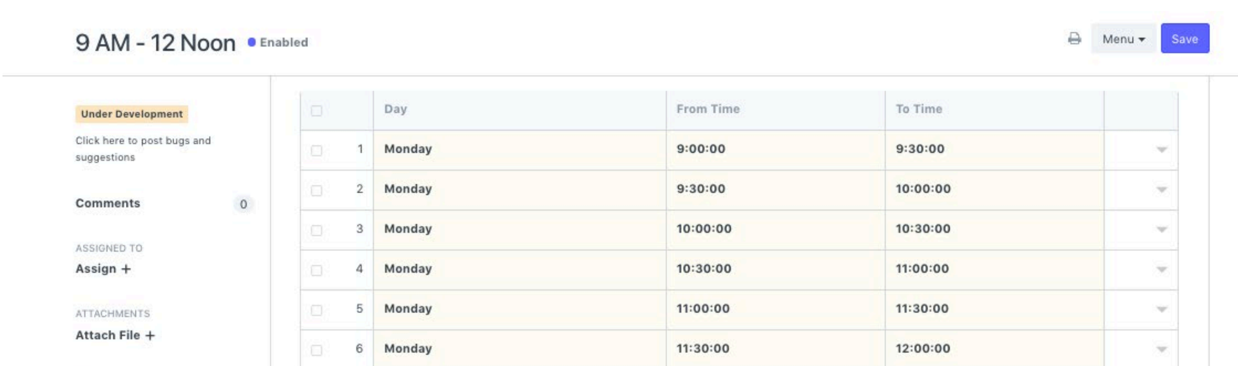
2. Practitioner Schedule

Physician Schedule will help you to configure the availability Healthcare Practitioners. You can then select an applicable schedule for each practitioner.

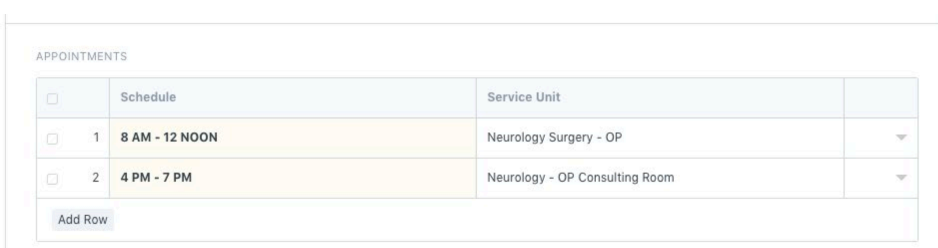
You can create Practitioner Schedule from - Healthcare > Masters > Practitioner Schedule



After naming the schedule you can use the "Add Time Slots" button to create time slots for each day of the week. These time slots will then be displayed while checking the availability of a practitioner while booking an Appointment.



To apply the schedule to a practitioner, open the Practitioner master and select the schedules and the service unit at which the practitioner will be available.



3. Clinical Procedure

You can use this document to map all the clinical procedures, for example, wound cleaning or a cataract surgery. ERP+ allows you to preconfigure Clinical Procedure Templates, so that you do not have to set the default properties like the consumables every time you order a procedure. You can read more on this in the Setting Up Practice page.

You can look up and book Patient Appointment from the ordered procedures for a patient by using the Get Prescribed Procedures button available in-Patient Appointment. The performing practitioner can easily create a new procedure from a booked appointment using the Create > Procedure button.

You can also create a Clinical Procedure by going to: Healthcare > Patient Care > New Clinical Procedure

If you are creating a Clinical Procedure manually, you may want to select a Patient Appointment for the procedure so that all details as provided by the Practitioner while ordering the procedure will be made available. Or you can also select a Clinical Procedure template so as to fetch the details of the procedure as configured in the template.

Procedure Actions

The Practitioner can update the procedure status of the Procedure to In Progress by clicking the Start button. For the procedure to start, adequate quantity of all consumables in the Healthcare Service Unit's Warehouse. If this fails, you can easily record a Stock Transfer from the same screen.

When the procedure is completed, the practitioner can update the *Consumables* table with the actual values of the stock quantity that are used. The Consume and Complete button will record consumption by booking a stock entry and the update the status of the Clinical Procedure to *Completed.* If the Procedure does not have any stock items in the Consumables table, you can merely Complete the procedure.

Billing

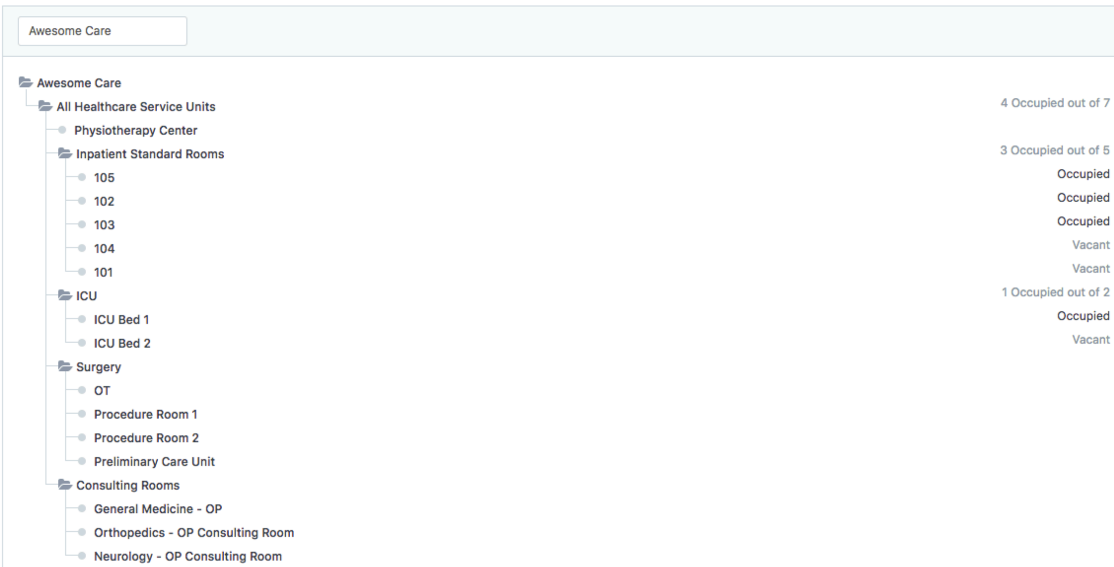
You can create Invoices for procedures performed on a patient by going to Sales Invoice > Get Items From > Healthcare Services. This way the billing officer need not access the Healthcare module documents and the un-billed services for a Patient will be listed which the officer can chose from.

If the Invoice Consumables Separately option is turned on, the charges for the consumable Items will be added to the Sales Invoice separately.

4. Healthcare Service Unit

ERP+ Healthcare helps you map your facility infrastructure and manage scheduling, billing etc. A Healthcare Service Unit corresponds to each such unit which can be scheduled so that these are made available for Appointment booking or Inpatient occupancy and also to be billed. You can create Healthcare Service Units by going to: Healthcare > Masters > Healthcare Service Unit

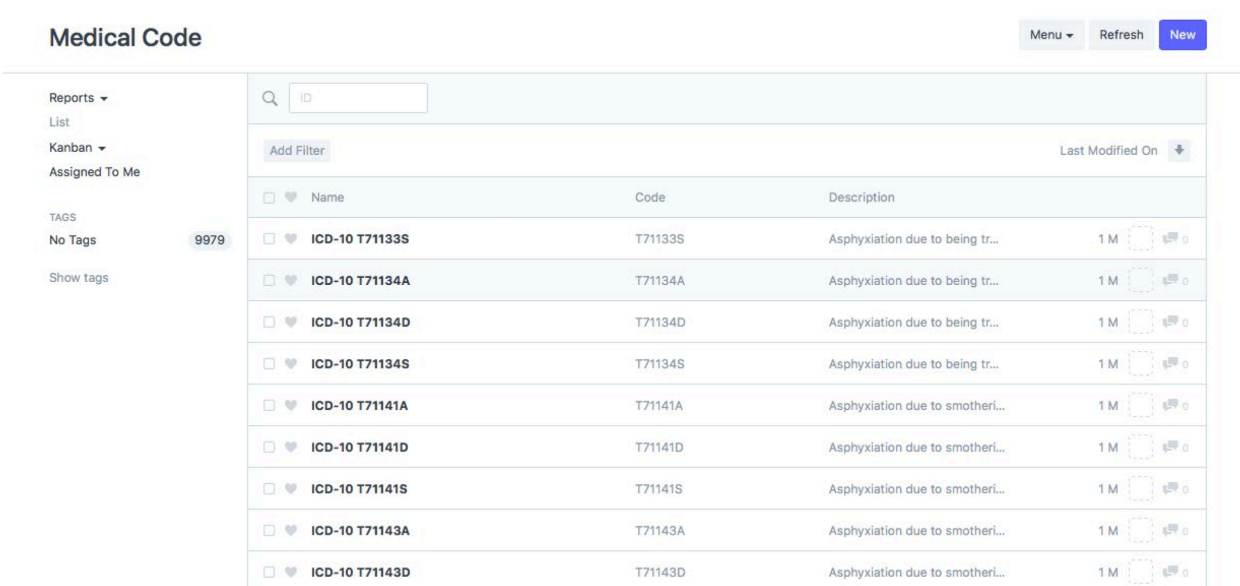
It is also possible that you can group and organize all the service units in a hierarchical fashion.



5. Medical Code Standards

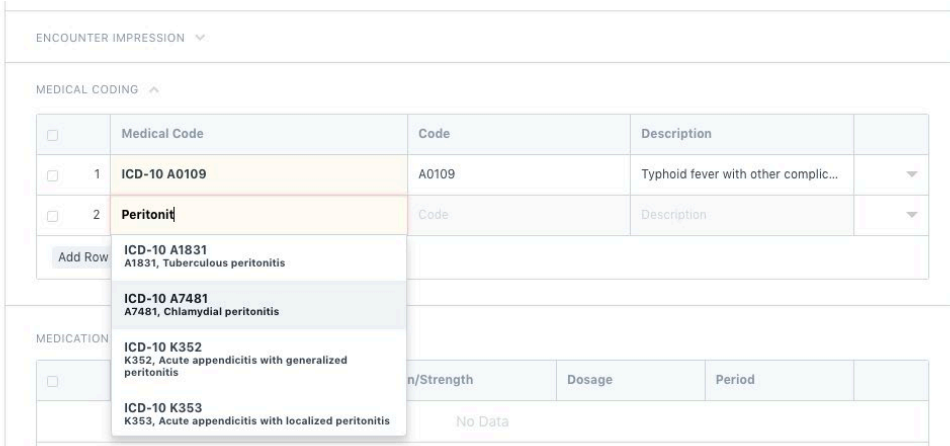
Medical Coding are, in many countries, required for regulatory compliance and many of the Medical Insurance companies manage eligibility and coverage based on Medical Code standards. ERP+ Healthcare offers support, however limited, to encode diagnosis and assessments recorded as part of Patient Encounter. You can also codify Clinical Procedures. You can configure Medical Code Standard and related Medical Codes - which usually can be easily done by data import as the code data tends to be quite large. You can create as many Medical Code Standards as you wish if you need to comply with multiple Coding Standards.

Healthcare > Medical Coding > Medical Code Standard



Medical Code Standard document is used to name the Code Standard and act as a container for all the medical codes which are standardized under it. Medical Codes and descriptions can then be imported to the Medical Code document, after ensuring that you set the Medical Code Standard field appropriately.

In the Patient Encounter, practitioner can easily search and select appropriate ones from preconfigured Medical Codes.



It is also possible that you can link appropriate Medical Codes to Appointment Type, Clinical Procedure Template, Lab Test Template etc. to enable codification based on each of the services your facility offers. In many regions this is mandatory for processing patient *Insurance* eligibility, claim processing and billing.