



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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Technocom Co. W.L.L. - Kingdom of Bahrain

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

1.2 Patient

1. Patient
2. Vital Signs
3. Patient Encounter

1.3 Records and Reports

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

1.4 Healthcare Practitioner

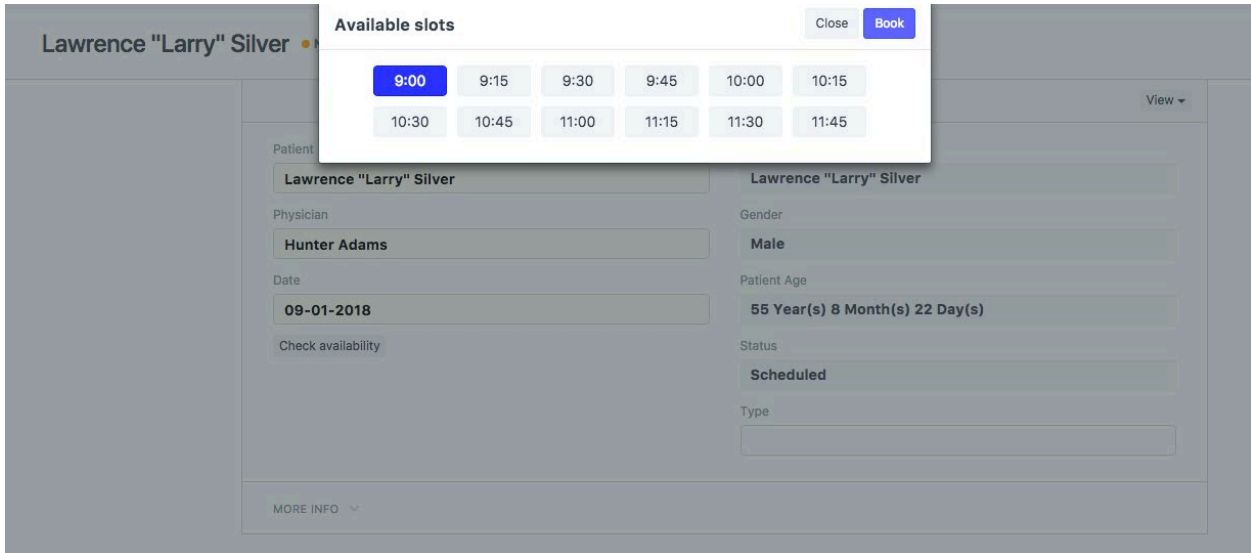
1. Healthcare Practitioner
2. Practitioner Schedule
3. Clinical Procedure
4. Healthcare Service Unit
5. Medical Codes

1.1 Topic: Basics and Setup

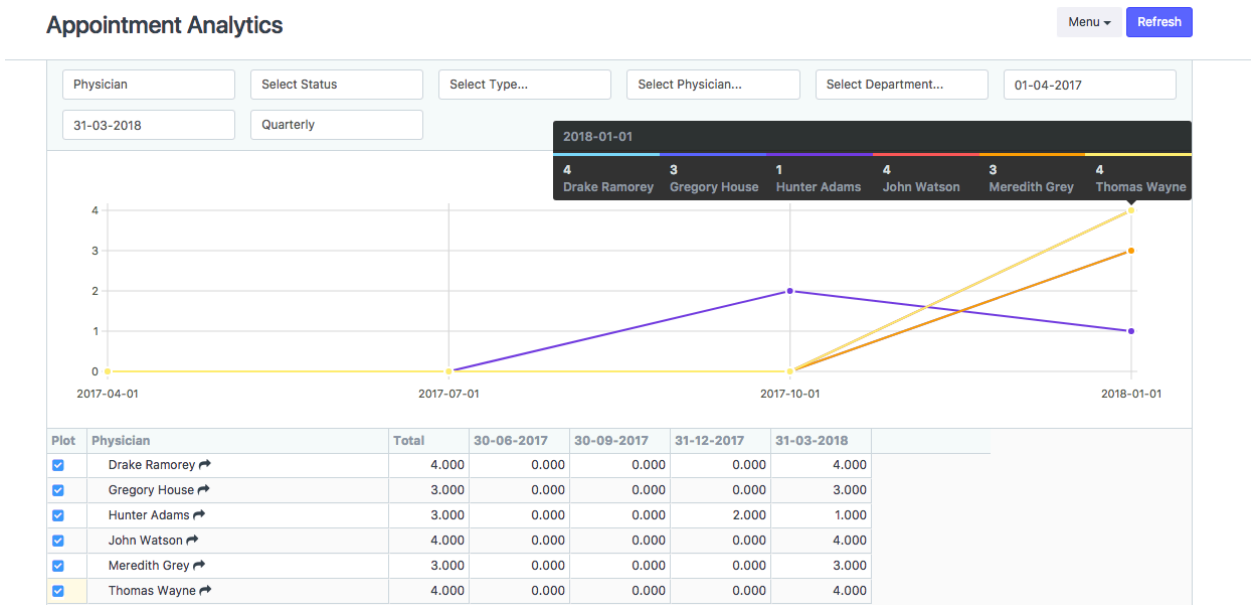
1. Introduction
2. Patient Appointment
3. Setup

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.

Patient Appointment Calendar Menu Refresh New

Last Modified On

Aug 5 - 11, 2018 < today > month week day

	SUN 8/5	MON 8/6	TUE 8/7	WED 8/8	THU 8/9	FRI 8/10	SAT 8/11
all-day							
8am			8:00 - HLC-PAT-2018-00213	8:00 - HLC-PAT-2018-00213	8:00 - HLC-PAT-2018-00213		8:00 - 9:00 HLC-PAT-2018-00213
9am		9:00 - HLC-PAT-2018-00213	8:30 - HLC-PAT-2018-00213	9:00 - 11:00 HLC-PAT-2018-00213	9:00 - 11:00 HLC-PAT-2018-00313	9:30 - HLC-PAT-2018-00213	9:00 - 11:00 HLC-PAT-2018-00213
10am		10:00 - HLC-PAT-2018-00213				10:00 - HLC-PAT-2018-00213	
11am		11:00 - 1:00 HLC-PAT-2018-00002	11:00 - HLC-PAT-2018-00213	11:00 - 1:00 HLC-PAT-2018-00202	11:30 - 1:30 HLC-PAT-2018-00306	11:00 - HLC-PAT-2018-00213	11:00 - 1:00 HLC-PAT-2018-00202
12pm	12:00 - HLC-PAT-2018-00213					12:30 - HLC-PAT-2018-00213	
1pm			1:00 - HLC-PAT-2018-00213			1:00 - HLC-PAT-2018-00213	
2pm	2:00 - HLC-PAT-2018-00213		2:00 - HLC-PAT-2018-00213	2:00 - HLC-PAT-2018-00213	2:00 - HLC-PAT-2018-00213	2:00 - HLC-PAT-2018-00213	2:00 - HLC-PAT-2018-00213
3pm	2:30 - HLC-PAT-2018-00213 3:00 - HLC-PAT-2018-00213	2:30 - 4:30 HLC-PAT-2018-00014	3:00 - HLC-PAT-2018-00213	2:30 - HLC-PAT-2018-00213 3:00 - HLC-PAT-2018-00213 3:40 - 4:40	3:30 - HLC-PAT-2018-00213	3:30 - HLC-PAT-2018-00213	3:00 - HLC-PAT-2018-00213

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.

New Patient Appointment 1 Not Saved

<p>Patient</p> <p>999</p> <p>HLC-PAT-2018-00786 Betty Kenner, +1209999999</p> <p>+ Create a new Patient</p> <p>Q Advanced Search</p>	<p>Procedure</p> <p><input type="text"/></p> <p><input type="button" value="Get Ordered Procedures"/></p> <p>Service Unit</p> <p><input type="text"/></p> <p><input type="button" value="Check Availability"/></p>
--	--

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.

The screenshot displays the 'Available slots' dialog box. It includes the following fields and values:

- Medical Department: Neurology
- Appointment Type: Consultation
- Date: 08-06-2018
- Healthcare Practitioner: Dr. Amelia Shepherd
- Duration: 30

The 'OP Schedule' section shows a grid of time slots. The 13:30 slot is highlighted in green, indicating it is available. Other slots are shown in light blue or light green.

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.

Check availability

Mode of Payment Invoiced

Cash

Paid Amount

500.00

MORE INFO ^

Notes

Referring Practitioner

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.

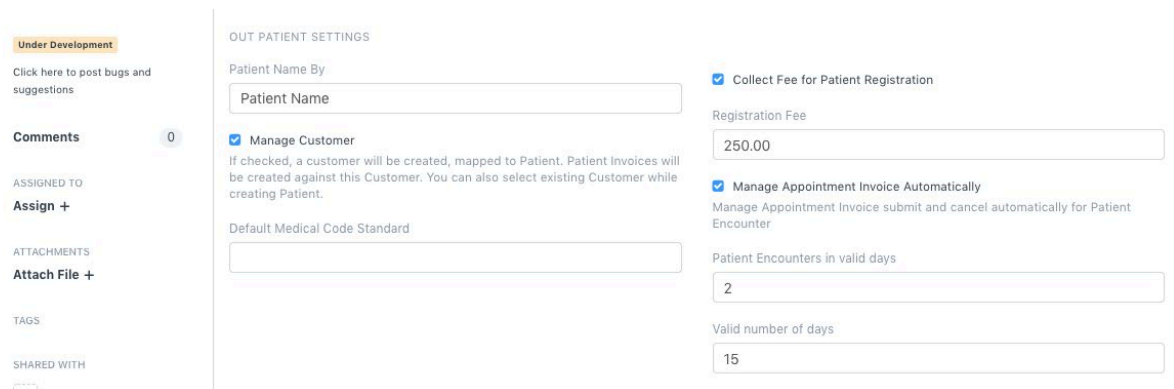
1. Healthcare Settings
2. Setup Practice
3. Setup Inpatient
4. Setup Laboratory
5. Setup Pharmacy

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 link 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

INCOME ACCOUNT ^

Default income accounts to be used if not set in Healthcare Practitioner to book Appointment charges.

	Company	Account	
<input type="checkbox"/>	1 Awesome Care	4120 - Service - AC	▼

[Add Row](#)

RECEIVABLE ACCOUNT ^

Default receivable accounts to be used if not set in Patient to book Appointment charges.

	Company	Account	
<input type="checkbox"/>	1 Awesome Care	1310 - Debtors - AC	➔ ▼

[Add Row](#)

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

Laboratory Settings

LABORATORY SETTINGS ^

Create Lab Test(s) on Sales Invoice Submit Employee name and designation in print

Manage Sample Collection
Create documents for sample collection

Require Lab Test Approval

LABORATORY SMS ALERTS ^

Result Printed

Hello {{doc.patient}}, Your {{doc.lab_test_name}} result is ready with {{doc.company}}.
Thank You, Good day!

Result Emailed

Hello {{doc.patient}}, Your {{doc.lab_test_name}} result has been emailed to {{doc.email}}.
{{doc.company}}.
Thank You, Good day!

- 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

The screenshot shows the configuration page for an 'ICU Bed' service unit type. The page is titled 'ICU Bed' and is marked as 'Enabled'. On the right side, there are buttons for 'Menu' and 'Save', and a 'Disable' button. Below these are 'Change Item Code' and 'Disable' buttons. The main content area is divided into two sections: 'ITEM DETAILS' and 'Properties'. The 'ITEM DETAILS' section includes fields for 'Item' (ICU Bed), 'Item Code' (ICU Bed), 'Item Group' (Inpatient Ward Beds), 'UOM' (Hour), and 'UOM Conversion in Hours' (1). The 'Properties' section includes 'Rate / UOM' (250.00), a 'Disabled' checkbox, and a 'Description' field (ICU Bed). On the left side, there is a sidebar with 'Comments' (0), 'ASSIGNED TO' (Assign +), 'ATTACHMENTS' (Attach File +), 'TAGS' (Add a tag ...), and 'SHARED WITH' (+). At the bottom left, there are two status messages: 'You edited this a few seconds ago' and 'You created this a minute ago'.

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

The screenshot shows the configuration page for 'OP Consultation Room', which is currently 'Enabled'. The interface includes a 'Comments' section with a count of 0, an 'ASSIGNED TO' field with an 'Assign +' button, and two checkboxes: 'Allow Appointments' (checked) and 'Allow Overlap' (unchecked). At the top right, there are 'Menu' and 'Save' buttons. At the bottom right, there are 'Change Item Code' and 'Disable' buttons.

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

Baby Anne ● Not Saved
HLC-PAT-2018-00006 🗑️ Menu - Save

View - Create -



Under Development

Click here to post bugs and suggestions

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
📎 8.jpg ×

Attach File +

TAGS
Add a tag ...


SHARED WITH

You edited this
14 days ago

You created this
14 days ago

DASHBOARD ^

NovDecJanFebMarAprMayJunJulAugSep



This is based on transactions against this Patient. See timeline below for details

Appointments and Patient Encounters

Patient Appointment 1 +

Patient Encounter 2 2 +

Lab Tests and Vital Signs

Lab Test 2 2 +

Sample Collection 1 1 +

Vital Signs 1 1 +

Billing

Sales Invoice +

PATIENT DEMOGRAPHICS

<p style="font-size: 0.8em; margin-bottom: 5px;">Inpatient Status</p> <div style="background-color: #e9ecef; padding: 2px; border: 1px solid #dee2e6; display: inline-block; font-weight: bold; font-size: 0.8em;">Admitted</div>	<p style="font-size: 0.8em; margin-bottom: 5px;">Customer</p> <div style="background-color: #e9ecef; padding: 2px; border: 1px solid #dee2e6; display: inline-block; font-weight: bold; font-size: 0.8em;">Baby Anne</div>
<p style="font-size: 0.8em; margin-bottom: 5px;">Inpatient Record</p> <div style="background-color: #e9ecef; padding: 2px; border: 1px solid #dee2e6; display: inline-block; font-weight: bold; font-size: 0.8em;">HLC-INP-2018-00005</div>	<p style="font-size: 0.8em; margin-bottom: 5px;">Report Preference</p> <input style="width: 100%; height: 20px; border: 1px solid #dee2e6;" type="text"/>
<p style="font-size: 0.8em; margin-bottom: 5px;">Full Name</p> <div style="background-color: #e9ecef; padding: 2px; border: 1px solid #dee2e6; display: inline-block; font-weight: bold; font-size: 0.8em;">Baby Anne</div>	<p style="font-size: 0.8em; margin-bottom: 5px;">Mobile</p> <input style="width: 100%; height: 20px; border: 1px solid #dee2e6;" type="text"/>
<p style="font-size: 0.8em; margin-bottom: 5px;">Gender</p> <div style="background-color: #e9ecef; padding: 2px; border: 1px solid #dee2e6; display: inline-block; font-weight: bold; font-size: 0.8em;">Female</div>	<p style="font-size: 0.8em; margin-bottom: 5px;">Email</p> <input style="width: 100%; height: 20px; border: 1px solid #dee2e6;" type="text" value="babyanne@test.com"/>
<p style="font-size: 0.8em; margin-bottom: 5px;">Blood Group</p> <div style="background-color: #e9ecef; padding: 2px; border: 1px solid #dee2e6; display: inline-block; font-weight: bold; font-size: 0.8em;">B Positive</div>	<p style="font-size: 0.8em; margin-bottom: 5px;">Phone</p> <input style="width: 100%; height: 20px; border: 1px solid #dee2e6;" type="text"/>
<p style="font-size: 0.8em; margin-bottom: 5px;">Date of birth</p> <input style="width: 100%; height: 20px; border: 1px solid #dee2e6;" type="text" value="28-08-2018"/>	

AGE : 0 Year(s) 4 Month(s) 18 Day(s)

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.

The screenshot displays the ERP+ Healthcare Patient document interface. On the left, there is a sidebar with navigation options: 'Click here to post bugs and suggestions', 'Comments' (0), 'ASSIGNED TO' (Assign +), 'ATTACHMENTS' (Attach File +), and 'TAGS' (Add a tag...). The main content area is divided into sections: 'Appointments and Consultations' (Patient Appointment 5 +, Consultation 1 1 +) and 'Lab Tests' (Lab Test 4 2 +). Below these is the 'PATIENT DEMOGRAPHICS' section, which includes 'Full Name' (Caroline Smith), 'Gender' (Female), and 'Report Preference'. A 'Customer Link' section is highlighted with a red oval, showing 'Customer' and 'PID-00001'.

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

New Vital Signs 1 ● Not Saved Save

<p>Body Temperature</p> <input type="text"/> <p>Presence of a fever (temp > 38.5 °C/101.3 °F or sustained temp > 38 °C/100.4 °F)</p> <p>Heart Rate / Pulse</p> <input type="text"/> <p>Adults' pulse rate is anywhere between 50 and 80 beats per minute.</p> <p>Respiratory rate</p> <input type="text"/> <p>Normal reference range for an adult is 16-20 breaths/minute (RCP 2012)</p>	<p>Blood Pressure (systolic)</p> <input type="text"/> <p>Blood Pressure (diastolic)</p> <input type="text"/> <p>Notes</p> <div style="border: 1px solid #ccc; height: 60px;"></div>
<p>NUTRITION VALUES</p> <p>Height (In Meter)</p> <input type="text"/> <p>Weight (In Kilogram)</p> <input type="text"/> <p>BMI</p> <input type="text"/>	<p>Notes</p> <div style="border: 1px solid #ccc; height: 60px;"></div>

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.

<p>NUTRITION VALUES</p> <p>Height (In Meter)</p> <input type="text" value="1.700"/> <p>Weight (In Kilogram)</p> <input type="text" value="72.000"/> <p>BMI</p> <input type="text" value="24.910"/>	<p>Notes</p> <div style="border: 1px solid #ccc; padding: 5px;">Normal</div>
---	--

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.

<p>Comments 0</p> <p>ASSIGNED TO</p> <p>Assign +</p> <p>ATTACHMENTS</p> <p>Attach File +</p> <p>TAGS</p> <p>Add a tag...</p> <p>SHARED WITH</p> <p>+ 0</p> <p>You edited this a minute ago</p> <p>You created this a minute ago</p>	<p>Appointment</p> <p>OP-000002</p>	<p>Department</p> <p>Neurology</p>
	<p>Patient</p> <p>PID-00001</p>	<p>Consultation Date</p> <p>23-08-2017</p>
	<p>Doctor</p> <p>Dr. Rob</p>	<p>Consultation Time</p> <p>17:01:17</p>
	<p>PATIENT DETAILS ^</p> <p>Personal Details</p> <p>Age : 47 Year(s) 7 Month(s) 30 Day(s)</p> <p>Gender : Female</p> <p>Blood group : B Positive</p> <p>Occupation : Bank Clerk</p> <p>Mobile : 9846499464</p> <p>Patient Details</p> <p>Allergies : Penicillin; experienced rash and hives in 1985</p> <p>Medical history : 2001: Diagnosed with hypertension and began on unknown medication. Stopped after 6 months because of drowsiness.</p>	

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

<p>ENCOUNTER IMPRESSION ^</p>	
<p>Complaints</p> <p><input type="text"/></p> <p><input type="text"/></p>	<p>Diagnosis</p> <p><input type="text"/></p> <p><input type="text"/></p>
<p><input type="checkbox"/> In print</p>	<p><input checked="" type="checkbox"/> In print</p>

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.

MEDICATION

<input type="checkbox"/>	Drug Code	Description/Strength	Dosage	Period	
No Data					
<input type="button" value="Add Row"/>					

INVESTIGATIONS

<input type="checkbox"/>	Test Code	Test	Comments
No Data			
<input type="button" value="Add Row"/>			

PROCEDURES

<input type="checkbox"/>	Procedure	Procedure Name	Referral	Date	Comments
No Data					

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.

<input type="checkbox"/>	Medical Code	Code	Description
<input type="checkbox"/>	1 ICD-10 A0109	A0109	Typhoid fever with other complic...
<input type="checkbox"/>	2 Peritonit	Code	Description
<input type="button" value="Add Row"/>			
ICD-10 A1831 A1831, Tuberculous peritonitis			
ICD-10 A7481 A7481, Chlamydial peritonitis			
ICD-10 K352 K352, Acute appendicitis with generalized peritonitis			
ICD-10 K353 K353, Acute appendicitis with localized peritonitis			
No Data			

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.

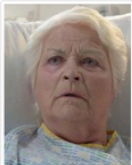
ERP+ Healthcare helps you to draw up the medical history of a Patient anytime by quickly searching and selecting the Patient. View > Medical Record button is available in all forms where Healthcare Practitioners act, so that they can easily switch to the Patient Medical History page to view the patient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

Patient History

Select Patient

HLC-PAT-2018-18021



Sally Hodge
Female
sally@mail.sh
+15670005

Blood group : A Positive

Allergies :
Shellfish
Sulfa drugs - rash
Cipro - rash
Benadryl - causes mild dystonic reaction

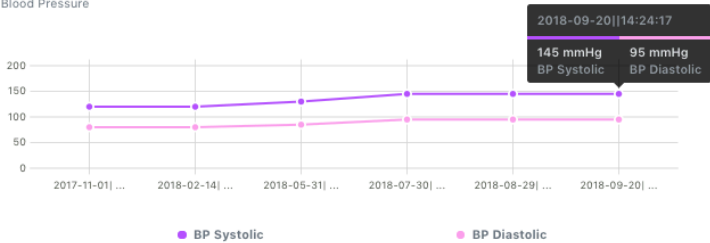
Medication : Diuretics

Alcohol use : Rare
Alcohol past use : Moderate
Tobacco use : Non Smoker
Tobacco past use : Smoker


Medical history :
Iron deficiency anemia
Surgical history :
Kidney stone retrieval 1990s
Hernia repair, November 2016

Blood Pressure
Respiratory/Pulse Rate
Temperature
BMI


Blood Pressure



Date	BP Systolic (mmHg)	BP Diastolic (mmHg)
2017-11-01	~120	~80
2018-02-14	~125	~85
2018-05-31	~130	~90
2018-07-30	~140	~95
2018-08-29	~145	~95
2018-09-20	145	95

 Dr. Sara Patient Medical Record on 20th September 2018

Patient Medical Record (HLC-PMR-2018-00012)
CT (Non Contrast): No history of trauma or prior ocular inflammation was noted. Right-sided lens prosthesis is noted. T2W = T2-weighted

 Dr. John H Watson Patient Encounter on 20th September 2018

Patient Encounter (HLC-ENC-2018-00001-2)
Dr. John H Watson
Symptoms: Chronic headaches. Complains of acute onset of double vision and right eyelid droopiness three days ago.
Diagnosis: Hypertension, primarily. However, possibility of a genetic disorder such as CADASIL cannot be excluded.
Test(s) Prescribed.

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.

HLC-PAT-2018-00001 ● 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

Admission Order Close Order

PID-00004 • Sub

Medical Department: **Plastic Surgery**

Healthcare Practitioner (Primary): **Dr. Sara**

Healthcare Practitioner (Secondary):

Admission Ordered For: 14-11-2018

Service Unit Type: Pre Op Ward Bed

Expected Length of Stay: 7

Diagnosis: Flexor Tenosynovitis L D3

Admission Instruction: Patient is Pre Op, NPO at night
Activity as tolerated; Splint L hand
IV RL @ 100cc/hr while NPO
Vitals q8h (more frequent if patient unstable)
Patient's home meds
Anaesthesia consult (if patient has other co-morbidities and high risk for surgery)

PROCEDURE ORDERS

Procedure	Practitioner	Date	Comments
CPT 12	Liban Ilaal	2018-10-22	

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

Caroline Smith Submitted LT -00036 Menu Cancel

ASSIGNED TO Assign + ATTACHMENTS Attach File + TAGS Add a tag... SHARED WITH + 0 You edited this a few seconds ago You created this 3 minutes ago	Patient	Department
	Caroline Smith	Biochemistry
	Age	Sample ID
	61 Year(s) 6 Month(s) 24 Day(s)	SMPL-00009
	Gender	Result Date
	Female	11-08-2017
	Doctor	Lab Technician
	Dr. Rob	EMP/0004: Lab Assistant
	Referring Physician	Technician Name
	Dr. David R	Lab Assistant
	Designation	Report Preference
	Lab Technician	Email
	Test Name	Test Template
	Fasting Lipid Profile	LPT

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

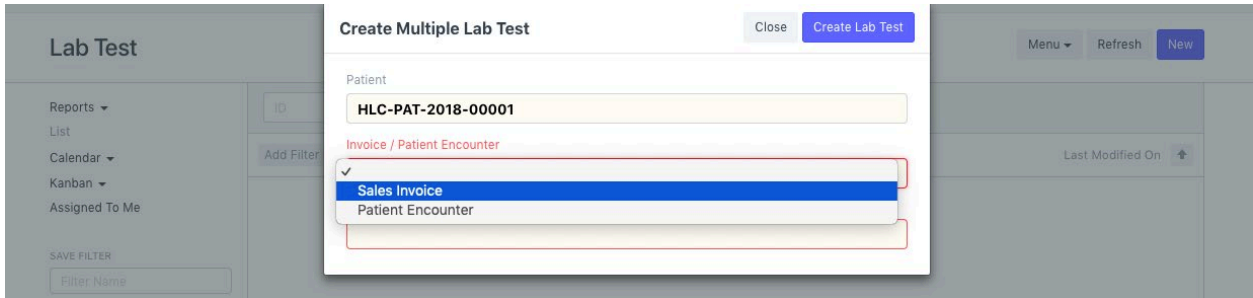
Lab Test Menu Refresh New

Search: ID [] Patient: [] Test Name: []

Filters: Add Filter

- Create Multiple
- Import
- User Permissions
- Role Permissions Manager

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.

Test Name		Test Template				
Fasting Lipid Profile		LPT				
<input type="checkbox"/>	Test Name	Event	Result Value	UOM	Normal Range	
<input type="checkbox"/>	1 Cholesterol	Event	180	mg / dl	Less than 200 mg / dl	▼
<input type="checkbox"/>	2 Triglyceride		70	mg / dl	60 - 80 mg / dl	▼
<input type="checkbox"/>	3 HDL (Serum)		60	mg / dl	35 - 65 mg/dl	▼
<input type="checkbox"/>	4 LDL (Serum)		140	mg / dl	70 - 160 mg/dl	▼
<input type="checkbox"/>	5 VLDL (Serum)		20	mg / dl	10 - 30 mg/dl	▼
Add Row						

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.

The screenshot shows a web form for creating a Sample Collection document. The form is titled "PID-00001" and is in "Draft" status. On the right side, there is a "Submit" button and a "View Lab Tests" link. The form contains several fields: "Patient" (PID-00001), "Age" (47 year(s) 7 month(s) 29 day(s)), "Gender" (Female), "Sample" (Blood), "Quantity" (1), "Collected By" (nurse@erpnext.com), "Collected Time" (02-08-2017 07:59:10), and "No. of print" (3). There is a "Submit this document to confirm" button at the top. On the left side, there are sections for "Under Development", "Comments" (0), "ASSIGNED TO" (Assign +), "ATTACHMENTS" (Attach File +), "TAGS" (Add a tag...), and "SHARED WITH" (+). At the bottom left, there is a notification: "You edited this a few seconds ago".

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.

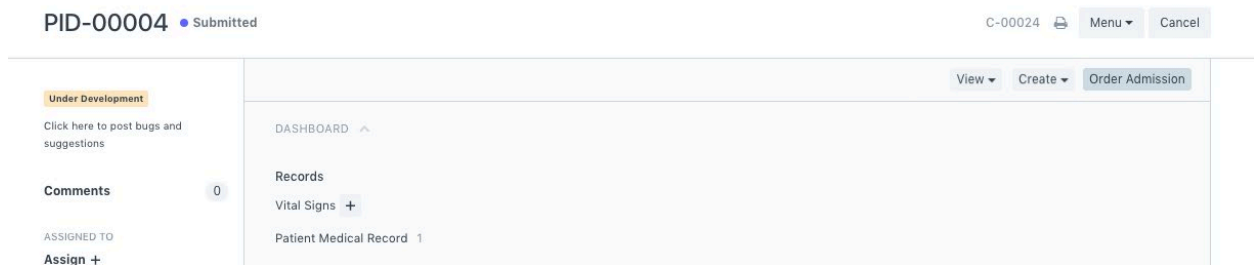
Printing of sample identification tags is also possible. By default, a sample sticker print template is made available, but you can always customize this directly using the Print Format Builder or even create a custom Print Format if required.

5. Inpatient ADT

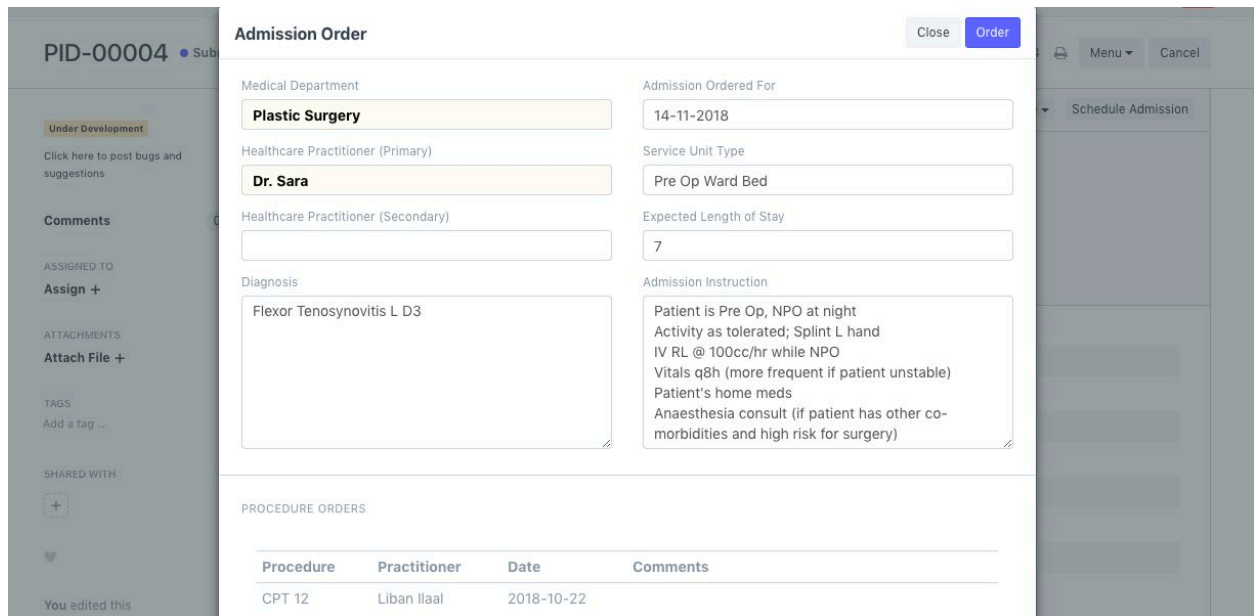
Managing ADT (Admission, Discharge, Transfer) in a busy Hospital is quite a tricky function and ERP+ Healthcare eases this to a great extent. In ERP+ Healthcare every patient admission is managed using the Inpatient Record document.

Admission

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



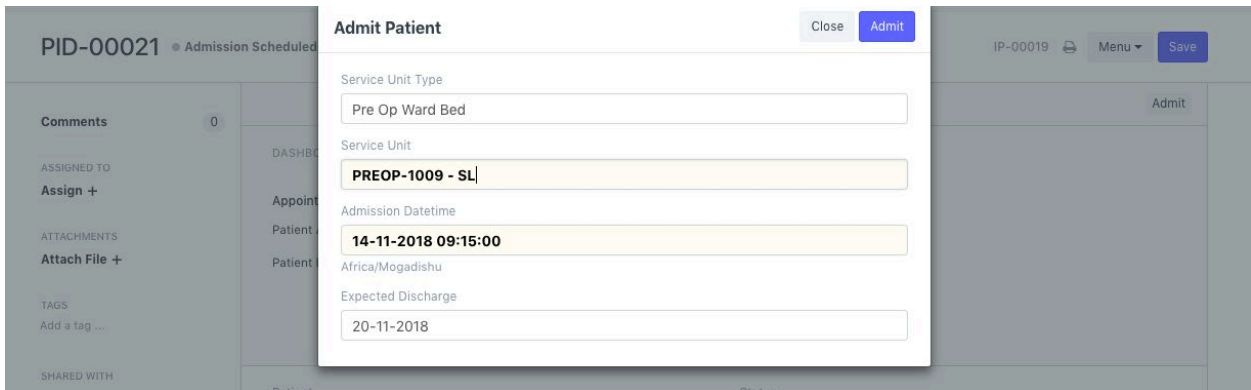
As part of the Admission Order, the practitioner can provide necessary details as to which type of ward bed the Patient needs to be admitted to, and any other admission instructions for the staff.



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

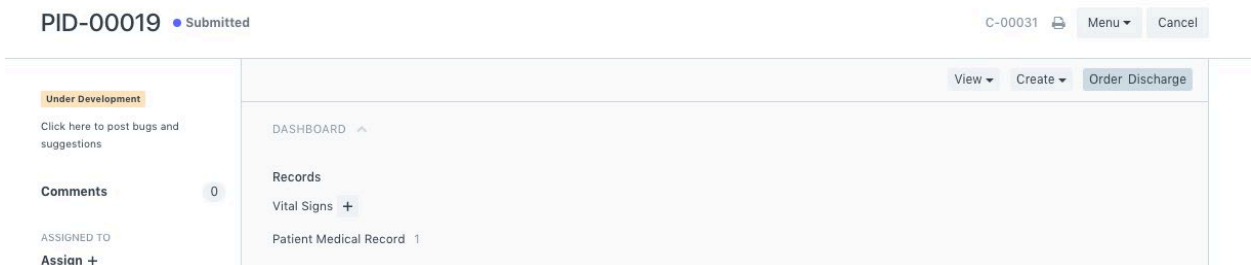
Inpatient admission officer can see the Inpatient Record with status Admission Scheduled and allot the Patient the Ward as per the availability. The Admit button in the Inpatient Record will allow the admission officer to select a ward bed for the Patient and process the admission.



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 inpatient 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.

Discharge Order Close Order

PID-00019 • Subm

Click here to post bugs and suggestions

Comments

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

SHARED WITH
+

You edited this 16 days ago

You created this 16 days ago

Medical Department
Plastic Surgery

Healthcare Practitioner
Dr. Sara

Discharge Ordered
15-11-2018

Discharge Instruction
Dressing change before leave
Rx on Chart

Discharge Summary Print

- Chief Complaint
- Diagnosis
- Medication
- Investigations
- Procedures
- Occupancy Details

Followup Date
27-11-2018

Discharge Note
Providing dressing changes q2 days.
F/u in 1 week

Menu Cancel

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.

PID-00021 • Admitted IP-00019 Menu Save

Healthcare Practitioner (Primary)
Dr. Sara

Healthcare Practitioner (Secondary)

REFERENCES ▾

INPATIENT OCCUPANCY

<input type="checkbox"/>	Healthcare Service Unit	Check In	
<input type="checkbox"/>	1 PREOP-1009 - SL	14-11-2018, 8:16 am EAT	▾
<input type="checkbox"/>	2 OT 1 - SL	14-11-2018, 10:00 am EAT	▾

Transfer

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.

The screenshot displays a billing form with the following fields and values:

- Series:** ACC-SINV-.YYYY.-
- Patient:** HLC-PAT-2018-00001
- Patient Name:** Ms Caroline Smith
- Customer:** Ms Caroline Smith
- Referring Practitioner:** Dr. Gregory House
- Date:** 06-10-2018
- Posting Time:** 18:16:38
- Payment Due Date:** 06-10-2018

A dropdown menu titled "Get items from" is open, showing the following options:

- Healthcare Services
- Prescriptions
- Sales Order
- Delivery Note
- Quotation

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

Dr. Gregory
Dr. Gregory House Menu Save



Under Development

Click here to post bugs and suggestions

Comments 0

DASHBOARD ^



This is based on transactions against this Healthcare Practitioner.

Appointments and Patient Encounters

Patient Appointment 99+ 24 +

Patient Encounter 11 8 +

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.

APPOINTMENTS			
		Schedule	Service Unit
<input type="checkbox"/>	1	8 AM - 12 NOON	Neurology Surgery - OP ▼
<input type="checkbox"/>	2	4 PM - 7 PM	Neurology - OP Consulting Room ▼
Add Row			

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.

Editing Row #2 Insert Below Insert Above ▲

Schedule

Service Unit

Appointment Type

Always Use Slot Duration as Appointment Duration
Enabling this will restrict you to book Appointments of a single duration configured in the Practitioner Schedule. By default this is turned off enabling you to book appointments which are of variable durations based on duration configured in each Appointment Type.

⌨ - Ctrl + Up, Ctrl + Down, ESC Insert Below

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.

CHARGES

Out Patient Consulting Charge Item <input type="text" value="OP-C"/>	Inpatient Visit Charge Item <input type="text" value="IP-V"/>
OP Consulting Charge <input type="text" value="500.00"/>	Inpatient Visit Charge <input type="text" value="300.00"/>

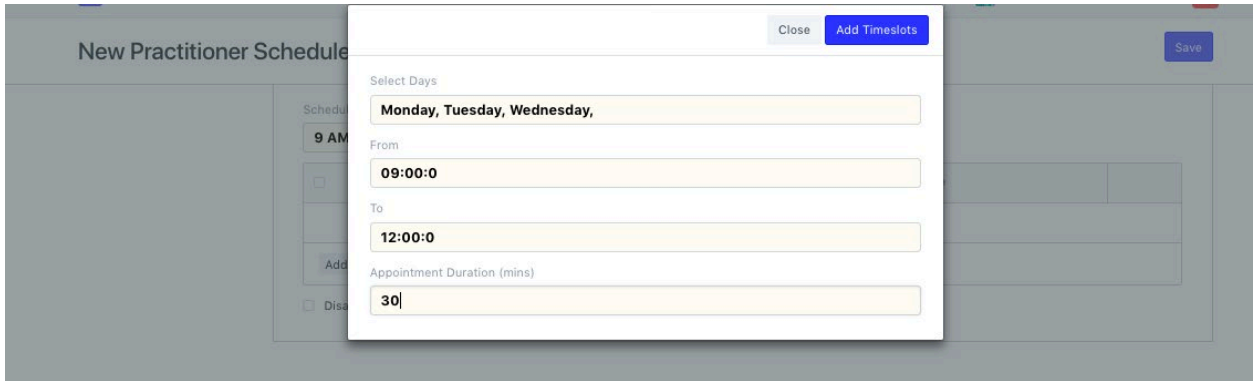
Referring Physicians

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.

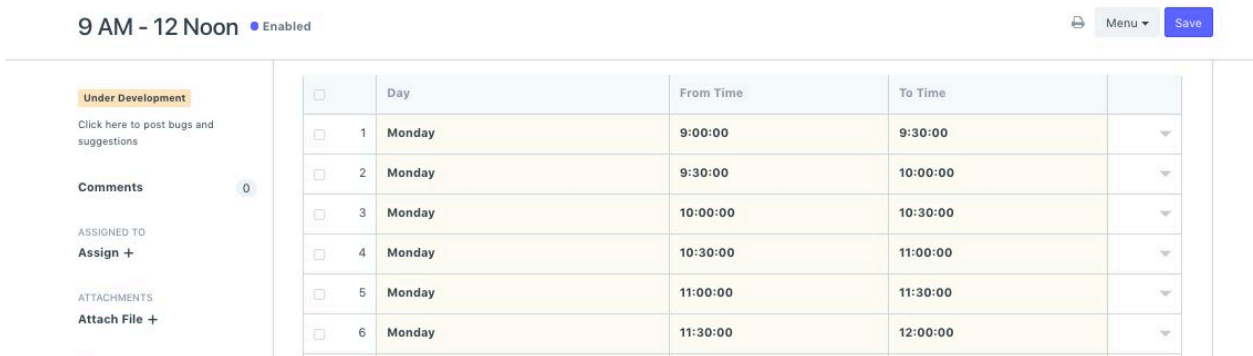
2. Practitioner Schedule

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

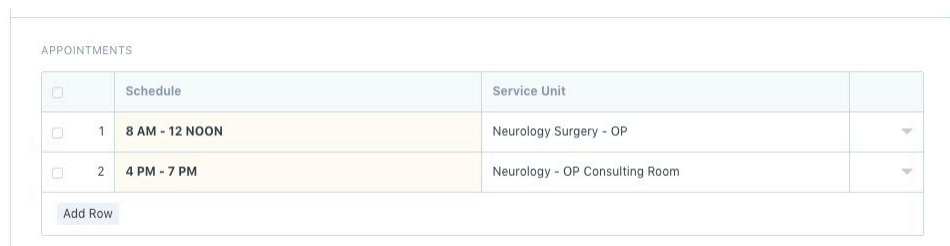
You can create Practitioner Schedule from - Healthcare > Masters > Practitioner Schedule



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

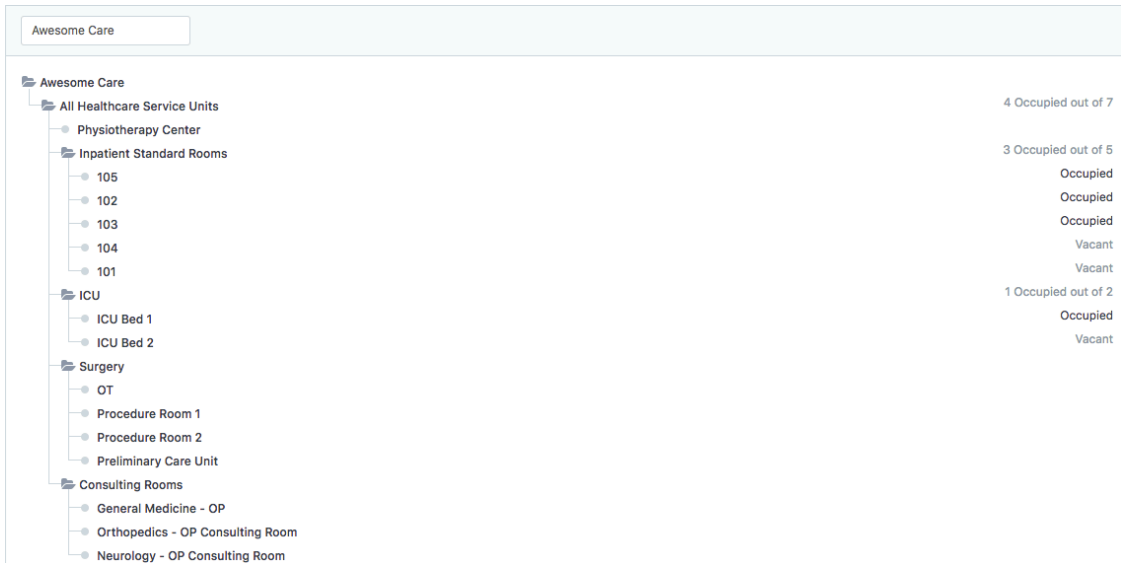
You can create Invoices for procedures performed on a patient by going to Sales Invoice > Get Items From > Healthcare Services. This way the billing officer need not access the Healthcare module documents and the un-billed services for a Patient will be listed which the officer can chose from.

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
Menu ▾ Refresh New

Reports ▾

List

Kanban ▾

Assigned To Me

Add Filter Last Modified On ▾

	Name	Code	Description	
<input type="checkbox"/>	ICD-10 T71133S	T71133S	Asphyxiation due to being tr...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71134A	T71134A	Asphyxiation due to being tr...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71134D	T71134D	Asphyxiation due to being tr...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71134S	T71134S	Asphyxiation due to being tr...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71141A	T71141A	Asphyxiation due to smotheri...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71141D	T71141D	Asphyxiation due to smotheri...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71141S	T71141S	Asphyxiation due to smotheri...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71143A	T71143A	Asphyxiation due to smotheri...	1 M 🗨️ 0
<input type="checkbox"/>	ICD-10 T71143D	T71143D	Asphyxiation due to smotheri...	1 M 🗨️ 0

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.

ENCOUNTER IMPRESSION ▾

MEDICAL CODING ▲

<input type="checkbox"/>	Medical Code	Code	Description	
<input type="checkbox"/>	1 ICD-10 A0109	A0109	Typhoid fever with other complic...	▾
<input type="checkbox"/>	2 Peritonit	Code	Description	▾
<input type="button" value="Add Row"/>	ICD-10 A1831 A1831, Tuberculous peritonitis			
	ICD-10 A7481 A7481, Chlamydial peritonitis			
MEDICATION	ICD-10 K352 K352, Acute appendicitis with generalized peritonitis	n/Strength	Dosage	Period
<input type="checkbox"/>	ICD-10 K353 K353, Acute appendicitis with localized peritonitis	No Data		

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.