



Comprehensive User Guide for Clinic Assistants: Digital Outpatient Clinic Management & EMR Platform

Introduction

Welcome to your role as a Clinic Assistant on our digital outpatient clinic management and electronic medical record (EMR) generation platform. This guide will walk you through all the functions available to you and provide step-by-step instructions to efficiently manage the clinic's digital operations. Your role is crucial in ensuring smooth patient flow and supporting doctors in providing quality care.

Key Features Overview

- **Booking Management:** Process incoming booking requests efficiently
- **Appointment Scheduling:** Organize patient appointments and manage the daily schedule
- **Patient Record Management:** Maintain accurate patient information
- **Prescription Access:** Retrieve and share prescriptions with patients
- **WhatsApp Integration:** Send automated notifications and prescription documents

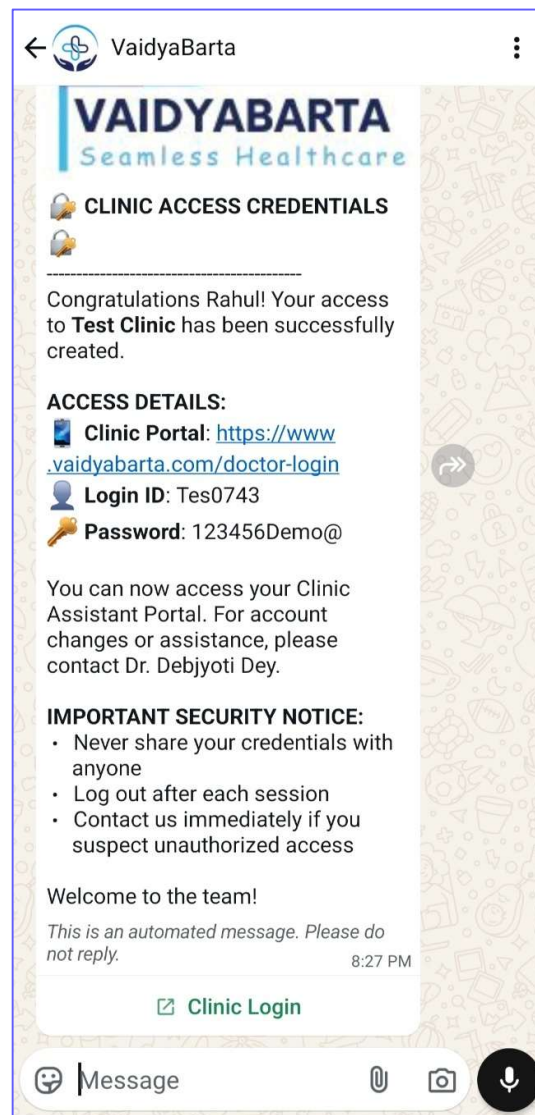
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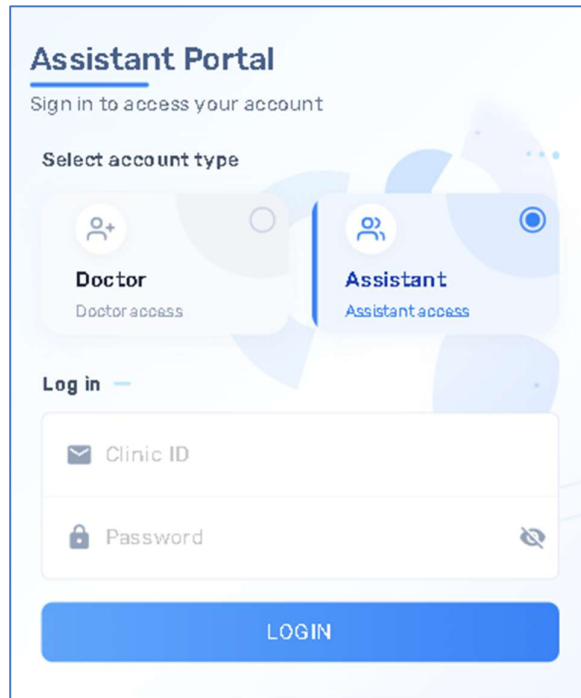
Detailed Functionality

1. Accessing The System

- Use the clinic-specific credentials provided by the doctor
 - a. During the clinic onboarding process, the doctor will register you as an assistant using your WhatsApp number. You will then receive a WhatsApp message containing the Clinic Portal link, along with your Login ID and Password, as shown below.




- b. When you click on the given portal link from WhatsApp, you will be redirected to the login page. Select the **Assistance** option. Enter the **Clinic ID** and **Password** that you received on your WhatsApp. Click the **Login** button.




Assistant Portal
Sign in to access your account

Select account type



Doctor
Doctor access

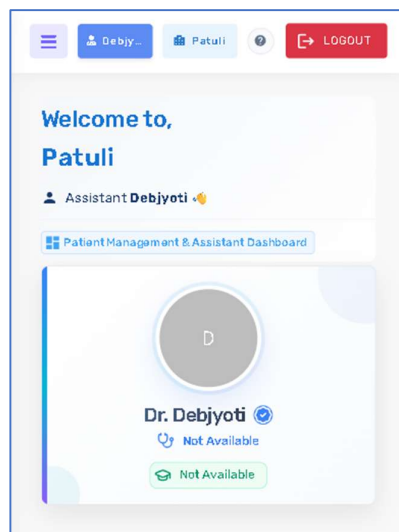


Assistant
Assistant access

Log in —

LOGIN

- Assistant account is linked to specific clinic locations
 - a. After login the Dashboard page appears, where you can see the doctor's name. The clinic name is displayed on the top

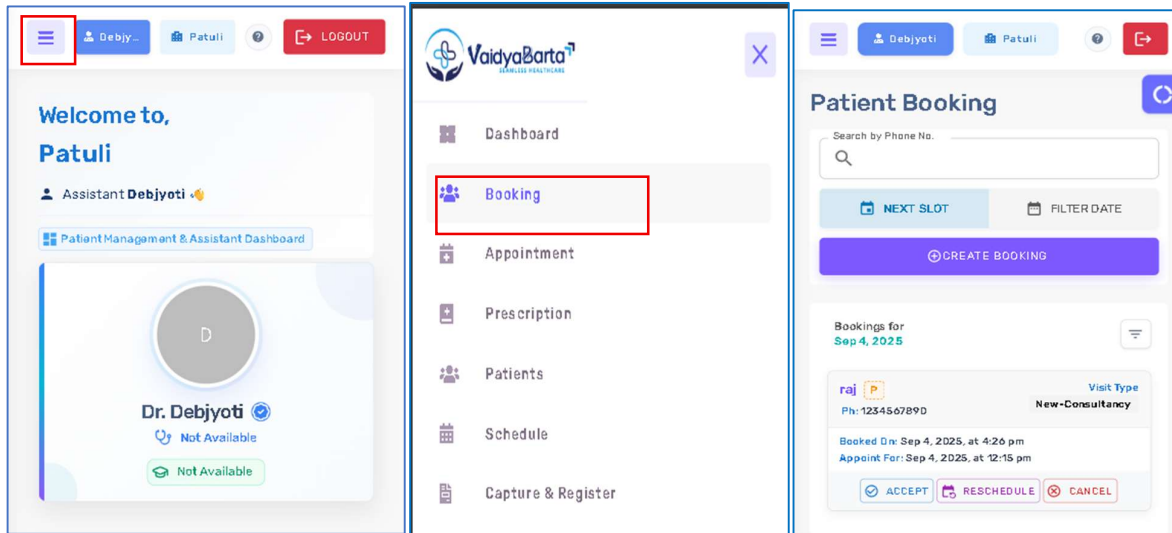


- Your access is limited to the clinics you are authorized to manage

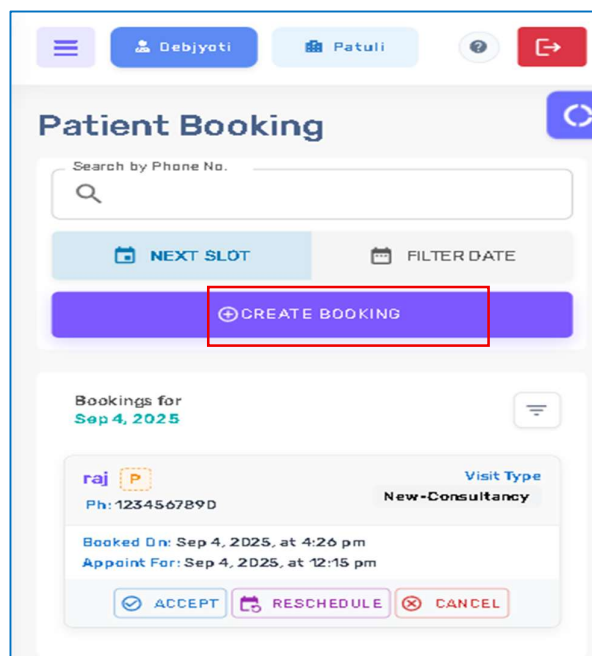
2. Booking Management

The booking section is where you'll handle all incoming appointment requests:

- **View Booking Requests:** See all incoming booking requests for available dates
 1. From the navigation bar on the left side of your screen, select **Booking** to open the patient booking screen.
 2. All Booking Requests can be viewed here.



- **Process New Patients:** Enter complete details for first-time visitors
 - a. In the same **Booking** section, click on the **Create Booking** button to add a Booking.



- b. For first-time visitors, click on the **New Booking** button.

The Patient Registry interface includes a search bar with a magnifying glass icon and a close button (X). Below the search bar is a 'New Booking' button with a plus icon. The search bar has two input fields: 'Search By' with a dropdown menu set to 'Phone' and a magnifying glass icon, and 'Phone Number' with a magnifying glass icon. Below the search bar is a button that says 'Use search to find specific patients'. The registry lists three patients: Debroopa (1026647890), Anish (7541023698), and Tanmoy (4520136987). Each patient entry has a plus icon to its right.

- c. Now, fill out the form with the required details and click on the **Submit** button.

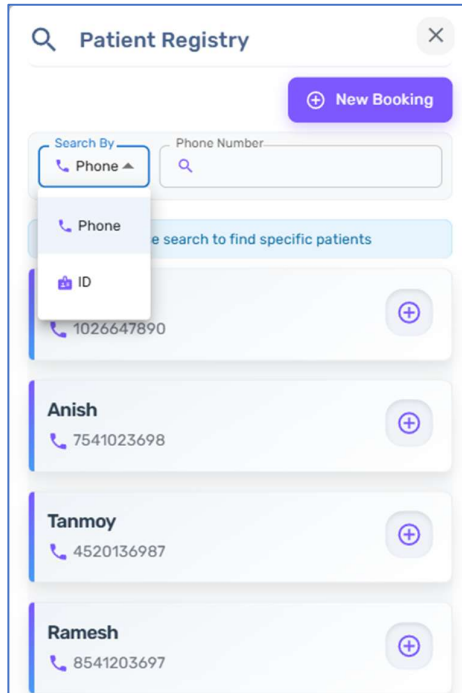
The 'Enter Patient Details' form includes the following fields: Name *, Mobile No. *, Date of Birth, Age (with Y and M dropdowns), Gender (dropdown), Whatsapp No., a checkbox for 'Same as mobile number', Address (Optional), and Pin... Each field has an information icon (i). To the right, the 'Date & Time' section has 'Date' and 'Time' input fields. Below these is a 'Purpose' section with four radio button options: 'New Consultancy' (selected), 'Follow Up', 'Report', and 'Emergency'. At the bottom right is a 'SUBMIT' button with a right arrow.

- **Search Returning Patients**


Find existing patients by: Phone number & Patient ID/Registration Number

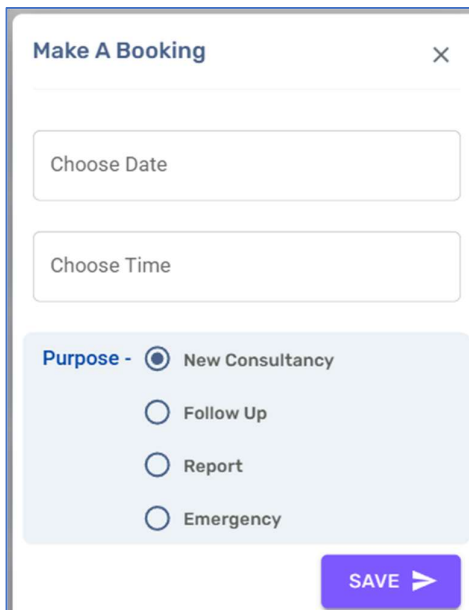
- a. In the **Booking** page, click on **Create Booking** button. The Patient Registry page opens.

- b. You can find the Existing patient by their Patient ID or Phone no.



The screenshot shows the 'Patient Registry' interface. At the top, there is a search bar with a magnifying glass icon and a close button (X). Below the search bar is a 'New Booking' button with a plus icon. The search bar has a 'Search By' dropdown menu with 'Phone' selected, and a 'Phone Number' input field. Below the search bar, there is a list of patients. Each patient entry includes a name, a phone number, and a plus icon in a circle. The patients listed are: Anish (7541023698), Tanmoy (4520136987), and Ramesh (8541203697). There is also a patient with phone number 1026647890. A tooltip is visible over the 'Search By' dropdown, showing 'Phone' and 'ID' options.

- a. Click on **Book** () button of the searched patient. Enter **Date**, **Time** and **Purpose** and **Save**. A booking record is created.



The screenshot shows the 'Make A Booking' form. It has a title bar with a close button (X). The form contains three input fields: 'Choose Date', 'Choose Time', and 'Purpose'. The 'Purpose' field has four radio button options: 'New Consultancy' (selected), 'Follow Up', 'Report', and 'Emergency'. At the bottom right, there is a 'SAVE' button with a right arrow icon.

Booking Actions


For each booking request, you can:

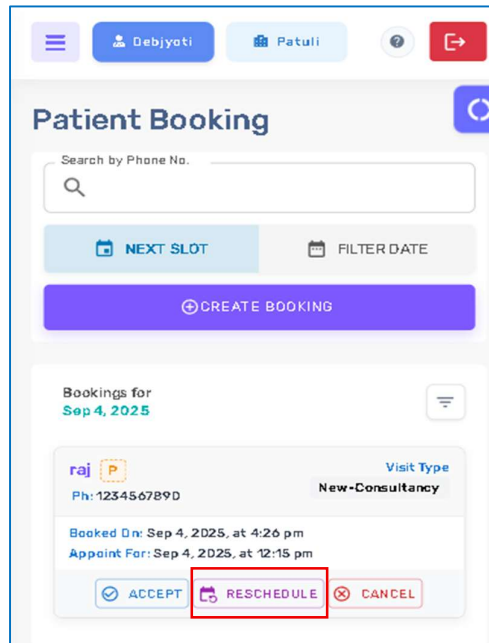
- **Confirm:** Accept the booking and assign a specific date and time
 - a. In the same **Booking Section**, where all the patients are listed, click on the **Accept** button.

The screenshot shows the 'Patient Booking' section of a web application. At the top, there are user avatars for 'Debjyoti' and 'Patuli', along with a search icon and a red button with a right arrow. Below this is a search bar labeled 'Search by Phone No.' with a magnifying glass icon. Under the search bar are two buttons: 'NEXT SLOT' and 'FILTER DATE'. A large purple button labeled 'CREATE BOOKING' is positioned below these. The main section is titled 'Bookings for Sep 4, 2025'. It displays a booking for a patient named 'raj' with a phone number 'Ph: 1234567890'. The booking details include 'Booked On: Sep 4, 2025, at 4:26 pm' and 'Appoint For: Sep 4, 2025, at 12:15 pm'. At the bottom of the booking card, there are three buttons: 'ACCEPT' (highlighted with a red box), 'RESCHEDULE', and 'CANCEL'.

- b. Select a time from the available slots and click **Accept** to finalize the booking.

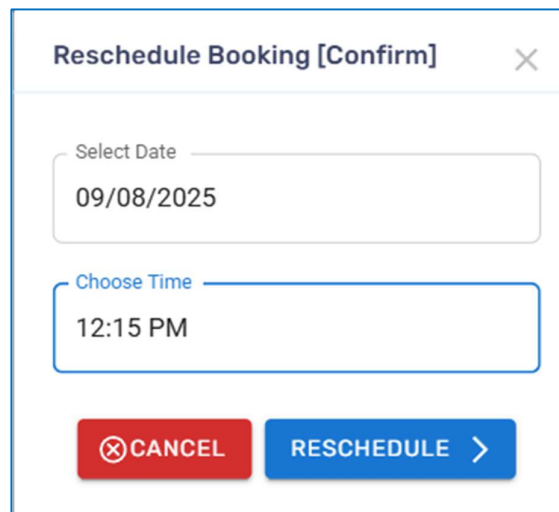
The screenshot shows a modal dialog titled 'Accept Booking' with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled 'Choose Time' with the value '12:00 PM'. Below the input field are two buttons: a red 'CANCEL' button and a blue 'ACCEPT' button with a right arrow.

- **Reschedule:** Suggest an alternative date and time
 - a. In the booking section, where all bookings are listed, click the  **RESCHEDULE** button to reschedule the booking




The screenshot shows the 'Patient Booking' interface. At the top, there's a search bar labeled 'Search by Phone No.' with a magnifying glass icon. Below it are buttons for 'NEXT SLOT' and 'FILTER DATE', and a prominent purple 'CREATE BOOKING' button. The main section displays 'Bookings for Sep 4, 2025'. A specific booking is shown for a patient named 'raj' with phone number '1234567890'. The booking details include 'Booked On: Sep 4, 2025, at 4:26 pm' and 'Appoint For: Sep 4, 2025, at 12:15 pm'. At the bottom of this booking card are three buttons: 'ACCEPT', 'RESCHEDULE' (highlighted with a red box), and 'CANCEL'.

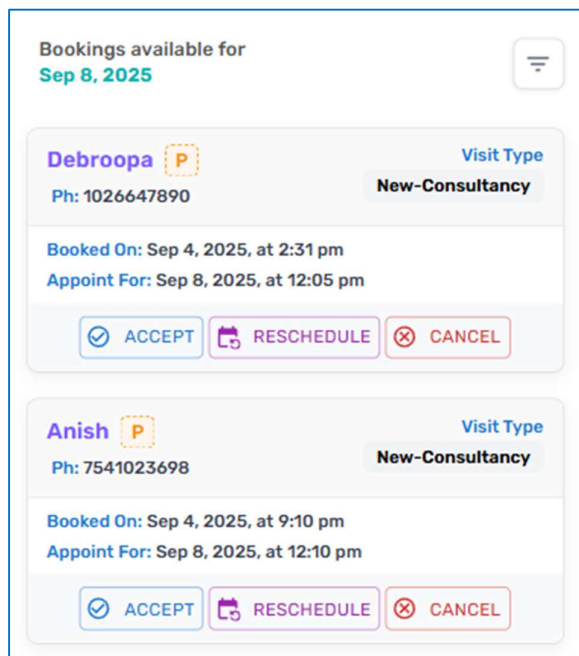
- b. Select a date from the available options, select a time from the available slots and click Reschedule to finalize the booking.




The screenshot shows a 'Reschedule Booking [Confirm]' dialog box. It has a close button (X) in the top right corner. Inside, there are two input fields: 'Select Date' with the value '09/08/2025' and 'Choose Time' with the value '12:15 PM'. At the bottom, there are two buttons: a red 'CANCEL' button and a blue 'RESCHEDULE' button with a right-pointing arrow.

- **Cancel:** Decline the booking with an optional reason



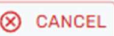
- In Booking page, click on the  button of the patient to cancel the booking for any reason.




Bookings available for
Sep 8, 2025


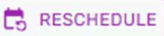
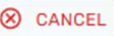
Debroopa  Visit Type
Ph: 1026647890 New-Consultancy

Booked On: Sep 4, 2025, at 2:31 pm
Appoint For: Sep 8, 2025, at 12:05 pm

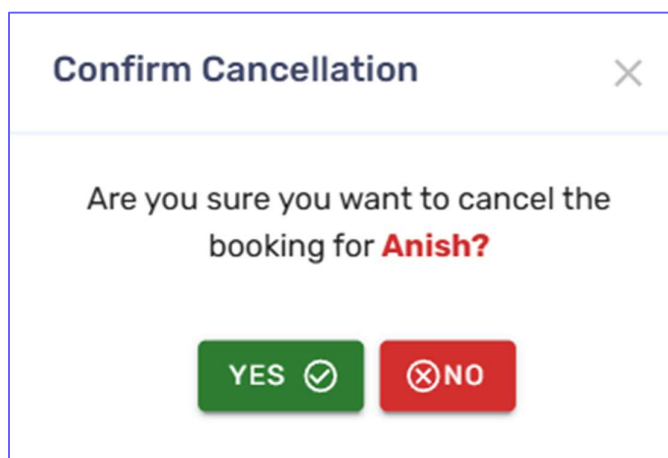
  


Anish  Visit Type
Ph: 7541023698 New-Consultancy

Booked On: Sep 4, 2025, at 9:10 pm
Appoint For: Sep 8, 2025, at 12:10 pm



  

- On the pop-up select **Yes** if you want to cancel the booking.



Confirm Cancellation 

Are you sure you want to cancel the
booking for **Anish**?

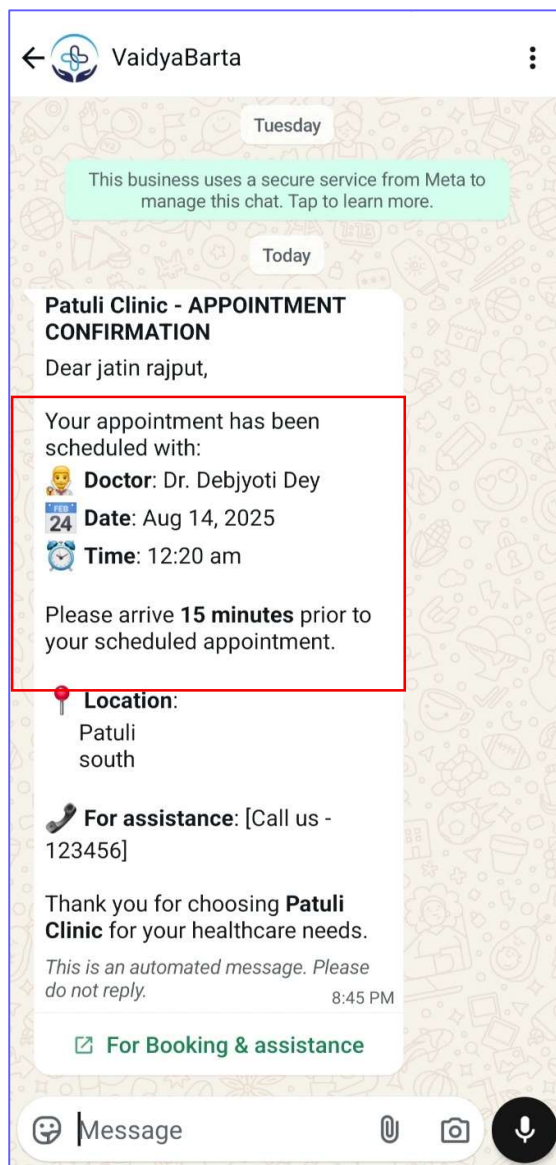
 

Important Note: When allocating appointment times, try to space appointments by at least 5-minute intervals. While the system allows scheduling multiple patients at the same time, this should be done thoughtfully to manage patient flow.

Confirmation Process

After taking action on a booking request:

1. The system automatically sends a WhatsApp notification to the patient with the status update



2. Confirmed appointments are moved to the Appointment section
3. Rescheduled appointments generate a new booking request

3. Appointment Management

The appointment section displays all confirmed bookings for any selected date.

- **Daily View (Next Slot):** See all appointments scheduled for a specific day

From the **Navigation Bar**, select the **Appointment**. Here, you can view all the appointments scheduled for that day.

- **Walk-in Entry:** Register patients who arrive without prior appointments
 - a. Now, click on the **"Create Appointment"** button to directly schedule a new appointment.

- b. Now, you can see a **New Appointment** button — click on it.

The screenshot shows a 'Patient Registry' window with a search bar at the top. Below the search bar is a purple button labeled 'New Appointment'. Underneath, there's a 'Search By' dropdown set to 'Phone' and a 'Phone Number' input field. A light blue button below the search fields says 'Use search to find specific patients'. The main area displays a list of three patients: Debroopa (1026647890), Anish (7541023698), and Tanmoy (4520136987). Each patient entry has a purple plus icon to its right.

- c. Now, this form will appear. Fill in the patient details, select the time and date, and click **Submit**.

This will create an appointment without any prior booking.

The screenshot shows two side-by-side form sections. The left section, titled 'Enter Patient Details', contains fields for Name *, Mobile No. *, Date of Birth, Age (with Y/M dropdown), Gender, Whatsapp No., a checkbox for 'Same as mobile number', Address (Optional), and Pin... Each field has an information icon. The right section, titled 'Date & Time :', has fields for Date and Time. Below these is a 'Purpose -' section with four radio button options: New Consultancy (selected), Follow Up, Report, and Emergency. A purple 'SUBMIT' button with a right arrow is at the bottom right.

Note: Direct Scheduling: Create confirmed appointments directly from this section

Extended Actions Menu

Access additional options for each appointment.

- **View Appointment Details**
 - a. To perform this, go to the Appointment section where all patients are listed, click on the **View** button from the menu.

The screenshot shows a mobile application interface for managing appointments. At the top is a purple button labeled 'CREATE APPOINTMENT'. Below it are two appointment cards. The first card is for 'Lalit' with phone number '6521034987', scheduled for 'Aug 18, 2025' at '2:00 pm'. The visit type is 'Emergency' and the status is 'PENDING'. The second card is for 'Tanmoy' with phone number '4520136987', scheduled for 'Aug 25, 2025' at '1:15 pm'. The visit type is 'New-Consultancy' and the status is 'PENDING'. Both cards have three buttons at the bottom: 'VIEW' (with an eye icon), 'RESCHEDULE' (with a clock icon), and 'CANCEL' (with a red 'X' icon).

- b. You can view the appointment details of the patient, as shown below.

The screenshot shows a modal window titled 'Appointment Details' with a close button (X) in the top right corner. The modal contains the following information:

Patient Name :	Lalit
Registration No :	4WYC6XOD
Phone No. :	6521034987
Whatsapp No. :	
Address :	
Total Visits :	0

At the bottom right of the modal is a red button with a white 'X' icon and the text 'CANCEL'.

- **Reschedule:** Change appointment date and time
 - a. Click On Reschedule Button as Highlighted below

The screenshot shows a 'CREATE APPOINTMENT' interface. At the top is a purple button with a plus icon and the text 'CREATE APPOINTMENT'. Below this are two appointment cards. The first card is for 'Lalit' with phone number 'Ph: 6521034987'. It shows a date of 'Aug 18, 2025' and a time of '2:00 pm'. The 'Visit Type' is 'Emergency'. Below the card are three buttons: 'VIEW', 'RESCHEDULE', and 'CANCEL'. The second card is for 'Tanmoy' with phone number 'Ph: 4520136987'. It shows a date of 'Aug 25, 2025' and a time of '1:15 pm'. The 'Visit Type' is 'New-Consultancy'. Below this card, the 'RESCHEDULE' button is highlighted with a red rectangular box.

- b. A pop-up will appear. Select the date and the appropriate time for the next day's appointment. Then click 'RESCHEDULE' Button

The screenshot shows a 'Reschedule Appointment' pop-up window. It has a title bar with a close button (X). The main content area says 'Reschedule the appointment for Tanmoy'. Below this are two input fields: 'Select Date' and 'Choose Time'. At the bottom, there are two buttons: a red 'CANCEL' button with a close icon and a blue 'RESCHEDULE' button with a right arrow icon.

- **Cancel:** Remove the appointment
 - a. In the Appointment section click on **Cancel** if you want to cancel the appointment.

CREATE APPOINTMENT

Lalit
Ph: 6521034987
Date: Aug 18, 2025
Time: 2:00 pm
Visit Type: **Emergency**
PENDING
VIEW RESCHEDULE CANCEL

Tanmoy
Ph: 4520136987
Date: Aug 25, 2025
Time: 1:15 pm
Visit Type: **New-Consultancy**
PENDING
VIEW RESCHEDULE **CANCEL**

b. Then, a pop-up will appear. Choose the appropriate option as per your requirement.

Confirm Cancellation ✕

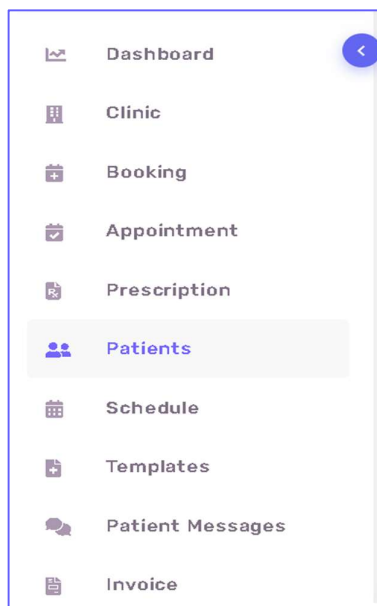
Are you sure you want to cancel the appointment for **Tanmoy**?

YES ✓ **NO** ✕

4. Patient Management

Maintain accurate patient records through the Patient section:

- **Edit Details:** Update patient information such as:
 - Name
 - Age
 - Address
 - Phone/WhatsApp number
- a. From the navigation bar, click on the “Patients” section to be redirected to the patient edit page.




- b. You can see all the registered patients here and click on the Patients name to see the patient's details

Edit Patient

View, Update, and Manage detailed patient profiles and personal data.

Phone No. ▼

 Enter phone number

Showing 5 recent patients. Use search to find specific patients.

D

Debroopa



1 VISIT

PATIENT ID	PHONE NUMBER
IOZXVAEK	1026647890
ADDRESS	
Not specified	

- c. You can edit patient details and save using the **EDIT PATIENT** button.

View Patient Details

Patient ID :	I0ZXVAEK
Patient Name :	Debroopa
Email :	N/A
Phone No. :	1026647890
Whatsapp No. :	N/A
Address :	N/A
Gender :	Female
Age :	24 Y
Total Visits :	1

* Note: Patient ID/Registration Number is permanent and cannot be changed after the first visit


* Access complete patient history across all clinics under your care

- **Search Functionality:** Find patients quickly by ID or phone number

Edit Patient

View, Update, and Manage detailed patient profiles and personal data.

Phone No. ▲

 Enter phone number

Phone No.

Patient ID.

patients. Use search to find specific patients.

Important Note: Once a patient completes their first visit, their Patient ID/Registration Number becomes permanent and cannot be changed. This ID is associated with the doctor and remains consistent across all clinic locations.

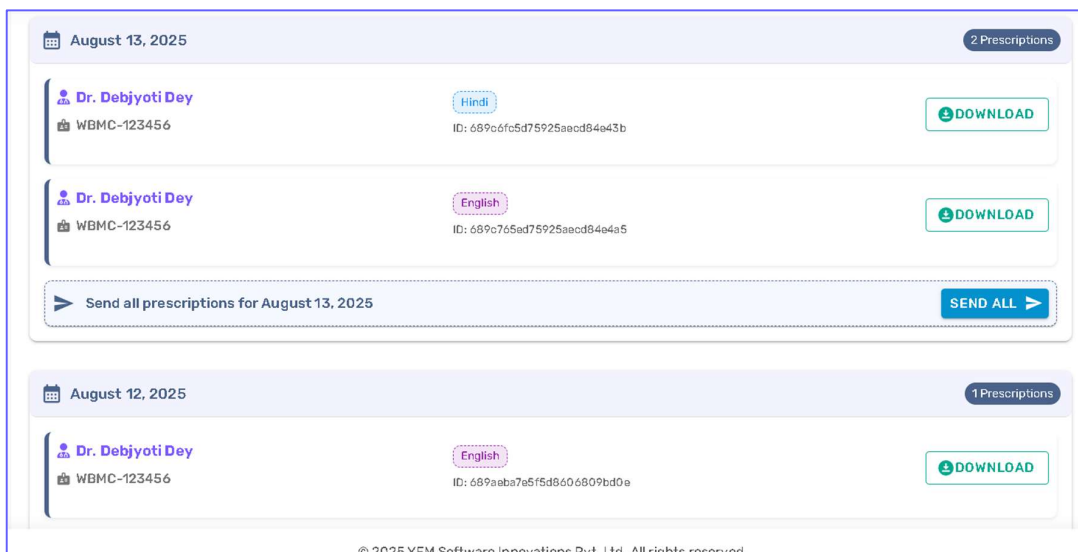
5. Prescription Access

Retrieve and manage prescriptions for patients:

- **Search by Patient:** Find all prescriptions for a specific patient using:
 - Phone number
 - Patient ID/Registration Number
 - a. Click on the “Prescription” section in the navigation bar.
 - b. You can search for prescriptions using either the phone number or the patient ID from the drop-down menu.

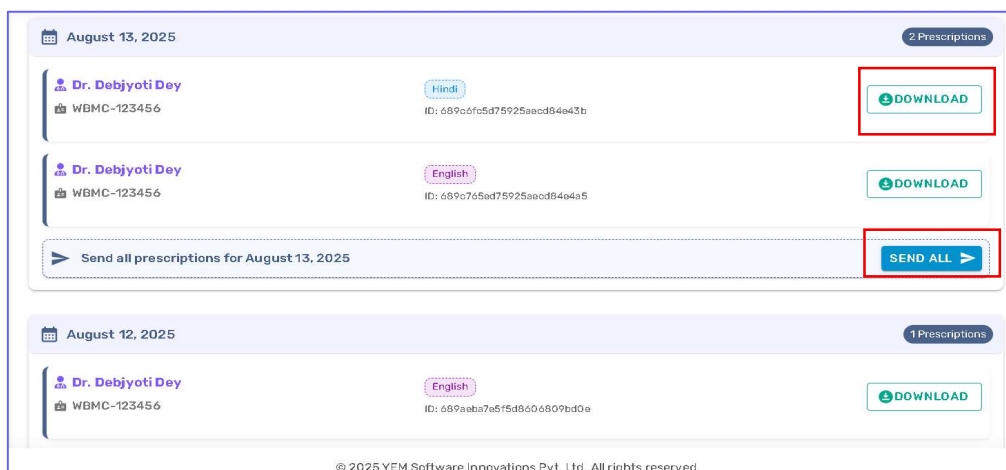
- **Chronological View:** See all prescriptions listed by date
 - a. After searching for a patient, click on the “View Prescription” button to see all prescriptions for that patient, sorted by date.

- b. On this page, you can see that all the prescriptions are arranged in proper order by date.



- **Distribution Options:**

- Download prescriptions as PDF files
- Share via WhatsApp directly from the platform



- Print physical copies for patients


Note: Unlike doctors, assistants cannot view the side-by-side treatment timeline comparison of multiple prescriptions.


6. Patient Visit Process

Your role during patient visits includes:


1. **Check-in:** Mark patients as arrived in the system
2. **Preparation:** Ensure patient details are up-to-date before the consultation
3. **Post-consultation:** Help patients receive their prescriptions via WhatsApp or print

New Appointment


 NEXT SLOT


 FILTER DATE

01-08-2025



18-09-2025



 CREATE APPOINTMENT

Appointments from Aug 1, 2025 to Sep 18, 2025

Tanmoy
Ph: 4520136987

COMPLETED

Date: Aug 18, 2025
Time: 1:20 pm

Visit Type
New-Consultancy

 PRESCRIPTION

Smart Features Highlights

1. **Automated Patient Notifications:** System automatically sends WhatsApp messages about booking status
2. **Intelligent Patient Search:** Quickly find returning patients to avoid duplicate entries
3. **Smart Appointment Spacing:** System recommends 5-minute intervals between appointments
4. **Multi-channel Prescription Delivery:** Share prescriptions via WhatsApp, email, or print
5. **Patient Record Unification:** Merge duplicate IDs to maintain continuous medical history
6. **Quick-access PDF Generation:** Instantly generate prescription PDFs for sharing

Best Practices

1. **Verify Patient Information:** Always confirm patient details are correct and up-to-date
2. **Check for Existing Records:** Search thoroughly before creating new patient entries
3. **Spacing Appointments:** Avoid scheduling multiple patients at identical times when possible
4. **Communication:** Keep patients informed about wait times and appointment status
5. **Organization:** Regularly review upcoming appointments to ensure proper preparation
6. **Document Sharing:** Confirm patients have received their prescriptions via WhatsApp

Workflow Optimization Tips

1. **Pre-session Preparation:** Review all appointments for the day before the clinic opens
2. **Patient Verification:** Ask returning patients for their ID number to ensure quick retrieval
3. **Walk-in Management:** Create a streamlined process for unexpected visits
4. **Documentation:** Keep notes on special cases or patient preferences in the system
5. **Follow-up Coordination:** Help manage prescription sharing for patients who need assistance

Troubleshooting Common Issues

1. **Patient Cannot Find Booking Link:** Direct them to booking.vaidyabarta.com
2. **Multiple Patient Records:** Use the merge function to consolidate duplicate entries
3. **WhatsApp Delivery Failure:** Verify the phone number and try sending again
4. **Schedule Conflicts:** Use the reschedule function to resolve appointment overlaps

This comprehensive digital platform streamlines clinic operations and enhances patient experience. Your role as a Clinic Assistant is vital in maintaining the efficiency of this system and supporting both doctors and patients throughout the healthcare journey.