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

Introduction

Welcome to your AI-assisted digital outpatient clinic management and electronic medical record (EMR) generation platform. This comprehensive system is designed to streamline your clinical workflow, enhance patient care, and provide a seamless experience for both you and your patients. This guide details all available functionalities and provides step-by-step instructions for optimal use.

Key Features Overview

- **Dashboard Analytics**: View comprehensive metrics on patient visits and appointments

- **Clinic Management**: Add, modify, or delete clinic details and assistant access credentials

- **AI-Assisted Prescription Generation**: Voice-to-text technology for efficient smart prescription creation.

- **Multi-lingual Prescription Support**: Automatic translation into 22 Indian languages

- **Auto Complete:** If you need to type / correct anything, just type 2 / 3 letters, it will provide all possible options (like Chief Complaints/ Symptoms, Medical Diagnosis/ Disease name etc) to select. No need to type all.

- **Smart Appointment Management**: Streamlined booking and scheduling system

- **Intelligent Patient Records**: Unified patient history and treatment timeline

- **Medication Intelligence**: Price comparison and salt composition information, along with different brand name of same medicine and price from top Indian Pharmaceutical companies. This is available instantly on prescription pad page.
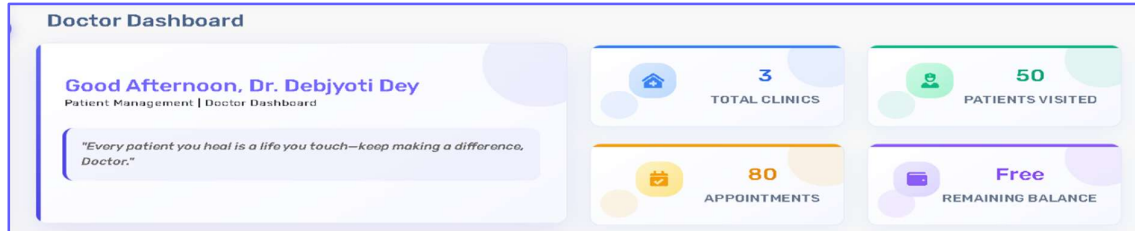
Contents

Detailed Functionality Guide

1. Dashboard

The dashboard provides a comprehensive overview of your practice analytics:
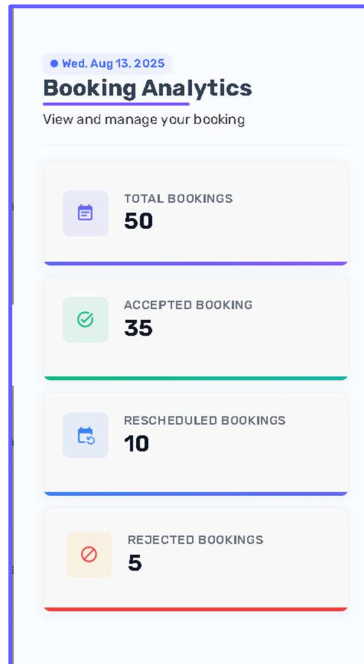
- **Patient Visit Analytics**: Track total patients visited across all clinics or specific locations

- **Appointment Forecasting**: View upcoming appointments and their status

- **Historical Data Analysis**: Access historical data of patient visits by clinic location

- **Performance Metrics**: Monitor key performance indicators for your practice

The dashboard is your command centre for making data-driven decisions about your practice and patient care.

2. Clinic Management

The Clinic section allows you to:

- **Add/Modify Clinic Details**: Update information about your clinic locations

    a. From the navigation bar, select the 'Clinic' section
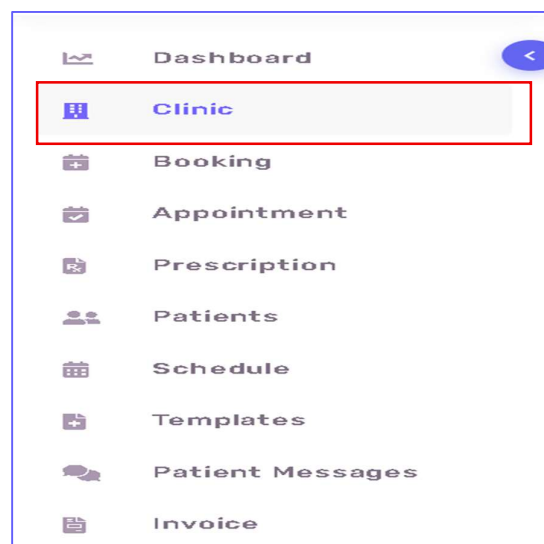
b. On the **Clinic** page, click on the **Add Clinic & Assistants** button located at the top-right corner to onboard your new clinic

c. Fill in the **Onboarding Form** with the correct clinic and assistant details, then click the **Submit** button.

d. Here, you can see the list of clinics. To make changes, click on the 'Edit' button in the 'Actions' column for the respective clinic.

CLINIC NAME	CLINIC CODE	ASSISTANT	LOCATION	CONTACT	STATUS	SELECTION	ACTIONS
clinic	cli7890	demow	Kolkata	1234567890	Active	Current	✏️ 🗑️
Demo Clinic	Dem7890	Sufol Kundu	Kolkata	1234567890	Inactive	Set Active	✏️ 🗑️

e. You can now edit the clinic location and other details as needed. Once the updates are made, click the 'Update' button to save the changes.

Edit Existing Assistant ✕

Edit Clinic Details :

Clinic Name *
Demo Clinic

City/Address *
5 Number Bus Stand, Garia

District *
Kolkata

PIN Code *
12345

Clinic HelpLine No. *
1234567890

Edit Assistant Details :

Full Name *
Sufol Kundu

Mobile No. *
1234567890

Whatsapp No. *
1234567890

Email Id
demo@gmail.com

☐ Change Password

◁ UPDATE

- After clicking the 'Update' button, you can see that the location has been changed.

CLINIC NAME	CLINIC CODE	ASSISTANT	LOCATION	CONTACT	STATUS	SELECTION	ACTIONS
clinic	cli7890	demow	Kolkata	1234567890	Inactive	Set Active	✏️ 🗑️
Demo Clinic	Dem7890	Sufol Kundu	5 Number Bus Stan…	1234567890	Active	Current	✏️ 🗑️

- **Manage Assistant Access**: Create or modify clinic access credentials for your assistants

    a. In this section, you can update the assistant details and also change the password within the same Clinic section.
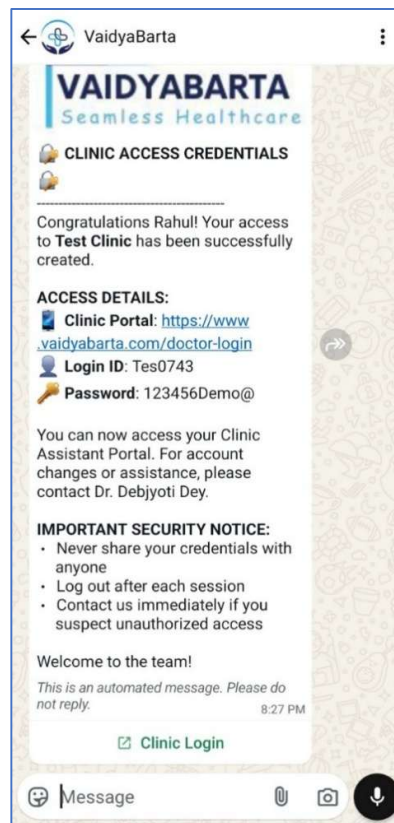
- **Status Notifications**: Automated WhatsApp notifications to Clinic Assistant about clinic access and credentials.

  - Assistants will receive this type of WhatsApp notification on their registered number, containing the Clinic Access Portal link and their login credentials.

Important Note: Clinic Information will be printed on your prescription header. Modify clinic details as you like it to be printed on your digital prescription.

3. Booking Management

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

Booking request for doctor's appointment can be made by patient using patient facing application https://booking.vaidyabarta.com/ this is a mobile only responsive application. As it's expected that wider population of patient will be sending booking request from mobile devices only.

Clinic Assistant and Doctor can enter booking details from this section also.

- **View Booking Requests**: See all incoming booking requests for available dates

  a. From the navigation bar, select the 'Booking' section

  b. Here, you can view all the patients details who have booked appointments, using both the **Next Slot** option and the **Filter by Date** feature.

- **Process New Patients**: Enter complete details for first-time visitors

    a. Click on 'Create Booking'. It will open the Search patient registry form.

    b. To add a new patient, click on the 'New Booking' button.

Fill in all the required patient details and click on the **Submit** button.

c. A Booking record will be created with the entered details as displayed in the image below for your reference.

- **Search Returning Patients**: Find existing patients by:

  o Phone number

  o Patient ID/Registration Number

When a patient is found in the system, their information will be automatically populated to save time and ensure accuracy.

a. Click on 'Create Booking' button.

b. For repeat patients you can search and find all existing patient details using their phone number or patient ID. Click on "Book" button the searched patient.

c. Enter Date and Time, chose Purpose and **Save**. A booking record will be created for patient.

Booking Actions

For each booking request, you (Doctor / Clinic Assistant) can:

- **Confirm**: Accept the booking and assign a specific date and time for visit.

a. In the booking section, where all bookings are listed, click the ✓ (**Accept**) icon in the **Actions** column to confirm the booking.

b. Chose time and **ACCEPT** to finalize the booking**.**

c. When the time is accepted, the status will be updated to **Accepted**, and it will also appear in the **Appointment** section for further processing.

- **Reschedule**: Suggest an alternative date and time

a. In the booking section, where all bookings are listed, click the 📅 (**Reschedule**) icon on the **Actions** column to reschedule the booking.

b. Select **Date**, **Time** and click on **Reschedule** to finalize the booking.

d. In the booking section, click on **Filter by Date**, then select the **From** and **To** dates matching the ones you previously selected during rescheduling, to check the status of the patient.

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

    a. In the Actions column of the booking section, click on 🗑 (**Cancel**) icon to cancel the booking for any reason.

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

   c. You can see "Rejected" in the Status column of the Booking section for that patient

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
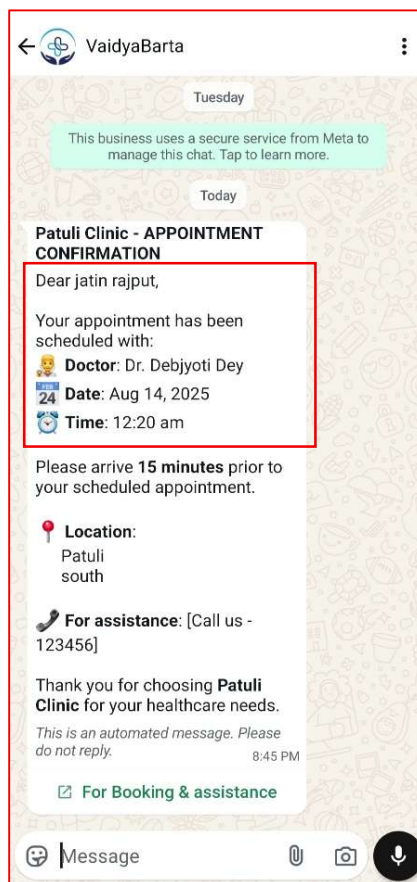
2. Confirmed appointments are moved to the Appointment section

    a. Previously we accept a patient named "arun"

ID	BOOKED ON	APPOINTMEN… ↑	NAME	PHONE	PURPOSE	STATUS	ACTIONS
1	August 13, 2025 ● 12:44 am	Aug 13, 2025 ● 12:05 am	a arun	7980040743	New-Consultancy	Accepted	✓✓ 📅 🗑

b. In the Appointment section, you will notice that the same patient has been added automatically, confirming that the booking has been successfully moved from the Booking section.

DATE	TIME	NAME	VISIT	PHONE	PURPOSE	STATUS	ACTION
August 13, 2025	12:05 am	a arun NEW PATIENT	0	7980040743	New-Consultancy	⌛ Pending	VISIT › ⋯

3. Rescheduled appointments generate a new Confirmed Appointment request.

Search by Name or Phone No. | NEXT SLOT | 12-08-2025 | 13-08-2025 | ⊕ CREATE BOOKING

Bookings from August 12, 2025 to August 13, 2025   ≡ All Status ⌄

ID	BOOKED ON	APPOINTMENT FOR	NAME	PHONE	PURPOSE	STATUS	ACTIONS
1	August 12, 2025 ● 5:12 pm	Aug 12, 2025 ● 12:10 am	a arun	5486972013	New-Consultancy	Accepted	✓✓ 📅 🗑
2	August 12, 2025 ● 7:21 pm	Aug 12, 2025 ● 12:05 am	r raj	1579524695	New-Consultancy	Accepted	✓✓ 📅 🗑
3	August 12, 2025 ● 8:17 pm	Aug 13, 2025 ● 12:10 am	a avishak	7980040743	New-Consultancy	Rescheduled	✓✓ 📅 🗑

Rows per page: 5 ⌄   1–3 of 3 ‹ ›

4. Appointment Management

The appointment section displays all confirmed bookings for any given date, allowing you to:

- **Schedule Direct Appointments**: Create confirmed appointments directly

  a. Click on **Appointment** from navigation bar
  b. Now, click on the **"Create Appointment"** button to directly schedule a new appointment.

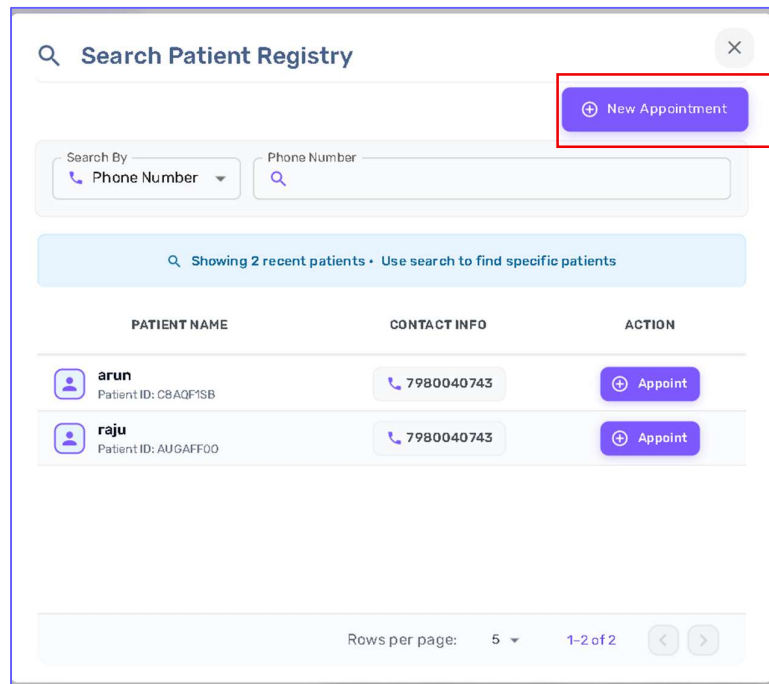**Appointments For : Kamalgazi Clinic** ⓘ

Search By Name or Phone No. | NEXT SLOT | dd-mm-yyyy | dd-mm-yyyy | ⊕ CREATE APPOINTMENT
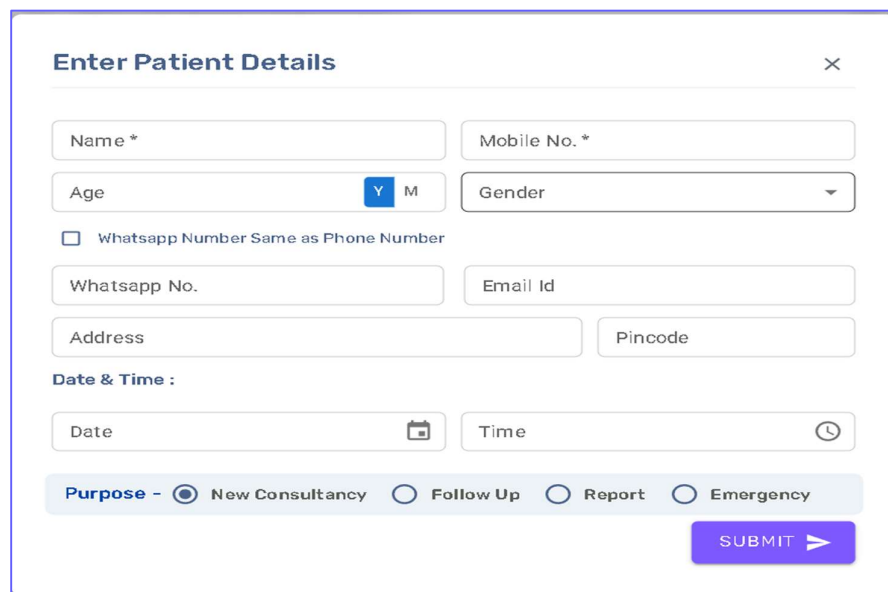
Appointments from Not Available

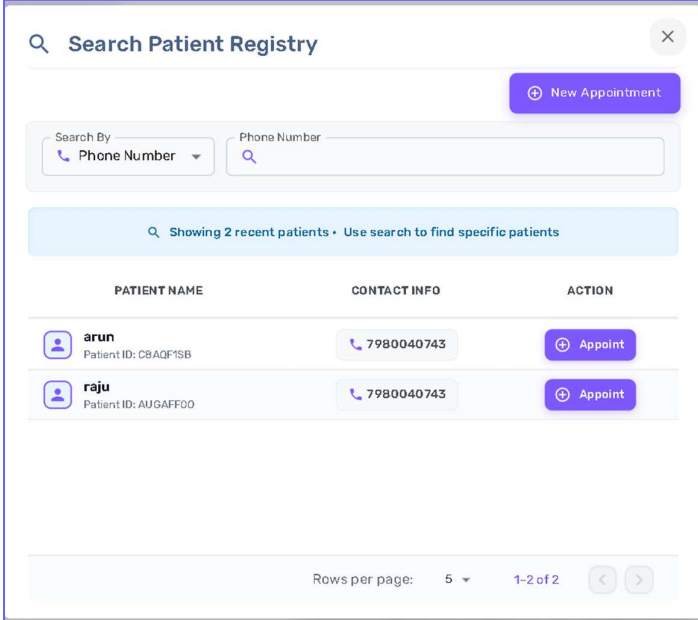c. Click **New Appointment** button on the Search Patient registry form. Enter Patient Details form opens.

d. Fill in the patient details, select the time and date, and click **Submit**. This will create an appointment without any prior booking.

- **Accommodate Walk-ins**: Enter details for patients without prior bookings

a. In the Appointment section, when you click on **Create Appointment**, you will see a **New Appointment** button. Click on it.
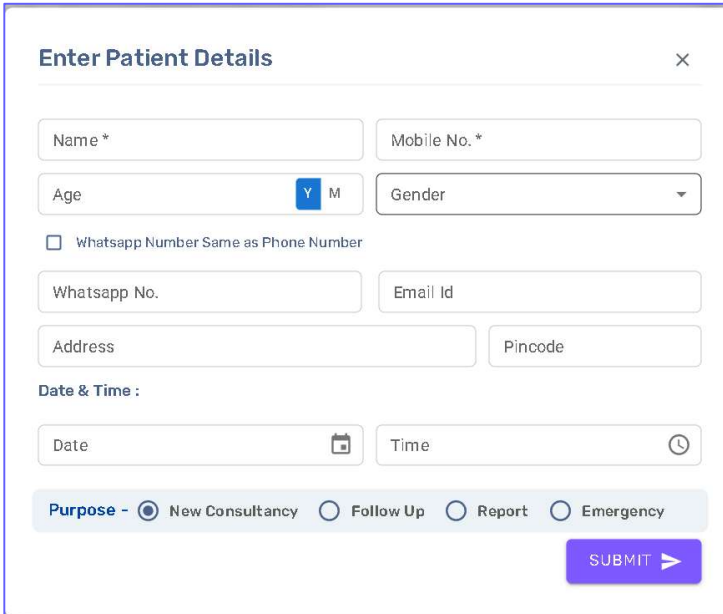
b. Now, fill out this patient form with the proper details of the walk-in patient and click the **Submit** button. This will create an appointment directly for the walk-in patient, and it will automatically appear in the list where all patients are displayed.

- **Manage Appointment Records**: Access the extended options menu (three dots) to:

  o **Edit Appointment** details if needed.

- To perform this, go to the Appointment section where all patients are listed, click on the three-dot menu, and then select the **Edit** (✏ Edit) button from the menu.

a. In the next form update the patient's details and click on the **Save Changes** button. This will update the appointment record.
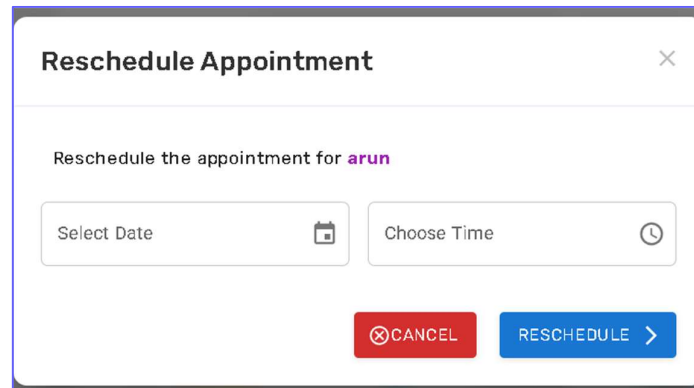
○ **Reschedule** a confirmed appointment

a. Click On Reschedule (📅 Reschedule) button as Highlighted below

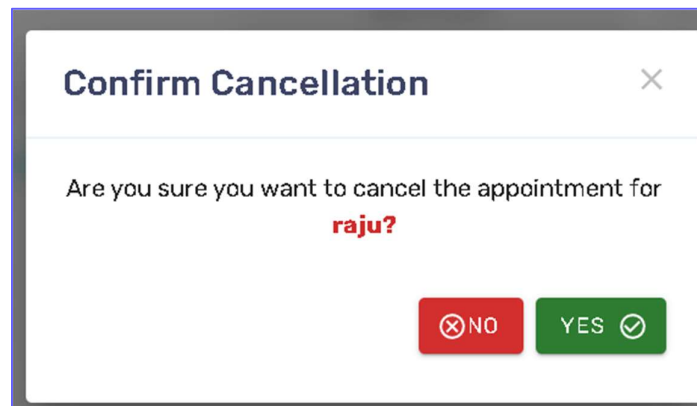b. Select the reschedule date and time in the next popup and click 'RESCHEDULE' Button

- o **Cancel** a confirmed appointment.

  a. In the Appointment section, under the **Actions** column, click on the three-dot menu and then select **Cancel** (⊗ Cancel) if you want to cancel the appointment.

  b. Then a pop-up will appear. Select YES.

- o **Merge** patient IDs

  a. To merge a patient, click on the three dots and then select the **Merge** (⋏ Merge) button.

DATE	TIME	NAME	VISIT	PHONE	PURPOSE	STATUS	ACTION
August 13, 2025	12:05 am	a arun NEW PATIENT	0	7980040743	New-Consultancy	⏳ Pending	VISIT › ⋯
August 15, 2025	12:00 am	r raju NEW PATIENT	0	7980040743	New-Consultancy	⏳ Pending	VISIT

> ⋏ Merge
> ✎ Edit
> 📅 Reschedule
> ⊗ Cancel

b. Select the patient that you want to merge with your currently selected patient.

Merge Patients
Find and merge this patient record into another existing patient profile   ✕

Current Patient
ⓘ This Patient Record will be merges into the selected patient record:

a **arun**   New patient
Patient ID: L58EMN3Y

⚧ **Gender:** Male

👤 **Age:** 52 Y

📞 **Phone:** 5486972013

🟢 **WhatsApp:** 5486972013

📍 **Address:** Pelican Residency, Ramchandrapur, Kamalgachhi More, Kolkata, West Bengal, India, 2c

Select Patient to Merge
ⓘ Search and choose the patient record you want to retain:

Ph... ▾   🔍 Search by phone number

🔍
Search for a patient
Enter Phone No. or Patient ID

⋏ MERGE PATIENTS

c. Now, click the "Merge Patients" button to merge the two patients.

Merge Patients
Review selected appointments before merging   ✕

Current Patient
ⓘ This Patient Record will be merges into the selected patient record:

a **arun** →   New patient
Patient ID: L58EMN3Y →

⚧ **Gender:** Male   →

👤 **Age:** 52 Y   →

📞 **Phone:** 5486972013   →

🟢 **WhatsApp:** 5486972013   →

📍 **Address:** Pelican Residency, Ramchandrapur, Kamalgachhi More, Kolkata, West Bengal, India, 2c   →

← Selected Patient   ↻ RESET
ⓘ Verify and swap the patient record you want to retain:

j **jatin**
New patient

🪪 **Patient ID:** 254XQ2ZI

⚧ **Gender:** Male   👤 **Age:** 85 Y

📞 **Phone:** 7980040743

🟢 **Whatsapp:** 7980040743

📍 **Address:** Pelican Residency, Ramchandrapur, Kamalgachhi More, Kolkata, West Bengal, India, 2c

⋏ MERGE PATIENTS

Patient ID Merging: This important feature allows you to consolidate patient records when a returning patient has been inadvertently assigned a new ID. By merging the new ID with their original registration number, you maintain a complete and continuous patient history.

5. Patient Consultation & Prescription Generation

The consultation workflow is streamlined for efficiency:

Starting a Consultation

- Click on Appointment from navigation bar.

- Select a patient from the appointment list and click "VISIT".

- The system will record consultation start time automatically.

- You can view patient details including visit count, new/returning status, contact information, and address on top bar.
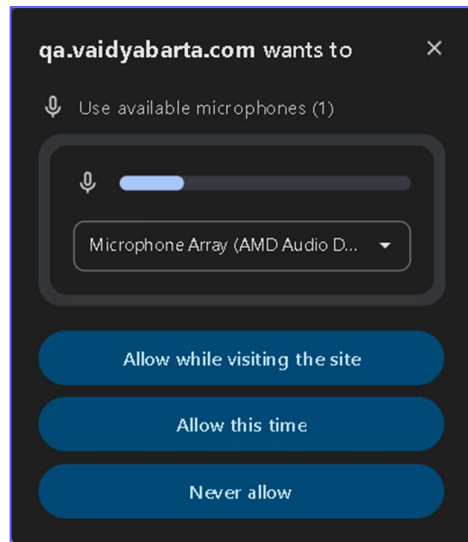

AI-Assisted Prescription Generation

1. After examining the patient, click "Start Recording"

   a. You can see the button at the bottom of your prescription page when you click on **Visit**.
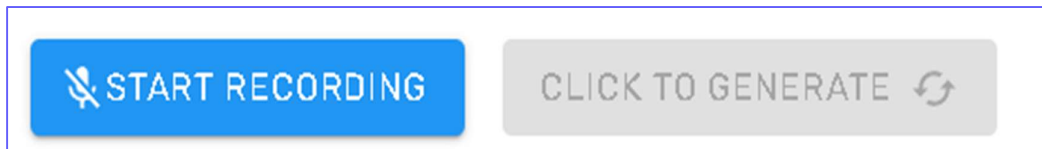
   b. When you click this button for the first time, you will need to grant microphone permission, as shown below.

c. After that, when you see the message "Ready! Please start speaking to record the prescription…", you can begin dictating your prescription.
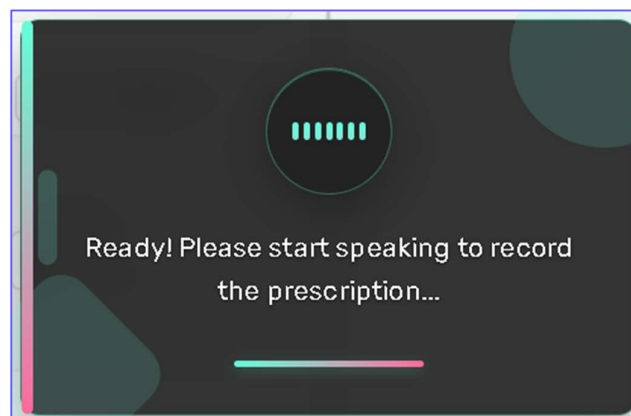
2. Dictate the following clinical details in English:

    o Chief complaints

    o Medical history

o   Physical examination/vitals

o   Medical diagnosis

o   Medication details with dosage instructions (e.g., "twice daily after food"). While providing the instruction provide as much information as possible.

o   Recommended tests/procedures

- o Lifestyle advice and recommendations

NOTE: You can omit any of this section while dictating. Section which you speak only will be generated in Prescription.

3. Click "Stop Recording" when dictation is complete. In the same place where you click the 'Start Recording' button, it will change to a 'Stop Recording' button. Once you are done, click this button to stop the recording.

4. Click "Generate" to create a formatted prescription automatically

Smart Medication Features

- • **Autocomplete**: Quick selection of medications as you type

- **Salt Composition**: Automatic display of active ingredients

- **Price Comparison**: View and compare prices across multiple brands

    a. First, select the medicine. Then, you will see a button labelled 'Compare'—click on it.

    b. Now, you will see a list of the same medicine with different prices from various manufacturers. Click the 'Select' button to choose your medicine.

- **Alternative Brands**: Select equivalent medications from different manufacturers based on the same salt composition

Previous Records Access

- View patient's past prescriptions and medical history

    a. On the Prescription Page, at the top right, there is a button labelled 'Past History'. Click on it.

b. When you click on that button, it displays all past prescriptions together.

- Instantly reload previous prescriptions to modify for follow-up visits/report if needed. This button is present at bottom left corner.

  a. First, click on the arrow button

a. Now, click the 'Proceed' button to populate the patient's previous prescription.

Finalization and Sharing

1. Click "Preview" to review the complete prescription

   a. When everything is set and you are ready to preview and finalize the prescription, click the 'Preview' button at the bottom right corner.

2. **Select a language from the multi-lingual dropdown to automatically translate the prescription into any of 22 Indian languages**

   a. On the Preview and Finalize page, at the top right corner, you will find a multi-lingual option with 22 Indian languages. Select the language as per your requirement.

b. Now you can see that this prescription has been converted into Hindi.

3. Categorize the visit as "Paid" or "Free" and assign patient priority (Regular, Requires Attention, High Priority)

4. Click "Save and Finalize" to complete the consultation. Clicking this button will calculate the total time taken to review a single patient. This will help to calculate average time taken to review a patient.

5. Share prescriptions via:

    o   WhatsApp (PDF in both English and selected regional language)

    o   Email

    o   Direct print option

6. Prescription Management

Access and manage all past and present prescriptions:

- **Search Functionality**: Find patient prescriptions by phone number or patient ID

  a. Click on the "Prescription" section in the navigation bar.
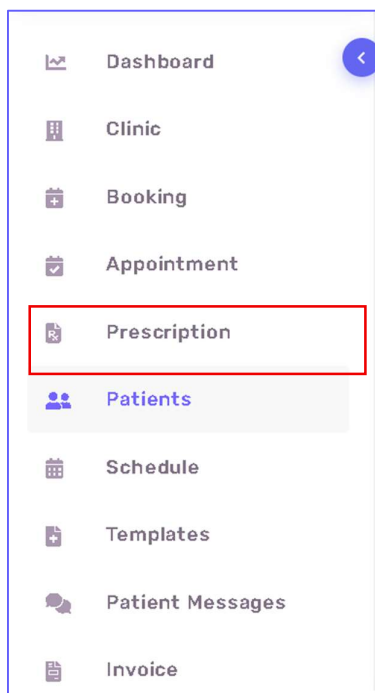
b. You can search for prescriptions using either the phone number or the patient ID from the drop-down menu.

- **Chronological Listing**: View all prescriptions for a patient sorted 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.

- **Document Handling**: View, download, or share prescriptions via WhatsApp

- **Treatment Timeline**: Compare up to three recent prescriptions side-by-side (doctor-only feature)

  a. Click on the "Combined Prescription" button located at the top-right corner.
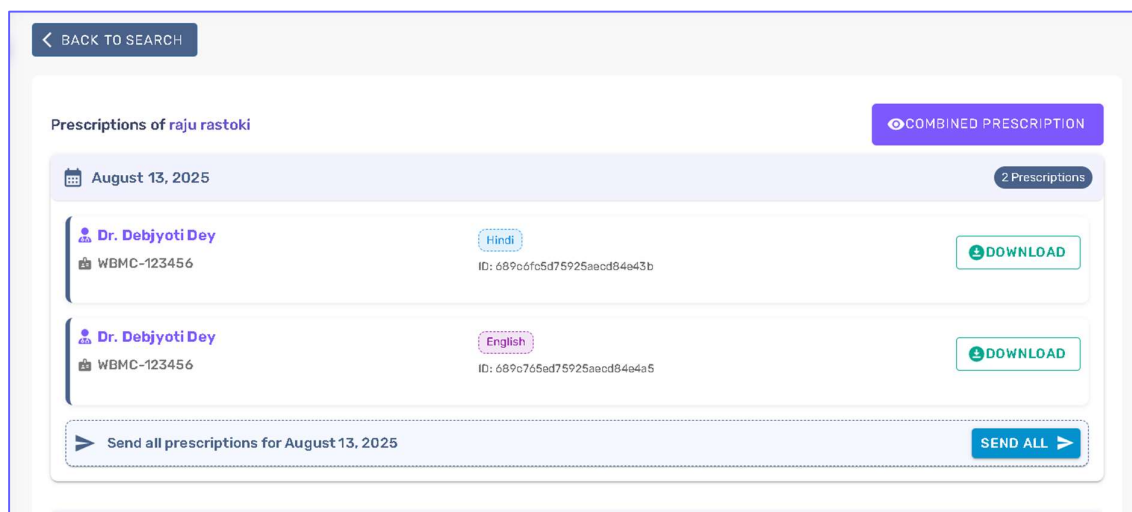
  b. Here, you can compare prescriptions side by side, with up to three prescriptions at a time.
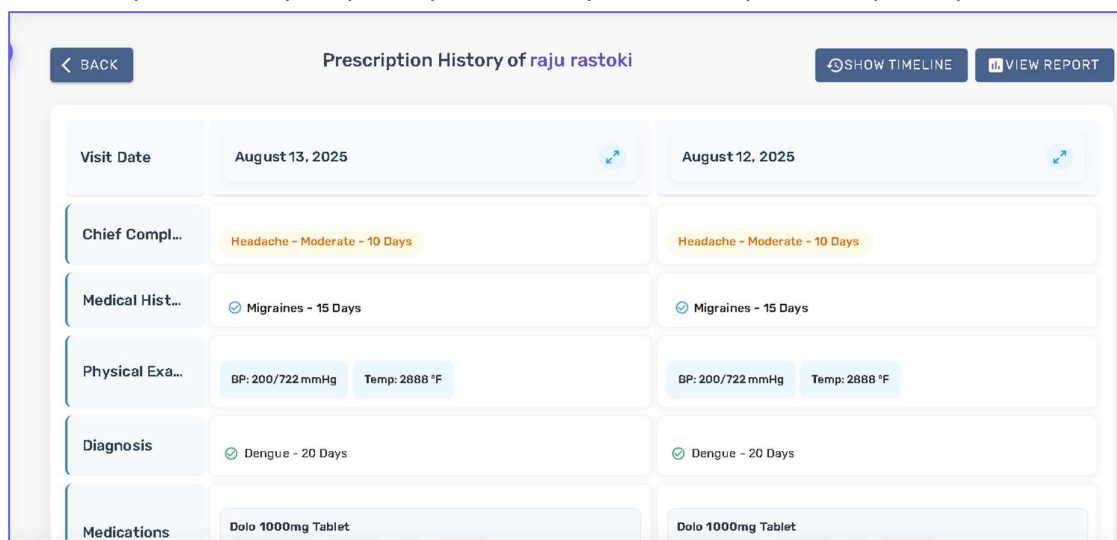
7. Patient Record Management

Maintain comprehensive patient records:
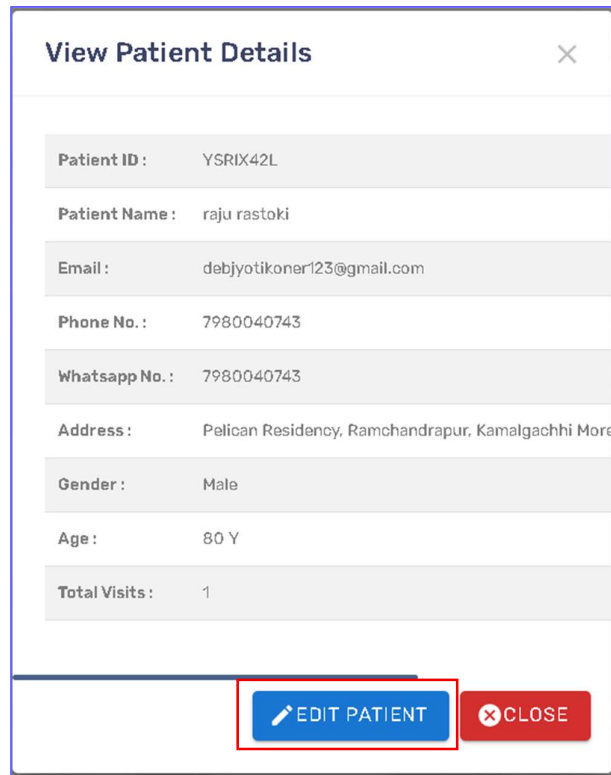
- Edit patient details such as name, age, address, and contact information

    a. From the navigation bar, click on the "Patients" section to be redirected to the patient edit page.
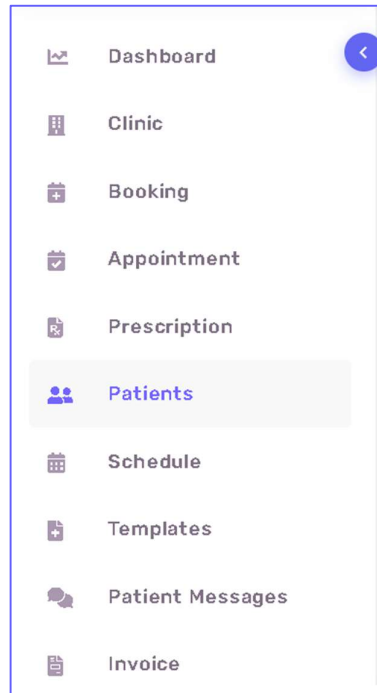
    b. You can see all the registered patients here and click on the view Button to see the patient's details
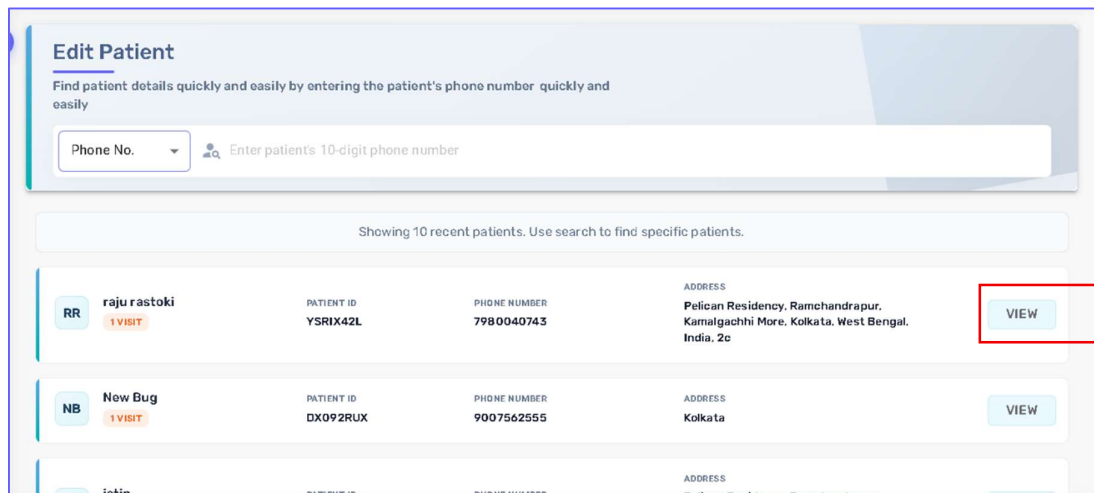
    c. Here you can see the edit patient button for update the patient's details
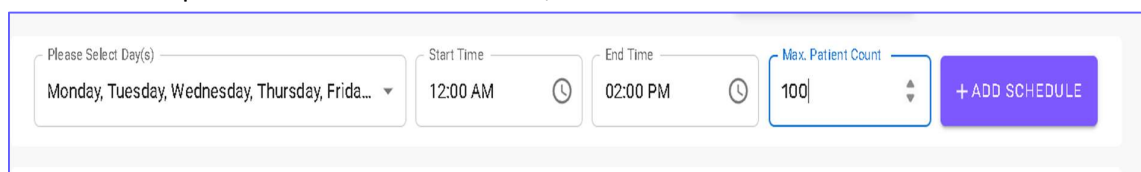
- Note: Patient ID/Registration Number is permanent and cannot be changed after the first visit

- Access complete patient history across all clinics under your care

8. Schedule Management

Optimize your availability across multiple clinics:

- **Weekly Schedule**: Set regular weekly availability patterns

- **Monthly Schedule**: Create custom schedules for specific months

- **Patient Capacity**: Define maximum patients per day/session

- **Time Allocation**: System assumes 5-minute increments per patient visit

a. From navigation bar click on schedule section
b. On the Scheduling page, select the date and time (from – to) from the drop-down menu, set the maximum patient count as shown below, and then click on the "Add Schedule" button.

c. Now, click on "Save Schedule" to add the doctor's schedule.

9. Template Management

Easily manage and customize your prescription documentation with **Individual Templates** and **Full Prescription Templates**. This feature helps doctors and clinic assistants save time and maintain accuracy while writing prescriptions.

a. From the navigation bar, click on the **Templates** section.
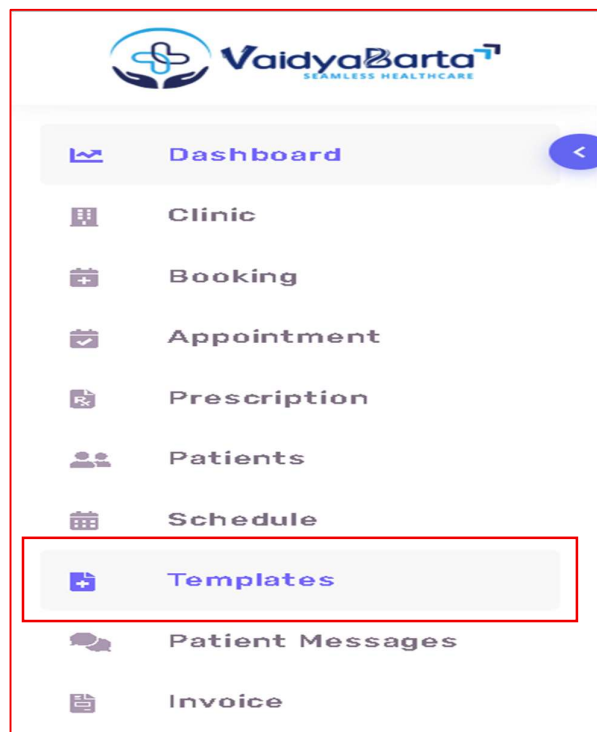
b. You will be redirected to the **Prescription Templates** page as shown below. Here, you will see two options:
- **Individual Templates** – Create or manage templates part-by-part such as Chief Complaints, Medical History, Diagnosis, Medications, etc
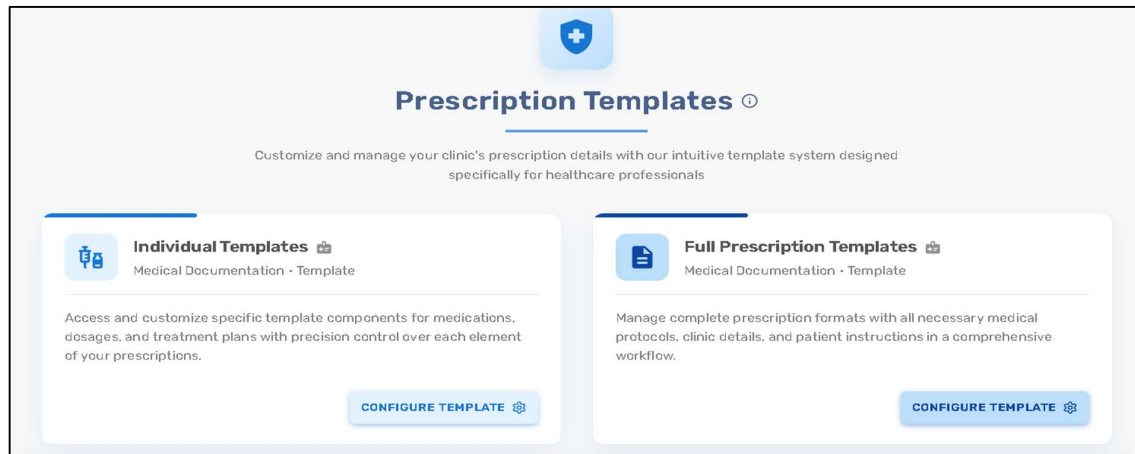
- **Full Prescription Templates** – Create complete prescription formats including all medical protocols, clinic details, and patient instructions

o **Creating a New Individual Template**
   a. Click on **Configure Template** under the **Individual Templates** section.
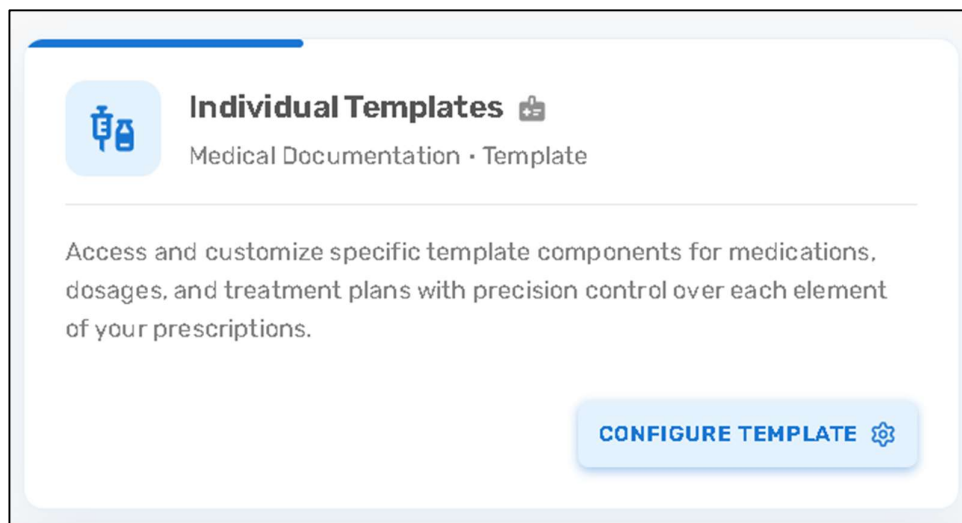
b. Click on the Create new template Button on Individual templates.
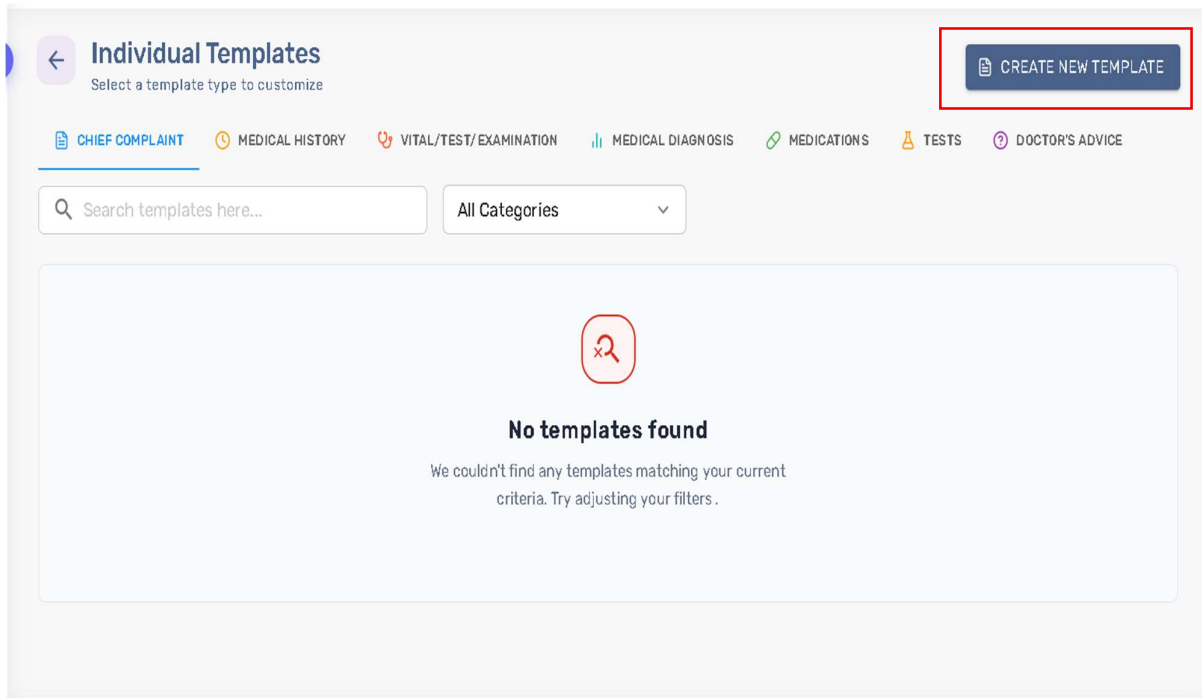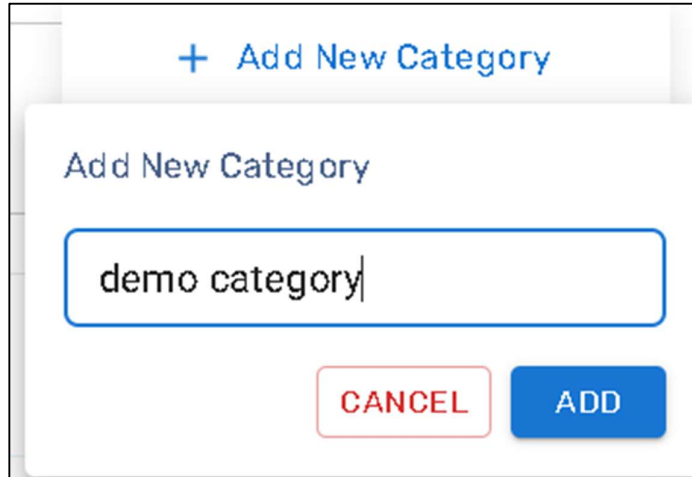
c. then Select the component you want to create (e.g., Chief Complaints, Medical History, Diagnosis, Advice, or Tests).
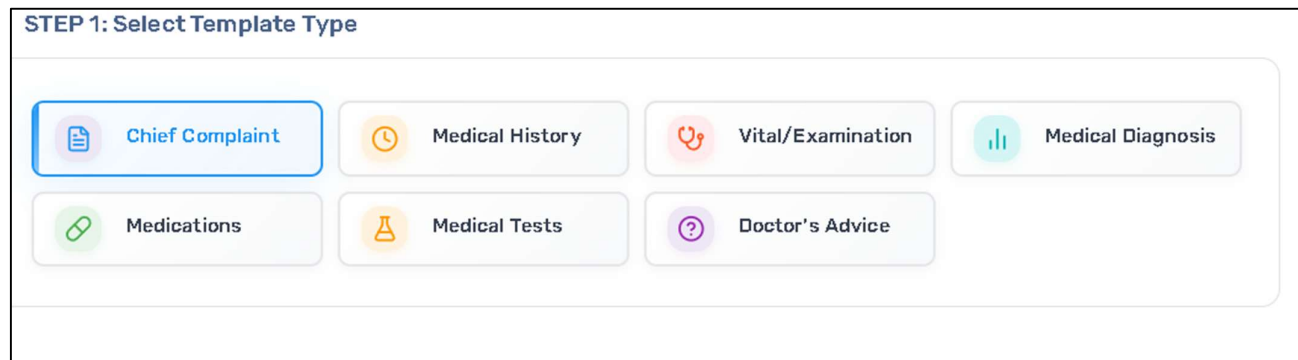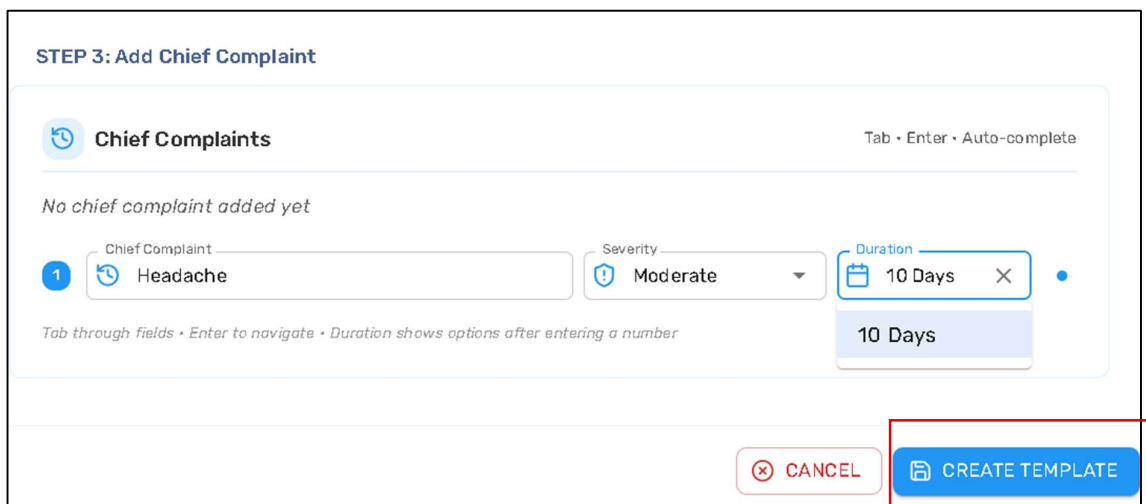
d. Then fill the template name description and select existing category or create a new category.

e. To add a new category, click on the "Add New Category" button. Enter the desired category name in the input field, and then click the "Add" button to save it.

f. To add a Chief Complaint, enter the complaint (e.g., "Headache") in the Chief Complaint field. Next, select the severity level (e.g., Mild, Moderate, Severe) from the dropdown menu. Finally, specify the duration (e.g., 10 Days) and save the details, then click on the Create Template Button to save the Template

Example: You can create a "Common Cold" template with Chief Complaint = Cough & Cold, Medical History = Allergic Rhinitis, Prescription = Paracetamol, etc.

o **Creating a Full Prescription Template**

    a. Click on Configure Template under the Full Prescription Templates section.
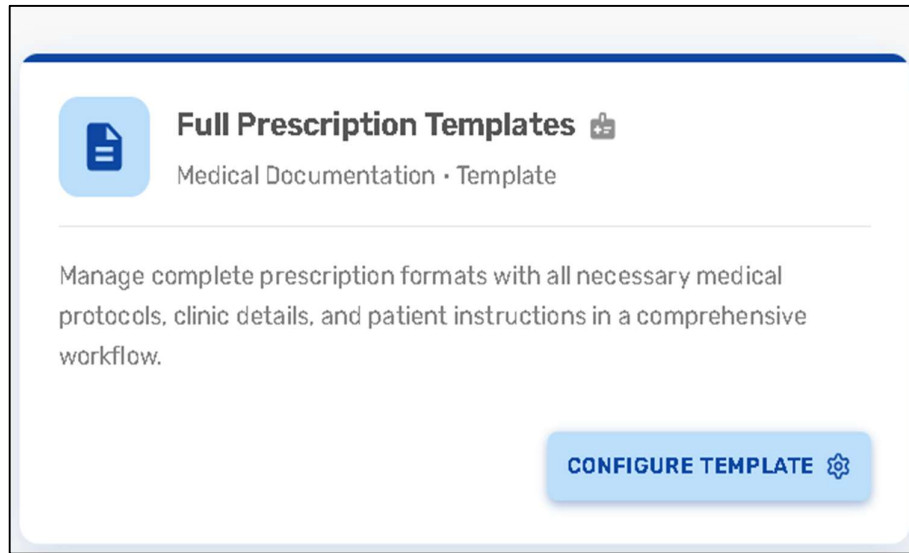
    b. Then click on the ADD NEW TEMPLATE Button
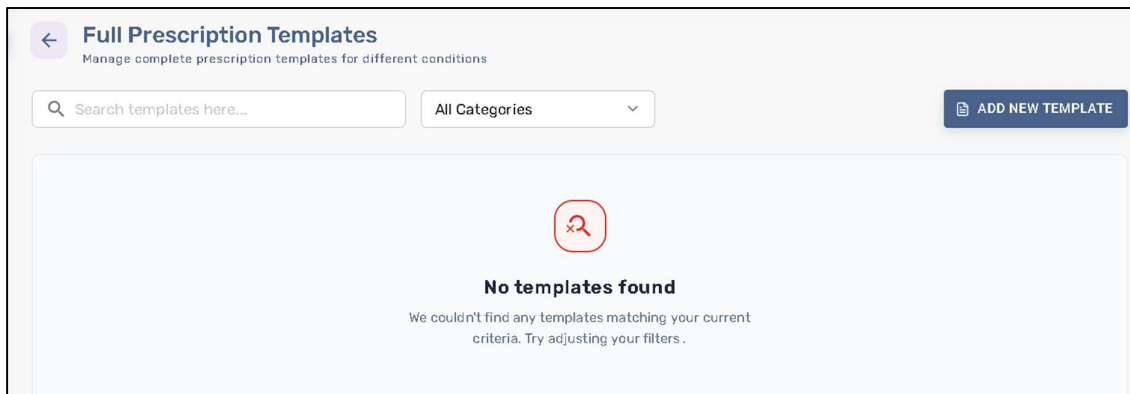
    c. Enter all necessary details for the complete prescription, including Chief Complaints, Medical History, Diagnosis, Treatment, Advice, and Follow-up Instructions and Save the full template for quick use in future cases.

Tip: **Full templates are best used when patients present with recurring or similar symptoms.**

- o **Using Templates While Writing Prescriptions**

  When you are creating a prescription:

  1. You can **directly insert an existing template** (Individual or Full).

  2. For Individual Templates, select the specific part you want to add.

3. For Full Templates, the entire prescription format will be auto-filled.

Tip: This saves time and ensures accuracy in cases where symptoms and treatments are repetitive.

✅ **Note: Templates can be created, edited, or deleted anytime, allowing flexibility for doctors and assistants to manage patient care efficiently.**

10. Patients Messages

Review and respond to patient queries review patients reports and chat with them directly for seamless communication.
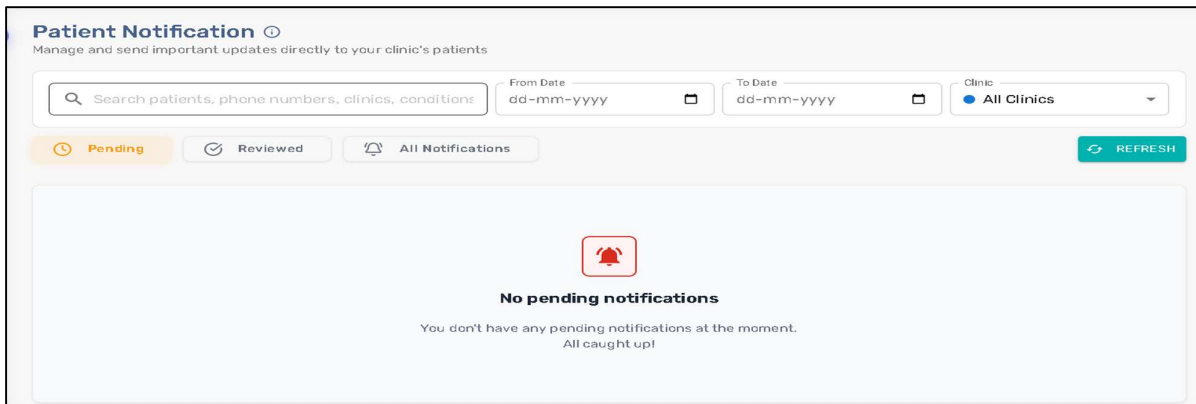
Here Patients Can Communicate or Send Patients Report to the Doctor for Review

Smart Features Highlights

1. **AI Voice Recognition for Prescription Generation**: Convert spoken clinical notes directly into formatted prescriptions

2. **Automated Multi-lingual Translation**: Instantly translate prescriptions into 22 Indian languages

3. **Medication Intelligence**: Compare prices and alternatives based on identical salt compositions

4. **Patient ID Unification**: Merge duplicate patient records to maintain continuous medical history

5. **Treatment Timeline View**: Compare multiple prescriptions side-by-side to track treatment progression

6. **WhatsApp Integration**: Share prescriptions instantly via WhatsApp in multiple languages

7. **Intelligent Scheduling**: Manage appointments across multiple clinics with customizable time slots

Best Practices

1. Always click "Visit" when the patient enters your consultation room to accurately track consultation duration

2. Use the voice recording feature for all sections of the prescription to maximize efficiency

3. Review generated prescriptions carefully before finalizing

4. Utilize the medication comparison feature to offer cost-effective options to patients

5. Maintain proper schedule settings to avoid overbooking

6. Regularly check the dashboard for practice insights and upcoming appointments

This AI-assisted platform is designed to enhance your clinical efficiency while improving the patient experience. By utilizing all features effectively, you can optimize your practice workflow and focus more time on patient care.