EHR REQUIREMENTS

I. Walkin Patients:

Workflow

Use case 1- Add Patient (New members)

Step 1: Add Patient

- Admin selects **“Add Patient”** option from the Admin Dashboard.
- Creates Patient ID by giving a username and password and basic demographic details and consent

- Full Name* (as per ID proof)
- Gender*
- Date of Birth / Age*
- Contact Number*
- Referring Doctor name and clinic name (if any)*
- Residential Address* (with PIN code)
- Emergency Contact* (Name, Relationship, Phone)

Generate UHID

- System automatically generates a Unique Health ID (UHID) only after successful completion of all mandatory fields.
- UHID becomes the **primary identifier** across EMR, Consultant Dashboard, Patient App, and Billing.

Step 2: Patient Directed to fill details (ADMIN, PATIENT)

The patient must be directed to fill their other demographic details and past medical records from the patient dashboard.
Note: Edit option to be given for the patients and Admin should also be allowed to add records.

Patient Demographics (Personal Information)

- Full Name* (as per ID proof)

- Photograph* (for patient record & ID verification)
- Gender*
- Date of Birth / Age*
- Contact Number* (mobile, alternate if possible)
- Email Address*
- Referring Doctor name and clinic(if any)
- Residential Address* (with PIN code)
- Emergency Contact* (Name, Relationship, Phone)
- Occupation & Employer (optional)
- Government ID Proof (Aadhaar, Passport, Driver's License, etc.)
- Insurance Details (provider, policy number, validity – if applicable)

Option to ADD Documents

Obtain Patient Consent (Tick box)

- Consent for:
  - Data collection & storage (per healthcare regulations)
  - Clinical treatment
  - Teleconsultation (if applicable)
  - Sharing data with referred specialists/insurance (if applicable)

USE CASE 2 – Patient Already Registered

Workflow

1. **Search Existing Patient** → Admin retrieves patient profile by:
   - UHID
   - Name
   - Mobile number

2. **Verify Patient Details** → Confirm patient identity via:
   - Name + UHID
   - Photograph
   - DOB / Age

3. Directs patient to fill details and past medical records

Case 3: **Book Appointment**

While booking:

- Admin selects **Department** → SMAART Balance / Eyes / Minds / Physio / General Medicine/ longevity-bmi.

- Based on department, **doctor roster** is filtered.

- Appointment is booked by entering patient UHID and selecting Department + Doctor + Time.
- Referral for diagnostics
- Blood parameters

USE CASE 3 – Nurse Pre-Consultation Workflow

Step 1: Patient Verification

- Nurse searches and confirms patient using Admin/Nurse Dashboard:
  - UHID
  - Name

Step 2: Record Vitals & Basic Information

Nurse captures:

Vital Signs

- Height
- Weight
- BMI (auto-calculated by system)
- Blood Pressure (systolic/diastolic)
- Heart Rate (Pulse)
- Respiratory Rate
- Temperature
- Oxygen Saturation (SpO_2)

Clinical Notes- Nurse (If not uploaded or updated by patients)

- Chief Complaint (reason for visit)
- Duration of Complaint
- Allergies (drug, food, environment)
- Current Medications (name + dosage)

- Any recent hospitalizations / emergency visits
- Past Medical History (chronic illnesses, surgeries, hospitalizations)
- Family Medical History (diabetes, hypertension, heart disease, cancer, etc.)
- Immunization Status (if relevant)
- Lifestyle Habits (smoking, alcohol, physical activity, diet)

Observations (Optional, Nurse's Notes)

- General appearance (alert, weak, in pain, etc.)
- Special remarks (e.g., "patient using wheelchair," "difficulty breathing")

Note: Option to Take Notes must be added.

Step 4: Update Patient File

- Data is saved against **UHID**
- Information is available for the **Doctor in real-time**.

Case 5 – Doctor Consultation & Prescription Pad

Workflow:

1. **Patient Selection**
    - Doctor logs into **Consultant Dashboard**.
    - Selects patient via **UHID / Name** from scheduled appointments or search.

2. **Auto-Display of Patient Record**
    - Patient **Name + UHID** appear on the **Prescription Pad header**.
    - Doctor can view consolidated **Clinical Records**:
        - Nurse-collected data (vitals, complaints, allergies, medications)
        - Past Medical History & Family History
        - Previous Consultations & Prescriptions

3. **Online Prescription Pad (Editable Form)**
    Doctor has structured fields to enter:

    Teleconsultation/In person

    - **Clinical Notes / Observations**
    - **Investigations / Lab Tests** (select from list or enter manually)

    - **Medications**

        - Medicine Name (from formulary / free text)
        - Dosage (mg/ml/unit)
        - Quantity
        - Frequency
        - Duration (days/weeks)

    - **Treatment Advice / Lifestyle Recommendations**

4. **Prescription Finalization**
    - Doctor can **Save Draft** or **Finalize Prescription**.
    -
    - Finalized prescription is:
        - Stored in **EMR** under patient's UHID.
        - Synced to **Patient App / Portal**.
        - Sent to **Pharmacy / Lab**
        - Available for **follow-up visits**.

Case 6 – Billing & Pharmacy

Workflow:

1. **Trigger Billing**
    - After doctor finalizes prescription, the system automatically generates a **Billing Draft** linked to the patient's **UHID**.

    - Admin/Front Office staff accesses the **Billing Module** from the Admin Dashboard.

2. **Invoice Structure**
    - **Header:**
        - Clinic Name & Logo
        - Patient Name, UHID, Age, Gender
        - Date & Invoice Number

    - **Invoice Body:**
        - **Consultation Fee** (doctor-specific, configurable per department)
        - **Medicines (from prescription):**

            - If medicine is available in Pharmacy stock → Auto-populate with price & quantity.

            - If medicine is not available → Show “NA” in price/availability column and can be removed.

        - **Other Charges** (if applicable: procedures, consumables, service charges).

    - **Footer:**
        - Subtotal
        - Taxes (if applicable)
        - Grand Total

3. **Integration Points**
    - Invoice approved by admin is stored in EMR under patient’s UHID.
    - Copy shared with **Patient App / Portal**.
    - Option for Print and approve to be added

Online Patient Booking – EHR Requirements

Case 1 – Patient Login / Registration

Step 1: Login

- Existing patients enter:

    - **Mail/ phone**
    - **Password**

- System validates credentials.
- On successful login → Patient Dashboard opens.

Step 2: Patient Directed to fill details

The patient must be directed to fill their other demographic details and past medical records from the patient dashboard.
Note: Edit option to be given for the patients

Case 2 – BOOK APPOINTMENT

1. **Book Appointment** → Select:

- Patient selects:
- Name, Mail, Phone no
    - **Department** → SMAART Balance / Eyes / Minds / Physio / General Medicine / Metabolism
    - **Preferred Doctor** (optional, from list of department doctors)
    - **Preferred Date & Time** (patient's desired slot)
- Patient clicks **"Request Appointment"** → Request saved in the system.

3. Admin receives **appointment requests** in Admin Dashboard.

- Admin checks:
    - Doctor availability
    - Department schedule
    - Slot conflicts / clinic rules
- Admin calls the patient to **confirm appointment**.

4. Finalize Appointment in EHR

- Admin enters confirmed:
    - Doctor
    - Date & Time
    - Visit Mode (In-person / Teleconsultation / Home Visit)
- Patient receives **confirmation** via SMS, Email

5. View Upcoming Appointments → With doctor, department, and status.

6. Access Past Records → Prescriptions, investigations, and consultation notes.

7. Payment / Billing → Make advance payments especially for teleconsultation.

Case 3 – Teleconsultation Payment & Invoice Generation

Step 1: Trigger Payment

- Patient requests a **teleconsultation** appointment (Case 2).
- Admin confirms the appointment and generates a **payment request and send the payment request form, gpay code or bank details in whatsapp/ email**.
- Payment must be completed **before the teleconsultation session** begins.

Admin Override (Manual Confirmation – Extended)

- **Admin Option:** *Option for Admin to create and generate invoice if payment is done*
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    - Invoice is stored in:
        - Patient Dashboard → *“Invoices / Billing”*
        - Admin Dashboard → *“Payment Records”*
        - *Option for Admin to cancel appointment if payment not done*

Case 4 – Teleconsultation & e-Prescription

Step 1: Start Teleconsultation

- Doctor logs into **Consultant Dashboard**.
- Selects the **confirmed teleconsultation appointment** (linked to UHID and Appointment ID).
- Patient logs into **Patient App** at the scheduled time.
- Meet link must be sent to doctors and patients

Step 2: Access Patient Records

- Doctor sees the :
    - Patient Name + UHID
    - Demographics (Age, Gender)

    - Past Medical History & Family History
    - Past Prescriptions, Investigations, and Lab Results

Step 3: Online Prescription Pad

Step 4: Finalize & Save Prescription

- Doctor can **Save Draft** or **Finalize Prescription**.
- Finalized prescription is:
    - Linked to **UHID + Appointment ID**
    - Stored in **EMR**
    - Shared to **Patient App / Portal**

Step 5: Post-Teleconsultation

- Patient receives **digital prescription** and can access it anytime.