Crm

mindsight/mindlyf

1) Dashboard -
2) Appointments
3) Patients
4) Refferrals
5) Programs
6) Courses
7) Business / billing
8) Tests
9) Settings

1- dashboard

1 - todays queue -

Todays - appointment (filter)

Programs

Course

Tests

which service more clients

filter location for offline

2 - appointments

Calendar - accessible by admin & doctor

Select doc -

Docs schedule - follow ups

Online / clinic mention next to it

3 - patients

For offline patients the admin will fill details on the spot with an otp on their phone

For online patients, kindly ask them these mandatory quetions

Name , gender, phno, email, address, referel

In the software there must be an option of billling, refund send an sms and email on the same automated

In the crm - software,

I want the doctor/ to have access to history, scanned docs, notes (area to type)

A button for (new)

4 - Referral

1 - to the doctors who we refer

Should be in the patients coloumn and a text should go to the patient as well as doctor that the patient has been refered to the particualr doc & contact details name and number of the doctor

2 - doctors who refer patietns to us

The message mst go that the particular patient visited the clinic on the particular day

Space to feed in data of the doctors who refer to us and who we refer to,

5 - Program

This will be a manual thing where it will be subjected to the availibility of the doctor

Admin will be alloting the counselor

Show patient name and details only to admin

6 - Courses

Is not a part of mindlyf website but the billing should be there

We will be integrating to the mindsight website

Only for becoming a counselor course we can share the e manual pdf. Once the payment is done

There wont be any partial payment

7 - billing

Summary

Billed amt

Unbilled amt

Amt recieved & amount pending

Also anytime an invoice is generated - for a referal also, the message and email must go to the doctor and the patient

8 - Tests

Mcmi & stuff

Tests reports will be manually sent to the clients by the counselors

Until the reports are made i.e 2 working days there should be red alerts to counselors as well as admin in order to send the reports.

9 - settings

MYNDLYF
WE'RE HERE TO HEAR

MindSight
FOR BETTER MENTAL HEALTH

1 - clinic settings - services (services - price)

- users (doc & staff)

1 - doctor - add doc, ph no, fees, patients per hour

Name, yr of exp, fee, gender, regular timings, add schedule { daily, s, m , t , w,th)

2 - staff - add - mobile no

FOR STAFF

1) Dashboard
2) Appointments
3) Patients
4) Referrals
5) Programs
6) Course
7) Testings
8) Settings

1) Patients -

ID, name, ph, last appt, online/offline, {new/ start date/enddate / export}

Billings in the patietns list itself, option- invoice/attach files --- the staff must not get other details on billing. The option shouldnt go on.

INVOICE - total amount, discount, mode of payment,

Staff - role - social media & other team - working days and working hours. Work update on hourly basis.

FOR DOCTORS

1) Dashboards
2) Appointments (schedule appointments)
3) Refferals - doctors
4) Programs
5) Courses
6) Tests

Each doctor can only see their profile and none other

Features

1) Adding multiple clinic locations for offline
2) Doctors must not be able to see patients ph nos should be xxxx900
3) Doc and patient must get notification also admin
4) Integration of appointments scheduled on website if payment has been released
5) Doctors / admin / staff daily update column in doctors list - explaining what all have they worked and their absence
6) Audio & video
7) Login panel for customers
8) Option of giving access to depending who all & how much
9) How will the patients connect with this ?