User Manual

for

HC Reimbursement Automation

Version 1.0

Prepared by

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Course: CS253

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Table of Contents

Revisions

Version	Primary Author(s)	Description of Version	Date Completed
Initial Draft (v1)	Gaurav Kumar, Nakula Neeraje, Rahul Rathod, Shantanu Thakur, Shorya Kumar,Sanchit Sinha Subhrojyoti Chatterjee, Priyanka Jalan, Harsh Kumar, Atreya Goswami	Built a web app that will allow users to apply for reimbursement claims online by simply filling an online form and providing required details. The system would also help users view already submitted forms and their status. The HC staff can scrutinize and verify the applications. They can approve and send the details to the Accounts department or reject the claims and update the status of the form..	03/04/22

Purpose of this Application

The IIT Kanpur campus community has been going through the tedious and time-taking procedure of applying for reimbursement claims at the Health Centre, IIT Kanpur.

- This process includes several interruptions at multiple stakeholders and verifications points.
- The manual nature of this paperwork makes it a time taking process.
- It becomes an ordeal for both the patient (or the person claiming the reimbursement) as well as the Health Centre Officials.
- There is a huge problem of document management as all reimbursement claim forms come with a bunch of documented proof including bills, test reports, etc. All these documents need to be stored and kept safe and organized for future reference.
- Extra coordinated manpower is needed to get the forms and the attached documents from one stakeholder to another for verification.
- In these pandemic times, when most people are hesitant to approach public places, let alone medical establishments, it becomes mandatory for the claimant to visit the Health Centre in person.

Some of the members of our development team have personally experienced this issue firsthand. So, when we were instructed to develop a software that caters to some issues faced by the *campus junta*, we immediately proposed to solve the above-mentioned issue by creating a digital platform/portal and automating the entire reimbursement claim verification process. Hence, we came up with this application, **HC Reimbursement Automation.**

This application solves all major issues in the following way -

- The interruptions at every verification point gets automated using simple digitized logic.
- The manual nature of the paperwork gets totally removed and all verification can be done digitally over electronic devices like laptops, phones, tablets, etc.
- This application makes the entire process extremely convenient for both the patient (or the person claiming the reimbursement) and the doctors, as well as all other officials like the Heath Centre Officials and the Accounts Officials.
- The document storage ordeal gets eradicated as all proofs and submitted documents would be stored digitally and in a very organized way, for quick reference in the future, if required.
- The extra manpower for physically transporting the forms and attached documents from one verification point to the other gets replaced by the standard digital data transfer protocol.
- This application digitizes this entire reimbursement claim process, hence there would be no longer a need for visiting the Health Centre in person.

Audience for this Document

This Document is useful for -

- **the Patients** - They would get to know how they can navigate through different functions in the portal, from signing up as patients to filling up reimbursement claim forms along with checking the status of their reimbursement request.

- **the Doctors** - They would get to know how they can navigate through submitted reimbursements claims and scrutinise the forms by going through the details and accepting/rejecting the claim at their level. This ranges from signing up as a doctor to accessing/viewing forms and adding feedback along with accepting/rejecting the forms.

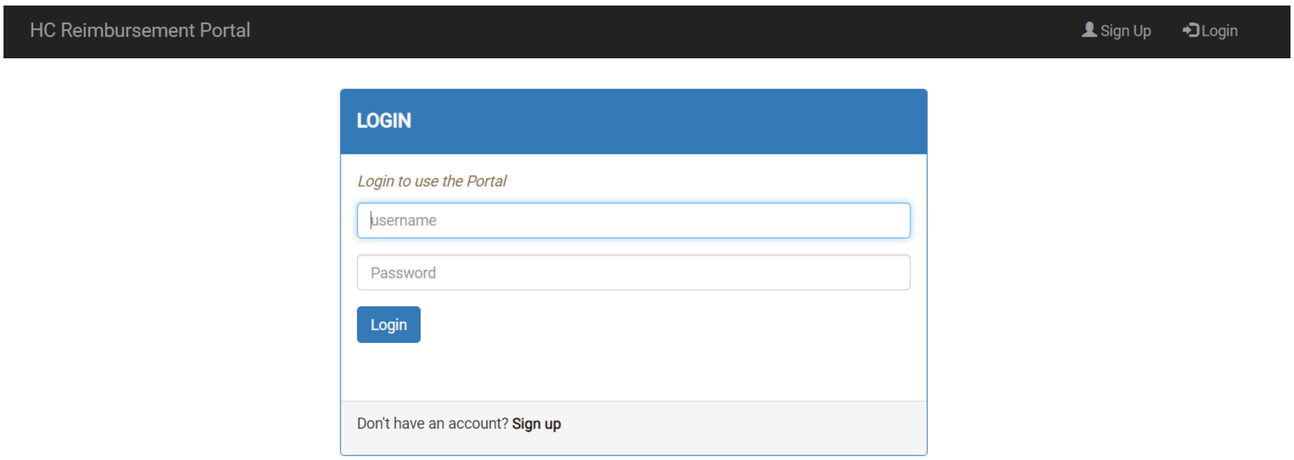
- **the HC Admin** - They would get to know how they can get hold of their side of portal management by knowing how they control the flow of requests between different stakeholders in the whole process. Along with that, they would get to know the navigation mechanism for the forms as well as the intricacies involved in accessing/viewing the forms. This will also include accepting/rejecting forms from their end, wherever allowed.

- **the Accounts Official** - They would get to know how they can navigate through the portal to scrutinize the forms by going through the details and accepting/rejecting the claim at their end. This ranges from registering as an Accounts Official to accessing/viewing forms and adding feedback along with accepting/rejecting the forms.

Signup and Login

Log In

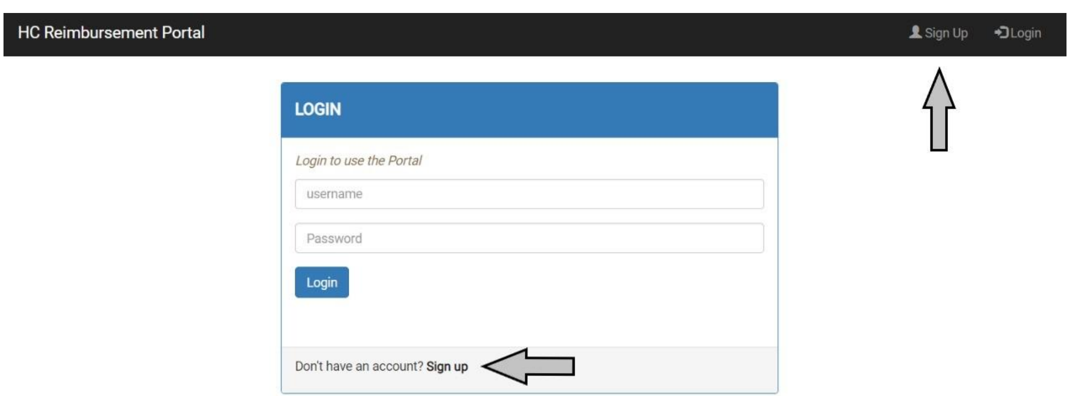
Users can log into the system using the **Log-In** page. The user needs to fill in the details like their *CC Username* and *Password* in the main login page. This login page is the central and the only login page for ALL types of users.



Sign-Up / Register User

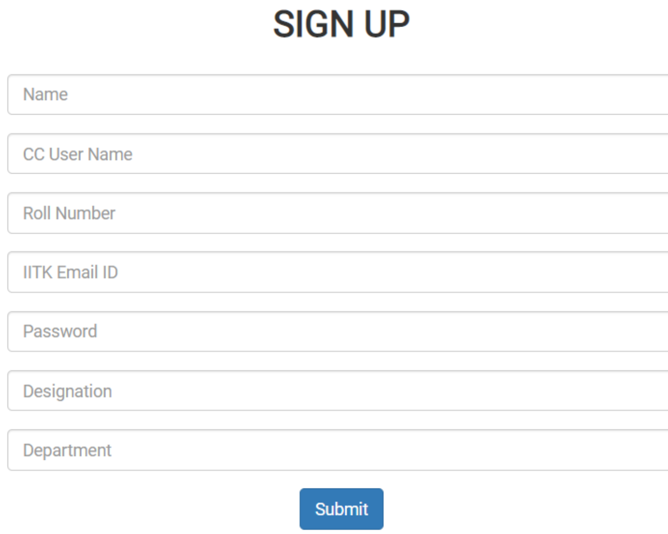
The **Sign-Up / Register User** feature is present at two different locations in the portal -

- Links to the general *patient* sign-up are present on the login screen.



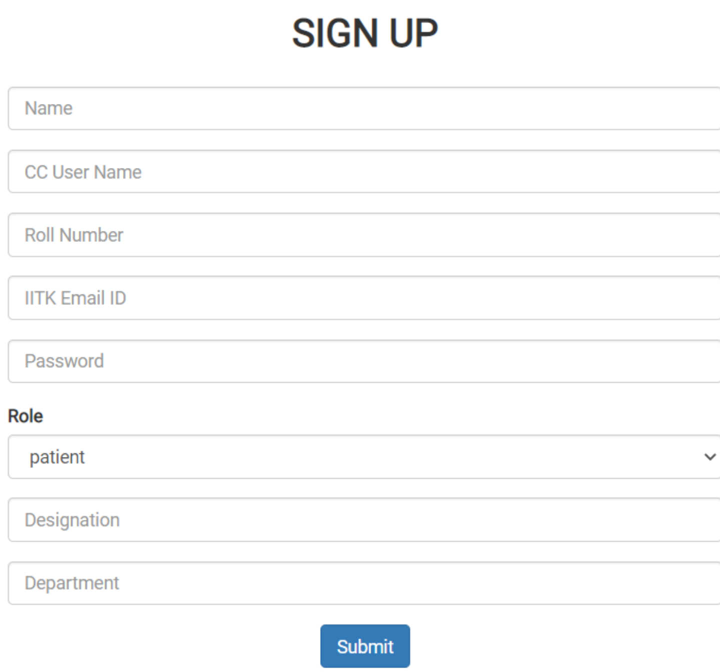
This signup page can ONLY be used by new patients to sign up to this portal. It requires the patient to fill out the basic user details like *Name*, *CC Username*, *Roll Number / ID Number*, *IITK Email ID*, *Designation*, and *Department*. Along with it, the user would have to enter a

Password to complete their signup process.



The second way to sign up is via the HC Admin home page. Since this page can be accessed ONLY by the HC Admin officials, only they can sign up users using this feature. Though patients can also be registered using this sign-up option, this option is especially to register doctors, other fellow HC Admin officials, and officials from the Accounts Office.

On this login page, the new user can be registered by filling out details like *Name*, *CC Username*, *Roll Number / ID Number*, *IITK Email ID*, *Role (Patient / Doctor / HC Admin / Accounts Official)*, *Designation*, and *Department*. Along with it, the user would have to enter a *Password* to complete their signup process.

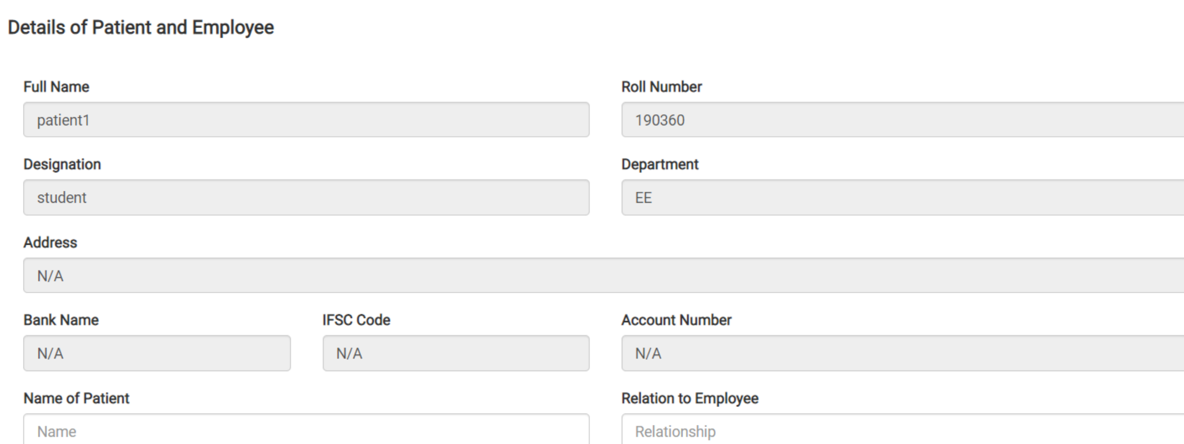


Filling Reimbursement Claim Forms

The main purpose of our application is to digitize the process of filling reimbursement claim forms. The form filling facility is provided to all users who are logged in the application with a *patient* account, i.e. the account used to login is that of a general patient.

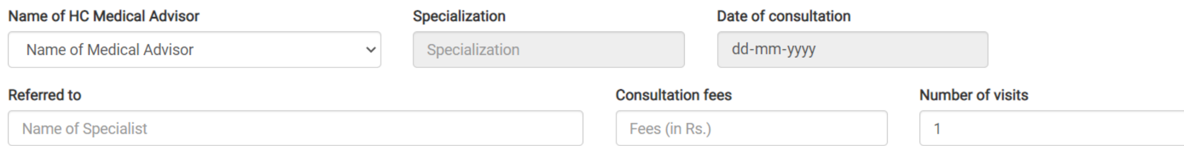
The user can click on the "*New Form*" option present on the header of their dashboard (given it is a *patient* profile).

This will navigate them to a new page where the user would have to fill in the extra details required. The user profile details would already be autofilled in the form (and would not be allowed to edit). Extra information will be asked before the claim is submitted like the *Patient Name* (who can be someone related to the user and has reimbursement coverage according to the institute rules) and their *Relationship to the Employee* (i.e, their relationship to the user).

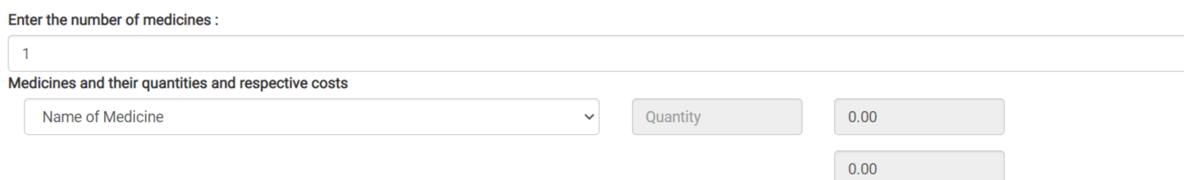


Next the user would have to fill in all the necessary details for the reimbursement claim.

Firstly they would have to choose the *Name of HC medical Advisor*, from the list of all registered Medical Advisor/Doctors at the HC (shown as a dropdown menu at the corresponding field), who was consulted for the medical issue, along with the *Date of consultation*. The *Specialisation* of the selected doctor would be autofilled. These fields are "compulsory" fields.The user also needs to fill in the name of the Specialist to whom he/she was *Referred to* (if any) along with the corresponding *Consultation Fees* and the *Number of Visits* made to the said Specialist (if any).

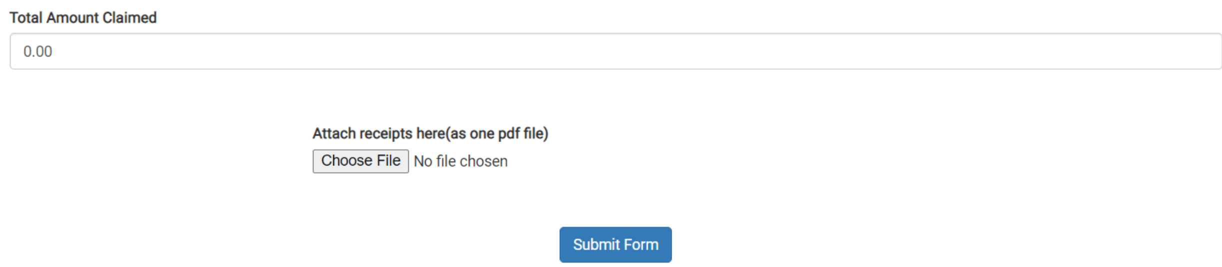


The user, then, needs to enter the medicines purchased on which the reimbursement is being claimed. Firstly, the user needs to *Enter the number of medicines* in the corresponding field. Subsequently, that many rows would appear below it. The user can then choose the *Medicine Name* (from a list of medicine shown as a dropdown menu) and their *Quantity*. The individual *Cost* would automatically be calculated and shown as the non-editable field in each row. And at the end of all the rows for 'Medicines', total *Cost* would be displayed as a non-editable field.



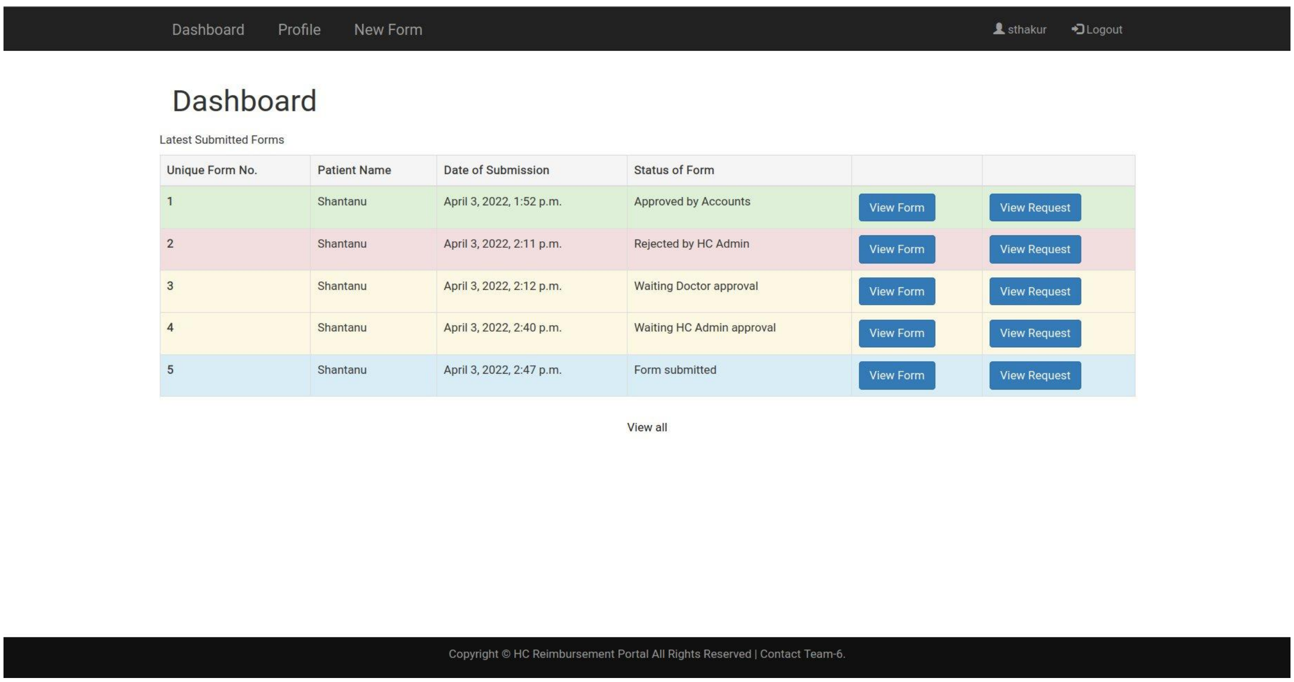
The user, then, needs to enter the tests taken on which the reimbursement is being claimed. Firstly, the user needs to *Enter the number of tests* in the corresponding field. Subsequently, many rows would appear below it. The user can then choose the *Test Name* (from a list of tests shown as a dropdown menu), the corresponding *Lab Name*, and the *Cost* of that test. And at the end of all the rows for 'Tests', total *Cost* would be displayed as a non-editable field.

After filling all these details, the *Total Amount Claimed* would be calculated automatically and displayed at the end of the form as a non-editable field. Next, the user can click on the *Choose File* option under the *Attach receipts here* heading, and *upload a single pdf file* containing all the required documents. After verifying that all entered details in the entire form is correct, the user can click on the *Submit* button to submit the reimbursement claim form.



Viewing previously filled forms

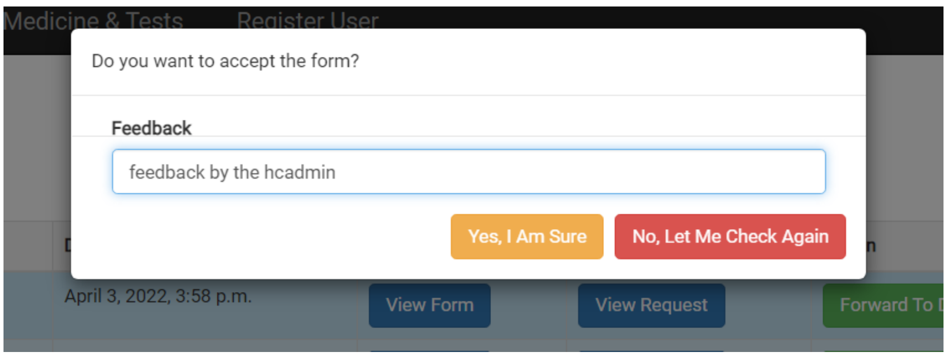
The *patients* can view previously filled forms by logging in to the application. The previously filled forms would be displayed on their own *patient's dashboard*, along with information like the *Form ID, Patient Name, Date of Submission and Status of the Form*. The
 and *View Request* options will also be available beside each of them.



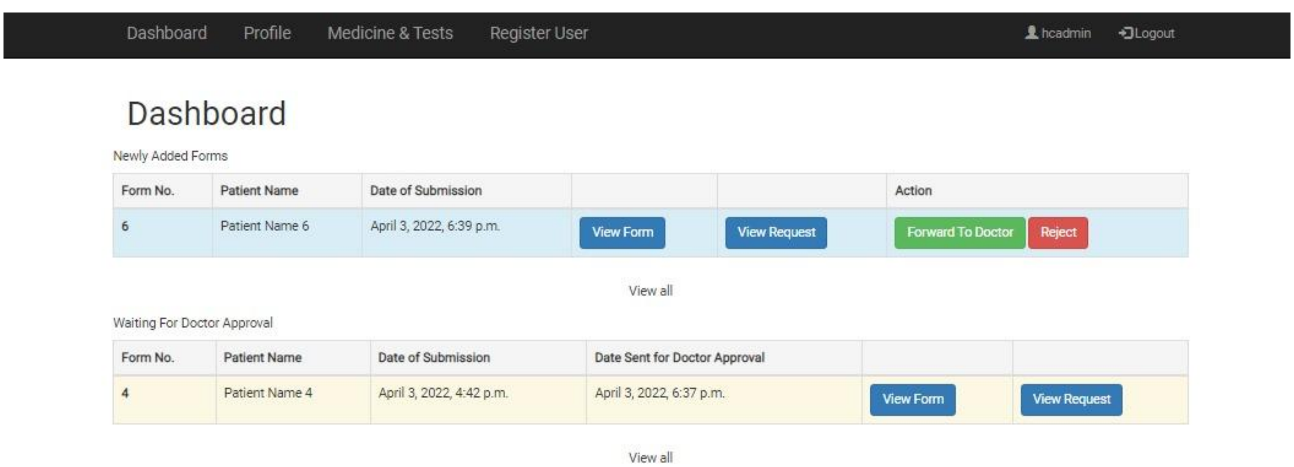
Viewing Forms in Dashboard

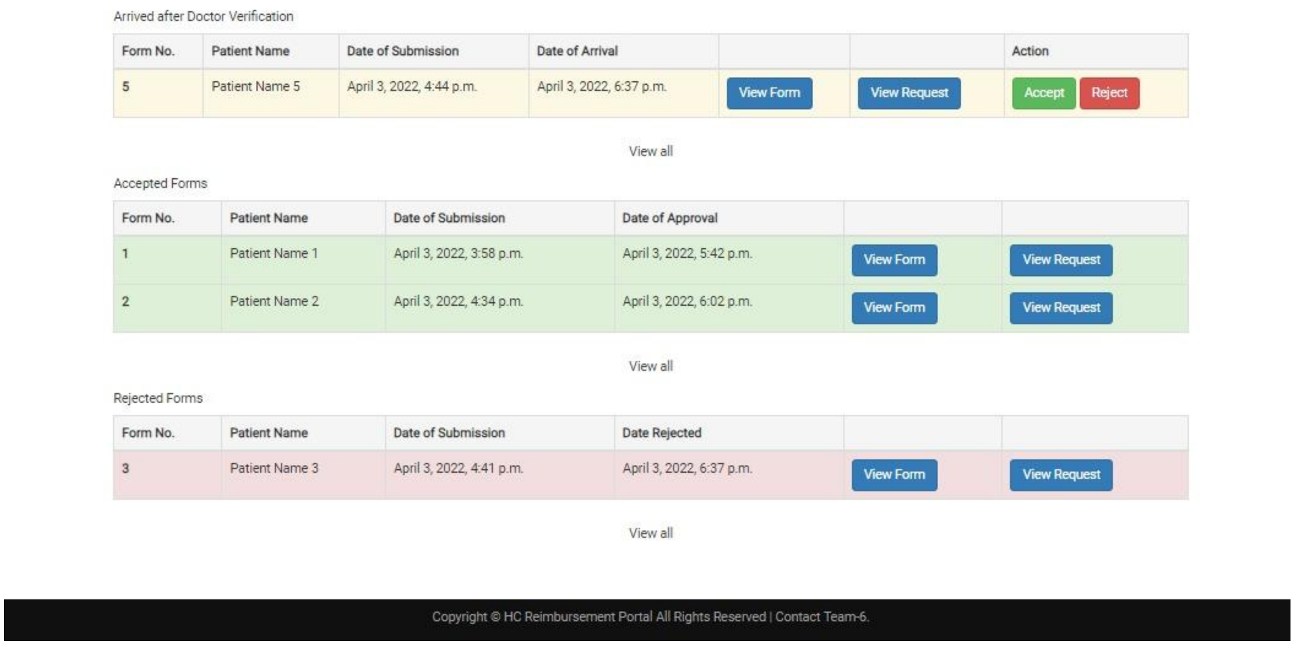
HC Admin

The HC Admin dashboard contains three sections namely Pending Forms, Accepted Forms and Rejected Forms. The HC Admin can view the pending forms under the Pending forms section.
The HC Admin now has the option to either forward the reimbursement request to the Doctor, or reject it. The “Forward to Doctor” button forwards the request to the doctor. It also asks for a feedback to be passed on to the doctor. The “Reject” button rejects the request.



After the form is verified by the doctor, the form once again comes back to the HC Admin to be accepted or rejected. If accepted, the form is sent to the Accounts Office. If the form is rejected, the form status is updated in the patient’s dashboard. These actions can be performed by “Accept” and “Reject” buttons respectively.





Arrived after Doctor Verification

Form No.	Patient Name	Date of Submission	Date of Arrival			Action
5	Patient Name 5	April 3, 2022, 4:44 p.m.	April 3, 2022, 6:37 p.m.	View Form	View Request	Accept Reject

View all

Accepted Forms

Form No.	Patient Name	Date of Submission	Date of Approval		
1	Patient Name 1	April 3, 2022, 3:58 p.m.	April 3, 2022, 5:42 p.m.	View Form	View Request
2	Patient Name 2	April 3, 2022, 4:34 p.m.	April 3, 2022, 6:02 p.m.	View Form	View Request

View all

Rejected Forms

Form No.	Patient Name	Date of Submission	Date Rejected		
3	Patient Name 3	April 3, 2022, 4:41 p.m.	April 3, 2022, 6:37 p.m.	View Form	View Request

View all

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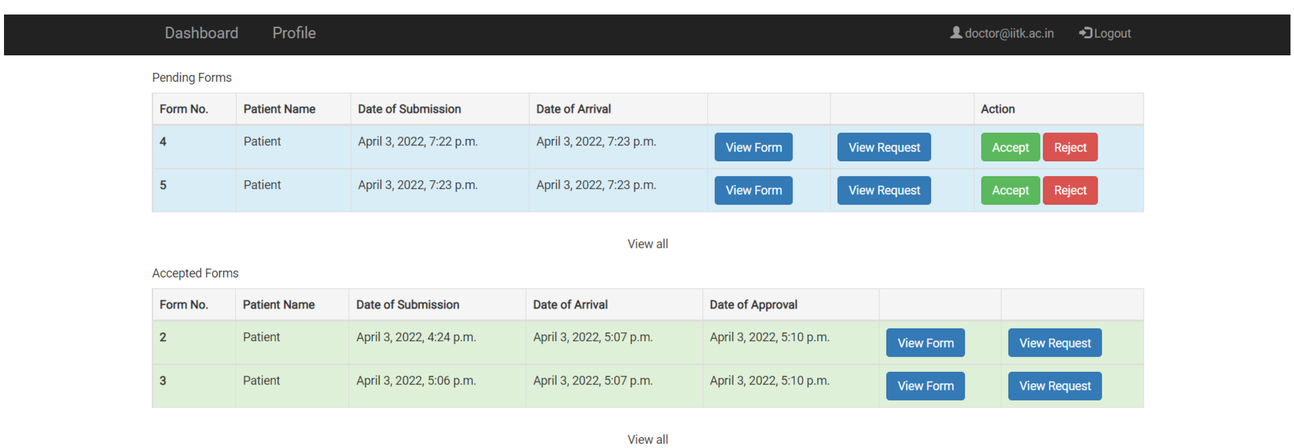
The forms accepted by HC admin are now moved from the “Pending Forms” section to the “Accepted Forms” section in the HC Admin dashboard. The forms rejected by HC admin are now moved from the “Pending Forms” section to the “Rejected Forms” section in the HC Admin dashboard.

<u>Doctor</u>

The Doctor’s dashboard contains three sections namely Pending Forms, Accepted Forms and Rejected Forms. The Doctor can view the pending forms under the “Pending forms” section.

The Doctor now has the option to either accept the reimbursement request or reject it. The “Accept” button accepts the request forwarded by the HC Admin. The “Reject” button rejects the request forwarded by the HC Admin..



Dashboard Profile doctor@iitk.ac.in Logout

Pending Forms

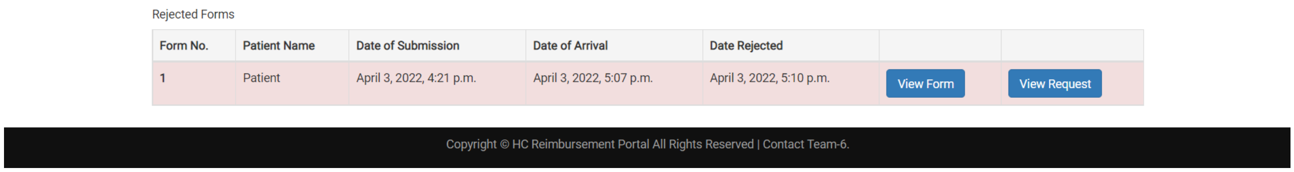
Form No.	Patient Name	Date of Submission	Date of Arrival			Action
4	Patient	April 3, 2022, 7:22 p.m.	April 3, 2022, 7:23 p.m.	View Form	View Request	Accept Reject
5	Patient	April 3, 2022, 7:23 p.m.	April 3, 2022, 7:23 p.m.	View Form	View Request	Accept Reject

View all

Accepted Forms

Form No.	Patient Name	Date of Submission	Date of Arrival	Date of Approval		
2	Patient	April 3, 2022, 4:24 p.m.	April 3, 2022, 5:07 p.m.	April 3, 2022, 5:10 p.m.	View Form	View Request
3	Patient	April 3, 2022, 5:06 p.m.	April 3, 2022, 5:07 p.m.	April 3, 2022, 5:10 p.m.	View Form	View Request

View all

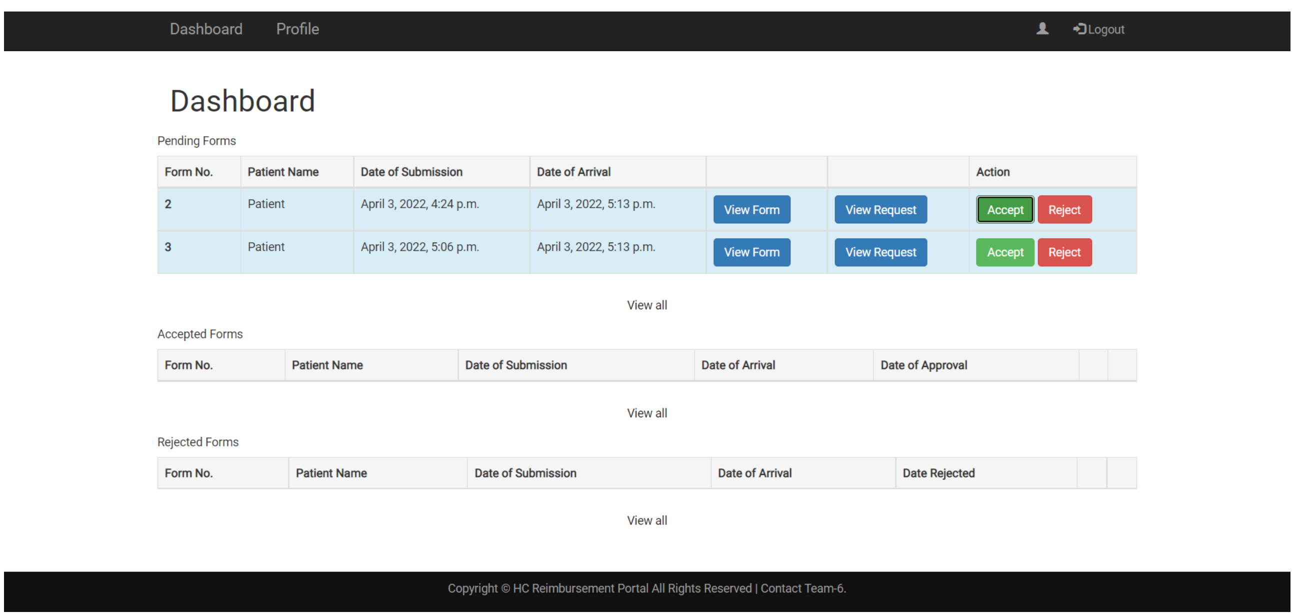


The forms accepted by Doctor are now moved from the “Pending Forms” section to the “Accepted Forms” section in the Doctor’s dashboard. The forms rejected by Doctor are now moved from the “Pending Forms” section to the “Rejected Forms” section in the Doctor’s dashboard.

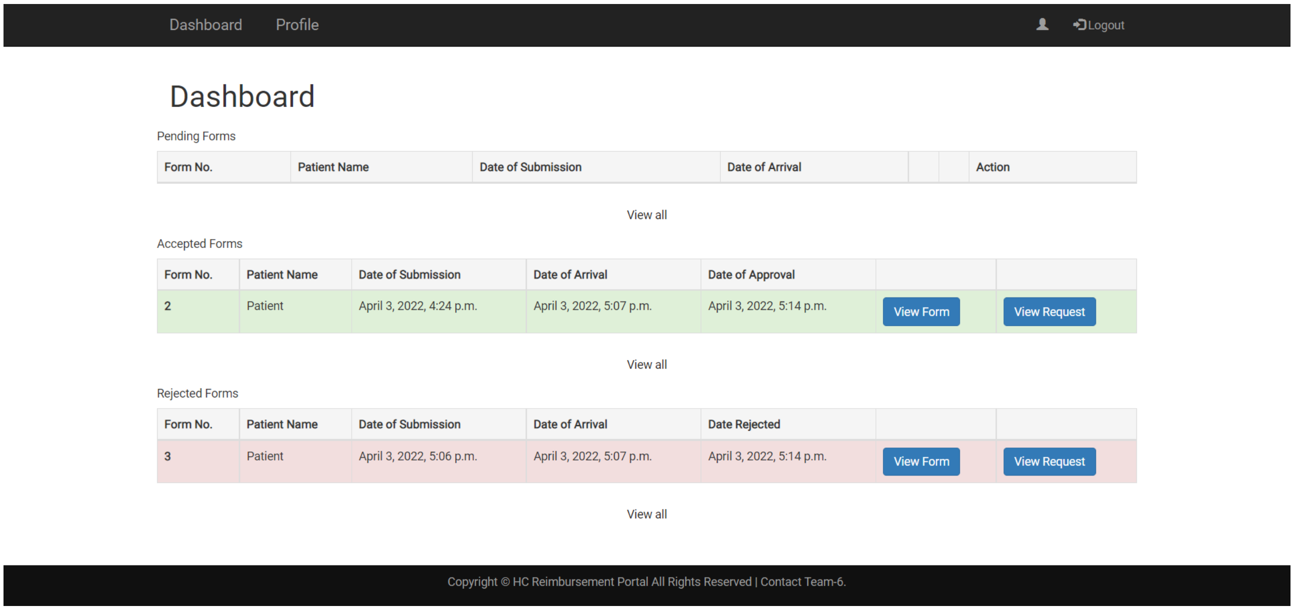
Accounts

The Accounts dashboard contains three sections namely Pending Forms, Accepted Forms and Rejected Forms. The Accounts Office can view the pending forms under the Pending forms section.

The Account’s dashboard has the option to either accept the reimbursement request or reject the request. The form can be accepted by using the “Accept” button given on the form tab. The form can be rejected by using the “Reject” button given on the form tab.



Once the Account’s Office accepts the request, the request is moved to the “**Accepted Forms**” section. If the Account’s Office rejects the request, the request is moved to the “**Rejected Forms**” section.


Dashboard
Profile
Logout
Dashboard
Pending Forms
Form No.
Patient Name
Date of Submission
Date of Arrival
Action
View all
Accepted Forms
Form No.
Patient Name
Date of Submission
Date of Arrival
Date of Approval
2
Patient
April 3, 2022, 4:24 p.m.
April 3, 2022, 5:07 p.m.
April 3, 2022, 5:14 p.m.
View Form
View Request
View all
Rejected Forms
Form No.
Patient Name
Date of Submission
Date of Arrival
Date Rejected
3
Patient
April 3, 2022, 5:06 p.m.
April 3, 2022, 5:07 p.m.
April 3, 2022, 5:14 p.m.
View Form
View Request
View all
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Approving/Rejecting Claim Forms

A reimbursement form submitted by a patient, is sent to various administrative roles to be verified and finally be approved. Thus the feature to approve or reject claimed forms is provided to users with roles as hc admin, accounts and doctor.

<u>HC Admin Role -</u>

1) A newly submitted form by a patient is displayed on the HC Admin dashboard to be forwarded to the doctor.

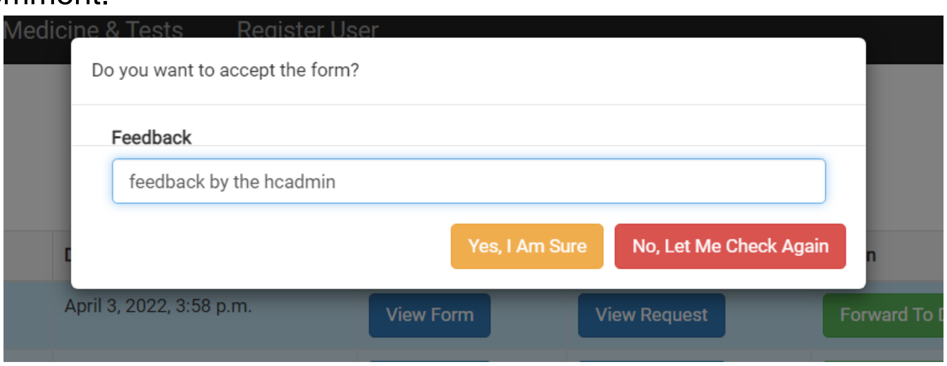
Dashboard

Newly Added Forms

Form No.	Patient Name	Date of Submission			Action
1	Patient Name 1	April 3, 2022, 3:58 p.m.	View Form	View Request	Forward To Doctor Reject
2	Patient Name 2	April 3, 2022, 4:34 p.m.	View Form	View Request	Forward To Doctor Reject
3	Patient Name 3	April 3, 2022, 4:41 p.m.	View Form	View Request	Forward To Doctor Reject
4	Patient Name 4	April 3, 2022, 4:42 p.m.	View Form	View Request	Forward To Doctor Reject
5	Patient Name 5	April 3, 2022, 4:44 p.m.	View Form	View Request	Forward To Doctor Reject

View all

HCAdmin can view the form information and the transaction status info using the corresponding tabs as explained before. On verifying the information they can click on the "Forward to Doctor" button. A final pop-up is presented where HCAdmin can add feedback/comment.



After adding the feedback, they can click on "Yes, I am sure" to finally f**orward the form for doctors approval**. To remove the pop-up and for later review of the claimed form, the corresponding button can be clicked.

The form can also be rejected by clicking on the "Reject" button, and following a similar procedure as forwarding the form, a pop-up is presented where the HCAdmin can add feedback/comment and finally reject the form.

The forwarded forms are displayed under the “Waiting for Doctor Approval” section and the rejected forms under the “Rejected Forms” section.

2) The forms arrived after verification by the doctor are displayed under the “Arrived after Doctor Verification” section.

Waiting For Doctor Approval

Form No.	Patient Name	Date of Submission	Date Sent for Doctor Approval		
2	Patient Name 2	April 3, 2022, 4:34 p.m.	April 3, 2022, 5:17 p.m.	View Form	View Request

View all

Arrived after Doctor Verification

Form No.	Patient Name	Date of Submission	Date of Arrival			Action
1	Patient Name 1	April 3, 2022, 3:58 p.m.	April 3, 2022, 5:17 p.m.	View Form	View Request	Accept Reject

View all

HCAdmin can view the form information and the transaction status info using the corresponding tabs as explained before. On verifying the information they can click on the “Accept” button. A final pop-up is presented where HCAdmin can add feedback/comment.

After adding the feedback, they can click on “Yes, I am sure” to finally forward accept the form and **forward to the account’s** office. To remove the pop-up and for later review of the claimed form, the corresponding button can be clicked.

The form can also be rejected by clicking on the “Reject” button, and following a similar procedure as forwarding the form, a pop-up is presented where the HCAdmin can add feedback/comment and finally reject the form.
The forwarded forms are displayed under the “Accepted Forms” section and the rejected forms under the “Rejected Forms” section.

<u>Doctor’s Role-</u>

A forwarded reimbursement form forwarded by the HCAdmin for approval by the doctor is displayed on the Doctor’s Dashboard-

Dashboard Profile doctorid Logout

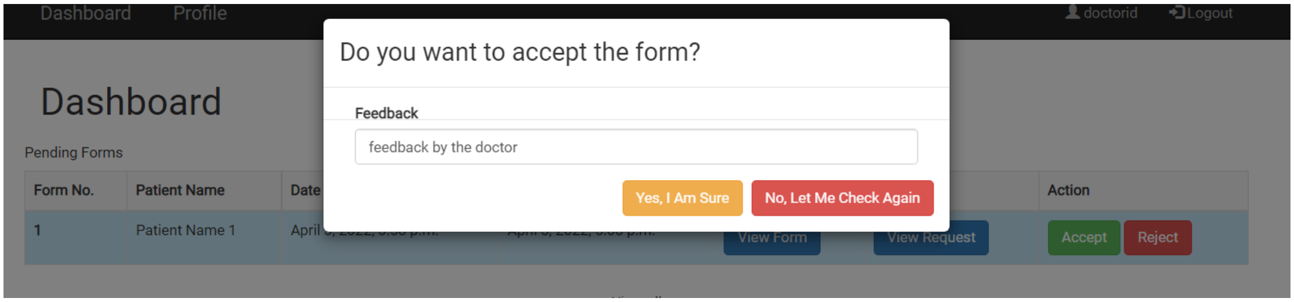
Dashboard

Pending Forms

Form No.	Patient Name	Date of Submission	Date of Arrival			Action
1	Patient Name 1	April 3, 2022, 3:58 p.m.	April 3, 2022, 5:08 p.m.	View Form	View Request	Accept Reject

View all

The doctor can view the form information and the transaction status info using the corresponding tabs as explained before. On verifying the information they can click on the "Accept" button. A final pop-up is presented where the doctor can add feedback/comment.



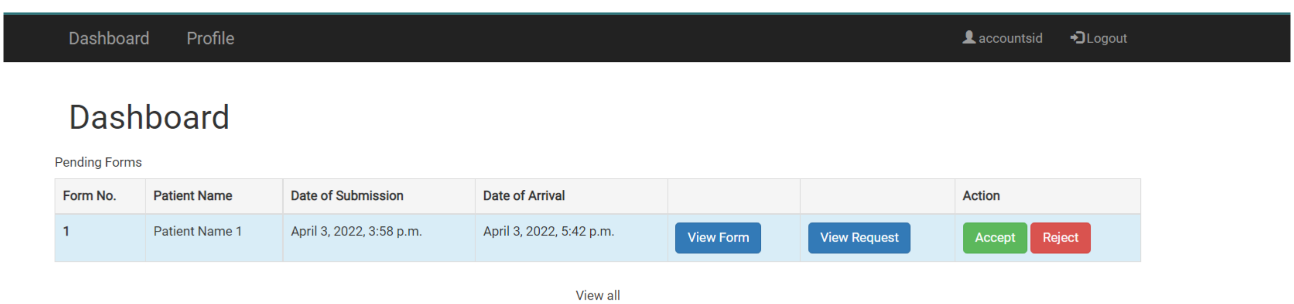
After adding the feedback, they can click on "Yes, I am sure" to finally **forward the form to HCAdmin** for further verification. To remove the pop-up and for later review of the claimed form, the corresponding button can be clicked.

The form can also be rejected by clicking on the "Reject" button, and following a similar procedure as forwarding the form, a pop-up is presented where the doctor can add feedback/comment and finally reject the form.

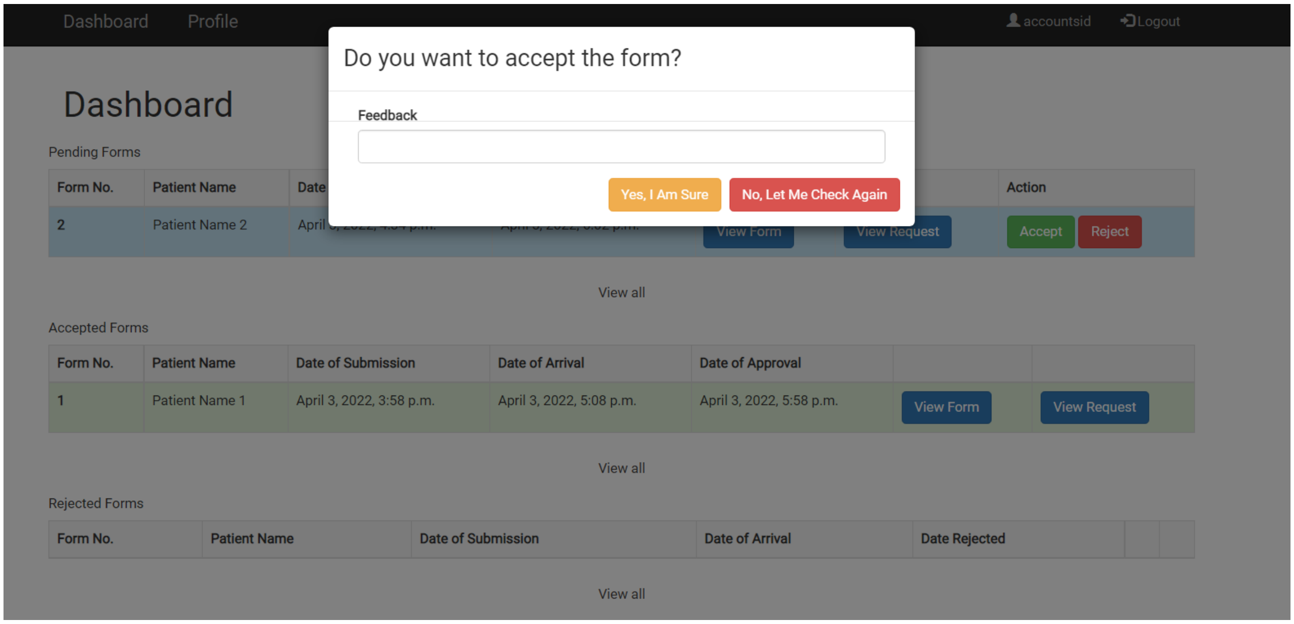
The accepted forms are displayed under the "Accepted Forms" section and the rejected forms under the "Rejected Forms" section.

<u>Account's Role-</u>

A reimbursement form accepted by the HCAdmin is forwarded to the Accounts office and displayed on the Accounts official dashboard-



The accounts official can view the form information and the transaction status info using the corresponding tabs as explained before. On verifying the information they can click on the "Accept" button. A final pop-up is presented where the accounts official can add feedback/comment.



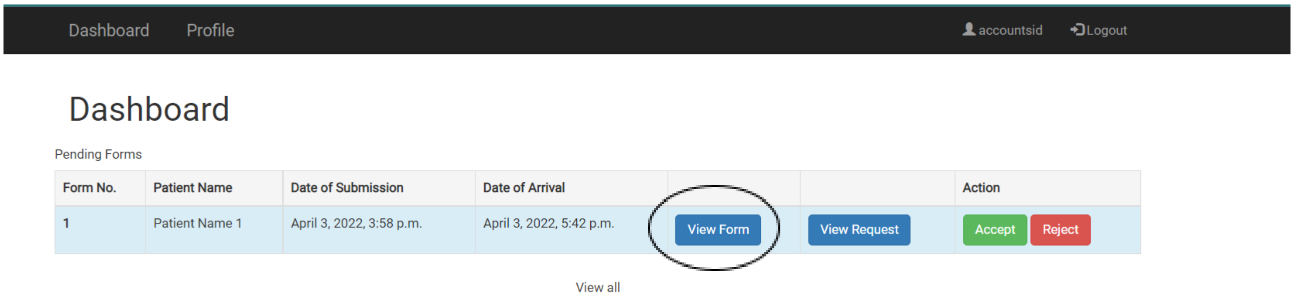
After adding the feedback, they can click on “Yes, I am sure” to **finally accept the form**. To remove the pop-up and for later review of the claimed form, the corresponding button can be clicked.

The form can also be rejected by clicking on the “Reject” button, and following a similar procedure as forwarding the form, a pop-up is presented where the account’s official can add feedback/comment and finally reject the form.

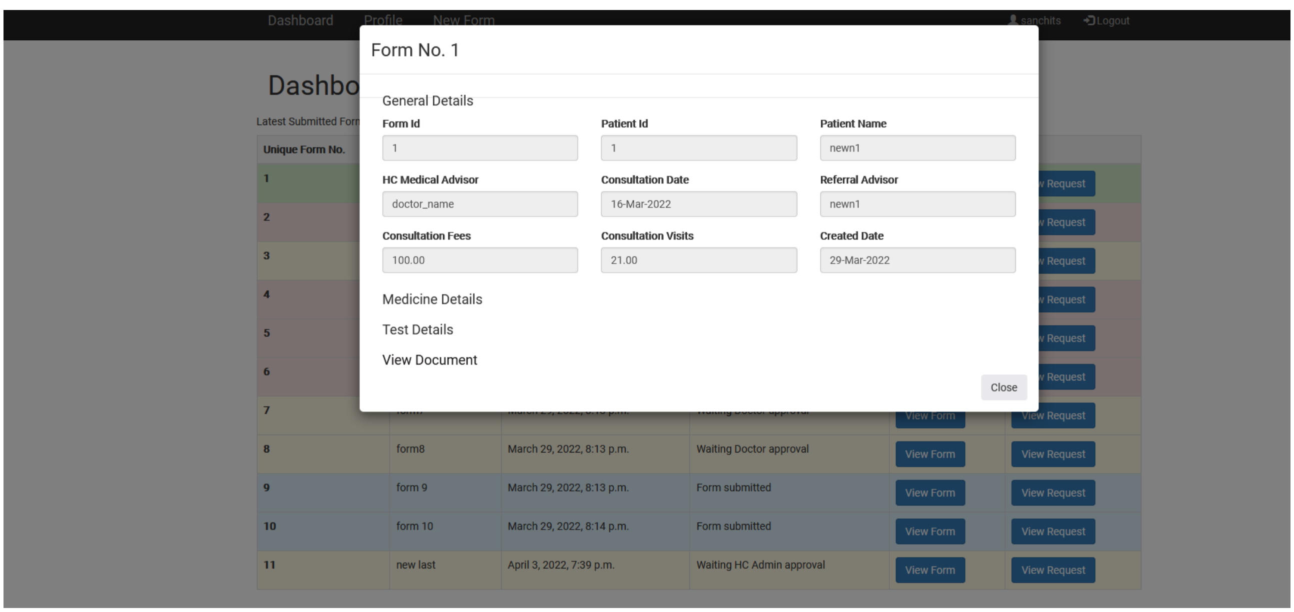
The accepted forms are displayed under the “Accepted Forms” section and the rejected forms under the “Rejected Forms” section.

View Form

There is a *View Form* button provided next to every form on the dashboard. It appears in the dashboard of all users irrespective of their roles.



Clicking it opens the respective form in a **read-only** mode as shown in the picture below. Most of the details displayed are filled by the patient while filling the form for submission.



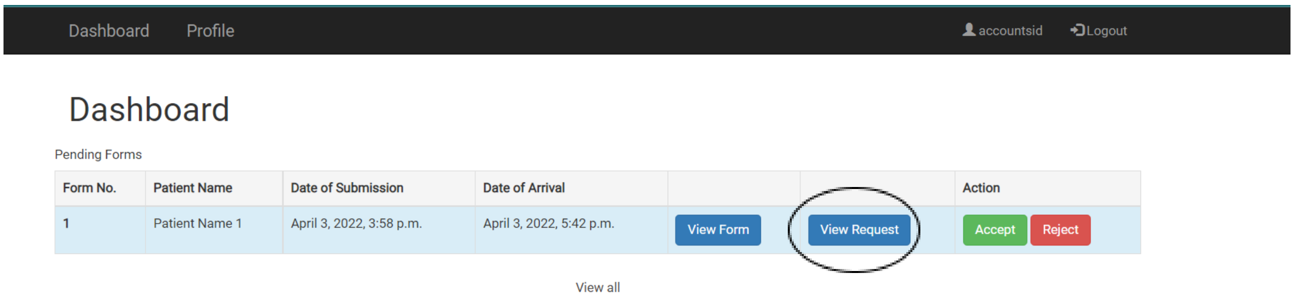
The pop form consists of four main sections:-

1. General Details: It has several sections
   a. Form id: It is a unique id allotted to every form
   b. Patient id: It is a unique id allotted to every patient
   c. HC Medical Advisor: It shows the name of the HC Medical Advisor selected by the patient while filling the form.
   d. Consultation Date: It shows the date on which the patient consulted HC.

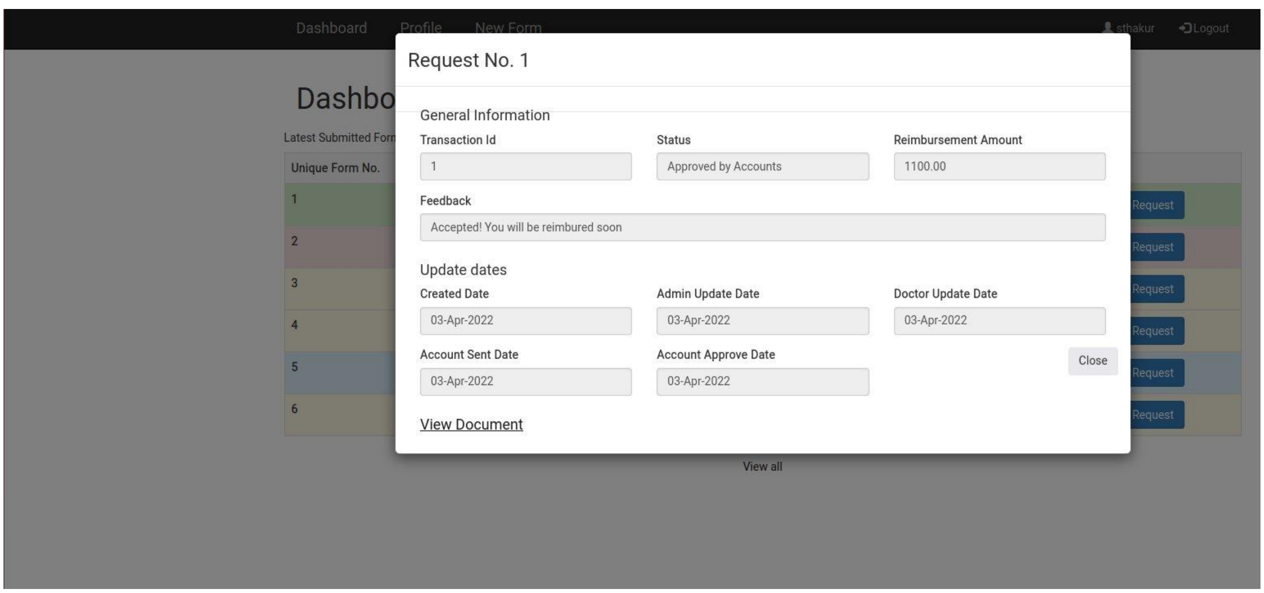
   e. Referral Advisor: It shows the name of Referral Doctor (if exists), referred by HC Medical Advisor
   f. Consultation Fees: It shows the consultation fees charged by the referred doctor.
   g. Consultation Visits: It stores the total number of paid visits to the referred doctor.
   h. Created Date: It shows the date on which the form was created.
2. Medicine Details: Every row corresponds to a medicine and it has three sections
   a. Medicine Name: It stores the name of the medicine
   b. Quantity: It stores the number of units of that specific medicine purchased by the patient.
   c. Total Cost: It stores the total cost of all the units of that medicine.
3. Test Details: Every row corresponds to a test and it has three sections
   a. Test Name: It stores the name of the test
   b. Lab Name: It stores the name of the lab where the test was conducted
   c. Total Cost: It stores the total amount paid by the patient for the test
4. View Document: When it is clicked on, it opens the document which was attached with the form by the patient in a new tab.

View Request

There is a *View Request* button provided next to every form on the dashboard. It appears in the dashboard of all users irrespective of their roles.



Clicking it opens the respective form in a **read-only** mode as shown in the picture below.



The pop form consists of three main sections:-

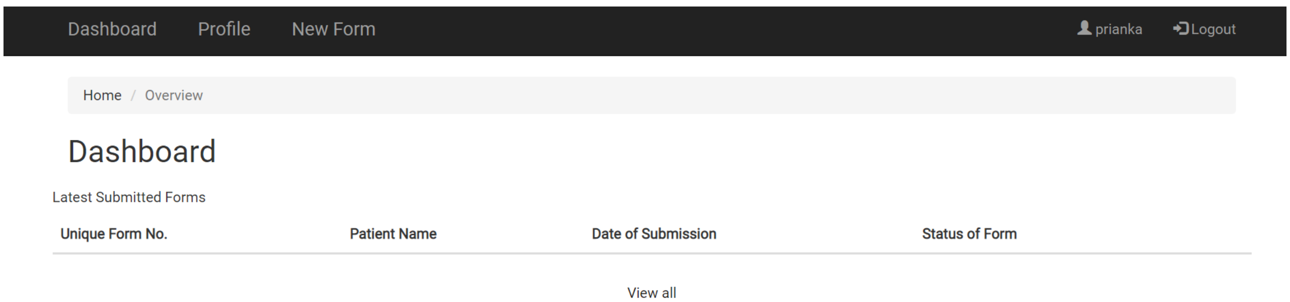
1. General Details: It has several sections
    a. Transaction id: It is a unique id allotted to every transaction
    b. Status: It shows the status of the form.
    c. Reimbursement amount: It displays the reimbursement amount claimed by the patient
    d. Feedback: It shows the latest feedback on the form. Feedback can be given by *hc admin, doctor* and *accounts*.
2. Update Dates: It displays the dates on which important events corresponding to the form occured. If the field is empty, it implies that the event has not occurred yet:

a. Created Date: Displays the date on which the form was created.
b. Admin Update Date: Displays the date on which the form status was updated by *hcadmin.*
c. Doctor Update Date: Displays the date on which the form status was updated by the *doctor.*
d. Account Sent Date: Displays the date on which the form was sent to Accounts by *hc admin* for reimbursement.
e. Account Approve date: Displays the date on which the form is approved by *accounts.*

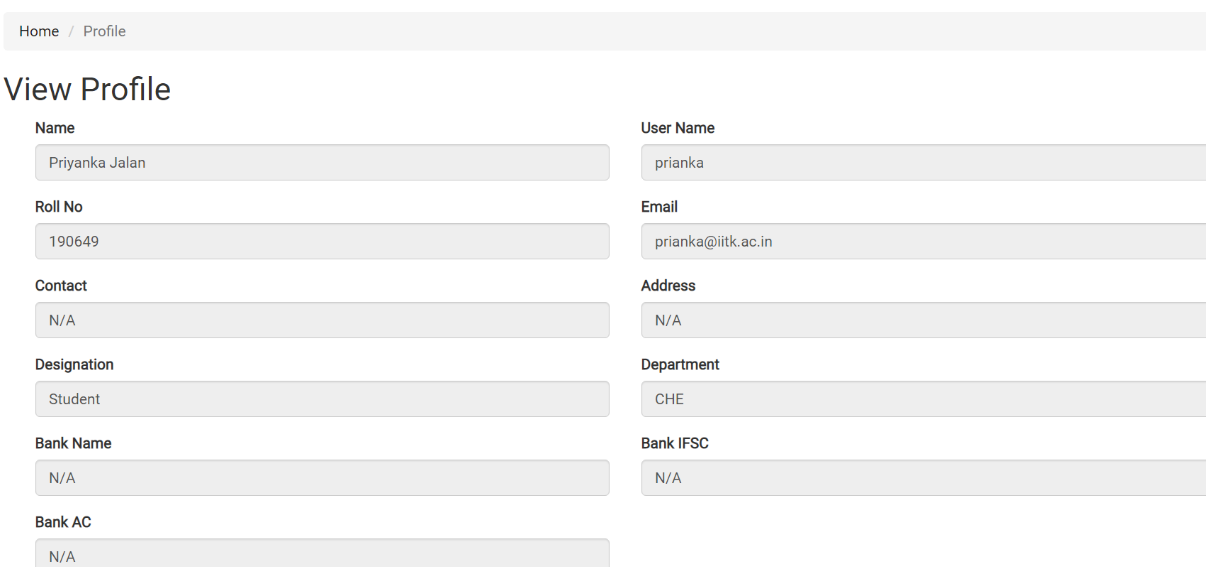
3. View Document: When it is clicked on, it opens the document which was attached with the form by the patient in a new tab.

View and Update Profile

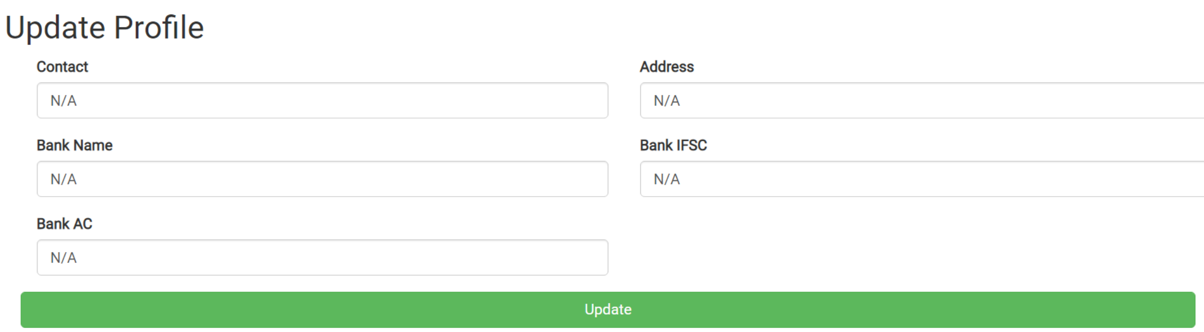
After a patient has signed up and logged into the system, they are redirected to their dashboard where they can fill a new form, update their profile, or logout.



The user can click on the “Profile” option in the header of the dashboard to view their current profile details. The user profile details i.e. *Name*, *UserName*, *RollNo*, *Email*, *Designatio*n and *Department* are autofilled which were provided during the user signup process and cannot be edited.

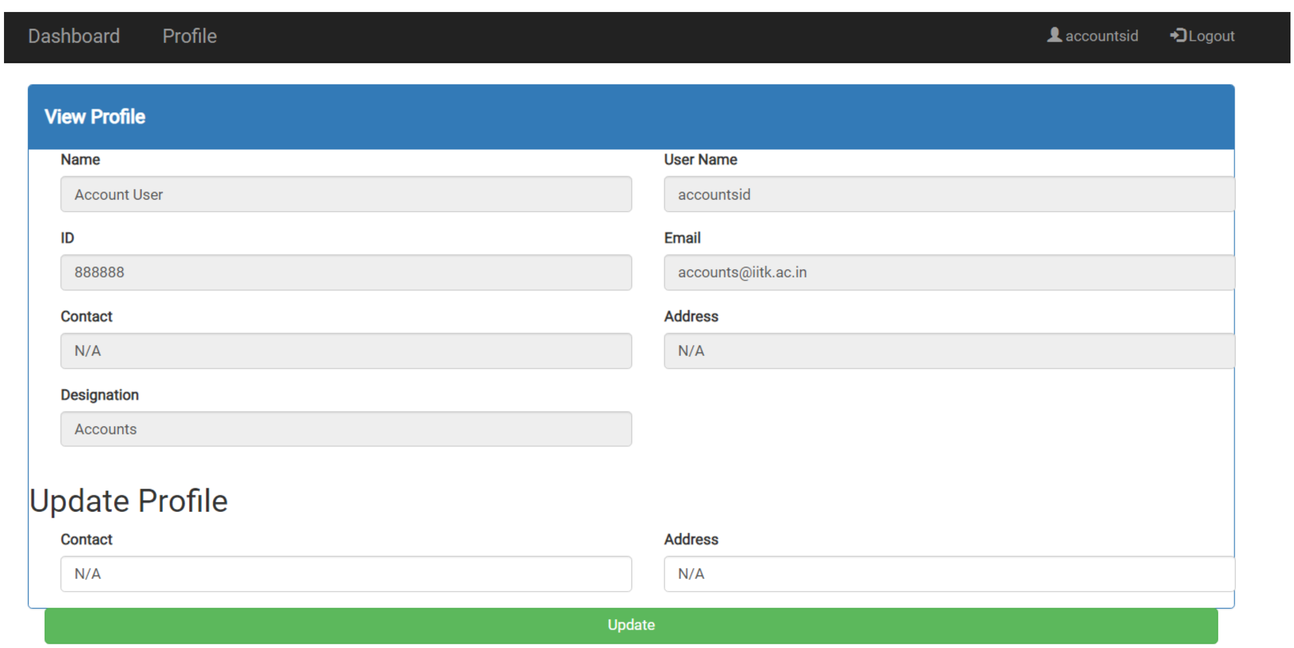


The user can provide details of *Contact, Address, Bank Name, Bank IFSC, Bank AC* in the corresponding fields provided at the end of the profile page. After verifying the provided details, the user can click on “Update” button to successfully update the provided fields in the profile.



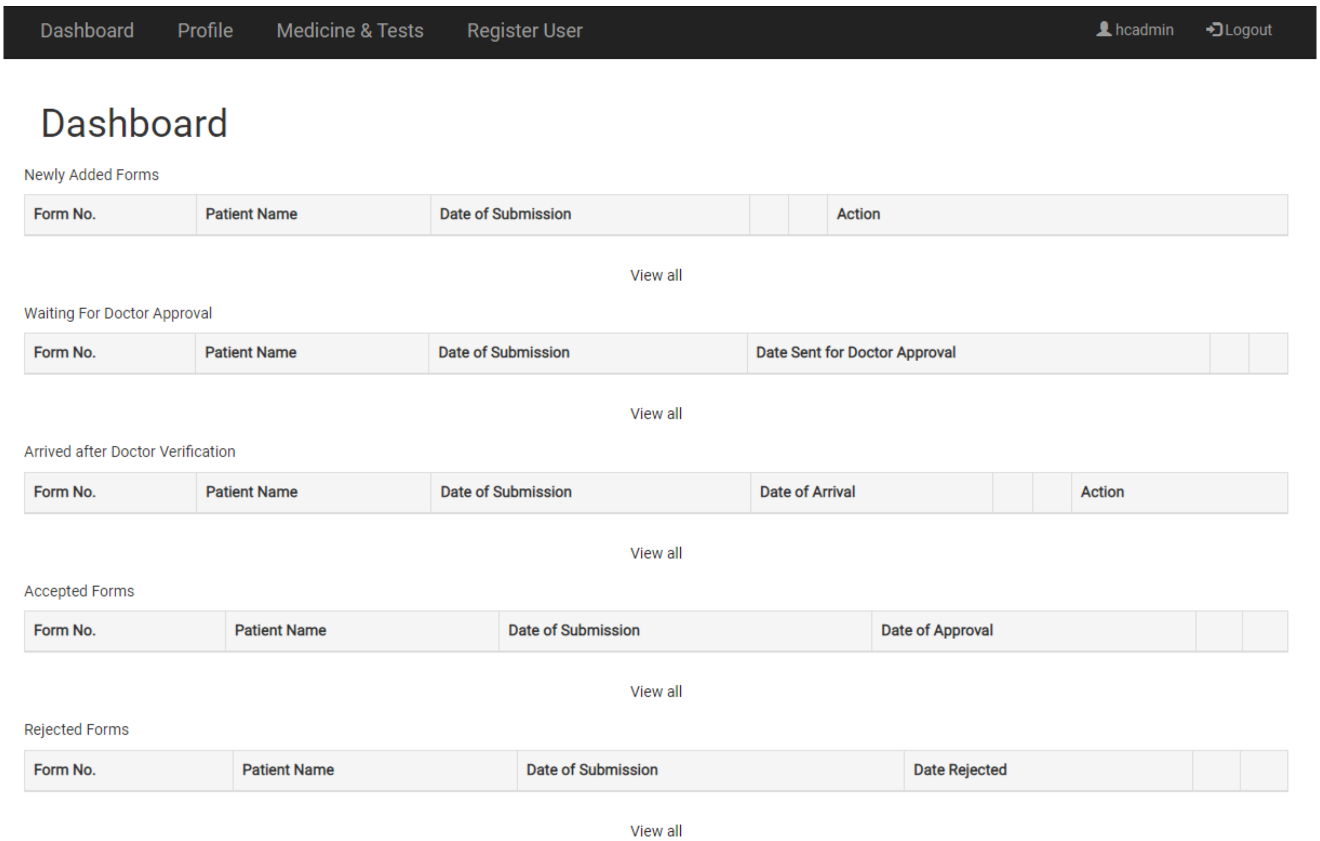
Similarly, a user with a role as hc admin, accounts, or user, can update their profile using the “Profile” tab present in their dashboard.

The users with the above mentioned roles can provide details of *Contact* and *Address* in the corresponding fields provided at the end of the profile page. After verifying the provided details, the user can click on the “Update” button to successfully update the provided fields in the profile.



Adding/Deleting Medicine/Tests by HC Admin

After the HC Admin has logged as the “hc admin” role into the system, they can access their corresponding dashboard allowing them to view forms, update their profile, register a user with a given role and add/delete medicine/tests which can be added in the form submitted by patient as a reimbursement claim.



The admin can view all the currently present as well as add/delete medicine/tests from the “Medicine and Tests” option present in the header. All the medicines added can be found under the “List of Medicines" tab with the corresponding fields as *Name of Medicine*, *Brand* and *Price*. Similarly, the tests present which can be added as a reimbursement claim can be found under the “List of Tests" tab.

Adding Medicines/Tests

To add a new medicine, the HC Admin can enter the details of *Name of Medicine*, *Brand* and *Price* into the corresponding field and click on “Add Medicines” button, which adds the medicine information to the database and updates the list as displayed on the page.

Similarly to add a new test the HC Admin can enter the *Name of Test* into the present field and click on the “Add Tests” button, which adds the tests name to the database and updates the list as displayed on the page.

Deleting Medicines/Tests

The HCAdmin can delete a medicine/test present in the database by clicking on the “Delete” button present correspondingly to each medicine/test.
For each successful deletion, a message “Medicine deleted successfully" is displayed and the list of the medicines is updated.