

Document Name	Gopanoptic Documentation
Authors	Mian Asad Hussain
Document S.Date	29-june-2021
Document E.Date	3-July-2021
Target Audience	End User, Development, Technical Support, Quality Assurance
Document Reviewer	Hamza Awais & Hassan

Introduction	5
User Roles	5
Admin	5
Staff members	5
Admin user	5
Fields	8
How to create fields	9
Create Placeholder (toggle)	9
Update and delete fields	10
search and filters in fields	11
Forms	11
How can we edit/update the fields in the form section?	13
how we can configure our fields.	13
Skip Question	15
Purpose	15
New task	16
Purpose	18
Add Narrative/References	19
Purpose	19
Fields that have this option?	19
How to add reference/narrative ?	19
Note: The above field placeholders must be created.	19
How will the references be Printed?	20
Latest Enhancement in References question value	21

Outcomes	22
Purpose	22
Workflows	24
Why Do we create workflows?	25
Forms Types	25
New Form	25
How to create a workflow?	25
Let me explain to you about this.	26
How to add forms in this blank section	26
Branching	26
Copy & Paste Tree	28
How its works	28
Delete Form & Delete Subtree	29
Forms setting options in workflow	31
Documents pronounce	33
Example:	33
How we can use placeholders in documents	34
Scheduling in Assign Tab	44
Before & Based on Form	47
Before & Based on Patients attributes	48
After & based on From	49
After & Based on Patient Attributes	50
Tasks tab	51
Branching Logics	52
Auto Trigger Forms	52
Multi trigger - Copy paste	53
External Forms	54
How To add external forms in workflow	54
Setting icon with external form	57
Reviewer	58
Email Content	59
Task tab	59
Branching Logics	61
Patients	65
Bulk Upload	65
Admin user activities with Patients section	70
How to assign a workflow to patient	71
Action Columns	72
Additional information	73
Assigned Forms	73
Patient Documents	74

Patient Documents Forms	75
Assigned Forms	76
Tasks	77
How were the tasks created?	78
Staff Members	78
Actions	79
How to create a staff member?	83
Settings	84
Where will these placeholders be used?	87
Company Details	88
Attributes of Treatment plans	89
How will it work?	89
Treatment Field	89
Treatment field for branching	91
How will it work?	91
Treatment Field	92
This can be used with/in	92
Inventory	92
How to Create/Update/Delete inventory ?	92
Inventory Checklist	94
How to create field with multiple/single inventory checklist	94
Staff Members	96
Dashboard	97
Patient CheckIn	97
Patients	99
Assigned Forms	101
Tasks	102
Task Status	104
Pending--->Completed	104
Pending--->Awaiting---->Completing---Overdue	105
Notification/Reminder For Staff members	105

Introduction

This application consists of two types of users.

User Roles

Admin

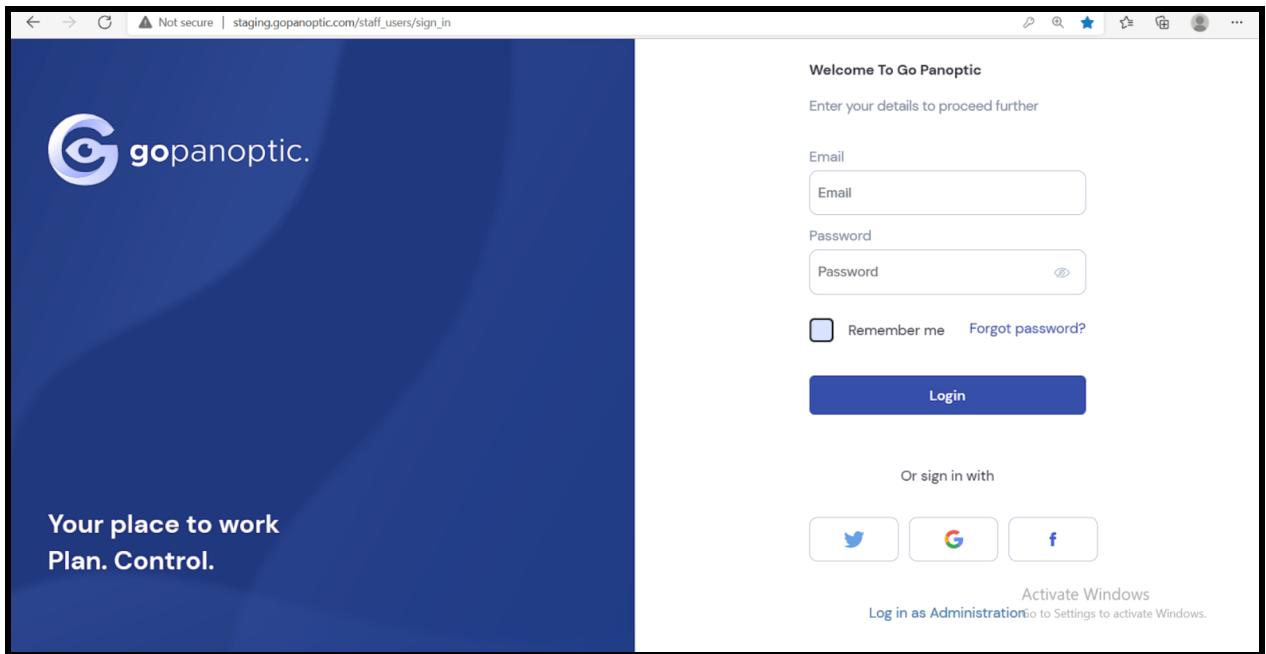
Staff members

Let's see how these users work. What are the activities these users can perform?

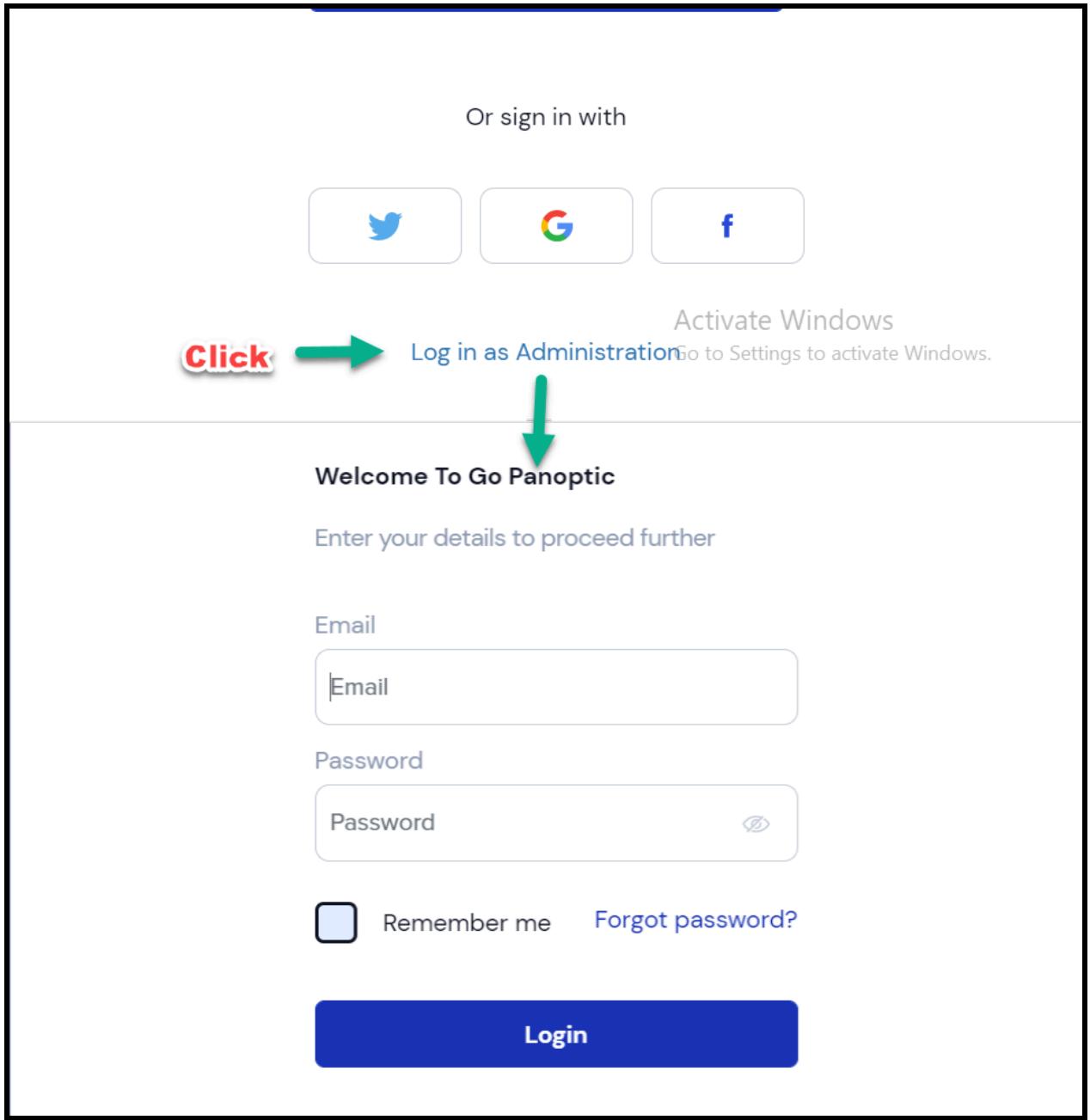
Initially we will discuss all the roles and responsibilities of Admin users in detail and then we will move on to staff members.

Admin user

Admin users can perform all types of activities. The user has all types of rights.
Let's get into it, with the login process [Go Panoptic](#)



On default the above page will be shown, default setting for login user that is enabled is “Staff member”. We can switch the user and can login as admin user by clicking on “**Login as Administrator**”



Now enter the Admin login credential and Click on the “Login” button. The below image that is showing is the first interface that You see after login.

The screenshot shows the Gopanoptic dashboard. On the left is a dark blue sidebar menu with options like Dashboard, Staff Members, Admin Users, Patients, Workflows, Assigned Forms, Forms, Fields (which is selected), Analytics, Tasks, and Settings. The main area has a green header bar with a checkmark and the text "Signed in successfully." It also shows the last modification date as "1 Jul 2021 3:33 AM". The top right corner shows the user "Hassan Hamid". Below the header is a section titled "Dashboard" with four large cards: "47 Total patients being processed", "2200\$ Revenue Generated", "150\$ Average Revenue Generated Per Patient", and "150 Follow-up Opportunities Total Value". Under these cards are three smaller sections: "Patients" (In Progress: 2350.0%, Processed: 150.0%, Active: 100.0%), "Follow-up Opportunities" (See All, Vincent Drake listed), and "Staff Members Efficiency" (See All, Hamza Staff Clinical Staff, 66.67% efficiency). A bottom banner says "Activate Windows Go to Settings to activate Windows".

On the left side the admin menu bar is showing , we will look into every aspect of this menu bar in detail, how it works, what activities we can perform with every menu.

Starting with “Fields”

Fields

The screenshot shows the "Fields" management page. The left sidebar has the "Fields" option selected. The main area is titled "Fields" and contains a table with columns: Name, Category, Type, and Actions. The table lists various fields: First Name (Standard, Text), List of conditions (Custom, Checkbox), date mm (Custom, Date), date time (Custom, Date time), checkbox (Custom, Checkbox), time (Custom, Date time), Did you eat today? (Custom, Checkbox), What did you eat tod... (Custom, Text), Did you like what yo... (Custom, Checkbox), and Why did you not like... (Custom, Text). Each row has edit and delete icons in the Actions column. At the bottom, there are navigation links for pages 1 through 5, and buttons for "Next" and "Last". A banner at the bottom right says "Activate Windows Go to Settings to activate Windows".

Admin users can create different types of fields, fields are used to get input data. We have two Categories of fields.

- Custom : Admin users can create /update/ delete.
- Standard: Admin user can only create.

Lets see how we can create different types of fields.

How to create fields

The screenshot shows the 'Fields' page in the gopanoptic application. On the left is a dark sidebar with navigation links: Dashboard, Staff Members, Admin Users, Patients, Workflows, Assigned Forms, Forms, Fields (which is the active tab), Analytics, Tasks, and Settings. The main area has a header 'Dashboard → Fields' and a sub-header 'Fields'. It includes search, filter, and category selection tools. A table lists ten fields with columns for Name, Category, Type, and Actions. The first field is 'First Name' (Category: Standard, Type: Text). The last field listed is 'Why did you not like...' (Category: Custom, Type: Text). A red arrow points to a blue 'Add New Field' button in the top right corner. A watermark for 'Activate Windows' is visible at the bottom right.

Create Placeholder (toggle)

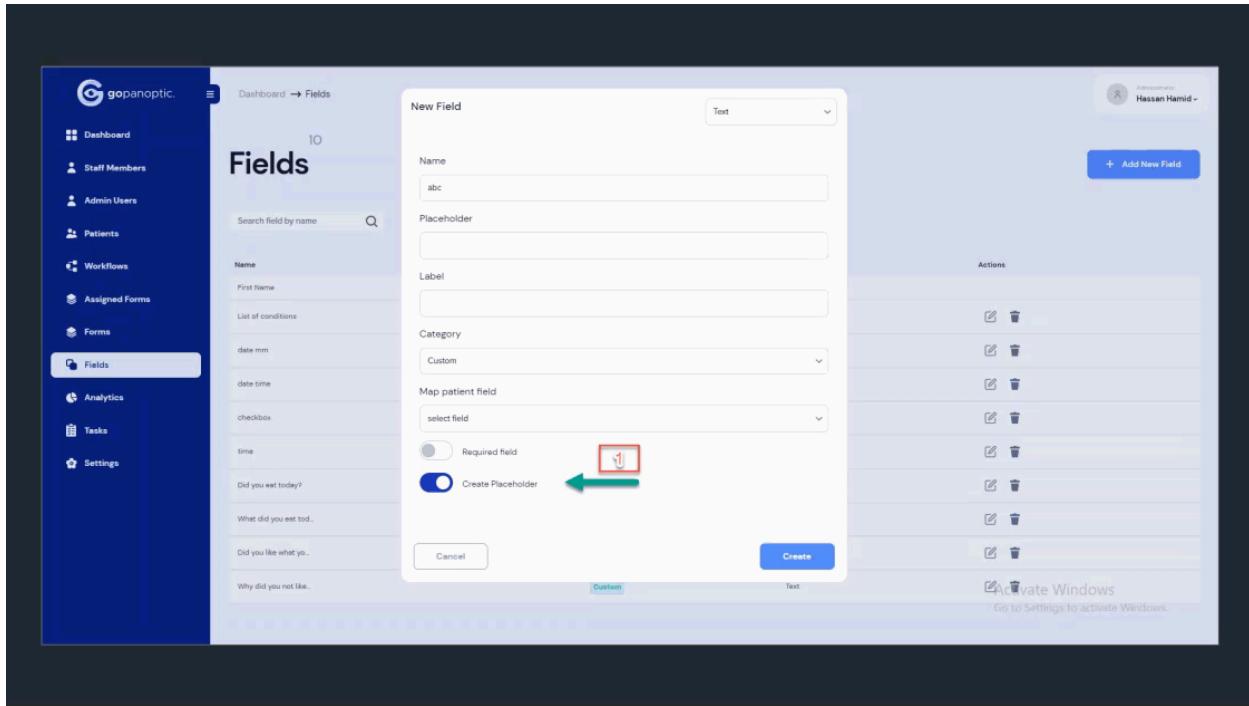
At time of creation of fields , you see above this option.

let 's take a look into this what is the purpose of this place holder toggle option here.

Let's suppose I want to use a particular field for the documentation. For doing this I will create a field, and at the time of creation of this field I will switch this toggle option "On". One more thing we need to do is! we will add this field into the form section.

What will happen?

this field that is included in the form section will act as the part of the placeholder in the settings tab.



Note: How these placeholder will be used in documnet, we will discuss in detail when we are explaining about “Settings”.

Update and delete fields

Admin users can update and delete fields as well, see the two options in the action column.

The screenshot shows the 'Fields' section of the gopanoptic application. On the left is a dark sidebar with navigation links: Dashboard, Staff Members, Admin Users, Patients, Workflows, Assigned Forms, Forms, Fields (which is highlighted), Analytics, Tasks, and Settings. The main area has a header 'Dashboard → Fields' and a sub-header 'Fields'. It includes search and filter tools: 'Search field by name' with a magnifying glass icon, 'Filter by' dropdowns for 'Select Type' (Text, Custom, Date, Number, etc.) and 'Select Category' (Standard, Custom, Temperature, etc.), and another 'Select Form' dropdown. A blue button '+ Add New Field' is at the top right. Below is a table with columns: 'Name', 'Category', 'Type', and 'Actions' (with edit and delete icons). The table contains several rows of field data.

Name	Category	Type	Actions
asad	Custom	Single select	
asadasa	Custom	Single select	
this is text input f...	Custom	Text	
text area field	Custom	Text area	
temp	Custom	Temprature	
abc	Standard	Text	
asad	Custom	Text	

search and filters in fields

Users can search any field by typing the name of the field in the search column, and users can also apply filters to categories the fields.

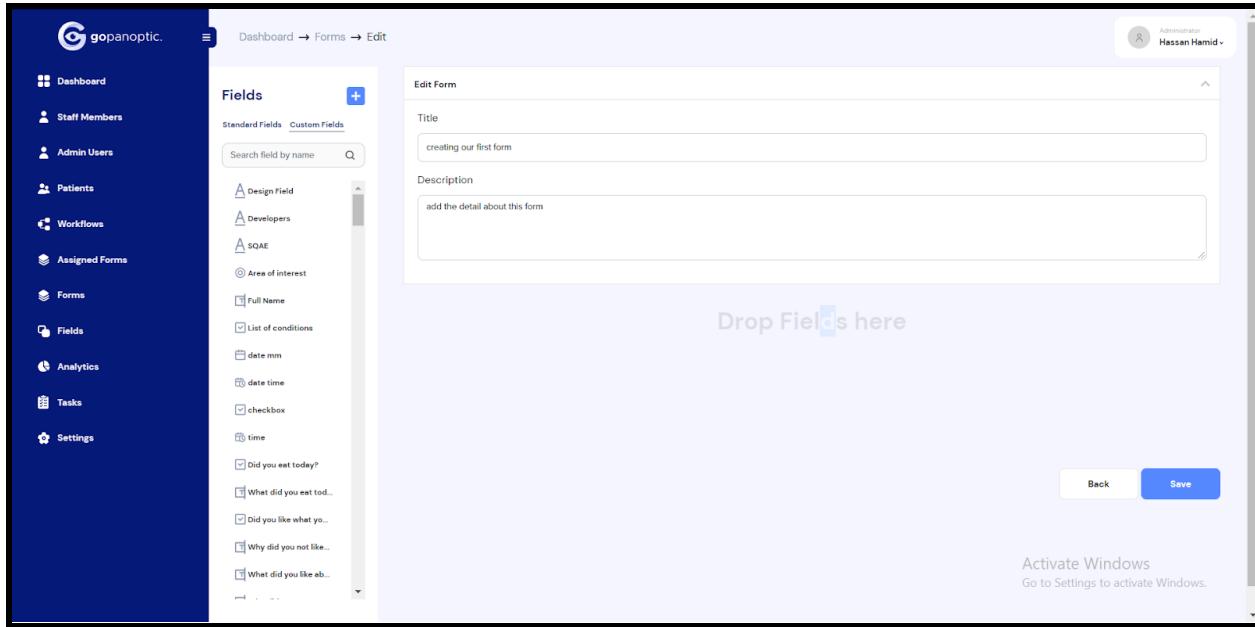
This screenshot shows the search results for the term 'asad' in the 'Fields' section. The search bar at the top contains 'asad'. The table below has columns: 'Name', 'Category', 'Type', and 'Actions'. One row is visible, showing 'asad' in the Name column, 'Custom' in the Category column, 'Text' in the Type column, and edit and delete icons in the Actions column.

Name	Category	Type	Actions
asad	Custom	Text	

Forms

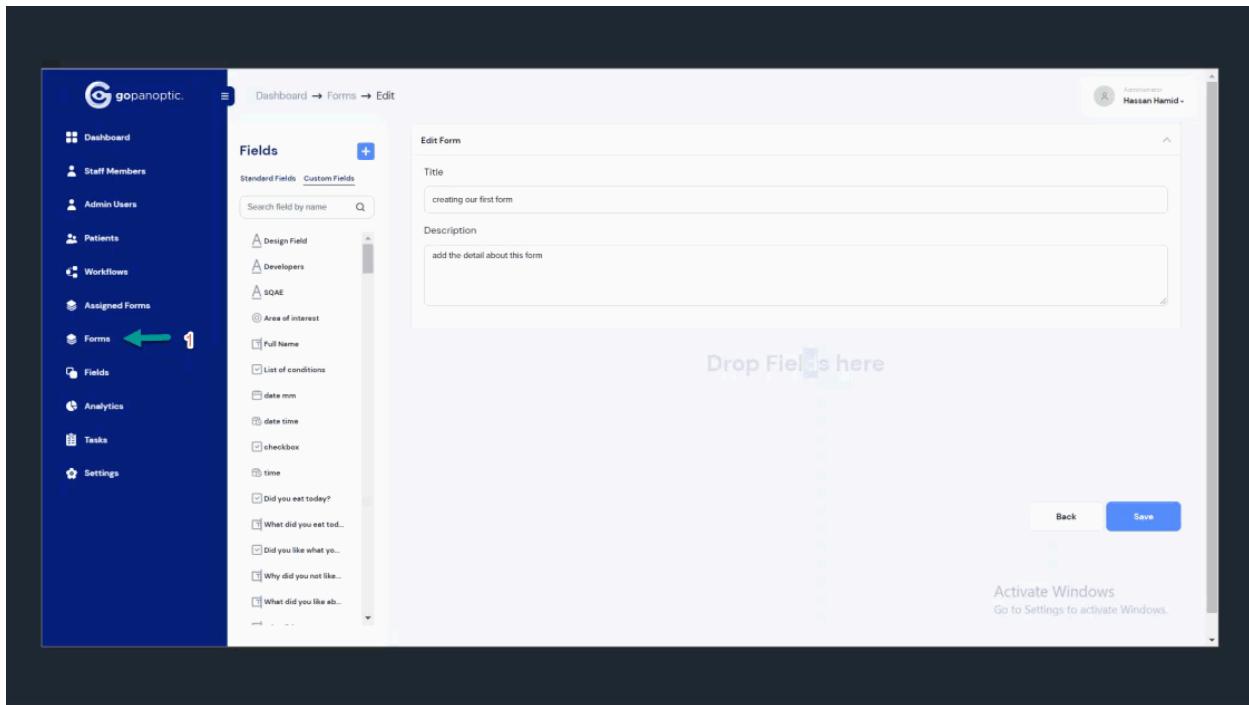
Forms are the combinations of fields(custom+standard). We can also create new fields and add those fields into the form section.

We can create a form by adding fields into the form section.



We just need to follow the below steps to create a form.

- Click on forms in the sidebar menu.
- Add Title and description.
- Drag and Drop the fields into the form section.
- Click on the save button.



How can we edit/update the fields in the form section?

The screenshot shows the gopanoptic software interface. On the left is a dark sidebar with various menu items: Dashboard, Staff Members, Admin Users, Patients, Workflows, Assigned Forms, Forms, Fields, Analytics, Tasks, and Settings. The main area is titled "Dashboard → Forms → Edit". It shows a list of fields: First Name and abc. Below this is the "Edit Form" section with fields for Title (containing "creating our first form") and Description (containing "add the detail about this form"). A red arrow labeled "1" points to the "Edit" button next to the "Full Name" field. The "Full Name" field has a placeholder "Client Full Name" and a text input box containing "enter your full name here". At the bottom right of this section is a "Configure" button. In the bottom left corner of the main area, there is a modal titled "Edit Field" with the following fields: Name (Full Name), Placeholder (enter your full name here), Label (Client Full Name), Map patient field (select field dropdown), Required field (switched on), Create Placeholder (switched off), and a "Cancel" button. A green arrow labeled "2" points to the "Update the fields" link in the modal. A red arrow labeled "3" points to the "Update" button in the modal.

how we can configure our fields.

To do this , we should have a field in the edit form section , and upon that field this option must be shown, as shown in the below screenshot.

The screenshot shows the gopanoptic software interface. On the left is a dark sidebar with various menu items: Dashboard, Staff Members, Admin Users, Patients, Workflows, Assigned Forms, Forms, Fields, Analytics, Tasks, and Settings. The main area is titled 'Fields' and contains a search bar and two tabs: 'Standard Fields' and 'Custom Fields'. Below these are sections for 'First Name' and 'abc'. A large text input field says 'add the detail about this form'. Underneath are several form fields: 'Full Name *' (with 'Client Full Name' below it), 'Area of interest', 'Working area', 'SQAE', and 'Describe about SQAE'. Each field has a 'Configure' and 'Edit' button. A green arrow points to the 'Configure' button next to the 'Area of interest' field.

After clicking on this option , a side modal will appear.

This screenshot is similar to the previous one, showing the form configuration screen. However, a side modal is now open on the right. The modal has a header 'Rules for Area of interest' and a 'Skip Question' button. It contains a 'Name' section with the text 'if we select the SQAE then other tw'. Below this are four buttons: 'New Task', 'Add Narrative', and 'New Outcome Logic'. A green arrow points to the 'Rules for Area of interest' section in the modal. The main form fields are visible in the background.

As we can see in the above modal there are four basic options.

- Skip Question
- New task
- Add Narrative
- New customer Logic

Skip Question

If we click on this option, a pop up modal will appear for that particular field we are going to configure. See below

Add skip question rule for Area of interest X

Name

Question value

Questions list

Close Save

Purpose

If we select a question value , then selecting that question value , a particular question list will disappear.

Add skip question rule for Area of interest ×

Name

Select a question value upon that the question list option should disappear

Question value

Developer ▼

Questions list

✖ Design Field✖ SQAE

CloseSave

New task

If we click on this option, a pop up modal will appear for that particular field we are going to configure. See below

Add new task for

X

Title

Description

Staff User

Please select Staff User



Number of days for due date

1

Question value

Please select Question Value



Close

Save

Add new task for X

Title
A task will be generated for the staff member

Description
if we select "Question value" , then a task should be created for a particular Staff member to Do.

Staff User
Mian Asad

Number of days for due date
1

Question value
Developer

Close Save

Purpose

Let suppose we have placed a logic that if our patient , select the “**Question value = Developer**”. In this case our system should create a task for a “**staff user= Mian Asad**”.

Add Narrative/References

Purpose

When the document is available for download and we want that instead of printing the selected value from the field we want to print out customized value/reference then we use this option in the field section.

Fields that have this option?

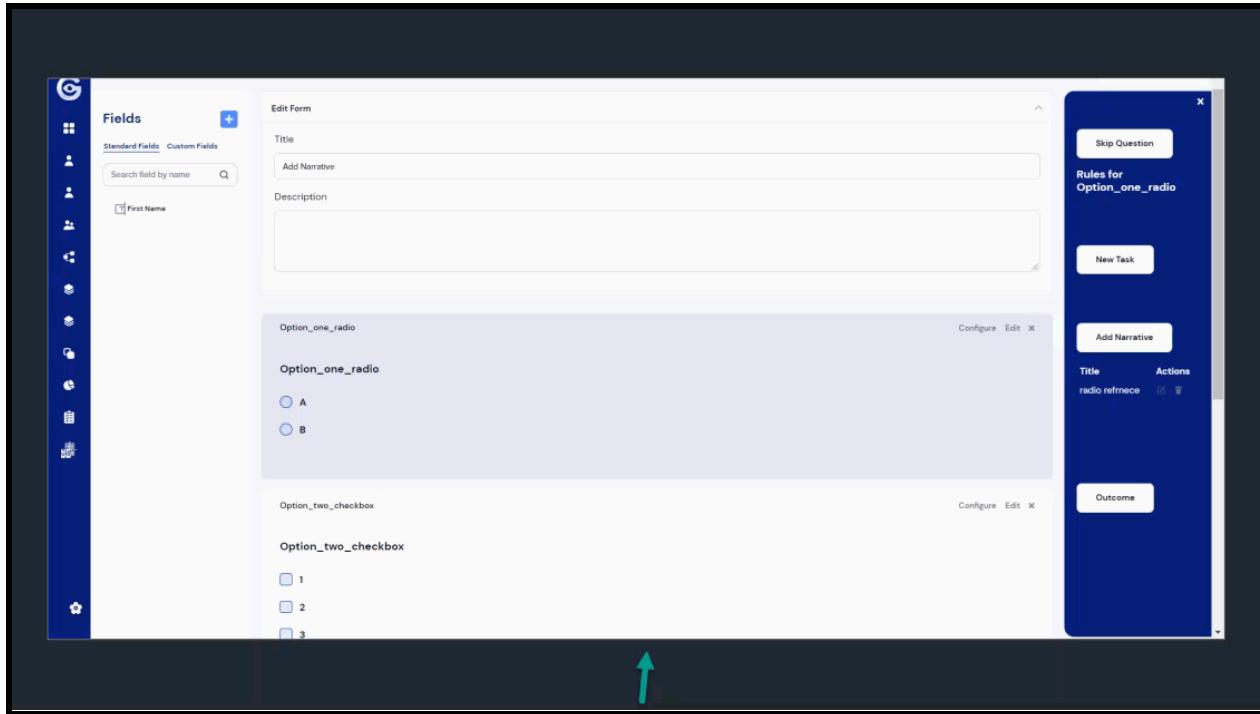
- Radio
- Checkbox
- Single Select
- Multiselect

How to add reference/narrative ?

Note: The above field placeholders must be created.

Follow the below steps

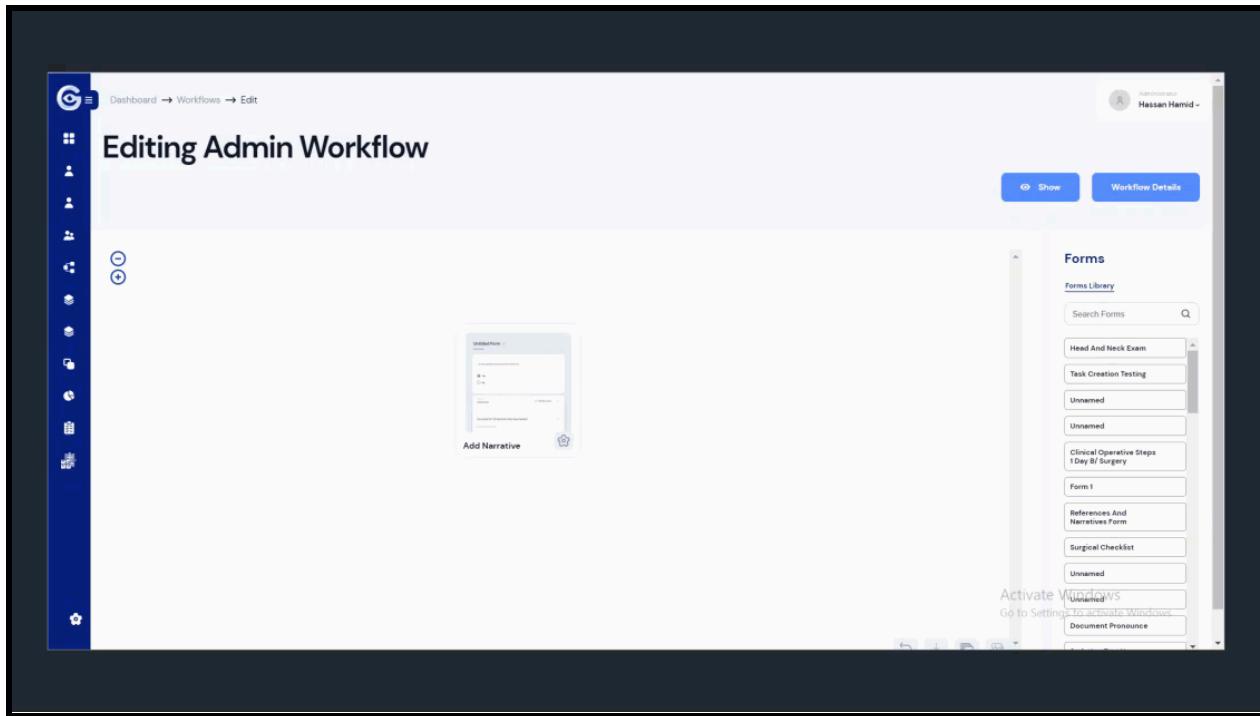
1. Add a new form.
2. Add above fields/or any one of the above fields into the form.
3. Click on Configure Option.
4. Click on Add Narrative.
5. A pop up modal will appear.
6. Add detail into the editor section, select the value , add reference against that value.
And click on the save button.



In this way You can create a reference for above fields

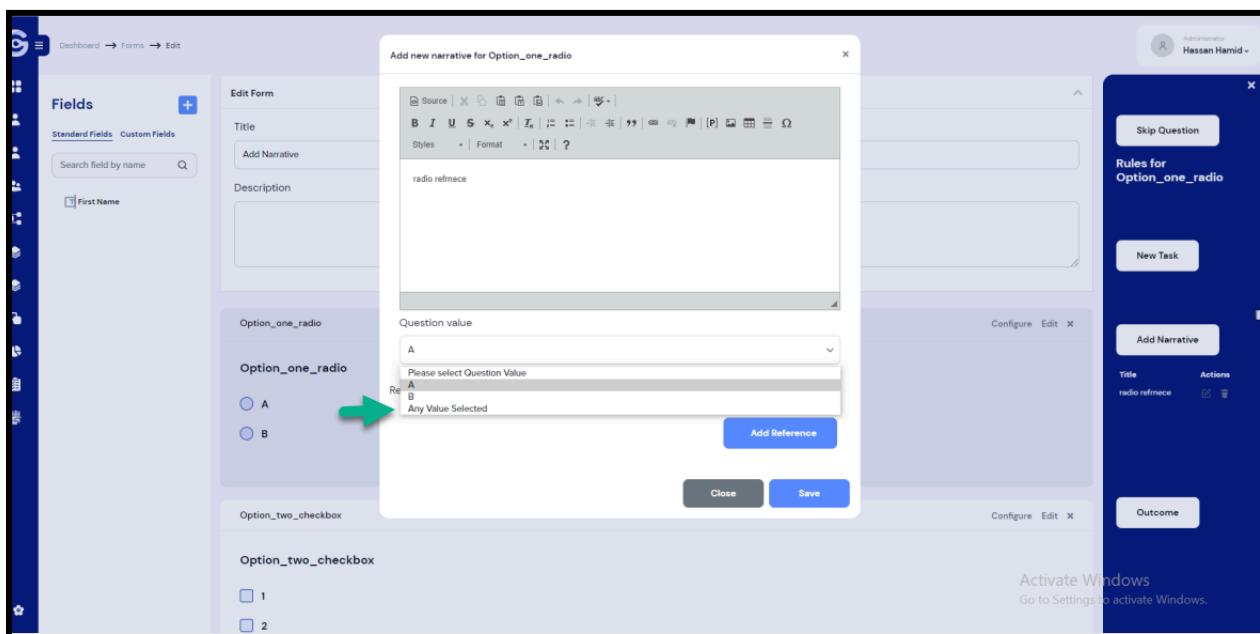
How will the references be Printed?

1. Go to workflows
2. Create a new workflow.
3. Add the form that has references fields.
4. Click on Documents.
5. Enter the name of doc, priority, Select the reviewer (staff member)
6. In the editor section add the detail if you want , and here add the placeholder of fields that contain references.
7. Assign the workflow to a patient.
8. Login with a staff member and submit the form by selecting those values which contain references. And submit the form.
9. A document task will be created for a staff member.
10. Login with that staff member and go to tasks.
11. Here you will see the document that you have created in Your workflow.
12. Click on complete task.
13. A pop up modal will appear , and here you can see the references that you have added for selected value for different fields.



Latest Enhancement in References question value

To facilitate our customer we have updated a default generic option in question value.
That is
Any Selected Value



If a staff member will select this option for a patient, and add reference against this option. Then at the time of form submission , for this field which value will be selected, the references will be printed.

Outcomes

Purpose

Outcomes are generated on selection fields values/Question values(single select,multiselect,checkbox,radio buttons options).on the basis of these selecting values we decide which outcomes our patient wants to prefer. We do this to categorize the patient status after selecting the particular value.

If we click on this option, a pop up modal will appear for that particular field we are going to configure. See below

Add New Outcome Logic Against Area of interest

Outcome

Please select Staff User

Question value

Please select Question Value

Close Save

We have following 3 types of outcomes (by default)

- Accept treatment.
- Rejected Treatment.
- Follow-up Patient.

We can select one outcome against one question value. And selecting a particular question value , a particular outcome will be displayed for the forms.

Note - New outcomes can be added from the clinic settings page.

Add New Outcome Logic Against Area of interest X

Outcome

Accepted Treatment ▼

Question value

SQAE ▼

Close

Save

Add New Outcome Logic Against Area of interest X

Outcome

Rejected Treatment ▼

Question value

Developer ▼

Close

Save

Add New Outcome Logic Against Area of interest X

Outcome

Follow-up Patient ▼

Question value

Designer ▼

Close

Save

When our particular user /staff member will complete the assigned forms, and will select the above values , then outcome status will be displayed in the patient assigned workflow side, as shown below.

The image displays two identical-looking user interfaces for managing patient forms, presented vertically. Both interfaces have a header 'Doc Workflow' on the left and a status indicator on the right. A large green arrow points from the top status to the bottom one, indicating a transition or comparison between the two states.

Top Screenshot (Accepted Treatment):

- Header: Doc Workflow
- Status: Accepted Treatment
- Section: All Forms:
- Form Preview:
 - Title: Creating Our First Form
 - Assigned to: Asad Mian
 - Due Date: 2 Jul 2021 12:00 AM
- Buttons:
 - Assign
 - View Data
 - Download Form

Bottom Screenshot (Rejected Treatment):

- Header: Doc Workflow
- Status: Rejected Treatment
- Section: All Forms:
- Form Preview:
 - Title: Creating Our First Form
 - Assigned to: Asad Hussain
 - Due Date: 2 Jul 2021 12:00 AM
- Buttons:
 - Assign
 - View Data
 - Download Form

Workflows

Workflow is a combination of multiple forms. We can add multiple forms in a workflow and split the form on the basis of logics.

The screenshot shows the 'Workflows' section of the gopanoptic software. The left sidebar has a dark blue background with white text and icons. It includes sections for Dashboard, Staff Members, Admin Users, Patients, Workflows (which is highlighted), Assigned Forms, Forms, Fields, Analytics, Tasks, and Settings. The main area has a light blue header with the title 'Workflows' and a sub-header '12'. Below this is a search bar with placeholder text 'Enter Title to find existing...' and a magnifying glass icon. There are two filter dropdowns: 'Filter by' and 'Select Status'. The main content area displays four workflow cards:

- lucky**
Forms: hamza nd asad
Status: Active
- Test- 22/06/21**
Forms: Head And Neck Exam, New Patient Paperwor...
Status: Active
- Fever Patient Workfl...**
Forms: Fever
Status: Active
- Hamza Medicare Clini...**
Forms: Dr. Imran Bashir, Dr Amjad Hussain, Dr. Oazi abdul samad
Status: Active

A blue button labeled '+ Add' is located in the top right corner of the main content area.

Why Do we create workflows?

The reason is that we want to process our data in a systematic way. That's why we create workflow , so the information that is being processed , should be in sequence.

Forms Types

New Form

External Form

Let's get into the detail of these forms, how these forms we can add in a workflow , and what are their functionality.

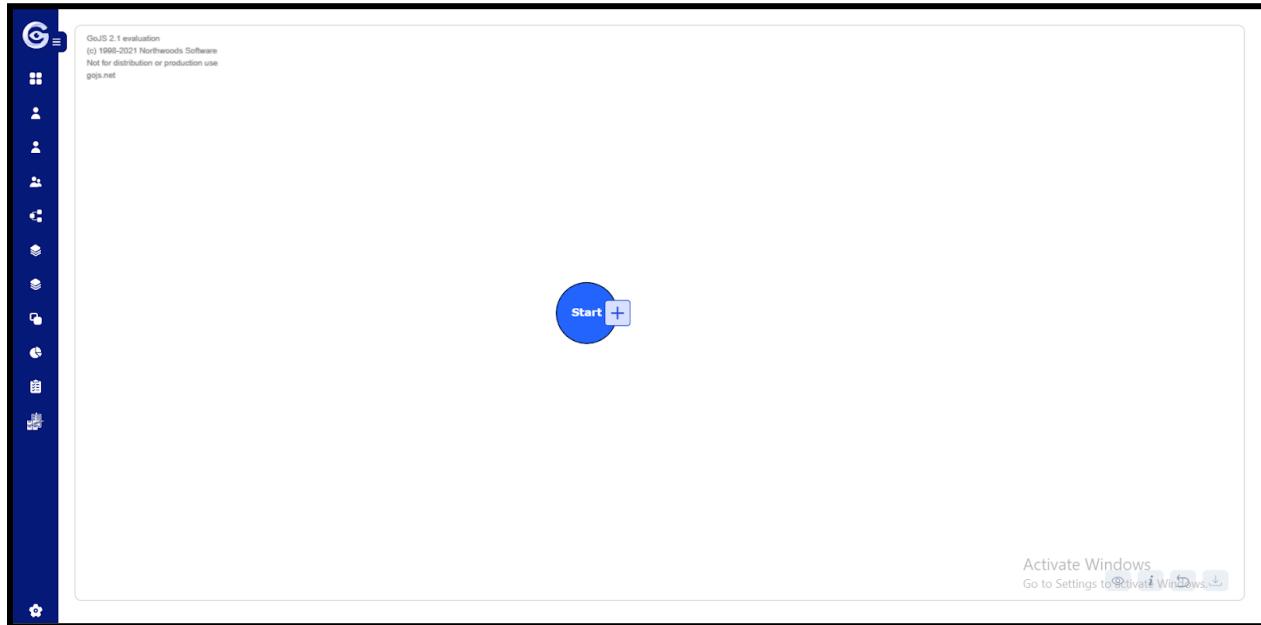
New Form

How to create a workflow?

For creating a workflow just follow the below steps

- Go to the workflow section , by clicking on workflows inside the menu bar.

- Click on the **+Add** button.
- The first interface you will see after clicking on the above button is shown below.

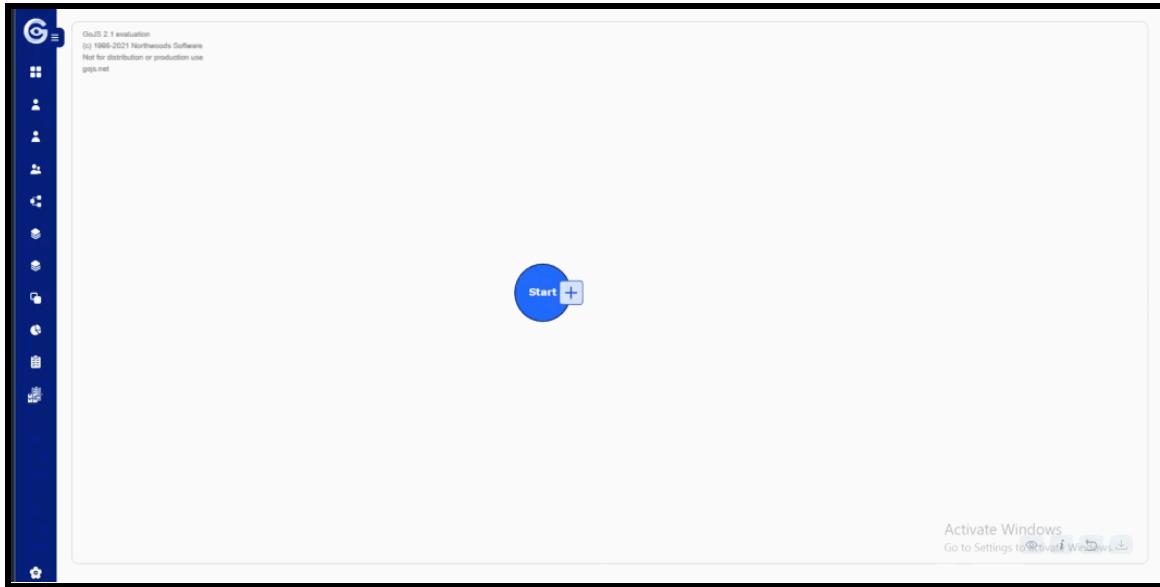


Let me explain to you about this.

As you can see above currently a blank page is showing, in this page you can add form either simple/external forms.

How to add forms in this blank section

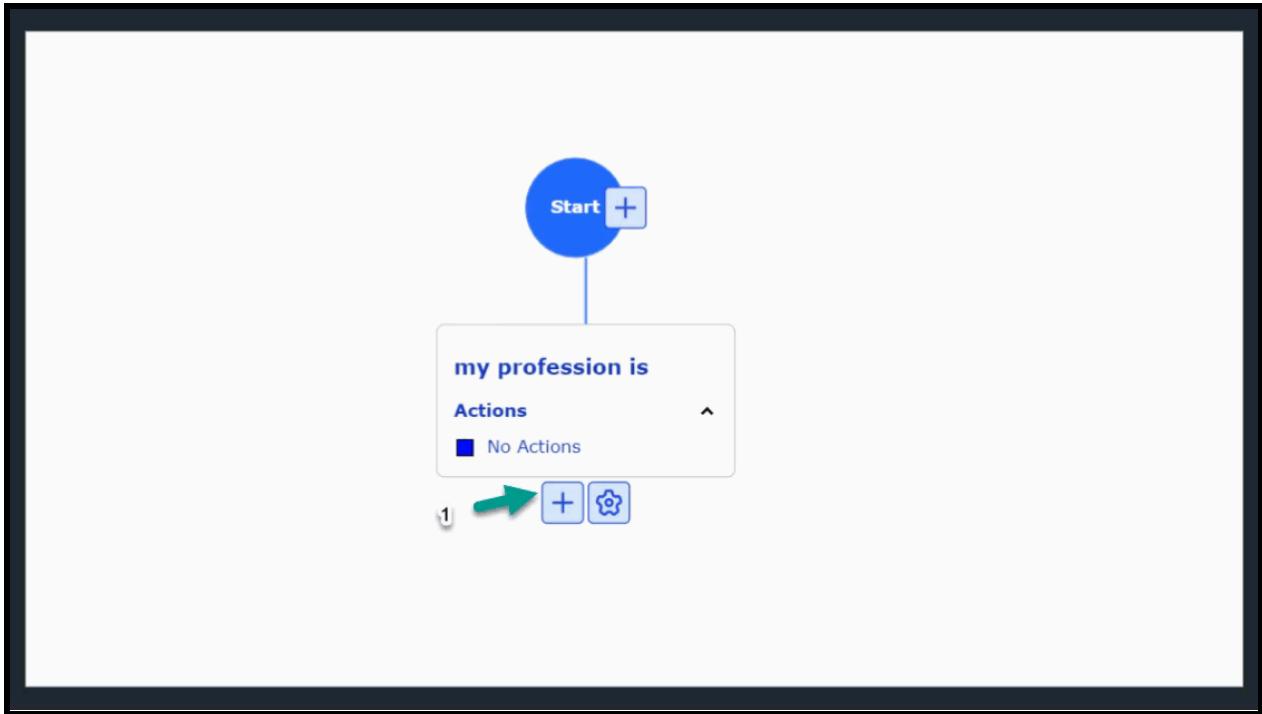
- Click on Plus sign with start and it will open a side modal.
- Select A form (New Form/External Form).
- Click on the Create button at the bottom of this side modal.



Branching

If creating a branching in forms follow the below steps.

- Click on + sign showing below the first form.
- Select a new form and it will be added in a linear way.
- Now click again on + sign showing below the first form.
- It will open a side modal , click on the new form button.
- Now here you will select the new form (name,branch,Question, Value). Then you will select the same options for the old form .
- Once you made your all selection , click on the create button.



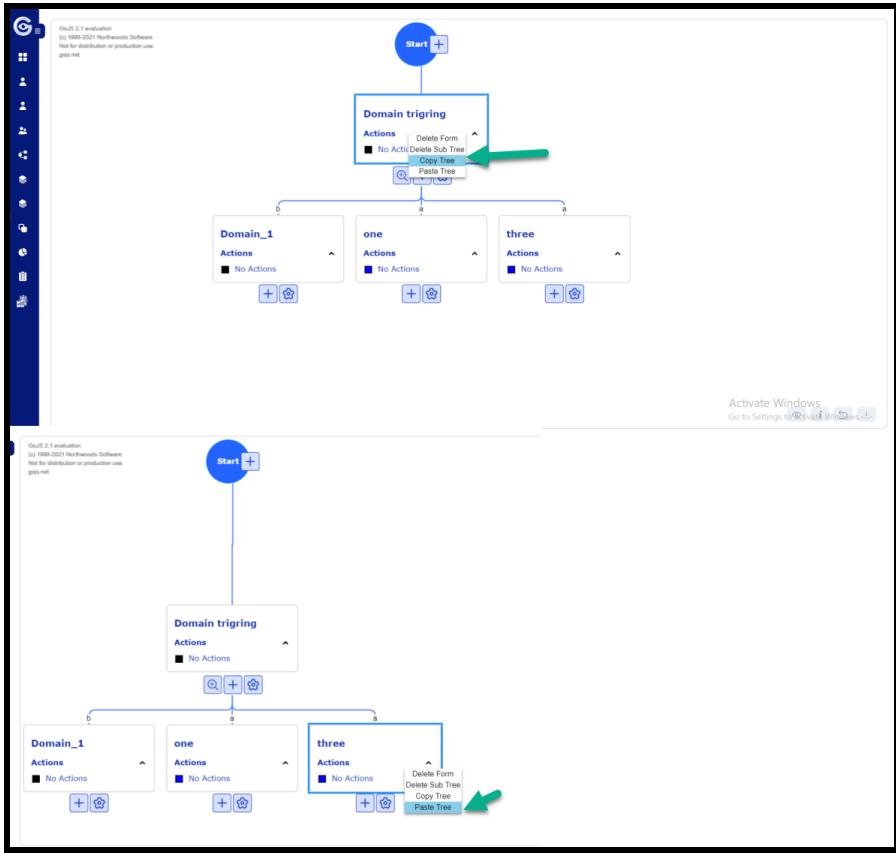
Copy & Paste Tree

introduction

As you can see in the branching section , it looks like a tree having branches (sub forms). If you right click on the main form having branches , it will show you different options (copy tree, paste trees, Delete Form, Delete subtree).

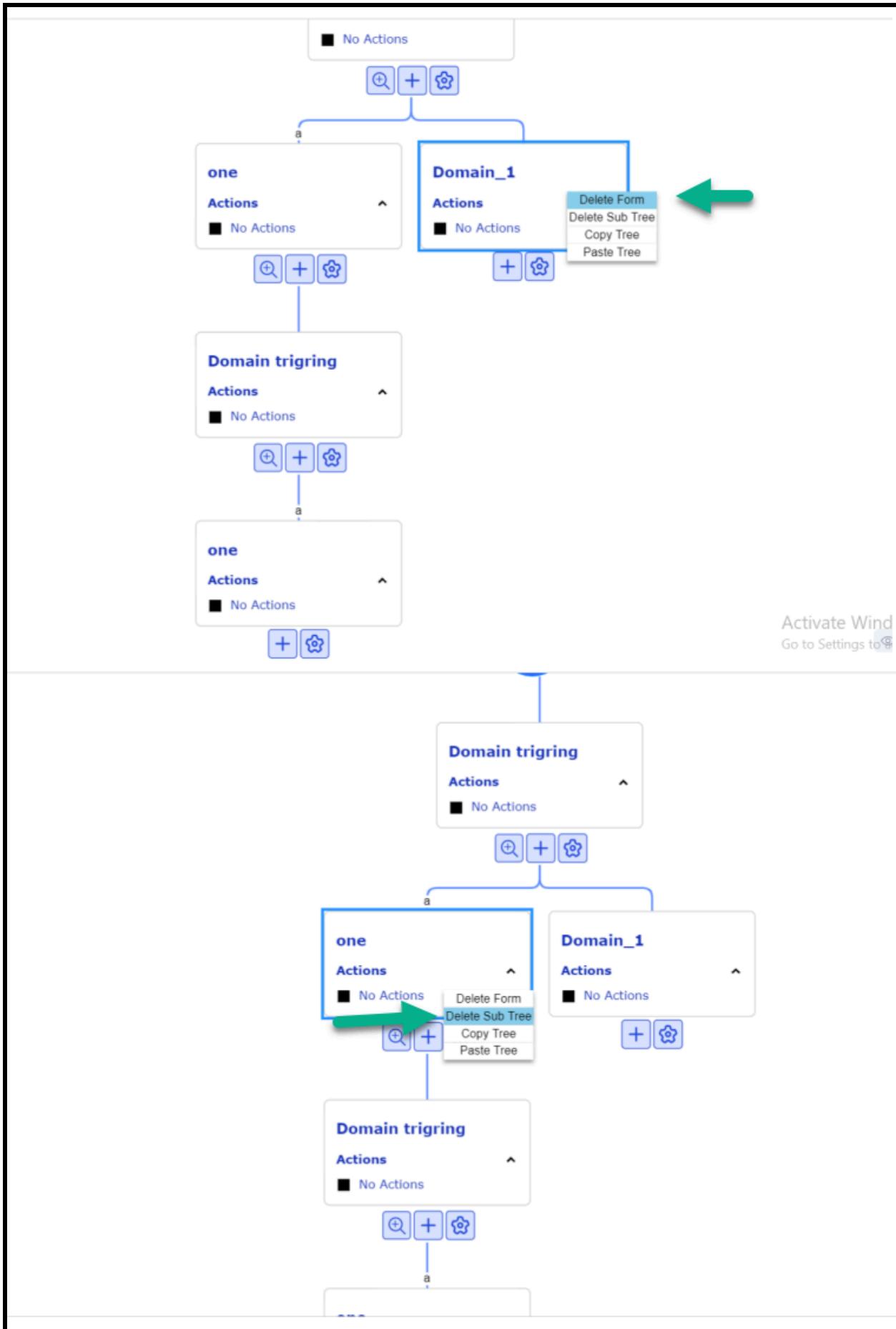
How its works

- Click on form having subtree
- Click on copy tree
- Click on paste tree where you want to paste
- After that you will see all the copy forms showing below the forms where you paste it.

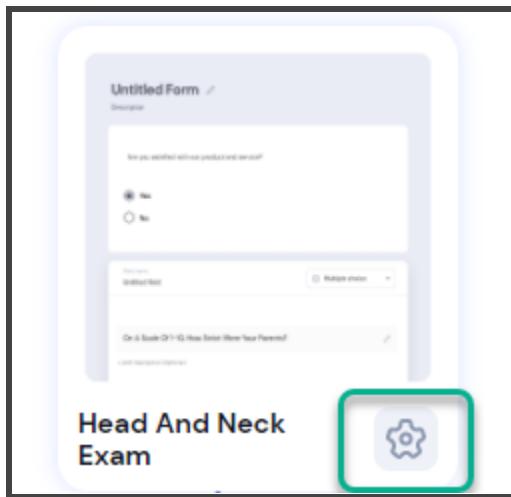


Delete Form & Delete Subtree

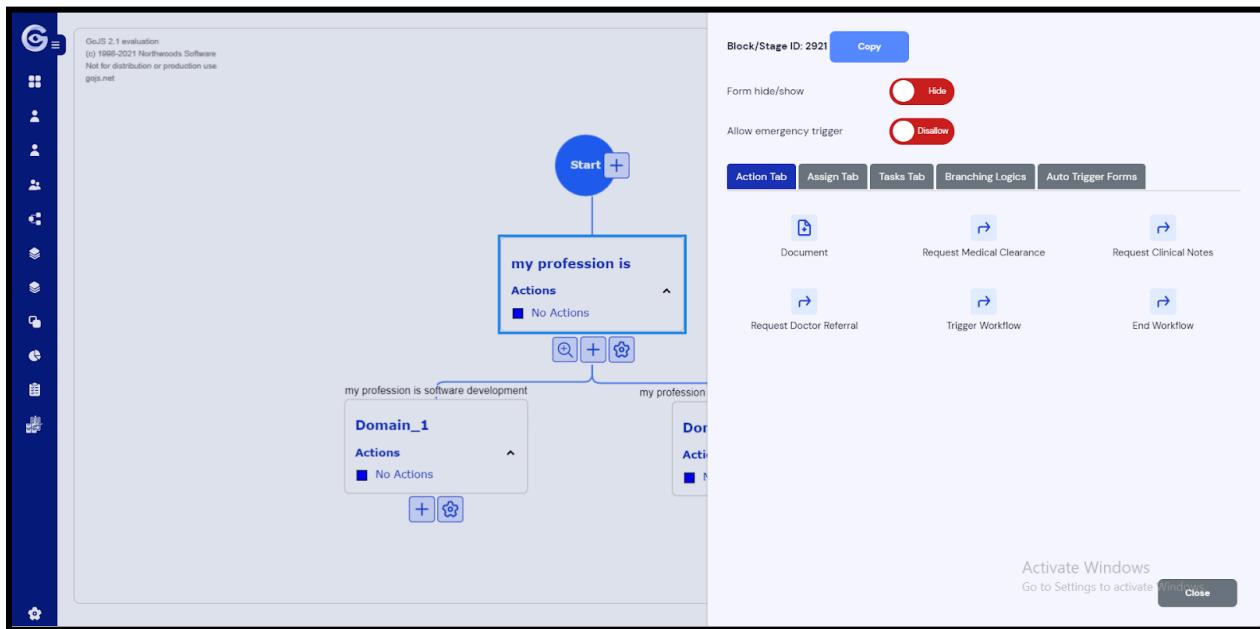
You can delete an individual form , or multiple by selecting forms, and clicking on sub Delete form and delete tree option as well.



Forms setting options in workflow



When you click on this , it will open a side modal for you having some tabs and actions



Block Stage ID: this is showing the id of the current form, you can copy this id as well.

Form hide/show: on default this toggle option will be off, if you turn this on , when staff members fill this for a patient , all the information will be shown in the patient document section of this form.

The screenshot displays two main sections of the GoPanoptic application.

Top Section (Workflow Editor):

- A GoJS 2.1 evaluation watermark is visible in the top-left corner.
- The interface shows a workflow diagram with a "Start" node connected to a "Domain triggering" node.
- The "Domain triggering" node has an action labeled "my profession is" which points to a "my profession is" form.
- The "my profession is" form has an action labeled "additional form" which points to a "27-aug-2021" form.
- On the right side of the workflow editor, there are buttons for "Copy", "Show" (with a green arrow pointing to it), and "Disable".
- Below these buttons are tabs: Action Tab, Assign Tab, Tasks Tab, Branching Logics, and Auto Trigger Forms.
- Under the tabs, there are icons for Document, Request Medical Clearance, Request Clinical Notes, Request Doctor Referral, Trigger Workflow, and End Workflow.

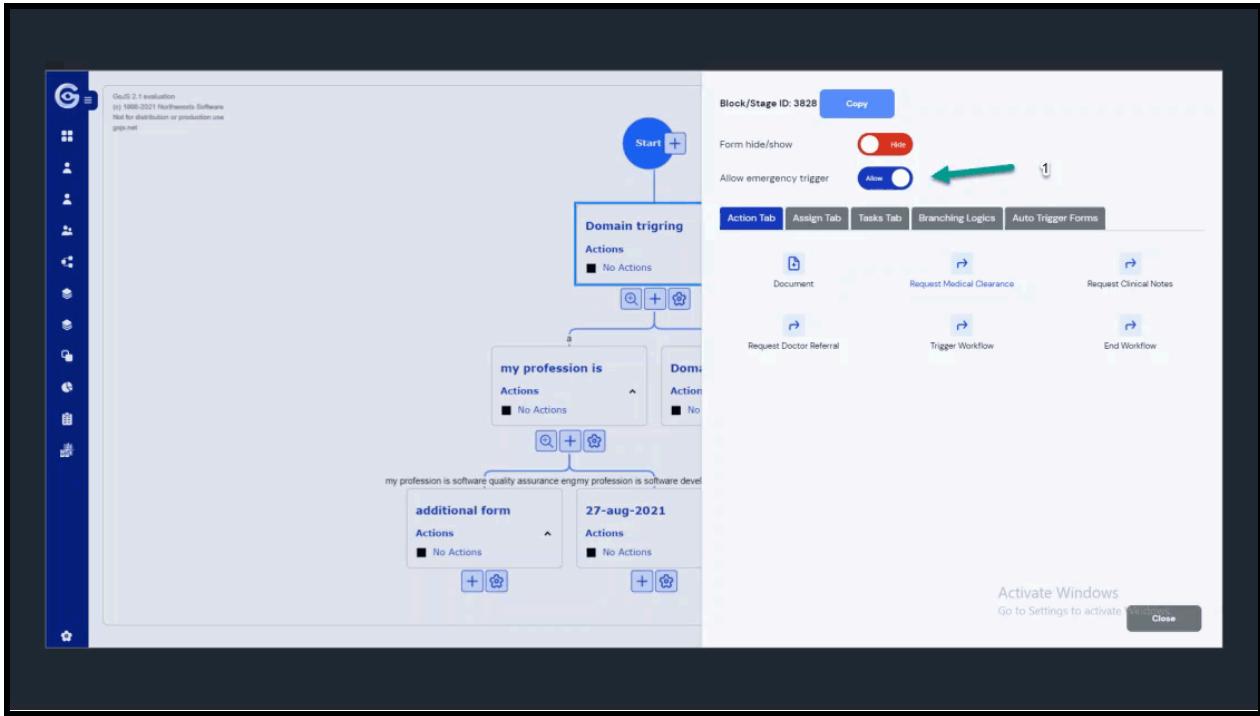
Bottom Section (Patient Profile):

- The header shows the user's name: Aleshia Tomkiewicz.
- The profile picture and "Patient" status are displayed.
- Basic patient information is listed: Name, Email, Phone Number, Sedation Consultation Date, Sex, Status, Surgery Date, and Treatments.
- The "Patient Documents" tab is selected, indicated by a blue underline.
- A table lists submitted forms:

Document Type	File Name	Upload Date	Actions
my profession is	Form-my profession is.pdf	14 Nov 2021 at 11:50:29 AM	(eye icon)
my profession is	Form-my profession is.pdf	14 Nov 2021 at 12:36:18 PM	(eye icon)
my profession is	Form-my profession is.pdf	24 Nov 2021 at 6:08:32 PM	(eye icon)
Action Document	asad f - Document	24 Nov 2021 at 6:08:31 PM	(eye icon)
- An "Activate Windows" message is displayed at the bottom right.

If the user clicks on the “eye” icon in the action column it will be downloaded , and the user can see the submitted details of that particular form.

Allow emergency trigger: on default this toggle option will be off, if you turn this on, when the staff member will fill the patient form , it will show this button to staff member , and through side modal staff member directly triggers any form for next.



1. Action Tab
2. Assign tab
3. Tasks tab

These 3 tabs have different options , let's discuss them in detail.

1.1: Document

When you click on this it will show you a side modal.

Add a name, Select priority andReviewer and add your document in editor sections and save it.

Add action for My Profession Is

Priority
Medium

Reviewer
Todd Paul

Name
first doc

Source | | | ABC |

B I U S x_a x^a | | | , | | [P]

Styles | Normal | | ?

this is our first form|

body p

Documents prononcés

Purpose:

If the patient is male and at the time of creation of document the admin user created a document and mention their multiple times as female , then when this document will be available for download and in pdf form then it will change the pronunciation w.r.t patient gender.

Example:

Admin users write following points in the document section.

1. She needs to fill up this form.
2. She needs to take her medicine at the proper time.
3. Ms. If you face any serious issue, then you can contact us at any time.

After the generation of document it will be change into

1. He needs to fill up this form.
2. he needs to take her medicine at the proper time.
3. Ms. If you face any serious issue, then you can contact us at any time.

The screenshot displays a medical software application with a dark-themed interface. On the left, a vertical sidebar contains icons for navigation and user management. The main area is divided into several windows:

- Editing Admin**: A modal window titled "Add action for Form 1" shows a rich text editor with a toolbar. The text area contains three bullet points: "She needs to fill up this form.", "She needs to take his medicine at the proper time.", and "Ms. If you face any serious issue, then you can contact us at any time.".
- Forms**: A sidebar listing various forms such as "Head And Neck Exam", "Task Creation Testing", and "Form 1".
- Patient Checkin**: A window showing a "Tasks" list with items like "Review document pronounce" and "Download".
- Document - document pronounce**: A detailed view of the document with sections for "Original Version" and "Edited Version", both containing the same three bullet points. It includes a "Download" button and a "Close" button.
- Action**: A sidebar with buttons for "Complete Task" and "Patient Information".
- System Status**: A bottom right corner displays a message: "Activate Windows Go to Settings to activate Windows."

Note: in some of the cases Note: This may not apply on. formated text. Such as bold, italic etc.

How we can use placeholders in documents

To do this follow the below steps.

- Go to settings and create a placeholder.
- In the above document Edit section, add detailed text if you want to add and then add reviewer. include these brackets [[Form Name.Field name]]. Save it.
- Login with a staff member.
- Complete the assigned form.
- Go to tasks .Click on Complete task.
- On pop up modal down you will see the data gets prepopulated of filled form for pdf.
- Download the original version/ edit the document and download the edited version.

The screenshot shows the 'placeholders' section of the gopanoptic software. The left sidebar has a dark blue background with white icons and text for various modules: Dashboard, Staff Members, Admin Users, Patients, Workflows, Assigned Forms, Forms, Fields, Analytics, Tasks, and Settings (which is highlighted with a white background). The main area has a light gray background. At the top, there are tabs: 'placeholders' (which is blue and underlined), Roles, Company Detail, Application Headers, and Patient Documents List. Below the tabs is a blue button labeled '+Add placeholder'. A search bar contains the text 'F_A_p'. To its right are 'Filter by' and 'Select Model' dropdowns. The main content area is titled 'Placeholders3' and contains a table with three rows. The table has two columns: 'Attribute Name' and 'Action'. The rows are:

- f_a_p.full_name
- f_a_p.your_age
- f_a_p.select_your_profession

Each row has a small trash can icon in the 'Action' column. At the bottom right of the main area, there is a message: 'Activate Windows' and 'Go to Settings to activate Windows.'

We can also create a document in another way. Let's See how we can do this.

The screenshot shows the 'Workflows' page in the gopanoptic.com admin interface. The left sidebar has a dark blue background with white text and icons. The 'Workflows' option is highlighted with a red circle labeled '1'. The main content area shows a list of workflows under 'Doctors hospitals' and 'Forms'. A search bar at the top has 'doctors' typed into it, with a red circle labeled '2' above it. A dropdown menu is open over a workflow item, with a red circle labeled '3' above it. The menu options are: View, Edit, Delete, Patient Documents, and Deactivate. A red circle labeled '4' is on the 'Patient Documents' option. At the bottom right of the main area, there is a message: 'Activate Windows' and 'Go to Settings to activate Windows.'

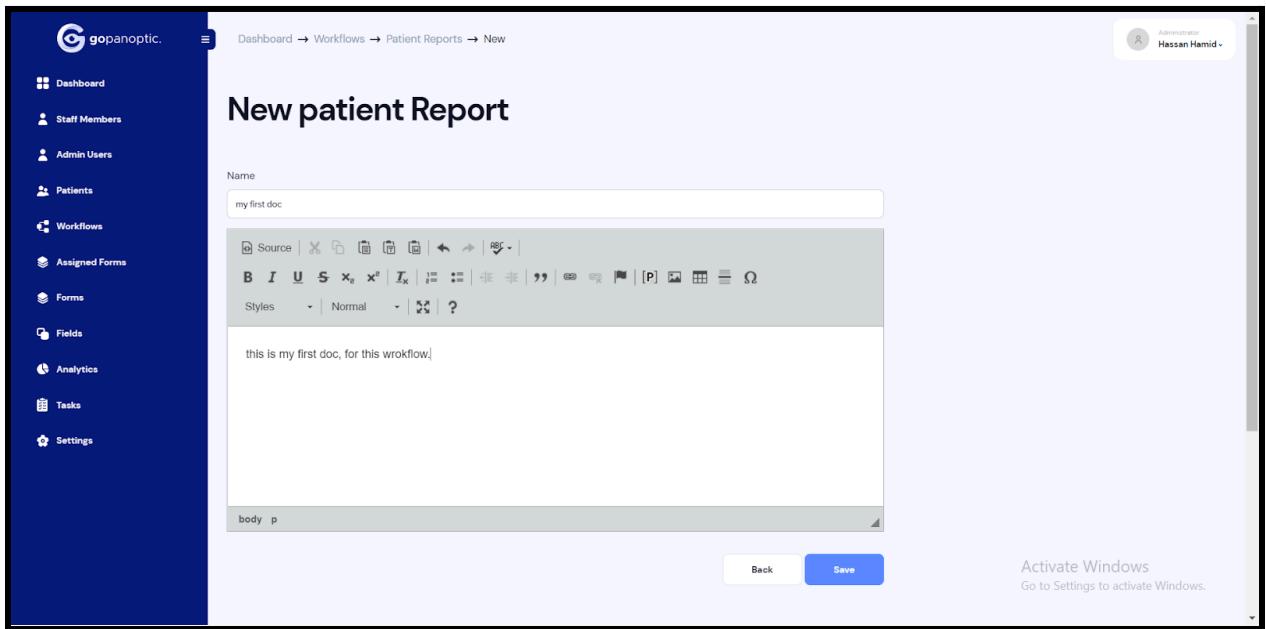
- Click on workflows.
- In the search field type the name of your workflow.
- Click on ... option.
- Click on “Patient Document”.

After doing the above steps you will see the document creation.

The screenshot shows the 'Patient Documents' page in the gopanoptic.com admin interface. The left sidebar is identical to the previous screenshot. The main content area has a header 'Patient Documents' with a search bar below it. There is a table with columns 'Document Name' and 'Action'. A blue button at the top right says '+ Add patient Document'. A red circle labeled '5' is on this button. At the bottom right, there is a message: 'Activate Windows' and 'Go to Settings to activate Windows.'

Click on the “+ Add patient document” button.

Enter the name, detail and click on the save button.



Request Medical Clearance

When you click on this a side modal will appear, enter the name and select a reviewer & priority.

A side modal window titled "Add action for My Profession Is". It has three input fields: "Name" with the value "Request medical clearance letter", "Reviewer" with the value "Todd Paul", and "Priority" with the value "Medium". At the bottom are "Close" and "Save" buttons.

What will happen after doing the above activity?

- A notification for this task will be generated to the above reviewer/staff member.
- When this staff member will click on “Assigned Forms”
- This staff member can see his all assigned form, and as well latest forms.
- The staff member will click on “Complete Task”.
- A form will appear and this staff member will fill this form.
- And click on the “Submit” button.

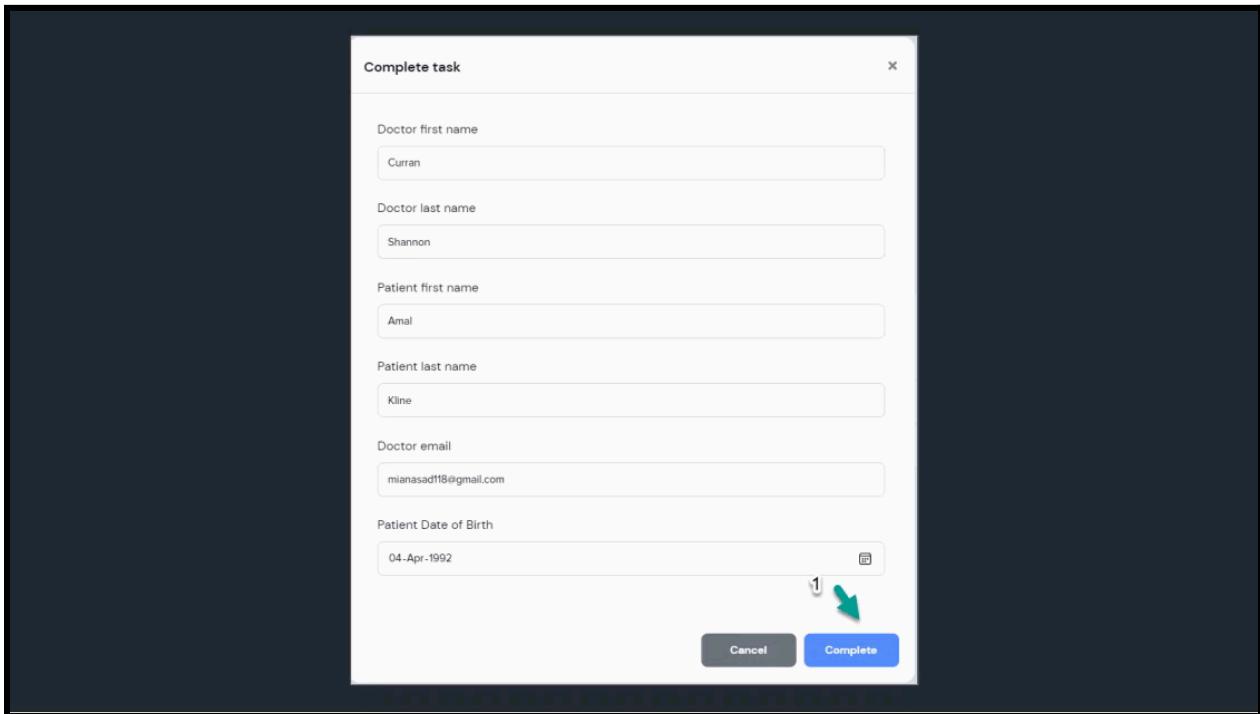
The screenshot shows the Patient Checkin dashboard. On the left, there's a sidebar with user profile (Asad Mian) and navigation links (Dashboard, Patient Checkin, Patients, Assigned Forms, Tasks). The main dashboard area has two large numerical displays: '225' (Total patients being processed) and '2200\$' (Revenue Generated). Below these are sections for 'Patients' (a donut chart showing 60% In Progress), 'Follow-up Opportunities' (a table with columns Name, Status, and Action), and 'Staff Members Efficiency' (a table with columns Staff information, Efficiency, and Last Week Efficiency). A prominent red arrow points from the sidebar to a notification box on the right. The notification box contains four messages: 'You have been assigned a form for Rebecca' (few moments ago), 'You have been assigned a new task' (9 minutes ago), 'You have been assigned a new task' (9 minutes ago), and 'You have been assigned a new task' (9 minutes ago). It also includes filters for '3 months' and 'All period'.

After doing above steps successfully, then in “tasks” section will created for the assigned reviewer for “Request Medical Clearance”

The screenshot shows the Patient Checkin Tasks page. The sidebar is identical to the dashboard, showing user profile (Sylvia Joyce) and navigation links. The main area is titled 'Tasks' and displays a table of pending tasks. The columns are Title, Patient, Status, Created At, Due Date, Priority, and Action. The tasks listed are: 'Clinical Notes Action Task' (Patient: Amal Kline, Status: Pending, Due Date: November-12-2021 6:29pm, Priority: High), 'Review first doc document' (Patient: Amal Kline, Status: Pending, Due Date: November-12-2021 6:29pm, Priority: Medium), 'Medical Clearance' (Patient: Amal Kline, Status: Pending, Due Date: November-12-2021 6:29pm, Priority: Medium), and 'Request Referral' (Patient: Amal Kline, Status: Pending, Due Date: November-12-2021 6:29pm, Priority: Low). Each task row has 'Complete Task' and 'Patient Information' buttons.

- Staff members will click on the Complete task button.

- A pop up will appear, a staff member enters the details and clicks on the “complete” button.
- After this status of this task will be **Awaiting** for this action, and email will be triggered to a given email address of Doctor.
- The recipient will open the given link in email.
- Fill the form and click on the submit button.
- When you refresh this task, its status will be changed into **Completed**.



Request Clinical Notes

When you click on this a side modal will appear, enter the name and select a reviewer priority.

Add action for My Profession Is

Name

Reviewer

Priority

Close
Save

What will happen after doing the above activity?

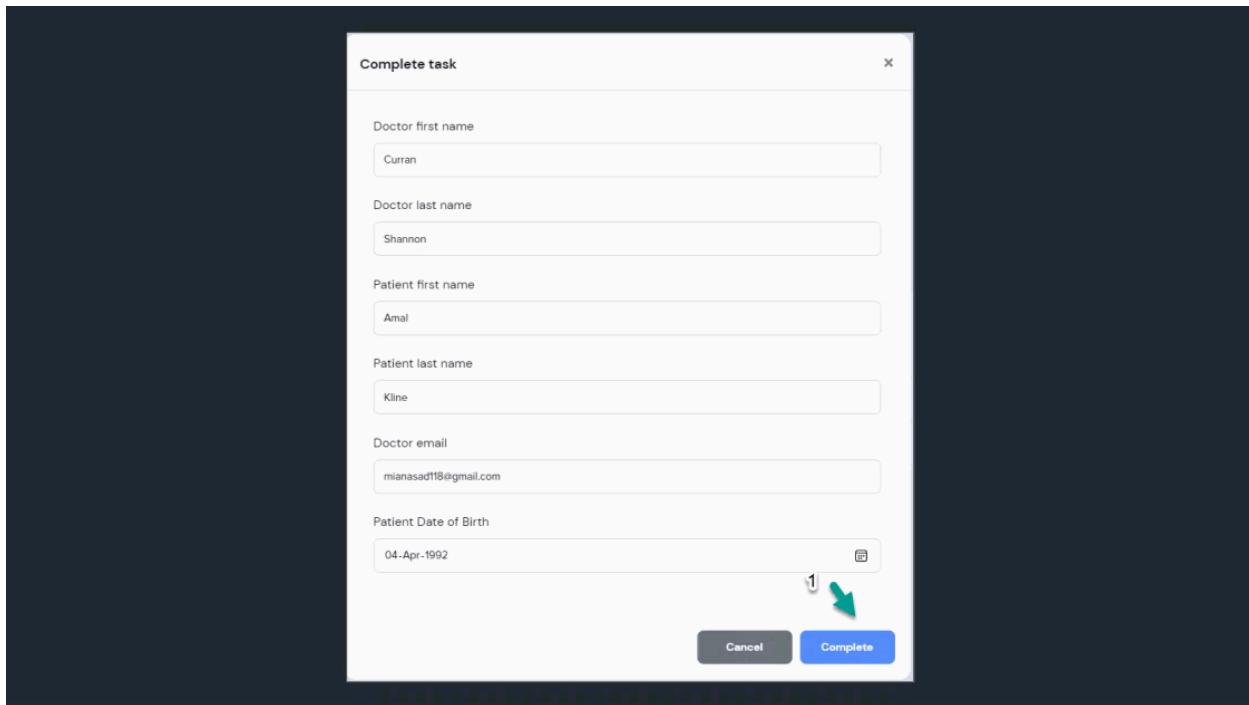
- A notification for this task will be generated to the above reviewer/staff member.
- When this staff member will click on “Assigned Forms”
- This staff member can see his all assigned form, and as well latest forms.
- The staff member will click on “Complete Task”.
- A form will appear and this staff member will fill this form.
- And click on the “Submit” button.

Note: For all these above steps see the gif as shown above below these steps.

After doing above steps successfully, then in “tasks” section will created for the assigned reviewer for “Request Clinical Notes”

Title	Patient	Status	Created At	Due Date	Priority	Action
Clinical Notes Action Task	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	High	<button>Complete Task</button> <button>Patient Information</button>
Review first doc document	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	Medium	<button>Complete Task</button> <button>Patient Information</button>
Medical Clearance	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	Medium	<button>Complete Task</button> <button>Patient Information</button>
Request Referral	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	Low	<button>Complete Task</button> <button>Patient Information</button>

- Staff members will click on the Complete task button.
- A pop up will appear, a staff member enters the details and clicks on the “complete” button.
- After this status of this task will be **Awaiting** for this action, and email will be triggered to a given email address of Doctor.
- The recipient will open the given link in email.
- Fill the form and click on the submit button.
- After that the status of this task will be **completed**.



Request Medical Clearance

When you click on this a side modal will appear, enter the name and select a reviewer and priority.

Add action for My Profession Is

Name

request doctor letter

Reviewer

Todd Paul

Priority

Low

Close

Save

What will happen after doing the above activity?

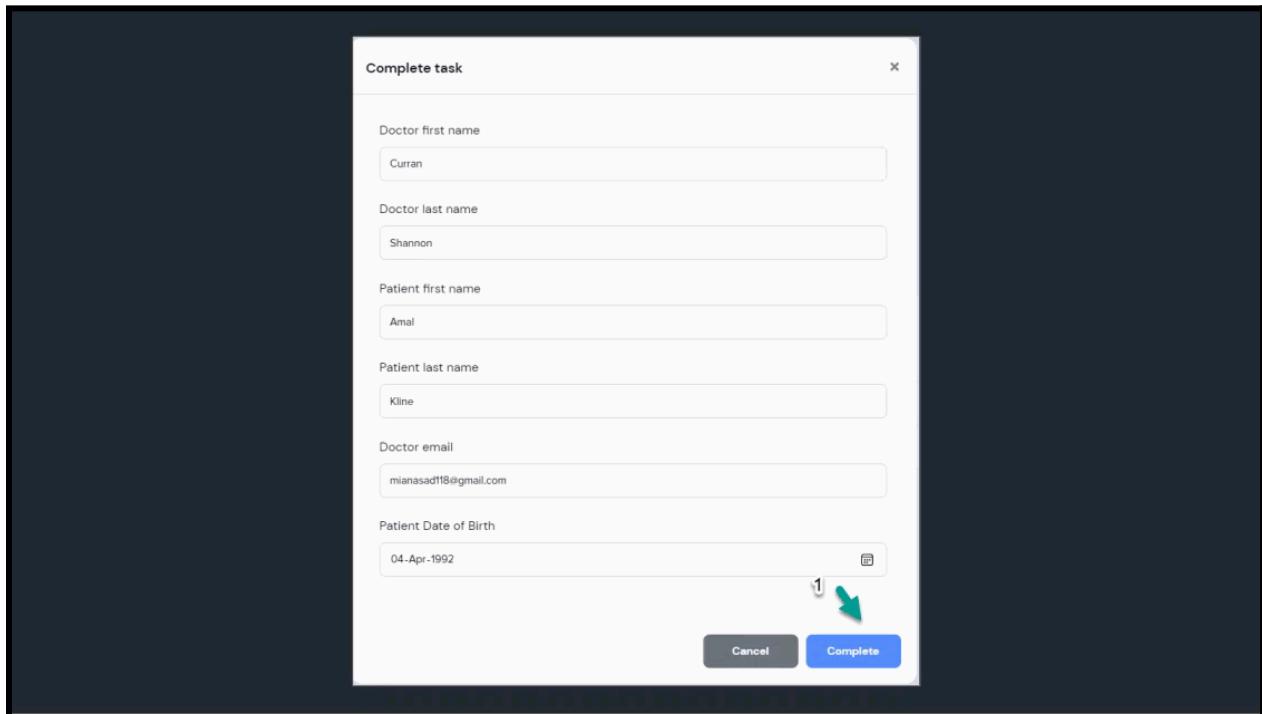
- A notification for this task will be generated to the above reviewer/staff member.
- When this staff member will click on “Assigned Forms”
- This staff member can see his all assigned form, and as well latest forms.
- The staff member will click on “Complete Task”.
- A form will appear and this staff member will fill this form.
- And click on the “Submit” button.

Note: For all these above steps see the gif as shown above below these steps.

After doing above steps successfully, then in “tasks” section will created for the assigned reviewer for “Request Medical Clearance”

Title	Patient	Status	Created At	Due Date	Priority	Action
Clinical Notes Action Task	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	High	Complete Task Patient Information
Review first doc document	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	Medium	Complete Task Patient Information
Medical Clearance	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	Medium	Complete Task Patient Information
Request Referral	Amal Kline	Pending	November-10-2021 6:29pm	November-12-2021 6:29pm	Low	Complete Task Patient Information

- Staff members will click on the complete task button.
- A pop up will appear, a staff member enters the details and clicks on the “complete” button.
- After this status of this task will be **Awaiting** for this action, and email will be triggered to a given email address of Doctor.
- The recipient will open the given link in email.
- Fill the form and click on the submit button.
- After this the task status will be **completed**.



The reviewer/staff user can also download these in pdf format.

- The staff user will click on “**Patient**”
- Find that patient the workflow was assigned.
- Click on **view assigned workflow** button
- Click on **Actions**, it will show you the all letters
- Click on the letter which You want to see & download.
- A new window will open in which filled data against that particular form is showing.
- Click on “**Download Pdf**” Button at the bottom

Note: Admin can also download these letters in pdf by following the above steps.

2: Assign tab

Please add scheduling too

When you click on this tab , the following type of information will be shown.

Action / Assign

Action Tab Assign Tab Tasks Tab

Staff User

Asad Hussain

Number of days for due date

1

Close **Save**

In the above section we will select a staff user , who will be assigned for this form. And we will input the due date for this form.

Scheduling in Assign Tab

When we want to trigger our task w.r.t specific date , then scheduling comes into play. We trigger our task on the basis of dates.

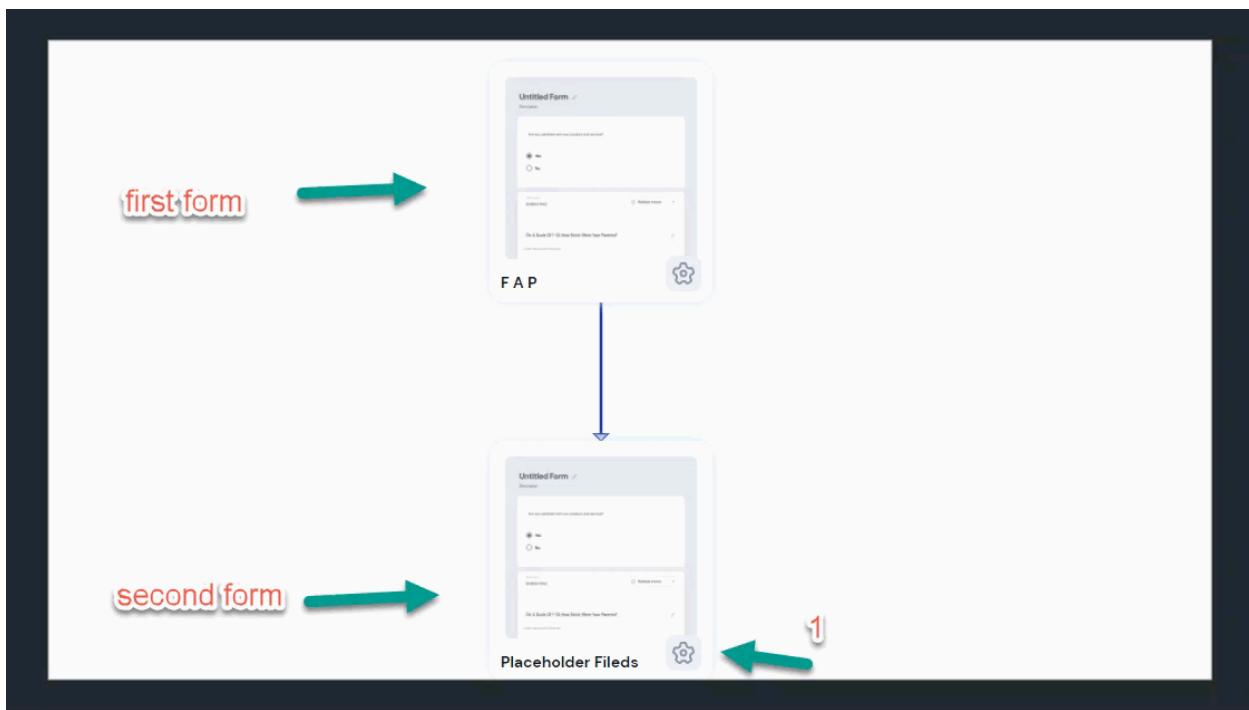
We are providing two types of scheduling in our app

- Trigger Immediately.
- Trigger based on Response.
- Trigger Immediately

Let suppose we have two forms in a workflow, we want that when our first form completed on specific date then second form should be triggered, that is assigned To staff members.

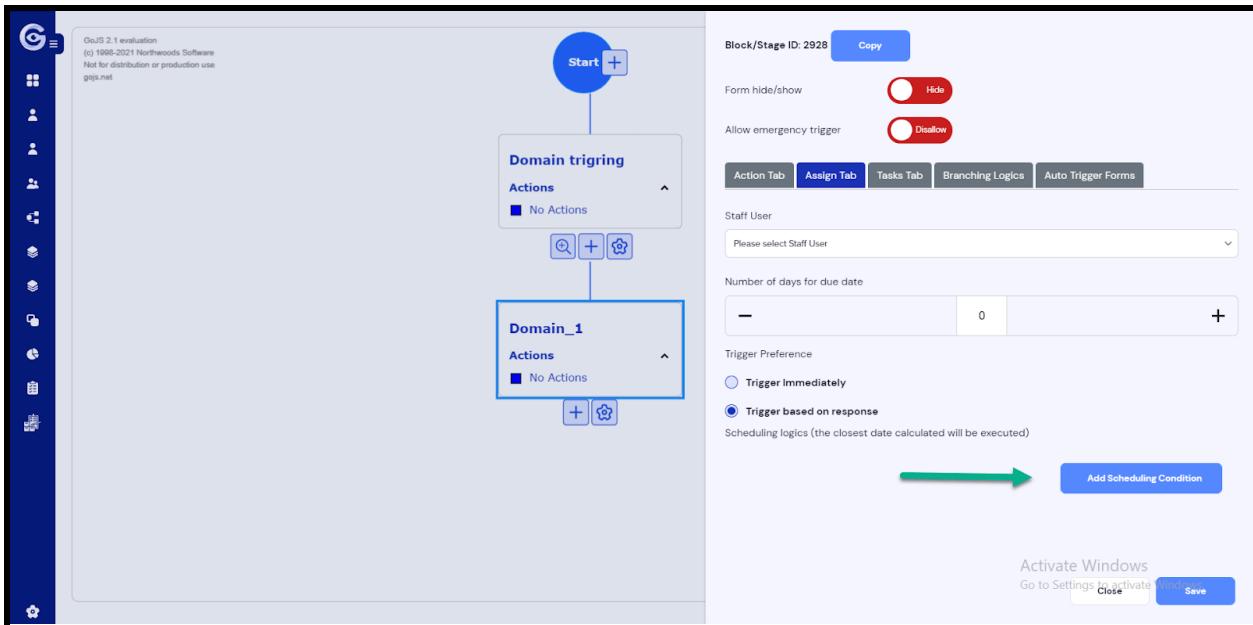
How can we do this ?

- Create a first form that must contain a date field.
- Create another form.
- Go to workflows.
- Drag and drop a form that has a date field.
- Drag and drop second below the first form.
- Click on the setting icon on the second form, then click on the assign tab.
- Select the check box option “Trigger immediately”. And click on save.
- See the below , when our first form is completed another form will be assigned to staff to do.

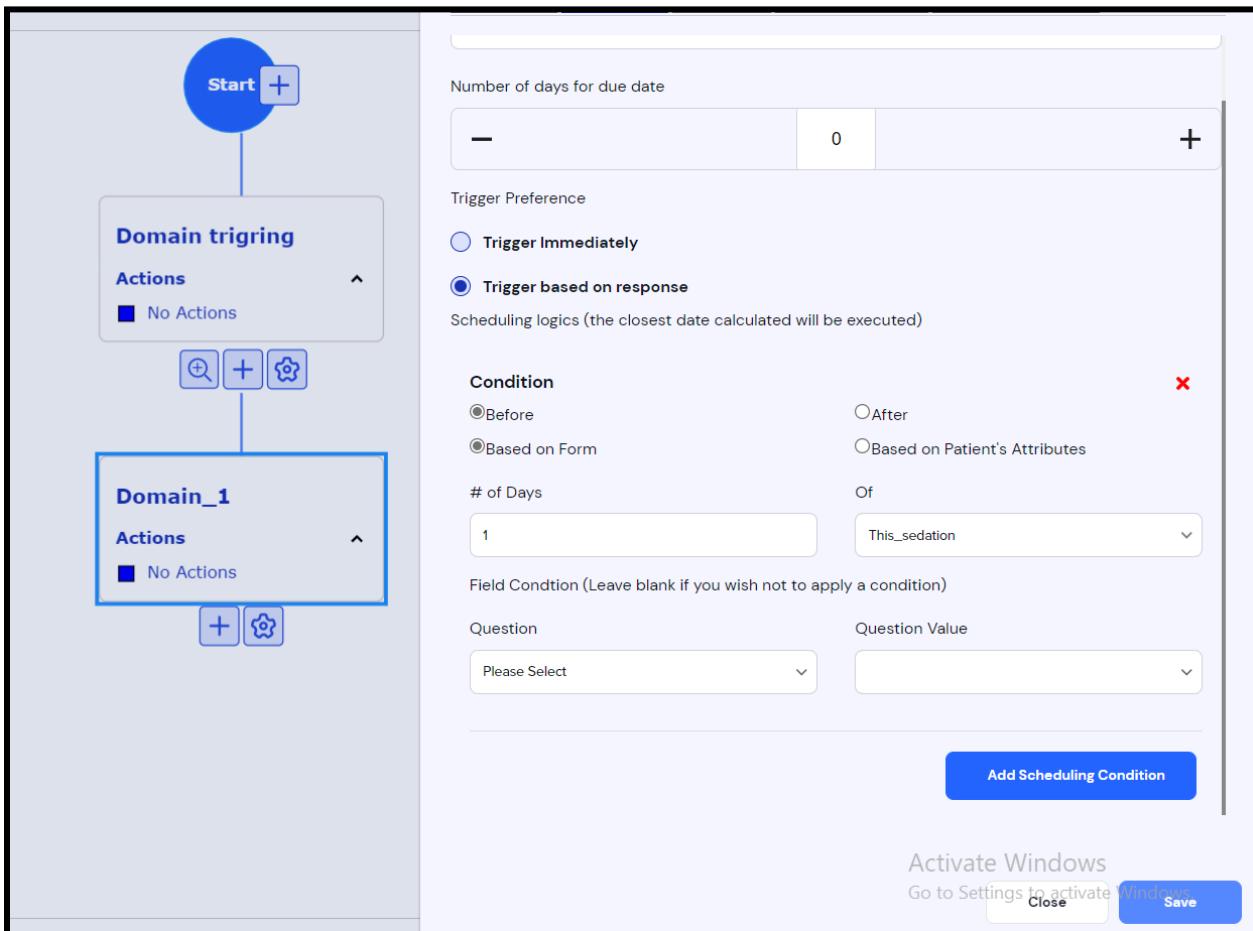


- **Trigger based on Response**

When you will click on this option radio button, it will show you the option button for “Add scheduling Condition”



When the user clicks on the “Add scheduling Condition”, it will show the scheduling method for this form.



In “Conditions” there are four radio option , you can select either one of the option in a row

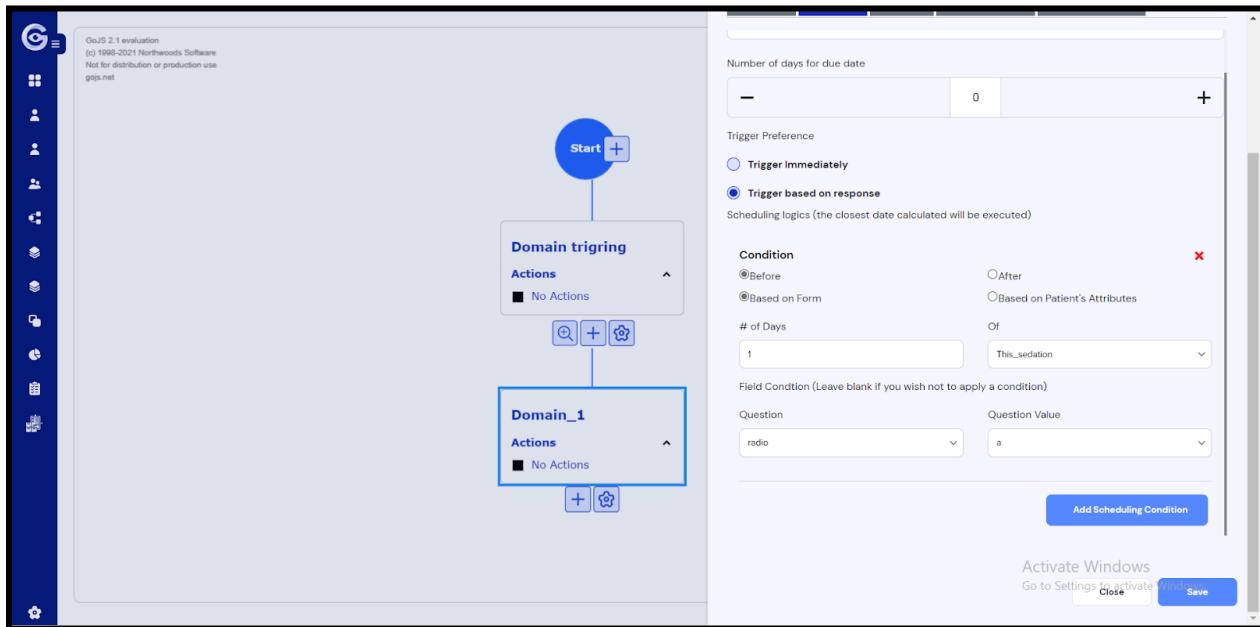
Note: You can select “Before/After” and “Based on Forms/Based on Patient Attributes”

Lets see these combination one by one for scheduling

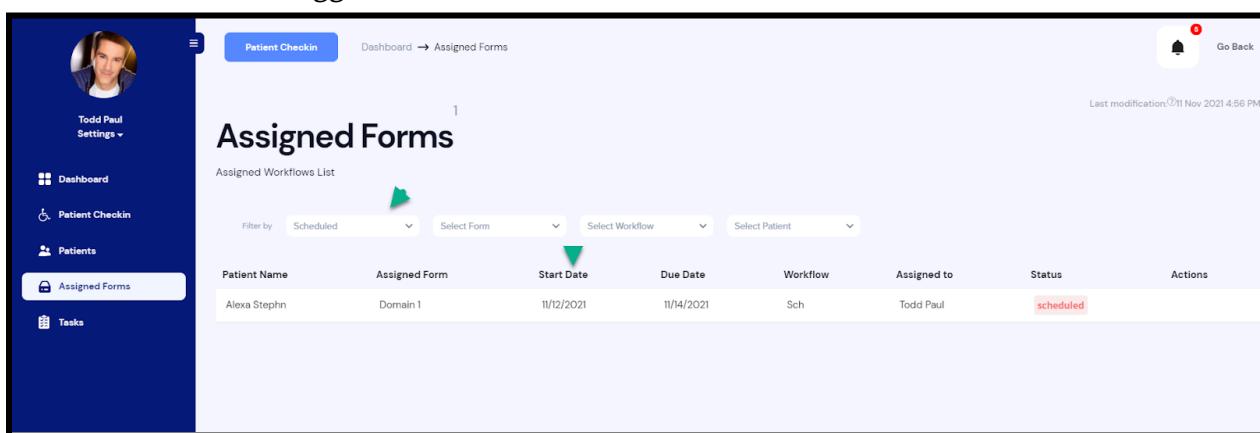
Before & Based on Form

After selecting these two radio buttons , you need to mention the “# of days `` and “of`` of given fields in a drop down.

You can select the “question” & “question value” as well as an optional.



When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.



Before & Based on Patients attributes

After selecting these two radio buttons , you need to mention the “# of days” and “of” of given fields in a drop down. Here it will show you to select the “Sedation/surgery date” of patients

You can select the “question” & “question value” as well as an optional.

The screenshot shows a scheduling configuration interface. On the left, there is a workflow diagram with a 'Start' node at the top, followed by a 'Domain triggering' step and a 'Domain_1' step. Both steps have 'No Actions' assigned. On the right, there is a configuration panel for 'Number of days for due date' (set to 2), 'Trigger Preference' (set to 'Trigger based on response'), and 'Scheduling logics (the closest date calculated will be executed)'. Under 'Condition', 'Based on Patient's Attributes' is selected. 'Of' is set to 'Sedation Consultation'. 'Field Condition (Leave blank if you wish not to apply a condition)' is empty. 'Question' is set to 'radio' and 'Question Value' is set to 'a'. A blue button at the bottom right says 'Add Scheduling Condition'.

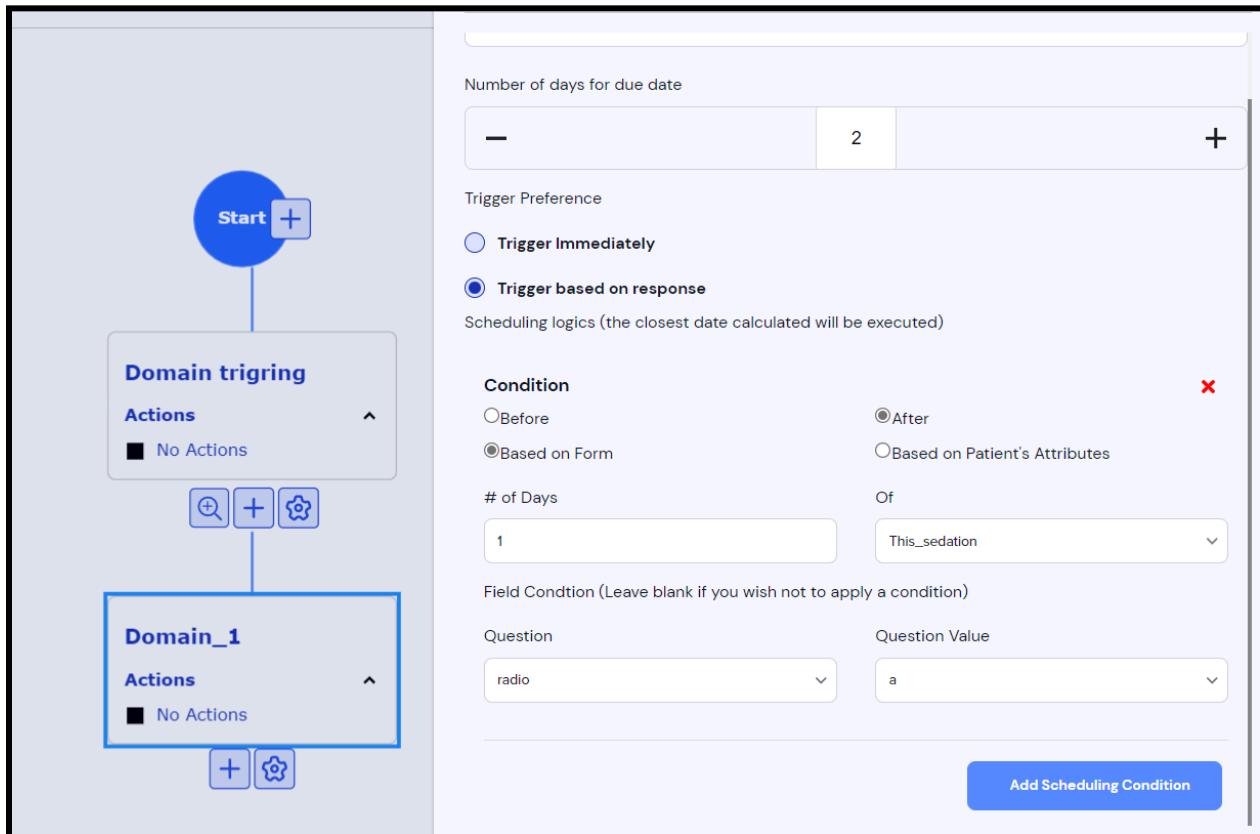
When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.

The screenshot shows a patient dashboard titled 'Patient Checkin'. The sidebar on the left has 'Assigned Forms' selected. The main area is titled 'Assigned Forms' and shows a table of 'Assigned Workflows List'. The table has columns: Patient Name, Assigned Form, Start Date, Due Date, Workflow, Assigned to, Status, and Actions. One row is visible: Azam Khalil, Domain 1, 11/12/2021, 11/14/2021, Sch, Todd Paul, scheduled. The status 'scheduled' is highlighted with a red border. The top right corner shows a notification icon with a red dot and the text 'Last modification 01 Nov 2021 5:06 PM'.

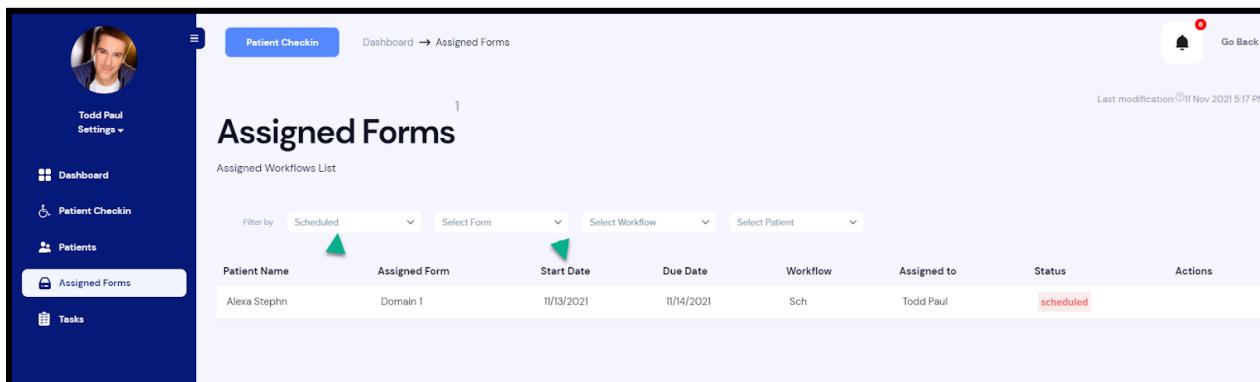
After & based on From

After selecting these two radio buttons , you need to mention the “# of days“ and “of“ of given fields in a drop down.

You can select the “question” & “question value” as well as an optional.



When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.



After & Based on Patient Attributes

After selecting these two radio buttons , you need to mention the “# of days `` and “of`` of given fields in a drop down.

You can select the “question” & “question value” as well as an optional.

The screenshot shows the configuration of a domain trigger. On the left, there's a workflow diagram with a start node and a 'Domain triggering' node connected by a line. The 'Domain triggering' node has an 'Actions' section with a 'No Actions' button. Below it is another 'Domain_1' node with its own 'Actions' section and a 'No Actions' button. On the right, the configuration details are shown:

- Number of days for due date:** A numeric input field showing '2'.
- Trigger Preference:** A radio button group where 'Trigger based on response' is selected.
- Scheduling logics (the closest date calculated will be executed):** A section with 'Condition' and 'Of' dropdowns. 'Condition' has 'Before' and 'After' options, with 'After' selected. 'Of' dropdown shows 'Sedation Consultation'.
- # of Days:** A numeric input field showing '1'.
- Field Condition (Leave blank if you wish not to apply a condition):** A section with 'Question' and 'Question Value' dropdowns. 'Question' dropdown shows 'radio' and 'Question Value' dropdown shows 'a'.
- Add Scheduling Condition:** A blue button at the bottom right.

When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.

The screenshot shows the 'Assigned Forms' list page. The left sidebar has a navigation menu with 'Assigned Forms' highlighted. The main area is titled 'Assigned Forms' and displays a table of assigned workflows:

Patient Name	Assigned Form	Start Date	Due Date	Workflow	Assigned to	Status	Actions
Azam khalil	Domain 1	11/14/2021	11/15/2021	Sch	Todd Paul	scheduled	

Tasks tab

We can also create a separate task for a particular form, in case when this form is completed , then this task is created for our staff member.

Add new task for X

Title
when this form is completed please call for patient for thanks you.

Description
when this form is completed please call for patient for thanks you.

Staff User
Mian Asad

Number of days for due date
1

Task Type
Standard Task

Close Save

Branching Logics

This part contains the Branching name /Form names and values upon that branching is created. You can edit the value for branching through this section.

The screenshot shows two panels of the GoJS software interface. The top panel is titled 'Branching Logics' and displays a branching logic diagram. It starts with a 'Start' node at the top, which branches down to two nodes: 'Domain_trigring' and 'one'. 'Domain_trigring' further branches into 'Domain_1' (value 'b') and 'one' (value 'a'). Each node has an 'Actions' section indicating 'No Actions'. On the right side of this panel, there are controls for 'Form hide/show' (Hide/Disallow), 'Allow emergency trigger' (disabled), and tabs for Action Tab, Assign Tab, Tasks Tab, Branching Logics (selected), and Auto Trigger Forms. A table below shows branch names, values, and actions:

Branch Name	Values	Actions
Domain_1	b	[Edit]
one	a	[Edit]

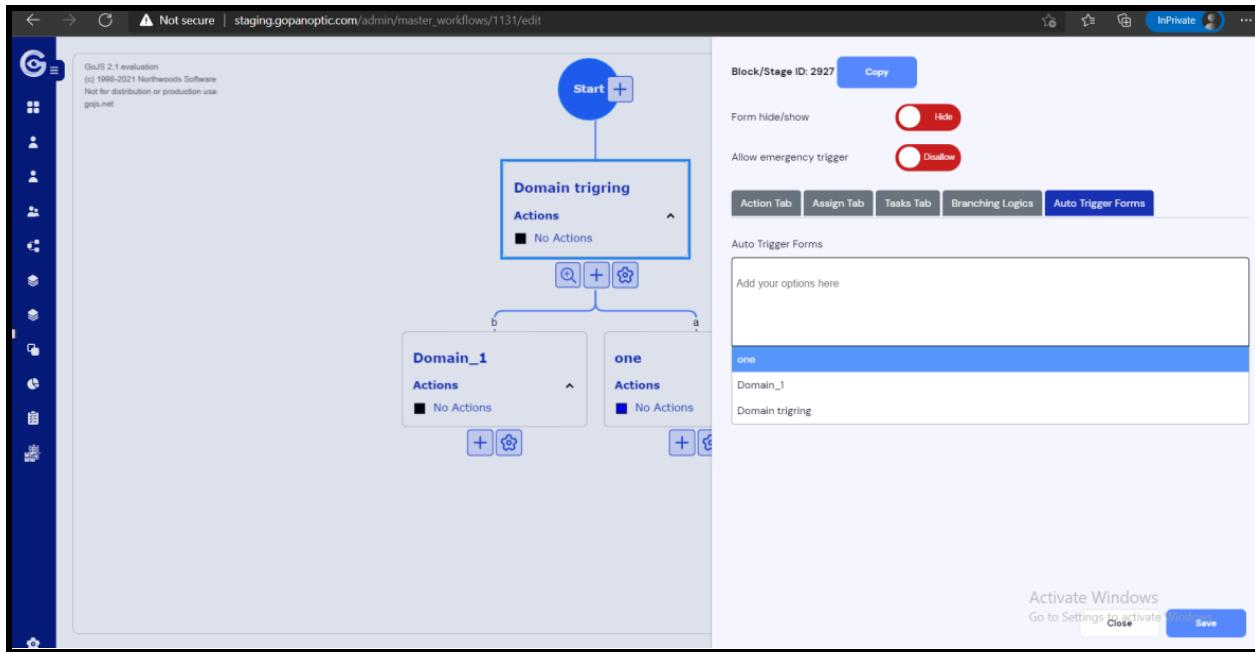
The bottom panel is titled 'Auto Trigger Forms' and shows an 'Edit branching logic' dialog. This dialog includes fields for 'Question' (radio) and 'Question Value' (empty input field). It also features 'Hide' and 'Disallow' buttons, and tabs for Tasks Tab, Branching Logics (selected), and Auto Trigger Forms. A table below shows values and actions:

Values	Actions
b	[Edit]
a	[Edit]

Both panels include a sidebar with various icons and a watermark for 'Activate Windows'.

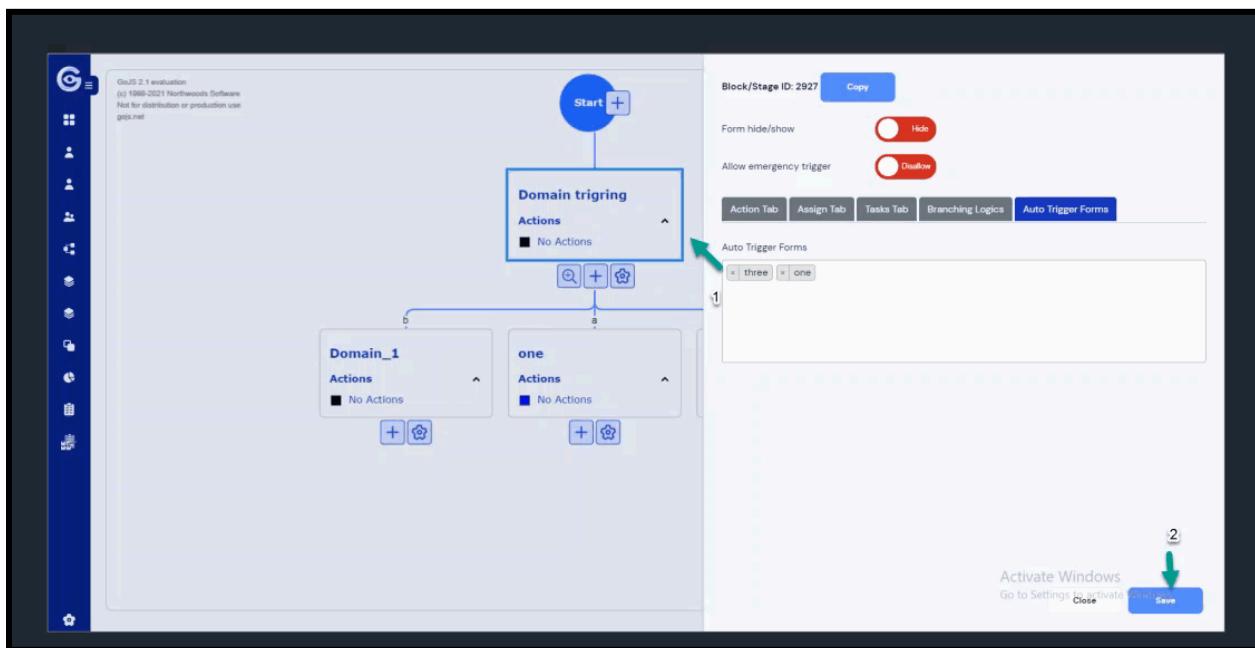
Auto Trigger Forms

When you click on this tab, it will show you a multiselect area box, when you will enter the mouse into this it will show you the all available forms that you can trigger after this form. You can select multiple forms to trigger after this form, and click to save the value of this multiselect option form.



Multi trigger - Copy paste

If you will select some forms in “Auto trigger forms” tab, and then copy that main/parent Form and paste it into any other child form then those auto trigger selected forms will also become the part of the child form. As shown below

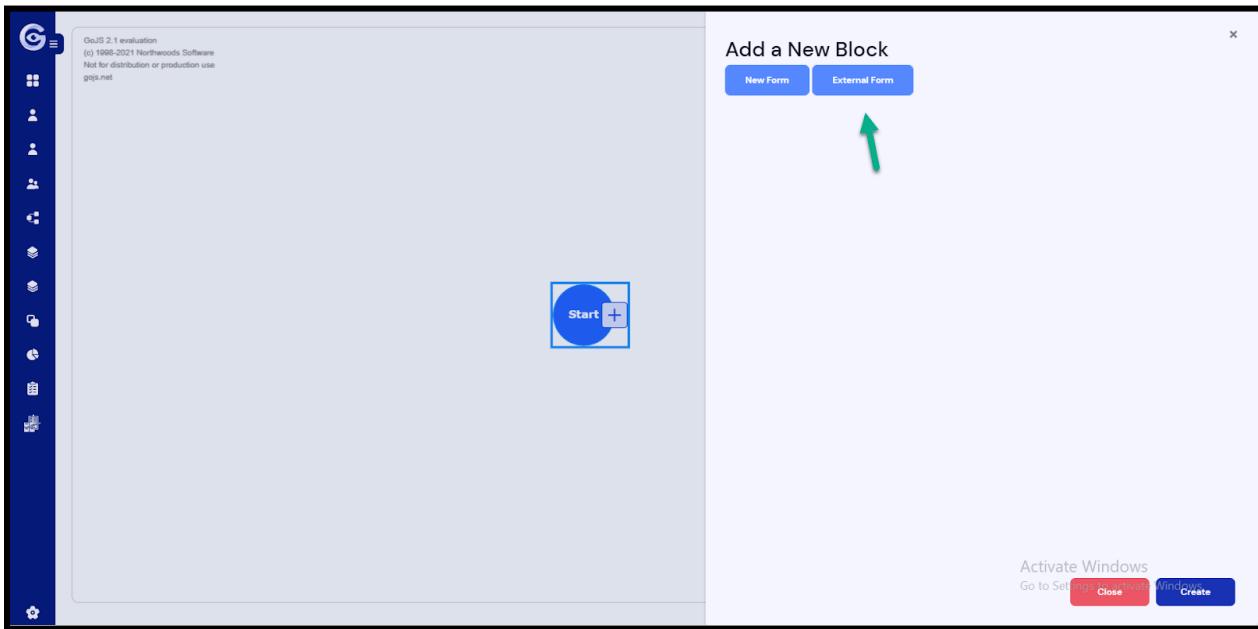


External Forms

These are the same form as new forms, the only difference is that we can assign these forms to an external user/actor, and external users will fill this form.

How To add external forms in workflow

Workflows>Add workflow>Click on + sign with start and it will show you side modal. Here two types of forms are showing New Form & External Form



When you will click on “external form” it will show you the following interface

Add a New Block

Select a form

Please select a form

Custom Email



Block Type

Linear

Activate Windows

Go to Settings to activate Windows

[Close](#)

[Create](#)

First of all you will select the form, then you will enter the content in the email section , and the default value for this form/block will be linear.

Add a New Block

Select a form

my profession is

Custom Email

| want this form filled by external person , that is not part of GP.
Please Fill the data in this form and submit the requiered information.

body p

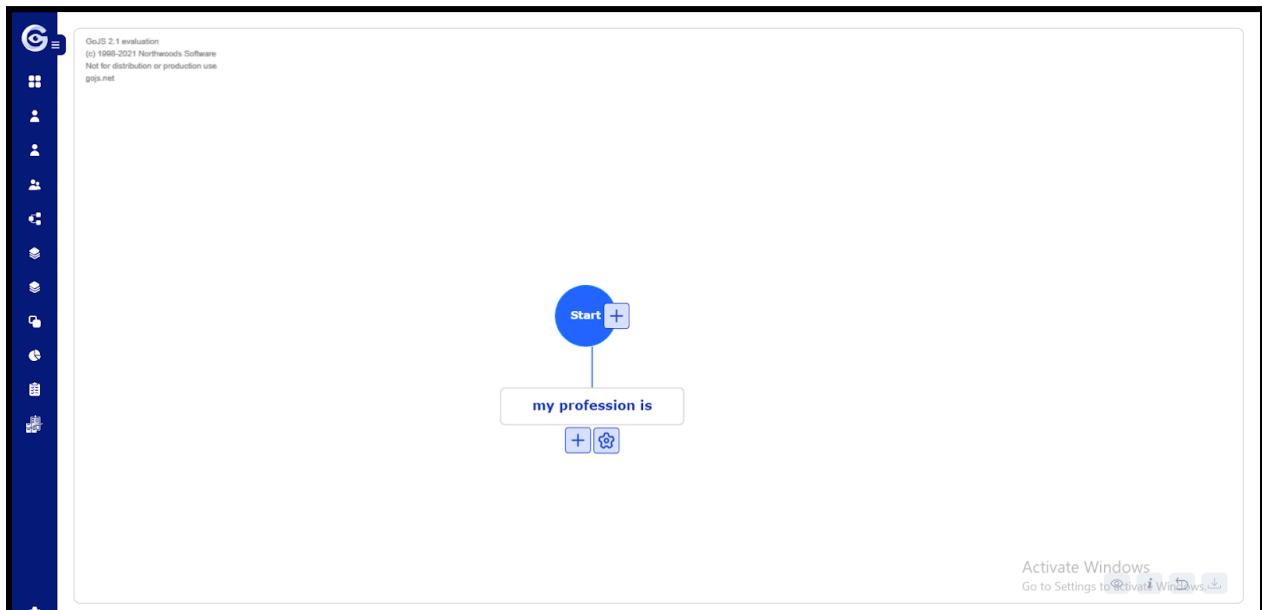
Block Type

Linear

Activate Windows
Go to Settings to activate Windows

[Close](#) [Create](#)

After adding the info when you will click on ‘create’ button, this form will be shown on workflow add page



Setting icon with external form

When you click the setting icon showing below the external form it will open a side modal having some tabs and further options.

Block/Stage ID: 2948 [Copy](#)

Form hide/show [Hide](#)

[Reviewer](#) [Email Content](#) [Tasks Tab](#) [Branching Logics](#)

Staff User

Please select Staff User

Number of days for due date

— 0 +

Trigger Preference

Trigger Immediately

Trigger based on response

Activate Windows
Go to Settings to activate Windows

[Close](#) [Save](#)

Block/Stage Id: the name depicts it self, it is the id of this block/external form

Form hide/show: on default this toggle option will be off, if you will turn this on, then information of this form will be saved on the Patient Document side.

Reviewer

Staff members will review this form initially, here you will select the staff member as reviewer, and select the due date of this form, and you can also apply scheduling on for this form.

Block/Stage ID: 2948 [Copy](#)

Form hide/show [Hide](#)

[Reviewer](#) [Email Content](#) [Tasks Tab](#) [Branching Logics](#)

Staff User
Todd Paul

Number of days for due date
- 2 +

Trigger Preference
 Trigger Immediately
 Trigger based on response

Activate Windows
Go to Settings to activate Windows
[Close](#) [Save](#)

Email Content

When you click on this , it will show you Email Body content , you can update this content as well

Block/Stage ID: 2948 [Copy](#)

Form hide/show [Hide](#)

[Reviewer](#) [Email Content](#) [Tasks Tab](#) [Branching Logics](#)

A blue toolbar containing icons for Source, Cut, Copy, Paste, Undo, Redo, and ABC dropdown. Below it is another row of icons for Bold, Italic, Underline, Strike, Text color, Alignment, Font size, Paragraph style, and a Greek symbol.

Styles Format ?

i want this form filled by external user that is not part of GP.
Please fill the data and in the form and submit the requiered information

Activate Windows
Go to Settings to activate Windows [Close](#) [Save](#)

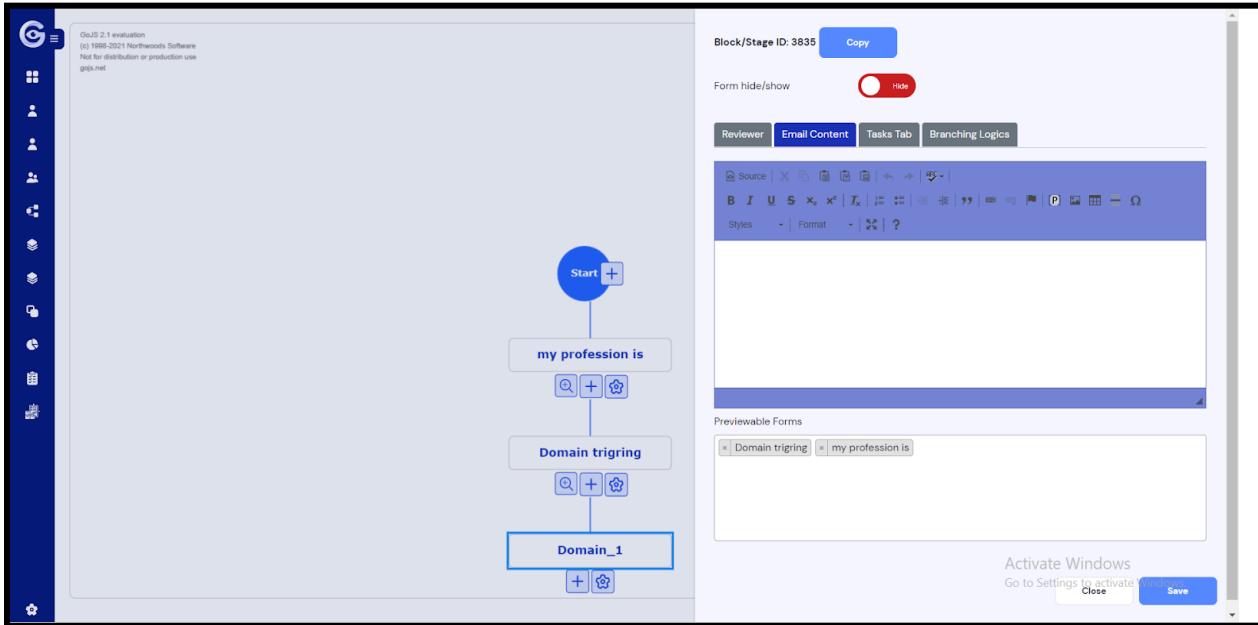
A large white area where the form content is displayed, currently showing placeholder text for an external user.

Previewable Forms

We have added a new functionality for more user convenience. If an external user wants to see the data of the previous form that is already submitted, then through this functionality they can view it.

This functionality will work when the current form has some parent forms.

In the email content section the user will select the forms that he wants to see at the time of submission of his current form.



After selecting the form in the “previewable form” section, the user will click on the save button.

When this workflow will be triggered and external user will fill this form upon that he/she select the form to see the preview , they can view it

The screenshot shows a web-based form titled 'Alesia Tomkiewicz'. It includes a header with 'Complete Domain 1', 'Surgery Date: 11/15/2021 22:02', and 'Treatments: my plan, second plan'. Below the header is a large input field labeled 'TEXT *' containing 'dummy data'. Underneath it is another input field labeled 'NUMBER *' containing '12312312312'. At the bottom right of the form is a blue 'Submit' button. A green arrow points from the previous screenshot to this 'Submit' button.

Task tab

Task tab has the same functionality that we have in “new form” . here we can create a task for staff members.

The screenshot shows the 'Tasks Tab' section of a form configuration interface. At the top, there are buttons for 'Copy' and 'Hide'. Below them is a 'Form hide/show' toggle switch. A navigation bar includes tabs for 'Reviewer', 'Email Content', 'Tasks Tab' (which is selected and highlighted in blue), and 'Branching Logics'. On the left, a sidebar menu lists various icons corresponding to different features like users, groups, and reports. In the center, a modal window titled 'Add new task for' is open. The modal fields include:

- Title:** Thank you call for patient
- Description:** when you done with this, call to patient
- Staff User:** Todd Paul
- Number of days for due date:** 3 (with minus and plus buttons)
- Priority:** Medium
- Task Type:** Standard Task

At the bottom right of the modal are 'Close' and 'Save' buttons.

Branching Logics

This section shows you the branching form , and values upon which branching is created. We can create branching in the external form as done earlier for simple forms.

Add a New Block

Select a form
Domain_1

Custom Email

Source |

Styles - Normal - |

this is all domain related form

body p

Block Type
Branch

Split Rule for New Block

Activate Windows
Go to Settings

Add a New Block

Question Value
 a

Split Rule for old blocks

Question
radio

Question Value
 b

Branch Value
my profession is

Activate Windows
Go to Settings

As you can see in the above image we can also create branching for external forms. And we can edit the values as well in this section like we done earlier for New forms

Block/Stage ID: 2948 [Copy](#)

Form hide/show [Hide](#)

[Reviewer](#) [Email Content](#) [Tasks Tab](#) [Branching Logics](#)

Branch Name	Values	Actions
my profession is	b	Edit
Domain_1	a	Edit

Edit branching logic

Question: radio

Question Value:

- I
- a
- b

[Close](#) [Save](#)

Values	Actions
b	Edit
a	Edit

Activate Windows
Go to Settings to activate [Wind Close](#)

After setting all of the information once you assigned this workflow to the patient , the external form will be assigned initially to staff members. And it will show in **tasks** section of staff member

53

Tasks

Title	Patient	Status	Created At	Due Date	Priority	Action
Email External form	Casie Arzilli	Pending	November-13-2021 6:54pm	November-15-2021 6:54pm	High	Complete Task Patient Information

When a staff member clicks on a complete task , it will show a pop up modal where a staff member enters the name and email of an external user , who will fill this form.

53

Tasks

Title	Patient
Email External form	Casie Arz

Last modification: 13 Nov 2021 6:54 PM
Go Back

When staff member click on “Complete” button , an email with link will be triggered to that specific external user

Please fill out the form for Casie Arzilli ➔ [Inbox](#)

asad clinic <asad_clinic@gopanoptic.com>
to me ▾

this is profession releted form for external user
kindly fill the requiered details and submit this form.
[Link to Form](#)

Best Regards,
Charles
asad clinic

When an external user clicks on “link to form” he/she will be redirected to that particular form that needs to be filled in.

← → C | Not secure | staging.gopanoptic.com/external_actor/assigned_workflows/2xR2kVqg+gzSbCCcQBrsRg==%0Afill.form

Casie Arzilli

Complete My Profession Is
Surgery Date: N/A
Treatments:

TEXT *

my profession is

Select

checkbox asad *

a
 b

This treatment

my plan
 second plan

Activate Windows
Go to Settings to activate Windows.

Once external users fill this form , and submit it , the status in the task section for staff members will be completed. And a task will be triggered to staff members that we created earlier.

Title	Patient	Status	Created At	Due Date	Priority	Action
thank you call to patient	Casie Arzilli	Pending	November-13-2021 7:08pm	November-15-2021 7:08pm	Medium	<button>Complete Task</button> <button>Patient Information</button>

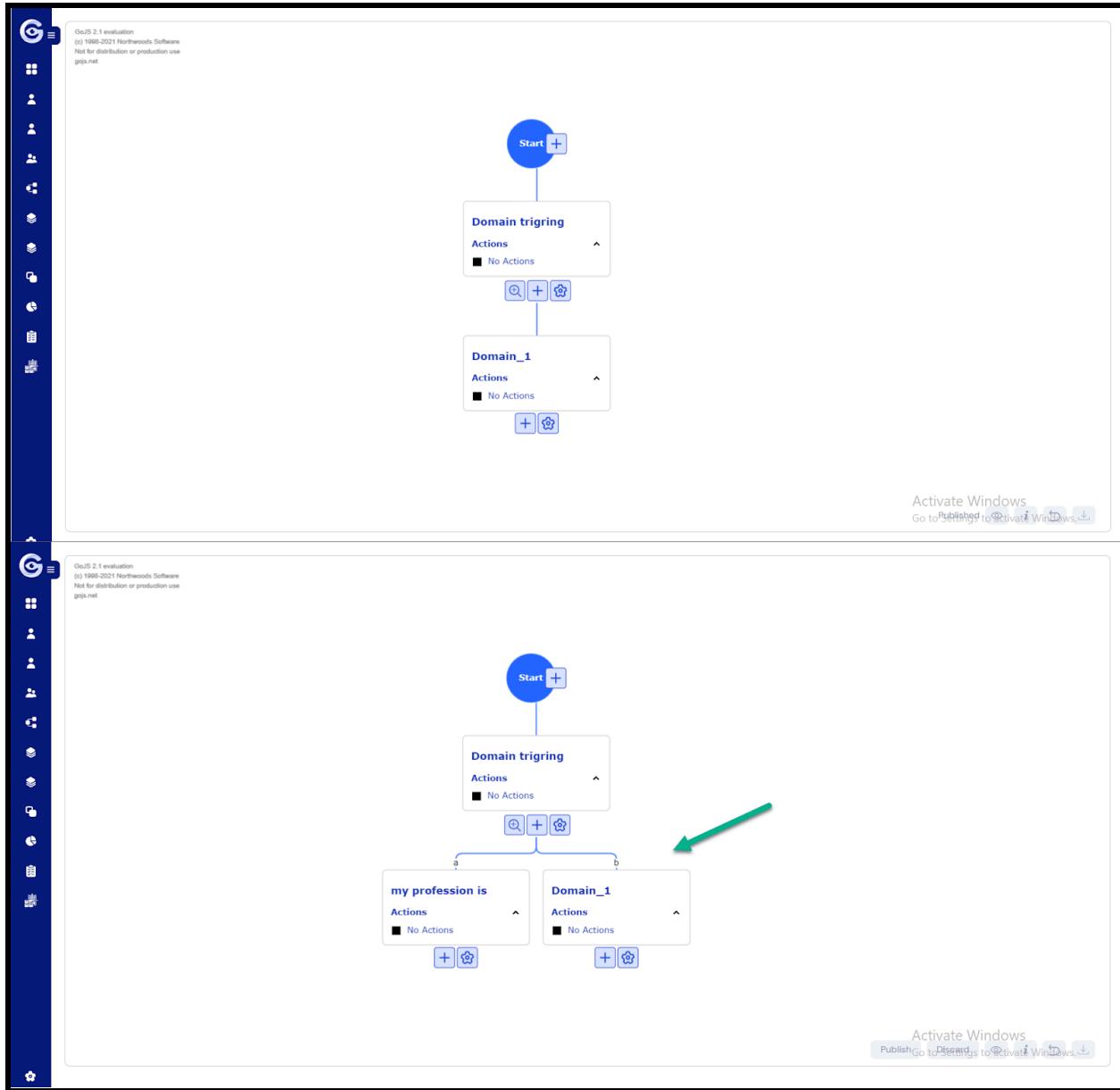
Revisions

When an admin user edits the workflow that is already assigned to the patient, and (add forms, delete form,copy/paste forms) and due to these types changes the graphical structure gets affected then we call it revisions .

Note: Workflow must be assigned to patient

Add Form with revisions

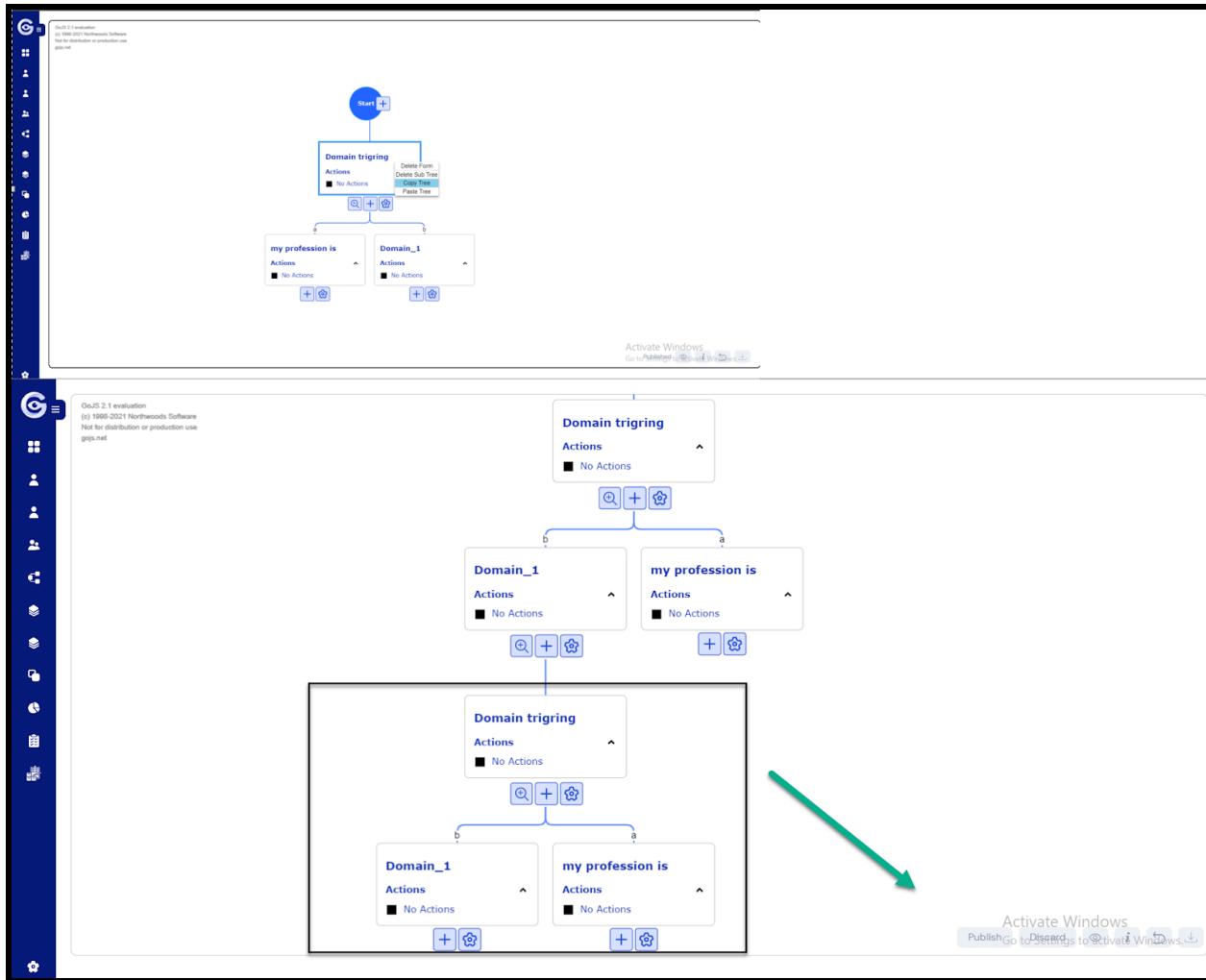
Let's suppose a workflow has two forms(a,b) only, when the admin adds a third form it will create a new revision for this workflow, as below.



If the user clicks on the “Publish” button the changes will be saved, and if the user clicks on the “Discard” option the new changes will not be reflected.

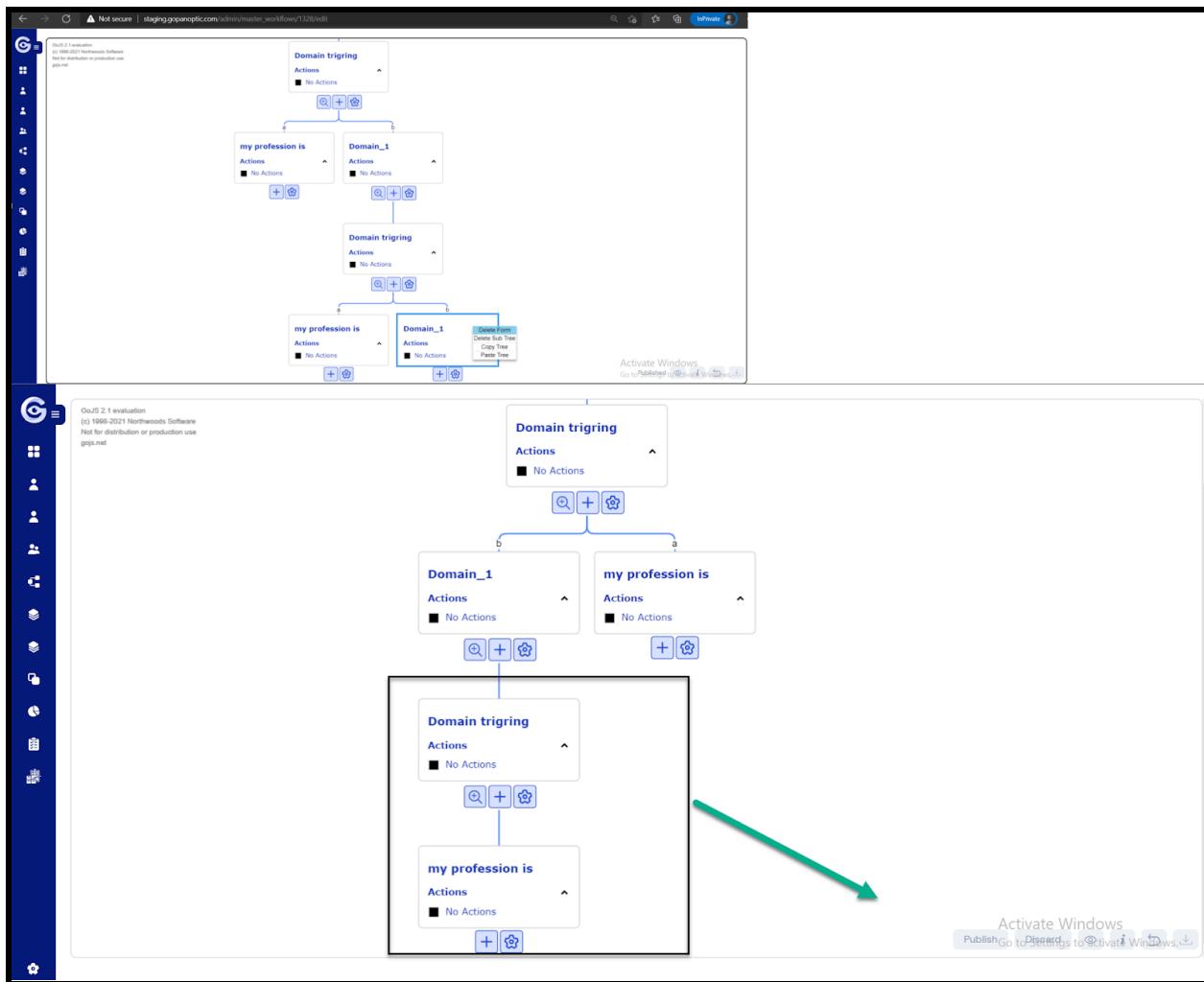
Copy/paste Form with revisions

If admins copy a form and paste it into another form , then revision will also be created.



Delete Form with revisions

If admins Delete a form , then revision will also be created.



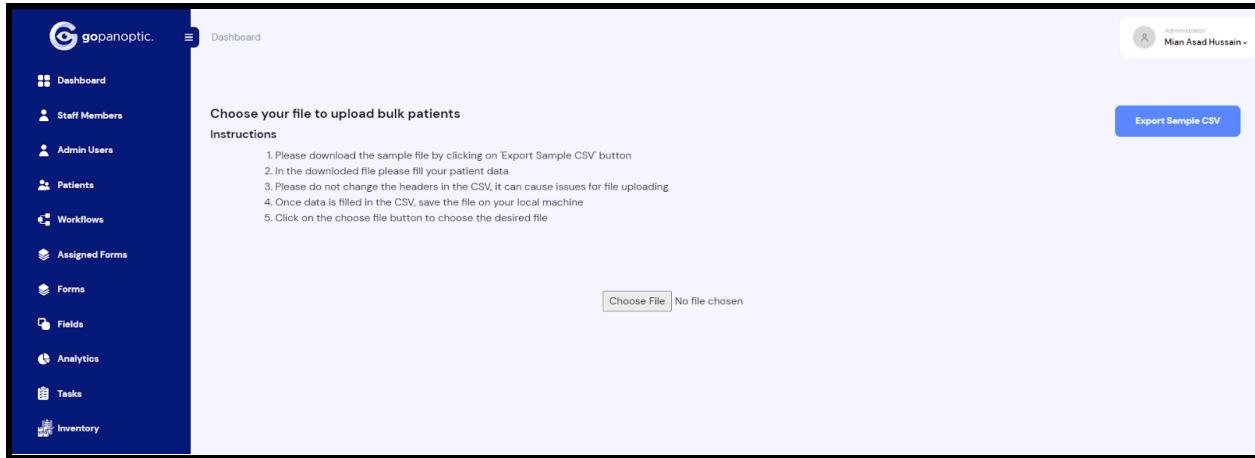
Patients

We are doing all our activities to facilitate our patients. On the admin side. When you click on this option in the sidebar, then you will see the list of All patients with their complete details.

Bulk Upload

Introduction

Bulk upload is the latest enhancement in GP. The purpose of adding this functionality into admin side is , that admin can create multiple patients with some clicks. When you click on this button, it will take you to the following page.



Here you will see the basic instruction for uploading multiple patients.

To do this follow the given instruction above , and some steps given below

- Click on the “Export Sample csv” button, and it will download a sample format for you .
- Open this sample csv.

	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name	Last Name	Phone Number	Stage ID	Home Number							
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												
21												
22												
23												
24												
25												
26												

- Enter the first and last name of your patient.
- Enter the unique Phone number.

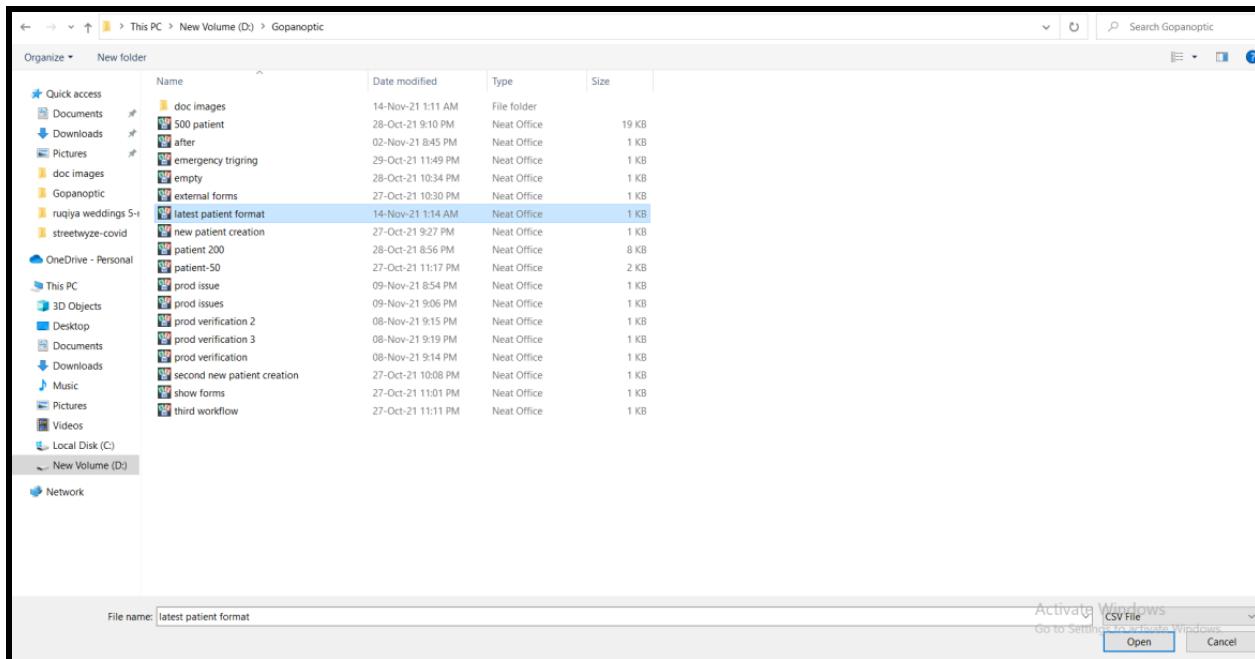
- Enter the stage ID
 - 1. Go to workflows
 - 2. Edit any workflow
 - 3. Click on the setting icon.
 - 4. Click on copy button for copy (block/stage ID)
- Enter the Home phone number.
- Save this file into csv format.

latest patient format.csv - Neat Office Calc

The screenshot shows a spreadsheet application window titled "latest patient format.csv - Neat Office Calc". The menu bar includes File, Edit, View, Insert, Format, Styles, Sheet, Data, Tools, Window, and Help. The toolbar contains various icons for file operations like Open, Save, Print, and a color palette. The ribbon includes Calibri font, 11pt size, bold, italic, underline, and a color palette. The formula bar shows "H16" and standard functions like f(x), Σ, and =.

	A	B	C	D	E
1	First Name	Last Name	Phone Number	Stage ID	Home Number
2	Aleshia	Tomkiewicz	29427	2860	900
3	Evan	Zigomalas	92842	2860	901
4	France	Andrade	156257	2860	902
5	Ulysses	Mcwalters	219672	2860	903
6	Tyisha	Veness	283087	2860	904
7	Eric	Rampy	346502	2860	905
8	Marg	Grasmick	409917	2860	906
9	Laquita	Hisaw	473332	2860	907
10	Lura	Manzella	536747	2860	908
11	Yvette	Klapiec	600162	2860	909
12	Fernanda	Writer	663577	2860	910
13	Charlesetta	Erm	726992	2860	911
14	Corrinne	Jaret	790407	2860	912
15	Niesha	Bruch	853822	2860	913
16	Rueben	Gastellum	917237	2860	914
17	Michell	Throssell	980652	2860	915
18	Edgar	Kanne	1044067	2860	916
19	Dewitt	Julio	1107482	2860	917
20	Charisse	Spinello	1170897	2860	918
21	Mee	Lapinski	1234312	2860	919
22	Peter	Gutierrez	1297727	2860	920
23	Octavio	Salvadore	1361142	2860	921
24	Martha	Teplica	1424557	2860	922

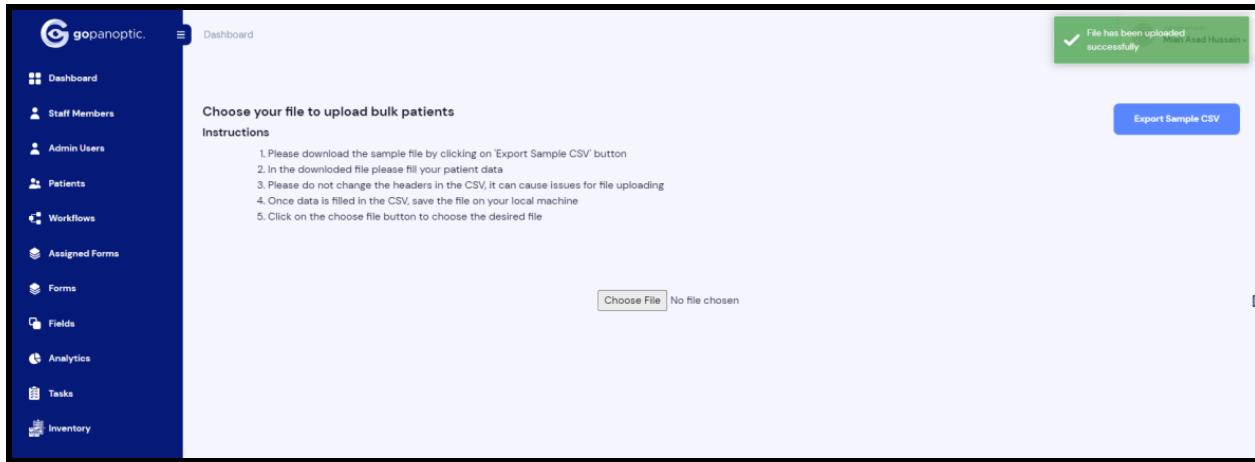
- Click on the “choose file” button, and select your patient csv file.



- Once you select your csv , all the data will be pre populated into the bulk upload section as shown below.

Valid?	first_name	last_name	phone_number	home_number	stage_id	workflow_id	workflow_title
Valid	Aleshia	Tomkiewicz	29427	900	2860	1117	trigger button
Valid	Evan	Zigomas	92842	901	2860	1117	trigger button
Valid	France	Andrade	156257	902	2860	1117	trigger button
Valid	Ulysses	McWalters	219672	903	2860	1117	trigger button
Valid	Tyisha	Veness	283087	904	2860	1117	trigger button
Valid	Eric	Rampy	346502	905	2860	1117	trigger button
Valid	Marg	Grasmick	409917	906	2860	1117	trigger button
Valid	Laquita	Hisaw	473332	907	2860	1117	trigger button
Valid	Lura	Manzella	536747	908	2860	1117	trigger button
Valid	Yvette	Klapec	600162	909	2860	1117	trigger button
Valid	Fernanda	Writer	663577	910	2860	1117	trigger button
Valid	Charlesetta	Erm	726992	911	2860	1117	trigger button
Valid	Corrinne	Jaret	790407	912	2860	1117	trigger button
Valid	Niesha	Bruch	853822	913	2860	1117	trigger button

- Click on the bulk upload button at the end of the above page , and it will show you the success notification.



- Reload the url/refresh the patient section page and there you will see the all latest patient that you uploaded by csv.

Name	Email	Phone Number	Status	Flags	Actions
Vielka Heyes	babybymailinator.com		Inactive		View Assigned Workflows Assign Workflows Status
Alec Welch	cudlynx@mailinator.com	843	In Progress		View Assigned Workflows Assign Workflows Status
Hassan Hamid	jykemoxa@mailinator.com		Processed		View Assigned Workflows Assign Workflows Status
Leandra Church	gojec@mailinator.com		In Progress		View Assigned Workflows Assign Workflows Status
Dante Gentry	parqucavap@mailinator.com		Deceased		View Assigned Workflows Assign Workflows Status
Blaze Torres	cylo@mailinator.com	115	In Progress		View Assigned Workflows Assign Workflows Status
Germain Jean Charles	GIRMAINDHQJS@GMAIL.COM	346827482	In Progress		View Assigned Workflows Assign Workflows Status
Kane Zimmerman	xadem@mailinator.net		In Progress		View Assigned Workflows Assign Workflows Status
Patrick Church	bibal@mailinator.com	152	In Progress		View Assigned Workflows Assign Workflows Status
Bevis Lane	fairywiju@mailinator.com	956	In Progress		View Assigned Workflows Assign Workflows Status

Admin user activities with Patients section

- Admin users can search any particular patient by entering their phone number.
- Admin users can search the patient , by applying filters.

- Admin users can see the assigned workflow for a particular patient through “view assigned workflow”.
- Assign workflow

Above all activities that we performed Such as creating fields, forms, workflows. After doing all of that, the admin will assign workflow to their patients.

How to assign a workflow to patient

The image consists of two vertically stacked screenshots of a software application interface, likely a patient management system. Both screenshots show a sidebar on the left with various navigation options: Dashboard, Staff Members, Admin Users, Patients (highlighted in blue), Workflows, Assigned Forms, Forms, Fields, Analytics, Tasks, and Settings. The main area is titled "Patients" and displays a list of patients with columns for Name, Email, Phone Number, Status, Flags, and Actions. Each patient row has a "View Assigned Workflows" button and an "Assign Workflows" button. A red box labeled "1" highlights the "Assign Workflows" button for the first patient. A red box labeled "2" highlights the "Assign Workflows" button for the second patient. In the bottom screenshot, a modal window titled "Assign Workflow to Patient" is open. It lists "All workflows" with columns for Name, Count, Show forms, and Assign button. A red box labeled "3" highlights the "Assign" button for the first workflow listed. The modal also contains a search bar, a note about activating Windows, and a note about letter actions.

Name	Email	Phone Number	Status	Flags	Actions
Vielka Hayes	bobbyh@mailinator.com		Inactive		View Assigned Workflows Assign Workflows Status
Alec Welch	cudynux@mailinator.com	843	In Progress		View Assigned Workflows Assign Workflows Status
Hassan Hamid	jykmoxa@mailinator.com		Processed		View Assigned Workflows Assign Workflows Status
Leandra Church	gojee@mailinator.com		In Progress		View Assigned Workflows Assign Workflows Status
Dante Gentry	paqucavap@mailinator.com		Deceased		View Assigned Workflows Assign Workflows Status
Blaze Torres	cylo@mailinator.com	115	In Progress		View Assigned Workflows Assign Workflows Status
Germain Jean Charles	GERMAINID123@GMAIL.COM	346827482	In Progress		View Assigned Workflows Assign Workflows Status
Kane Zimmerman	xadam@mailinator.net		In Progress		View Assigned Workflows Assign Workflows Status
Patrick Church	bibal@mailinator.com	152	In Progress		View Assigned Workflows Assign Workflows Status
Bevis Lane	ferywiju@mailinator.com	956	In Progress		View Assigned Workflows Assign Workflows Status

Name	Email	Phone Number	Status	Flags	Actions
Vielka Hayes	bobbyh@mailinator.com		Inactive		View Assigned Workflows Assign Workflows Status
Alec Welch	cudynux@mailinator.com	843	In Progress		View Assigned Workflows Assign Workflows Status
Hassan Hamid	jykmoxa@mailinator.com		Processed		View Assigned Workflows Assign Workflows Status
Leandra Church	gojee@mailinator.com		In Progress		View Assigned Workflows Assign Workflows Status
Dante Gentry	paqucavap@mailinator.com		Deceased		View Assigned Workflows Assign Workflows Status
Blaze Torres	cylo@mailinator.com	115	In Progress		View Assigned Workflows Assign Workflows Status
Germain Jean Charles	GERMAINID123@GMAIL.COM	346827482	In Progress		View Assigned Workflows Assign Workflows Status
Kane Zimmerman	xadam@mailinator.net		In Progress		View Assigned Workflows Assign Workflows Status
Patrick Church	bibal@mailinator.com	152	In Progress		View Assigned Workflows Assign Workflows Status
Bevis Lane	ferywiju@mailinator.com	956	In Progress		View Assigned Workflows Assign Workflows Status

Admin can also “un-assign” any workflow for a particular patient or multiple patients.

Clicking on “View Assigned workflow” the admin can see the total assigned workflow for a particular patient.

Total Assigned Workflow 1

Assigned Workflow 1

Title	Treatment Outcome	Description	PDF
Hamza Medicare Clinic	Unavailable	this clinic deals with heart, skin, and other problems.	View

All Forms:

- Dr. Qazi Abdul Samad**
Assigned to: Wasif Test | Due Date: 24 Jun 2021 6:09 PM
[Assign](#)
- Dr. Imran Bashir**
Assigned to: Asad Hussain | Due Date: 25 Jun 2021 1:26 PM
[Assign](#) | [View Data](#) | [Download Form](#)
- Dr Amjad Hussain**
Assigned to: N/A | Due Date: N/A
[Assign](#)
- Dr. Qazi Abdul Samad**
Assigned to: N/A | Due Date: N/A
[Assign](#)

Activate Windows
Go to Settings to activate Windows.

- Staff members and admin can also share the collected details of patients via email. On view assigned workflow this option is available.

All Forms:

Document Pronounce

Assigned to	Due Date
Mian Asad	5 Aug 2021 5:23 PM

[Assign](#) | [Actions](#) | [View Data](#) | [Download Form](#) | [Share](#)

Action Columns

Admin can view/edit the patient detail by clicking on view/edit icon in the action column.
When you click to view the patient it has three section

Additional information

When you go to this section you will see the additional detail of the patient as shown below.

The screenshot shows a patient detail page for 'Amal Kline'. At the top, there is a navigation bar with 'Dashboard → Patients → Show' and a user profile for 'Administrator Mian Asad Hussain'. A timestamp indicates 'Last modification 9 Nov 2021 5:50 PM'. Below the header, the patient's profile picture, name 'Amal Kline', gender 'Female', and date of birth '04/04/1992 (29 years old)' are displayed. There are buttons for 'Back', 'Edit Profile', and '+ Assign Workflow'. The main content area contains various patient details grouped into sections:

Name	Value	Name	Value
Name	Amal Kline	Sex	Female
Email	ceboce@mailinator.com	Status	in_progress
Phone Number	389	Surgery Date	10/21/2021 23:32
Sedation Consultation	10/22/2021 23:32	Treatments	my plan
Flags			

Below this, there are tabs for 'Additional Information', 'Assigned Forms', and 'Patient Documents', with 'Additional Information' being the active tab. The page is divided into several sections:

- Personal Information**: Contains fields for Date Of Birth (04/04/1992), Profession, Address, Home Number (74), Office Number (475), City (Molestiae qui r), Phone Number (389), Zip Code (51709), and Emergency Contact information (Name: Michael Haley, Phone Number: 168, Relation: Qui autem et ex).
- Background Information**: Contains fields for Date Of Birth (04/04/1992) and Profession.
- Contact Information**: Contains fields for Address, Home Number (74), Office Number (475), City (Molestiae qui r), Phone Number (389), Zip Code (51709), and Emergency Contact information (Name: Michael Haley, Phone Number: 168, Relation: Qui autem et ex).
- Emergency Contact**: Contains fields for Name (Michael Haley), Phone Number (168), and Relation (Qui autem et ex).
- Insurance Information**: Contains fields for Medical Insurance Name (Mara Spears), Medical Insurance Member (Obcaecati volup), Dental Insurance Name (Dominic Bailey), and Dental Insurance Member (Porro laudantium).

Assigned Forms

When you click on this it will show you the all assigned forms for this patient

Patient Documents

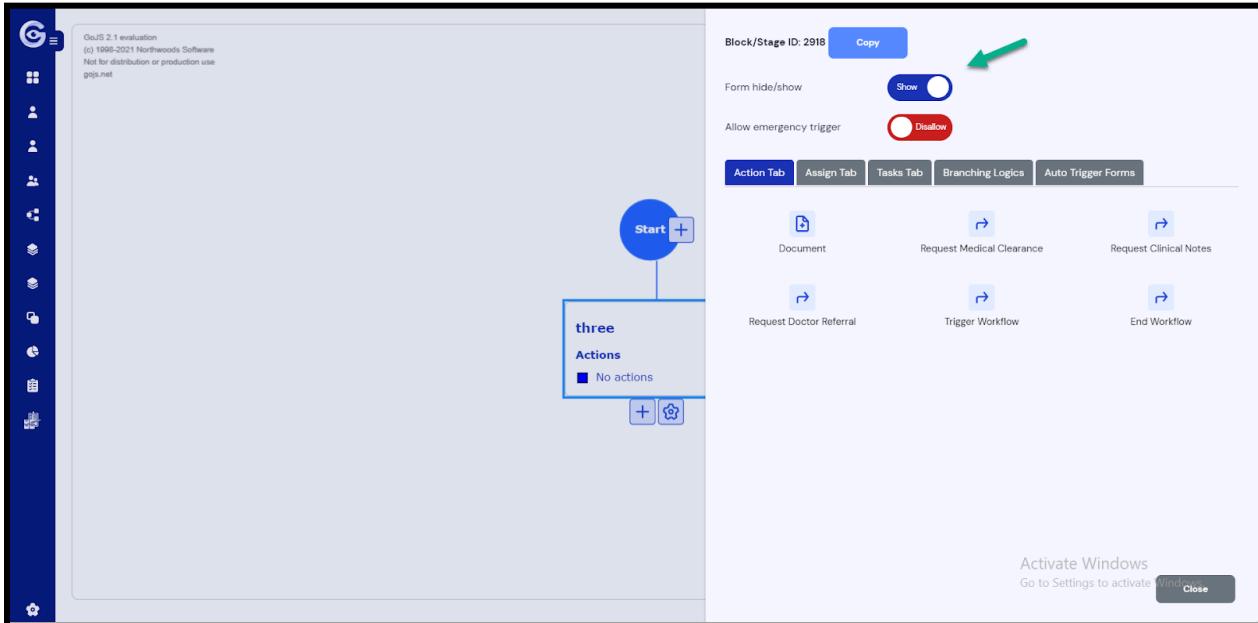
Once you click on this it will show you the documents for this patient (docs, Request medical clearance, request clinical notes, request doctor Referral)

Document Type	File Name	Upload Date	Actions
Letter	three - Request Medical Clearance	9 Nov 2021 at 6:22:44 PM	
Letter	three - Request Doctor Referral	9 Nov 2021 at 6:23:38 PM	
Action Document	simple doc - Document	9 Nov 2021 at 6:21:56 PM	

Activate Windows
Go to Settings to activate Windows.

Patient Documents Forms

In the patient documents section you can also see the submitted form of this patient. only those forms will be available here , whose toggle will be set as = Show Form, at the time of creation of workflow in forms settings.



As you can see above , the we have set the toggle option as “show form”, when staff member fill this form for patient, then we can see the details of this submitted form in “Patient documents section as shown below

The screenshot shows a patient profile for 'Alexa Stephn'. At the top, there is a circular profile picture, the name 'Alexa Stephn', the date of birth '/11/ 9/2021(0 years old)', and three buttons: 'Back', 'Edit Profile', and '+ Assign Workflow'. Below this is a summary section with fields: Name (Alexa Stephn), Email (empty), Phone Number (6724), Sex (empty), Surgery Date (11/12/2021 23:21), Sedation Consultation (N/A), Treatments (empty), Status (active), and Flags (empty). At the bottom of this section is a note: 'Additional information Assigned Forms Patient Documents'. The 'Patient Documents' tab is currently selected. A table below lists one document: Document Type (three), File Name (Form-three.pdf), Upload Date (9 Nov 2021 at 6:48:22 PM), and Actions (an icon). At the bottom right of the page is a message: 'Activate Windows' and 'Go to Settings to activate Windows.'