Document Name	**Gopanoptic Documentation**
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Target Audience	**End User, Development, Technical Support, Quality Assurance**
Document Reviewer	**Hamza Awais & Hassan**

Introduction

This application consists of two types of users.

User Roles

Admin

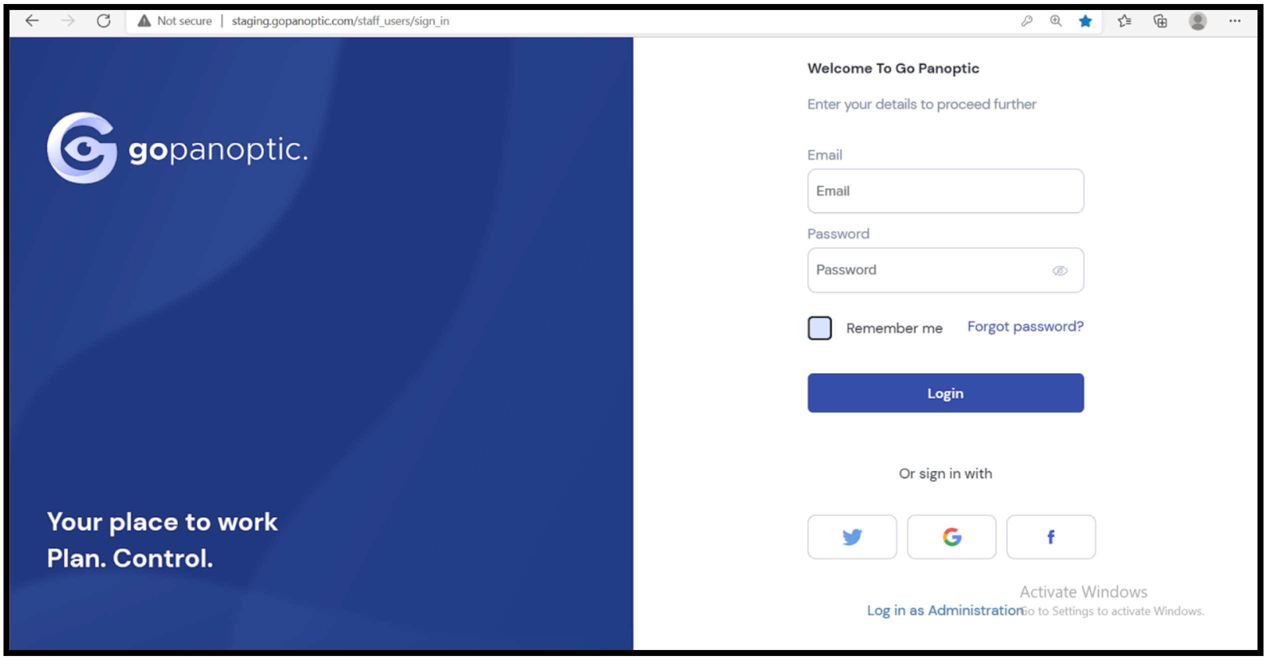
Staff members

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

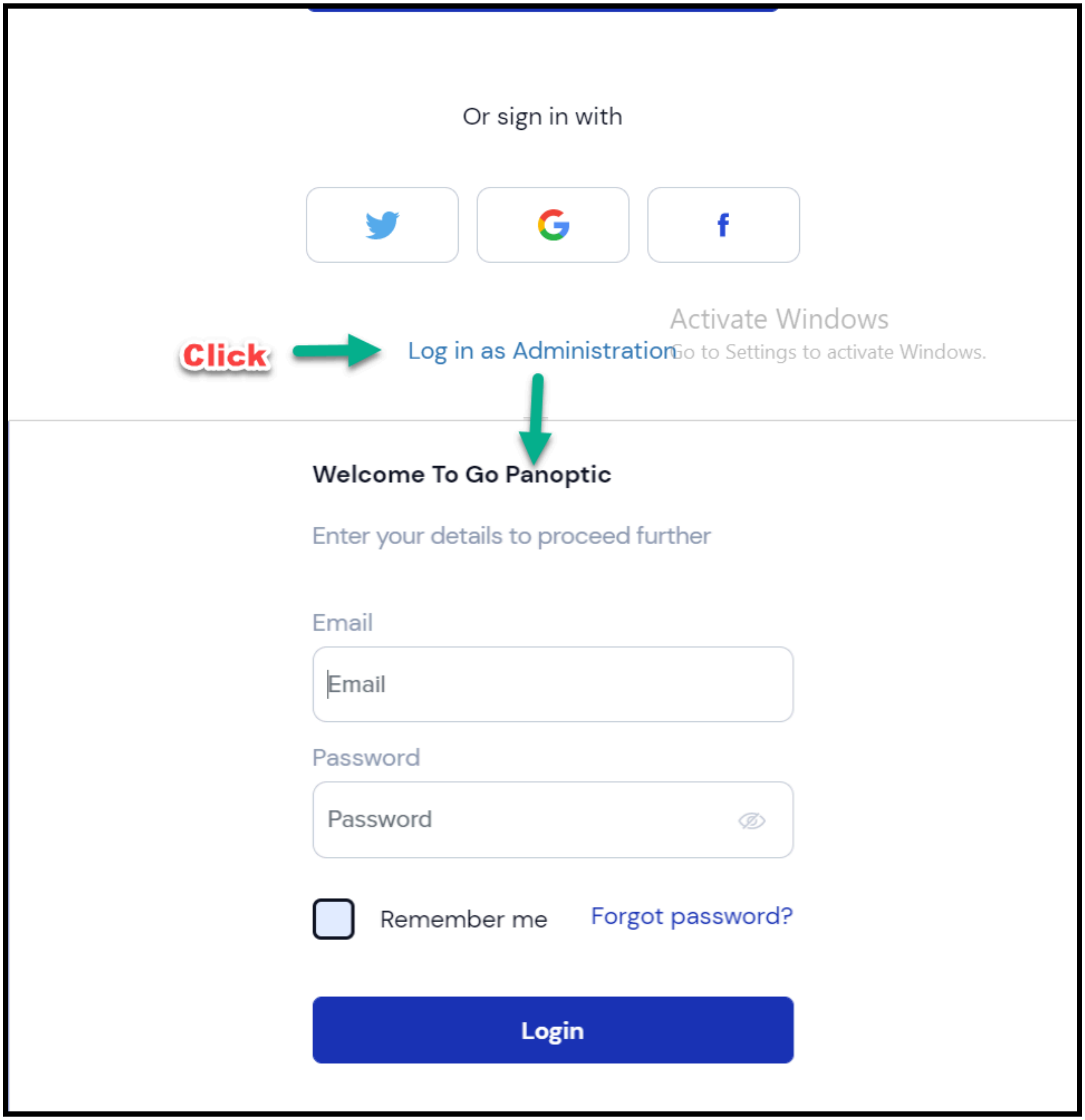
Initially we will discuss all the roles and responsibilities of Admin users in detail and then we will move on to staff members.

Admin user

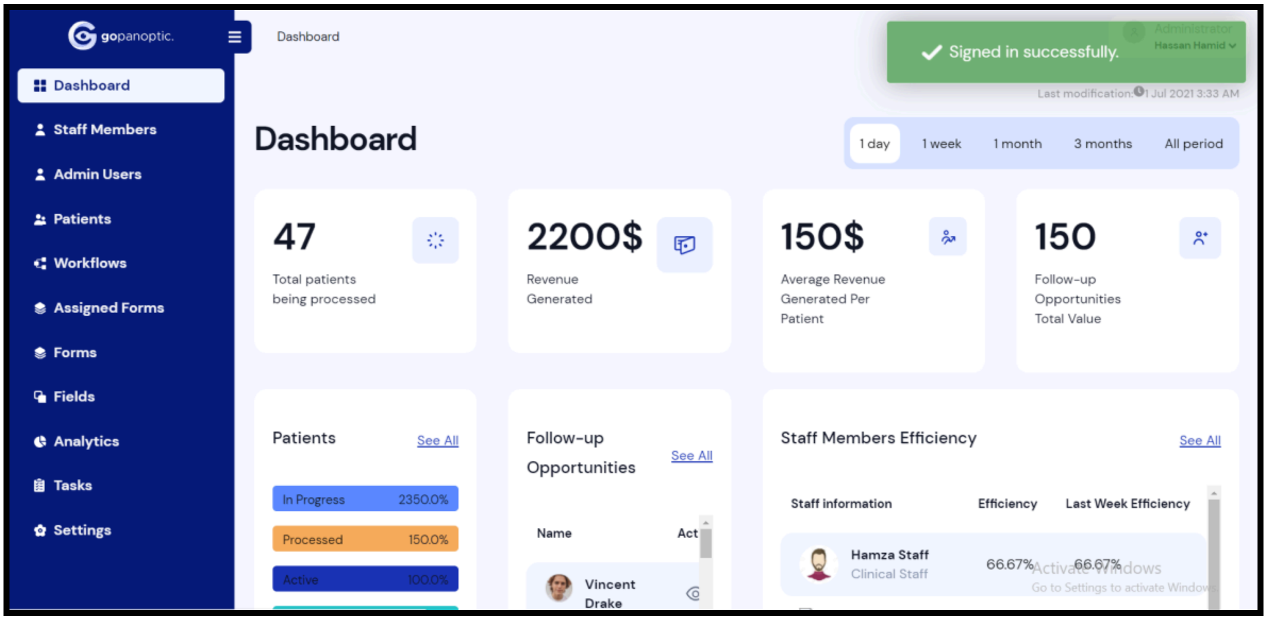
Admin users can perform all types of activities. The user has all types of rights. Let's get into it, with the login process Go Panoptic



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**”



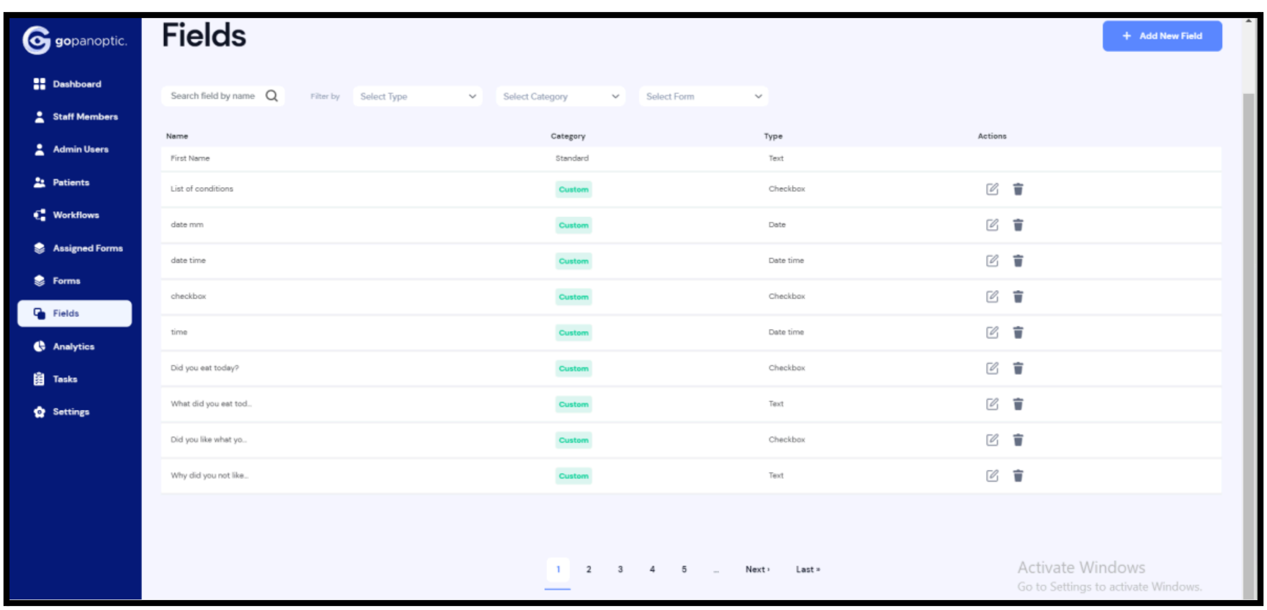
Now enter the Admin login credential and Click on the "**Login**" button. The below image that is showing is the first interface that You see after login.



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

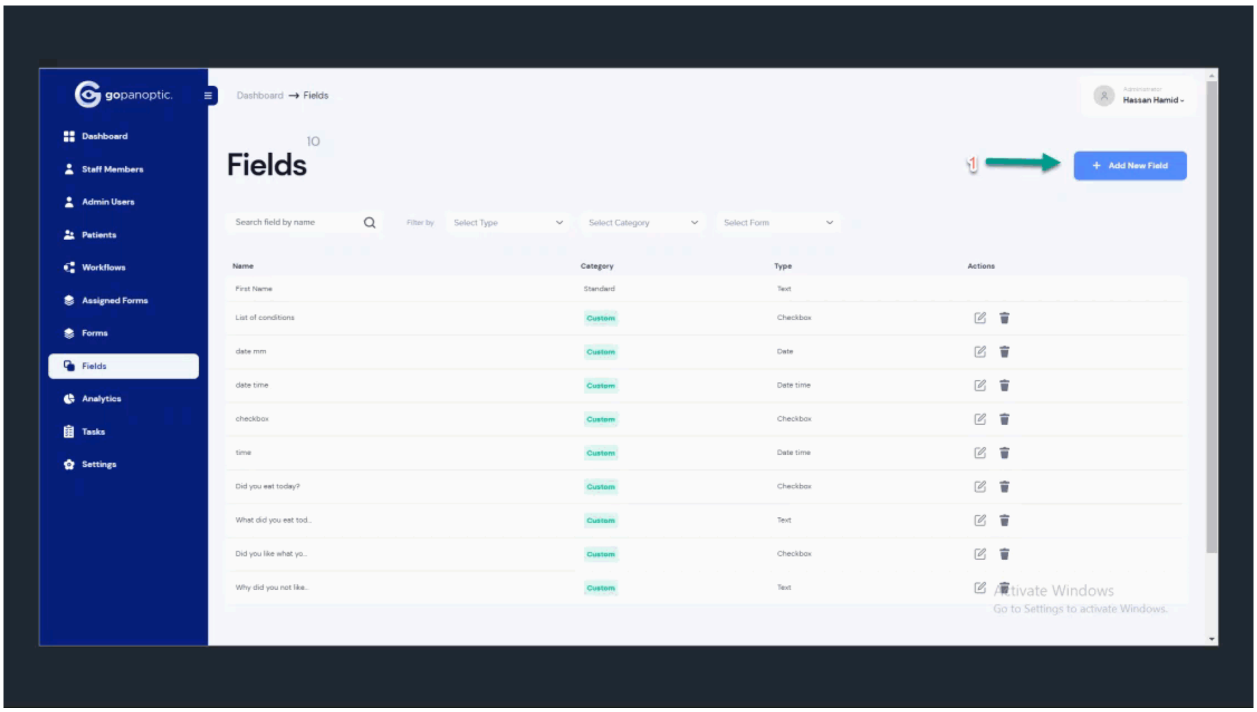


Admin users can create different types of fields, fields are used to get input data.
We have two Categories of fields.

- 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

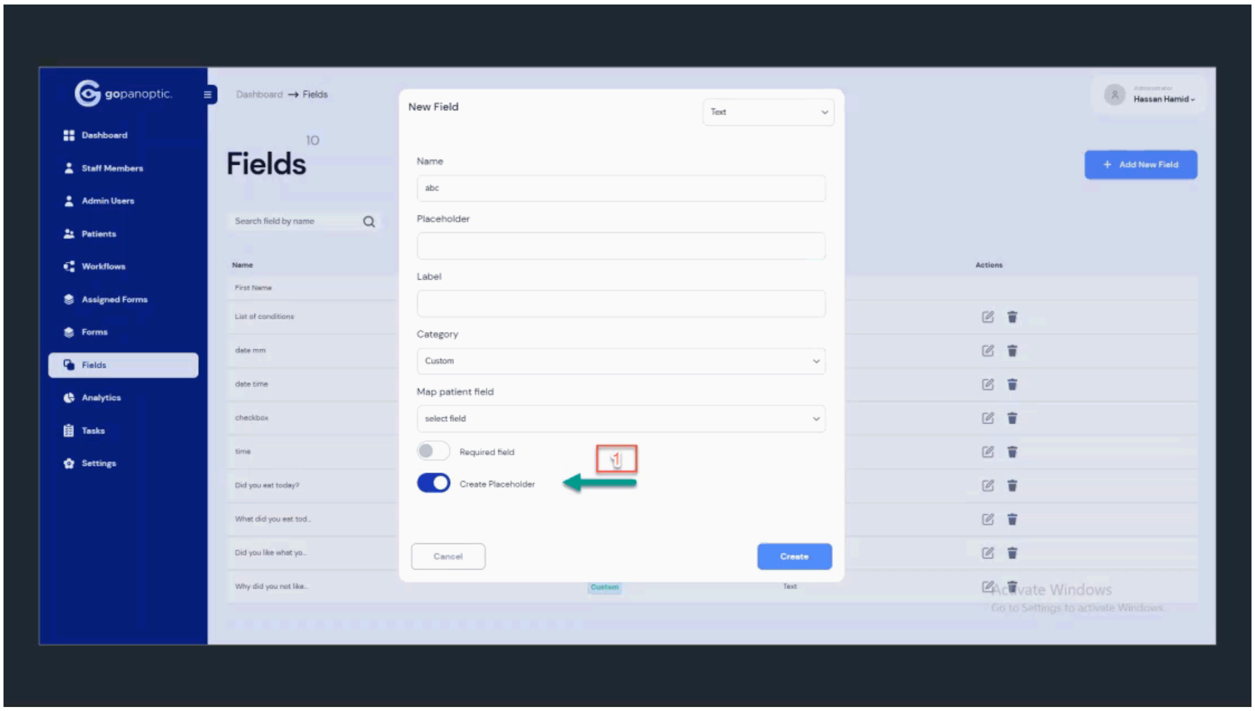


Create Placeholder (toggle)

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.

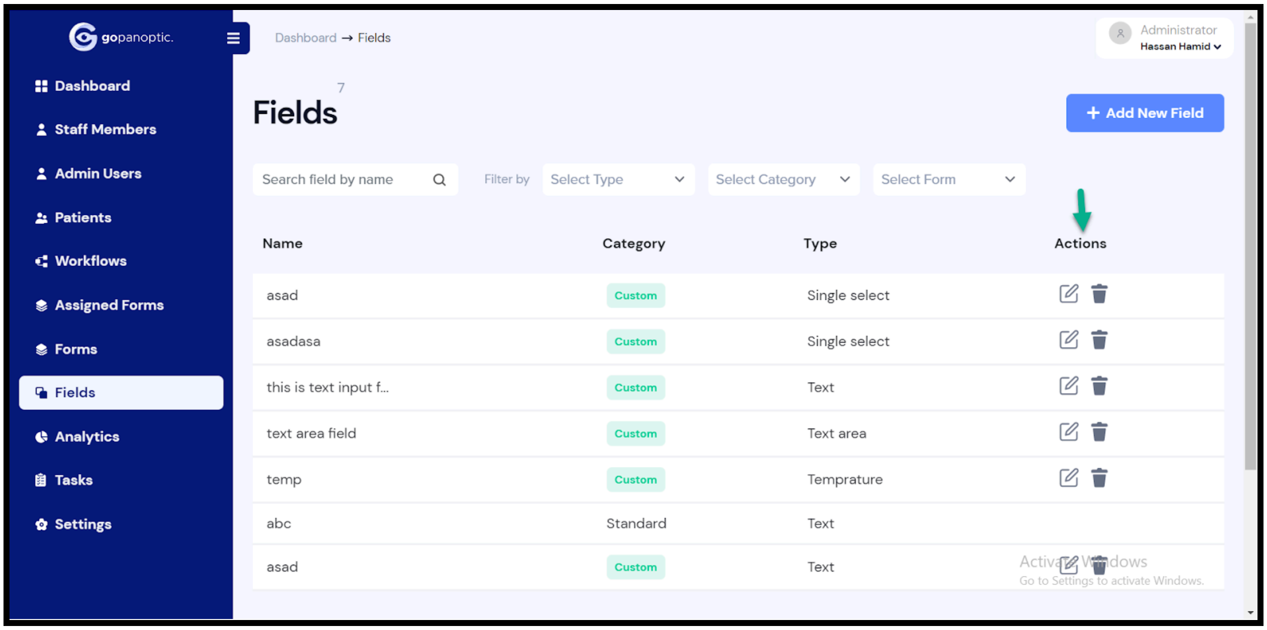
What will happen?
this field that is included in the form section will act as the part of the placeholder in the settings tab.



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

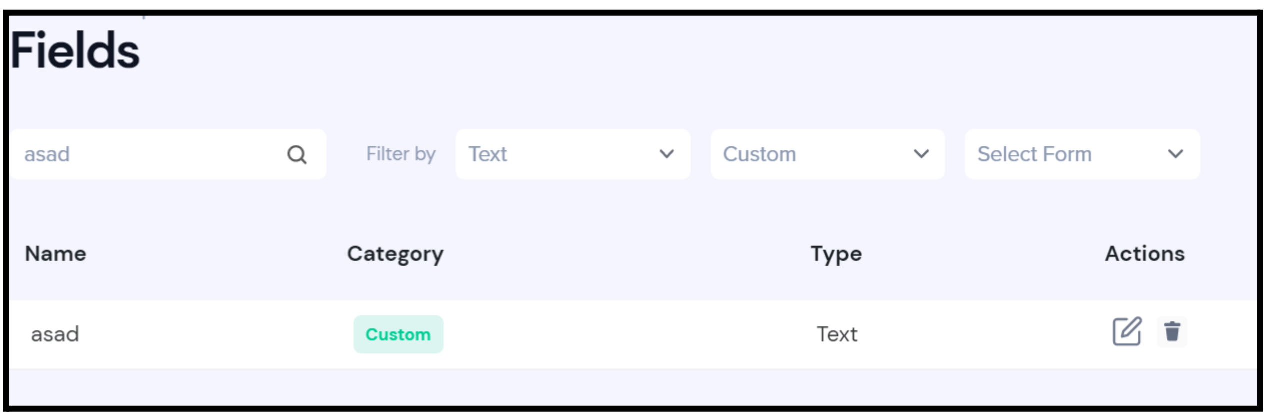
Update and delete fields

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



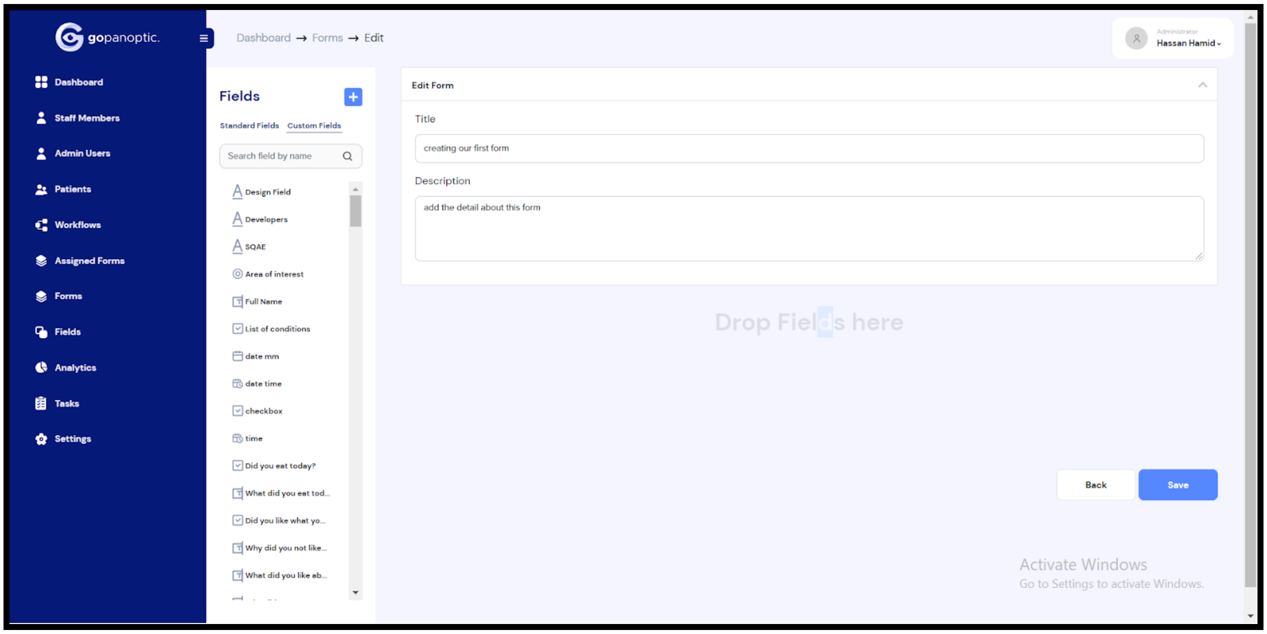
search and filters in fields

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.



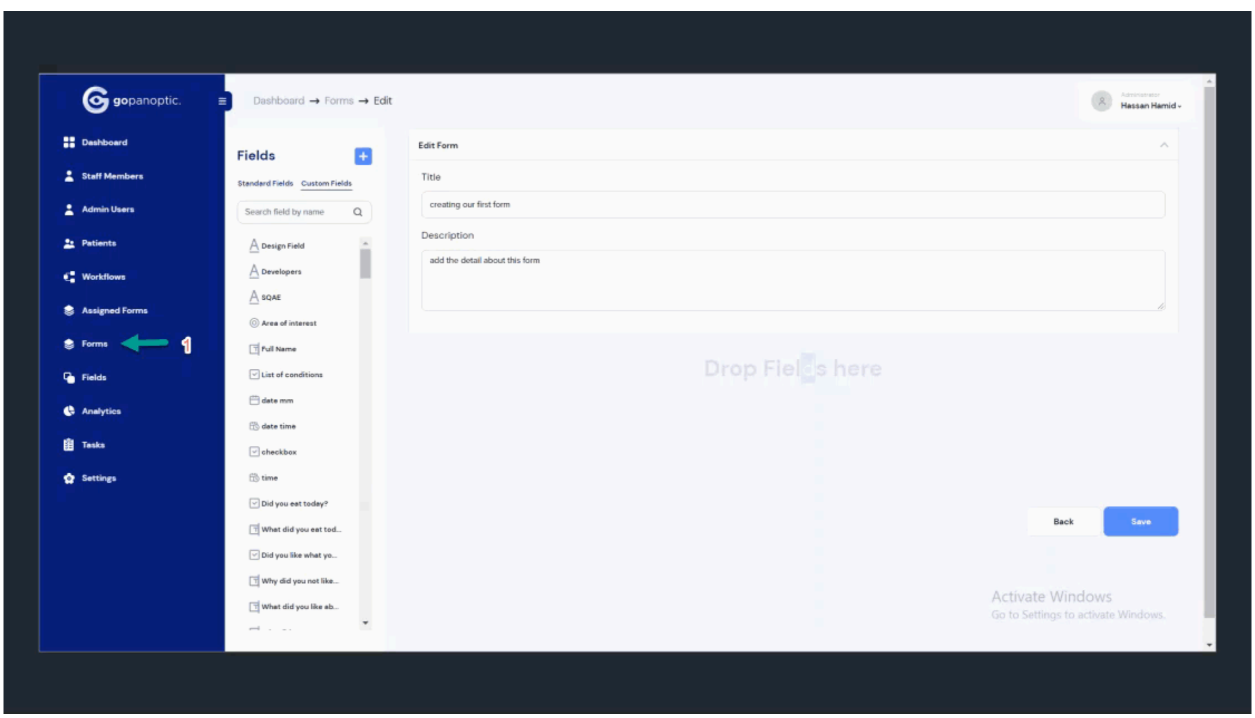
Forms

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.

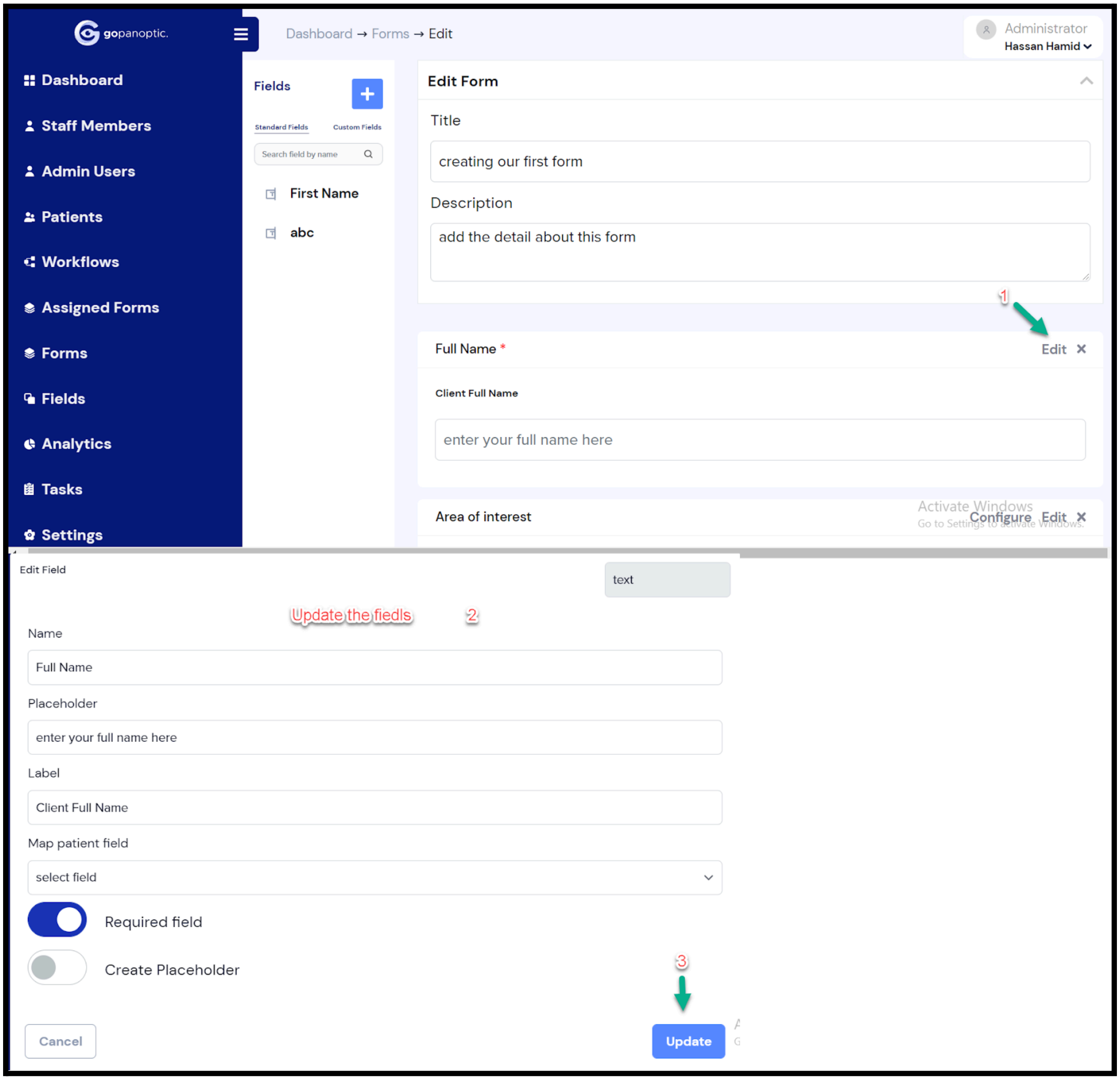


We just need to follow the below steps to create a form.

- 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.

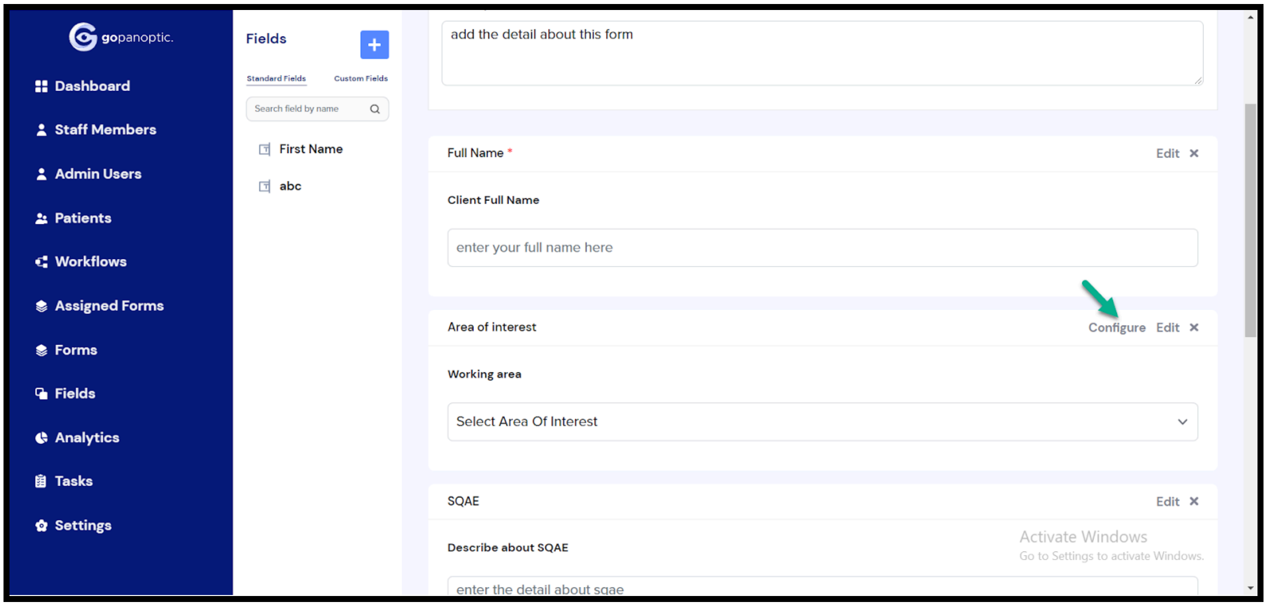


How can we edit/update the fields in the form section?

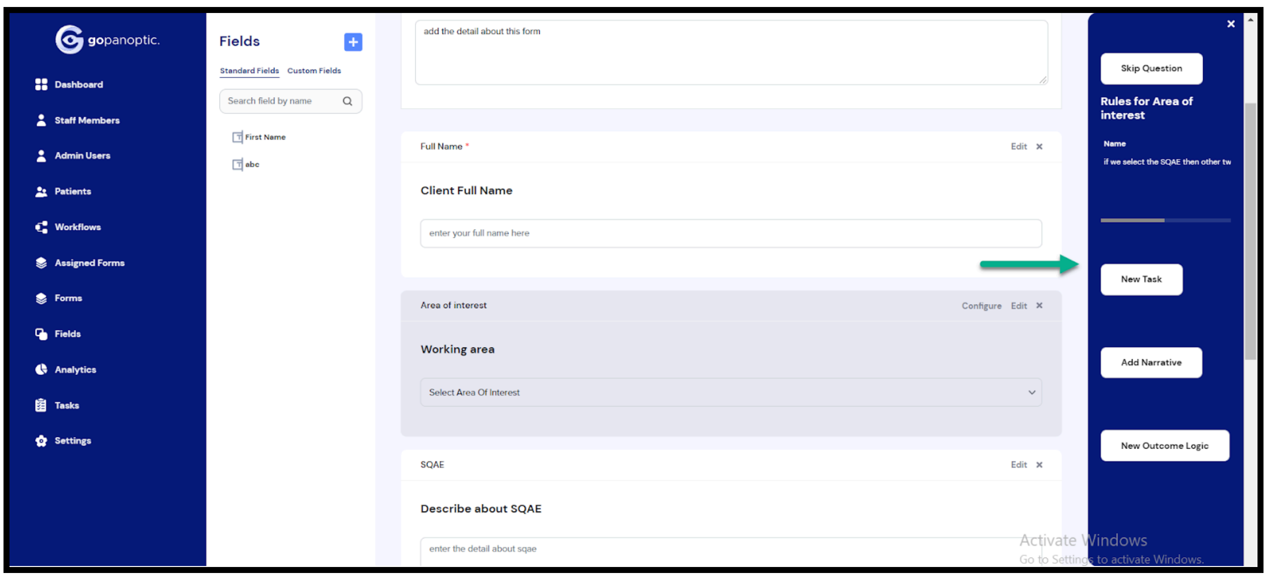


how we can configure our fields.

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.



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

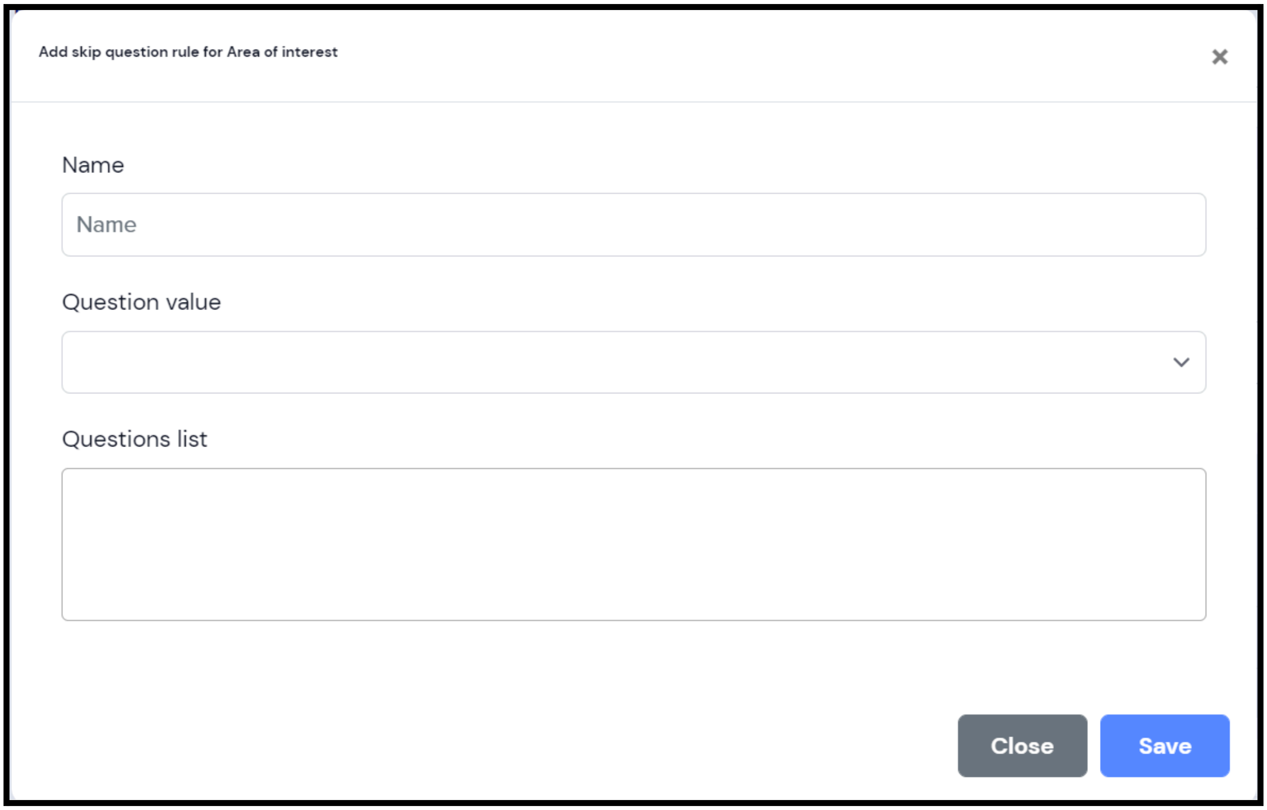


As we can see in the above modal there are four basic options.

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

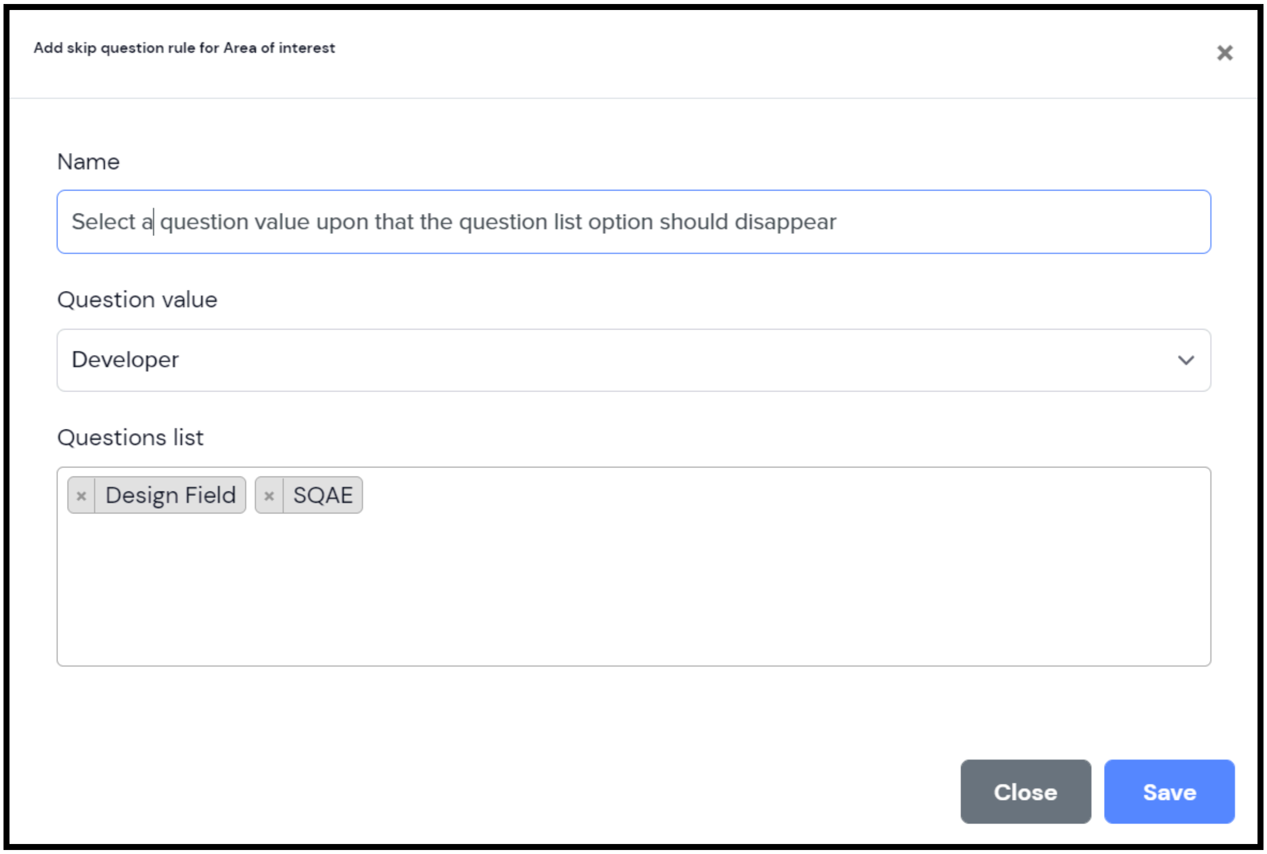
Skip Question

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



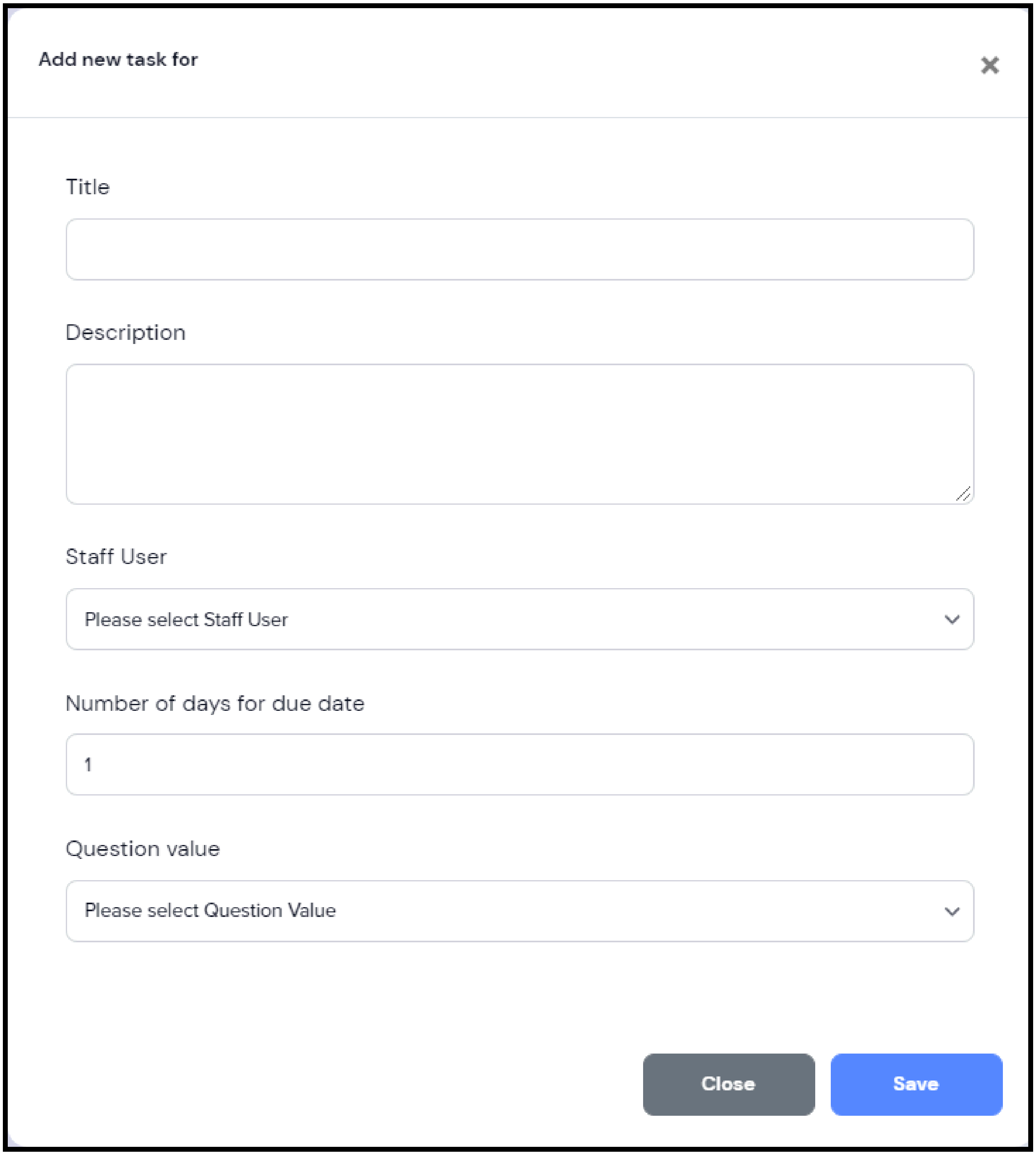
Purpose

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



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

Title

Description

Staff User

Please select Staff User

Number of days for due date

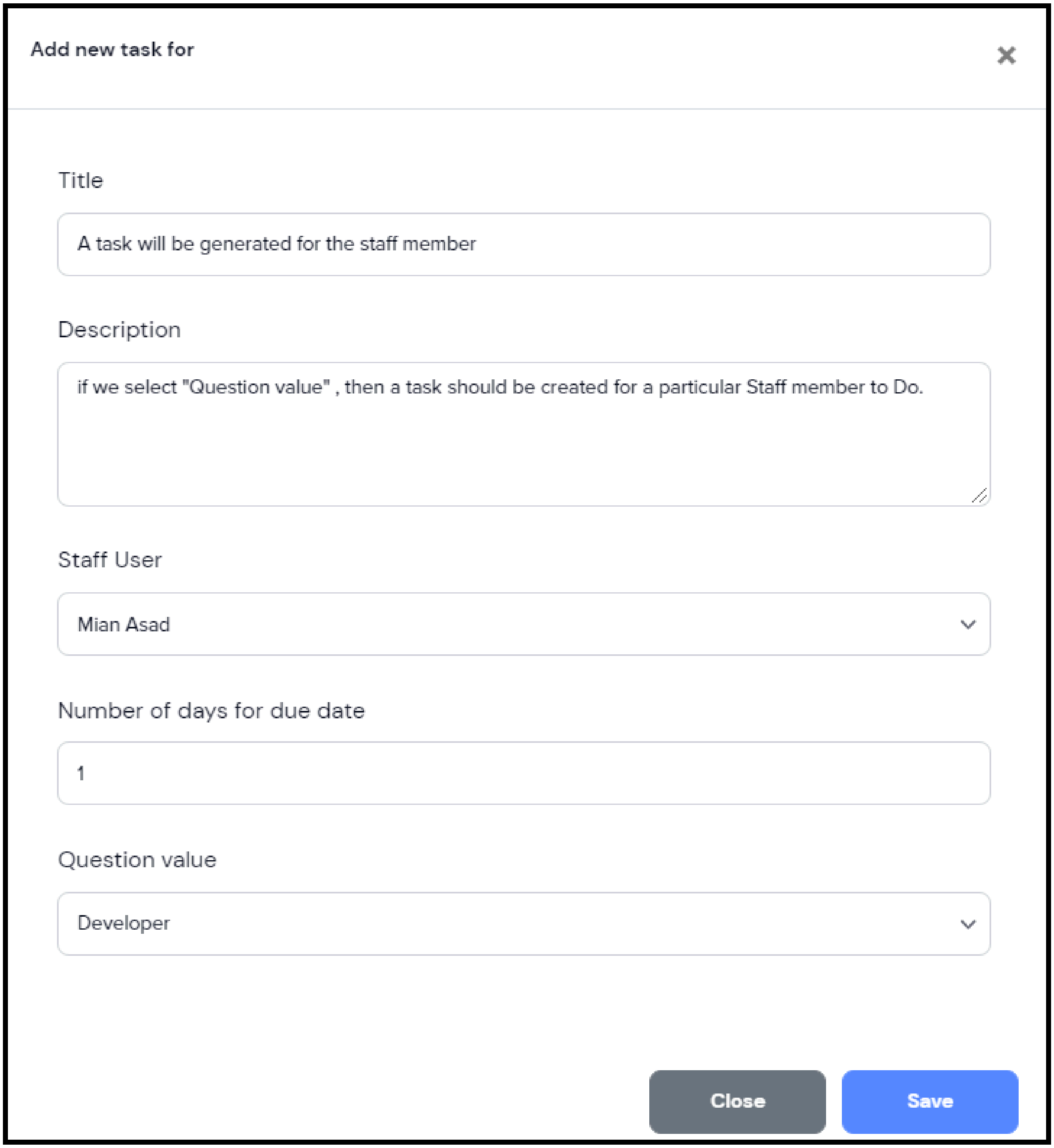
1

Question value

Please select Question Value

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?

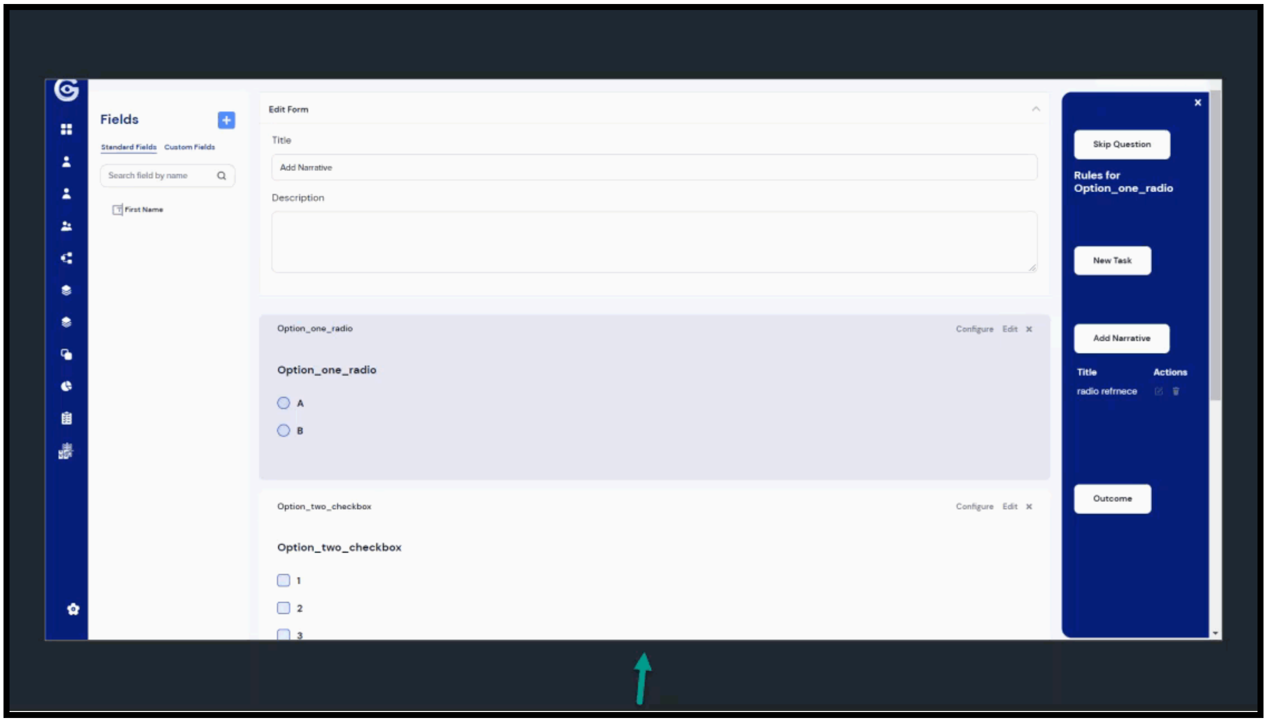
- Radio
- Checkbox
- Single Select
- Multiselect

How to add reference/narrative ?

Note: The above field placeholders must be created.

Follow the below steps

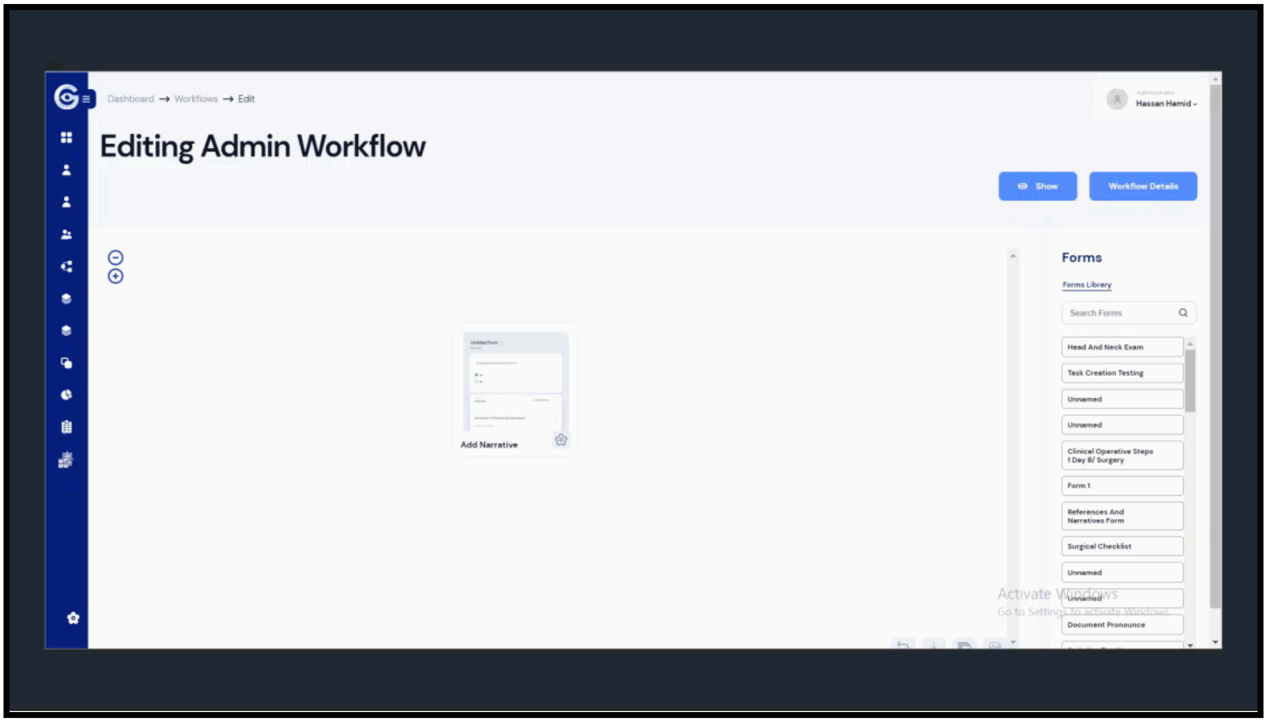
1. Add a new form.
2. Add above fields/or any one of the above fields into the form.
3. Click on Configure Option.
4. Click on Add Narrative.
5. A pop up modal will appear.
6. Add detail into the editor section, select the value , add reference against that value. And click on the save button.



In this way You can create a reference for above fields

How will the references be Printed?

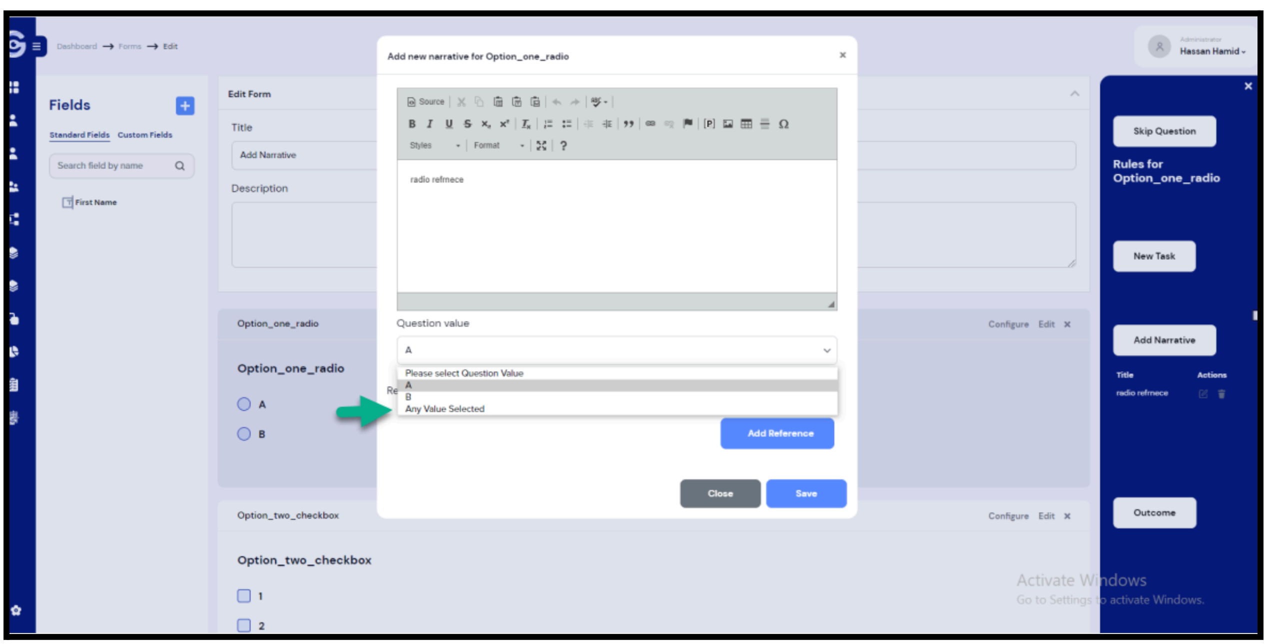
1. Go to workflows
2. Create a new workflow.
3. Add the form that has references fields.
4. Click on Documents.
5. Enter the name of doc, priority, Select the reviewer (staff member)
6. In the editor section add the detail if you want , and here add the placeholder of fields that contain references.
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.

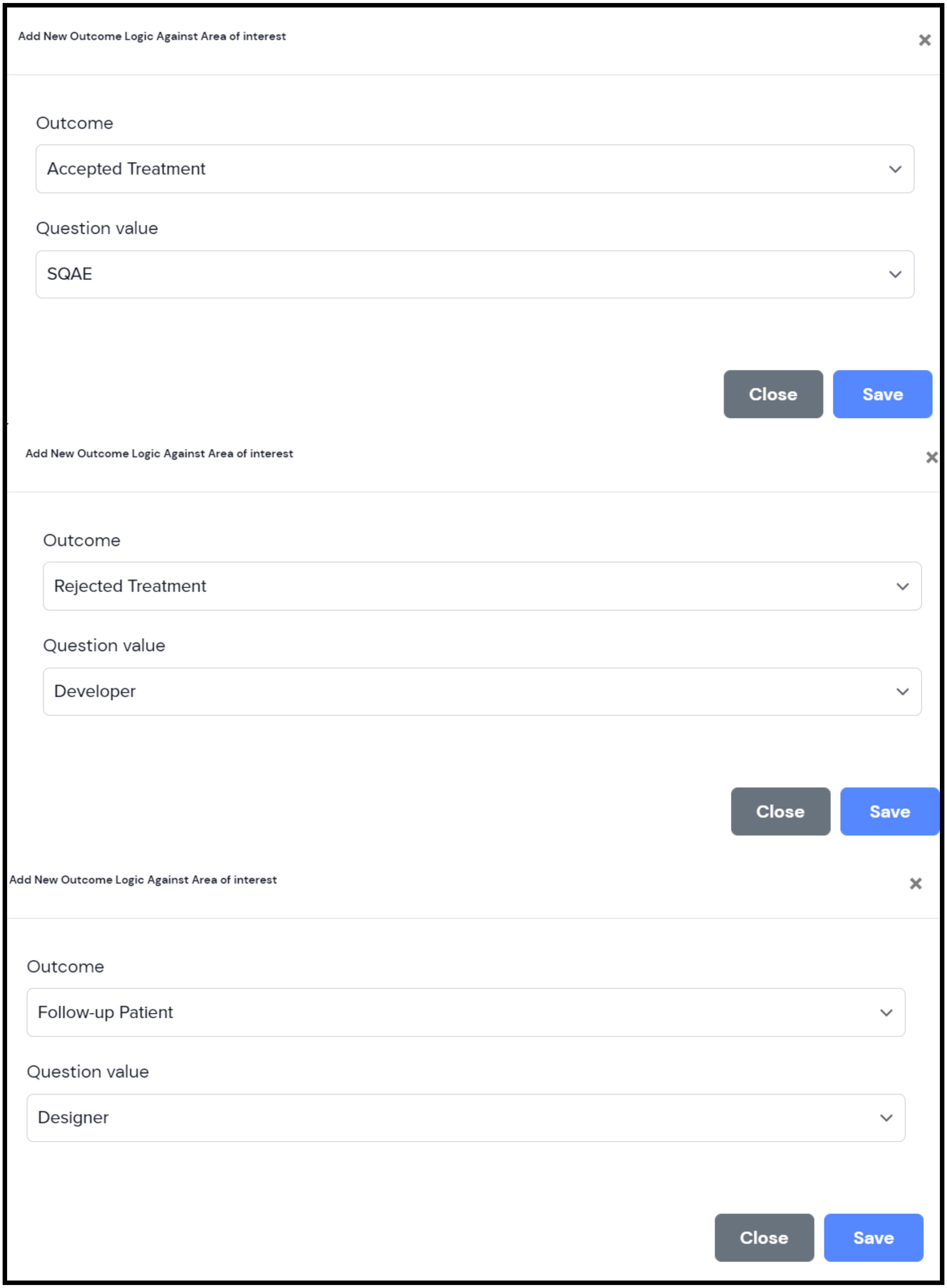
If we click on this option, a pop up modal will appear for that particular field we are going to configure. See below

We have following 3 types of outcomes (by default)

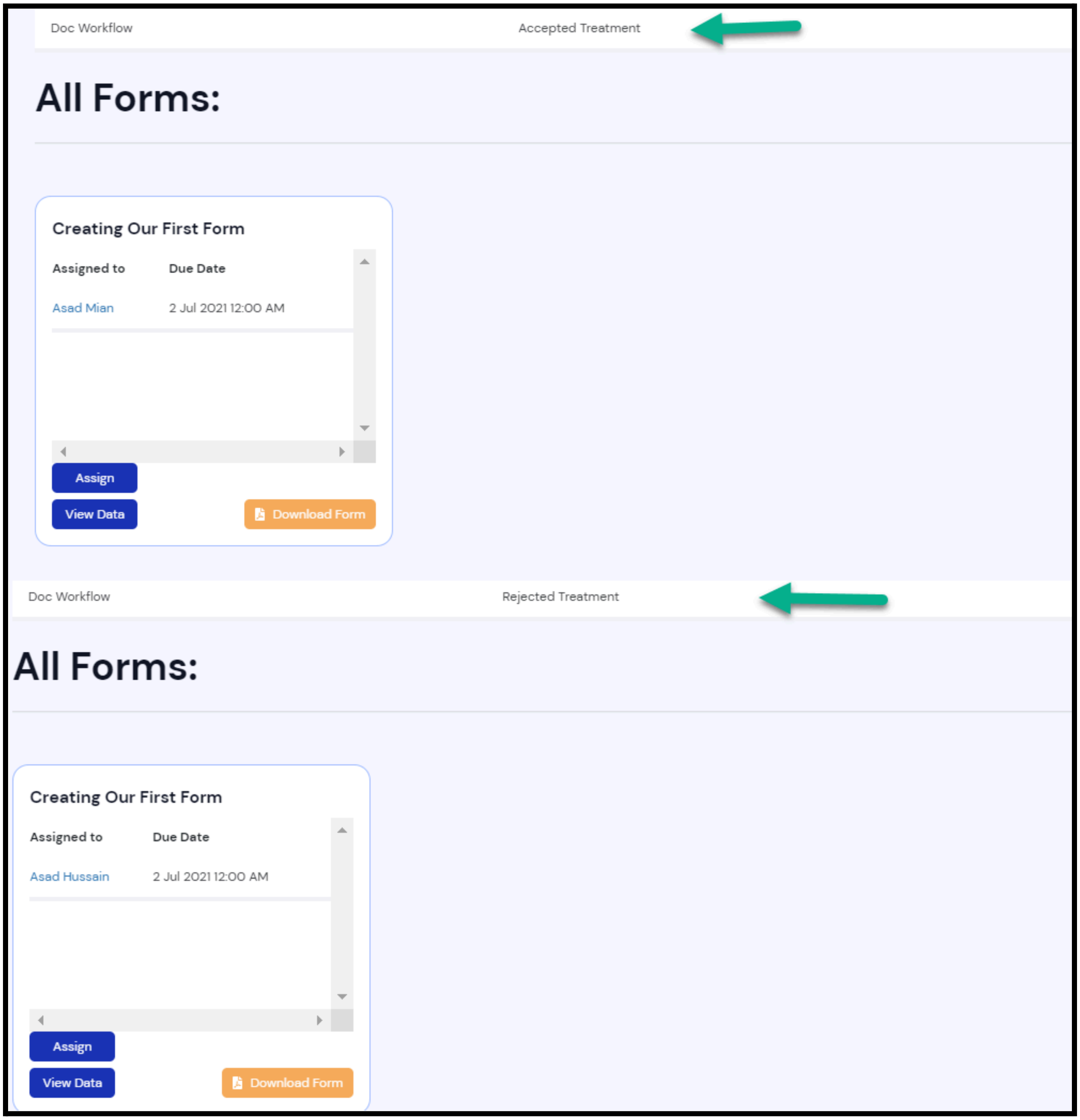
- Accept treatment.
- Rejected Treatment.
- Follow-up Patient.

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.

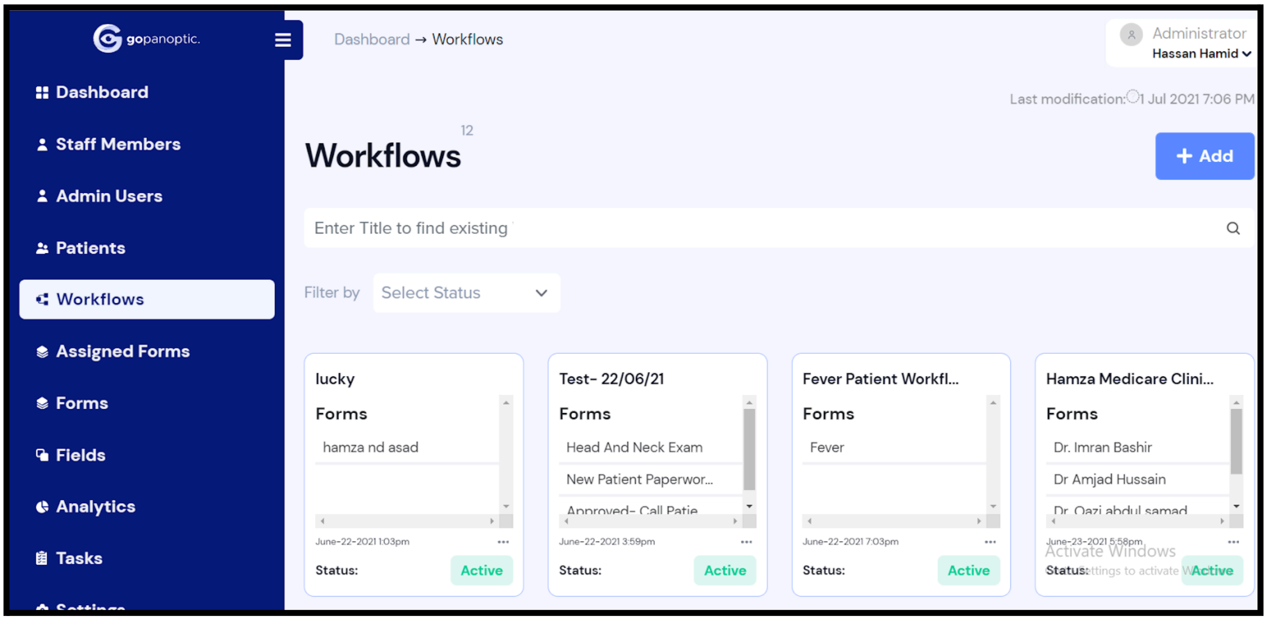

Add New Outcome Logic Against Area of interest
Outcome
Accepted Treatment
Question value
SQAE
Close
Save
Add New Outcome Logic Against Area of interest
Outcome
Rejected Treatment
Question value
Developer
Close
Save
Add New Outcome Logic Against Area of interest
Outcome
Follow-up Patient
Question value
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.



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.



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.

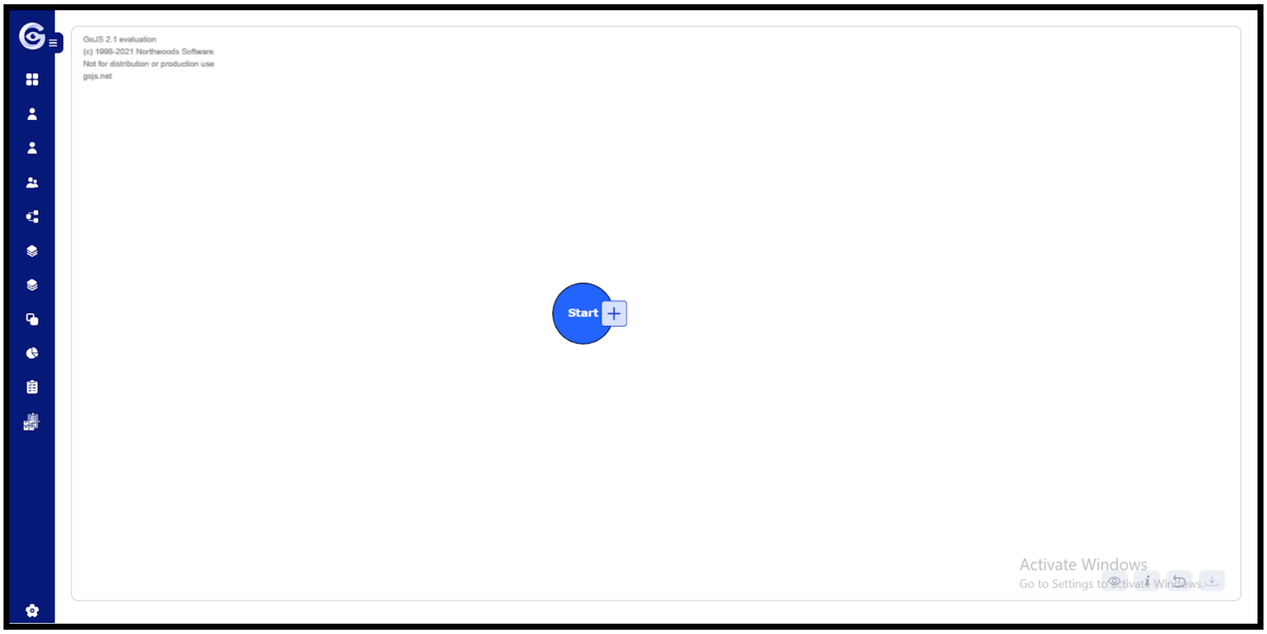
New Form

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.

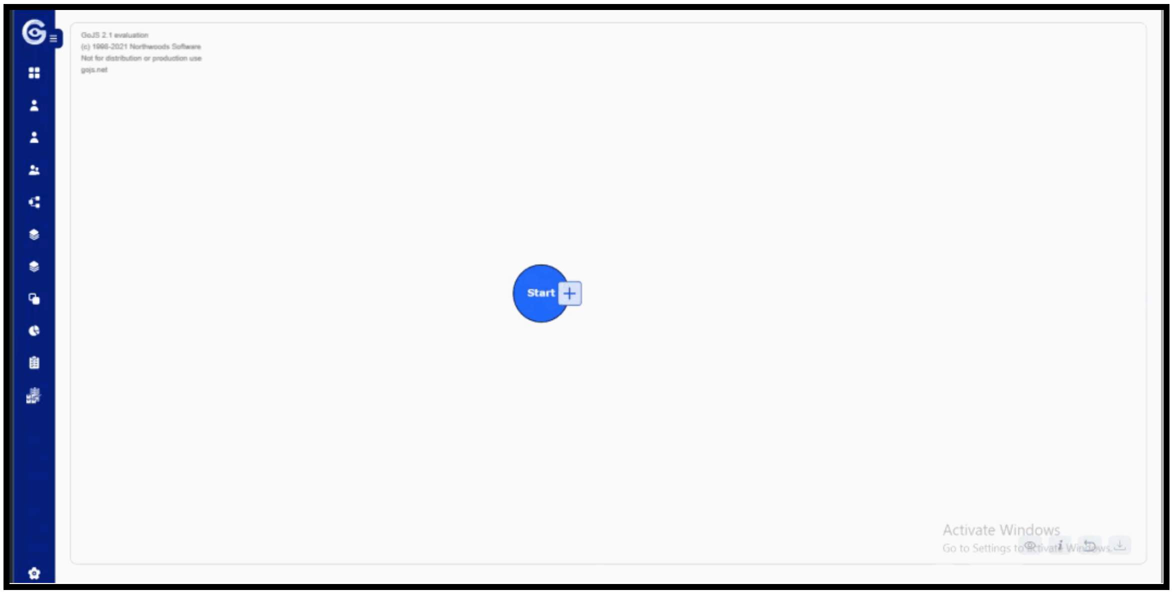


Let me explain to you about this.

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

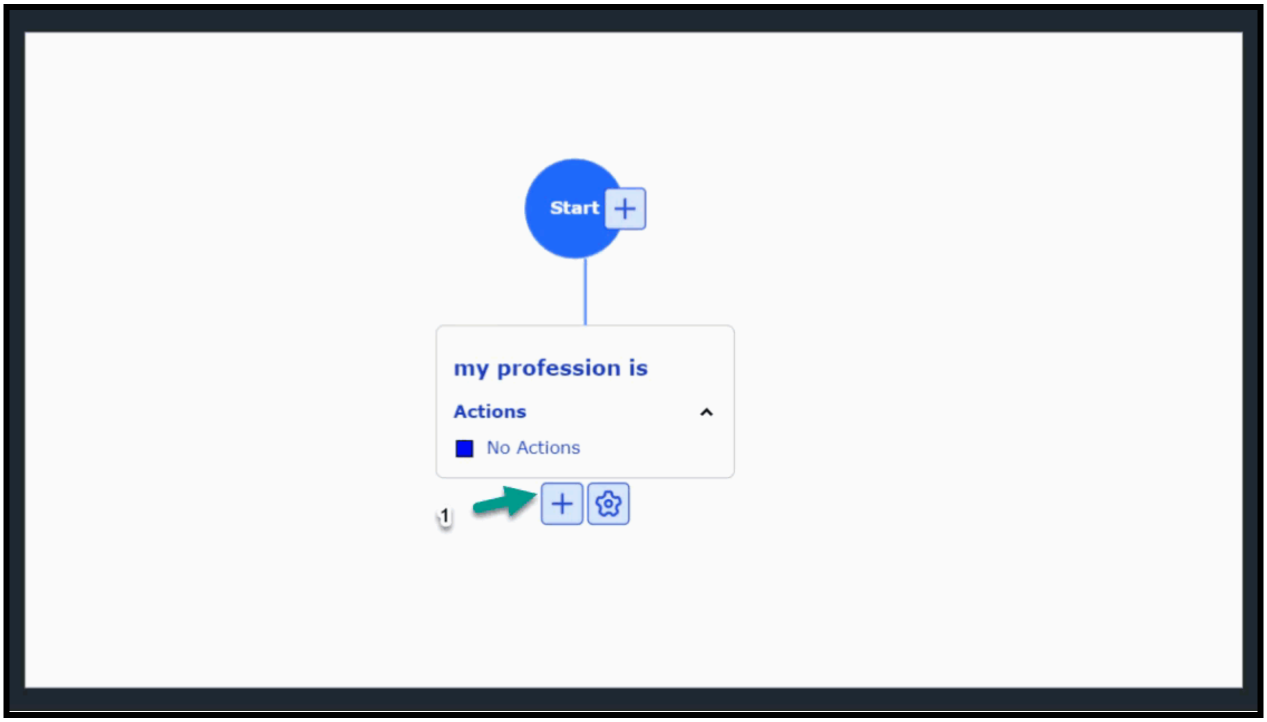
- Click on Plus sign with start and it will open a side modal.
- Select A form (New Form/External Form).
- Click on the Create button at the bottom of this side modal.



Branching

Ifor 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.



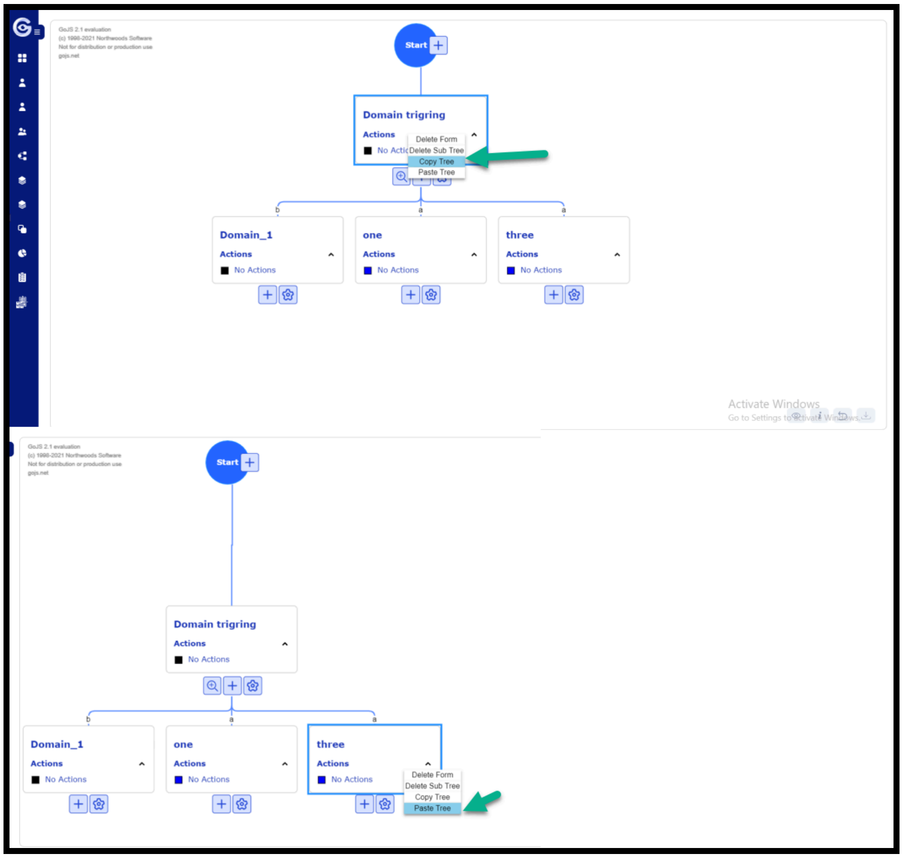
Copy & Paste Tree

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).

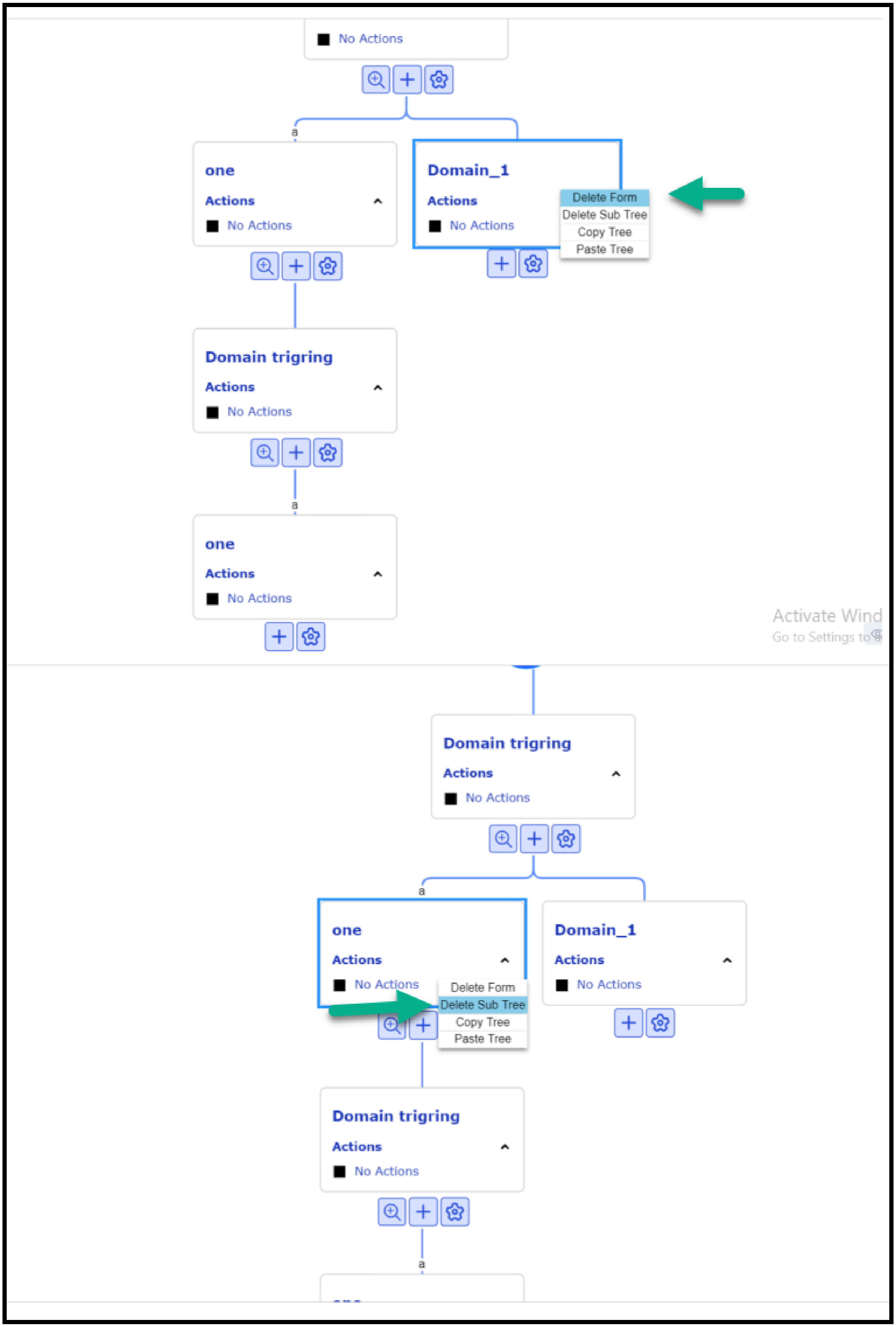
How its works

- 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.

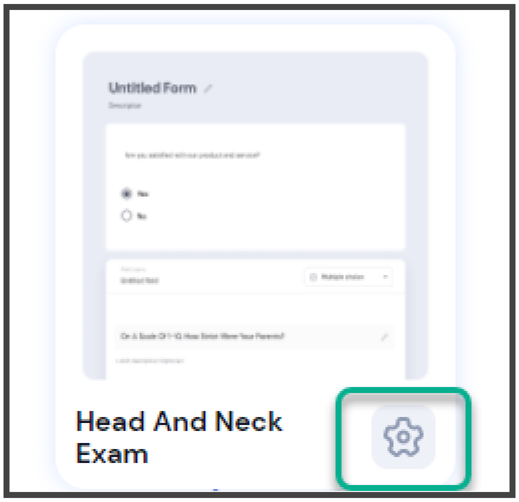


Delete Form & Delete Subtree

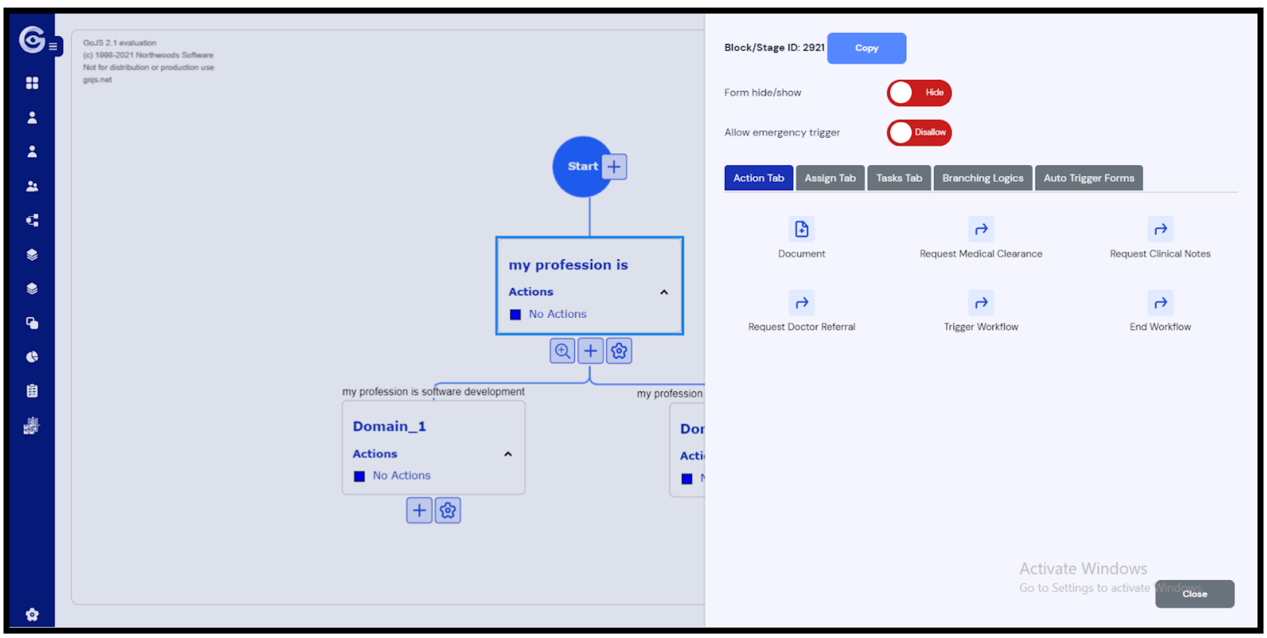
You can delete an individual form , or multiple by selecting forms, and clicking on sub Delete form and delete tree option as well.


No Actions
a
one
Actions
No Actions
Domain_1
Actions
No Actions
Delete Form
Delete Sub Tree
Copy Tree
Paste Tree
Domain trigring
Actions
No Actions
a
one
Actions
No Actions
Activate Wind
Go to Settings to
Domain trigring
Actions
No Actions
a
one
Actions
No Actions
Delete Form
Delete Sub Tree
Copy Tree
Paste Tree
Domain_1
Actions
No Actions
Domain trigring
Actions
No Actions
a

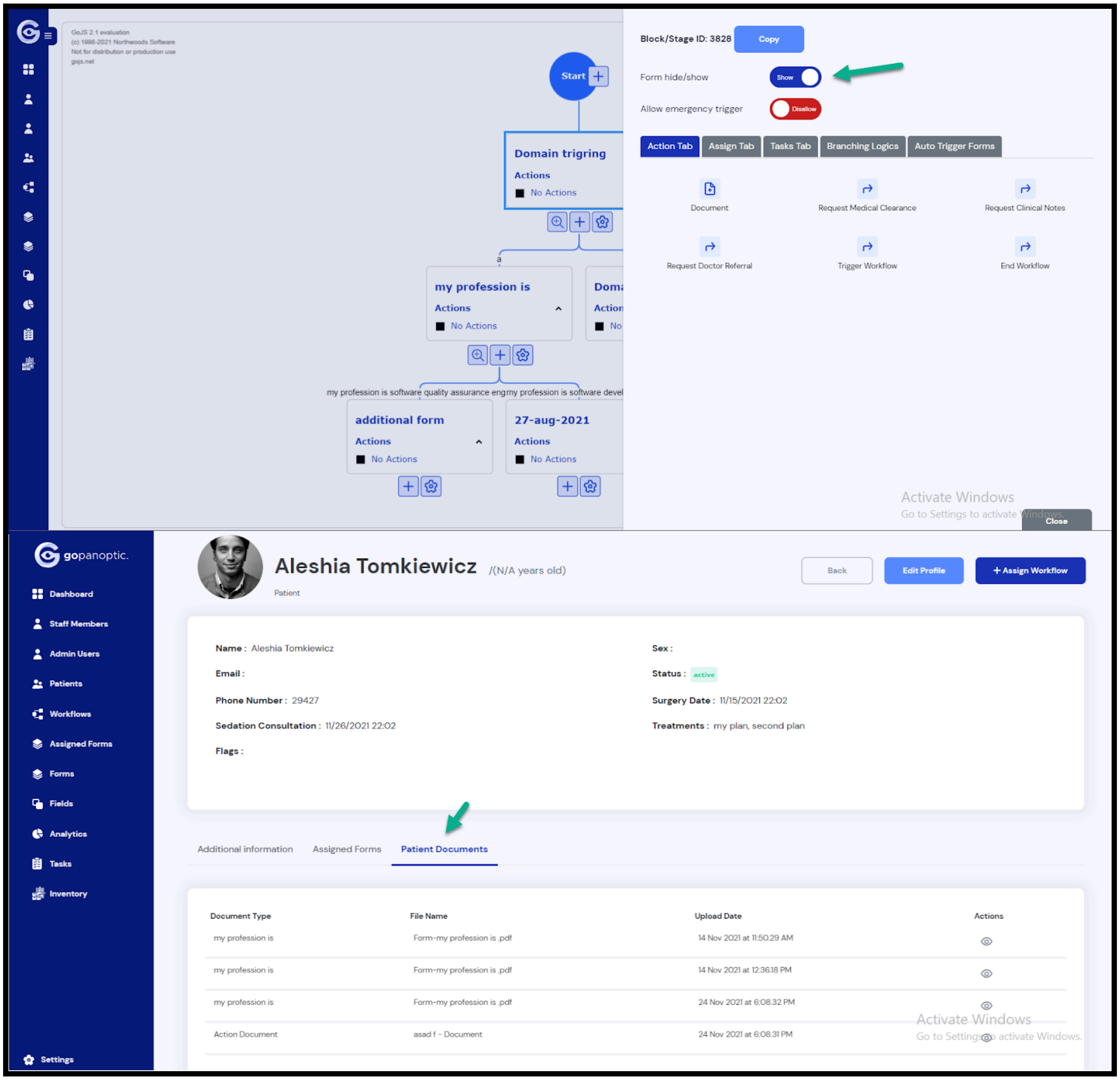
Forms setting options in workflow



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

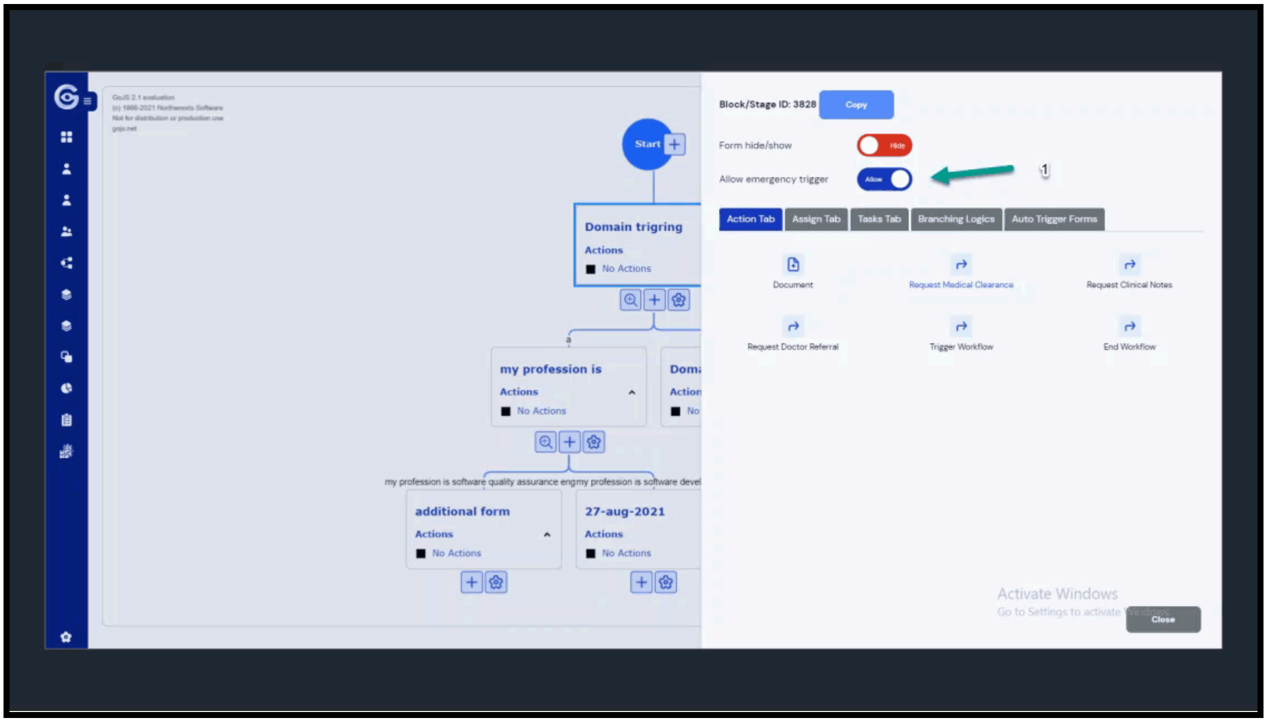


Block Stage ID: this is showing the id of the current form, you can copy this id as well.
Form hide/show: on default this toggle option will be off, if you turn this on , when staff members fill this for a patient , all the information will be shown in the patient document section of this form.



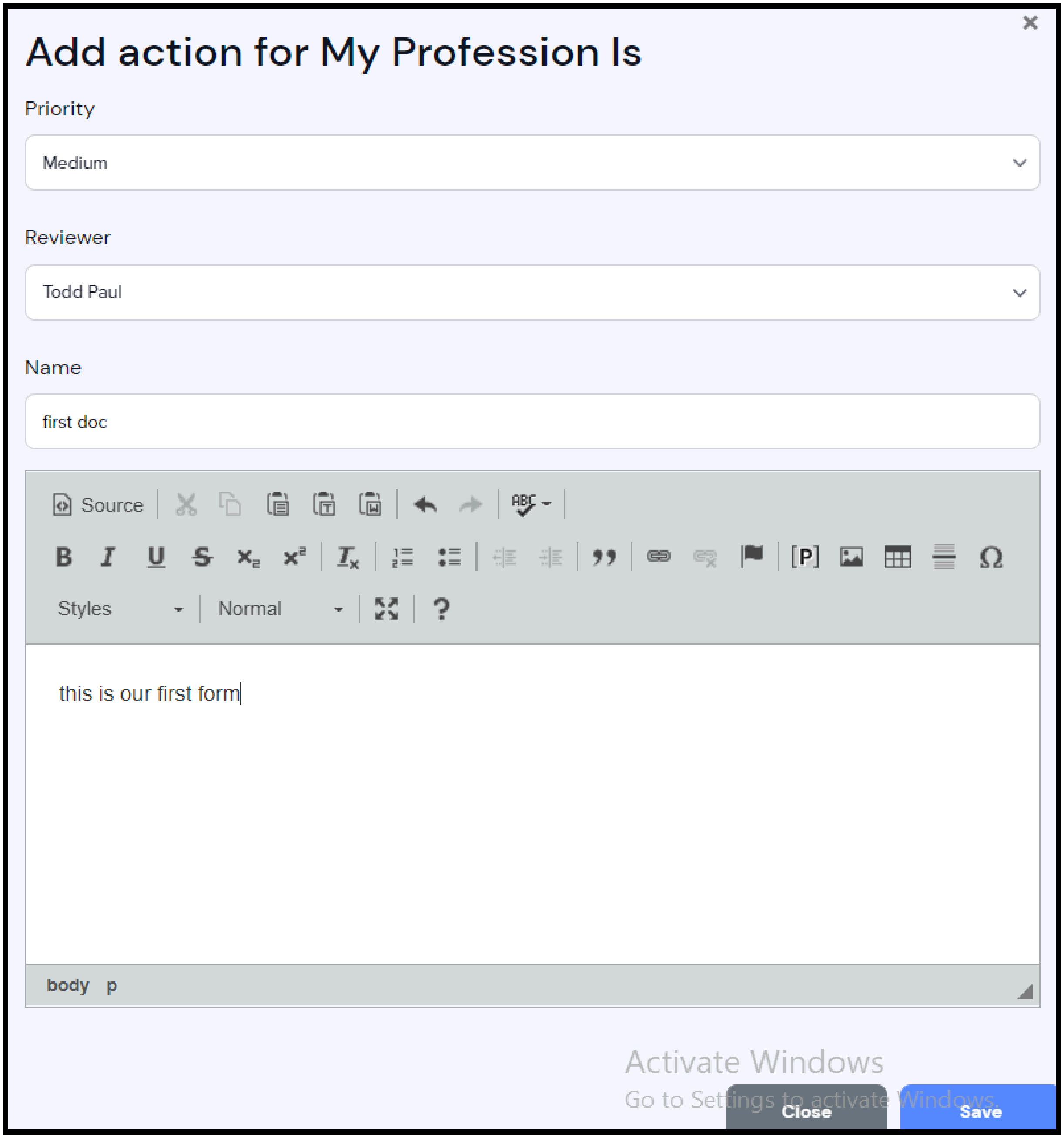
If the user clicks on the “eye” icon in the action column it will be downloaded , and the user can see the submitted details of that particular form.

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.



Documents pronounce

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.

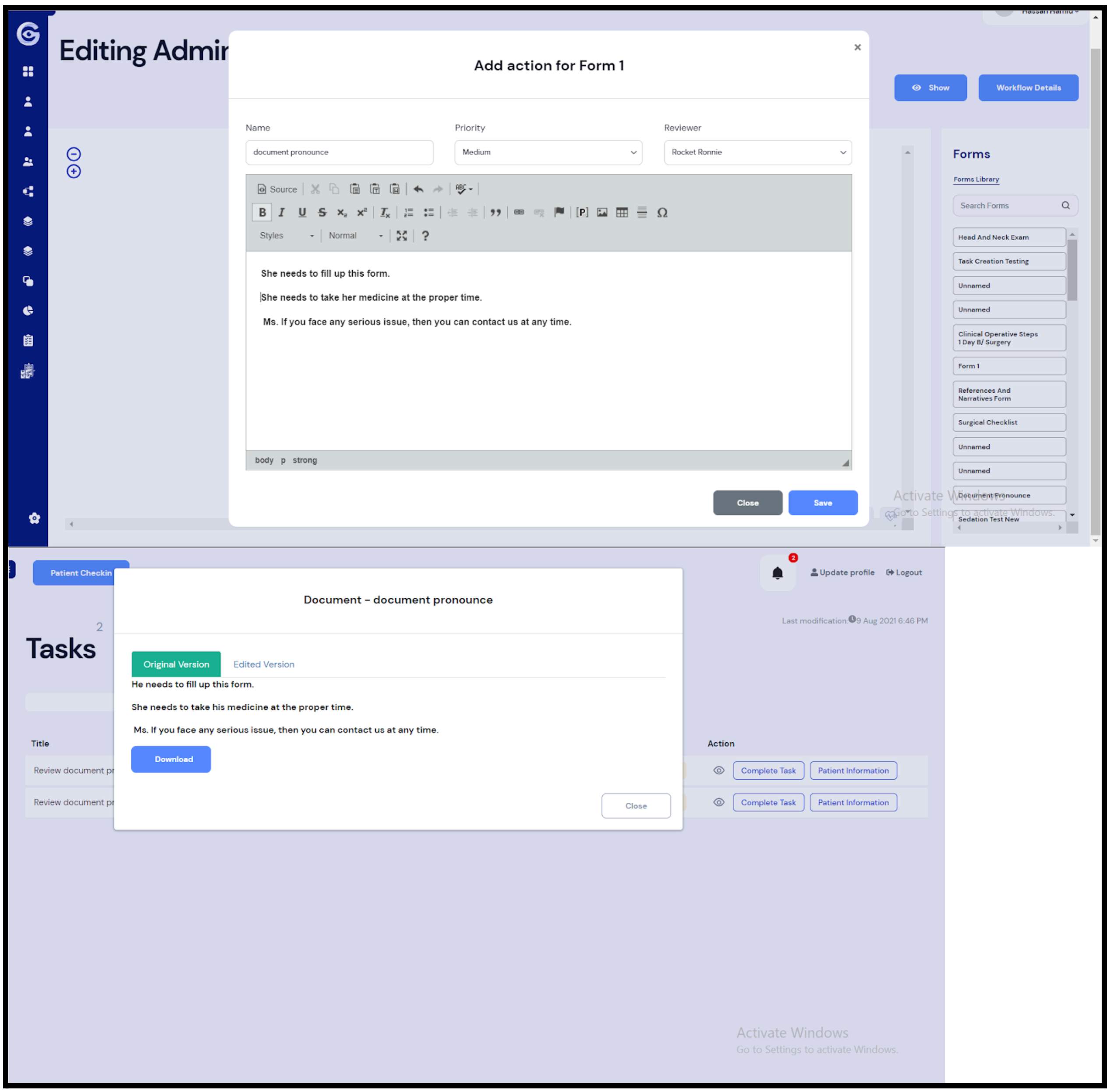
Example:

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.

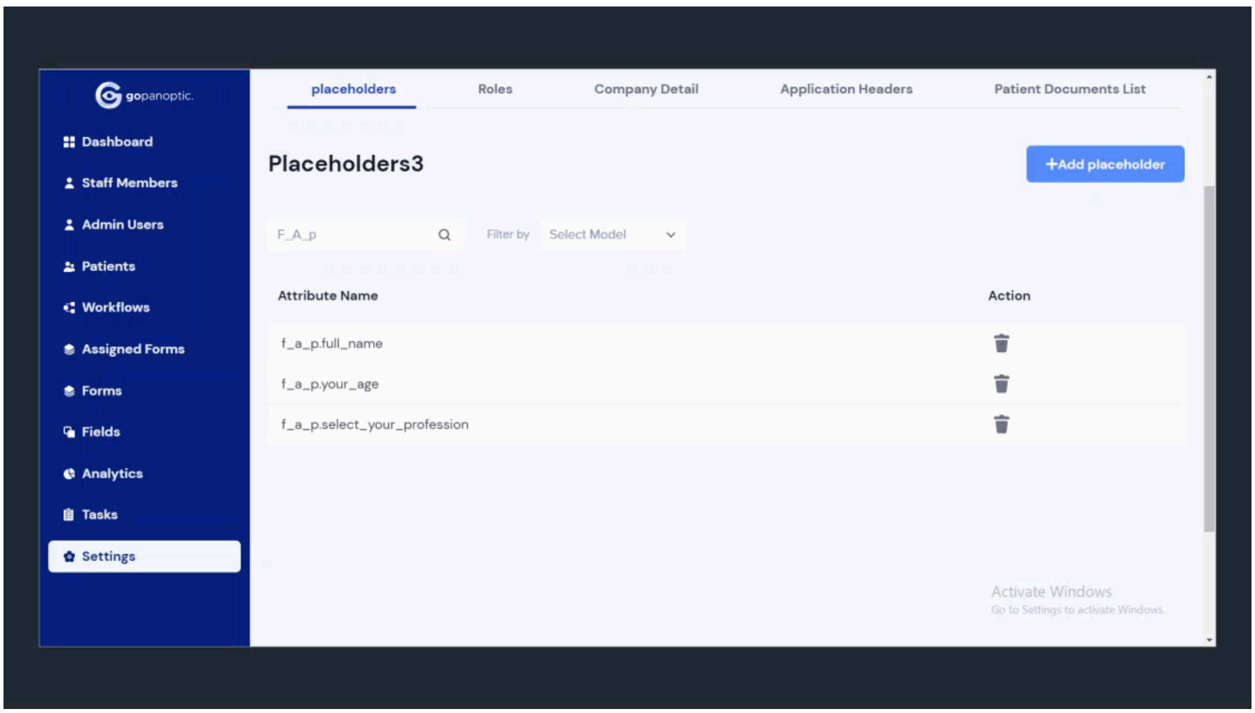


Note: in some of the cases Note: This may not apply on. formatted text. Such as bold, italic etc.

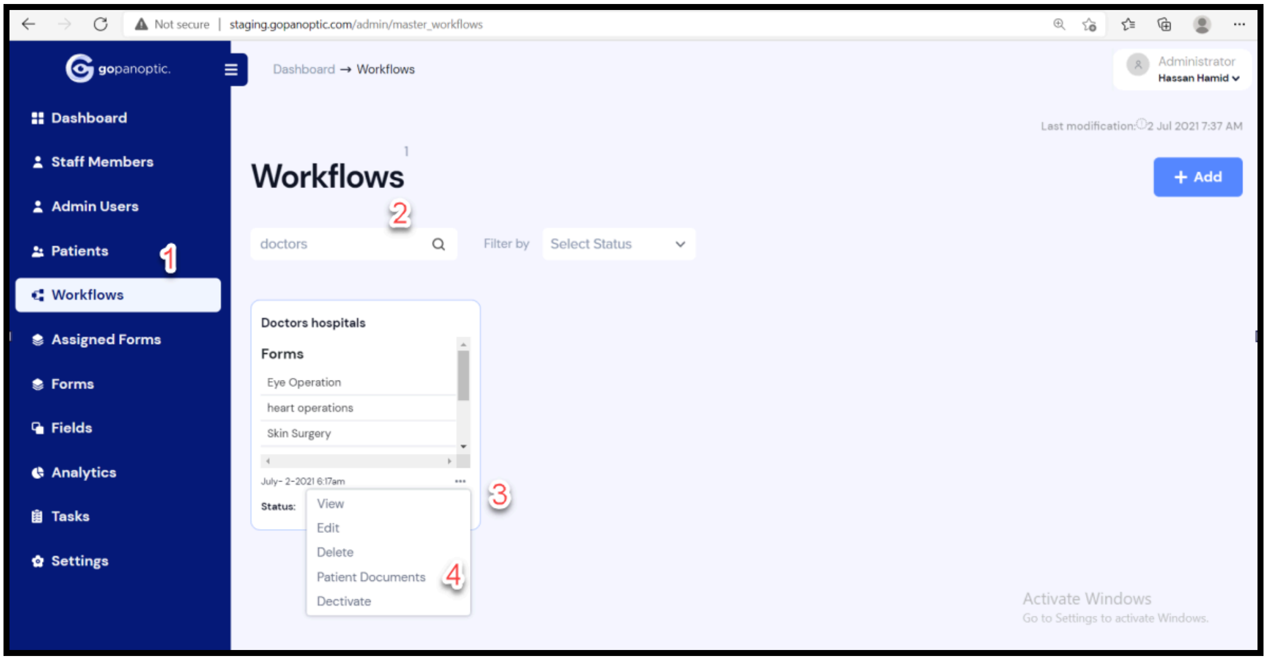
How we can use placeholders in documnets

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.

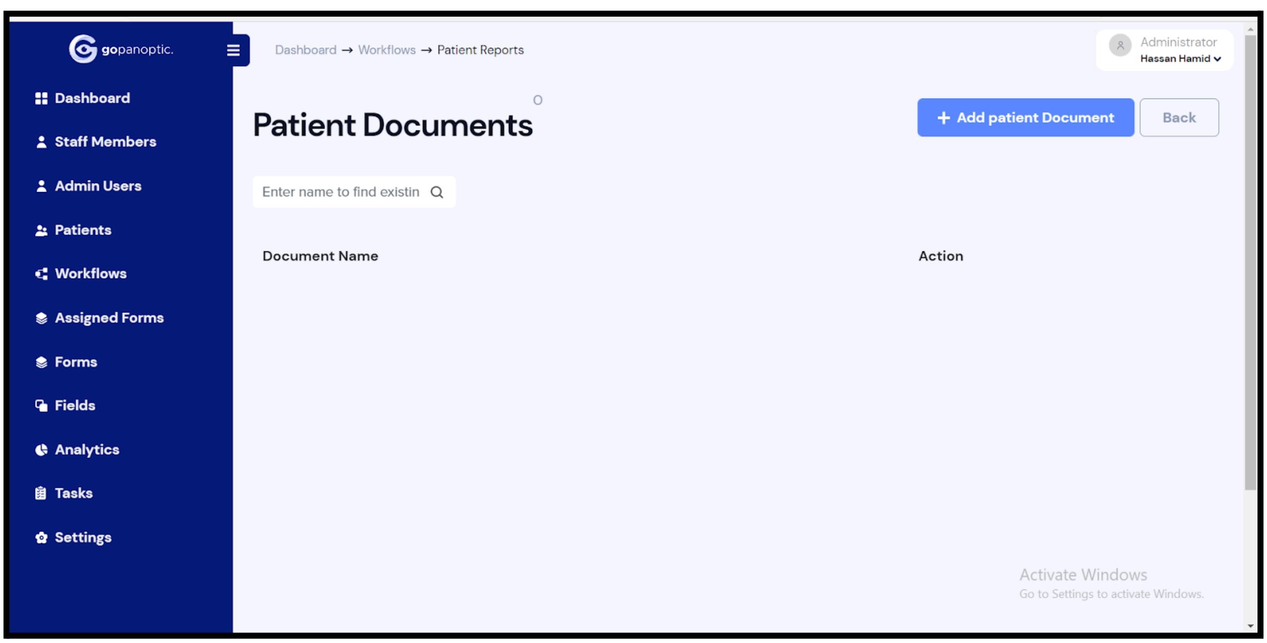


We can also create a document in another way. Let's See how we can do this.



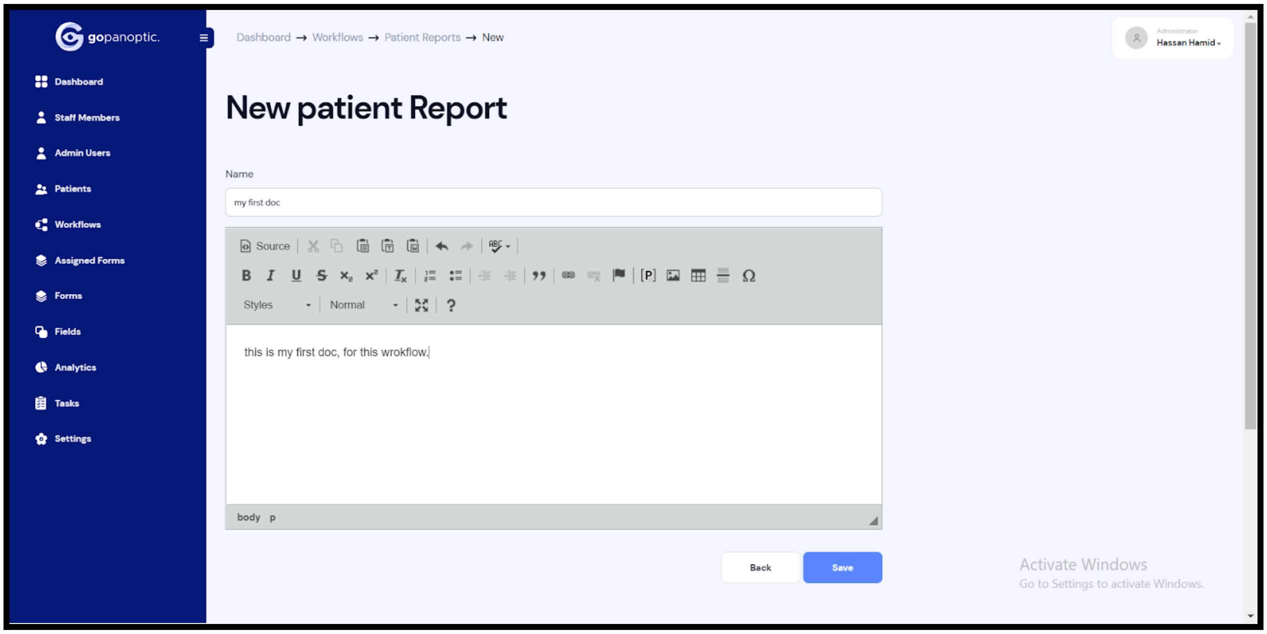
- ☐ Click on workflows.
- ☐ In the search field type the name of your workflow.
- ☐ Click on ... option.
- ☐ Click on "**Patient Document**".

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

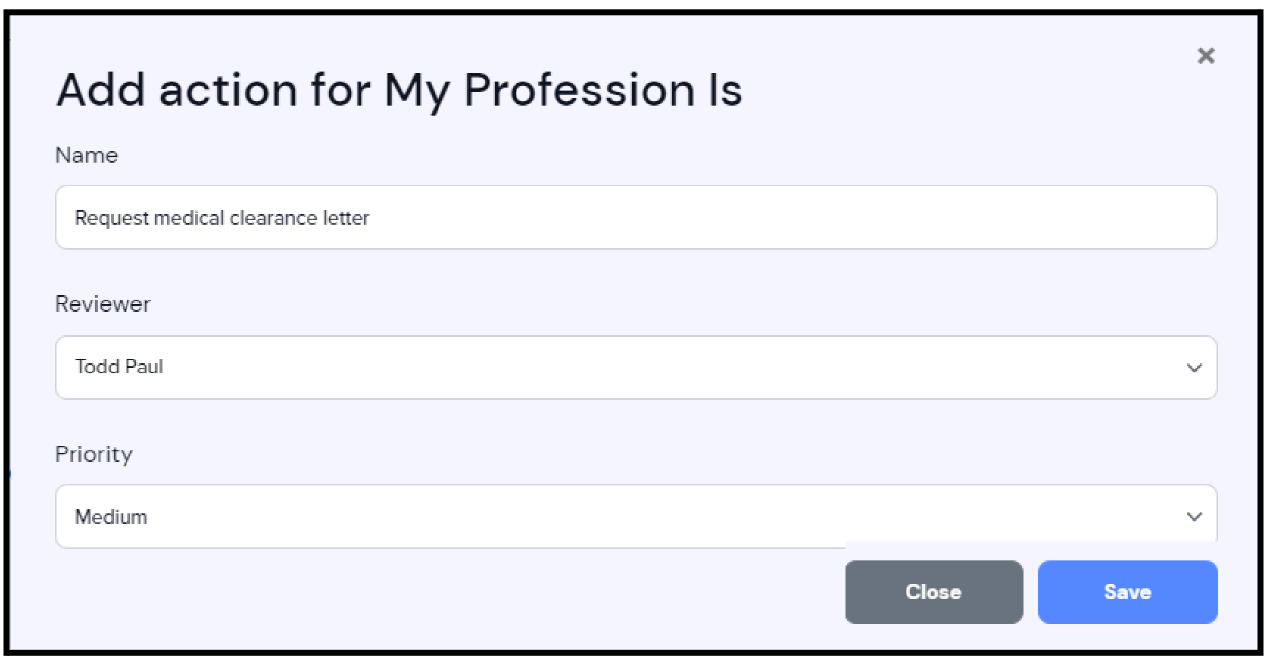


Click on the "**+ Add patient document**" button.

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

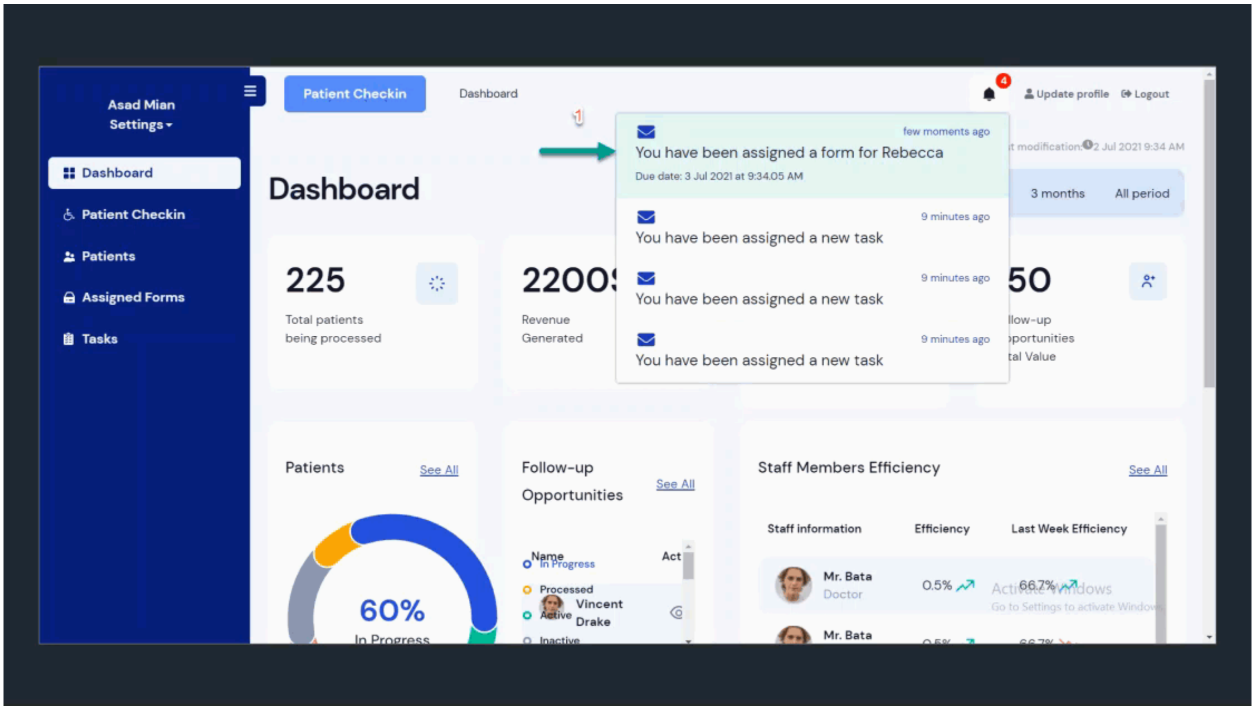


Request Medical Clearance
When you click on this a side modal will appear, enter the name and select a reviewer & priority.

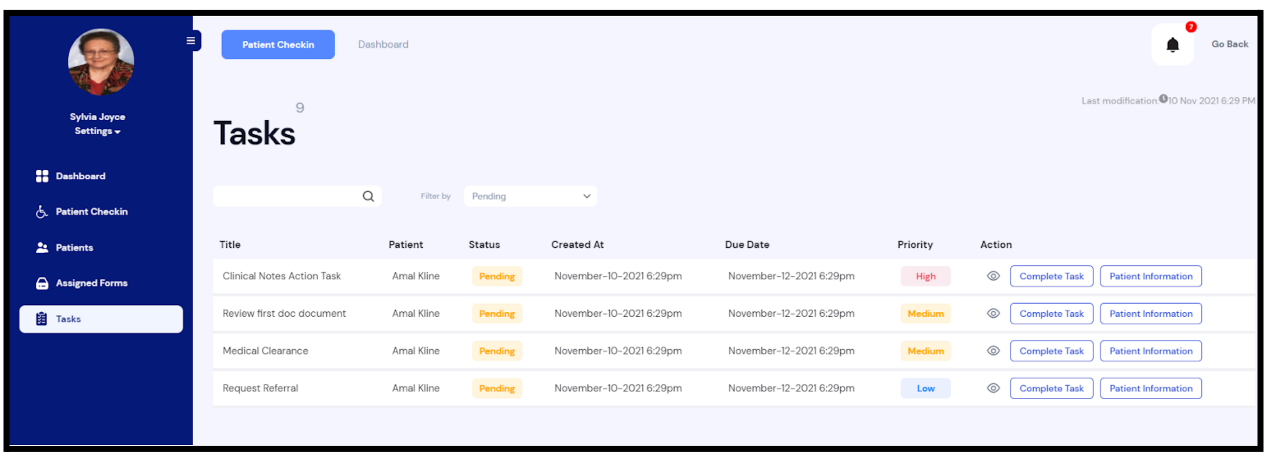


What will happen after doing the above activity?

- 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.

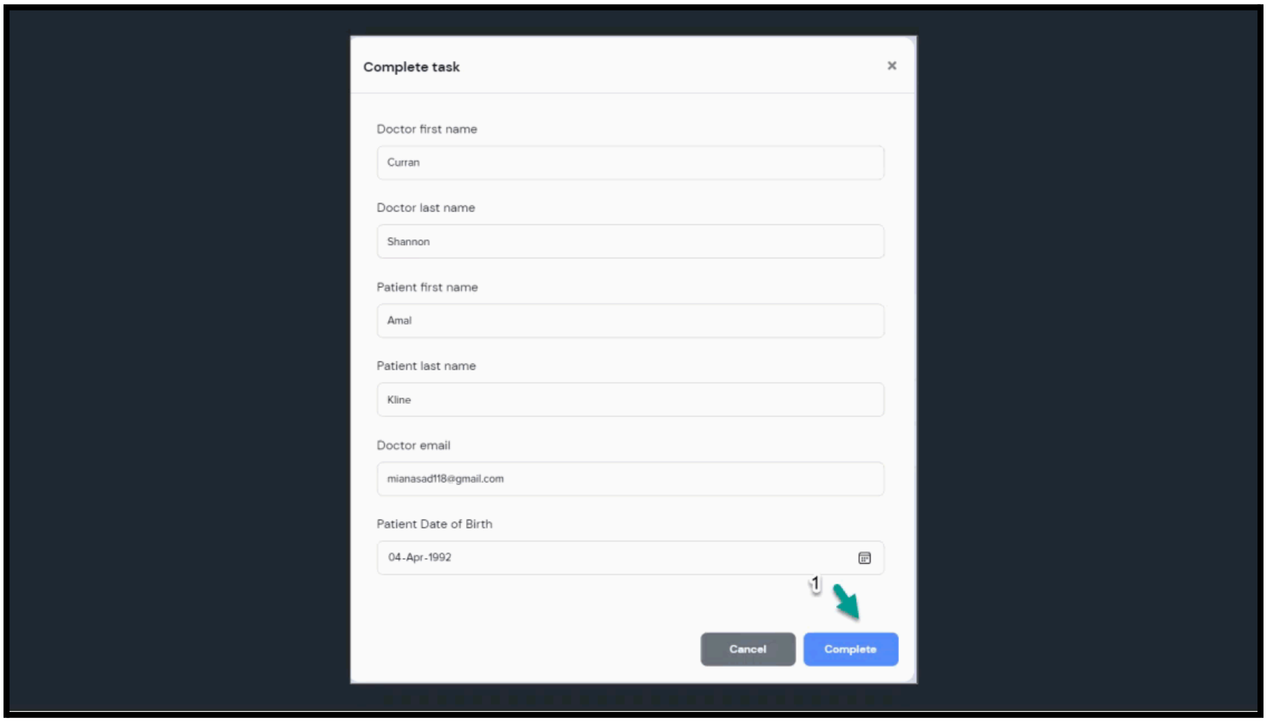


After doing above steps successfully, then in "tasks" section will created for the assigned reviewer for "**Request Medical Clearance**"



- 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

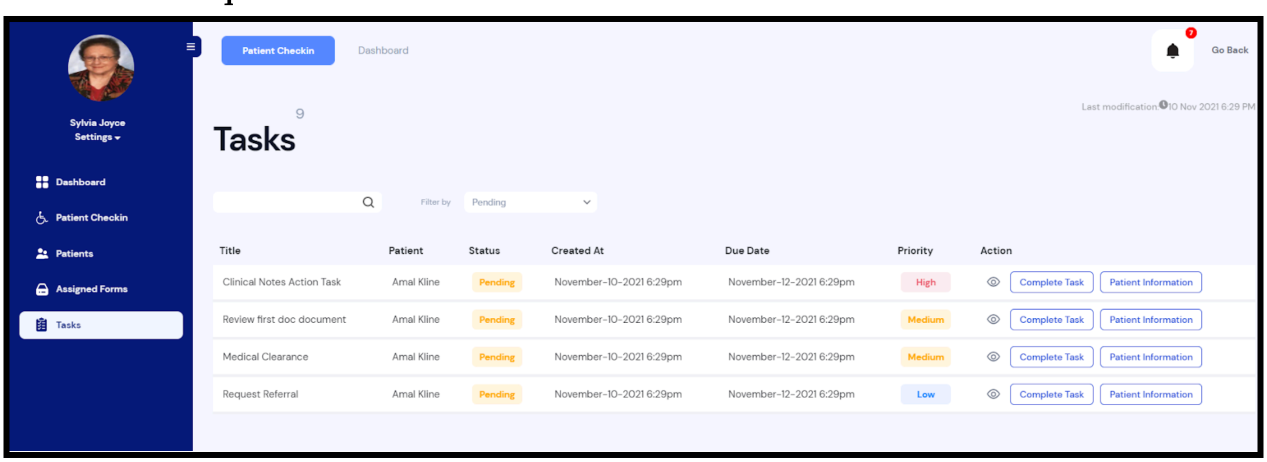
When you click on this a side modal will appear, enter the name and select a reviewer priority.

What will happen after doing the above activity?

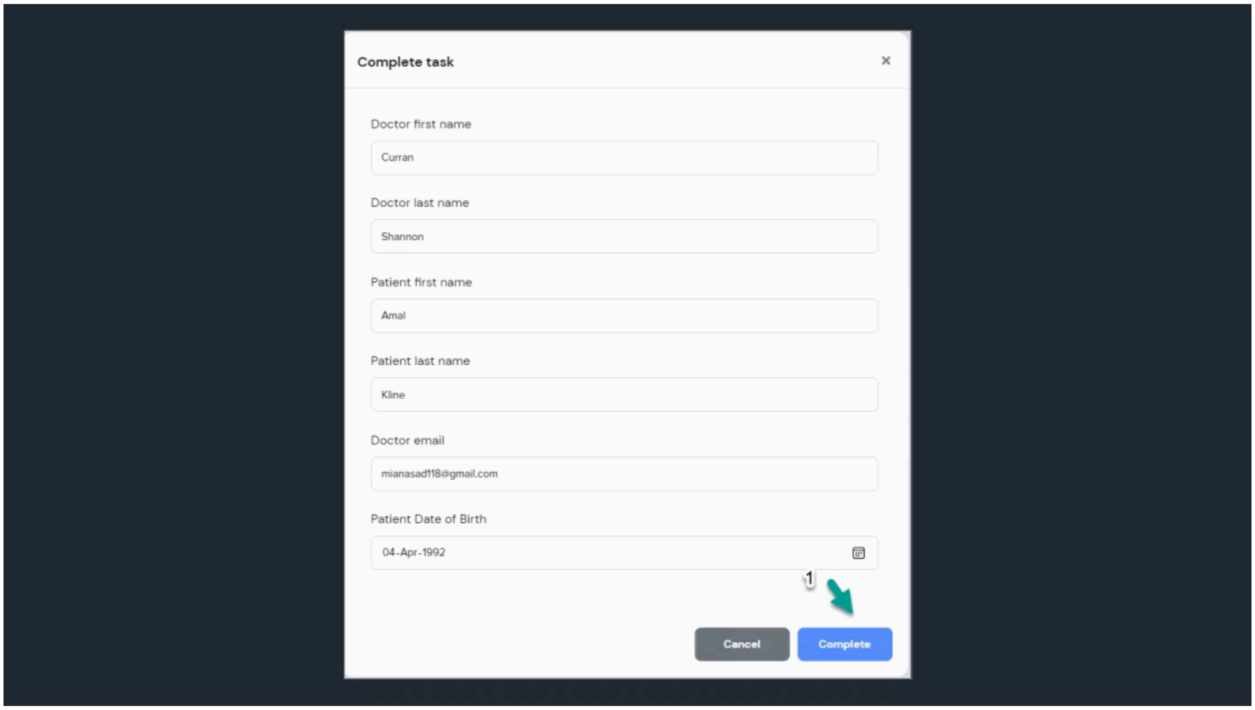
- A notification for this task will be generated to the above reviewer/staff member.
- When this staff member will click on "**Assigned Forms**"
- This staff member can see his all assigned form, and as well latest forms.
- The staff member will click on "**Complete Task**".
- A form will appear and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

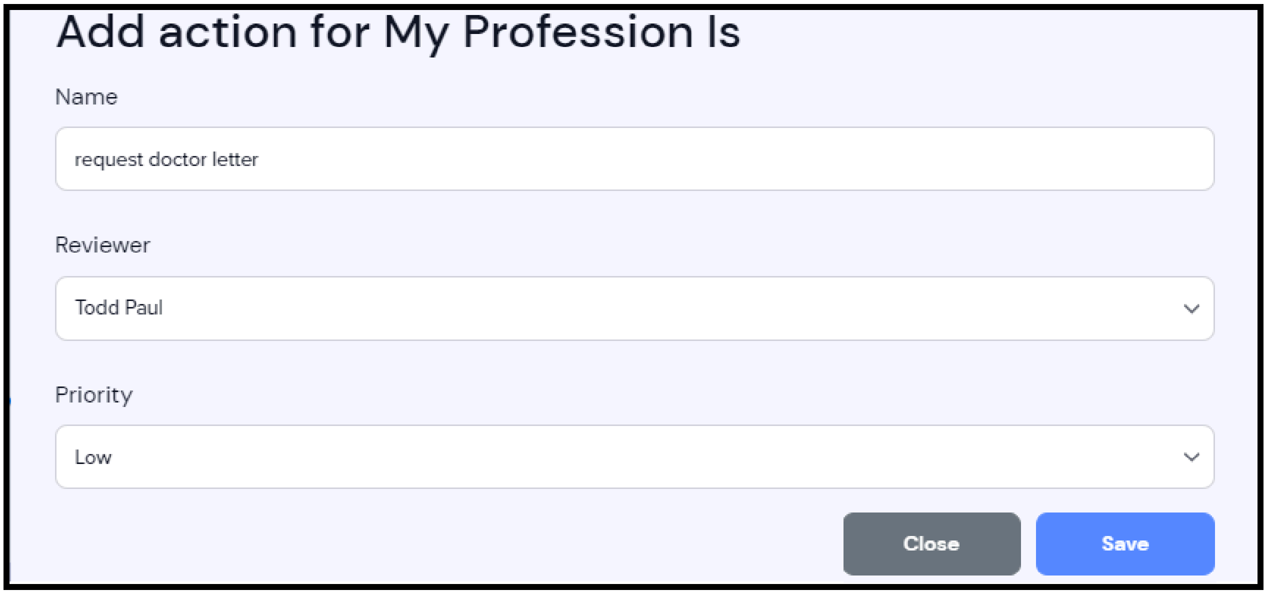


- Staff members will click on the Complete task button.
- A pop up will appear, a staff member enters the details and clicks on the "**complete**" button.
- After this status of this task will be**Awaiting** for this action, and email will be triggered to a given email address of Doctor.
- The recipient 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.

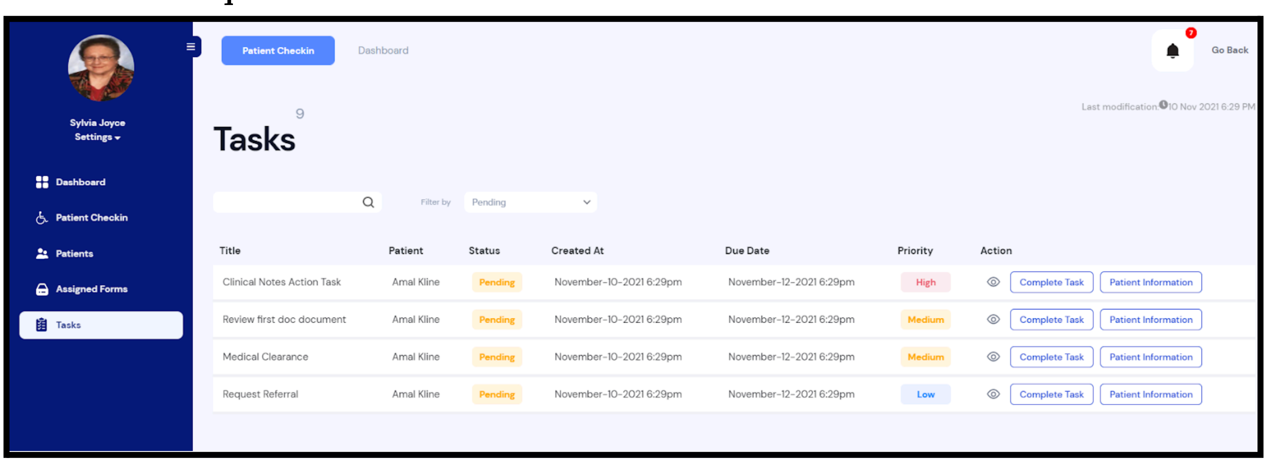


What will happen after doing the above activity?

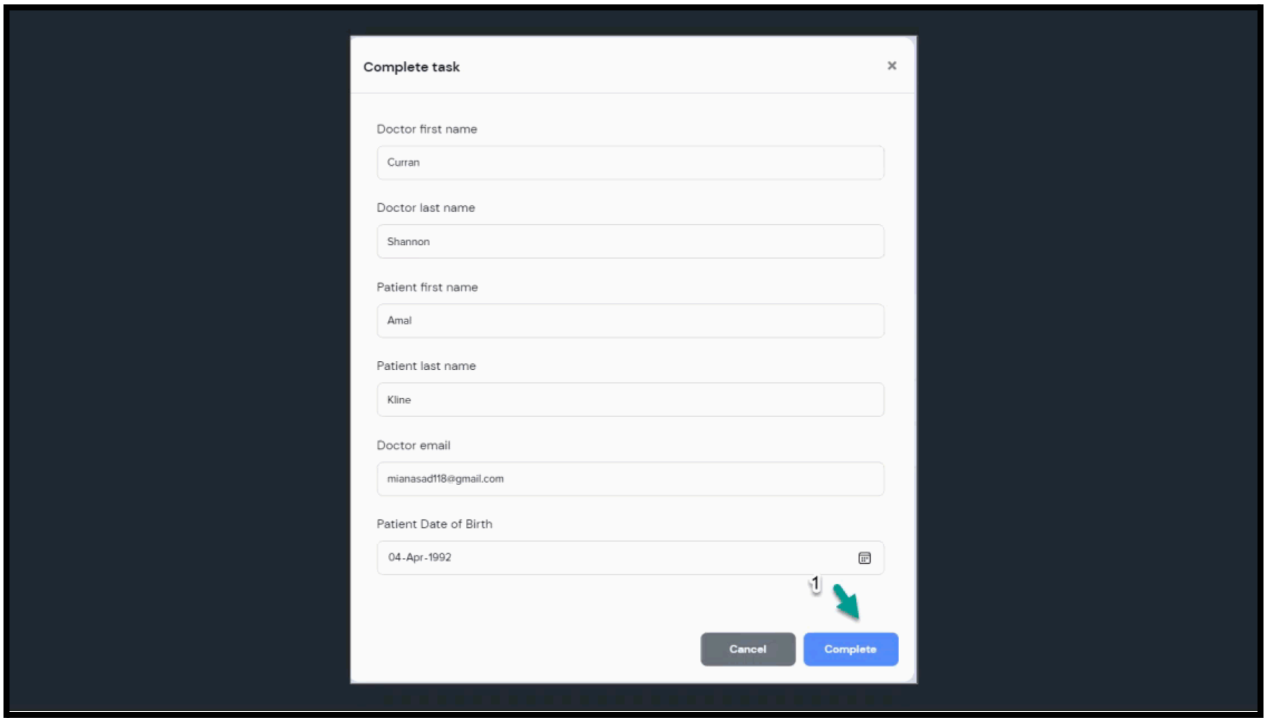
- A notification for this task will be generated to the above reviewer/staff member.
- When this staff member will click on "**Assigned Forms**"
- This staff member can see his all assigned form, and as well latest forms.
- The staff member will click on "**Complete Task**".
- A form will appear and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



- 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.

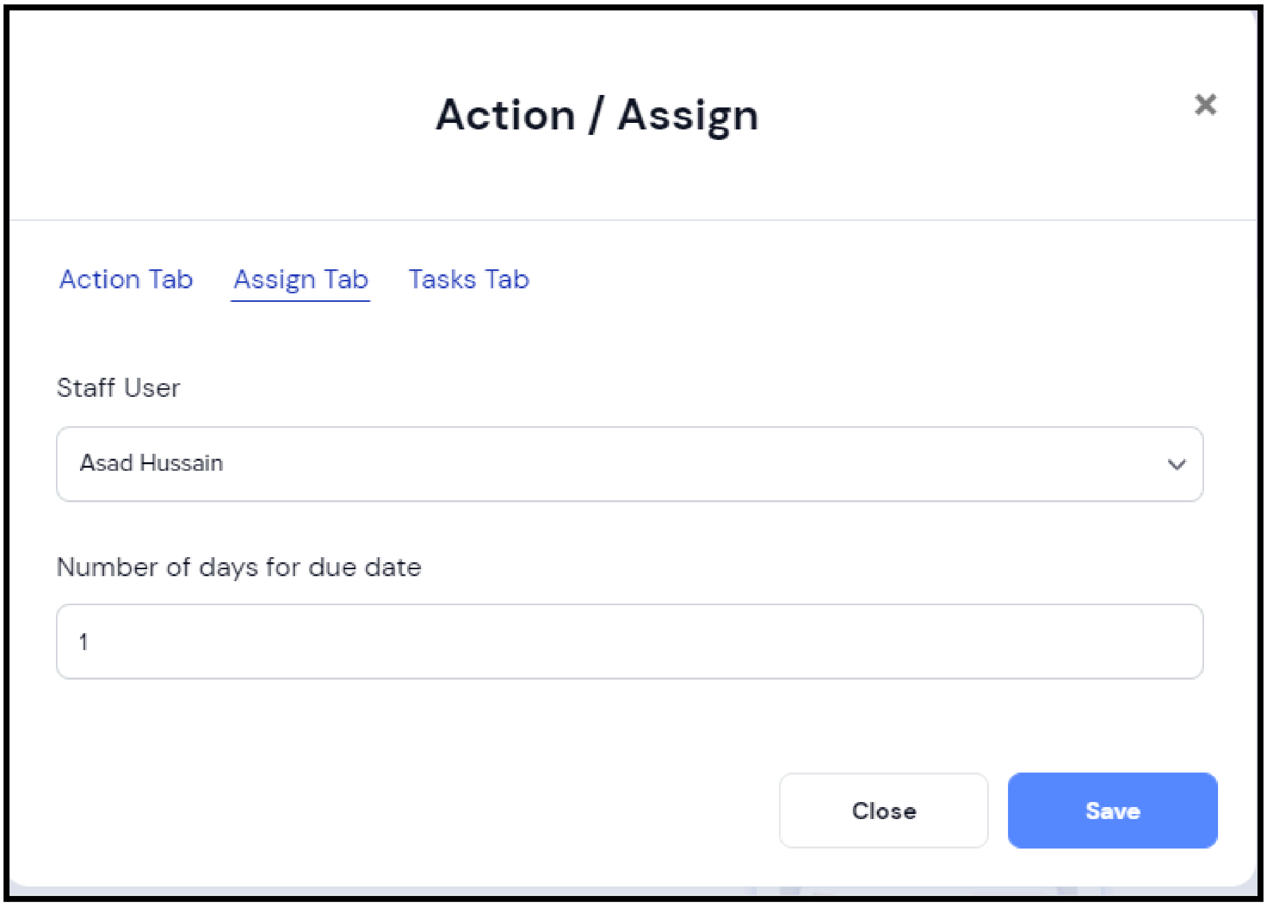
- The staff user will click on "**Patient**"
- Find that patient the workflow was assigned.
- Click on **view assigned workflow** button
- Click on **Actions,** it will show you the all letters
- Click on the letter which You want to see & download.
- A new window will open in which filled data against 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.



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

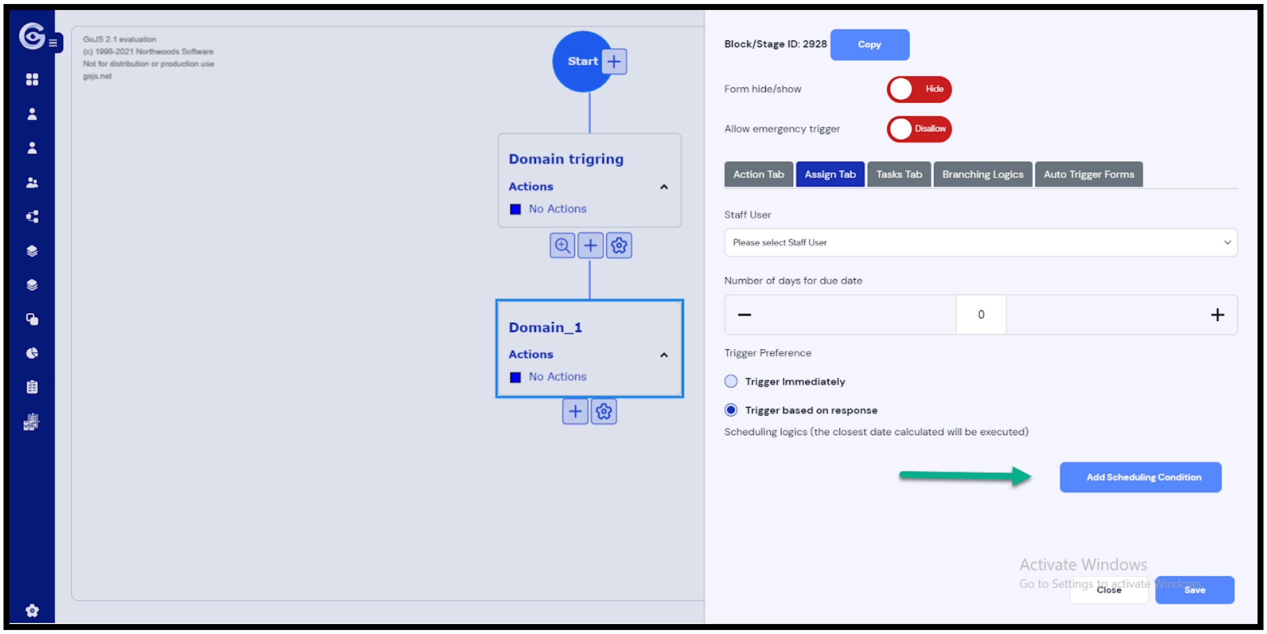
Let suppose we have two forms in a workflow, we want that when our first form completed on specific date then second form should be triggered, that is assigned
To staff members.

How can we do this ?

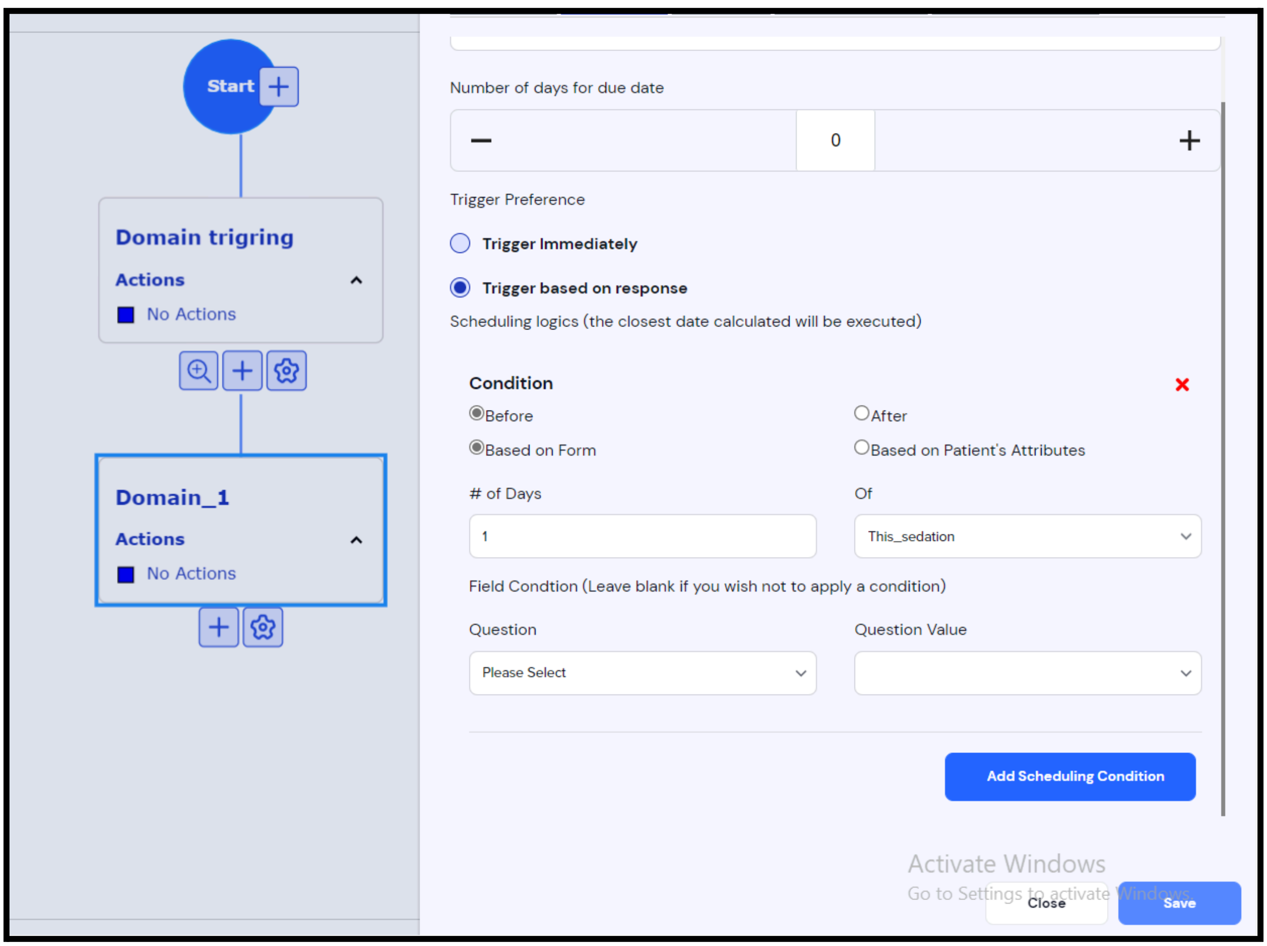
- Create a first form that must contain a date field.
- Create another form.
- Go to workflows.
- Drag and drop a form that has a date field.
- Drag and drop second below the first form.
- Click on the setting icon on the second form, then click on the assign tab.
- Select the check box option "Trigger 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.



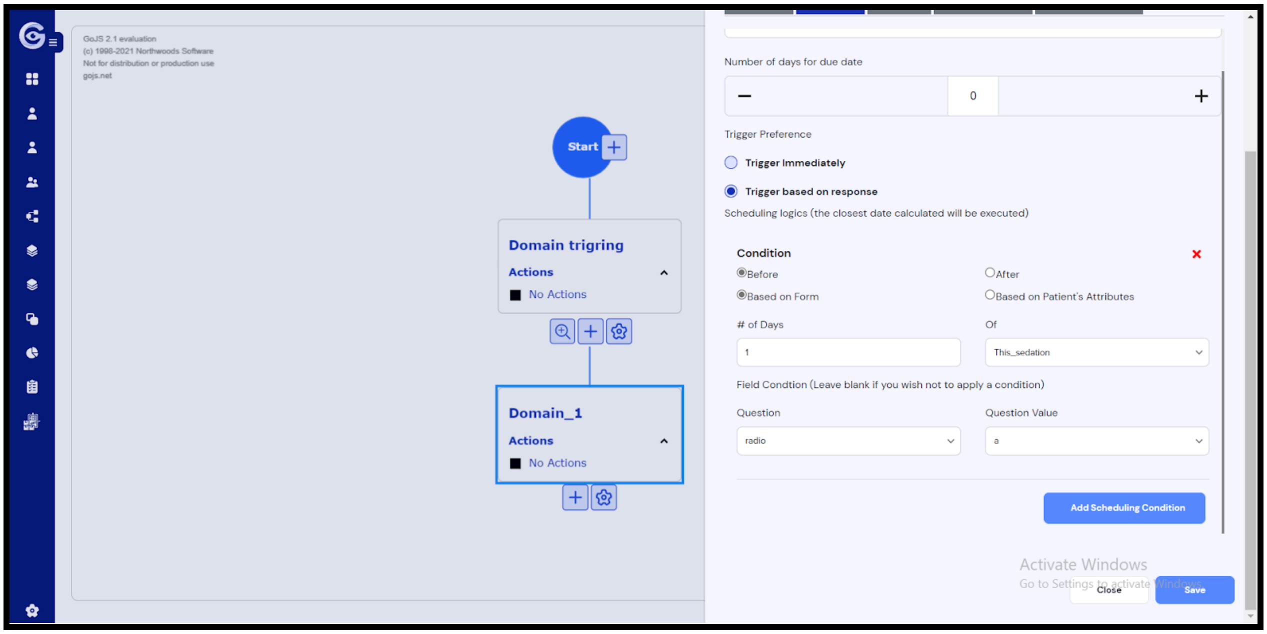
In "Conditions" there are four radio option , you can select either one of the option in a row

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

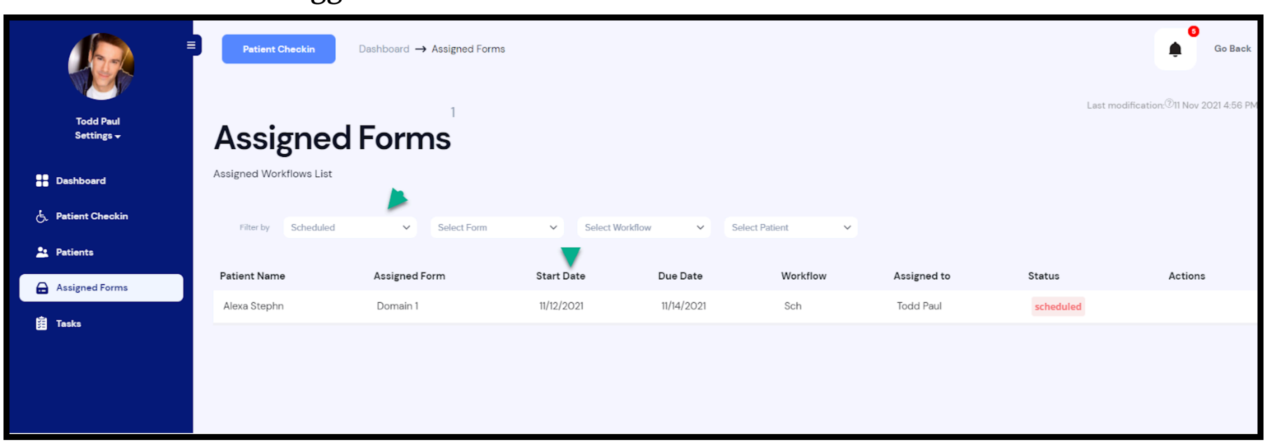
Lets see these combination one by one for scheduling

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.



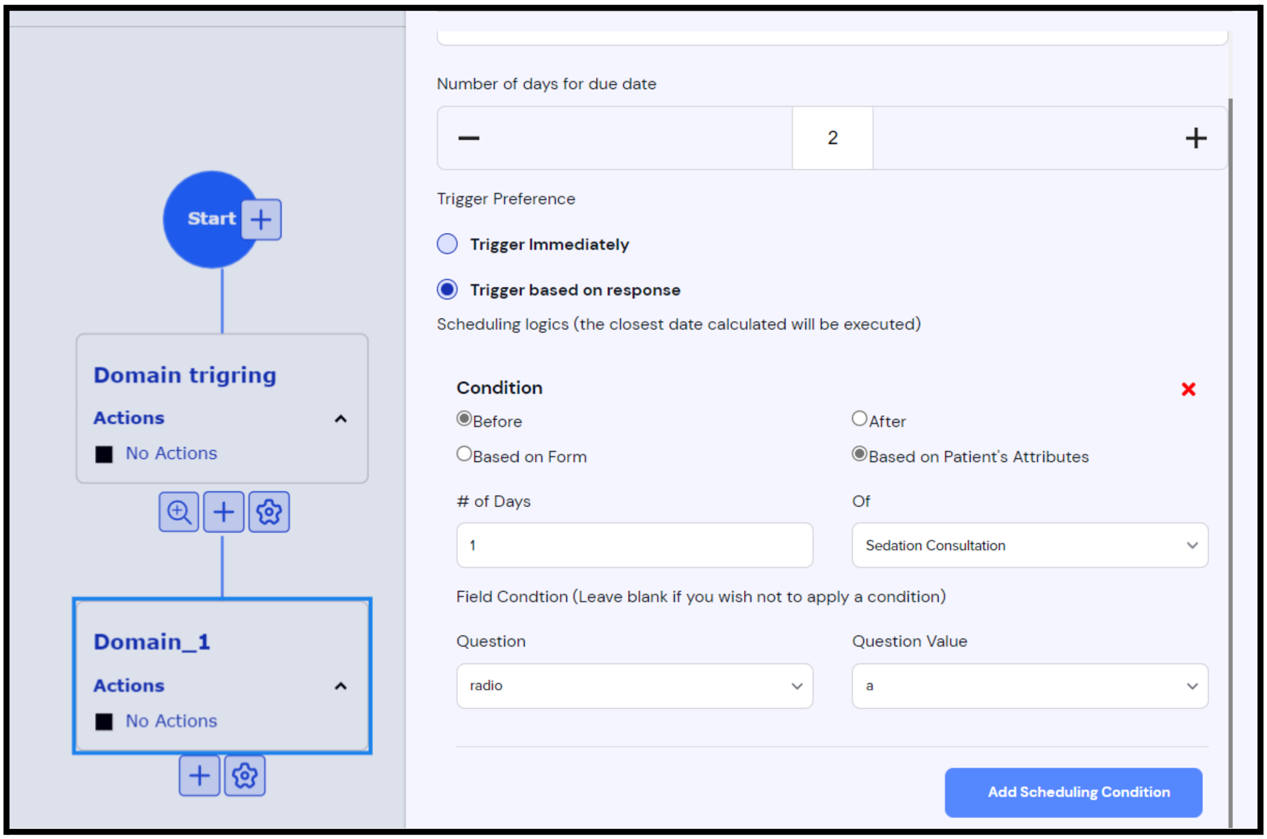
When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.



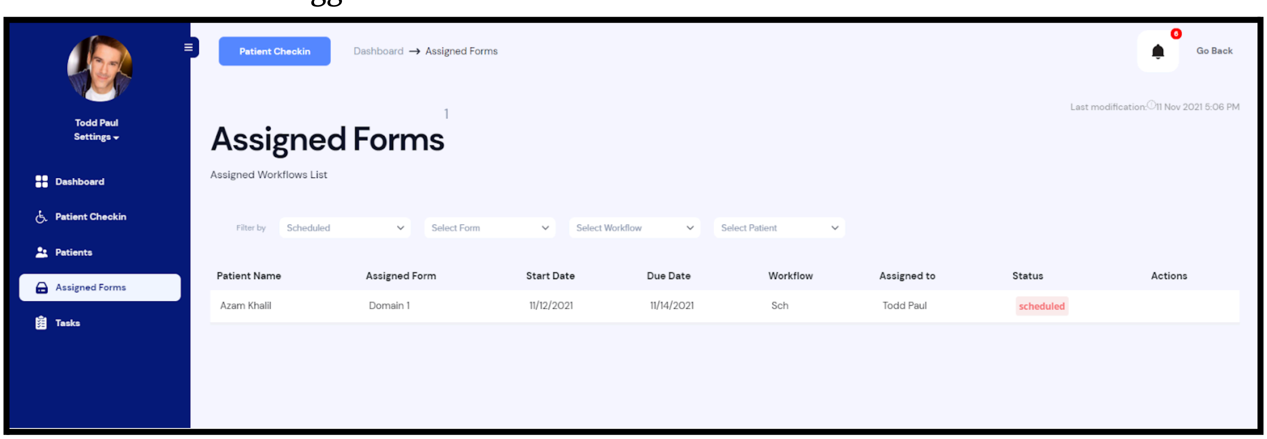
Before & Based on Patients attributes

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.

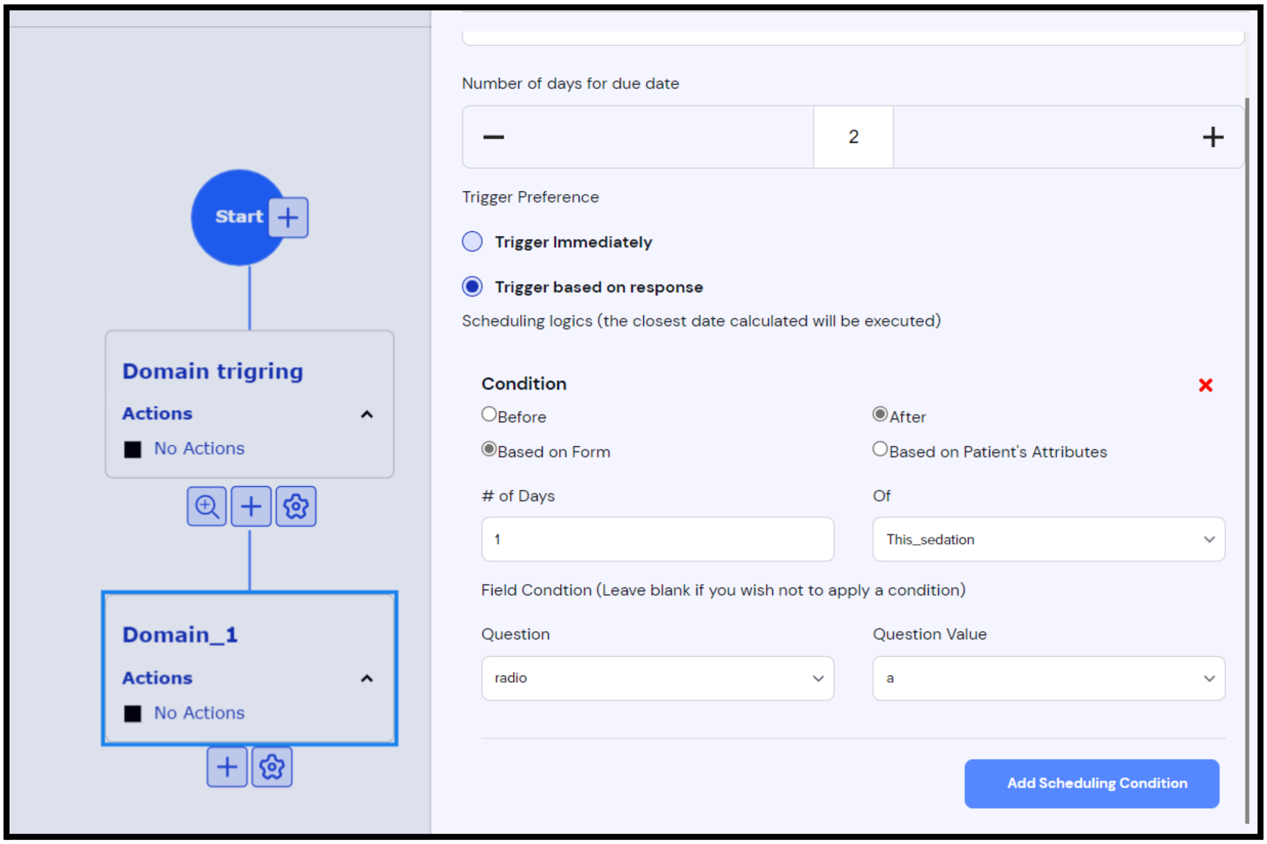


When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.

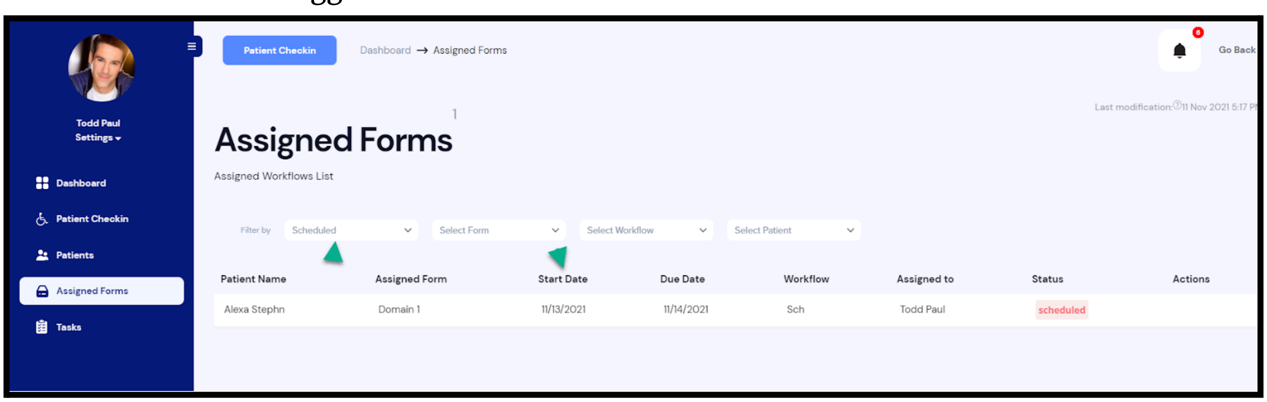


After & based on From

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.

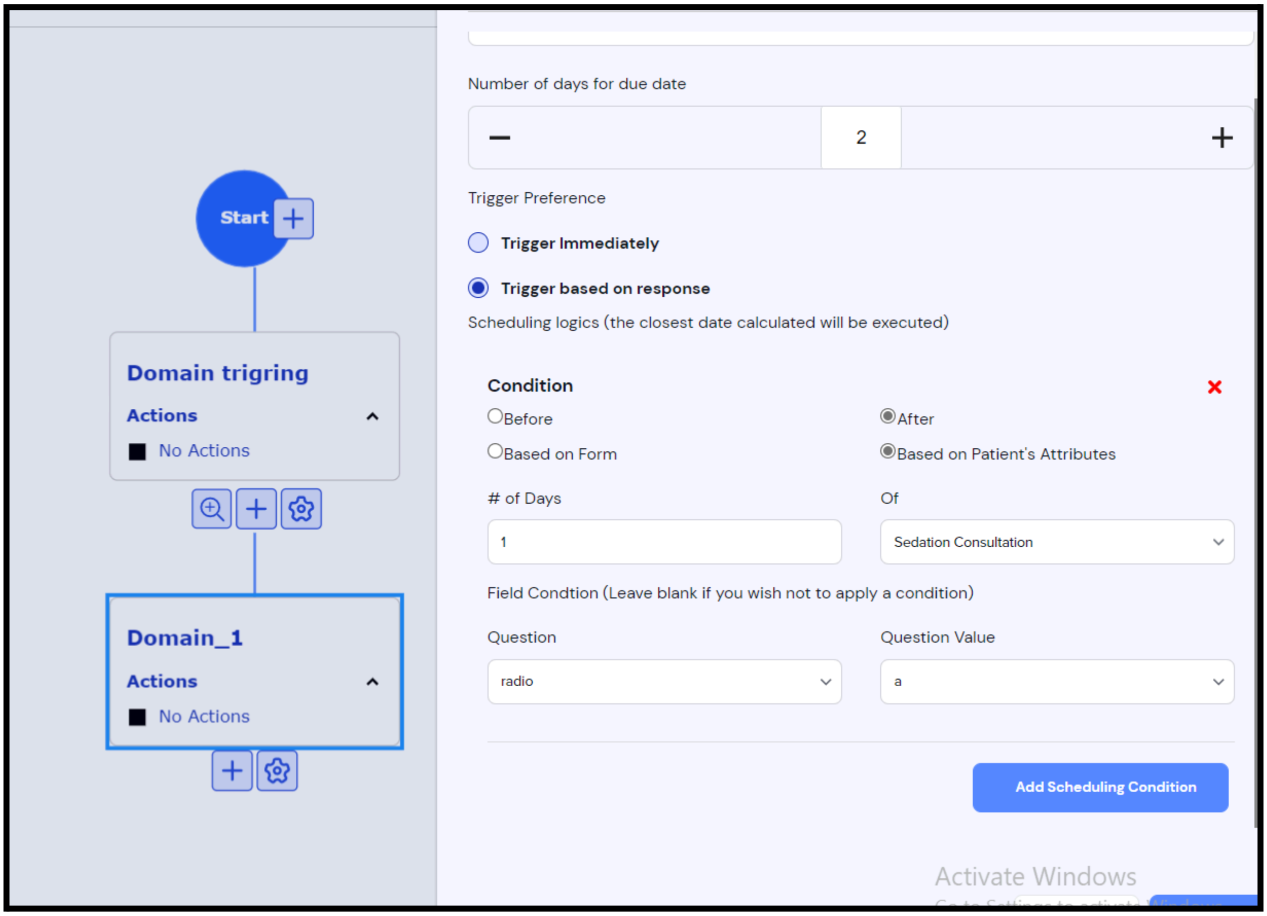


When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.

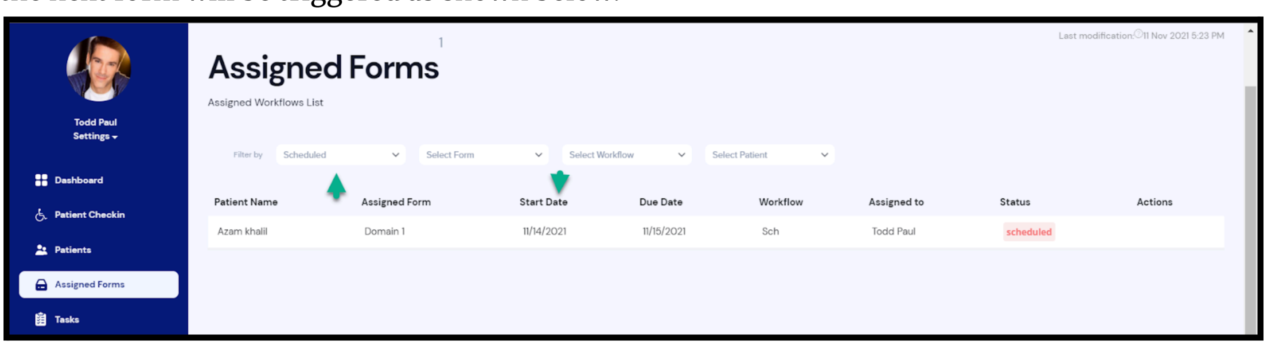


After & Based on Patient Attributes

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.

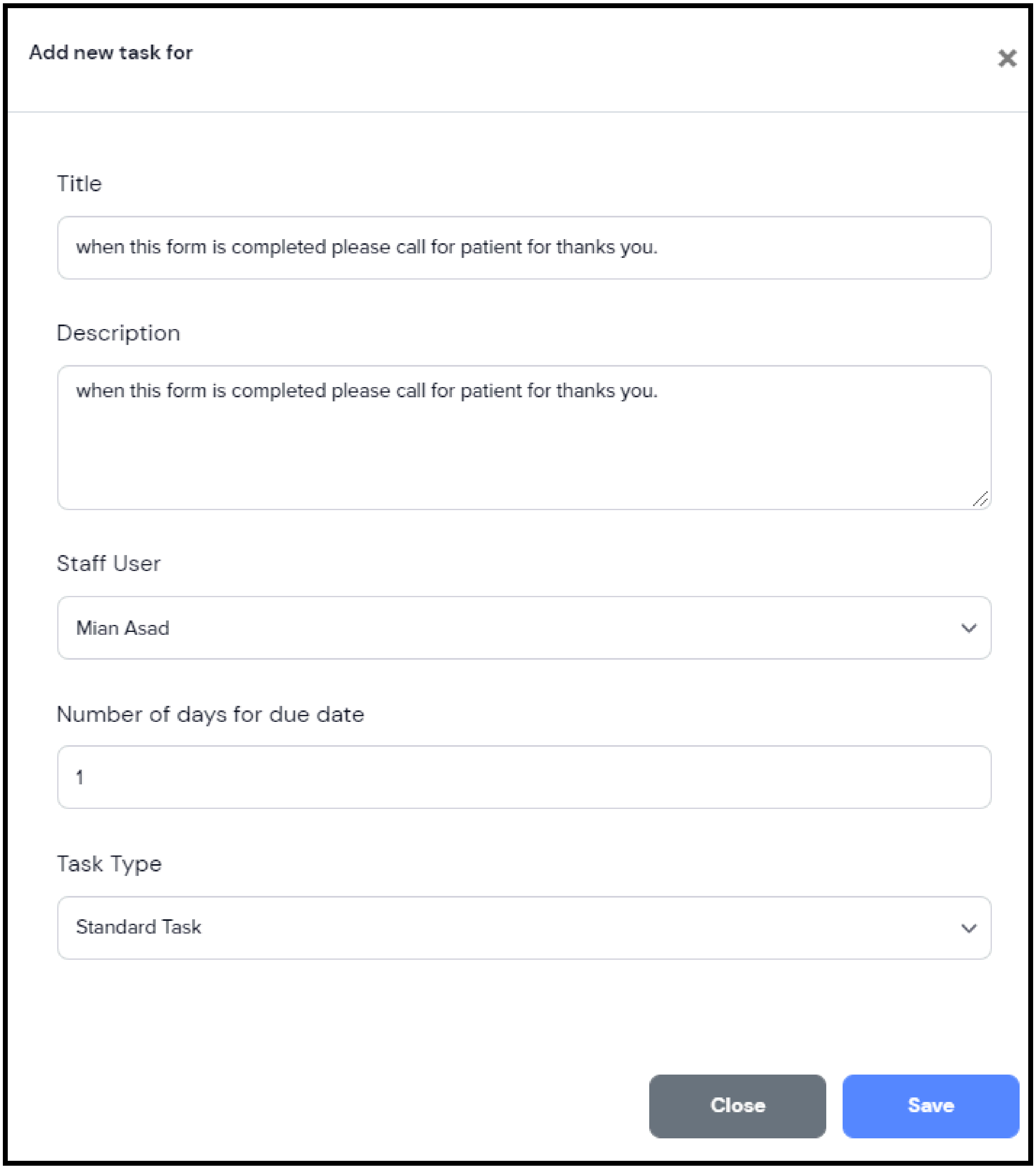


When staff members fill the first form and after submit , on the basis of the above condition the next form will be triggered as shown below.



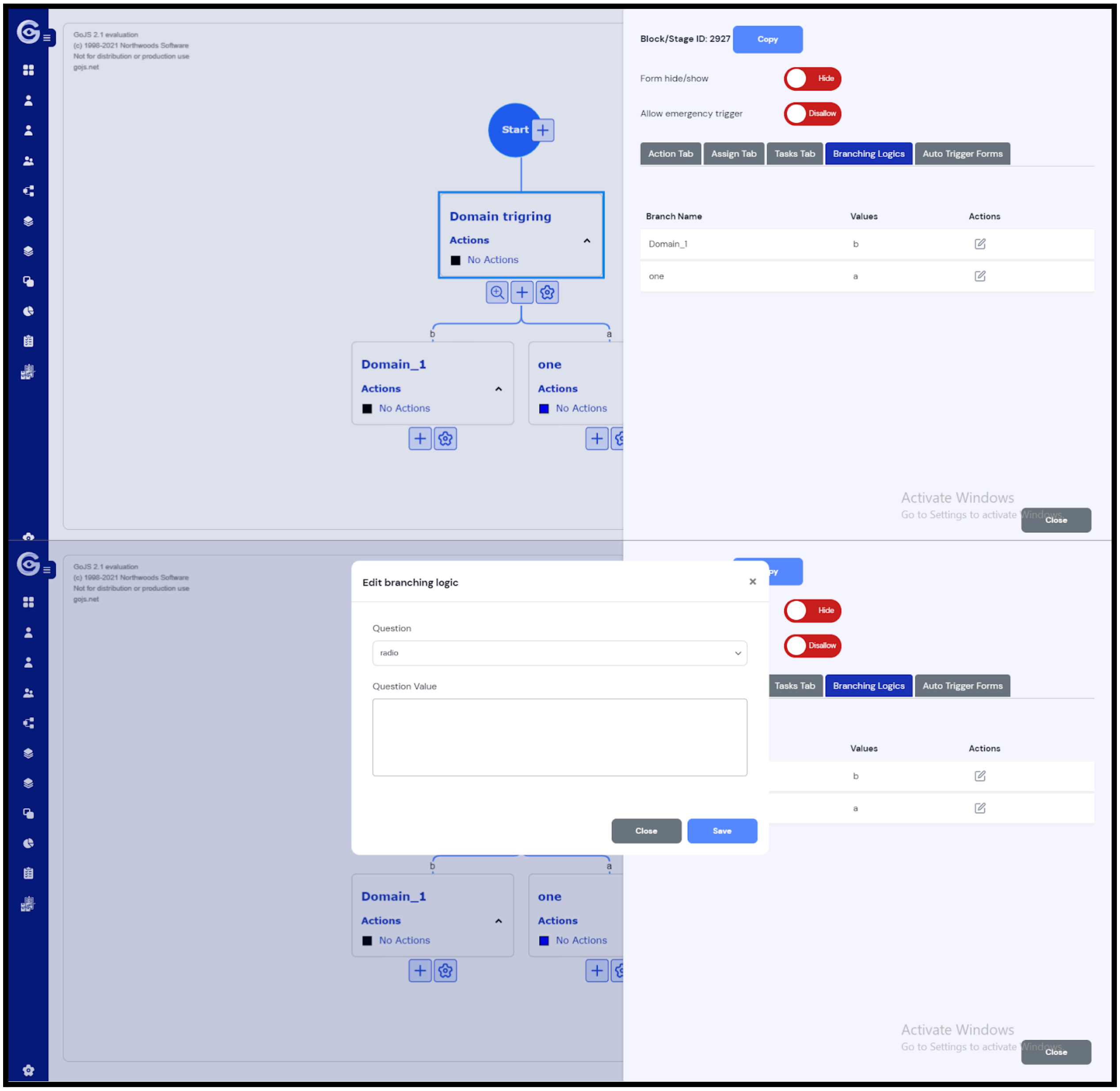
Tasks tab

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.



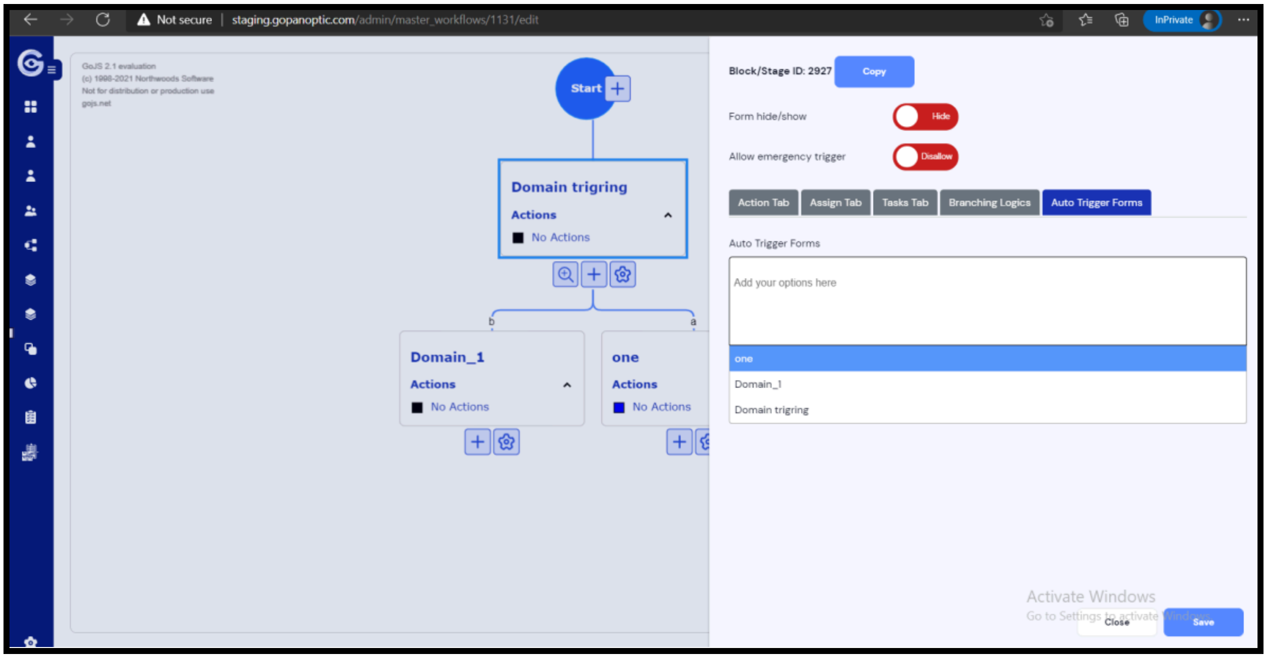
Branching Logics

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.



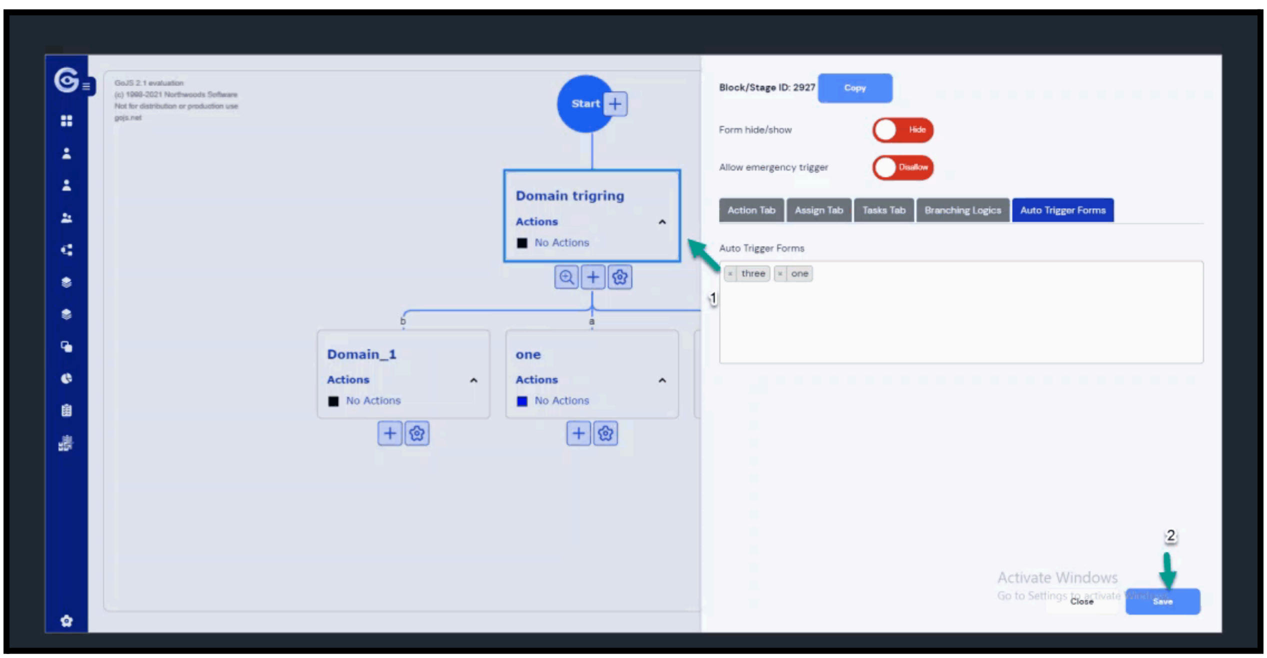
Auto Trigger Forms

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

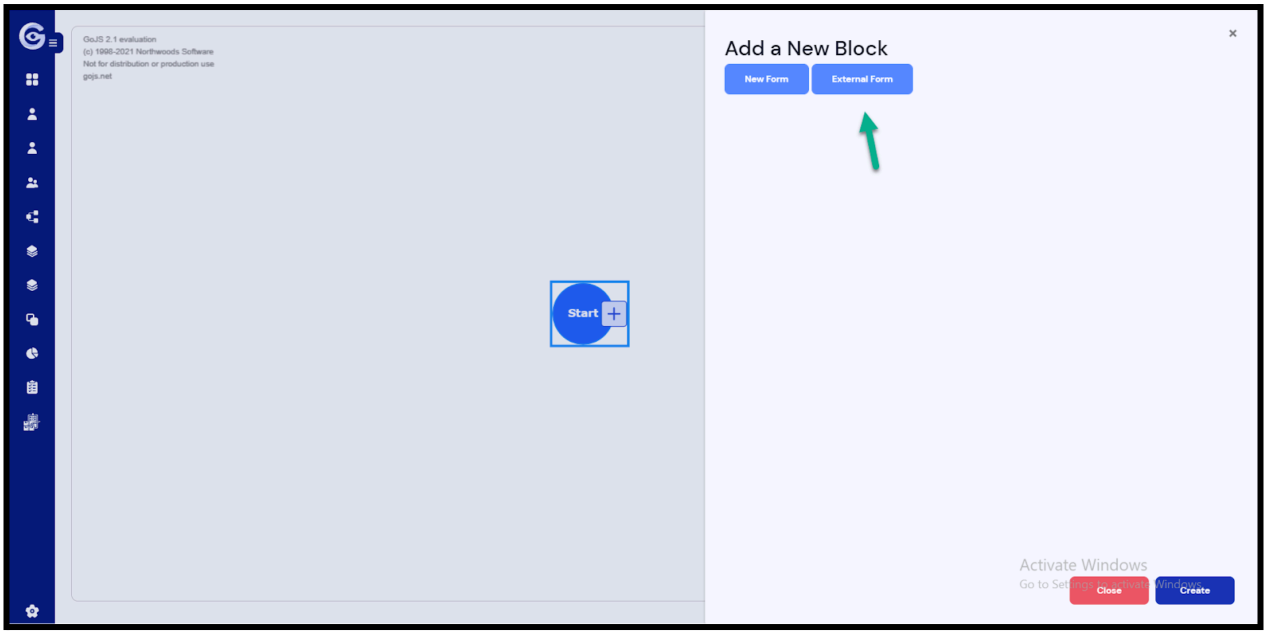


External Forms

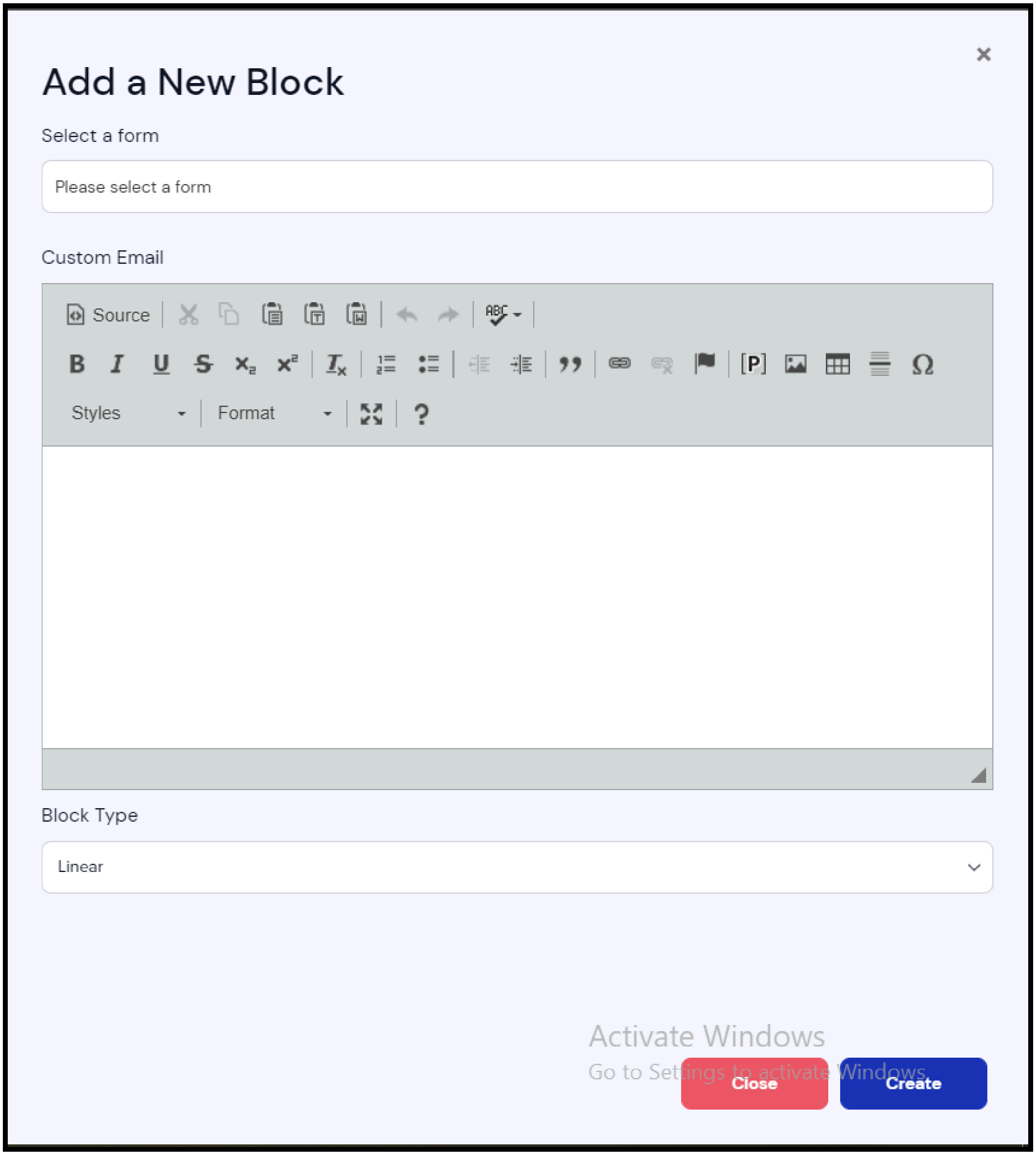
These are the same form as new forms, the only difference is that we can assign these forms to an external user/actor, and external users will fill this form.

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

Source

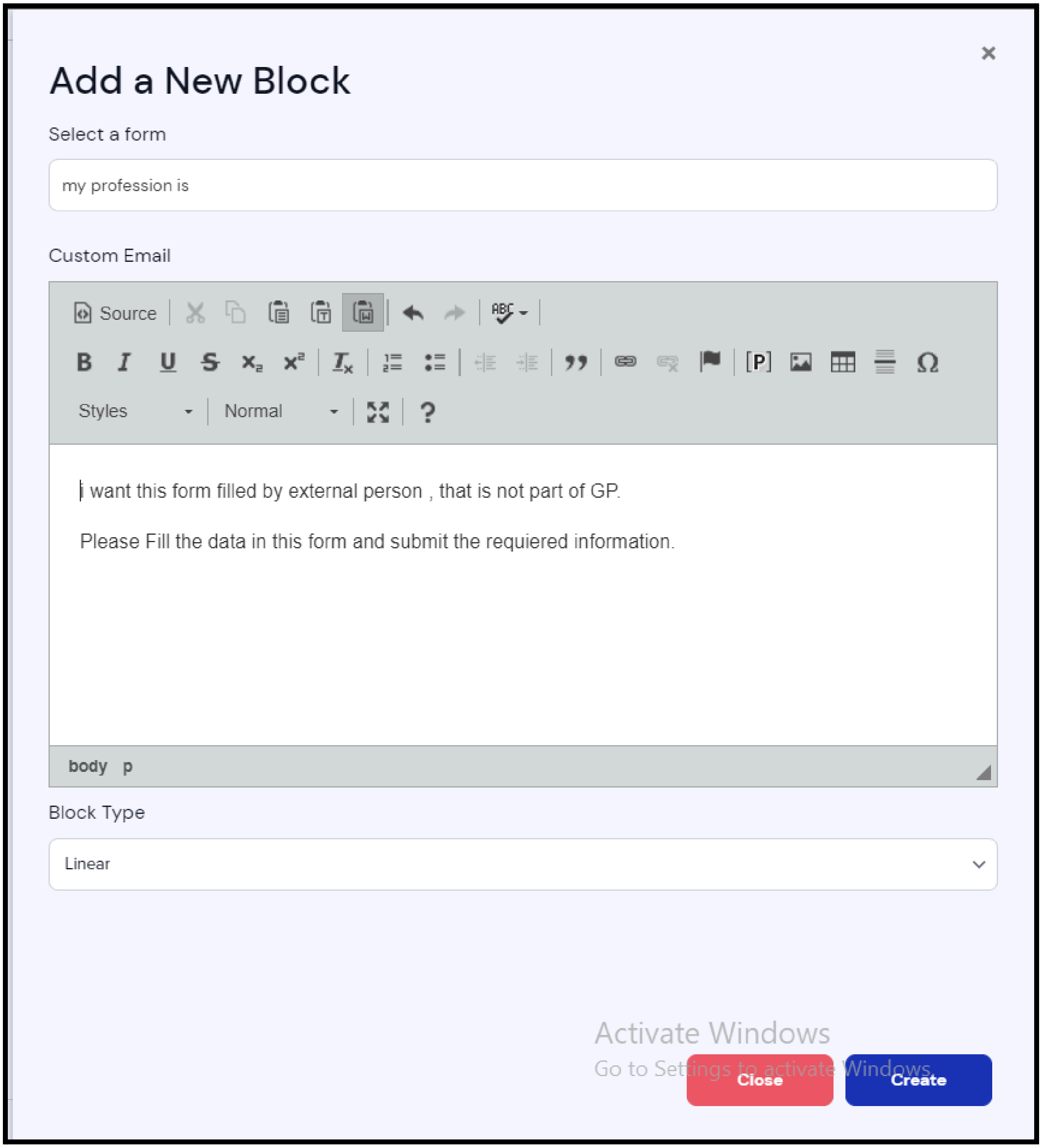
Styles Format

Block Type

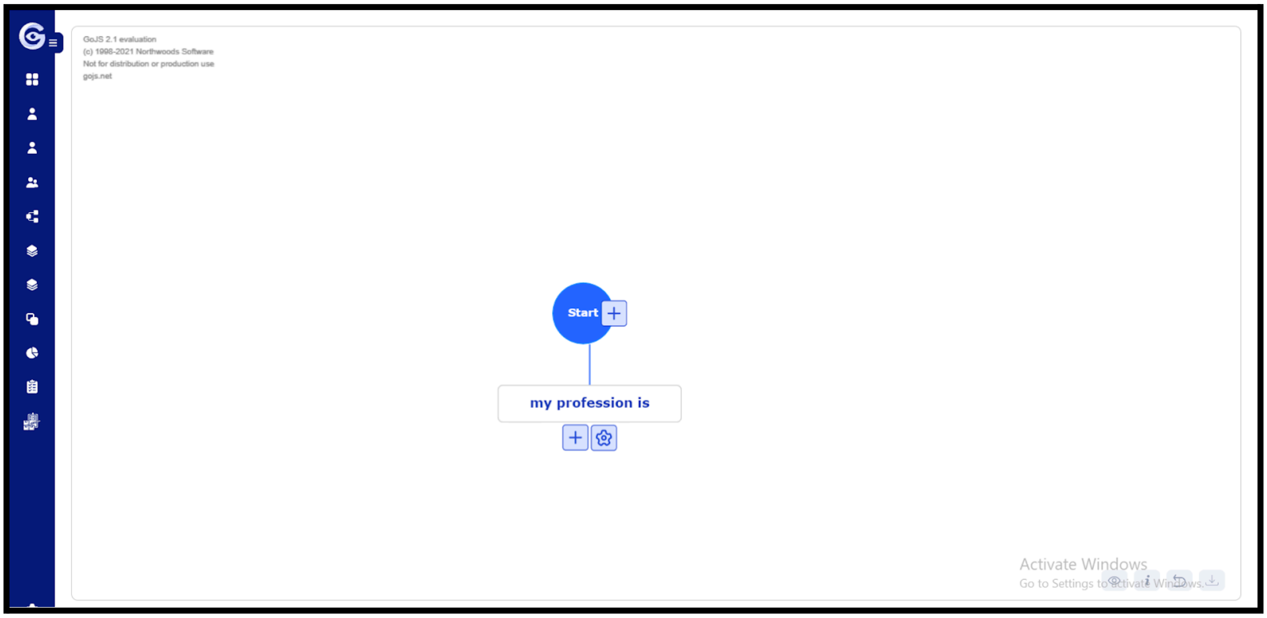
Linear

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.

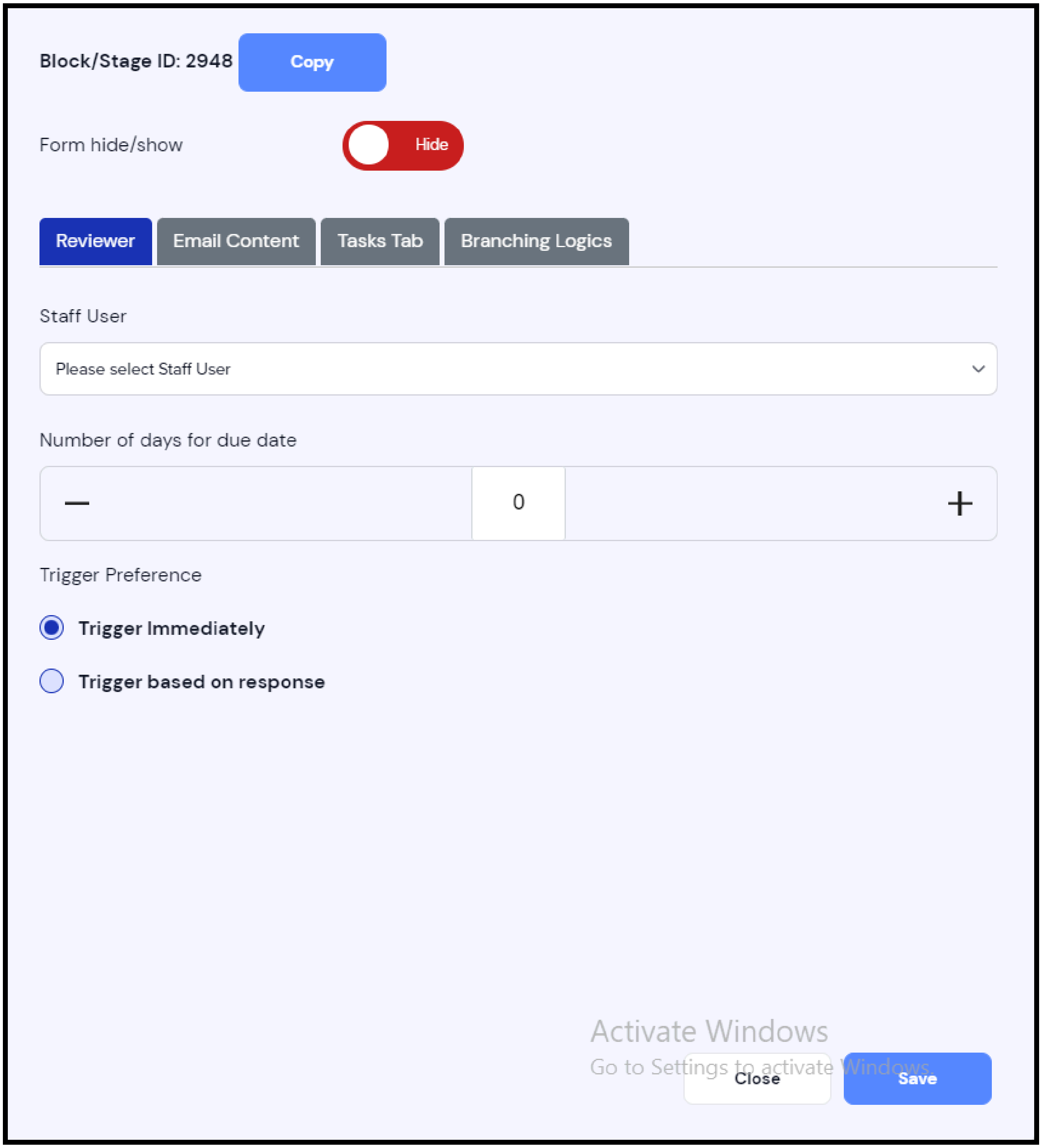


After adding the info when you will click on ‘create” button, this form will be shown on workflow add page



Setting icon with external form

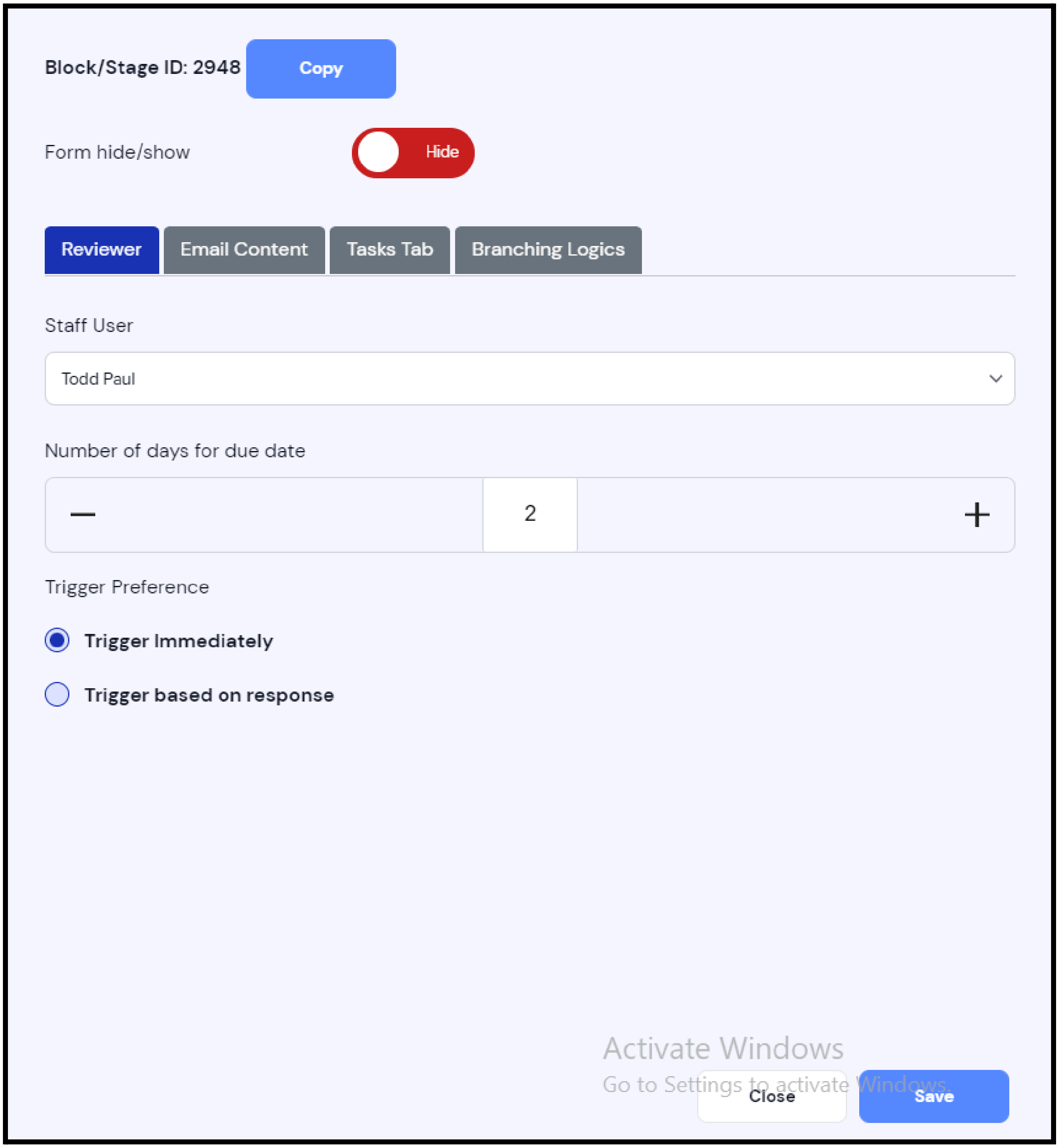
When you click the setting icon showing below the external form it will open a side modal having some tabs and further options.



Block/Stage Id: 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.

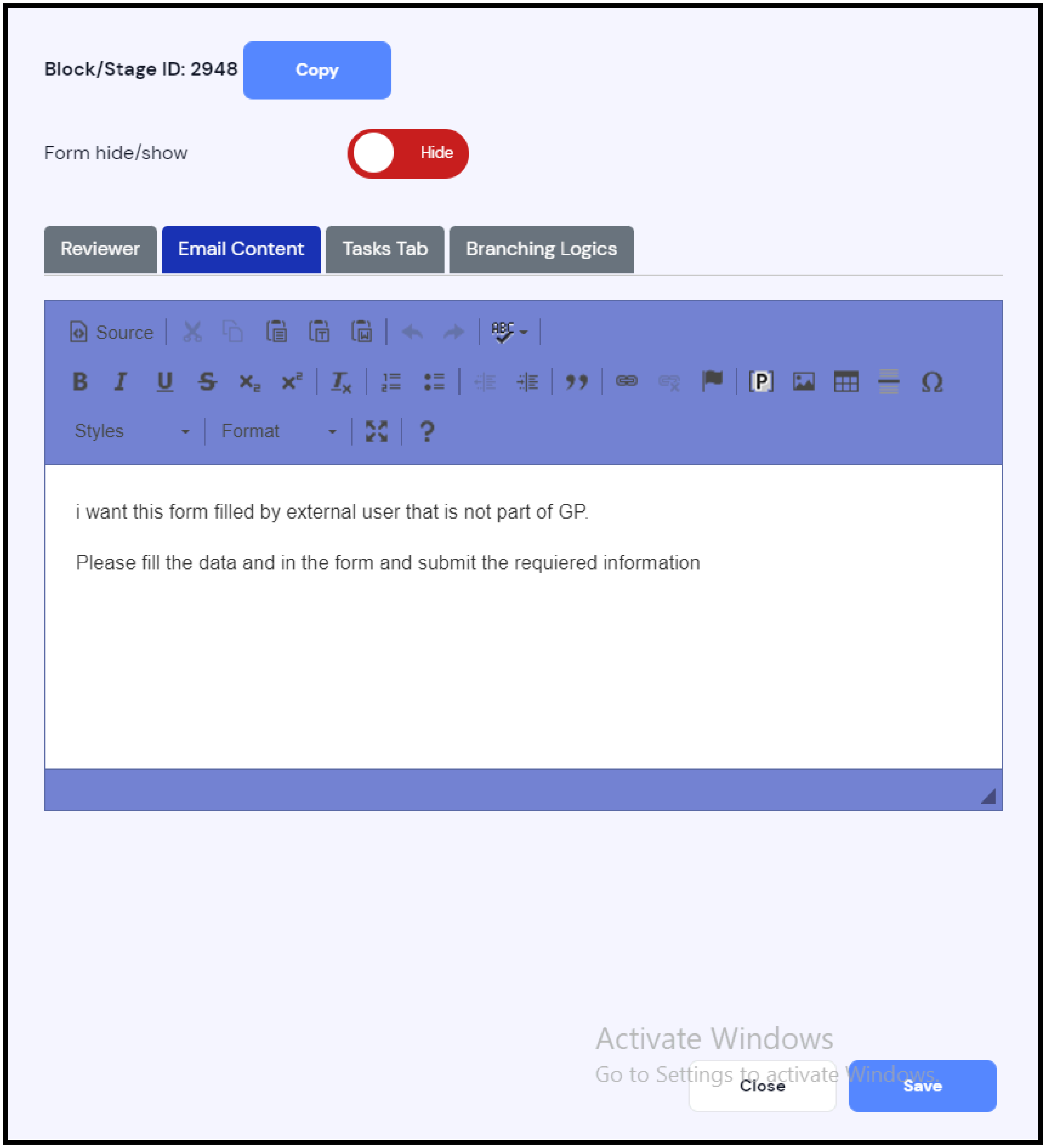
Reviewer

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.



Email Content

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

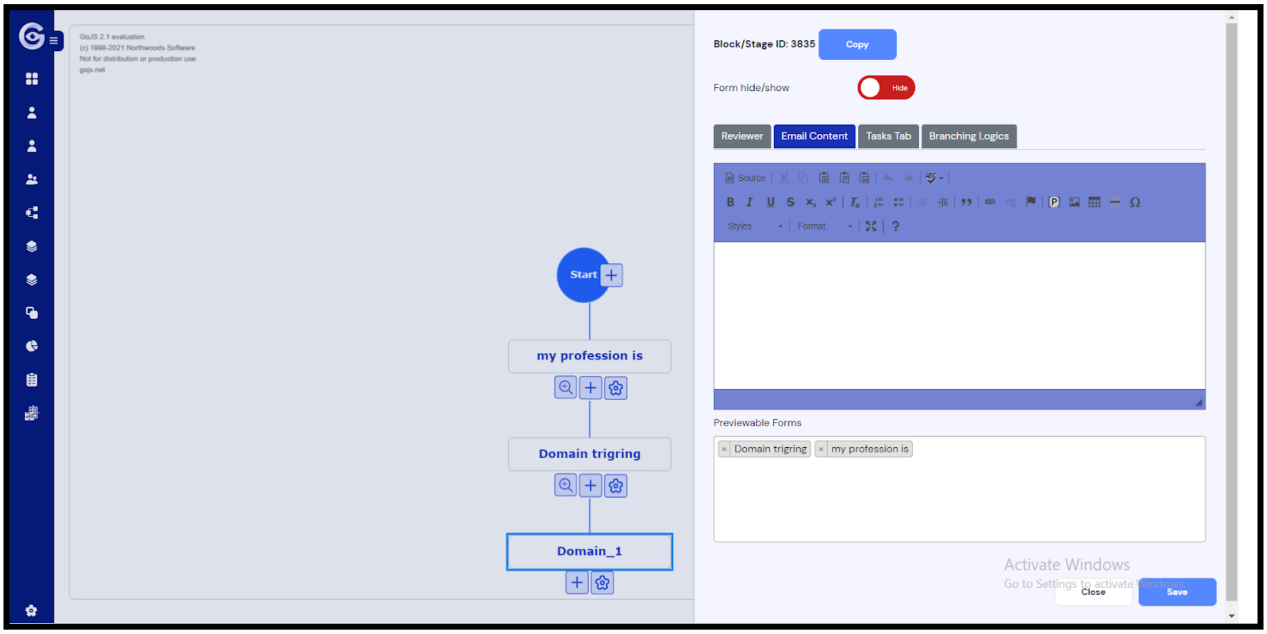


Previewable Forms

We have added a new functionlity 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.

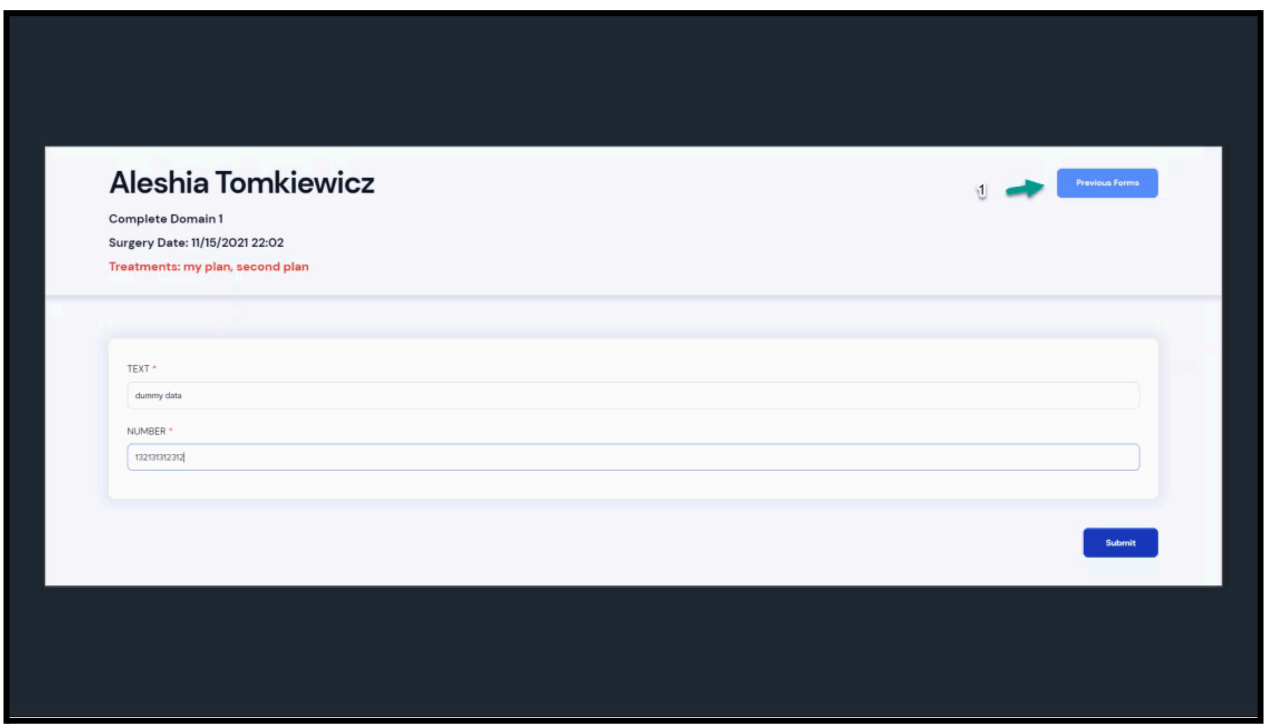
This functionality will work when the current form has some parent forms.

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.



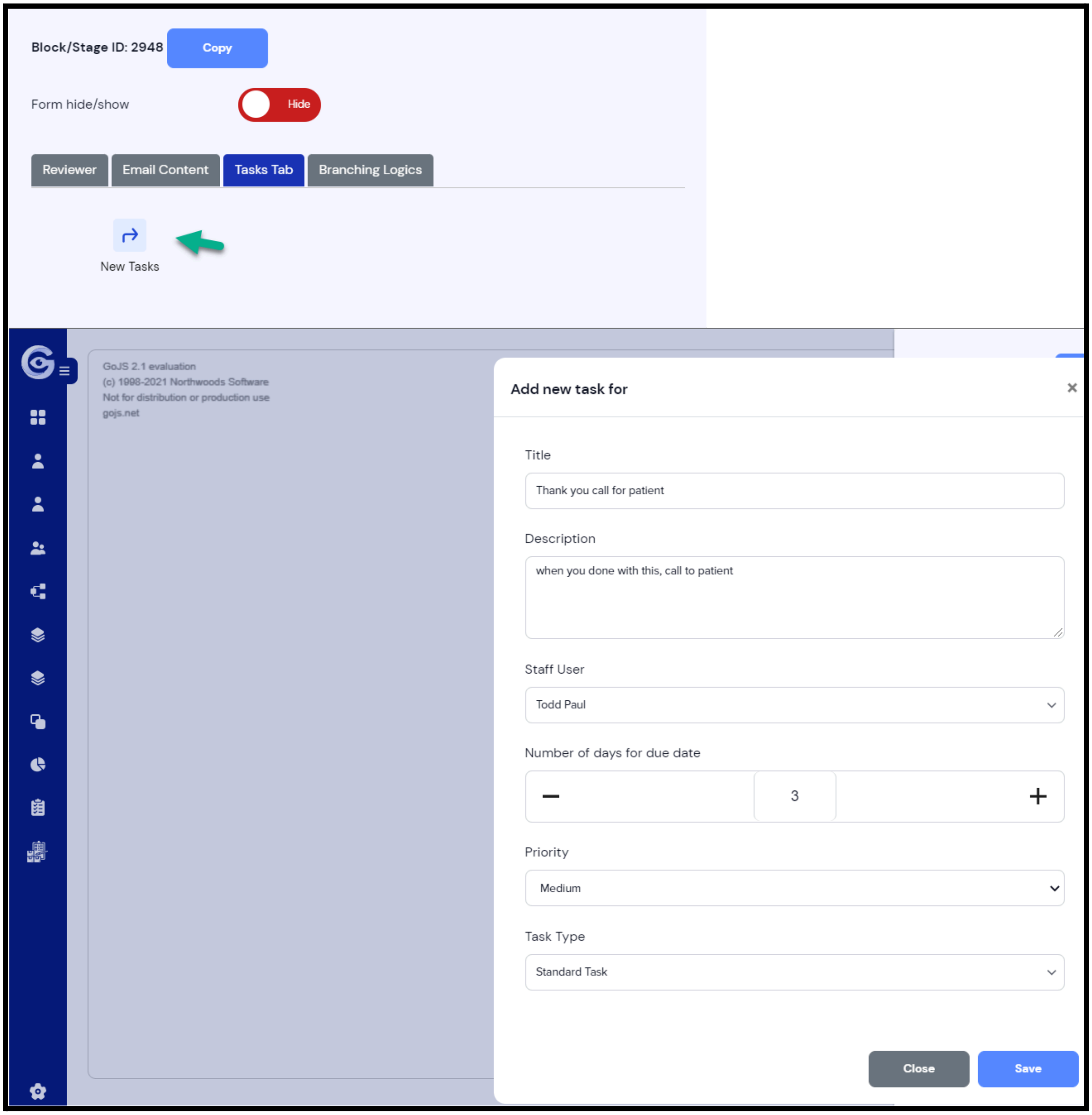
After selecting the form in the “previewable form” section,the user will click on the save button.

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



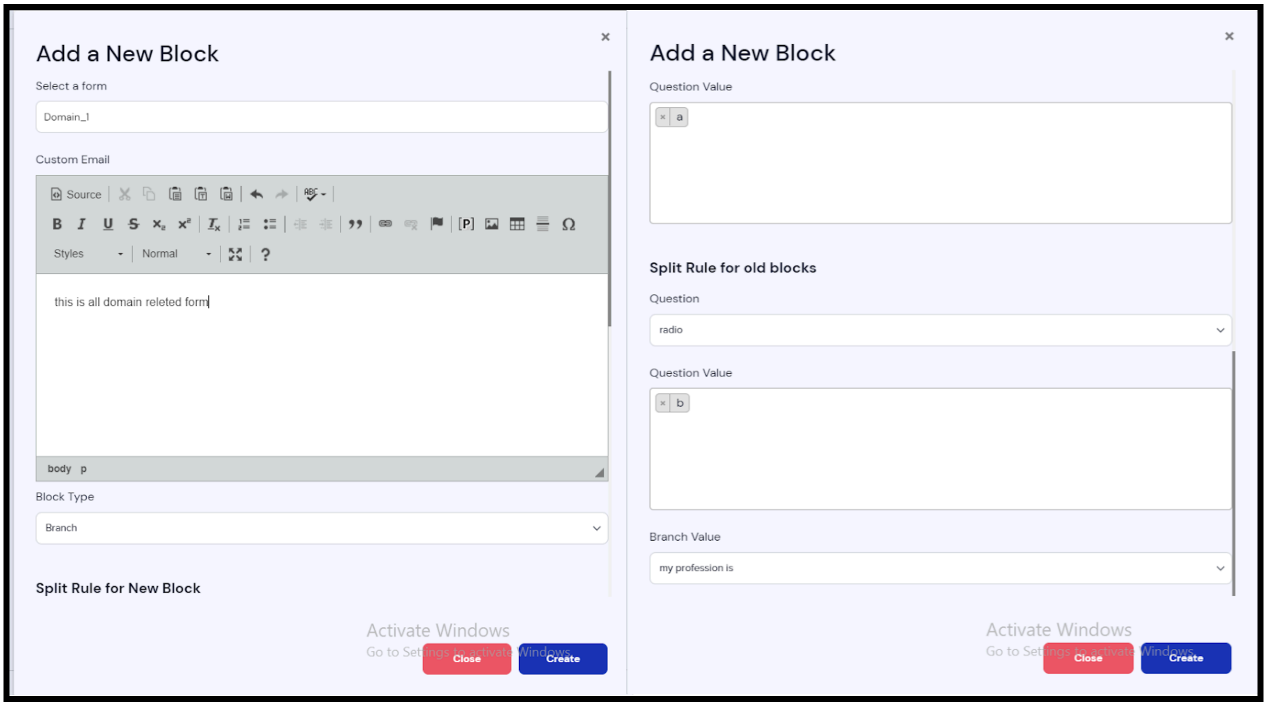
Task tab

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

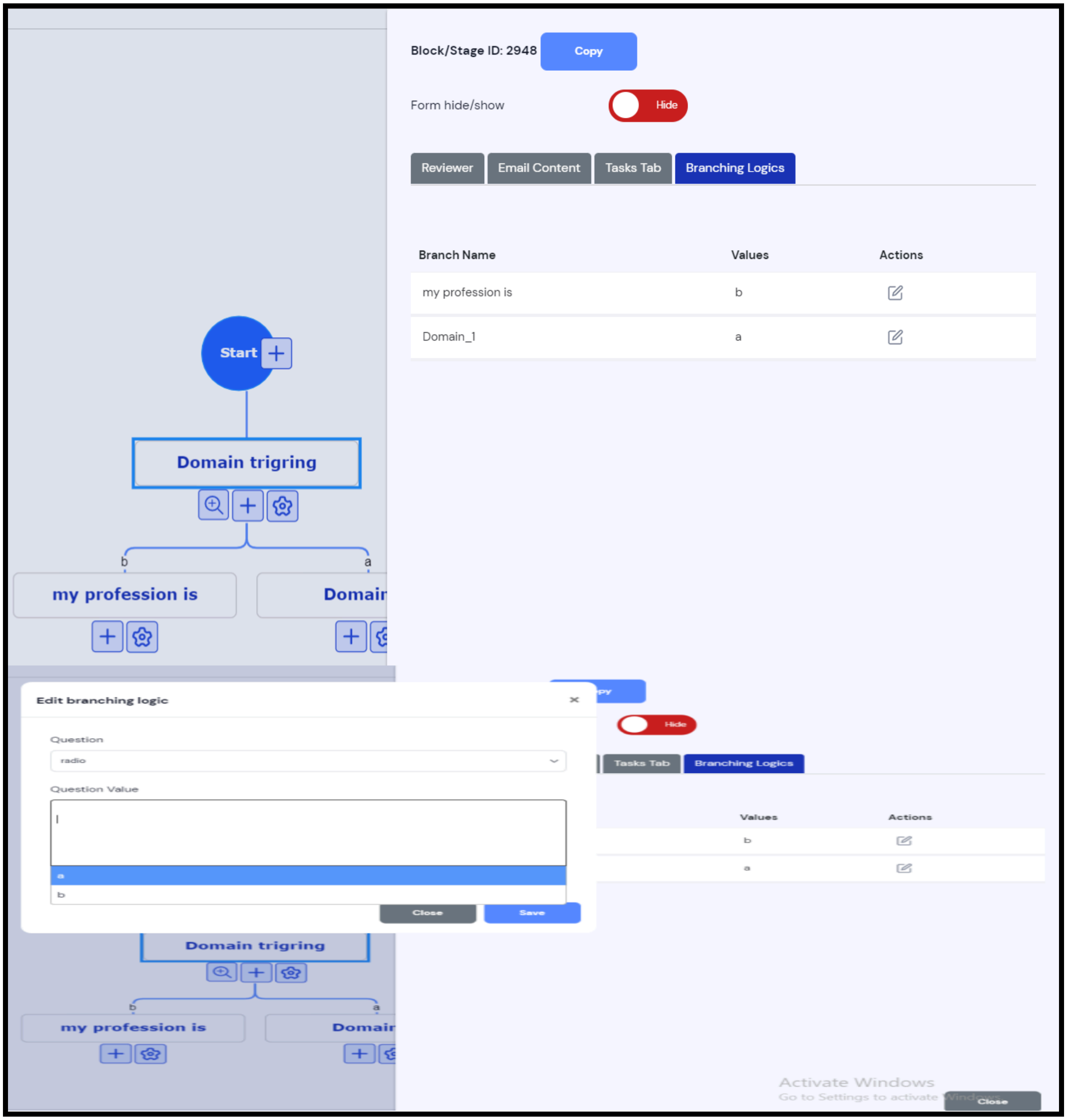


Branching Logics

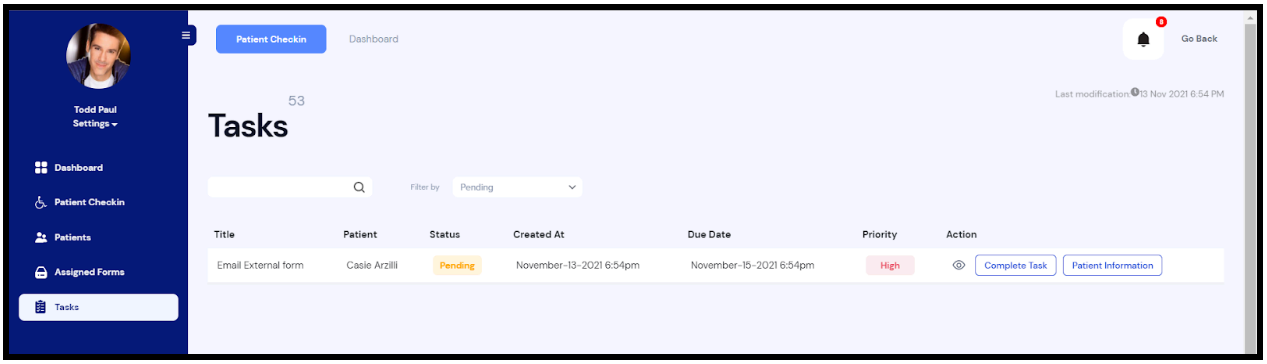
This section shows you the branching form , and values upon which branching is created. We can create branching in the external form as done earlier for simple forms.



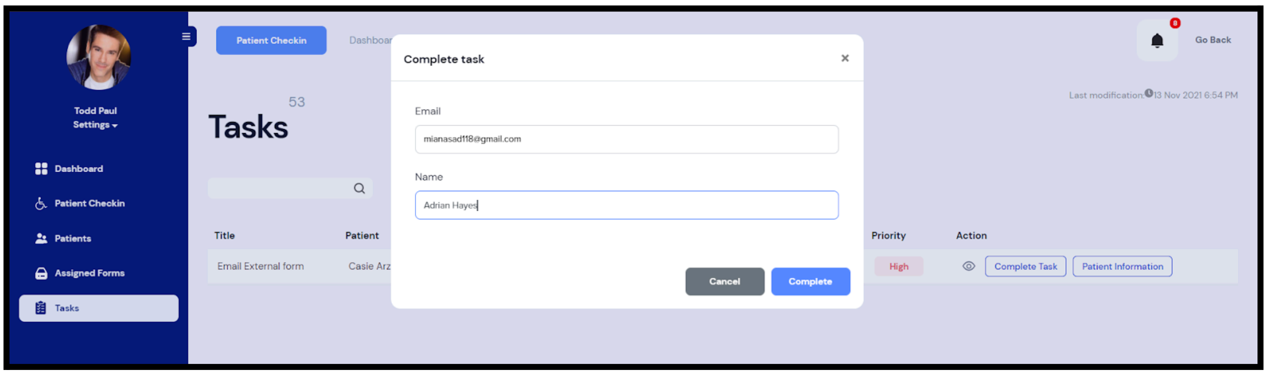
As you can see in the above image we can also create branching for external forms. And we can edit the values as well in this section like we done earlier for New forms



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

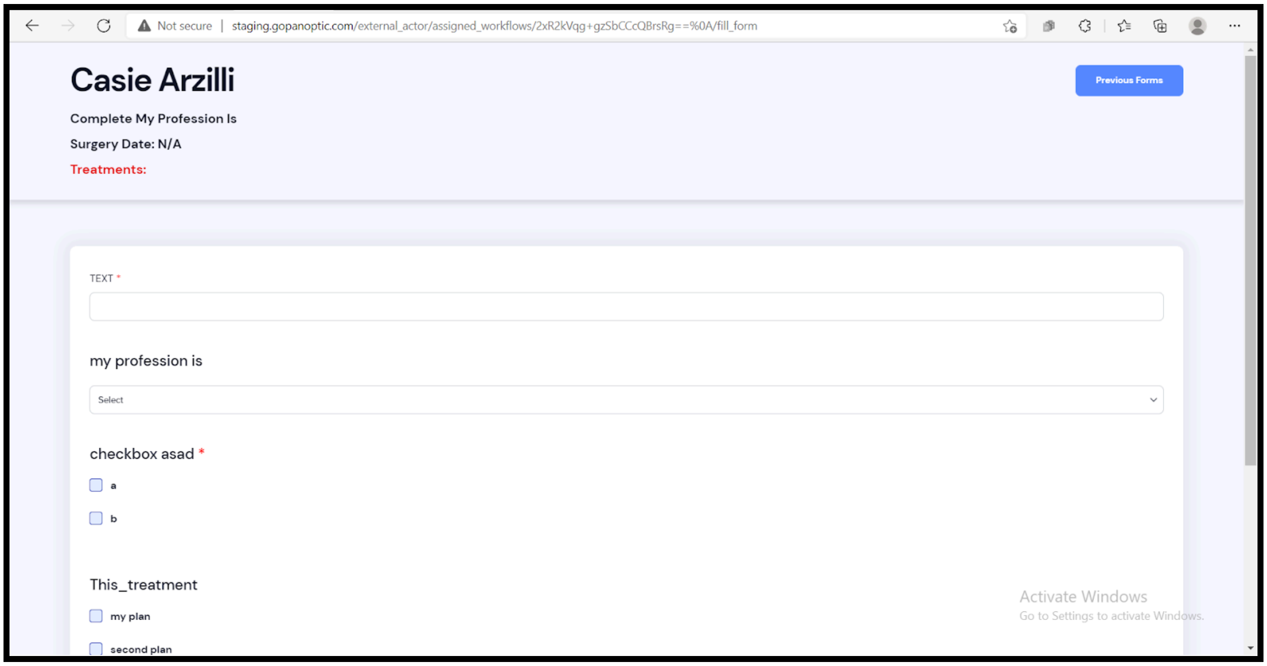


When a staff member clicks on a complete task , it will show a pop up modal where a staff member enters the name and email of an external user , who will fill this form.

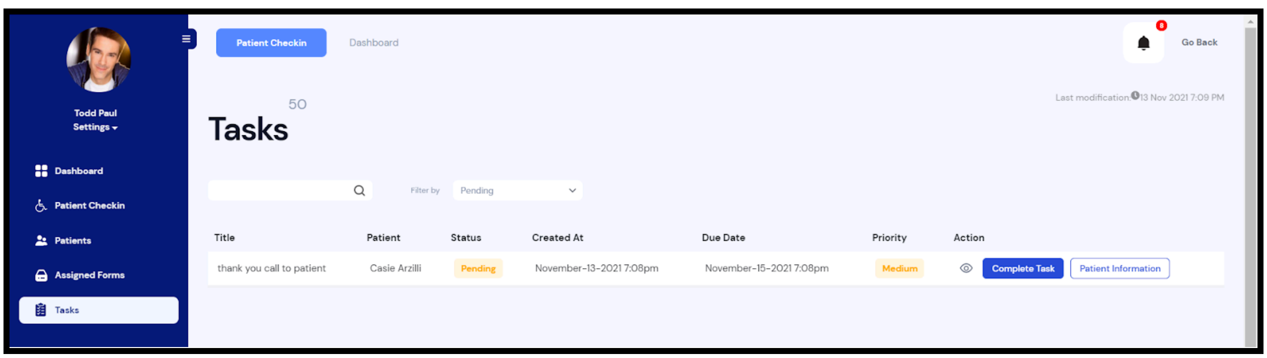


When staff member click on “Complete” button , an email with link will be triggered to that specific external user

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



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.



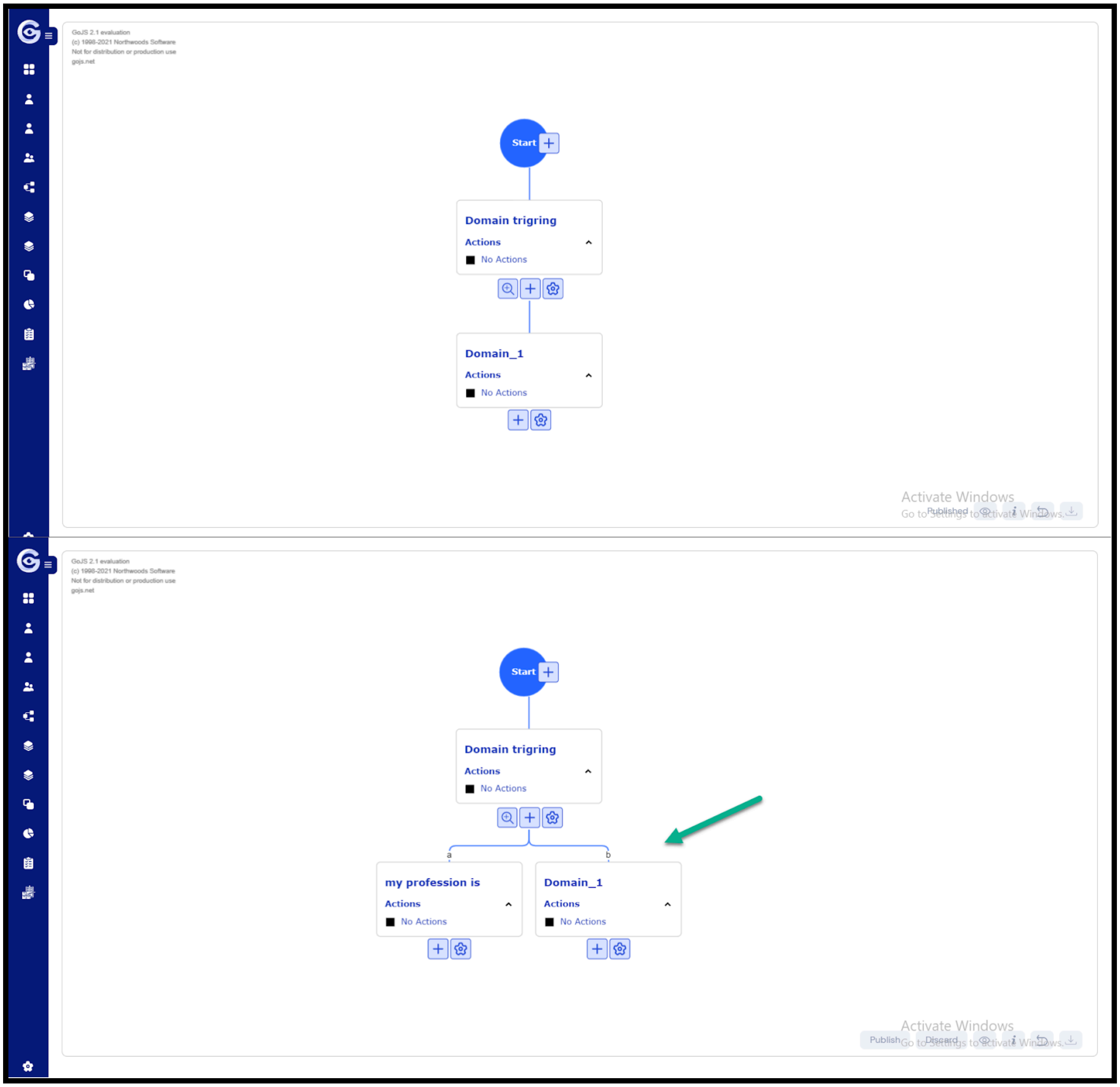
Revisions

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.



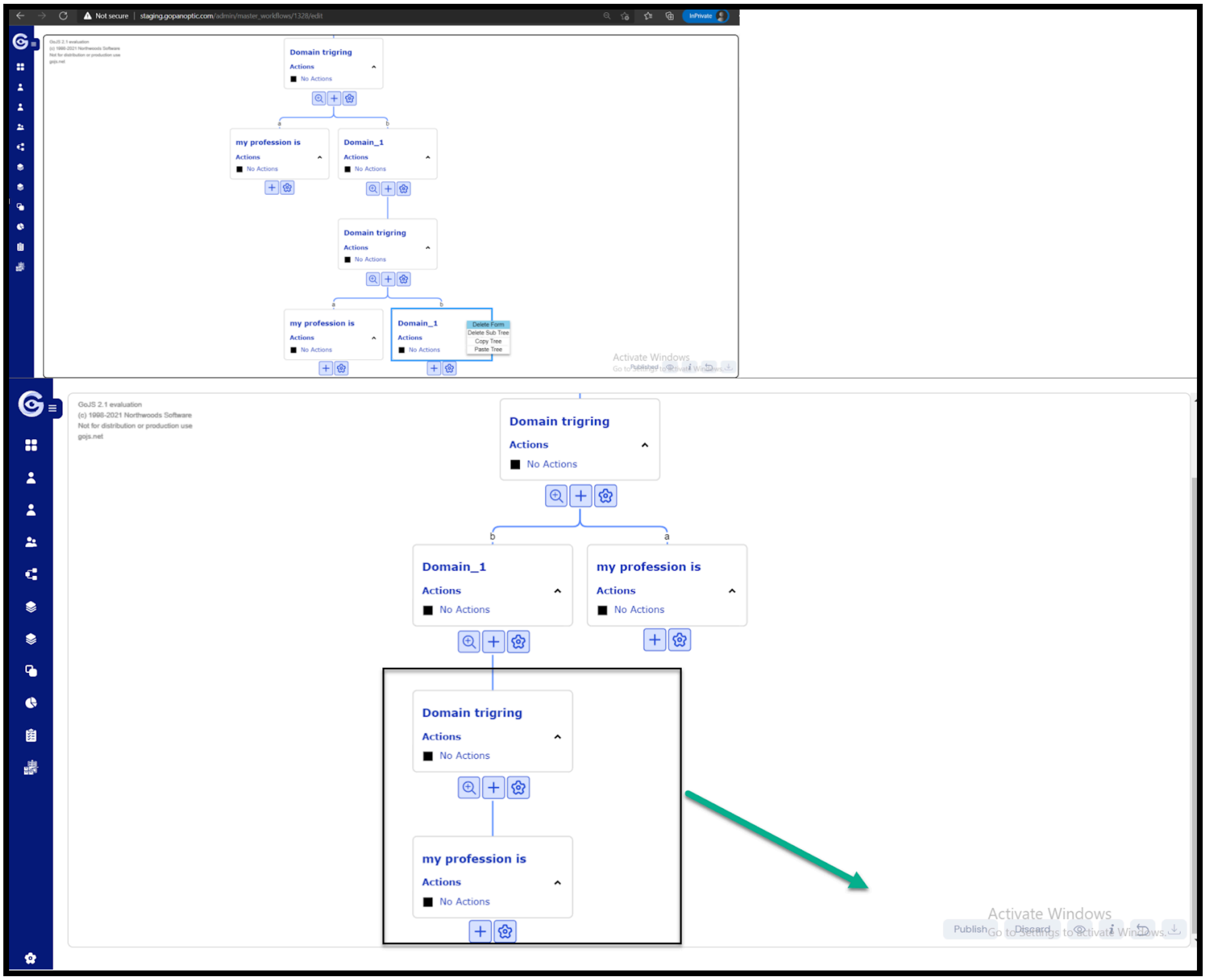
If the user clicks on the “**Publish**” button the changes will be saved, and if the user clicks on the “**Discard**” option the new changes will not be reflected.

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.



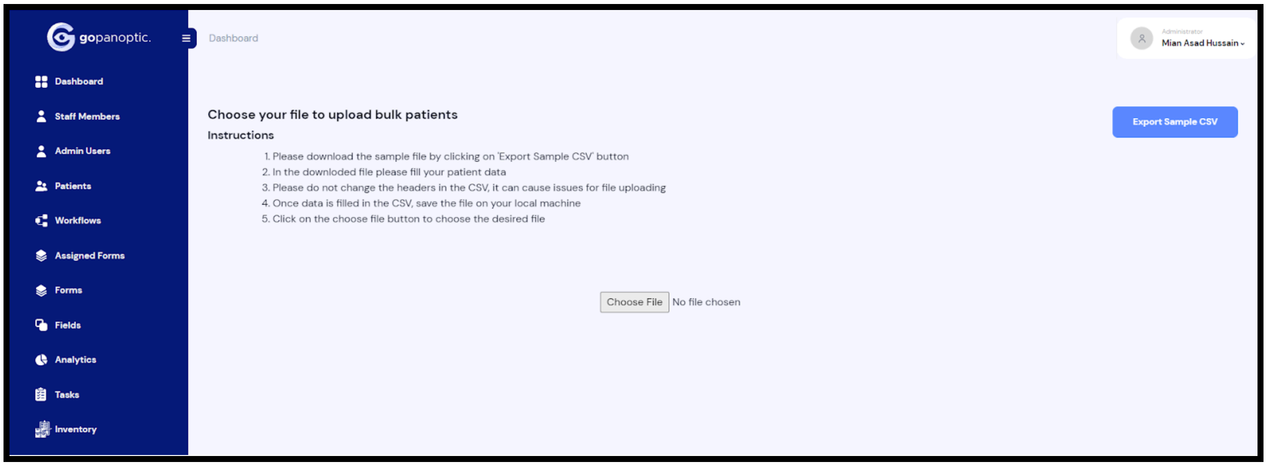
Patients

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

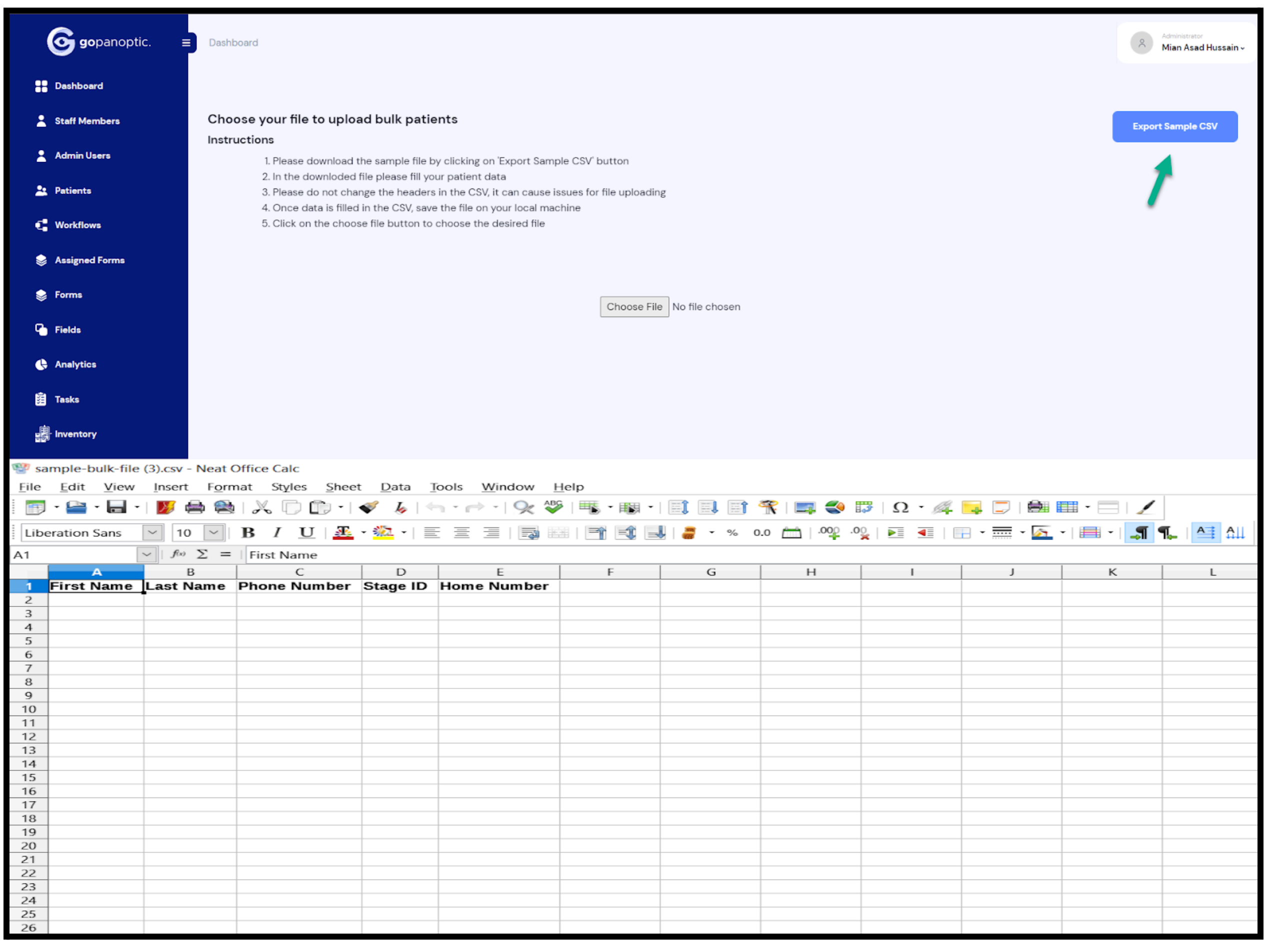
Introduction

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.



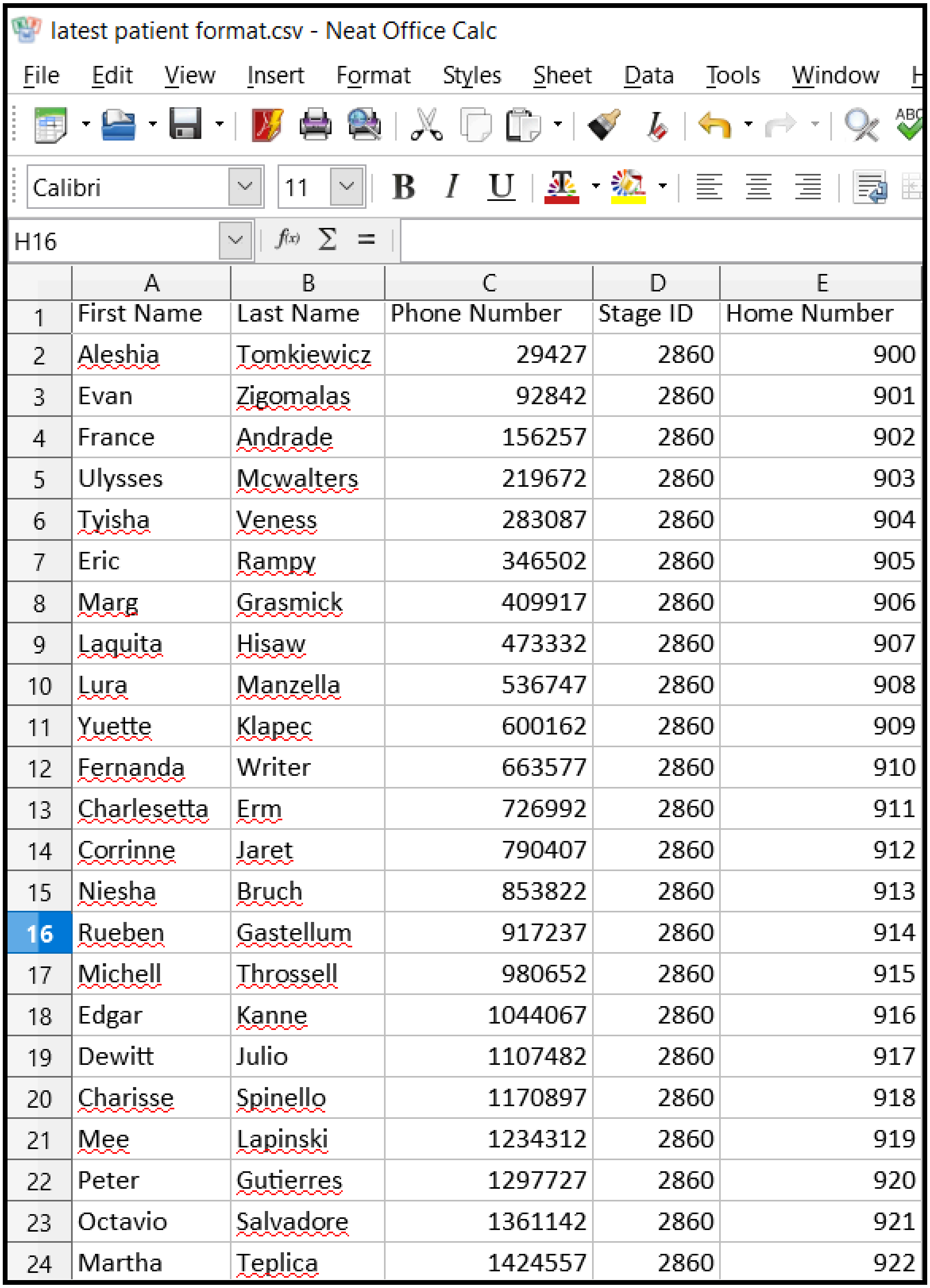
Here you will see the basic instruction for uploading multiple patients.
To do this follow the given instruction above , and some steps given below

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



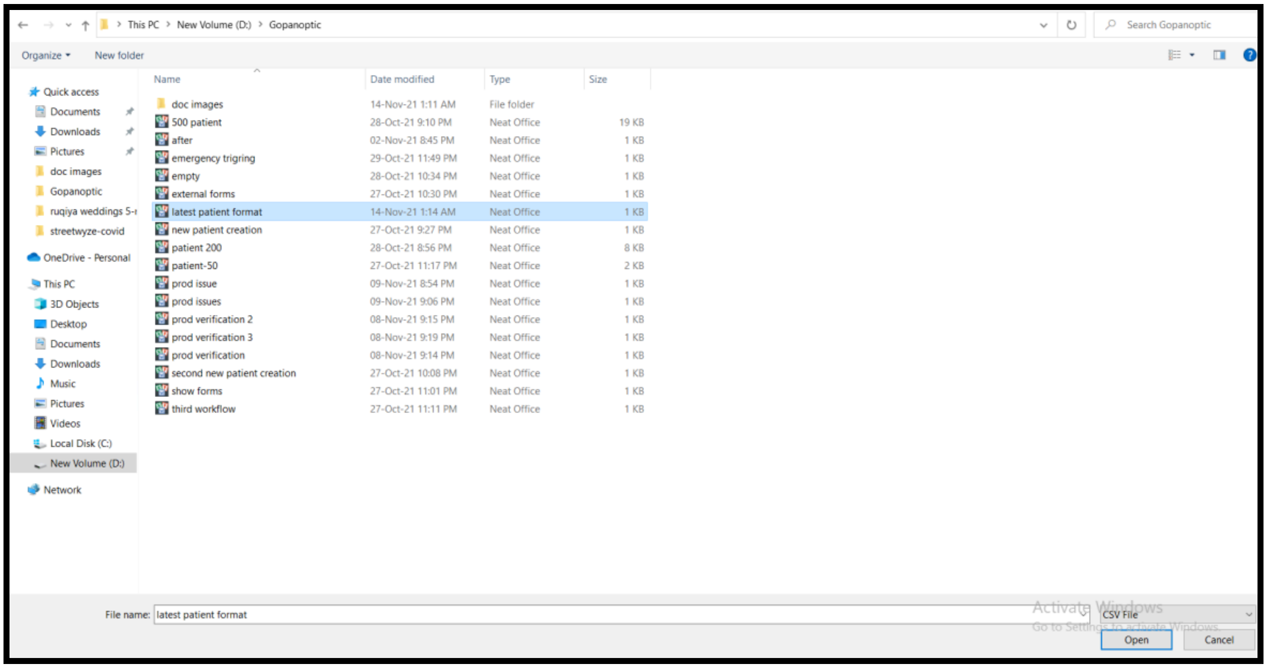
- Enter the first and last name of your patient.
- Enter the unique Phone number.

- 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.

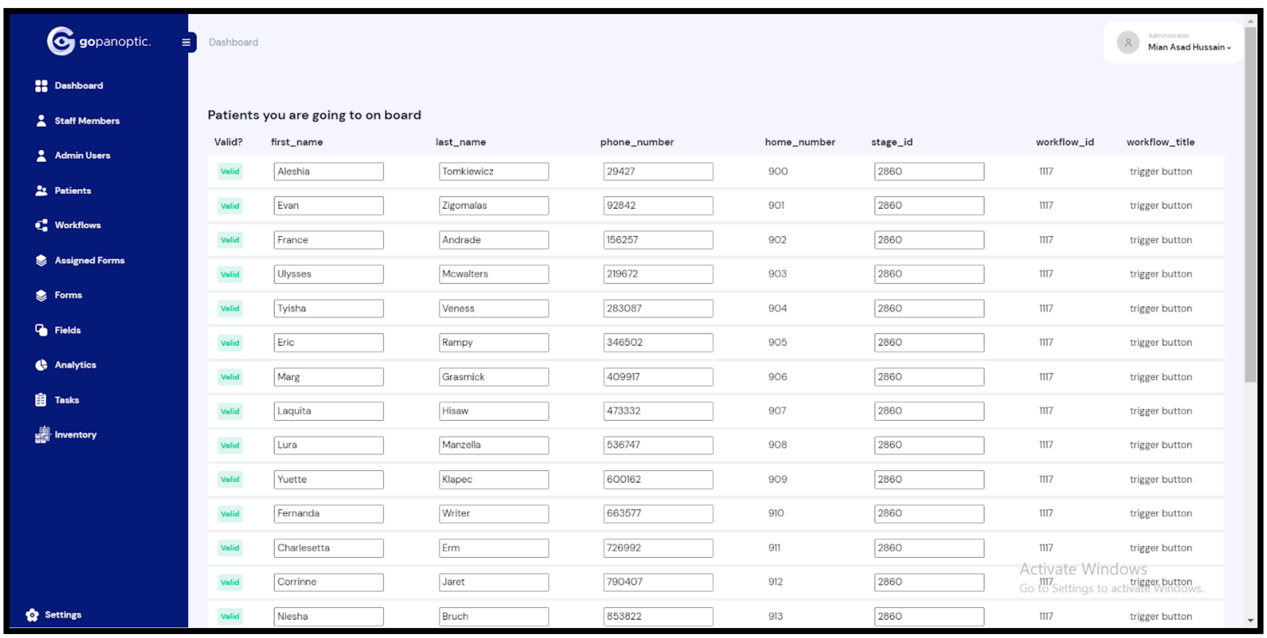


	A	B	C	D	E
1	First Name	Last Name	Phone Number	Stage ID	Home Number
2	Aleshia	Tomkiewicz	29427	2860	900
3	Evan	Zigomalas	92842	2860	901
4	France	Andrade	156257	2860	902
5	Ulysses	Mcwalters	219672	2860	903
6	Tyisha	Veness	283087	2860	904
7	Eric	Rampy	346502	2860	905
8	Marg	Grasmick	409917	2860	906
9	Laquita	Hisaw	473332	2860	907
10	Lura	Manzella	536747	2860	908
11	Yuette	Klapec	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	Gutierres	1297727	2860	920
23	Octavio	Salvadore	1361142	2860	921
24	Martha	Teplica	1424557	2860	922

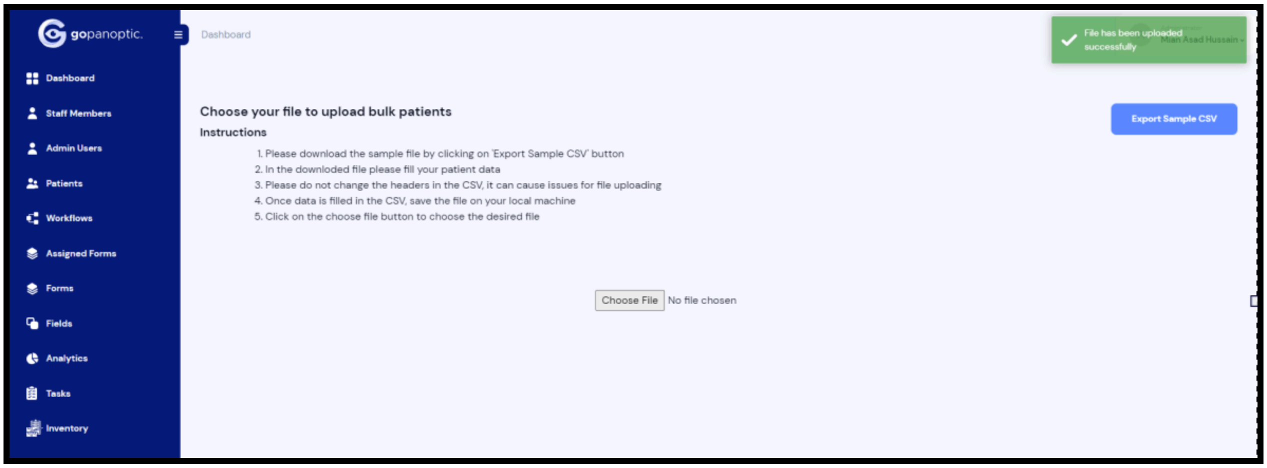
- Click on the "choose file" button, and select your patient csv file.



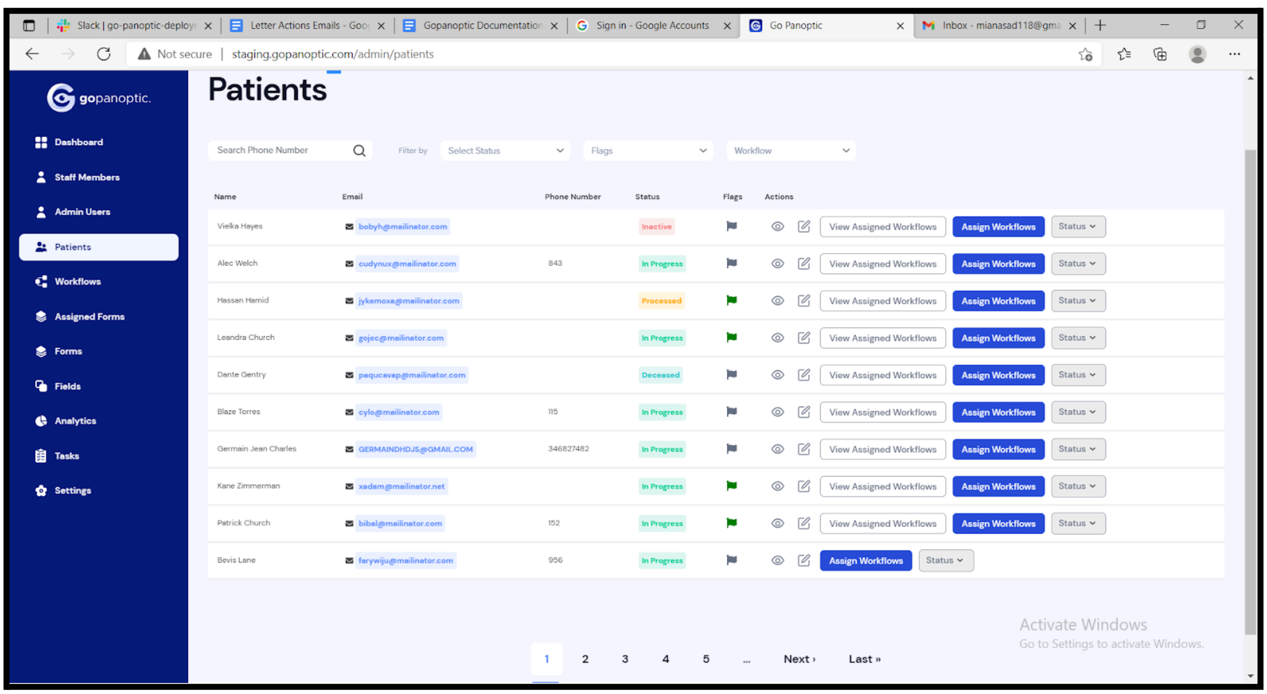
- Once you select your csv , all the data will be pre populated into the bulk upload section as shown below.



- 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.



Admin user activities with Patients section

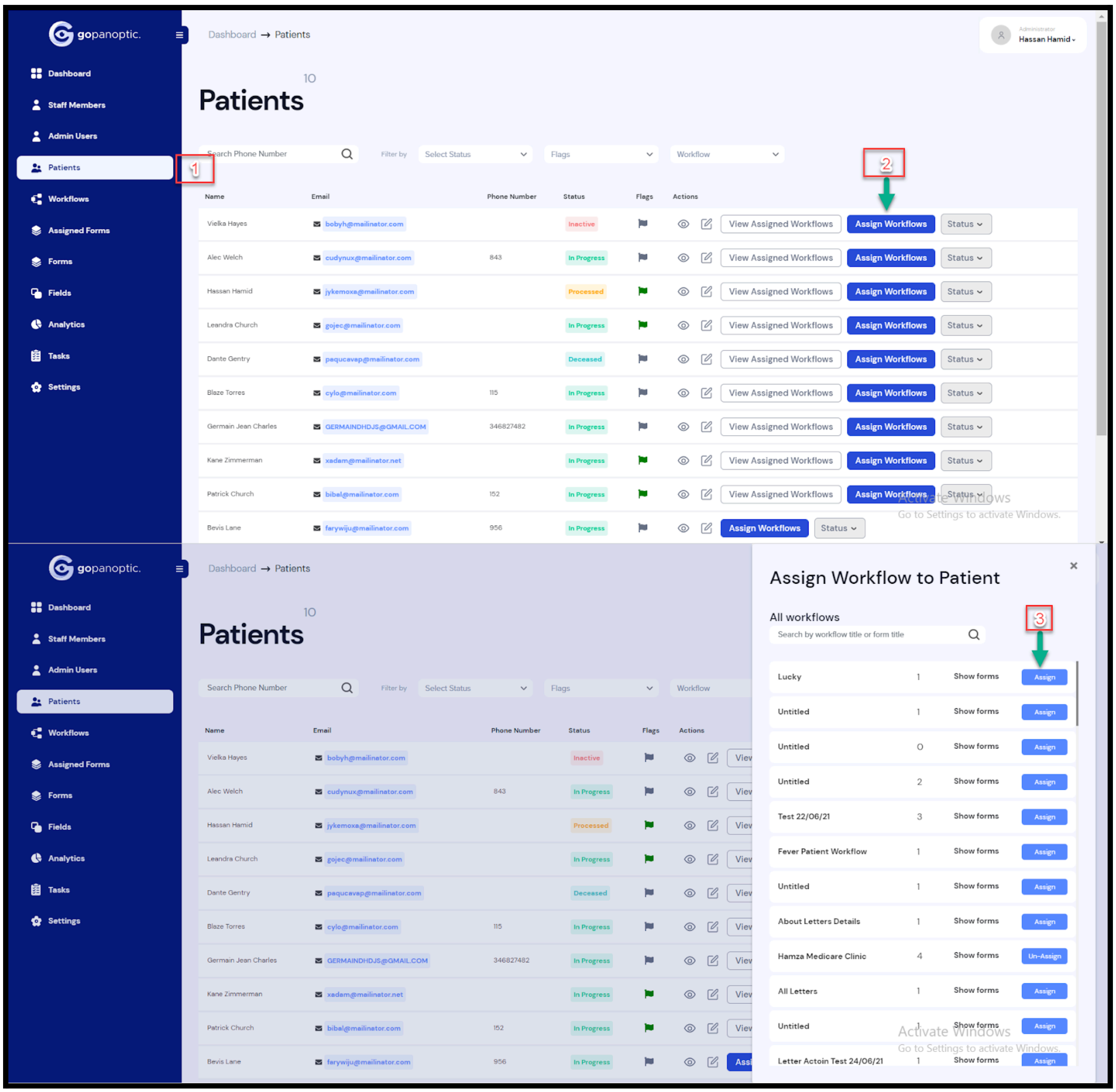
- Admin users can search any particular patient by entering their phone number.
- Admin users can search the patient , by applying filters.

- Admin users can see the assigned workflow for a particular patient through "**view assigned workflow**".

- Assign workflow

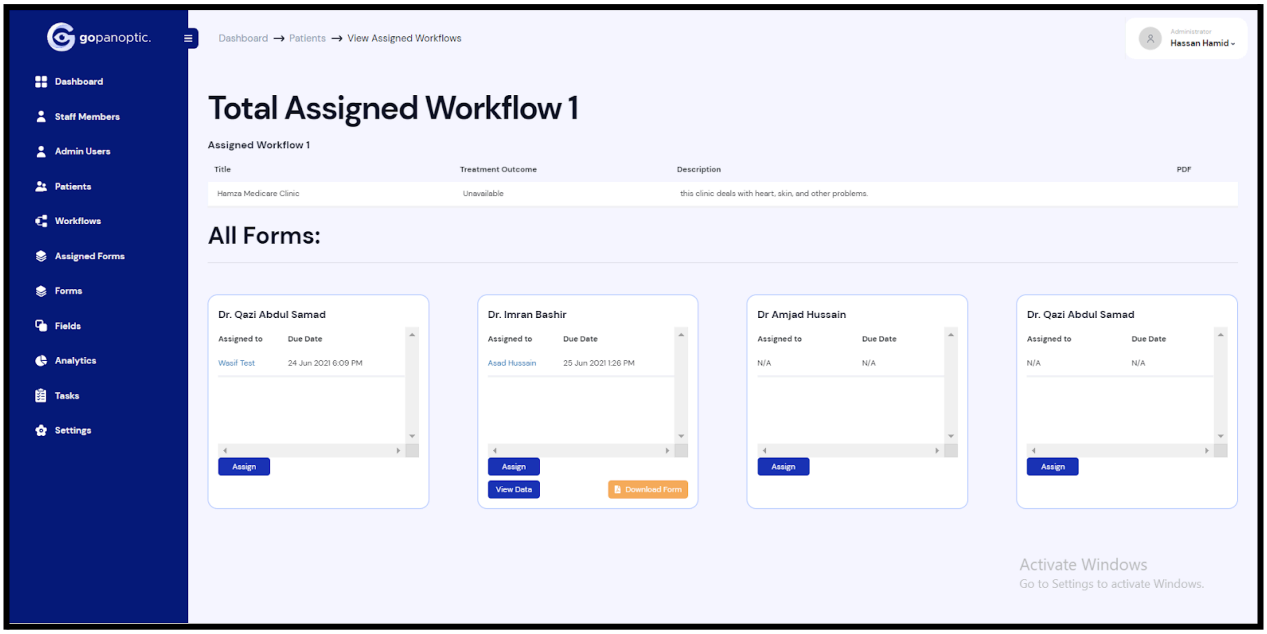
  Above all activities that we performed Such as creating fields, forms, workflows. After doing all of that, the admin will assign workflow to their patients.

How to assign a workflow to patient

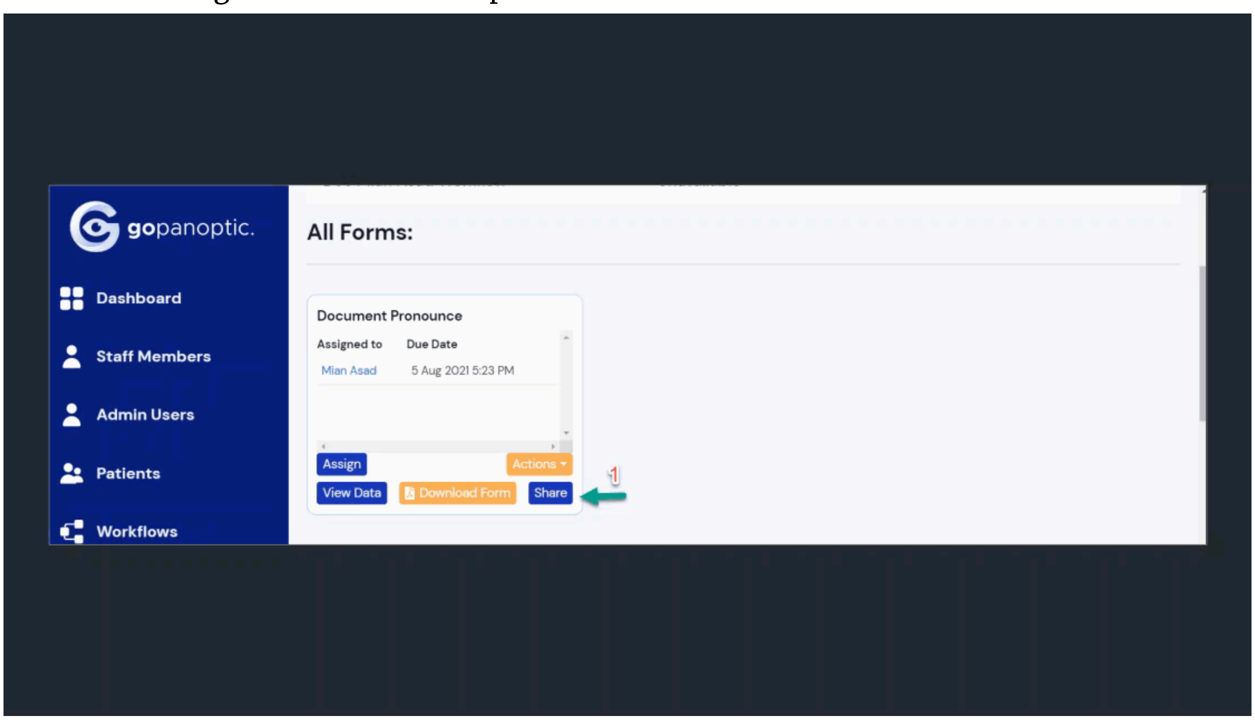


Admin can also "un-assign" any workflow for a particular patient or multiple patients.

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



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

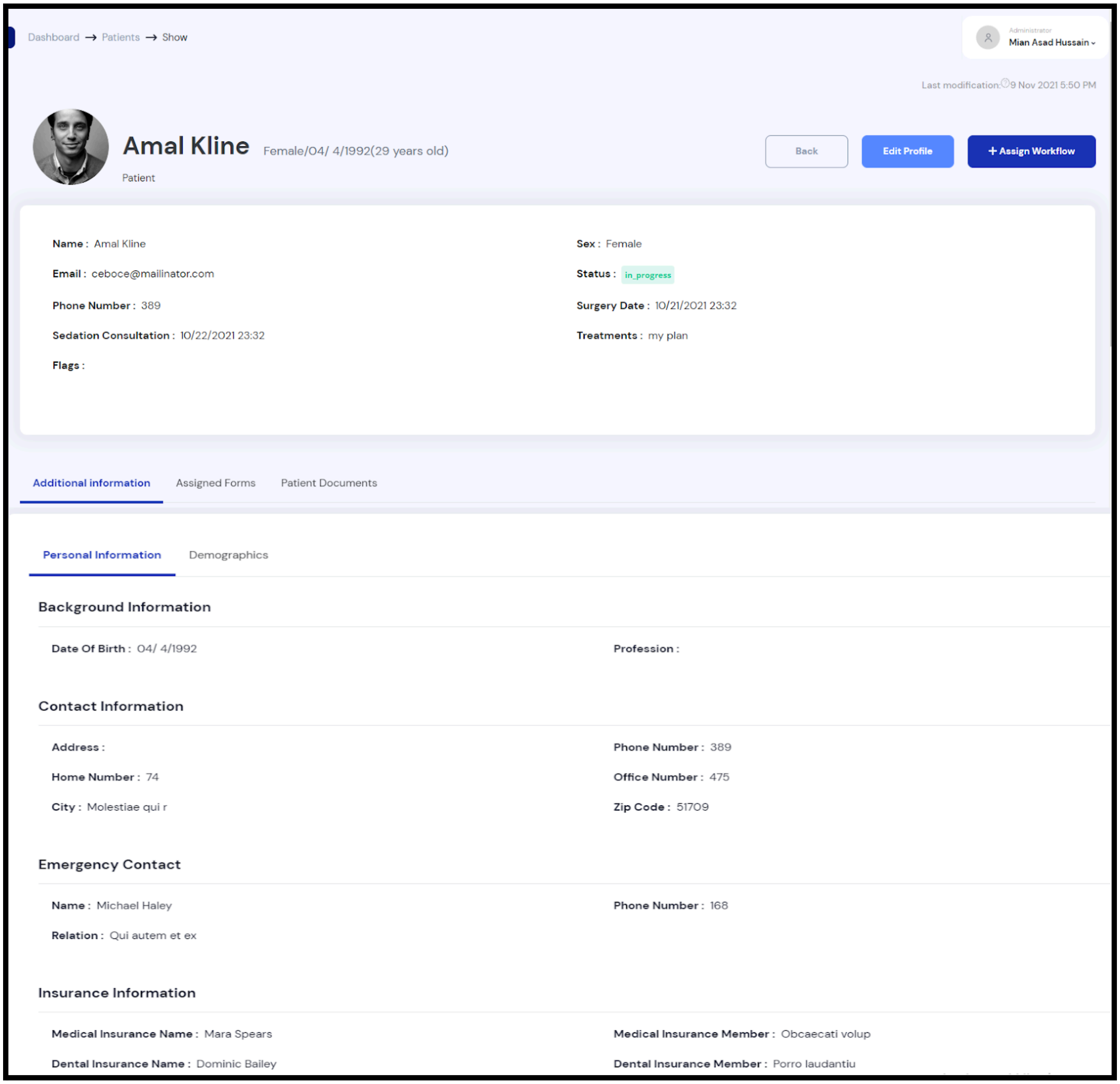


Action Columns

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

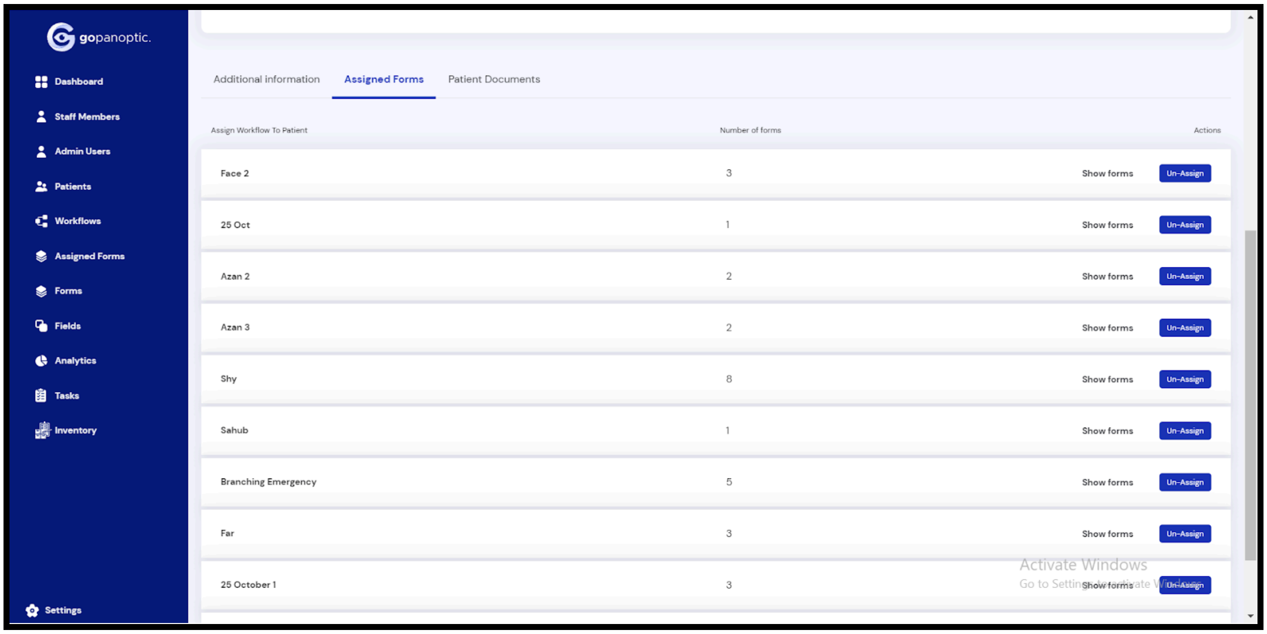
Additional information

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



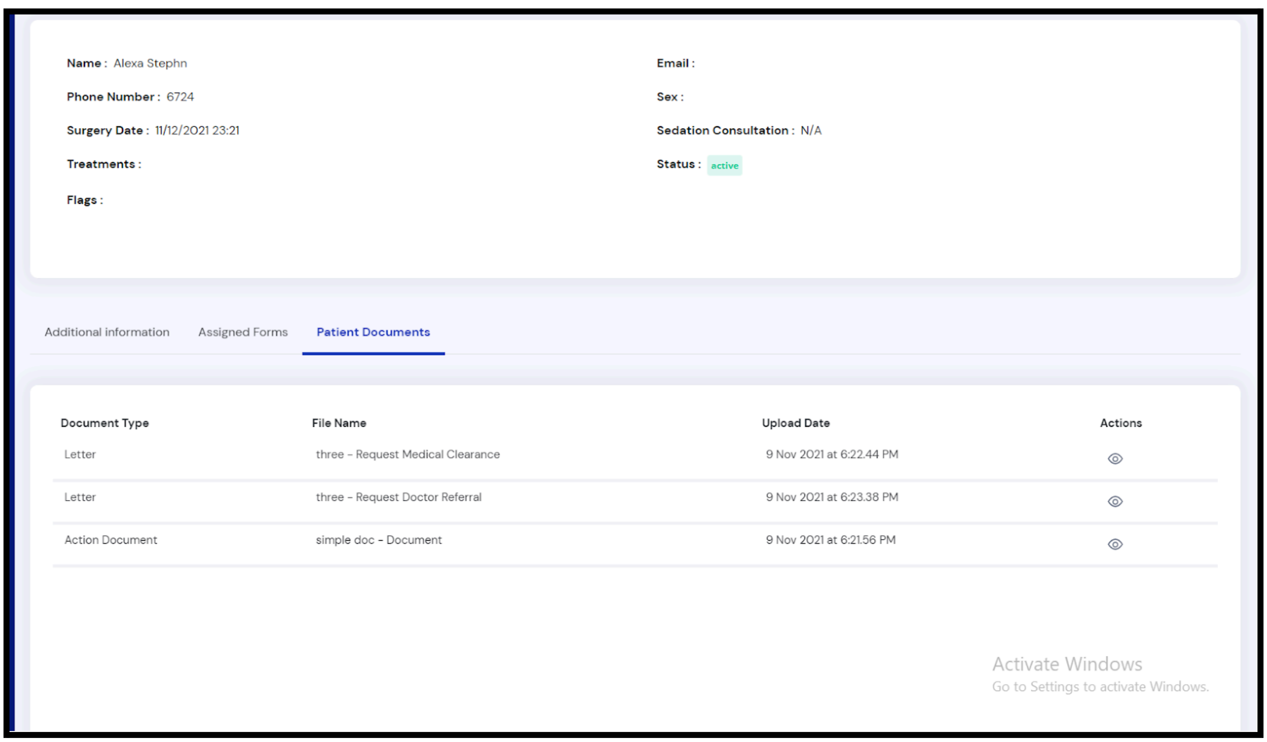
Assigned Forms

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



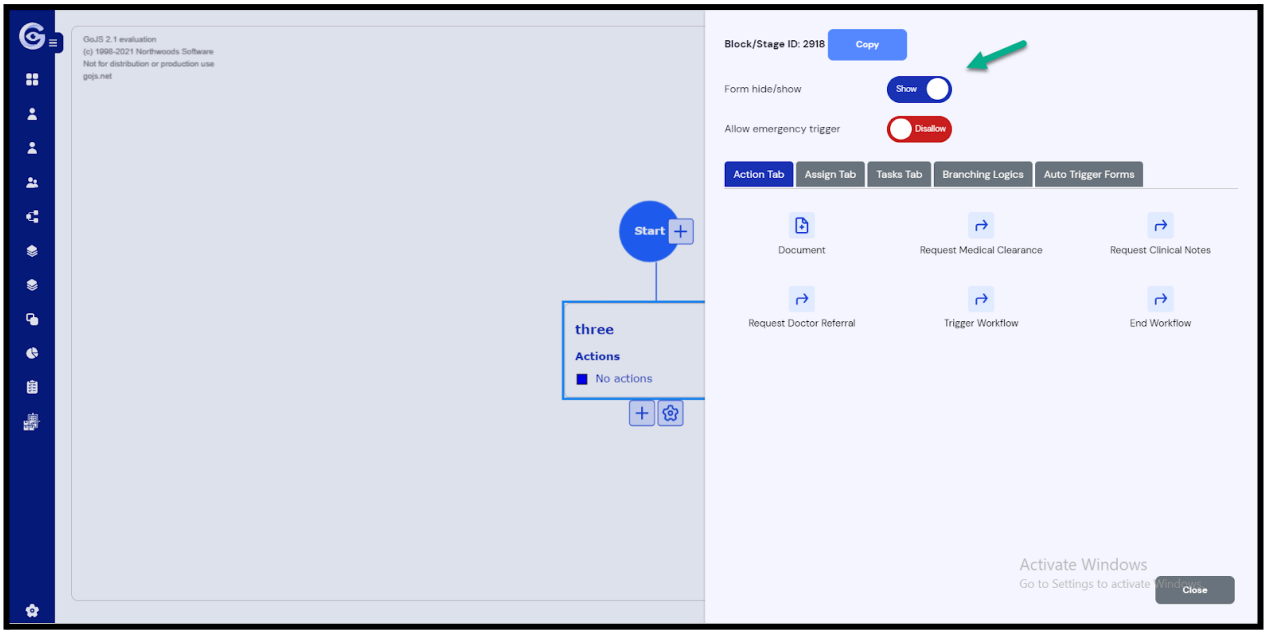
Patient Documents

Once you click on this it will show you the documents for this patient (d0cs, Request medical clearance, request clinical notes, request doctor Referral)



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