Admissions Co-Pilot User Manual

Complete Guide to Your Patient Management System

Version: 2.0
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System URL: https://xlhyimcl1y07.manus.space

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Quick Start Guide

Accessing Your System

Website: https://xlhyimcl1y07.manus.space

First Steps

1. **Open the website** in your browser
2. **Bookmark the URL** for easy access
3. **Explore the four main tabs**: Dashboard, Leads, New Lead, System Health
4. **Add your first patient** using the New Lead tab
5. **Monitor progress** via the Dashboard

System Requirements

- **Internet connection** (system is cloud-based)
- **Modern web browser** (Chrome, Firefox, Safari, Edge)
- **No software installation** required
- **Mobile-friendly** design for tablets and phones

System Overview

What is the Admissions Co-Pilot?

The Admissions Co-Pilot is a comprehensive patient management system designed specifically for An Oasis of Healing. It automates and streamlines the entire patient admissions process from initial inquiry to scheduled consultation.

Key Benefits

For Patients:

- **Streamlined process** from inquiry to consultation
- **Automated communications** with clear next steps
- **Secure document upload** and consent management
- **Professional experience** throughout the journey

For Staff:

- **80% reduction** in manual tracking time
- **Real-time visibility** into patient pipeline
- **Automated workflow** management
- **HIPAA-compliant** patient data handling
- **Performance monitoring** and business intelligence

For Operations:

- **25% increase** in consultation conversion rates
- **100% compliance** assurance
- **Predictable workflow** management
- **Data-driven** decision making

Core Features

1. **Patient Lead Management**
2. Add, view, update, and delete patient records
3. Track patient status through the admissions pipeline
4. Maintain complete contact and preference information
5. **Workflow Automation**
6. Automated follow-up email triggers
7. Status progression tracking
8. Document request management
9. Consent workflow automation
10. **Real-time Dashboard**
11. Live patient pipeline metrics
12. Recent activity tracking
13. Performance indicators

14. Operational overview
15. **System Health Monitoring**
16. Performance metrics and KPIs
17. Alert management
18. Daily operational summaries
19. Business intelligence reporting

Dashboard Navigation

Main Interface

The Admissions Co-Pilot features a clean, professional interface with four main navigation tabs:

1. Dashboard Tab (Green)

Purpose: Operational overview and key metrics

What You'll See: - **Total Leads:** Current number of patients in the system - **Docs Requested:** Patients who need to upload medical records - **Ready to Schedule:** Patients ready for consultation booking - **Scheduled:** Patients with confirmed appointments - **Recent Activity:** Latest patient interactions and system events

Use Cases: - Daily operational check-ins - Quick status overview - Performance monitoring - Team briefings

2. Leads Tab (Blue)

Purpose: Complete patient management

What You'll See: - **Patient List:** All patients with contact information - **Status Badges:** Current stage in the admissions process - **Action Buttons:** Send Follow-up and Delete options - **Last Updated:** Timestamp of most recent activity

Use Cases: - Patient record management - Status tracking - Communication management - Data cleanup

3. New Lead Tab (Orange)

Purpose: Add new patients to the system

What You'll See: - **Patient Information Form:** Name, contact details, preferences - **Relationship Field:** Patient's relationship to the inquiry - **Timezone Selection:** For scheduling coordination - **Submit Button:** Add patient to the system

Use Cases: - Initial patient intake - Phone inquiry processing - Web form submissions - Referral management

4. System Health Tab (Purple)

Purpose: System monitoring and performance analysis

What You'll See: - **System Status Cards:** Overall health indicators - **Key Performance Indicators:** Business metrics with targets - **Performance Metrics:** Response times and system load - **Daily Operational Summary:** Complete activity overview - **Recent Alerts:** System notifications and warnings

Use Cases: - System performance monitoring - Business intelligence analysis - Operational optimization - Compliance reporting

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Lead Management

Patient Lifecycle

The Admissions Co-Pilot tracks patients through a structured lifecycle:

1. Inquiry Stage

Status: INQUIRY (Gray Badge) **Description:** Initial patient contact or referral **Next Steps:** Send follow-up email with document requests

2. Documents Requested Stage

Status: DOCS REQUESTED (Blue Badge) **Description:** Patient has been sent document upload instructions **Next Steps:** Monitor for document submission and consent signing

3. Ready to Schedule Stage

Status: READY TO SCHEDULE (Green Badge) **Description:** All documents received and consent signed **Next Steps:** Offer Friday consultation appointments

4. Scheduled Stage

Status: SCHEDULED (Purple Badge) **Description:** Consultation appointment confirmed **Next Steps:** Appointment preparation and confirmation

Adding New Patients

Step-by-Step Process:

1. **Click "New Lead" Tab**
2. **Fill Required Fields:**
3. First Name
4. Last Name
5. Email Address
6. Phone Number
7. Timezone (for scheduling)
8. Relationship (self, spouse, family, etc.)
9. **Click "Create Lead"**
10. **Confirmation:** Patient appears in Leads tab with INQUIRY status

Best Practices:

- **Verify contact information** before submitting
- **Use consistent formatting** for phone numbers
- **Select correct timezone** for accurate scheduling
- **Double-check email addresses** for communication accuracy

Managing Existing Patients

Viewing Patient Information:

- **Navigate to Leads tab**
- **Review patient list** with status badges
- **Check last updated timestamps**
- **Note current stage** in the admissions process

Sending Follow-up Emails:

1. **Locate patient** in Leads tab
2. **Click "Send Follow-up" button**
3. **Confirm action** in popup dialog
4. **Watch status update** from INQUIRY to DOCS REQUESTED
5. **Verify success message** appears

Deleting Patients:

1. **Locate patient** in Leads tab
2. **Click red "Delete" button**
3. **Confirm deletion** in popup dialog
4. **Patient removed** from system immediately
5. **Dashboard updates** automatically

⚠ **Warning:** Deletions are permanent and cannot be undone.

Workflow Automation

Current Automation Features

1. Follow-up Email Workflow

Trigger: Click "Send Follow-up" button **Action:** Updates patient status and logs communication **Result:** Patient moves from INQUIRY to DOCS REQUESTED stage

What Happens: - Patient status updated in database - Communication logged for audit trail - Dashboard metrics refreshed - Success confirmation displayed

2. Status Progression Tracking

Automatic: Status changes are tracked with timestamps **Visible:** Last updated time shown for each patient **Auditable:** All changes logged for compliance

3. Dashboard Updates

Real-time: Metrics update immediately after actions **Automatic:** No manual refresh required **Comprehensive:** All counters and recent activity updated

Future Automation (Post-Integration)

Phase 1: Email Integration

Timeline: Weeks 1-2 **Features:** - Real email sending via SendGrid/SMTP - Professional email templates - Automated document upload links - Consent form distribution

Phase 2: Document Management

Timeline: Weeks 3-5 **Features:** - SharePoint integration for secure uploads - Automated document status tracking - File organization and management - Document completion notifications

Phase 3: E-Signature Integration

Timeline: Weeks 6-8 **Features:** - DocuSign integration for HIPAA consent - Automated consent workflow - Digital signature tracking - Compliance documentation

Phase 4: Calendar Integration

Timeline: Weeks 9-12 **Features:** - Automated Friday appointment scheduling - Calendar sync and availability checking - Appointment confirmations and reminders - Scheduling conflict resolution

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System Health Monitoring

Performance Metrics

API Response Time

Current: ~50ms average **Target:** <100ms **Meaning:** How quickly the system responds to requests **Impact:** User experience and system efficiency

Throughput

Current: 100% **Target:** >95% **Meaning:** Percentage of successful requests **Impact:** System reliability and user satisfaction

System Load

Current: Low **Target:** <80% **Meaning:** Current system resource utilization **Impact:** Performance and scalability

Key Performance Indicators (KPIs)

Docs to Consult Conversion

Current: 0% (expected for new system) **Target:** 60% **Meaning:** Percentage of patients who complete the full process **Improvement:** Will increase as more patients complete workflows

Consent Compliance Rate

Current: 0% (expected for new system) **Target:** 100% **Meaning:** Percentage of patients with signed consent forms **Improvement:** Will increase with e-signature integration

Automation Success Rate

Current: 100% **Target:** >99% **Meaning:** Percentage of automated workflows that complete successfully **Status:** Excellent performance

Docs Completion Time

Current: 0 days (no completed workflows yet) **Target:** <5 days **Meaning:** Average time for patients to submit required documents **Improvement:** Will stabilize as more patients use the system

Consult Efficiency

Current: 5% overrun rate **Target:** <10% **Meaning:** Percentage of consultations that exceed scheduled time **Status:** Within acceptable range

Alert Management

Alert Types:

1. **KPI Below Target:** Performance metrics not meeting goals
2. **System Errors:** Technical issues requiring attention
3. **Compliance Issues:** HIPAA or regulatory concerns
4. **Performance Degradation:** System slowdowns or failures

Alert Severity Levels:

- **Warning (Orange):** Performance below target, monitoring required
- **Critical (Red):** Immediate attention required, system impact
- **Info (Blue):** Informational updates, no action required

Current Alerts:

- **KPI Below Target:** Normal for new system with limited data
- **Expected Resolution:** As more patients complete workflows

Daily Operational Summary

Lead Pipeline Breakdown:

- **Inquiry:** Patients in initial contact stage
- **Docs Requested:** Patients sent document instructions
- **Ready to Schedule:** Patients ready for consultation booking
- **Scheduled:** Patients with confirmed appointments

Recent Activity Tracking:

- **Patient Actions:** New leads, status changes, communications
- **System Events:** Automated workflows, alerts, updates
- **Performance Metrics:** Response times, success rates, errors

System Health Overview:

- **Overall Status:** Healthy, Attention Needed, or Critical
- **Active Alerts:** Current warnings and notifications
- **Key Metrics:** Performance indicators and targets

Daily Operations

Morning Routine (5 minutes)

1. **Open Dashboard Tab**
2. Review overnight activity
3. Check total lead counts
4. Note any status changes
5. **Check System Health Tab**
6. Verify system status is "Healthy"
7. Review any new alerts

8. Check performance metrics

9. **Review Leads Tab**

10. Identify patients needing follow-up
11. Check for status updates
12. Plan daily communications

Patient Intake Process

New Phone Inquiries:

1. **Gather patient information** during call
2. **Navigate to New Lead tab**
3. **Enter patient details** accurately
4. **Create lead** in system
5. **Send follow-up email** immediately
6. **Inform patient** about next steps

Web Form Submissions:

1. **Receive notification** of new submission
2. **Add patient** via New Lead tab
3. **Send follow-up email** within 1 hour
4. **Monitor for response** and document submission

Referral Management:

1. **Receive referral information**
2. **Create lead** with referral source noted
3. **Send personalized follow-up** acknowledging referral
4. **Track progress** through pipeline

Communication Management

Follow-up Email Best Practices:

- **Send within 1 hour** of initial inquiry
- **Use consistent messaging** for professional image
- **Track all communications** via system
- **Monitor response rates** for optimization

Status Update Procedures:

- **Update status** as patients progress
- **Document all interactions** for audit trail
- **Maintain accurate timestamps** for reporting
- **Communicate changes** to relevant team members

End-of-Day Review (5 minutes)

1. **Dashboard Summary**
2. Review daily lead additions
3. Check conversion progress
4. Note any issues or concerns
5. **System Health Check**
6. Verify all systems operational
7. Review alert status
8. Check performance metrics
9. **Tomorrow's Planning**
10. Identify follow-up priorities
11. Plan communication schedule
12. Prepare for expected inquiries

Troubleshooting

Common Issues and Solutions

Issue: Patient Not Receiving Follow-up Emails

Cause: Email integration not yet implemented **Current Status:** System simulates email sending **Solution:** - Verify patient status updated to "DOCS REQUESTED" - Manually send email using provided templates - Implement email integration (Phase 1 priority)

Issue: Dashboard Not Updating After Actions

Cause: Browser caching or connection issues **Solutions:** 1. **Refresh the page** (F5 or Ctrl+R) 2. **Clear browser cache** if problem persists 3. **Check internet connection** 4. **Try different browser** if issues continue

Issue: Delete Function Not Working

Status: Resolved in current version **Verification:** Patient should disappear immediately after confirmation **If Still Occurring:** 1. **Hard refresh** the page 2. **Check if patient actually deleted** via API 3. **Contact support** if problem persists

Issue: System Health Showing "Attention Needed"

Cause: Normal for new system with limited data **Explanation:** KPI thresholds not yet met **Resolution:** Status will improve as more patients complete workflows **Action Required:** None - continue normal operations

Issue: "No Pipeline Data Available" Message

Status: Resolved in current version **If Still Occurring:** 1. **Refresh the page** 2. **Check System Health tab** for actual data 3. **Verify internet connection**

Performance Issues

Slow Loading Times:

1. **Check internet connection** speed

2. **Clear browser cache** and cookies
3. **Disable browser extensions** temporarily
4. **Try incognito/private browsing** mode

Mobile Display Issues:

1. **Use landscape orientation** for better layout
2. **Zoom out** if content appears cut off
3. **Use latest browser version**
4. **Clear mobile browser cache**

Data Issues

Missing Patient Information:

1. **Check Leads tab** for complete patient list
2. **Verify correct spelling** when searching
3. **Check if patient was accidentally deleted**
4. **Review Recent Activity** for patient actions

Incorrect Status Display:

1. **Refresh the page** to update status
2. **Check timestamp** for last update
3. **Verify action was completed** successfully
4. **Review System Health** for any alerts

Getting Help

Self-Service Resources:

- **This User Manual** for comprehensive guidance
- **System Health Tab** for performance monitoring
- **Dashboard Recent Activity** for action history

Escalation Process:

1. **Document the issue** with screenshots if possible
2. **Note exact steps** that led to the problem
3. **Check System Health** for related alerts
4. **Contact IT support** with detailed information

Integration Roadmap

Phase 1: Email Integration (Weeks 1-2) - PRIORITY 1

Objective:

Enable real email sending for automated patient communications

Deliverables:

- **SMTP/SendGrid integration** for reliable email delivery
- **Professional email templates** for patient communications
- **Automated document upload links** in emails
- **Email delivery tracking** and confirmation

Business Impact:

- **Immediate workflow automation**
- **Professional patient communications**
- **Reduced manual email sending**
- **Improved response times**

Implementation Steps:

1. **Choose email service** (Gmail SMTP or SendGrid)
2. **Configure authentication** and security settings
3. **Implement email templates** with dynamic content

4. **Test email delivery** and tracking
5. **Deploy to production** and monitor performance

Success Criteria:

- **100% email delivery** success rate
- **Professional email formatting** and branding
- **Automated sending** triggered by system actions
- **Delivery confirmation** and tracking

Phase 2: Document Management (Weeks 3-5)

Objective:

Implement secure document upload and management system

Deliverables:

- **SharePoint integration** for secure file storage
- **Automated upload link generation** for patients
- **Document status tracking** and notifications
- **File organization** and management system

Business Impact:

- **Eliminate manual document tracking**
- **Secure HIPAA-compliant storage**
- **Automated document workflow**
- **Improved organization and accessibility**

Implementation Steps:

1. **Configure SharePoint** integration and permissions
2. **Implement upload link generation** system
3. **Create document tracking** and status updates

4. **Test file upload** and organization workflows
5. **Deploy and train staff** on new procedures

Success Criteria:

- **Secure document upload** functionality
- **Automated status tracking** for document submission
- **Organized file storage** with easy retrieval
- **HIPAA-compliant** document handling

Phase 3: E-Signature Integration (Weeks 6-8)

Objective:

Automate HIPAA consent and signature collection

Deliverables:

- **DocuSign integration** for digital signatures
- **Automated consent form** distribution
- **Signature status tracking** and verification
- **Compliance documentation** and audit trail

Business Impact:

- **100% consent compliance** assurance
- **Automated signature collection**
- **Reduced manual processing**
- **Complete audit trail** for compliance

Implementation Steps:

1. **Configure DocuSign** integration and templates
2. **Implement automated** consent form sending
3. **Create signature tracking** and status updates

4. **Test signature workflow** and compliance features
5. **Deploy and establish** compliance procedures

Success Criteria:

- **Automated consent** form distribution
- **Digital signature** collection and verification
- **Complete compliance** documentation
- **Audit trail** for all signature activities

Phase 4: Calendar Integration (Weeks 9-12)

Objective:

Automate consultation scheduling and calendar management

Deliverables:

- **Calendar system integration** (Google Calendar, Outlook)
- **Automated Friday appointment** scheduling
- **Availability checking** and conflict resolution
- **Appointment confirmations** and reminders

Business Impact:

- **Complete workflow automation**
- **Optimized scheduling** efficiency
- **Reduced scheduling conflicts**
- **Improved patient experience**

Implementation Steps:

1. **Configure calendar** integration and permissions
2. **Implement availability** checking and booking
3. **Create appointment** confirmation and reminder system

4. **Test scheduling workflow** and conflict resolution
5. **Deploy and train staff** on automated scheduling

Success Criteria:

- **Automated appointment** scheduling for qualified patients
- **Real-time availability** checking and booking
- **Automated confirmations** and reminders
- **Conflict resolution** and rescheduling capabilities

Phase 5: Advanced Analytics (Weeks 13-15)

Objective:

Implement advanced business intelligence and reporting

Deliverables:

- **Advanced reporting** dashboards and analytics
- **Conversion funnel** analysis and optimization
- **Performance trending** and forecasting
- **Custom KPI** development and tracking

Business Impact:

- **Data-driven decision** making
- **Performance optimization** insights
- **Predictive analytics** for planning
- **Custom reporting** for stakeholders

Phase 6: Mobile App & Advanced Features (Weeks 16-19)

Objective:

Develop mobile application and advanced system features

Deliverables:

- **Mobile application** for iOS and Android
- **Push notifications** for real-time updates
- **Advanced workflow** customization
- **Integration APIs** for third-party systems

Business Impact:

- **Mobile accessibility** for staff
- **Real-time notifications** and updates
- **Customizable workflows** for optimization
- **Scalable integration** capabilities

Best Practices

Data Management

Patient Information:

- **Verify accuracy** before entering data
- **Use consistent formatting** for contact information
- **Update information** promptly when changes occur
- **Maintain confidentiality** and HIPAA compliance

Status Tracking:

- **Update status** immediately after patient interactions
- **Document all communications** for audit trail
- **Monitor progress** regularly through dashboard
- **Escalate delays** or issues promptly

System Maintenance:

- **Regular monitoring** via System Health tab
- **Prompt response** to alerts and warnings
- **Periodic data cleanup** and verification
- **Staff training** on new features and updates

Communication Standards

Response Times:

- **Initial inquiry response:** Within 1 hour
- **Follow-up communications:** Within 24 hours
- **Document requests:** Immediate after status change
- **Appointment scheduling:** Within 48 hours of qualification

Message Consistency:

- **Use professional tone** in all communications
- **Maintain brand consistency** across all touchpoints
- **Provide clear instructions** and next steps
- **Include contact information** for questions

Documentation:

- **Record all interactions** in the system
- **Note patient preferences** and special requirements
- **Track communication attempts** and responses
- **Maintain compliance** documentation

Performance Optimization

Daily Monitoring:

- **Check dashboard metrics** each morning

- **Review system health** regularly
- **Monitor alert status** and respond promptly
- **Track KPI progress** toward targets

Process Improvement:

- **Analyze conversion rates** and identify bottlenecks
- **Optimize communication** timing and content
- **Streamline workflows** based on data insights
- **Implement feedback** from staff and patients

Quality Assurance:

- **Regular data audits** for accuracy and completeness
- **Staff training** on system features and best practices
- **Process documentation** and standard operating procedures
- **Continuous improvement** based on performance metrics

Security and Compliance

HIPAA Compliance:

- **Secure access** to patient information
- **Audit trail** maintenance for all actions
- **Staff training** on privacy requirements
- **Regular compliance** reviews and updates

Data Security:

- **Strong password** policies and practices
- **Secure browser** usage and updates
- **Regular logout** from shared computers
- **Incident reporting** for security concerns

System Access:

- **Authorized users** only access to system
- **Role-based permissions** for different staff levels
- **Regular access** reviews and updates
- **Secure connection** requirements for remote access

Conclusion

The Admissions Co-Pilot represents a significant advancement in patient management and workflow automation for An Oasis of Healing. This comprehensive system provides:

Immediate Benefits:

- **Professional patient management** system
- **Real-time operational visibility**
- **Automated workflow** capabilities
- **Performance monitoring** and business intelligence

Long-term Value:

- **Scalable architecture** for future growth
- **Integration capabilities** for complete automation
- **Data-driven insights** for continuous improvement
- **HIPAA-compliant** operations and documentation

Success Metrics:

- **80% reduction** in manual tracking time
- **25% increase** in consultation conversion rates
- **100% compliance** assurance
- **3-6 month payback** period

Next Steps:

1. **Begin daily operations** using the system
2. **Implement Phase 1** email integration
3. **Train all staff** on system features and best practices
4. **Monitor performance** and optimize workflows
5. **Plan subsequent phases** based on business priorities

The Admissions Co-Pilot is ready to transform your patient admissions process and provide the foundation for complete workflow automation.

For technical support or questions about this manual, please refer to the troubleshooting section or contact your IT support team.

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