

Carmel Healthcare Private Limited

Accepted Criteria Document

Version 4.0

Pharmacy Accepted Criteria Document

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Version Control			
Si.No	Date	Version	Description
1	22/05/2017	v1.0	Basic Structure of the Document
2	12/06/2017	V2.0	Added Chat, Email Integration Modules
3	24/06/2017	V3.0	Added few points
4	28/06/2017	V4.0	Elaborated the ACD points
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Section	Sub Section	Req #	Requirements	Comments
Pharmacy Application				
Masters	Company Masters	1.	Ability to capture all the relevant information about the company.	
		2.	Ability to Capture the following information: Name of the Company Drug License Number CIN PAN	
		3.	Ability to mark a particular branch as the Head Office	
		4.	Ability to add multiple branch	
		5.	Ability to capture Address in detail. A GST Number is mapped to particular branch. If the user wants to add multiple branch with in the same state then the same GST number is applied. If the branch is created in the new state then a new GST number has to be captured.	
		6.	GST is linked to the State.	
	Roles	7.	Ability to create Multiple users in the system.	
		8.	Ability to assign roles module wise. For instance, Finance team should be able to see Reports Section alone. Ability to assign roles module wise and sub module wise. Screen wise is recommended.	
		9.	Ability to assign roles based on access such as Read, Write, Modify/update and Download.	Read access is read only. Write is to create a new record. Modify/update is to update something in the existing record. Download is if the user wants to download a report or invoice or any document generated by the system.
		10.	Ability to create roles by the Super Admin.	Download only for the Super admin
	Stock Master	11.	Ability to Capture the Stock Name	
		12.	Ability to Capture the Stock type i.e. Tablets, Capsules, Gel, Cream etc.	

		13.	Ability to Capture if Sold in Strips and if yes to capture Number of Tablets in Strips. Strips are only applicable for Tablets and Capsules. Sometimes the tablets could come in bottles as well.	
		14.	Ability to classify a stock as Tablets, Syrup, Lotion, IV, etc. The user should be able to create stock type.	
		15.	Ability for the stock to capture the Stock details. The system should capture the Composition and Stock Short Description and Stock code. Stock code is a unique code that the system has to automatically generated. The stock description will be entered by the user. For example: DOLO 650mg short description will be DOL650.	
		16.	In the Master for each composition, the Age parameter has to be captured. If the composition can be consumed by say age between 30 to 50 then it has to be mentioned. If the physician prescribes it with the patient age which doesn't match then there must be an alert.	
		17.	Ability to capture difference brands for the same stock code / composition. Once this is captured the system should assign a new code which should default in all the invoice. This code is also important to map with respective vendors.	
		18.	Ability to define the stock code with respect to stock type such as Tablet, Capsules etc. Some medicines could come in both stock types such as Tablet and Syrups.	
		19.	Overall, Stock Code, HSN Code, Stock short description, Stock Type, Stock Composition has to be captured. And with this information the brands have to be linked and thereby the system should generate the code based on brands.	
		20.	Ability to Capture the Minimum Level Stock, Re-order Level and Maximum Level Stock.	
Stock Audit		21.	Ability to check the stock on any given date.	
		22.	Ability to search for a stock on Stock code, Composition or any relevant fields.	
		23.	Ability to check on the stock level on any given back date. For instance if I wanted to check on the stock level as on 1 st June 2017 then the system should throw results.	
		24.	Ability to enter the opening balance of the stock at the time of software implementation.	
	Vendor Master	25.	Ability for the system to generate multiple vendors.	
		26.	<p>Ability to capture all basic information with respect to vendors. The following is the information:</p> <p>Vendor Name Head Office Address with Pincode GST Branch information if any and its GST if in different state Bank Account information such as Name of the Bank, IFS Code, Account Number, Branch List of medicines the vendor supplies</p>	

		27.	Ability to change the list of medicines the vendor can supply at any future date.	
		28.	The list of medicines that the vendor supplies should be populated automatically when the respective vendor is clicked in the purchase order.	If the user tries to order any other medicines out of scope then alert the super admin.
		29.	The credit period number of days has to be captured in this Master. This is the credit period captured Vendor based. This value could be defaulted at each purchase order where user can also overwrite.	
	Tax Master	30.	Ability to feed in the GST Rates such as NIL, 5%, 12% and 18%.	
		31.	Ability to capture tax rates can be captured based on the Brand Code.	
		32.	Ability to default the captured rates in the purchase stock and the in IP/OP stock. The user can also overwrite the rates but it should throw an alert.	
		33.	If the tax rates are not defined in this module then the user can enter the rates in the Purchase stock and in the IP/OP stock.	
		34.	Ability to set the financial year in the tax master	
		35.	Ability to close all the statutory rates on a monthly basis. Ability to have the following options: Yearly Half Yearly Quarterly Monthly It should default to GST to monthly basis.	Report on Most selling stocks based on Brand name and stock composition. Custom reports to be enabled.
		36.	Ability to capture additional tax. The additional tax can be calculated on the Gross Value, Net Value or on the GST value. This has to be set in this level.	
	Units Master	37.	The units have to be defined in the system. The units are the following Tablets – Tablets Cream – Box / Tube Syrups – Bottles Injections – Vial or Ampoule	
Purchase Order		38.	Ability to generate a Purchase Order against a Vendor	
		39.	Ability for the system to generate a unique Purchase Order code. The format has to be in PO/VENDOR_CODE/YEAR/MONTH/SEQUENCE_NUMBER.	

		40.	<p>Ability for the system to generate a purchase order which contains list of medicines required. This should have the following information:</p> <p>Serial Number Stock code with brand Stock composition Quantity</p> <p>The stock code with brand code is a drop-down field which has to be populated from the vendor master. The detailed fields is mentioned in the excel sheet.</p>	
		41.	Ability to draft the purchase order and save the purchase order for further edit.	Check with Mastan on how the PO is sent in the current system
		42.	Ability to save the purchase order and send SMS, Email to the respective vendor.	
		43.	Ability to edit a Purchase order. User can only edit a purchase order before being sent to the vendor.	
		44.	Ability to download a purchase order and take a printout. Company logo, address, D/L Number, CIN, PAN, GST number has to populated in all the printouts from the system.	
		45.	Ability to mark a purchase order of review. Review is sort of an approval from Superior.	Super admin and admin
Purchase order Confirmation		46.	Ability for the system to confirm the purchase order received from the vendor.	<p>If the enters tax rates in the PO confirmation or tries to change the tax rates in the PO confirmation, trigger an alert to the Super admin and to Auditor.</p> <p>Changes made update in the tax master as well. Reverse – update function f(update) enable in the stock level. Access only to Mastan / Pharma Admin</p>
		47.	Ability for the system take add stock against a purchase order.	
		48.	Ability to capture all the necessary fields mentioned in the Excel sheet.	
		49.	Ability to generate the barcode. The Barcode will a combination of Batch Code, Brand code and Quantity. This is to facilitate First in First out concept in issuing medicine to the patient.	
		50.	All the relevant GST information has to be captured.	
		51.	The barcode will be the key for the first in and first out. (Barcodes may not be available for all the medicines. This might need to be checked.)	

		52.	Once the Purchase order is confirmed against a particular vendor then on saving the record, the system should send an confirmation email to the vendor. The confirmation email should have the list of all the products entered.	Check with Mastan on the current process
		53.	Ability to maintain all the stock entered via the purchase order confirmation.	
Direct Stock Add		54.	Ability to capture all the fields mentioned in the purchase order, but this is adding the stock directly without any purchase order.	Only Mastan
		55.	Ability to add a direct stock against the vendor added in the vendor master.	
Outpatient Sale		56.	Ability to add a Patient details in the Out-Patient Module	
		57.	<p>The following information must be capture in the Out-Patient Sale</p> <div> <div> Name of the Patient DOB and this automatically captures the Age Gender (Male or Female) MR Number OP Number (optional) Email id Mobile Number Physician Name Bill Number Invoice Date </div> <div> All these will be optional for OP sales except maybe ? MR number. </div> </div>	Name, village, mobile number Any multiple fields to fetch the data..
		58.	Once the above details are entered then the user must enter the list of products the patient wants to buy	
		59.	All the relevant information mentioned in the Excel sheet has to be captured.	
		60.	Ability to issue medicines against a Patient	
		61.	Ability to add medicines on first in and first out basis	
		62.	If a medicine is received from two different vendors having two different batch code and same margin then the system should prompt the user to select the medicine with nearest expiry date	
		63.	If the patient is UCIL/Insurance then the medicines with highest margins (MRP – Purchase) has to be selected. This alert has to be given to the user based on the availability of Stock.	Aarogyasri will have cheaper Net Price / Purchase Price. EHS is same as Aarogyasri.
		64.	The above condition has to be driven from the Masters and any modification has to be done in the masters	
		65.	The user can also overwrite this condition and continue to issue medicine based on availability. (Only a doctor can take this decision or lead pharmacist)	
		66.	Ability to generate the invoice	
		67.	Once the invoice is generated then the cashier should be able to receive the payment for it.	

		68.	Ability to cancel the invoice. Cancellation can only be done before receiving payments.	
		69.	Ability to deduct the stock only when the cashier marks the payment entry. Payment entry can be in the form Cash/Card/Money Receipt. (Discount upto 100% possible by super admin)	Frequent visitors should be alerted and discounts rates can be fixed to these customers. Check condition
		70.	Ability to edit an invoice. The user can add delete or modify an existing invoice and this is only before payments. The user cannot edit an invoice if the cashier has received payment for it. (Any edited invoice has to come in notification bin to admin / super admin)	
		71.	Ability to generate the invoice number automatically in the format P/INV/OP/YEAR/MONTH/ SEQUENCE_NUMBER. For IP, it is P/INV/IP/YEAR/MONTH/ SEQUENCE_NUMBER.	
		72.	Ability for the system to calculate additional tax. The additional tax application should come from the master. The additional tax can be added on the Gross value or on the GST or on the total (Net Value).	
In Patient Sale		73.	Ability to add an In-Patient detail in the In-Patient Module	
		74.	An Out Patient can also be an In Patient and vice versa. If the information is there in Out Patient the same has to be populated in this module. The search can be based on the Mobile Number or combination of any two fields such as Name and Mobile Number or Name and DOB etc.	
		75.	<p>The following information must be capture in the In-Patient Sale</p> <div> <div> IP Number Name of the Patient DOB and this automatically captures the Age Gender (Male or Female) Guardian Name and Mobile Number (Optional) </div> } Autopopulate on entering the MR No </div> <p>MR Number OP Number (optional) Email id (Optional) Mobile Number (Autopopulate from MR number unless otherwise different) Physician Name Bill Number Invoice Date</p>	
		76.	Once the above details are entered then the user must enter the list of products the patient wants to buy	
		77.	All the relevant information mentioned in the Excel sheet has to be captured.	
		78.	Ability to issue medicines against a Patient	
		79.	Ability to add medicines on first in and first out basis	

		80.	If a medicine is received from two different vendors having two different batch code and same margin then the system should prompt the user to select the medicine with nearest expiry date	
		81.	If the patient is UCIL/Insurance/Aarogyasri then the medicines with highest margins (MRP – Purchase) has to be selected. This alert has to be given to the user based on the availability of Stock.	
		82.	The above condition has to be driven from the Masters and any modification has to be done in the masters	
		83.	The user can also overwrite this condition and continue to issue medicine based on availability. (Only doctors and Pharmacy head can overwrite the condition)	
		84.	Ability to generate the invoice	
		85.	Once the invoice is generated then the cashier should be able to receive the payment for it.	
		86.	Ability to cancel the invoice. Cancellation can only be done before receiving payments.	
		87.	Ability to deduct the stock only when the cashier marks the payment entry. Payment entry can be in the form Cash/Card/Money Receipt.	
		88.	Ability to edit an invoice. The user can add delete or modify an existing invoice and this is only before payments. The user cannot edit an invoice if the cashier has received payment for it.	
		89.	Ability to generate the invoice number automatically in the format P/INV/OP/YEAR/MONTH/ SEQUENCE_NUMBER. For IP, it is P/INV/IP/YEAR/MONTH/ SEQUENCE_NUMBER.	
		90.	Ability to generate the list of medicines issued to a patient based on the IP Number	
Out Patient Returns		91.	Ability to return stock back to the pharmacy.	
		92.	Ability to return the stock in the form of tablets or any units. For example, if the patient had purchased a strip containing 10 tablets then the patient can return 4 tablets.	
		93.	All the tax calculations have to be done based on the quantity of the return.	
		94.	Ability to generate the refund process. If the patient gives back the medicine then the cashier has to give cash to the equivalent amount.	
		95.	Ability to generate the Return invoice in the following manner P/RETURN/OP/YEAR/MONTH/SEQUENCE_NUMBER. For IP, it will be P/RETURN/IP/YEAR/MONTH/SEQUENCE_NUMBER.	
		96.	For a patient with consistent purchase history then there will be lot of transaction. The transaction has to list in chronological order with latest on top.	<p>? Opening a tab i.e., monthly payment for some patients</p> <p>Payment on monthly or fortnight basis. Check</p>

		97.	The user has to be click the appropriate invoice and select the row and hit return. Ability to select multiple rows and change the quantity.	
		98.	Once the above transaction is saved, the system should calculate the Refund amount and save to process the transaction. On saving the system generate the Return Invoice Number.	
		99.	The cashier will refund the amount based on the invoice.	
Cashier		100.	Ability to receive cash or card against a particular OP Sale or IP Sale.	
		101.	If it is a cash payment, then the cashier marks as a cash payment and generates the receipt.	
		102.	If it is a card payment then all the relevant information such as Name of the Card Holder, Last four digits in the Card.	Part payments to be enabled
		103.	The following is the list of details that has to be entered in the Card Section MasterCard Visa Maestro Rupay Amex Diners Debit Card	Fetch Data from card by swiping the card. Need to take approval from HDFC.
		104.	Ability to capture the swiping machine information.	
		105.	Ability to capture / generate the Money Receipt.	
		106.	Money receipt is generated when the patient decides to pay at later stages. This is applicable for both OP Sale and IP Sale.	Invoice pending for payments should be alerted to Super Admin. On real time basis.
		107.	Ability to perform refunds against be particular return invoice	
		108.	Ability to issue only cash for refunds.	
Reports		109.	Ability to generate Purchase Order Report Vendor Wise, Drug Wise, Stock code wise, Brand code wise.	
		110.	Ability to throw the list of medicines nearing expiry. 30 days from the expiry date entered at the time of receiving stock.	Auto alert to the Physicians.
		111.	Ability to generate the Cash Flows from In Patient, Out Patient and both.	
		112.	Ability to generate the list of medicines purchased by an IN Patient based on the IP Number. This includes Sales and Returns as well.	
		113.	Ability to generate the list of medicines purchased by an Out Patient based on the MR Number. The list should be in the chronological order with latest first and oldest next.	
		114.	Ability to throw reports based on the user wise sale reports. The sale report consists of both the invoice paid and invoice generated.	
		115.	Ability to generate reports on the tax calculation. Purchase GST tax	

		116.	Ability to generate reports on the Tax Payable (Tax on Sales)	
		117.	Ability to generate reports on the tax calculations month wise	
		118.	Ability to generate the pricelist product wise or for the entire inventory	<p>Total amount should have been recovered based on Sales. And what is the actual collected amount based on Cashier payments. Any difference should be alerted.</p> <p>Report on MR Number based discount.</p> <p>Report on card payment collection amount. If is not matching throw an alert.</p> <p>Cashier settlement to the next user. If next doesn't okays then alert the super admin. (meaning if there is any difference)</p>
Chat & Email Integration		119.	Ability to send a Direct Message to any other user within the same organization	
		120.	Ability to create a channel and invite all the necessary users to the channel. Channel is nothing but a group.	
		121.	Ability to delete a chat or delete a channel by the authorized people. Individual users can opt out of the channel.	
		122.	Notice Emails to all the necessary people with the channel or users. Kind of announcement to the users.	
		123.	Ability to attached the necessary files in the notice emails	
		124.	Ability to add emoticons in the channel	
Calendar		125.	Ability to utilize the calendar function	
		126.	Ability to enter the Meeting Subject, It could be with vendor meeting or internal meeting or anything. Respective people should get an alert	
		127.	Ability to capture the start date and end date	
		128.	Ability to capture the location, reminders, tags, duration, invite users to the meetings.	
Notes		129.	Ability for the user to create notes. The user can create a note, edit a note and delete some notes.	
		130.	Ability to have multiple color options to notes like the sticky notes.	

		131.	Ability to capture the followers to a particular note.	
		132.	Ability to capture the internal note	