



# Scope Document for

## HalloDoc Platform

### My schedule

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# Scope Document

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## 1. Introduction

The platform will offer online Doctors consultation and Diagnostics services. The HalloDoc platform, also known as a health-care website, serves as a valuable tool for doctors to enhance patient care and streamline their work processes. It offers a user-friendly interface that simplifies various tasks for doctors. They can conveniently access patient records, efficiently manage appointments, and securely communicate with their patients. Additionally, patients can utilize the website to request care for themselves or on behalf of others. The platform accommodates three types of users: Admin, Physician, and Patients. The Admin user has comprehensive access to patient and physician records, enabling them to review patient history, manage cases, and exercise control over requests by canceling or blocking them when necessary.

### Platform login page

#### Description:

This page will appear when user lands on the platform. This page will have a banner at left side and login section at right side.

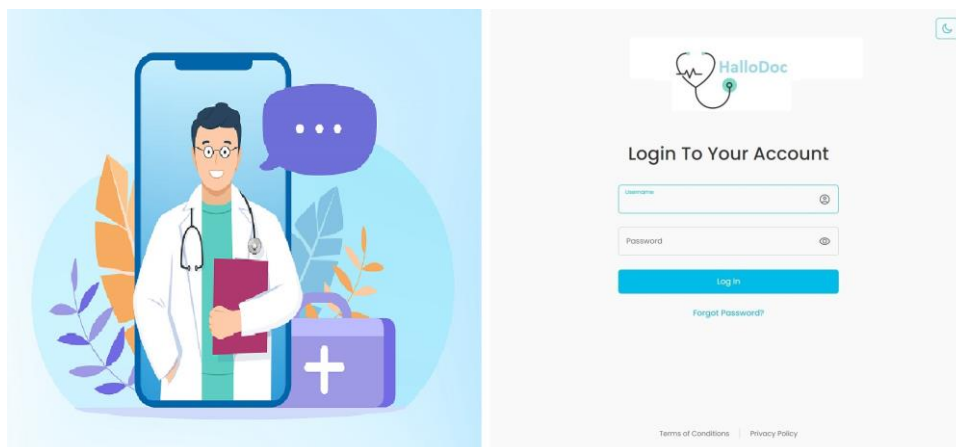


Fig1. Platform login page

#### Description:

User can login to platform using their email address and password.

#### Features:

#	Feature	Type	Description
	Email address	Input	User will need to enter his email address in this text box.
	Password	Input	User will need to enter his password in this text box.

	Login	Button	After entering correct email address and password, clicking on this button will allow user to sign in to the platform.
	Forgot password	Link	If a user forgets his or her password, he or she must select "Forgot password?"
	Footer links	Link	It will display links to pages such as Terms of condition and privacy policy.

## Forgot Password

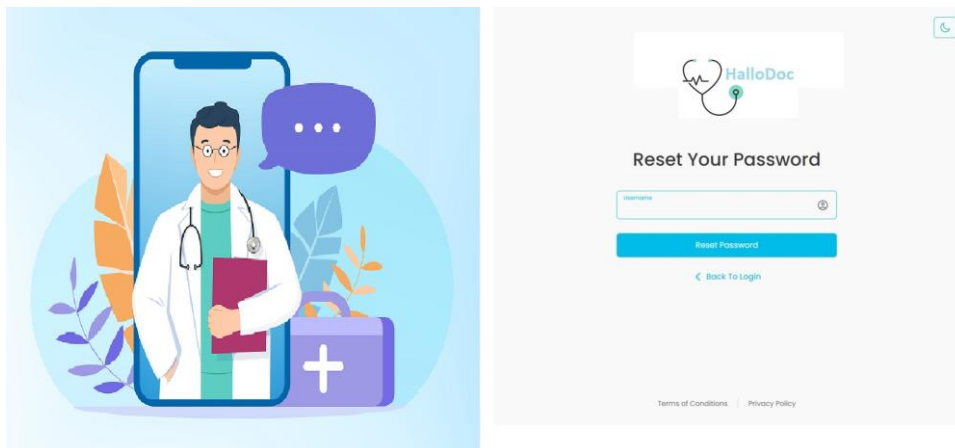


Fig2. Forgot Password

### Description:

Users who have forgotten their password may request it by entering their email address. System will check their email address existence, if it exists then reset password link will be sent to their email address. Reset password link will expire in 24 hours.

### Features:

#	Feature	Type	Description
	Email address	Input	User will need to enter his email address in this text box.
	Reset password	Button	Clicking on this button, system will check if entered email address exists or not in platform. If it exists then Reset Password link will be sent to this email address.

	Back to Login	Link	Clicking on this link will redirect user back to login page.
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## Reset Password

### Description:

User will receive a link for this page via email when requested through forgot password page. When Page is loaded Link will be checked for expiration.

### Features:

#	Feature	Type	Description
	Password	Input	User will need to enter new password.
	Confirm Password	Input	User will need to confirm the new password
	Reset	Button	Clicking on this button, User can reset their password.

## 2. Admin Dashboard:

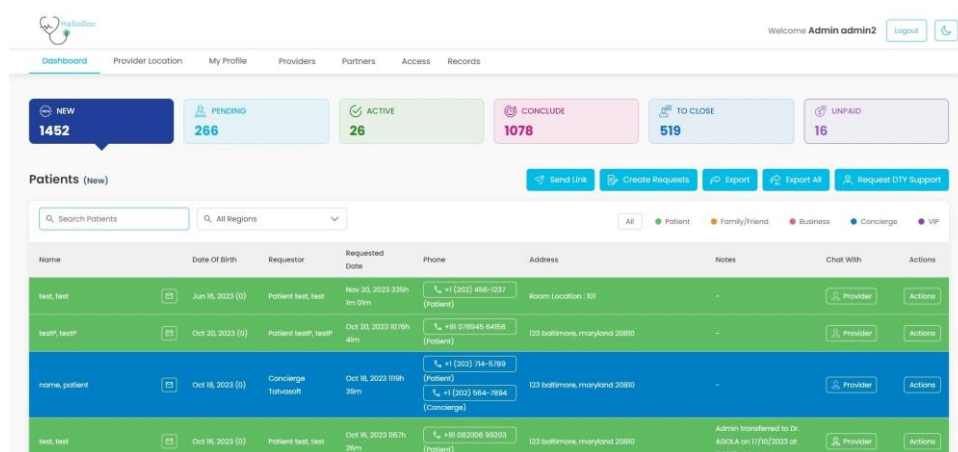


Fig3. Admin Dashboard

### Description:

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Once the login is successfully completed, the Admin will be automatically directed to the platform's landing page, which will showcase the patient requests. The Admin will have the ability to filter the requests based on their request type and search for specific requests using the patient's name or the name of the requestor. On desktop devices, the requests can be viewed in a grid format, while on mobile devices, a card view will be provided for optimal display.

#### Features:

#	Feature	Type	Description
	NEW	Button	Clicking on this button, Admin can view all the newly created patient requests.
	Pending	Button	Clicking on this button, Admin can view all patient requests which are accepted by provider and patients who do not have accepted the agreement.
	Active	Button	Clicking on this button, Admin can view all requests for which patients have accepted the agreement or providers has choose House-call for providing the care.
	Conclude	Button	Clicking on this button, Admin can view all requests for which providers have completed their service from their side.
	To close	Button	Clicking on this button, Admin can view all requests which are ready to close.
	Unpaid	Button	Clicking on this button, Admin can view all requests which are unpaid by patients.
	Send Link	Button	Clicking on this button, Admin can send link to patients for creating a request via email and SMS.
	Create Request	Button	Clicking on this button, Admin can create a request on behalf of the patient.
	Export	Button	Clicking on this button, Admin can export an Excel file of the patient requests of current request state and current page or filtered requests.
	Export All	Button	Clicking on this button, Admin can export an Excel file of all the patient requests.
	Search Patients	Input	Admin can search patients by patient name, requestor name

## Admin dashboard in New state:



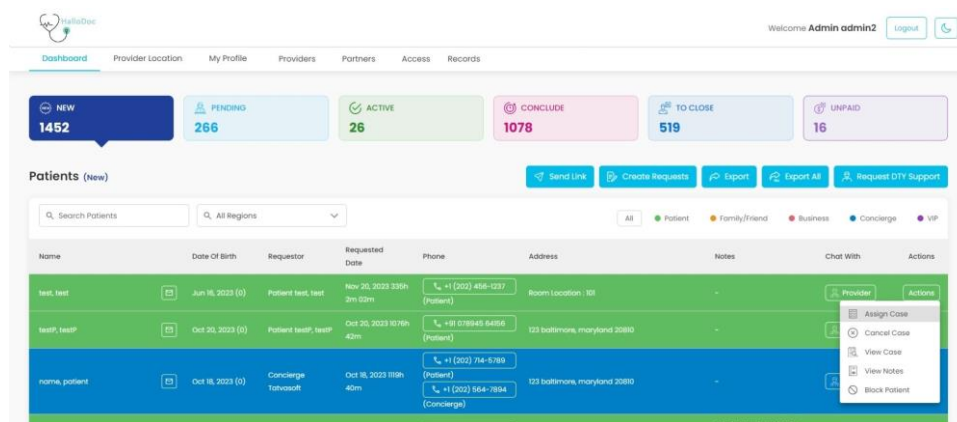


Fig4. Admin dashboard in New state

#### Description:

The landing page will exhibit all recently created requests. Initially, when patients generate a request, those requests will appear in the "New" state on the Dashboard.

#### Admin dashboard in pending state:

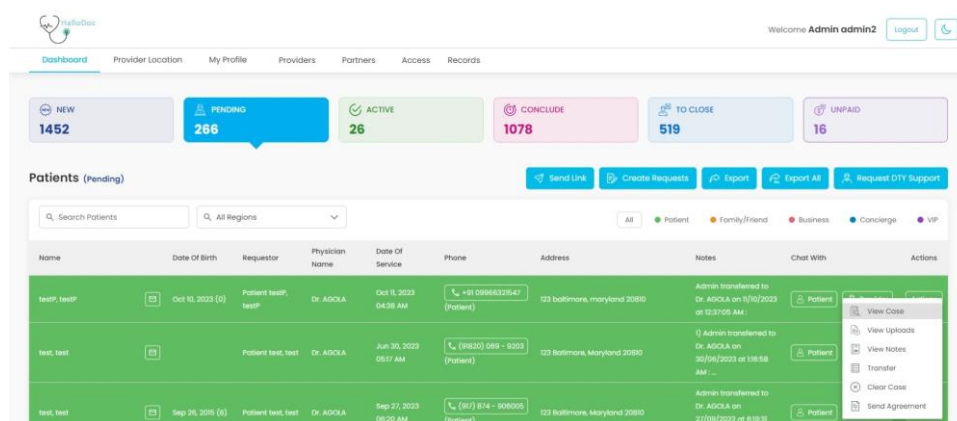


Fig5. Admin dashboard in pending state

#### Description:

The page will show patient requests that have been accepted by providers or are still pending the acceptance of the service agreement by patients. When providers accept a patient request, they are required to send an agreement video link via email and SMS to the patient's email address and phone number. Once the patient accepts the agreement, their request will transition from the "Pending" state to the "Active" state.

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## Admin dashboard in Active state:

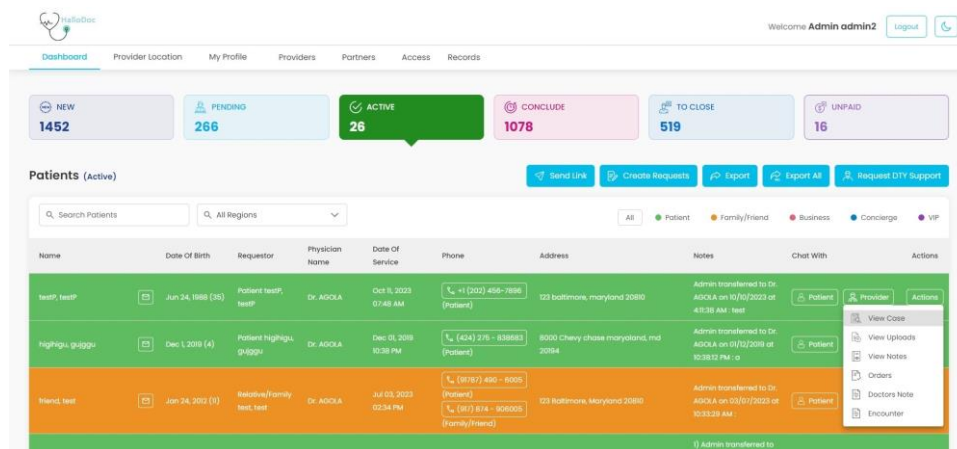


Fig6. Admin dashboard in Active state

This page will display patient requests for which patients have accepted the service agreement and provider is giving service to the patient. Once the request is transferred into active state providers can start medical care for the patients.

## Admin dashboard in Conclude state:

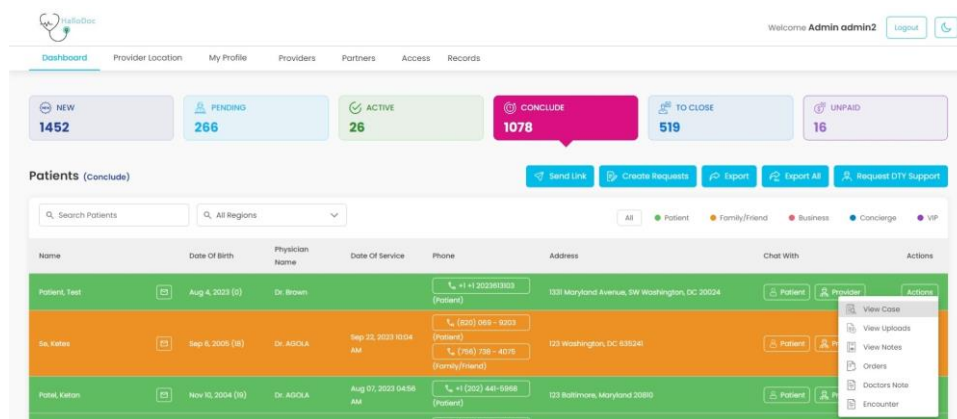


Fig7. Admin dashboard in Conclude state

This page will display patient requests for which medical is completed by the provider. Once the request is transferred into conclude state providers can finally conclude care for the patients.

## Admin dashboard in To Close state:

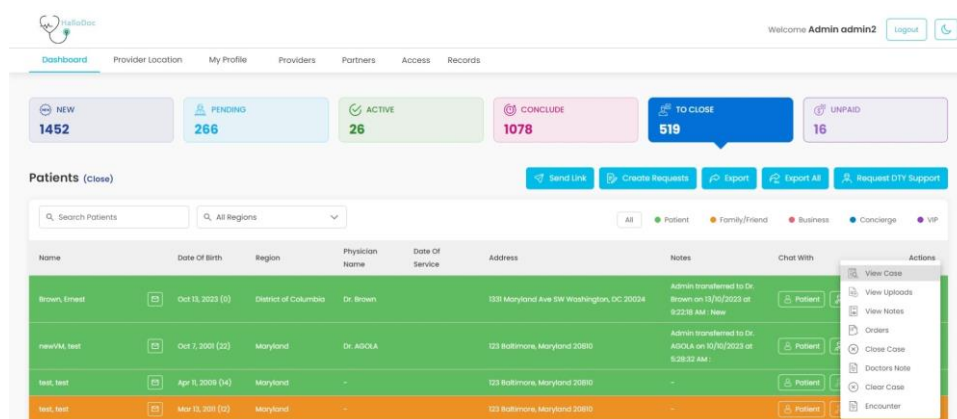


Fig8. Admin dashboard in To Close state

This page will display all patient requests which are concluded by providers or cancelled by the admin. Admin can close the case.

Admin dashboard in Unpaid state:



Welcome Admin admin2



Dashboard   Provider Location   My Profile   Providers   Partners   Access   Records

 NEW  
1452

 PENDING  
266

 ACTIVE  
26

 CONCLUDE  
1078

 TO CLOSE  
519

 UNPAID  
16

### Patients (Unpaid)

Send Link   Create Requests   Export   Export All   Request DTY Support

Search Patients

All Regions

All   Patient   Family/Friend   Business   Concierge   VIP

Name	Physician Name	Date Of Service	Phone	Address	Chat With	Actions
testAdmin, testAdmin	Dr. AGOLA	Sep 27, 2023 09:39 AM	(202) 456 - 9874 (Patient)	123 baltimore, maryland 20810	Patient   Provider	Actions
Check-, Phone	-		(756) 738 - 4075 (Patient)	123 Baltimore, Maryland 456321	Patient   Provider	View Case View Uploads View Notes
Patel, Ketan	-	Aug 04, 2023 12:00 PM	+1 (203) 445-6987 (Patient)	123 Baltimore, Maryland 20810	Patient   Provider	Actions
Patel, Ketan	-	Aug 04, 2023 12:02 PM	+1 (202) 556-9856 (Patient)	123 Baltimore, Maryland 20810	Patient   Provider	Actions

Fig9. Admin dashboard in Unpaid state

This page will display all closed patient requests for which patients have not paid the fees.

View case:

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[Dashboard](#)[Provider Location](#)[My Profile](#)[Chat\(9\)](#)[Providers](#)[Partners](#)[Access](#)[Halo](#)[Records](#)

## New Request Patient

[< Back](#)

### Patient Information

Confirmation Number

MD120523PASA0002

Patient Notes

stomach pain

First Name

sahil

Last Name

patel

Date of Birth

28/06/1991



(201) 222-2222



Email

sahil.patel@gmail.com

### Location Information

Region

Maryland

Business Name/Address

Maryland Maryland, Maryland 2121



Room #

[Assign](#)[View Notes](#)[Cancel](#)

Fig10. View case

**Description:**it us at: [www.tatvasoft.com](http://www.tatvasoft.com)E-mail us at: [business@tatvasoft.com](mailto:business@tatvasoft.com)

This page will display all the details of patient request. Admin can view Patient's personal information on this page.

#### Features:

#	Feature	Type	Description
	Confirmation Number	Label	It will show the confirmation number for patient request which was created at the time of submitting a request. It is created by the patient's region and datetime of submit a request. It will be unique for each patient. The first 2 characters will represent the region abbreviation, then next 4 numbers will represent the date of created date, then next 2 characters will represent first 2 characters of last-name, then next 2 characters will represent first 2 characters of first-name, then next 4 digits is representing how many requests are done in same day.
	Patient Notes	Textbox	It will show the patient notes which are added by patient at the time of creating a request.
	First Name	Textbox	It will show the patient's first name.
	Last Name	Textbox	It will show the patient's last name.
	Date of birth	Textbox	It will show the patient's date of birth.
	Phone Number	Textbox	It will show the patient's phone number.
	Email	Textbox	It will show the patient's email.

	Edit	Button	Clicking on this button, admin will be able to edit Patient information.
	Region	Textbox	It will show the patient's region.
	Business Name/Address	Textbox	It will show the patient's address.
	Room	Textbox	It will show the patient's address.
	Assign	Button	This button will only be visible in New state cases. Clicking on this button, admin can assign that request to the provider.
	View Note	Button	Clicking on this button, admin will redirect to the View Notes page of that request.
	Cancel	Button	Clicking on this button, admin can cancel the request and that request will be moved into "ToClose"
	Back	Button	Clicking on this button, admin will redirect to the previous page

View Notes:

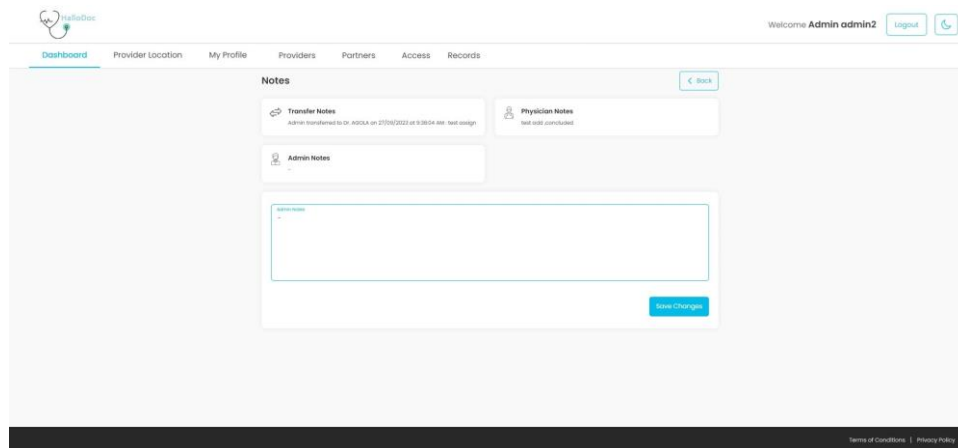


Fig11. View Notes

#### Description:

The page will present a variety of notes associated with the patient request. It includes seven note types: Patient Notes, Transfer Notes, Physician Notes, Admin Notes, Admin Cancellation Notes (shown when the admin cancels the request), Physician Cancellation Notes (shown when the provider cancels the request), and Patient Cancellation Notes (shown when the patient cancels the request).

#### Features:

#	Feature	Type	Description
	Transfer Notes	Textbox	It will show the transfer notes of the request with the date and time. When an admin has transferred to which provider on which date.
	Physician Notes	Textbox	It will show the notes of the request provided by physician.
	Admin Notes	Textbox	It will show the notes of the request provided by admin
	Additional Notes	Input	Admin can add any additional notes using this field.
	Admin Cancellation Notes	Textbox	This section will be shown if there are any admin cancellation notes. It will show the reasons for canceling the request by admin.
	Patient Cancellation Notes	Textbox	This section will show if there are any patient cancellation notes. It will show the reasons for cancelling the request by patient.



	Save changes	Button	Clicking on this button, admin notes will be saved in database.
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## Cancel case:

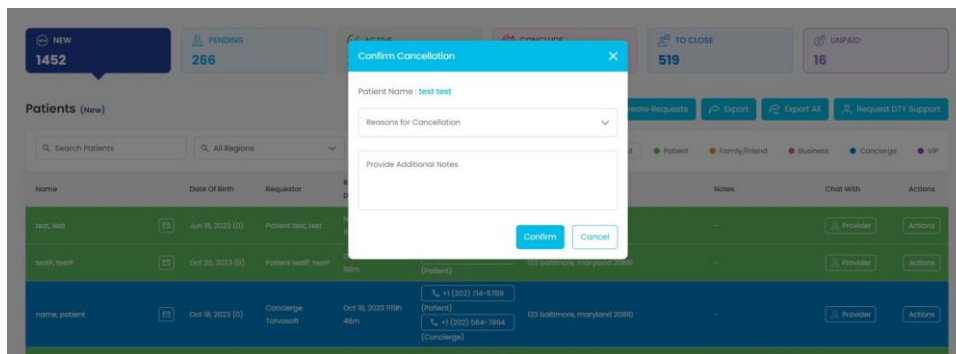


Fig12. Cancel Case pop-up

### Description:

This pop-up will open when admin will click on “Cancel case” link from Actions menu. Admin can cancel the request using this pop-up.

### Features:

#	Feature	Type	Description
	Patient Name	Label	It will display the name of the patient.
	Reasons for cancellation	Drop-down	It will display the reasons for cancellations.
	Provide Additional notes	Textbox	Admin can provide some additional notes for cancellation.

	Confirm	Button	Clicking on this button, admin will confirm to cancel the request.
	Cancel	Button	Clicking on this button, admin can cancel the cancellation of request.

## Assign case:

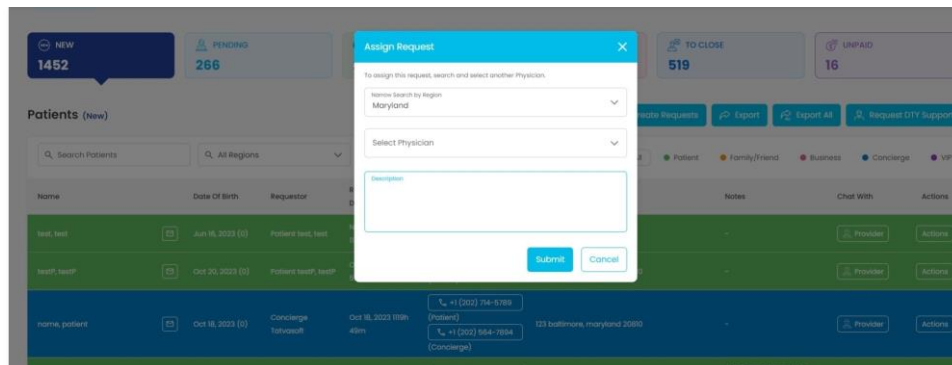


Fig13. Assign case

### Description:

This pop-up will open when admin clicks on “Assign case” link from Actions menu. Admin can assign the case to providers based on patient’s region using this pop-up.

### Features:

#	Feature	Type	Description
	Narrow search by region	Drop-down	It will display a list of states where this platform can provide the service.
	Select Physician	Drop-down	It will display a list of available providers based on the selected state.
	Description	Input	Admin can add additional description for patient request.
	Submit	Button	Clicking on this button, admin will confirm the assign request.
	Cancel	Button	Clicking on this button, admin will cancel the assign request.

## Block case pop-up:

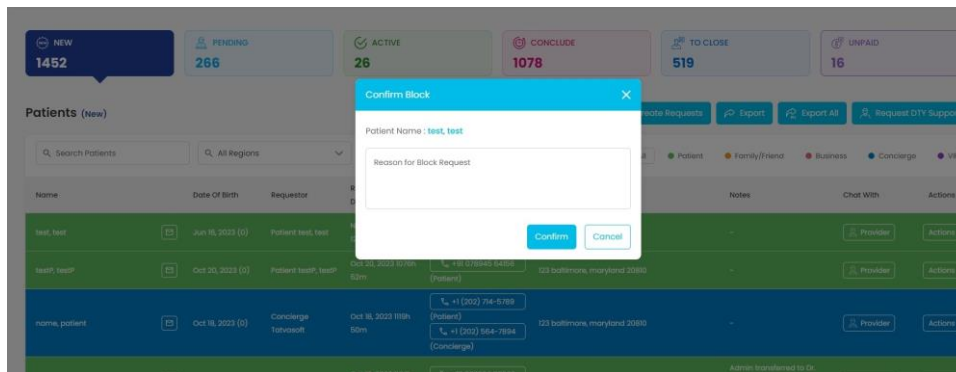


Fig14. Block case

#### Description:

This pop-up will open when admin clicks on “Block Case” link from Actions menu. From the new state, admin can block any case. All blocked cases can be seen in Block history page.

#### Features:

#	Feature	Type	Description
	Reason	Input	Admin needs to enter a reason for blocking the case.
	Confirm	Button	Clicking on this button, Admin can block the particular case.
	Cancel	Button	Clicking on this button will close the pop-up.

#### View Uploads:



Fig15. View Uploads

**Description:**

This page will display all the documents uploaded by patients and admin/providers in pending state.

## Features:

#	Feature	Type	Description
	Select File	File Upload	It will be used to select the file from the computer to upload.
	Upload	Button	To upload the selected file.
	Download All	Button	It will download all the selected files.
	Delete All	Button	It will delete all the selected files.
	Send Mail	Button	It will send the selected files via email. To patient's email address.

## Send Order:

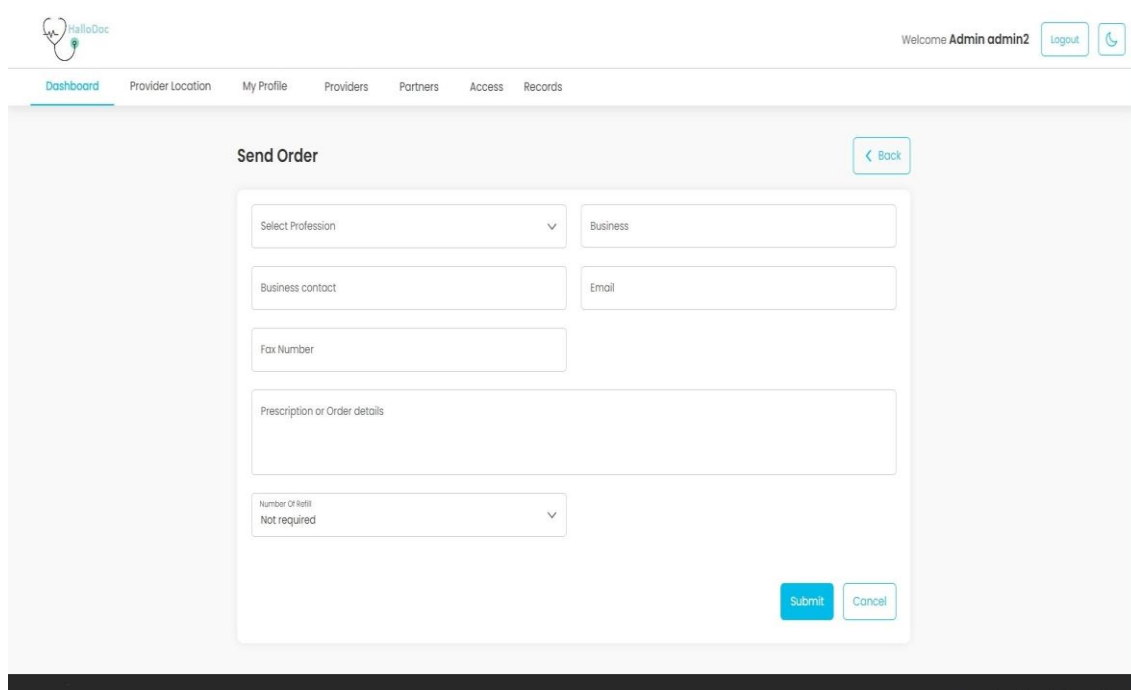


Fig16. Orders

### Description:

This page will open when admin/provider will click on “Orders” link from Actions menu. From the active, conclude and close state, admin/providers can send order to a registered business.

### Features:

#	Feature	Type	Description
	Select Profession	Dropdown	Admin/Provider needs to select a profession first to fetch related vendors.
	Business	Dropdown	Admin/Provider needs to select a registered business (Vendor) for selected profession.
	Business Contact	Input	It will show business contact of selected business. Admin/provider can edit business contact.
	Email	Input	It will show the email of selected business. Admin/provider can edit the email.
	Fax Number	Input	It will show the fax number of selected businesses. Admin/provider can edit the fax number.

	Prescription or Order Details	Input	Admin/Provider needs to enter order details to send order.
	Number of Refills	Dropdown	Admin/Provider can select how many times an order has to be refilled.
	Submit	Button	Clicking on this button, Admin/Provider can send the order to selected business.
	Cancel	Button	Clicking on this button, Admin/Provider will be redirected to Dashboard page.
	Back	Button	Clicking on this button, Admin/Provider will be redirected to Dashboard page.

## Transfer Request pop-up:

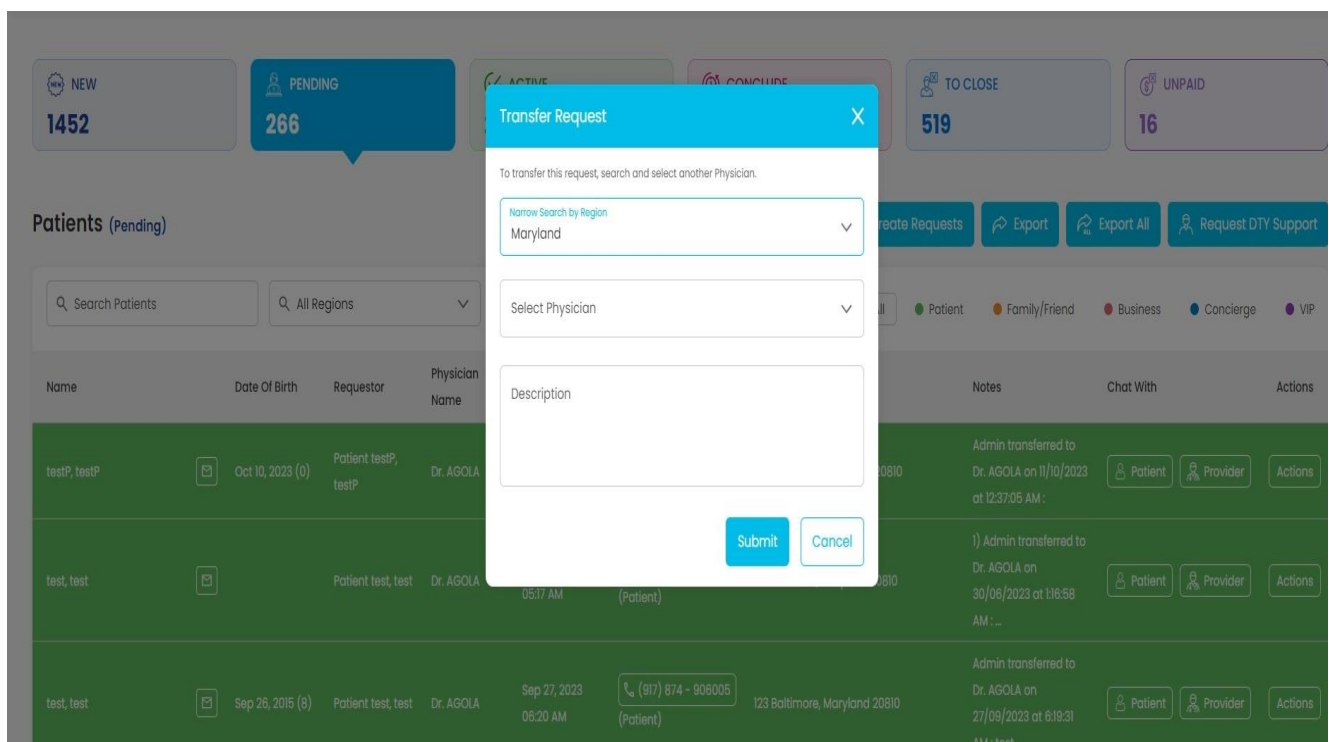


Fig17.Transfer

### Description:

This pop-up will open when admin clicks on “Transfer” link from Actions menu. From the pending state, admin can transfer assigned request to another physician.

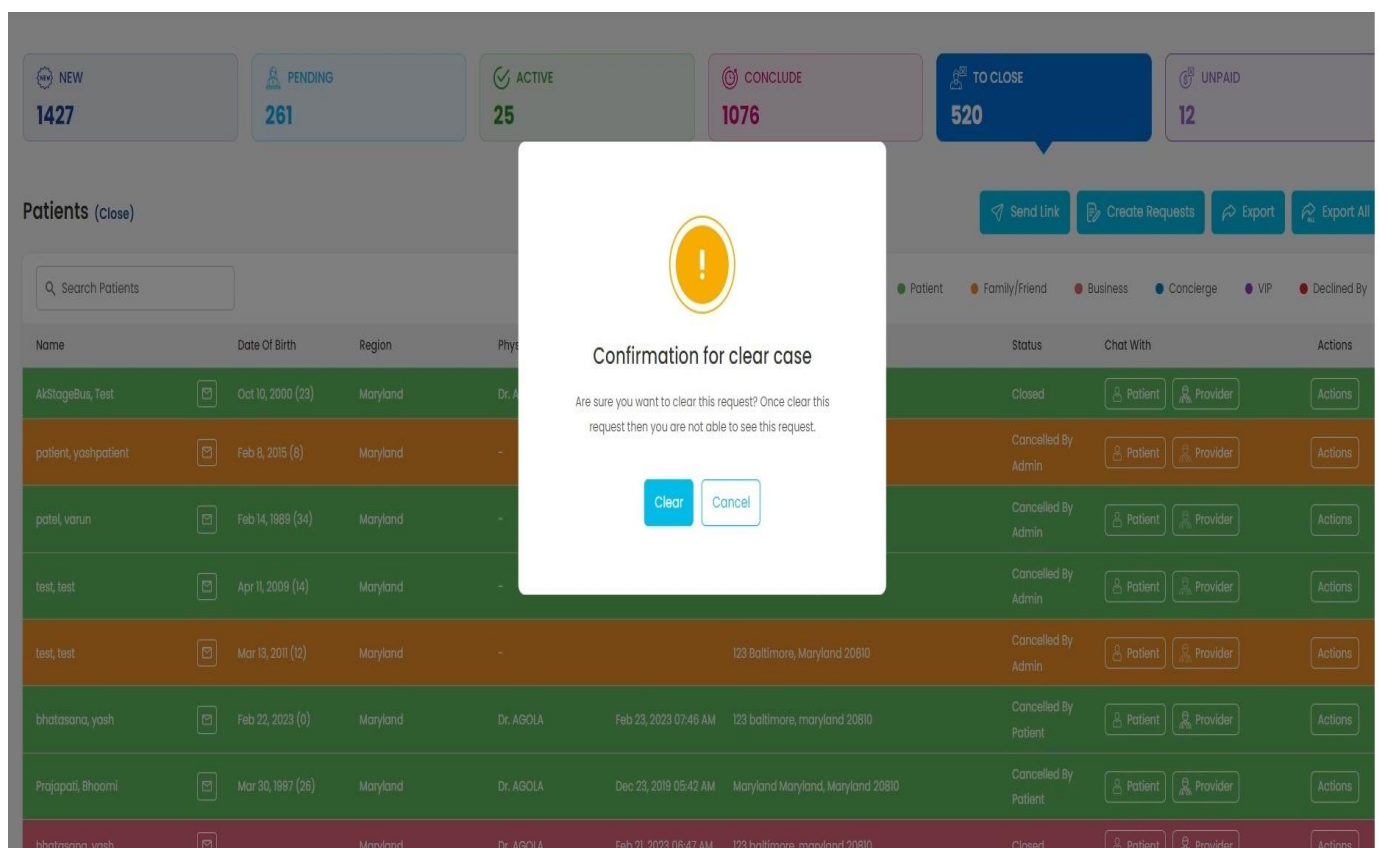
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E-mail us at: [business@tatvasoft.com](mailto:business@tatvasoft.com)

### Features:

#	Feature	Type	Description
	Region	Dropdown	Admin can search physician by selecting one region.
	Physician	Dropdown	Admin needs to select Physician to whom request is transferring.
	Description	Input	Admin can enter a note for transfer.
	Submit	Button	Clicking on this button, Admin can transfer requests from assigned physician to different physician.
	Cancel	Button	Clicking on this button will close this pop-up.

### Clear case pop-up:



The screenshot displays the TatvaSoft interface with a 'Confirmation for clear case' pop-up dialog. The background shows a dashboard with patient status filters (NEW, PENDING, ACTIVE, CONCLUDE, TO CLOSE, UNPAID) and a list of patients. The pop-up dialog has a yellow warning icon and asks: 'Confirmation for clear case. Are sure you want to clear this request? Once clear this request then you are not able to see this request.' with 'Clear' and 'Cancel' buttons.

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Fig18.Clear Case

**Description:**

This pop-up will open when admin clicks on “Clear case” link from Actions menu. From the pending and close state, admin can clear the case from the action grid.

**Features:**

#	Feature	Type	Description
	Clear	Button	Clicking on this button, Admin can clear the case.
	Cancel	Button	Clicking on this button will close the pop-up.

Send Agreement pop-up:



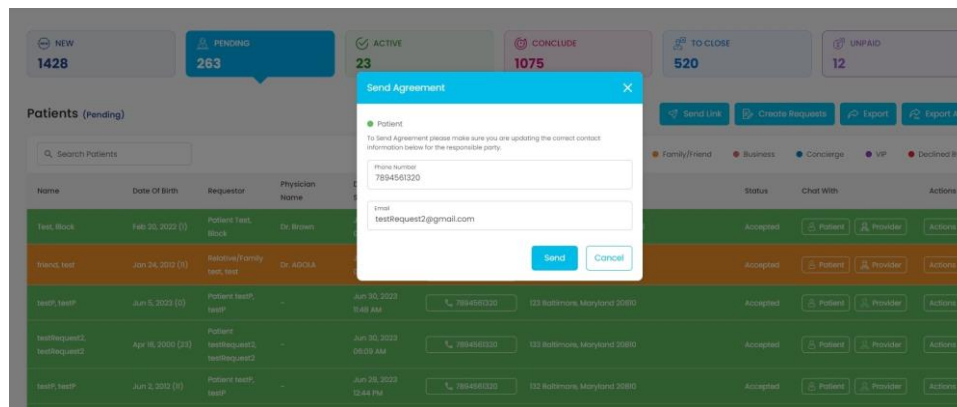


Fig19. Send Agreement pop-up

#### Description:

This pop-up will open when admin/provider will click on “Send agreement” link from Actions menu. From the pending state, providers need to send an agreement link to patients.

#### Features:

#	Feature	Type	Description
	Phone number	Input	It will show patient's phone number
	Email	Input	It will show patient's Email address
	Send	Button	Clicking on this button, admin can send agreement to the patient.
	Cancel	Button	Clicking on this button, send agreement pop-up will close.

## Close case:



Close Case

Patient Name

Test AkStageBus (MDI10419AKTE0075)

Create Invoice Through Quickbooks

Documents

	Upload Date ↑	Actions
 Medical Report Test AkStageBus 12-1-19.pdf	Jun 30, 2023	

Patient Information

First Name


Test

Last Name

AkStageBus


Date of Birth


10/10/2000



Phone Number

918200699203





Email

qatatva8786@gmail.com

Edit

Close Case

Fig20. Close case

### Description:

This page will open when the admin clicks on “Close case” link from Actions menu from To close state.

### Features:

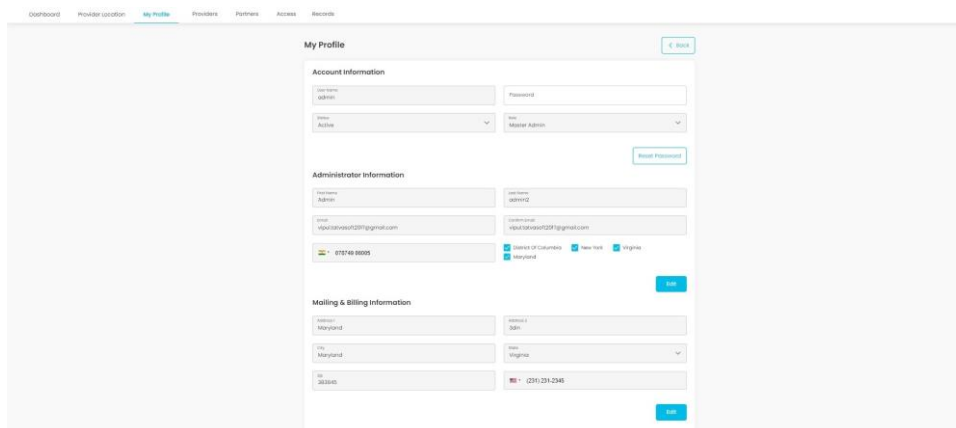
#	Feature	Type	Description
	Create Invoice through Quick books	Button	Clicking on this button, Admin can create invoice for service using Quick books. <b>Good to have feature</b>
	Action	Button	Clicking on this button, Admin can download a particular uploaded document.

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	Patient Name	Label	It will show full name of the patient
	First Name	Textbox	It will show first name of the patient
	Last Name	Textbox	It will show last name of the patient
	Date of birth	Textbox	It will show date of birth of the patient
	Phone number	Textbox	It will show phone number of the patient
	Email	Textbox	It will show email of the patient
	Edit	Button	Clicking on this button will enable the input field for Phone number and email, then it will show Save and cancel buttons instead of Edit and Close case buttons.  Admin can edit patient's phone-number and email using this button.
	Close Case	Button	Clicking on this button, admin can close the case and that request will be moved into "Unpaid"
	Save	Button	Clicking on this button will save changed phone number and email values, then it will show Edit and Close case buttons instead of Save and Cancel buttons, also it will disable the phone number and email fields.

## Profile menu:



**My Profile**

**Account Information**

User Name: admin Password: admin123

Role: Admin Master Admin

**Administrator Information**

User Name: admin123 Email: admin@tattvasoft.com

Address: 67440 8005

**Mailing & Billing Information**

Address: Maryland State: Maryland

City: Maryland Phone: (201) 234-2345

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Fig21. My Profile

**Description:**

This page will show a profile for logged in admin. Admin can edit their information from this page. For the admin's My Profile page, if the admin wants to edit his/her profile, he/she can directly edit the details in their profile without requiring any additional approval.

## Regions

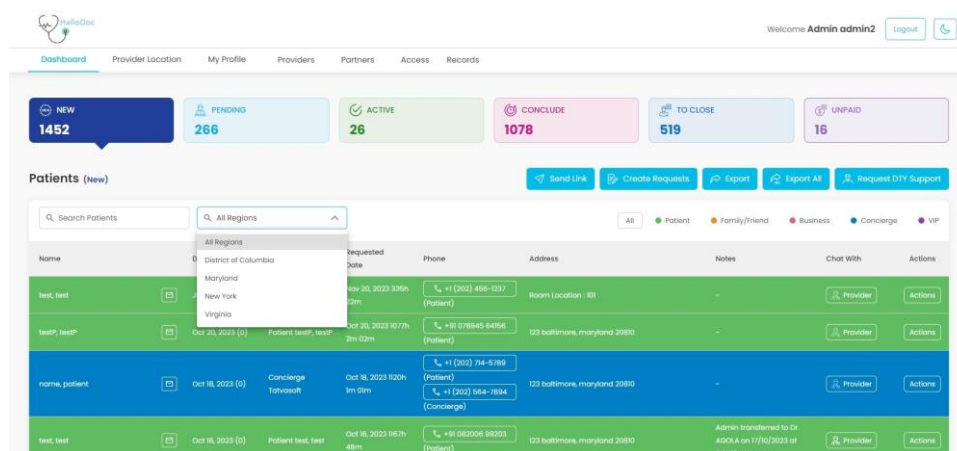


Fig22. Regions

#### Description:

In dashboard page Admin can filter requests using Region's filter. By default, requests of All regions will be fetched.

#### Request Support:

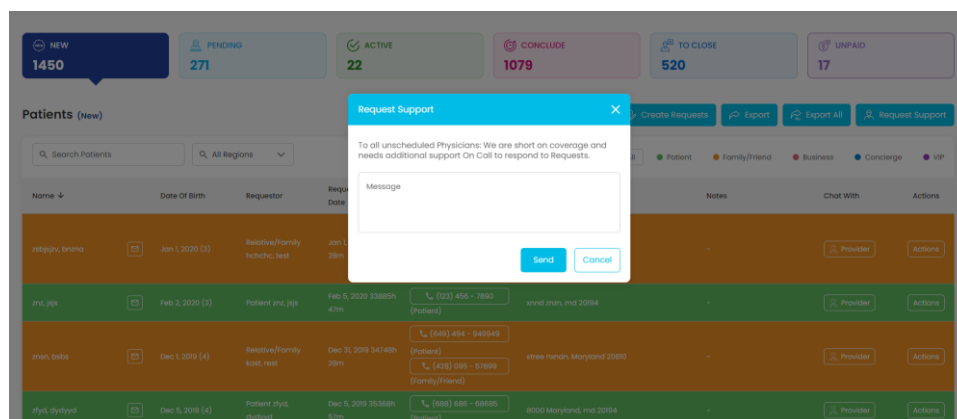


Fig23.Request Support

#### Description:

This popup is used for Sending message to all unscheduled Physicians.

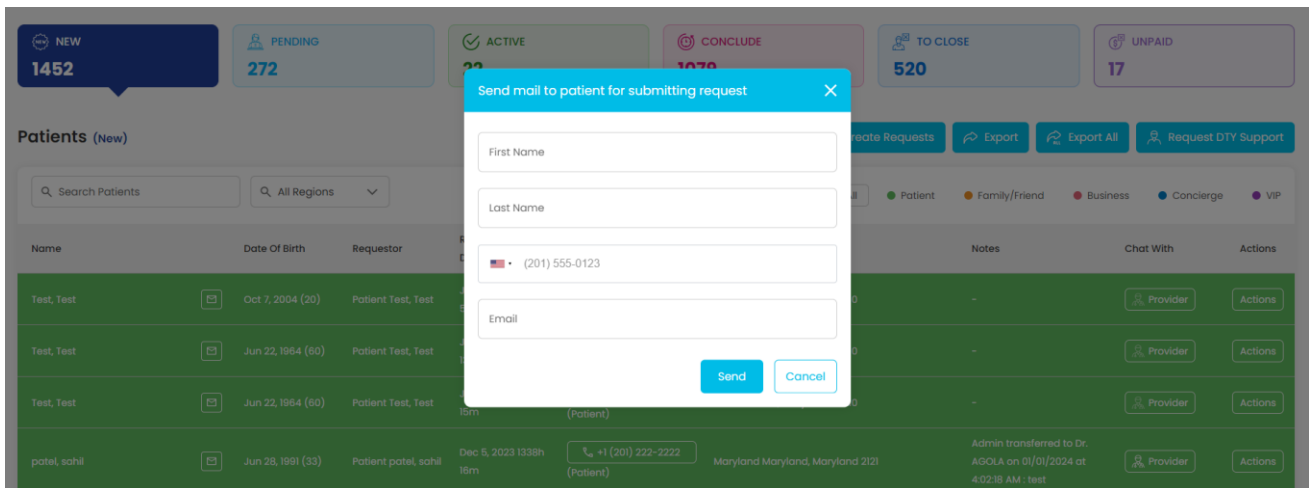
#### Features:

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E-mail us at: [business@tatvasoft.com](mailto:business@tatvasoft.com)

#	Feature	Type	Description
	Message	Textbox	Admin will need to enter a message that will be sent to all unscheduled physicians.
	Send	Button	Clicking on this button will send the entered message to all unscheduled physicians.
	Cancel	Button	Clicking on this button will close Request DTY Support modal.

## Send Link:



The screenshot displays a web application interface. At the top, there are status bars for 'NEW' (1452), 'PENDING' (272), 'ACTIVE' (23), 'CONCLUDE' (1078), 'TO CLOSE' (520), and 'UNPAID' (17). Below these is a 'Patients (New)' section with a search bar and a dropdown for 'All Regions'. A table lists patients with columns for Name, Date Of Birth, and Requestor. A modal popup titled 'Send mail to patient for submitting request' is open, containing input fields for First Name, Last Name, Phone (with a country code dropdown), and Email. 'Send' and 'Cancel' buttons are at the bottom of the modal.

### Description:

This popup is opened when clicked on Send link button in dashboard, it will be used to send link of Submit Request Screen page to the patient via email and SMS.

### Features:

#	Feature	Type	Description
	First name	Textbox	Admin/Provider must enter the first name of the patient.
	Last name	Textbox	Admin/Provider must enter the last name of the patient.
	Phone	Textbox	Admin/Provider must enter the phone number of the patient.
	Email	Textbox	Admin/Provider must enter the email of the patient
	Send	Button	By clicking on this button, A link for Submit request screen page of patient site is sent to patient via Email and SMS.

	Cancel	Button	By Clicking this button, the pop-up will close.
--	--------	--------	---

## Provider Menu:

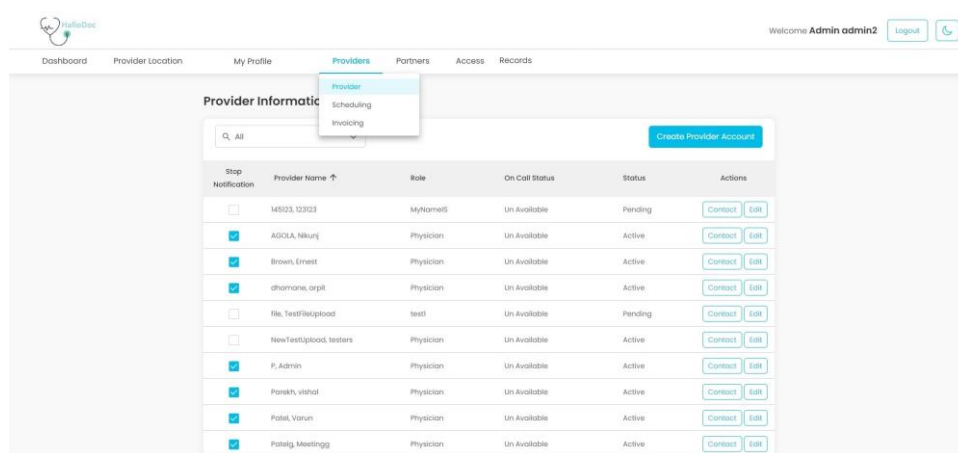


Fig24. Provider Menu

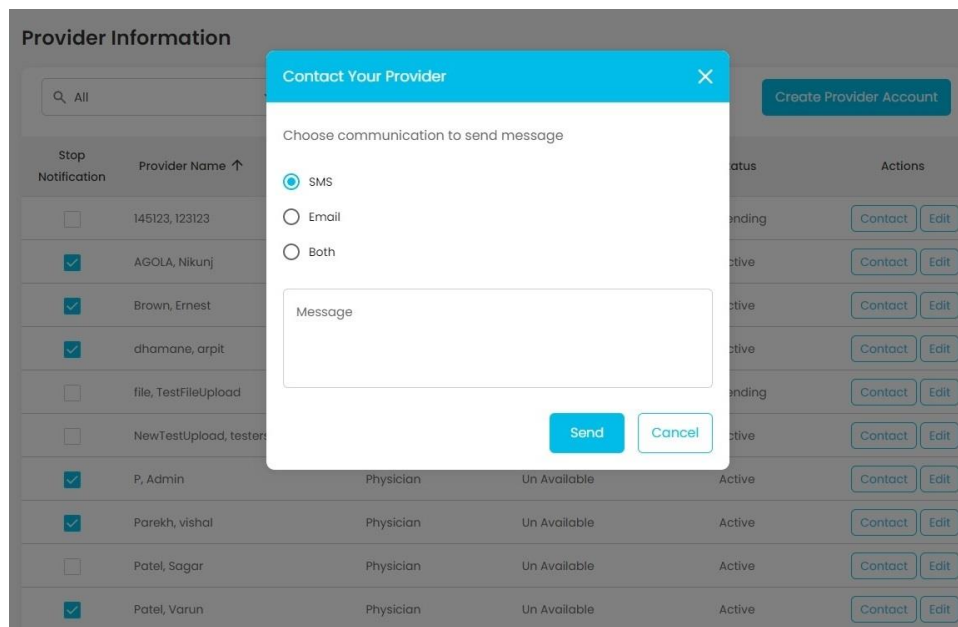


Fig25. Contact your Provider

By clicking the Contact button this pop-up will appear to the admin. Using this pop-up admin can send notification to provider by selected communication type (SMS, Email or Both) with a message.

#### Description:

This menu from header navbar contains 3 sub-menus: Provider, Scheduling, **Invoicing (Good to have feature)**.

#### Features:

#	Feature	Type	Description
	Search	Dropdown	Admin can filter provider list based on region
	Create Provider Account	Button	By Clicking on this, Admin can create new Provider account from Create Provider Account Page
	Stop notification	Checkbox	This checkbox will determine that provider will receive any notification or not. When any change is made, the Save button will appear.
	Provider name	Text	This column will show Provider name
	Role	Text	This column will show Provider's role on the Website
	On call status	Text	This column will show Provider's On call status: Un Available, On call, and Busy
	Status	Text	This column will show Provider's Account Status: Pending, Active and Not active
	Action	Button	<p>By clicking on this button, a menu will open, which has two sub menus.</p> <p>Contact Button: On clicking this button, contact your Provider pop up will open.</p> <p>Edit Button: On clicking this button Edit Physician Account page will be opened.</p>



Fig26. Edit Physician Account

**Description:**

Through this page, Admin can edit provider (Physician) details, change their password. Upload documents and images related to the provider and delete their account.

## Features:

#	Feature	Type	Description
---	---------	------	-------------

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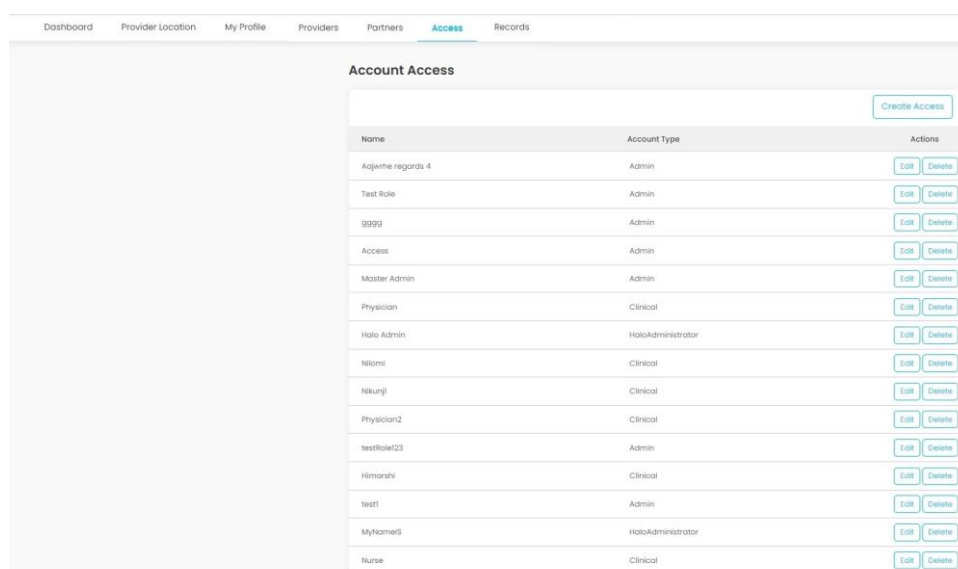
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	Username	Input	This input field will show the admin physician's username. This field will be disabled always.
	Password	Input	Admin can change account password using this field.
	Status	Dropdown	Admin can change physician status using this field. Status values are: Pending, Active and Not Active.
	Role	Dropdown	Admin can assign any physician Role to the account.
	Edit	Button	By clicking this button in a particular form section, a field will be enabled in that form section. And "Save" and "Cancel" button will replace "Edit" button.
	Reset password	Button	By clicking this button, admin can change physician account password with password entered in "Password" field.
	Save	Button	By clicking this button all the data will be saved except password in the database.
	Cancel	Button	By Clicking this button, all fields will become disabled without saving anything in database.
	First Name	Input	Admin can change physician's first name using this field.
	Last Name	Input	Admin can change physician's last name using this field.
	Email	Input	Admin can change physician's Email using this field.
	Phone Number	Input	Admin can change physician's phone using this field.
	Medical License	Input	Admin can change physician's medical license number using this field.
	NPI Number	Input	Admin can change physician's NPI (National Provider Identifier) number using this field.
	Synchronization Email	Input	Admin can change physician's Synchronization number using this field.
	Regions	Checkboxes	Admin can select one or more regions for physician. (At least one required.)
	Address1	Input	Admin can change physician's Address1 using this field.
	Address2	Input	Admin can change physician's Address2 using this field.
	City	Input	Admin can change physician's city using this field.

	State	Dropdown	Admin can select physician's state using this dropdown.
	Zip	Input	Admin can change Zip code associated with physician's address.
	Alternate Phone	Input	Admin can change physician's alternate phone number.
	Business name	Input	Admin can change physician's business name using this field.
	Business Website	Input	Admin can change physician's business website using this field.
	Photo	File Upload	Admin can upload physician's profile photo using this field.
	Signature	File Upload	Admin can upload physician's signature using this field.
	Admin Notes	Input	Admin can add any notes regarding what updates are done to the profile.
	Delete Account	Button	By clicking on this button, admin can delete physician's account.

Access/Roles:

Account Access:



The screenshot shows a web application interface with a navigation bar at the top containing links: Dashboard, Provider Location, My Profile, Providers, Partners, Access (highlighted), and Records. Below the navigation bar is a section titled "Account Access" with a "Create Access" button. A table lists various accounts with columns for Name, Account Type, and Actions (Edit, Delete).

Name	Account Type	Actions
Agarwal regards 4	Admin	<a href="#">Edit</a> <a href="#">Delete</a>
Test Role	Admin	<a href="#">Edit</a> <a href="#">Delete</a>
9999	Admin	<a href="#">Edit</a> <a href="#">Delete</a>
Access	Admin	<a href="#">Edit</a> <a href="#">Delete</a>
Master Admin	Admin	<a href="#">Edit</a> <a href="#">Delete</a>
Physician	Clinical	<a href="#">Edit</a> <a href="#">Delete</a>
Holo Admin	HoloAdministrator	<a href="#">Edit</a> <a href="#">Delete</a>
Nilani	Clinical	<a href="#">Edit</a> <a href="#">Delete</a>
Nikunj	Clinical	<a href="#">Edit</a> <a href="#">Delete</a>
Physician2	Clinical	<a href="#">Edit</a> <a href="#">Delete</a>
testRole23	Admin	<a href="#">Edit</a> <a href="#">Delete</a>
Himanshi	Clinical	<a href="#">Edit</a> <a href="#">Delete</a>
test1	Admin	<a href="#">Edit</a> <a href="#">Delete</a>
MyName15	HoloAdministrator	<a href="#">Edit</a> <a href="#">Delete</a>
Nurse	Clinical	<a href="#">Edit</a> <a href="#">Delete</a>

Fig27. Roles/Access

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### Description:

This page will show all the roles available on the platform. Admin can add, edit or delete any role. On add and edit admin can change access for the role.

### Features:

#	Feature	Type	Description
	Create Access	Button	Clicking on this button, admin will be redirected to create role page.
	Name	Table Header	It will show role name
	Account Type	Table Header	It will show account type associated with role
	Edit	Button	Clicking on this button, admin will be redirected to edit role page for particular role.
	Delete	Button	Clicking on this button, Admin can delete any role by confirming through confirmation pop-up

After clicking the Create Access button this page will be shown to the admin. Admin can create any role by choosing Account Type and Selecting page access through checkboxes.

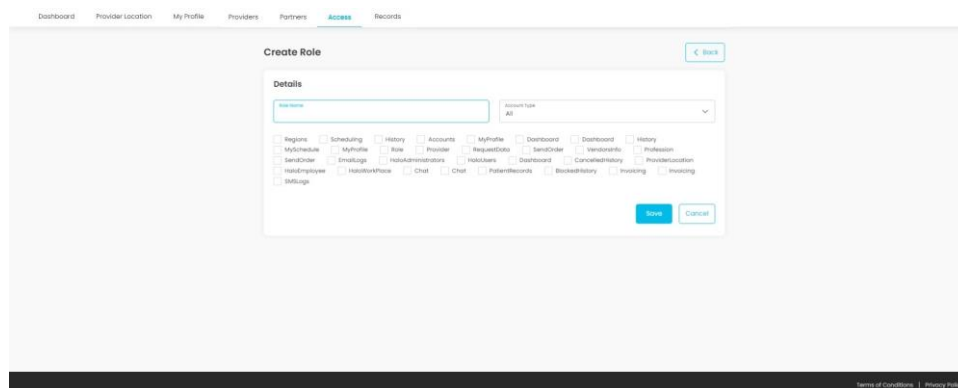


Fig28. Create Role All

Dashboard Provider Location My Profile Providers Partners **Access** Records

### Create Role

[< Back](#)

**Details**

Role Name  Account Type **Admin**

☐ Regions ☐ Scheduling ☐ History ☐ Accounts ☐ MyProfile ☐ Dashboard ☐ Role ☐ Provider ☐ RequestData  
☐ VendorInfo ☐ Profession ☐ SendOrder ☐ EmailLogs ☐ HoloAdministrators ☐ HoloUsers ☐ CancelledHistory  
☐ ProviderLocation ☐ HoloEmployee ☐ HoloWorkPlace ☐ Chat ☐ PatientRecords ☐ BlockedHistory ☐ Invoicing  
☐ SMILogs

**Save** **Cancel**

Fig29. Create Role Admin

Dashboard Provider Location My Profile Providers Partners **Access** Records

### Create Role

[< Back](#)

**Details**

Role Name  Account Type **Physician**

☐ Dashboard ☐ MySchedule ☐ MyProfile ☐ SendOrder ☐ Chat ☐ Invoicing

**Save** **Cancel**

Fig30. Create Role Physician

Dashboard Provider Location My Profile Providers Partners **Access** Records

### Create Role

[< Back](#)

**Details**

Role Name  Account Type **Patient**

**Save** **Cancel**

Fig31. 1 Create Role Patient

## User Access:

### Description:

This page will show all the registered users of this platform. Admin can edit any account

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Dashboard	Provider Location	My Profile	Providers	Partners	<b>Access</b>	Records
-----------	-------------------	------------	-----------	----------	---------------	---------

User Access					
<input type="text" value="All"/>					
Account type ↑	Account POC	Phone	Status	Open Requests	Actions
Admin	Test, Admin	+91 082006 99203	Active	2133	<a href="#">Edit</a>
Clinical	newTest, test123	(123) 123 - 123123	Pending	0	<a href="#">Edit</a>
Clinical	Vyas, himarshi	(123) 456 - 7890	Pending	0	<a href="#">Edit</a>
Clinical	Testing, Test	(NOK) NNN - NNNNNN	Pending	0	<a href="#">Edit</a>
Clinical	test, Test	(123) 456 - 789123	Pending	0	<a href="#">Edit</a>
Clinical	145123, 123123	(123) 456 - 789123	Pending	0	<a href="#">Edit</a>
Clinical	dhamane, arpit	(013) 538 - 43111	Active	9	<a href="#">Edit</a>
Clinical	Vyas, Himarshi	(123) 456 - 7890	Pending	1	<a href="#">Edit</a>
Clinical	shah, nilomi	(123) 456 - 4870	Pending	89	<a href="#">Edit</a>
Clinical	Tatva, Doctor	+91 082006 99203	Active	1	<a href="#">Edit</a>
Clinical	Patil, Ravi	+1 (201) 222-2222	Pending	0	<a href="#">Edit</a>

Fig31.2 Create Role Patient

#### Features:

#	Feature	Type	Description
	Search	Search box	Admin can search any account by role type
	Edit	Button	Clicking on this button will redirect admin to edit account page for particular account

#### Scheduling:

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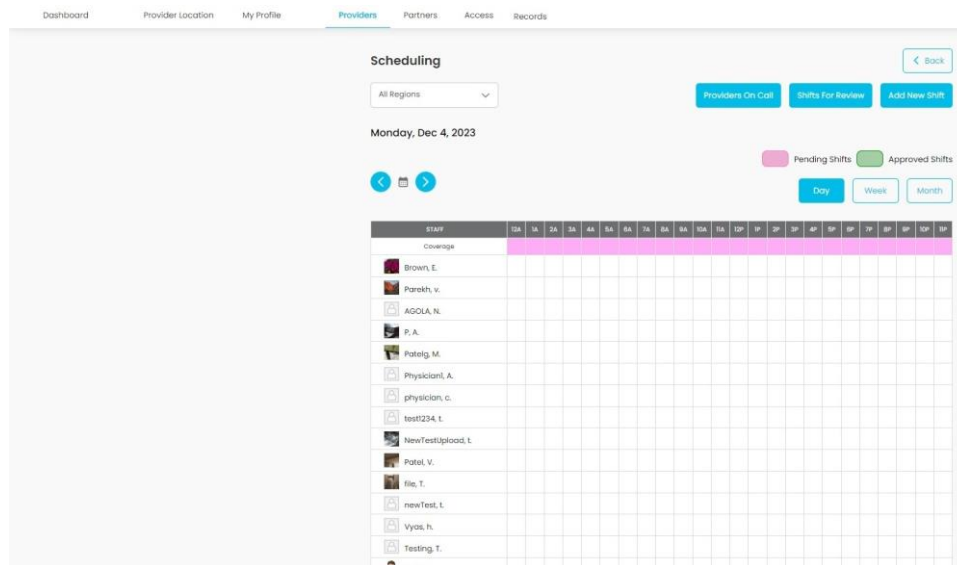


Fig32. Day wise Scheduling

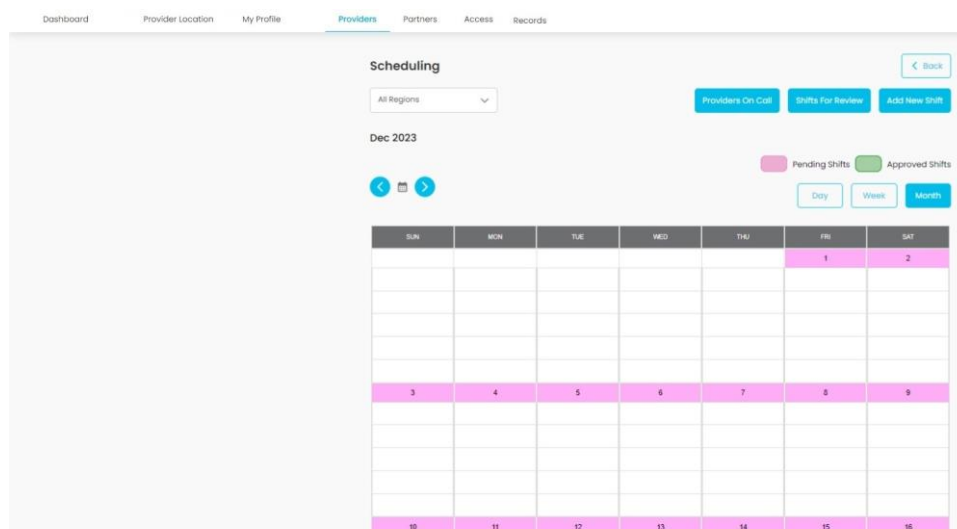


Fig33. Month wise Scheduling

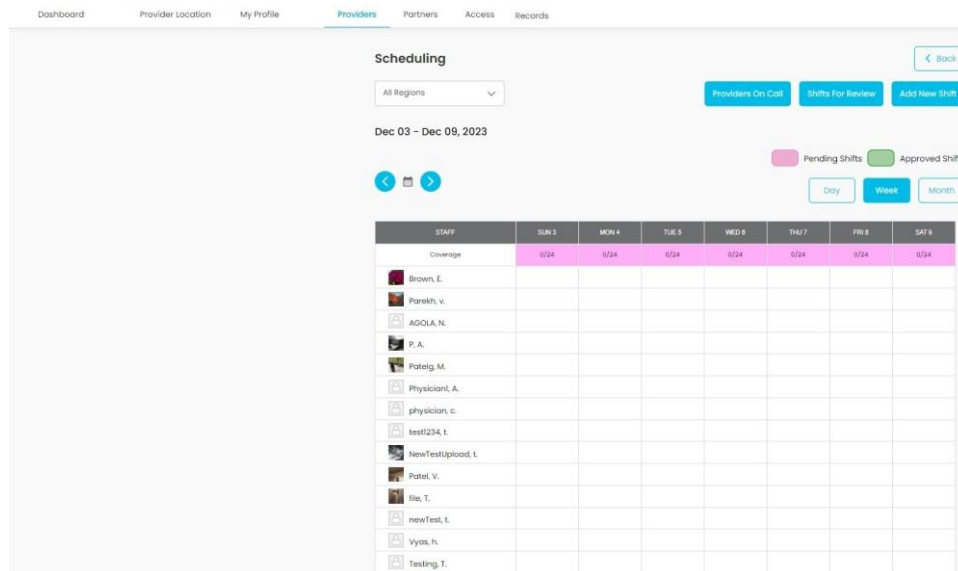


Fig34. Week wise Scheduling

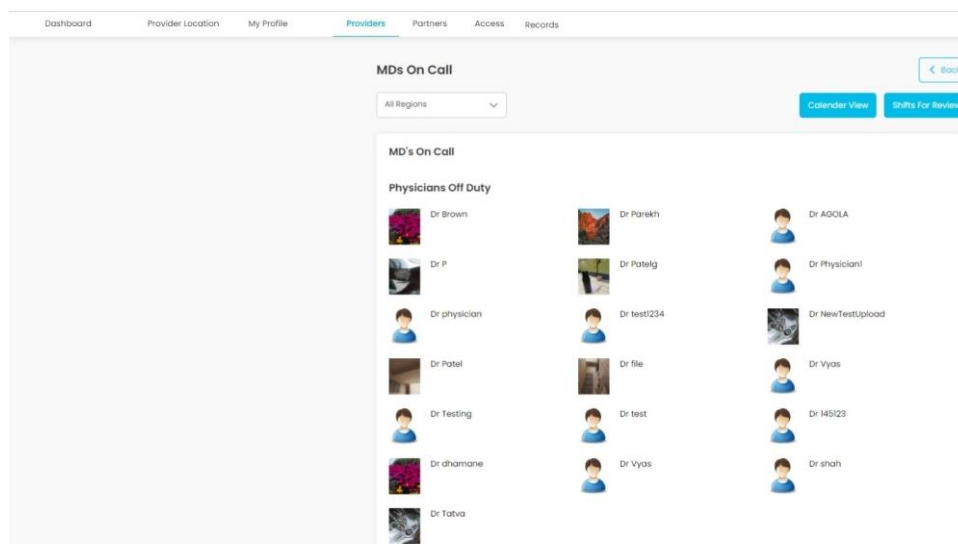




Fig35. Provider on call (MDs On Call)

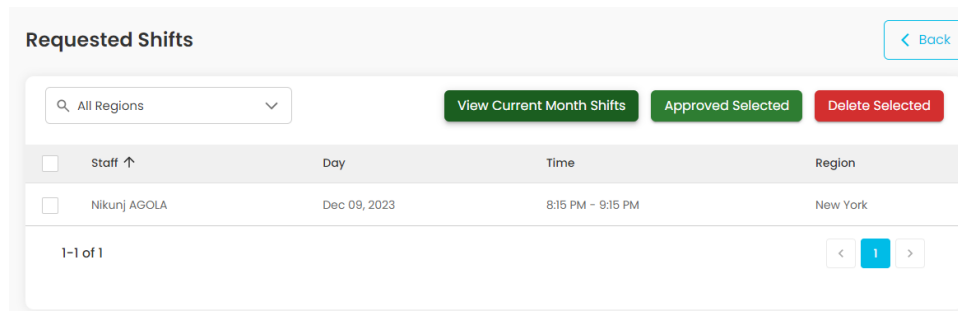


Fig36. Requested Shift

#### Description:

This page will allow Admin to review provider's shifts, add new shifts, providers on call based on selected region by weekly, monthly or daily in a calendar view. It's connected to Google calendar so Admin/Providers will get Google reminder of their scheduled shifts. All the shifts which are approved by admin will be colored green color and those which are not approved by admin will be colored with red color.

#### Features:

#	Feature	Type	Description
	Back	Button	It will redirect to dashboard page
	All Regions	Dropdown	It will allow admin to select regions from region drop-down
	Provider On call	Button	Clicking on this button will redirect to MD's On Call page. This page will show the list of providers who are on-call right now and who are off duty with their profile photos which has added by them in their profile.
	Shifts for review	Button	It will redirect to the Requested shifts page. This page will show the list of which are created by providers.
	Add new Shift	Button	Clicking on this button will open a pop-up for creating a new shift.
	Day	Button	Clicking on this button will show the created shifts in day wise.
	Week	Button	Clicking on this button will show the shifts created shifts on a weekly basis.
	Month	Button	Clicking on this button will show the shifts created on a monthly basis. Initially when admin lands on this page it will show the shifts in month format.

	View Current Month Shifts	Button	Clicking on this button will redirect an Admin to scheduling page to view shifts in monthly view.
	Approved selected	Button	Clicking on this button, admin can approve the selected shifts.
	Delete Selected	Button	Clicking on this button, admin can delete the selected shifts.
	Select All	Button	Clicking on this button, admin can select all the listed shifts.

Create new Shift

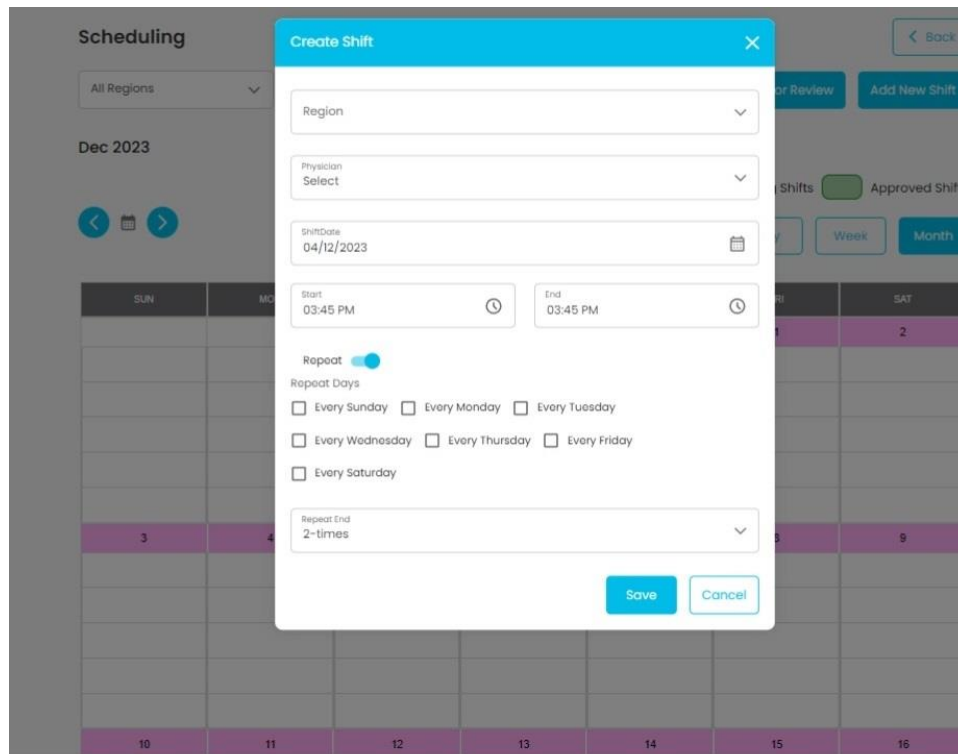


Fig37. Create Shift

#### Description:

This page will allow Admin to create shift for the provider with start date and time to end date and time. Admin can also create shifts that can be repeated in selected amount of time.

#### Features:

#	Feature	Type	Description
	Region	Dropdown	It will allow admin to select regions from region drop-down
	Provider	Dropdown	It will allow admin to select provider based on selected regions from region drop-down
	Day	Date picker	It will help to select the date of a shift
	Start	Time Picker	It will help to select the start time of a shift
	End	Time Picker	It will help to select the end time of a shift

	Repeat	Toggle Button	It will allow us to repeat the shift.
	Repeat days	Checkbox	It will be visible when you turn on the toggle button. You can select on which days you want to repeat the shift.
	Repeat end	Dropdown	It will be visible when you turn on the toggle button. You can select how many times you want to repeat the shift.
	Create	Button	Clicking on this button, the shift will be created with filled details
	Cancel	Button	Clicking on this button, the popup will be closed without creating a shift.

## View Edit/Delete Shift:

When admin clicks on today's shift or the future shift, View-shift popup will open to delete or edit that shift.

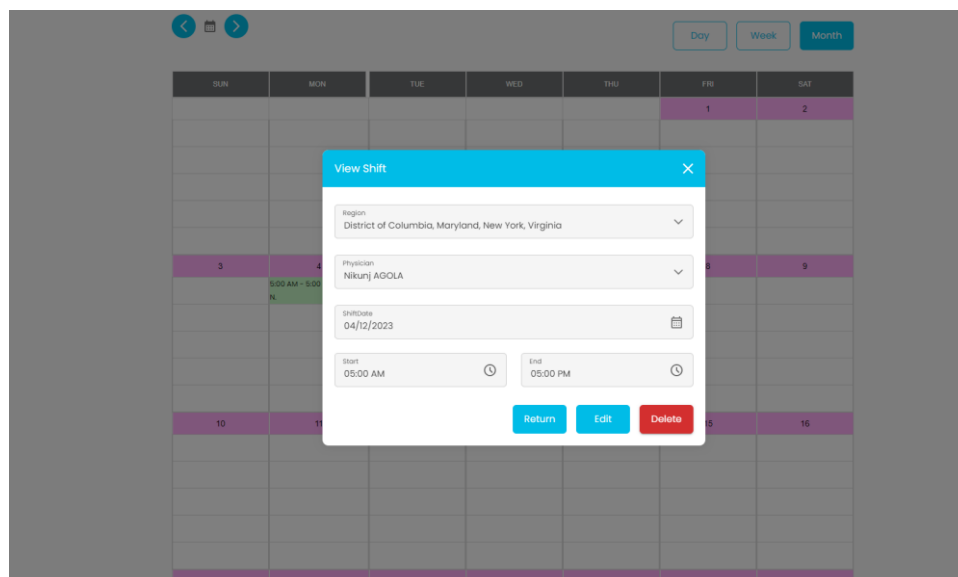


Fig38. View /edit /Delete Shift

## Features:

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#	Feature	Type	Description
	Region	Dropdown	It will show the shift's region. It will be disabled
	Provider	Dropdown	It will show the provider name. It will be disabled
	Day	Date picker	It will show the date of a shift. It will be disabled
	Start	Time Picker	It will show the start time of a shift. It will be disabled
	End	Time Picker	It will show the end time of a shift. It will be disabled
	Return	Button	Clicking on this button will change the shift status from Pending to Approved and vice versa.
	Edit	Button	Clicking on this button will make the date and start, end time fields enabled and Save button will be visible instead of Edit and admin can edit the details then click on save button to change the shift details.
	Delete	Button	Clicking on this button will delete the created shift.

## Provider Location:

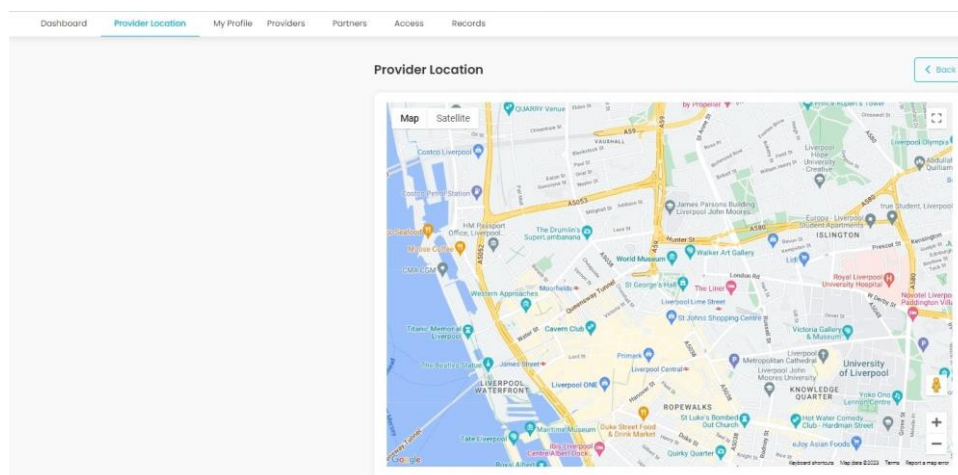


Fig39. Provider Location

### Description:

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This Page will show the Provider's (Physician) location in google map. Admins can see the exact location of every physician with their names.

## Partners/ Vendors:

Dashboard

Provider Location

My Profile

Providers

Partners

Access

Records

Vendor(s)

Search Vendors

All Professions

Add Business

Profession	Business Name	Email	Fax Number	Phone Number	Business Contact	Actions
	Testing Business	test2@gmail.com	(321) 456 - 7890	(321) 456 - 7890	test	<div>EditDelete</div>
Nkung/ta	David	..	(943) 943 - 99944	(943) 943 - 9944	..	<div>EditDelete</div>
Nkung/ta	fraga	..	(943) 943 - 99999	(777) 777 - 7777	..	<div>EditDelete</div>
Nkung/ta	Neveel	..	(360) 939 - 39999	(360) 939 - 39999	..	<div>EditDelete</div>
Proper	Komand'W'v	..	(393) 939 - 94294	(943) 312 - 42493	..	<div>EditDelete</div>
	test and delete	..	(943) 943 - 99499	(943) 499 - 94999	..	<div>EditDelete</div>
Nkung/ta	Shel	..	(393) 939 - 94294	(943) 312 - 42493	..	<div>EditDelete</div>
	Kaplan-Schwarz-Schwarze	..	(312) 312 - 99999	(321) 939 - 99999	..	<div>EditDelete</div>
	act	..	(943) 943 - 99499	(943) 943 - 9499	..	<div>EditDelete</div>
	patent transportation	..	(943) 943 - 99999	(493) 912 - 39934	..	<div>EditDelete</div>
Nkung/ta	radio	..	(943) 943 - 99493	(943) 943 - 99444	..	<div>EditDelete</div>
	yth	..	(943) 943 - 99494	(943) 499 - 94949	..	<div>EditDelete</div>
	py	..	(747) 747 - 7479	(746) 747 - 756	..	<div>EditDelete</div>
	Nkung	..	(943) 947 - 2299	(943) 947 - 2299	..	<div>EditDelete</div>
	wood	..	(432) 434 - 94942	(434) 342 - 23942	..	<div>EditDelete</div>

Fig40. Profession menu Partners/Vendors

Dashboard	Provider Location	My Profile	Providers	<b>Partners</b>	Access	Records
-----------	-------------------	------------	-----------	-----------------	--------	---------

**Add Business**

**Submit Information**

<input type="text" value="Business Name"/>	Profession: <input type="button" value="Select Profession"/>
<input type="text" value="Fax Number"/>	<input type="text" value="(201) 555-0123"/>
<input type="text" value="Email"/>	<input type="text" value="Business Contact"/>
<input type="text" value="Street"/>	<input type="text" value="City"/>
<input type="text" value="State"/>	<input type="text" value="Zip/postal"/>

Fig41.Add business page

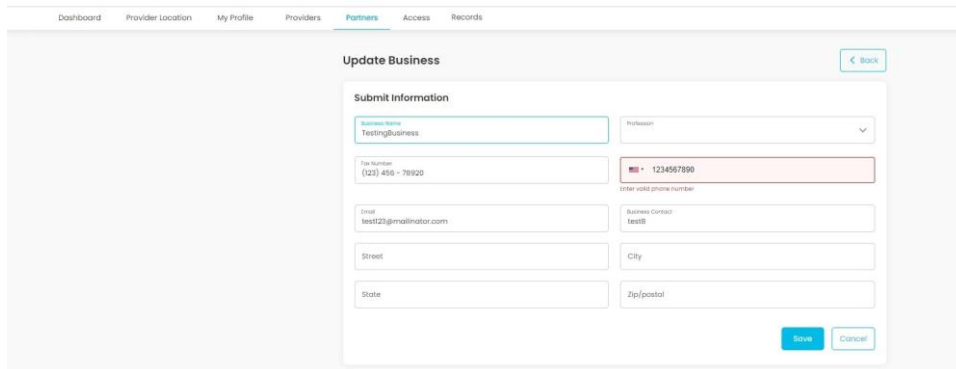


Fig42.Edit business page

#### Description:

This page will show all the vendors available on the platform. Admin can Add, Edit or Delete any vendor.

#### Features:

#	Feature	Type	Description
	Add business	Button	Clicking on this button will redirect admin to add business(vendor) page.
	Edit	Button	Clicking on this button will redirect admin to edit business page for particular vendor.
	Delete	Button	Clicking on this button, Admin can delete any vendor.

Add/Edit Vendor:

#### Description:

Admin can add or edit vendor using this page.

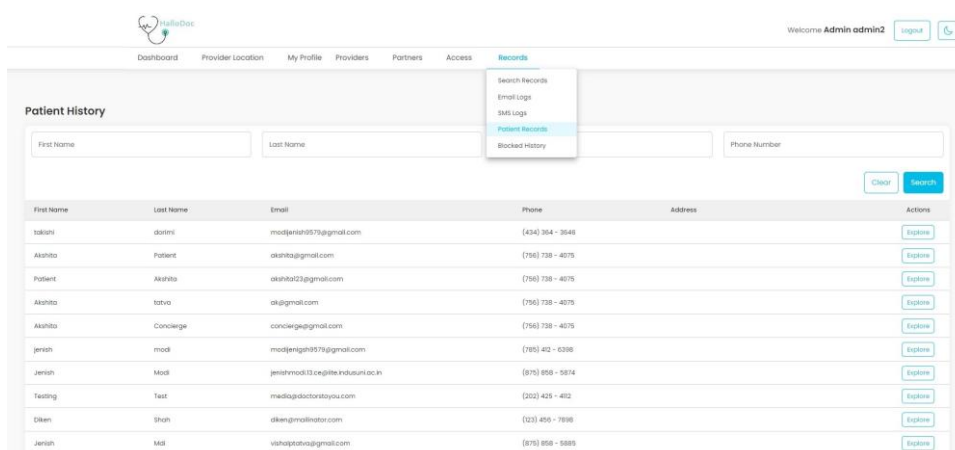
#### Features:

#	Feature	Type	Description
	Business name	Textbox	This will show Business name (Vendor name)
	Profession	Dropdown	This will show Vendor's profession.
	Fax Number	Textbox	This will show Vendor's fax number

	Phone number	Textbox	This will show vendor's phone number
	Email	Textbox	This will show Vendors Email address
	Business	Textbox	This will show Vendors Business Contact
	Street	Textbox	This will show Vendor's Street
	City	Textbox	This will show Vendor's city.
	State	Textbox	This will show the Vendor's state.
	Zip/postal	Textbox	This will show the Vendor's zip code.
	Save	Button	Clicking on this button, admin can save new vendor or edit existing vendor
	Cancel	Button	Clicking on this button will redirect admin to vendor's page
	Back	Button	Clicking on this button will redirect admin to vendor's page

## Records:

### Patient Record/Patient History



Dashboard Provider Location My Profile Providers Partners Access **Records**

Welcome Admin admin2 Logout

**Patient History**

First Name Last Name Email Phone Number

Search Records  
Email Logs  
SMS Logs  
**Patient Records**  
Blocked History

Clear Search

First Name	Last Name	Email	Phone	Address	Actions
Iskshi	Iskshi	modjensh057@gmail.com	(434) 384 - 3848		Explore
Alaksha	Patient	alaksha@gmail.com	(756) 738 - 4075		Explore
Patient	Alaksha	alaksha22@gmail.com	(756) 738 - 4075		Explore
Alaksha	tatva	ak@gmail.com	(756) 738 - 4075		Explore
Alaksha	Concierge	concierge@gmail.com	(756) 738 - 4075		Explore
Jensh	modi	modjensh057@gmail.com	(756) 412 - 6386		Explore
Jensh	Modi	jenshmodi33@theindus.in	(978) 898 - 5874		Explore
Teasing	Tea	madtagdoctor@yahoo.com	(202) 425 - 402		Explore
Diken	Shah	diken@gmail.com	(323) 495 - 7898		Explore
Jensh	Modi	visupatva@gmail.com	(978) 898 - 5885		Explore

Fig43. Patient history



**Patient Record** < Back

Client/Member	Created Date ↓	Confirmation	Provider Name	Concluded Date	Status	Final Report	Actions
Akshita, Test	Jun 24, 2021	MC062420AKTE0001	Dr. Parekh	Dec 11, 2023	Accepted	-	Actions
Test, Akshita	Feb 5, 2021	MC020520TEAK0001	Dr. Parekh	Feb 5, 2021	Closed	-	Actions
Gupta, Akshita	Feb 1, 2021	MC020120GUAK0001	Dr. AGOLA	Dec 11, 2023	Conclude	-	Actions
Request, Friend	Jul 12, 2020	MC017220REFR0001	Dr. Parekh	Mar 8, 2021	Closed	-	Actions
AKStagefamilyeq, Test	Jun 2, 2020	DC05022018ESU0001	Dr. Parekh	Dec 11, 2023	Accepted	-	Actions
Request-, Test	May 18, 2020	MC0518201ETED0022	Dr. Patel	Dec 11, 2023	Cancelled By Admin	-	Actions
Test, Test	May 18, 2020	MC0518201ETED0031	Dr. Parekh	Dec 11, 2023	Clear	-	Actions
Again, Test	May 18, 2020	DC0518201AGTE0030	Dr. Parekh	Dec 11, 2023	Cancelled By Provider	-	Actions
Request, Test	May 18, 2020	MC0518201ETED0029	Dr. Parekh	Dec 11, 2023	Clear	-	Actions
Akshita, Test	May 18, 2020	MC0518201AKTE0028	Dr. Parekh	Aug 31, 2020	Closed	-	Actions

Fig44. Patient Record Explore

#### Description:

This page will show all patients' records. Admin can search patient by First name, last name, email and phone number.

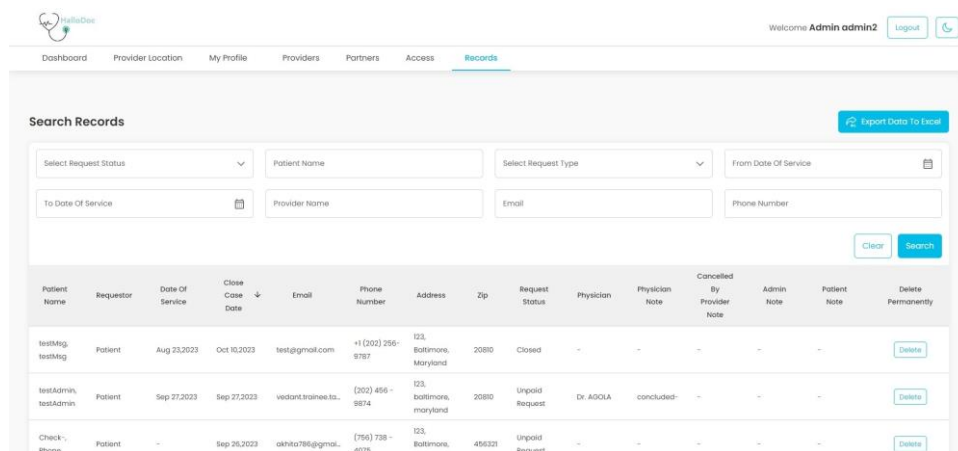
#### Features:

#	Feature	Type	Description
	First name	Textbox	Admin can search Patients records by first name
	last name	Textbox	Admin can search Patient records by last name
	Email	Textbox	Admin can search patient records by email address.
	Phone number	Textbox	Admin can search patient records by phone number.
	Search	Button	Clicking on this button, Admin can apply all search filters on patient records.
	Clear	Button	Clicking on this button will clear all search filters.
	Explore	Button	Clicking on this button, Admin can explore specific patient's previous case history
	View	Button	Clicking on this button, Medical-Report file for that patient will be download
	Documents	Button	Clicking on this button, admin will redirect to View Uploads page.

## Search Records:

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**Search Records**

Export Data to Excel

Select Request Status: Patient Name: Select Request Type: From Date Of Service: To Date Of Service: Provider Name: Email: Phone Number: Clear Search

Patient Name	Requestor	Date Of Service	Close Case Date	Email	Phone Number	Address	Zip	Request Status	Physician	Physician Note	Cancelled By	Admin Note	Patient Note	Delete Permanently
testMsg, testMsg	Patient	Aug 23,2023	Oct 10,2023	test@gmail.com	+1 (202) 256-5787	123, Baltimore, Maryland	20880	Closed	-	-	-	-	-	Delete
testAdmin, testAdmin	Patient	Sep 27,2023	Sep 27,2023	vedant.trainee.ta...	(202) 456-5874	123, Baltimore, Maryland	20880	Unpaid Request	Dr. ASOLA	concluded-	-	-	-	Delete
Check-Phone	Patient	-	Sep 26,2023	akshita788@gmail...	(756) 738-4275	123, Baltimore, ...	456321	Unpaid Request	-	-	-	-	-	Delete

Fig45. Search Records

#### Description:

This page will show All Requests Data. Admin can search any request data by payment status, patient name, request type, date of service, email, phone number, provider name.

#### Features:

#	Feature	Type	Description
	Export Data to Excel	Button	Clicking on this button, Admin can export Request Data to excel file.
	Select Request Status	Dropdown	Admin can search request data using payment status of the request. (Pending, Settled, Declined, Settled Offline)
	Patient Name	Textbox	Admin can request data history using patient's name
	Select Request Type	Dropdown	Admin can request data history using the request type of the request.
	From Date of service	Date-picker	Admin can search request data to a from Date of Service.
	To Date of service	Date-picker	Admin can search request data to a Date of Service.
	Provider Name	Textbox	Admin can search request data by Provider name
	Email	Textbox	Admin can search request data by email
	Phone Number	Textbox	Admin can search request data by phone number
	Clear	Button	Clicking on this button will clear all search values.

	Search	Button	Clicking on this button, Admin can apply all search values on Requests Data.
	Delete permanently	Button	Clicking on this button, Admin can delete a request data permanently.

## Logs (Email logs and SMS logs)

Dashboard Provider Location My Profile Providers Partners Access **Records**

**Email Logs (Gmail)** [Back](#)

Search by role: **All** Receiver Name: Email Id: Created Date: Sent Date: [Search](#) [Clear](#)

Recipient	Action	Role Name	Email Id	Create Date	Sent Date	Sent	Sent Times	Confirmation Number
shah, nitomi	Request Monthly Data	Physician	nitomi.shah@tatvasoft.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
Vyas, Himanshi	Request Monthly Data	Physician	himanshi.vyas@gmail.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
ghamane, arpit	Request Monthly Data	Physician	arpit.ghamane@tatvasoft.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
test, Test	Request Monthly Data	Physician	test2@gmailinator.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
Testing, Test	Request Monthly Data	Physician	test@gmailinator.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
Patel, Varun	Request Monthly Data	Physician	testsoft14@gmail.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
Patel, Meetingg	Request Monthly Data	Physician	seha18@gmail.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
P. Admin	Request Monthly Data	Physician	adigm@gmail.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-
ADOLA, Nikunj	Request Monthly Data	Physician	meghna.tatvasoft2022@gmail.com	Dec 03, 2023 7:50 AM	Dec 03, 2023	Yes	1	-

Fig45. Email Log

Dashboard Provider Location My Profile Providers Partners Access **Records**

**SMS Logs (Twilio)** [Back](#)

Search by role: **All** Receiver Name: Mobile Number: Created Date: Sent Date: [Search](#) [Clear](#)

Recipient	Action	Role Name	Mobile Number	Create Date	Sent Date	Sent	Sent Times	Confirmation Number
Tatva, Doctor		Physician	+91 082006 99203	Nov 30, 2023 9:00 PM	Nov 30, 2023	No	1	-
shah, nitomi		Physician	(22) 456 - 4870	Nov 30, 2023 9:00 PM	-	No	4	-
Vyas, Himanshi		Physician	(22) 456 - 7890	Nov 30, 2023 9:00 PM	-	No	4	-
ghamane, arpit		Physician	(22) 538 - 4301	Nov 30, 2023 9:00 PM	-	No	4	-
145125, 123123		Physician	(22) 456 - 789023	Nov 30, 2023 9:00 PM	-	No	4	-
test, Test		Physician	(22) 456 - 789023	Nov 30, 2023 9:00 PM	-	No	4	-
Testing, Test		Physician	(N/A) N/A - NNNNNN	Nov 30, 2023 9:00 PM	-	No	4	-
Vyas, himanshi		Physician	(22) 456 - 7890	Nov 30, 2023 9:00 PM	-	No	4	-
newTest, test123		Physician	(22) 123 - 123123	Nov 30, 2023 9:00 PM	-	No	4	-
file, Test123abcd		Physician	(22) 123 - 123122	Nov 30, 2023 9:00 PM	-	No	4	-

Fig46. SMS Log

### Description:

This page will show all email and SMS logs.

### Features:

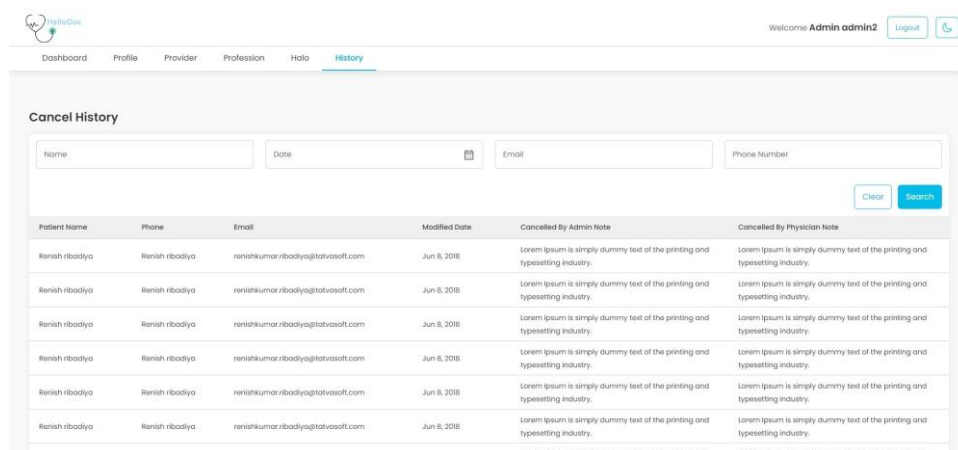
#	Feature	Type	Description
---	---------	------	-------------

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E-mail us at: [business@tatvasoft.com](mailto:business@tatvasoft.com)

	Search by Role	Dropdown	Admin can filter logs by selecting a role. By Default, Logs will be shown for all roles.
	Recipient name	Textbox	Admin can search logs by Recipient name.
	Email Id	Textbox	Admin can search email logs by email id.
	Phone number	Textbox	Admin can search SMS logs by phone number.
	Created Date	Date-picker	Admin can search logs by created date.
	Sent Date	Date-picker	Admin can search logs by sent date.
	Search	Button	Admin can search record as per filters
	Clear	Button	Admin can clear search

## Cancel History(removed)



Cancel History

Patient Name	Phone	Email	Modified Date	Cancelled By Admin Note	Cancelled By Physician Note
Renish ribadiya	Renish ribadiya	renishkumarribadiya@tatvasoft.com	Jun 8, 2018	Lorem Ipsum is simply dummy text of the printing and typesetting industry.	Lorem Ipsum is simply dummy text of the printing and typesetting industry.
Renish ribadiya	Renish ribadiya	renishkumarribadiya@tatvasoft.com	Jun 8, 2018	Lorem Ipsum is simply dummy text of the printing and typesetting industry.	Lorem Ipsum is simply dummy text of the printing and typesetting industry.
Renish ribadiya	Renish ribadiya	renishkumarribadiya@tatvasoft.com	Jun 8, 2018	Lorem Ipsum is simply dummy text of the printing and typesetting industry.	Lorem Ipsum is simply dummy text of the printing and typesetting industry.
Renish ribadiya	Renish ribadiya	renishkumarribadiya@tatvasoft.com	Jun 8, 2018	Lorem Ipsum is simply dummy text of the printing and typesetting industry.	Lorem Ipsum is simply dummy text of the printing and typesetting industry.
Renish ribadiya	Renish ribadiya	renishkumarribadiya@tatvasoft.com	Jun 8, 2018	Lorem Ipsum is simply dummy text of the printing and typesetting industry.	Lorem Ipsum is simply dummy text of the printing and typesetting industry.
Renish ribadiya	Renish ribadiya	renishkumarribadiya@tatvasoft.com	Jun 8, 2018	Lorem Ipsum is simply dummy text of the printing and typesetting industry.	Lorem Ipsum is simply dummy text of the printing and typesetting industry.

Fig. Cancel History

### Description:

This page will show all cancelled cases. Admin can search cancelled cases by Name, Date, Email, Phone number.

### Features:

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E-mail us at: [business@tatvasoft.com](mailto:business@tatvasoft.com)

#	Feature	Type	Description
	Name	Textbox	Admin can search cancelled case by patient name
	Date	Date-picker	Admin can search cancelled case by date of Cancellation
	Email	Textbox	Admin can search for cancelled case by email address.
	Phone number	Textbox	Admin can search for cancelled case by phone number.
	Search	Button	Clicking on this button, Admin can apply all search filter on cancelled case.
	Clear	Button	Clicking on this button will clear all search filters.

## Block history:

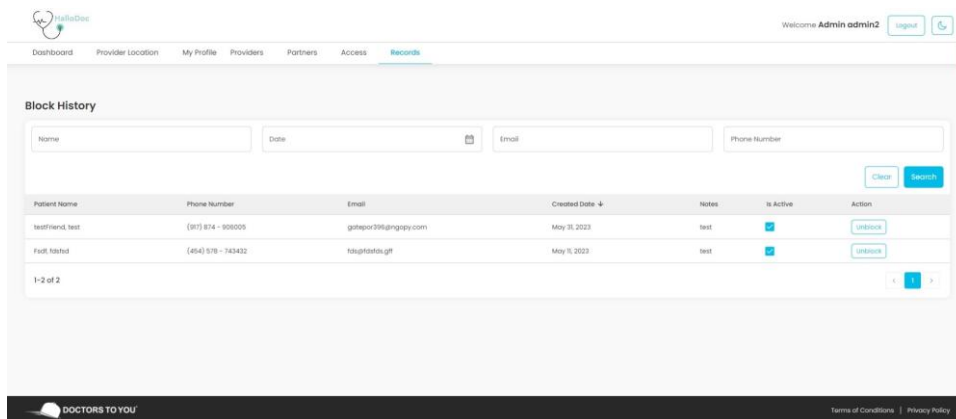


Fig47. Block History

### Description:

This page will show all blocked cases. Admin can Search any blocked case by name, date, email and phone number.

### Features:

#	Feature	Type	Description
	Name	Textbox	Admin can search blocked cases by patient name

	Date	Date-picker	Admin can search blocked case by Created date
	Email	Textbox	Admin can search blocked case by email address.
	Phone number	Textbox	Admin can search blocked cases by phone number.
	Search	Button	Clicking on this button, Admin can apply all search filter on blocked case.
	Clear	Button	Clicking on this button will clear all search filters.
	Unblock	Button	Clicking on this button, Admin can unblock any case

## Create Requests for Admin and physician:

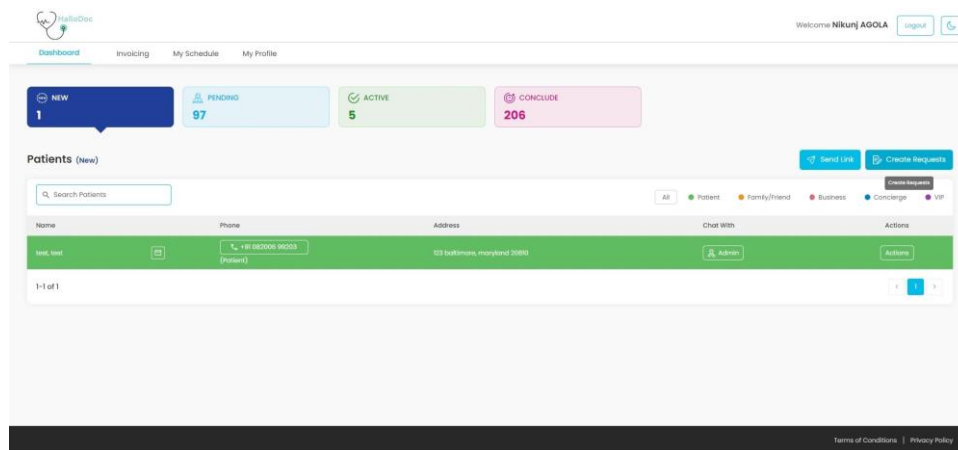


Fig48. Create Requests

### Description:

This page will help for creating a request from admin and provider side.

### Features:

#	Feature	Type	Description
	First Name	Textbox	It will show full name of the patient
	Last Name	Textbox	It will show last name of the patient

	Date of birth	Textbox	It will show date of birth of the patient
	Phone number	Textbox	It will show Phone number of the patient
	Email	Textbox	It will show Email of the patient
	Street	Textbox	It will show Street of the user
	City	Textbox	It will show City of the user
	State	Textbox	It will show Street of the user
	Zip code	Textbox	It will show Zip code of the user
	Room	Textbox	It will show Room of the user
	Verify	Button	Clicking on this button system will verify that the entered address belongs to their available service areas or not.
	Map	Button	Clicking on this button will open the entered location in Google map
	Physician notes	Textbox	It will be visible only when the provider is creating a request. It helps to add additional comment for provider related to that request.
	Admin Notes	Textbox	It will be visible only when admin is creating a request. It helps to add additional comment for admin related to that request.
	Save	Button	Clicking on this button will save a new request
	Cancel	Button	Clicking on this button will redirect to dashboard page
	Back	Button	Clicking on this button will redirect to dashboard page

### 3. Provider dashboard:

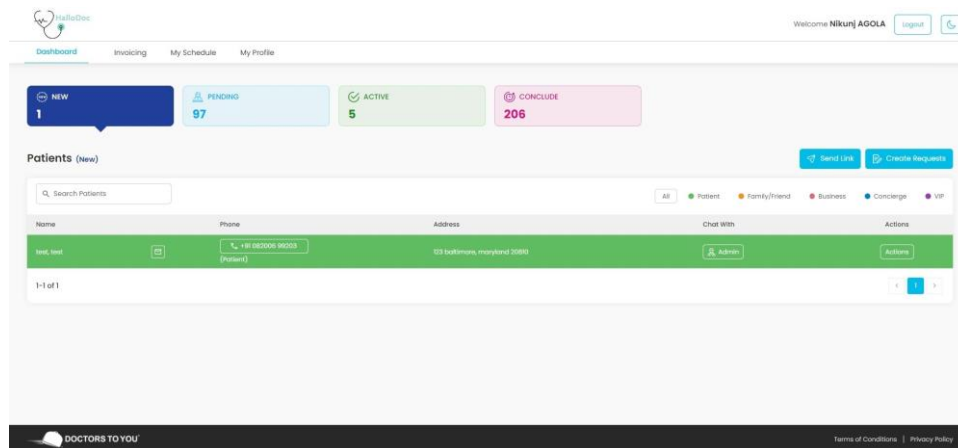


Fig49. Provider dashboard

#### Description:

Once the login is successfully completed by the provider, he/she will be automatically directed to the platform's landing page, which will showcase the patient requests. The provider will have the ability to filter the requests based on their request type and search for specific requests using the patient's name or the name of the requestor. On desktop devices, the requests can be viewed in a grid format, while on mobile devices, a card view will be provided for optimal display.

#### Features:

#	Feature	Type	Description
	New	Button	Clicking on this button, Provider can view all the newly created patient requests which are assigned to him by admin.
	Pending	Button	Clicking on this button, Provider can view all patient requests which are accepted by that provider and patients who do not have accepted the agreement yet.
	Active	Button	Clicking on this button, Provider can view all requests for which patients have accepted the agreement or providers has choose House-call for providing the care.
	Conclude	Button	Clicking on this button, Provider can view all requests for which he has completed their service from his side.



	Send Link	Button	Clicking on this button, Provider can send link to patients for creating a request via email and SMS.
	Create Request	Button	Clicking on this button, Provider can create a request on behalf of patient.
	Search Patients	Input	Provider can search patients by patient name, requestor name

## Provider Active State: Action > Encounter

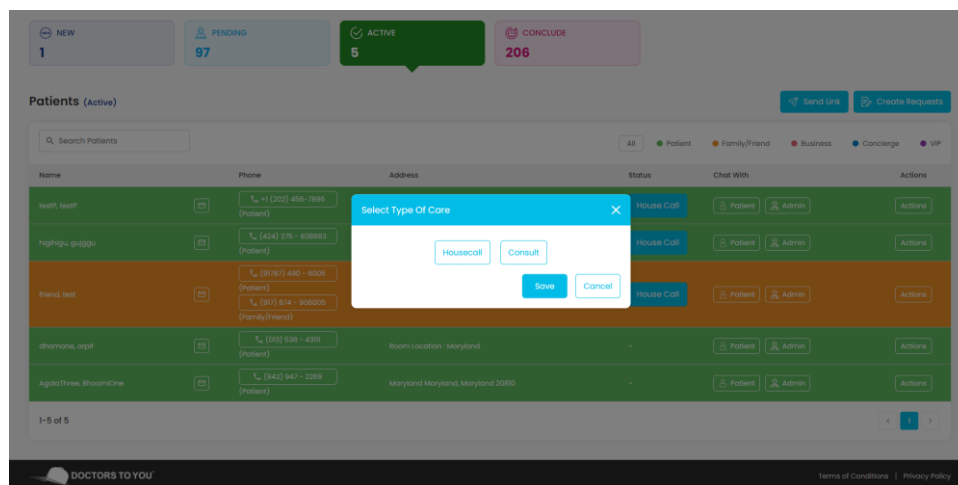


Fig50.Encounter (Type Of care)

When request is in Active state, provider needs to select the type of care for the patients. So, when request is in Active state and provider hasn't selected any type of care then if he/she will click on Encounter from Actions menu then this kind of Select type of care pop-up will open with dropdown list which contains 2 options of care type: consult and house-call. If the provider selects the consult, then that request will move into Conclude state. If the provider will select house-call, then another dropdown will be visible to select the approximate arrival time of the provider to that patient's house. That dropdown contains options from 0.5 hour to 6 hour with a 30-minute gap.

## Provider Conclude State: Action > Encounter form

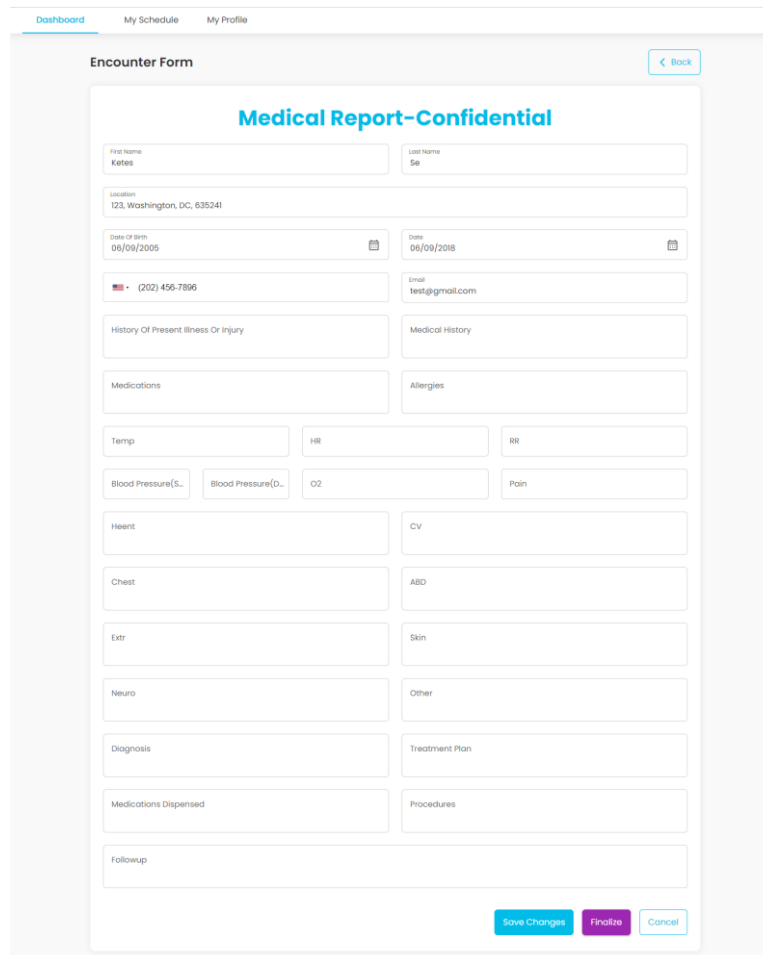
### Description:

Once the call type is selected, the provider can add an encounter form which is basically a medical report created by checking patient's medical condition. The provider can save the form multiple times, but he can

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finalize the form only one time. And after finalizing the form he cannot edit the form. Admin can see or edit the form whether form is finalized or not, but admin cannot finalize any encounter form.



The screenshot shows the 'Encounter Form' interface. At the top, there are navigation links: 'Dashboard', 'My Schedule', and 'My Profile'. The form itself is titled 'Medical Report-Confidential' and includes a 'Back' button in the top right corner. The form fields are organized into several sections:
 

- Personal Information:** First Name (Kates), Last Name (Se), Location (123, Washington, DC, 635241), Date of Birth (06/09/2005), and Date (06/09/2018).
- Contact Information:** Phone number ((202) 456-7896) and Email (test@gmail.com).
- Medical History:** History Of Present Illness Or Injury, Medical History, Medications, and Allergies.
- Vital Signs:** Temp, HR, RR, Blood Pressure(S...), Blood Pressure(D...), O2, and Pain.
- Physical Examination:** Heart, CV, Chest, ABD, Extr, Skin, Neuro, and Other.
- Treatment and Follow-up:** Diagnosis, Treatment Plan, Medications Dispensed, Procedures, and Followup.

 At the bottom right, there are three buttons: 'Save Changes' (blue), 'Finalize' (purple), and 'Cancel' (light blue). The 'Finalize' button is highlighted, indicating the current state of the form.

Fig51.Conclude State > Action > Encounter Form

#### Features:

#	Feature	Type	Description
	First name	Input	Users need to enter the patient's first name.
	Last name	Input	Users need to enter patient last name.
	Location	Input	Users need to enter the patient's whole address.
	Date of Birth	Date-Picker	Users need to select the date of birth of the patient.

	Date of Service	Date-picker	Users need to select the date of service of the request on which he provided service to the patient.
	Phone Number	Input	Users need to enter the phone number of the patient.
	Email	Input	Users need to enter the email of the patient.
	History of Present Illness or Injury	Input	Users can enter the history of a patient's illness or injury.
	Medical History	Input	Users can enter a patient's medical history.
	Medications	Input	User can enter medications for the patient
	Allergies	Input	Users need to enter allergies of the patient.
	Temperature	Input	Users can enter the body temperature of the patient when the physician visits the patient.
	HR (Heart Rate)	Input	User can enter patient's heart rate
	RR (Respiratory Rate)	Input	User can enter patient's Respiratory Rate
	Blood pressure	Input	User can enter patient's blood pressure
	O2	Input	User can enter patient's Oxygen level
	Pain	Input	User can enter patient's pain
	HEENT	Input	Users can enter patient's HEENT (head, eyes, ears, nose, and throat) examination results.
	CV	Input	Users can enter a patient's cardiovascular readings.
	Chest	Input	Users can enter patient's chest examination results.
	ABD	Input	Users can enter a patient's Abdomen (ABD) examination results.
	Extr	Input	User can enter patient's Extremities examination results.
	Skin	Input	Users can enter patient's skin examination results.
	Neuro	Input	Users can enter patient's neuro examination results.
	Other	Input	Users can enter patient's other examination results.

	Diagnosis	Input	User can enter diagnosis of patient's disease.
	Treatment plan	Input	Users need to enter a treatment plan for the patient.
	Medication dispensed	Input	Users need to enter medications which were dispensed during patient visits.
	Procedures	Input	Users need to enter procedures from which patients must pass through.
	Follow-up	Input	Users need to enter follow-up which should be taken by the patient.
	Save Changes	Button	Clicking on this button will save encounter form and user will stay on same page.
	Finalize	Button	Clicking on this button will finalize the encounter form and the user will be redirected to dashboard.
	Cancel	Button	Clicking on this button, the user will be redirected to dashboard without saving any form data.
	Back	Button	Clicking on this button, the user will be redirected to dashboard without saving any form data.

Once the encounter form is finalized, the provider cannot open it to edit the form. If provider clicks on encounter button from action menu Encounter form Already finalized pop-up will be shown. From this pop-up provider you can download finalized encounter form.

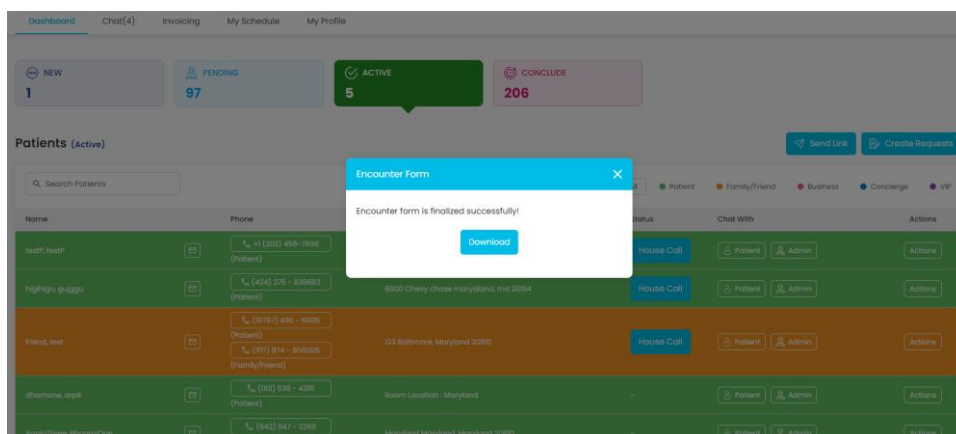


Fig52. Encounter Finalize popup

Provider > Pending State > Action > transfer request pop-up

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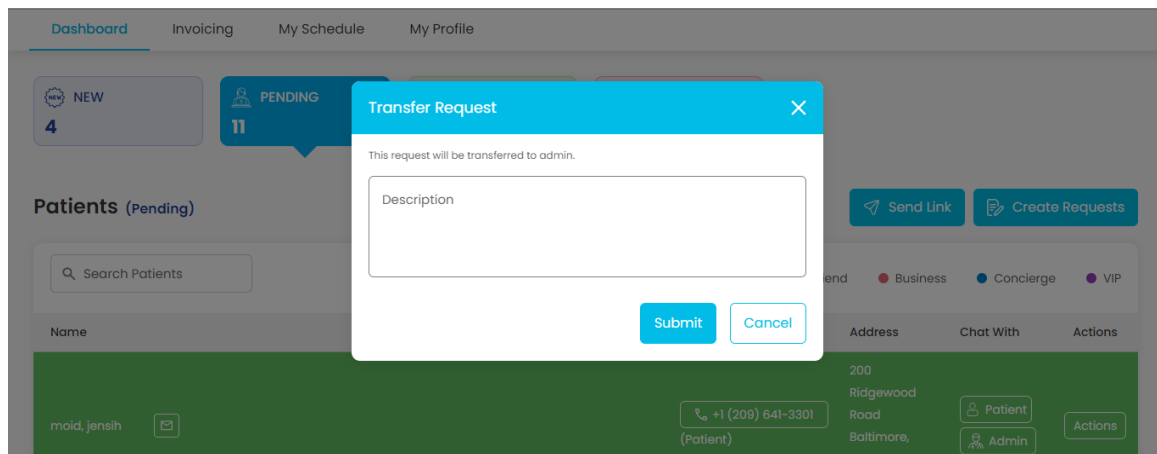


Fig53. Provider transfer request pop-up

#### Description:

This pop-up will allow Provider to transfer the request back to Admin. Then Admin will decide to whether to cancel the request or assign it to different or same provider.

#### Features:

#	Feature	Type	Description
	Description	Textbox	Detailed description for transferring the request to Admin
	Submit	Button	Clicking on this button, the request will be transferred to the admin. Admin will get notification for the same and also able to view the transfer notes in View Notes page.
	Cancel	Button	Clicking on this button, popup will be closed without transferring request to Admin.

My profile:

Provider My profile

Dashboard
Invoicing
My Schedule
My Profile

My Profile

Back

Request To Admin

Account Information

User Name

MD.Agola.N

Password

Reset Password

Physician Information

First Name

Nikunj

Last Name

AGOLA

Email

meghna.tatvasoft2020@gmail.com

Phone

+ 076749 08005

Medical License #

NPI Number

☒ District Of Columbia
☒ New York
☒ Virginia
☒ Maryland

Mailing & Billing Information

Address 1

1234

Address 2

ahmedabad

City

Ahmedabad

State

Maryland

Zip

380038

Phone

+ 1234567894

Provider Profile

Business Name

Tatva

Business Email

health.care@yahoo.com


Select Photo

Upload

Select Signature

Upload

Create



Provider Agreement

View

HIPAA Compliance

View

Fig54. Provider My Profile

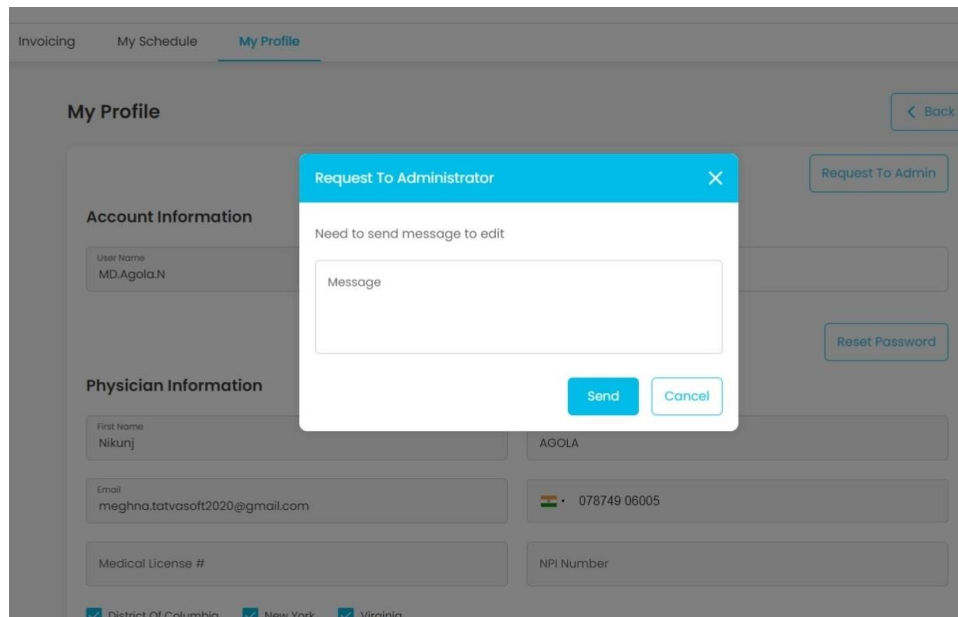


Fig55. Provider My Profile Request to Admin

#### Description:

This page will show the profile for the logged in provider. Providers can edit their information from this page. For the provider's My Profile page, if the provider wants to edit his/her profile, he/she has to request an admin first. Once the request is approved by the admin, the admin can then edit the details in the provider's profile using the provider page.

#### Features:

#	Feature	Type	Description
	Username	Textbox	This will show Username of the logged in user
	Password	Textbox	User can reset their password using this field
	Status	Dropdown	This will show Status of user (Pending, Active, not active)
	Role	Dropdown	This will show role of the user
	Edit	Button	Clicking on this button will enable password field and reset password button. and it will show Save and Cancel button instead of Edit button
	Reset Password	Button	Clicking on this button will allow user to reset their password which was entered in Password field
	First Name	Textbox	This will show first-name of the user

	Last Name	Textbox	This will show last name of the user
	Email	Textbox	This will show email of the user
	Confirm Email	Textbox	This will be used to confirm the email
	Mobile Number	Textbox	This will show mobile number of the user
	Region	Checkbox	This will show all selected regions
	Edit	Button	Clicking on this button will enable all fields for editing and also display Save and Cancel button instead of Edit
	Save	Button	Clicking on this button will save all edited information beside the password
	Cancel	Button	Clicking on this button will disable all fields without saving any changes.
	Address 1	Textbox	It will show first line of Address
	Address 2	Textbox	It will show second line of Address
	City	Textbox	It will show City of the user
	State	Textbox	It will show State of the user
	Zip	Textbox	It will show Zip code associated with user address
	Alternative Phone	Textbox	It will show alternative phone number of user
	Edit	Button	Clicking on this button will enable all fields for editing and also display Save and Cancel button instead of Edit
	Save	Button	Clicking on this button will save all edited information beside the password
	Cancel	Button	Clicking on this button will disable all fields without saving any changes.
	Back	Button	Clicking on this button will redirect to dashboard page.
	Request To Admin	Button	Clicking on this button, request to administrator pop-up will open
	Send	Button	Clicking on this button, admin will get notification via email.



## My schedule:

Dashboard
Invoicing
**My Schedule**
My Profile

### My Schedule

Schedule for: Feb 1 - Feb 29, 2024

<

📅

>

Pending Shifts

Approved Shifts

Add New Shift

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

My Schedule - Provider

### Description:

This page will show the shifts that are created by provider and allow them to create new shift, which is created in pending shifts.

**My Schedule**

Schedule for: Feb 1 - Feb 29, 2024

< >

Shiffts Approved Shifts

Add New Shift

**Create Shift**

Region

Shiftdate  
02/02/2024

Start  
09:45 AM

End  
09:45 AM

Repeat ☒

Repeat Days

☐ Every Sunday ☐ Every Monday ☐ Every Tuesday

☐ Every Wednesday ☐ Every Thursday ☐ Every Friday

☐ Every Saturday

Repeat End  
2-times

Save Cancel

Create Shift - Provider

## 4. Patient site:



Submit A Request

Registered Patients

[Terms of Conditions](#)

[Privacy Policy](#)

Fig56. Patient site

#### Description:

This page will open when the patient hits the URL of our patient website.

#### Features:

#	Feature	Type	Description
	Submit Request	Button	Clicking on this button will redirect the patient to create request page

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	Registered Patients	Button	Clicking on this button will redirect the patient to login page
--	---------------------	--------	---

## Submit request screen:

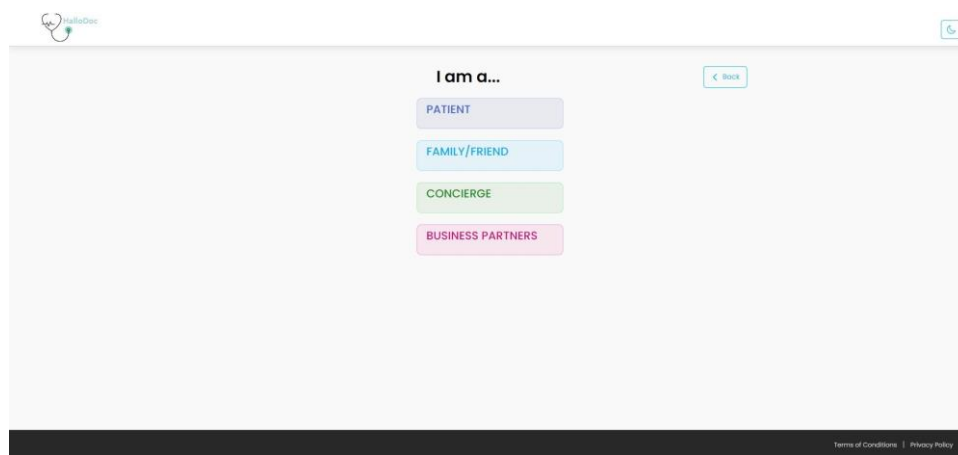


Fig57. Submit request screen

### Description:

This page will allow patients to create 4 different types of requests.

### Features:

#	Feature	Type	Description
	Patient	Button	Clicking on this button will display the form of creating a request as a patient.
	Family/Friend	Button	Clicking on this button will display the form of creating a request as a family/friend on behalf of a patient.
	Concierge	Button	Clicking on this button will display the form of creating a request as a Concierge(hotel) on behalf of their guests who need the doctor consultation.
	Business Partner	Button	Clicking on this button will display the form of creating a request as a business partner on behalf of their business partner who needs the doctor consultation.

## Create Patient request:

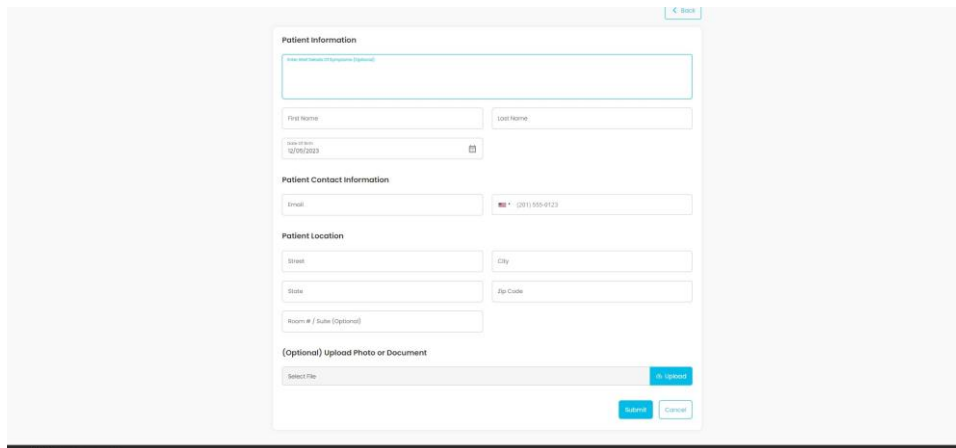


Fig58. Create Patient request

### Description:

This page will allow any patient to add request for themselves. Patients can add their symptoms, upload any files or documents which can help doctor for medical care.

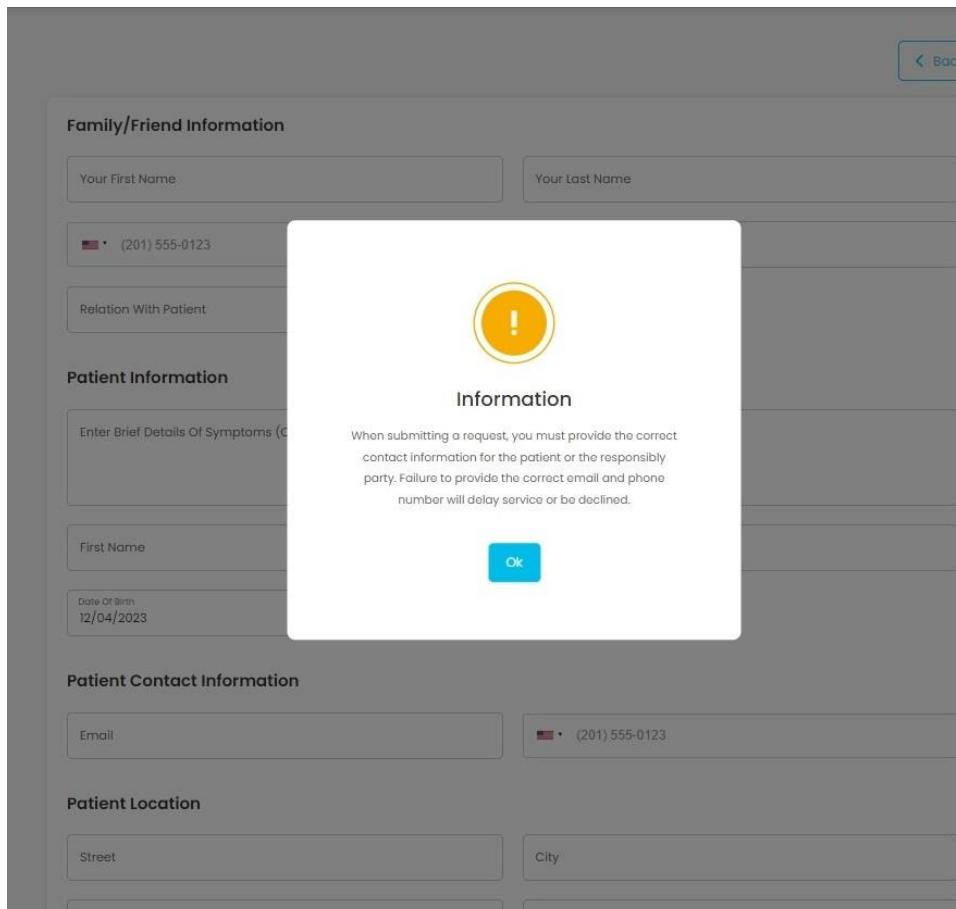
**NOTE:** If the patient account associated with the email entered is not registered, two more fields for the password and confirm password will appear. If a patient account doesn't already exist, one will be made using their email address and password. Only requests of the patient type may use this.

### Features:

#	Feature	Type	Description
	Symptoms	Textbox	Patients can enter their symptoms in this field.
	First Name	Textbox	Patients need to enter their first name in this field.
	Last Name	Textbox	Patients need to enter their last name in this field.
	Birth Date	Input	Patients need to select their birthdate in this field.

	Email	Textbox	Patients need to enter their email address in this field.
	Phone Number	Textbox	Patients need to enter their phone number in this field.
	Patient Location	Textbox	Patient must provide their location with zip code
	Upload	Button	Clicking on this button, Patient can upload any image of document related to the request.
	Submit	Button	Clicking on this button, Patient can submit their request.
	Back	Button	Clicking on this button, Patient will be redirected to Submit Request screen.

Create Family friend request:

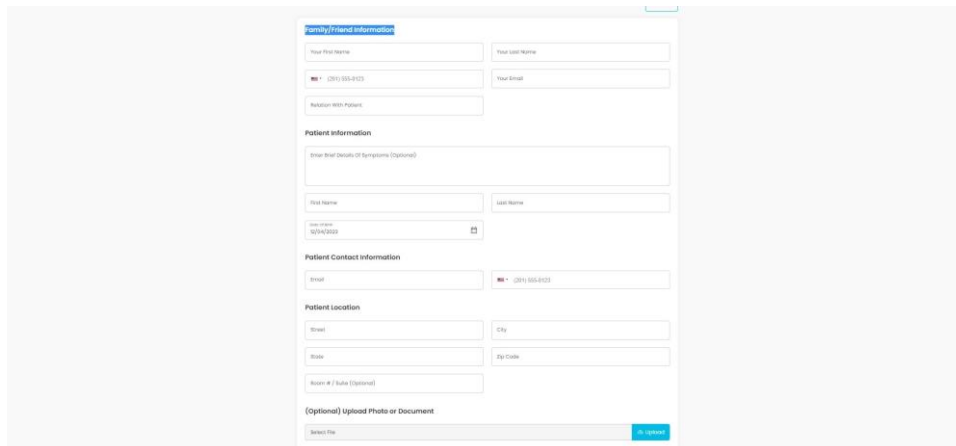


The screenshot shows a web form titled "Family/Friend Information" with fields for "Your First Name", "Your Last Name", a phone number (country code dropdown, area code dropdown, and number), and "Relation With Patient". Below this is the "Patient Information" section with a text area for "Enter Brief Details Of Symptoms (Optional)", "First Name", "Last Name", "Date Of Birth" (with a date picker), and "Email". The "Patient Contact Information" section includes "Email" and "Phone Number". The "Patient Location" section includes "Street", "City", "State", and "Zip Code". An "Ok" button is visible at the bottom right of the form.

**Information**

When submitting a request, you must provide the correct contact information for the patient or the responsibly party. Failure to provide the correct email and phone number will delay service or be declined.

Ok



The screenshot shows the same web form as above, but with the "Ok" button replaced by a "Submit" button. The form is titled "Family/Friend Information" and includes the following sections:

- Family/Friend Information:**
  - Your First Name
  - Your Last Name
  - Phone Number (Country Code, Area Code, Number)
  - Relation With Patient
- Patient Information:**
  - Enter Brief Details Of Symptoms (Optional)
  - First Name
  - Last Name
  - Date Of Birth (Date Picker)
  - Email
- Patient Contact Information:**
  - Email
  - Phone Number (Country Code, Area Code, Number)
- Patient Location:**
  - Street
  - City
  - State
  - Zip Code
  - Apartment / Suite (Optional)
- (Optional) Upload Photo or Document:**
  - Select File
  - Upload

Fig59. Create Family/friend request

#### Description:

This page will allow any family member or friends to add requests on behalf of an actual patient.

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#### Features:

#	Feature	Type	Description
	First name	Input	Requestors need to enter their first name in this field.
	Last name	Input	Requestors need to enter their last name in this field.
	Phone number	Input	Requestors need to enter their phone number in this field.
	Email	Input	Requestors need to enter their email address in this field.
	Relation with Patient	Input	Requestors can specify their relationship with the patient.
	Symptoms	Input	Requestor can enter symptoms of patient.
	Patient First name	Input	Requestor needs to enter the first name of the patient.
	Patient last name	input	The requestor needs to enter the last name of the patient.
	Patient Birthdate	Input	Requestor needs to select birthdate of patient.
	Patient Email	Input	Requestor needs to enter patients email address
	Patient Phone	Input	Requestor needs to enter patients phone number.
	Patient Location	Input	Requestor needs to provide patients location with zip code.
	Upload	Button	Clicking on this button, Requestor can upload any image of document related to the request.
	Submit	Button	Clicking on this button, the Requestor can submit a request on behalf of the patient.
	Back	Button	Clicking on this button, Requestor will be redirected to Submit Request screen.

Create Concierge request:

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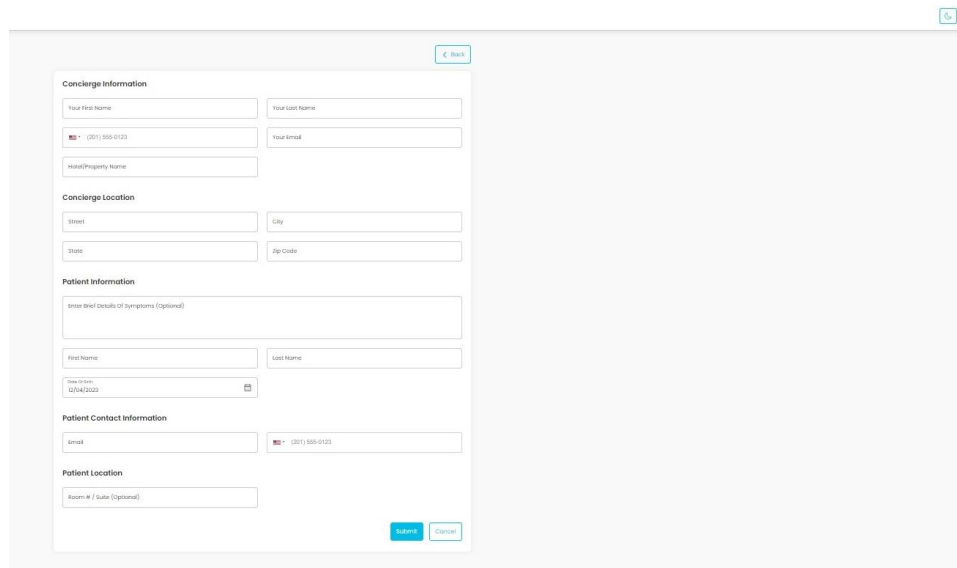


Fig60. Create concierge request

#### Description:

This page will allow any concierge (hotel staff) to create medical care request for a patient.

#### Features:

#	Feature	Type	Description
	First name	Input	Requestors need to enter their first name in this field.
	Last name	Input	Requestors need to enter their last name in this field.
	Phone number	Input	Requestors need to enter their phone number in this field.
	Email	Input	Requestors need to enter their email address in this field.
	Hotel/ Property name	Input	Requestors need to enter their property name in which patient needs medical care.
	Concierge location	Input	Requestor needs to provide their location with zip code.
	Symptoms	Input	Requestor can enter symptoms of patient.
	Patient First name	Input	Requestor needs to enter the first name of the patient.
	Patient last name	input	The requestor needs to enter the last name of the patient.

	Patient Email	Input	Requestor needs to enter patients email address
	Patient Phone	Input	Requestor needs to enter patients phone number.
	Room number/ location	Input	Requestor can provide room number in which patient is stayed.
	Submit	Button	Clicking on this button, the Requestor can submit a request on behalf of the patient.
	Back	Button	Clicking on this button, Requestor will be redirected to Submit Request screen.

## Create business request:

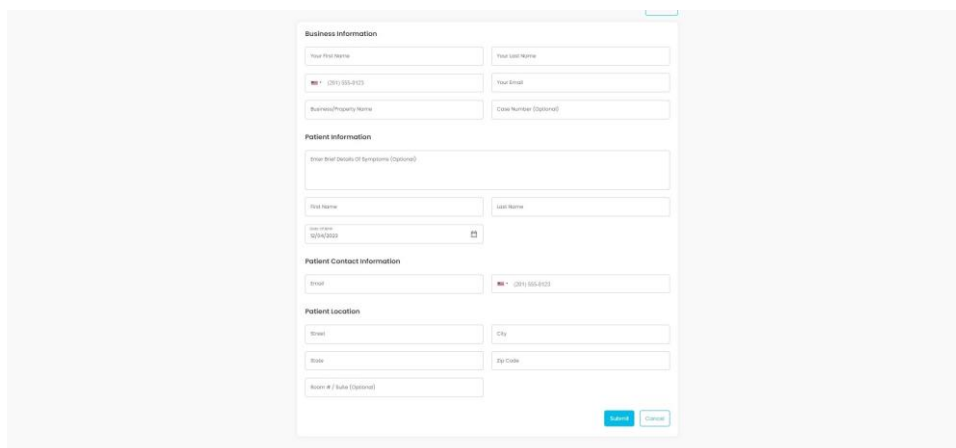


Fig61. Create business request

### Description:

This page will allow any business partner to create medical requests for patients.

### Features:

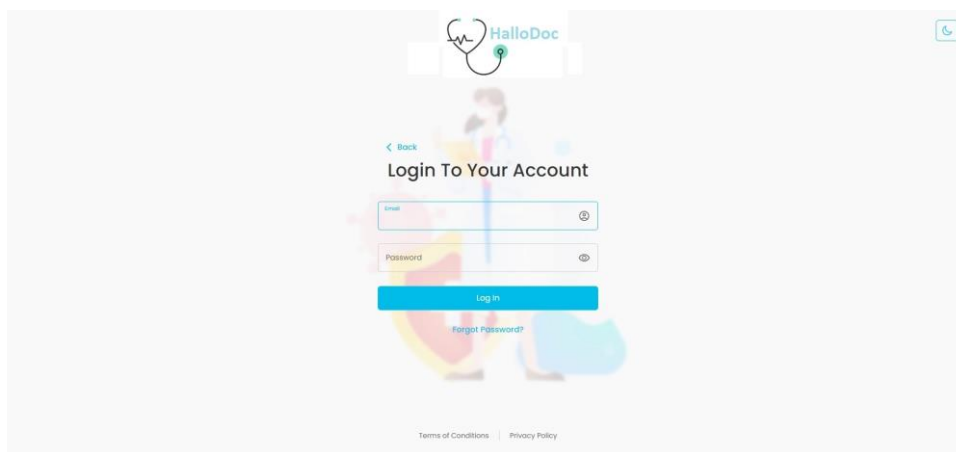
#	Feature	Type	Description
	First name	Input	Requestors need to enter their first name in this field.
	Last name	Input	Requestors need to enter their last name in this field.
	Phone number	Input	Requestors need to enter their phone number in this field.

	Email	Input	Requestors need to enter their email address in this field.
	Business/ Property name	Input	Requestors need to enter their business name
	Case Number	Input	Requestor can enter case number of patient
	Symptoms	Input	Requestor can enter symptoms of patient.
	Patient First name	Input	Requestor needs to enter the first name of the patient.
	Patient last name	input	The requestor needs to enter the last name of the patient.
	Patient Email	Input	Requestor needs to enter patients email address
	Patient Phone	Input	Requestor needs to enter patients phone number.
	Patient Location	Input	Requestor needs to provide patients location with zip code.
	Submit	Button	Clicking on this button, the Requestor can submit a request on behalf of the patient.
	Back	Button	Clicking on this button, Requestor will be redirected to Submit Request screen.

## Registered Patient:

### Description:

This page will appear when the user lands on the platform.



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Fig62.Login Patient Account

**Description:**

Users can login to platform using their email address and password.

**Features:**

#	Feature	Type	Description
	Email address	Input	User will need to enter his email address in this text box.
	Password	Input	Users will need to enter his password in this text box.
	Login	Button	After entering the correct email address and password, clicking on this button will allow user to sign into the platform.
	Forgot password	Link	If a user forgets his or her password, he or she must select "Forgot password?"
	Footer links	Link	It will display links to pages such as Terms of condition and privacy policy.

## Reset Password

**Description:**

Users will receive a link for this page via email when requested through forgot password page. When Page is loaded Link will be checked for expiration.

**Features:**

#	Feature	Type	Description
	Password	Input	Users will need to enter a new password.
	Confirm Password	Input	User will need to confirm the new password
	Reset	Button	Clicking on this button, User can reset their password.

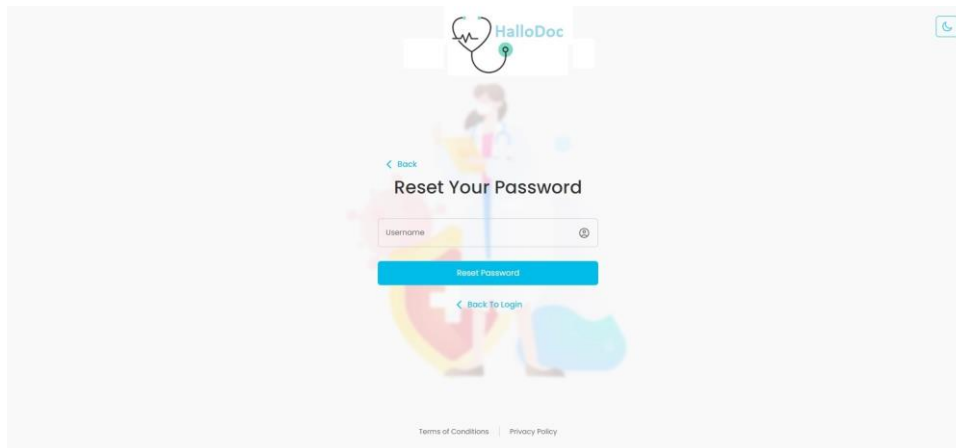


Fig63. Reser Your Password

## Patient Dashboard:

### Description:

This page will be shown when Patient logs in to the platform with valid patient credentials. This page will allow patients to see their request status.

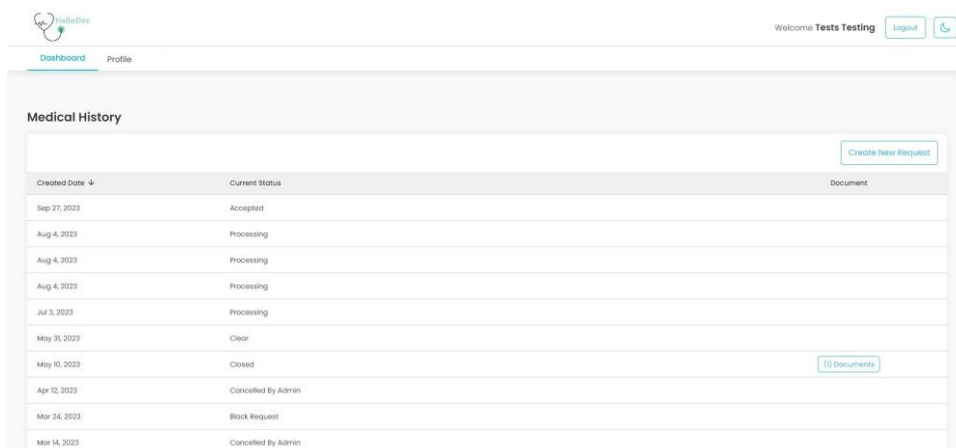


Fig64. Patient Dashboard

## Features:

#	Feature	Type	Description
	Documents	Button	Clicking on this button will redirect Patient to View Documents page.
	Create New Request	Button	Clicking on this button, Patient can create new request for themselves or someone else.

## Create New Request

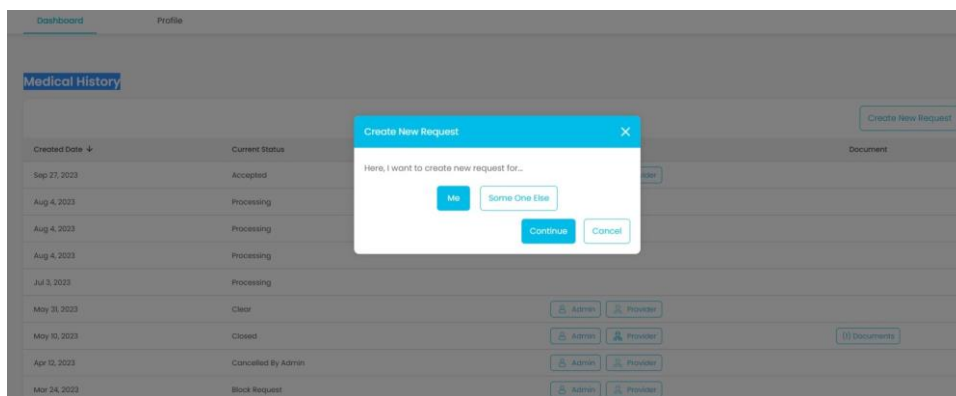


Fig65.Patient Create New Request

## Submit Information me

**Submit Information**

< Back

**Patient Information**

Enter Brief Details Of Symptoms (Optional)

First Name  
Tests

Last Name  
Testing

Date Of Birth  
12/11/2023

**Patient Contact Information**

Email  
meghna.tatvasoft2020@gmail.com

078749 06004

**Patient Location**

Street

City

State

Zip Code

Room # / Suite (Optional)

Map

**Upload Photo or Document (Optional)**

Select File

Upload

Submit

Cancel

Fig66.Submit Information me

Submit Information Someone else

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E-mail us at: [business@tatvasoft.com](mailto:business@tatvasoft.com)

Submit information [← Back](#)

**Patient information**

Enter Brief Details Of Symptoms (Optional)

First Name Last Name

Date of Birth 12/1/2023

**Patient Contact Information**

Email (201) 555-8123

**Patient Location**

Street City

State Zip Code

Room # / Suite (Optional) [Map](#)

**Relation**

Relation With Patient (Optional)

**Upload Photo or Document (Optional)**

Select File [Upload](#)

[Submit](#) [Cancel](#)

Fig67.Submit Information Someone else



## View Documents:

### Description:

This page will allow patients to download all the documents uploaded for request and also patients can upload new documents.

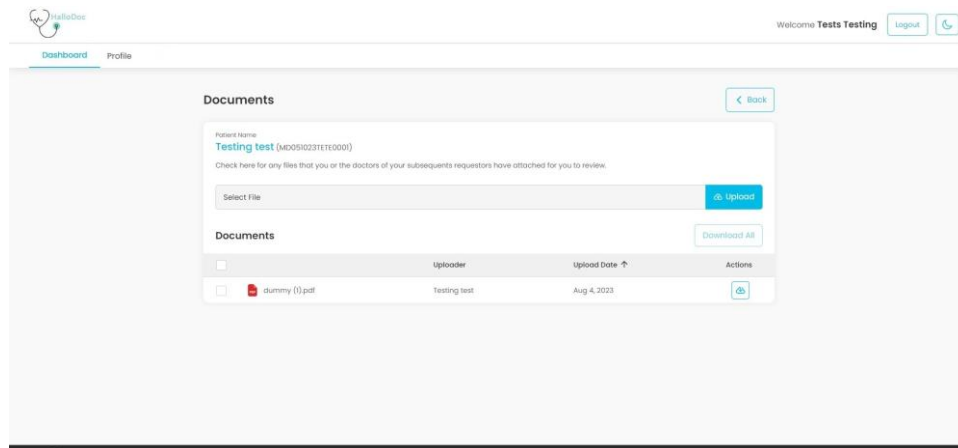


Fig68. View Documents

### Features:

#	Feature	Type	Description
	Upload	File	Patients can upload any file using this file input.
	Download	Button	Clicking on this button, Patient can download the document

## Patient Profile:

Dashboard
Profile

User Profile

First Name

test

Last Name

test

Date Of Birth

08/06/2019

Type

Mobile

98765 43210

Email

test@gmail.com

Street

123

City

Baltimore

State

Maryland

Zip Code

20810

Map

Edit

#### Description:

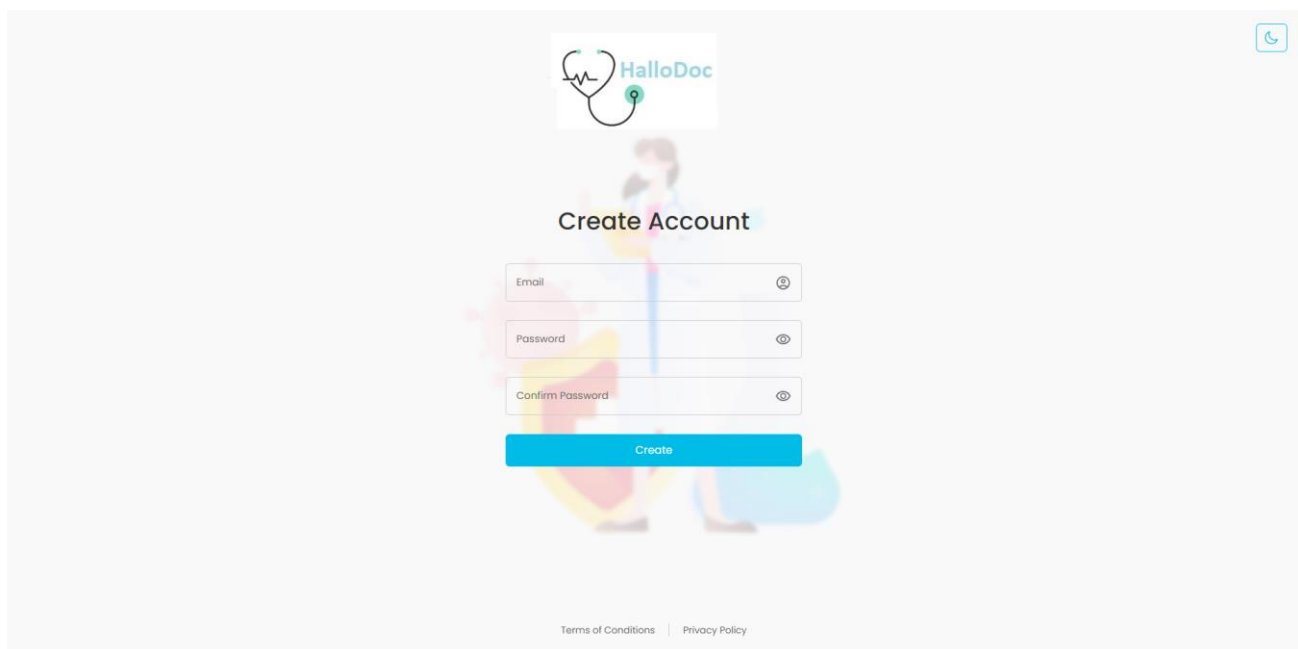
This page will allow patients to Edit their profile. By default, all the fields will be disabled.

#### Features:

#	Feature	Type	Description
	First name	Textbox	Patient can edit their first name.
	Last name	Textbox	Patient can edit their last name.
	Date of birth	Datepicker	Patient can edit their Date of birth.
	Phone number Type	Select	Patient can select type of their phone, Mobile or Landline
	Phone number	Textbox	Patient can edit their phone number.
	Email	Textbox	Patient can edit their email address.
	Location Information	Address	Patient can edit their address with zip code
	Map	Button	By clicking on this button, patient can see their entered address in map.

	Edit	Button	By clicking on this button, fields will get enabled to edit, and Save and Cancel button will replace edit button.
	Save	Button	By clicking on this button, patient can save profile changes in database. After saving Edit button will replace Save and cancel and all fields will be disabled.
	Cancel	Button	By clicking on this button, patient can discard profile changes, After that Edit button will replace Save and cancel and all fields will be disabled.

## Create Patient Account:



**Create Account**

Email

Password

Confirm Password

**Create**

[Terms of Conditions](#) | [Privacy Policy](#)

**Description:**

This page will not be visible directly to the patient. Every time a request for Family/friend, Concierge, Business is created link for this page is sent to the patient to create account.

**Features:**

#	Feature	Type	Description
	Email	Textbox	Patient will enter their email for registration.
	Password	Textbox	Patient will enter password for the account.
	Confirm Password	Textbox	Patient will confirm their password.
	Create	Button	By Clicking this button, Account will be created for this email and created account id will be saved in Request data.

## Technology Stack

Use relevant technologies as per instructions provided:

- ✓ Back end: ASP. Net Core API | Node JS | ASP. Net MVC | PHP 7
- ✓ Front end: React JS | Angular 11+ | Vue JS | ASP. Net MVC | PHP 7
- ✓ Database: SQL Server 2017 | Mongo | Postgres | My SQL
- ✓ Tools/IDE: Visual Studio 2019 | Visual Studio Code
- ✓ Source Control Repository: GitHub
- ✓ ORM: Entity Framework | Sequalize

Thank you