



# **Dotmark Medical Solutions (DMS) Front Office Manual**

*"Easy, Quick and Efficient"*

At DMS we strive to facilitate and streamline all your enterprise needs to achieve excellent care delivery and clinical productivity.

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# Introduction

After logging in, you will be navigated to the DMS dashboard. DMS dashboard contains tools that can be used for many purposes. These all will be discussed in this manual.

Front office can scan NFC card directly to view the patient details from this screen. NFC card won't work on other screens.



Click on the icon on the top-right corner of the screen to view options related to the user account.

Clicking log out will sign you off from the session and redirect you to the log in page.



## Feedbacks

Feedbacks for improving DMS system, error reporting and additional comments can be sent. Press feedback icon on the top right corner next to the Search bar and fill up the form.

## Feedbacks

Name	<input type="text" value="Your Name"/>
Feedback Type	<div>Please Select ▼</div>
Feedback	<div><div>Your Feedback</div><div></div></div>
<div><div>Save</div><div>Cancel</div></div>	


## Events and Notices

Upcoming events and notices can be easily added to the dashboard. On the side bar scroll down, find **Events** and **Notice**. Click on them and fill up the form as required and post it on the dashboard.


NOTE: Every account holder can view this on their dashboard and could be super useful, so it should be properly utilized.

Add Events

Start Time



End time



Venue

Description

Add Event

List of Events

Start time	Venue	Description	End Date	Action
No data available in table				

Add Notice

From

Start Time

To

End Time

Description

Add Notice

List of Notice

Start time	Venue	Description	End Date	Action
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These messages will be posted for certain time only.**From** and **To** indicates start date and end date respectively of that message.

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# Create a New Patient

Click on the **Create New Patient** button on the top left of the screen as shown in the image below.

The screenshot shows a web application interface for creating a new patient. At the top, there is a blue header bar with a 'Create New Patient' button on the left and a search bar on the right. Below the header, a light blue bar contains the text 'Search or Add Patient'. The main form area is titled 'Who' and contains various input fields for patient information. The fields are organized into two columns. The left column includes: Name (with a dropdown), DOB (with a 'Date Converter' button), Sex (with a dropdown set to 'Unassigned'), Citizenship/Passport Number, Drivers License Number, Blood Group (with a dropdown set to 'Unassigned'), City, and Zone (with a dropdown set to 'Unassigned'). The right column includes: External ID, Mother's Name, Guardian's Name, Emergency Phone, Marital Status (with a dropdown set to 'Unassigned'), Address, District (with a dropdown set to 'Unassigned'), and Father's Name. Below the form fields, there is a list of checkboxes for additional information: Contact, Choices, Employer, Stats, and Misc. At the bottom of the form, there are two buttons: 'Search' and 'Create New Patient'.

Click on the checkbox as shown in the figure below to reveal its content and fill up the patient details and press **Create New Patient** on the bottom of the page. Note that entering the age of the patient will auto convert the patient's age. To use this facility simply type the age of the patient in the D.O.B section and focus-out (click somewhere else) to convert age into date in yyyy-mm-dd format as shown in the image below.

## Search or Add Patient

☒ Who

Name:	Mr. ▼ Alish <input type="text"/> Giri	External ID:	<input type="text"/>
DOB:	1991-05-25 <input type="button" value="Calendar"/> <input type="button" value="Date Converter"/>	Mother's Name:	<input type="text" value="Mother"/>
Sex:	Male ▼	Guardian's Name:	<input type="text" value="Guardian"/>
Citizenship/Passport Number:	<input type="text" value="12345"/>	Emergency Phone:	<input type="text" value="9841123456"/>
Drivers License Number:	<input type="text" value="12345"/>	Marital Status:	Single ▼
Blood Group:	O+ ▼	Address:	<input type="text" value="Kathmandu"/>
City:	<input type="text" value="Kathmandu"/>	District:	Kathmandu ▼
Zone:	Bagmati ▼	Father's Name:	<input type="text" value="Father"/>

☐ Contact

Checkbox (click here to reveal its content.)

☐ Choices

☒ Employer

Industry:	<input type="button" value="Add"/> Unassigned ▼	Occupation:	<input type="button" value="Add"/> Unassigned ▼
Employer Name:	<input type="text"/>	Employer Address:	<input type="text"/>
City:	<input type="text"/>	State:	<input type="button" value="Add"/> Unassigned ▼
Postal Code:	<input type="text"/>	Country:	<input type="button" value="Add"/> Unassigned ▼

☐ Stats

☐ Misc

Here,

- **Who** section contains primary details and if any mandatory field is missed out then a message will be displayed, and missing fields will be marked red.

192.168.88.250 says:

The following fields are required:

First Name  
Last Name  
DOB  
Sex

Please fill them in before continuing.

OK

Create New Patient Clear Active Patient Sure DOB

Search or Add Patient

Who

Name: [Redacted] [Redacted]

DOB: [Redacted] [Redacted]

Sex: Unassigned

Citizenship/Passport Number: [Redacted]

Drivers License Number: [Redacted]

Blood Group: Unassigned

City: [Redacted]

Zone: Unassigned

Address: [Redacted]

District: Unassigned

Father's Name: [Redacted]

Contact Choices Employer Stats Misc

Search Create New Patient

- **Contact:** This is the contact details of the patient.

Contact

Postal Code: 44600

Country: Nepal

Home Phone: 014253485

Mobile Phone: 9841256465

Trusted Email: example@example.com

County: Unassigned

Emergency Contact: 014265348

Work Phone: 014726548

Contact Email: example@email.com

- **Choices:** Patient's custom preferences.

Choices

Provider: Pankaj Awale

Referring Provider: Sachit Bhandari

Pharmacy: Godawari Pharmacy -- / God

HIPAA Notice Received: YES

Leave Message With: [Redacted]

Allow SMS: Unassigned

Allow Immunization Registry Use: Unassigned

Allow Health Information Exchange: Unassigned

Care Team: Unassigned

Allow Voice Message: Unassigned

Allow Mail Message: Unassigned

Allow Email: Unassigned

Allow Immunization Info Sharing: Unassigned

Allow Patient Portal: YES

CMS Portal Login: [Redacted]



- *Provider:* This is the Doctor.
- *Referring Provider:* Provider referring to another provider.
- *Pharmacy:* Pharmacy that patient prefers.
- *HIPAA Notice Received:* The HIPAA Privacy Rule mandates that health care providers distribute a Notice of Privacy Practices to all patients. The Notice of Privacy Practices also describes the HIPAA defined patient rights related to use and disclosure of the individual's health information.
- *Leave Message With:* Not Applicable.
- *Allow SMS:* Not Applicable.
- *Allow Immunization Registry Use:* Not Applicable.
- *Allow Health Information Exchange:* Not Applicable.
- *Care Team:* Not Applicable.
- *Allow Voice Message:* Not Applicable.
- *Allow Mail Message:* Not Applicable.
- *Allow Email:* Not Applicable.
- *Allow Immunization Info Sharing:* Not Applicable.
- *Allow Patient Portal:* This option determines whether to give patient access to the patient portal or not. This configuration will appear on [Patient Demographic](#) page on top, next to the patient's name.
- *CMS Portal Login:* Not Applicable.
- **Employer:** Current employer of the patient.

☒ **Employer**

<b>Industry:</b>	DOTMARK ▼	<b>Occupation:</b>	Unassigned ▼
<b>Employer Name:</b>	Dotmark	<b>Employer Address:</b>	Bhanimandal
<b>City:</b>	Lalitpur	<b>State:</b>	Unassigned ▼
<b>Postal Code:</b>	44700	<b>Country:</b>	Nepal ▼

- **Stats:** Full background of the patient.

☒ **Stats**

<b>Ethnicity:</b>	Unassigned ▼	<b>Race:</b>	Unassigned Indo + Mongoloid Mix Indo Aryan Race Tibetan/Tibeto Burman Race
<b>Family Size:</b>		<b>Financial Review Date:</b>	
<b>Monthly Income:</b>		<b>Homeless, etc.:</b>	
<b>Interpreter:</b>		<b>Migrant/Seasonal:</b>	
<b>Referral Source:</b>	Unassigned ▼	<b>VFC:</b>	Unassigned ▼
<b>Religion:</b>	Unassigned ▼		

- **Misc:** Deceased status of the patient.

☒ **Misc**

Date Deceased:  

Reason Deceased:

**NOTE:** Creating a new patient will first check if any existing patients matches the current detail of the patient, if non-item matches then click on Confirm Create New Patient.

Search or Add Patient

Hits	Name	External ID	DOB	Sex	Financial Review Date	Date Deceased	1 - 0 of 0
No matches were found.							

Confirm Create New Patient

- After creating new patient, you will be navigated to the **Patient Demographics** This page will contain all the personal information of the patient along with his/her appointments and medical reports (Future medical report of the newly created patient).

# Patient Demographics

The following image illustrates how a patient portal can be configured and assigned. To allow **Patient Portal** access must be given from the **Choices** section which has been explained in **Create New Patient** section above.

The screenshot displays the 'Patient Demographics' page for a patient named Alis Khadka. The page includes a navigation bar with links: History | Report | Documents | Transactions | Issues | Ledger | External Data. A red box highlights the 'Create Onsite Portal Credentials' button, with a note stating: 'Patient portal login detail can be configured here. This access must be given while new patient is created or can be edited from the demographics(Edit)'. Below the navigation bar, the 'Billing' section is collapsed, showing balance information: Patient Balance Due: 10.50, Insurance Balance Due: 0.00, and Total Balance Due: 10.50. The 'Demographics' section is expanded, showing tabs: Who, Contact, Choices, and Employer. The 'Choices' tab is selected, and a red box highlights it with a note: 'Editing can be done from here'. The 'Choices' section includes fields for Provider (Pankaj Awale), Referring Provider (Sanjib Dahal), Pharmacy (Godawari Pharmacy), HIPAA Notice Received (YES), Leave Message With, Allow SMS, Allow Immunization Registry Use, Allow Health Information Exchange, Care Team, Allow Voice Message, Allow Mail Message, Allow Email, Allow Immunization Info Sharing, Allow Patient Portal (YES), and CMS Portal Login. A modal window titled 'Generate Username And Password For Alis' is open, showing fields for User Name (Alis94), Password (y6@2#o), External ID (111200000067), and Pin (2301), with buttons for Change, Save, and Cancel. The 'Appointments' section is collapsed, showing 'None' and a note: '(Issues not authorized)'. The 'Tracks' section is expanded.

- This page enlists all the necessary information regarding the patient. All the future test results, charges and editing of the records can be managed from here.
- This page will be updated frequently with every visit the record history will be published here by the doctors or other responsible members.
- Any notes for that patient can be attached by clicking the **Notes** link and following the instructions (Click on the Patient name to come back to the demographics page).

Patient Demographics

Alis Khadka

Create Onsite Portal Credentials

History | Report | Documents | Transactions | Issues | Ledger | External Data

Billing (collapse)

Patient Balance Due : 450.00

Insurance Balance Due : 0.00

Total Balance Due : 450.00

Edit

 Demographics (expand)

Edit

 Notes (expand)

Edit

 Patient Reminders (expand)

Edit

 Disclosures (expand)

Edit

 Amendments (expand)

Labs (expand)

Add

 Appointments (collapse)

None

Edit

 Medical Problems (collapse)

diabetes

Edit

 Allergies (collapse)

iodine (hives)

Edit

 Medications (collapse)

Metformin

SAFOLIN CAP

"ADHESIVE 4""

Edit

 Surgeries (collapse)

- The links below the name of the patient, as shown in the image below, gives further details of the patient.
- **History:** Click history tab to view the following page. This section contains general history of the patient, family's medical history, relative's medical history, lifestyle habits and other details. Click on the edit button to add or edit any of the contents.

Patient History / Lifestyle

for Alis Khadka

Edit

Back To Patient

General

Family History

Relatives

Lifestyle

Other

Risk Factors:

Diabetes

Heart Disease

Depression

Allergies

Asthma

Exams/Tests:

Breast Exam

Abnormal

Cardiac Echo

Normal

Retinal Exam

Normal

Flu Vaccination

Abnormal

- **Report:** CCR as shown in the image below exchanges most relevant and timely clinical information about a patient among providers, institutions, or others. This has to be completed upon referral or transfer or other transition of a patient from one caregiver to another. To be completed by Physicians, Nurses, Ancillary providers (e.g., social work, physical therapy, occupational therapy). CCD is an electronic document exchange standard for sharing patient summary information. Summaries include the most commonly needed pertinent information about current and past health status in a form that can be shared by all computer applications, including web browsers, electronic medical record (EMR) and electronic health record (EHR) software systems.

## Add/Edit Patient Transaction

**Continuity of Care Record (CCR)** ←
   
 (Pop ups need to be enabled to see these reports)
   
☐ Use Date Range
   

Generate Report
 Download

---

**Continuity of Care Document (CCD)** ←
   
 (Pop ups need to be enabled to see these reports)
   

Generate Report
 Download

- **Documents:** Click Documents to upload images files of the test conducted like x-rays or a pdf file of some kind. Select a category and upload a files related to the subject to keep record of the active patient.

### Documents

Categories (Collapse all)

- Categories
  - Advance Directive
  - CCD
  - CCDA
  - CCR
  - Lab Report
  - Medical Record
  - XRay\_Neg
  - Patient Information
    - Patient ID card
    - Picture
    - Patient Photograph
  - Radiology
    - Image

Select a department here to upload images.

NOTE: Uploading files with duplicate names will cause the files to be automatically renamed (for example, file.jpg will become file.1.jpg). Filenames are considered unique per patient, not per category.

Upload Document to category 'Image'

Source File Path:  No file chosen (Multiple Files can be uploaded at one time by selecting them using CTRL+Click or SHIFT+Click.)

Optional Destination Name:

Download document template for this patient and visit

-- Select Template --

This section will be displayed after selecting a category on the left hand side.

- **Transactions:**
- **Issues:**

Medical Problems

Back

Add Medical Problems

Title	Begin	End	Coding (click for education)	Status	Occurrence	Referred By	Modify Date	Comments	Enc
diabetes	2018-01-22		ICD10:E08.00 (Diabetes mellitus due to underlying condition with hyperosmolality without nonketotic hyperglycemic-hyperosmolar coma (NKHHC) )	Active	Early Recurrence (<2 Mo)		2018-01-23 11:21:10		1

Add Allergies

Title	Begin	End	Coding (click for education)	Status	Occurrence	Reaction	Referred By	Modify Date	Comments	Enc
iodine	2017-09-26		ICD10:E00.1 (Congenital iodine-deficiency syndrome, myxedematous type )	Active	Chronic/Recurrent	Hives		2018-01-23 11:21:54		1

Add Medications

Title	Begin	End	Coding (click for education)	Status	Occurrence	Referred By	Modify Date	Comments	Enc
Metformin	2003-06-17		ICD10:C54.2 (Malignant neoplasm of myometrium )	Active	Acute on Chronic		2018-01-23 11:22:36		1
SAFOLIN CAP	2018-01-23			Active	Unknown or N/A		2018-01-23 11:30:23		1

- **Ledger:** Front office do not have access to this option.
- **External Data:**



# Searching an Existing Patient

Patients search can be done from the search bar or the create new patient page as shown in the image below.

Menu Home Create New Patient

[Help] 1 - 0 of

Name	Sex	Phone	Citizenship/Passport number	DOB	ID	PID	Number Of Encounters	Days Since Last Encounter	Date of Last Encounter
Alis Khadka	Male	9841805893	78596	23/01/1993	111100000010	10	2	2	23/01/2018

Search found for alis.

Create New Patient Clear Active Patient Alish Giri (111200000011) DOB: 1991-05-25 Age: 28yrs Encounter History Search

Search or Add Patient

Who

Name: A External ID:   
DOB:   
Sex: Unassigned   
Citizenship/Passport Number:   
Drivers License Number:   
Blood Group: Unassigned   
City:   
Zone: Unassigned   
Mother's Name:   
Guardian's Name:   
Emergency Phone:   
Marital Status: Unassigned   
Address:   
District: Unassigned   
Father's Name:   
Contact   
Choices   
Employer   
Stats   
Misc   
Search Create New Patient

Matching patients will be displayed whos name contains letter 'A'.

After selecting a patient, A button will appear at the top of the page called active patient. This will stay active until it is cleared using the **Clear Active Patient** button as shown in the image below.

Menu Home Create New Patient Clear Active Patient Alis Khadka (111200000067) DOB: 1993-01-23 Age: 25yrs Encounter History Search

Patient Demographics

Alis Khadka Create Onsite Portal Credentials

History | Report | Documents | Transactions | Issues | Ledger | External Data

Billing (collapse)

Patient Balance Due : 10.50   
Insurance Balance Due : 0.00   
Total Balance Due : 10.50

click here to clear active patient.

Active patient. Click here from anywhere to navigate back to this page.

Appointments (collapse)   
None   
(Issues not authorized)   
Tracks (expand)

Demographics (expand)   
Notes (expand)   
Disclosures (expand)   
Amendments (expand)   
Labs (expand)

## Encounters

Encounter history stores all the active patient visits in the past.

Note: Make sure to select a patient to make this section visible. This patient will be an active patient in the DMS system until the **Clear Active Patient** button is pressed.



**New Encounter** will display the following form. This encounter will be created for the active patient i.e. Alis Khadka, as shown in the image below. Please fill in the details as required and save it for future reference.

The screenshot shows the 'New Encounter Form' for Alis Khadka. The form includes fields for 'Visit Category', 'Facility', 'Billing Facility', 'Sensitivity', 'Date of Service', and 'Onset/hosp. date'. A list of medical issues is displayed on the right, including 'A: 2017-09-26 Iodine', 'D: 2015-01-27 Broken molar teeth', 'P: 2018-01-22 diabetes', 'M: 2003-06-17 Metformin', 'M: 2018-01-23 SAFOLIN CAP', 'M: 2018-01-23 "ADHESIVE 4"', and 'S: 2015-01-20 appendectomy'.

All the past encounters of the active patient will be displayed in this section. The following patient just have one encounter.

The screenshot shows the 'Past Encounters and Documents' section for Alis Khadka. The table displays a list of past encounters with columns for Date, Issue, Reason/Form, Provider, Coding, and Insurance.

Date	Issue	Reason/Form	Provider	Coding	Insurance
23/01/2018				Registration - REG01	23/01/2018
23/01/2018	A: Iodine D: Broken molar teeth P: diabetes M: Metformin M: SAFOLIN CAP M: "ADHESIVE 4" S: appendectomy		Poudyal, Bishesh	Appointment - 111100000003	23/01/2018

Active patient's encounter history will be displayed as a list in this dropdown as shown in the image below.



Create New Patient

Clear Active Patient

Alis Khadka (111100000010)  
DOB: 23/01/1993 Age: 25yrs

Encounter History

Encounter History

New Encounter

Past Encounter List

23/01/2018-New Patient

23/01/2018-Established Patient

alis

Patient Demographics

Alis Khadka

Create Onsite Portal Credentials

History | Report | Documents | Transactions | Issues | Ledger | External Data

Billing (collapse)

Patient Balance Due : 450.00

Insurance Balance Due : 0.00

Total Balance Due : 450.00

Encounter history list.

Add

Appointments (collapse)

None

Edit

Medical Problems (collapse)

# Creating/Editing Appointments

Click on the add button to create an appointment as shown in the image below.

Patient Demographics

Alis Khadka

Create Onsite Portal Credentials

History | Report | Documents | Transactions | Issues | Ledger | External Data

Billing (collapse)

Patient Balance Due : 10.50

Insurance Balance Due : 0.00

Total Balance Due : 10.50

Edit

Demographics (expand)

Edit

Notes (expand)

Edit

Disclosures (expand)

Edit

Amendments (expand)

Labs (expand)

Add

Appointments (collapse)

None

(Issues not authorized)

Tracks (expand)

Fill up the form, find the available date and press save.

Add Appointment

Return to Calendar

Patient

Category:

New Patient

All day event

Date:

2018-02-16

Time

3

:

00

AM

Title:

New Patient

duration

30

minutes

Facility:

ER Department

Billing Facility:

ER Department

Patient:

Alis Khadka

Provider:

Pankaj Awale

Status:

- None

Room Number:

Comments:

Save

Find Available

Cancel

# Dashboard

## Calendar

Select date and department (from the dropdown, below Providers) to view all the appointments of the Doctors. You can also create appointments by clicking on the time displayed as shown in the image below. On clicking on time, it will navigate user to the create new appointment page.

The screenshot displays a medical appointment calendar. At the top, there are buttons for 'Add', 'Today', navigation arrows, the date 'Sunday, February 25, 2018', and buttons for 'Refresh', 'Day', 'Week', and 'Month'. Below these, a calendar for February is shown. To the right of the calendar is a dropdown menu for 'Providers' with the following options: 'General Phys', 'Pankaj Awale', 'Bidesh Bista', 'Dhurba Gaire', and 'Philip Ranjit'. A red box highlights the 'Providers' dropdown, and a red arrow points to it with the text 'Select provider from here'. The main area of the calendar is a grid with columns for each provider and rows for each time slot from 8:00 to 9:40. An appointment is visible for Philip Ranjit at 08:45, labeled 'Alis Khadka(Established Patient)'.

## Quick Order

Fill up the form as shown in the image below. Select required test (Eg: Laboratory or Radiology) from the list, search the test code and press **Save**. This will create procedure order for that patient with the selected provider.

Instant Procedure Order

Search Patient :

Name :

Middle Name :

DOB :

Sex :

Home Phone :

Mobile Phone :

Emergency Phone :

Contact Email :

Zone :

District :

Priority :

Status :

Clinical History :

Procedure Type :

Laboratory Test :

Diagnosis Codes :

**Search Code**

For:  Search by:

**Click here**

## Doctor

This will list all the Doctors with their availability status. Select date to view list of Doctors for that date with their on-duty status.

Today <input type="button" value="←"/> <input type="button" value="→"/> Sunday, Feb 25, 2018 <input type="button" value="Calendar"/>					On Duty Doctors
Full Name	Role	Time From	Time To	Facility	
Philip Shyam Ranjit	Physicians	08:00:00	-	General Physician	

## Patient

It shows list of all patients.

## Resources

The Available resources are shown in Resource Availability table. You can add reservation if you want to reserve any wards.

Dashboard Schedule Application Management Reports

**Announcements** 0

There are no announcements

**Upcoming Reservations** 0

You have no upcoming reservations

**Resource Availability**

**Available**  
Default

General ward  
radiology  
General Bed(2)

There are no upcoming reservations in next 30 days  
There are no upcoming reservations in next 30 days  
There are no upcoming reservations in next 30 days

**Reserve**  
**Reserve**  
**Reserve**

**Unavailable**  
Default  
None

**Unavailable All Day**  
Default  
None

**All Upcoming Reservations** 0

Activate Windows  
Go to Settings to activate Windows

Fill in the necessary fields to add a reservation.

Dashboard Schedule Application Management Reports

**New Reservation**

Administrator Administrator () Change

**Rooms** Change  
General ward

**Accessories** Add

**Begin** 11/21/2017 4:45 PM  
**End** 11/21/2017 5:15 PM  
Reservation Length 0 days 0 hours 30 minutes

**Repeat** Does Not Repeat

**Title of reservation**

**Description of reservation**

**Patient Name**  
Add name or email

**Invitees**  
Add name or email | Doctor And Nurse

**Cancel** **Create**

Activate Windows  
Go to Settings to activate Windows

The reservations are displayed on the Resource Availability, in the Resource section.

Dashboard
Schedule
Application Management
Reports

Upcoming Reservations 1

Today (1)

VIP reservation	Administrator Administrator	Tue, 11/21 4:45 PM	Tue, 11/21 5:15 PM	General ward
-----------------	--------------------------------	--------------------	--------------------	--------------

Tomorrow (0)

Later This Week (0)

Next Week (0)

Resource Availability

Available

Default

General ward

radiology

General Bed(2)

Available Until Tue, 11/21 4:45 PM

There are no upcoming reservations in next 30 days

There are no upcoming reservations in next 30 days

Reserve

Reserve

Reserve

Unavailable

Default

Activate Windows

Go to Settings to activate Windows.

## Department

This will list all the different departments in the hospital along with number of doctors and nurses present in them.

ER Department 0 0	Dental 0 0	Pediatric 0 0	General Surgery 0 0
General Physician 1 0	ENT 0 0	Orthopedic 0 0	Gynecologist 0 0
Dermatologist 0 0	Psychiatrist (Neuro) 0 0	Cardiologist 0 0	Eyes Specialist 0 0
Neuropsychiatrist 0 0	Plastic Surgeon 0 0	MBBS 0 0	Endocrinologists 0 0
General Physician & Pulmonology 0 0	Radiologist 0 0	Psychiatrist 0 0	MD General Physician 0 0

# Calendar

This section is described in the dashboard section above.

## Patient/Client

### Patient

This shows the list of all patients.

### New/Search

Create a new patient or search existing patient as described in the **General** section above.

### Summary

This will be visible once a patient is selected. Summary will display the patient's demographic page which has been explained above.

Patient Demographics

Alis Khadka

Create Onsite Portal Credentials

History | Report | Documents | Transactions | Issues | Ledger | External Data

Billing (collapse)

Patient Balance Due : 369.07

Insurance Balance Due : 0.00

Total Balance Due : 369.07

Edit

Demographics (expand)

Edit

Notes (expand)

Edit

Disclosures (expand)

Edit

Amendments (expand)

Labs (expand)

Add

Appointments (collapse)

2018-02-25 (Sun)

8:45 am ( - )

Established Patient

Philip Ranjit

2018-02-27 (Tue)

4:20 pm ( x )

Established Patient

Philip Ranjit

(Issues not authorized)

Tracks (expand)

### Records

Patient Record Request will simple record the request of the patient.

### Patient Education

Search any information on the web from here.

Web Search - Patient Education Materials

Search in  

Please input search criteria above, and click Submit to view results. (Results will be displayed in a pop up window)

## Chart Tracker

Track patients with this function. Enter the **Patient ID** to view the information.



# Message

History of sent messages will be displayed here with details like from, patient, type, date and status. Click Add New to create message and send it to the respective patient.

Message and Reminder Center

Reminders

Show Reminders

Messages (See All)

Show All | Show Active | Show Inactive

From	Patient	Type	Date	Status
Administrator Administrator	Alish Giri	Bill/Collect	2017-12-19	New

Add NewDelete

<< 1 of 1 >>

Message and Reminder Center

Reminders

Show Reminders

Messages (See All)

Type: Unassigned Patient: Click to select Status: New

To: Select Users From The Dropdown List Select User

Type message here

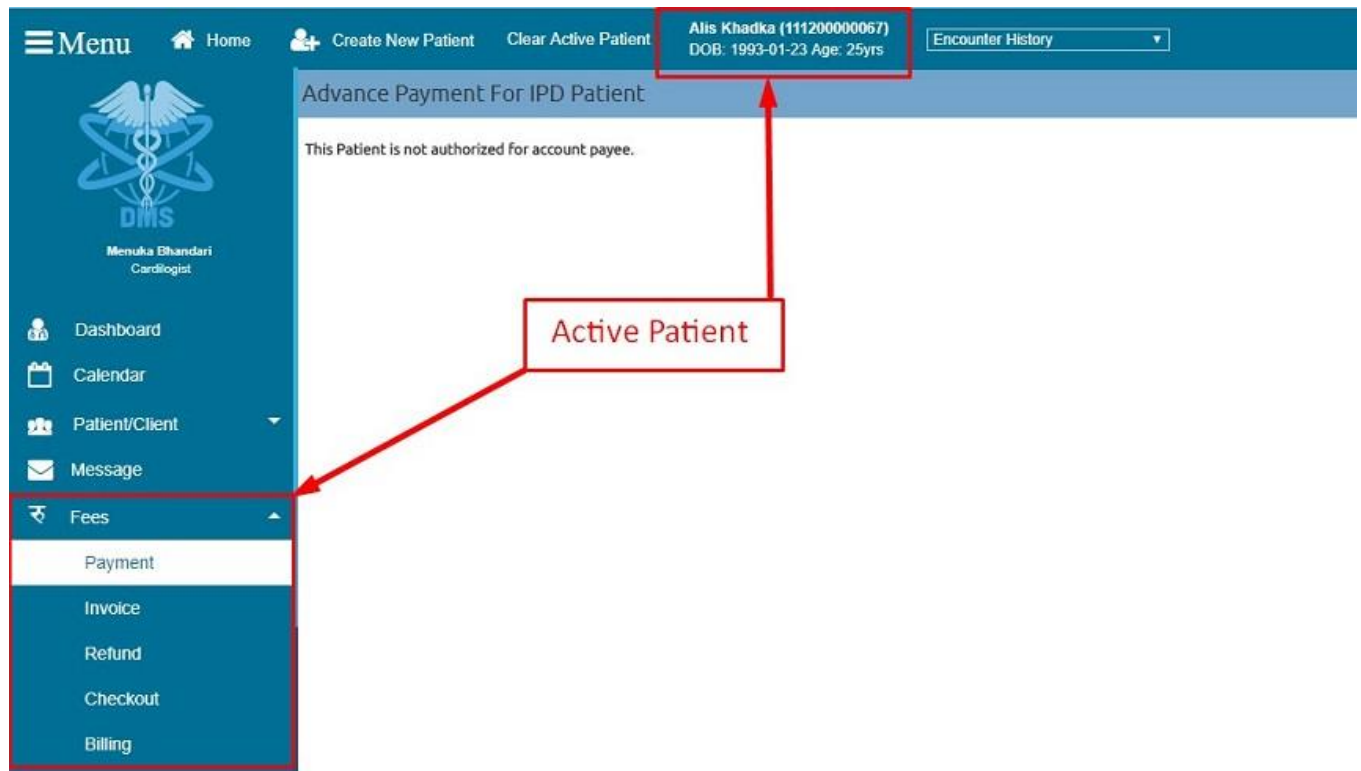
Send messageCancel

# Fees

**Note:** Payment, Invoice, Refund and Checkout will only be visible when there is an **Active Patient** running in the system. In other words, user must select a patient to deal with the payments related role.

## Payment

Payment can only be used for IPD patients.



## Invoice

- Invoice stores all the payment history of a patient. Payment is done through the checkout section below.
- Invoice can be reprinted from here.
- Invoice id is used in the refund.

Invoice							
Invoice Id	Fiscal Year	Date	Action	Sub Total	Tax	Discount Amount	Total
109	2073.74	2018-03-20		100.00	13.00	0.00	113.00

Billing Invoice						
INVOICE						
SN.	Date	Code	Description	Qty	Rate	Amount
1	2018-02-27	ham-pltlt1	Platelets	1	100.00	100.00
Sub-Total						100.00
Discount (0.00%)						0.00
VAT(13%)						13.00
Rounding						0.00
Total Amount						113.00
Payment Type						Cash ▼
Paid Amount						120.00
Change Amount						7.00

Back Re-print

## Refund

Please make note of the **Bill Number** , displayed in the image below.

Bill number will be displayed in the receipt of the patient.

Print

Total: 1 sheet of paper

Print Cancel

Destination: Microsoft XPS Docu...  
Change...

Pages: All  
e.g. 1-5, 8, 11-13

Layout: Portrait

Color: Color

Suryabinayak Pharmacy  
Suryabinayak, Kathmandu, Bagmati, Nepal  
9820000001  
PAN :123789456



### INVOICE

Patient Name:	Cash Two	Transaction Date:	20/03/2018 00:00:00
Patient ID:	111200000162	Billing Number:	2073.74/35
Sex:	Other		
PAN:			
Address:	Sanepa		

Method of Payment: Check Payment/Cash/Credit Card/Account Payee

S.N.	Description	Batch No.	Expiry	Qty	Rate	Amount
1	Paracetamol (100 mg)	234	Mar - 2018	2	80	160
Print By : Pharmacy 22/03/2018 04:40:45 #: - 4 Copy of Original						Sub Total 160.00 Discount 0% 0.00

- Enter the bill number and click **Submit**. The following screen will be displayed for the full refund. Partial refund is not allowed.
- Press **Refund** to proceed with the process. Please note that refund requires authorization from managers or supervisors or any authorized person.

**Billing Sheet**

Invoice Id: 2073.74/109 Submit Invoice: 109 Date: 2018-03-20 Tax Rate: 13 % Discount: Rs. 0.00 Discount Rate: 0 %

Type	Item Name	Description	Qty	Rate	Paid Amount
Procedure Order	Platelets	ham-pltlt1 charge	1	100.00	113.00
Payment Method: cash				Return Amount	113.00

Refund

**Billing Sheet**

Invoice Id: 2073.74/109 Submit

Cancel Item ✕

Authorized By:

Password:

Reason \*

Refund
Close

Type	Item Name	Rate	Paid Amount
Procedure Order	Platelets	100.00	113.00
Payment Method: cash		amount	113.00

Refund

## Checkout

- It keeps record of all the unpaid bills of the patient selected.
- The encounter option shows all the patient's visits and the amount that had/has been charged during the encounter. Please select an encounter and press **Pay** to proceed with the payment.
- Also note that patient's PAN or VAT can also be submitted with payment process. PAN or VAT id should be alphanumeric and 9-digit long.

**Checkout**

Encounter: 2018-02-04-New Patient ▼ Add Item  Quantity  Add Item

Select encounter

2018-02-27-Established Patient

2018-02-04-New Patient

Date	Item Name	Description	Quantity	Price	Tax	Sub Total
2018-02-04	Registration	REG01 Patient Registration	1	10.00	15	11.50
<b>Total</b>						<b>11.50</b>

Customer PAN/VAT:

Pay

- In addition, any additional item/items used by the patient can be added through the **Add Item** button as shown in the figure below.
- To remove an item, click on it and press delete. User can also update the item.
- To update, change the item and quantity and press **Update Item**.

**Checkout**

Encounter: 2018-02-27-Office Visit Add Item: Suture(2-3) Quantity: 2

Cancel Delete Item Update Item

SN.	Type	Code	Item Name	Description	Quantity	Price	Tax	Sub Total
1	items	1112000010	Suture(2-3)	1112000010 charge	2	150.00	5	315.00
2	Procedure Order	ham-pltlt1	Platelets	ham-pltlt1 charge	1	100.00	5	105.00
<b>Total</b>								<b>420.00</b>

Customer PAN/VAT:

Pay

Clicking on an item will display these buttons

- Notice the tax difference. In case of tax difference payment has to be done separately.

**Checkout**

Encounter: 2018-02-04-New Patient Add Item: Corn Removal ( small) Quantity: 1

Add Item

Date	Type	Code	Item Name	Description	Quantity	Price	Tax	Sub Total
2018-02-08	items	1112000032	Corn Removal ( small)	1112000032 charge	1	400.00	5	420.00
2018-02-04	Registration	REG01	Patient Registration	Patient Registration	1	10.00	15	11.50
<b>Total</b>								<b>431.50</b>

Customer PAN/VAT:

Pay

- You can add notes to the payment. Make it private or public as situation demands.
- Give discounts if any. Discounts can be given in Percentage only. Also note that if the total amount at decimal is less than or greater than 0.5 then it will be rounded to the nearest value. Therefore, the total amount will only be in 1.0 or 1.5 or 2 but not in between.
- Press save to proceed with the payment.

Invoice							
Invoice Id	Fiscal Year	Date	Action	Sub Total	Tax	Discount Amount	Total
109	2073.74	2018-03-20	Show Returned Invoice	100.00	13.00	0.00	113.00

**Note:** Please make note of the bill number which is made up of *fiscal year/invoice id*. Invoice id will be used if patient requests a refund.

## Billing Sheet

Check	Code	Description	Qty	Rate	Amount
<input checked="" type="checkbox"/>	bcm-amyl1	Amylase	1	334.00	334.00

Notes :

Add notes here, if any.

Is Private ☒ Yes ☐ No

Sub-Total	334.00
Discount (%) <input type="text" value="00"/>	0.00
Taxable Amount	334.00
VAT (13%)	43.42
Rounding	-0.42
Total Amount	377.00
Payment Type	<input type="text" value="Cash"/>
Paid Amount	<input type="text" value="500"/>
Change Amount	123.00

Save

Save and Print

# Report

## Audit Trial

This is the activity log. All the information regarding invoices, refunds and changes in any price can be found here.

Activity can be viewed by selecting a date range, user and type of module. Press **Submit** to view the activity logs.

Report - Audit Trial

From: 2018-02-26 To: 2018-03-18 User: -- All Users -- Module: -- All Module --

Submit

-- All Module --  
All Modules  
invoice  
refund  
Pharmacy Invoice  
Pharmacy Refund  
EMR Invoice  
EMR Refund

The logs can be printed as well as export in an Excel format.

Report - Audit Trial

From: 2018-02-26 To: 2018-03-18 User: -- All Users -- Module: invoice

Submit Print CSV Export

Date & Time	User	Module	Action	Details
14/03/2018 02:39	Administrator Administrator	invoice	insert	170.00
14/03/2018 02:37	Administrator Administrator	invoice	insert	158.00
14/03/2018 02:36	Administrator Administrator	invoice	insert	315.00
14/03/2018 02:34	Administrator Administrator	invoice	insert	299.00
13/03/2018 03:19	Administrator Administrator	invoice	insert	399.00
13/03/2018 03:18	Administrator Administrator	invoice	insert	351.00
13/03/2018 03:15	Administrator Administrator	invoice	insert	105.00

## Billing

### EHS Billing

#### Cash Register

- Cash register contains records of cash history of the logged in user.
- The **Type** option will show three options, initial amount, closing amount and collection.
- *Initial amount* is the amount that the counter contains at the user arrival time. As soon as a user starts his/her shift the amount in the till should be entered using this option.
- Click on submit and enter your username and password. Please note that any user can log in and enter any type with any amount.

Report - Cash Register

Cash Register :

Collapse

Type:

Initial Amount

Amount:

10000

Submit

Date	User	Type	Amount

- After submitting the data and entering the username and password, the following screen will be displayed.

Report - Cash Register			
Cash Register :		Expand	
Date	User	Type	Amount
2018-02-12	Menuka Bhandari	Initial Amount	10000
2018-02-12	Menuka Bhandari	Shortfall	-10000.00

- Now if a manager, supervisor or a person in charge comes to collect money off the till then the **Collection** option type should be selected to enter the amount.
- In this case, the collection is taken while Menuka is logged in so, this cash collection will be stored in Menuka's account as shown in the image below.

Report - Cash Register			
Cash Register :		Expand	
Date	User	Type	Amount
2018-02-12	Menuka Bhandari	Initial Amount	10000
2018-02-12	→ Menuka Bhandari	→ Collection	-3000
2018-02-12	→ Menuka Bhandari	→ Collection	-2000
2018-02-12	Menuka Bhandari	Shortfall	-5000.00

**NOTE:** While entering username and password any user can enter his/her log in information. However, the **Amount** and its **Type** record will be stored in the logged in user, Menuka in this case as shown in the image below.



**Report - Cash Register**

Cash Register : Collapse

Type: Collection Amount: 2000 Submit

**Confirm** ×

Are you sure? Please provide your password

Username Manoj

Password \*\*\*\*\*

Yes Cancel

Date			Amount
2018-02-12			10000
2018-02-12	Menuka Bhandari	Collection	-3000
2018-02-12	Menuka Bhandari	Collection	-2000
2018-02-12	Menuka Bhandari	Shortfall	-5000.00

- The **Closing Amount** is the remaining amount in the till at the end of a user shift.

## Pharmacy Billing

### Cash Register

This is the same as in EHS Billing. Please refer to that above.

### Sales Book

This shows all the invoices that are dealt with in the provided time frame.

Report - Pharmacy Sales Book

From: 2018-02-26

To: 2018-03-19

Submit

Print

CSV Export

Invoice				Total Sales	Non Taxable Sales	Export Sales	Discount	Taxable Sales	
Date	Bill No.	Buyer's Name	Buyer's PAN Number					Amount	Tax(Rs)
15/03/2018	1	Surendra Long	123456789	549	129.3		0	400	20
15/03/2018	2	Surendra Long		420	0		0	400	20
15/03/2018	3	Surendra Long		672	0		0	640	32
15/03/2018	4	Surendra Long		399	0		20	380	19
15/03/2018	5	Surendra Long	123457987	410	0		10	390	19.5
15/03/2018	6	Surendra Long	123456789	410	0		10	390	19.5
15/03/2018	7	Hari Ram		420	0		0	400	20
15/03/2018	8	Nabina Gurung	125478598	18870	18423.153		1097	425.25	21.26
15/03/2018	9	Robin Tamang	985623568	9732	9731.627		403.37	0	0
15/03/2018	10	Hari Ram	123456789	408	0		11	389	19.45
15/03/2018	11	Robin Tamang		4054	4054		0	0	0
15/03/2018	12	Surendra Long	123456789	408	0		11	389	19.45
Total Amount				36752	32338.08		1562.37	4203.25	210.16

## Sales Refund

This shows all the refunds that are given in the provided time frame.

Report - Pharmacy Sales Refund

From: 2018-03-05

To: 2018-03-19

Submit

Print

CSV Export

Invoice					Total Refund
Date	Credit Note No.	Bill No.	Buyer's Name	Buyer's PAN Number	
Total Amount					

Please refer to the [Cash Register](#) section on the EHS billing.

# Radiology

## Configuration

Types of Radiology Orders and Results

Configuration   Group Orders   Radiology Test Method

Name	Order	Code	Description	
+ Body			Body	[Edit] [Add]
+ Head			Head	[Edit] [Add]
+ Lower Extremities			Lower Extremities	[Edit] [Add]
+ Spine			Spine	[Edit] [Add]
+ Upper Extremities			Upper Extremities	[Edit] [Add]

Add Top Level

- Configuration controls all the tests that the Hospital conducts internally or externally.
- These tests can be categorized into groups, radiology order or other as required. Different topics will have different forms and their contents.
- Press **Add Top Level** to add new test as shown in the image below.

Add / Edit

Procedure Type: ▼

Name:

Description:

Sequence:

Group

Procedure Order

Discrete Result

Recommendation

Order Group

Save Cancel

Selecting **Group** shows the following form. Enter details and press save.

Add / Edit

Procedure Type: Group ▼

Name: Blood Group

Description: Description of blood group.

Sequence: 0

Save Cancel

Selecting Radiology order from the list shown above shows the following form. Fill the form to add related item.

Add / Edit

Radiology Type:

Radiology Order ▼

Name:

Body

Description:

Body

Sequence:

0

Order From:

Radiology ▼

Identifying Code:

Standard Code:

Laterality:

Unassigned ▼

Taxes:

☐ HST
☐ TINC
☒ VAT

Is Refundable:

☐

Fee:

Save

Delete

Cancel

This will save the file in the **Configuration** page. You can also edit this group or add different tests in this group using the **Add** button.

Types of Orders and Results				
Configuration    Group Orders    Lab Test Method				
Name	Order	Code	Description	
+ Biochemistry			Biochemistry	[Edit] [Add]
Blood Group			Description of blood group.	[Edit] [Add]
+ Haematology			Haematology	[Edit] [Add]
+ Immunology			Immunology	[Edit] [Add]
+ Microbiology			Microbiology	[Edit] [Add]
+ Parasitology			pst-logy	[Edit] [Add]
test1		Local Hospital Code	Description of the this test.	[Edit] [Add]

Add Top Level

Edit group or  
Add different tests to that group.

## Events

This topic is described in the Introduction section.

## Notice

This topic is described in the Introduction section.

## My Account

### Password

Change your password here.

#### Password Change

Have you forgotten your password ? Please choose a new one here.

Full Name :	Bishesh Poudyal
Username :	bishesh
Current Password :	<input type="password"/>
New Password :	<input type="password"/>
Repeat New Password :	<input type="password"/>

Save

Customize your password here.

### Authorizations

### Address Book

Most of the details of different departments in the hospital will be stored here.

### Office Notes:

Any users can add notes here. These notes will be stored here, and anyone can come here and view these notes.

### Configure Tracks

Doctors update this section to keep records of varieties of tests like blood pressure test in different timings, its normal state for person of certain type and other in-depth details for other members to view. These records will be stored in the encounter history. Accessing this information from the **Encounters**, graph of that record will be displayed. This graph also can be printed if required.

# About Us

Provides information about DMS.