SKIDS Advanced - Non-IT Team User Manual

Comprehensive Training Guide for Healthcare & Administrative Staff

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GETTING STARTED

Accessing the Platform

Step 1: Open Your Web Browser

- Use Chrome, Firefox, Safari, or Edge
- Go to: **https://app.skids.clinic** (Production)
- Or: **http://localhost:3001** (Development/Training)

Step 2: Login Process

1. **Enter your credentials** provided by your administrator
2. **Select your role** from the dropdown menu
3. **Click "Sign In"** to access the platform

Step 3: First-Time Setup

- **Complete your profile** with required information
- **Set up notifications** preferences
- **Review your dashboard** and available features

Training Account Access

For training purposes, use these test accounts:

Role	Username	Password	Access Level
Admin	admin@skids.clinic	Admin123!	Full system access

Vendor Manager	vendor.manager@skids.clinic	VM123!	Vendor management
Staff Member	staff@skids.clinic	Staff123!	Daily operations
Analytics Specialist	analytics@skids.clinic	Analytics123!	Reports & insights

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PLATFORM OVERVIEW

Main Navigation

The platform has **6 main sections** accessible from the top navigation bar:

1. **Home**: Platform overview and quick access
2. **Discovery**: Interactive health education journeys
3. **Interventions**: Specialized health programs
4. ⚕ **Specialists**: Our medical team directory
5. **Care Plans**: Patient care management
6. **Analytics**: Performance and insights dashboard

Dashboard Layout

Each page follows a consistent layout:

- **Header**: Navigation, user profile, notifications
- **Sidebar**: Quick actions and filters (when applicable)
- **Main Content**: Primary information and tools
- **Chat Support**: Dr. SKIDS AI assistant (bottom right)

USER ROLES & PERMISSIONS

Role-Based Access Control

Administrator

Full system access including:

- All vendor management functions
- Staff management and performance tracking
- Complete analytics and reporting
- System configuration and settings
- Financial data and ROI analysis

Vendor Manager

Vendor-focused responsibilities:

- Vendor onboarding and approval
- Performance monitoring and reviews
- Contract management
- Vendor communication and support
- Staff management (view only)
- Financial configuration

Staff Member

Daily operational tasks:

- Care plan management
- Patient interaction and support
- Basic reporting and metrics
- Educational content management
- Vendor management
- Staff performance reviews

Analytics Specialist

Data and insights focus:

- Advanced analytics and reporting
- Performance trend analysis
- ROI calculations and forecasting
- Dashboard customization
- Vendor onboarding
- Staff management

ANALYTICS DASHBOARD

Accessing Analytics

1. **Click "Analytics"** in the main navigation
2. **Select your view** from the available tabs:
    - **Overview**: High-level platform metrics
    - **Vendors**: Vendor performance and analytics
    - **Staff**: Team productivity and performance
    - **System**: Technical health and uptime
    - **ROI**: Financial analysis and returns
    - **Predictive**: AI-powered insights and forecasts

Understanding Key Metrics

Real-Time System Metrics (Top Bar)

- **Active Users**: Current users on the platform
- **Transactions**: Payment and subscription activities
- ⚙ **System Load**: Platform performance indicator
- 🌐 **API Calls**: System integration activity
- ⚠ **Errors**: System issues requiring attention
- ⚡ **Response Time**: Platform speed (target: <2 seconds)

Performance Indicators

- **Green**: Excellent performance (target met/exceeded)
- **Yellow**: Good performance (within acceptable range)
- **Red**: Poor performance (requires attention)

Reading Analytics Reports

Vendor Performance Tab

1. **Top Performers**: Best-performing vendor partners
2. **Performance Distribution**: Overall vendor quality spread
3. **Integration Health**: Technical integration status
4. **Compliance Status**: Regulatory compliance tracking

Staff Productivity Tab

1. **Individual Metrics**: Personal performance indicators
2. **Department Performance**: Team-level analytics
3. **Workload Distribution**: Task allocation and capacity
4. **Training Needs**: Skill development requirements

Auto-Refresh Feature

- **Toggle auto-refresh** using the button in the top-right
- **Data updates every 30 seconds** when enabled
- **Manual refresh** available anytime with the refresh button

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VENDOR MANAGEMENT

Vendor Onboarding Process

Step 1: Initial Application

1. **Navigate to** "Admin" → "Vendor Management"
2. **Click "Add New Vendor"** button
3. **Fill in basic information**:
    - Company name and contact details
    - Service type and specialization
    - Primary contact person

Step 2: Documentation Review

1. **Upload required documents**:
    - Business registration
    - Professional certifications
    - Insurance certificates
    - HIPAA compliance documentation
2. **Review and verify** all submitted documents
3. **Request additional information** if needed

Step 3: Technical Integration

1. **API integration setup** (handled by technical team)
2. **Test environment configuration**

3. **Security and compliance verification**
4. **Performance benchmarking**

Step 4: Approval and Activation

1. **Final review** by vendor management team
2. **Approval decision** and notification
3. **Account activation** and access provisioning
4. **Welcome package** and onboarding materials

Monitoring Vendor Performance

Performance Metrics Dashboard

- ☆ **Overall Rating**: Composite performance score (1-5 stars)
- ⏱ **Response Time**: Average response to requests
- **Completion Rate**: Successful task completion percentage
- **Customer Satisfaction**: User feedback scores
- **Trend Indicator**: Performance improvement/decline

Monthly Performance Reviews

1. **Generate performance reports** automatically
2. **Schedule review meetings** with underperforming vendors
3. **Document improvement plans** and timelines
4. **Track progress** against established KPIs

Vendor Communication

Communication Channels

- **Email Integration**: Automated notifications and updates
- **In-Platform Messaging**: Direct communication tools
- **Scheduled Calls**: Regular check-ins and reviews
- **Support Tickets**: Issue tracking and resolution

STAFF MANAGEMENT

Team Overview

Staff Dashboard Features

1. **Team Directory**: Complete staff listing with roles
2. **Performance Metrics**: Individual and team KPIs
3. **Workload Management**: Task distribution and capacity
4. **Training Tracker**: Skill development progress

Performance Tracking

Key Performance Indicators (KPIs)

- Tasks Completed**: Daily/weekly task completion
- ⏱ **Response Time**: Average response to requests
- **Vendors Managed**: Number of vendor relationships
- ☆ **Performance Rating**: Overall performance score (1-5)
- **Efficiency Score**: Productivity measurement

Performance Review Process

1. **Daily Check-ins**: Brief status updates and priorities
2. **Weekly Reviews**: Detailed performance analysis
3. **Monthly Assessments**: Comprehensive evaluation
4. **Quarterly Planning**: Goal setting and development plans

Goal Setting and KRAs

Setting SMART Goals

- **Specific**: Clear, well-defined objectives
- **Measurable**: Quantifiable success metrics
- **Achievable**: Realistic and attainable targets
- **Relevant**: Aligned with business objectives
- **Time-bound**: Clear deadlines and milestones

Tracking Progress

1. **Real-time updates** on goal completion
2. **Visual progress indicators** and charts
3. **Automated alerts** for missed deadlines
4. **Achievement celebrations** and recognition

CARE PLANS MANAGEMENT

Creating Care Plans

Step 1: Patient Assessment

1. **Gather patient information**:
   - Age, medical history, current concerns
   - Developmental milestones and assessments
   - Family preferences and goals
2. **Select appropriate interventions** based on needs
3. **Choose subscription tier** (Essential/Comprehensive/Premium)

Step 2: Plan Customization

1. **AI-powered recommendations** based on assessment
2. **Manual adjustments** by healthcare providers
3. **Family input** and preference integration
4. **Timeline and milestone setting**

Step 3: Implementation

1. **Plan activation** and family notification
2. **Resource allocation** and scheduling
3. **Progress tracking** setup
4. **Communication plan** establishment

Monitoring Progress

Progress Tracking Tools

- **Milestone Tracker**: Visual progress indicators
- **Outcome Metrics**: Quantifiable improvement measures
- **Progress Notes**: Detailed observations and updates
- **Photo Documentation**: Visual progress records

Family Engagement

1. **Regular updates** via app notifications
2. **Progress reports** sent weekly/monthly
3. **Video consultations** with specialists
4. **Educational resources** and guidance

PAYMENT & SUBSCRIPTIONS

Subscription Tiers

Essential Plan (₹299/month)

- Basic health assessments
- Educational content access
- Monthly progress reports
- Email support

Comprehensive Plan (₹499/month)

- Everything in Essential
- Specialized assessments
- Bi-weekly consultations
- Priority support
- Advanced analytics

Premium Plan (₹799/month)

- Everything in Comprehensive
- Unlimited consultations
- 24/7 support
- Personalized interventions
- Family coaching sessions

Payment Processing

Supported Payment Methods

- **Credit/Debit Cards**: Visa, Mastercard, RuPay
- **Net Banking**: All major Indian banks
- **Digital Wallets**: Paytm, PhonePe, Google Pay
- **UPI**: All UPI-enabled apps

Payment Security

- **PCI DSS Compliant**: Industry-standard security
- **Encrypted Transactions**: End-to-end encryption
- **Secure Storage**: No card details stored locally
- **Fraud Detection**: Real-time monitoring

Revenue Analytics

Financial Dashboards

- **Monthly Revenue**: Subscription income tracking
- **Growth Metrics**: Month-over-month growth
- **Customer Metrics**: Acquisition and retention
- **Churn Analysis**: Subscription cancellation insights

MOBILE USAGE

Mobile-First Design

The platform is optimized for mobile devices:

- **Responsive Layout**: Adapts to all screen sizes
- **Touch-Friendly**: Large buttons and easy navigation
- ⚡ **Fast Loading**: Optimized for mobile networks
- **Offline Capability**: Basic functions work offline

Mobile Best Practices

For Healthcare Providers

1. **Use landscape mode** for analytics dashboards
2. **Enable notifications** for urgent alerts
3. **Bookmark frequently used pages** for quick access
4. **Use voice input** for notes and documentation

For Administrative Staff

1. **Install as PWA** (Progressive Web App) for app-like experience
2. **Use mobile hotspot** for reliable internet connection
3. **Enable auto-sync** for offline data synchronization
4. **Regular app updates** for latest features

TROUBLESHOOTING

Common Issues & Solutions

Login Problems

Problem: Cannot log in to the platform
Solutions:

1. **Check credentials**: Verify username and password
2. **Clear browser cache**: Refresh browser data
3. **Try different browser**: Use Chrome or Firefox
4. **Contact admin**: Request password reset

⚡ Slow Performance

Problem: Platform loading slowly
Solutions:

1. **Check internet connection**: Ensure stable connectivity
2. **Close other tabs**: Free up browser memory
3. **Clear browser cache**: Remove stored data
4. **Try incognito mode**: Test without extensions

Data Not Loading

Problem: Analytics or reports not displaying
Solutions:

1. **Refresh the page**: Use browser refresh button
2. **Check date filters**: Ensure correct date range
3. **Verify permissions**: Confirm access rights
4. **Contact support**: Report persistent issues

Payment Issues

Problem: Payment processing failures
Solutions:

1. **Verify card details**: Check expiry and CVV
2. **Try different payment method**: Use alternative option
3. **Check bank limits**: Verify transaction limits
4. **Contact payment support**: Get technical assistance

Emergency Procedures

System Downtime

1. **Check status page**: Visit status.skids.clinic
2. **Use mobile app**: Switch to mobile interface
3. **Contact emergency support**: Call +91-XXX-XXX-XXXX
4. **Document issues**: Note problems for resolution

Data Loss or Corruption

1. **Stop all activities**: Prevent further data issues
2. **Contact technical support**: Immediate escalation
3. **Document the issue**: Detailed problem description
4. **Wait for resolution**: Avoid making changes

SUPPORT

Getting Help

Self-Service Resources

- **User Manual**: This comprehensive guide
- **Video Tutorials**: Step-by-step demonstrations
- **FAQ Section**: Common questions and answers
- **AI Assistant**: Dr. SKIDS chat support

Technical Support

Email Support: support@skids.clinic

- **Response Time**: 4 hours during business hours
- **Available**: Monday-Friday, 9 AM - 6 PM IST

Phone Support: +91-XXX-XXX-XXXX

- **Response Time**: Immediate during business hours
- **Emergency Line**: 24/7 for critical issues

Live Chat: Available in platform

- **Response Time**: 15 minutes during business hours
- **AI Assistant**: 24/7 automated support

Escalation Process

Level 1: Self-service and AI assistant
Level 2: Email or chat support
Level 3: Phone support and technical team
Level 4: Management escalation for critical issues

Support Ticket System

Creating Support Tickets

1. **Click "Help"** in the platform
2. **Select issue category**:
    - Technical problems
    - Account issues
    - Payment problems

- Feature requests

3. **Provide detailed description**
4. **Attach screenshots** if applicable
5. **Submit ticket** and receive confirmation

Ticket Tracking

- **Email notifications** for updates
- **Ticket status** visible in platform
- **Resolution timeline** provided
- ☆ **Feedback request** after resolution

TRAINING COMPLETION

Training Checklist

Complete these tasks to finish your training:

- [ ] **Login successfully** with your assigned credentials
- [ ] **Navigate all main sections** of the platform
- [ ] **Complete a vendor onboarding** (practice mode)
- [ ] **Review analytics dashboard** and understand metrics
- [ ] **Create a test care plan** with AI assistance
- [ ] **Process a mock payment** transaction
- [ ] **Submit a support ticket** and track resolution
- [ ] **Use mobile interface** on your smartphone
- [ ] **Complete knowledge quiz** (80% passing score)
- [ ] **Attend live Q&A session** with training team

Certification

Upon successful completion:

- **Digital certificate** of platform proficiency
- **Performance baseline** established
- **Personal KRAs** set for first 90 days
- **Ongoing training** schedule provided

CONGRATULATIONS ON COMPLETING YOUR SKIDS ADVANCED TRAINING!

You're now ready to use the platform effectively and provide excellent service to our patients and partners.