# 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\*\*

* • \*\*Enter your credentials\*\* provided by your administrator
* • \*\*Select your role\*\* from the dropdown menu
* • \*\*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:

## � \*\*PLATFORM OVERVIEW\*\*

### \*\*� Main Navigation\*\*

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

* • \*\*� Home\*\*: Platform overview and quick access
* • \*\* Discovery\*\*: Interactive health education journeys
* • \*\* Interventions\*\*: Specialized health programs
* • \*\*�‍⚚ Specialists\*\*: Our medical team directory
* • \*\* Care Plans\*\*: Patient care management
* • \*\* 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\*\*

* • \*\*Click "Analytics"\*\* in the main navigation
* • \*\*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\*\*

* • \*\*Top Performers\*\*: Best-performing vendor partners
* • \*\*Performance Distribution\*\*: Overall vendor quality spread
* • \*\*Integration Health\*\*: Technical integration status
* • \*\*Compliance Status\*\*: Regulatory compliance tracking

#### \*\*Staff Productivity Tab\*\*

* • \*\*Individual Metrics\*\*: Personal performance indicators
* • \*\*Department Performance\*\*: Team-level analytics
* • \*\*Workload Distribution\*\*: Task allocation and capacity
* • \*\*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

## \*\*VENDOR MANAGEMENT\*\*

### \*\* Vendor Onboarding Process\*\*

#### \*\*Step 1: Initial Application\*\*

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

#### \*\*Step 2: Documentation Review\*\*

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

#### \*\*Step 3: Technical Integration\*\*

* • \*\*API integration setup\*\* (handled by technical team)
* • \*\*Test environment configuration\*\*
* • \*\*Security and compliance verification\*\*
* • \*\*Performance benchmarking\*\*

#### \*\*Step 4: Approval and Activation\*\*

* • \*\*Final review\*\* by vendor management team
* • \*\*Approval decision\*\* and notification
* • \*\*Account activation\*\* and access provisioning
* • \*\*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\*\*

* • \*\*Generate performance reports\*\* automatically
* • \*\*Schedule review meetings\*\* with underperforming vendors
* • \*\*Document improvement plans\*\* and timelines
* • \*\*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\*\*

* • \*\*Team Directory\*\*: Complete staff listing with roles
* • \*\*Performance Metrics\*\*: Individual and team KPIs
* • \*\*Workload Management\*\*: Task distribution and capacity
* • \*\*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\*\*

* • \*\*Daily Check-ins\*\*: Brief status updates and priorities
* • \*\*Weekly Reviews\*\*: Detailed performance analysis
* • \*\*Monthly Assessments\*\*: Comprehensive evaluation
* • \*\*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\*\*

* • \*\*Real-time updates\*\* on goal completion
* • \*\*Visual progress indicators\*\* and charts
* • \*\*Automated alerts\*\* for missed deadlines
* • \*\*Achievement celebrations\*\* and recognition

## \*\*CARE PLANS MANAGEMENT\*\*

### \*\* Creating Care Plans\*\*

#### \*\*Step 1: Patient Assessment\*\*

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

#### \*\*Step 2: Plan Customization\*\*

* • \*\*AI-powered recommendations\*\* based on assessment
* • \*\*Manual adjustments\*\* by healthcare providers
* • \*\*Family input\*\* and preference integration
* • \*\*Timeline and milestone setting\*\*

#### \*\*Step 3: Implementation\*\*

* • \*\*Plan activation\*\* and family notification
* • \*\*Resource allocation\*\* and scheduling
* • \*\*Progress tracking\*\* setup
* • \*\*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\*\*

* • \*\*Regular updates\*\* via app notifications
* • \*\*Progress reports\*\* sent weekly/monthly
* • \*\*Video consultations\*\* with specialists
* • \*\*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\*\*

* • \*\*Use landscape mode\*\* for analytics dashboards
* • \*\*Enable notifications\*\* for urgent alerts
* • \*\*Bookmark frequently used pages\*\* for quick access
* • \*\*Use voice input\*\* for notes and documentation

#### \*\*For Administrative Staff\*\*

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

## � \*\*TROUBLESHOOTING\*\*

### \*\* Common Issues & Solutions\*\*

#### \*\*❌ Login Problems\*\*

**Problem**: Cannot log in to the platform
**Solutions**:

* • \*\*Check credentials\*\*: Verify username and password
* • \*\*Clear browser cache\*\*: Refresh browser data
* • \*\*Try different browser\*\*: Use Chrome or Firefox
* • \*\*Contact admin\*\*: Request password reset

#### \*\* Slow Performance\*\*

**Problem**: Platform loading slowly
**Solutions**:

* • \*\*Check internet connection\*\*: Ensure stable connectivity
* • \*\*Close other tabs\*\*: Free up browser memory
* • \*\*Clear browser cache\*\*: Remove stored data
* • \*\*Try incognito mode\*\*: Test without extensions

#### \*\* Data Not Loading\*\*

**Problem**: Analytics or reports not displaying
**Solutions**:

* • \*\*Refresh the page\*\*: Use browser refresh button
* • \*\*Check date filters\*\*: Ensure correct date range
* • \*\*Verify permissions\*\*: Confirm access rights
* • \*\*Contact support\*\*: Report persistent issues

#### \*\* Payment Issues\*\*

**Problem**: Payment processing failures
**Solutions**:

* • \*\*Verify card details\*\*: Check expiry and CVV
* • \*\*Try different payment method\*\*: Use alternative option
* • \*\*Check bank limits\*\*: Verify transaction limits
* • \*\*Contact payment support\*\*: Get technical assistance

### \*\* Emergency Procedures\*\*

#### \*\*System Downtime\*\*

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

#### \*\*Data Loss or Corruption\*\*

* • \*\*Stop all activities\*\*: Prevent further data issues
* • \*\*Contact technical support\*\*: Immediate escalation
* • \*\*Document the issue\*\*: Detailed problem description
* • \*\*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\*\*

* • \*\*Click "Help"\*\* in the platform
* • \*\*Select issue category\*\*:
  - Technical problems
  - Account issues
  - Payment problems
  - Feature requests
* • \*\*Provide detailed description\*\*
* • \*\*Attach screenshots\*\* if applicable
* • \*\*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.*