



TOF *Engineers and Consulting Ltd.*

*Clinic Manager: Hospital Information Management
System*

User Manual

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Important Information

When using Clinic Manager you must be mindful of the following.

- ❖ **The default user is “mainuser” without a password (blank password). This user has full access to all functionality of the software.**
- ❖ **Make sure each newly created user specifies a password for his/her user name (user account) to prevent other users operating with the user account.**
- ❖ **Make sure you read the messages you are prompted with and provide judicious responses to them. Respond with a safe choice if you are doubtful and then seek advice.**
- ❖ **Make sure you backup regularly to protect against loss of data and make recovery after a loss less costly. Do backups regularly via “Clinic Manager Backup” icon .**

1 Introduction

Clinic Manager software is designed to manage medical records, treatment and drugs dispensing history and patients billing in clinics and hospitals. Features of the solution will include the following.

- ❑ Provision for registration of patients including patients subscribing to the National Health Insurance Scheme.
- ❑ Management of a comprehensive databank of patients' medical records, consultations and treatment history.
- ❑ Management and monitoring medical charges, providing accurate information for billing patients and interacting with HMOs to receive payments.

Clinic Manager is developed in Microsoft Visual Basic 6.0, Microsoft VBA in Microsoft Access and Microsoft Access database management system. These tools supports graphical user interface and can run on a standard personal computer running Windows 95, 98, 2000 and XP. Te option of deploying on SQL-Server is provided on request.

Clinic Manager is configurable as a **stand-alone system or a multi-user system** on a network of computers such that multiple users can share application data from several workstations. **Clinic Manager** is also designed with the ability to easily customise to your specific environment and can be migrated easily to database platforms such as SQL Server.

1.1 Clinic Manager Software Modules

The key modules of **Clinic Manager** appropriately relate these key entities in the modules

- Patients Registration
- Patients Health Records
- Financial Information
- Enquiries and Reports

The Clinic Manager Database is resident on a computer dedicated as the server. All users of Clinic Manager share this data across the network.

1.2 Clinic Manager Software Architecture

- Multi-User, Client - Server Architecture.

1.3 Clinic Manager Development platform

- Visual Basic 6.0 and Microsoft Access for program design
- Microsoft Access Relational Database Management System for database design.
- Upgrading to SQL-Server database platform is accommodated

1.4 Clinic Manager Operating platform

- A local area Ethernet 100 Base-T network (or wireless network) of computers running traditional Microsoft Windows 2000/XP based operating systems.

1.5 Clinic Manager Key Modules

Clinic Manager's key functional features are enumerated below according to the modules.

- Patients Registration:
- Patients Health Records
- Patients Invoicing and Accounts Charging

- HMO\Groups Accounts Charging

1.6 Clinic Manager Security & Confidentiality Module:

- No restriction on the number of users
- Each module has a set of privileges to which a user can be assigned.
- Each user is assigned privileges/roles for each user for each module.
- Total Control in security and access levels configuration suitable for your staff hierarchy.
- Ensures data integrity as the privileges of each user can be tailored to his\her work schedule.

1.7 Clinic Manager General Features

- Easy to use with its user-friendly graphical user interface (GUI).
- Configurable as stand-alone system or a client/server multi-user environment.
- Sophisticated security system that ensures integrity and confidentiality of your mission critical information, by controlling access to both information and functionality.
- Generates a wealth of current and historical information in its databank, enabling derivation of statistical information to inform policy making, budgeting and planning
- Efficient and effective search engine to query the databank.
- Maintains a concise audit trail of operational activities.
- Scalable for future expansion to the higher platform, SQL-Server database engine.
- Exporting of all reports to remote locations as attachments to e-mail.

1.8 Guideline to this document

This document describes how to use Clinic Manager. It will, however, be valid for versions that would have been tailored to your environment. Furthermore, the words **interfaces** and **forms** are both computing terminologies describing the visual displays on the screen that users interact with; they will be used freely and interchangeably in the document.

To quickly grasp the concepts and procedures presented in this document, it is recommended you initiate a session of Clinic Manager on the computer in parallel to studying this document.

2 Clinic Manager Overview

2.1 Security and Confidentiality

Users are created to access Clinic Manager and each user is assigned a

- **security level**, which determines the type of operations (additions, modifications, deletions) that can be performed on data; and a
- **module access level**, which determines the modules that the user can access

2.2 Menus

Menu	Item	Purpose
File		
	Page Setup	
	Print	
	Change Password	
	Set Current User's Privileges	
	Connect To Datasource	
	Create Users and Assign Privileges	
	Audit Trail	
	View Defaults	
	Export Information	
	Main Switchboard	
	Exit	
Operational Data		
	HMOs	
	Primary Health Providers	
	Patients NHIS Registration Status	
	Retainerships	
	General Operational Data	
	Patients Status Definitions	
	Card Status Definitions	
	Card Types Definitions	
	Medical Activities and Charges	
	Medical Diagnosis and Codes	
	Medical Treatments and Charges	
	Medical Charges Codes	
	Financial Instruments	
	Drugs\Medication Groupings	
	Units Bases	
	Units Categories	
	Units of Storage of Drugs	
	Module Defaults	
Patients Records		
	Patients List	
	Patients Registration (Data Entry and Modifications)	
	Patients Health Records (Data Entry and Modifications)	
	Patients Standard Search	
	Patients Advanced Search	
	Health Records Search	
	Pending Appointments	

	Honoured Appointments	
	Cancelled Appointments	
Financials		
	Patients Account Charging	
	Group Account Charging	
	Patients Invoices List	
	Patients Invoices (Data Entry and Modifications)	
	Patients Invoices Search	
	HMO Requisitions for Payment	
	HMO Requisitions for Payment List	
Pharmacy		
	Drugs\Medication Groupings	
	Drugs\Medication List	
	Drugs\Medication Full Details (Data Entry and Modifications)	
	Drugs\Medication Search	
Staff Details		
	Staff List	
	Staff Full Details	
	Staff Search	
Info		
	About	
	Welcome	

2.3 General interface layout

Interfaces \ forms used for data capture and modification have the following.

1. Buttons are at the footer of the interface to
 - a. **Add**, initiates addition of a new record
 - b. **Modify**, initiate modification of existing record in focus
 - c. **Save**, to save new entries or modifications to data
 - d. **Discard** to discard changes or new entries before it is saved.
 - e. **Requery** to populate interface with all records of underlying table\query
 - f. **Refresh** to update record in focus with new information

Generally,

- To add a new record, click Add (or New XXXX)
 - To modify existing record, move to the record, click Modify)
 - Click Save to save records (new or modified)
 - Click Discard to undo changes prior to saving the data.
2. Where appropriate, information are organised in tab pages labelled appropriately
 3. A combo box is usually available at the header of the interface to locate specific record.
 4. A button labelled Help is usually at the top of the interface to provide guidance to using the specific module.

2.4 Help facility on Clinic Manager

To assist in using Clinic Manager, you can view the operational and system manuals via the **Clinic Manager** group created on the Programs menu on the Start Menu bar.

1. Select **Clinic Manager** from the Programs menu on Start Menu bar
2. Select the document you want to view. This would display the required document in .pdf format (portable document format).

3. You can navigate/use the document as you normally use any similar document. You have the choices of
 - Clinic Manager Installation Guide
 - Clinic Manager User Guide
 - Customer Feedback Change Request
 - Customer Feedback Problem Reporting

You will require Microsoft Word and Acrobat Reader on your computer to view the files.

Further more, for ease of use, where appropriate, there is a **Help** button on specific Clinic Manager interfaces that display information to guide the user on how to use the functions\facilities of the module.

3 Starting Clinic Manager

To use Clinic Manager for any useful work you should have done the following

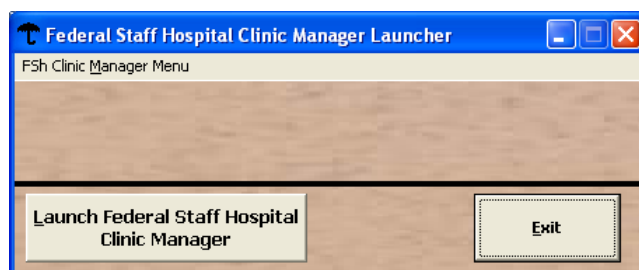
- Installed Clinic Manager on your computer and connected appropriately to the data source.
- Created user accounts that will use Clinic Manager and define privileges for each user.
- Configured Clinic Manager with operational data.

3.1 IMPORTANT:

- **The system administrator must use the default user "mainuser" as the user account to initially gain access to the software.**
- **After creating all users, the system administrator should specify a password to "mainuser" to prevent unauthorised access.**
- **Note that new users are created without a password (password is blank), therefore each user must specify his\her password for confidentiality.**

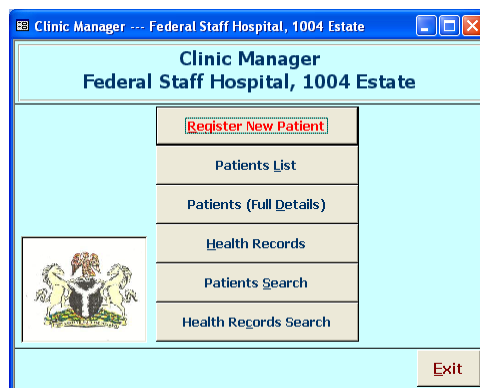
3.2 To run Clinic Manager Application

1. Select **Clinic Manager Software System** on the Start-Program bar, then select **Clinic Manager** OR Double-click on **Clinic Manager** icon on the desktop.
2. On the resulting interface displayed (below), click **Launch Clinic Manager**. You will be prompted for a username and password.



3. Enter your user name and password (if you have defined one for your user name)
 - a. If this is the first time, enter user name as **mainuser** with no password.
4. Click **OK**. The program will start displaying the main interface below
5. The System Administrator must create all the users of the software via the menu.

File->Create Users and Assign Privileges.



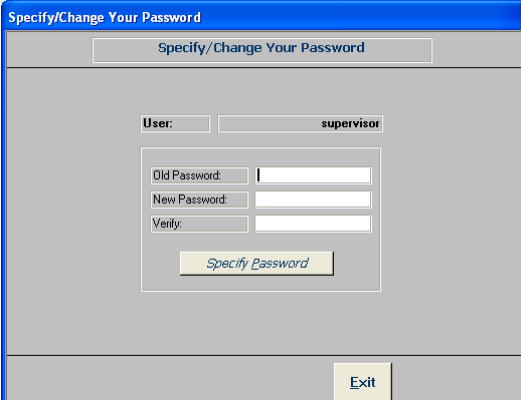
3.3 Specifying your password

Before you continue to use Clinic Manager for your operations, you must be aware that there is one function every registered user of Clinic Manager can perform. This is to change his/her password. Passwords must be secret to the user; even the system administrator should not be aware of your password. The system administrator(s) can only clear your password, if you forget it, to allow you to specify another one.

The procedure for changing your password is simple.

1. Select "**Change Password**" from the File menu on the main interface.
2. On the resulting enter your **Old Password** in the appropriate field (Leave blank if you do not have a password or you are specifying one for the first time).
3. Enter your new password in the field labelled "**New Password**"
4. Enter the new password again in the field labelled "**Verify**"
5. Click "**Specify Password**".
6. You will be prompted if the **New Password** and the **Verify** do not match exactly. You must re-enter both again to ensure registration of the password.

The next time you log on to Clinic Manager, you will be required to specify this password with your user name to gain access.



The screenshot shows a dialog box titled "Specify/Change Your Password". Inside the dialog, there is a label "User:" followed by a text field containing the word "supervisor". Below this, there is a group box containing three password fields: "Old Password:", "New Password:", and "Verify:". Each field has a corresponding input box. Below the "New Password" and "Verify" fields is a button labeled "Specify Password". At the bottom right of the dialog box is an "Exit" button.

4 System Administration Functions

The **System Administration** functions include the following operations.

- Set Current User's Privileges
- Connect To Datasource
- Create Users and Assign Privileges
- Audit Trail
- Defaults
- Backup
- Restore Backup
- Compact\Repair data

4.1 Connect To Data Source

Provides means to connect/re-connect to Clinic Manager database if the location of the database has moved to another directory on your workstation or on to a different computer on the network.

1. Click **Connect to Data** on the File menu.
2. On the interface displayed below, click the radio button labelled "**Database Name**"

(Note: The database is given as the full path location for a Microsoft Access database. Other data sources, such as ODBC, are supported but not enabled on Standard Clinic Manager)

3. If the database displayed on Database Directory text box (with full path location) is different from the required one, enter the new location or click **Browse** to browse the system (and network) for the appropriate one. The database name must be **zpatientdb.mdb**.
4. Click **Connect** to establish connection with the source of data. You will be prompted appropriately on completion.

Note that this is an alternative method to connecting to data complementing the approach used in the "**Clinic Manager Installation Guide**" guide.

You have now established connection with the database. This procedure must be repeated on every workstation on the network where Clinic Manager will be run, since they will share the same database. Furthermore, all users have access to this function.

4.2 Security and Confidentiality – Creating Users and Assigning Roles

In this section we will learn how to create new users of Clinic Manager and assign Security Levels and Module Access levels to them. **You must have Managers/Supervisors security level to perform these operations; the default user, "mainuser", has this privilege.**

1. Double-click on **Clinic Manager** icon on the desktop.
2. On the resulting interface click **Launch Clinic Manager** Login with your user name and password (if any).
3. Select **File** menu.
4. Select **Create Users and Assign Privileges**. This displays the interface below.

4.2.1 To create a new user

1. Click **Add User**
2. Enter the name of the user in the text box labelled User Name
3. Click **Save User** to create the user and add to users list
4. Click **Finish** to complete the process and enable other utilities.

4.2.2 To remove a user

5. Select the user from the list and click **Remove User**

4.2.3 To clear a user's password

6. Select the user from the list and click **Clear User Password**

(Note: Remove User & Clear User Password will be inactive if creation of a user is still in progress)

4.2.4 To specify the security level to be assigned to a user

The security level assigned to a user defines if the user can add new information, modify existing information, delete information and have access to system administration functions. Once you create a user you should assign the user a security level to allow access. The security levels available are enumerated in the table below.

Module	Privilege/Role Description
--------	----------------------------

Managers/Sys Admin	<ul style="list-style-type: none"> • Addition, modification and deletion of data • System Administration functions
Operations	<ul style="list-style-type: none"> • Addition and modification of data, excluding the System Administration.
General Users	View data only, excluding the System Administration
No Access	Access denied

From the User Accounts interface above,

1. Select a user from the list and
2. Click the desired security level

4.2.5 To specify module access levels of a user

The Module Access assigned to a user also depends on the roles or work scheduled for the user. Once you create a user you should then assign the modules that the user can access.

From the User Accounts interface above,

1. Select a user from the list and
2. Under the group Module Access to Selected User
3. Click to mark all the modules that the user can access

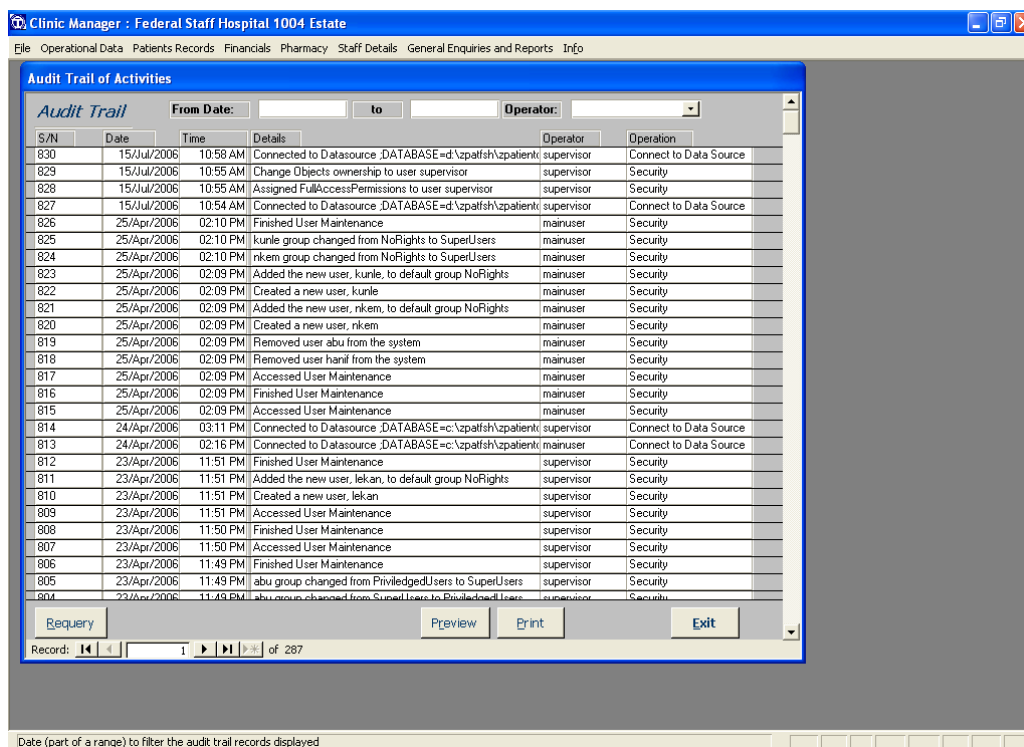
Possible Module Access levels are listed below.

Records
Doctors
Pharmacy
Accounts
Operational Data
System Administration

4.3 Audit Trail

The Audit Trail is a log of information on key activities, providing an effective tool to monitor activities on Clinic Manager. It captures the activities of each operator and each record is stamped with a date and time the activity took place.

1. Click **Audit Trail** on the File->System Administration menu to display the interface below.
2. To view the audit trail for a particular operator select the operator from **Operator** combo box.
3. To view the audit trail for a particular duration, enter the date range in From Date and TO text boxes. If an operator is already selected, the audit trail of activities done by the operator for the date range specified will be displayed.
4. To view the audit trail for all activities to date, click "**Requery**".
5. Close the interface on completing your activities.



4.3.1 To print the audit trail

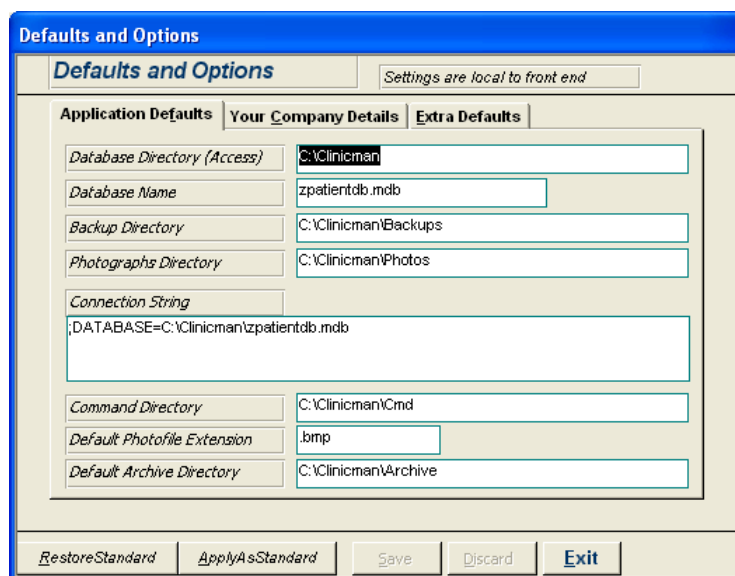
1. Enter the appropriate dates range.
2. Select an operator from the operator's combo box, if desired.
3. Click **Preview**. A preview of the audit trail will be displayed on the screen in report form
4. Click **Print**. The audit trail for the specification will be printed.

4.3.2 To prune the audit trail

5. Enter the appropriate dates range.
6. Select an operator from the operator's combo box, if desired.
7. Click Prune Audit Trail. This will delete the log for the specified date range and/or operator

4.4 Default Settings

- Default settings are information about the location of program files and connection information.
- Each workstation on the network can have its own settings, by modifying the parameters accordingly.
- The standard settings are global to all workstation, so clicking **Apply As Standard** will make the settings on your workstation the standard setting.
- Click **Restore Standard** restore standard settings to overwrite you local workstation settings.
- The company details tab is simply information on location of the company.

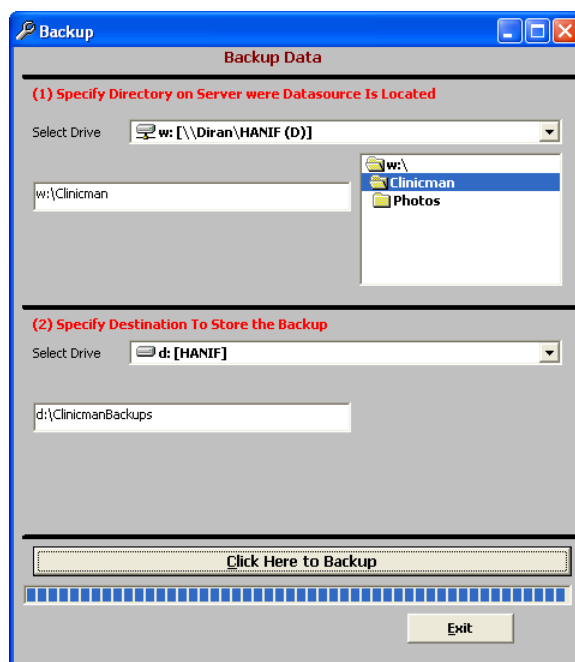


In the settings on all workstations, the **connection string** and **database name** must be the same for all workstations connected to the same database on the server. So ensure this is the case to ensure all users are sharing the same data for consistency of information processing.

4.5 Backup

4.5.1 To backup Clinic Manager database

1. Double-click **Clinic Manager Backup** on your desktop or select **Clinic Manager Backup** from the program group on the **Start -> All Programs** menu.



2. Select\specify the directory on the server where the datasource is located.
3. Select\specify the directory to store the backup

4. Click **"Click Here To Backup"**. If the backup destination directory does not exist, you will be prompted that its will be created. Respond by clicking **Yes** or click **No** and specify an existing directory.

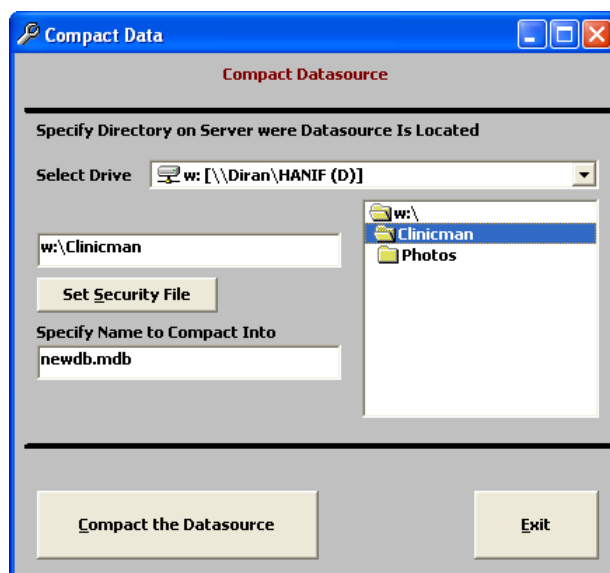
The backup will be copied to the destination path with the name **bkXXXXXX.mdb**, were XXXXXX is the short date format for the current date (e.g.bk110305.mdb). Therefore, if a backup exists for the date you will be asked in step 4 to overwrite the existing backup or create a new one. If you avoid overwriting, the existing backup will be renamed (by post fixing with the current time) and a new backup created as **bkXXXXXX.mdb**.

It is recommended that you backup Clinic Manager database regularly. If Clinic Manager is used on a daily basis, daily backups are strongly recommended.

4.6 Compact

Clinic Manager - database could become corrupted due to some unforeseen reasons such as power failures, and hard disk crashes are not uncommon and the consequences can be costly if regular backups are not made. It is possible to repair a corrupted database following the procedure below. If this fails then you must restore from a previous backup.

1. Double - click **Compact Clinic Manager**, on the desktop to display the interface below
2. Select\specify the directory on the server where the data source is located
3. Specify the Destination Directory to restore the backup (Step 2)
4. Click **Compact the Datasource**.
5. On completion continue using Clinic Manager



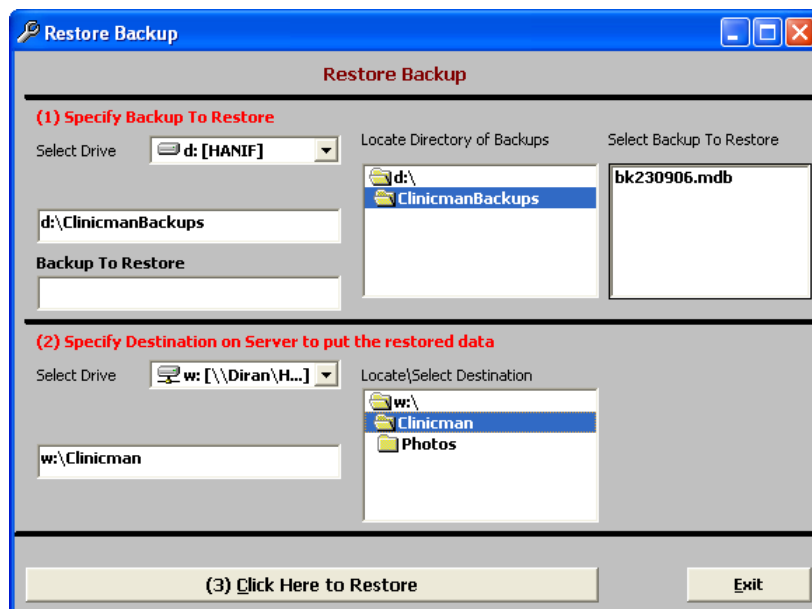
4.7 Restore Backup

Clinic Manager - database could be inadvertently deleted or corrupted due to some unforeseen reasons. Power failures and hard disk crashes are not uncommon and the effects can be costly if regular backups of Clinic Manager - database were not made. With regular backups you can restore from the most recent backup and you will only loose information entered from the last backup.

4.7.1 To restore Clinic Manager backup

6. Double - click **Restore Clinic Manager**, on the desktop to display the interface below
7. Specify the backup to Restore (Step 1)

8. Specify the Destination Directory to restore the backup (Step 2)
9. Click **"Click Here To Restore"**.
10. The backup will be restored into the destination directory, overwriting existing data.



5 Clinic Manager Operational Data

The table below lists the operational data that need to be defined to configure Clinic Manager for your site.

Operational Data	Usage\Purpose
HMOs	
Primary Health Providers	
Patients NHIS Registration Status	
Retainerships	
General Operational Data	
Patients Status Definitions	
Card Status Definitions	
Cart Types Definitions	
Medical Activities and Charges	
Medical Diagnosis and Codes	
Medical Treatments and Charges	
Medical Charges Codes	
Financial Instruments	
Drugs\Medication Groupings	
Units Bases	
Units Categories	
Units of Storage of Drugs	
Module Defaults	

5.1 Defining operational data

Only users with operational data module access privileges have access to these functions. Operational data information is strategic to proper operation of Clinic Manager and as such access to its functions must be controlled.

In each case, select the required menu and **Add** or **Modify** information as required.

1. Click the button required or select the menu required
2. To enter new record
 - a. Click **Add**
 - b. Click **Save** to save the record.
3. To modify existing record.
 - a. Navigate to the record of interest
 - b. Click **Modify**.
 - c. Change the information.
 - d. Click **Save**

5.1.1 General Operational Data

General Operational Data

General Operational Data

Continents
Countries
States of Nigeria
Cities Of States
Areas/Towns of Cities
Local Governments
Zones
Locations/Stations
Colours
Height Units
Weight Units
World Currencies
Office Locations

Exit

5.1.2 Health Management organisations; HMOs

HMOs

HMOs

HMO Code:	LA\0142\PC
HMO Name:	Clearline International
Address:	

HMO Code:	LA\0142\PH
HMO Name:	Health Care International
Address:	

HMO Code:	LA\0142\PHH
HMO Name:	Hygeia Health Maintenance
Address:	

Add Modify Save Discard Exit

Record: 1 of 8

5.1.3 Patients NHIS Registration Status

Patients NHIS Registration Status

Patients NHIS Registration Status

ID	Status:
1	Principal
2	Spouse
3	Child 1
4	Child 2
5	Child 3
6	Child 4

Add Modify Save Discard Exit

Record: 1 of 6

5.1.4 Retainerships

Retainerships/Group Names

Retainerships/Group Names

Quick Search:

Company\Group Details | **Patients List**

Company Name: **FED MIN OF INDUSTRY**

Contact:

ContactDesignation:

Address:

City:

State:

Country:

PostCode:

Phone:

Fax:

Fax:

Add Modify Save Discard Requery Preview Print Exit

Record: 1 of 788

Retainerships/Group Names

Retainerships/Group Names

Quick Search: **FED MIN OF INDUSTRY**

Company\Group Details | **Patients List**

Company Name: **FED MIN OF INDUSTRY**

NameofPatient	FileNo
AKINBOSEYE, CECELIA , MRS	FSH1004\11196
DADA, LUCIA , MRS	FSH1004\10866
IWUJI, GRACE , MRS	FSH1004\10865
OGUNBERU, KEHINDE , MRS	FSH1004\11183
ORHEWERE, EMILY , MRS	FSH1004\11564
UDOH, PIUS , MR	FSH1004\11305
UGODO, BLESSING , MRS	FSH1004\11807
ZINSU, MARY , MISS	FSH1004\11318

Record: 1 of 8

Add Modify Save Discard Requery Preview Print Exit

Record: 420 of 788

5.1.5 Patients Status Definitions

The screenshot shows the 'Patients Status' window. It has a title bar 'Patients Status' and a main area with a table. The table has columns for 'Colours:', 'Status ID', and 'Status'. The table contains the following data:

Colours:	Status ID	Status
A/ABOVE		
InPatient		
IntensiveCare		
OnAdmission		
OutPatient		

At the bottom of the window, there are buttons: 'Add', 'Modify', 'Save', 'Discard', and 'Exit'. Below these buttons is a record navigation bar showing 'Record: 1 of 5'.

5.1.6 Card Status Definitions

This screenshot is identical to the one above, showing the 'Patients Status' window with the same table and controls.

5.1.7 Card Types Definitions

The screenshot shows the 'Card Types' window. It has a title bar 'Card Types' and a main area with a table. The table has columns for 'Status ID:' and 'Status :'. The table contains the following data:

Status ID:	Status :
1	Medical
2	Dental

At the bottom of the window, there are buttons: 'Add', 'Modify', 'Save', 'Discard', and 'Exit'. Below these buttons is a record navigation bar showing 'Record: 1 of 2'.

5.1.8 Medical Activities and Charges

Medical Activities

Medical Activities

Service Name:	Charge	NHIS Charge	Di
▶ ANTENATAL CONSULTATION	0.00	0.00	
CONSULTATION (FIRST TIME)	1,000.00	1,000.00	
CONSULTATION (NORMAL)	500.00	500.00	

Add Modify Save Discard Preview Print Exit

Record: 1 of 3

5.1.9 Medical Diagnosis and Codes

Medical Diagnosis and Codes

Medical Diagnosis and Codes

Diagnosis:	Code	Group:
▶ CANCER	00041	Not Classified
CHOLERA	00038	
Investigate	0001	
MALARIA	00036	
NEOPLASMS	00037	
Not Specified	0000	
TUBERCULOSIS	00039	
TYPHOID	00040	Not Classified

Add Modify Save Discard Preview Print Exit

Record: 1 of 8

5.1.10 Medical Treatments and Charges

Treatment and Standard Charges

Service Name:	Standard Charge	NHIS Charge	No of Days Reminder, if scheduled:	Discontinue
► ACCOMMODATION (OPEN WARD)	1,000.00	1,000.00	1	<input type="checkbox"/>
ACCOMMODATION (PRIVATE WARD)	2,000.00	2,000.00	1	<input type="checkbox"/>
ADMIT PATIENT	0.00	0.00	1	<input type="checkbox"/>
ANTENATAL	10,000.00	10,000.00	1	<input type="checkbox"/>
APPENDIXECTOMY	50,000.00	50,000.00	1	<input type="checkbox"/>
Appointment For	0.00	0.00	1	<input type="checkbox"/>
BONE REPOSITION AND POP	0.00	0.00	1	<input type="checkbox"/>
BROMOCSPTRIN	750.00	750.00	1	<input type="checkbox"/>
CEASARIAN SECTION	75,000.00	75,000.00	1	<input type="checkbox"/>
CIRCUMCISION	3,500.00	3,500.00	1	<input type="checkbox"/>
CONSULTATION (FOLLOW-UP)	500.00	500.00	1	<input type="checkbox"/>
CONSULTATION (SPECIALIST)	5,000.00	5,000.00	1	<input type="checkbox"/>
DISCHARGE PATIENT	0.00	0.00	1	<input type="checkbox"/>
DISPENSING DRUGS	100.00	100.00	1	<input type="checkbox"/>
DRESSING PER DAY	500.00	500.00	1	<input type="checkbox"/>
EAR PERCNY	500.00	500.00	1	<input type="checkbox"/>
EMERGENCY CARE	0.00	0.00	1	<input type="checkbox"/>
EMERGENCY FEES	0.00	0.00	1	<input type="checkbox"/>
EVACUATION	10,000.00	10,000.00	1	<input type="checkbox"/>
EXAMINATION UNDER ANASTHESIA	5,000.00	5,000.00	1	<input type="checkbox"/>
EXPLORATORY LAPARATOMY	75,000.00	75,000.00	1	<input type="checkbox"/>

Record: 1 of 74

5.1.11 Medical Charges Codes

Financial Charge Account Codes

Charge Account Codes

ID:	Name:	Description:	Debit/Credit Client	Discontinue
► 160	CAC	None	Debit	<input type="checkbox"/>
150	CCOR	Credit Correction	Debit	<input type="checkbox"/>
140	DCOR	Debit Correction	Credit	<input type="checkbox"/>
900	DEPOSIT	Deposit	Credit	<input type="checkbox"/>
100	DISCOUNT	Discount	Credit	<input type="checkbox"/>
60	GENERAL CHARGES	General Medical Charges	Debit	<input type="checkbox"/>
70	MISCELLANEOUS	Miscellaneous	Debit	<input type="checkbox"/>
901	NONREFDP	Non Refundable Deposit	Credit	<input type="checkbox"/>
111	OSTDBALANCE	Outstanding Balance	Debit	<input type="checkbox"/>
110	PAID	Payment	Credit	<input type="checkbox"/>
120	REFD	Refund	Debit	<input type="checkbox"/>
90	TRCR	Transfer Credit	Credit	<input type="checkbox"/>
80	TRDR	Transfer Debit	Debit	<input type="checkbox"/>

Record: 1 of 13

5.1.12 Financial Instruments

Instrument Types

Instrument:	Description:
BONDS	Bonds
CASH	Cash
CHEQUE	Cheque
CREDIT CARD	Credit Card
CREDIT NOTE	Credit Note
DEBIT NOTE	Debit Note
DRAFT	Draft
FRNCUR	Foreign Currency
None	None
TRAVELLERS CHQ	Travellers Cheques

Record: 1 of 10

Add Modify Save Discard Exit

5.1.13 Drugs\Medication Groupings

Groupings of Medications\Drugs

Define Categories and Groupings of Drugs

Grouping\Category:
DRUGS
EQUIPMENT
GENERAL
MATERIALS
NOT CLASSIFIED

Record: 1 of 5

Add Modify Save Discard Exit

5.1.14 Invoice Requisition Status

HMO Invoice Requisition Status

Status ID:	Status Description:
0	Pending Despatch
1	Despatched To HMO
2	HMO Acknowledged Receipt
3	Paid By HMO
4	Returned/Queried by HMO

Record: 1 of 5

Add Modify Save Discard Exit

5.1.15 Statistics Groupings

Statistics Groupings

Statistics Groupings:

▶	MATERNAL CONDITIONS	
	NON COMMUNICABLE DISEASES	
	Not Specified	
	NOTIFIABLE DISEASES	
	OTHERS	

Add Modify Save Discard Exit

Record: 1 of 5

5.1.16 Statistics Classifications

Statistics Classifications

Statistics Classifications

Classification:	Group:
▶ Accidents RTA	NON COMMUNICABLE DISEASES
AIDS	NOTIFIABLE DISEASES
Alcohol + Drugs	NON COMMUNICABLE DISEASES
Anemia in Pregnancy	MATERNAL CONDITIONS
Cancer	NON COMMUNICABLE DISEASES
Cerebrospinal Meningitis	NOTIFIABLE DISEASES
Chickenpox	NOTIFIABLE DISEASES
CHOLERA	NOTIFIABLE DISEASES
Coronary Heart Diseases	NON COMMUNICABLE DISEASES
Deliveries and ANC Cases	OTHERS
Dents	OTHERS
Diabetes	NOTIFIABLE DISEASES
Diarrhea (simple without blood)	NOTIFIABLE DISEASES
Diarrhea with blood	NOTIFIABLE DISEASES
Diphtheria	NOTIFIABLE DISEASES
Dracunculiasis (Guinea Worm)	NOTIFIABLE DISEASES
Food Poisoning	NOTIFIABLE DISEASES
Gonorrhea	NOTIFIABLE DISEASES

Add Modify Save Discard Exit

Record: 1 of 41

6 Patients Registration and Health Records Management

In this section we will learn how to

1. Register Patient's Records
2. Search for Patient's Details
3. Enter Patient's Health Records (Consultations, Diagnosis and Treatments)
4. Search Patient's Health Records.

The menu used for these operations is labeled Patients Records with the following menu items

- Patients List
- Patients Registration (Data Entry and Modifications)
- Patients Health Records (Data Entry and Modifications)
- Patients Standard Search
- Patients Advanced Search
- Health Records Search
- Pending Appointments
- Honoured Appointments
- Cancelled Appointments

6.1 To display the list of patients

1. Click **Patients List** button on the main interface or select **Patients List** from the Patients Records menu. This will display the interface below, listing all the patients in your database.
2. Navigate to the patient record of interest and double click on the left hand edge of the record to display registration or health records details of the patient.

Patients List

<<< Double-Click on a record to display patients records or registration details

Locate By

Patient:

By NHIS No:

By Hospital File No:

Enter No and press Enter or Tab key

Reset

Filter By >>

Gender:

Marital Status:

Category:

Company:

Patient Status:

HMO:

Reset

Name of Patient	Hospital File No	NHIS No	Gender	Mar Status	Current Status	HMO
ABUBAKAR, SULEIMON, MASTER	FSH 00-05-37C		Male	Single	OutPatient	NONE
ABUBAKAR, TIJANI, MASTER	FSH 01-66-50		Male	Single	OutPatient	NONE
ABUBAKAR, UMAR, MR	FSH 01-42-60		Male	Married	OutPatient	NONE
ABUBAKAR, UMAR, MR	FSH 01-48-43		Male	Married	OutPatient	NONE
ABUBAKAR, UMAR, MR	FSH 0096-2003		Male	Married	OutPatient	NONE
ABUBAKAR, UMAR, MR	FSH 01-16-74		Male	Single	OutPatient	NONE
ABUBAKAR, UMAR BUNU, MASTER	FSH 02-03-82		Male	Single	OutPatient	NONE
ABUBAKAR, UMAR FAROUK, MAST	FSH 01-62-88		Male	Single	OutPatient	NONE
ABUBAKAR, YUSUF, MASTER	FSH 01-46-81C		Male	Single	OutPatient	NONE
ABUBAKAR, YUSUF, MASTER	FSH 01-86-62		Male	Single	OutPatient	NONE
ABUBAKAR, YUSUF, MR	FSH 00-55-35A		Male	Single	OutPatient	NONE
ABUBAKAR, YUSUF, MR	FSH 00-55-55		Male	Married	OutPatient	NONE
ABUBAKAR-SADIQ, JEMILIA, MRS	FSH 01-13-20		Female	Married	OutPatient	NONE
ABUBUKAR, SALAMATU, MRS	FSH 00-05-37		Female	Married	OutPatient	NONE
ABUDU, ADEBOLA, MISS	FSH 01-58-96		Female	Single	OutPatient	NONE
ABUDU, LATEEF, MR	FSH 01-84-71		Male	Married	OutPatient	NONE
ABUDU MOHAMMED, MASTER	FSH 0028-2003		Male	Single	OutPatient	NONE

Order By

By Name ☐ By Company ☐

By NHIS No ☐ By Manual Index ☐

By Date ☐

New Patient Requery Q Refresh R Preview Print Exit

Record: 14 of 12880

6.2 To register a new patient

1. Click **Register New Patient** on the main interface or select **Patients Registration** from the Patients Records Menu OR
2. If you are already in the Patients Register interface viewing a particular patient's detail, click **New Patient** on the interface. This will display the interface below with relevant text boxes cleared ready for data of a new patient.

Clinic Manager : Federal Staff Hospital, 1004 Estate

File Operational Data Patients Records Financials Pharmacy Staff Details General Enquiries and Reports Info

Patients' Register

Add A New Patient Preview Print

Patients Data **Contact Information** **Changes to Details**

Surname:
 First Name:
 Middle Name:
 Title:
 Address:
 Nationality: Nigerian
 State of Origin:
 Date of Birth: Gender: Male
 Marital Status: Single Religion:
 Occupation:
 Colour of Eyes: Brown Blood Group:
 Colour of Hair: Black RhD:
 Height: 0.00 Ft Special Features:
 Weight: 0.00 Kg
 Next of Kin: Address of Next of Kin:
 Relationship:

Current Status: OutPatient
Date Registered: 23-Sep-2006
Age on Registration: 0 **Current Age:** 0
Computer File No:
Hospital File No:
Card Status: Permanent
Card/Record Type: Medical
File Shelf Location:
NHIS No:
NHIS Status: Principal
HMO: NONE
Category: PERSONAL
Company: Individual

Medical History of Significance e.g. Drug Reactions:

Insert Photo

NOTE: IF the Current Age of the patient is wrong, then your computer date may be wrong OR the Date of Birth is not given or incorrect. Ensure that the Date of Birth of the patient is correct on the patients data and also set the computer date to the correct date.

Revert Save Discard Requery Refresh Exit

SurName of customer occupying the room

3. Enter the details of the patient in the appropriate text boxes on the **Patients Data** tab.
 4. Click **Contact Information** tab and enter the patients contact details and other bio-data.
 5. On completion, click **Save** to store the registration details of the new patient.
 6. To modify existing patients details, navigate to the patient or locate the patient by selecting the patient from the combo box **Locate a Patient** at the top of the interface.
 7. Click **Modify**; then make changes to the details in the required text boxes.
 8. Click **Save** when you finish. The changes will replace existing information on the patient.
- **Note** that a complete history of changes made to details of each patient is logged for future audits and can be view via the **Changes to Details** tab.

Patients' Register

Locate A Patient : FOLAMI, TAOFEK OLADIRAN, DR Preview Print

Patients Data Contact Information Changes to Details

Surname: FOLAMI
FirstName: TAOFEK
MiddleName: OLADIRAN
Title: DR
Address: 56 Femi Ayentuga Crescent, Off Adelabu Street, Surulere, Lagos
Nationality: Nigerian
StateofOrigin: Lagos
DateofBirth: 21-Aug-1962 **Gender:** Male
Marital Status: Married **Religion:** ISLAM
Occupation: IT CONSULTANT
Colour Of Eyes: Brown **Blood Group:**
Colour Of Hair: Black **RhD:**
Height: 0.00 Ft
Weight: 0.00 Kg
Special Features:
Next of Kin: Mrs M. B. Folami **Address of Next of Kin:**
Relationship: Wife Same as above

FOLAMI, TAOFEK OLADIRAN, DR
Current Status: OutPatient
Date Registered: 10-Jan-2006
Age on Registration: 44 **Current Age:** 44
Computer File No: FSH1004\19600
Hospital File No: TOF0000q
Card Status: Permanent
Card\Record Type: Medical
File Shelf Location: 1020
NHIS No: 1297763
NHIS Status: Principal
HMO: Southern Rose
Category: PERSONAL
Company: Individual

Medical History of Significance e.g. Drug Reactions:

Click to Display Patients Records Insert Photo

NOTE: IF the Current Age of the patient is wrong, then your computer date may be wrong OR the Date of Birth is not given or incorrect. Ensure that the Date of Birth of the patient is correct on the patients data and also set the computer date to the correct date.

New Patient Modify Save Discard Requery Refresh Exit

Record: 5340 of 12830

Patients' Register

Locate A Patient : FOLAMI, TAOFEK OLADIRAN, DR Preview Print

Patients Data Contact Information Changes to Details

City:
State:
Country: Nigeria
PostCode:
Phone:
Fax:
National ID Card No:
E-mail:
PlaceofBirth:
Local Government: LAGOS ISLAND
Town:
Village:

NOTE: IF the Current Age of the patient is wrong, then your computer date may be wrong OR the Date of Birth is not given or incorrect. Ensure that the Date of Birth of the patient is correct on the patients data and also set the computer date to the correct date.

New Patient Modify Save Discard Requery Refresh Exit

Record: 5340 of 12830

6.3 To search for patients' details

You can search for patients' information using one or a combination of criteria such as Name of patient, Surname, First Name, Middle Name, Hospital File Number, NHIS Number, Gender, Patients Status and HMO.

1. Click **Patients Search** on the main interface OR select **Patients Standard Search** on the Patients Records Menu. This displays the search interface below.
2. Enter the criteria for search in any of the text boxes and click Search. If results are found the list of patients will be displayed.
3. Double-Click on a record on the results list to display either the full registration details or the health records of the particular patient
4. Click **Preview** (or **Print**) to preview corresponding reports on the screen (or directly to the printer). When in Preview mode send the report to the printer via File->Print menu.
5. More complex searches can be performed by clicking **Advanced Search** button or selecting **Patients Advanced Search** from the Patients Records menu. For example, you can extend search criteria to search for patients with particular blood groups or those registered on or between particular dates.

Standard Search

Patients Standard Search Advanced Search

ENTER Search Criteria

To display all patients enter * in Name of Patient text box

Name of Patient:

Surname:

FirstName:

MiddleName:

Hospital File No:

NHIS No:

Gender:

Patient Status:

HMO:

Search

No Records: 10

Display List

Clear

Preview

Print

Double-Click on a record to display full patients details

HospitalFileNo	Name	Category	Status	RegisteredOn	NHISNumber
FSH1004/02611	ADENUGA, ANIFATU , MRS	PERSONAL	OutPatient	14-Aug-2003	
FSH1004/11046	ADENUGA, BISI , MRS	PERSONAL	OutPatient	09-Dec-1998	
FSH1004/00612	ADENUGA, BOLA , MISS	PERSONAL	OutPatient	24-Dec-2002	
FSH1004/02796	ADENUGA, DOYIN , MISS	PERSONAL	OutPatient	16-Dec-1995	
FSH1004/02060	ADENUGA, DOYINSOLA ,	PERSONAL	OutPatient	01-Feb-2000	00-00-41/00034424/2
FSH1004/02675	ADENUGA, ESTHER , MRS	PERSONAL	OutPatient	27-Jun-2005	
FSH1004/00610	ADENUGA, FUNKE , MRS	PERSONAL	OutPatient	26-Jul-2005	
FSH1004/02058	ADENUGA, OLAOLUWA , MISS	PERSONAL	OutPatient	06-May-1999	00-00-38/00034424/3
FSH1004/07252	ADENUGA, OLUSEYI ,	PERSONAL	OutPatient	10-Jul-2000	
FSH1004/02037	ADENUGA, RONKE , MRS	PERSONAL	OutPatient	17-Nov-1996	00-00-17/00034424/0

Exit

Patients Details Search - Advanced

Advanced Patients Search

Specify Search Criteria

Name of Patient:

Surname:

FirstName:

MiddleName:

Gender:

Hospital File No:

NHIS No:

Marital Status:

Registered Between: 28-Jun-2006 **And:** 10-Sep-2006

Blood Group: RhD:

Company:

Patient Category:

Patient Current Status:

HMO:

NHIS Status:

Search

No Records: 254

Display List

Clear

Preview

Print

HospitalFileNo	Name	Category	Status	RegisteredOn	NHISNumber
FSH1004/02678	ABGAS, ALAMIN , MASTER	PERSONAL	OutPatient	26-Jul-2006	
FSH1004/19092	ABDULLI, AMINA , MISS	PERSONAL	OutPatient	20-Aug-2006	
FSH1004/13108	ABOLAJI, OLUJUMBO , MISS	PERSONAL	OutPatient	20-Aug-2006	
FSH1004/19509	ABU, CHRISTANA , MRS	PERSONAL	OutPatient	14-Aug-2006	
FSH1004/19507	ABU, GABRIEL , MR	PERSONAL	OutPatient	14-Aug-2006	
FSH1004/19083	ABUBAKAR, ABUJIHAD ,	PERSONAL	OutPatient	20-Aug-2006	
FSH1004/19596	ABUBAKAR, GAMBO , MR	PERSONAL	OutPatient	13-Jul-2006	00091748/0
FSH1004/19011	ABUBAKAR, HAFSAT ,	PERSONAL	OutPatient	18-Aug-2006	
FSH1004/19554	ABUBAKAR, RUKAYA , MRS	PERSONAL	OutPatient	18-Aug-2006	
FSH1004/19084	ABUBAKAR, SALAMUTU , MRS	PERSONAL	OutPatient	20-Aug-2006	
FSH1004/19031	ADAMSON, TOLLUMI ,	PERSONAL	OutPatient	20-Aug-2006	
FSH1004/18974	ADAMU, IUUBA ,	PERSONAL	OutPatient	18-Aug-2006	
FSH1004/19503	ADEAGBO, MUTIAT , MRS	PERSONAL	OutPatient	11-Aug-2006	
FSH1004/19040	ADEAGBO, ADEDEJI , MRS	PERSONAL	OutPatient	20-Aug-2006	

Exit

6.4 To enter patients' health records

Health records are grouped according to the following; **Investigations and Diagnosis, Treatment Details** and **Drugs Dispensed**

6.4.1 Investigations and Diagnosis

Investigations and Diagnosis information include vitals, patient's complaints, doctor's diagnosis and treatment recommendations for each consultation.

1. Click **Health Records** on the main interface or select **Patients Health Records** from the Patients Records menu. This displays the interface below.
2. Select the patient of interest from **Select Patient** combo box at the top of the interface.
3. Select **Investigations and Diagnosis** tab.
4. To add details of a new consultation, click **Add**, and enter the details including vitals, complaints and diagnosis.
5. Click **Save**.
6. To modify existing information, click **Modify**, change existing details.
7. Click **Save**.
8. You can preview\print the report of the consultation in view by clicking **Preview** or **Print**.

The next stage is to enter treatment details and drugs dispensed for this particular consultation.

6.4.2 Treatment Details

Treatment details for each consultation are entered as standard treatments pre-defined as operational data. To enter treatment details follow the procedure below.

1. Navigate to the consultation detail of interest and click **Treatment Details** tab.
2. In the resulting inset, click **Add**.

3. Select the **Treatment** from the appropriate combo box. The amount to be charged for the treatment would be displayed automatically
4. Enter the **Date**.
5. Enter the number to indicate the amount of times the treatment is required, which adjusts the charge automatically.
6. Click **Save**.
7. To modify existing treatment record, click **Modify**, change the details and the click **Save**.
8. If you move back to the **Investigations and Diagnosis** tab you will notice that the **amount to charge** has been updated to reflect the cost of the treatment.
9. You can preview\print the report of the treatments in view by clicking **Preview** or **Print**.

Patients Health Records (Consultations, Diagnosis and Treatment)

<<<Double-Click to display patient's details Select Patient: FOLAMI, TAOFEK OLADIRAN, DR

Gender: Male Married Current Status: OutPatient Category: PERSONAL
 NHIS No: 1297763 Hospital File No.: TOF0000q Company: Individual
 HMO: Southern Rose

Consultations & Treatment Records Appointments Patient's Account Statement

Consultations, Diagnosis and Treatment Records

Investigations and Diagnosis Treatment Details Drugs Dispensed Make Payments

Treatment	Date	Charge	No	Amount
MALARIA TREATMENT	10-Sep-2006	750.00	1	750.00

Add Modify Save Discard Delete

Record: 1 of 1

Record: 5340 of 12830

Registry Refresh Preview Print Exit

6.4.3 Drugs Dispensed

The drugs dispensed for the consultation is entered as follows

1. Navigate to the consultation detail of interest and click **Drugs Dispensed** tab.
2. In the resulting inset, click **Add**.
3. Select the Drug Dispensed from the appropriate combo box. The amount to be charged for the drug would be displayed automatically
4. Enter the quantity required, which adjusts the charge automatically.
5. Enter the **date**.
6. Click **Save**.
7. To modify existing record, click **Modify**, change the details and then click **Save**.

Patients Health Records (Consultations, Diagnosis and Treatment)

<<<<Double-Click to display patient's details

Select Patient: FOLAMI, TAOFEK OLADIRAN, DR

Gender: Male Married
 NHS No: 1297763
 HMO: Southern Rose

Current Status: OutPatient Category: PERSONAL
 Hospital File No.: TOF0000q Company: Individual

Consultations & Treatment Records | Appointments | Patient's Account Statement

Consultations, Diagnosis and Treatment Records

Investigations and Diagnosis | Treatment Details | Drugs Dispensed | Make Payments

Drugs/Treatment Dispensed	Quantity	Unit	Amount	Date
CHLOROQUINE (TABLET)	0.00	Number	0.00	10-Sep-2006
ACTIFED (TABLETS)	0.00	Number	0.00	10-Sep-2006

Add Modify Save Discard Delete

Prescription Dispensed ? ☐

Record: 1 of 1

Record: 5340 of 12830

Regquery Refresh Preview Print Exit

6.4.4 Charging Patients Accounts and View Patients Account Statement

1. If you move back to the **Investigations and Diagnosis** tab you will notice that the **Amount To Charge** will have been updated to reflect the cost of the drugs. You can now charge the patient's account with the total amount reflecting the bill for the consultation, treatment and drugs.
2. Click **Charge Patient's Account** button. The charge will be reflected in the patients account statement, which can be viewed immediately by selecting **Patients Account Statement** tab.

Patients Health Records (Consultations, Diagnosis and Treatment)

<<<<Double-Click to display patient's details

Select Patient: FOLAMI, TAOFEK OLADIRAN, DR

Gender: Male Married
 NHS No: 1297763
 HMO: Southern Rose

Current Status: OutPatient Category: PERSONAL
 Hospital File No.: TOF0000q Company: Individual

Consultations & Treatment Records | Appointments | Patient's Account Statement

Patients Account History And Balance

Date:	Details:	Debit:	Credit:	Instr Ref:	Reverse:	
10/Sep/2006	PAID	0.00	1,750.00	NONE	<input type="checkbox"/>	PAID
10/Sep/2006	CONSULTATION (FIRST TIME)	1,750.00	0.00	NONE	<input type="checkbox"/>	CON

Total: 1,750.00 1,750.00
 Balance (Credits - Debits): 0.00

Record: 5340 of 12830

Regquery Refresh Preview Print Exit

6.4.5 Making Payments

To make payments (or debit) to a patient's account directly from this environment

1. Click **Make Payments** tab
2. Select the **Charge Code**.
3. Enter the **Amount** .
4. Then click the button **Click to Pay to Patients Account**.
5. To debit a patients account with other charges:
 - a. Select the **charge code**
 - b. Enter the **amount**
 - c. Select the **Instrument** (e.g. Invoice, Debit note, etc.)
 - d. Enter the **Instrument Reference** Number (e.g. Invoice no)
 - e. Then click button **Click to Pay to Patients Account**

The payments\charges will be reflected immediately on the patients account statement.

The screenshot shows a software interface for patient health records. The main window is titled "Patients Health Records (Consultations, Diagnosis and Treatment)". It features a patient selection dropdown at the top showing "FOLAMI, TADFEK OLADIRAN, DR". Below this, there are fields for patient details like Gender (Male), Married status, NHS No (1297763), Hospital File No (TOF0000q), and HMO (Southern Rose). The interface has several tabs: "Consultations & Treatment Records", "Appointments", and "Patient's Account Statement". The "Make Payments" tab is currently selected. Within this tab, there's a section titled "Enter Payment Details below then Click To Pay To Patients Account". This section contains fields for "Charge Code" (set to "Payment"), "Amount" (set to "2,000.00"), "Instrument of Payment" (set to "Cash"), and "Instrument Reference" (set to "None"). A prominent button labeled "Click To Pay to Patient's Account" is positioned to the right of these fields. On the far right of the payment section, there are "Preview" and "Print" buttons. At the bottom of the window, there's a status bar showing "Record: 1 of 1" and a set of navigation buttons including "Regquery", "Refresh", "Preview", "Print", and "Exit".

6.4.6 Appointments

To record future Appointments

1. Click **Health Records** on the main interface or select **Patients Health Records** from the Patients Records menu. This displays the interface below.
2. Select the patient of interest from the **Select Patient** combo box at the top of the interface.
3. Select the **Appointments** tab.
4. To add details of an appointment, click **Add**, and enter
 - a. the **details of the appointment**,
 - b. the **date** and the **time** and
 - c. the no of days to the appointment to generate a **Reminder**.
5. Click **Save**.
6. To modify existing information, click **Modify**, change existing details.
7. Click **Save**.
8. You can preview\print the report of appointments of the patient in view by clicking Preview or Print.

9. When the appointment is honoured, click the check box labeled **Performed**. This will clear the appointment from the pending list to the **Honoured Appointments** list.
10. If the Appointment has been cancelled, click the check box labeled Canceled to move the appointment to the **Cancelled Appointments** list.

Patients Health Records (Consultations, Diagnosis and Treatment)

<<<Double-Click to display patient's details

Select Patient: FOLAMI, TAOFEK OLADIRAN, DR

Gender: Male Married
 NHIS No: 1297763
 HMO: Southern Rose

Current Status: OutPatient Category: PERSONAL
 Hospital File No.: TOF0000q Company: Individual

Consultations & Treatment Records | **Appointments** | Patient's Account Statement

Patient's Appointments

Appointment Details Date Time

C CONSULTATION (FOLLOW-UP)

To See: SAHIL, D.O., DR, MRS

Remind: 1 days before apptmt

Performed? ☒ Canceled? ☐

Calendar: Sep 2006

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	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	30	1
2	3	4	5	6	7	8

New Appointment Modify Save Discard Delete Preview Print

Navigate through appointments>>> First Previous Next Last

Record: 1 of 1

Record: 5340 of 12830

Reguery Refresh Preview Print Exit

Pending Appointments, Honoured Appointments and Cancelled Appointments lists can be displayed by selecting appropriate items on the Patients Records menu

6.5 To search patients' health records

You can search health records by one or a combination of patient name, dates of consultations, treatment and activities and diagnosis.

1. Click **Health Records Search** from the main interface of select the **Health Records Search** from the Patients Records menu. This displays the interface below.
2. Enter the criteria for search in any of the text boxes and click **Search**. If results are found the list of patients will be displayed.
3. Click **Display** to display in full the health records results of the search.
4. Click Preview (or Print) to preview corresponding reports on the screen (or directly to the printer). When in Preview mode send the report to the printer via File->Print menu.

Patients Health Records Search

Enter Search Criteria in text boxes

Standard Search | Extended Search

Patient: ABA, FELICIA , MRS

Between: [] And: []

Month: [] Year: []

Activity: []

Diagnosis: []

Bill Paid: []

Search

Clear

Display

No Records:
2

Search Results

Activity	NameofPatient	ActivityOn
CONSULTATION (FIRST TIN	ABA, FELICIA , MRS	14-Aug-2002
CONSULTATION (NORMAL)	ABA, FELICIA , MRS	04-Sep-2006

Preview

Print

Exit

7 Patients Accounts Charging and Patients Invoicing

In this section we will learn how to

1. Charge patients for medical services and treatments provided.
2. Generate invoices for patients.
3. Generate invoices\requests for payments to HMOs.
4. Search for invoices.

The menu used for these operations is **Financials** with the following menu items.

- Patients Account Charging
- Group Account Charging
- Patients Invoices List
- Patients Invoices (Data Entry and Modifications)
- Patients Invoices Search

7.1 Charge patient for medical services and treatments provided

7.1.1 Patients Accounts Charging

You can charge patients accounts directly with services and treatments provided.

1. Select **Patients Accounts Charging** from the Financials menu
2. Select the **Patient**
3. Select the **Charge Code** (which includes treatment details)
4. Enter the **date**
5. Enter\Modify the **Amount**
6. Enter the **instrument** and **instrument ref** (e.g. invoice no, receipt no, debit note, cheque, etc)
7. Enter the **Details** of the service/charge
8. Enter the **Invoice** relating to the payment (if it is a payment)
9. Click **Post**. The account list will be updated with a new record and the balance updated to reflect current position.
10. You can print\preview the patient's accounts report by clicking Print or Preview.

7.1.2 Group Accounts Charging

You can also charge Patients Accounts based on the group\company of the patient. This facilitates generation of accounts and charges to the company\group that will be responsible for payment.

1. Select **Group Accounts Charging** from the Financials menu.
2. Select the **Group**.
3. Select the **Patient** (only patients in the group will be in the combo box list)
4. Select the **Charge Code** (which includes treatment details)
5. Enter the **date**
6. Enter\Modify the **Amount**
7. Enter the **instrument** and **instrument ref** (e.g. invoice no, receipt no, debit note, cheque, etc)
8. Enter the **Details** of the service/charge
9. Enter the **Invoice** relating to the payment (if it is a payment)
10. Click **Post**. The account list will be updated with a new record and the balance updated to reflect current position.
11. You can print\preview the patient's accounts report by clicking Print or Preview.

Patients Accounts Charging

Patient: FOLAMI, TAOFEEK OLADIRAN, DR
 Charge Code: INNOCULATIONS
 Date: 10-Sep-2006
 Amount: 3,500.00
 Instrument: Cash
 Instrument Ref: None
 Details: INNOCULATIONS
 Invoice:
 Post

Patients Account Unpaid Charges Records

Date	Details	Debit	Credit	Instr Ref	Reverse	
10/Sep/2006	PAID	0.00	1,750.00	NONE	<input type="checkbox"/>	PAID/CAS
10/Sep/2006	CONSULTATION (FIRST TIME)	1,750.00	0.00	NONE	<input type="checkbox"/>	CONSULT.

Total: 1,750.00 1,750.00
 Balance (Credits - Debits): 0.00

Preview Print Exit

Groups Accounts Charging

Group: Individual Patient: FOLAMI, TAOFEEK OLADIRAN, DR
 Charge Code:
 Date: 10-Sep-2006
 Amount: 0.00
 Instrument: None
 Instrument Ref: None
 Details:
 Invoice:
 Post

Group Accounts Unpaid Charges Records

Date	Details	Patient	Debit	Credit	Instr Ref	Re
10/Sep/2006	ACCOMODATION (OPEN WARD)	ABBA, MUSA,	1,000.00	0.00	NONE	
10/Sep/2006	PAID	FOLAMI, TAOFEEK OLAD	0.00	1,750.00	NONE	
10/Sep/2006	CONSULTATION (FIRST TIME)	FOLAMI, TAOFEEK OLAD	1,750.00	0.00	NONE	
17/Aug/2006	PAID	ABAGANA, PARNATA, M	0.00	30,000.00	NONE	
17/Aug/2006	CONSULTATION (FIRST TIME)	ABAGANA, PARNATA, M	53,300.00	0.00	NONE	

Total: 56,050.00 31,750.00
 Balance (Credits - Debits): 24,300.00

Preview Print Exit

7.2 Generate Invoices for Patients

1. Select **Patients Invoices** from Financials menu
2. First create a template for the invoice
 - a. Click **New Invoice**
 - b. Select\Enter **date** of invoice.
 - c. Select the **Patient**
 - d. Click **Save**. You have now created a template for the invoice.
3. The next step is to create the invoice details, which can include Investigations and Diagnosis records of the patient.
 - a. On the inset in the **Invoice Details** tab, Click **Add**
 - b. Select an **Investigations and Diagnosis** record from the combo box under **Select** OR enter the details under **Description**.
 - c. Enter\Adjust the **Amount**.
 - d. Click **Save**.
 - e. Repeat Steps a to d for other details.
4. The **Attached Consultations/Services** tab displays all the Investigations and Diagnosis records relating to this invoice in view.
5. You can modify details of each invoice's details by clicking **Modify**, change the details on the desired records, then click **Save**.
6. You can delete a detail by selecting the record, then click **Delete**. The record will be deleted if the invoice has not been issued.
7. Click
 - a. **Issued** to indicate invoice has been issued;
 - b. **Cancelled to** indicate invoice has been cancelled; **Restore** to reverse cancellation.
 - c. **Negotiated** to indicate invoice has been negotiated.
8. You can print\preview the invoice report by clicking **Print** or **Preview**.
9. To locate an invoice, click **Locate** button and select the invoice from the combo box labeled **Select Invoice**.
10. To display invoices list select **Patients Invoices List** to display list of all invoices to date.

The screenshot displays the 'Invoices' application window. The 'Invoicing' tab is active, showing fields for Date (10-Sep-2006), Patient-FileNo (FOLAMI, TAOFEK OLADIRAN, DR), Invoice Ref No (FSH1004VIN\00071), and Send Bill To (Individual). Status checkboxes for Issued, Negotiated, Cancelled, and Paid are on the right. Below, the 'Attached Consultations/Services' tab is selected, showing a table with two rows of consultation details. At the bottom, there are buttons for New Invoice, Modify, Save, Discard, Reguery, Refresh, Locate, Preview, Print, and Exit, along with a record counter showing 2 of 2 records.

Select	Description	Amount
▶	CONSULTATION (FIRST TIME) on 10-Sep-2006	1,750.00
▶	CONSULTATION (NORMAL) on 10-Sep-2006	500.00

Record: 1 of 2

InvoiceTotal: 2,250.00
Two Thousand Two Hundred and Fifty Naira Only

Record: 2 of 2

7.3 Generate Invoices\Requests for Payments to HMOs

1. Select **HMO Requisitions For Payment** from Financials menu
2. First create a template for the requisition
 - a. Click **New requisition**
 - b. Select the **Date**
 - c. Select the **HMO**
 - d. Click **Save**. You have now created a template for the requisition. Note that the Reference Number is automatically generated. You can replace it with your own code. The Status is set by default to Pending Dispatch.
3. The next step is to create the details which are patients invoices already generated and must be sent to the HMO
 - a. On the inset in the **Patients Invoices Attached to Payment Requisition** tab, Click **Add**
 - b. Select an invoice from the combo box under **Invoice**.
 - c. Click **Save**.
 - d. Repeat Steps a-c for other invoices.
4. Double-click on the left edge of an invoice record to display full details of the invoice.
5. You can print/preview the requisition report by clicking **Print** or **Preview**.
6. To locate a requisition, select from the combo box labeled **Select Requisition**.
7. To display invoices list, select **HMO Requisitions For Payment List** to display list of all requisitions to date.

HMO Invoice Requisitions

HMO Payments Requisitions Select Requisition

Date: **30-Sep-2006**

HMO: **NONE**

Requisition Code: **NONE\REQ\00004**

Status: **Pending Despatch**

Date Sent:

Date Paid:

Date Returned:

Patients Invoices Attached to Payment Requisition

Double Click on a record to display full invoice details

Invoice:	Amount:
▶ FSH1004\INV\00067-30-Sep-2006-ABA, FELICIA, MRS	0.00
FSH1004\INV\00068-30-Sep-2006-ABA, VICTOR, MASTER	0.00

Add **Modify** **Save** **Discard**

Record: **1** of 2

InvoiceTotal: **0.00**
Only

New Requisition **Modify** **Save** **Discard** **Requery** **Refresh** **Preview** **Print** **Exit**

Record: **2** of 3

Requisition Ref No	Date	HMO	Total	Status
LA\0142\PH\REQ\00001	13-Sep-2006	Health Care International	0.00	Pending Despatch
NONE\REQ\00004	30-Sep-2006	NONE	0.00	Pending Despatch
LA\0142\PS\REQ\00003	30-Sep-2006	Southern Rose	0.00	Pending Despatch

7.4 Search for Invoices

You can search for invoices using one or a combination of criteria such as Name of patient, Invoice References, Dates Issue and Invoices Status, and searches can be further extended by HMO, Company Name and NHIS status

1. Click **Patients Invoices Search** from the Financials menu. This displays the search interface below.
2. Enter the criteria for search in any of the text boxes in the **Standard Search** tab (and in the Extended Search tab)
3. Click **Search**. The list of invoices matching the criteria specified will be displayed.
4. Double-Click on a record on the results list to display full details of the particular invoice.
5. Click **Preview** (or **Print**) to preview corresponding reports on the screen (or directly to the printer). When in Preview mode send the report to the printer via File->Print menu.

Invoice Date	Invoice Reference No	Name Of Patient
06-Sep-2006	FSH1004\INV\00069	DABA, MUSTAPHA - MR
10-Sep-2006	FSH1004\INV\00071	FOLAMI, TAOFECK OLADIRAN, DR

8 Pharmacy – Drugs and Medication Records

In this section we will learn how to record Drugs\Medications and the prices patients are charged.

1. To display the list of drugs and medications select **Drugs\Medication List** from Pharmacy menu. This displays the interface below.
2. To move to a particular record select the drug **Quick Search** combo box
3. Double-click on the record to display full details of the drug\medication.
4. To discontinue a drug, select or move to the appropriate record, click **Discontinue** button at bottom of the form. Click **Re-Introduce** to re-introduce a drug on the list of approved drugs.

List of Drugs and Medications

Quick Search:

<<<<To Get Full Details:Double-Click on item

Name	Code	Group	Unit	Std Charge	NHIS Charge	Discontinue
ACTIFED (TABLETS)	AC00180	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
ADENALINE (INJECTION)	ADEN-138	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>
AGUMENTRINE (TABLET)	AGUM-000030	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
ALDOMET (TABLET)	ALDO-000105	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
AMINOPHYIN	AMIN-141	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>
AMOXICYLLIN 500MG (CAPSU)	AMOX-000074	DRUGS	Capsules	0.00	0.00	<input type="checkbox"/>
AMOXICYLLIN 500MG (SYRUP)	AMOX-000075	DRUGS	Syrup	0.00	0.00	<input type="checkbox"/>
AMPICLOX (INJECTION)	AMPI-000080	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>
AMPICLOX (SYRUP)	AMPI-000081	DRUGS	Syrup	0.00	0.00	<input type="checkbox"/>
AMPICLOX (TABLET)	AMPI-000079	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
ANALGIN (INJECTION)	ANAL-181	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>
APRESOLINE (INJECTION)	APRE-133	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>
ARTESUNATE	ART00200	GENERAL	Number	0.00	0.00	<input type="checkbox"/>
ASKAMYN (TABLET)	ASKA-173	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
ASPIRIN (TABLET)	ASP-000017	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
ATROPIN (INJECTION)	ATRO-130	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>
AUGMENTRINE	AUGM-000031	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>
BENOVALE C (CREAM)	BENO-171	DRUGS	Cream\Oint	0.00	0.00	<input type="checkbox"/>
BENOVALE N (CREAM)	BENO-170	DRUGS	Cream\Oint	0.00	0.00	<input type="checkbox"/>
BROMOSAPTRIN	BROM-188	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
BRUFFEN (TABLETS)	C00184	DRUGS	Tablets	0.00	0.00	<input type="checkbox"/>
BUISOPAM (INJECTION)	BUISC-000010	DRUGS	Injection	0.00	0.00	<input type="checkbox"/>

Order By:

Record: 1 of 193

Stock Item Details

Quick Search:

Code: AC00180

Name: ACTIFED (TABLETS)

Group: DRUGS

Unit of Measure: Tablets

Charge/Per Unit: 0.00

Charge/Per Unit NHIS: 0.00

Storage Location: Main Store

Discontinued?: No

Record: 1 of 193

5. To add a new drug to the approved list, select **Drug\Medication Full Details** from the Pharmacy menu. This displays the form above.

- a. Click **Add**,
 - b. Enter the details of the drug including
 - i. the group,
 - ii. unit of measure (to be used for dispensing),
 - iii. Charge per unit for patients,
 - iv. Charge per unit for NHIS Registered Patients and
 - v. Storage location
 - c. Click **Save**
6. You can print\preview relevant reports as required
7. To search for a drug or a group of drugs, select **Drugs\Medication Search** from Pharmacy menu. This displays the interface below.
8. Enter the criteria (e.g. Drug Name, Drug Code, etc.).
9. Click **Search**. Results of the search will be displayed. Double click on a record to display full details of the drug.
10. You can preview or print reports of the search via Preview\Print buttons.

Stock Search

Drugs\Medication Search

Enter Search Criteria in text boxes

All:
 Drug Name:
 Stock:

Unit:
 Group:
 Storage Location:
 Operating Location:
 Discontinued:

Search
 Clear
 Display
 No Records:
 0

Search Results

Double-Click on record to get full details

Preview Print Exit

9 Staff Information

Clinic Manager provides a sub module to manage information on the staff of the hospital. This information is important particularly to the consultation information, which must be stamped with the name of the doctor that the patient consulted. Staff details are managed the same way as patients registration details are managed.

9.1.1 To display list of staff

1. Select **Staff List** from Staff Details menu. This displays the list of staff shown below.
2. To move to a particular staff, select the staff from the combo box **Locate Staff**.
3. Double click on the left edge of the record to display full details of the staff.

Staff List

Locate Staff:

<<< Double-Click on a record to display full staff details

Staff ID	SunName	FirstName	MiddleName	NameTitle	Gender	Grade	Step	Category	Status
ID\00244	ABAKPA	G.		MR	Male	1	1	HATISS	Inservice
ID\00132	ABDULLAHI	O.K		MRS	Female	7	1	HATISS	Inservice
ID\00207	ABENG	E.		MR	Male	3	1	HATISS	Inservice
ID\00151	ABOGUNRIN	S.G		MR	Male	5	1	HATISS	Inservice
ID\00123	ABUBAKAR	A.Y.		MR	Male	7	1	HATISS	Inservice
ID\00204	ADAMA	E.		MR	Male	3	1	HATISS	Inservice
ID\00175	ADEBIMPE	A.		MR	Female	4	1	HATISS	Inservice
ID\00218	ADEDYIN	A.		MRS	Female	2	1	HATISS	Inservice
ID\00084	ADEDUN	V.O		MRS	Female	9	1	HATISS	Inservice
ID\00071	ADEGBAYIBI	A.O		MRS	Female	9	1	HATISS	Inservice
ID\00211	ADEMOSU	A.		MRS	Female	2	1	HATISS	Inservice
ID\00112	ADENLE	A.		MISS	Female	8	1	HATISS	Inservice
ID\00172	ADENUGA	I.		MRS	Female	5	1	HATISS	Inservice
ID\00257	ADEOSUN	J.O		MRS	Female	11	1	HATISS	Inservice
ID\00162	ADEKIBIGBE	O.O		MRS	Female	5	1	HATISS	Inservice
ID\00181	ADESHAKIN	O.A		MRS	Female	4	1	HATISS	Inservice
ID\00201	ADESHINA	S.		MISS	Female	3	1	HATISS	Inservice
ID\00256	ADETUTU	O.O		MRS	Female	11	1	HATISS	Inservice
ID\00057	ADEWUMI	O.A		DR	Male	10	1	HATISS	Inservice
ID\00129	ADEYEMI	A.		MRS	Female	7	1	HATISS	Inservice
ID\00272	ADEYEMI	F.A		MRS	Female	10	1	HATISS	Inservice
ID\00186	AFOLAYAN	Y.F		MISS	Female	4	1	HATISS	Inservice
ID\00091	AGBA	V.A		MRS	Female	9	1	HATISS	Inservice
ID\00188	AGBI	E		MRS	Female	4	1	HATISS	Inservice
ID\00229	AGBONLE	P.		MRS	Female	2	1	HATISS	Inservice

Order By
☐ By Name
☐ By Staff ID
☐ By Category
☐ By Gender

Requery Refresh Preview Print Exit

Record: 1 of 235

9.1.2 To search for staff details

1. Select **Staff Search** from the Staff Details menu. This displays the search interface shown below.
2. Specify search criteria in **Basic Search** tab (and Extended search tab).
3. You can search by one or a combination of
 - a. Name,
 - b. Surname,
 - c. Middle name,
 - d. First name,
 - e. Gender,
 - f. Designation
 - g. Qualification
4. Click **Search**. Results matching the specified criteria will be displayed.

Staff Search

Enter Search Criteria in text boxes on the tab then click Search

Basic Search | **Extended Search**

Enter search criteria then click search (or press ALT + S)

EmployeeCode:
Surname:
Midname:
FirstName:
Gender: Female
Designation:
Qualification:

To display all personnel enter * in Surname text box

Search Results

EmployeeCode	Name	Grade	Step	Gender	MaritalStatus	Status	Category
ID\00132	ABDULLAH, O.K., MRS	7	1	Female	Married	Inservice	HATISS
ID\00175	ADEBIMPE, A., MR	4	1	Female	Married	Inservice	HATISS
ID\00218	ADEDOTYIN, A., MRS	2	1	Female	Married	Inservice	HATISS
ID\00084	ADEDUN, V.O., MRS	9	1	Female	Married	Inservice	HATISS
ID\00071	ADEGBAYIBI, A.O., MRS	9	1	Female	Married	Inservice	HATISS
ID\00211	ADEMOSU, A., MRS	2	1	Female	Single	Inservice	HATISS
ID\00112	ADENLE, A., MISS	8	1	Female	Single	Inservice	HATISS
ID\00172	ADENUGA, L., MRS	5	1	Female	Married	Inservice	HATISS
ID\00257	ADEOSUN, J.O., MRS	11	1	Female	Married	Inservice	HATISS
ID\00162	ADERIBIGBE, O.O., MRS	5	1	Female	Married	Inservice	HATISS
ID\00181	ADESHAKIN, O.A., MRS	4	1	Female	Married	Inservice	HATISS
ID\00201	ADESHINA, S., MISS	3	1	Female	Married	Inservice	HATISS
ID\00256	ADETUTU, O.O., MRS	11	1	Female	Married	Inservice	HATISS
ID\00129	ADEYEMI, A., MRS	7	1	Female	Married	Inservice	HATISS
ID\00272	ADEYEMI, F.A., MRS	10	1	Female	Married	Inservice	HATISS
ID\00186	AFOLAYAN, Y.F., MISS	4	1	Female	Married	Inservice	HATISS
ID\00091	AGBA, V.A., MRS	9	1	Female	Married	Inservice	HATISS
ID\00188	AGBI, E., MRS	4	1	Female	Married	Inservice	HATISS

Double-Click on a record to display full staff details

Exit

9.1.3 To create details of a new staff

1. Select **Staff Full Details** from Staff Details menu.
2. Click **Add**
3. Enter staff details in the
 - a. **Employment Information** tab
 - b. **Physical Features** tab and
 - c. **Contact Information** tab
 - d. Click **Insert Photo**, locate and select the staff photo file on your computer.
4. Click **Save**.
5. You can print\preview staff details via print\preview button.
6. To modify details, click **Modify**, change the detail(s) you want, and then click **Save**.

Staff Details

Search Name:

ID: ID\00244 Name: ABAKPA, G. ; MR

Employment Information | Physical Features | Contact Information | Changes to Details

Surname: ABAKPA
First Name: G.
Middle Name:
Title: MR
Gender: Male
MaritalStatus: Married
Payscale: HATISS
Grade: 1
Step: 1
Location: Lagos
Department: Personnel Management
Section:
Designation: Cleaner
Qualification: FSLC

Employee Status: Inservice
Date Employed: 29-Jun-1989
Date Confirmed: 26-Jun-1991
Date Appointed/Prom: 29-Jun-1989
File No.: FSH1004\ID\00244

Insert Photo

Add **Modify** **Save** **Discard** **Requery** **Refresh** **Preview** **Print** **Exit**

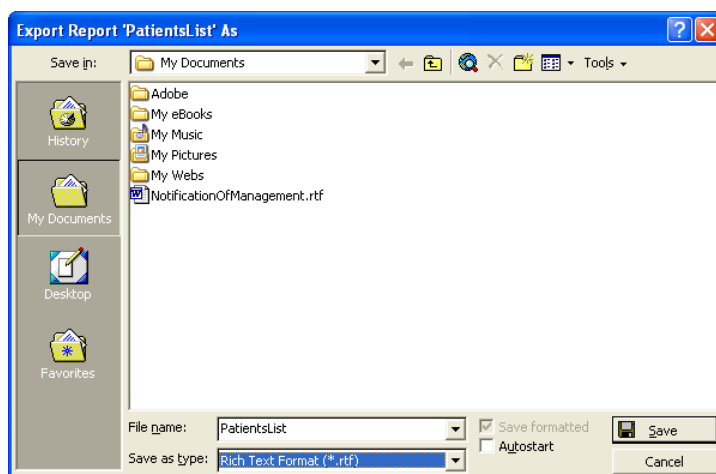
Record: 1 of 235

10 Exporting Reports to other file formats

You would have noticed by now that you can print set of reports from each of the interfaces. All reports can be printed directly to the printer or preview on the screen. However, Clinic Manager offers the flexibility to export report in several file formats such as Microsoft Excel, rich text, snapshot format and any other format supported on your system.

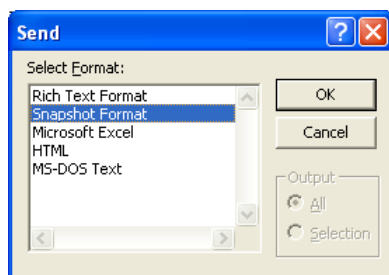
10.1.1 To export to other file format

1. From the preview of the report as shown below, select **Export** from **File->Export Information** menu.
2. The dialog box shown below will be displayed.
3. Enter the file name in **File name**.
4. Select the file type to export to in **Save as type**; e.g. Microsoft Excel
5. Navigate to the directory/folder to put the file.
6. Click **Save**.
7. The report will be saved as the specified file type.



10.1.2 To export the report as an attachment to e-mail

1. Select **Mail Recipient (As Attachment)** from **File->Export Information** menu.
2. Select the file format on the interface displayed, then Click **OK**.
3. Depending on your Internet settings, specify appropriate settings to send the file as an attachment



11 Appendix

11.1 Example Reports