

Easy Hospital Management with AI

User Manual for operators

Module **easy_hospital_management** · version 19.0.1.7.0

Odoo 19.0 Community

Front Desk · Clinical · Billing · Staff · Payroll

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How to read this manual

This manual is written for a person who has never used Odoo before and who has just been handed a hospital that runs on it. It does two things:

- Part 1 (Chapters 1-4)** explains the ideas and sets the hospital up, once, from an empty database to a hospital that can open its doors.
- Part 2 (Chapters 5-11)** holds the day-to-day chapters, **one per job role**. Find your job title in the table below and read that chapter. You may safely ignore the chapters for other people's jobs.
- Chapters 12-14 and the appendices** cover what the system does on its own, what to do when it refuses something, and a reference for every field.

Every screen in this manual has a picture. The pictures were taken on a real Odoo 19 database with this module installed, using the demonstration hospital that ships with the module ("Easy Care General Hospital"). Your own screen will show your own names and numbers, but the buttons and fields sit in exactly the same places.

Your job	Your role name in Odoo	Read chapter
Hospital owner, manager, IT administrator	Hospital Manager	3, 4 and all of them
Reception / front desk / registration clerk	Receptionist	5
Nurse, ward staff, OT assistant	Nurse	6
Doctor, consultant, surgeon	Doctor	7
Cashier, accounts, billing counter	Billing Officer	8
HR officer, duty roster in-charge	Staff Officer	9
Payroll officer	Payroll Officer	10
Anyone who needs numbers	any role	11

A note on words used in this manual

- Click** means press the left mouse button once.
- A field** is a box you type in or choose from.
- A list** is a table of records (rows). **A form** is one single record opened on its own page.
- Save** — Odoo 19 shows a small **cloud icon** in the top-left of a form when you have unsaved changes. Click it (or press `Alt + S`) to save. The **counter-clockwise arrow** next to it throws your changes away.
- Text shown `like this` is something you type or a technical name.

Assumption stated up front. This manual describes the module exactly as it is built in version 19.0.1.7.0 on Odoo 19 Community. It does not describe Odoo Enterprise features, and it does not describe pharmacy stock, laboratory result entry or radiology reporting, because this module does not contain them. Where the module intentionally leaves something to standard Odoo (accounting, e-mail, users), the manual says so and points you there.

Part 1 — Understand and set up

Chapter 1. The one idea you must understand: the encounter

Everything in this module hangs off one record: the **encounter**.

An encounter is one visit. The patient arrives, an encounter is opened. Everything that happens during that visit — the consultation fee, the injection, the bed, the operation theatre, the prescription, the vital signs, the invoice, the payment — is attached to that one encounter. When the patient goes home and the money is settled, the encounter is closed.

The patient record, by contrast, lives forever. One patient, one patient record, one patient ID card — and many encounters over the years.

There is deliberately **no "inpatient" and "outpatient" split** in this module. A patient who is admitted to a bed is simply an encounter that also has a facility assigned to it. That is the only difference. This keeps the front desk's job simple: *register the patient, open an encounter*.

The life of an encounter

An encounter moves through six states. The state is shown as a ribbon of buttons at the top-right of the encounter form.

State	What it means	Who usually moves it here
Draft	Being typed. Nothing has happened yet. Can still be deleted.	Receptionist
Open	The visit is live. The patient is in the building.	Receptionist (Confirm)
In Progress	At least one service has actually started.	Nurse / Doctor
Service Done	All services delivered, no bed still occupied. Ready to bill.	Doctor / Nurse, or automatically
Closed	Finished and accounted for. Read-only history.	Billing Officer or Manager
Cancelled	Called off. Only possible before anything is delivered or invoiced.	Receptionist / Manager

Two rules that save a lot of confusion later:

- An encounter **cannot be marked Service Done** while a patient still occupies a bed, cabin or ICU. Discharge the patient from the facility first.
- An encounter **cannot be closed** while any service is still "Ordered" or "Started". Deliver them or cancel them first.

The money states

Separately from the state above, every encounter carries a **payment state**, which the system computes for you and which you can never type by hand:

Payment state	Meaning
No Charge	Nothing chargeable on this visit (or everything is free).
Not Paid	There are charges and nothing has been received.
Partially Paid	Some money received, a balance is still due.
Paid	Balance due is zero.
Overpaid	More money received than the charges.

All five are valid. The module does not force a patient to pay in full. Zero payment, part payment and full payment are all allowed, and a manager decides (in Settings) whether an encounter with a balance may be closed, and above what amount that needs a manager's approval.

Chapter 2. The seven roles

Access is given by ticking a role on a user. A person may hold more than one role. The roles were designed around one principle: **the front desk never touches money, and money people never edit clinical notes.**

Role	Can do	Cannot do
Receptionist	Register patients, open encounters, book and check in appointments, assign a bed/cabin, see the Reception Board and queue	Create invoices, take payments, see payroll
Nurse	Record vital signs, deliver services, change facility housekeeping status (clean/maintenance)	Prescribe, invoice, take payments
Doctor	Consult, diagnose, prescribe, complete services on their own encounters	Invoice, take payments, edit payroll
Billing Officer	Create invoices, receive every payment, deposits, refunds, settle outstanding balances	Prescribe, edit clinical records
Staff Officer	Staff records, specialties, shifts, the duty roster, attendance corrections	Payroll amounts, patient money
Payroll Officer	Contracts, salary rules and structures, payslips and batches	Patient clinical data
Hospital Manager	Everything above, plus Configuration, force-closing an encounter over the threshold, and all reports	—

Two protections are built in and cannot be switched off by mistake:

- A non-billing user who tries to change an amount on an encounter — even through an import or a technical tool — is refused with an access error.
- A doctor sees **their own** encounters, encounters where they performed a service, and encounters that have **no doctor yet**

(so a walk-in waiting for a doctor is reachable). Every other hospital role sees all encounters.

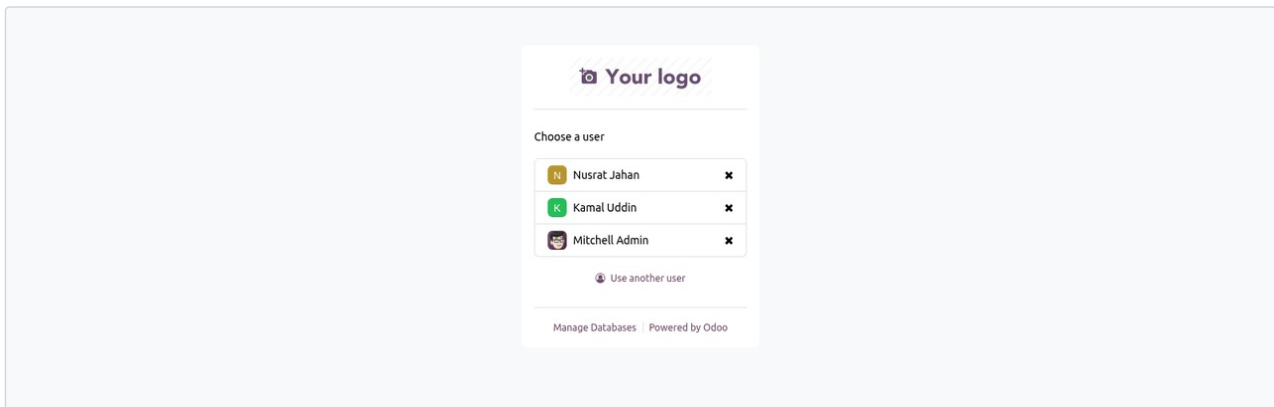


Figure 2.1 — The login screen. Type the e-mail (login) and password your administrator gave you, then click

Log in.

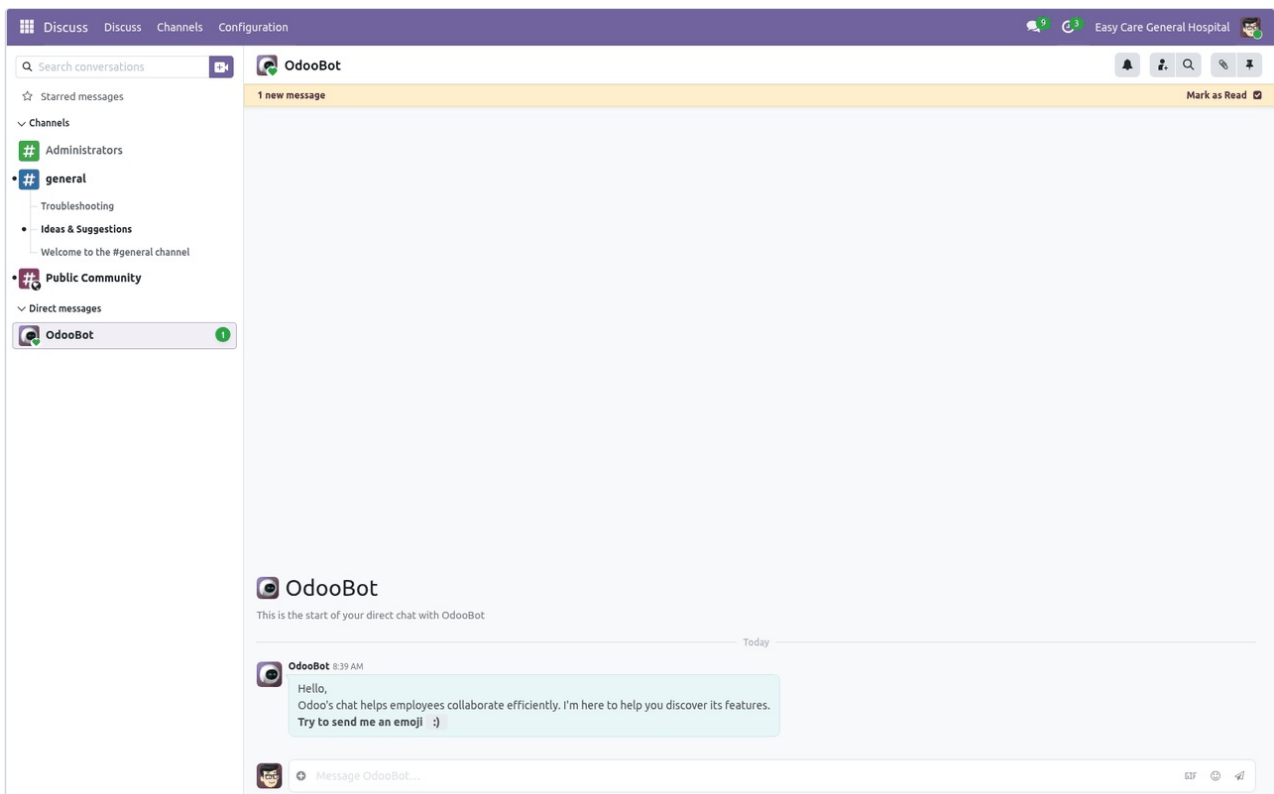


Figure 2.2 — After logging in you see the apps. Click

Hospital to open this module. The grid icon at the very top-left takes you back here at any time.

Chapter 3. Setting the hospital up, from start to end

Who does this chapter: the **Hospital Manager**. Do it once, in the order given. Each step depends on the one before it.

Where everything in this chapter lives: the **Hospital ► Configuration** menu, which only a Hospital Manager can see.

Step 0 — Create the user accounts

Before anything else, every member of staff who will log in needs a user account and a role.

1. Click the **grid icon** (top-left) ► **Settings ► Users & Companies ► Users**.
2. Click **New**. Type the person's name and their e-mail address (the e-mail is their login).
3. Scroll to the **Hospital** section of the access-rights list. Tick the role they need — the same names as in Chapter 2.
4. Save. Odoo sends them an invitation e-mail, or you can set a password yourself from the **Actions** menu on their user form.

Do not give everyone the Hospital Manager role. It bypasses the closing threshold and opens Configuration. Two or three people is normal.

Step 1 — Check the company details

Your hospital's name, address, phone and logo are printed on every invoice, prescription and patient card. Set them in **Settings ► Users & Companies ► Companies**, open your company, and fill in the address, phone, e-mail and logo.

Step 2 — Hospital settings

Menu: **Hospital ► Configuration ► Settings.**

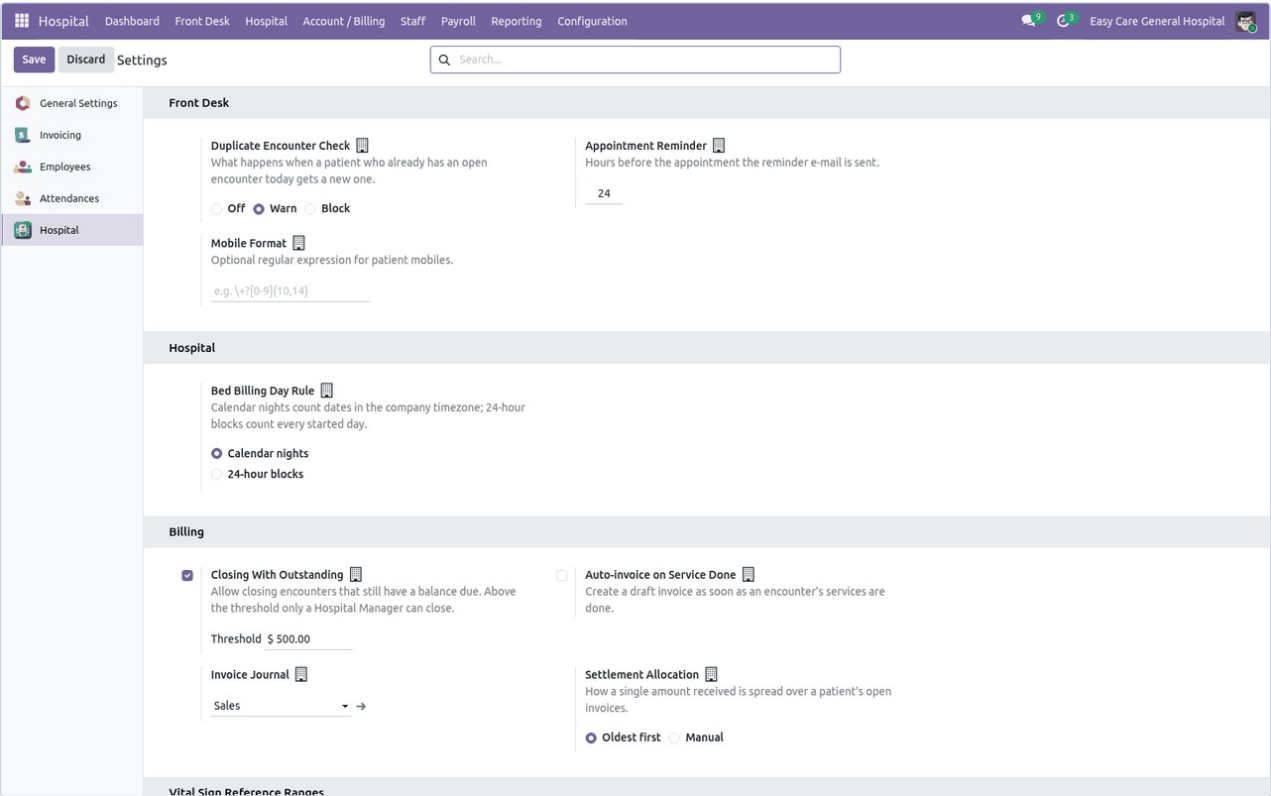


Figure 3.1 — The hospital settings page. Every switch here is explained below.

These settings are **per company**. Set them before you admit your first patient, because some of them change how money is calculated.

Setting	What it does	Suggested start value
Bed Billing Day Rule	<i>Calendar nights</i> counts the nights between the admission and discharge dates in your own timezone (minimum 1). <i>24-hour blocks</i> charges one day for every started 24 hours.	Calendar nights
Allow Closing With Outstanding	If off, nobody may close an encounter that still has a balance due.	On
Outstanding Threshold	An encounter whose balance due is above this amount needs a Hospital Manager to close it, and the manager must tick <i>Force Close</i> .	A small amount, e.g. 500
Auto-invoice on Service Done	When a visit reaches Service Done, the invoice is created automatically.	Off at first — switch on once billing is comfortable
Hospital Invoice Journal	The sales journal hospital invoices are booked into.	Your "Customer Invoices" journal
Settlement Allocation	How a lump-sum payment is spread over several unpaid invoices: <i>Oldest first</i> , or <i>Manual</i> (you type the split).	Oldest first
Duplicate Encounter Per Day	What happens when the front desk opens a second encounter for the same patient on the same day: <i>Off</i> , <i>Warn</i> (a message, but allowed) or <i>Block</i> (refused; only a manager may override).	Warn
Reminder Lead Time (hours)	How many hours before an appointment the reminder e-mail goes out.	24
Mobile Format (regex)	Optional. A pattern every patient mobile number must match, so the front desk cannot save a half-typed number. Leave empty if unsure.	empty
Vital sign reference ranges	The minimum and maximum for temperature, pulse, respiration, systolic and diastolic blood pressure, SpO2 and blood sugar. Anything outside these is flagged Abnormal in red on the vitals screen.	The adult defaults shown
Post Payslip Journal Entries	Whether confirming a payslip also posts an accounting entry.	Off unless your accountant asks for it
Payroll Journal	The miscellaneous journal those entries go to.	Your "Miscellaneous Operations" journal

Step 3 — Departments

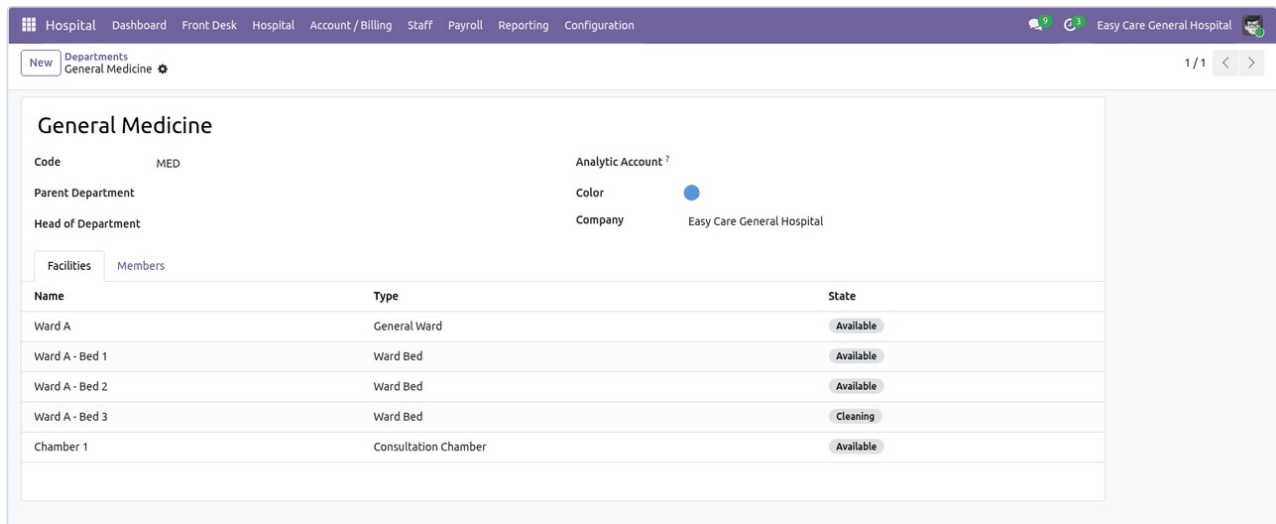
Menu: **Hospital ► Configuration ► Departments.**

A department is a clinical unit: General Medicine, Surgery, Paediatrics, Emergency. Departments group your staff, your beds and your revenue.

Complete Name	Code	Head of Department
☐ Emergency	ER	
☐ General Medicine	MED	
☐ General Surgery	SURG	
☐ Paediatrics	PAED	

Figure 3.2 — The departments you have created.

Click **New**, or click a row to open it.



General Medicine

Code: MED Analytic Account: ?

Parent Department: Color: ●

Head of Department: Company: Easy Care General Hospital

Facilities Members

Name	Type	State
Ward A	General Ward	Available
Ward A - Bed 1	Ward Bed	Available
Ward A - Bed 2	Ward Bed	Available
Ward A - Bed 3	Ward Bed	Cleaning
Chamber 1	Consultation Chamber	Available

Figure 3.3 — A department form.

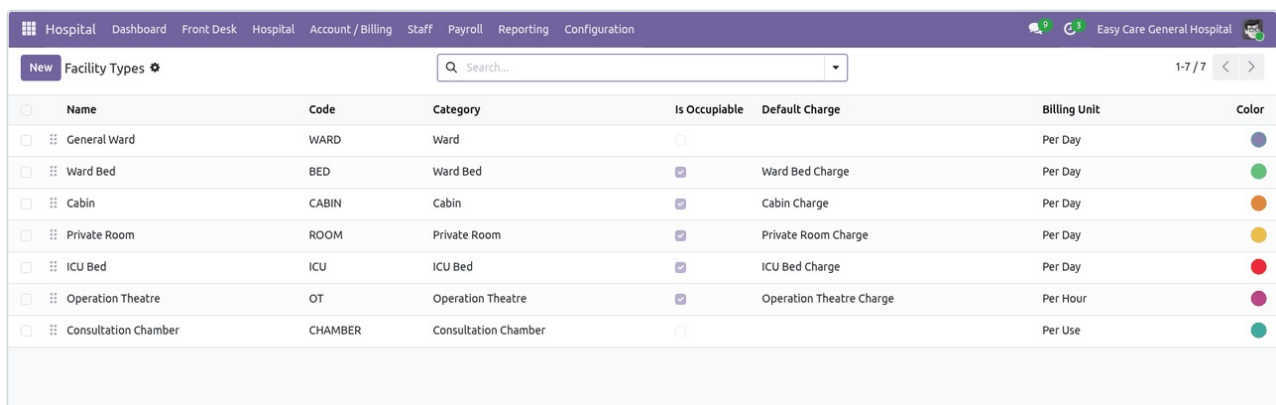
Field	What to put in it
Name	The department name, e.g. <code>General Medicine</code> .
Code	A short unique code, e.g. <code>MED</code> . It must be unique in your company.
Parent Department	Leave empty for a top-level department. Fill it to make a sub-department (e.g. <i>Surgery / Orthopaedics</i>).
Head of Department	The staff member in charge. Optional, and can be set later once staff exist.
Analytic Account	Optional, for accountants: every invoice line of this department is tagged with this analytic account, so you can report profit per department.
Colour	The colour this department gets on boards and calendars.
Facilities / Members	Read-only lists; they fill themselves as you create beds and staff.

Tip. Create four or five departments only. You can always add more. A department you no longer use should be **archived**, not deleted.

Step 4 — Facility types

Menu: **Hospital ► Configuration ► Facility Types**.

A facility type is the *kind* of place a patient can be in. The module already ships with seven ready-made types: Ward, Ward Bed, Cabin, Private Room, ICU, Operation Theatre and Consultation Chamber. In most hospitals you never need to add another one — you only need to check the price and the billing unit.



Name	Code	Category	Is Occupiable	Default Charge	Billing Unit	Color
General Ward	WARD	Ward	☐		Per Day	●
Ward Bed	BED	Ward Bed	☒	Ward Bed Charge	Per Day	●
Cabin	CABIN	Cabin	☒	Cabin Charge	Per Day	●
Private Room	ROOM	Private Room	☒	Private Room Charge	Per Day	●
ICU Bed	ICU	ICU Bed	☒	ICU Bed Charge	Per Day	●
Operation Theatre	OT	Operation Theatre	☒	Operation Theatre Charge	Per Hour	●
Consultation Chamber	CHAMBER	Consultation Chamber	☐		Per Use	●

Figure 3.4 — The seven facility types that ship with the module.

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration							9 3 Easy Care General Hospital
New	Facility Types	Search...					1-7 / 7
☐	Name	Code	Category	Is Occupiable	Default Charge	Billing Unit	Color
☐	General Ward	WARD	Ward	☐		Per Day	
☐	Ward Bed	BED	Ward Bed	☒	Ward Bed Charge	Per Day	
☐	Cabin	CABIN	Cabin	☒	Cabin Charge	Per Day	
☐	Private Room	ROOM	Private Room	☒	Private Room Charge	Per Day	
☐	ICU Bed	ICU	ICU Bed	☒	ICU Bed Charge	Per Day	
☐	Operation Theatre	OT	Operation Theatre	☒	Operation Theatre Charge	Per Hour	
☐	Consultation Chamber	CHAMBER	Consultation Chamber	☐		Per Use	

Figure 3.5 — A facility type.

Field	What it means
Name / Code	Display name and a unique short code.
Category	One of: Cabin, Private Room, Ward, Ward Bed, ICU Bed, Operation Theatre, Consultation Chamber, Other. The category is what the board and the reports group by, so choose it correctly.
Occupiable	Tick it if a patient can be assigned here. A <i>Ward</i> itself is usually not occupiable — its beds are.
Default Charge	The hospital service that will be billed for a stay in this kind of place. New facilities of this type inherit it.
Billing Unit	<i>Per Day, Per Hour or Per Use</i> . A cabin is normally per day; an operation theatre is normally per use or per hour.
Colour / Sequence	Appearance and ordering on the board.

Step 5 — Facilities: your actual beds and rooms

Menu: **Hospital ► Configuration ► Facilities**.

This is where you type your real building: every cabin, every ward, every bed in that ward, every ICU bed, every operation theatre and every doctor's chamber.

Hospital

Dashboard

Front Desk

Hospital

Account / Billing

Staff

Payroll

Reporting

Configuration

9

3

Easy Care General Hospital

New

Facilities

Q

Search...

1-10 / 10

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☐	Code	Name	Type	Parent (Ward)	Department	Current Patient	Charge Amount	State	
☐	WA	Ward A	General Ward		General Medicine		\$ 0.00	Available	
☐	WA-01	Ward A - Bed 1	Ward Bed	Ward A	General Medicine		\$ 800.00	Available	
☐	WA-02	Ward A - Bed 2	Ward Bed	Ward A	General Medicine		\$ 800.00	Available	
☐	WA-03	Ward A - Bed 3	Ward Bed	Ward A	General Medicine		\$ 800.00	Cleaning	
☐	C201	Cabin 201	Cabin		General Surgery	Abdul Karim	\$ 2,500.00	Occupied	
☐	C202	Cabin 202	Cabin		General Surgery		\$ 2,500.00	Maintenance	
☐	R301	Private Room 301	Private Room				\$ 4,000.00	Available	
☐	ICU-1	ICU Bed 1	ICU Bed		Emergency		\$ 10,000.00	Available	
☐	OT-1	Operation Theatre 1	Operation Theatre		General Surgery		\$ 3,000.00	Available	
☐	CH-1	Chamber 1	Consultation Chamber		General Medicine		\$ 0.00	Available	

Figure 3.6 — The facility list. Notice that ward beds are listed under their ward.

Figure 3.7 — One bed.

The order to create them in: first the ward (as a *Ward* type), then each bed inside it (as a *Ward Bed* type, with **Parent (Ward)** pointing at the ward).

Field	What to put in it
Name	What staff call it out loud: Ward A - Bed 1, Cabin 201.
Code	A short unique code, e.g. WA-01. Unique per company; it is what the board shows in big letters.
Type	The facility type from Step 4. This drives the price, the billing unit and the icon.
Parent (Ward)	For a bed: the ward it stands in. Empty for a standalone cabin or room.
Department	Which department this place belongs to. Used for grouping on the board and in reports.
Building / Floor	Free text. The Facility Board groups by building and floor by default, so filling these makes the board readable.
Capacity	How many patients fit at once. 1 for a bed or cabin. A <i>Ward</i> row may have the number of beds. Must be at least 1.
Charge Service	The service invoiced for a stay here. Filled automatically from the type; you may override it for a deluxe cabin.
Charge Amount	The price per billing unit. Filled from the service price; override it per facility.
Billing Unit	Per day / per hour / per use, inherited from the type.
Status	Not a typed field: it is the ribbon across the top of the form (Available ► Reserved ► Occupied ► Cleaning) plus the Cleaning and Maintenance buttons on the top-left. A new facility starts as <i>Available</i> ; after that the system and the housekeeping board keep it up to date.
Oxygen / Air Conditioning / TV / Attached Bath	Amenities. They show as small icons on the board and help the front desk pick a cabin for a patient.
Note	Anything else.

Rule the system enforces for you. You cannot mark an occupied bed as Available, Cleaning or Maintenance while a patient is still in it, and you cannot mark an empty bed as Occupied by hand. Assign or discharge a patient instead. This is what keeps the bed board honest.

Step 6 — Encounter stages (the columns of the Reception Board)

Menu: **Hospital ► Configuration ► Encounter Stages.**

Stages are the **columns** you will see on the Reception Board. Five ship ready to use: **Waiting, With Doctor, In Procedure / Admitted, Ready to Bill** and **Done**.

Hospital

Dashboard

Front Desk

Hospital

Account / Billing

Staff

Payroll

Reporting

Configuration

9

3

Easy Care General Hospital

New

Encounter Stages

Q

Search...

1-5 / 5

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☐	Name	Code	Moves Encounter To	Closing Stage	Folded in Ka...	Color	
☐	Waiting	WAIT	Open	☐	☐		
☐	With Doctor	DOC	In Progress	☐	☐		
☐	In Procedure / Admitted	PROC		☐	☐		
☐	Ready to Bill	BILL	Service Done	☐	☐		
☐	Done	DONE	Closed	☒	☒		

Figure 3.8 — The five stages that ship with the module.

Field	What it means
Name	The column heading.
Sequence	Left-to-right order of the columns.
Moves Encounter To	The powerful one. When somebody drags a card into this column, the encounter is also advanced to this state (Open, In Progress or Service Done). Leave empty for a column that is only a visual marker.
Folded in Kanban	Tick for columns that should start collapsed, such as <i>Done</i> .
Limited to Departments	Leave empty to use the stage everywhere; fill it to give one department its own columns.
Closing Stage / Colour / Description	Marks the end column, its colour, and a note for your staff.

Closing is never a drag. Dropping a card on a "closed" stage is refused on purpose, because closing checks the patient's balance. Use the **Close** button.

Step 7 — Hospital services: your price list

Menu: **Hospital ► Configuration ► Hospital Services.**

Everything you charge for is a **service**: the consultation fee, a dressing, an injection, a chest X-ray, a cabin day, the operation theatre. The module ships with fifteen common ones carrying **indicative prices** — go through them and replace every price with your own tariff before you bill a real patient, then add the services you are missing.

Hospital

Dashboard

Front Desk

Hospital

Account / Billing

Staff

Payroll

Reporting

Configuration

9

3

Easy Care General Hospital

New

Hospital Services

Q

Search...

1-15 / 15

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☐	Product Name	Internal Reference	Sales Price	Cost	
☐	☆ CBC (Complete Blood Count)		\$ 400.00	\$ 0.00	
☐	☆ Cabin Charge		\$ 2,500.00	\$ 0.00	
☐	☆ Doctor Consultation		\$ 500.00	\$ 0.00	
☐	☆ Dressing		\$ 200.00	\$ 0.00	
☐	☆ ECG		\$ 500.00	\$ 0.00	
☐	☆ Follow-up Consultation		\$ 300.00	\$ 0.00	
☐	☆ ICU Bed Charge		\$ 10,000.00	\$ 0.00	
☐	☆ Injection / IV Push		\$ 150.00	\$ 0.00	
☐	☆ Minor Procedure		\$ 1,500.00	\$ 0.00	
☐	☆ Operation Theatre Charge		\$ 3,000.00	\$ 0.00	
☐	☆ Private Room Charge		\$ 4,000.00	\$ 0.00	
☐	☆ RBS (Random Blood Sugar)		\$ 250.00	\$ 0.00	
☐	☆ Urine R/E		\$ 300.00	\$ 0.00	
☐	☆ Ward Bed Charge		\$ 800.00	\$ 0.00	
☐	☆ X-Ray Chest P/A		\$ 800.00	\$ 0.00	

Figure 3.9 — The service catalogue.

The screenshot displays the 'Doctor Consultation' product form in the Odoo Hospital Management System. The interface includes a top navigation bar with various hospital management modules. The main form is divided into tabs: 'General Information', 'Attributes & Variants', and 'Hospital'. The 'General Information' tab is active, showing fields for 'Product Type' (with 'Service' selected), 'Sales Price' (\$500.00), 'Sales Taxes' (15%), 'Cost' (\$0.00), 'Purchase Taxes' (15%), 'Category', 'Reference', and 'Company' (set to 'Visible to all'). An 'INTERNAL NOTES' section is at the bottom. The right sidebar features a chat window with 'OdooBot' and a message 'Product created'.

Figure 3.10 — One service. The hospital settings sit on the

General Information tab.

Field	What to put in it
Product Name	What the patient sees on the bill, e.g. Consultation - General.
Sales Price	Your charge. This is the price that lands on the encounter line.
Hospital Service	Must be ticked, otherwise it will not appear when staff add a service to an encounter. It is ticked automatically when you create the service from this menu.
Service Type	Consultation, Procedure, Bed / Room, Operation Theatre, Nursing, Investigation or Other. This drives the dashboards and the <i>Consultations</i> work list, so set it.
Hospital Department	Optional. Tags the revenue to a department.
Performed By Role	Optional. Whose job this normally is (doctor, nurse, technician...).
Customer Taxes	Any tax that applies. Leave empty if your hospital services are untaxed.

Consultation prices are special. If a doctor has their own consultation fee on their staff record, that fee wins over the price here. See Step 9.

Step 8 — Medicines and the clinical catalogues

These lists exist so that doctors and nurses can *choose* instead of *type*. Fill them with your own hospital's vocabulary; all of them are optional to start with and can be extended at any time.

Menu	What goes in it	Ships with data?
Configuration ► Medicines	Your formulary: Paracetamol 500 mg, Amlodipine 5 mg. Used by the prescription pad.	No — add your own
Configuration ► Allergies	Penicillin, peanut, latex... Attached to a patient, then shown as a red allergy warning whenever an encounter is opened for them.	No
Configuration ► Diagnoses	Your diagnosis list, with codes if you use ICD.	No
Configuration ► Procedures	Named procedures, each optionally linked to the service that bills it.	No
Configuration ► Symptoms	What patients complain of; used on the prescription.	Yes, 15 to start
Configuration ► Diagnostic Tests	Tests a doctor can advise on a prescription (CBC, X-ray chest...), each optionally linked to the service that bills it.	Yes, 10 to start

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration				Easy Care General Hospital	
New	Medicines	Search...		1-2 / 2	
☐	Product Name	Internal Reference	Sales Price	Cost	
☐	☆ Amlodipine 5 mg		\$ 8.00	\$ 0.00	
☐	☆ Paracetamol 500 mg		\$ 2.00	\$ 0.00	

Figure 3.11 — Medicines.

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration
Easy Care General Hospital

New
Medicines
Paracetamol 500 mg
Documents
0
1 / 1

Product
☆ Paracetamol 500 mg
Sales Purchase
General Information Attributes & Variants Hospital

Product Type ?
Goods Service Combo

Sales Price ? \$ 2.00
Sales Taxes ? 15% X (= \$ 2.30 Incl. Taxes)
Cost ? \$ 0.00
Purchase Taxes ? 15% X
Category
Reference
Barcode
Company Visible to all

INTERNAL NOTES
This note is only for internal purposes.

Send message Log note Activity
Today
OdooBot 8:37 AM
Product created

Figure 3.12 — A medicine. Tick

Medicine and give it a sales price if you also sell it.

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration				Easy Care General Hospital	
New	Allergies	Search...		1-2 / 2	
☐	Name	Code	Category	Color	
☐	Peanut		Food	Yellow	
☐	Penicillin		Drug	Red	

Figure 3.13 — Allergies. The

Category (drug, food, environment, other) and the colour decide how the warning looks.

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration				Easy Care General Hospital	
New	Diagnoses	Search...		1-3 / 3	
☐ Code	Name	Category			
☐ DX-001	Fever, unspecified	General			
☐ DX-002	Essential hypertension	Cardiovascular			
☐ DX-003	Acute appendicitis	Digestive			

Figure 3.14 — Diagnoses. A diagnosis with a code is displayed as [CODE] Name.

Hospital

Dashboard

Front Desk

Hospital

Account / Billing

Staff

Payroll

Reporting

Configuration

Easy Care General Hospital

New

Procedures

Q

Search...

Code

Name

Category

Charge Service

Figure 3.15 — Procedures. Link each one to its

Charge Service so billing is automatic.

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration				Easy Care General Hospital	
New	Symptoms	Search...		1-15 / 15	
☐ Code	Name	Category			
☐ SYM-001	Fever	General			
☐ SYM-002	Headache	Neurological			
☐ SYM-003	Cough	Respiratory			
☐ SYM-004	Sore throat	Respiratory			
☐ SYM-005	Shortness of breath	Respiratory			
☐ SYM-006	Chest pain	Cardiovascular			
☐ SYM-007	Abdominal pain	Gastrointestinal			
☐ SYM-008	Nausea / vomiting	Gastrointestinal			
☐ SYM-009	Diarrhoea	Gastrointestinal			
☐ SYM-010	Dizziness	Neurological			
☐ SYM-011	Fatigue / weakness	General			
☐ SYM-012	Loss of appetite	General			
☐ SYM-013	Joint pain	Musculoskeletal			
☐ SYM-014	Back pain	Musculoskeletal			
☐ SYM-015	Skin rash	Dermatological			

Figure 3.16 — Symptoms, used on the prescription pad.

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration					Easy Care General Hospital	
New	Diagnostic Tests				Search...	1-10 / 10
☐	Code	Name	Category	Sample Type	Charge Service	
☐	DT-001	CBC (Complete Blood Count)	Pathology	Blood	CBC (Complete Blood Count)	
☐	DT-002	RBS (Random Blood Sugar)	Pathology	Blood	RBS (Random Blood Sugar)	
☐	DT-003	Urine R/E	Pathology	Urine	Urine R/E	
☐	DT-004	X-Ray Chest P/A	Radiology		X-Ray Chest P/A	
☐	DT-005	ECG	Cardiology		ECG	
☐	DT-006	Serum Creatinine	Pathology	Blood		
☐	DT-007	Lipid Profile	Pathology	Blood		
☐	DT-008	Ultrasonography of Whole Abdomen	Radiology			
☐	DT-009	Blood Grouping & Rh Typing	Pathology	Blood		
☐	DT-010	Thyroid Function Test (TSH)	Pathology	Blood		

Figure 3.17 — Diagnostic tests.

Sample Type and Category are free text; fill them the way your lab speaks.

What this module does not do. Advising a test on a prescription does **not** create a lab order and does **not** enter a result. Tests are printed on the prescription; if you charge for one, it is added to the encounter as a service like anything else.

Step 9 — Staff, specialties and shifts

Menu: **Hospital ► Staff**. (The Staff Officer normally owns this menu; the manager sets it up the first time.)

9a. Specialties

Staff ► Specialties is a simple list of medical specialties (Cardiology, Orthopaedics...). Fourteen ship with the module; add or rename as you like.

Hospital Dashboard Staff Payroll Reporting					Easy Care General Hospital	
New	Specialties				Search...	1-14 / 14
☐	Name	Code	Color			
☐	General Medicine					
☐	General Surgery					
☐	Paediatrics					
☐	Obstetrics & Gynaecology					
☐	Cardiology					
☐	Orthopaedics					
☐	Neurology					
☐	ENT					
☐	Ophthalmology					
☐	Dermatology					
☐	Anaesthesiology					
☐	Radiology					
☐	Emergency Medicine					
☐	Nursing					

Figure 3.18 — Specialties.

9b. Staff members

Staff ► Staff shows everyone who works in the hospital.

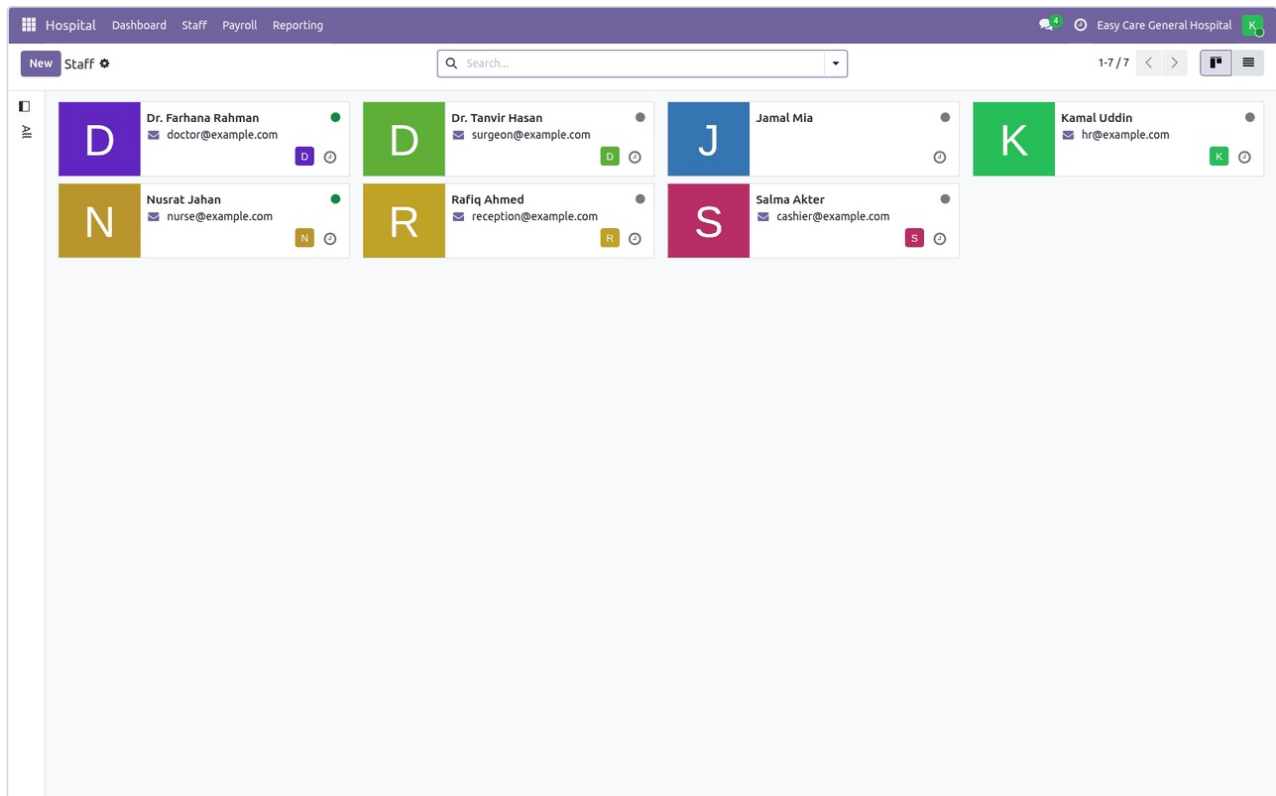


Figure 3.19 — Staff, shown as cards.

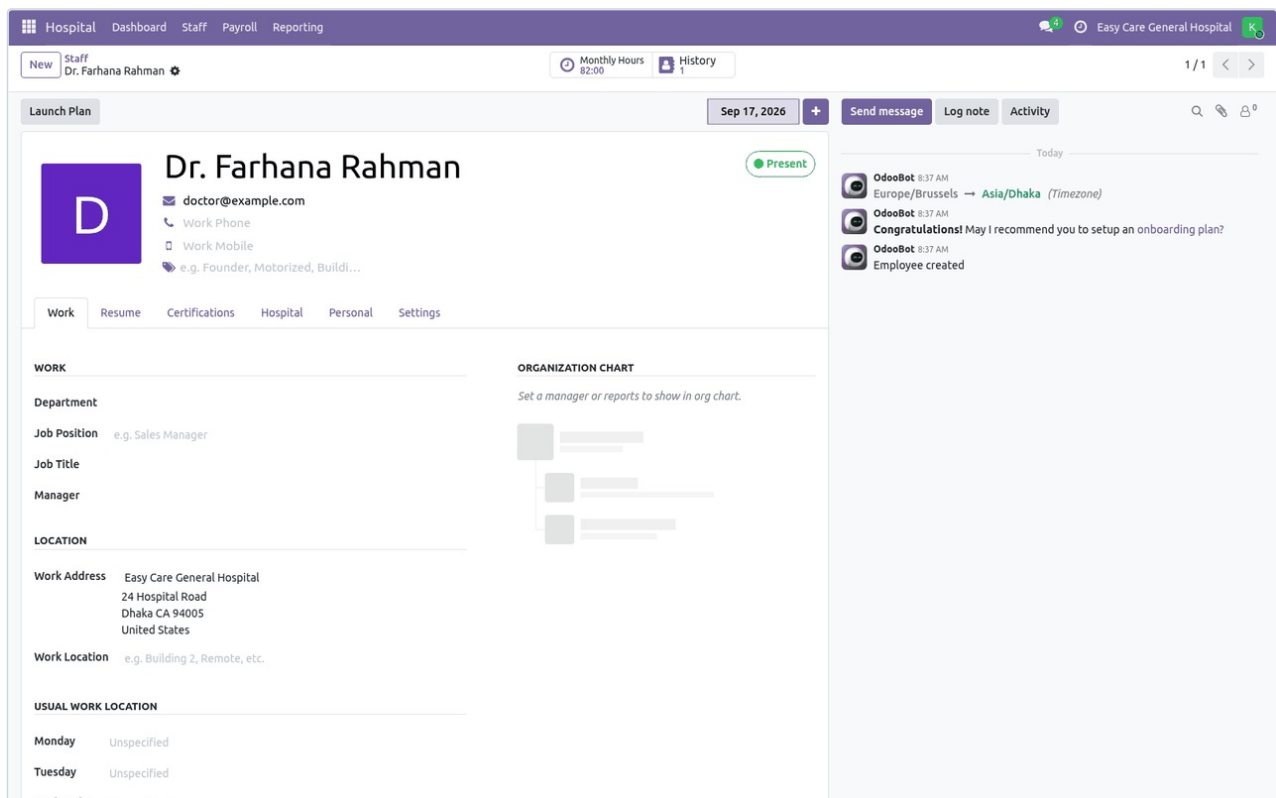


Figure 3.20 — A doctor's record. The hospital fields are on the

HR Settings and Hospital areas of the employee form.

Click **New** and fill in at least the following.

Field	What to put in it	Who can see it
Employee Name	The person's name as patients should see it, e.g. Dr. Farhana Rahman .	everyone
Related User	The login account from Step 0. This link is essential: without it the doctor cannot see "my encounters", and attendance and payroll will not find the person.	HR
Hospital Staff	Must be ticked. Everything hospital-related is filtered on this flag.	everyone
Hospital Role	Doctor, Nurse, Operator / Technician, Ward Boy, Administrator, Receptionist, Accountant or Other. Only people whose role is Doctor can be chosen as the doctor on an encounter or appointment.	everyone
Hospital Department	Their home department. It becomes the default department on encounters they open.	everyone
Qualification	Printed under the doctor's name on the prescription, e.g. MBBS, FCPS (Medicine) .	everyone
Appointment Slot (hours)	How long one appointment with this doctor lasts. 0.25 means 15 minutes.	everyone
Max Patients / Day	Optional. The front desk gets a warning (not a block) when the doctor is already fully booked that day.	everyone
Specialties	From 9a.	HR only
Licence Number / Licence Expiry	The practising licence. Thirty days before expiry the system automatically raises a to-do activity for the Staff Officer.	HR only
Consultation Service	Which service is charged when this doctor consults. Used automatically at check-in.	HR only
Consultation Fee	This doctor's own fee. It overrides the price on the service.	HR only
Follow-up Fee	A second, lower fee you may use for revisits.	HR only
Commission (%)	The share of what this person performs that is paid to them in payroll.	HR only
Usual Shifts	Which shifts they normally work. A convenience for building the roster.	HR only
Photo	Upload it. The photo is copied to their user account automatically, so their face appears on kanban cards and chat.	everyone

Staff ► Doctors is the same list already filtered to doctors — the fastest way to find a consultant.

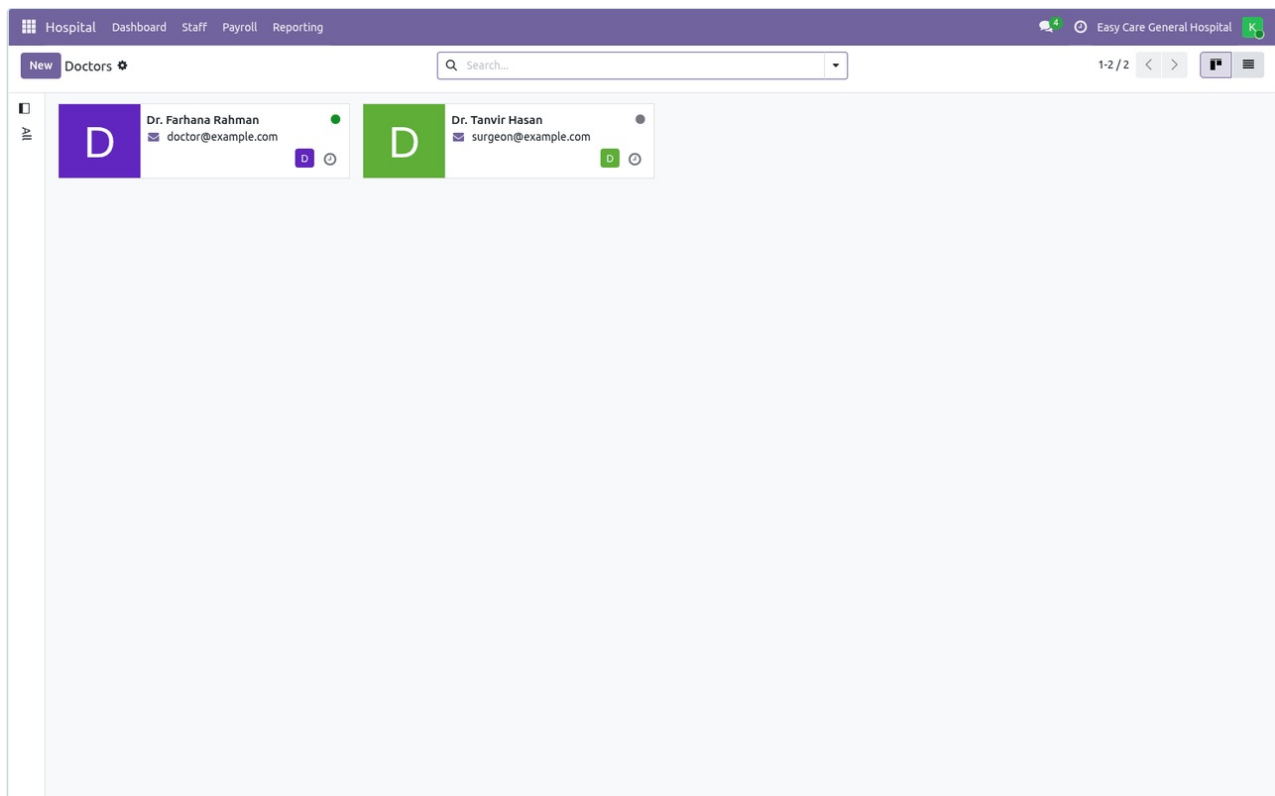


Figure 3.21 — Doctors only.

9c. Shifts

Staff ► Shifts defines your duty shifts once: Morning, Evening, Night.

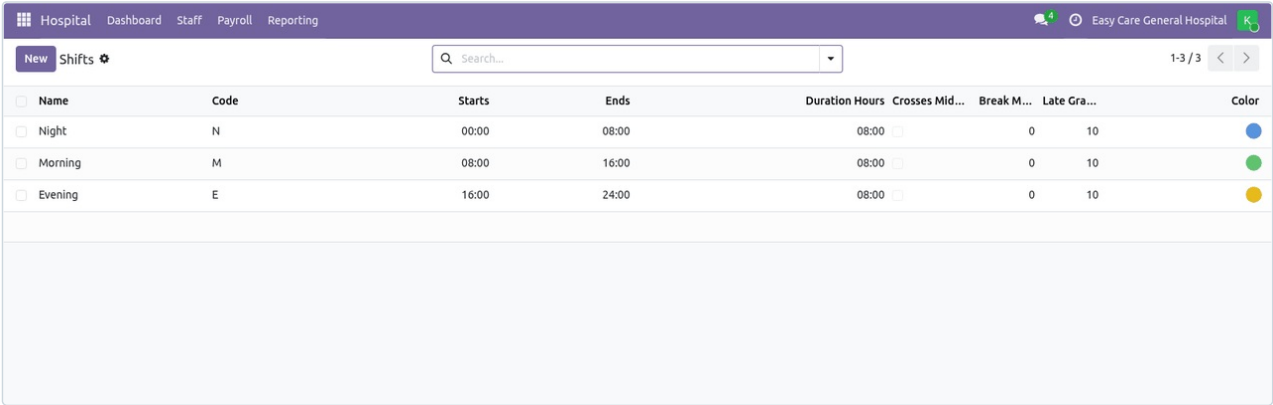


Figure 3.22 — Shifts.

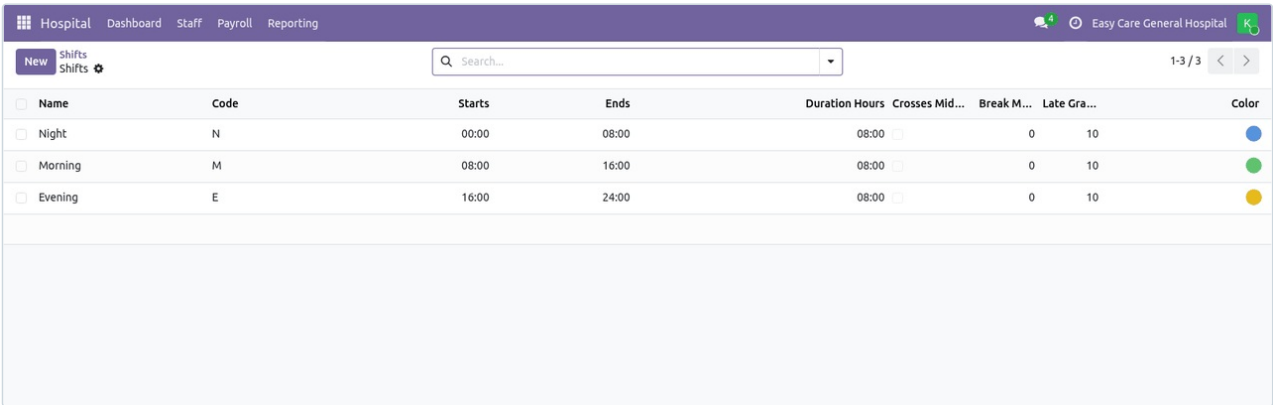


Figure 3.23 — The Morning shift, 08:00 to 16:00.

Field	What it means
Name / Code	Morning / M.
Starts / Ends	As a 24-hour clock. A shift that ends at or before it starts (e.g. 22:00 → 06:00) is understood as crossing midnight , and the <i>Crosses Midnight</i> and <i>Duration</i> fields update themselves.
Break (minutes)	Deducted from the planned hours when overtime is calculated.
Late Grace (min)	How many minutes late is still "on time". Beyond this, the attendance is flagged Late .
Colour	The colour of the shift on the roster board.

Step 10 — The duty roster

Menu: **Staff ► Roster**. One row = *this person works this shift on this day*.

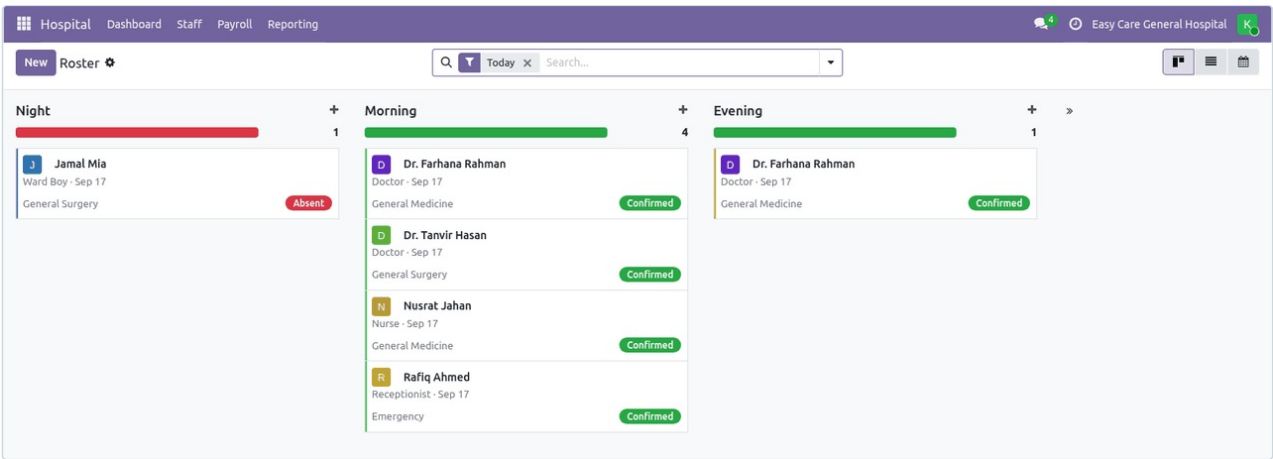


Figure 3.24 — The roster, as drag-and-drop cards.

The screenshot shows the 'Mark Absent' form in the Easy Care General Hospital system. The form is for staff member Rafiq Ahmed, Receptionist, on Sep 7, Morning shift. It includes fields for Department (Emergency), Ward / Area, and Note. The status is set to 'Done'.

Figure 3.25 — One roster line.

Field	What it means
Staff	Who works. Only hospital staff can be picked.
Shift	Which shift, from Step 9c.
Date	Which day.
Department	Filled from the person's department; you may change it.
Ward / Area	Optional: which ward or area they cover that day.
Status	Planned → Confirmed → Done, or Absent .

The system refuses to roster the same person on two overlapping shifts, and refuses the same person twice on the same shift and day.

Why the roster matters more than it looks. Two things depend on it: 1. **Appointments.** Unless you are a Hospital Manager, you can only book an appointment inside a roster line of that doctor. On a brand-new database, create shifts and a roster *before* trying to book. 2. **Payroll.** Lateness, overtime and absence are all measured against the roster. No roster, no overtime.

Step 11 — Payroll setup

Menu: **Hospital ► Payroll**. This module carries its own small payroll, so you do not need any other payroll app.

11a. Salary rule categories, rules and structures

The module ships with one complete, working structure called **Hospital Staff Structure**, containing seven rules, in this calculation order: **Basic Salary** (BASIC), **Allowances** (ALW), **Overtime** (OT), **Doctor Commission** (COMM), **Gross Salary** (GROSS), **Absence Deduction** (ABS) and **Net Salary** (NET). **Most hospitals never need to change them.**

The screenshot shows the 'Salary Structures' table in the Easy Care General Hospital system. The table has columns: Name, Code, Parent Structure, and Rule Co... The only entry is 'Hospital Staff Structure' with Code 'HMS_STD', Parent Structure, and Rule Co... 7.

Figure 3.26 — Salary structures.

Hospital Staff Structure

Code: HMS_STD Journal

Parent Structure ?

Name	Code	Category	Amount Select
Basic Salary	BASIC	Basic	Python Code
Allowances	ALW	Allowance	Python Code
Overtime	OT	Allowance	Python Code
Doctor Commission	COMM	Allowance	Python Code
Gross Salary	GROSS	Gross	Python Code
Absence Deduction	ABS	Deduction	Python Code
Net Salary	NET	Net	Python Code

[Add a line](#)

Basic + allowances + roster overtime + doctor commission - absence deduction.

Figure 3.27 — The structure and its rules, in calculation order.

Salary Rules

Search...

Name	Code	Category	Structure	Condition Select	Amount Select
Basic Salary	BASIC	Basic	Hospital Staff Structure	Always True	Python Code
Allowances	ALW	Allowance	Hospital Staff Structure	Python Expression	Python Code
Overtime	OT	Allowance	Hospital Staff Structure	Python Expression	Python Code
Doctor Commission	COMM	Allowance	Hospital Staff Structure	Python Expression	Python Code
Gross Salary	GROSS	Gross	Hospital Staff Structure	Always True	Python Code
Absence Deduction	ABS	Deduction	Hospital Staff Structure	Python Expression	Python Code
Net Salary	NET	Net	Hospital Staff Structure	Always True	Python Code

Figure 3.28 — The salary rules.

Basic Salary

Code ? BASIC Sequence 10

Category Basic Appears On Payslip ☒

Structure Hospital Staff Structure Active ☒

Condition Amount Accounting Notes

Condition Select ☒ Always True

☐ Range

☐ Python Expression

Figure 3.29 — The Basic Salary rule.

If you do need to change a rule, these are its fields:

Field	What it means
Name / Code	The code is how later rules refer to this one, e.g. <code>rules.BASIC</code> .
Sequence	Calculation order. Lower runs first; Gross and Net must run last.
Category	Which bucket the amount falls into (Basic, Allowance, Deduction...).
Condition	<i>Always True</i> , a numeric <i>Range</i> , or a small <i>Python Expression</i> that sets <code>result</code> to true or false.
Amount Type	<i>Fixed Amount</i> , <i>Percentage</i> of something, or <i>Python Code</i> .
Python Code	Sets <code>result</code> . Available to it: <code>payslip</code> , <code>contract</code> , <code>employee</code> , <code>worked_days</code> , <code>inputs</code> , <code>categories</code> , <code>rules</code> , and the maths helpers <code>floor</code> , <code>ceil</code> , <code>round</code> , <code>min</code> , <code>max</code> , <code>abs</code> .
Appears on Payslip	Untick for intermediate working lines you do not want printed.
Debit / Credit Account	Only used when you switch on <i>Post Payslip Journal Entries</i> .

Security note for the manager. Salary rules can run small Python expressions. They run in a locked-down sandbox that cannot reach the database, and only Payroll Officers and Hospital Managers may edit them. Treat write access to salary rules like access to the safe.

Name	Code	Parent
☐ Basic	BASIC	
☐ Allowance	ALW	
☐ Gross	GROSS	
☐ Deduction	DED	
☐ Net	NET	

Figure 3.30 — Rule categories.

11b. Staff contracts

Menu: **Payroll ► Contracts**. Every person you want to pay needs one running contract.

Name	Employee	Role	Department	Date Start	Date End	Wage	State
☐ Reception contract - Rafiq Ahmed	Rafiq Ahmed	Receptionist	Emergency	Mar 17		\$ 25,000.00	Running
☐ Nurse contract - Nusrat Jahan	Nusrat Jahan	Nurse	General Medicine	Jan 17		\$ 35,000.00	Running
☐ Doctor contract - Dr. Farhana Rahman	Dr. Farhana Rahman	Doctor	General Medicine	Sep 17, 2025		\$ 120,000.00	Running
						\$ 180,000.00	

Figure 3.31 — Contracts.

Doctor contract - Dr. Farhana Rahman

Employee: Dr. Farhana Rahman, Role: Doctor, Department: General Medicine, Job Title: , Structure: Hospital Staff Structure, Date Start: Sep 17, 2025, Date End: , Trial Period End:

SALARY

Wage	\$ 120,000.00	Working Days Per Month	26.00
Hourly Rate	\$ 576.92	Working Hours Per Day	8.00
Overtime Rate Multiplier	1.50	Allowance Total	\$ 35,000.00

Allowances

Name	Amount	Is Taxable
House rent	\$ 30,000.00	☒
Transport	\$ 5,000.00	☐
		\$ 35,000.00

Figure 3.32 — A doctor's contract with two allowances.

Field	What to put in it
Name	Free text, e.g. Doctor contract - Dr. Farhana Rahman .
Employee	The staff member. Hospital staff only.
Salary Structure	<i>Hospital Staff Structure</i> unless you built your own.
Wage	The monthly basic wage.
Working Days / Month and Working Hours / Day	Used to derive the hourly rate; the defaults are 26 and 8.
Hourly Rate	Calculated for you (wage ÷ days ÷ hours). You may override it.
Overtime Rate Multiplier	1.5 means overtime is paid at one-and-a-half times the hourly rate.
Start Date / End Date	End Date empty means open-ended.
Trial Period End	Informational.
Status	New → Running → Expired / Cancelled. A payslip only finds a contract whose status is Running.
Allowances	Add a line per allowance: name, amount, and whether it is taxable. They are added on top of the wage.

The system refuses two *Running* contracts for the same person in overlapping periods.

Step 12 — Easy Hospital Management AI Assist (optional)

Menu: **Configuration ► AI ► AI Providers**. The module ships with four small AI-assisted features (see 11.4) that are all switched off until you do two things: configure a provider here, and turn the feature on in Settings.

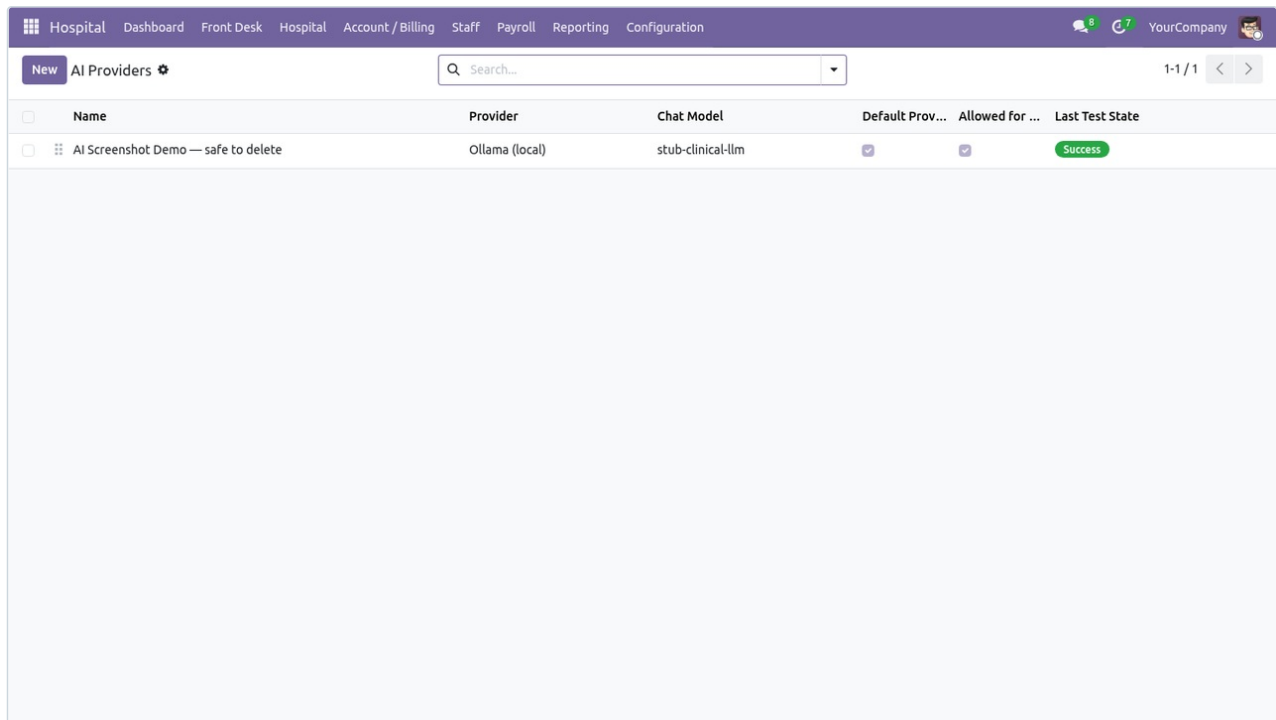


Figure 3.33 — AI Providers. None shipped by default; add at least one.

Click **New** and fill in:

Field	What to put in it
Provider	<i>Ollama (local)</i> , <i>OpenAI (ChatGPT)</i> or <i>Anthropic (Claude)</i> . Ollama is the safest default: it runs on your own network, so patient data never leaves the hospital.
Default Provider	Tick this on the one provider the 4 AI features should actually use. Only one active provider may be the default.
Base URL	Where the provider listens, e.g. <code>http://localhost:11434</code> for a local Ollama install.
Chat Model	The exact model name the provider serves, e.g. <code>llama3.2:3b</code> . Use Refresh Models (Ollama only) to list what your local server has pulled.
API Key (OpenAI / Anthropic only)	Paste your key once and save. It never displays again — the field always reads back blank, and a small note under it says only "A key is currently stored." This is deliberate: the key is stored in a place even a Hospital Manager cannot read back through the web client. To rotate it, paste a new one over the blank field; leaving it blank keeps the current key.
Allowed for Restricted Data	Whether this provider may receive patient/clinical text. Always on and locked for Ollama (it is local). Off by default for OpenAI/Anthropic — tick it only if your data policy allows sending patient data to that cloud provider.

AI Screenshot Demo (OpenAI) — safe to delete

Provider	OpenAI (ChatGPT)	Base URL	https://api.openai.com/v1
Active	☒	Chat Model ?	gpt-4o-mini
Default Provider ?	☐	Timeout (s)	60
Sequence	10	Allowed for Restricted Data ?	☐
Company	YourCompany		

MODEL PARAMETERS

Send Temperature	☒	Organization ID ?	
Temperature	0.20	System Message Role ?	system
Max Output Tokens	0		
Context Window ?	32,000		

API KEY

API Key ? Never re-shown once saved. Leave blank to keep the current key.

A key is currently stored.

Figure 3.34 — An OpenAI provider after saving a key: the API Key field is blank and "A key is currently stored" confirms it took.

Click **Test Connection** (top of the form) to check the provider actually answers before relying on it. The result and its timestamp are kept on the form so you can see when it last succeeded.

AI Screenshot Demo — safe to delete

Provider	Ollama (local)	Base URL	http://127.0.0.1:11499
Active	☒	Chat Model ?	stub-clinical-llm
Default Provider ?	☒	Timeout (s)	30
Sequence	10	Allowed for Restricted Data ?	☒
Company	YourCompany		

MODEL PARAMETERS

Send Temperature	☒
Temperature	0.20
Max Output Tokens	0
Context Window ?	4,096

LAST CONNECTION TEST

Last Test State	Success
Last Test Message	OK (4 ms): Ollama 0.1.0-stub
Last Test Date	Sep 19, 1:38 PM

Figure 3.35 — Test Connection succeeded; the result and timestamp are saved on the provider.

Finally, open **Configuration ► Settings ► AI** and tick **Enable AI Features**. The Settings page itself says it plainly: "Discharge summary drafts, prescription test suggestions, vitals trend narration and the dashboard natural-language query. API keys are configured on each AI provider, never here."

Every AI call is logged. Whichever feature is used, and whichever provider answers, the call is written to an append-only entry in **Configuration ► AI ► AI Usage Log** — who asked, which provider, how many tokens, how long it took, and whether it succeeded. Nobody, including a Hospital Manager, can edit or delete a log entry from the screen.

Chapter 4. Your setup checklist

Print this page and tick it off.

#	Step	Menu	Done
1	Users created, roles ticked	Settings ► Users	☐
2	Company name, address, logo	Settings ► Companies	☐
3	Hospital settings reviewed	Configuration ► Settings	☐
4	Departments created	Configuration ► Departments	☐
5	Facility types priced	Configuration ► Facility Types	☐
6	Every bed, cabin, ward, ICU, OT and chamber typed in	Configuration ► Facilities	☐
7	Stage columns checked	Configuration ► Encounter Stages	☐
8	Services priced	Configuration ► Hospital Services	☐
9	Medicines and catalogues filled	Configuration ► Medicines / Allergies / ...	☐
10	Staff created and linked to users	Staff ► Staff	☐
11	Shifts defined	Staff ► Shifts	☐
12	This week's roster entered	Staff ► Roster	☐
13	Contracts set to Running	Payroll ► Contracts	☐
14	A test patient registered, billed and closed	Front Desk	☐
15	(Optional) AI provider configured and tested, AI toggled on	Configuration ► AI / Settings	☐

When step 14 works end to end, you are live. Step 15 is optional — the hospital runs completely normally without it.

Part 2 — The daily chapters, one per role

From here on, each chapter belongs to one job. Read your own and skip the rest.

- **Chapter 5 — Receptionist:** registration, encounters, appointments, the queue.
- **Chapter 6 — Nurse:** the bed board, admissions, vital signs, delivering services.
- **Chapter 7 — Doctor:** consultations, diagnoses, prescriptions, finishing a visit.
- **Chapter 8 — Billing Officer:** invoices, payments, deposits, settlement, closing.
- **Chapter 9 — Staff Officer:** staff records, shifts, roster, attendance.
- **Chapter 10 — Payroll Officer:** contracts, payslips, batches.
- **Chapter 11 — Everybody:** the dashboard, the analyses and the printed documents.

Chapter 5. The Receptionist's day

Your menu: Hospital ► Front Desk. You also have the Dashboard and Reporting menus. You will not see Account / Billing, Staff or Payroll — that is deliberate, not a fault.

Your job, in one line: **every patient who walks in must end up with an open encounter attached to the right doctor.**

5.1 The Reception Board — your home screen

Menu: **Front Desk ► Reception Board.**

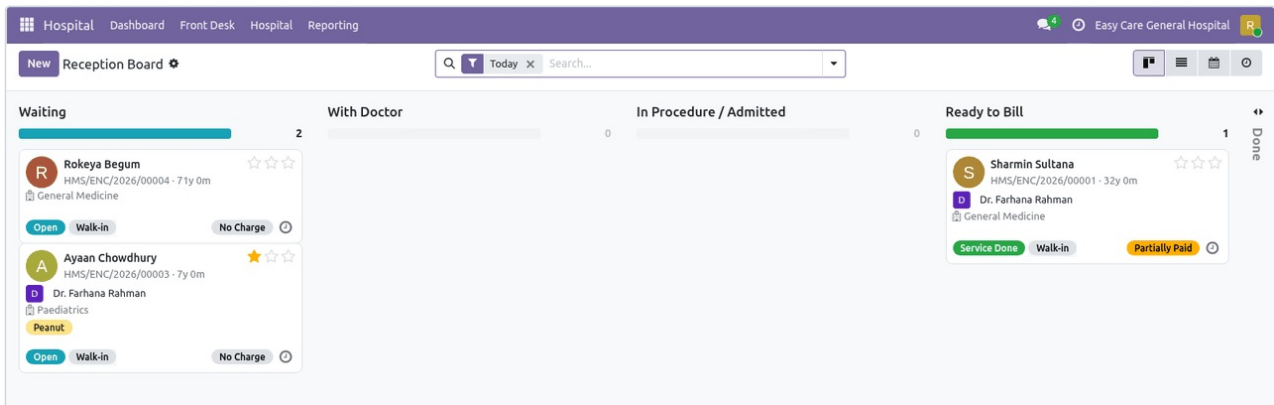


Figure 5.1 — The Reception Board. Each card is one visit that is happening today.

- Each **card** is an encounter. It shows the patient's initials or photo, their name, the visit reference, the age, the department, the doctor, any **allergy** as a coloured tag, the priority stars, the state and the payment state.
- Each **column** is a stage: Waiting, With Doctor, In Procedure / Admitted, Ready to Bill, and Done (which starts folded on the right-hand edge — click it to open it).
- **Drag a card** from one column to the next as the patient moves through the hospital. Dragging also advances the visit's state, so you are not doing the work twice.
- The board shows **today** by default. To see another day, remove the *Today* filter in the search bar at the top.

Dragging a card onto a closing column is refused on purpose. Closing checks the money, so it is done from the encounter with the **Close** button — usually by Billing.

5.2 Registering a new patient

Menu: **Front Desk ► Patients ► New.**

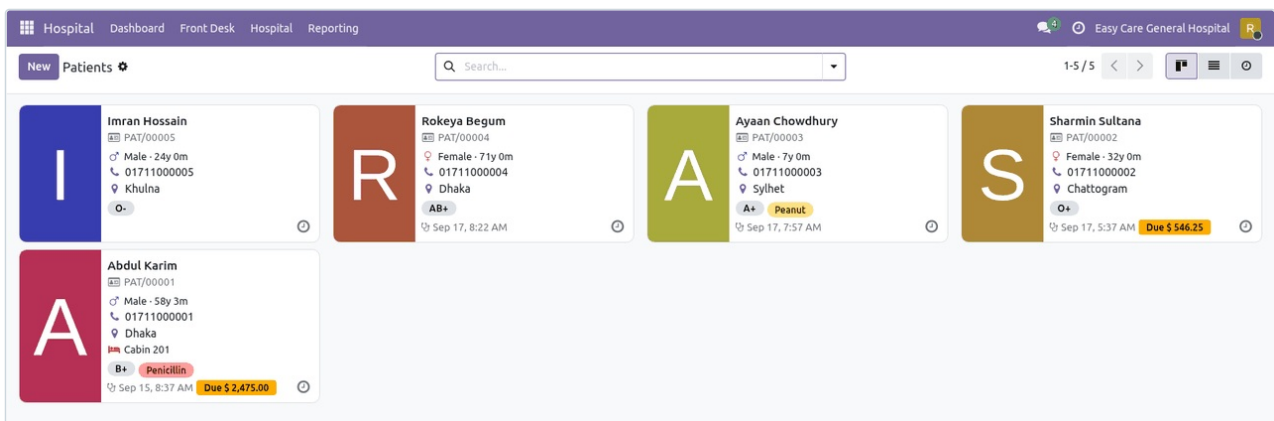


Figure 5.2 — Patients, shown as cards. The red tags are allergies; the amount at the bottom-right of a card is what the patient still owes.

Figure 5.3 — A blank patient form. Only six things are needed.

Figure 5.3 — A blank patient form. Only six things are needed.

Only six fields are required. Type these and press save:

Field	Required	Notes
Patient full name	✓	Exactly as on their ID.
Mobile	✓	If your manager set a mobile format, a wrong number is refused here.
Gender	✓	Male / Female / Other.
Date of Birth	—	Strongly recommended: the Age appears next to it automatically, and age is used by the dashboards. A future date is refused.
Street / City / Country	—	
Emergency Contact / Phone	—	Fill it for admitted patients.

The **Patient ID** (top-left, greyed out) is generated for you and never changes. That number is the patient's identity for life — write it on their card.

Figure 5.4 — A saved patient. Note the buttons across the top and the counters.

Figure 5.4 — A saved patient. Note the buttons across the top and the counters.

The rest of the patient form

Tab / area	What is in it
Personal	National ID (unique per company), marital status, second phone, e-mail, second address line, state, ZIP, the relation of the emergency contact, and the linked contact record used by accounting.
Medical	Blood group, Allergies , and a free Chronic Conditions box for surgical history, family history and long-term illness.
History	Every encounter this patient has ever had, with its total and its balance. Read-only.
Billing	Visible to Billing only: total outstanding and last visit.
Counters (top right)	Encounters, Appointments, Prescriptions, Admit History and (for Billing) Invoices. Click any of them to open that list.
New Encounter (button)	The fastest way to start a visit for a patient who is standing in front of you.
Print Card (button)	Prints the patient card with their barcode.

Never create a second record for the same person. Search first — you can search by **name, patient ID or mobile number**. A duplicate patient splits their history and their unpaid bills.

5.3 Opening an encounter (the core of your job)

Three ways, all ending in the same place:

1. From the patient form, click **New Encounter**.
2. From **Front Desk ► Encounters**, click **New**.
3. From an appointment, click **Check In** (see 5.5). This is the best way when the patient had booked.

Hospital

Dashboard

Front Desk

Hospital

Reporting

Easy Care General Hospital

New

Encounters

This Week

Search...

1-4 / 4

☐	Priority	Reference	Arrival	Patient	Doctor	Department	Total	Paid	Balance Due	Payment State	State
☐	☆☆☆☆	HMS/ENC/2026/00004	Sep 17, 8:22 AM	Rokeya Begum		General Medicine	\$ 0.00	\$ 0.00	\$ 0.00	No Charge	Open
☐	☆☆☆☆	HMS/ENC/2026/00003	Sep 17, 7:57 AM	Ayaan Chowdhury	Dr. Farhana Rahman	Paediatrics	\$ 0.00	\$ 0.00	\$ 0.00	No Charge	Open
☐	☆☆☆☆	HMS/ENC/2026/00001	Sep 17, 5:37 AM	Sharmin Sultana	Dr. Farhana Rahman	General Medicine	\$ 1,092.50	\$ 546.25	\$ 546.25	Partially Paid	Service Done
☐	☆☆☆☆	HMS/ENC/2026/00002	Sep 15, 8:37 AM	Abdul Karim	Dr. Tanvir Hasan	General Surgery	\$ 7,475.00	\$ 5,000.00	\$ 2,475.00	Partially Paid	In Progress
							\$ 8,567.50	\$ 5,546.25	\$ 3,021.25		

Figure 5.5 — Encounters.

Hospital Dashboard Front Desk Hospital Reporting Easy Care General Hospital

New Encounters HMS/ENC/2026/00001 Prescriptions 1/1

Print Summary **Cancel** **Draft** **Open** **In Progress** **Service Done** **Closed** **Send message** **Log note** **Activity**

HMS/ENC/2026/00001

Sharmin Sultana

01711000002
32y 0m
Female

Doctor Dr. Farhana Rahman **Arrival** Sep 17, 5:37 AM

Department General Medicine **Stage** Ready to Bill

Source ☒ Walk-in ☐ Appointment ☐ Referral ☐ Emergency **Priority** ☆☆☆ **Follow Up Date** Sep 22

Services **Facilities** **Clinical** **Notes**

Service	Description	Performed By	Quantity	Unit Price	Total	State
Doctor Consultati...	Doctor Consultati...	Dr. Farhana Rahman	1.00	\$ 800.00	\$ 920.00	Delivered
Injection / IV Push	Injection / IV Push	Nusrat Jahan	1.00	\$ 150.00	\$ 172.50	Delivered

Add a line

\$ 1,092.50

Untaxed: \$ 950.00
Taxes: \$ 142.50
Total: **\$ 1,092.50**
Paid: \$ 546.25
Balance Due: **\$ 546.25**
Payment State: **Partially Paid**

Activity

Today

OdooBot 8:37 AM
Not Paid → **Partially Paid** (Payment State)

OdooBot 8:37 AM
Encounter created

Figure 5.6 — An encounter form as the receptionist sees it.

Filling in the encounter

Field	What to do
Patient	Search by name, patient ID or mobile. If this patient already has an open visit today you get a warning (or, if your manager chose <i>Block</i> , you are stopped — add the service to the existing visit instead).
Allergy banner	If the patient has allergies, a red banner appears under their name. Read it out to the clinical staff.
Doctor	Who will see them. May be left empty for a walk-in — any doctor can then pick the patient up.
Department	Defaults to your own department; change it if needed.
Source	Walk-in, Appointment, Referral or Emergency. Choosing <i>Referral</i> reveals Referred By .
Arrival	Defaults to now.
Stage	Which column of the board this visit sits in.
Priority	The stars: Normal, Urgent, Emergency, Critical. Urgent cases stand out on the board.
Services tab	Add what the patient is being charged for — see below.

Then press **Register** (the blue button, top-left). The visit becomes **Open** and appears on the board.

Adding services

On the **Services** tab, click *Add a line* and pick the service. For each line:

Column	Meaning
Service	From your hospital service catalogue.
Description	Copied from the service; you may reword it for the bill.
Performed By	For a consultation this is filled with the encounter's doctor automatically.
Quantity / Unit Price / Discount (%) / Taxes	The price comes from the service, or from the doctor's own consultation fee, or from the patient's pricelist. You may override it.
Complimentary	Tick to make the line free. It stays on the paperwork but is never invoiced.
Status	Ordered → Started → Delivered (or Cancelled). Use the small ►, ✓ and ✕ buttons at the end of the row.

Three things the system will stop you doing, for your protection. 1. You cannot change a service line that is already on a **posted invoice** — ask Billing for a credit note or a supplementary charge. 2. You cannot delete a bed charge by hand; it belongs

to the admission. 3. You cannot type in any money total on the encounter. The totals are calculated, and only Billing may change financial figures.

5.4 Admitting a patient to a bed, cabin or ICU

On the encounter, click **Assign Facility**.

Field in the dialog	What to do
Type	Optional filter: Cabin, Ward Bed, ICU...
Facility	Only facilities that are Available and occupiable are offered.
Start	When the stay begins. Defaults to now.
Expected Days	Used to show an expected end date. It does not lock anything in.
Reserve (patient not arrived yet)	Tick this to hold the bed without starting charges.
Unit Price	The nightly (or hourly, or per-use) charge, pre-filled from the facility. Override for a special rate.

When you confirm, three things happen at once: the occupancy record is created, the bed's status turns to **Occupied**, and a **bed-charge line is added to the encounter automatically**. You never type the bed charge, and you never have to update it — a nightly job increases the number of days for every patient still admitted.

Transfer and **Discharge** are covered in Chapter 6, because a nurse normally does them.

5.5 Appointments

Menu: **Front Desk ► Appointments**. It opens on a calendar.

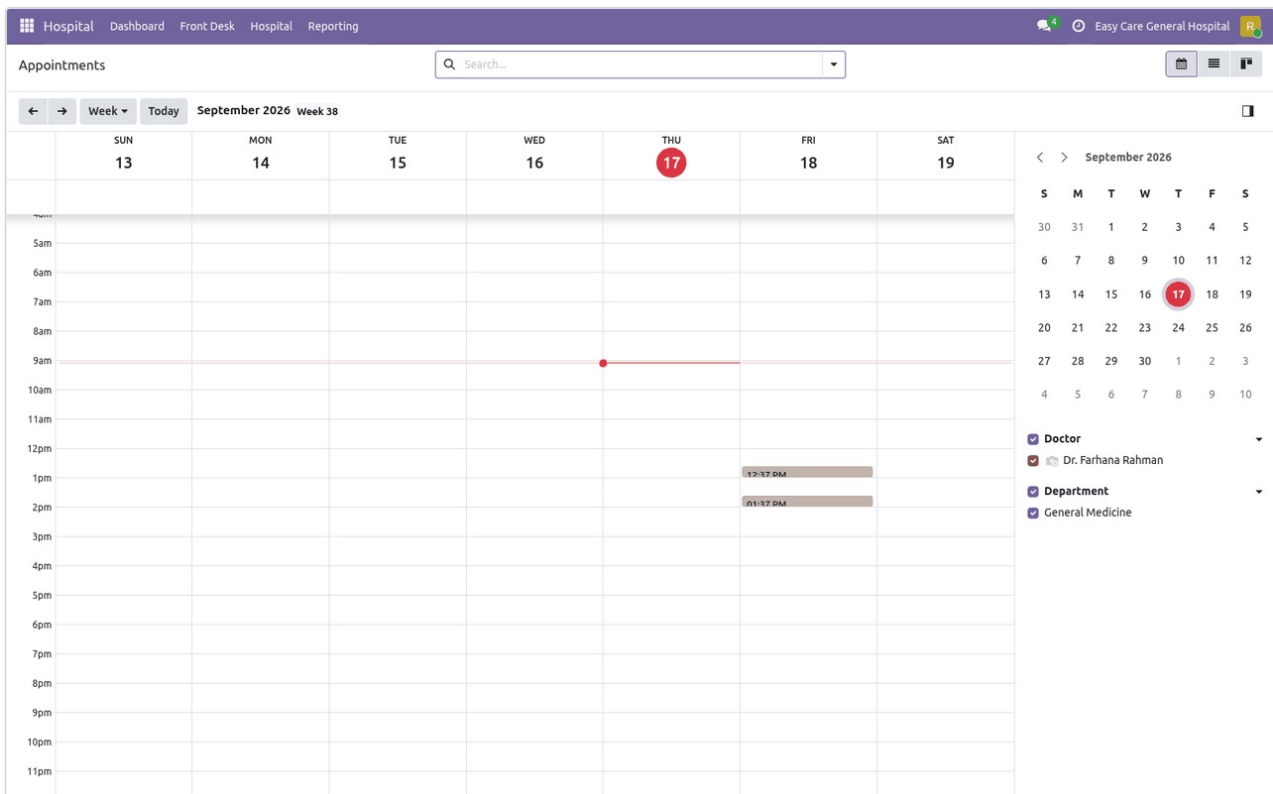


Figure 5.7 — The appointment calendar. Each colour is a doctor.

To book: click an empty slot (or click **New**).

Figure 5.8 — One appointment.

Field	What to do
Patient	Required.
Doctor	Required. Only staff whose hospital role is <i>Doctor</i> .
Department	Filled from the doctor.
Chamber	Optional: which consultation chamber.
Start	Date and time.
Duration (hours)	Pre-filled from the doctor's appointment slot (e.g. 0.25 = 15 min).
End	Calculated.
Reason for Visit / Note	Free text.

Two rules the system enforces when you book

1. **No double-booking.** A doctor cannot have two confirmed appointments in the same slot.
2. **Only inside the doctor's roster.** If the doctor is not rostered at that time, the booking is refused. Ask the Staff Officer to roster them, or ask a Hospital Manager to book it for you.

You also get a *warning* (which you may ignore) when the doctor has already reached their **Max Patients / Day**.

The appointment buttons

Button	What it does
Confirm	Draft → Confirmed. Confirmed appointments get the automatic reminder e-mail.
Check In	The important one. It opens (or finds) today's encounter for that patient, links the appointment to it, adds the doctor's consultation service automatically, and puts you straight on the encounter.
Reschedule	Opens a small dialog to move the appointment; the reason is kept in the history.
Mark as Done	After the visit.
Cancel / No Show	A checked-in or done appointment can no longer be cancelled. Appointments still <i>Confirmed</i> two hours after their end time are marked No Show automatically overnight.
Print Slip	The appointment slip to hand to the patient.

5.6 The Queue

Menu: **Front Desk ► Queue**. This is the answer to "who is still waiting?" — it lists every **Open** visit on which **no service has started yet**. Use it to call the next patient and to spot anyone forgotten. Sort by **Arrival** (click the column heading) to serve people in the order they came in.

Hospital Dashboard Front Desk Hospital Reporting										
Queue										
Q Search... 1-2 / 2										
Priority	Reference	Arrival	Patient	Doctor	Department	Total	Paid	Balance Due	Payment State	State
☐	HMS/ENC/2026/00004	Sep 17, 8:22 AM	Rokeya Begum		General Medicine	\$ 0.00	\$ 0.00	\$ 0.00	No Charge	Open
☐	HMS/ENC/2026/00003	Sep 17, 7:57 AM	Ayaan Chowdhury	Dr. Farhana Rahman	Paediatrics	\$ 0.00	\$ 0.00	\$ 0.00	No Charge	Open
						\$ 0.00	\$ 0.00	\$ 0.00		

Figure 5.9 — The waiting queue.

5.7 Facility Availability

Menu: **Front Desk ► Facility Availability**. A read-only version of the bed board, so you can answer "do you have a cabin free?" without being able to change anything by accident.

Hospital

Dashboard

Front Desk

Hospital

Reporting

Easy Care General Hospital

Facility Availability

Search...

14% occupied

Available

7

Reserved

0

Occupied

1

Cleaning

1

Maintenance

1

Blocked

0

Group by

Building & floor

Room, patient...

Main building · Floor 1

4

0/3 beds

WA-01

Ward A - Bed 1

Ward Bed

Available

\$ 800.00

WA-02

Ward A - Bed 2

Ward Bed

Available

\$ 800.00

WA-03

Ward A - Bed 3

Ward Bed

Cleaning

\$ 800.00

WA

Ward A

General Ward

Main building · Floor 2

2

1/2 beds

C201

Cabin 201

Cabin

Abdul Karim 2.0d

\$ 2,500.00

C202

Cabin 202

Cabin

Maintenance

\$ 2,500.00

Main building · Floor 3

1

0/1 beds

R301

Private Room 301

Private Room

Available

\$ 4,000.00

Main building

3

0/1 beds

CH-1

Chamber 1

Consultation Chamber

ICU-1

ICU Bed 1

ICU Bed

Available

\$ 10,000.00

OT-1

Operation Theatre 1

Operation Theatre

Available

\$ 3,000.00

Figure 5.10 — Which beds are free right now. The coloured strip at the top is both a legend and a filter — click Available to see only free places.

Chapter 6. The Nurse's day

Your menu: Hospital ► Hospital, plus the Dashboard. Your work is the ward: beds, vitals, and marking services as actually done.

6.1 The Facility Board — who is in which bed

Menu: **Hospital ► Facility Board**.

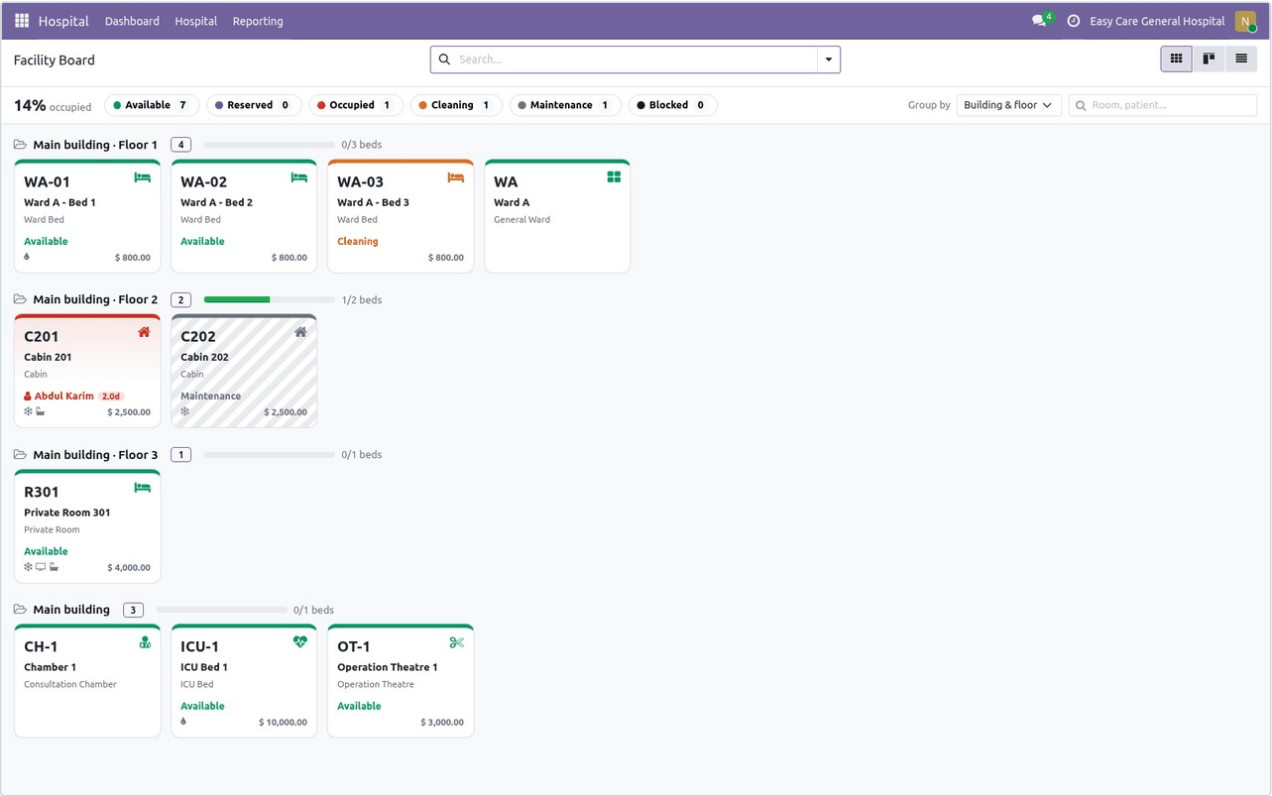


Figure 6.1 — The Facility Board. One tile per bed, cabin, ICU bed, theatre and chamber.

Reading a tile

On the tile	What it tells you
Big text	The facility code (WA-01).
Below it	The full name and the facility type.
Coloured bar / border	The status: green Available, blue Reserved, red Occupied, amber Cleaning, grey Maintenance, black Blocked.
Patient name + 3d badge	Who is in it and for how many days. Click the name to open that admission.
Small icons	Amenities: oxygen, air conditioning, TV, attached bath.
Bottom-right amount	The charge per day (or hour, or use).
2/6 style figure	Used beds out of capacity, for wards.

Working the board

- The coloured strip at the top is a **legend and a filter** at the same time — click *Cleaning* to see only what needs cleaning.
- **Group by** building & floor (the default), department, facility type or ward.
- **Hover over a tile** and its quick buttons appear: **Mark available**, **Send to cleaning**, **Maintenance**. (They are hidden until you hover, and they are not shown at all on a tile you are not allowed to edit, or on an occupied one.)
- The percentage at the top-left is your live **occupancy rate**, and each group has its own small bar reading e.g. 1/2 beds .

The one thing the board will not let you do: free a bed a patient is still in. Discharge or transfer the patient first. When a patient is discharged, the bed moves to **Cleaning** by itself — clean it, then mark it available.

6.2 Admissions (Occupancies)

Menu: **Hospital ► Occupancies (Admit History)**. Every stay, past and present. It opens filtered to stays that are **active now**.

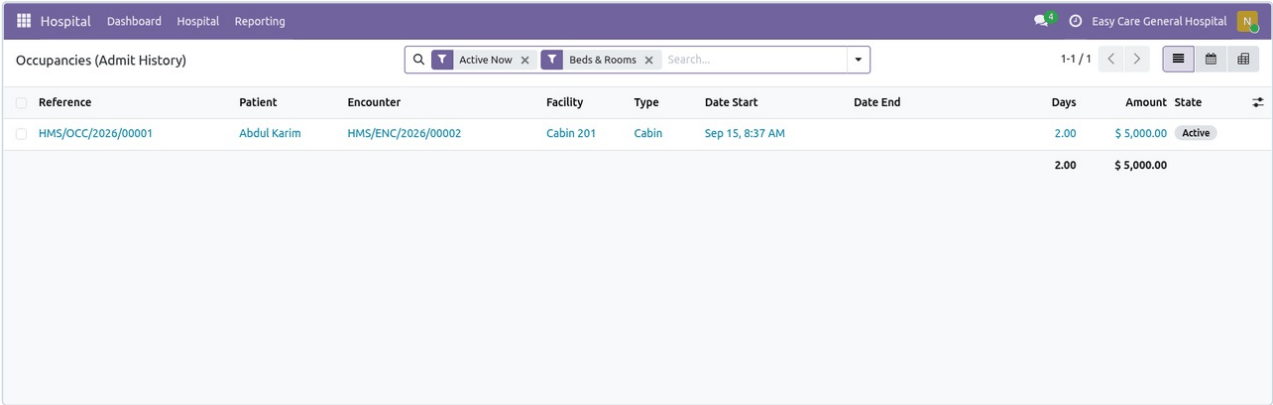


Figure 6.2 — Current admissions.

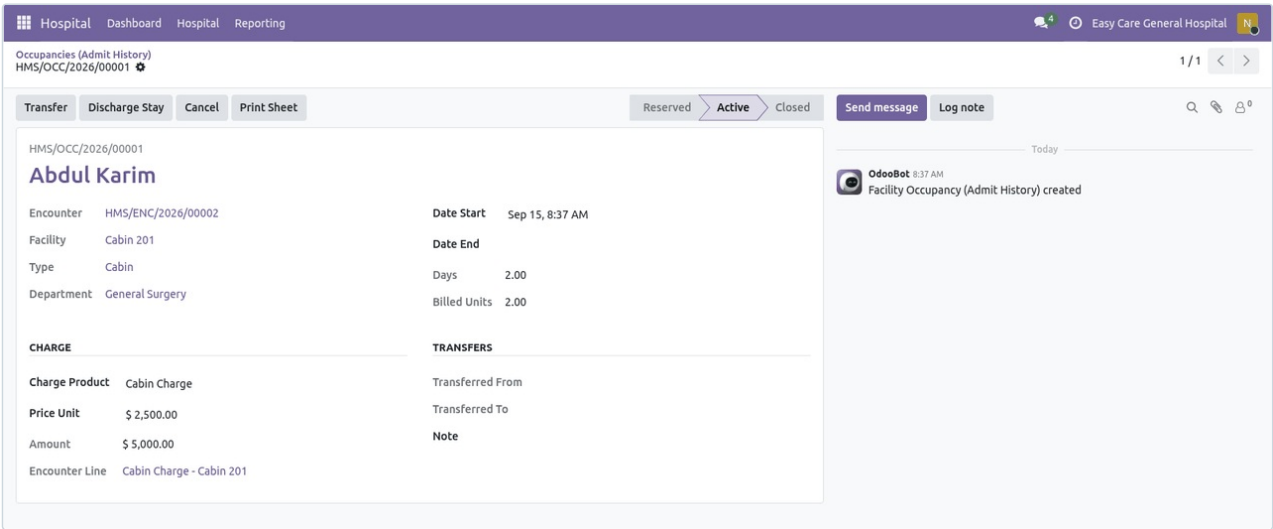


Figure 6.3 — One stay.

Field	Meaning
Reference	Automatic number for the stay.
Encounter / Patient	The visit this stay belongs to.
Facility	Where the patient is.
Start / End	Admission and discharge date and time.
Days / Hours / Billed Units	Calculated. <i>Billed Units</i> is what is actually charged, following the facility's billing unit and your company's bed-day rule.
Charge Service / Unit Price / Amount	What is billed, and how much.
Status	Reserved → Active → Closed, or Cancelled.

Buttons: **Activate** (turn a reservation into a real stay), **Transfer**, **Discharge**, **Cancel**, **Print Sheet**.

Transferring a patient

Click **Transfer** on the stay (or on the encounter).

Field	What to do
From	Read-only: where they are now.
To	The new facility. Only free, occupiable places are offered.
Transfer date	Defaults to now. It cannot be before the stay started.
Reason	Required. It is written into the visit's history.

The old stay is closed at that moment, a new stay opens in the new bed, and both bed charges are adjusted automatically. Only an **Active** stay can be transferred.

Discharging a patient

Click **Discharge** on the encounter.

Field	What to do
Discharge Time	Defaults to now. This time decides the last billable day.
Discharge Type	Recovered, Referred, Discharged Against Medical Advice, Expired, Other.
Discharge Summary	The clinical summary. It is printed on the summary sheet.
Follow-up date	Optional; it is copied onto the visit.
Print summary	Leave ticked to print the discharge summary immediately.

Discharging closes the stay, marks any still-running services as delivered, and moves the visit to **Service Done** — ready for Billing.

6.3 Recording vital signs

Menu: **Hospital ▶ Vital Signs ▶ New** (or the **Clinical** tab of an encounter).

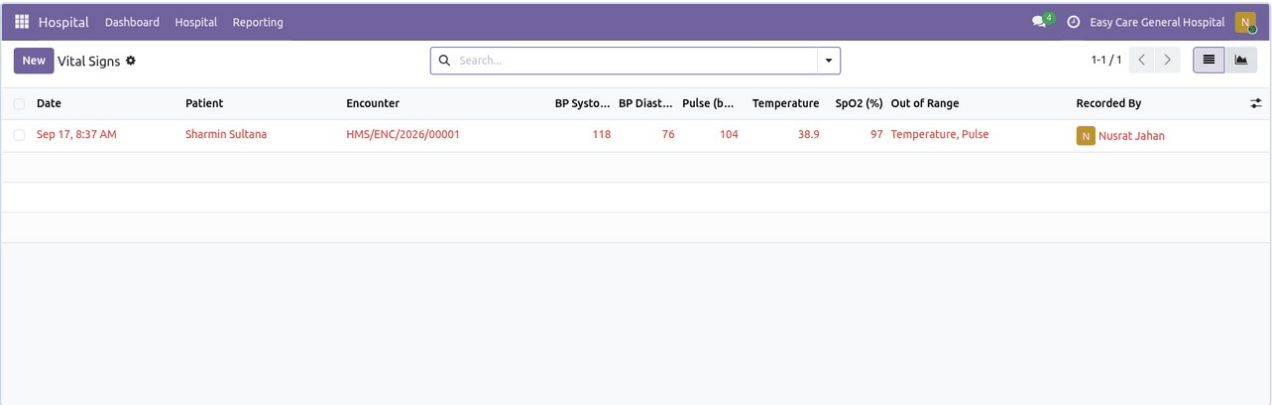


Figure 6.4 — Vital signs. Abnormal readings are flagged.

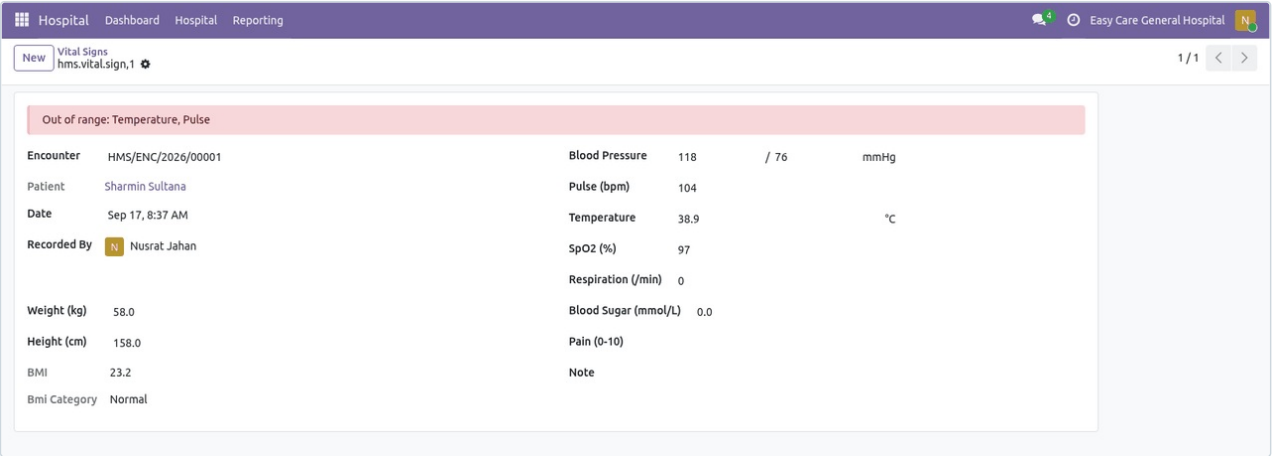


Figure 6.5 — One set of observations.

Field	Notes
Encounter	Which visit these observations belong to. Required.
Date	Defaults to now.
Recorded By	Defaults to you.
Temperature + °C / °F	Record in either unit; the system converts before checking the range.
Pulse (bpm), Respiration (/min), BP Systolic, BP Diastolic, SpO2 (%)	Standard observations.
Weight (kg), Height (cm)	BMI and its category (Underweight / Normal / Overweight / Obese) are calculated for you.
Blood Sugar (mmol/L)	
Pain (0-10)	The patient's own pain score.
Note	Anything else.
Abnormal / Out of Range	Calculated, not typed. Anything outside the ranges your manager set in Settings is flagged, and the <i>Out of Range</i> text names exactly which readings are off.

Do not leave a field at zero to mean "not measured" — leave it empty. A zero is a measurement; an empty box is not, and only empty boxes are ignored by the abnormality check.

6.4 Delivering services

A service line moves **Ordered** → **Started** → **Delivered**. As the nurse you are usually the person who marks the injection, dressing or nursing procedure as delivered, either:

- on the encounter's **Services** tab, with the ► (start) and ✓ (delivered) buttons at the end of each row; or
- from **Hospital ► Consultations**, which opens the service lines of all patients filtered to **Consultations** that are still **Pending**. Remove the *Consultations* filter in the search bar to see procedures and nursing lines too, and tick off a whole round at once.

Hospital Dashboard Hospital Reporting								Easy Care General Hospital	
Consultations								Search...	
☐	Date Service	Encounter	Patient	Service	Service Type	Performed By	Department	Quantity	State
	Sep 29, 5:05 AM	Voluipat blandit	Voluipat blandit	Integer vitae	Consultation	Wendi Baltz	Voluipat blandit	13.51	Draft
	Aug 23, 10:05 PM	In massa	Voluipat blandit	Viverra nam	Nursing	Wendi Baltz	Laoreet id	95.55	Draft
	Sep 16, 6:05 AM	Viverra nam	Viverra nam	Voluipat blandit	Nursing	John Miller	In massa	8.13	Started
	Sep 2, 9:05 PM	Integer vitae	In massa	Viverra nam	Investigation	Henry Campbell	Laoreet id	71.28	Cancelled
	Oct 13, 5:05 PM	Integer vitae	Integer vitae	In massa	Consultation	Thomas Passot	Voluipat blandit	95.50	Ordered
	Oct 9, 5:05 PM	Voluipat blandit	Integer vitae	Voluipat blandit	Operation Theatre	Carrie Helle	In massa	78.61	Draft
	Sep 9, 9:05 AM	In massa	Viverra nam	Voluipat blandit	Other	Henry Campbell	Voluipat blandit	55.68	Cancelled
	Aug 24, 2:05 PM	Laoreet id	Integer vitae	Viverra nam	Bed / Room	Carrie Helle	Integer vitae	50.23	Draft
	Aug 11, 5:05 AM	Laoreet id	Voluipat blandit	Viverra nam	Operation Theatre	Carrie Helle	Viverra nam	2.65	Draft
	Sep 16, 5:05 AM	Integer vitae	Viverra nam	Viverra nam	Operation Theatre	Henry Campbell	Viverra nam	65.68	Started

Figure 6.6 — Pending consultations. The filters at the top switch between consultations, procedures, pending, delivered and "performed by me".

When the last pending line is delivered and no bed is still occupied, the visit moves itself to **Service Done**. That is the signal to Billing.

6.5 The Operation Theatre schedule

Menu: **Hospital ► Operation Theatre Schedule**. The same admission records, filtered to theatres and shown on a calendar, so you can see today's list and spot a clash.

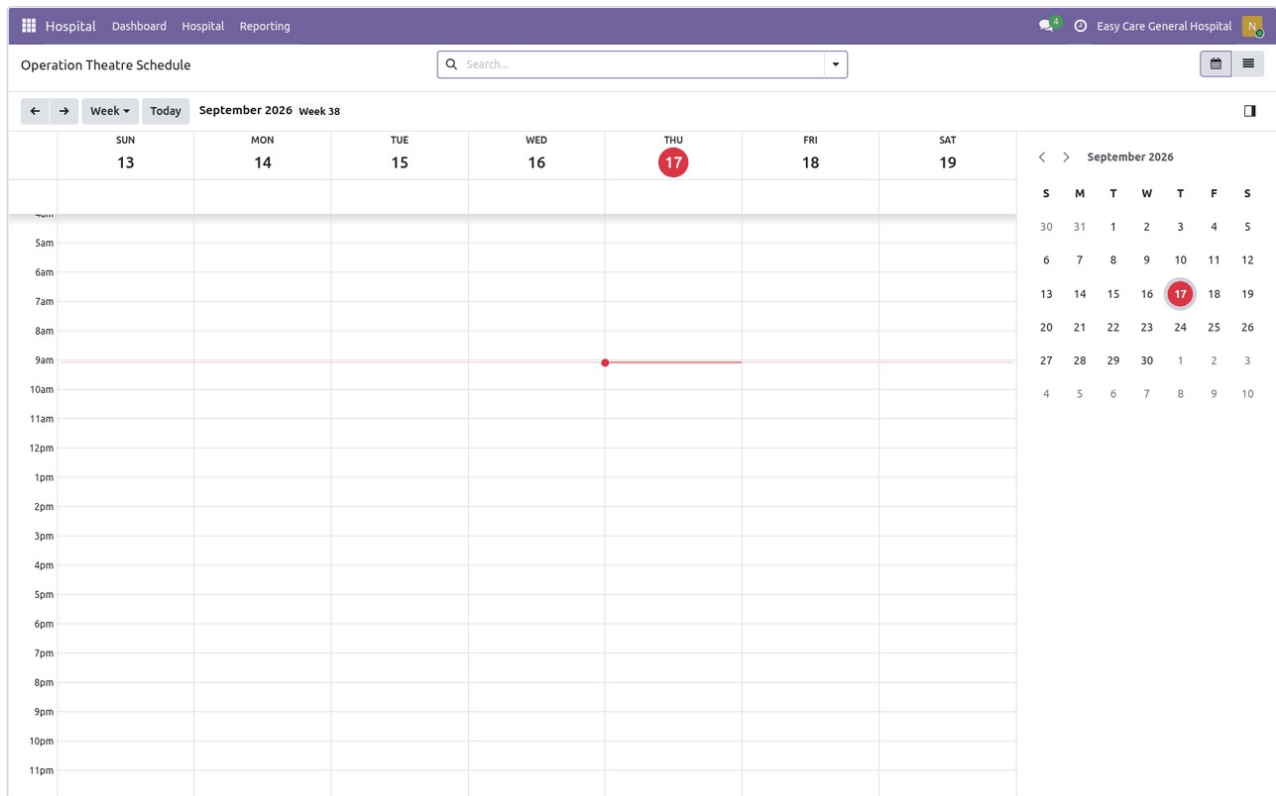


Figure 6.7 — The theatre calendar.

Book a theatre the same way you assign a bed: from the encounter, **Assign Facility**, and pick the theatre. Use **Reserve** for a case that is scheduled but has not started.

Chapter 7. The Doctor's day

Your menu: Hospital ► Hospital, plus the Dashboard. You see **your own** encounters, encounters where you performed a service, and any encounter that has **no doctor yet**.

7.1 My Encounters

Menu: **Hospital ► My Encounters**.

Priority	Reference	Arrival	Patient	Doctor	Department	Total	Paid	Balance Due	Payment State	State
☐	HMS/ENC/2026/00004	Sep 17, 8:22 AM	Rokeya Begum		General Medicine	\$ 0.00	\$ 0.00	\$ 0.00	No Charge	Open
☐	HMS/ENC/2026/00003	Sep 17, 7:57 AM	Ayaan Chowdhury	Dr. Farhana Rahman	Paediatrics	\$ 0.00	\$ 0.00	\$ 0.00	No Charge	Open
☐	HMS/ENC/2026/00001	Sep 17, 5:37 AM	Sharmin Sultana	Dr. Farhana Rahman	General Medicine	\$ 1,092.50	\$ 546.25	\$ 546.25	Partially Paid	Service Done
						\$ 1,092.50	\$ 546.25	\$ 546.25		

Figure 7.1 — The encounters a doctor can see.

Open a patient's visit to work on it.

Service	Description	Performed By	Quantity	Unit Price	Total	State
Doctor Consultati...	Doctor Consultati...	Dr. Farhana Rahman	1.00	\$ 800.00	\$ 920.00	Delivered
Injection / IV Push	Injection / IV Push	Nusrat Jahan	1.00	\$ 150.00	\$ 172.50	Delivered

\$ 1,092.50

Untaxed: \$ 950.00
Taxes: \$ 142.50
Total: \$ 1,092.50
Paid: \$ 546.25
Balance Due: \$ 546.25
Payment State: Partially Paid

Figure 7.2 — An encounter. The red allergy banner is the first thing to read.

On the **Clinical** tab you record:

Area	What to do
Diagnoses	Pick from the diagnosis catalogue. You may add several.
Vital Signs	The observations taken during this visit.
Prescriptions	Every prescription written on this visit.
Notes tab	Free clinical notes.

Your buttons: **Start Service, Prescribe, Service Done, Discharge, Print Summary.**

7.2 Writing a prescription

Click **Prescribe** on the encounter. That is the only place a prescription is *written*: the **Hospital ► Prescriptions** menu is a read-only register of everything already prescribed, for looking things up and reprinting.

Figure 7.3 — A prescription. The right-hand panel is a

live preview of the printed document and redraws itself as you type — what you see there is exactly what will print. The Download button on the preview saves the PDF.

Field	What to do
Encounter	Filled in when you came from the encounter.
Doctor	You, by default.
Date	Now, by default.
Symptoms	What the patient complains of, from the symptom catalogue.
Diagnostic Test	Tests you are advising. They print beside the medicines. Ordering and billing a test stays on the encounter.
Medicines	One line per drug — see the table below.
Advice	Free text: rest, diet, warning signs.
Follow-up date	When to come back. Issuing the prescription copies this onto the visit.

A medicine line

Column	Meaning
Medicine	From your formulary.
Medicine (free text)	Use this <i>instead</i> when the drug is not in the catalogue. Exactly one of the two must be filled — never both.
Dosage	500 mg, 1 tablet, 5 mL.
Frequency	OD (once), BD (twice), TDS (three times), QDS (four times), SOS (when needed), STAT (immediately) or Custom.
Duration + Days / Weeks / Months	How long to take it.
Route	Oral, IV, IM, SC, Topical, Inhalation, Other.
Timing	Before / after / with food.
Quantity	Calculated from frequency × duration (e.g. TDS for 5 days = 15). Override it if you dispense differently.
Instruction	Anything extra for this drug.

Buttons: Issue (Draft → Issued; at least one medicine or some advice is required), **Print**, **Cancel**, **Reset to Draft**.

Hospital

Dashboard

Hospital

Reporting

Easy Care General Hospital

Prescriptions

Search...

1-1 / 1

Reference	Date	Patient	Doctor	Encounter	Symptoms	Medicines	State
☐ HMS/RX/2026/00001	Sep 17, 8:37 AM	Sharmin Sultana	☒ Dr. Farhana Rahman	HMS/ENC/2026/00001	[SYM-001] Fever [SYM-003] Cough	1	Issued

Figure 7.4 — The prescription register.

Your logo

Easy Care General Hospital

24 Hospital Road Dhaka United States
Tel: +880 2 5566 1100 · info@easycarehospital.example

DOCTOR

Dr. Farhana Rahman

MBBS, FCPS (Medicine)
General Medicine

SYMPTOMS

[SYM-001] Fever, [SYM-003] Cough

DIAGNOSTIC TEST

[DT-001] CBC (Complete Blood Count)

Follow-up on:

09/22/2026

PATIENT

Sharmin Sultana (PAT/00002)

32y 0m / Female
HMS/RX/2026/00001 · 09/17/2026 08:37:02 AM

Rx

1. Paracetamol 500 mg 500 mg
TDS · three times a day · After food · 5 Days · Oral · Qty 15

Doctor's signature

Figure 7.5 — What the patient takes home.

Read-only for everyone else. Nurses, the front desk and billing can read prescriptions but cannot write or change them. Only doctors can.

7.3 Finishing the visit

- 1. Make sure every service line on the **Services** tab is **Delivered** (or Cancelled).
- 2. If the patient was admitted, **Discharge** them first.
- 3. Click **Service Done**.

The visit is now Billing's. If your manager switched on *Auto-invoice on Service Done*, the invoice is already waiting at the counter by the time the patient gets there.

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Chapter 8. The Billing Officer's day

Your menu: Hospital ► Account / Billing. You are the only role that may create an invoice or receive money. You can read clinical records but not change them.

Your day has a rhythm: **invoice what is done → take the money → settle what is owed → close the visit → prove the cash at the end of the day.**

8.1 To Invoice — your work list

Menu: **Account / Billing ► To Invoice.** Every visit with chargeable services that are not yet on an invoice.

Priority	Reference	Arrival	Patient	Doctor	Department	Total	Paid	Balance Due	Payment State	State
☆☆☆	HMS/ENC/2026/00002	Sep 15, 8:37 AM	Abdul Karim	Dr. Tanvir Hasan	General Surgery	\$ 7,475.00	\$ 5,000.00	\$ 2,475.00	Partially Paid	In Progress

Figure 8.1 — Visits waiting to be invoiced.

Select one or several rows, or open a visit and click **Create Invoice**.

Field in the invoicing dialog	What to do
Encounters	What you selected.
Encounters to invoice / Amount to invoice	A read-only summary — check it before confirming.
Journal	Your hospital sales journal; pre-filled from Settings.
Invoice Date	Defaults to today.
Post immediately	Leave ticked so the invoice is final and payable at once. Untick to leave it in draft for review.

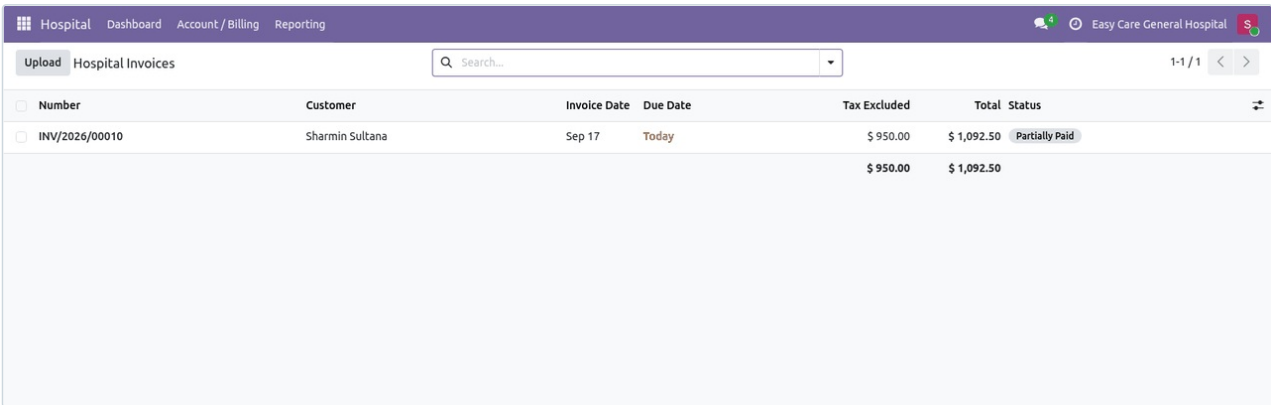
One invoice per visit. The module never merges two visits onto one invoice, because that is the only way the *paid* and *due* figures on each visit can stay exactly right. A visit can, however, have more than one invoice if new services are added after the first one was issued.

Figure 8.1b — The same visit opened by Billing. The extra

Billing tab and the Create Invoice, Deposit, Receive Payment and Close buttons appear only for your role.

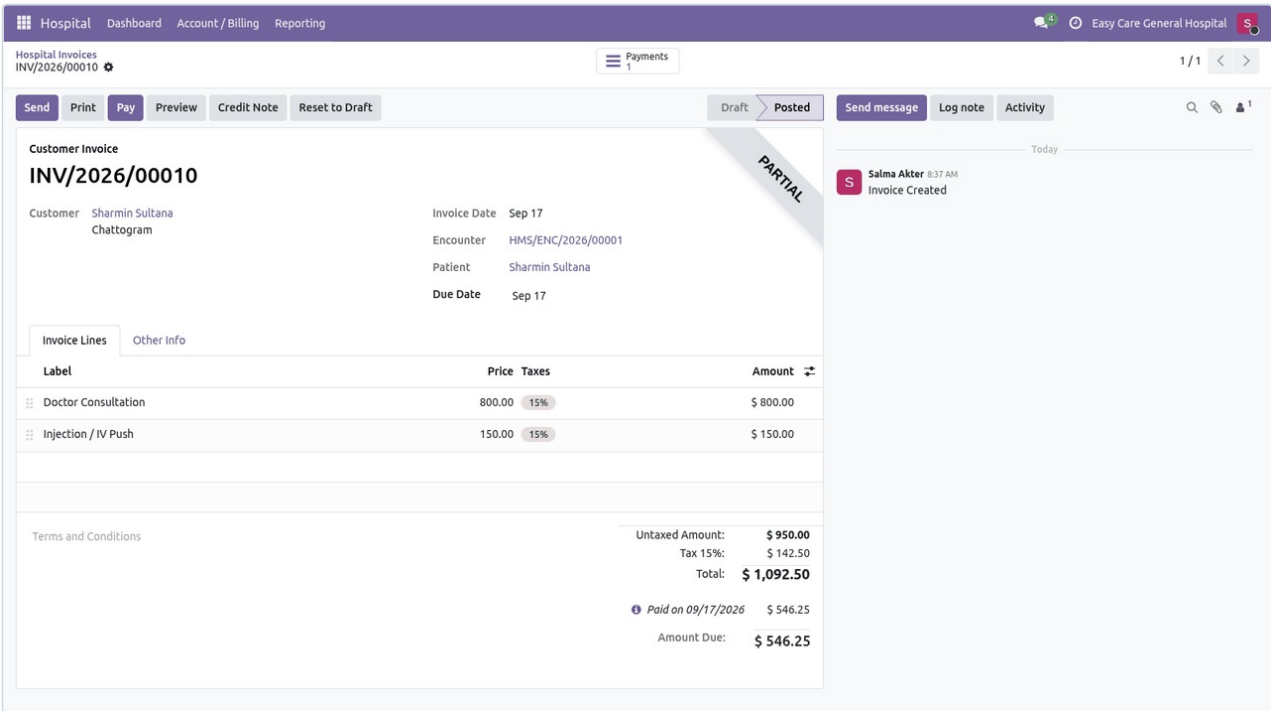
8.2 Invoices

Menu: **Account / Billing ► Invoices**. The standard Odoo customer invoice, filtered to hospital invoices.



Number	Customer	Invoice Date	Due Date	Tax Excluded	Total	Status
INV/2026/00010	Sharmin Sultana	Sep 17	Today	\$ 950.00	\$ 1,092.50	Partially Paid

Figure 8.2 — Hospital invoices.



Customer Invoice
INV/2026/00010

Customer: Sharmin Sultana
Chattogram

Invoice Date: Sep 17
Encounter: HMS/ENC/2026/00001
Patient: Sharmin Sultana
Due Date: Sep 17

Invoice Lines

Label	Price	Taxes	Amount
Doctor Consultation	800.00	15%	\$ 800.00
Injection / IV Push	150.00	15%	\$ 150.00

Terms and Conditions

Untaxed Amount: \$ 950.00
Tax 15%: \$ 142.50
Total: **\$ 1,092.50**

Paid on 09/17/2026 \$ 546.25
Amount Due: **\$ 546.25**

Figure 8.3 — One invoice, showing which visit it belongs to.

The important extra fields this module adds are **Patient** and **Encounter**, so every invoice can be traced back to the visit that produced it.

To take money on a single invoice, use Odoo's own **Pay** button. To take money for a patient across several invoices, use the settlement wizard (8.4) — it is usually what you want at a hospital counter.

8.3 Payments and deposits

Menu: **Account / Billing ► Payments** lists every payment received at the hospital counter.

Hospital Dashboard Account / Billing Reporting						
Payments Search...						
1-2 / 2						
☐ Date	Number	Journal	Payment Method	Customer	Amount	State
☐ Sep 17	PBNK1/2026/00002	Bank	Manual Payment	Abdul Karim	\$ 5,000.00	In Process
☐ Sep 17	PBNK1/2026/00001	Bank	Manual Payment	Sharmin Sultana	\$ 546.25	In Process
					\$ 5,546.25	

Figure 8.4 — Payments received.

Hospital Dashboard Account / Billing Reporting									
Payments PBNK1/2026/00002									
1 / 1									
Reset to Draft Mark as Sent Draft In Process Paid Send message Log note Activity									
PBNK1/2026/00002									
Payment Type ☐ Send ☒ Receive		Journal Bank							
Customer Abdul Karim		Payment Method ? Manual Payment							
Amount \$ 5,000.00		Company Bank Account BANK134567890 (trusted)							
Date Sep 17									
Memo Advance deposit HMS/ENC/2026/00002									
Encounter HMS/ENC/2026/00002									
Cashier Salma Akter									
Cashier Shift									
Today Salma Akter 8:37 AM Payments created									

Figure 8.5 — A payment.

Cashier records who took the money.

Deposits and advances (menu: **Account / Billing ► Deposits & Advances**) are money taken *before* there is anything to invoice — a surgery advance, for example. Register one from the visit with the **Deposit** button.

Hospital Dashboard Account / Billing Reporting						
New Deposits & Advances Search...						
1-1 / 1						
☐ Date	Number	Journal	Payment Method	Customer	Amount	State
☐ Sep 17	PBNK1/2026/00002	Bank	Manual Payment	Abdul Karim	\$ 5,000.00	In Process
					\$ 5,000.00	

Figure 8.6 — Open deposits: money held against a visit that is not yet used up.

A deposit is automatically applied to that visit's invoice the moment the invoice is posted, so nothing is counted twice and nothing is forgotten.

8.4 Settling a patient's outstanding balance

This is the counter workflow for "the patient is here and wants to pay".

Open the patient (or the visit) and click **Settle Outstanding / Receive Payment**.

Field	What to do
Encounters with Balance / Total Outstanding	Everything this patient still owes, across all their visits.
Invoice uninvoiced services first	Leave ticked. Services that are delivered but not yet invoiced are invoiced and posted first, so the whole balance can be cleared in one go.
Amount Received	Pre-filled with the full outstanding amount. Type what the patient actually hands over.
Payment Date	Defaults to today.
Journal and Payment Method	Cash drawer, bank, card terminal.
Allocation	<i>Oldest first</i> pays the oldest invoice first, then the next. <i>Manual</i> lets you type how much goes to each invoice.
Memo	Reference for the receipt.

Two refusals you will meet, and what they mean:

- *"The amount received exceeds the open invoices."* — the patient is paying more than they owe. Take the excess as a **deposit** on a visit instead.
- *"... has no open invoice to settle."* — nothing has been invoiced yet. Tick *Invoice uninvoiced services first*, or invoice the visit first.

8.5 The patient ledger and outstanding list

Account / Billing ► Patient Ledger — patients who owe money, with the total per patient. Start here when chasing a balance.

Patient Ledger							1-2 / 2
☐	Patient ID	Name	Gender	Age	Mobile	Last Visit Date	Outstanding
☐	PAT/00002	Sharmin Sultana	Female	32y 0m	01711000002	Sep 17, 5:37 AM	\$ 546.25
☐	PAT/00001	Abdul Karim	Male	58y 3m	01711000001	Sep 15, 8:37 AM	\$ 2,475.00
							\$ 3,021.25

Figure 8.7 — Who owes what.

Account / Billing ► Outstanding Encounters — the same money seen per visit instead of per patient.

Outstanding Encounters											1-2 / 2
☐	Priority	Reference	Arrival	Patient	Doctor	Department	Total	Paid	Balance Due	Payment State	State
☐	☆☆☆	HMS/ENC/2026/00001	Sep 17, 5:37 AM	Sharmin Sultana	Dr. Farhana Rahman	General Medicine	\$ 1,092.50	\$ 546.25	\$ 546.25	Partially Paid	Service Done
☐	☆☆☆	HMS/ENC/2026/00002	Sep 15, 8:37 AM	Abdul Karim	Dr. Tanvir Hasan	General Surgery	\$ 7,475.00	\$ 5,000.00	\$ 2,475.00	Partially Paid	In Progress
							\$ 8,567.50	\$ 5,546.25	\$ 3,021.25		

Figure 8.8 — Visits with a balance due.

8.6 Refunds and credit notes

Menu: **Account / Billing ► Refunds / Credit Notes**. Create a credit note the standard Odoo way, from the invoice you are correcting. The credited amount is subtracted from the visit's total automatically.

Hospital Dashboard Account / Billing Reporting						
Upload Refunds / Credit Notes		Search...				
☐	Number	Customer	Invoice Date	Due Date	Tax Excluded	Total Status
	REF0001		Aug 21		\$ 22,383.00	\$ 26,284.00
	REF0002		Sep 14		\$ 73,432.00	\$ 88,700.00
	REF0003		Sep 2	In 22 days	\$ 88,069.00	\$ 10,242.00
	REF0004		Nov 4		\$ 71,000.00	\$ 55,362.00 PAID
	REF0005		Oct 19		\$ 43,481.00	\$ 14,637.00 Not Paid
	REF0006		Sep 13		\$ 68,837.00	\$ 42,846.00 Sent
	REF0007		Nov 1		\$ 25,241.00	\$ 5,915.00 Posted
	REF0008		Oct 13		\$ 78,990.00	\$ 73,796.00 PAID
	REF0009		Oct 19		\$ 41,623.00	\$ 77,844.00 Sent
	REF0010		Sep 22		\$ 75,437.00	\$ 10,816.00 Posted
					\$ 591,539.00	\$ 406,584.00
 Create new document						

Figure 8.9 — Credit notes.

Never edit a posted invoice line, and never change a service that is already invoiced. The system blocks both. Issue a credit note, or add a supplementary charge. That is what an auditor expects to see.

8.7 Closing the visit

Once the patient is finished and the money situation is settled, open the visit and click **Close**.

Field in the closing dialog	What to do
Total / Paid / Balance Due	Read-only. Check them out loud with the patient.
Closing date	Defaults to now.
Closing Note	Why, if anything is unusual.
Invoice remaining services first	Ticked automatically when something is still uninvoiced. Leave it ticked.
Force Close	Only a Hospital Manager sees this. It is needed when the balance due is over the company threshold.

What the system checks before it lets the visit close:

1. No service still *Ordered* or *Started*.
2. No bed, cabin or theatre still occupied.
3. If a balance is due: your company must allow closing with outstanding, and if the balance is over the threshold, only a manager can close it, and only by ticking *Force Close*.

8.8 Proving the day's cash

Menu: **Account / Billing ► Daily Collection** (also under Reporting).

Hospital Dashboard Account / Billing Reporting			
Easy Care General Hospital			

Daily Collection

Date From

Sep 17

Date To

Sep 17

Group By

☒ Cashier
 ☐ Payment Method
 ☐ Day

Cashiers

All cashiers

Journals

All journals

Print PDF

Cancel

Figure 8.10 — The daily collection report.

Field	What to do
Date from / Date to	Both default to today.
Cashiers	Leave empty for everybody, or pick yourself for your own drawer.
Journals	Cash, bank or card — leave empty for all.
Group by	Cashier, Payment Method or Day.

Print produces the PDF you hand in with the cash.

Chapter 9. The Staff Officer's day

Your menu: Hospital ► Staff. You look after people: who works here, who is on duty, and who actually turned up.

9.1 Staff records

Staff ► Staff and **Staff ► Doctors** are described in full in Chapter 3, Step 9 — every field and who may see it. Day to day you will:

- add a new joiner (remember **Related User** and **Hospital Staff**);
- keep **Licence Expiry** current — thirty days before expiry the system creates a to-do for you automatically, so you are never surprised;
- archive a leaver instead of deleting them, so their history survives.

9.2 Shifts and the roster

Staff ► Shifts defines the shifts once (Chapter 3, Step 9c). **Staff ► Roster** is the weekly work.

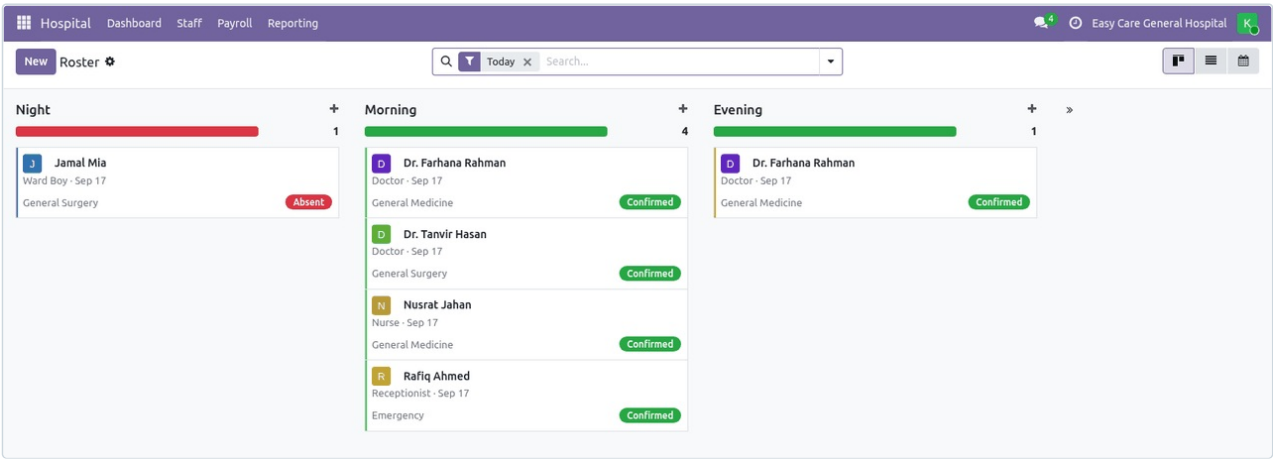


Figure 9.1 — The roster board. Drag a card to another day or shift to move a person.

Practical advice:

- Build **next week's roster before this week ends**. Appointments cannot be booked outside a doctor's roster, so an empty roster quietly blocks the front desk.
- Mark **Absent** rather than deleting a line. Payroll counts absences from the roster; a deleted line is invisible.
- Move a roster line through **Planned → Confirmed → Done**. Confirmed is what appointment booking looks at.

9.3 Attendance

Staff ► Attendance shows today's check-ins for hospital staff.

Hospital Dashboard Staff Payroll Reporting										
Easy Care General Hospital										
New Attendance										
Search...										
1-80 / 111										
Employee	Check In	Check Out	Worked Hours	Roster Line	Is L...	Late Minutes	Roster Overtime	Worked Extra Hours	Extra Hours	
Nusrat Jahan	Sep 17, 8:05 AM		00:00	Nusrat Jahan - Morning - 2026-09-17		0.00	00:00	00:00	00:00	
Dr. Farhana Rahman	Sep 17, 8:05 AM		00:00	Dr. Farhana Rahman - Morning - 2026-09-17		0.00	00:00	00:00	00:00	
Nusrat Jahan	Sep 16, 8:00 AM	Sep 16, 4:00 PM	07:00	Nusrat Jahan - Morning - 2026-09-16		0.00	00:00	08:00	08:00	
Rafiq Ahmed	Sep 16, 8:00 AM	Sep 16, 4:30 PM	07:30	Rafiq Ahmed - Morning - 2026-09-16		0.00	00:30	08:30	08:30	
Dr. Farhana Rahman	Sep 16, 8:00 AM	Sep 16, 5:00 PM	08:00	Dr. Farhana Rahman - Morning - 2026-09-16		0.00	01:00	09:00	09:00	
Dr. Farhana Rahman	Sep 15, 8:00 AM	Sep 15, 5:00 PM	08:00	Dr. Farhana Rahman - Morning - 2026-09-15		0.00	01:00	09:00	09:00	
Nusrat Jahan	Sep 15, 8:00 AM	Sep 15, 4:00 PM	07:00	Nusrat Jahan - Morning - 2026-09-15		0.00	00:00	08:00	08:00	
Rafiq Ahmed	Sep 15, 8:00 AM	Sep 15, 4:30 PM	07:30	Rafiq Ahmed - Morning - 2026-09-15		0.00	00:30	08:30	08:30	
Nusrat Jahan	Sep 14, 8:25 AM	Sep 14, 4:00 PM	06:35	Nusrat Jahan - Morning - 2026-09-14		25.00	00:00	07:35	07:35	
Dr. Farhana Rahman	Sep 14, 8:00 AM	Sep 14, 5:00 PM	08:00	Dr. Farhana Rahman - Morning - 2026-09-14		0.00	01:00	09:00	09:00	
Rafiq Ahmed	Sep 14, 8:00 AM	Sep 14, 4:30 PM	07:30	Rafiq Ahmed - Morning - 2026-09-14		0.00	00:30	08:30	08:30	
Dr. Farhana Rahman	Sep 13, 8:00 AM	Sep 13, 5:00 PM	09:00	Dr. Farhana Rahman - Morning - 2026-09-13		0.00	01:00	09:00	09:00	
Nusrat Jahan	Sep 13, 8:00 AM	Sep 13, 4:00 PM	08:00	Nusrat Jahan - Morning - 2026-09-13		0.00	00:00	08:00	08:00	
Rafiq Ahmed	Sep 13, 8:00 AM	Sep 13, 4:30 PM	08:30	Rafiq Ahmed - Morning - 2026-09-13		0.00	00:30	08:30	08:30	
Dr. Farhana Rahman	Sep 12, 8:00 AM	Sep 12, 5:00 PM	09:00	Dr. Farhana Rahman - Morning - 2026-09-12		0.00	01:00	09:00	09:00	
Nusrat Jahan	Sep 12, 8:00 AM	Sep 12, 4:00 PM	08:00	Nusrat Jahan - Morning - 2026-09-12		0.00	00:00	08:00	08:00	
Rafiq Ahmed	Sep 12, 8:00 AM	Sep 12, 4:30 PM	08:30	Rafiq Ahmed - Morning - 2026-09-12		0.00	00:30	08:30	08:30	
Nusrat Jahan	Sep 11, 8:25 AM	Sep 11, 4:00 PM	06:35	Nusrat Jahan - Morning - 2026-09-11		25.00	00:00	07:35	07:35	
Rafiq Ahmed	Sep 11, 8:00 AM	Sep 11, 4:30 PM	07:30	Rafiq Ahmed - Morning - 2026-09-11		0.00	00:30	08:30	08:30	
Dr. Farhana Rahman	Sep 11, 8:00 AM	Sep 11, 5:00 PM	08:00	Dr. Farhana Rahman - Morning - 2026-09-11		0.00	01:00	09:00	09:00	
Nusrat Jahan	Sep 10, 8:00 AM	Sep 10, 4:00 PM	07:00	Nusrat Jahan - Morning - 2026-09-10		0.00	00:00	08:00	08:00	

Figure 9.2 — Today's attendance.

The module adds four figures to every attendance record, all **calculated from the roster**, none of them typed:

Column	What it means
Roster Line	Which rostered shift this check-in was matched to. A check-in up to four hours before the shift still matches it.
Late (minutes) and Late flag	How many minutes after the shift start they checked in, counted only beyond the shift's grace period.
Early Leave (minutes)	How early they checked out.
Roster Overtime	Hours worked beyond the planned shift (planned = shift duration minus the break).

If somebody forgot to check in or out, correct the check-in / check-out times here. Everything else recalculates itself.

Staff ► Attendance Summary is the same data as a pivot table, pre-set to worked hours, late minutes and overtime per person.

Hospital Dashboard Staff Payroll Reporting										
Easy Care General Hospital										
Attendance Summary										
Search...										
Measures										
Total										
August 2026										
September 2026										
	Worked Hours	Late Minutes	Roster Overtime	Worked Hours	Late Minutes	Roster Overtime	Worked Hours	Late Minutes	Roster Overtime	
Total	630:15	0.00	47.25	229:45	75.00	15.00	860:00	75.00	62.25	
Dr. Farhana Rahman	232:45	0.00	33.75	82:00	0.00	10.00	314:45	0.00	43.75	
Nusrat Jahan	185:00	0.00	0.00	70:45	75.00	0.00	255:45	75.00	0.00	
Rafiq Ahmed	212:30	0.00	13.50	77:00	0.00	5.00	289:30	0.00	18.50	

Figure 9.3 — Attendance summary. Drag fields into rows and columns to re-slice it; use the download icon for Excel.

Chapter 10. The Payroll Officer's day

Your menu: Hospital ► Payroll. The payroll in this module is self-contained: contracts, rules, structures, payslips and batches all live here.

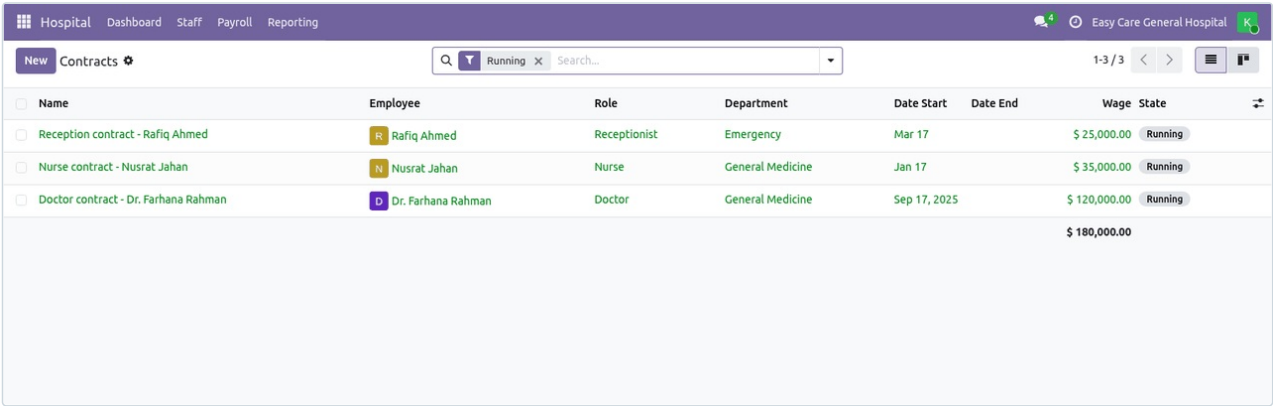
What feeds a payslip, automatically:

Input	Where it comes from
Worked days	Days with a completed attendance in the period.
Absent days	Rostered days marked Absent, or rostered days with no attendance at all.
Overtime hours	The roster-based overtime on those attendances.
Late minutes	The roster-based lateness.
Commission	Services delivered in the period where the person is the performer x their Commission (%).

So: no roster and no attendance means no overtime, no absence and no lateness.

10.1 Monthly run, step by step

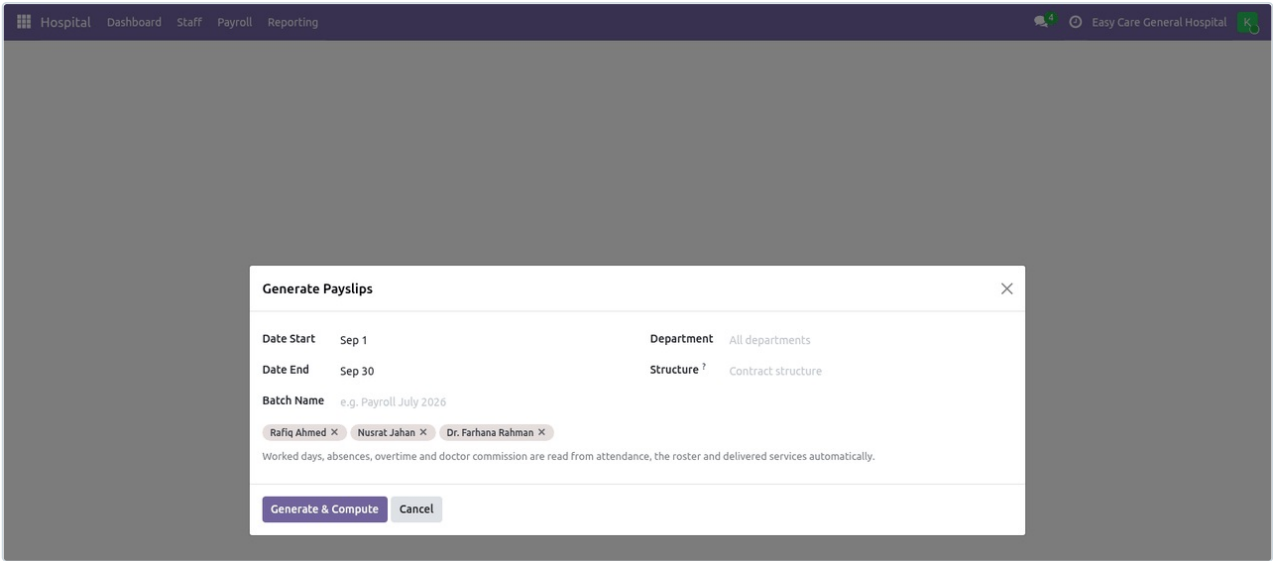
Step 1 — Check the contracts. Menu **Payroll ► Contracts**. Everyone to be paid needs status **Running** covering the period (Chapter 3, Step 11b).



Name	Employee	Role	Department	Date Start	Date End	Wage	State
Reception contract - Rafiq Ahmed	Rafiq Ahmed	Receptionist	Emergency	Mar 17		\$ 25,000.00	Running
Nurse contract - Nusrat Jahan	Nusrat Jahan	Nurse	General Medicine	Jan 17		\$ 35,000.00	Running
Doctor contract - Dr. Farhana Rahman	Dr. Farhana Rahman	Doctor	General Medicine	Sep 17, 2025		\$ 120,000.00	Running
						\$ 180,000.00	

Figure 10.1 — Contracts, filtered to running ones.

Step 2 — Generate the payslips. Menu **Payroll ► Generate Payslips**.



Generate Payslips

Date Start

Sep 1

Department

All departments

Date End

Sep 30

Structure ?

Contract structure

Batch Name

e.g. Payroll July 2026

Rafiq Ahmed X

Nusrat Jahan X

Dr. Farhana Rahman X

Worked days, absences, overtime and doctor commission are read from attendance, the roster and delivered services automatically.

Generate & Compute

Cancel

Figure 10.2 — Generating a month's payslips.

Field	What to do
Date start / Date end	The payroll period; defaults to this month.
Department	Leave empty for the whole hospital, or run one department at a time.
Salary Structure	Leave empty to use each contract's own structure.
Staff	Filled automatically with everyone who has a running contract in the period. Remove anybody you do not want.
Batch Name	What the batch will be called, e.g. Payroll August 2026 .

Confirm, and the system creates one payslip per person, computes every one of them, and drops you on the batch.

Step 3 — Check the batch. Menu **Payroll** ► **Payslip Batches**.

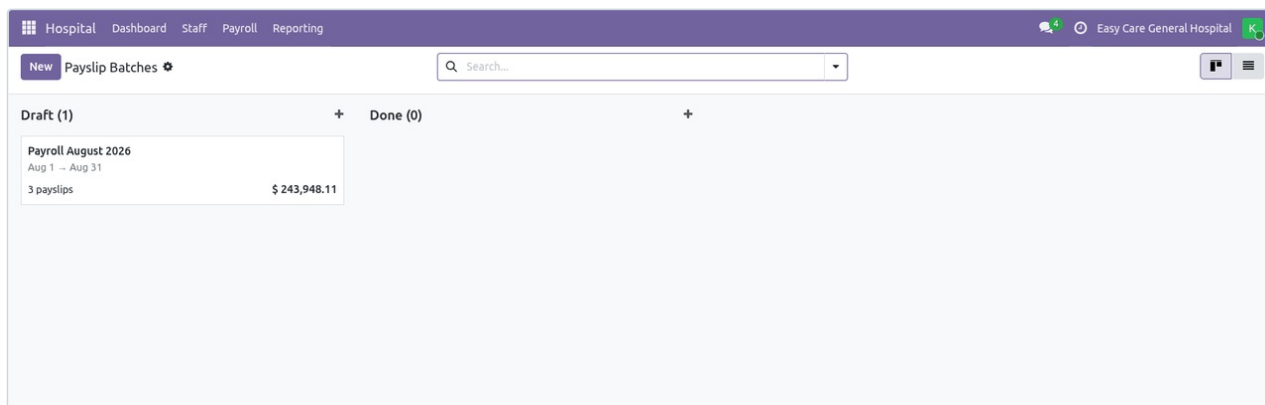


Figure 10.3 — Batches.

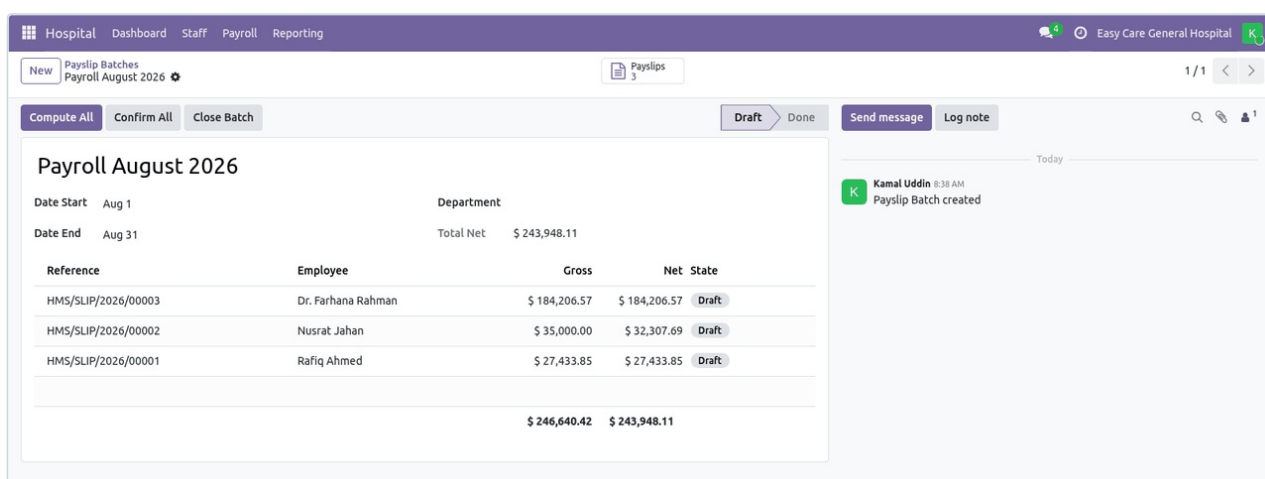


Figure 10.4 — A batch, with every payslip and the totals.

Batch buttons: **Compute All** (recalculate everything after a correction), **Confirm All**, **Close**, **Back to Draft**.

Step 4 — Check a payslip. Menu **Payroll** ► **Payslips**.

Reference	Employee	Role	Department	Date From	Date To	Gross	Total Deduction	Net	State
☐ HMS/SLIP/2026/00003	Dr. Farhana Rahman	Doctor	General Medicine	Aug 1	Aug 31	\$ 184,206.57	\$ 0.00	\$ 184,206.57	Draft
☐ HMS/SLIP/2026/00002	Nusrat Jahan	Nurse	General Medicine	Aug 1	Aug 31	\$ 35,000.00	\$ 2,692.31	\$ 32,307.69	Draft
☐ HMS/SLIP/2026/00001	Rafiq Ahmed	Receptionist	Emergency	Aug 1	Aug 31	\$ 27,433.85	\$ 0.00	\$ 27,433.85	Draft
						\$ 246,640.42	\$ 2,692.31	\$ 243,948.11	

Figure 10.5 — Payslips.

Hospital
Dashboard
Staff
Payroll
Reporting
Easy Care General Hospital

New
Payslips
HMS/SLIP/2026/00003
1 / 1

Compute Sheet
Verify
Confirm
Print
Cancel
Draft
Verified
Done
Paid
Send message
Log note
Activity

HMS/SLIP/2026/00003

D
Dr. Farhana Rahman

Period
Aug 1
- Aug 31
Contract
Doctor contract - Dr. Farhana Rahman
Structure
Hospital Staff Structure
Batch
Payroll August 2026

Worked Days
27.00
Absent Days
0.00
Overtime Hours
33:45
Late Minutes
0.00
Commission Amount
\$ 0.00

Computation
Notes

Code	Name	Category	Quantity	Rate	Total
BASIC	Basic Salary	Basic	1.00	100.00	\$ 120,000.00
ALW	Allowances	Allowance	1.00	100.00	\$ 35,000.00
OT	Overtime	Allowance	1.00	100.00	\$ 29,206.57
GROSS	Gross Salary	Gross	1.00	100.00	\$ 184,206.57
NET	Net Salary	Net	1.00	100.00	\$ 184,206.57

Gross: \$ 184,206.57
Total Deduction: \$ 0.00
Net: \$ 184,206.57

Kamal Uddin 8:38 AM
Payslip created

Figure 10.6 — A payslip, its inputs and its computed lines.

Area	What it shows
Employee / Contract / Structure	Who is paid, under which contract and rule set. The contract is found automatically from the period.
Period	From and to.
Worked days, Absent days, Overtime hours, Late minutes, Commission	The automatic inputs, all read-only.
Computation lines	One line per salary rule that applied, with quantity, rate and amount.
Gross / Deductions / Net	Totals, calculated from the lines.
Journal Entry	Filled only if your company posts payslip entries.

Payslip buttons: **Compute Sheet** (recalculate), **Verify**, **Confirm**, **Mark Paid**, **Cancel**, **Reset to Draft**, **Print**.

The states run **Draft** → **Verified** → **Done** → **Paid**, with **Cancelled** to one side. A *Done* or *Paid* payslip cannot be deleted, only cancelled — and cancelling one that has a posted journal entry reverses that entry for you.

Your logo
Easy Care General Hospital
24 Hospital Road Dhaka United States
Tel: +880 2 5566 1100 - info@easycarehospital.example

PAYSリップ
Reference
HMS/SLIP/2026/00003
Period
08/01/2026 - 08/31/2026
Employee
Dr. Farhana Rahman
Role
Doctor
Department
General Medicine
Contract
Doctor contract - Dr. Farhana Rahman
Worked Days
27.0
Absent Days
0.0
Overtime (h)
33.8
Status
Draft

Code	Description	Quantity / Base	Rate %	Amount
BASIC	Basic Salary	1.00	100.00	\$ 120,000.00
ALW	Allowances	1.00	100.00	\$ 35,000.00
OT	Overtime	1.00	100.00	\$ 29,206.57
GROSS	Gross Salary	1.00	100.00	\$ 184,206.57
NET	Net Salary	1.00	100.00	\$ 184,206.57

Gross
\$ 184,206.57
Deductions
\$ 0.00
Net Pay
\$ 184,206.57

Employee
Authorised

Figure 10.7 — The printed payslip.

Privacy. Every employee can read **their own** payslips and nobody else's. Payroll Officers and Hospital Managers see them all. This is enforced by the database, not by hiding a menu.

Chapter 11. The Dashboard and the reports (everybody)

11.1 The Hospital Dashboard

Menu: **Hospital ► Dashboard**. It opens on the tabs your role is allowed to see — a receptionist does not get a Payroll tab.

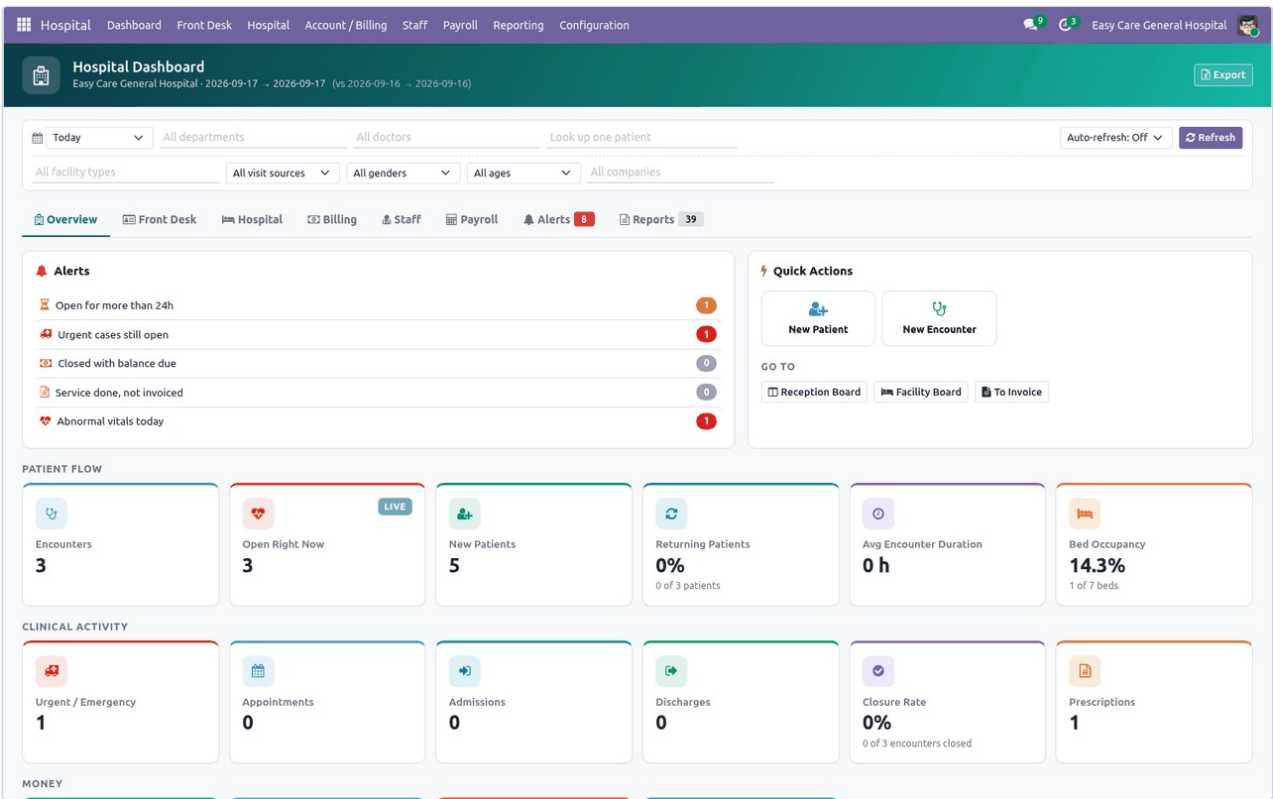


Figure 11.1 — Overview.

How to work it

- The **filter bar** at the top applies to every figure below it: period (with ready-made choices such as last 7 / 30 / 90 days and fiscal years), department, doctor, patient, facility type, visit source, gender, age band and company.
- **KPI cards** are clickable. Clicking one opens the underlying list, already filtered — that is the fastest way to go from a number to the records behind it.
- **Charts** below the cards break the same numbers down.
- **Quick Actions** are shortcuts to the screens your role uses most.
- **Auto-refresh** (top-right of the filter bar) can be left off or set to refresh every few minutes; **Refresh** beside it reloads on demand.
- The green header line tells you the period being shown and, in brackets, the earlier period the trends are compared against.
- **Export** (top-right) downloads the whole dashboard.

The **Overview** tab also carries an **Alerts** card (open for more than 24 h, urgent cases still open, closed with balance due, service done but not invoiced, abnormal vitals today) and a **Quick Actions** card with *New Patient*, *New Encounter* and shortcuts to the Reception Board, the Facility Board and To Invoice.

The tabs

Tab	Who sees it	What it answers
Overview	Front desk, nurse, doctor, billing	How is the hospital doing today?
Front Desk	Receptionist	Registrations, appointments, queue and waiting times.
Hospital	Front desk, nurse, doctor	Beds, occupancy, admissions, theatre use.
Billing	Billing Officer	Invoiced, collected, outstanding, collections by method.
Staff	Staff Officer	Who is on duty, attendance, lateness, licence expiries.
Payroll	Payroll Officer	Cost, gross, net, per department.
Alerts	everybody	Everything that needs attention, with a red count badge.
Reports	everybody	The report centre — see 11.3.

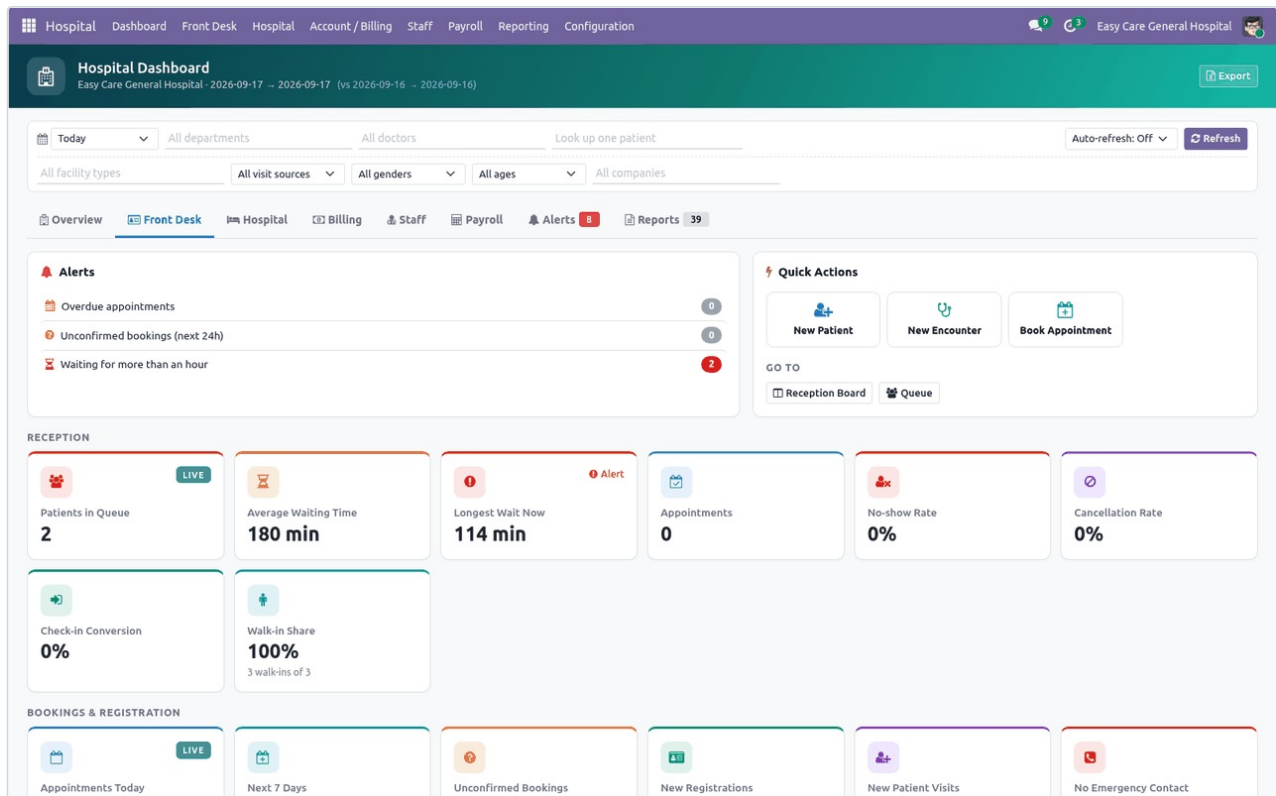


Figure 11.2 — Front Desk.

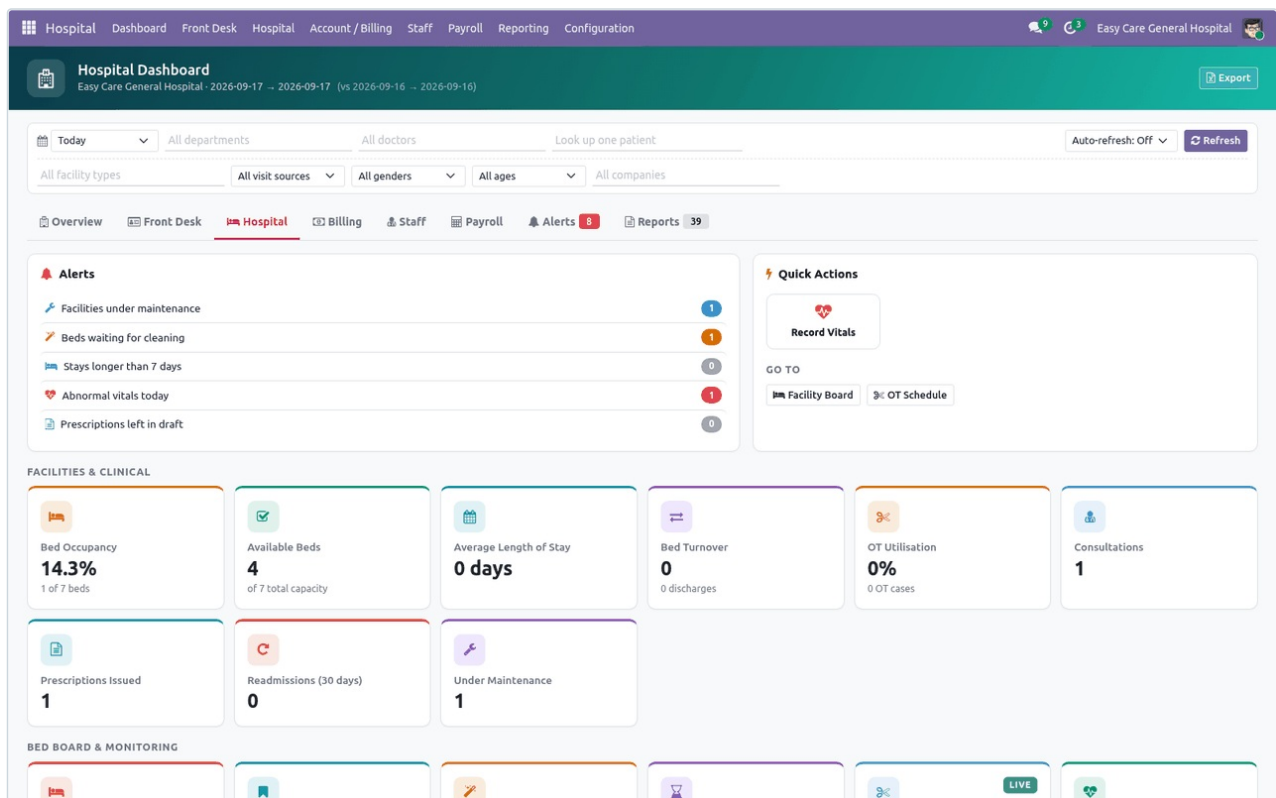


Figure 11.3 — Hospital.

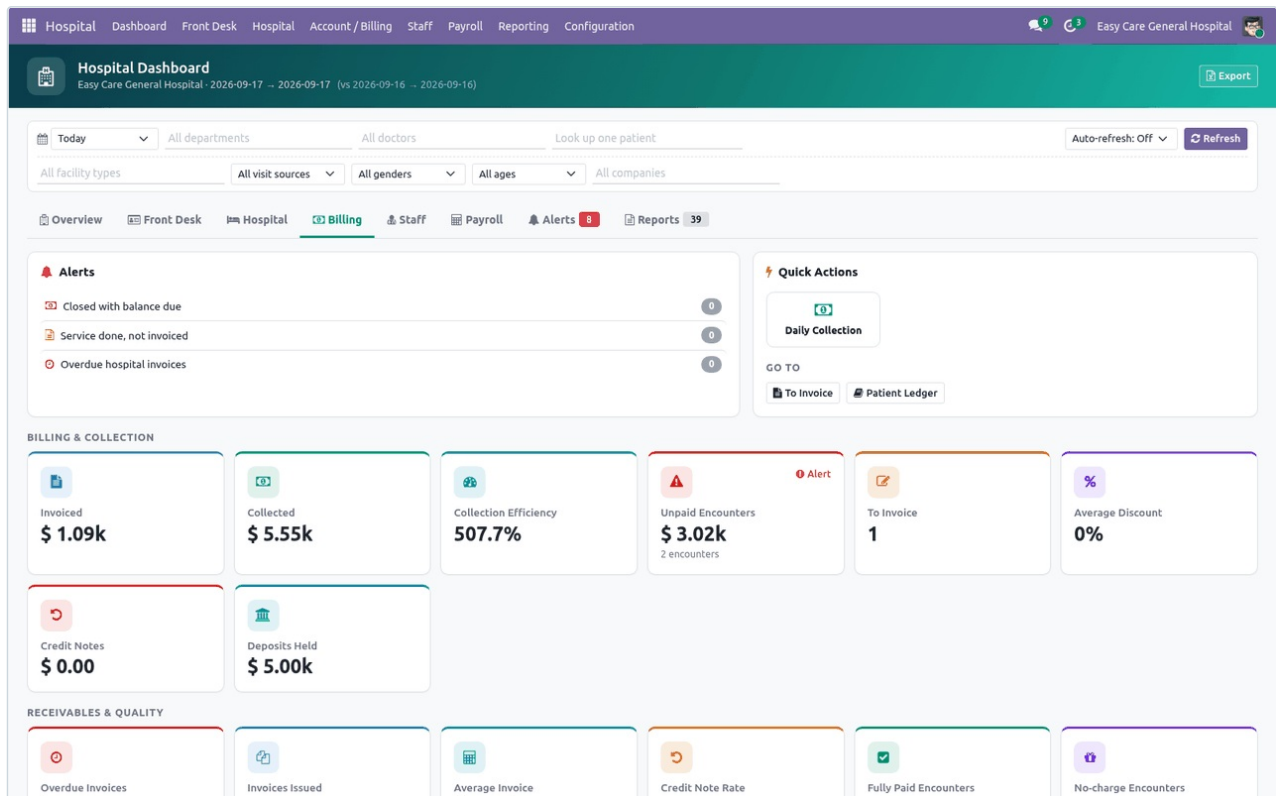


Figure 11.4 — Billing.

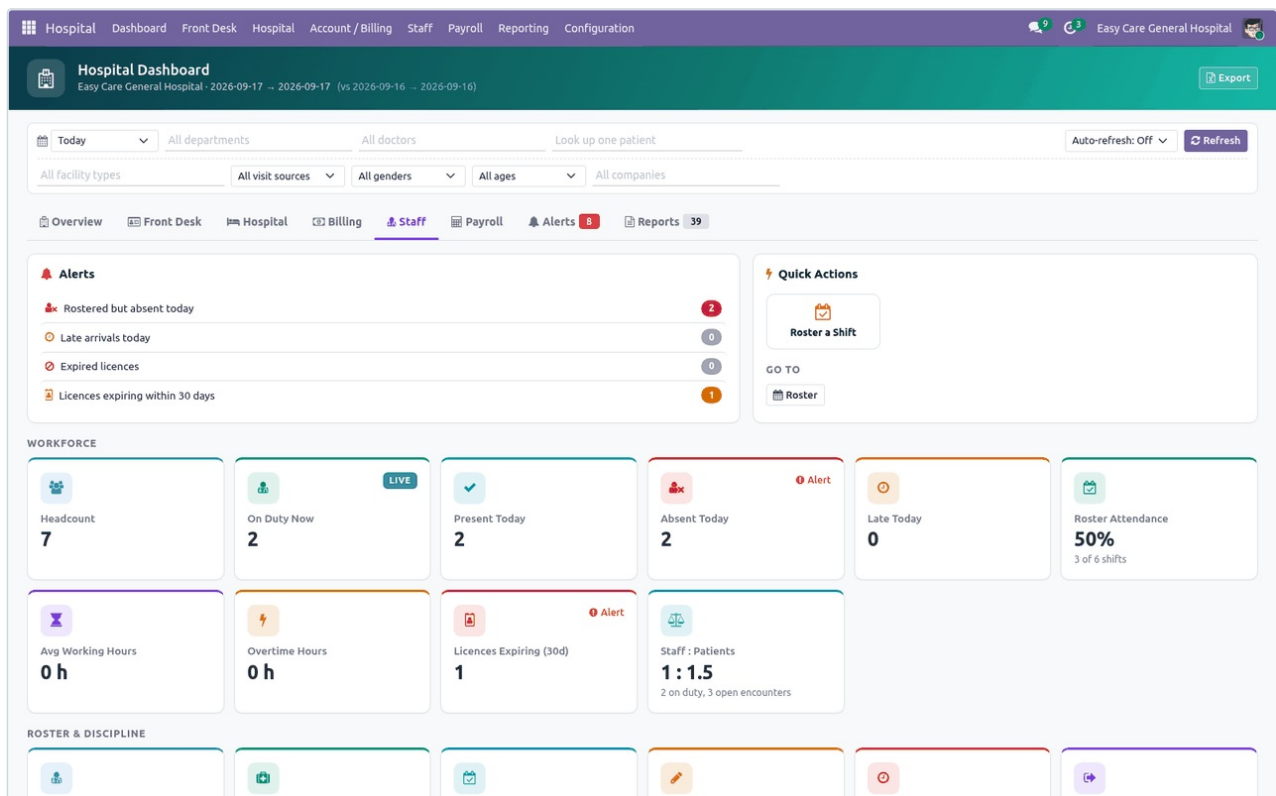


Figure 11.5 — Staff.

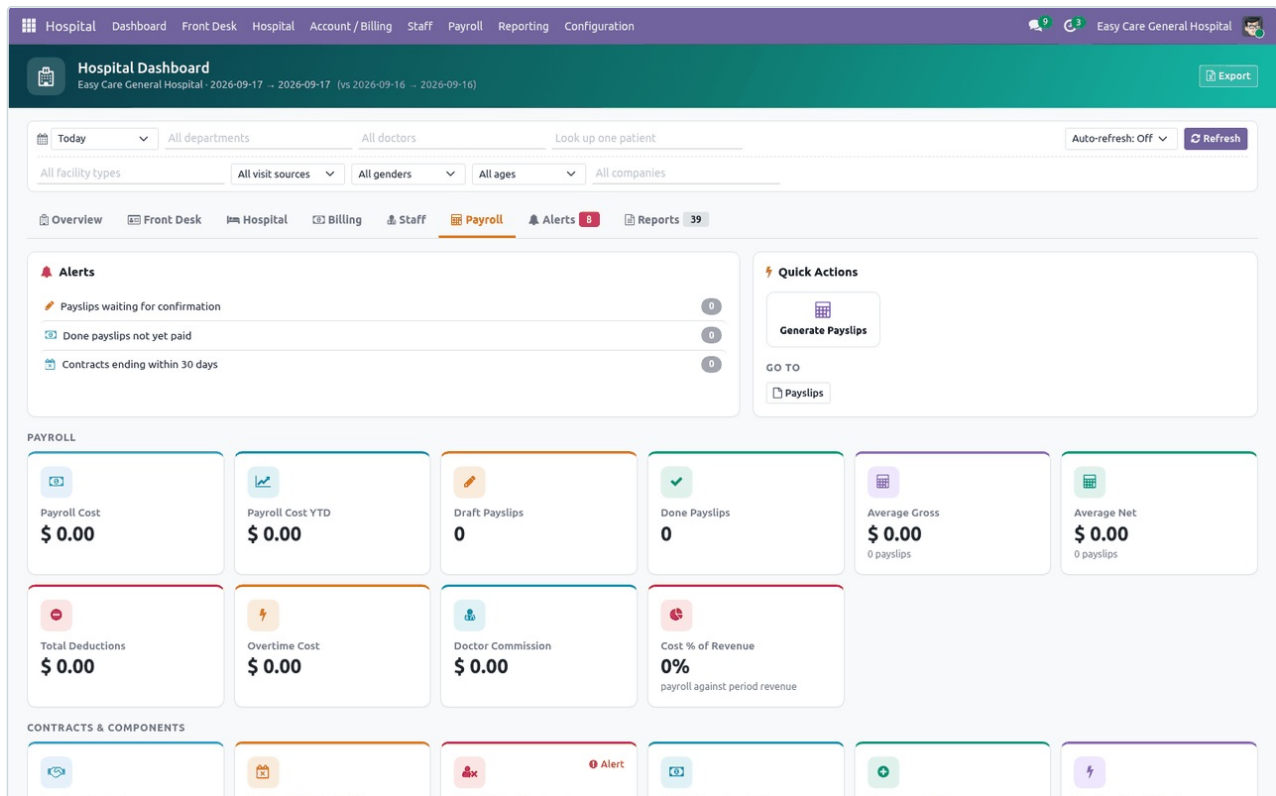


Figure 11.6 — Payroll.

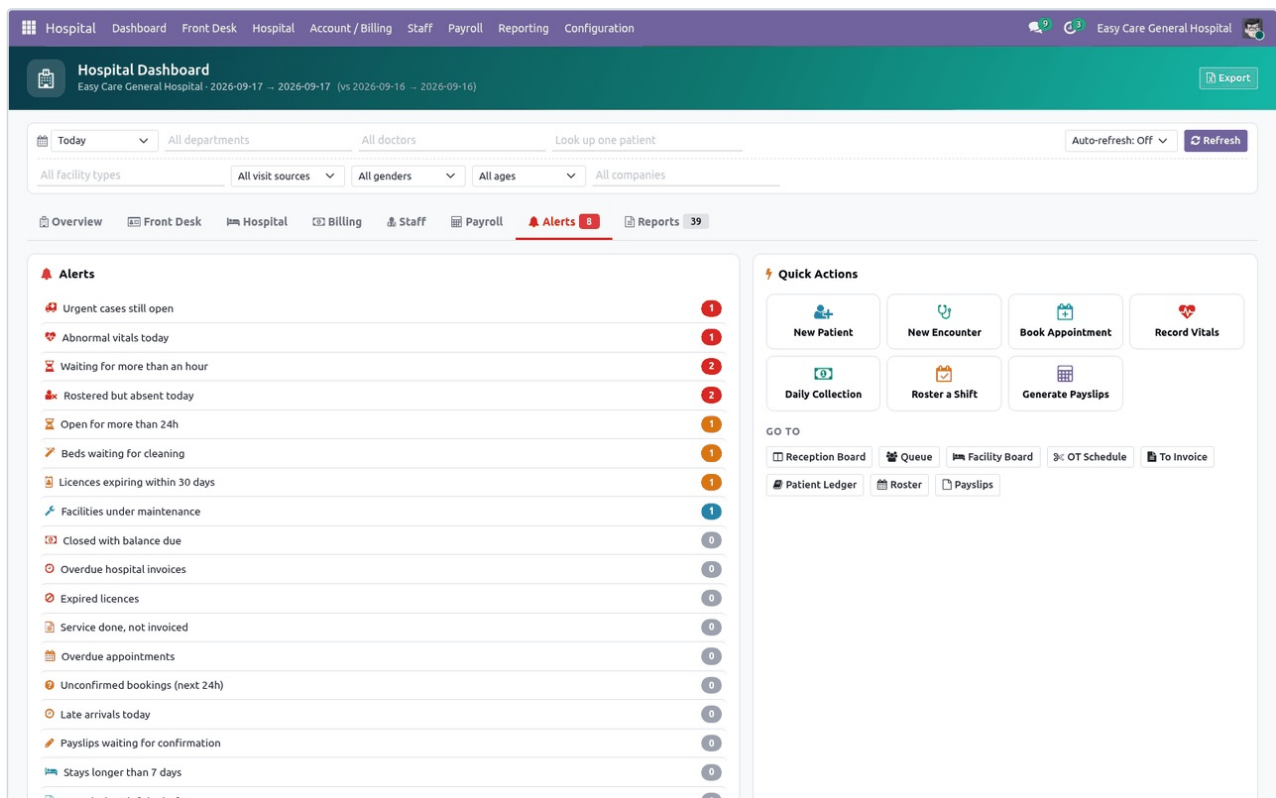


Figure 11.7 — Alerts. Each row is a problem with a count; click it to open the records concerned.

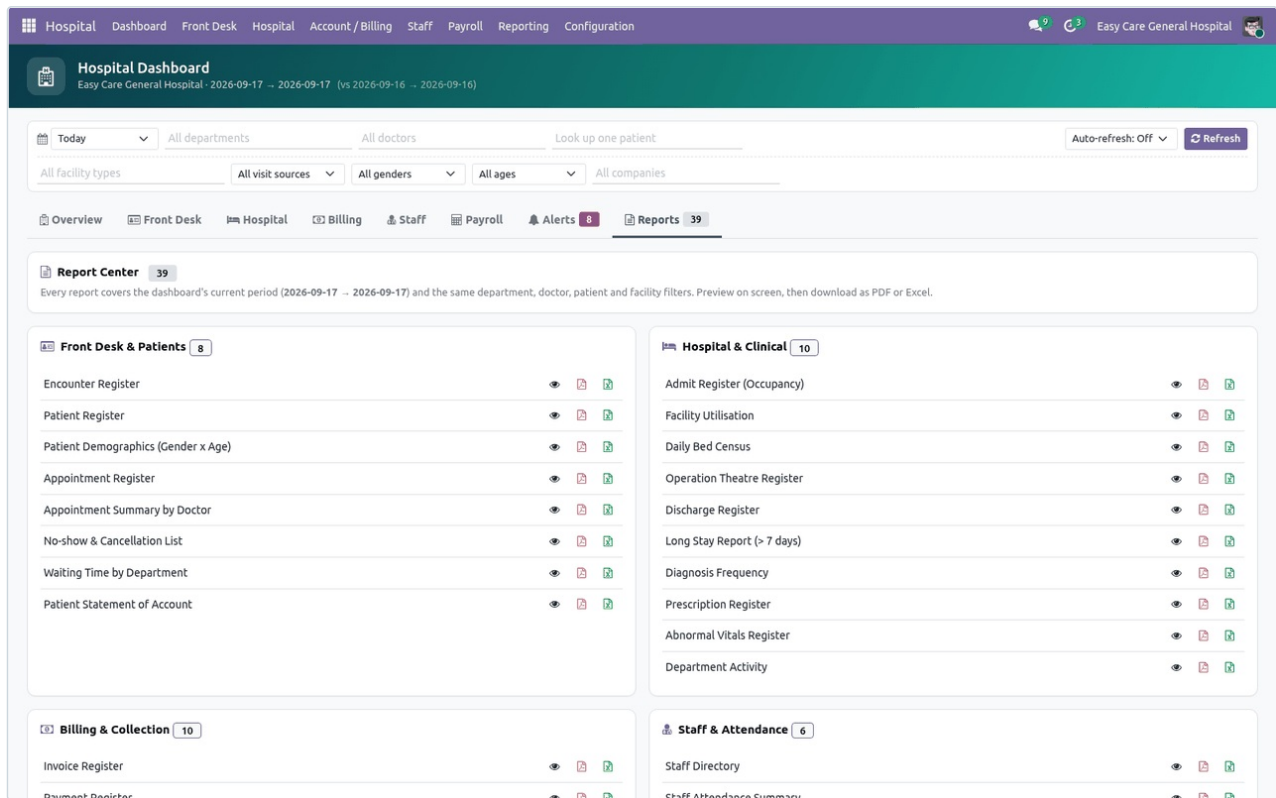


Figure 11.8 — The report centre: every report in one place, each one previewable and downloadable as PDF or Excel.

11.2 The analysis screens

Menu: **Hospital ► Reporting**. Five analyses, each opening as a **pivot table** with a graph view beside it.

Report	What you can measure	Who may open it
Encounter Analysis	Visits, waiting time, duration, revenue — by department, doctor, source, stage, age band, gender, day.	Front desk, doctor, billing
Revenue Analysis	Invoiced, paid and outstanding — by service, service type, department, doctor, patient.	Billing
Occupancy Analysis	Bed days, occupancy and bed revenue — by facility, type, department, ward.	Front desk, nurse, doctor, billing
Staff Productivity	Services delivered, patients seen and value produced per staff member.	Staff, payroll
Payroll Analysis	Gross, deductions and net — by employee, department, role, period.	Payroll

Encounter Analysis			
Date: September 2026			
Measures Total September 2026			
	Total	Paid (share)	Due (share)
Total	8,567.50	5,546.25	3,021.25
General Medicine	1,092.50	546.25	546.25
General Surgery	7,475.00	5,000.00	2,475.00

Figure 11.9 — Encounter Analysis as a pivot table.

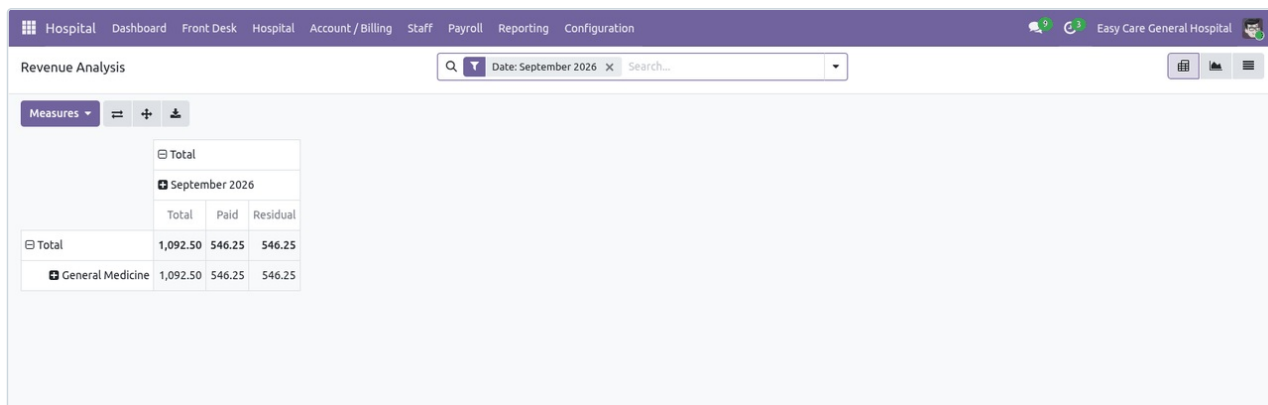


Figure 11.10 — Revenue Analysis.

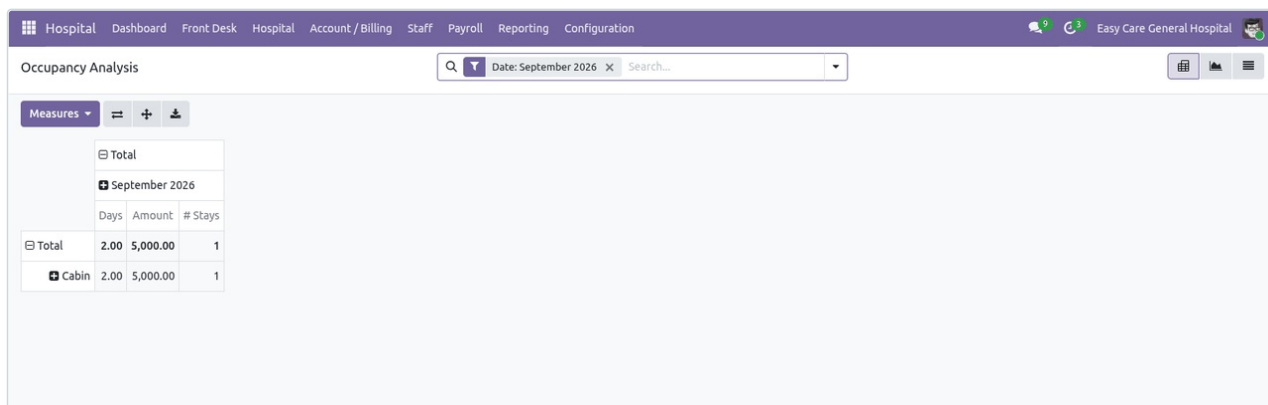


Figure 11.11 — Occupancy Analysis.

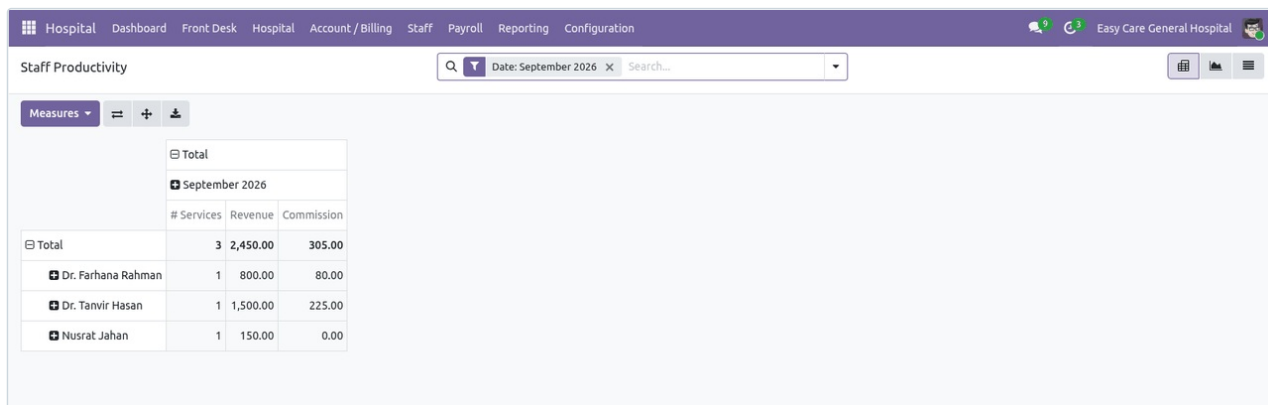


Figure 11.12 — Staff Productivity.

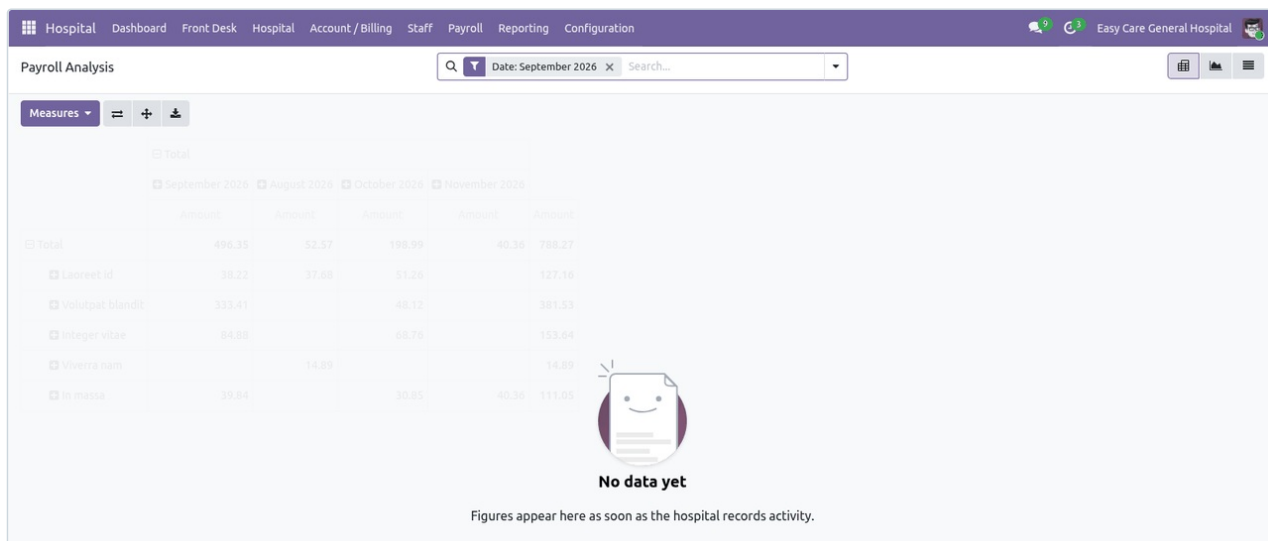


Figure 11.13 — Payroll Analysis.

Using a pivot table, for a complete beginner

1. The **rows** are groups; click the + on a row heading to break it down further (e.g. Department → Doctor).
2. The **Measures** button chooses what is counted.
3. The icons at the top-right flip between pivot, graph and list, and the **download** icon sends the table to Excel.
4. Nothing you do here changes any data. Experiment freely.

11.3 Printed documents

Eight documents can be printed as PDF. Each is printed from the record it belongs to, with a **Print** button, and all of them are also reachable from the Reports tab of the dashboard.

Document	Printed from
Patient Card (with barcode)	Patient ► Print Card
Encounter / Discharge Summary	Encounter ► Print Summary, or the discharge dialog
Prescription	Prescription ► Print
Appointment Slip	Appointment ► Print Slip
Occupancy Sheet	Admission ► Print Sheet
Daily Collection	Billing ► Daily Collection
Occupancy Statement	Reporting ► Occupancy Statement (PDF)
Payslip	Payslip ► Print

Easy Care General Hospital

PATIENT CARD

A

Abdul Karim
PAT/00001
Gender Male
Age 58y 3m
Blood B+
Mobile 01711000001
Emergency Rehana Karim 01711000101

Figure 11.14 — The patient card.

Your logo

Easy Care General Hospital
24 Hospital Road Dhaka United States
Tel: +880 2 5566 1100 - Info@easycarehospital.example

ENCOUNTER SUMMARY

Patient	Sharmin Sultana (PAT/00002)	Encounter	HMS/ENC/2026/00001
Age / Gender	32y 0m / Female	Arrival	09/17/2026 05:37:02 AM
Doctor	Dr. Farhana Rahman	Closed	
Department	General Medicine	Discharge	

Diagnoses
[DX-001] Fever, unspecified

Latest Vital Signs

BP	Pulse	Temp	SpO2	Resp.	Weight
118/76	104	38.9 °C	97	0	58.0

Services

Service	Performed By	Qty	Total
Doctor Consultation	Dr. Farhana Rahman	1.0	\$ 920.00
Injection / IV Push	Nusrat Jahan	1.0	\$ 172.50
Total			\$ 1,092.50
Paid			\$ 546.25
Balance Due			\$ 546.25

Medication on Discharge

Medicine	Dose	Frequency	Duration
Paracetamol 500 mg	500 mg	TDS - three times a day	5 Days

Follow-up: 09/22/2026

Dr. Farhana Rahman
Signature

Figure 11.15 — The encounter / discharge summary.

Easy Care General Hospital
24 Hospital Road Dhaka United States
Tel: +880 2 5566 1100 - info@easycarehospital.example

OCCUPANCY SHEET

Reference	HMS/OCC/2026/00001	Status	Active
Patient	Abdul Karim (PAT/00001)	Encounter	HMS/ENC/2026/00002
Facility	Cabin 201	Type	Cabin
Admitted	09/15/2026 08:37:02 AM	Discharged	

Charge	Billed Units	Rate	Amount
Cabin Charge	2.0	\$ 2,500.00	\$ 5,000.00

Nursing Notes

Date / Time	Note	Signature

Figure 11.16 — The occupancy sheet for one stay.

Hospital Dashboard Front Desk Hospital Account / Billing Staff Payroll Reporting Configuration

Occupancy Statement

Date From Sep 1
Date To Sep 17
Only stays still active

Facility Types All types
Department All departments

Print PDF Cancel

Figure 11.17 — The occupancy statement asks for a date range and an optional facility type or department before printing.

11.4 Easy Hospital Management AI Assist

Four small, optional features draft or narrate things a doctor, nurse or manager would otherwise write from scratch. Every one of them is a **suggestion**, never an automatic write: nothing lands on the patient's real record until a person reviews it and, in two of the four, explicitly confirms it. They only work once a Hospital Manager has configured a provider and turned the toggle on (Chapter 3, Step 12) — until then, the buttons below either say so or are simply not there.

Why this matters. An AI provider can only guess from the data already in front of it. It cannot examine a patient, and it does not know anything you have not already recorded. Treat every AI-generated line the same way this manual treats a junior colleague's first draft: useful, fast, and yours to check before it goes anywhere near a patient's record.

1. Discharge summary draft — Doctor, Nurse, Manager

Open an encounter that is Open, In Progress, Service Done or Closed and go to its **AI Summary** tab (beside Notes). Click **Generate AI Draft**: the system sends the encounter's diagnoses, prescriptions and vital-sign history to the configured provider and shows the draft underneath the info banner.

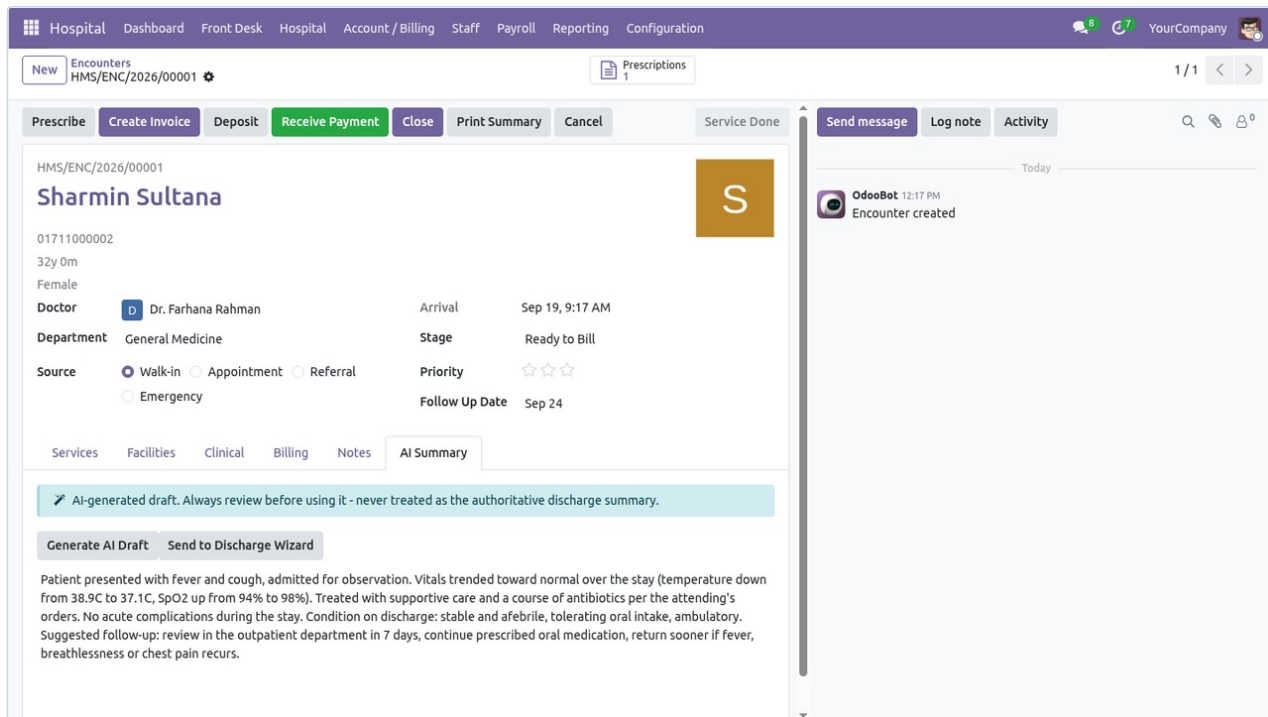


Figure 11.18 — A generated discharge draft on the encounter. The banner reads: "AI-generated draft. Always review before using it - never treated as the authoritative discharge summary."

The draft is **not** the encounter's real Discharge Summary. To use it, click **Send to Discharge Wizard** — it opens the normal discharge dialog (the same one Chapter 6 describes) with the draft text pre-filled, ready for you to edit before you confirm the discharge. Nothing is written to the authoritative summary by the AI button itself.

2. AI Suggest Tests — Doctor only

On a prescription that is not cancelled, click **AI Suggest Tests** in the header. The system reads the patient's recorded symptoms, matches them against your hospital's own diagnostic test catalogue only (it can never invent a test that is not in your catalogue), and opens a confirmation wizard with the matches pre-ticked.

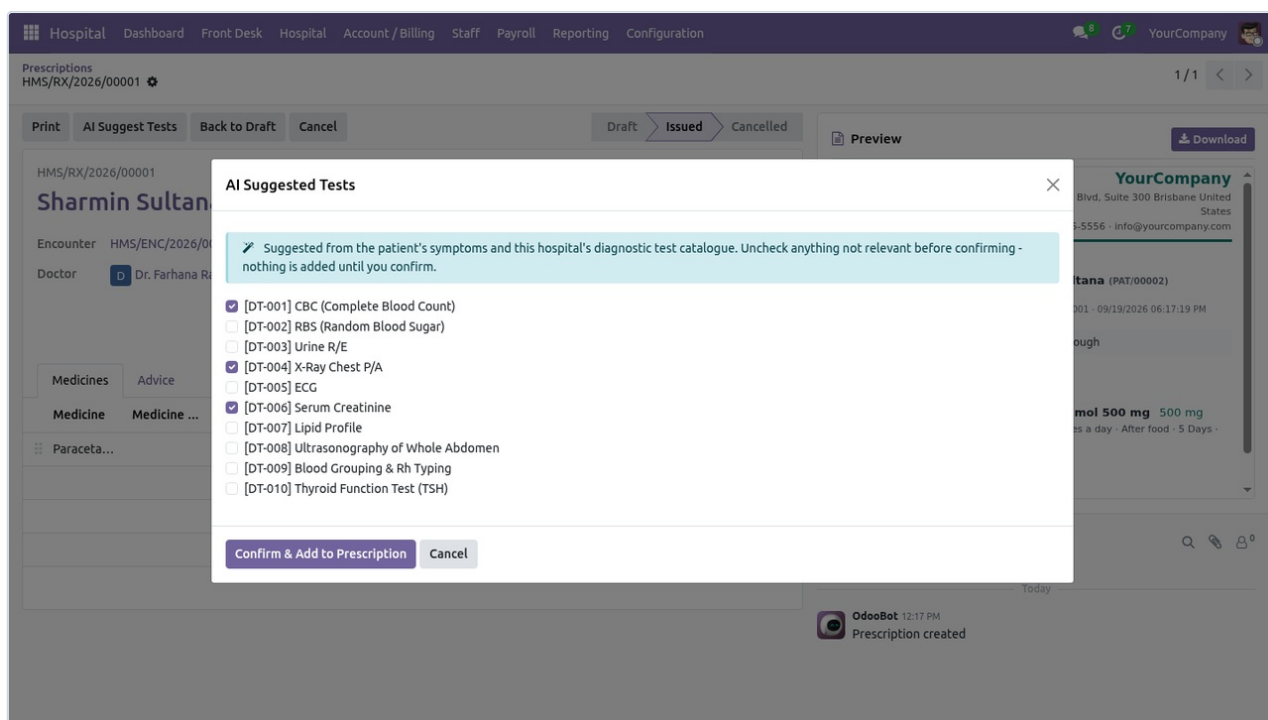


Figure 11.19 — Suggested tests, pre-ticked, ready to review. Untick anything irrelevant, then confirm.

Untick anything you do not agree with, then click **Confirm & Add to Prescription**. Only then are the ticked tests added to the prescription's Diagnostic Tests. Clicking Cancel discards the suggestions entirely.

3. AI Vitals Note — Doctor, Nurse and anyone who can open the patient record

On the patient form's **Medical** tab, under **AI Vitals Note**, click **Generate AI Vitals Trend**. The system narrates the trend across the

patient's recorded vital signs (temperature, pulse, blood pressure, SpO2, weight/BMI) in a few plain-language sentences, with the date it was generated shown beside the button.

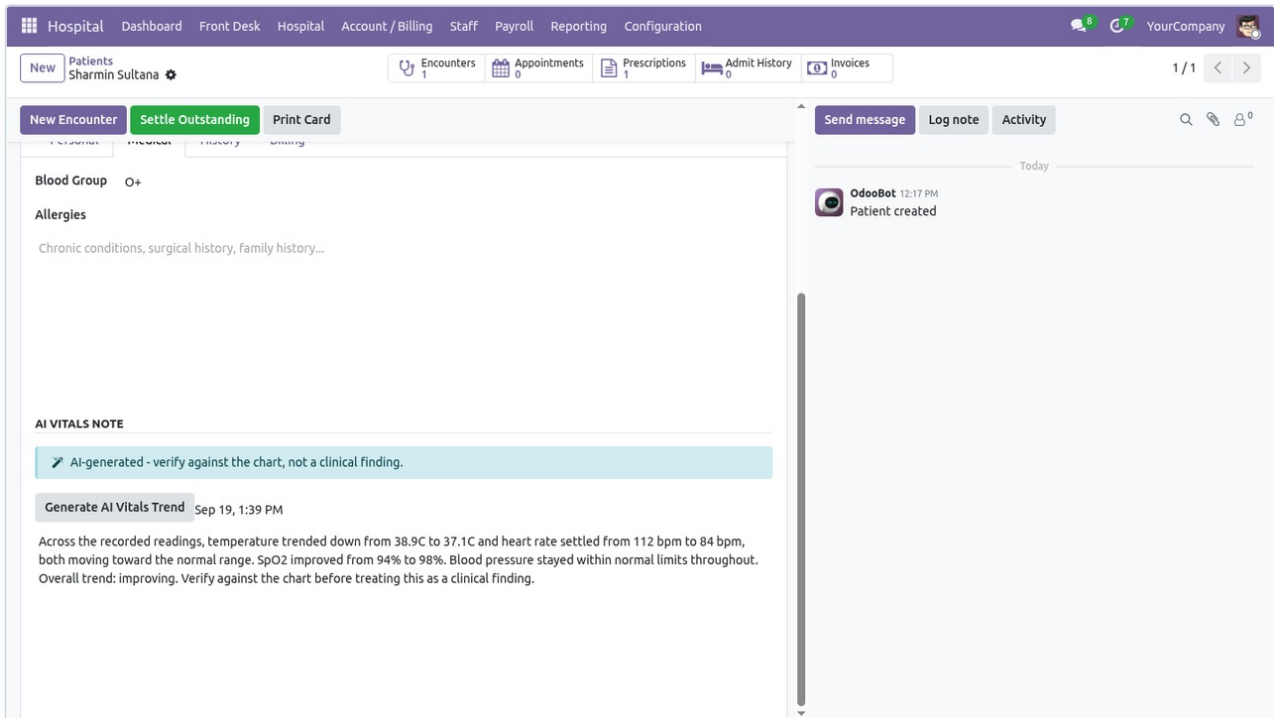


Figure 11.20 — A generated vital signs trend note. The banner reads: "AI-generated - verify against the chart, not a clinical finding."

This note is informational only — it is never used to compute anything elsewhere in the module, and it is not a diagnosis.

4. Ask the dashboard — everybody who can open the dashboard

At the top of the Hospital Dashboard, beside the filter bar, there is a small free-text box: "Ask the dashboard, e.g. 'show today's billing'." Type a question in plain English and press the arrow.

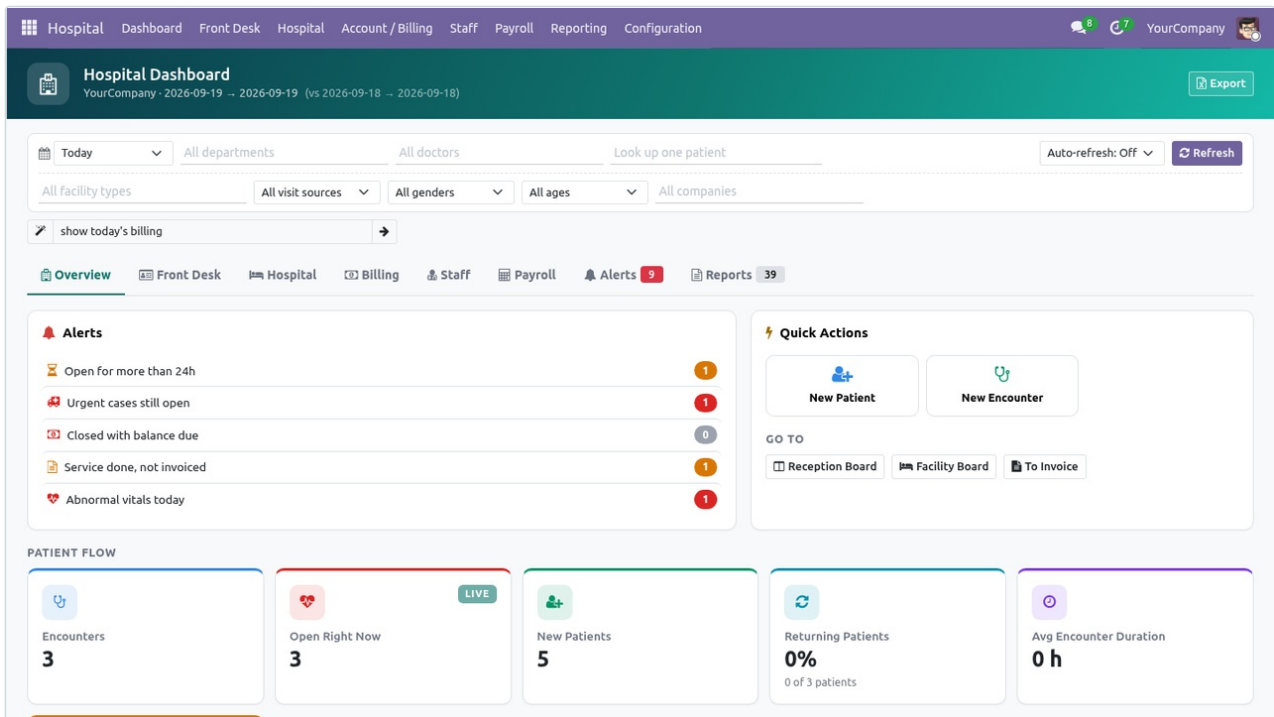


Figure 11.21 — The AI query box on the dashboard, before submitting.

The AI's only job here is to work out **which tab and which filters** answer your question — it never invents or restates a number itself. Once it decides, the dashboard simply switches to that tab with those filters applied, and every figure you then see comes from the same, already-correct dashboard rendering described in 11.1.

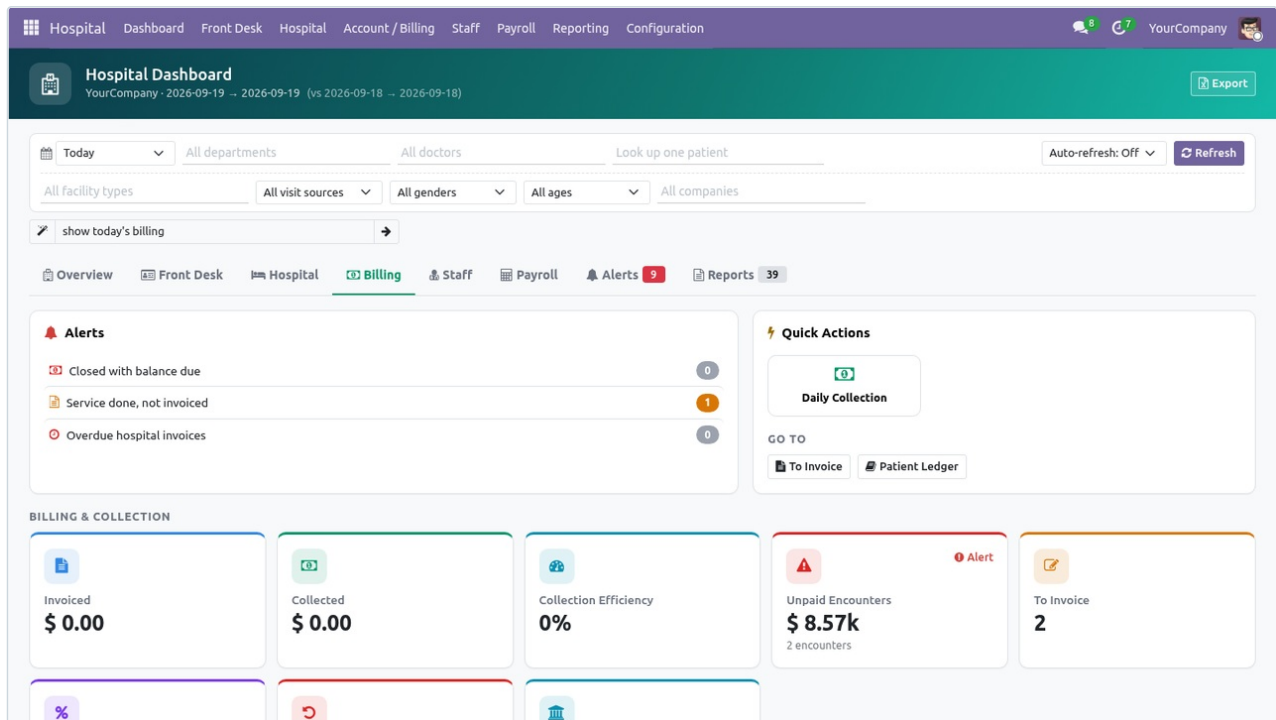


Figure 11.22 — "show today's billing" resolved to the Billing tab. Every number on this screen is the normal dashboard figure, not something the AI wrote.

If the question cannot be matched, a notification says so and asks you to rephrase it — nothing on the dashboard changes.

Chapter 12. Things the system does by itself

Six scheduled jobs run in the background. You do not start them and you cannot break them, but it helps to know they exist. A Hospital Manager can see and pause them under **Settings ► Technical ► Scheduled Actions**.

Job	How often	What it does
Mark No-show Appointments	hourly	An appointment still <i>Confirmed</i> two hours after its end time becomes No Show .
Appointment Reminders	hourly	Sends the reminder e-mail to patients whose appointment falls inside the lead time set in Settings (24 hours by default) — but only to patients who have an e-mail address.
Nightly Bed-charge Accrual	daily	Recalculates the number of days for every patient still admitted and updates their bed-charge line. This is why a nine-day stay never needs a manual quantity edit. A stay whose charge is already on a posted invoice is skipped and logged, never silently changed.
Licence Expiry Reminders	daily	Raises a to-do for the Staff Officer thirty days before a practising licence expires.
Refresh Patient Age	daily	Keeps patients' stored age and age band correct, so age-band reporting never drifts.
Overdue Invoice Follow-up	daily	Raises a follow-up activity on overdue hospital invoices.

Chapter 13. When something goes wrong

What you see	What it means	What to do
"Patient ... already has an open encounter today."	Your company blocks two visits per patient per day.	Add the service to the existing visit. A Hospital Manager can override.
"Dr. ... is not rostered at this time."	You are booking outside the doctor's roster.	Ask the Staff Officer to roster the doctor, or ask a manager to book it.
"Dr. ... already has an appointment in this time slot."	Double booking.	Pick another slot.
"... is already fully occupied for this period."	The bed's capacity is used up for those dates.	Choose another bed, or check whether an old stay was never closed.
"... is under maintenance or blocked."	The facility's status does not allow admissions.	Pick another, or have housekeeping mark it available.
"... is occupied by Discharge or transfer the patient first."	You tried to free a bed with a patient in it.	Discharge or transfer, then change the status.
"Encounter ... still occupies a facility."	You tried to finish a visit with the patient still in a bed.	Discharge first.
"All services of ... must be delivered or cancelled before closing."	A service line is still Ordered or Started.	Deliver or cancel each line.
"Only Billing can change the financial figures of an encounter."	A non-billing user touched an amount.	Ask Billing.
"Only Billing can invoice encounters and receive payments."	Same, for invoicing.	Ask Billing.
"The balance due of ... exceeds the closing threshold."	The visit owes more than your company allows to be written off at closing.	A Hospital Manager must close it with Force Close , or take the payment.
"Service '...' is already on a posted invoice and cannot be changed."	Correct accounting protection.	Credit note, or a supplementary charge.
"The amount received ... exceeds the open invoices."	Overpayment during settlement.	Record the excess as a deposit on a visit.
"Each prescription line needs exactly one of: a catalogue medicine, or a free-text medicine name."	Both boxes filled, or neither.	Fill exactly one.
"... has no running contract for this period."	The payslip cannot find a contract.	Set the contract's status to Running and check its dates.
"This staff member is already rostered on this shift that day."	Duplicate roster line.	Edit the existing line instead.
The doctor cannot see a patient's visit	The visit has a different doctor on it.	Assign the doctor on the encounter, or clear the doctor so anyone can pick it up.
Amounts stay at zero	The service has no sales price, or the line is marked Complimentary .	Price the service, or untick Complimentary.
Overtime and absence are always zero on payslips	No roster, or no attendance.	Enter the roster first; overtime is measured against it.

Chapter 14. Multi-company, sequences and languages

- **Multi-company.** Patients, visits, beds, staff, contracts and payslips are all scoped to a company. A user who works in two companies sees only what belongs to the companies currently selected in the company switcher at the top-right. Patient IDs, facility codes and department codes are unique **per company**.
 - **Sequences.** The reference numbers (patient ID, encounter, admission, prescription, payslip) come from shared sequences. A manager who wants a different numbering per company can add a company-specific sequence under **Settings ► Technical ► Sequences**.
 - **Language.** Names of departments, shifts, facility types, allergies, diagnoses, procedures, symptoms, tests and salary rules are translatable: switch your language in your user preferences and translate them once.
-

Appendix A. Every field, model by model

This appendix lists every field the module stores, with its kind and, where the field carries built-in help, that help text. Use it when you meet a field in a screen that this manual's chapters did not spell out.

How to read the Notes column: *calculated* means the system fills it and you cannot type in it; *filled automatically, editable* means it is proposed for you but you may overwrite it; *required* means the record cannot be saved without it.

A.1 Patient — `hms.patient`

Field	Label	Kind	Notes
<code>active</code>	Active	yes/no	
<code>age</code>	Age	text	calculated. Display only, e.g. 42y 3m.
<code>age_band</code>	Age Band	choice (0_12, 13_17, 18_39, 40_59, 60_plus, unknown)	calculated
<code>age_years</code>	Age Years	number	calculated. Refreshed daily by a scheduled action so it never goes stale.
<code>ai_vitals_note</code>	AI Vitals Note	rich text	AI-generated, not a clinical finding. See 11.4.
<code>ai_vitals_note_date</code>	AI Vitals Note Generated On	date & time	read-only
<code>allergy_ids</code>	Allergies	tags → <code>hms.allergy</code>	
<code>amount_due_total</code>	Outstanding	amount	calculated
<code>appointment_count</code>	Appointment Count	number	calculated
<code>appointment_ids</code>	Appointments	list → <code>hms.appointment</code>	
<code>avatar_1920</code>	Avatar	file	calculated
<code>birth_date</code>	Date of Birth	date	
<code>blood_group</code>	Blood Group	choice (a+, a-, b+, b-, ab+, ab-, o+, o-)	
<code>chronic_note</code>	Chronic Conditions	rich text	
<code>city</code>	City	text	filled automatically, editable
<code>code</code>	Patient ID	text	read-only, required
<code>company_id</code>	Company	link → <code>res.company</code>	required
<code>country_id</code>	Country	link → <code>res.country</code>	filled automatically, editable
<code>currency_id</code>	Currency	link → <code>res.currency</code>	calculated
<code>current_facility_id</code>	Current Facility	link → <code>hms.facility</code>	calculated
<code>email</code>	Email	text	filled automatically, editable
<code>emergency_contact_name</code>	Emergency Contact	text	
<code>emergency_contact_phone</code>	Emergency Phone	text	
<code>emergency_contact_relation</code>	Relation	text	
<code>encounter_count</code>	Encounter Count	number	calculated
<code>encounter_ids</code>	Encounters	list → <code>hms.encounter</code>	
<code>gender</code>	Gender	choice (male, female, other)	required
<code>id</code>	ID	number	read-only
<code>image_1920</code>	Image	file	
<code>invoice_count</code>	Invoice Count	number	calculated
<code>last_visit_date</code>	Last Visit Date	date & time	calculated
<code>marital_status</code>	Marital Status	choice (single, married, divorced, widowed)	
<code>mobile</code>	Mobile	text	required
<code>name</code>	Name	text	required

national_id	National ID	text	
occupancy_count	Occupancy Count	number	calculated
occupancy_ids	Admit History	list → hms.facility.occupancy	
partner_id	Contact	link → res.partner	read-only, required
phone	Phone	text	
prescription_count	Prescription Count	number	calculated
prescription_ids	Prescriptions	list → hms.prescription	
state_id	State	link → res.country.state	filled automatically, editable
street	Street	text	filled automatically, editable
street2	Street2	text	filled automatically, editable
zip	Zip	text	filled automatically, editable

A.2 Encounter — `hms.encounter`

Field	Label	Kind	Notes
active_occupancy_count	Active Occupancy Count	number	calculated
ai_summary_draft	AI Summary Draft	rich text	AI-generated, not the authoritative discharge summary. See 11.4.
allergy_ids	Allergies	tags → hms.allergy	calculated
amount_credited	Credited	amount	calculated
amount_due	Balance Due	amount	calculated
amount_invoiced	Invoiced	amount	calculated
amount_paid	Paid	amount	calculated
amount_tax	Taxes	amount	calculated
amount_total	Total	amount	calculated
amount_untaxed	Untaxed	amount	calculated
appointment_id	Appointment	link → hms.appointment	
close_reason	Close Reason	text	read-only
color	Color	number	
company_id	Company	link → res.company	required
currency_id	Currency	link → res.currency	calculated
current_facility_id	Current Facility	link → hms.facility	calculated
date_end	Closed On	date & time	read-only
date_service_start	Service Started	date & time	read-only. When the first service started; used for waiting-time KPIs.
date_start	Arrival	date & time	required
department_id	Department	link → hms.department	required
diagnosis_ids	Diagnoses	tags → hms.diagnosis	
discharge_summary	Discharge Summary	rich text	read-only
discharge_type	Discharge Type	choice (recovered, referred, dama, expired, other)	read-only
discount_amount	Discount	amount	calculated
doctor_id	Doctor	link → hr.employee	
doctor_user_id	Doctor User	link → res.users	calculated. Related user name for the resource to manage its access.
duration_hours	Duration Hours	number	calculated
follow_up_date	Follow Up Date	date	

id	ID	number	read-only
invoice_count	Invoice Count	number	calculated
invoice_ids	Invoices	list → account.move	
invoice_status	Invoice Status	choice (no_charge, to_invoice, partially_invoiced, invoiced)	calculated
line_ids	Services	list → hms.encounter.line	
name	Reference	text	read-only, required
note	Note	rich text	
occupancy_ids	Facilities	list → hms.facility.occupancy	
partner_id	Contact	link → res.partner	calculated
patient_age	Age	text	calculated. Display only, e.g. 42y 3m.
patient_avatar	Patient Avatar	file	calculated
patient_gender	Gender	choice	calculated
patient_id	Patient	link → hms.patient	required
patient_image	Photo	file	calculated
patient_mobile	Mobile	text	calculated
payment_ids	Payments & Deposits	list → account.payment	
payment_state	Payment State	choice (no_charge, not_paid, partial, paid, overpaid)	calculated
prescription_count	Prescription Count	number	calculated
prescription_ids	Prescriptions	list → hms.prescription	
priority	Priority	choice (0, 1, 2, 3)	
referred_by	Referred By	text	
source	Source	choice (walk_in, appointment, referral, emergency)	required
stage_id	Stage	link → hms.encounter.stage	
state	State	choice (draft, open, in_progress, service_done, closed, cancelled)	required
vital_ids	Vital Signs	list → hms.vital.sign	
waiting_minutes	Waiting Minutes	number	calculated

A.3 Encounter service line — `hms.encounter.line`

Field	Label	Kind	Notes
company_id	Company	link → res.company	calculated
currency_id	Currency	link → res.currency	calculated
date_service	Date Service	date & time	
department_id	Department	link → hms.department	filled automatically, editable
discount	Discount (%)	number	
encounter_id	Encounter	link → hms.encounter	required
encounter_state	Encounter Status	choice	calculated
id	ID	number	read-only
invoice_line_id	Invoice Line	link → account.move.line	read-only
is_free	Complimentary	yes/no	
is_invoiced	Is Invoiced	yes/no	calculated
name	Description	text	filled automatically, editable
note	Note	text	
occupancy_id	Occupancy	link → hms.facility.occupancy	read-only
patient_id	Patient	link → hms.patient	calculated
performer_id	Performed By	link → hr.employee	filled automatically, editable
performer_user_id	User	link → res.users	calculated. Related user name for the resource to manage its access.
price_subtotal	Subtotal	amount	calculated
price_total	Total	amount	calculated
price_unit	Unit Price	amount	filled automatically, editable
product_id	Service	link → product.product	required
quantity	Quantity	number	
sequence	Sequence	number	
service_type	Service Type	choice	calculated
state	State	choice (draft, ordered, started, delivered, cancelled)	required
tax_ids	Taxes	tags → account.tax	filled automatically, editable
uom_id	Unit	link → uom.uom	filled automatically, editable

A.4 Appointment — `hms.appointment`

Field	Label	Kind	Notes
color	Color Index	number	calculated
company_id	Company	link → res.company	required
date_start	Start	date & time	required
date_stop	End	date & time	calculated
department_id	Department	link → hms.department	filled automatically, editable
doctor_id	Doctor	link → hr.employee	required
doctor_user_id	User	link → res.users	calculated. Related user name for the resource to manage its access.
duration	Duration (hours)	number	filled automatically, editable
encounter_id	Encounter	link → hms.encounter	read-only
facility_id	Chamber	link → hms.facility	
id	ID	number	read-only
name	Reference	text	read-only, required
note	Note	rich text	
patient_id	Patient	link → hms.patient	required
patient_mobile	Mobile	text	calculated
reason	Reason for Visit	text	
reminder_sent	Reminder Sent	yes/no	read-only
state	State	choice (draft, confirmed, checked_in, done, cancelled, no_show)	required

A.5 Facility — hms.facility

Field	Label	Kind	Notes
active	Active	yes/no	
active_occupancy_count	Active Occupancy Count	number	calculated
billing_unit	Billing Unit	choice (per_day, per_hour, per_use)	filled automatically, editable
building	Building	text	
capacity	Capacity	number	
category	Category	choice	calculated
charge_amount	Charge Amount	amount	filled automatically, editable
charge_product_id	Charge Service	link → product.product	filled automatically, editable
child_ids	Beds	list → hms.facility	
code	Code	text	required
color	Color	number	calculated
company_id	Company	link → res.company	required
currency_id	Currency	link → res.currency	calculated
current_occupancy_id	Current Occupancy	link → hms.facility.occupancy	calculated
current_patient_id	Current Patient	link → hms.patient	calculated
department_id	Department	link → hms.department	
floor	Floor	text	
has_ac	Air Conditioning	yes/no	
has_attached_bath	Attached Bath	yes/no	
has_oxygen	Oxygen	yes/no	
has_tv	TV	yes/no	
id	ID	number	read-only
is_occupiable	Is Occupiable	yes/no	calculated. Patients can be assigned to facilities of this type.
name	Name	text	required
note	Note	long text	
occupancy_count	Occupancy Count	number	calculated
occupancy_ids	Admit History	list → hms.facility.occupancy	
parent_id	Parent (Ward)	link → hms.facility	
state	State	choice (available, reserved, occupied, cleaning, maintenance, blocked)	required
type_id	Type	link → hms.facility.type	required

A.6 Facility type — `hms.facility.type`

Field	Label	Kind	Notes
active	Active	yes/no	
billing_unit	Billing Unit	choice (per_day, per_hour, per_use)	required
category	Category	choice (cabin, room, ward, bed, icu, ot, chamber, other)	required
code	Code	text	required
color	Color	number	
default_charge_product_id	Default Charge	link → product.product	
id	ID	number	read-only
is_occupiable	Is Occupiable	yes/no	Patients can be assigned to facilities of this type.
name	Name	text	required
sequence	Sequence	number	

A.7 Admission / occupancy — `hms.facility.occupancy`

Field	Label	Kind	Notes
amount	Amount	amount	calculated
category	Category	choice	calculated
charge_product_id	Charge Product	link → product.product	filled automatically, editable
charge_quantity	Billed Units	number	calculated
company_id	Company	link → res.company	calculated
currency_id	Currency	link → res.currency	calculated
date_end	Date End	date & time	
date_start	Date Start	date & time	required
department_id	Department	link → hms.department	calculated
duration_days	Days	number	calculated
duration_hours	Hours	number	calculated
encounter_id	Encounter	link → hms.encounter	required
encounter_line_id	Encounter Line	link → hms.encounter.line	read-only
facility_id	Facility	link → hms.facility	required
facility_type_id	Type	link → hms.facility.type	calculated
id	ID	number	read-only
name	Reference	text	read-only, required
note	Note	text	
patient_id	Patient	link → hms.patient	calculated
price_unit	Price Unit	amount	filled automatically, editable
state	State	choice (reserved, active, closed, cancelled)	required
transferred_from_id	Transferred From	link → hms.facility.occupancy	read-only
transferred_to_id	Transferred To	link → hms.facility.occupancy	read-only

A.8 Department — `hms.department`

Field	Label	Kind	Notes
active	Active	yes/no	
analytic_account_id	Analytic Account	link → account.analytic.account	Invoice lines of this department carry this analytic distribution.
child_ids	Sub-departments	list → hms.department	
code	Code	text	required
color	Color	number	
company_id	Company	link → res.company	required
complete_name	Complete Name	text	calculated
facility_ids	Facilities	list → hms.facility	
id	ID	number	read-only
manager_id	Head of Department	link → hr.employee	
member_ids	Members	list → hr.employee	
name	Name	text	required
parent_id	Parent Department	link → hms.department	

A.9 Encounter stage — `hms.encounter.stage`

Field	Label	Kind	Notes
code	Code	text	
color	Color	number	
department_ids	Limited to Departments	tags → hms.department	Leave empty to use the stage in every department.
description	Description	long text	
fold	Folded in Kanban	yes/no	
id	ID	number	read-only
is_closing	Closing Stage	yes/no	
name	Name	text	required
sequence	Sequence	number	
state_to_set	Moves Encounter To	choice (open, in_progress, service_done, closed)	Dropping an encounter in this column also advances it to this state.

A.10 Prescription — `hms.prescription`

Field	Label	Kind	Notes
advice	Advice	rich text	
company_id	Company	link → res.company	calculated
date	Date	date & time	required
diagnostic_test_ids	Diagnostic Test	tags → hms.diagnostic.test	Tests advised on this prescription. They are printed beside the medicines; ordering and billing them stays on the encounter.
doctor_id	Doctor	link → hr.employee	filled automatically, editable, required
encounter_id	Encounter	link → hms.encounter	required
follow_up_date	Follow Up Date	date	
id	ID	number	read-only
line_count	Line Count	number	calculated
line_ids	Medicines	list → hms.prescription.line	
name	Reference	text	read-only, required
patient_id	Patient	link → hms.patient	calculated
state	State	choice (draft, issued, cancelled)	required
symptom_ids	Symptoms	tags → hms.symptoms	What the patient reports. Maintained under Configuration.

A.11 Prescription line — `hms.prescription.line`

Field	Label	Kind	Notes
dosage	Dosage	text	e.g. 500 mg, 1 tablet, 5 ml
duration_uom	Duration Uom	choice (days, weeks, months)	
duration_value	Duration	number	
frequency	Frequency	choice (od, bd, tds, qds, sos, stat, custom)	
id	ID	number	read-only
instruction	Instruction	text	
medicine_name	Medicine (free text)	text	
patient_id	Patient	link → hms.patient	calculated
prescription_id	Prescription	link → hms.prescription	required
product_id	Medicine	link → product.product	
quantity	Quantity	number	filled automatically, editable
route	Route	choice (oral, iv, im, sc, topical, inhalation, other)	
sequence	Sequence	number	
timing	Timing	choice (before_food, after_food, with_food)	

A.12 Vital signs — `hms.vital.sign`

Field	Label	Kind	Notes
abnormal_note	Out of Range	text	calculated
blood_sugar	Blood Sugar (mmol/L)	number	
bmi	BMI	number	calculated
bmi_category	Bmi Category	choice (under, normal, over, obese)	calculated
bp_diastolic	BP Diastolic	number	
bp_systolic	BP Systolic	number	
company_id	Company	link → res.company	calculated
date	Date	date & time	required
encounter_id	Encounter	link → hms.encounter	required
height	Height (cm)	number	
id	ID	number	read-only
is_abnormal	Abnormal	yes/no	calculated
note	Note	text	
pain_score	Pain (0-10)	choice (0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10)	
patient_id	Patient	link → hms.patient	calculated
pulse	Pulse (bpm)	number	
recorded_by_id	Recorded By	link → hr.employee	
respiration_rate	Respiration (/min)	number	
spo2	SpO2 (%)	number	
temperature	Temperature	number	
temperature_uom	Temperature Uom	choice (c, f)	required
weight	Weight (kg)	number	

A.13 Diagnosis — `hms.diagnosis`

Field	Label	Kind	Notes
active	Active	yes/no	
category	Category	text	
code	Code	text	
color	Color	number	
company_id	Company	link → res.company	
description	Description	long text	
id	ID	number	read-only
name	Name	text	required

A.14 Procedure — `hms.procedure`

Field	Label	Kind	Notes
active	Active	yes/no	
category	Category	text	
code	Code	text	
company_id	Company	link → res.company	
description	Description	long text	
id	ID	number	read-only
name	Name	text	required
product_id	Charge Service	link → product.product	

A.15 Symptom — `hms.symptoms`

Field	Label	Kind	Notes
active	Active	yes/no	
category	Category	text	
code	Code	text	
color	Color	number	
company_id	Company	link → res.company	
description	Description	long text	
id	ID	number	read-only
name	Name	text	required

A.16 Diagnostic test — `hms.diagnostic.test`

Field	Label	Kind	Notes
active	Active	yes/no	
category	Category	text	Pathology, Radiology, Cardiology...
code	Code	text	
company_id	Company	link → res.company	
description	Description	long text	
id	ID	number	read-only
name	Name	text	required
product_id	Charge Service	link → product.product	Service invoiced when this test is actually performed.
sample_type	Sample Type	text	Blood, urine, swab...

A.17 Allergy — `hms.allergy`

Field	Label	Kind	Notes
active	Active	yes/no	
category	Category	choice (drug, food, environment, other)	
code	Code	text	
color	Color	number	
company_id	Company	link → res.company	
description	Description	long text	
id	ID	number	read-only
name	Name	text	required

A.18 Specialty — `hms.specialty`

Field	Label	Kind	Notes
active	Active	yes/no	
code	Code	text	
color	Color	number	
description	Description	long text	
id	ID	number	read-only
name	Name	text	required
sequence	Sequence	number	

A.19 Duty shift — `hms.shift`

Field	Label	Kind	Notes
active	Active	yes/no	
break_minutes	Break Minutes	number	
code	Code	text	
color	Color	number	
company_id	Company	link → res.company	
crosses_midnight	Crosses Midnight	yes/no	calculated
duration_hours	Duration Hours	number	calculated
grace_minutes	Late Grace (min)	number	
id	ID	number	read-only
name	Name	text	required
time_from	Starts	number	required
time_to	Ends	number	required

A.20 Roster line — `hms.staff.shift`

Field	Label	Kind	Notes
color	Color	number	calculated
company_id	Company	link → res.company	
date	Date	date	required
department_id	Department	link → hms.department	filled automatically, editable
employee_id	Staff	link → hr.employee	required
facility_id	Ward / Area	link → hms.facility	
hms_role	Role	choice	calculated
id	ID	number	read-only
note	Note	text	
shift_id	Shift	link → hms.shift	required
state	State	choice (planned, confirmed, done, absent)	required

A.21 Staff contract — `hms.staff.contract`

Field	Label	Kind	Notes
allowance_ids	Allowances	list → hms.contract.allowance	
allowance_total	Allowance Total	amount	calculated
company_id	Company	link → res.company	required
currency_id	Currency	link → res.currency	calculated
date_end	Date End	date	
date_start	Date Start	date	required
department_id	Department	link → hms.department	filled automatically, editable
employee_id	Employee	link → hr.employee	required
hms_role	Role	choice	calculated
hourly_rate	Hourly Rate	amount	filled automatically, editable
id	ID	number	read-only
job_title	Job Title	text	filled automatically, editable
name	Name	text	required
note	Note	rich text	
overtime_rate_multiplier	Overtime Rate Multiplier	number	
state	State	choice (draft, open, close, cancel)	required
structure_id	Structure	link → hms.salary.structure	required
trial_end	Trial Period End	date	
wage	Wage	amount	required. Monthly basic wage.
working_days_per_month	Working Days Per Month	number	
working_hours_per_day	Working Hours Per Day	number	

A.22 Contract allowance — `hms.contract.allowance`

Field	Label	Kind	Notes
amount	Amount	amount	required
contract_id	Contract	link → hms.staff.contract	required
currency_id	Currency	link → res.currency	calculated
id	ID	number	read-only
is_taxable	Is Taxable	yes/no	
name	Name	text	required

A.23 Salary structure — `hms.salary.structure`

Field	Label	Kind	Notes
code	Code	text	required
company_id	Company	link → res.company	
id	ID	number	read-only
journal_id	Journal	link → account.journal	
name	Name	text	required
note	Note	long text	
parent_id	Parent Structure	link → hms.salary.structure	Rules of the parent are applied too, before this structure's own rules.
rule_count	Rule Count	number	calculated
rule_ids	Salary Rules	list → hms.salary.rule	

A.24 Salary rule — `hms.salary.rule`

Field	Label	Kind	Notes
account_credit_id	Credit Account	link → account.account	
account_debit_id	Debit Account	link → account.account	
active	Active	yes/no	
amount_fix	Fixed Amount	number	
amount_percentage	Percentage (%)	number	
amount_percentage_base	Percentage Based On	text	
amount_python_compute	Python Code	long text	Available: payslip, contract, employee, worked_days, inputs, categories, rules, floor, ceil, round, min, max, abs. Set <code>result</code> (and optionally <code>result_qty</code> , <code>result_rate</code>).
amount_select	Amount Select	choice (fix, percentage, code)	required
appears_on_payslip	Appears On Payslip	yes/no	
category_id	Category	link → hms.salary.rule.category	required
code	Code	text	required. Used as a variable in later rules, e.g. rules.BASIC
condition_python	Python Condition	long text	Set <code>result</code> to True or False.
condition_range	Range Based On	text	Expression evaluated in the rule namespace, e.g. contract.wage
condition_range_max	Maximum	number	
condition_range_min	Minimum	number	
condition_select	Condition Select	choice (none, range, python)	required
id	ID	number	read-only
name	Name	text	required
note	Note	long text	
sequence	Sequence	number	required
structure_id	Structure	link → hms.salary.structure	required

A.25 Salary rule category — `hms.salary.rule.category`

Field	Label	Kind	Notes
code	Code	text	required
id	ID	number	read-only
name	Name	text	required
note	Note	long text	
parent_id	Parent	link → hms.salary.rule.category	
sequence	Sequence	number	

A.26 Payslip — `hms.payslip`

Field	Label	Kind	Notes
absent_days	Absent Days	number	read-only
commission_amount	Commission Amount	amount	read-only
company_id	Company	link → res.company	required
contract_id	Contract	link → hms.staff.contract	filled automatically, editable
currency_id	Currency	link → res.currency	calculated
date_from	Date From	date	required
date_to	Date To	date	required
department_id	Department	link → hms.department	calculated
employee_id	Employee	link → hr.employee	required
gross	Gross	amount	calculated
hms_role	Role	choice	calculated
id	ID	number	read-only
late_minutes	Late Minutes	number	read-only
line_ids	Computation	list → hms.payslip.line	
move_id	Journal Entry	link → account.move	read-only
name	Reference	text	read-only, required
net	Net	amount	calculated
note	Note	long text	
overtime_hours	Overtime Hours	number	read-only
payslip_run_id	Batch	link → hms.payslip.run	
state	State	choice (draft, verified, done, paid, cancelled)	required
structure_id	Structure	link → hms.salary.structure	filled automatically, editable
total_deduction	Total Deduction	amount	calculated
worked_days	Worked Days	number	read-only

A.27 Payslip line — `hms.payslip.line`

Field	Label	Kind	Notes
amount	Amount	amount	
appears_on_payslip	Appears On Payslip	yes/no	
category_id	Category	link → hms.salary.rule.category	
code	Code	text	required
currency_id	Currency	link → res.currency	calculated
employee_id	Employee	link → hr.employee	calculated
id	ID	number	read-only
name	Name	text	required
quantity	Quantity	number	
rate	Rate	number	
rule_id	Rule	link → hms.salary.rule	
sequence	Sequence	number	
slip_id	Slip	link → hms.payslip	required
total	Total	amount	calculated

A.28 Payslip batch — `hms.payslip.run`

Field	Label	Kind	Notes
company_id	Company	link → res.company	required
currency_id	Currency	link → res.currency	calculated
date_end	Date End	date	required
date_start	Date Start	date	required
department_id	Department	link → hms.department	
id	ID	number	read-only
name	Name	text	required
slip_count	Slip Count	number	calculated
slip_ids	Payslips	list → hms.payslip	
state	State	choice (draft, close)	required
total_net	Total Net	amount	calculated

A.29 AI Provider — `hms.ai.provider`

Configuration ► AI ► AI Providers. See Chapter 3, Step 12 for how to fill this in. The two secret fields (`api_key_secret` , the value actually used to call the provider) are **not listed below and never shown anywhere in the web client** — not even to an administrator — by design (Odoo's `groups="."` restriction). What follows are the ordinary, visible fields only.

Field	Label	Kind	Notes
active	Active	yes/no	
allow_restricted_data	Allowed for Restricted Data	yes/no	always on and locked for Ollama
api_key	API Key	text (write-only)	always reads back blank. Type a new key and save to replace it; leave blank to keep the current one.
api_key_set	(shown as "A key is currently stored.")	yes/no	calculated. The only visible sign that a key exists.
api_version	API Version	text	Anthropic only, e.g. 2023-06-01
base_url	Base URL	text	
chat_model	Chat Model	text	exact model name/id used by the provider
company_id	Company	link → res.company	required
context_window	Context Window	number	informational only
id	ID	number	read-only
is_default	Default Provider	yes/no	only one active provider may be the default; this is the one the 4 AI features actually use
last_test_date	Last Test Date	date & time	read-only
last_test_message	Last Test Message	text	read-only
last_test_state	Last Test State	choice (ok, error)	read-only
max_output_tokens	Max Output Tokens	number	
name	Name	text	required
organization_id	Organization ID	text	OpenAI only
provider_type	Provider	choice (openai, anthropic, ollama)	required, default Ollama
sequence	Sequence	number	
system_role	System Message Role	choice (system, developer)	OpenAI only
temperature	Temperature	number	
timeout	Timeout (s)	number	required
use_temperature	Send Temperature	yes/no	

A.30 AI Usage Log — `hms.ai.audit.log`

Configuration ► AI ► AI Usage Log. Manager-only, read-only from the screen: no button on this list creates, edits or deletes a row — every row is written by the system itself the moment an AI feature is used, and stays forever.

Field	Label	Kind	Notes
blocked_reason	Blocked Reason	text	read-only. Filled only when <code>status</code> is Blocked.
company_id	Company	link → res.company	read-only
endpoint_url	Endpoint URL	text	read-only
error	Error	long text	read-only
estimated_cost	Estimated Cost	amount	read-only
feature	Feature	choice (discharge_summary, test_suggestion, vitals_trend, dashboard_query)	read-only
id	ID	number	read-only
is_external	External Call	yes/no	read-only. True when the request went to a cloud provider (OpenAI/Anthropic) rather than a local Ollama.
latency_ms	Latency (ms)	number	read-only
model_name	Model Name	text	read-only
prompt_excerpt	Prompt Excerpt	long text	read-only. Restricted patient-data markers already stripped before storage.
prompt_hash	Prompt Hash	text	read-only
provider_id	Provider	link → hms.ai.provider	read-only
provider_type	Provider Type	choice (openai, anthropic, ollama)	read-only
res_id	Record ID	number	read-only. The encounter/prescription/patient the call was made for.
res_model	Record Model	text	read-only
response_hash	Response Hash	text	read-only
status	Status	choice (pending, done, error, blocked)	read-only
token_in	Tokens In	number	read-only
token_out	Tokens Out	number	read-only
user_id	User	link → res.users	read-only

Appendix B. Who may do what

R = read · **W** = edit · **C** = create · **D** = delete · **—** = no access at all. This table is the access rights the module installs. On top of it, record rules narrow *which* records a person sees — most importantly, a doctor sees their own encounters plus unassigned ones, and every employee sees only their own payslips.

Screen	Reception	Nurse	Doctor	Billing	Staff	Payroll	Manager
Admissions	RWC	RWC	RWC	RW	—	—	RWCD
AI Providers	—	—	—	—	—	—	RWCD
AI Usage Log	—	—	—	—	—	—	R
Allergies	RWC	RWC	RWC	R	—	—	RWCD
Appointments	RWCD	R	RWC	R	—	—	RWCD
Contracts	—	—	—	—	R	RWCD	RWCD
Departments	R	R	R	R	RWC	R	RWCD
Diagnoses	R	R	RWC	R	—	—	RWCD
Diagnostic tests	R	R	RWC	R	—	—	RWCD
Encounter services	RWCD	RWC	RWCD	RWCD	—	—	RWCD
Encounter stages	R	R	R	R	R	R	RWCD
Encounters	RWC	RW	RW	RW	—	—	RWCD
Facilities	RW	RW	R	R	R	—	RWCD
Facility types	R	R	R	R	R	R	RWCD
Patients	RWC	R	RW	R	—	—	RWCD
Payslip batches	—	—	—	—	—	RWC	RWCD
Payslips	—	—	—	—	—	RWC	RWCD
Prescription lines	R	R	RWCD	R	—	—	RWCD
Prescriptions	R	R	RWCD	R	—	—	RWCD
Procedures	R	R	RWC	R	—	—	RWCD
Roster	R	R	R	—	RWCD	R	RWCD
Salary rules	—	—	—	—	—	RWCD	RWCD
Salary structures	—	—	—	—	—	RWCD	RWCD
Shifts	R	R	R	R	RWCD	R	RWCD
Specialties	R	R	R	R	RWC	R	RWCD
Symptoms	R	R	RWC	R	—	—	RWCD
Vital signs	R	RWCD	RWCD	—	—	—	RWCD

The 4 AI Assist features are page/button-level, not separate screens, so they are not rows above — here is who sees each one:

AI feature	Who sees it
Configure AI Providers / read the AI Usage Log	Manager only
Encounter "AI Summary" tab (Generate AI Draft, Send to Discharge Wizard)	Doctor, Nurse, Manager
Prescription "AI Suggest Tests" button	Doctor only
Patient "AI Vitals Note" (Generate AI Vitals Trend)	Whoever can already open the patient's Medical tab — no extra restriction
Dashboard "Ask the dashboard" query box	Whoever can already open the Hospital Dashboard

Appendix C. Glossary

Word	What it means here
Encounter	One visit. The record everything else hangs off.
Occupancy / Admission	One patient's stay in one bed, cabin, ICU bed or theatre. A transfer ends one occupancy and starts another.
Facility	Any place a patient can be: cabin, room, ward, ward bed, ICU bed, operation theatre, consultation chamber.
Service	Anything you charge for. Technically an Odoo product flagged as a hospital service.
Service line	One charged service on one visit.
Stage	A column of the Reception Board.
State	The visit's own lifecycle: Draft, Open, In Progress, Service Done, Closed, Cancelled.
Payment state	No Charge, Not Paid, Partially Paid, Paid, Overpaid — calculated, never typed.
Deposit / advance	Money taken before there is an invoice, held against a visit.
Settlement	Receiving one amount and spreading it over a patient's unpaid invoices.
Roster	Who works which shift on which day.
Payslip batch	One month's payslips, generated and handled together.
Chatter	The message and history panel at the bottom (or side) of a record. Everything important is logged there.
Kanban	The card view. List is the table view. Pivot is the cross-table used for analysis.
Archive	Hide a record without deleting it, keeping its history. Prefer this to deleting.

Appendix D. Keyboard and habits worth learning

Habit	Why
Search by patient ID or mobile , never by scrolling	Prevents duplicate patients.
Read the red allergy banner out loud at check-in	It is the module's only clinical safety alarm.
Use Check In on the appointment instead of creating an encounter by hand	It links the appointment, the visit and the consultation fee in one click.
Deliver service lines as they happen, not at the end of the day	The visit then finishes itself, and Billing is never waiting.
Discharge from the facility before trying to close the visit	Half the "I can't close it" problems disappear.
Enter next week's roster before this week ends	Otherwise appointments cannot be booked.
Archive, do not delete	Deleting is blocked for anything with history, on purpose.
Read the chatter when something looks wrong	Transfers, closures, settlements and reschedules are all logged there with who and when.

End of manual — Easy Hospital Management with AI 19.0.1.7.0 for Odoo 19 Community.