NABZ / TRAINING DOCUMENTATION

Complete Clinic Workflow

A practical operating guide from clinic setup to follow-up

Version reviewed: 3 November 2026
Audience: clinic owners, clinical teams, front desk, and patients as applicable

This publication documents controls visible in the checked NABZ application source. Requested functions that are not exposed are identified separately. A release note at the end explains the screenshot and deployment verification limits.

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Start here. NABZ has two connected experiences: the clinic console and the patient portal. A patient record made at the front desk is a clinic record; a patient portal account is created by the patient when joining a listed clinic. Every clinic keeps its own patient file, appointments, consultations, and bills.

1. The workflow at a glance

Stage	Who leads	Where in NABZ	What changes
Create the clinic	Owner	/signup	Owner login and clinic workspace are created together.
Configure the clinic	Owner	Settings	Clinic details, doctors, OPD hours, prices, listing, and message rules are saved.
Register a patient	Receptionist or patient	Patients / patient signup	A clinic patient file and UHID are created or linked.
Book a visit	Receptionist or patient	Appointments	Appointment is **BOOKED** immediately and receives a token.
Arrive and wait	Patient or receptionist	Patient Appointments / Today's queue	Appointment moves to **ARRIVED**.
Consult	Doctor or owner	Today's queue / Consultation	Notes and prescription are saved; visit becomes **IN CONSULT**.
Finish and bill	Doctor or owner	Consultation / Billing	Visit becomes **COMPLETED**; a bill is created from the doctor's fee.
Dispense and collect	Pharmacy counter or front desk	Medicines / Billing	Linked medicine stock and the bill are updated; payment is recorded.
Follow up and review	All roles as permitted	Patient record / WhatsApp / Reports	History remains in the clinic; owner reviews performance.

Status path: BOOKED -> ARRIVED -> IN CONSULT -> COMPLETED. A booking may instead become CANCELLED or NO SHOW. The clinic queue has controls to correct some mistaken status changes; a completed visit remains completed.

2. Set up the clinic before the first patient

Step 1 - Create the owner account and clinic

1. Open **Create clinic** at /signup. 2. Enter **Clinic name**, **Your name**, **Phone**, **Email**, **State**, **City**, optional **Clinic address**, and a password of at least eight characters. 3. Select **Create clinic & start trial**. NABZ creates the clinic and signs in the owner.

Result: the owner reaches Dashboard. This signup is for one clinic and its owner login. A doctor joining an existing clinic receives a login from that clinic's owner in Settings. The signup form does not show an OTP or separate email verification step.

Step 2 - Complete Clinic details

1. Open **Settings -> Clinic details**. 2. Check **Clinic name**, **Phone**, **Email**, **Address**, **State**, **City**, **PIN code**, optional **GSTIN**, **Follow-up window (days)**, and **Footer note**. 3. Choose **Save clinic details**.

Result: these details appear on prescriptions and receipts. State and city also determine where the public clinic listing appears. A follow-up window of 0 disables the automatic follow-up fee rule.

Step 3 - Add people and set permissions

1. In **Settings -> Staff logins**, choose a role: **Receptionist**, **Doctor**, or **Pharmacist - medicines only**. 2. Enter name, email, optional phone, and a temporary password. For doctors, add consultation and follow-up fees, qualification, specialisation, and medical registration number when available. 3. Select **Create login** and share the credentials privately with that staff member.

Result: each person signs in at /login with their own email. The owner can edit or deactivate a staff login later. Doctor seats may depend on the subscription plan. Staff cannot open the owner's Settings page; the owner can reset a staff password there.

Step 4 - Set OPD hours and the public listing

1. In **Settings -> OPD hours**, add each doctor's weekday sitting, start and end time, and slot length. More than one sitting can be added for a day. 2. Select **Save hours**. Fix overlapping sittings or a sitting that ends before it starts if NABZ reports an error. 3. In **Settings -> Public listing**, confirm **List this clinic for patients** and fill the doctor shown on the listing, specialization, services, and About text. Clinic timings are derived from OPD hours.

Result: patients can find a listed clinic by state, then city, and book within configured OPD hours. The offered times are nominal appointment times; more than one patient may be booked at the same time, and the token/queue manages order. If a doctor has no published OPD hours, the patient portal asks patients to call the clinic. Clinic staff can make an intentional outside-hours booking using the override control.

Step 5 - Set prices and optional messaging

1. In **Settings -> Price list**, review the starting services and edit or add each service's rate and GST percentage. These become **Quick add** choices on a bill. 2. In **Settings -> WhatsApp**, decide whether to queue appointment confirmations, reminders, prescriptions, payment receipts, and follow-up recalls. Set the reminder lead time. 3. If the clinic wants the optional location check for patient arrival, configure **Clinic location** and its radius.

Result: the clinic is ready for registration, booking, billing, and follow-up. Without a configured WhatsApp Business API, messages wait on the WhatsApp page for a staff member to open and send manually.

3. Register or find a patient

Front desk route

1. Open **Patients** and search by name, phone, or UHID before adding a new file. 2. If no suitable file exists, select **Register patient**. 3. Enter full name and phone. Add gender, age or date of birth, blood group, city/village, address, allergies, chronic conditions, and notes when known. 4. Save the patient. NABZ assigns a clinic UHID and opens the patient record.

Result: the clinic has a searchable patient file. The patient record shows visits, appointments, bills, and other clinic history. Registering a clinic file at the desk does not by itself give the patient a portal login.

Patient self-service route

1. Open the patient signup at /p/signup. 2. Choose **State -> City -> Clinic**. Within a city, search by clinic, doctor, or specialization. 3. Enter full name, mobile number, email, a password of at least eight characters, and optional personal details. 4. Select **Create account & join clinic**.

Result: one patient account can join more than one listed clinic. Each clinic has a separate file number and records. The patient switches the active clinic before viewing its appointments, consultations, or bills. There is no country selector or distance-based nearby search in the current finder.

4. Book a visit

Scheduled appointment created by the clinic

1. Open **Appointments** and use **Book for later**. 2. Search and select the patient, choose the doctor and date, select an offered time or enter a time where the form allows it, and add an optional reason. 3. Select **Book & issue token**.

Result: the appointment appears in that day's list as **BOOKED** with a token. Use the date filter and **Go** to view another day. Use **Move** for a non-completed appointment when the clinic needs to reschedule it. No separate approve/reject step is shown for a patient booking.

Walk-in created by the clinic

1. Open **Today's queue -> Walk-in**. 2. Choose an existing patient or register the person first, choose **Seeing**, and enter an optional reason. 3. Select **Add to queue**.

Result: a token is issued for now and the person enters **Waiting** as ARRIVED. No future date or time is required.

Patient-booked appointment

1. After joining the clinic, open patient **Appointments**. 2. Choose a doctor, date, offered time, and optional reason; select **Confirm booking**.

Result: the page says the appointment is booked and the clinic can see it. The appointment is BOOKED immediately. The portal allows one active appointment with the same doctor on the same day; cancel the earlier booking before choosing a different time. A patient cannot move an appointment in the portal; the clinic can use **Move** or the patient can cancel a BOOKED visit and book again.

5. Bring the patient into the queue

1. A patient with a BOOKED appointment may press **I have reached** on their Appointments page on the appointment day. With a clinic location set, the page can check in automatically while it remains open when the phone is near the clinic, even if the patient arrives early. Without a usable location, the button works from 60 minutes before the booked time onward on that day. 2. A receptionist can select **Mark arrived** on the clinic Appointments page or Today's queue. 3. Today's queue shows **In consult**, **Waiting**, **Not arrived**, and a **Finished today** section. The receptionist may mark **No show**, press **Not here yet** to move an ARRIVED patient back to **Not arrived**, or correct certain mistakes with **Put back in queue**.

Result: the appointment moves to ARRIVED and appears in **Waiting**. A patient-arrival signal can be reversed by staff if the patient is not actually there. The portal shows the patient's current queue position for today's appointment.

6. Record the consultation and prescription

1. An owner or doctor chooses **Start consult** beside an ARRIVED patient. The visit becomes IN CONSULT. **Resume** returns to the same consultation if it was already started. 2. Review the patient's record and the last visits shown beside the consultation. 3. Record vitals where relevant: blood pressure, pulse, oxygen saturation, temperature, weight, height, and blood sugar. 4. Complete **Complaints**, **Examination findings**, **Diagnosis**, **Investigations advised**, **Advice**, and an optional follow-up date. 5. Under **Prescription**, add medicines. Each line can hold medicine, dosage, days, quantity in its configured unit, timing, and instructions. A clinic medicine can be selected from the list; free text can also be entered. 6. Select **Save consultation**. If you edit after saving, select **Save changes** before printing or finishing. 7. Use **Print Rx** for a saved prescription. Select **Finish & bill** to complete the visit.

Result: the clinical record and prescription are stored in this clinic's history. Finishing creates a bill from the doctor's consultation or follow-up fee, marks the appointment COMPLETED, and opens that bill. Only owner and doctor roles can start and save consultations. A receptionist cannot write clinical notes.

7. Dispense medicine, finish the bill, and take payment

Optional medicine counter

1. In **Medicines**, maintain the medicine list, suppliers, purchases, stock batches, and expiry dates. 2. The **Counter** shows today's prescriptions waiting for stock. Dispense only clinic-listed medicines with a quantity. NABZ deducts from eligible batches and records who moved stock. 3. If a bill already exists, dispensed medicines are added to it. If dispensing happened first, **Finish & bill** includes what actually left stock.

Result: stock changes are visible in the medicine detail and **Activity** ledger. Free-text medicines that are not linked to clinic stock cannot be dispensed through this workflow.

Bill and payment

1. Open the bill created by **Finish & bill**, or use **Billing -> Raise a bill** for a charge that is not tied to a consultation. 2. Add or edit lines with description, quantity, rate, and GST percentage. Use **Quick add** for services. Add discount and notes if needed. 3. Leave **Collect payment now** on when receiving money. Enter amount, mode (cash, UPI, card, online, or other), and reference if applicable. 4. Save the bill and payment, then use the print view for a receipt.

Result: the bill shows PAID, PARTIAL, or UNPAID according to the recorded amount. The patient portal's Billing tab shows the clinic's bills, payments, and outstanding balance, but it does not present a patient payment checkout for these bills. The clinic's **Plan & payment** is a separate owner-only subscription area.

8. Close the loop

1. A doctor sets a follow-up date in the consultation when another visit is needed. 2. **Appointments** shows a **Follow-ups to chase** list. **WhatsApp -> Queue follow-up recalls** can queue messages for patients who have not returned. Staff send queued messages manually unless an API is configured. 3. The patient opens **Consultations** to read past notes and prescriptions and **Billing** to read bills for the active clinic. 4. The owner opens **Reports**, selects Last 7, 30, or 90 days, and reviews daily collection, daily footfall, payment modes, diagnoses, doctor volume, billed amounts, and new patients.

Result: each clinic retains its own history. The patient can switch to another joined clinic without mixing one clinic's records with another's.

9. Patient journey in one view

Patient step	What the patient does	What the clinic sees
Find	Select state, city, then a listed clinic	Listing is controlled by the owner.
Join	Create a portal account or join another clinic	A clinic-specific patient file is linked.
Book	Choose doctor, date, offered time; confirm	BOOKED appointment and token appear immediately.
Arrive	Use I have reached when available, or speak to the desk	ARRIVED patient moves to Waiting.
Be seen	Wait for the clinic to call the token	Doctor starts and saves the consultation.
Review	Open Consultations and Billing	Notes, prescriptions, bill and payments remain with that clinic.
Return	Book another visit or respond to a recall	Follow-up visit appears in the clinic workflow.

10. Daily operating checklist

Opening

- Owner/front desk: confirm staff logins, clinic contact details, today's doctor hours, and price list.
- Front desk: open Dashboard and Today's queue; check today's bookings and follow-ups to chase.
- Pharmacy counter: check low stock, expiring batches, and purchase entries before dispensing.

During the day

- Search before registering a patient to avoid duplicate clinic files.
- Put walk-ins directly into the queue; use Appointments for later times.
- Verify arrival, call patients by token, and let a doctor save before printing or billing.
- Collect money against the correct bill; check the remaining due before entering a second payment.

Closing

- Reconcile Billing's collected and outstanding totals with payments recorded today.
- Check WhatsApp messages waiting to send and resolve failed items.
- Owner: review Reports and staff/stock activity as needed.

11. Boundaries to explain during training

- There is no doctor self-registration into an existing clinic and no single owner login with a clinic switcher. Owners create clinic accounts separately; patient accounts can join and switch clinics.
- Patient bookings are immediately BOOKED. NABZ does not expose an approval/rejection queue for those bookings.
- Patient self-rescheduling, patient password recovery, patient notification preferences, holiday calendars, country/nearby clinic search, and clinic logo upload are not exposed in this application version.
- Settings and Reports are owner-only. Staff doctors and receptionists cannot access the owner's profile/password form; the owner can edit or reset staff logins.
- Start and save consultation actions enforce owner/doctor roles, but the current existing-consultation screen can expose **Finish & bill** to a receptionist and its completion action lacks the same role check. Keep this step doctor-led in clinic procedure and fix the permission gap in the product.
- The current patient portal displays records and bills but does not take payment for a clinic invoice.

Editorial verification note

This workflow follows the checked-in NABZ source and local development version available on 3 November 2026. The public deployment was not reachable from this workspace, and authenticated screen captures were unavailable. Confirm the deployment version before external publication. Recommendations and unavailable functions are kept separate from operating steps.