

Runbook: Clinic admin

Who this is for

This guide is for the people who **run a clinic or hospital** on thehealint:

- **Clinic admin** and **Hospital admin**. The two are the same job with a different label. You can see and change everything, and you are the only people who can add or remove staff.
- **Facility manager**. You run the day-to-day operation but don't manage staff. See **If you are a facility manager** below.

It covers setting up a new organization, getting it verified and published so patients can find you, and then the jobs you'll come back to: branches, departments, staff and doctors, doctors' weekly hours and time off, and the oversight pages (notification delivery, covering access, analytics and security).

You work in **ProviderOS**, in a web browser.

What you'll see

After you sign in, ProviderOS opens on **Today**. The menu along the top has:

Menu item	What it's for
Today	Your organization's status (verified, published) and today's numbers across every branch
Reception	Today's queue and walk-ins. The number beside it is how many patients are waiting
Calendar	A day's bookings, one column per doctor
Patients	Look up a patient and their history
Billing	Invoices, payments and discounts
Fulfilment	Your in-house Pharmacy and Diagnostics
Analytics	How the clinic is running (on the Growth plan)
Settings	Staff, branches, departments, practitioners, weekly availability, documents, notifications, security, covering access

Your organization's name is on the grey bar under the menu. Your initials are at the top right: click them for **Security** or **Sign out**.

thehealint
PROVIDEROS
Today
Reception 1
Calendar
Patients
Billing
Fulfilment
Analytics
Settings
DA

Aarogya Family Clinic

TODAY

Aarogya Family Clinic

The organization's daily dashboard — verification and publishing status, plus today's walk-ins, no-shows and collections across every branch. For a day's full appointment list, use Calendar.

Unpublish

Verified

Published to marketplace
Aarogya Family Clinic Pvt Ltd - Hospital

TODAY AT A GLANCE

APPOINTMENTS 2	WALK-INS 0	NO-SHOWS 0	AVG WAIT 10 min
COMPLETED 0	BILLED ₹0.00	COLLECTED ₹0.00	OUTSTANDING ₹0.00

VERIFICATION HISTORY

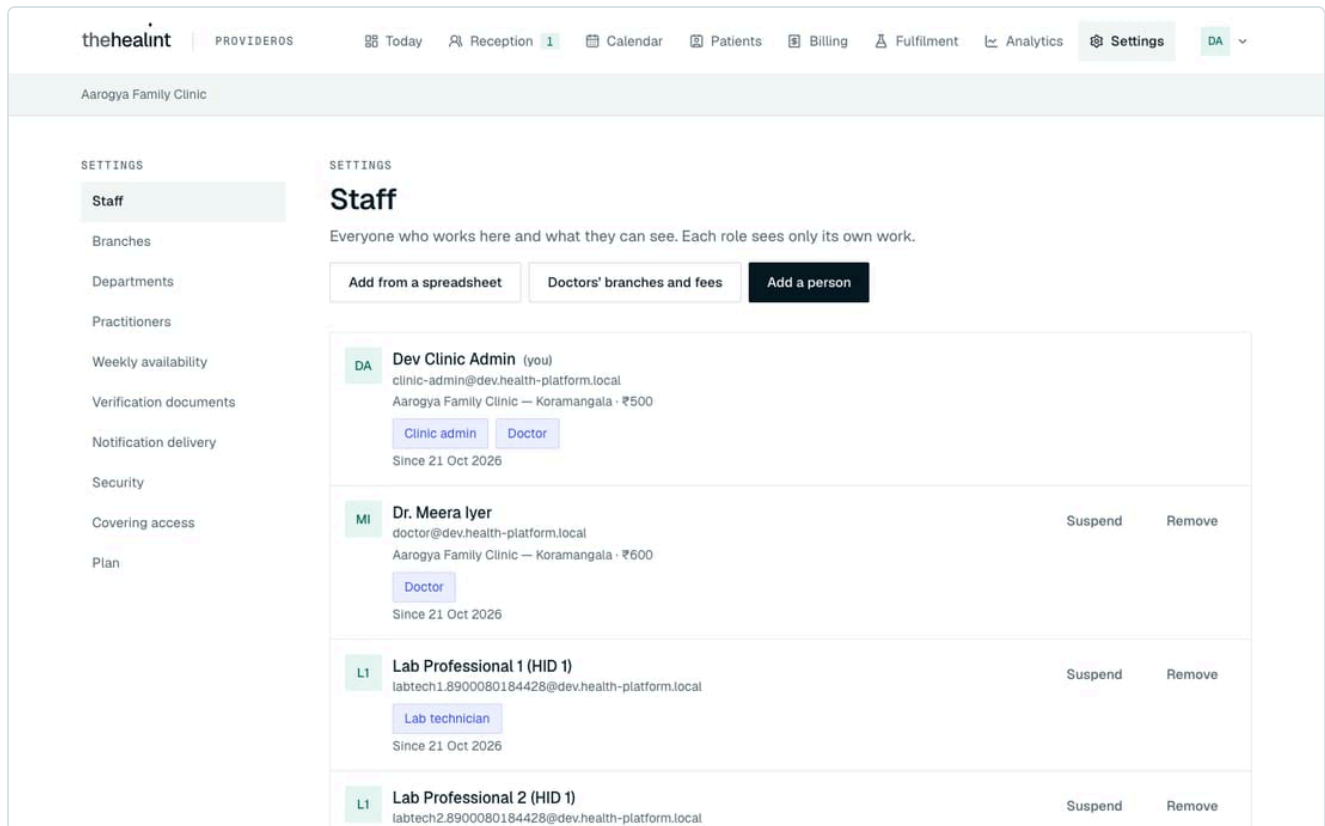
No verification events yet

Every status change a platform admin makes to this organization is recorded here.

Today for Aarogya Family Clinic: the full menu, the **Verified** pill and "Published to marketplace", the **Unpublish** button, and the eight "Today at a glance" tiles.

Reception, Calendar, Patients and Billing work exactly as they do for the front desk. They're explained in [03-front-desk.md](#). Pharmacy and Diagnostics are explained in [06-pharmacy-and-lab.md](#).

Settings has its own menu down the left-hand side. **Staff** comes first.



*Settings → Staff at Aarogya: the Settings menu on the left, everyone who works here with their role pills, and **Add a person** at the top right.*

Before you start

If someone invited you

If your clinic is already on thehealint, another admin adds you under **Settings** → **Staff** and you get an email:

1. Open the email "**You've been added to your clinic on thehealint**" and click **Set your password and sign in to ProviderOS**.
2. On **Set your password**, type a **New password** (at least 8 characters) and type it again in **Confirm password**.
3. Click **Save and continue**. ProviderOS opens on **Today**.

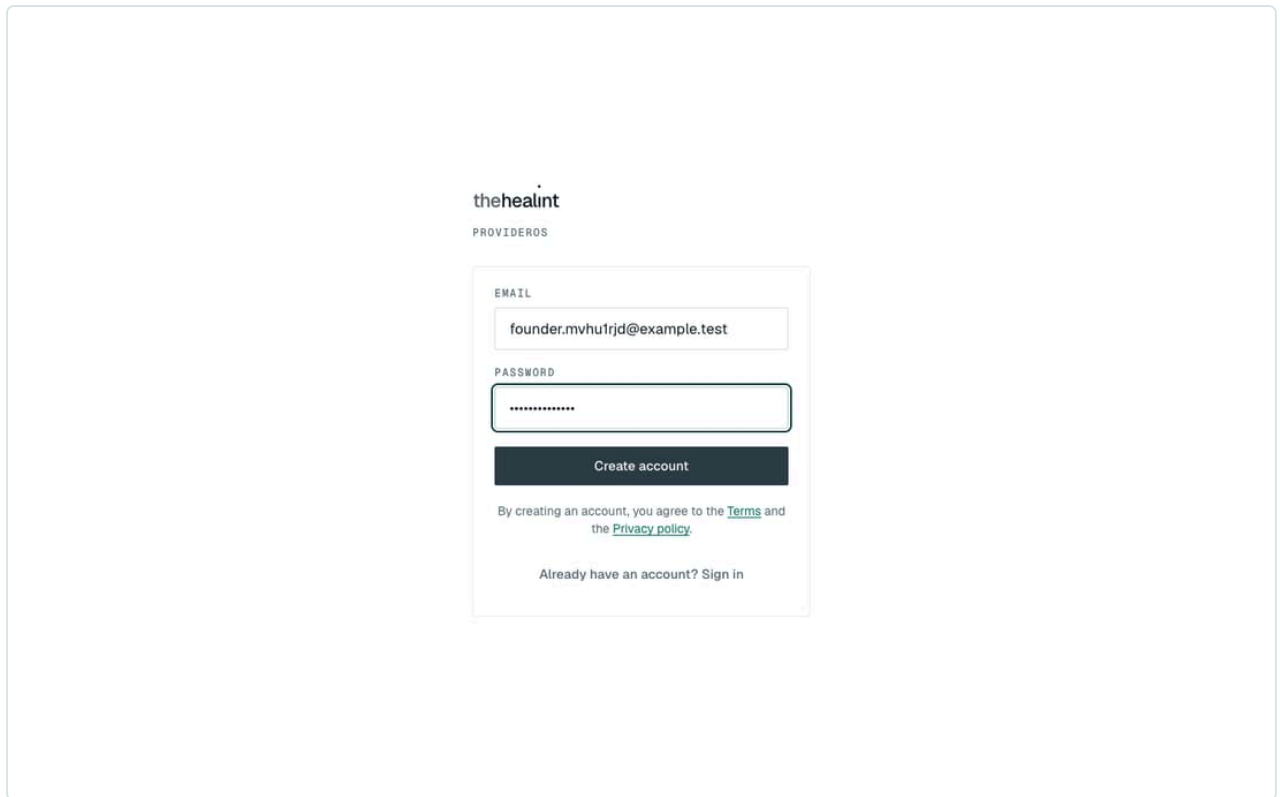
The email and the Set your password page are shown in **How to add a receptionist** below.

If it doesn't work: "This link has expired" means the link was already used or is too old. Ask the admin who added you to click **Resend invitation**, or click **Sign in** if you've already set a password.

If you're setting up a new organization

You only do this once, when your clinic or hospital first joins thehealint. Whoever does it becomes its first admin.

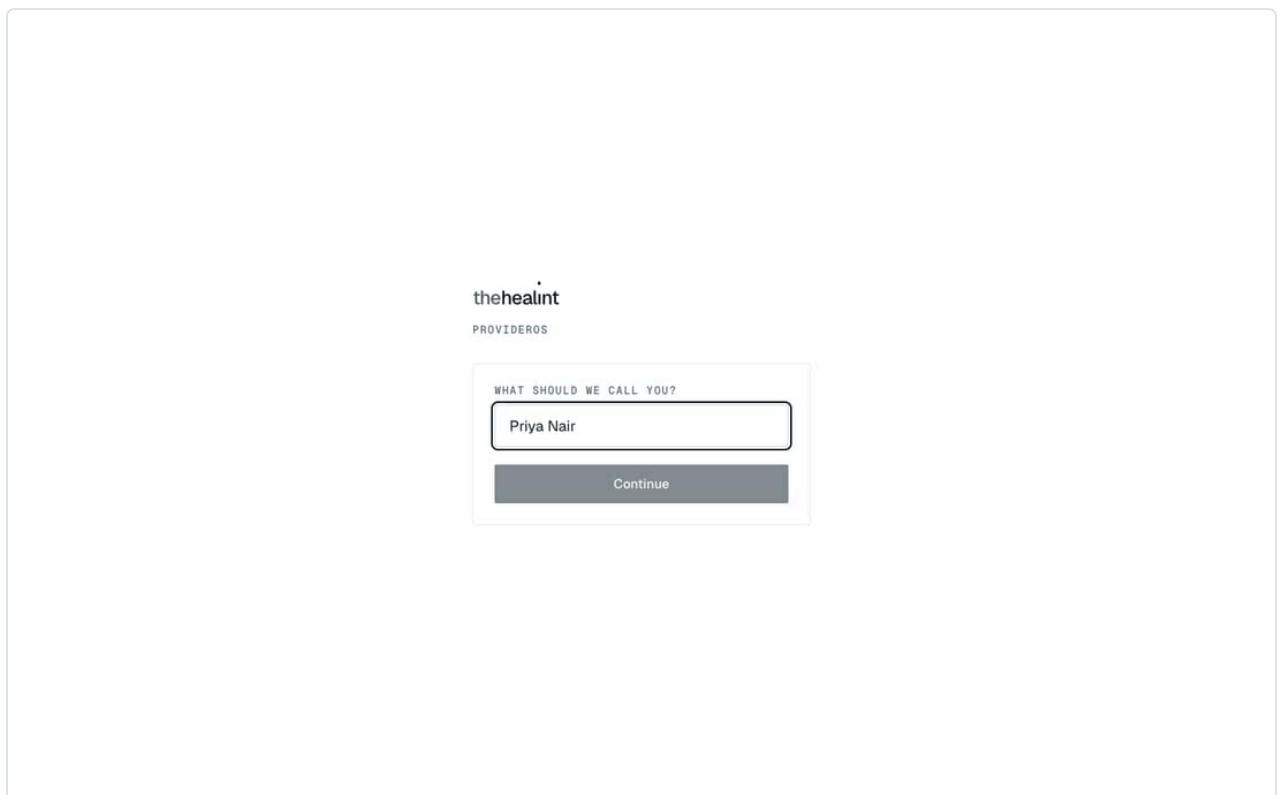
1. Go to ProviderOS and click **Setting up a new clinic? Create an account.**
2. Enter your **Email** and a **Password** (at least 8 characters), then click **Create account.**



The screenshot shows the 'thehealint PROVIDEROS' login page. The 'Create account' tab is selected. The form contains an 'EMAIL' field with the text 'founder.mvhu1rjd@example.test', a 'PASSWORD' field with masked characters, a 'Create account' button, and a link to 'Sign in' for existing users. A disclaimer about terms and privacy policy is also present.

The sign-in card switched to **Create account**. "Already have an account? Sign in" takes you back.

3. Under **What should we call you?**, type your full name and click **Continue.**



The screenshot shows the 'thehealint PROVIDEROS' login page with the 'Create account' tab selected. The 'WHAT SHOULD WE CALL YOU?' field contains the name 'Priya Nair'. A 'Continue' button is visible at the bottom of the form.

Your name is how colleagues will see you on the Staff list.

4. On **Set up your organization**, fill in:

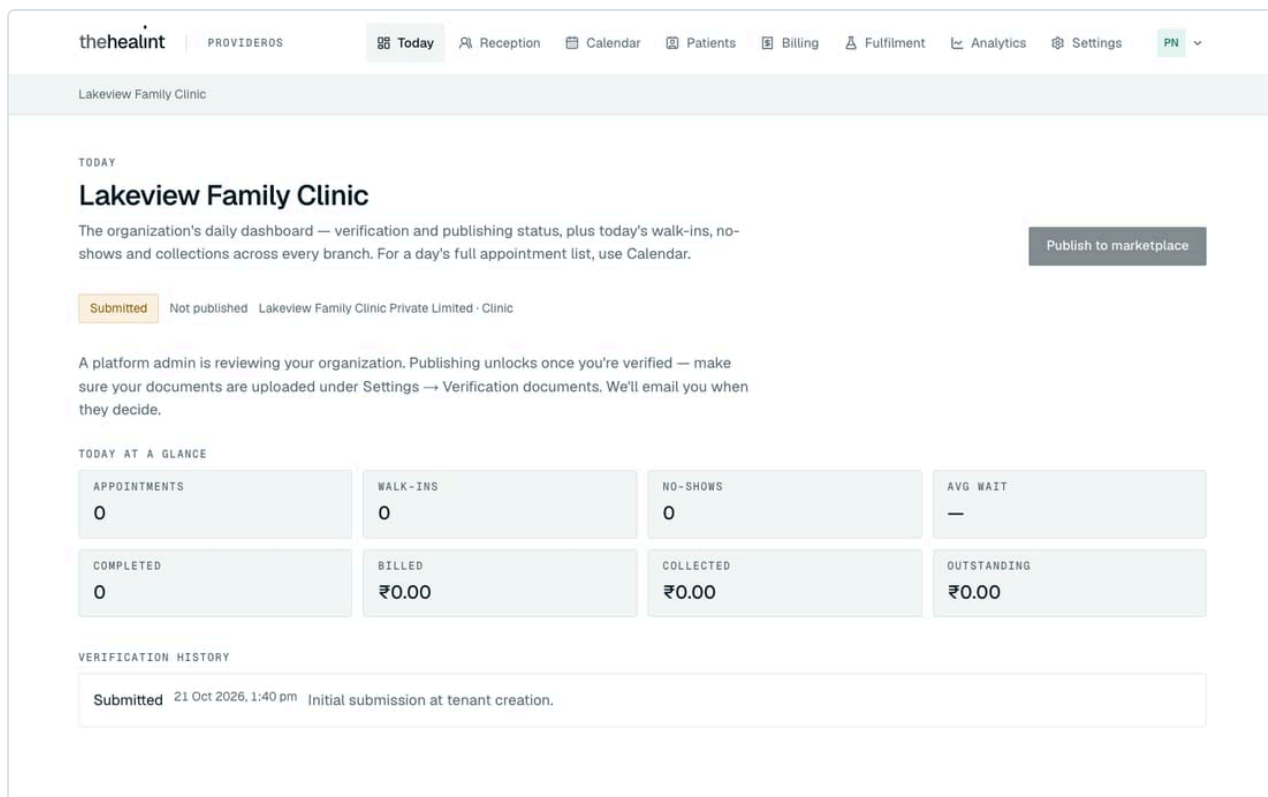
- **Organization type:** Individual doctor, Clinic, Hospital, Chain, Independent pharmacy or Diagnostic laboratory. Choose **Clinic** or **Individual doctor** to become a Clinic admin, or **Hospital** or **Chain** to become a Hospital admin. (A pharmacy or lab owner follows [06-pharmacy-and-lab.md](#) instead.)
- **Legal name:** as registered with the medical council or ROC.
- **Display name:** the name patients see.
- **Slug:** your web address on the marketplace, for example `sunrise-clinic-hsr`. Lower-case, no spaces.

5. Click **Create organization**.

The screenshot shows the 'Set up your organization' form within the ProviderOS interface. The header includes 'thehealint' and 'PROVIDEROS' on the left, and a 'PN' dropdown on the right. The main heading is 'STEP 1 OF ONBOARDING Set up your organization'. Below this, a sub-header states: 'You become its founding admin automatically. Everything else — branches, practitioners, schedules — hangs off this.' The form contains four input fields: 'ORGANIZATION TYPE' (a dropdown menu with 'Clinic' selected), 'LEGAL NAME' (with the subtext 'As registered with the medical council / ROC' and the value 'Lakeview Family Clinic Private Limited'), 'DISPLAY NAME' (with the subtext 'Shown to patients' and the value 'Lakeview Family Clinic'), and 'SLUG' (with the subtext 'Your address on the marketplace — e.g. sunrise-clinic-hsr' and the value 'lakeview-family-clinic-mvhu1rjd'). A 'Create organization' button is at the bottom of the form.

Step 1 of onboarding. There is no step 2: everything else is set up from Settings afterwards.

6. ProviderOS opens on **Today**, with the full menu now at the top. This is a good moment to turn on two-factor sign-in (see **How to turn on two-factor sign-in**).



Straight after Create organization: Today, with the full menu, a "Submitted" pill and Publish to marketplace greyed out until a platform admin verifies you.

If it doesn't work:

- "Create an account with email for now. Phone signup needs SMS verification." You typed a phone number. Use an email address.
- "Choose a password with at least 8 characters." Make the password longer.
- "Could not create your organization." (or a message about the slug) usually means someone already uses that slug. Try a different one.

What to set up next, in order: verification documents → branch → departments (optional) → staff and doctors → doctors' weekly hours → publish once you're verified.

Signing in every day

Enter your email and password and click **Sign in**. If you've turned on two-factor sign-in, ProviderOS then asks for an **Authenticator code**: type the 6-digit code from your authenticator app and click **Verify**.

How to get verified

Patients can't find you until a thehealint reviewer has checked your organization and marked it **Verified**. Your organization is sent for review automatically when you create it. There's no separate "submit" button. What the reviewer needs from you is at least one document.

1. Go to **Settings** → **Verification documents**.

thehealint PROVIDEROS Today Reception Calendar Patients Billing Fulfilment Analytics Settings PN

Lakeview Family Clinic

SETTINGS

Staff

Branches

Departments

Practitioners

Weekly availability

Verification documents

Notification delivery

Security

Covering access

Plan

SETTINGS

Verification documents

A platform admin needs at least one of these to mark the organization verified — which is what unlocks publishing to the marketplace.

UPLOADED

Nothing uploaded yet

Until one is here, verification cannot start.

UPLOAD A DOCUMENT

DOCUMENT TYPE

Registration certificate

FILE

PDF or Image

Choose file No file chosen

Upload document

"Nothing uploaded yet — Until one is here, verification cannot start."

2. Under **Upload a document**, choose the **Document type**: Registration certificate, Medical council ID, Address proof, Identity proof or Other.
3. Under **File**, choose a PDF or an image.
4. Click **Upload document**. It appears under **Uploaded**. Click **View** to open it.

thehealint PROVIDEROS Today Reception Calendar Patients Billing Fulfilment Analytics Settings PN

Lakeview Family Clinic

SETTINGS

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Branches

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SETTINGS

Verification documents

A platform admin needs at least one of these to mark the organization verified — which is what unlocks publishing to the marketplace.

UPLOADED

Registration certificate

lakeview-registration-certificate.pdf

View

UPLOAD A DOCUMENT

DOCUMENT TYPE

Registration certificate

FILE

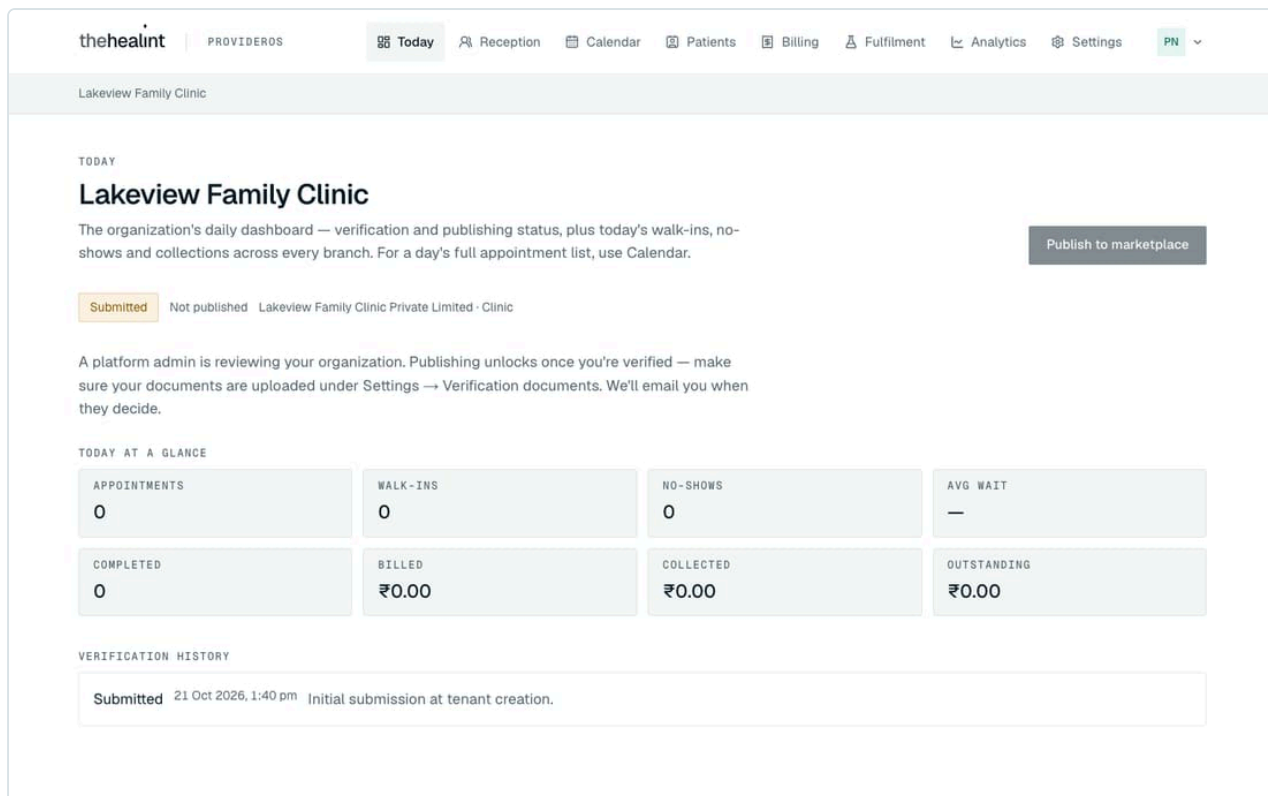
PDF or Image

Choose file lakeview-registration-certificate.pdf

Upload document

The registration certificate now listed under *Uploaded*, with **View**.

5. Wait for the reviewer. While you wait, Today shows a **Submitted** pill and "Not published", and **Publish to marketplace** is greyed out.



thehealint PROVIDEROS Today Reception Calendar Patients Billing Fulfilment Analytics Settings PN

Lakeview Family Clinic

TODAY

Lakeview Family Clinic

The organization's daily dashboard — verification and publishing status, plus today's walk-ins, no-shows and collections across every branch. For a day's full appointment list, use Calendar.

Submitted Not published Lakeview Family Clinic Private Limited · Clinic

A platform admin is reviewing your organization. Publishing unlocks once you're verified — make sure your documents are uploaded under Settings → Verification documents. We'll email you when they decide.

TODAY AT A GLANCE

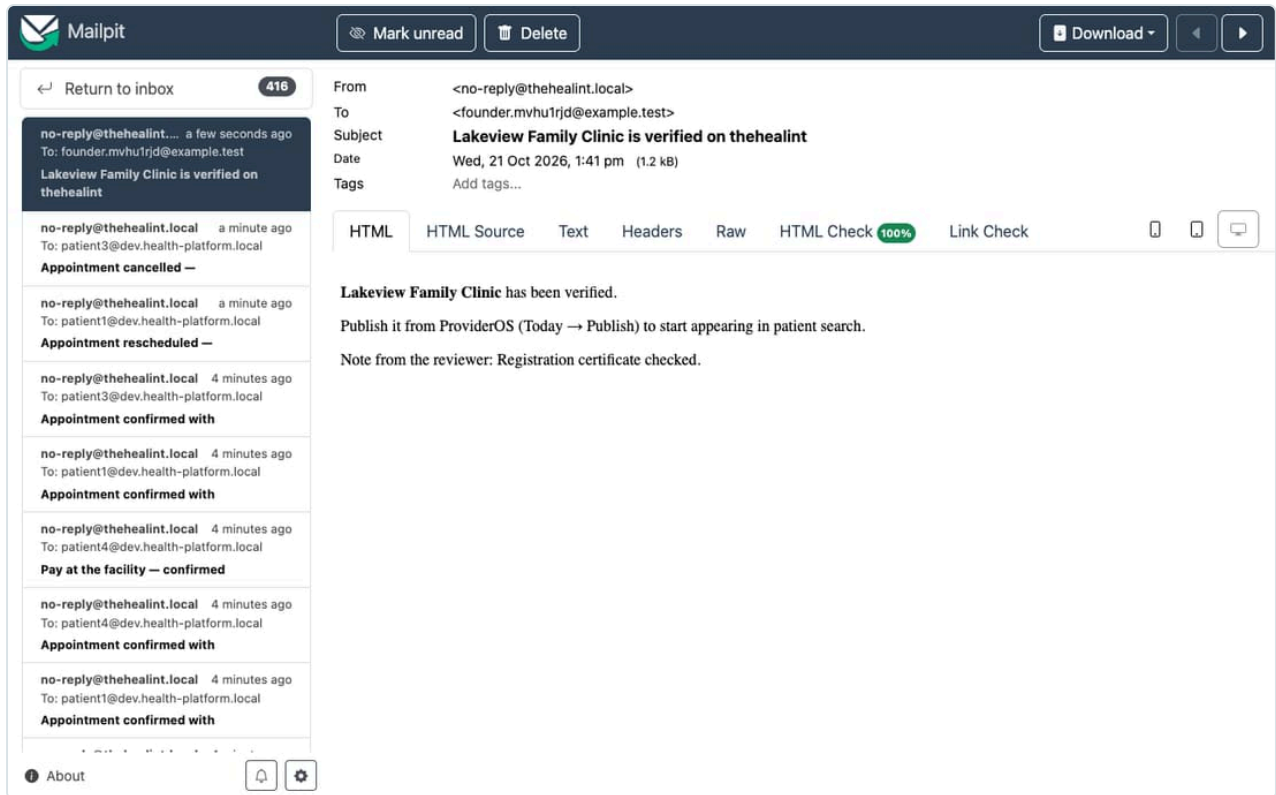
APPOINTMENTS 0	WALK-INS 0	NO-SHOWS 0	AVG WAIT —
COMPLETED 0	BILLED ₹0.00	COLLECTED ₹0.00	OUTSTANDING ₹0.00

VERIFICATION HISTORY

Submitted	21 Oct 2026, 1:40 pm	Initial submission at tenant creation.
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A new organization on Today: **Submitted**, "Not published", a greyed-out **Publish to marketplace** and the note "Publishing unlocks once a platform admin marks this organization verified". Verification history shows "— → SUBMITTED · Initial submission at tenant creation."

6. When the reviewer approves you, every clinic and hospital admin gets an email: "**Your clinic is verified on thehealint**", with any note from the reviewer.



The approval email: "Publish it from ProviderOS (Today → Publish) to start appearing in patient search", and the reviewer's note.

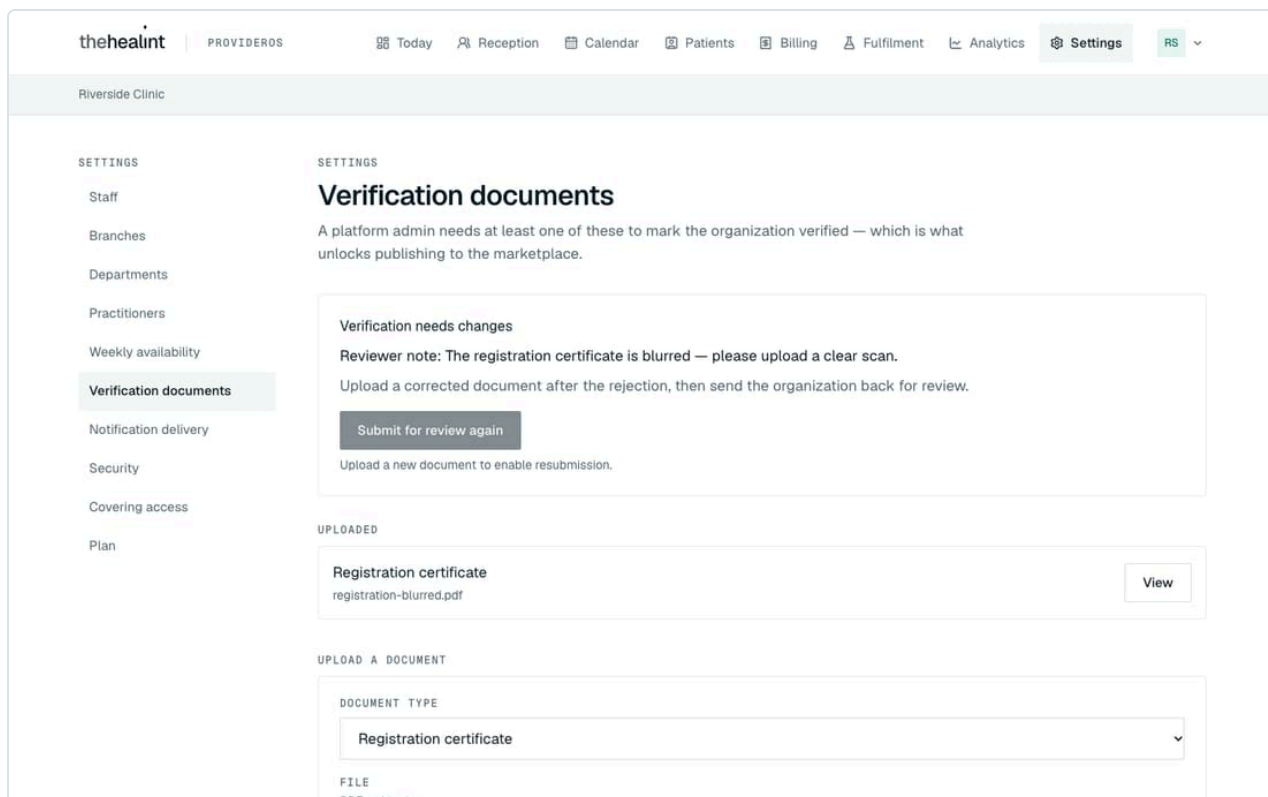
If it doesn't work:

- Documents can't be deleted or replaced. A new upload is added next to the old ones.
- If the reviewer asked for changes, follow the next section.

How to fix a rejected application and send it back

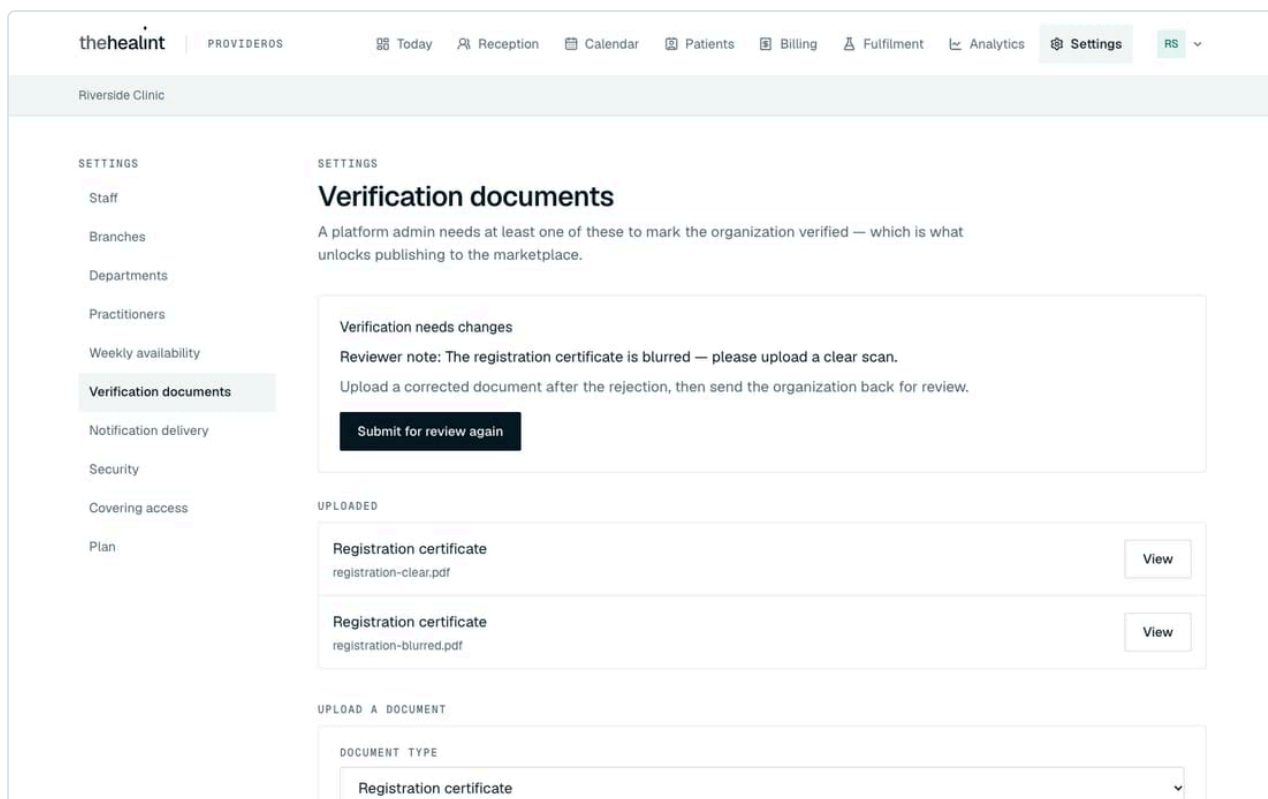
If the reviewer asks for changes, every clinic and hospital admin gets an email "**Your clinic: verification needs changes**" saying what to fix. You don't need to contact support — you send it back yourself.

1. Open **Settings** → **Verification documents**. A **Verification needs changes** card at the top repeats the reviewer's note. **Submit for review again** is greyed out until you upload something new.



The reviewer's note ("The registration certificate is blurred — please upload a clear scan"), the greyed-out button, and the document they rejected under Uploaded.

2. Under **Upload a document**, choose the type, pick the corrected file and click **Upload document**. **Submit for review again** turns dark.



After the corrected upload: both files are listed and Submit for review again is ready.

3. Click **Submit for review again**. The card closes and you see "Submitted for review again. The organization is back in the platform admin inbox." Your status is **Submitted** again, and you'll get an email when the reviewer decides.

The screenshot shows the 'thehealint' ProviderOS interface. The top navigation bar includes 'Today', 'Reception', 'Calendar', 'Patients', 'Billing', 'Fulfillment', 'Analytics', 'Settings', and a user profile 'RS'. The left sidebar lists settings categories: Staff, Branches, Departments, Practitioners, Weekly availability, Verification documents (highlighted), Notification delivery, Security, Covering access, and Plan. The main content area is titled 'Verification documents' and includes a message: 'Submitted for review again. The organization is back in the platform admin inbox.' Below this, there is an 'UPLOADED' section with two entries: 'Registration certificate' (registration-clear.pdf) and 'Registration certificate' (registration-blurred.pdf), each with a 'View' button. At the bottom, there is an 'UPLOAD A DOCUMENT' section with a 'DOCUMENT TYPE' dropdown set to 'Registration certificate', a 'FILE' section with a 'Choose file' button and 'No file chosen' text, and an 'Upload document' button.

Sent back for review: the confirmation, with the corrected and the original documents both on file.

If it doesn't work:

- **The button stays grey.** Only a document uploaded *after* the rejection counts. Upload the corrected file first.
- **"Only a rejected organization can be submitted for review again."** You (or another admin) already resubmitted. Nothing more to do — wait for the reviewer.

How to publish (and unpublish)

Publishing puts your clinic into patient search. You can do it once you're **Verified**.

1. Go to **Today**. The pill now reads **Verified**, and a green card says **"You're verified — publish to start taking bookings"**.

thehealint
PROVIDEROS
Today
Reception
Calendar
Patients
Billing
Fulfilment
Analytics
Settings
RS

Riverside Clinic

TODAY

Riverside Clinic

The organization's daily dashboard — verification and publishing status, plus today's walk-ins, no-shows and collections across every branch. For a day's full appointment list, use Calendar.

Verified

Not published
Riverside Clinic LLP · Clinic

You're verified — publish to start taking bookings
Publishing puts your branches and doctors into patient search. You can unpublish at any time.

Publish now

TODAY AT A GLANCE

APPOINTMENTS 0	WALK-INS 0	NO-SHOWS 0	AVG WAIT —
COMPLETED 0	BILLED ₹0.00	COLLECTED ₹0.00	OUTSTANDING ₹0.00

VERIFICATION HISTORY

Submitted → Verified	21 Oct 2026, 1:48 pm	Clear scan received — thank you.
Rejected → Submitted	21 Oct 2026, 1:48 pm	Resubmitted after corrected documents were uploaded.

Verified but not published yet: the green card with **Publish now**, and the verification history ("Submitted → Verified") with the reviewer's note.

- Click **Publish now** on the card (or **Publish to marketplace** at the top — they do the same thing). The line under the name changes to "Published to marketplace" and the button becomes **Unpublish**.

thehealint
PROVIDEROS
Today
Reception
Calendar
Patients
Billing
Fulfilment
Analytics
Settings
PN

Lakeview Family Clinic

TODAY

Lakeview Family Clinic

The organization's daily dashboard — verification and publishing status, plus today's walk-ins, no-shows and collections across every branch. For a day's full appointment list, use Calendar.

Verified

Published to marketplace
Lakeview Family Clinic Private Limited · Clinic

Unpublish

TODAY AT A GLANCE

APPOINTMENTS 0	WALK-INS 0	NO-SHOWS 0	AVG WAIT —
COMPLETED 0	BILLED ₹0.00	COLLECTED ₹0.00	OUTSTANDING ₹0.00

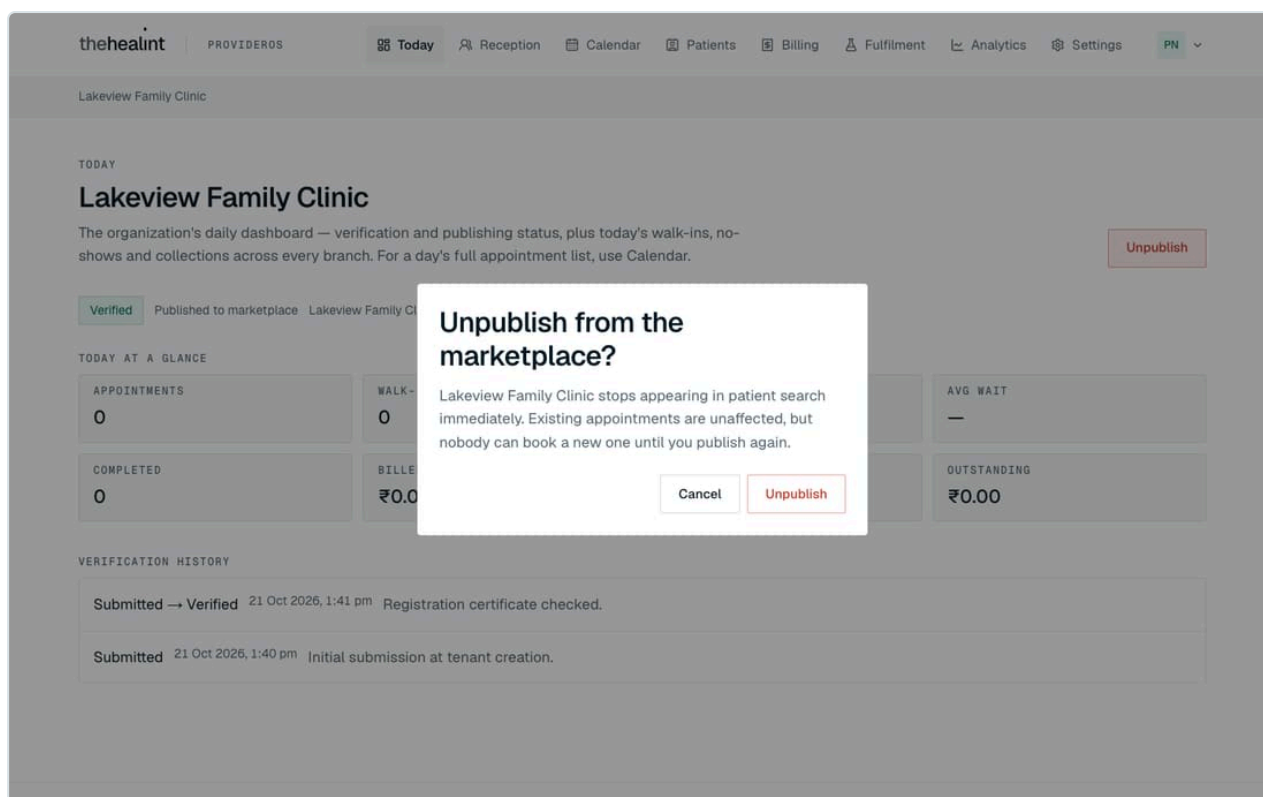
VERIFICATION HISTORY

Submitted → Verified	21 Oct 2026, 1:41 pm	Registration certificate checked.
Submitted	21 Oct 2026, 1:40 pm	Initial submission at tenant creation.

Published to marketplace. Patients can now find and book you.

To take your clinic out of search:

1. Click **Unpublish** on Today.
2. Read the box and click **Unpublish** again.



"Unpublish from the marketplace?" Existing appointments are unaffected, but nobody can book a new one until you publish again.

If it doesn't work: if **Publish to marketplace** stays greyed out, you aren't verified yet. Check that a document is uploaded and wait for the reviewer's email.

How to read Today

Today is your daily dashboard. It counts across **every branch**, whatever the branch selector says.

- The **pill** shows where verification stands: **Submitted**, **Under review**, **Verified** or **Rejected**. Next to it: "Published to marketplace" or "Not published", and your legal name and type.
- **Today at a glance:** **Appointments**, **Walk-ins**, **No-shows**, **Avg wait**, **Completed**, **Billed**, **Collected** and **Outstanding** for today.
- **Verification history:** every change the reviewer has made, with the date and their note. It shows the raw status words, for example "SUBMITTED → VERIFIED".

For the full list of today's bookings, use **Calendar** ([03-front-desk.md](#)).

How to add a branch

A branch is a place where you see patients. You need at least one before you can add doctors or take bookings. Patients search by distance, so the map pin matters as much as the address.

1. Go to **Settings** → **Branches**.
2. Under **Add a branch**, fill in **Branch name**, **Address line 1**, **Locality**, **City**, **State** and **Pincode**.
3. Put the pin on the map. Either:
 - type the address in **Search an address to jump the map there...** and click **Find**, or
 - click the map where the branch is.

Drag the pin to fine-tune it. Under the map you'll see "Pin confirmed at ...".

4. Click **Add branch**.

BRANCH NAME

Lakeview Family Clinic — Indiranagar

ADDRESS LINE 1

12, 100 Feet Road

LOCALITY

Indiranagar

CITY

Bengaluru

STATE

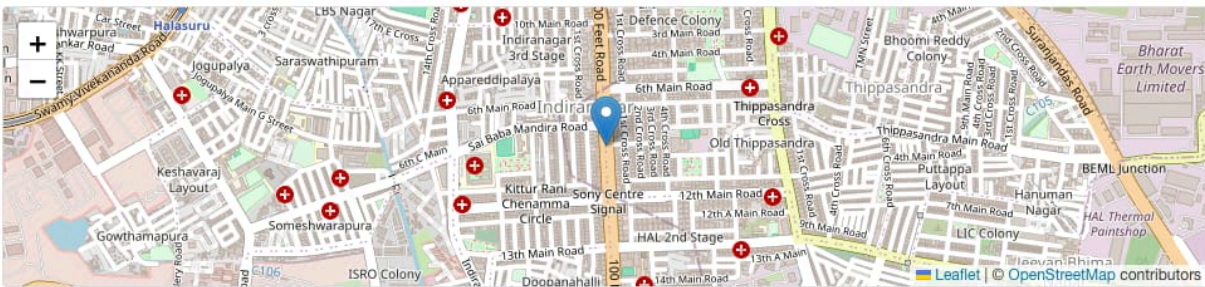
Karnataka

PINCODE

560038

100 Feet Road, Indiranagar, Bengaluru

Find



Pin confirmed at 12.97194, 77.64115 — drag it to adjust.

Add branch

The address filled in, the pin on 100 Feet Road, and "Pin confirmed at 12.97194, 77.64115 — drag it to adjust." **Add branch** only works once a pin is placed.

The branch appears under **Existing branches**.

thehealint PROVIDEROS Today Reception Calendar Patients Billing Fulfilment Analytics Settings PN

Lakeview Family Clinic

SETTINGS

Staff

Branches

Departments

Practitioners

Weekly availability

Verification documents

Notification delivery

Security

Covering access

Plan

SETTINGS

Branches

Every physical location you see patients at. Patients search by distance, so the pin matters as much as the address.

Add from a spreadsheet

EXISTING BRANCHES

Lakeview Family Clinic — Indiranagar
Indiranagar, Bengaluru

ADD A BRANCH

BRANCH NAME

ADDRESS LINE 1

LOCALITY CITY

STATE PINCODE

Lakeview Family Clinic — Indiranagar under Existing branches.

If it doesn't work:

- "Confirm your location on the map before adding this branch." Place the pin first.
- "No match found — place the pin manually instead." The address search didn't find it. Click the map instead.
- "Your plan allows up to 1 branch(es) — upgrade to add more." The Free plan has one branch. Click **See plans** under the message to ask for a bigger plan (see **How to change your plan**).

Your plan allows up to 1 branch(es) — upgrade to add more.

See plans

*Trying to add a second branch on the Free plan: the message, and **See plans**.*

- A branch can't be edited or removed from this page. Ask thehealint support if an address or pin is wrong.

How to add a department

Departments are optional. Add them only if you want doctors, and the Analytics split, grouped by unit (Cardiology, Paediatrics, Emergency...).

1. Go to **Settings** → **Departments**. If you have more than one branch, pick the **Branch** first.

2. Under **Add a department**, type the **Department name**.
3. Leave **Marketplace specialty** on "No specialty link" unless the department really is one specialty.
4. Click **Add department**.

thehealint PROVIDEROS Today Reception Calendar Patients Billing Fulfilment Analytics Settings PN

Lakeview Family Clinic

SETTINGS

- Staff
- Branches
- Departments**
- Practitioners
- Weekly availability
- Verification documents
- Notification delivery
- Security
- Covering access
- Plan

SETTINGS

Departments

The units a branch is organised into — Cardiology, Paediatrics, Emergency. A practitioner is placed in one on their branch affiliation, and analytics splits by them.

DEPARTMENTS AT THIS BRANCH 1

General Medicine

ADD A DEPARTMENT

DEPARTMENT NAME

MARKETPLACE SPECIALTY

Optional. Only set this where the department really is one specialty — many are not, and a wrong link would misdescribe you in patient search.

No specialty link

Add department

General Medicine under "Departments at this branch", with the count beside the heading.

If it doesn't work: "No branches yet" means you need a branch first. Departments can't be renamed or removed once added.

How to add staff

Only clinic and hospital admins can do this. Each person gets an email with a link to set their password, and sees only the screens for their role.

Go to **Settings** → **Staff**. A new organization has just you on the list.

thehealint
PROVIDERS
Today
Reception
Calendar
Patients
Billing
Fulfilment
Analytics
Settings
PN

Lakeview Family Clinic

SETTINGS
Staff
Branches
Departments
Practitioners
Weekly availability
Verification documents
Notification delivery
Security
Covering access
Plan

SETTINGS
Staff

Everyone who works here and what they can see. Each role sees only its own work.

Add from a spreadsheet
Doctors' branches and fees
Add a person

PN

Priya Nair (you)
founder.mvhu1rjd@example.test

Clinic admin

Since 21 Oct 2026

© 2026 thehealint
Terms
Privacy
Cookies

AI assists care navigation. Clinicians remain responsible for medical decisions.

Your own row is marked "(you)" and has no buttons.

The **Role** you choose decides what the person sees. The form shows the same line under the Role box:

Role	What they see
Doctor	Their own queue, calendar, patients and consultations.
Receptionist	Reception, calendar, patients and billing.
Appointment manager	Reception, calendar, patients and billing.
Nurse	Today's queue.
Billing	Billing only.
Pharmacist	Pharmacy orders and their own credential.
Lab technician	Diagnostic orders and their own credential.
Pharmacy admin	The pharmacy: facility, licence and orders.
Lab admin	The lab: facility, licence and orders.
Facility manager	Every operational screen, but not staff.
Clinic admin	Everything, including staff.
Hospital admin	Everything, including staff.

How to add a receptionist (or any non-doctor)

1. Click **Add a person**.

2. Fill in **Full name** and **Email**.
3. Choose the **Role**, here **Receptionist**.
4. Click **Add and send invitation**.

ADD A PERSON

FULL NAME

Asha Rao

EMAIL

They'll get a link here to set their password.

asha.rao.mvhu1rjd@example.test

ROLE

Reception, calendar, patients and billing.

Receptionist

Add and send invitation

Cancel

The Add a person form: Full name, Email ("They'll get a link here to set their password."), Role with its hint, **Add and send invitation** and **Cancel**.

5. A message confirms "Name added — we've emailed them a link to set their password". Their row shows **Invited — hasn't signed in yet** until they set a password.

thehealint

PROVIDEROS

Today

Reception

Calendar

Patients

Billing

Fulfilment

Analytics

Settings

PN

Lakeview Family Clinic

SETTINGS

Staff

Branches

Departments

Practitioners

Weekly availability

Verification documents

Notification delivery

Security

Covering access

Plan

SETTINGS

Staff

Everyone who works here and what they can see. Each role sees only its own work.

Add from a spreadsheet

Doctors' branches and fees

Add a person

AR

Asha Rao

asha.rao.mvhu1rjd@example.test

Receptionist

Invited — hasn't signed in yet

Since 21 Oct 2026

Resend invitation

Suspend

Remove

PN

Priya Nair (you)

founder.mvhu1rjd@example.test

Clinic admin

Since 21 Oct 2026

© 2026 thehealint

Terms

Privacy

Cookies

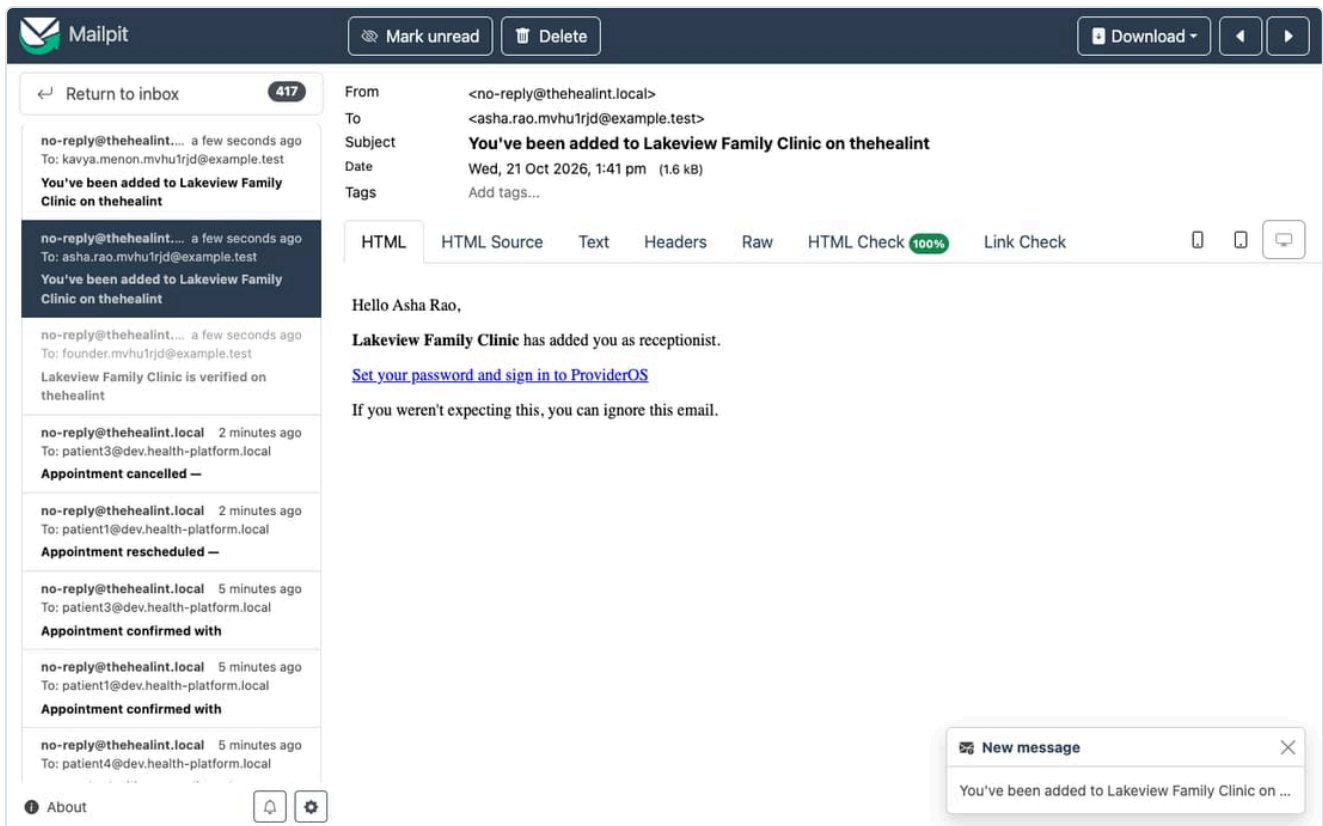
AI assists care navigation. Clinicians remain responsible for medical decisions.

Asha Rao added — we've emailed them a link to set their password

x

Asha Rao added as Receptionist, with the Invited pill and **Resend invitation**, **Suspend** and **Remove**.

What the new person gets. An email "You've been added to *your clinic* on thehealint" with a **Set your password and sign in to ProviderOS** link:



The invitation, as it arrives: "Lakeview Family Clinic has added you as receptionist."

The link opens **Set your password**. They type a new password twice and click **Save and continue**:

thehealint

PROVIDEROS

Set your password

asha.rao.mvhu1rjd@example.test

NEW PASSWORD

At least 8 characters.

CONFIRM PASSWORD

Save and continue

Set your password, with the person's email under the heading.

ProviderOS then opens on their first screen, with only the menu their role allows:

thehealint PROVIDEROS

Reception Calendar Patients Billing AR

Lakeview Family Clinic

OPERATIONS

Reception

Today's queue, updating live. Use the branch selector at the top of the page to narrow it.

Refresh

REGISTER A WALK-IN

FIND THE PATIENT

Phone, name or patient ID

Search

No account found — register a new patient

EXPECTED TODAY

Nobody is still expected today

Everyone booked for today has either arrived or been seen. A patient who books later appears here until they are checked in.

TODAY'S QUEUE

Live — updated 1:41 pm

The receptionist lands on Reception, with Reception, Calendar, Patients and Billing in the menu.

How to add a doctor

A doctor needs a few more details, because adding them also makes them bookable at a branch.

1. Click **Add a person** and choose **Doctor** as the **Role**.
2. Fill in **Full name**, **Email**, **Registration number** (their medical council registration) and **Council** (for example Karnataka Medical Council).
3. Choose a **Specialty** (optional), the **Branch** they work at, and their **Consultation fee (₹)**.
4. Click **Add and send invitation**.

ADD A PERSON

FULL NAME

Dr. Kavya Menon

EMAIL

They'll get a link here to set their password.

kavya.menon.mvhu1rjd@example.test

ROLE

Their own queue, calendar, patients and consultations.

Doctor

REGISTRATION NUMBER

Medical council registration.

KMC-48213

COUNCIL

Karnataka Medical Council

SPECIALTY

General Medicine

BRANCH

Lakeview Family Clinic — Indiranagar

CONSULTATION FEE (₹)

600

Set their weekly hours in [Weekly availability](#) once they are added.

Add and send invitation

Cancel

Asha Rao added — we've emailed them a link to set their password

The Doctor fields: Registration number, Council, Specialty, Branch and Consultation fee, with the note "Set their weekly hours in Weekly availability once they are added."

5. The doctor's row shows their branch and fee.

thehealint PROVIDEROS Today Reception Calendar Patients Billing Fulfilment Analytics Settings PN

Lakeview Family Clinic

SETTINGS

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SETTINGS

Staff

Everyone who works here and what they can see. Each role sees only its own work.

Add from a spreadsheet

Doctors' branches and fees

Add a person

AR

Asha Rao

asha.rao.mvhu1rjd@example.test

Receptionist

Invited — hasn't signed in yet

Since 21 Oct 2026

Resend invitation

Suspend

Remove

KM

Dr. Kavya Menon

kavya.menon.mvhu1rjd@example.test

Lakeview Family Clinic — Indiranagar · ₹600

Doctor

Invited — hasn't signed in yet

Since 21 Oct 2026

Resend invitation

Suspend

Remove

PN

Priya Nair (you)

founder.mvhu1rjd@example.test

Clinic admin

Since 21 Oct 2026

Dr. Kavya Menon added — we've emailed them a link to set their password

Dr. Kavya Menon listed with "Lakeview Family Clinic — Indiranagar · ₹600", the Doctor pill and Invited.

6. Patients can't book the doctor yet. Set their hours next: **How to set a doctor's weekly hours.**

If it doesn't work:

- **Add and send invitation** stays greyed out until every field it needs is filled in: a name, a real email, and for a doctor the registration number, council, branch and fee.
- "This person already has that role here." They're already on your staff with that role.
- If the email already has a thehealint account (for example as a patient), they keep their existing name and password. They can sign in to ProviderOS straight away.

How to add many people at once from a spreadsheet

If you are setting up a whole team, add everyone in one go instead of one by one.

1. Open **Settings** → **Staff** and click **Add from a spreadsheet**.

The screenshot shows the 'thehealint' interface with the 'Settings' menu open and 'Staff' selected. The page title is 'Aarogya Family Clinic'. The 'Staff' section has a sub-header 'Everyone who works here and what they can see. Each role sees only its own work.' Below this are three buttons: 'Add from a spreadsheet' (highlighted), 'Doctors' branches and fees', and 'Add a person'. The staff list includes:

Role	Name	Email	Registration Number	Council	Branch	Fee	Since	Actions
DA	Dev Clinic Admin (you)	clinic-admin@dev.health-platform.local			Aarogya Family Clinic — Koramangala	₹500	Since 21 Oct 2026	
MI	Dr. Meera Iyer	doctor@dev.health-platform.local			Aarogya Family Clinic — Koramangala	₹600	Since 21 Oct 2026	Suspend Remove
L1	Lab Professional 1 (HID 1)	labtech1.8900080184428@dev.health-platform.local					Since 21 Oct 2026	Suspend Remove
L1	Lab Professional 2 (HID 1)	labtech2.8900080184428@dev.health-platform.local						Suspend Remove

2. Save your list as a **CSV** file with a header row. Each person needs `full_name`, `email` and `role`. A doctor also needs `registration_number`, `registration_council`, `branch` (the branch's name) and `consultation_fee`. Click **Download a template** if you want a starting point. Choose the file, or paste its text into the box, then click **Check the file**. A file can have up to 200 people.

thehealint

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SETTINGS

Staff

Everyone who works here and what they can see. Each role sees only its own work.

Add from a spreadsheet

Doctors' branches and fees

Add a person

DA

Dev Clinic Admin (you)

clinic-admin@dev.health-platform.local

Aarogya Family Clinic — Koramangala - ₹500

Clinic admin

Doctor

Since 21 Oct 2026

MI

Dr. Meera Iyer

doctor@dev.health-platform.local

Aarogya Family Clinic — Koramangala - ₹600

Doctor

Since 21 Oct 2026

L1

Lab Professional 1 (HID 1)

labtech1.8900080184428@dev.health-platform.local

Lab technician

Since 21 Oct 2026

L1

Lab Professional 2 (HID 1)

labtech2.8900080184428@dev.health-platform.local

Since 21 Oct 2026

Add people from a spreadsheet

Up to 200 people per file.

Save your list as a CSV file with a header row. Each person needs a **full_name**, **email** and **role**. Doctors also need **registration_number**, **registration_council**, **branch** and **consultation_fee**.

[Download a template](#)

CSV FILE

Choose file No file chosen

OR PASTE IT HERE

m,Doctor,KMC-MVHUG07N,Karnataka Medical Council,Aarogya Family Clinic — Koramangala,500

Meera

Joshi,meera.joshi.mvhug07n@example.com,front desk,,,

Check the file

3. Read the check. **Nothing has been added yet.** Each person is marked **Will be applied**, **Nothing to do** (they already have that role, so it is skipped) or **Needs fixing**, with the reason in plain words, for example that a role is not one of the roles above. Lines that need fixing are left out; you can fix the file and check again, or add the others now and import the fixed lines afterwards.

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Staff

Everyone who works here and what they can see. Each role sees only its own work.

Add from a spreadsheet

Doctors' branches and fees

Add a person

DA

Dev Clinic Admin (you)

clinic-admin@dev.health-platform.local

Aarogya Family Clinic — Koramangala - ₹500

Clinic admin

Doctor

Since 21 Oct 2026

MI

Dr. Meera Iyer

doctor@dev.health-platform.local

Aarogya Family Clinic — Koramangala - ₹600

Doctor

Since 21 Oct 2026

L1

Lab Professional 1 (HID 1)

labtech1.8900080184428@dev.health-platform.local

Lab technician

Since 21 Oct 2026

L1

Lab Professional 2 (HID 1)

labtech2.8900080184428@dev.health-platform.local

Since 21 Oct 2026

Add people from a spreadsheet

Up to 200 people per file.

2 will be applied, 1 need fixing and will be left out. Nothing has changed yet.

Asha Menon

asha.menon.mvhug07n@example.com · Receptionist · line 2

Will be applied

Dr. Ravi Kumar

ravi.kumar.mvhug07n@example.com · Doctor · line 3

Will be applied

Meera Joshi

meera.joshi.mvhug07n@example.com · Front desk · line 4

Needs fixing

"front desk" is not a role. Use one of: DOCTOR, RECEPTIONIST, APPOINTMENT_MANAGER, NURSE, BILLING, PHARMACIST, LAB_TECHNICIAN, PHARMACY_ADMIN, LAB_ADMIN, FACILITY_MANAGER, CLINIC_ADMIN, HOSPITAL_ADMIN.

Add 2 people

Choose a different file

Each person is emailed a link to set their password.

- Click **Add N people**. Each person is emailed a link to set their password, exactly as when you add them one at a time. If you click twice or your connection drops and you try again, nobody is added twice.
- The report lists every line: **Added**, **Skipped** or **Not added** with the reason. Correct any that were not added and import just those lines.

The screenshot shows the 'thehealint' interface for 'Aarogya Family Clinic'. The left sidebar lists settings: Staff, Branches, Departments, Practitioners, Weekly availability, Verification documents, Notification delivery, Security, Covering access, and Plan. The main area is titled 'Staff' with the subtitle 'Everyone who works here and what they can see. Each role sees only its own work'. There are three buttons: 'Add from a spreadsheet', 'Doctors' branches and fees', and 'Add a person'. Below these, four staff members are listed: Asha Menon (Receptionist), Dev Clinic Admin (Clinic admin), Dr. Meera Iyer (Doctor), and Dr. Ravi Kumar (Doctor). A modal titled 'Add people from a spreadsheet' is open on the right, showing a summary '2 added, 1 not applied.' and a list of lines from a spreadsheet. Line 2 (asha.menon.mvhug07n@example.com) is 'Added'. Line 3 (ravi.kumar.mvhug07n@example.com) is 'Added'. Line 4 (meera.joshi.mvhug07n@example.com) is 'Not applied' with the reason: 'front desk is not a role. Use one of: DOCTOR, RECEPTIONIST, APPOINTMENT_MANAGER, NURSE, BILLING, PHARMACIST, LAB_TECHNICIAN, PHARMACY_ADMIN, LAB_ADMIN, FACILITY_MANAGER, CLINIC_ADMIN, HOSPITAL_ADMIN.' A 'Done' button is at the bottom of the modal.

A pharmacy admin or lab admin can import only pharmacists or lab technicians, for their own facility. Roles you are not allowed to add show **Needs fixing**.

How to set doctors' branches and fees from a spreadsheet

To put several doctors at branches, or change what they charge, in one go:

- Open **Settings** → **Staff** and click **Doctors' branches and fees**.
- Use one line per doctor per branch, with the columns `email`, `branch` (the branch's name exactly as it appears under Branches) and `consultation_fee`. Click **Download a template** for a starting point. Doctors must already be on your staff: add them first, one at a time or from a spreadsheet.
- Paste or choose the file and click **Check the file**. Nothing changes yet. Each line is **Will be applied**, with a note on what it does ("Fee changes from 600 to 650", or "New: Dr. ... will practise at ..."), **Nothing to do** (already at that fee) or **Needs fixing** with the reason.

The screenshot shows the 'thehealint' interface. On the left, a sidebar lists settings: Staff, Branches, Departments, Practitioners, Weekly availability, Verification documents, Notification delivery, Security, Covering access, and Plan. The main area is titled 'Staff' and includes buttons: 'Add from a spreadsheet', 'Doctors' branches and fees', and 'Add a person'. Below these are three staff entries:

- DA Dev Clinic Admin (you)**: clinic-admin@dev.health-platform.local, Aarogya Family Clinic — Koramangala - ₹500. Roles: Clinic admin, Doctor. Since 21 Oct 2026.
- MI Dr. Meera Iyer**: doctor@dev.health-platform.local, Aarogya Family Clinic — Koramangala - ₹600. Role: Doctor. Since 21 Oct 2026.
- L1 Lab Professional 1 (HID 1)**: labtech1.8900080184428@dev.health-platform.local. Role: Lab technician. Since 21 Oct 2026.
- L1 Lab Professional 2 (HID 1)**: labtech2.8900080184428@dev.health-platform.local.

A modal titled 'Doctors' branches and fees from a spreadsheet' is open on the right. It states: 'Up to 200 changes per file.' and '1 will be applied, 1 need fixing and will be left out. Nothing has changed yet.' It lists two items:

- Dr. Meera Iyer**: Aarogya Family Clinic — Koramangala - line 2. Status: Will be applied. Fee changes from 600 to 650.
- new.doctor@example.com**: Aarogya Family Clinic — Koramangala - line 3. Status: Needs fixing. Message: No doctor with this email works here. Add them under Staff first.

At the bottom of the modal are buttons: 'Apply 1 change' and 'Choose a different file'.

4. Click **Apply N changes**. The report lists every line as **Added**, **Updated**, **Skipped** or **Not applied**.

How to add many branches from a spreadsheet

1. Open **Settings** → **Branches** and click **Add from a spreadsheet**.
2. Each branch needs `name`, `address_line1`, `locality`, `city`, `state`, `pincode`, and its map position, `latitude` and `longitude`. In Google Maps, right-click the spot and copy the two numbers. `phone`, `address_line2`, `landmark` and `is_primary` (yes or no) are optional.

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Branches

Every physical location you see patients at. Patients search by distance, so the pin as the address.

EXISTING BRANCHES

Aarogya Family Clinic — Koramangala

Koramangala, Bengaluru

ADD A BRANCH

BRANCH NAME

ADDRESS LINE 1

LOCALITY

CITY

STATE

PINCODE

Add branches from a spreadsheet

Up to 200 branches per file.

Save your list as a CSV file with a header row. Each branch needs a **name**, **address_line1**, **locality**, **city**, **state**, **pincode** and its map position, **latitude** and **longitude** (in Google Maps, right-click the spot and copy the two numbers). Your plan sets how many branches you can have.

[Download a template](#)

CSV FILE

Choose file No file chosen

OR PASTE IT HERE

Road,Indiranagar,Bengaluru,Karnataka,560038,12.9784,77.6408

Aarogya Family Clinic - Whitefield,5 ITPL

Road,Whitefield,Bengaluru,Karnataka,5600,12.9698,77.7500

Check the file

3. Click **Check the file**. Each branch is **Will be applied**, **Nothing to do** (you already have a branch with that name) or **Needs fixing** with the reason, such as a pincode that is not six digits.

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SETTINGS

Branches

Every physical location you see patients at. Patients search by distance, so the pin as the address.

EXISTING BRANCHES

Aarogya Family Clinic — Koramangala

Koramangala, Bengaluru

ADD A BRANCH

BRANCH NAME

ADDRESS LINE 1

LOCALITY

CITY

STATE

PINCODE

Add branches from a spreadsheet

Up to 200 branches per file.

0 will be applied, **2** need fixing and will be left out. Nothing has changed yet.

Aarogya Family Clinic — Indiranagar

Indiranagar, Bengaluru - line 2

Needs fixing

Your plan does not allow another branch. Ask for a bigger plan under Settings → Plan.

Aarogya Family Clinic — Whitefield

Whitefield, Bengaluru - line 3

Needs fixing

pincode: Enter a valid 6-digit Indian pincode.

Add 0 branches

Choose a different file

Your plan sets how many branches you can have. A line beyond the limit is marked **Needs fixing** with "Your plan does not allow another branch". Ask for a bigger plan under **Settings** → **Plan**, then import it again.

4. Click **Add N branches**. Branches added this way are listed under **Existing branches** straight away.

How your times, fees and currency are shown

Dates, times and fees in ProviderOS follow your organization's **region**: its language, currency and time zone. New organizations are set for India (rupees, India time), and a platform administrator changes the region if you work elsewhere. "Today" on every screen (Reception, Calendar, Billing, the queue) is today **where your clinic is**, whatever time your computer says, and a booking's day is decided the same way. Patients see your fees in your currency and your times on your clock. If something looks an hour or a day off, tell support the clinic's region from this list rather than changing your computer.

The links at the bottom of every screen

The footer carries **Terms**, **Privacy** and **Cookies**. They open the company's published policies. When someone creates an account they are told that doing so means they agree to the Terms and Privacy policy.

When a page will not open

- **"We could not find that page."** The link is old or mistyped. Choose **Go to the start**.
- **"This page could not be shown."** Choose **Try again**. If it happens again, tell support and quote the **Reference** shown under the message, which lets them find exactly what went wrong.
- **A banner saying you are offline.** Your connection dropped. Changes will not save until it returns; the banner disappears by itself.

How to resend an invitation

Use this when someone says the email never arrived or the link has expired. The button is only there until they've set a password.

1. On **Settings** → **Staff**, find the person (they have the **Invited — hasn't signed in yet** pill).
2. Click **Resend invitation**. A message confirms "New sign-in link sent to *email*".

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Staff

Everyone who works here and what they can see. Each role sees only its own work.

Add from a spreadsheet Doctors' branches and fees Add a person

AR	Asha Rao asha.rao.mvhu1rjd@example.test Receptionist Since 21 Oct 2026	Suspend Remove
KM	Dr. Kavya Menon kavya.menon.mvhu1rjd@example.test Lakeview Family Clinic — Indiranagar - ₹600 Doctor Invited — hasn't signed in yet Since 21 Oct 2026	Resend invitation Suspend Remove
PN	Priya Nair (you) founder.mvhu1rjd@example.test Clinic admin Since 21 Oct 2026	

New sign-in link sent to kavya.menon.mvhu1rjd@example.test

Asha has now set her password, so her Invited pill and Resend button are gone. Dr. Kavya Menon hasn't, and a new link has just been sent to her.

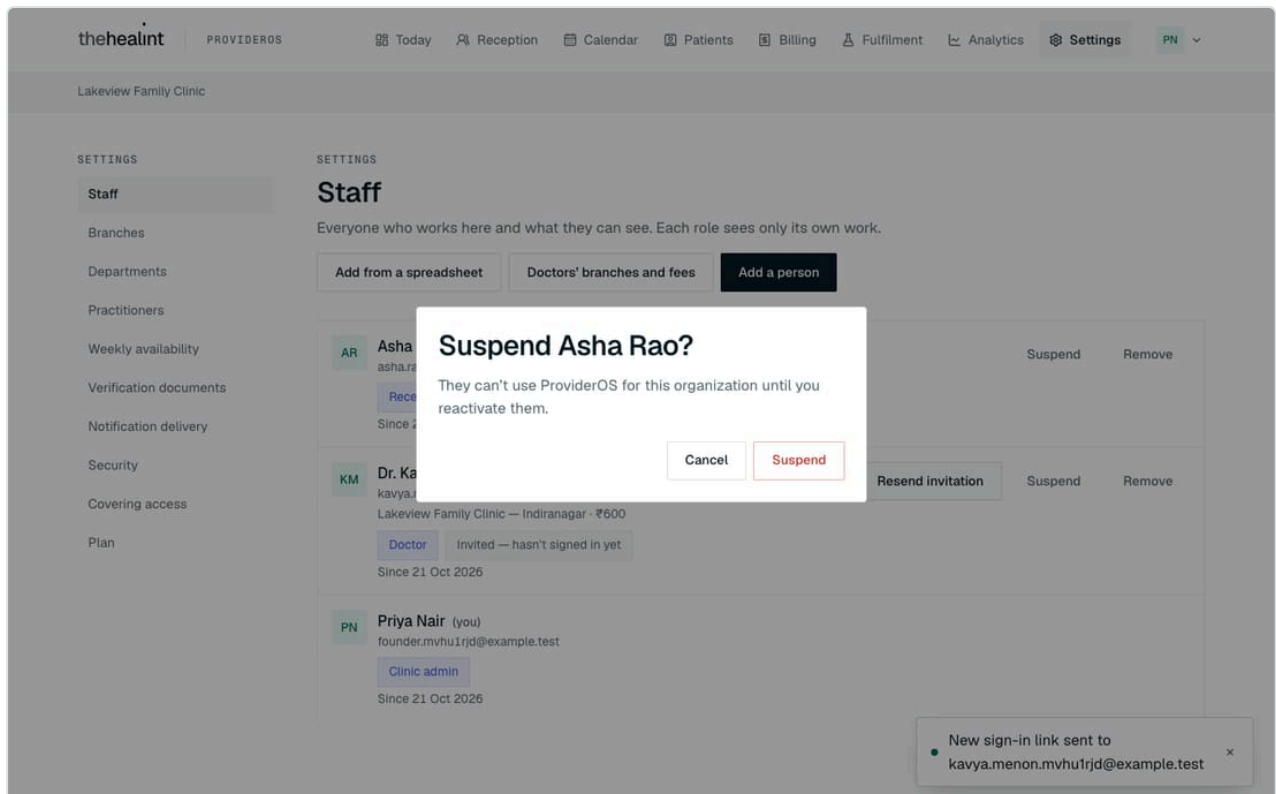
How to suspend, reactivate or remove someone

Suspend is temporary: the person can't use ProviderOS for your organization until you reactivate them.

Remove is for someone who has left: they lose access, but their past work stays on record.

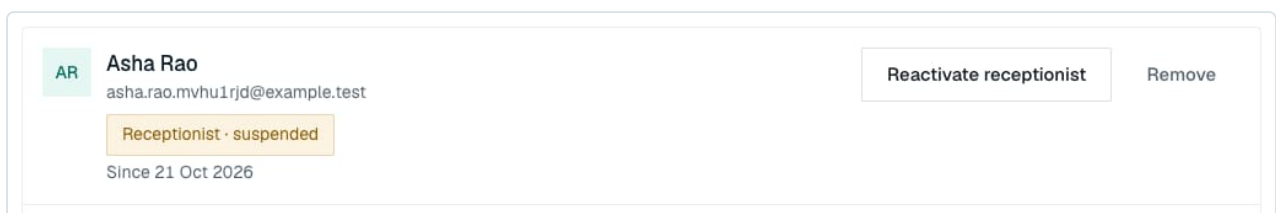
Suspend

1. On **Settings** → **Staff**, click **Suspend** on the person's row. (If they hold several roles, there is one button per role, for example "Suspend receptionist".)
2. Read the box and click **Suspend**.



"Suspend Asha Rao? They can't use ProviderOS for this organization until you reactivate them."

3. Their pill now reads **"Role · suspended"** and the button changes to **Reactivate role**.



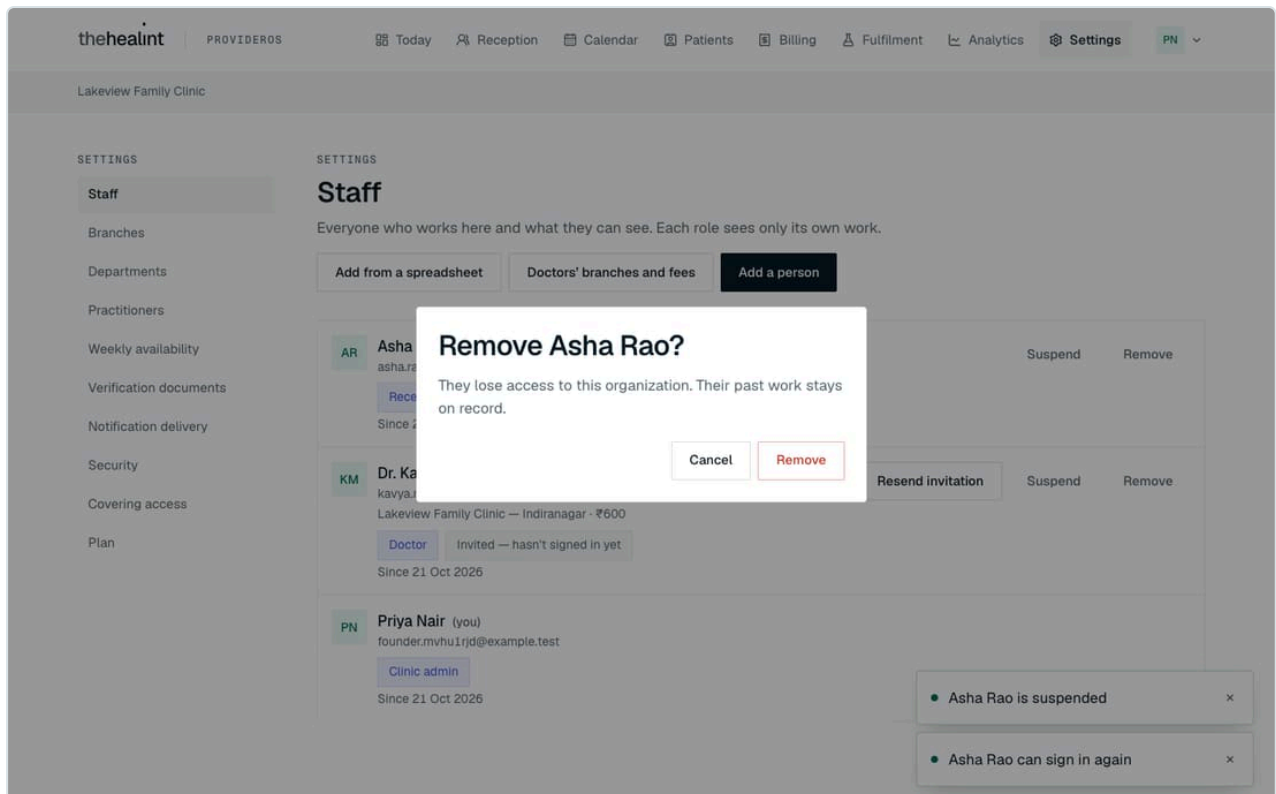
*"Receptionist · suspended" and **Reactivate receptionist**.*

Reactivate

Click **Reactivate role** and confirm with **Reactivate**. They can sign in and work in that role again.

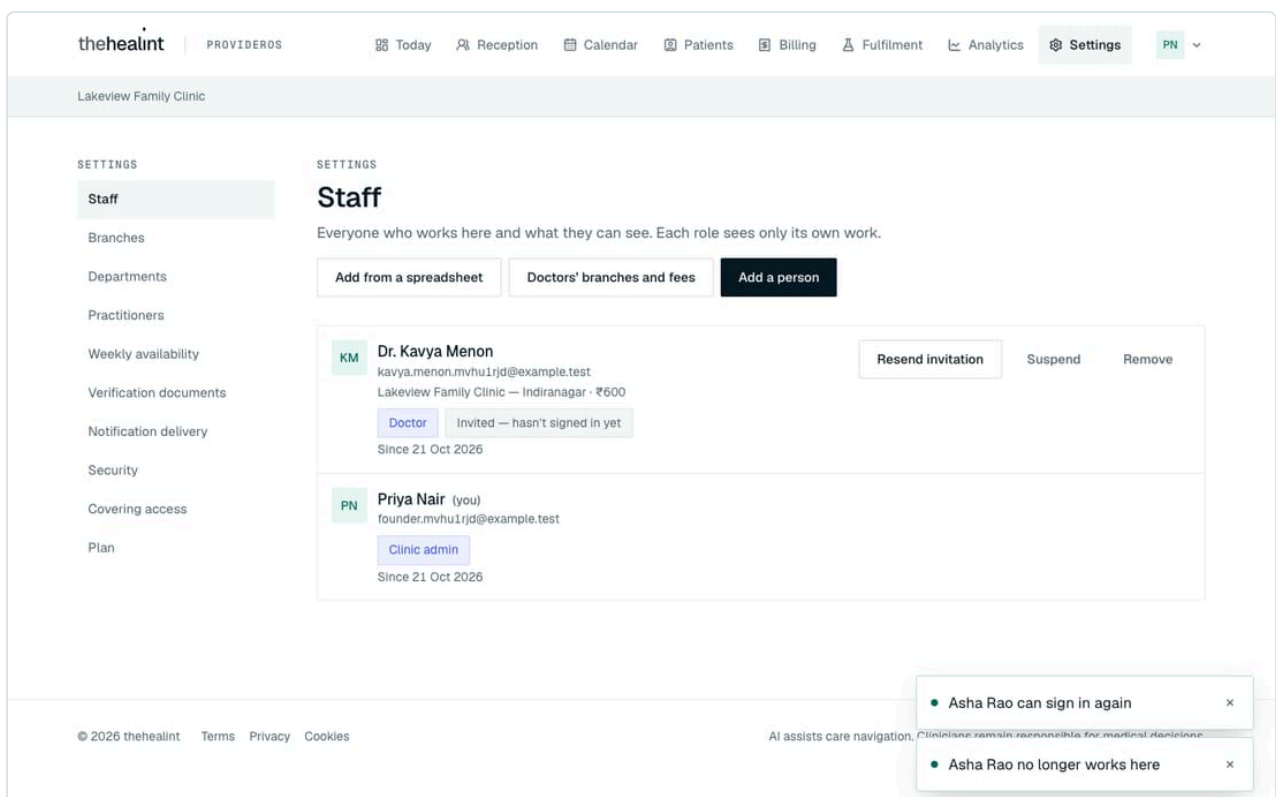
Remove

1. Click **Remove** on the person's row.
2. Read the box and click **Remove**. This takes away every role they hold at your organization.



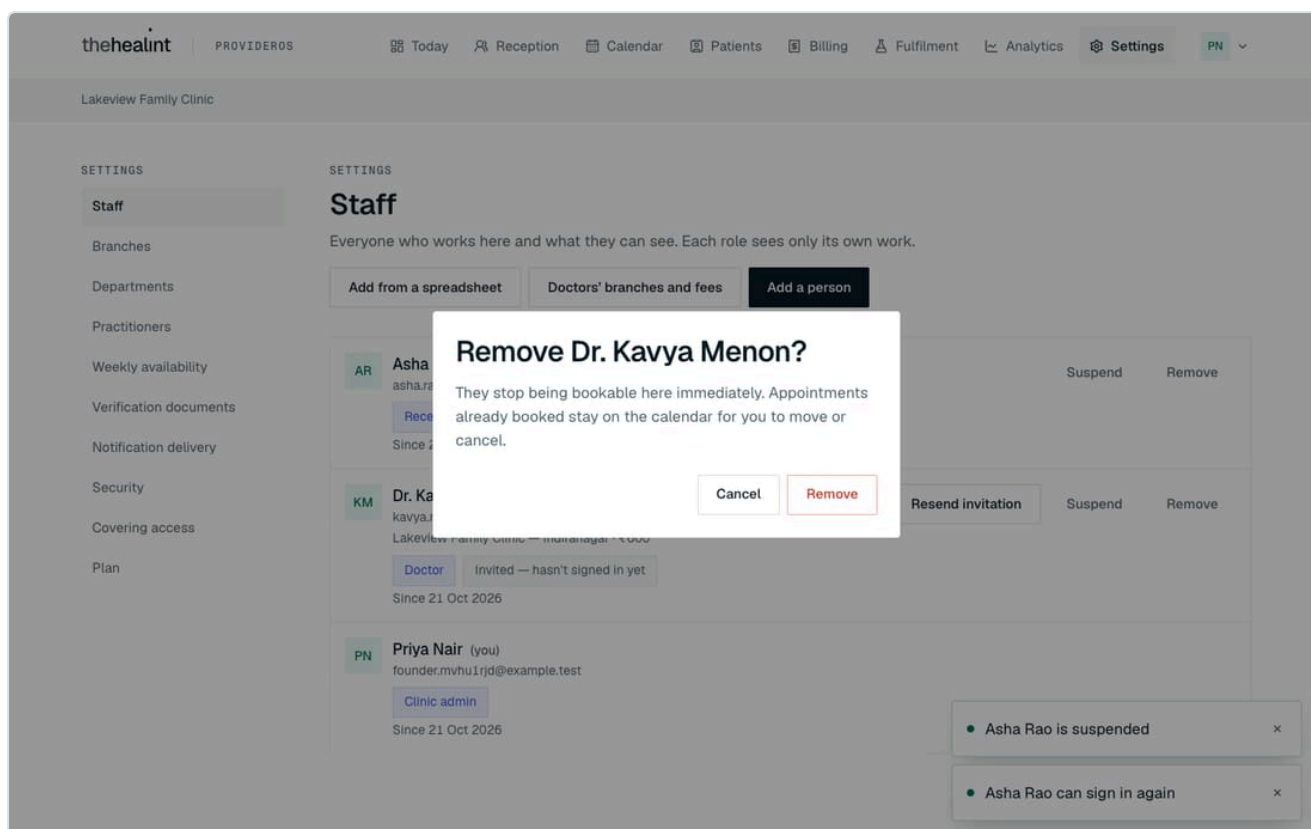
"Remove Asha Rao? They lose access to this organization. Their past work stays on record."

3. They disappear from the Staff list and a message confirms *"Name no longer works here"*.



Asha Rao is gone from the list. The messages at the bottom right confirm each step: suspended, can sign in again, no longer works here.

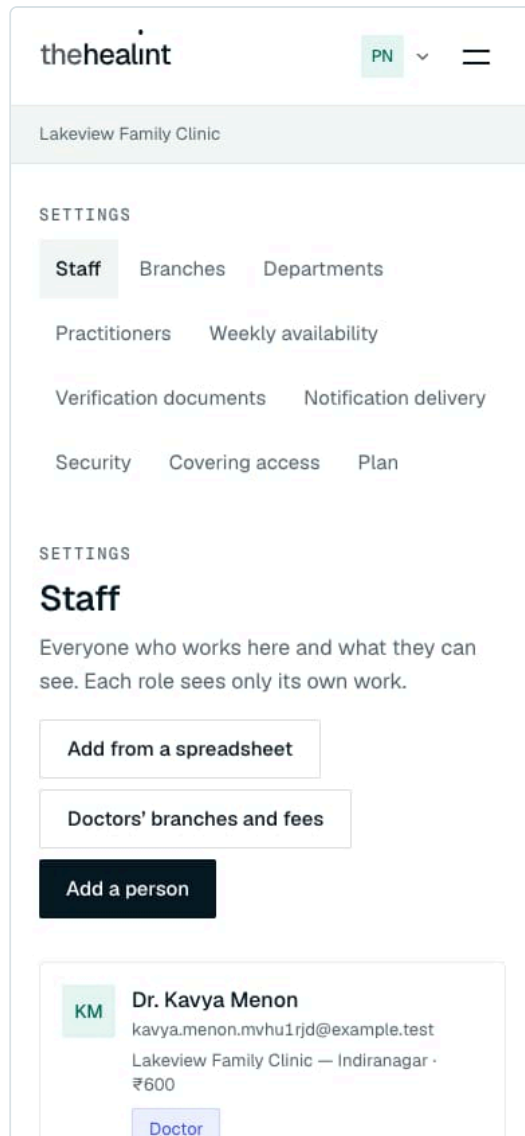
For a doctor, suspending or removing them also stops them being bookable, straight away. Appointments they already have stay on the calendar for you to move or cancel.



"Remove Dr. Kavya Menon? They stop being bookable here immediately. Appointments already booked stay on the calendar for you to move or cancel."

If it doesn't work: "This is the only admin. Add another clinic admin before removing this one." Your organization must always have at least one active clinic or hospital admin. Add a second admin first.

The Staff page works on a phone too. The Settings menu becomes a row of links above the page.



Settings → Staff at phone width.

How to set a doctor's weekly hours

Hours are set per doctor **and per branch**, so a doctor can keep different hours at two branches. Patients can only book times inside these hours.

1. Go to **Settings** → **Weekly availability**.
2. If you have more than one branch, pick the **Branch**. Then pick the **Doctor**.
3. You'll see their week, Monday to Sunday. A doctor with no hours shows "No hours set yet — patients can't book *doctor* here until at least one day has hours."

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Weekly availability

When each doctor can be booked. Hours are set per branch, so a doctor can keep different hours at two branches.

DOCTOR
Dr. Kavya Menon

DR. KAVYA MENON - THIS WEEK

No hours set yet — patients can't book Dr. Kavya Menon here until at least one day has hours.

Drag down an empty part of a day to add hours there — or tap where they start, then where they end.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							
1 PM							

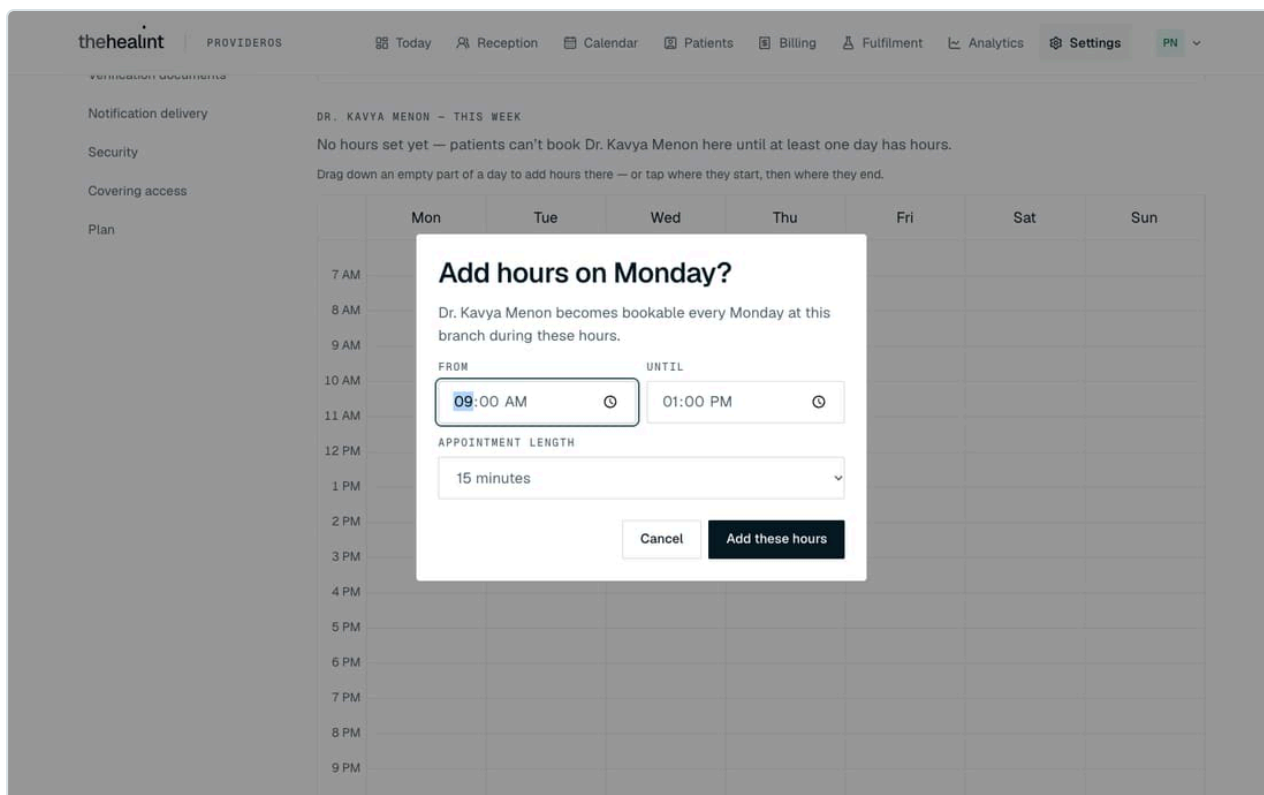
Dr. Kavya Menon's week with no hours yet.

Draw hours on the week

1. Press on an empty part of a day where the hours start, and drag down to where they end. (Or click once where they start, then once where they end.)
2. A box asks **Add hours on *day*?** Adjust **From**, **Until** and **Appointment length** if you need to.
3. Click **Add these hours**. A message confirms "Hours added for *doctor* on *day*".

thehealint · Runbook: Clinic admin

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"Add hours on Monday? Dr. Kavya Menon becomes bookable every Monday at this branch during these hours." From 9:00 AM, Until 1:00 PM, 15-minute appointments.

Or add hours by typing the times

1. Scroll to **Add hours by time**.
2. Choose the **Day** and **Appointment length** (10, 15, 20, 30, 45 or 60 minutes), and type **From** and **Until**.
3. Click **Add hours for doctor**.

ADD HOURS BY TIME

DAY
Wednesday

APPOINTMENT LENGTH
15 minutes

FROM
02:00 PM

UNTIL
06:00 PM

Add hours for Dr. Kavya Menon

Wednesday, 2:00 PM to 6:00 PM, 15-minute appointments.

The hours appear as shaded blocks on the week, and as a list under **Hours set**.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
7 AM							
8 AM							
9 AM	9:00 AM 1:00 PM 15 min						
10 AM							
11 AM							
12 PM							
1 PM							
2 PM			2:00 PM 6:00 PM 15 min				
3 PM							
4 PM							
5 PM							
6 PM							
7 PM							
8 PM							
9 PM							

HOURS SET

Monday · 9:00 AM–1:00 PM 15-minute appointments
Remove

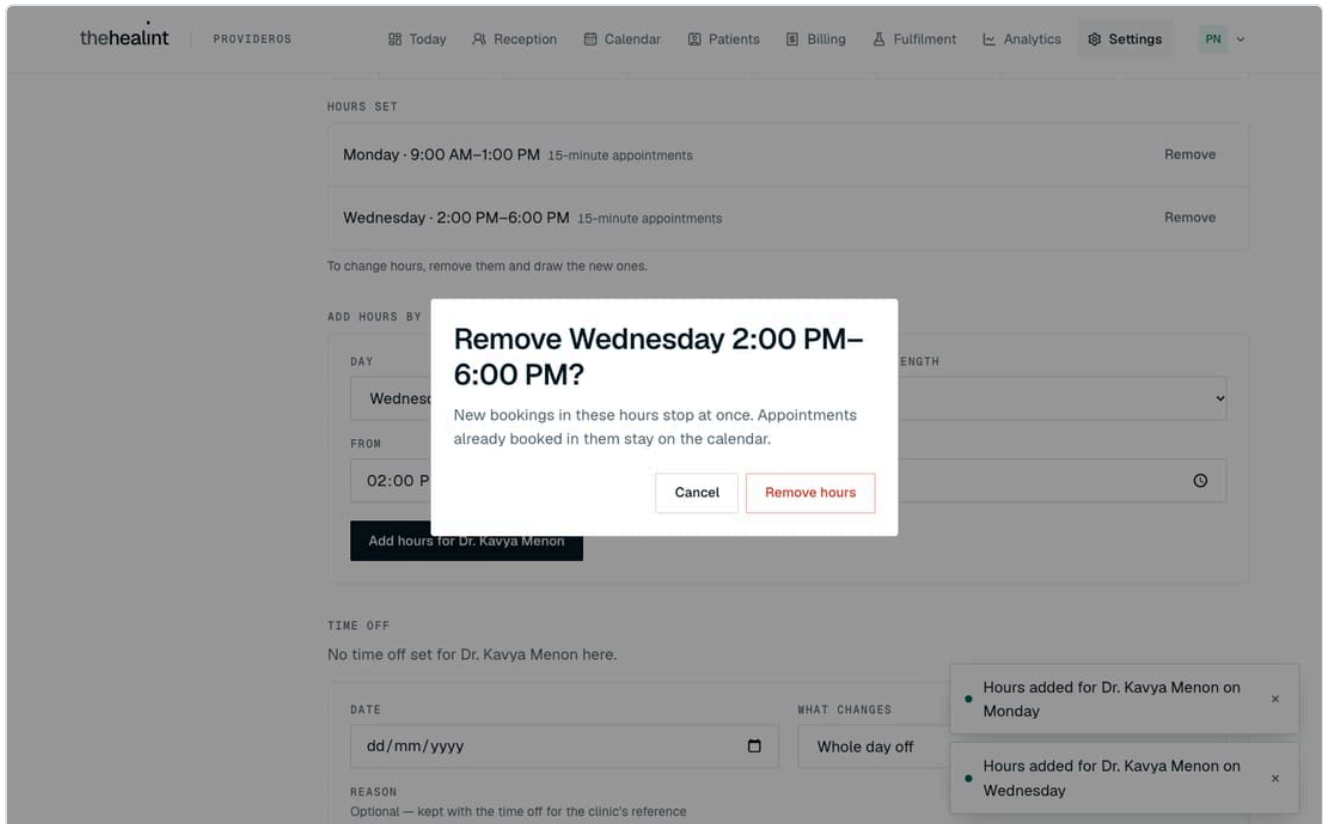
Wednesday · 2:00 PM–6:00 PM 15-minute appointments
Remove

To change hours, remove them and draw the new ones.

Monday morning and Wednesday afternoon on the week grid, and the same two lines under Hours set, each with **Remove**.

Remove hours

1. Under **Hours set**, click **Remove** on the line.
2. Click **Remove hours** to confirm. New bookings in those hours stop at once. Appointments already booked stay on the calendar.



"Remove Wednesday 2:00 PM–6:00 PM?" with **Cancel** and **Remove hours**.

To **change** hours, remove them and draw the new ones. There's no way to edit a block in place.

Add time off

Use **Time off** for a day the doctor is away, or a day with different hours.

1. Scroll to **Time off**.
2. Choose the **Date** and, under **What changes**, **Whole day off** or **Different hours** (then type From and Until).
3. Add a **Reason** if you like. It's only for the clinic's reference.
4. Click **Add time off for doctor**.

TIME OFF

2 Nov 2026

Not available all day · Medical conference

Day off

Remove

DATE

WHAT CHANGES

dd/mm/yyyy

Whole day off

REASON

Optional — kept with the time off for the clinic's reference

Add time off for Dr. Kavya Menon

Time off stops new bookings in those hours; anyone already booked that day stays booked — check the calendar.

26 Oct 2026, "Not available all day · Medical conference", with the **Day off** pill and **Remove**.

Time off stops new bookings in those hours. Anyone already booked that day stays booked, so check the Calendar and move them ([03-front-desk.md](#)). **Remove** on a time-off line puts that date back to the weekly hours. It happens straight away, without asking.

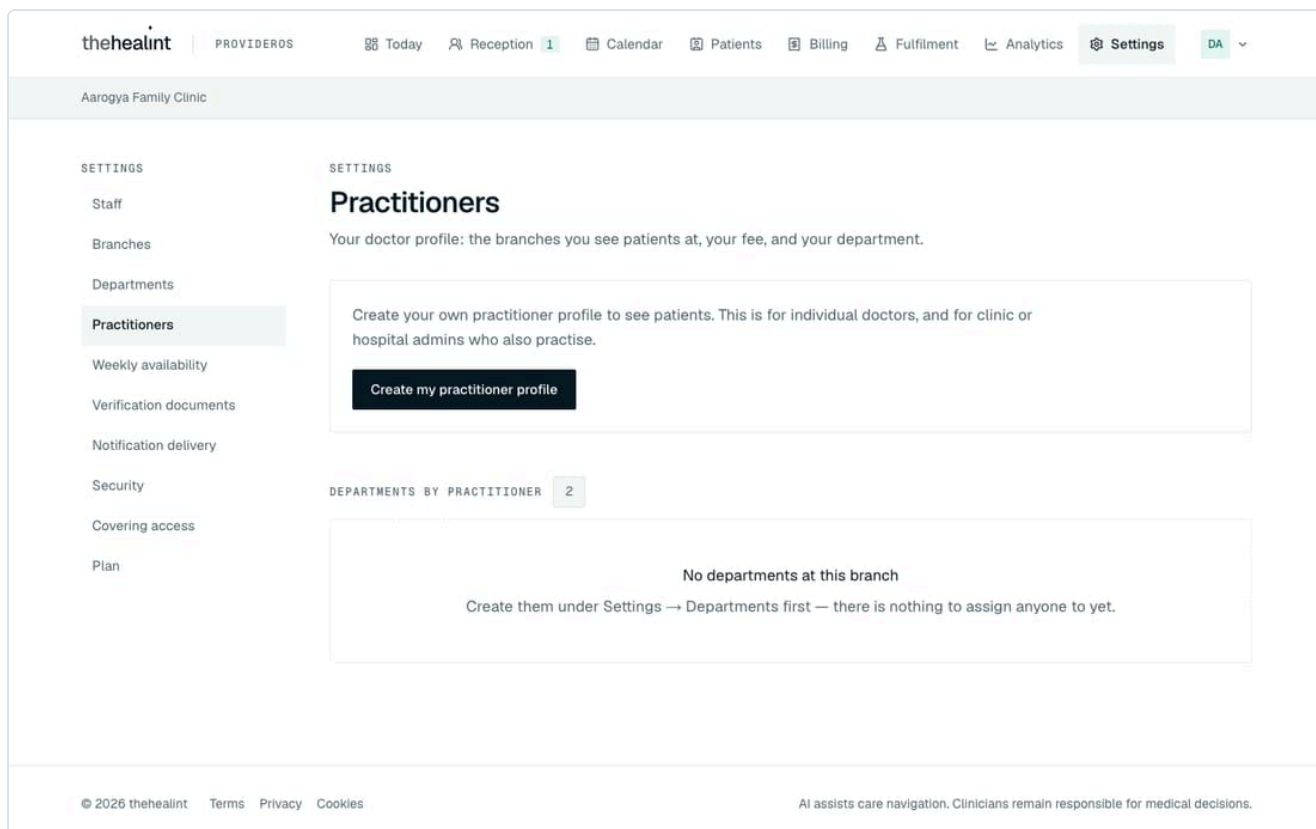
If it doesn't work:

- "No doctors at this branch yet" means nobody has been added as a doctor at that branch. Add them under Settings → Staff.
- "The hours on that date must end after they start." Check From and Until.

How to set up your own doctor profile (if you also see patients)

Settings → **Practitioners** is about **your own** doctor profile only. Other doctors are added from Settings → Staff.

1. Go to **Settings** → **Practitioners** and click **Create my practitioner profile**.
2. Under **Affiliate with a branch**, choose the **Branch**, your **Consultation fee** (in rupees) and, optionally, your **Department**. Click **Affiliate with branch**.
3. Under **Departments by practitioner**, pick a **Branch** to see every doctor there. Change a doctor's department in the drop-down beside their name. It saves straight away.



*Settings → Practitioners: **Create my practitioner profile**, and Departments by practitioner ("No departments at this branch").*

If it doesn't work: after you reload the page, **Create my practitioner profile** shows again even if you already have a profile. Don't create a second one. Your affiliation is still saved and appears on the Staff list and under Departments by practitioner.

How to review covering access

When a doctor opens another doctor's patient (to cover for them), they must give a reason. This page is your log of every time that happened.

1. Go to **Settings** → **Covering access**.
2. Set **From** and **To**. Both start on today.
3. Read the table: **Date**, **Patient**, **Assigned to**, **Covered by** and **Reason**.

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Practitioners
Weekly availability
Verification documents
Notification delivery
Security
Covering access
Plan

SETTINGS

Covering access

Every time a colleague opened another practitioner's patient — who covered, for whom, and the reason they gave.

FROM
21/09/2026
TO
21/10/2026

No covering access in this window

Nothing to show when every encounter in range was opened by its own assigned practitioner.

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AI assists care navigation. Clinicians remain responsible for medical decisions.

One cover in the last month: Dr. Meera Iyer opened Ananya Sharma's visit, which was assigned to Dev Clinic Admin, "Covering while Dr. Dev is in the operating theatre".

The doctor who was covered for gets an email each time. You don't. Check this page regularly.

How to check notification delivery

Every confirmation and reminder your organization sends to patients is listed here, with what happened to it.

1. Go to **Settings** → **Notification delivery**.
2. The tiles show how many are **Pending**, **Sent**, **Failed** and **Dead-lettered** (given up on, and won't be retried).
3. Anything that failed is listed under **Failed and dead-lettered deliveries**, with the **Channel**, **Template**, **Status**, **Attempts**, **Last error** and **Updated** time.

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PROVIDEROS

Today

Reception 1

Calendar

Patients

Billing

Fulfilment

Analytics

Settings

DA

Aarogya Family Clinic

SETTINGS

Staff

Branches

Departments

Practitioners

Weekly availability

Verification documents

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Plan

SETTINGS

Notification delivery

Every reminder and confirmation this organization sends, and what happened to it. Dead-lettered means it will not be retried.

PENDING0

SENT0

FAILED0

DEAD-LETTERED0

FAILED AND DEAD-LETTERED DELIVERIES

Nothing has failed

Every notification has sent, or is still pending its first attempt.

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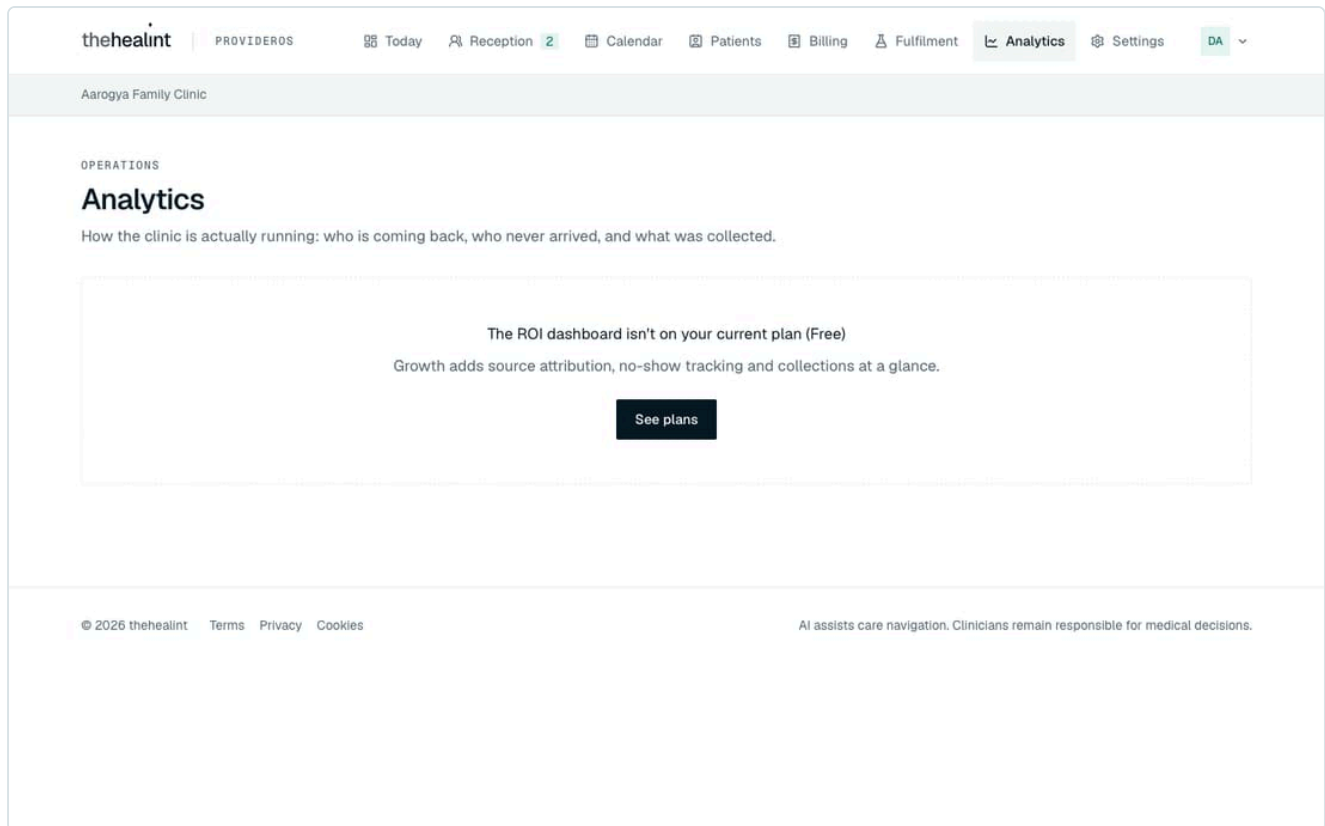
AI assists care navigation. Clinicians remain responsible for medical decisions.

20 sent, nothing failed: "Every notification has sent, or is still pending its first attempt."

This page is for checking only. You can't resend, switch messages off or change their wording. If something keeps failing, tell thehealint support.

How to read Analytics

1. Click **Analytics** in the top menu.
2. On the **Growth** plan you'll see, for the dates you pick under **From** and **To** (the last 30 days to start with): **Appointments**, **New vs returning**, **No-show rate**, **Avg. wait** and **Collected**, then tables **By doctor**, **By branch** and **By department**. Click **Refresh** to reload.
3. On the **Free** plan you'll see a message instead.

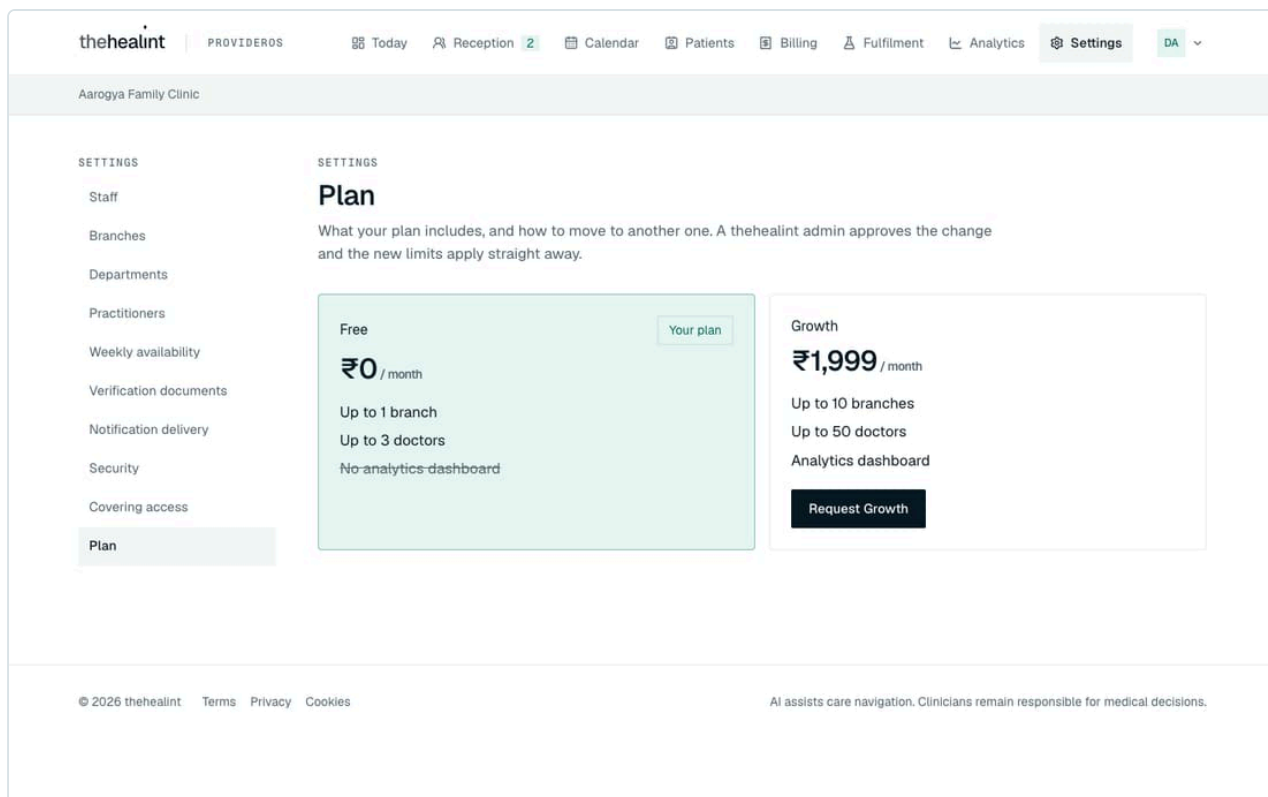


"The ROI dashboard isn't on your current plan (Free)", with **See plans** to ask for Growth (see the next section).

How to change your plan

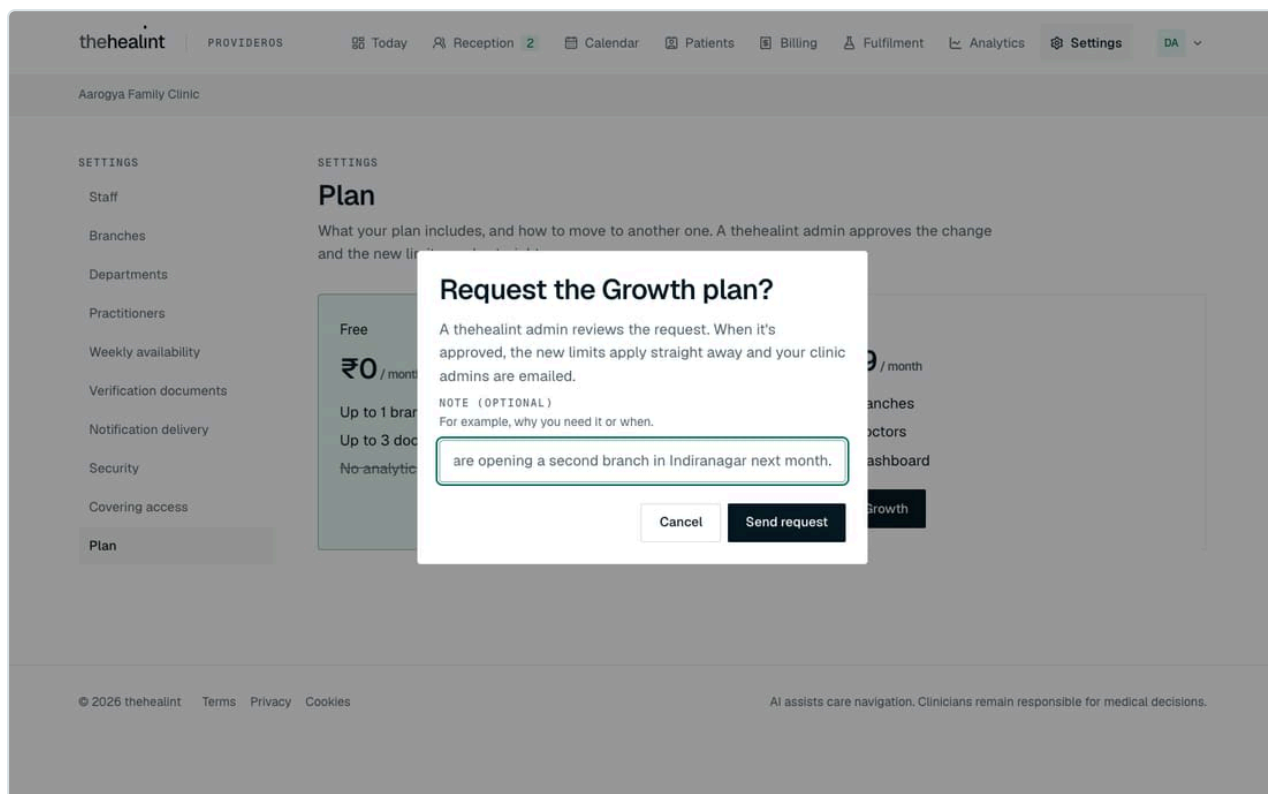
Your plan sets your limits — how many branches and doctors, and whether you get Analytics. To move plan, you ask; a thehealint admin approves it and the new limits apply straight away.

1. Go to **Settings** → **Plan** (or click **See plans** wherever a limit stops you). Your current plan is highlighted with **Your plan**; each plan lists what it includes.



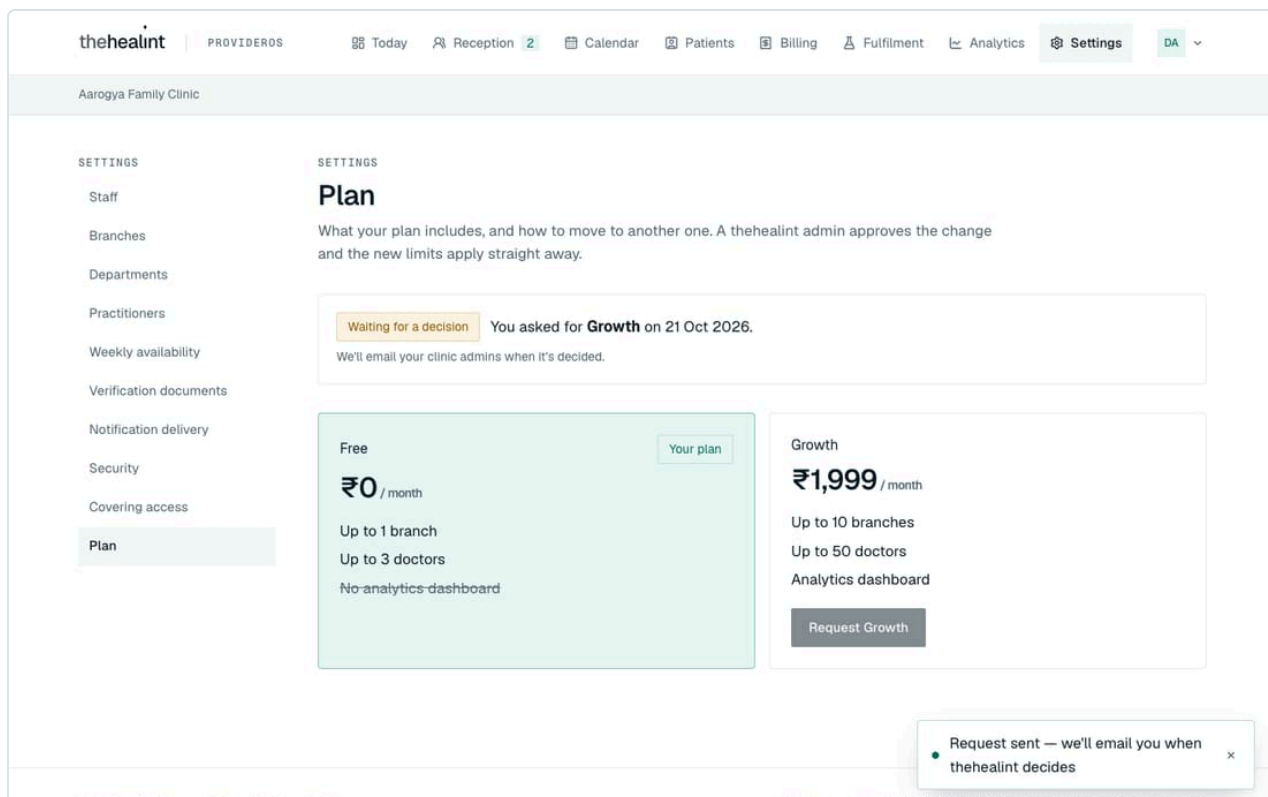
*Free (your plan) and Growth side by side, with what each includes and **Request Growth**.*

2. Click **Request** on the plan you want. Add a note if it helps (for example why, or when you need it), then click **Send request**.



The request box, with a note about the second branch.

3. The page shows **Waiting for a decision**. You can't send another request until this one is decided.



The request is with thehealint; both plans stay as they are until it's decided.

4. Every clinic and hospital admin gets an email when it's decided. If approved, the new limits apply at once — add the branch or open Analytics. If declined, the reason is on the email and on this page.

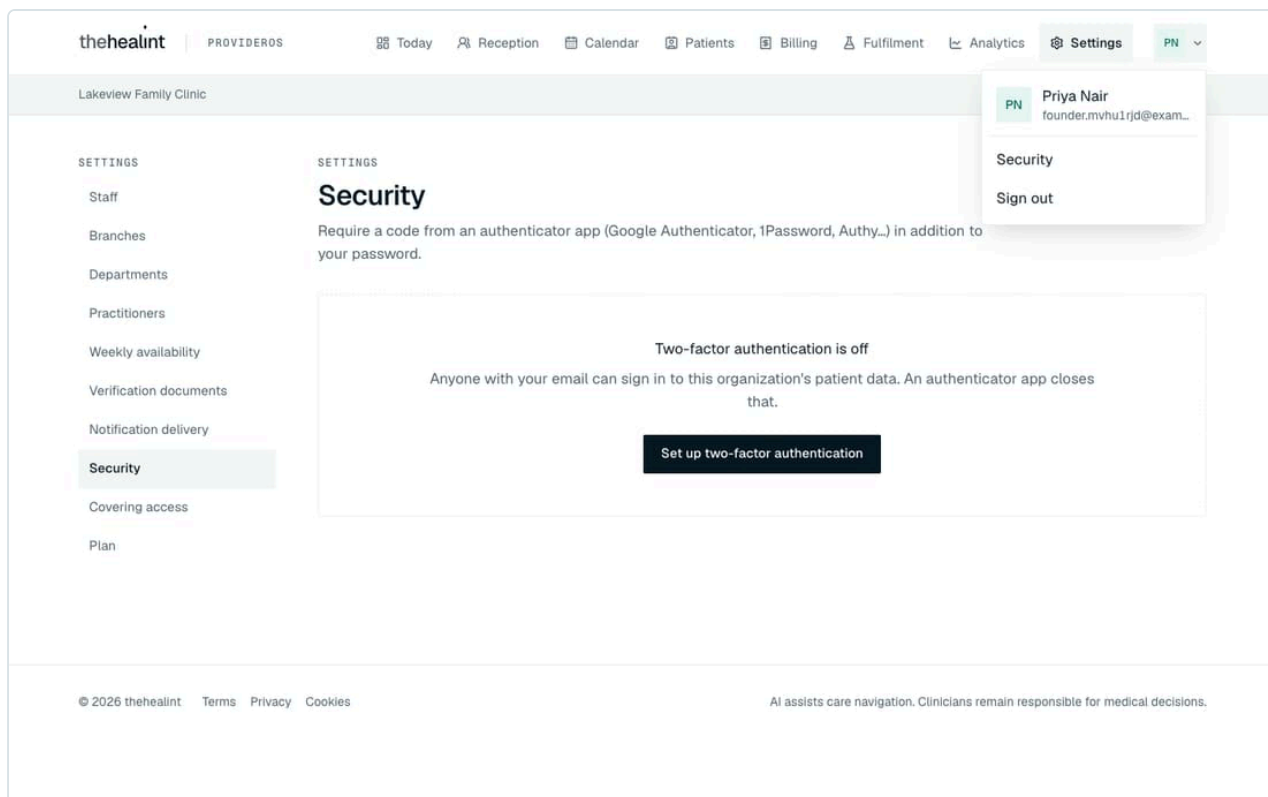
If it doesn't work:

- **"There is already a plan request waiting for a decision."** Someone at your clinic already asked. Wait for the email.
- **The Request button is greyed out.** A request is already waiting.

How to turn on two-factor sign-in

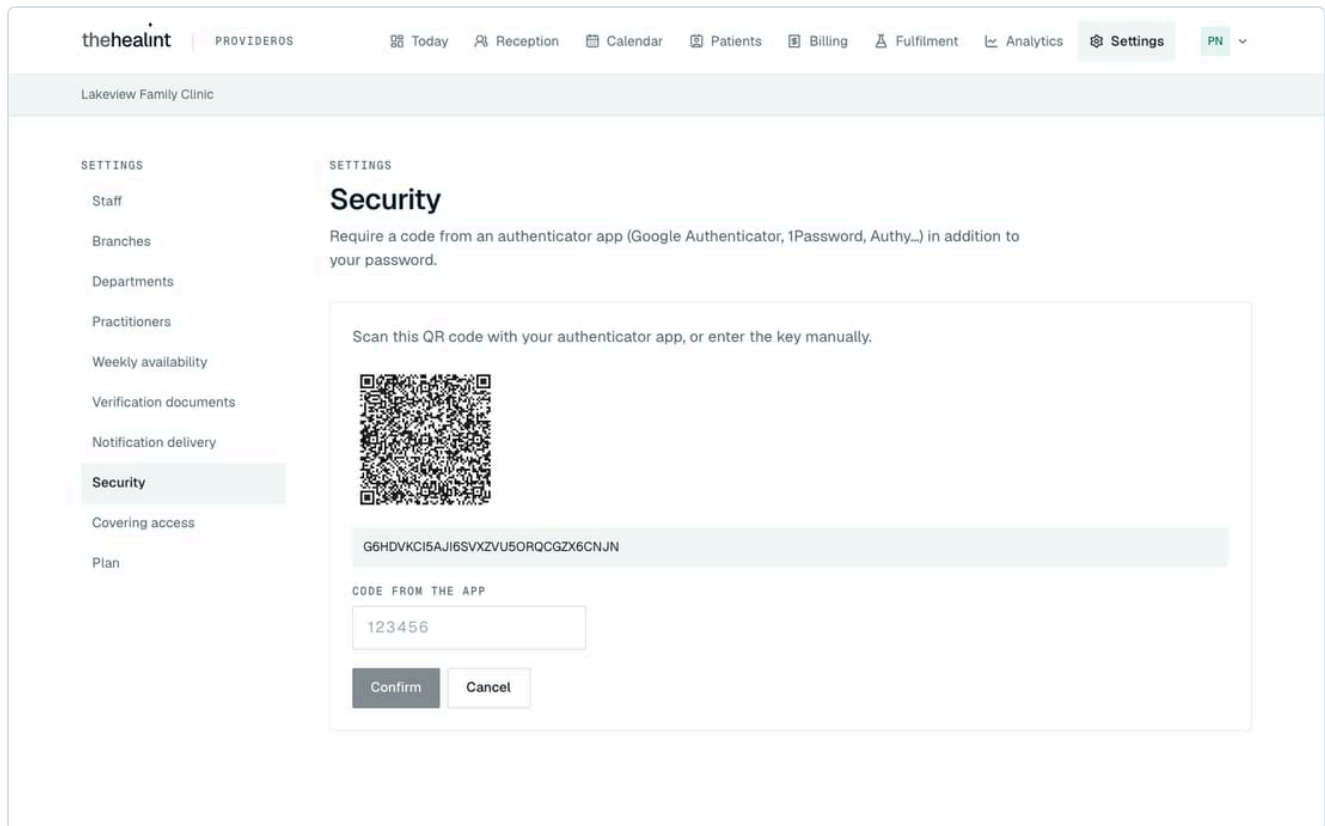
Two-factor sign-in means a password alone isn't enough to get into your patients' data. We strongly recommend it for every admin.

1. Click your initials at the top right, then **Security** (or go to **Settings** → **Security**).



Your name and email, **Security** and **Sign out**. Behind it, "Two-factor authentication is off".

2. Click **Set up two-factor authentication**.
3. Scan the QR code with an authenticator app (Google Authenticator, 1Password, Authy...), or type the key shown under it.
4. Type the 6-digit **Code from the app** and click **Confirm**. You'll see "Two-factor authentication is now active on this account."



*The QR code, the key to type in by hand, **Code from the app**, **Confirm** and **Cancel**.*

From now on, every ProviderOS sign-in on the web asks for the code after your password.

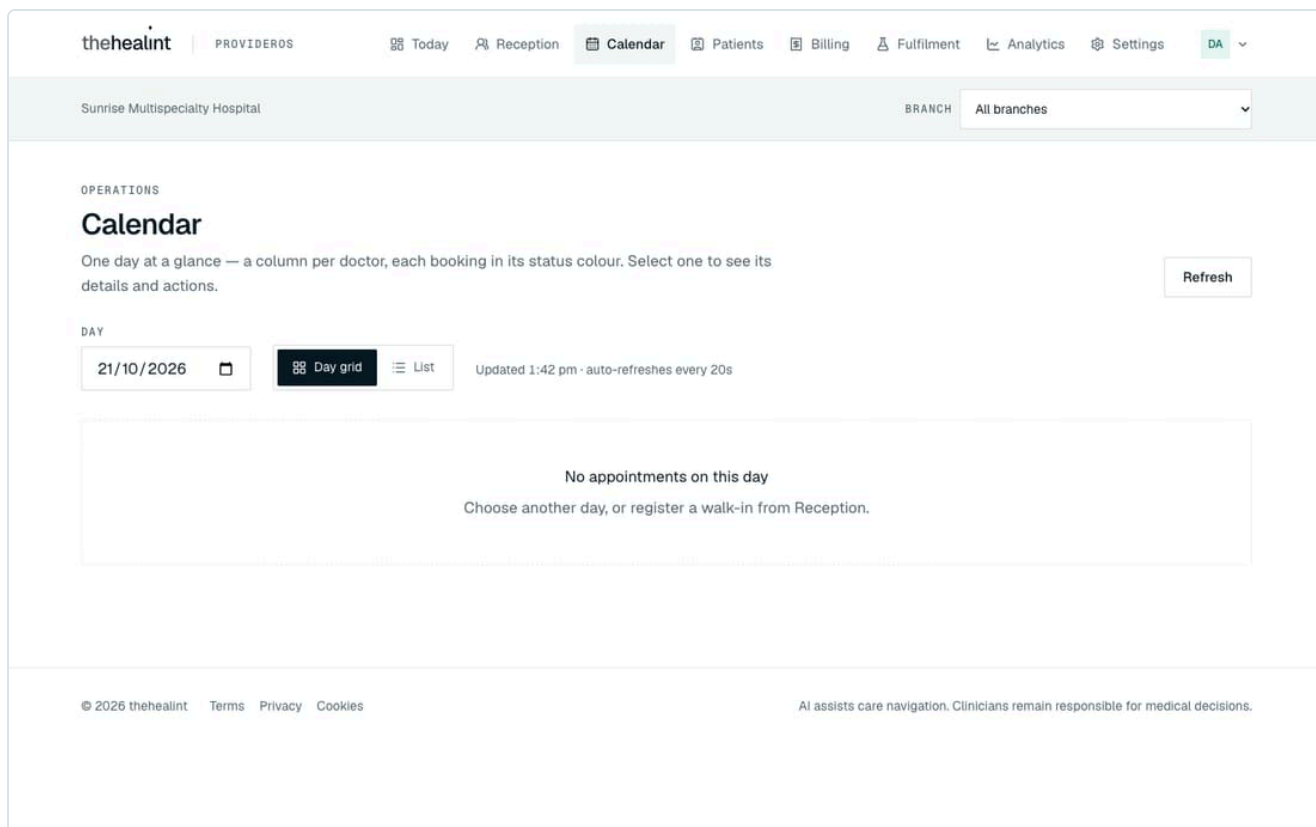
To remove an authenticator, click **Remove** beside it on the same page and confirm with **Remove authenticator**. Removing the last one turns two-factor sign-in off.

If it doesn't work: "That code did not match — try again." Codes change every 30 seconds; type the current one. Check the time on your phone is set automatically.

How to switch branch

If your organization has **more than one branch**, a **Branch** selector appears on the grey bar under the menu, on every page.

1. Choose a branch, or **All branches**.
2. Reception, the walk-in form, Calendar, the waiting count beside Reception, and the starting branch on Weekly availability follow your choice.



Sunrise Multispecialty Hospital: **Branch** — **All branches** at the right of the grey bar, here on Calendar.

Good to know:

- **Today**, **Billing** and **Analytics** always count every branch.
- Departments and Practitioners have their own branch drop-downs.
- Your choice resets to **All branches** when you reload the page.
- With only one branch there's nothing to choose, so the selector isn't shown.

If you are a facility manager

A facility manager runs the day-to-day operation. You see the same menu as an admin, with two differences:

- **Settings** → **Staff** and **Settings** → **Covering access** aren't in your Settings menu. Opening them shows "Not part of your role".
- On **Branches**, **Departments**, **Practitioners** and **Verification documents** you can look, but saving fails with a permission error. Ask a clinic admin to make those changes.

Everything else in this guide works for you, including **Weekly availability** and time off, Reception, Calendar, Patients, Billing, Fulfilment, Analytics, Notification delivery and Security.

Things you can't do here — and who to ask

You want to...	What to do
Edit or remove a branch, or move its pin	Ask thehealint support
Add a second branch on the Free plan	Settings → Plan → Request Growth ; a thehealint admin approves it
Rename or remove a department	Not possible yet. Ask thehealint support
Delete or replace a verification document	Not possible. Upload the new one alongside
Send the organization back for review after changes are requested	Upload the corrected document in Settings → Verification documents, then Submit for review again
Change your subscription plan (for example to Growth, for Analytics)	Settings → Plan → Request ... ; a thehealint admin decides it
Refund a payment or void an invoice	There's no button for this in ProviderOS. Ask thehealint support
Resend a failed patient notification	Not possible from Notification delivery. Ask thehealint support
Read a patient's clinical notes or run a consultation	Only the patient's doctor can, in their own login (02-doctor.md)
Switch between two organizations you run	Not possible. ProviderOS opens the first one. Use a separate login for the second
Let a pharmacy or lab admin add their own staff	Independent facility admins now use their own Settings → Staff: pharmacy admins can add pharmacists; lab admins can add lab technicians
Verify your pharmacy or lab, or a pharmacist's credential	thehealint's reviewers do this (06-pharmacy-and-lab.md)

Quick reference

Task	Where	Button
Create a new organization	ProviderOS sign-in	Setting up a new clinic? Create an account → Create organization
Upload a verification document	Settings → Verification documents	Upload document
Send a rejected application back	Settings → Verification documents	upload the fix → Submit for review again
Change your plan	Settings → Plan	Request ... → Send request
Publish / unpublish	Today	Publish to marketplace / Unpublish
Add a branch	Settings → Branches	Find or click the map → Add branch
Add a department	Settings → Departments	Add department

Task	Where	Button
Add a staff member or doctor	Settings → Staff	Add a person → Add and send invitation
Resend an invitation	Settings → Staff	Resend invitation
Suspend / reactivate	Settings → Staff	Suspend / Reactivate <i>role</i>
Remove someone	Settings → Staff	Remove
Set a doctor's hours	Settings → Weekly availability	Drag on the week → Add these hours , or Add hours for <i>doctor</i>
Remove hours	Settings → Weekly availability → Hours set	Remove → Remove hours
Add time off	Settings → Weekly availability → Time off	Add time off for <i>doctor</i>
Your own doctor profile	Settings → Practitioners	Create my practitioner profile → Affiliate with branch
Review covering access	Settings → Covering access	Set From / To
Check failed notifications	Settings → Notification delivery	—
See analytics	Analytics	Refresh (Growth plan)
Turn on two-factor sign-in	Your initials → Security	Set up two-factor authentication → Confirm
Switch branch	Grey bar under the menu	Branch selector