

Runbook: Front desk (Receptionist and Appointment manager)

Who this is for

This guide is for **receptionists** and **appointment managers** at a clinic or hospital on thehealint. Both roles see the same screens and do the same work: checking patients in as they arrive, registering walk-ins, running the queue, moving or cancelling bookings for patients who phone in, and taking payments at the counter.

You work in **ProviderOS**, in a web browser — usually on the clinic's front-desk computer or a tablet.

What you'll see

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

Menu item	What it's for
Reception	Today at the desk: register walk-ins, check in booked patients, run the queue. The number beside it is how many patients are waiting.
Calendar	Every doctor's bookings, as a day grid or a list. Move or cancel bookings here.
Patients	Everyone who has booked with your clinic, and their visits.
Billing	The day's invoices, payments at the counter and discounts.

Your initials sit at the top right. Click them to open **Security** (two-factor sign-in) or **Sign out**. The clinic's name is in the grey bar under the menu. If your clinic has more than one branch, a **Branch** selector also appears there; Reception and Calendar follow it.

thehealint
PROVIDEROS

Reception 1
Calendar
Patients
Billing
RK

Aarogya 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

2:00 pm	Thanush Garimella Dr. Meera Iyer · Aarogya Family Clinic — Koramangala Booked	Check in Reschedule Cancel
4:45 pm	Priya Nair Dev Clinic Admin · Aarogya Family Clinic — Koramangala Booked	Check in Reschedule Cancel

TODAY'S QUEUE

Live — updated 1:43 pm

#1

Rahul Verma
 Dev Clinic Admin

In consultation

*Reception: Register a walk-in at the top, then Expected today (two booked patients with **Check in**, **Reschedule** and **Cancel**), then Today's queue.*

On a phone-sized screen the menu folds into the ≡ button and the page stacks into one column.

thehealint

RK

Aarogya 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

4:45 pm

Priya Nair

Dev Clinic Admin · Aarogya Family Clinic — Koramangala

Booked

Check in Reschedule

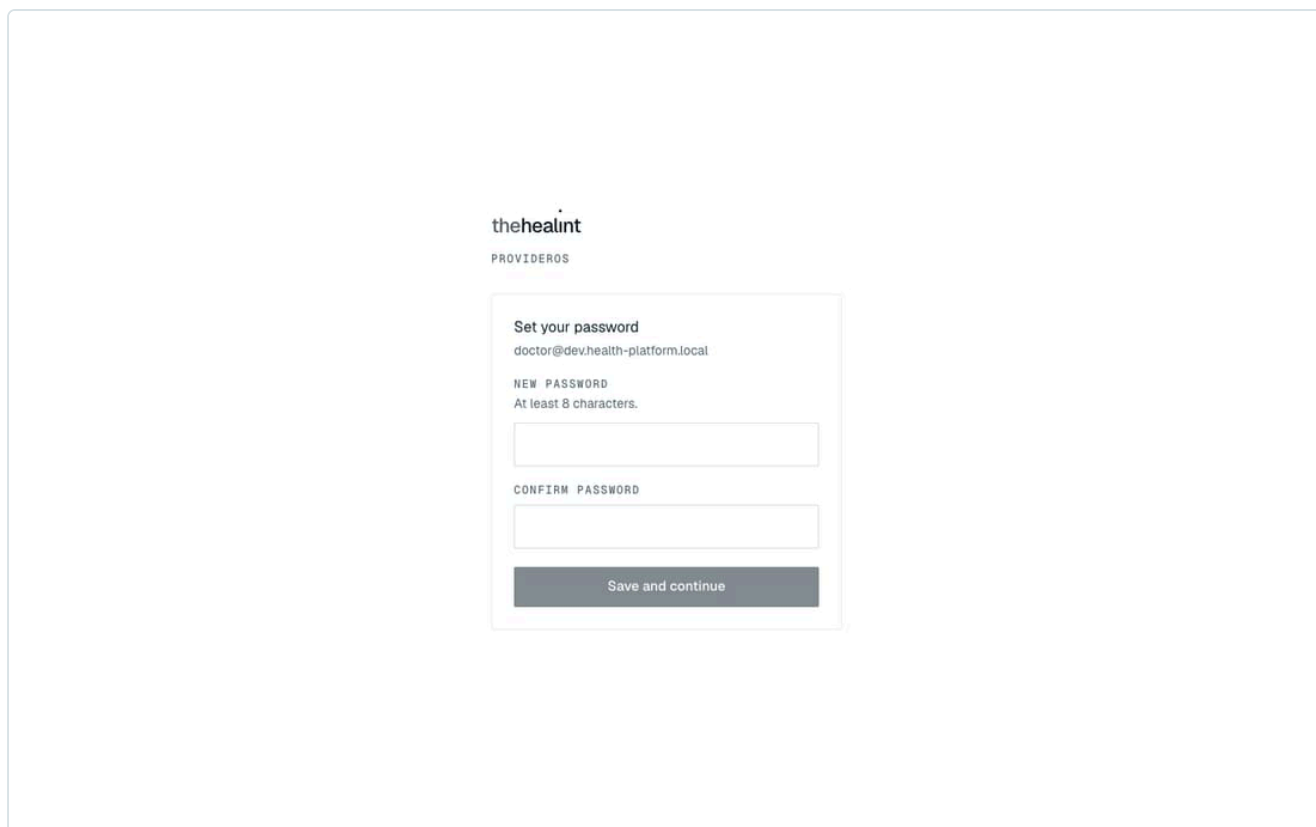
Reception at phone width.

Before you start

Your first sign-in

Your clinic admin adds you and you get an **invitation email**.

1. Click the link in the email. ProviderOS opens on **Set your password**.
2. Type a **New password** (at least 8 characters) and the same again under **Confirm password**.
3. Click **Save and continue**. You're signed in and taken to **Reception**.



The Set your password page (shown here for a doctor's account — yours shows your own email).

If it doesn't work:

- **"This link has expired"**: the link works only once. Ask your clinic admin to resend your invitation, or click **Sign in** if you've already set a password.
- If ProviderOS asks **"What should we call you?"**, type your name and click **Continue**. This happens only once.

Signing in every day

1. Open ProviderOS. Type your **Email** and **Password** and click **Sign in**.
2. If you've turned on two-factor sign-in, type the 6-digit **Authenticator code** from your phone and click **Verify**. (To turn it on: click your initials → **Security** → **Set up two-factor authentication**, then scan the QR code with an authenticator app. The steps, with pictures, are under "How to turn on two-factor sign-in" in [02-doctor.md](#).)

If it doesn't work:

- **"That email and password did not match an account..."**: check for typos. If you've forgotten your password, ask your clinic admin to resend your invitation.
- **"Too many attempts. Please wait a minute and try again."**: wait a minute.
- A red **API unreachable** label in the grey bar means ProviderOS can't reach the server. Tell your clinic admin.

How to check in a patient who has booked

When a patient with a booking arrives:

1. On **Reception**, look under **Expected today**. It lists everyone booked for today who hasn't arrived yet, with the time, the doctor and **Booked** (or **Confirmed**).

EXPECTED TODAY			
2:00 pm	Thanush Garimella Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	Booked	<button>Check in</button> <button>Reschedule</button> <button>Cancel</button>
4:45 pm	Priya Nair Dev Clinic Admin · Aarogya Family Clinic — Koramangala	Booked	<button>Check in</button> <button>Reschedule</button> <button>Cancel</button>

Two patients still expected today.

2. Click **Check in** on their row. There's no "are you sure?" — it happens straight away.
3. The patient leaves **Expected today** and appears in **Today's queue** as **Waiting**, with a token number.
Tell the patient their token number.

TODAY'S QUEUE			Live — updated 1:43 pm
#1	Rahul Verma Dev Clinic Admin	In consultation	
#1	Priya Nair Dr. Meera Iyer	Waiting	<button>Call</button>
#2	Ananya Sharma Dev Clinic Admin	Completed	
#2	Vikram Rao Dr. Meera Iyer	Completed	
#3	Vikram Rao Dr. Meera Iyer	Completed	
#4	Thanush Garimella Dr. Meera Iyer	Waiting	<button>Call</button>

Thanush Garimella is now #6, Waiting, for Dr. Meera Iyer. Token numbers count separately for each doctor, so two patients can both be #1.

Patients can also check themselves in on their phone when they arrive. They then appear in the queue on their own — no need to do anything.

If it doesn't work:

- **"Could not check {name} in."** or a message such as "Cannot check in — this appointment is CANCELLED": the booking has changed (for example the patient cancelled it). Open **Calendar** to see its status.
- The patient isn't listed under **Expected today**: they may already be checked in (look in **Today's queue**), be booked for another day, or not be booked at all — register them as a walk-in instead.
- **"Nobody is still expected today"**: everyone booked for today has arrived or been seen.

How to register a walk-in

A walk-in is someone without a booking who wants to see a doctor today. Everything happens in the **Register a walk-in** box at the top of Reception.

A patient who already has an account

1. Under **Find the patient**, type their phone number, name or patient ID (at least 2 characters), then click **Search** (or press Enter).
2. Find them in the results (name, phone and how many family members they have) and click **Select**.

The screenshot shows the 'thehealint' interface with the 'PROVIDEROS' tab selected. The 'Reception' tab is active, showing a search bar with 'Vikram' entered. Below the search bar, a result for 'Vikram Rao' is displayed with the phone number '+919900000105' and '3 dependent(s)'. A 'Select' button is next to the result. At the bottom, a message states 'Arjun Menon (Lakshmi Menon's family) added to the queue.'

Searching "Vikram" finds *Vikram Rao*, with his phone number and 3 dependent(s).

3. Go on to [Choose who the visit is for and the doctor](#).

A new patient

1. Search for them first by phone number. If nobody matches, you see **"No patient matches that"**.

The screenshot shows the 'thehealint' interface with the 'PROVIDEROS' tab selected. The 'Reception' tab is active, showing a search bar with the phone number '+919897005900' entered. Below the search bar, a message states 'No patient matches that' and 'Register them below — a walk-in still needs an account to hang the visit off.' A 'Register a new patient' button is visible. At the bottom, a message states 'No account found — register a new patient'.

No account with this phone number.

2. Click **Register a new patient** (or **No account found — register a new patient**).
3. Type their **Full name** and **Phone**. **Email** is optional.
4. Click **Register patient**. They are now the selected patient.

The screenshot shows the 'thehealint' PROVIDEROS interface. At the top, there are navigation tabs: 'Reception' (active, with a count of 2), 'Calendar', 'Patients', 'Billing', and a user profile 'RK'. Below the navigation bar, there is a search section with the label 'Phone, name or patient ID'. A search input field contains the phone number '+919897005900', and a 'Search' button is to its right. Below the search results area, a message states: 'No patient matches that. Register them below — a walk-in still needs an account to hang the visit off.' with a 'Register a new patient' button. The registration form below has three sections: 'FULL NAME' with the text 'Lakshmi Menon', 'PHONE' with the text '+919897005900', and 'EMAIL' with the label 'Optional' and an empty input field. At the bottom of the form is a dark blue 'Register patient' button.

Full name, Phone and (optional) Email, then Register patient.

If you see **"Could not register this patient — they may already have an account (search for them instead)."**, search again by their phone number or name and select them.

Choose who the visit is for and the doctor

1. Under **Who is this visit for?**, choose the account holder ("... (the account holder)") or one of their family members ("Name (Son)", "Name (Mother)" ...).
2. **The patient is a family member who isn't listed yet?** Type their name under **Add a dependent**, their **Relationship** (for example "Son"), and click **Add**. They're added and picked for you.
3. If you see a **Branch** box, choose the branch where they'll be seen.
4. Under **Practitioner**, choose the doctor.
5. Click **Add to queue**.

thehealint PROVIDEROS

Reception 2 Calendar Patients Billing RK

Lakshmi Menon Change patient

WHO IS THIS VISIT FOR?

Arjun Menon (Son)

ADD A DEPENDENT

RELATIONSHIP

Name

BRANCH

Aarogya Family Clinic — Koramangala

PRACTITIONER

Dr. Meera Iyer - ₹600

Add to queue

Lakshmi Menon has just been registered; her son Arjun Menon was added under Add a dependent and is selected. The doctor is chosen; next, Add to queue.

thehealint PROVIDEROS

Reception 3 Calendar Patients Billing RK

Vikram Rao Change patient

WHO IS THIS VISIT FOR?

Vikram Family Child (Child)

ADD A DEPENDENT

RELATIONSHIP

Name

BRANCH

Aarogya Family Clinic — Koramangala

PRACTITIONER

Dr. Meera Iyer - ₹600

Add to queue

Arjun Menon (Lakshmi Menon's family) added to the queue.

For an existing patient, pick the family member in Who is this visit for?

- You see "{name} added to the queue." — for a family member, "{child} ({parent}'s family) added to the queue." — and the box clears for the next person. The patient appears in **Today's queue** as **Waiting**.

thehealint PROVIDEROS

Reception 3 Calendar Patients Billing RK

Phone, name or patient ID

Search

No account found — register a new patient

Arjun Menon (Lakshmi Menon's family) added to the queue.

The confirmation names the account holder (Lakshmi Menon), even when the visit is for a family member.

To start again with someone else, click **Change patient**.

If it doesn't work:

- **"Could not register this walk-in — the practitioner may just have become busy, try again."**: click **Add to queue** again, or choose another doctor.
- **"Nobody practises at this branch yet"**: choose another branch.
- In **Calendar**, a family member's walk-in is listed under the account holder's name (for example "Lakshmi Menon" for her son's visit). The queue shows the family member's own name.

How to run the queue

Today's queue at the bottom of Reception shows every token for today, for every doctor. It updates by itself ("Live — updated ..."); click **Refresh** if you want to be sure.

1. When a doctor is ready, click **Call** on the next **Waiting** patient. Their status changes to **Called**.
thehealint doesn't message the patient — call out their name or token number.

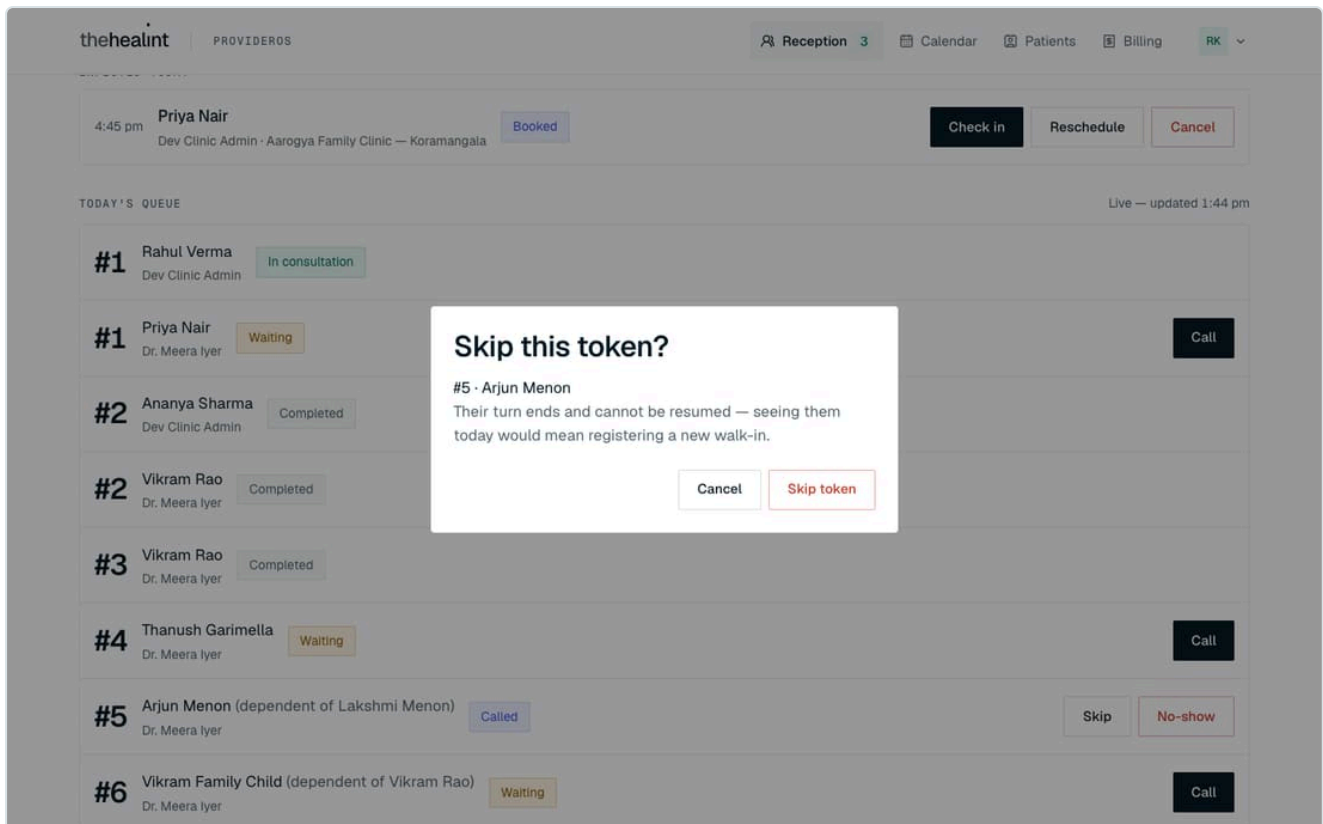
TODAY'S QUEUE			Live — updated 1:44 pm
#1	Rahul Verma Dev Clinic Admin	In consultation	
#1	Priya Nair Dr. Meera Iyer	Waiting	Call
#2	Ananya Sharma Dev Clinic Admin	Completed	
#2	Vikram Rao Dr. Meera Iyer	Completed	
#3	Vikram Rao Dr. Meera Iyer	Completed	
#4	Thanush Garimella Dr. Meera Iyer	Waiting	Call
#5	Arjun Menon (dependent of Lakshmi Menon) Dr. Meera Iyer	Called	Skip No-show
#6	Vikram Family Child (dependent of Vikram Rao) Dr. Meera Iyer	Waiting	Call

#7 Arjun Menon is Called, with Skip and No-show. The desk doesn't start consultations; the doctor does.

2. When the doctor starts the consultation, the status changes to **In consultation** by itself. When the doctor finishes, it changes to **Completed**.

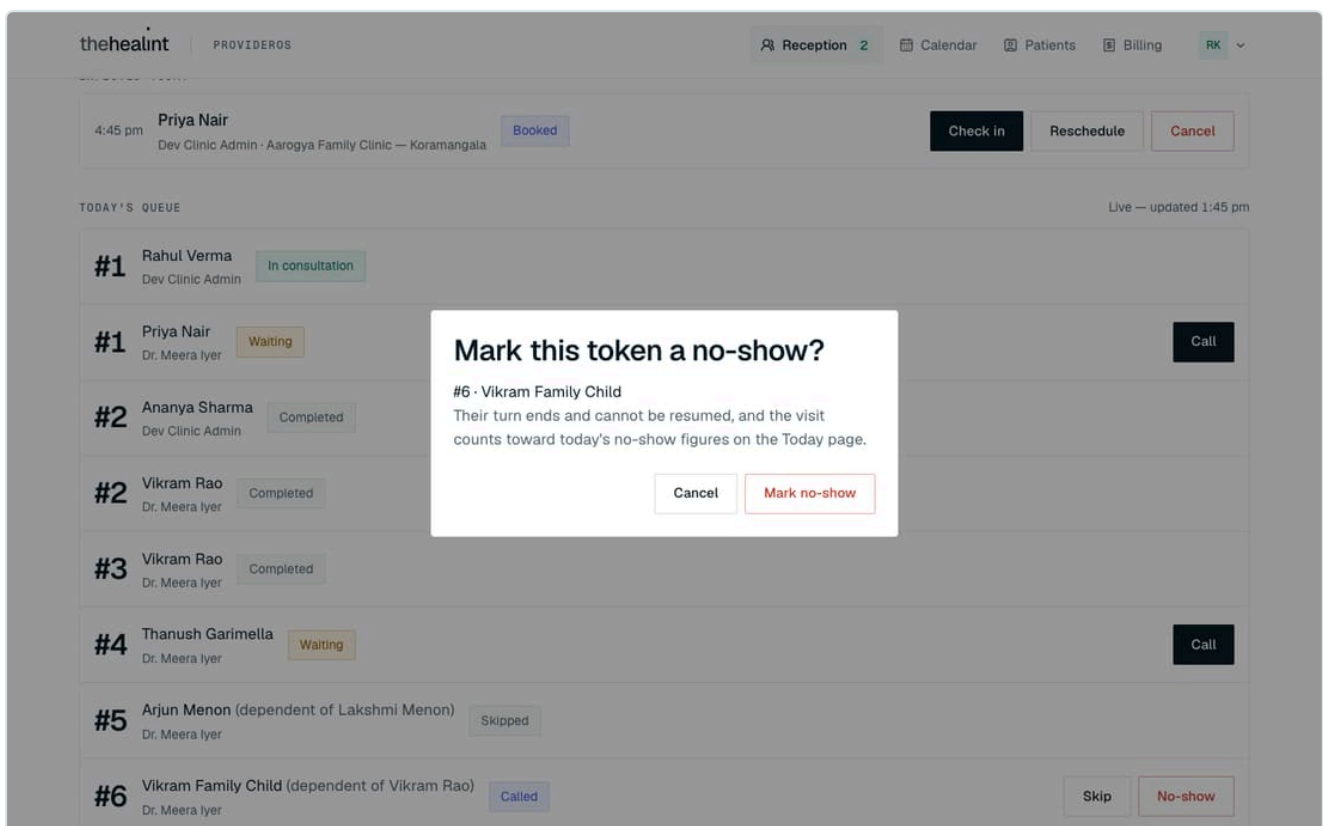
If a called patient doesn't come:

- **Skip** — for example they've stepped out. ProviderOS asks **"Skip this token?"**. Click **Skip token**.



"Their turn ends and cannot be resumed — seeing them today would mean registering a new walk-in."

- **No-show** — they've left. ProviderOS asks "Mark this token a no-show?". Click **Mark no-show**. It counts in the day's no-show figures.



The no-show check. Cancel goes back without changing anything.

TODAY'S QUEUE		Live — updated 1:45 pm	
#1	Rahul Verma Dev Clinic Admin	In consultation	
#1	Priya Nair Dr. Meera Iyer	Waiting	Call
#2	Ananya Sharma Dev Clinic Admin	Completed	
#2	Vikram Rao Dr. Meera Iyer	Completed	
#3	Vikram Rao Dr. Meera Iyer	Completed	
#4	Thanush Garimella Dr. Meera Iyer	Waiting	Call
#5	Arjun Menon (dependent of Lakshmi Menon) Dr. Meera Iyer	Skipped	
#6	Vikram Family Child (dependent of Vikram Rao) Dr. Meera Iyer	No show	

#7 is Skipped and #8 is No show.

Skip and No-show can't be undone. If the patient comes back later, register them again as a walk-in.

If it doesn't work: if the dialog stays open with an error, someone else has probably already moved that token (for example the doctor started the consultation). Click **Cancel** and look at the queue again.

How to use the calendar

1. Click **Calendar**. It opens on the **Day grid**: one column per doctor, each booking at its time, coloured by status. Choose another **Day** to move between days.

thehealint

PROVIDEROS

Reception 2

Calendar

Patients

Billing

RK

Aarogya Family Clinic

OPERATIONS

Calendar

One day at a glance — a column per doctor, each booking in its status colour. Select one to see its details and actions.

Refresh

DAY

21/10/2026

Day grid

List

Updated 1:45 pm · auto-refreshes every 20s

	Dev Clinic Admin 3 bookings	Dr. Meera Iyer 6 bookings
8 AM		
9 AM	9:00 am Ananya Sharma	
10 AM		10:00 am Vikram Rao
11 AM	11:00 am Rahul Verma	11:20 am Priya Nair

Day grid for today: Dev Clinic Admin (3 bookings) and Dr. Meera Iyer (8 bookings). Bookings at the same time sit side by side.

- Click **List** to see one row per booking for the **From** date and the next six days, grouped by day. **Booked** and **Confirmed** rows have **Reschedule** and **Cancel**; today's also have **Check in**.

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PROVIDEROS

Reception 2

Calendar

Patients

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Aarogya Family Clinic

OPERATIONS

Calendar

The full appointment list — one row per booking, for the selected date and the following six days. Use the branch selector to narrow it. For the organization's daily summary numbers instead, use Today.

Refresh

FROM

21/10/2026

Day grid

List

Updated 1:45 pm · auto-refreshes every 20s

TODAY · 21 OCT 2026 · 9

9:00 am	Ananya Sharma Dev Clinic Admin · Aarogya Family Clinic — Koramangala	Completed
10:00 am	Vikram Rao Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	Completed
11:00 am	Rahul Verma Dev Clinic Admin · Aarogya Family Clinic — Koramangala	In consultation
11:20 am	Priya Nair Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	In queue
2:00 pm	Thanush Garimella Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	In queue

List view, grouped by day, with each booking's status.

The calendar refreshes itself every 20 seconds ("Updated ... · auto-refreshes every 20s").

3. Click a patient's name (or a block on the grid) to open the booking. You see its status, how it was booked, the doctor, branch and fee, and its **History**. The buttons at the bottom are **Check in** (today only), **Reschedule** and **Cancel**. Close it with x.

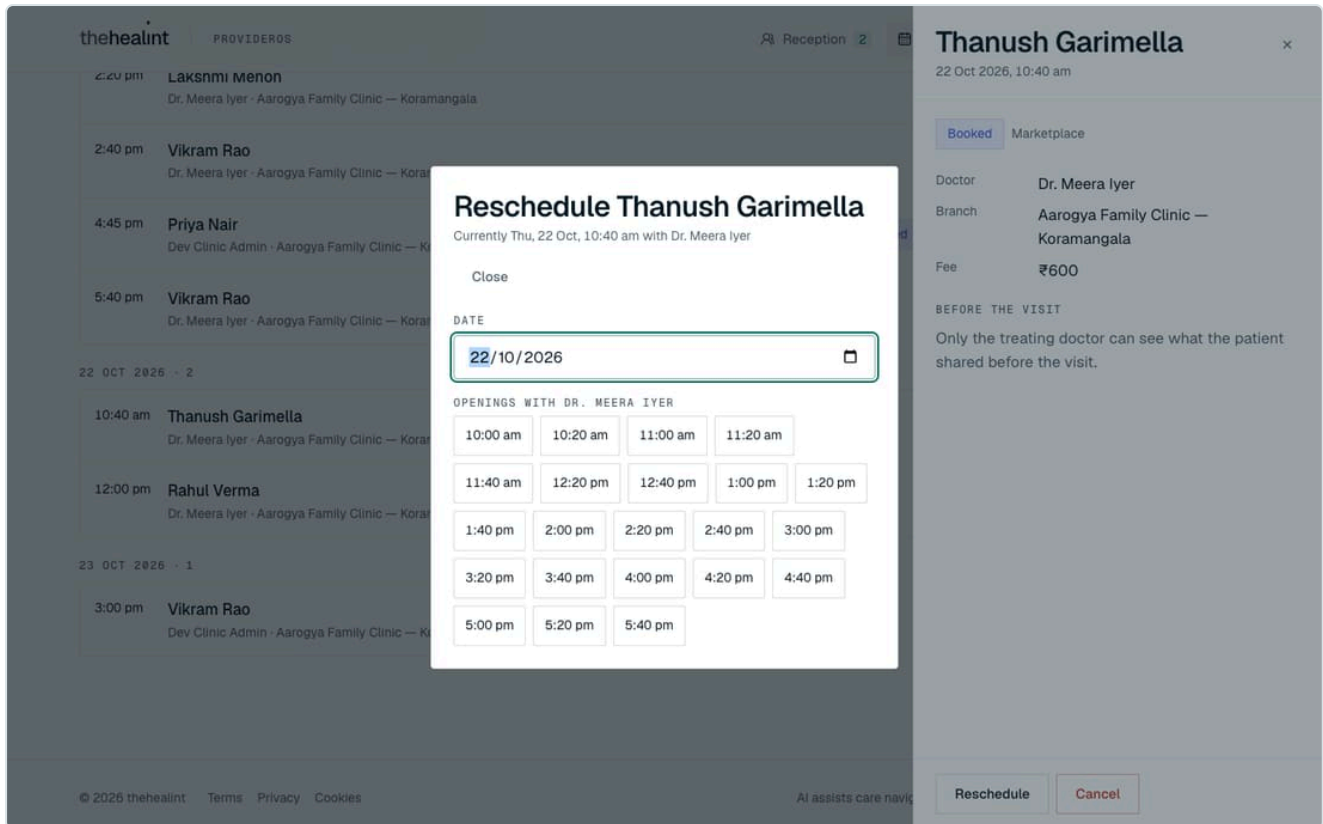
The screenshot shows the 'thehealint' interface. On the left is a calendar view grouped by day. The current day is 22 OCT 2026, showing three bookings: Laksnmi Menon at 2:20 pm, Vikram Rao at 2:40 pm, and Priya Nair at 4:45 pm. The next day, 23 OCT 2026, shows one booking: Vikram Rao at 3:00 pm. On the right is a detailed view of a booking for 'Thanush Garimella' on 22 Oct 2026 at 10:40 am. The booking status is 'Booked'. The doctor is 'Dr. Meera Iyer' and the branch is 'Aarogya Family Clinic — Koramangala'. The fee is ₹600. Below this, it says 'BEFORE THE VISIT' and 'Only the treating doctor can see what the patient shared before the visit.' At the bottom of the details panel are 'Reschedule' and 'Cancel' buttons. The footer of the interface includes '© 2026 thehealint', 'Terms', 'Privacy', 'Cookies', and 'AI assists care navig'.

A booking for tomorrow. Before the visit says "Only the treating doctor can see what the patient shared before the visit." — that is private to the doctor.

Statuses you'll see: Held, Booked, Confirmed, Checked in, In queue, In consultation, Completed, Cancelled, Expired, Rescheduled, No show.

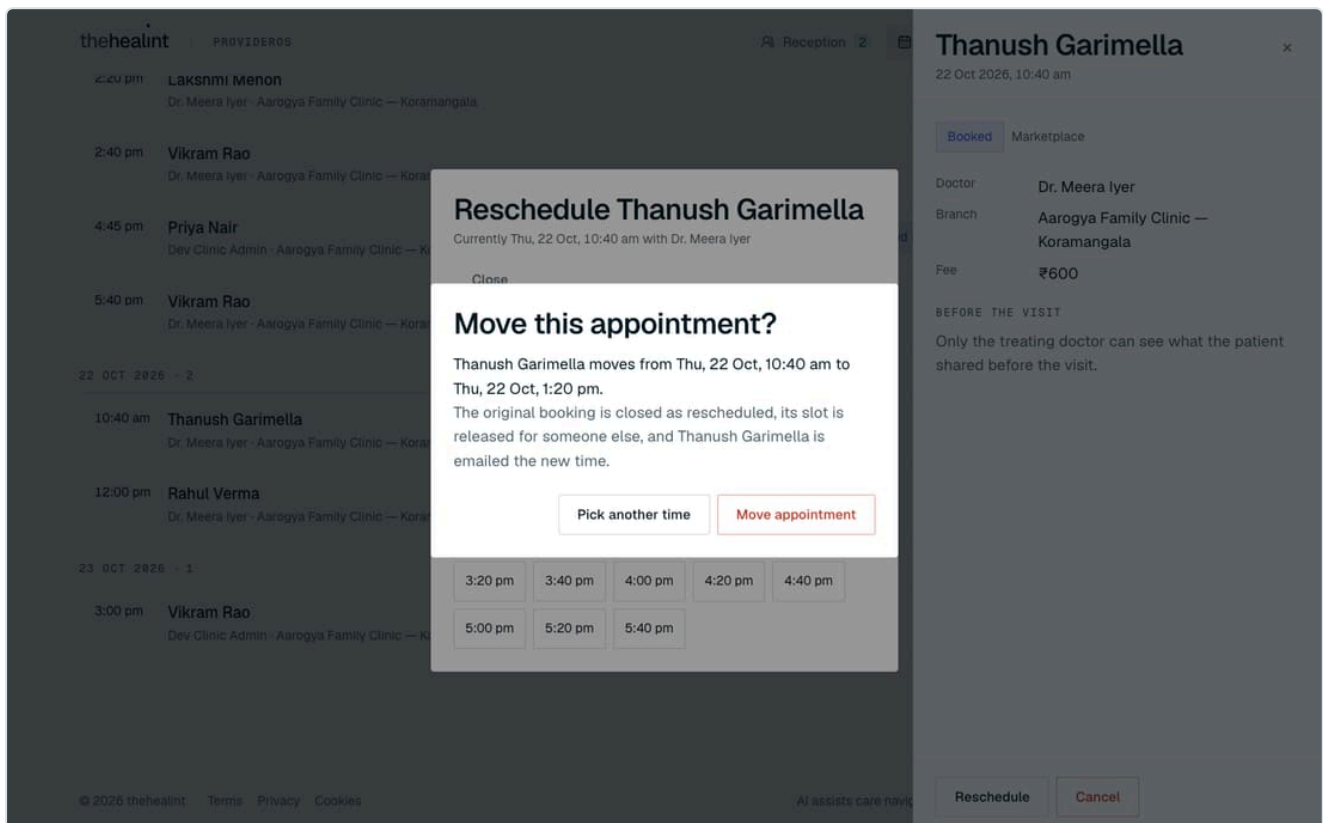
How to move a booking for a patient on the phone

1. Find the booking in **Calendar** (or the patient's page under **Patients**) and click **Reschedule** — on the row, or in the booking's details.
2. The **Reschedule {patient}** box opens, showing the current time and doctor. Pick a **Date**.
3. Free times with the same doctor appear under **Openings with {doctor}**. Click the time the patient wants.



Free times with Dr. Meera Iyer on the chosen date.

- ProviderOS asks **"Move this appointment?"**, showing the old and new times. Click **Move appointment** (or **Pick another time**).



Thanush Garimella moves from 10:40 am to 1:20 pm. He is emailed the new time.

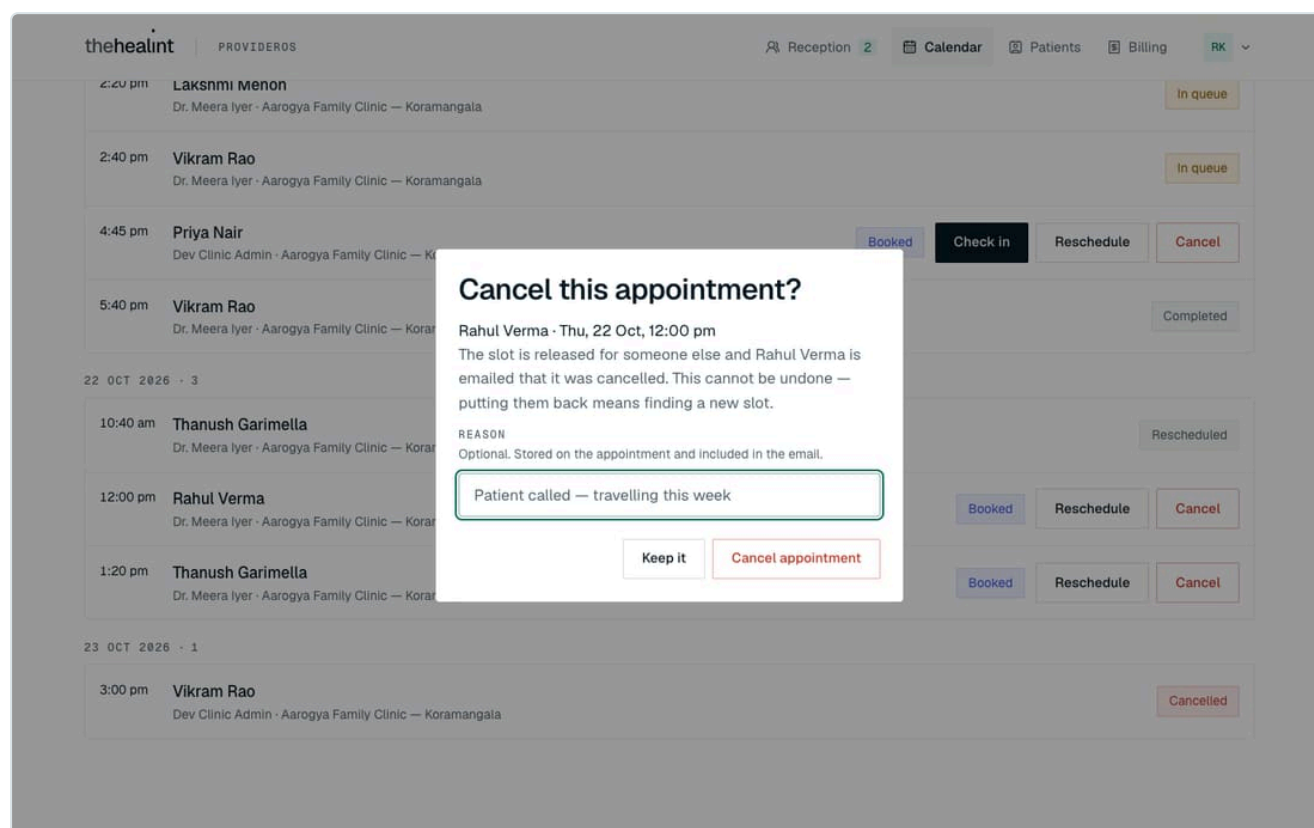
5. The old booking shows **Rescheduled** and a new **Booked** one appears at the new time. The patient gets an email with the new time.

If it doesn't work:

- **"No openings on this date"**: the doctor doesn't work that day or is fully booked. Try another date.
- Someone took the time first: ProviderOS shows the error and a few other times under **Still free right now**. Pick one of those.
- You can only move a booking to the **same doctor at the same branch**. To change doctor, cancel the booking and ask the patient to book again (or register them as a walk-in if they're coming today).

How to cancel a booking

1. Click **Cancel** on the booking (in Calendar, on the patient's page, or in Expected today).
2. ProviderOS asks **"Cancel this appointment?"**. Type a **Reason** if you have one — it's saved and included in the email to the patient.
3. Click **Cancel appointment** (or **Keep it** to leave the booking alone).



Cancelling Rahul Verma's booking for tomorrow, with a reason.

4. The booking shows **Cancelled** and the patient is emailed.

thehealint

PROVIDERS

Reception2

Calendar

Patients

Billing

RK

2:20 pm

Lakshmi Menon

Dr. Meera Iyer · Aarogya Family Clinic — Koramangala

In queue

2:40 pm

Vikram Rao

Dr. Meera Iyer · Aarogya Family Clinic — Koramangala

In queue

4:45 pm

Priya Nair

Dev Clinic Admin · Aarogya Family Clinic — Koramangala

Booked

Check in

Reschedule

Cancel

5:40 pm

Vikram Rao

Dr. Meera Iyer · Aarogya Family Clinic — Koramangala

Completed

22 OCT 2026 · 3

10:40 am

Thanush Garimella

Dr. Meera Iyer · Aarogya Family Clinic — Koramangala

Rescheduled

12:00 pm

Rahul Verma

Dr. Meera Iyer · Aarogya Family Clinic — Koramangala

Cancelled

1:20 pm

Thanush Garimella

Dr. Meera Iyer · Aarogya Family Clinic — Koramangala

Booked

Reschedule

Cancel

23 OCT 2026 · 1

3:00 pm

Vikram Rao

Dev Clinic Admin · Aarogya Family Clinic — Koramangala

Cancelled

Tomorrow: the moved booking shows Rescheduled with the new 1:20 pm booking below it, and Rahul Verma's booking is Cancelled.

Cancelling can't be undone. To put the patient back, they need a new booking.

Only **Booked** and **Confirmed** bookings can be moved or cancelled.

How to look up a patient

1. Click **Patients**. You see everyone who has booked with your clinic, with their number of bookings and their next and last booking.
2. Type in **Search by name** to narrow the list. (The list shows up to 200 people; search to find anyone else.)

thehealint

PROVIDEROS

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Aarogya Family Clinic

OPERATIONS

Patients

Everyone who has booked with your organization. Open a patient to see every booking they've had here.

SEARCH BY NAME

Start typing a name

VR	Vikram Rao 4 bookings	Next 21 Oct 2026 Last booking 21 Oct 2026
TG	Thanush Garimella 5 bookings	Next 21 Oct 2026 Last booking 17 Oct 2026
RV	Rahul Verma 2 bookings	Last booking 21 Oct 2026
PN	Priya Nair 2 bookings	Next 21 Oct 2026 Last booking 21 Oct 2026
LM	Lakshmi Menon 1 booking	Next 21 Oct 2026
AS	Ananya Sharma 1 booking	Last booking 21 Oct 2026

The patients directory. Only names are shown — no phone numbers or emails.

- Click a patient to see **Bookings**, **Completed visits** and **Last completed**, then their **Upcoming** and **History** visits. Click any visit to open it, with **Check in**, **Reschedule** and **Cancel** where allowed.

thehealint

PROVIDEROS

Reception 2

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Aarogya Family Clinic

[← All patients](#)

PATIENT

Thanush Garimella

Every booking this patient has had with your organization. Open one for its history and actions.

BOOKINGS

5

COMPLETED VISITS

2

LAST COMPLETED

17 Oct 2026

UPCOMING

21 Oct 2026 · 2:00 pm Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	In queue
22 Oct 2026 · 1:20 pm Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	Booked

HISTORY

22 Oct 2026 · 10:40 am Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	Rescheduled
17 Oct 2026 · 10:00 am Dr. Meera Iyer · Aarogya Family Clinic — Koramangala	Completed

Thanush Garimella: one visit in the queue today, one booked for tomorrow, and his history.

Need a phone number? Use **Find the patient** in Register a walk-in on Reception — the search results show it.

How to take payment and give discounts

Click **Billing**. It shows one day at a time — today, unless you change the **Date**.

thehealint PROVIDEROS Reception 2 Calendar Patients **Billing** RK

Aarogya Family Clinic

OPERATIONS

Billing

What was invoiced, what was collected, and what is still owed.

DATE

21/10/2026

INVOICES	BILLED	COLLECTED	OUTSTANDING
4	₹2,200.00	₹0.00	₹2,200.00

INVOICES

PATIENT · INVOICE	STATUS	TOTAL	BALANCE	
Priya Nair INV-MVHU4HSP-01a15d85	Issued	₹500.00	₹500.00	<button>Record collection</button> Discount
Ananya Sharma INV-MVHU4C1F-01a15d84	Issued	₹500.00	₹500.00	Discount
Vikram Rao INV-MVHU4AFP-01a15d84	Issued	₹600.00	₹600.00	Discount
Vikram Rao INV-MVHU46FE-01a15d84	Issued	₹600.00	₹600.00	Discount

Billing for today: 6 invoices, ₹3400 billed, nothing collected yet. The first invoice is waiting for payment at the counter.

At the top are the day's totals: **Invoices**, **Billed**, **Collected** and **Outstanding**. Under them, a line shows how the money came in (for example "At the counter: ₹500.00").

Each invoice shows its number, status (**Draft**, **Issued**, **Paid** or **Void**), **Total** and **Balance** (in red when money is owed, or **Paid**).

Each row shows who the bill is for — the patient, or the family member and the account holder in brackets — with the invoice number underneath.

Record a payment at the counter

Record collection appears on invoices where the patient chose to **pay at the clinic** and hasn't paid yet.

1. Take the money first.
2. Click **Record collection** on the invoice.

3. ProviderOS asks "**Record this payment as collected?**" with the amount. Click **Yes, money received** (or **Not yet**).

The screenshot shows the 'thehealint' ProviderOS interface for 'Aarogya Family Clinic'. The 'Billing' section is active, displaying a date of 21/10/2026. A modal dialog titled 'Record this payment as collected?' is centered on the screen. The dialog text states: 'Confirms that ₹500.00 was taken at the counter for INV-MVHU4HSP-01a15d85. The invoice is settled and the amount counts toward today's collections. Recording this by mistake can only be undone with a refund, so take the money first.' Below the text are two buttons: 'Not yet' and 'Yes, money received'. In the background, a table of invoices is visible, including one for Priya Nair and others for Ananya Sharma and Vikram Rao.

Confirming ₹500.00 was taken at the counter.

4. The invoice shows **Paid** and the amount is added to **Collected**. The patient is emailed to say the payment was received.

A payment recorded by mistake can only be undone with a refund, and refunds can't be made from this screen — ask your clinic admin. Always take the money before you click.

If an invoice has money owing but **no Record collection** button, the patient didn't choose pay-at-the-clinic (for example a consultation invoice, or an online payment not yet cleared). This screen can't record cash against it — tell your clinic admin.

Give a discount

1. Click **Discount** on the invoice.
2. A box opens under the list. Type the **Amount** in rupees and a **Reason** (it's kept with the invoice).
3. Click **Apply discount**.

The screenshot shows a form titled 'DISCOUNT - INV-MVHU4AFP-01A15D84'. It has two main sections: 'AMOUNT' and 'REASON'. The 'AMOUNT' section has a label 'In rupees' and a text input field containing '100'. The 'REASON' section has a label 'Recorded against the invoice for audit' and a text input field containing 'Second visit this week — courtesy discount'. At the bottom right of the form are two buttons: 'Apply discount' and 'Cancel'.

₹100 off, with the reason.

4. ProviderOS asks **"Apply this discount?"**, showing what will be left to pay. Click **Apply discount**.

thehealint

PROVIDEROS

Reception 2

Calendar

Patients

Billing

RK

What was invoiced, what was collected, and what is still owed.

DATE

21/10/2026

INVOICES

4

BILLED

₹2,200.00

COLLECTED

₹500.00

OUTSTANDING

₹1,700.00

At the counter: ₹500.00

INVOICES

PATIENT	INVOICE				
Priya Nair	INV-MVHU4HSP-01a15d85				Discount
Ananya Sharma	INV-MVHU4C1F-01a15d84				Discount
Vikram Rao	INV-MVHU4AFP-01a15d84	Issued	₹600.00	₹600.00	Discount
Vikram Rao	INV-MVHU46FE-01a15d84	Issued	₹600.00	₹600.00	Discount

DISCOUNT - INV-MVHU4AFP-01a15d84

AMOUNT	REASON		
In rupees	Recorded against the invoice for audit		
100	Second visit this week — courtesy discount	Apply discount	Cancel

Apply this discount?

₹100.00 comes off INV-MVHU4AFP-01a15d84, leaving ₹500.00 due. Discounts are recorded permanently and cannot be reversed from here.

Cancel

Apply discount

"₹100.00 comes off INV-..., leaving ₹500.00 due."

5. The invoice total and balance go down, and so does **Billed** for the day.

thehealint

PROVIDEROS

Reception 2

Calendar

Patients

Billing

RK

Aarogya Family Clinic

OPERATIONS

Billing

What was invoiced, what was collected, and what is still owed.

DATE

21/10/2026

INVOICES

4

BILLED

₹2,100.00

COLLECTED

₹500.00

OUTSTANDING

₹1,600.00

At the counter: ₹500.00

INVOICES

PATIENT · INVOICE	STATUS	TOTAL	BALANCE	
Priya Nair INV-MVHU4HSP-01a15d85	Paid	₹500.00	Paid	Discount
Ananya Sharma INV-MVHU4C1F-01a15d84	Issued	₹500.00	₹500.00	Discount
Vikram Rao INV-MVHU4AFP-01a15d84	Issued	₹500.00	₹500.00	Discount
Vikram Rao INV-MVHU46FE-01a15d84	Issued	₹600.00	₹600.00	Discount

After both tasks: Collected ₹500, the collected invoice Paid, the discounted one now ₹500.

Discounts are permanent and can't be reversed from here. Double-check the amount.

If it doesn't work:

- **"Enter a valid discount amount.":** type a number, without the ₹ sign.
- **"Give a reason for the discount.":** the reason can't be blank.
- Click **Cancel** to close the discount box without saving.

Billing covers the **whole clinic**, every branch, whatever branch is selected at the top.

On iPhone

If you sign in to the thehealint app on an iPhone with your work account, you get a read-only **Calendar** tab (pick a date and branch). Checking in, walk-ins, the queue and billing are only in ProviderOS in a browser.

Today, times and fees follow your clinic

"Today" in Reception, Calendar and the queue is today where **your clinic** is, and a patient can check in only on their booking's day on the clinic's calendar. Times are shown on the clinic's clock and fees in the clinic's currency, whatever your computer's own settings are. If a clinic works in another country, a platform administrator sets its region once; the screens then follow it.

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

If you open a screen that isn't part of your job, ProviderOS shows **"Not part of your role"** with a **Go to your work** button.

You want to...	Who does it
Start a consultation, or read a patient's symptoms and clinical notes	The doctor — 02-doctor.md
Book a patient for a future day	The patient books in the thehealint app or website. ProviderOS can add walk-ins for today only
Move a booking to a different doctor or branch	Cancel it and have the patient book again
Put a skipped or no-show patient back in the queue	Register them again as a walk-in
Refund a payment, or void an invoice	Your clinic admin — 05-clinic-admin.md
Record cash for an invoice without a Record collection button	Your clinic admin
Change doctors' hours, add staff, see the day's summary on Today	Your clinic admin — 05-clinic-admin.md

Quick reference

Task	Where	Click
Check in a booked patient	Reception → Expected today	Check in
Find a patient for a walk-in	Reception → Register a walk-in	type → Search → Select
Register a new patient	Reception → Register a walk-in	Register a new patient → Register patient
Add a family member	Register a walk-in, after selecting	Add a dependent → Add
Put a walk-in in the queue	Register a walk-in	choose doctor → Add to queue
Call the next patient	Reception → Today's queue	Call
Patient didn't come	Today's queue, Called row	Skip → Skip token , or No-show → Mark no-show
See every doctor's day	Calendar	Day grid
See the next seven days	Calendar	List
Move a booking	Calendar (or the booking)	Reschedule → time → Move appointment
Cancel a booking	Calendar (or the booking)	Cancel → Cancel appointment
Look up a patient	Patients	Search by name
Record a counter payment	Billing	Record collection → Yes, money received
Give a discount	Billing	Discount → Apply discount → Apply discount

Task	Where	Click
Check the day's money	Billing	the four totals at the top