

# Runbook: Nurse and Billing staff

## Who this is for

This guide is for two roles at a clinic or hospital on thehealint:

- **Nurses**, who call patients from the queue when the doctor is ready, and mark patients who don't turn up.
- **Billing staff**, who look after the day's invoices: recording payments taken at the counter, giving discounts and checking the day's totals.

Both work in **ProviderOS**, in a web browser, and each sees only their own screen. Part 1 is for nurses, Part 2 for billing staff. "Before you start" applies to both.

## What you'll see

| Role    | Menu                                  | Opens on  |
|---------|---------------------------------------|-----------|
| Nurse   | <b>Reception</b> only (today's queue) | Reception |
| Billing | <b>Billing</b> only                   | Billing   |

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.

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PROVIDEROS

Reception 3

SR

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OPERATIONS

### Reception

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

Refresh

TODAY'S QUEUE

Live — updated 1:46 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

A nurse's ProviderOS: the only menu item is **Reception** (3 waiting). The page has just Today's queue — no walk-in form and no list of expected arrivals.

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OPERATIONS

## Billing

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

DATE

21/10/2026

INVOICES

5

BILLED

₹2,600.00

COLLECTED

₹500.00

OUTSTANDING

₹2,100.00

At the counter: ₹500.00

INVOICES

| PATIENT · INVOICE                      | STATUS | TOTAL   | BALANCE |                                       |
|----------------------------------------|--------|---------|---------|---------------------------------------|
| Ananya Sharma<br>INV-MVHU8FNK-01a15d88 | Issued | ₹500.00 | ₹500.00 | <div>Record collection</div> Discount |
| Priya Nair<br>INV-MVHU4HSP-01a15d85    | Paid   | ₹500.00 | Paid    | Discount                              |
| Ananya Sharma<br>INV-MVHU4C1F-01a15d84 | Issued | ₹500.00 | ₹500.00 | Discount                              |
| Vikram Rao<br>INV-MVHU4AFP-01a15d84    | Issued | ₹500.00 | ₹500.00 | Discount                              |
| Vikram Rao<br>INV-MVHU4AFP-01a15d84    | Issued | ₹600.00 | ₹600.00 | Discount                              |

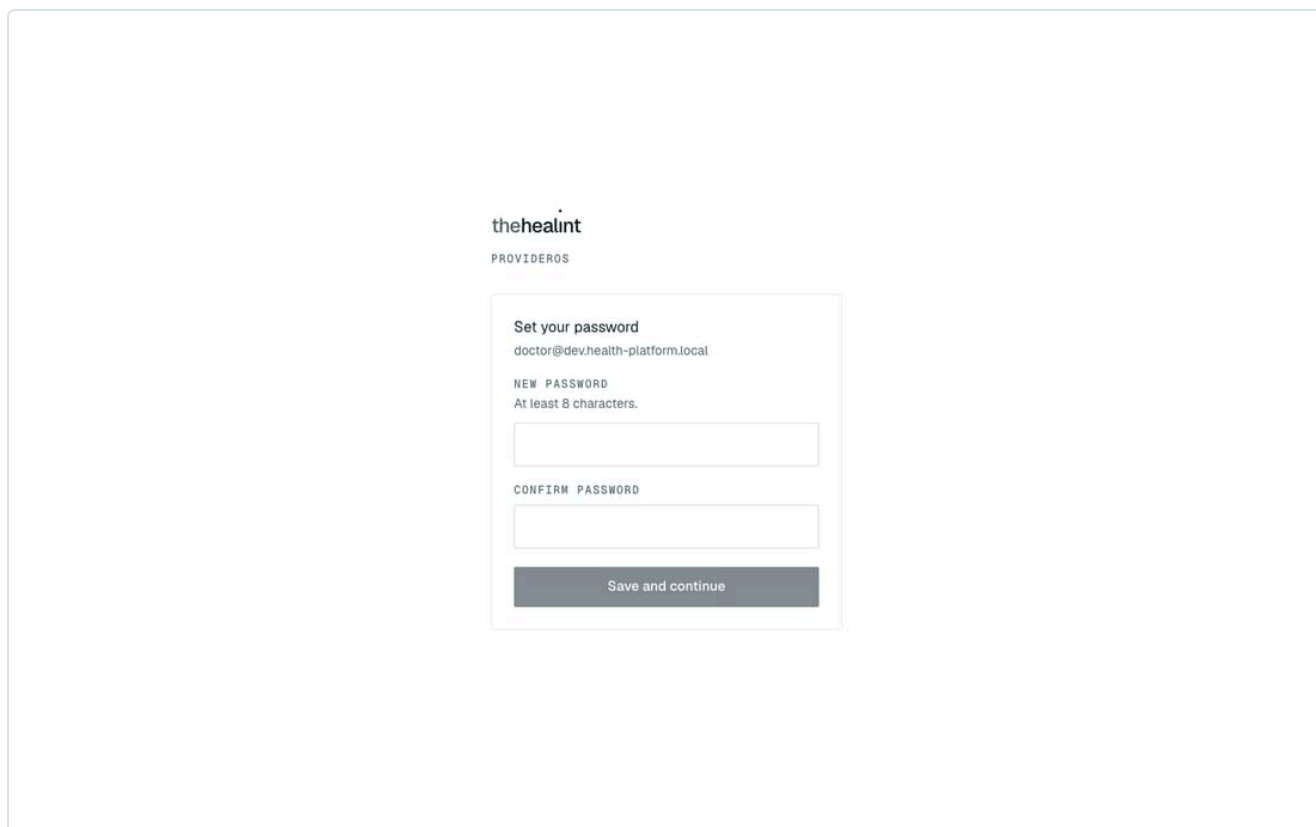
Billing staff's ProviderOS: the only menu item is **Billing**.

## 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 your screen.



*The Set your password page (shown for another 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 it, 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 (step-by-step 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, or ask your clinic admin to resend your invitation.
- **"Too many attempts. Please wait a minute and try again."**: wait a minute.

## Part 1 — Nurse

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### How to see who's waiting

1. Click **Reception**. **Today's queue** lists every patient checked in today, for every doctor: token number, patient, doctor and status.
2. It updates by itself ("Live — updated ..."). Click **Refresh** if you want to be sure.
3. The number beside **Reception** in the menu is how many patients are **Waiting**.

| Status            | Meaning                           |
|-------------------|-----------------------------------|
| Waiting           | Checked in, waiting to be called. |
| Called            | Called to go in.                  |
| In consultation   | With the doctor now.              |
| Completed         | Visit finished.                   |
| Skipped / No show | Their turn ended without a visit. |

Token numbers count separately for each doctor, so two patients can both be #1 — check the doctor's name under the patient.

If it says "**Nobody is in today's queue yet**", nobody has been checked in yet. Patients appear as soon as the front desk checks them in, or they check in on their phone.

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## Reception

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

Refresh

TODAY'S QUEUE
Live — updated 1:46 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

The queue at phone width.

## How to call the next patient

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

#7
Rahul Verma
Dr. Meera Iyer

Called

Skip

No-show

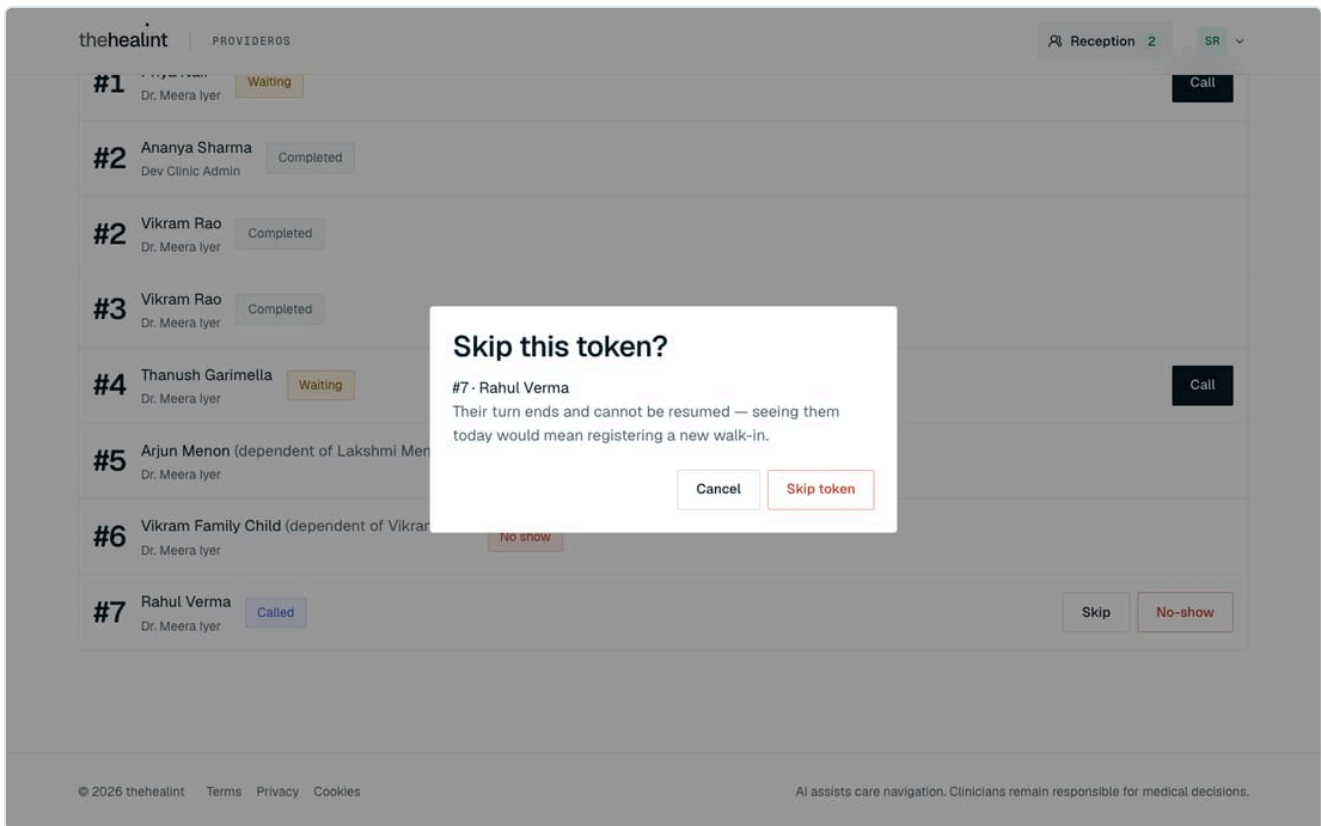
#9 Rahul Verma is Called, with Skip and No-show.

3. The doctor starts the consultation from their own screen. The status then changes to **In consultation**, and to **Completed** when the doctor finishes. You don't need to do anything.

## How to skip a patient or mark a no-show

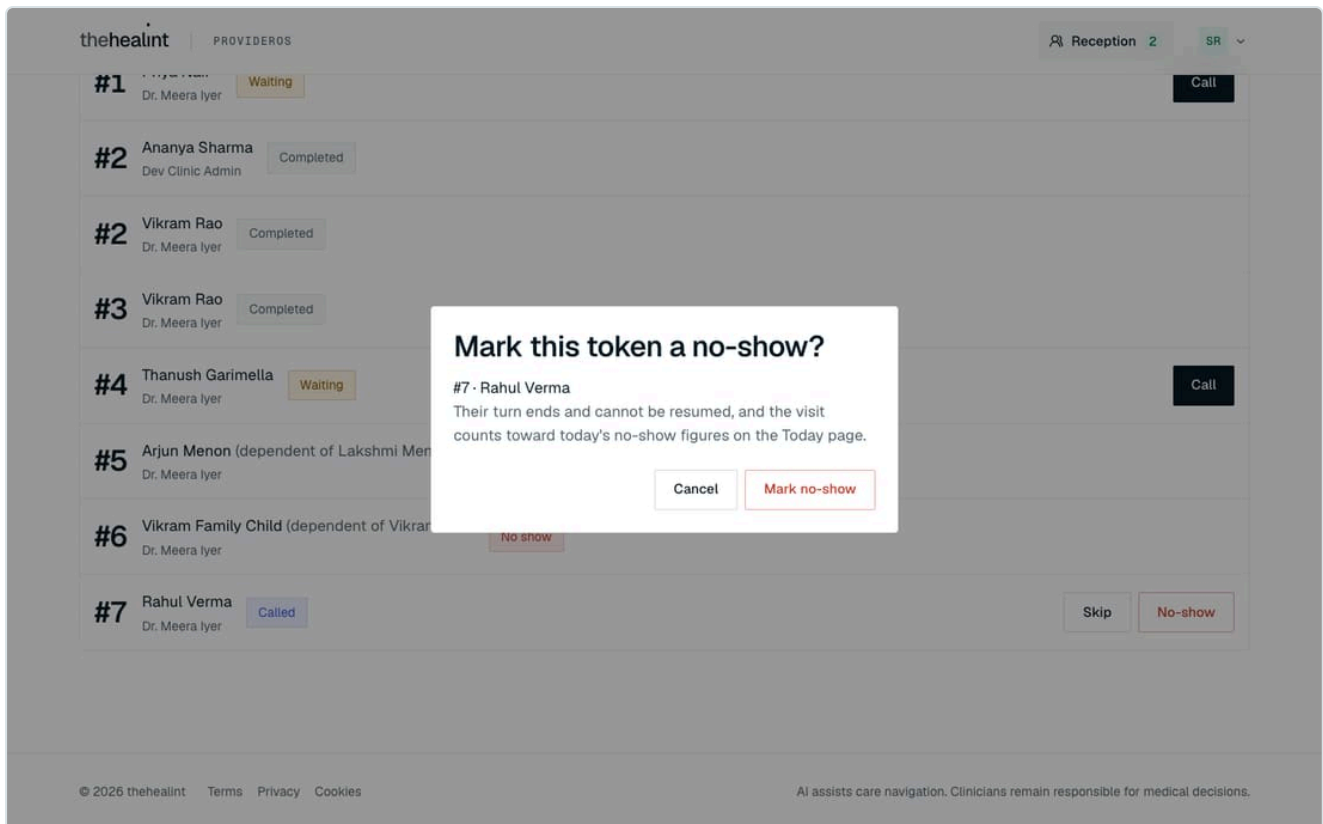
If a called patient doesn't come in:

1. **Skip** — for example they've stepped out. ProviderOS asks **"Skip this token?"**. Click **Skip token**, or **Cancel** to go back.



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

2. **No-show** — they've left. ProviderOS asks **"Mark this token a no-show?"**. Click **Mark no-show**, or **Cancel**.



*The no-show check. It counts in the clinic's no-show figures for the day.*

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

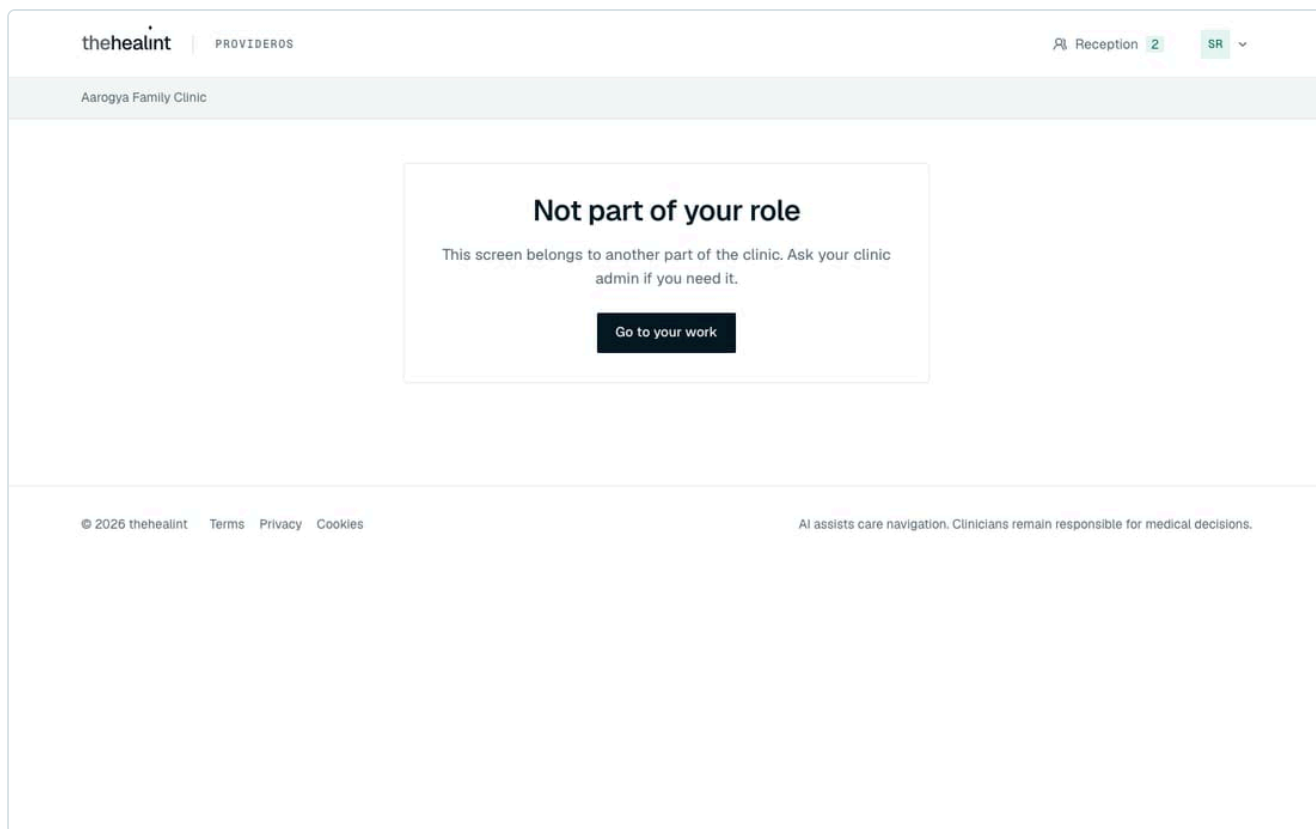
If the dialog stays open with an error, someone else has probably already moved that token (for example the doctor has started the consultation). Click **Cancel** and look at the queue again.

## What a nurse doesn't see

You see the queue only. You **can't**:

- check in booked patients, register walk-ins, or see who is still expected today — the front desk does that ([03-front-desk.md](#));
- open the calendar or the patients list;
- start or open a consultation, or read clinical notes — that's the doctor ([02-doctor.md](#));
- see billing.

If you open one of those screens (for example from a bookmark), ProviderOS shows **"Not part of your role"**. Click **Go to your work** to go back to the queue.



*What a nurse sees on the Calendar address.*

## Part 2 — Billing staff

### How to read the day's billing

1. Click **Billing** (you start there after signing in). It shows **today** unless you change the **Date**.
2. At the top are the day's totals:

| Total              | Meaning                                |
|--------------------|----------------------------------------|
| <b>Invoices</b>    | How many invoices were raised that day |
| <b>Billed</b>      | What they add up to (after discounts)  |
| <b>Collected</b>   | Money received                         |
| <b>Outstanding</b> | Money still owed                       |

3. Under the totals, a line shows how the money came in, for example "At the counter: ₹1000.00" or "Online: ₹...".
4. The **Invoices** list shows each invoice's 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.

The totals cover the **whole clinic**, every branch.

## How to look at another day

1. Change the **Date** at the top.
2. The totals and the list change to that day. A day with nothing shows **"No invoices on this day"**.

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### Billing

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

DATE

20/10/2026

| INVOICES | BILLED | COLLECTED | OUTSTANDING |
|----------|--------|-----------|-------------|
| 0        | ₹0.00  | ₹0.00     | ₹0.00       |

INVOICES

No invoices on this day

An invoice is raised when a consultation is billed, so a quiet day here is a quiet day at the counter.

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

*Yesterday: no invoices.*

## How to record a payment taken 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 and invoice number. Click **Yes, money received** (or **Not yet**).

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Billing

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

DATE

21/10/2026

INVOICES

5

BILLED

₹2,600.00

OUTSTANDING

₹2,100.00

At the counter: ₹500.00

INVOICES

| PATIENT · INVOICE                      | STATUS | TOTAL   | BALANCE |                           |
|----------------------------------------|--------|---------|---------|---------------------------|
| Ananya Sharma<br>INV-MVHU8FNK-01a15d88 | Issued | ₹500.00 | ₹500.00 | Record collectionDiscount |
| Priya Nair<br>INV-MVHU4HSP-01a15d85    | Paid   | ₹500.00 | Paid    | Discount                  |
| Ananya Sharma<br>INV-MVHU4C1F-01a15d84 | Issued | ₹500.00 | ₹500.00 | Discount                  |
| Vikram Rao<br>INV-MVHU4AFP-01a15d84    | Issued | ₹500.00 | ₹500.00 | Discount                  |
| Vikram Rao<br>INV-MVHU4AFP-01a15d84    | Issued | ₹600.00 | ₹600.00 | Discount                  |

Record this payment as collected?

Confirms that ₹500.00 was taken at the counter for INV-MVHU8FNK-01a15d88. 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.

Not yet

Yes, money received

Confirming ₹500.00 was taken at the counter for this invoice.

4. The invoice shows **Paid**, and **Collected** goes up. The patient is emailed to say the payment was received.

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Billing

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

DATE

21/10/2026

INVOICES

5

BILLED

₹2,600.00

COLLECTED

₹1,000.00

OUTSTANDING

₹1,600.00

At the counter: ₹1,000.00

INVOICES

| PATIENT · INVOICE                      | STATUS | TOTAL   | BALANCE |          |
|----------------------------------------|--------|---------|---------|----------|
| Ananya Sharma<br>INV-MVHU8FNK-01a15d88 | Paid   | ₹500.00 | Paid    | Discount |
| Priya Nair<br>INV-MVHU4HSP-01a15d85    | Paid   | ₹500.00 | Paid    | Discount |
| Ananya Sharma<br>INV-MVHU4C1F-01a15d84 | Issued | ₹500.00 | ₹500.00 | Discount |
| Vikram Rao<br>INV-MVHU4AFP-01a15d84    | Issued | ₹500.00 | ₹500.00 | Discount |
| Vikram Rao<br>INV-MVHU4AFP-01a15d84    | Issued | ₹600.00 | ₹600.00 | Discount |

Collected is now ₹1000.00 and the first invoice is Paid.

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.

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 that hasn't cleared). You can't record cash against it here — tell your clinic admin.

## How to 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**.

DISCOUNT - INV-MVHU46FE-01A15D84

AMOUNT  
In rupees

REASON  
Recorded against the invoice for audit

50

Staff family member — clinic policy

Apply discount

Cancel

*₹50 off, with the reason.*

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

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21/10/2026

INVOICES  
5

BILLED  
₹2,600.00

COLLECTED  
₹1,000.00

OUTSTANDING  
₹1,600.00

At the counter: ₹1,000.00

INVOICES

PATIENT · INVOICE

Ananya Sharma  
INV-MVHU8FNK-01a15d88

Priya Nair  
INV-MVHU4HSP-01a15d85

Ananya Sharma  
INV-MVHU4C1F-01a15d84

Vikram Rao  
INV-MVHU4AFP-01a15d84

Vikram Rao  
INV-MVHU46FE-01a15d84

Discount

Discount

Discount

Discount

Discount

DISCOUNT - INV-MVHU46FE-01A15D84

AMOUNT  
In rupees

REASON  
Recorded against the invoice for audit

50

Staff family member — clinic policy

Apply discount

Cancel

*"₹50.00 comes off INV-..., leaving ₹550.00 due."*

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

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

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** in the box to close it without saving.

On a phone-sized screen, each invoice becomes a card with the same buttons.

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OPERATIONS

### Billing

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

DATE

21/10/2026 📅

|           |             |
|-----------|-------------|
| INVOICES  | BILLED      |
| 5         | ₹2,550.00   |
| COLLECTED | OUTSTANDING |
| ₹1,000.00 | ₹1,550.00   |

At the counter: ₹1,000.00

INVOICES

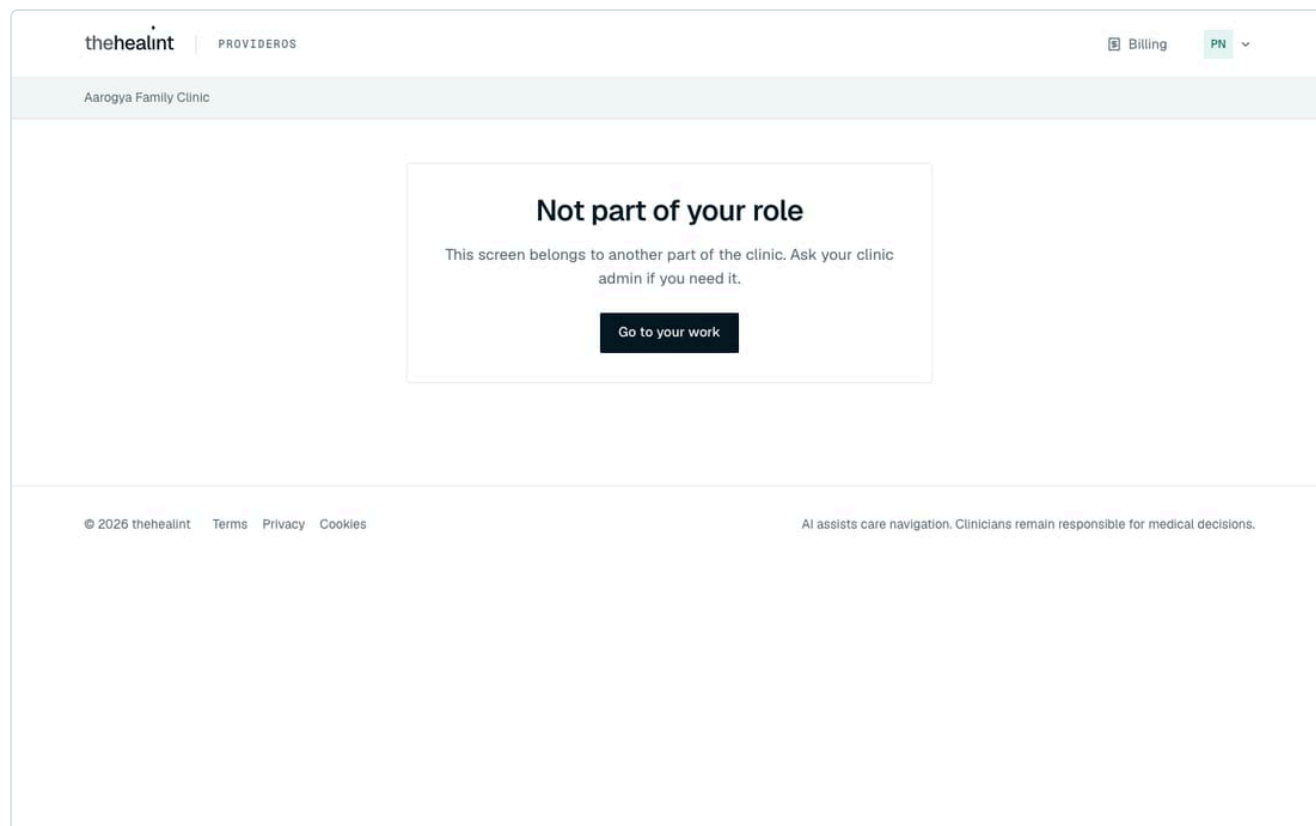
**Ananya Sharma**  
INV-MVHU8FNK-01a15d88  
Total  
₹500.00  
Discount

Paid  
Balance  
Paid

*Billing at phone width: the totals two by two, then one card per invoice.*

## What billing staff don't see

You see Billing only. You **can't** see the queue, the calendar, patients or any clinical information. Opening one of those screens shows **"Not part of your role"** with **Go to your work**.



*What billing staff see on the Reception address.*

## Billing days and currency

Billing groups invoices into days on **your clinic's calendar**, and shows amounts in the clinic's currency. "Today" is the clinic's today, so an invoice raised just after midnight there belongs to the new day. The same applies to the daily totals on Today.

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

| You want to...                                              | Who does it                                            |
|-------------------------------------------------------------|--------------------------------------------------------|
| Check in a patient or register a walk-in                    | The front desk — <a href="#">03-front-desk.md</a>      |
| Put a skipped or no-show patient back in the queue          | The front desk, as a new walk-in                       |
| Move or cancel a booking                                    | The front desk — <a href="#">03-front-desk.md</a>      |
| Start a consultation or read notes                          | The doctor — <a href="#">02-doctor.md</a>              |
| Refund a payment or void an invoice                         | Your clinic admin — <a href="#">05-clinic-admin.md</a> |
| Record cash for an invoice with no Record collection button | Your clinic admin                                      |

| You want to...     | Who does it       |
|--------------------|-------------------|
| Change your access | Your clinic admin |

## Quick reference

| Role    | Task                       | Where                           | Click                                             |
|---------|----------------------------|---------------------------------|---------------------------------------------------|
| Nurse   | See who's waiting          | Reception                       | (updates by itself) <b>Refresh</b>                |
| Nurse   | Call the next patient      | Reception → Today's queue       | <b>Call</b>                                       |
| Nurse   | Patient stepped out        | Called row                      | <b>Skip → Skip token</b>                          |
| Nurse   | Patient left               | Called row                      | <b>No-show → Mark no-show</b>                     |
| Billing | See today's money          | Billing                         | the four totals                                   |
| Billing | See another day            | Billing                         | <b>Date</b>                                       |
| Billing | Record a counter payment   | Billing → invoice               | <b>Record collection → Yes, money received</b>    |
| Billing | Give a discount            | Billing → invoice               | <b>Discount → Apply discount → Apply discount</b> |
| Both    | Turn on two-factor sign-in | Your initials → <b>Security</b> | <b>Set up two-factor authentication</b>           |