

Runbook: Platform admin & support

Who this is for

This guide is for thehealint's own staff: the people who run the platform, not a clinic. You work in **Admin web**, a private portal that is separate from ProviderOS (for clinics) and the patient website.

There are two kinds of platform account:

- **Platform admin.** Can do everything in this guide.
- **Platform support.** Can do the day-to-day work: moderate reviews, answer support tickets, look at the Operations dashboards, product funnel and reliability, and look after reference data and the knowledge base.

Platform support **cannot**:

- verify or reject organizations, pharmacies, labs or professionals;
- open an organization's Tenant 360 page (it shows "Organization not found");
- see or change plans, or publish consent versions;
- read the audit log.

Support accounts still see every menu item. Nothing is hidden. If you try something your account can't do, you'll see a message such as "Your account can't see this queue." instead of a result.

The screenshot displays the 'thehealint' Platform Admin interface. At the top, there's a navigation bar with 'ADMIN' and several menu items: Overview (active), Verification, Pharmacy & labs, Reviews, Support, Operations, Content, Plans, and a user profile 'DS'. Below the navigation bar, the main content area is titled 'PLATFORM ADMIN' and 'Work inbox'. A subtitle reads 'Everything waiting on a decision across the platform, oldest first.' and there's a green 'API healthy' status indicator. The 'Work inbox' is divided into six cards: 'Organizations to verify' (message: 'Your account can't see this queue.'), 'Pharmacies & labs to verify' (message: 'Your account can't see this queue.'), 'Professionals to verify' (message: 'Your account can't see this queue.'), 'Reviews to moderate' (count: 0, message: 'No review is waiting.'), 'Open support tickets' (count: 1, message: 'Oldest waiting 0 minutes'), and 'Plan requests' (message: 'Your account can't see this queue.'). Below the 'Work inbox' is a section titled 'NEEDS ATTENTION' containing a single ticket: 'Runbook demo: refund not received for cancelled visit' (waiting 0 minutes). At the bottom, there's a section titled 'ALL SECTIONS' with a grid of links to various platform features: Verification, Support, Reliability, Pharmacy & labs, Operations, Reference data, Reviews, Product funnel, and Knowledge base.

A platform support account's Work inbox. The three verification lanes say "Your account can't see this queue."; reviews and tickets work normally.

What you'll see

The menu along the top has **Overview**, **Verification**, **Pharmacy & labs**, **Reviews**, **Support**, **Operations**, **Content** and **Plans**. Some screens are reached through tabs inside a section:

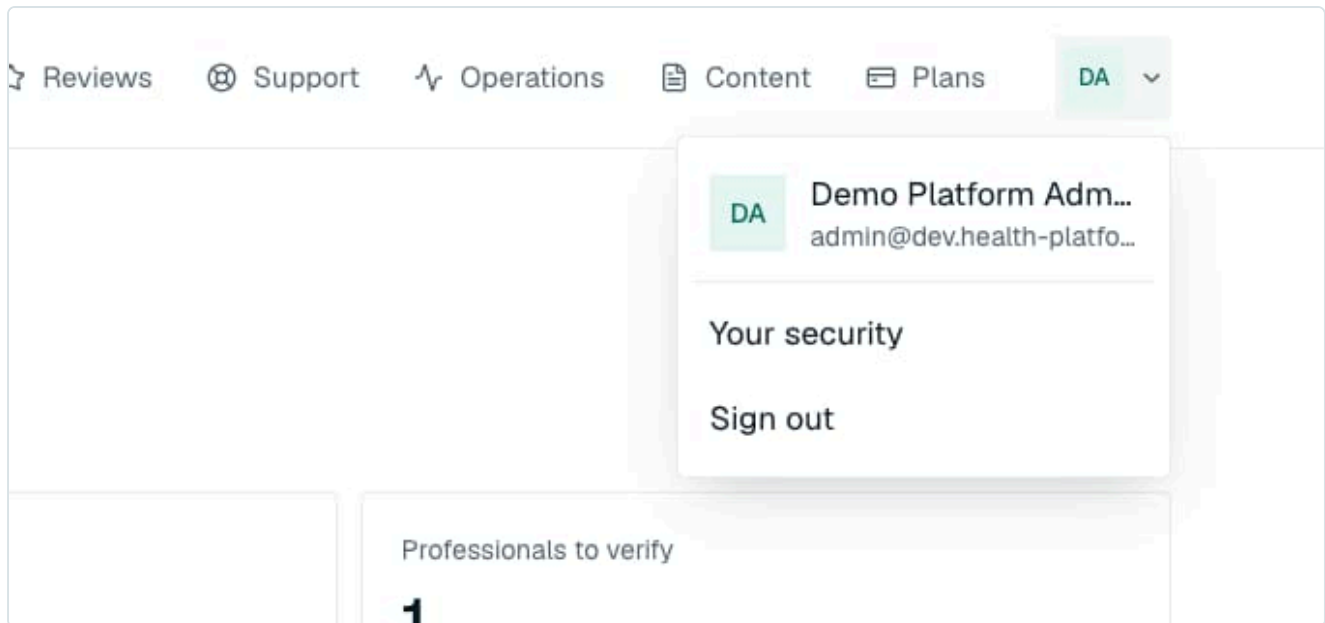
- **Operations** has tabs for **Dashboards**, **Product funnel**, **Reliability** and **Delivery failures**.
- **Content** has tabs for **Reference data** and **Knowledge base**.
- **Plans** has tabs for **Plans**, **Consent versions**, **Audit log** and **Your security**.

The **All sections** list at the bottom of Overview links to all of them.

The button with your initials, at the top right, opens your account menu: your name and email, **Your security** and **Sign out**.

The screenshot shows the 'thehealint' Platform Admin interface. At the top is a navigation bar with the logo and tabs for ADMIN, Overview (active), Verification, Pharmacy & labs, Reviews, Support, Operations, Content, Plans, and a user profile icon 'DA'. Below the navigation bar, the 'Work inbox' section is titled 'PLATFORM ADMIN' and 'Work inbox', with a subtitle 'Everything waiting on a decision across the platform, oldest first.' and an 'API healthy' status pill. The inbox is organized into five lane cards: 'Organizations to verify' (2 items, oldest waiting 7 minutes), 'Pharmacies & labs to verify' (1 item, oldest waiting 6 minutes), 'Professionals to verify' (1 item, oldest waiting 6 minutes), 'Reviews to moderate' (0 items, no review is waiting), and 'Open support tickets' (1 item, oldest waiting 0 minutes). Below these is a 'Plan requests' card (0 items, no plan request is waiting). A 'NEEDS ATTENTION' section follows, listing items with their category, name, and waiting time: Organization 'Nova Skin & Hair Clinic' (waiting 7 minutes), Organization 'Greenleaf Pharmacy' (waiting 6 minutes), Facility 'Greenleaf Pharmacy LLP' (waiting 6 minutes), Professional 'KSPC-2019-11873' (waiting 6 minutes), and Ticket 'Runbook demo: refund not received for cancelled visit' (waiting 0 minutes).

Overview, also called the Work inbox: the top menu, the "API healthy" pill, five lane cards, the Needs attention list and the start of All sections.

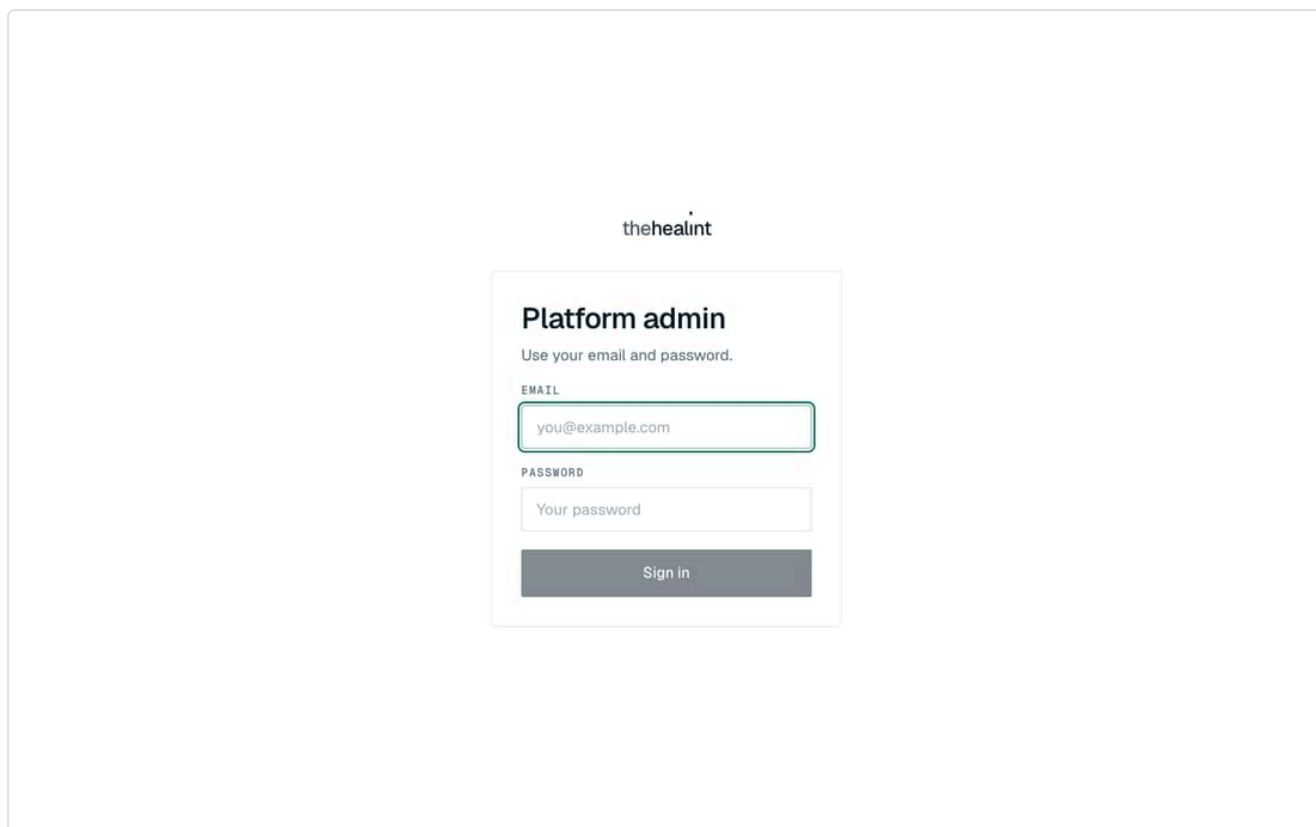


The account menu, opened from your initials: your name and email, Your security and Sign out.

Before you start

Sign in

1. Open Admin web. You'll see the **Platform admin** card: "Use your email and password."
2. Enter your work email and password, then click **Sign in**.
3. If your account has an authenticator app set up, you'll see a **Two-factor check** screen next. Enter the six-digit code from your app in **Authenticator code** and click **Verify**.
4. The first time you sign in, a **One last thing** screen may ask for your full name. Fill it in and continue.
5. You land on the Work inbox.



The Platform admin sign-in card. There is no single sign-on and no way to sign yourself up; your account is created for you.

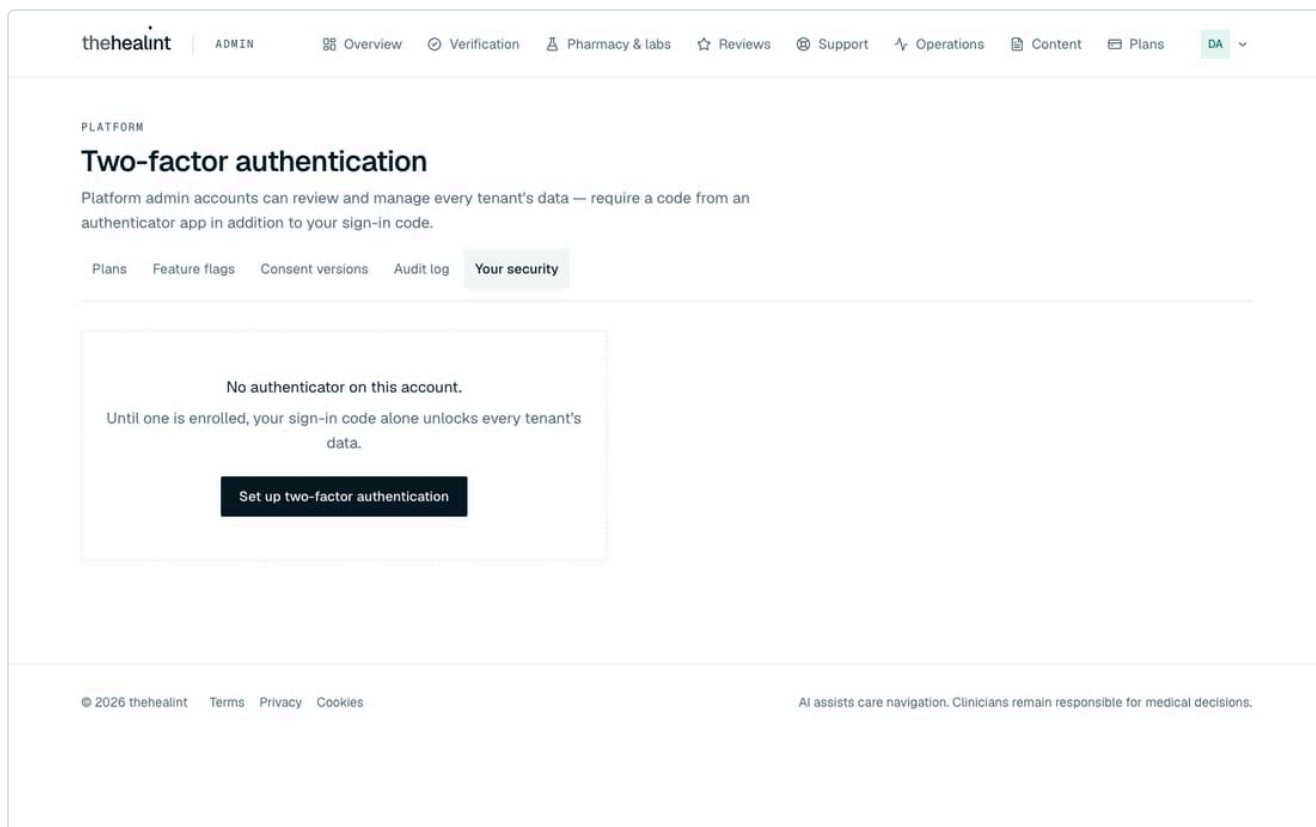
If it doesn't work

- **"This is the private Platform Admin portal"**: the account you used is not a platform staff account. The screen offers **Open ProviderOS** or **Open User web** for the right app. Use **Sign out** and try again with your platform account.
- **The two-factor code is refused**: check the time on your phone is set automatically, wait for a fresh code and try again. If you've lost the phone, ask another platform admin (see the end of this guide).

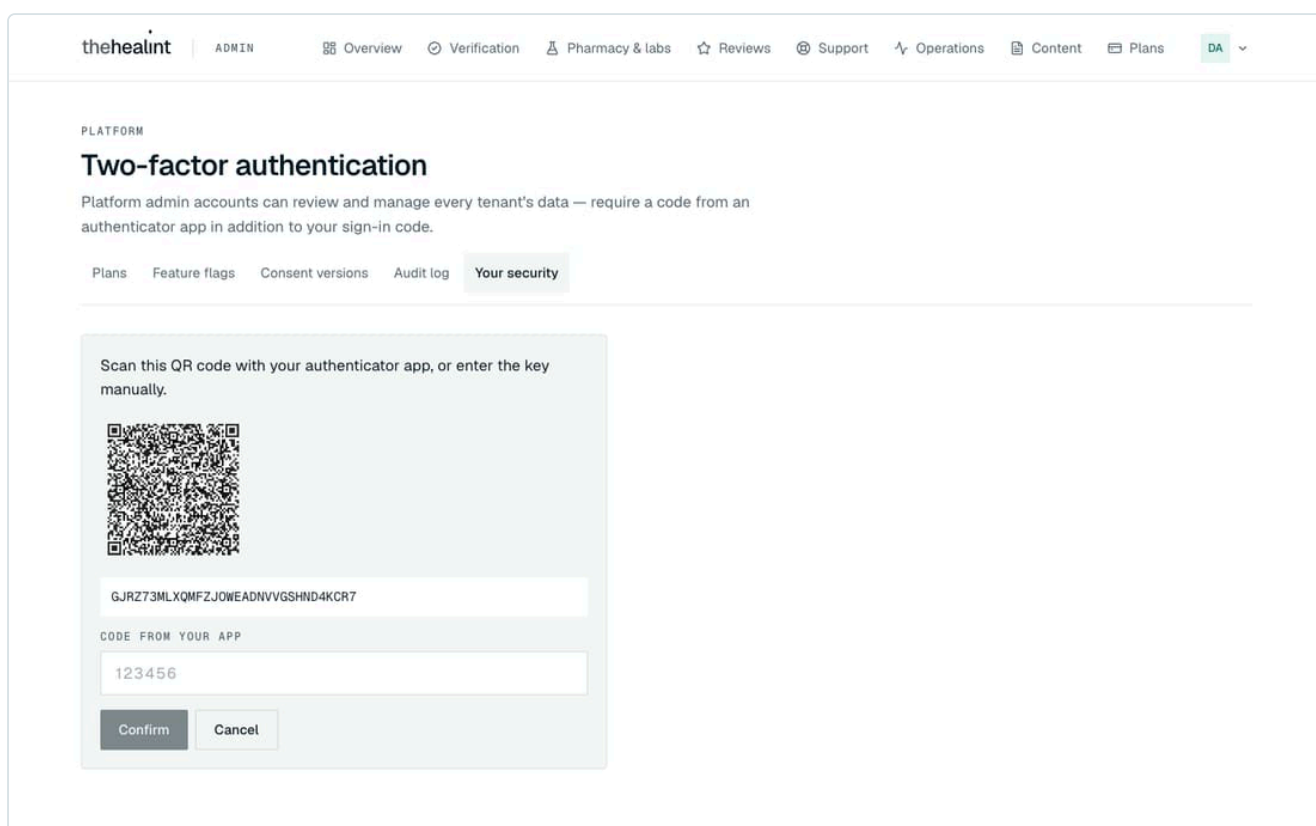
Set up two-factor authentication

Two-factor authentication is not forced on you, but you should turn it on. Your account can see every organization's data, and until you set it up your password alone is enough to get in.

1. Open the account menu (your initials) and choose **Your security**.
2. If you see "No authenticator on this account.", click **Set up two-factor authentication**.
3. A QR code and a text key appear. Scan the QR code with your authenticator app (for example Google Authenticator, Microsoft Authenticator or 1Password), or type the key into the app.
4. Enter the six-digit code the app shows into **Code from your app** and click **Confirm**.
5. The page now lists "Authenticator app · Added *date*". From now on, every sign-in asks for a code.



Your security before setup: "No authenticator on this account." and the Set up two-factor authentication button.



The setup step: the QR code, the key to type in by hand, the Code from your app box, and Confirm or Cancel.

If it doesn't work

- **The code is rejected on Confirm:** codes change every 30 seconds. Type the newest one quickly. Check that your phone's clock is set automatically.
- **You changed your mind halfway:** click **Cancel**. Nothing is saved.
- **New phone:** on Your security, click **Remove** next to the old authenticator, confirm with **Remove authenticator**, then set up the new phone.

How to start the day from the Work inbox

The Work inbox shows everything waiting on a decision across the platform, oldest first.

1. Click **Overview** in the top menu.
2. Check the pill on the right. It should say **API healthy**. If it says **API unreachable**, the platform's back end is down: tell engineering before doing anything else.
3. Read the five lane cards: **Organizations to verify**, **Pharmacies & labs to verify**, **Professionals to verify**, **Reviews to moderate** and **Open support tickets**. Each shows how many items are waiting and how long the oldest has waited.
4. Work down the **Needs attention** list. It shows the 12 oldest items across all lanes, each tagged Organization, Facility, Professional, Review or Ticket.
5. Click an item to act on it:
 - An **Organization** item opens that organization's review straight away.
 - Any other item opens its section (for example Support), and you pick the item from the list there.

The screenshot shows the 'thehealint' Platform Admin interface. The top navigation bar includes 'ADMIN', 'Overview' (active), 'Verification', 'Pharmacy & labs', 'Reviews', 'Support', 'Operations', 'Content', 'Plans', and a 'DA' dropdown. The main content area is titled 'Work inbox' with the subtitle 'Everything waiting on a decision across the platform, oldest first.' and an 'API healthy' status pill. Below this are five lane cards: 'Organizations to verify' (2 items, oldest waiting 7 minutes), 'Pharmacies & labs to verify' (1 item, oldest waiting 6 minutes), 'Professionals to verify' (1 item, oldest waiting 6 minutes), 'Reviews to moderate' (0 items, no review is waiting), and 'Open support tickets' (1 item, oldest waiting 0 minutes). A 'Plan requests' card shows 0 items with no plan request waiting. Below the lane cards is a 'NEEDS ATTENTION' section with a table of 5 items:

Category	Item	Status
Organization	Nova Skin & Hair Clinic	waiting 7 minutes
Organization	Greenleaf Pharmacy	waiting 6 minutes
Facility	Greenleaf Pharmacy LLP	waiting 6 minutes
Professional	KSPC-2019-11873	waiting 6 minutes
Ticket	Runbook demo: refund not received for cancelled visit	waiting 0 minutes

Two things waiting: an organization to verify (Nova Skin & Hair Clinic, 5 minutes) and an open support ticket.

If it doesn't work

- **"Couldn't load this queue."** on one card: that lane failed to load, but the others are still correct. Refresh the page. If it keeps failing, tell engineering.
- **"Your account can't see this queue."**: you're signed in as platform support. Verification lanes are for platform admins only.
- **"Nothing is waiting on a decision."**: you're all caught up.

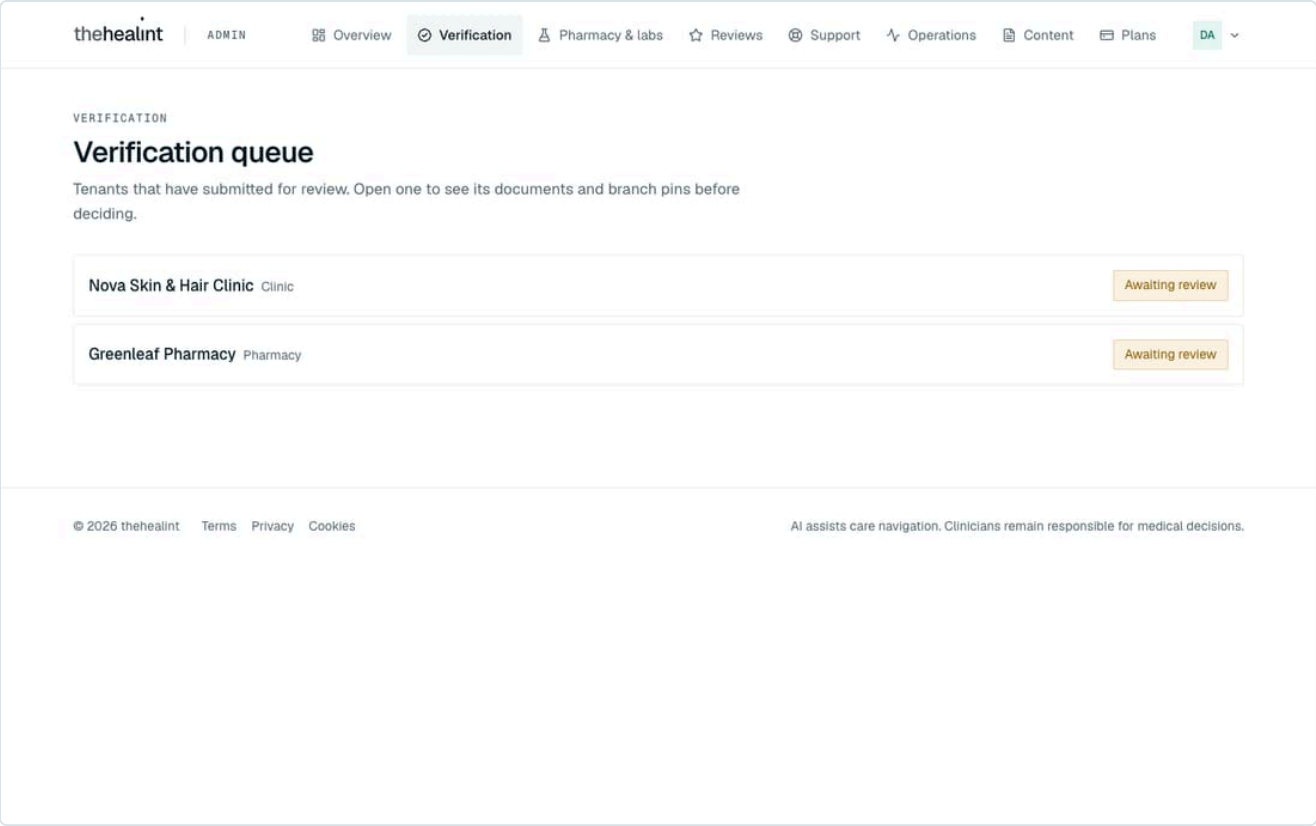
How to verify an organization

When a clinic, hospital or doctor's practice submits its documents, it appears in the Verification queue. You check the documents and the branch locations, then approve or reject. Platform admins only.

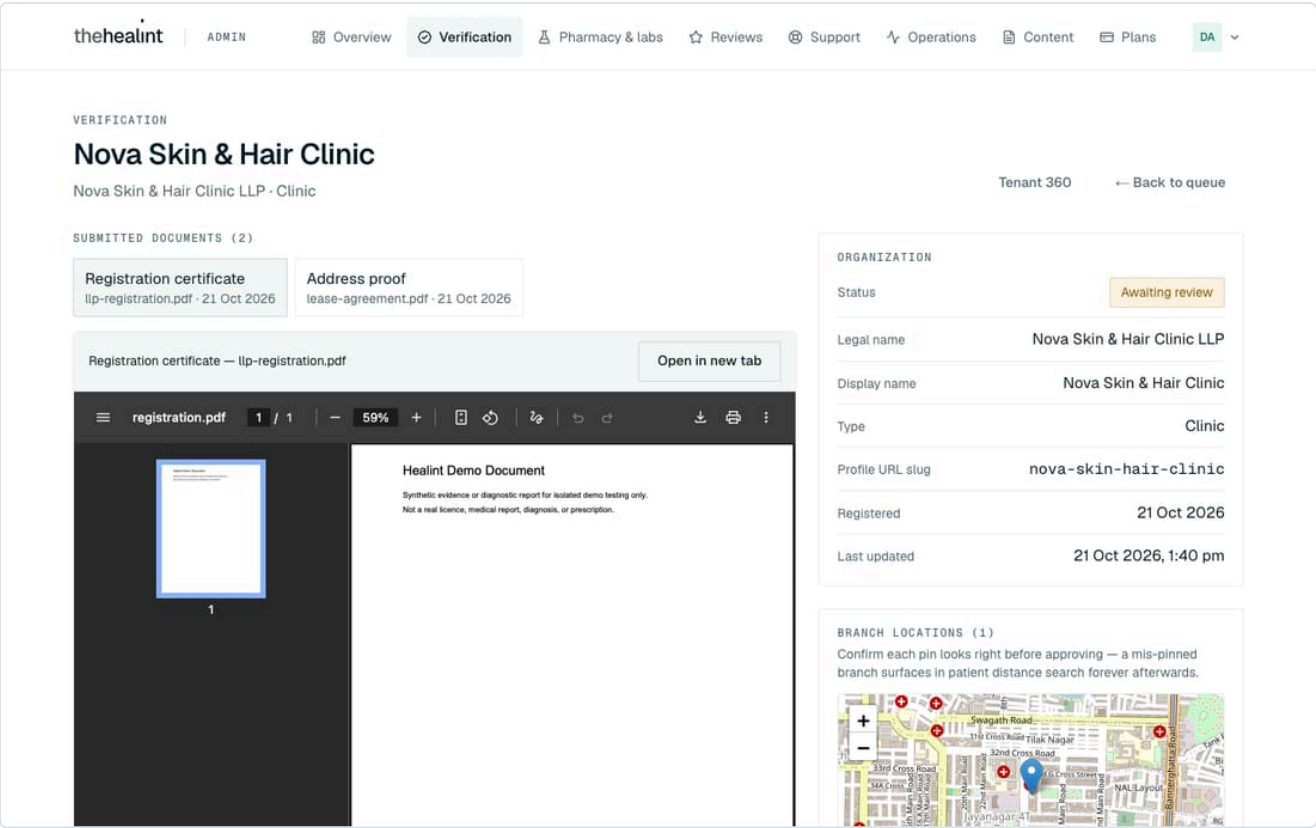
1. Click **Verification** in the top menu (or click the Organization item in the Work inbox). The queue lists each organization with its type and an **Awaiting review** pill.
2. Click the organization's name. The review screen opens.
3. **Check the documents** on the left. Each submitted document is a tab, for example **Registration certificate** and **Address proof**. Click a tab to preview it on the page. Use **Open in new tab** to see it full size, or if the page says the file type can't be previewed.
4. **Check the facts** on the right under **Organization**: legal name, display name, type, profile address and dates. Do they match the documents?
5. **Check the branch pins** under **Branch locations**. Make sure each pin sits on the right street. A wrong pin means patients searching nearby will find the branch in the wrong place.
6. **Write a note** in **Decision notes**. A note is optional when approving, but always write one when rejecting: it's what the organization reads to know what to fix.
7. Click **Approve** or **Reject**.
8. A confirmation box appears:
 - **Approve**: "Name becomes verified and its clinic admins are emailed. Its branches appear in patient search once the organization publishes itself from ProviderOS." Click **Approve**.
 - **Reject**: "Their clinic admins are emailed that the application was not approved, with your note as what to fix." Click **Reject application**.
9. You're taken back to the queue, and the organization is no longer in it.

Who is told: every clinic admin and hospital admin of the organization gets an email. An approval tells them they're verified and can publish from ProviderOS. A rejection includes your note under "What to fix" and asks them to update their documents and submit again.

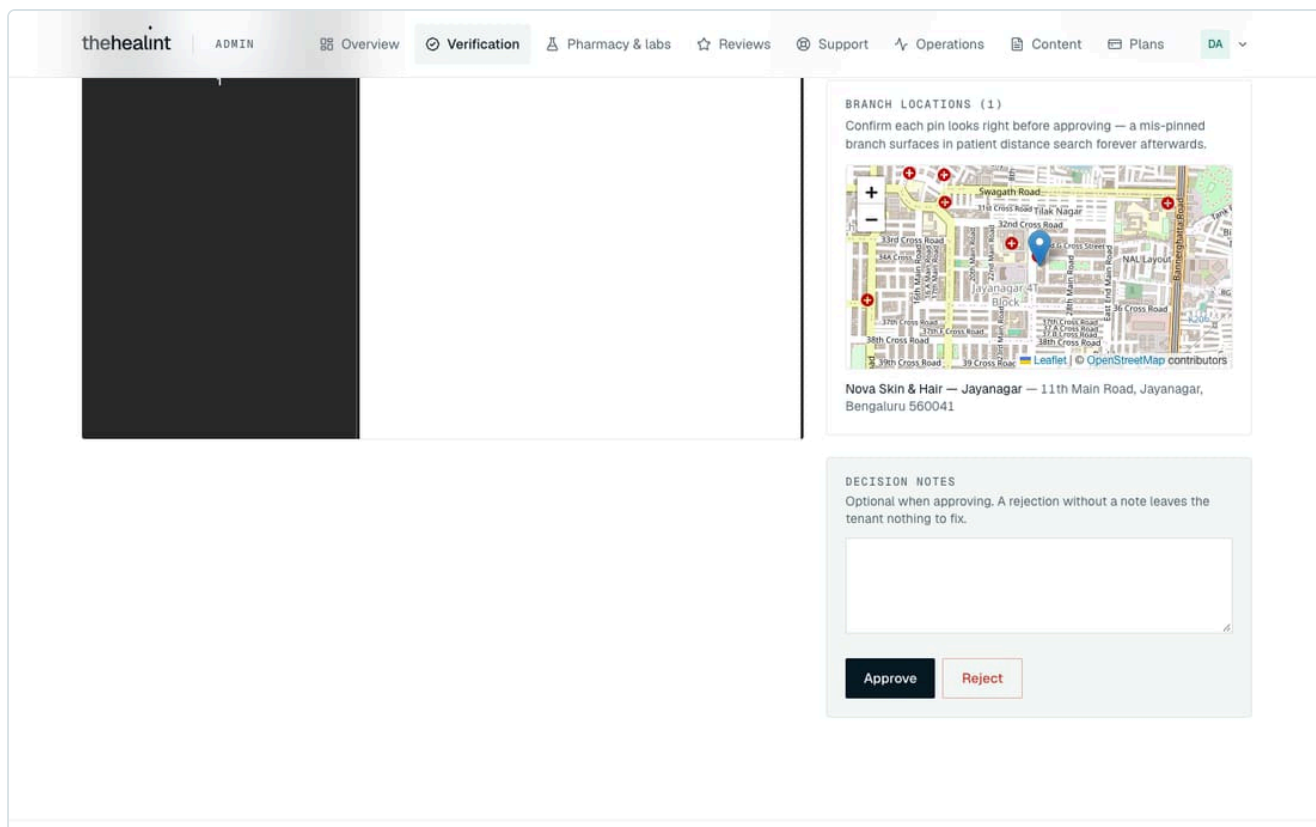
When a rejected organization resubmits: its admin must upload a document newer than your rejection, then click **Submit for review again** in ProviderOS. The organization returns to **Awaiting review** in this queue and the Work inbox. Open it as a new review and compare the new upload with your earlier note; the verification history keeps both the rejection and the REJECTED → SUBMITTED resubmission event.



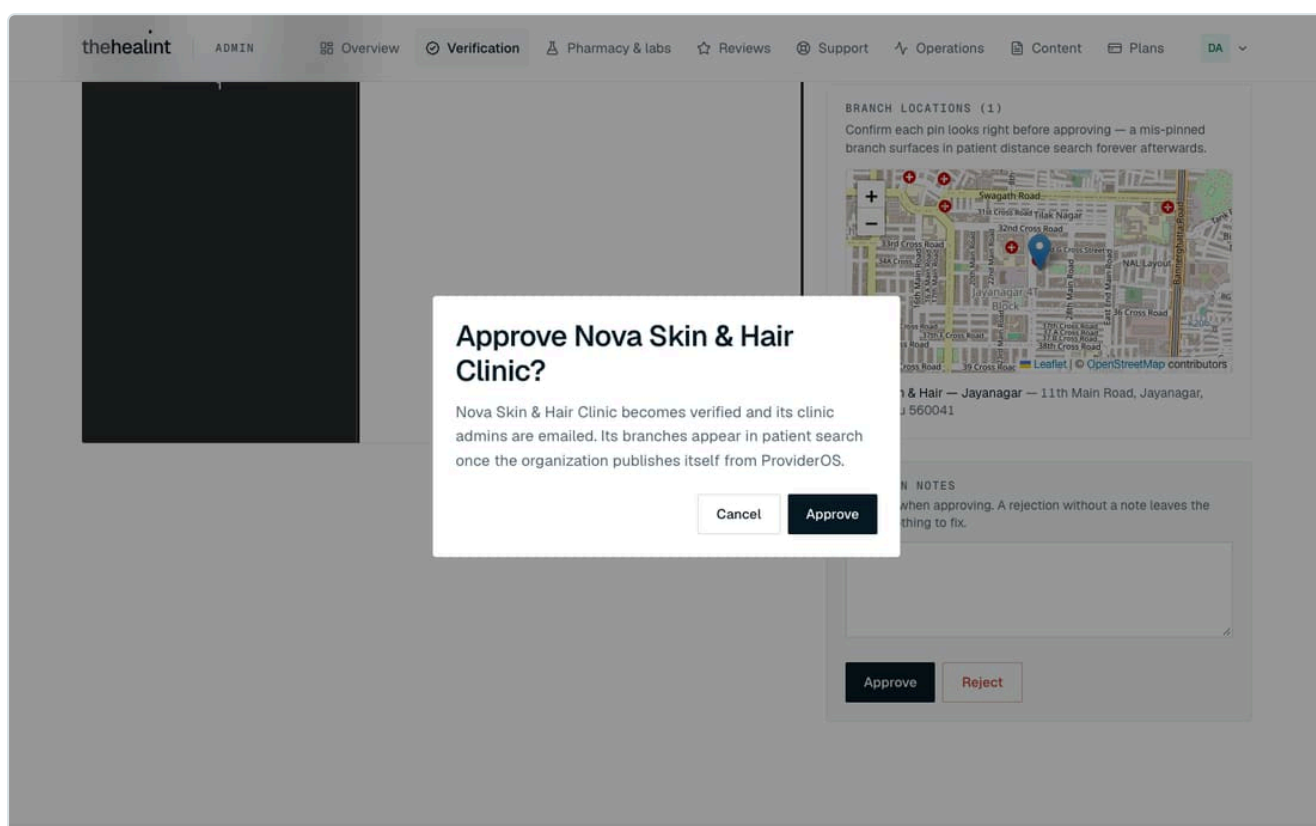
The Verification queue with one organization awaiting review.



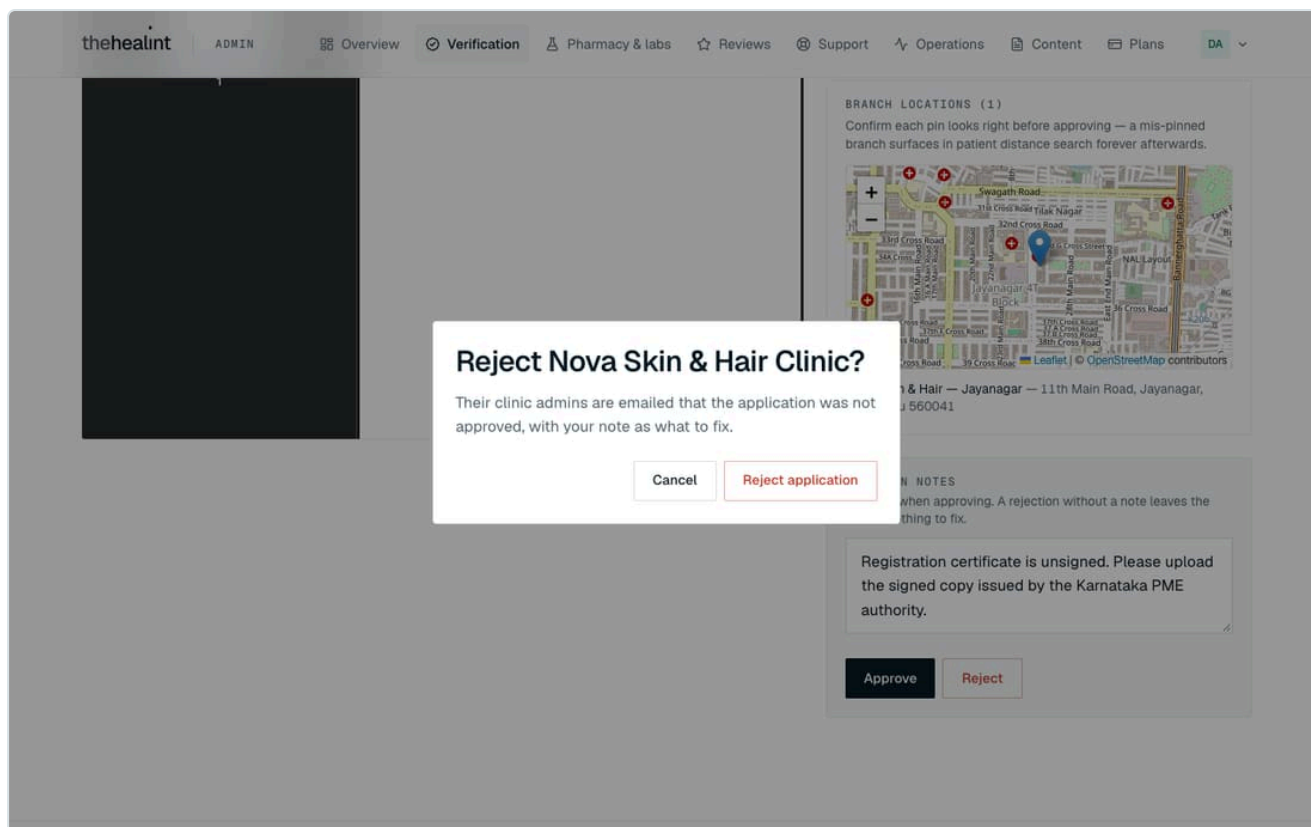
The review screen: the document tabs and preview on the left, the Organization facts on the right, and links to Tenant 360 and Back to queue.



Further down on the right: the branch pin on a map with its address, then Decision notes with Approve and Reject.



The Approve confirmation: the organization becomes verified and its clinic admins are emailed.



The Reject confirmation, with a note written. The admins are emailed with your note as what to fix.

If it doesn't work

- **"No documents uploaded yet.":** don't approve. Reject with a note asking them to upload their documents.
- **"This tenant has pinned no branches.":** a verified organization with no branch can't be found in patient search. Ask them about it before approving.
- **You click Reject without a note:** the box warns "You have not written a note, so they will not know what to fix." Click **Cancel**, write the note, then reject again.
- **"Could not record the decision.":** nothing was saved. Try again. If it keeps happening, tell engineering.
- **The card says "No decision is pending":** someone has already decided this organization. Its history is on Tenant 360.

How to verify a pharmacy, lab or professional

A pharmacy or lab needs two separate checks: the **facility licence** and the **professional** (pharmacist or lab professional) who works there. You decide each one on its own. Platform admins only.

1. Click **Pharmacy & labs** in the top menu.
2. Use **Search the network** to find what you need. You can search by name, licence number, city, status or qualification.
3. Find the card under **Facility licences** or **Professional credentials**. Each card shows a status pill (Draft, Awaiting review, Verified, Rejected or Suspended) and the licence or registration details.

- Click **Evidence** to see the uploaded documents, with their numbers, issuers and expiry dates. Click **Open** next to a document to read it. Each time you open one, it is recorded.
- Choose a decision. The buttons depend on the status:
 - Items **awaiting review** show **Verify** and **Reject**.
 - Verified** items show **Suspend**.
- In the box that opens, read what the decision will do, then fill in **Note for the audit trail** with what you checked and why. **The note is required**: the button stays greyed out until you've written at least a few characters.
- Click the button to confirm (**Verify**, **Reject** or **Suspend**). A message such as "*Name verified*" appears and the list refreshes.

What each decision does:

Decision	For a facility	For a professional
Verify	It appears in patient search and can receive new orders. A current licence must be on file.	They can accept orders and release results.
Reject	It stays out of patient search. The operator can fix it and resubmit.	They can't act on orders. They can submit a corrected credential.
Suspend	It leaves patient search and stops getting new orders straight away. Orders already placed are not cancelled.	They can no longer accept orders or release results.

thehealint
ADMIN
Overview
Verification
Pharmacy & labs
Reviews
Support
Operations
Content
Plans
DA

TRUST & SAFETY

Pharmacy & lab verification

Verify the licensed facility and the professional who accepts, dispenses, or releases results. These are separate decisions.

SEARCH THE NETWORK
9 facilities · 11 professionals. Up to 100 matches are rendered at once.

Name, licence, city, status, or qualification

FACILITY LICENCES

Awaiting review
Pharmacy

Evidence
Verify
Reject

Greenleaf Pharmacy LLP
45, 11th Main Road, Jayanagar 4th Block, Bengaluru 560011
Licence KA-BLR-20B-48213 · Drugs Control Department, Karnataka

Verified
Diagnostic lab

Evidence
Suspend

Aarogya Family Clinic Pvt Ltd
80 Feet Road, Bengaluru 560034
Licence DEMO-KPME-8900080184428 · Karnataka Private Medical Establishments Authority · HFR 8900080184428

Verified
Pharmacy

Evidence
Suspend

Healint Demo Pharmacy

Pharmacy & lab verification: the search box, then facility licence cards with their status, type and licence details. All the demo facilities are already verified, so they show Evidence and Suspend.

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9 facilities · 11 professionals. Up to 100 matches are rendered at once.

Name, licence, city, status, or qualification

FACILITY LICENCES

Awaiting review

Pharmacy

Evidence

Verify

Reject

Greenleaf Pharmacy LLP

45, 11th Main Road, Jayanagar 4th Block, Bengaluru 560011

Licence KA-BLR-20B-48213 · Drugs Control Department, Karnataka

Pharmacist registration · KSPC-2019-11873 · Karnataka State Pharmacy Council · rahul-shetty-pharmacist-registration.pdf

Open

Drug licence · KA-BLR-20B-48213 · Drugs Control Department, Karnataka · expires 31/3/2028 · greenleaf-drug-licence.pdf

Open

Verified

Diagnostic lab

Evidence

Suspend

Aarogya Family Clinic Pvt Ltd

80 East Road, Bengaluru 560024

Evidence expanded on a pharmacy: each document with its number, issuer, expiry date and an Open button.

thehealint
ADMIN
Overview
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TRUST & SAFETY

Pharmacy & lab verification

Verify the licensed facility and the professional who accepts, dispenses, or releases results. These are separate decisions.

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Pharmacist registration · KSPC-2019-11873 · Karnataka State Pharmacy Council · rahul-shetty-pharmacist-registration.pdf

Open

Drug licence · KA-BLR-20B-48213 · Drugs Control Department, Karnataka · expires 31/3/2028 · greenleaf-drug-licence.pdf

Open

Verified

Diagnostic lab

Evidence

Suspend

Aarogya Family Clinic Pvt Ltd

80 East Road, Bengaluru 560024

Suspend Aarogya Family Clinic Pvt Ltd?

It leaves patient search and stops receiving new orders immediately. Orders already placed are not cancelled.

NOTE FOR THE AUDIT TRAIL

What you checked and why — this is stored with the decision.

Drug licence expired on 30 Sep; operator asked to upload the renewal.

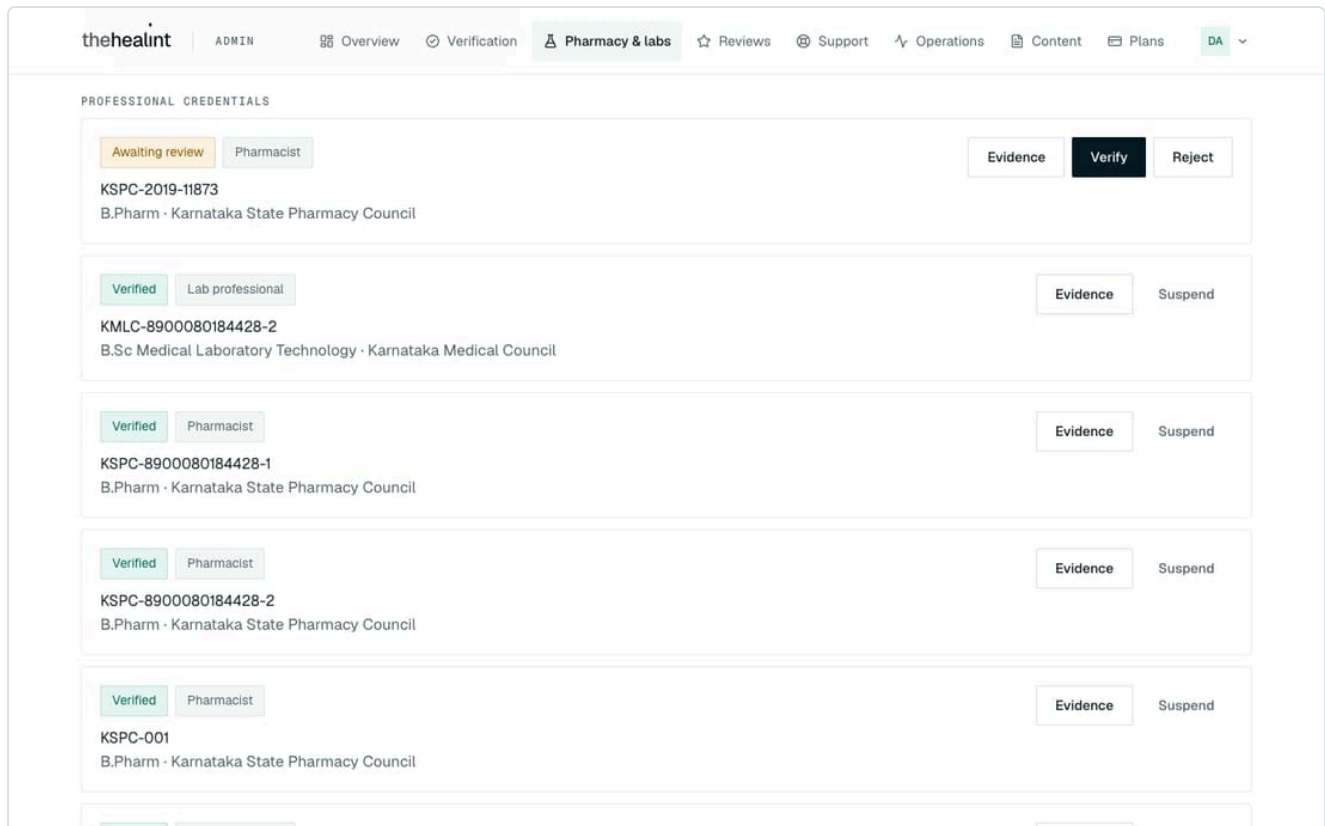
Cancel

Suspend

The Suspend box: what suspending does, the required Note for the audit trail, and the Suspend button. Verify and Reject open the same kind of box.

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Professional credentials: a card for each lab professional or pharmacist with their registration number, qualification and council.

If it doesn't work

- **"No evidence uploaded. Do not verify."**: reject with a note asking for the licence.
- **Verify is refused**: the evidence has expired, or the item is no longer awaiting review. Check the expiry dates under Evidence.
- **"Could not record the facility decision."** (or "...credential decision.") : nothing was saved. Try again.
- **The operator wasn't told**: that's expected. Facility and professional decisions don't send an email. If the operator needs to know, contact them yourself.

How to look up an organization (Tenant 360)

Tenant 360 is a one-page summary of an organization. It's read-only: any changes are made from other sections. Platform admins only.

1. Click **Operations** in the top menu.
2. Scroll to **Providers**. To narrow the list, choose a status from the drop-down (Submitted, Under review, Verified, Rejected).
3. Click the organization's name.
4. Read the page. At the top are its type, its name and two pills: its verification status, and **Published** with a date or **Not published**. Below are these sections:
 - **Verification**: the history of decisions and notes. While the organization is waiting, a **Review** button takes you straight to its review screen.

- **Documents, Branches.**
- **Plan:** its plan and status. **Change plan** takes you to Plans.
- **Pharmacies & labs, Support tickets** and **Recent appointments.**

5. Click ← **All providers** to go back.

thehealint	ADMIN	Overview	Verification	Pharmacy & labs	Reviews	Support	Operations	Content	Plans	DA
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PROVIDERS (15)										
All statuses										
Riverside Clinic	Clinic	Verified								
Greenleaf Pharmacy	Pharmacy	Submitted								
Lakeview Family Clinic	Clinic	Verified								
Bengaluru Care Pharmacy	Pharmacy	Verified								
Healint Demo Pharmacy	Pharmacy	Verified								
Namma Community Pharmacy	Pharmacy	Verified								
Healint Demo Diagnostics	Diagnostic lab	Verified								
Bengaluru Precision Labs	Diagnostic lab	Verified								
Namma Community Diagnostics	Diagnostic lab	Verified								
Aarogya Family Clinic	Hospital	Verified								
Sunrise Multispecialty Hospital	Hospital	Verified								
Nova Skin & Hair Clinic	Clinic	Submitted								

Operations, Providers: the status filter and every organization with its type and status. Click a name to open Tenant 360.

The screenshot shows the admin interface for 'Nova Skin & Hair Clinic'. At the top, there's a navigation bar with 'thehealint' logo and various menu items: ADMIN, Overview, Verification, Pharmacy & labs, Reviews, Support, Operations, Content, Plans, and a user profile 'DA'. Below the navigation bar, there's a breadcrumb link '← All providers'. The clinic name 'Nova Skin & Hair Clinic' is prominently displayed, followed by 'Nova Skin & Hair Clinic LLP'. To the right of the clinic name are two status buttons: 'Submitted' (highlighted in orange) and 'Not published' (grey). The main content area is divided into several sections:

- VERIFICATION**: A section with a 'Review' button and the text 'No verification decisions yet.'
- DOCUMENTS**: A list of documents including 'Registration certificate' and 'Address proof', both dated '21 Oct 2026'.
- BRANCHES**: A section showing 'Nova Skin & Hair — Jayanagar Bengaluru'.
- PLAN**: A section showing 'Plan: Free' and 'Status: Active', with a 'Change plan' button.
- REGION**: A section showing 'Language: English (India)', 'Currency: INR', and 'Time zone: Asia/Kolkata', with a 'Change' button.
- PHARMACIES & LABS**: A section stating 'This organization runs no pharmacy or lab.'
- SUPPORT TICKETS**: A section at the bottom, currently empty.

Tenant 360 for an organization that has submitted but isn't verified yet: Submitted and Not published pills, a Review button, documents, its branch, its plan with Change plan, its Region (language, currency and time zone, with Change for platform administrators), and the remaining sections.

If it doesn't work

- **"Organization not found"**: either the link is wrong, or you're signed in as platform support, which can't open this page.
- **"Not available to your account."** in one section: your account can't see that part. The rest of the page is still correct.

How to moderate reviews

Patients can review a completed visit. You decide whether a review shows on the doctor's public profile.

1. Click **Reviews** in the top menu.
2. Choose a filter: **Awaiting moderation** (the default), **Published**, **Hidden** or **All**.
3. Click a review in the list. The full review opens on the right with the rating, the comment, who it's about, the clinic, the visit date and the date it was submitted. If the practice has replied, its public response is shown too.
4. Decide:
 - **To publish it**, click **Publish**, then **Publish review**. It appears on the doctor's public profile straight away, visible to anyone.

- **To hide it**, first write a **Reason**, for example "Names a staff member and includes their phone number." **Hide** stays greyed out until there's a reason. Click **Hide**, check your reason in the box, then click **Hide review**.

thehealint | ADMIN | Overview | Verification | Pharmacy & labs | **Reviews** | Support | Operations | Content | Plans | DA

REVIEW MODERATION

Patient reviews of completed visits. Publishing puts one on a practitioner's public profile; hiding takes it down with a reason on the record.

Awaiting moderation | Published | Hidden | **All**

★★★★★

Helpful follow-up and clear next steps.

Dr. Arjun Reddy · Sunrise Multispecialty Hospital · 19 Oct 2026

Published

★★★★★

The doctor was patient and explained the care plan for my child.

Dr. Meera Iyer · Aarogya Family Clinic · 18 Oct 2026

Published

★★★★★

Clear explanation and a smooth consultation experience.

Dev Clinic Admin · Aarogya Family Clinic · 17 Oct 2026

Published

★★★★★

Helpful follow-up and clear next steps.

About Dr. Arjun Reddy
At Sunrise Multispecialty Hospital
Visit 18 Oct 2026
Submitted 19 Oct 2026

THE PRACTICE'S PUBLIC RESPONSE
Thank you for sharing your experience.

REASON
Required to hide a review. Saved with it, so anyone revisiting this decision can see why.

Names a staff member and includes their phone number.

The All filter with a published review selected: stars, comment, About, At, Visit and Submitted dates, the practice's public response, and a reason typed in ready to hide it.

thehealint | ADMIN | Overview | Verification | Pharmacy & labs | **Reviews** | Support | Operations | Content | Plans | DA

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THE PRACTICE'S PUBLIC RESPONSE
Thank you for sharing your experience.

REASON
Required to hide a review. Saved with it, so anyone revisiting this decision can see why.

Names a staff member and includes their phone number.

Hide this review?

It disappears from the practitioner's public profile. The reason you wrote is stored on the review.

"Names a staff member and includes their phone number."

Cancel | **Hide review**

Publish | Hide

© 2026 thehealint | Terms | Privacy | Cookies | AI assists care navigation. Clinicians remain responsible for medical decisions.

"Hide this review?" quotes your reason, which is stored with the review. Publish is greyed out because this review is already published.

If it doesn't work

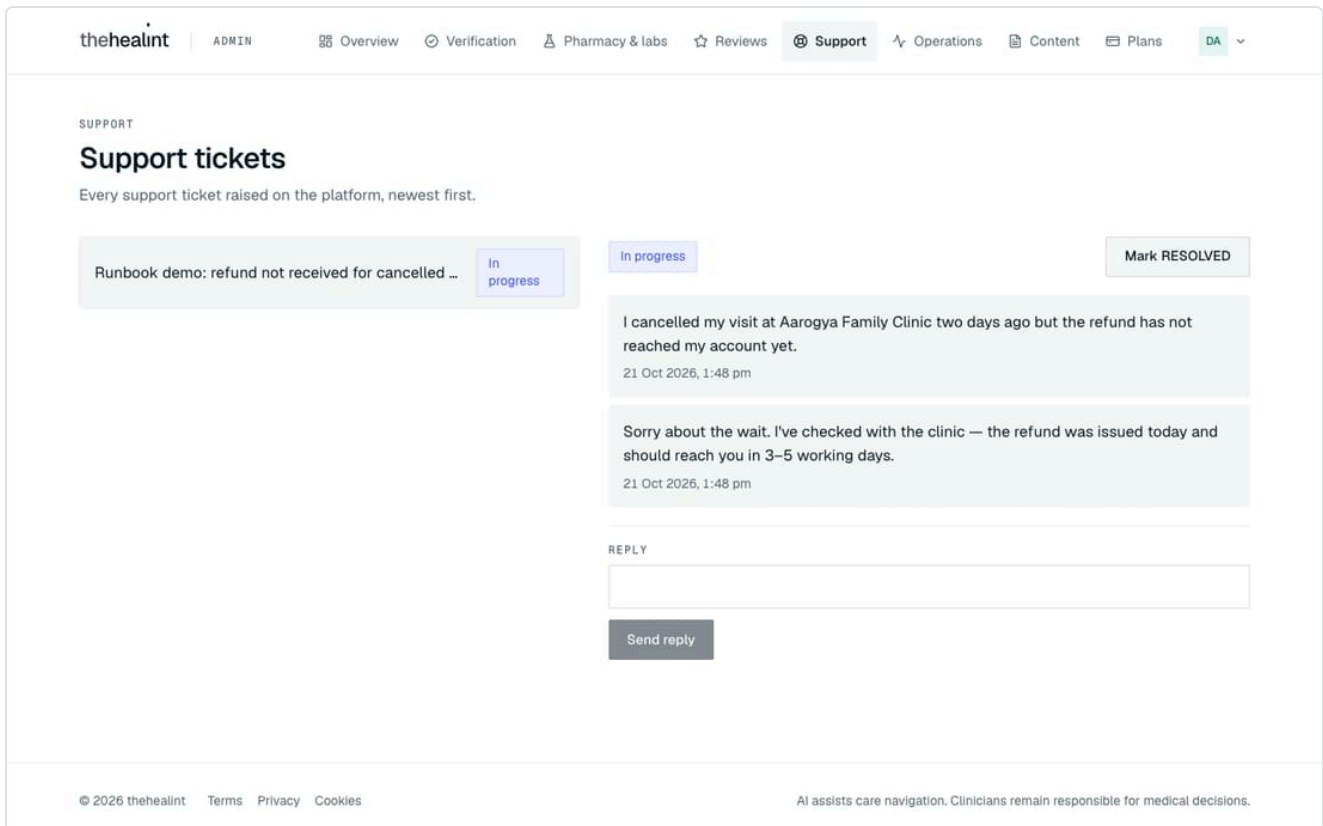
- **"Nothing is waiting for moderation.":** no new reviews. Switch to **All** to see older ones.
- **"Could not record that moderation decision.":** nothing was saved. Try again.
- **The patient or practice wasn't told:** that's expected. Moderation doesn't send a notification.

How to handle a support ticket

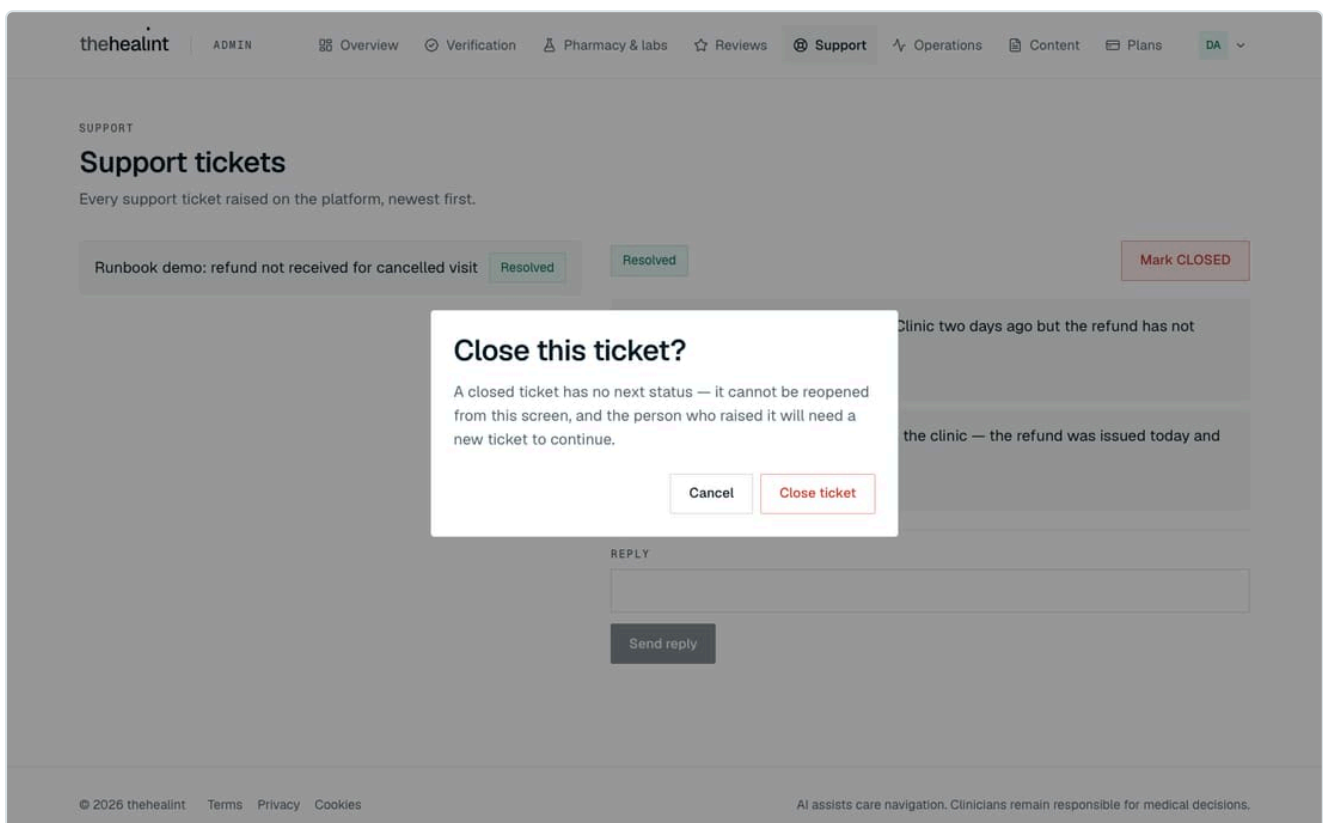
1. Click **Support** in the top menu. Tickets are listed newest first, each with a status: **Open**, **In progress**, **Resolved** or **Closed**.
2. Click a ticket. Its messages appear on the right, each with a time.
3. If the ticket is about a particular appointment, visit or invoice, a **Scoped record** card shows that one record. It never includes clinical notes or diagnoses.
4. To answer, type in **Reply** and click **Send reply**. Your reply joins the thread.
5. Move the ticket on with the button at the top right. Each click moves it one step: Open, then In progress, then Resolved, then Closed. The button shows the next status in capitals, for example **Mark IN_PROGRESS**, **Mark RESOLVED**, **Mark CLOSED**.
6. When you click **Mark CLOSED**, a box asks you to confirm. A closed ticket can't be reopened, and the person would need to raise a new one. Click **Close ticket** only when you're sure.

The screenshot shows the 'thehealint' platform's support interface. At the top is a navigation bar with links: ADMIN, Overview, Verification, Pharmacy & labs, Reviews, Support (active), Operations, Content, Plans, and a user profile 'DA'. Below the navigation bar, the 'SUPPORT' section is titled 'Support tickets' with a subtitle 'Every support ticket raised on the platform, newest first.' A ticket card is displayed with the title 'Runbook demo: refund not received for cancelled visit' and an 'Open' status button. To the right of the card is a 'Mark IN_PROGRESS' button. The ticket content shows a message: 'I cancelled my visit at Aarogya Family Clinic two days ago but the refund has not reached my account yet.' dated '21 Oct 2026, 1:48 pm'. Below the message is a 'REPLY' section with a text input box containing 'ith the clinic — the refund was issued today and should reach you in 3–5 working days.' and a 'Send reply' button. The footer contains copyright information '© 2026 thehealint', links for Terms, Privacy, and Cookies, and a disclaimer: 'AI assists care navigation. Clinicians remain responsible for medical decisions.'

An open ticket: the patient's message, a reply typed in the Reply box, and Mark IN_PROGRESS at the top right.



After Send reply and Mark IN_PROGRESS: the reply is in the thread, the ticket is In progress, and the next step is Mark RESOLVED.



Closing a resolved ticket: "Close this ticket?" warns that it cannot be reopened.

If it doesn't work

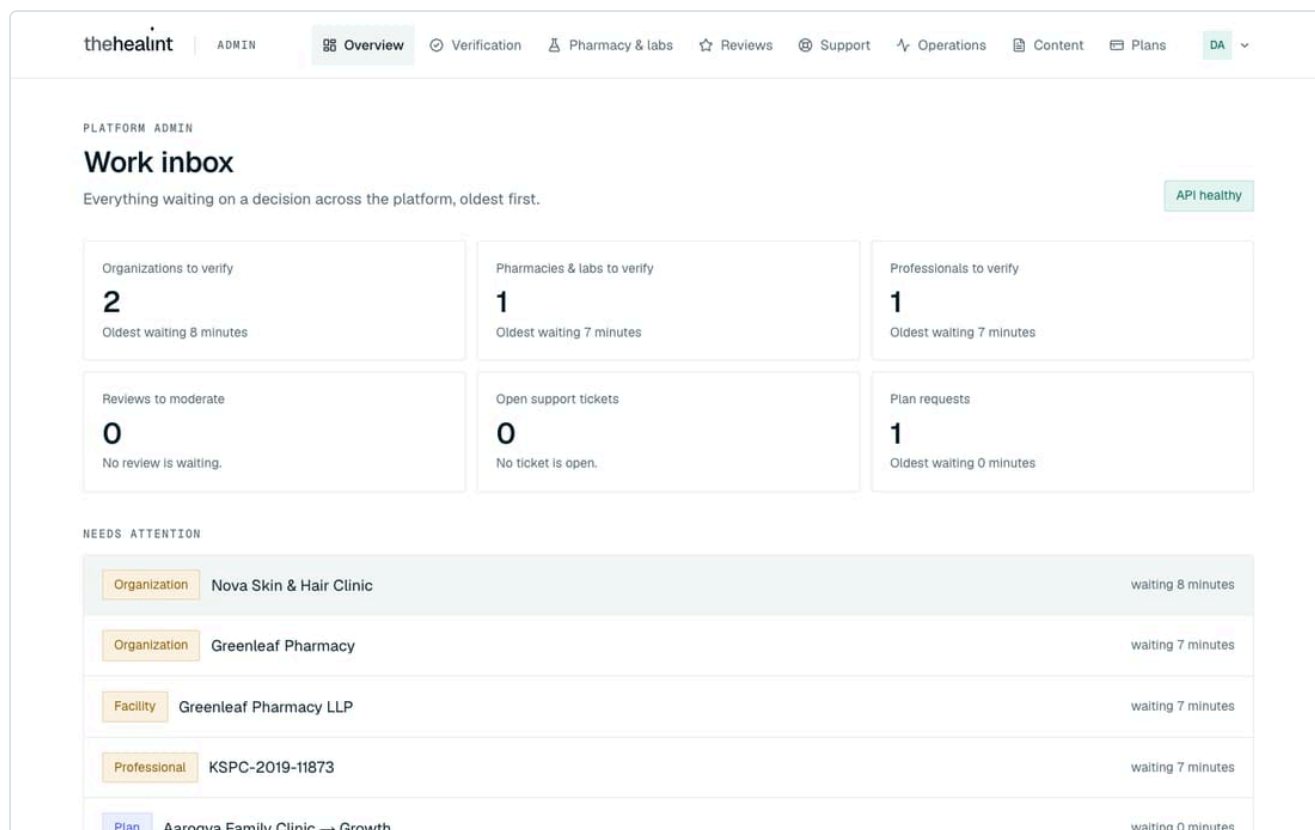
- **"No tickets."**: either nothing has been raised, or your account can't see support tickets.
- **You closed a ticket by mistake**: it can't be reopened here. Ask the person to raise a new ticket, and mention the old one in your reply.
- **You can't see who wrote each message**: that's expected. Messages show only a time. The first message is from the person who raised the ticket.

How to manage plans and subscriptions

Platform admins only.

Plan requests from clinics

Clinics ask for a different plan from ProviderOS (Settings → Plan). Each request shows up in the **Work inbox** under **Plan requests**, and you're emailed.



thehealint ADMIN Overview Verification Pharmacy & labs Reviews Support Operations Content Plans DA

PLATFORM ADMIN

Work inbox

Everything waiting on a decision across the platform, oldest first. API healthy

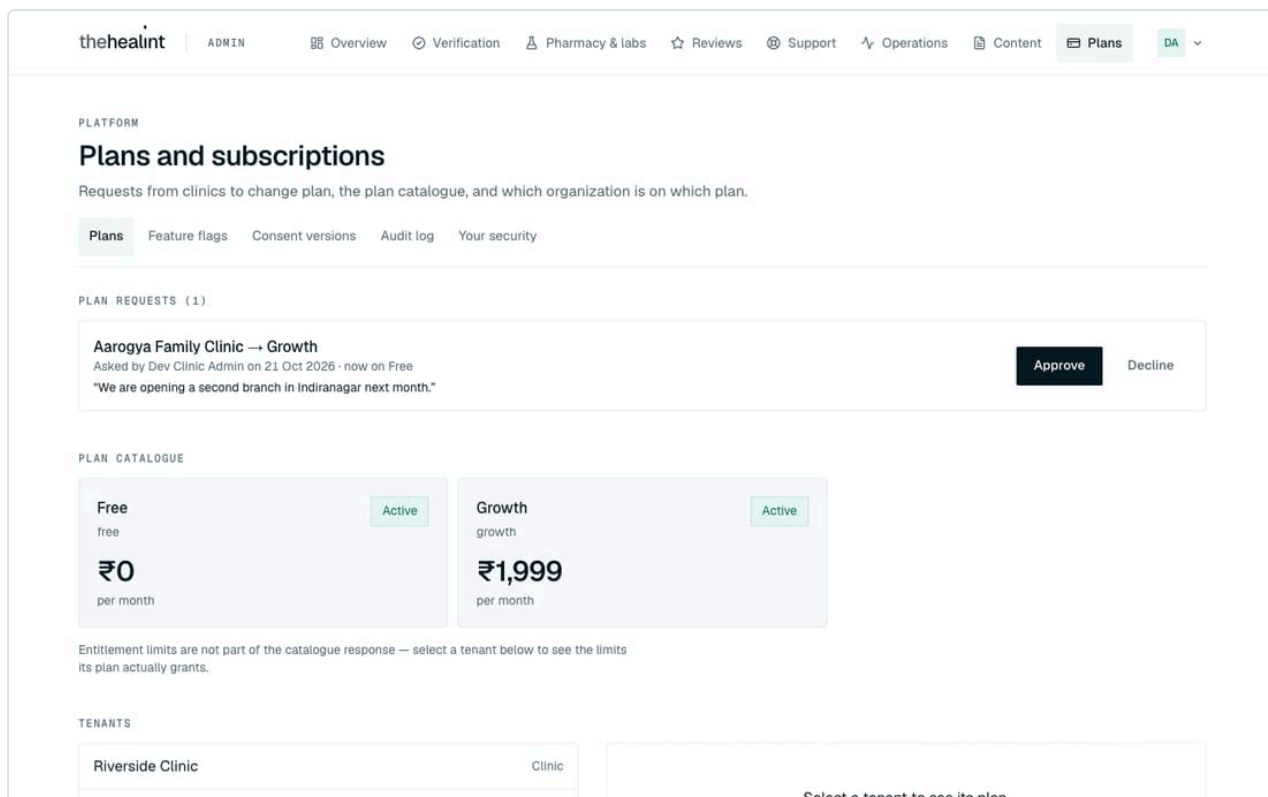
Organizations to verify 2 Oldest waiting 8 minutes	Pharmacies & labs to verify 1 Oldest waiting 7 minutes	Professionals to verify 1 Oldest waiting 7 minutes
Reviews to moderate 0 No review is waiting.	Open support tickets 0 No ticket is open.	Plan requests 1 Oldest waiting 0 minutes

NEEDS ATTENTION

Organization	Nova Skin & Hair Clinic	waiting 8 minutes
Organization	Greenleaf Pharmacy	waiting 7 minutes
Facility	Greenleaf Pharmacy LLP	waiting 7 minutes
Professional	KSPC-2019-11873	waiting 7 minutes
Plan	Aarogya Family Clinic → Growth	waiting 0 minutes

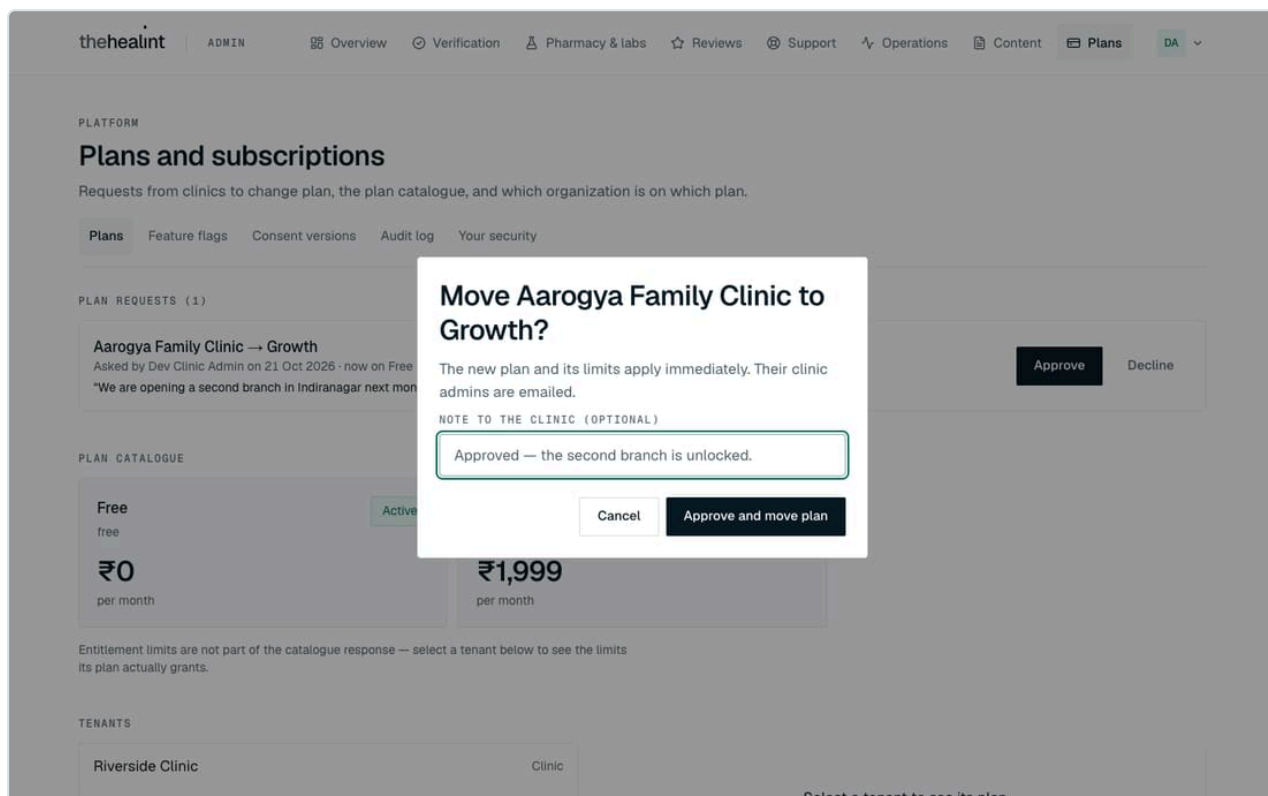
The Work inbox: a Plan requests lane next to the verification and support lanes.

1. Click **Plans** in the top menu. **Plan requests** at the top lists each one: the organization, the plan they want, who asked, when, their current plan and their note.



*Aarogya Family Clinic asking to move from Free to Growth, with their note, and **Approve** / **Decline**.*

2. Click **Approve** to move them now, or **Decline**. A note is optional when approving and required when declining — it goes in the email to their clinic admins.



"Move Aarogya Family Clinic to Growth?" — the new limits apply immediately and their admins are emailed.

3. Approving changes their plan at once; the request disappears from the list either way.

Changing a plan directly

1. Click **Plans** in the top menu.
2. At the top, **Plan catalogue** lists each plan (for example Free and Growth) with its price and whether it's **Active** or **Retired**. Plans can't be created or edited here.
3. Under **Tenants**, click the organization. Its current plan, price and limits appear on the right.
4. Pick the new plan in **Plan**. The change takes effect immediately: there's no option to schedule it for the end of the month.
5. Click **Change plan** (or **Assign plan** if it has none yet). Read the box, then click **Change plan** again to confirm.

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Entitlement limits are not part of the catalogue response — select a tenant below to see the limits its plan actually grants.

TENANTS

Namma Community Pharmacy	Pharmacy
Healint Demo Diagnostics	Diagnostic lab
Bengaluru Precision Labs	Diagnostic lab
Namma Community Diagnostics	Diagnostic lab
Aarogya Family Clinic	Hospital
Sunrise Multispecialty Hospital	Hospital
Nova Skin & Hair Clinic	Clinic
Dr. Meera Iyer Practice	Individual doctor
Dr. Arjun Nair Practice	Individual doctor
Dr. Aditi Rao Practice	Individual doctor

Dr. Meera Iyer Practice Active

Free

Price ₹0 per month

ENTITLEMENTS ON FREE

Max branches max_branches	1
Max practitioners max_practitioners	3
Provider roi dashboard provider_roi_dashboard	false

PLAN

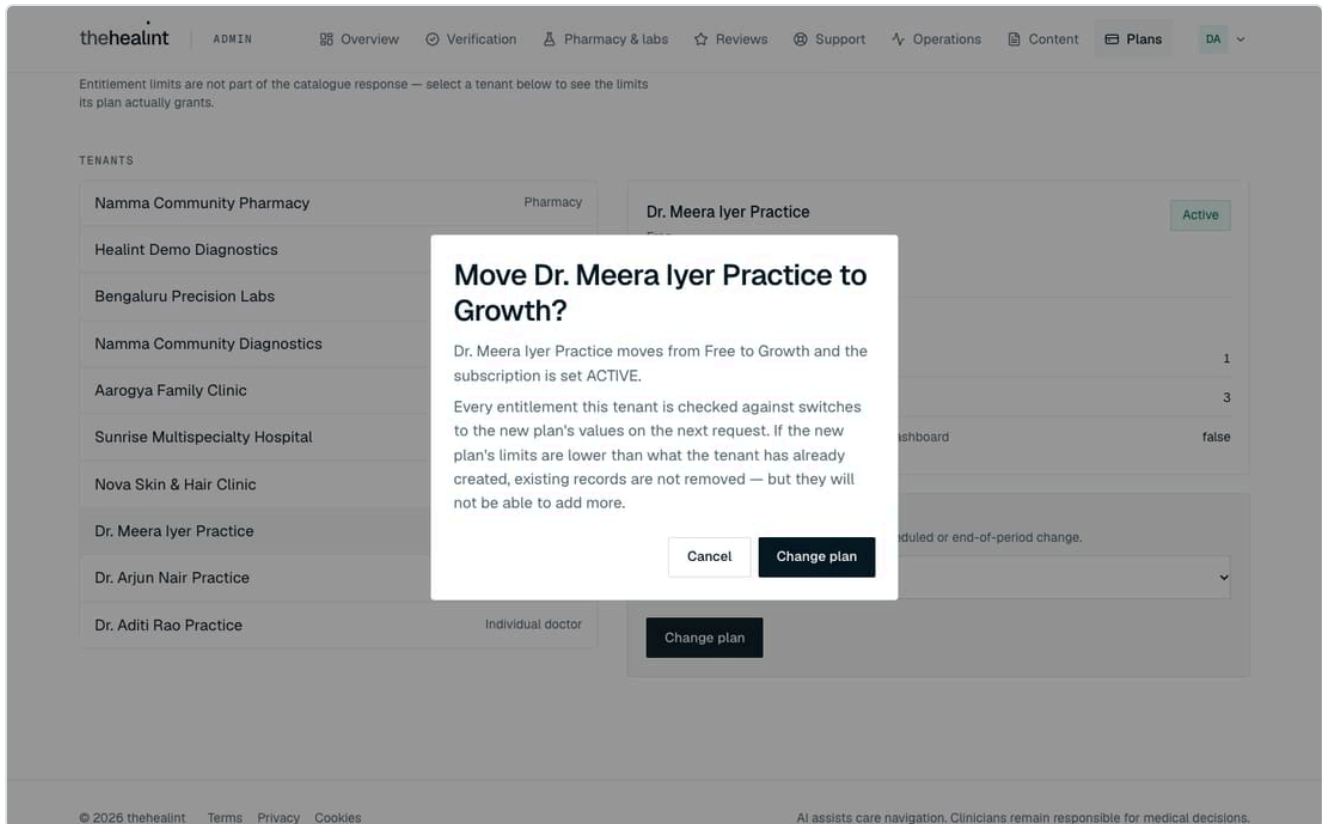
Takes effect immediately — there is no scheduled or end-of-period change.

Growth — ₹1,999/mo

Change plan

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A doctor's practice on Free, with its limits listed and Growth chosen in the Plan box, ready to change.



"Move ... to Growth?" The new limits apply on their next request. If the new plan's limits are lower, nothing they already have is removed, but they can't add more.

If it doesn't work

- **The Change plan button is greyed out:** you haven't picked a different plan.
- **Moving to a smaller plan:** the organization keeps any branches or practitioners above the new limit, but can't add more. Tell them before you make the change.

How to check platform health

Operations dashboards

1. Click **Operations**. The **Dashboards** tab opens.
2. **Payments:** money collected today, this week and this month, plus how many payments are pending and how many failed.
3. **Patients:** total patients and new sign-ups this week and this month. These are counts only; you can't see individual patients here.
4. **Providers:** every organization and its status (see Tenant 360 above).
5. **Recent appointments:** the latest bookings across every organization.

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OPERATIONS

Platform dashboards

Providers, appointments, payments and patients across every organization on the platform.

Dashboards | Product funnel | Reliability | Delivery failures

PAYMENTS

COLLECTED TODAY ₹1,000	COLLECTED THIS WEEK ₹1,750	COLLECTED THIS MONTH ₹4,050
PENDING 0	FAILED 0	

PATIENTS

Counts only — individual patients' records are not shown here.

TOTAL PATIENTS 6	NEW THIS WEEK 2	NEW THIS MONTH 6
----------------------------	---------------------------	----------------------------

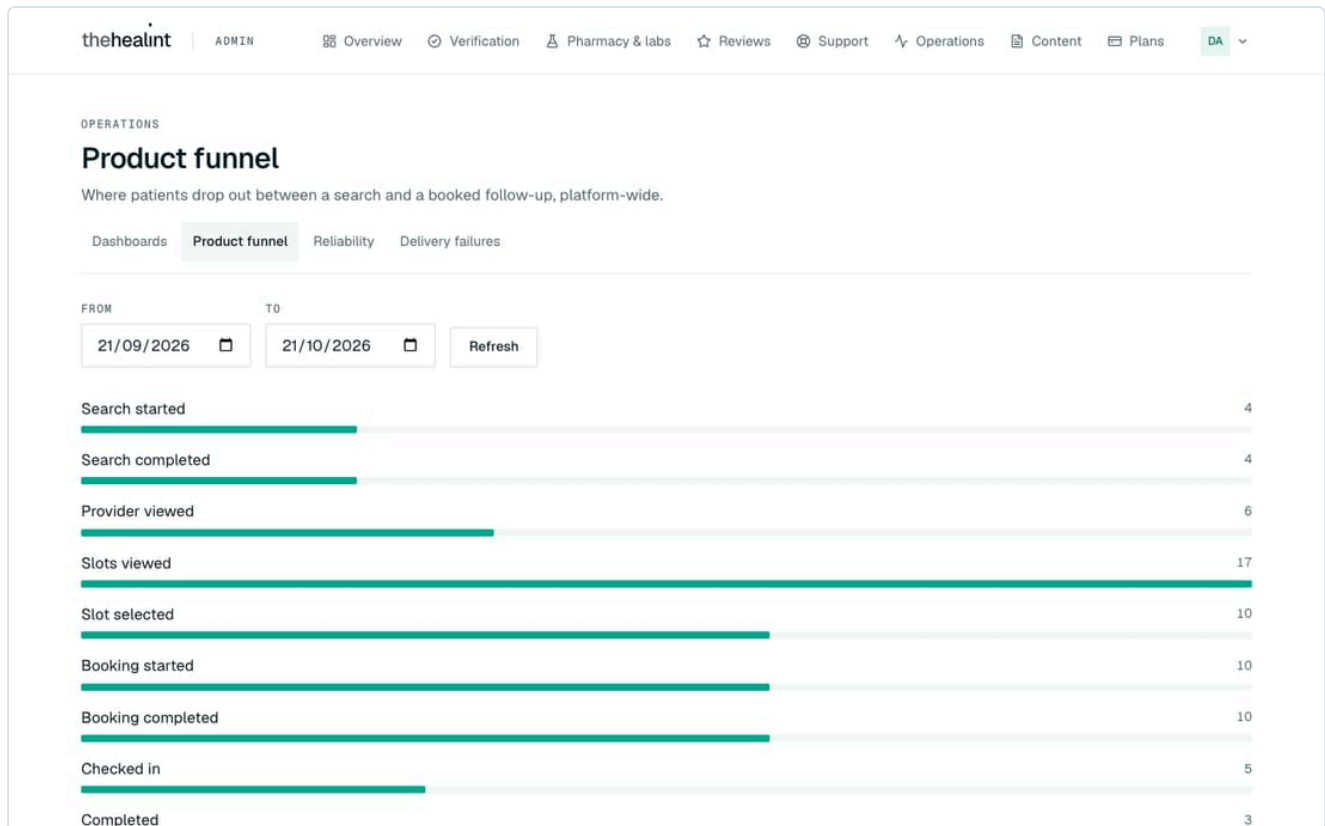
PROVIDERS (14)

All statuses

Platform dashboards: Dashboards, Product funnel and Reliability tabs; Payments and Patients tiles; the start of the Providers list.

Product funnel

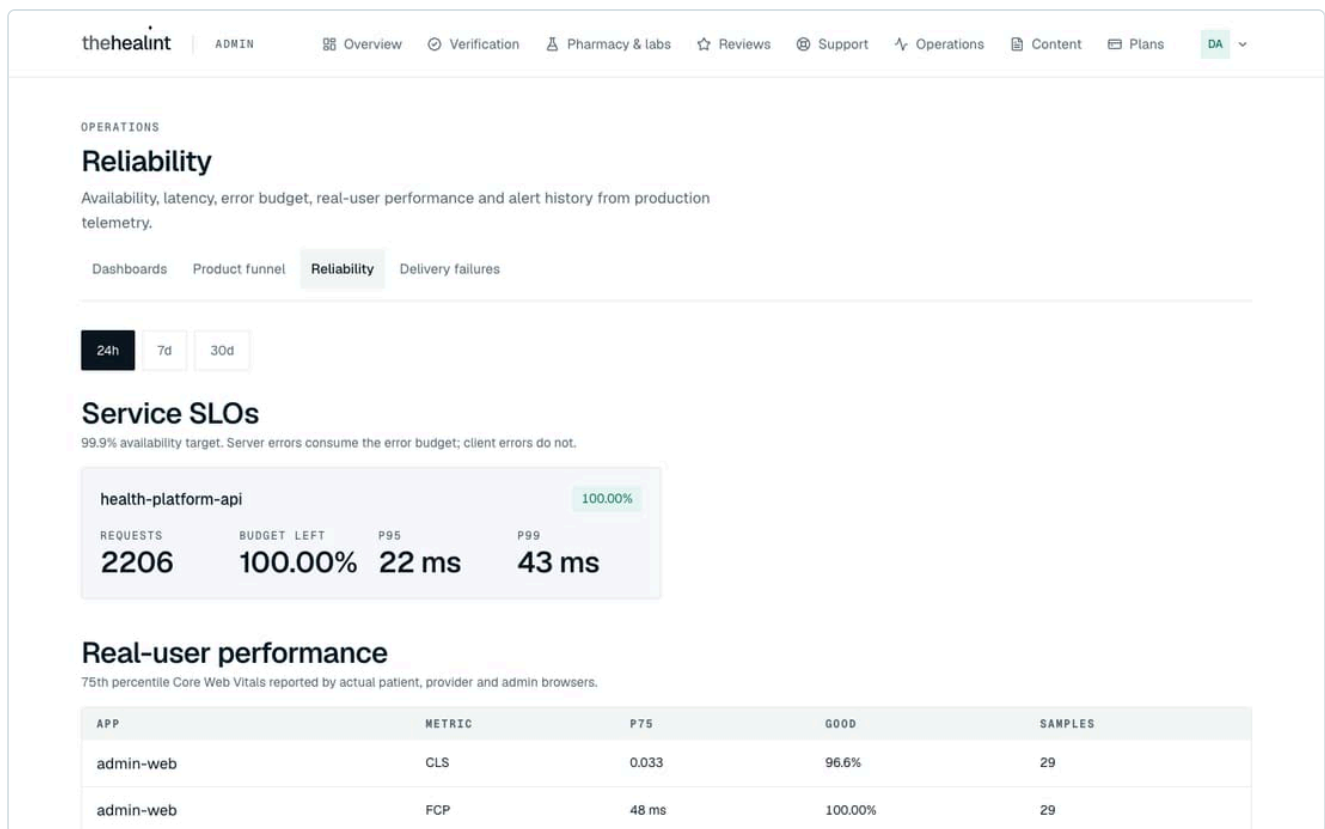
1. On Operations, click the **Product funnel** tab.
2. Set **From** and **To** dates and click **Refresh**.
3. Read the bars from top to bottom, from Search started to Follow-up booked. A big drop between two steps shows where patients give up.



Product funnel for the last month: each step from Search started down, with a count and a bar.

Reliability

1. On Operations, click the **Reliability** tab.
2. Choose a time window: **24h**, **7d** or **30d**.
3. **Service SLOs**: each service's availability against the 99.9% target. Green means on target, red means below. It also shows how many requests there were, how much error budget is left, and response times.
4. **Real-user performance**: how fast pages load for real users in each app.
5. **Alert escalation history**: alerts raised in the window.



Reliability over 24 hours: the API at 100.00% with requests, budget left, p95 and p99, then the start of the real-user performance table.

Delivery failures

1. On Operations, click **Delivery failures**.
2. Filter by **Status** (retry pending or dead-lettered), **Channel**, or search for an organization, template or error, then click **Apply filters**.
3. The table shows the organization, template, channel, attempts and error. It never shows the recipient or message payload.
4. Platform administrators can click **Replay**, read the confirmation and click **Queue replay**. The request is idempotent, continues in the background and remains linked to the original failure in the audit trail.
5. Platform support can investigate and report failures but sees **Administrator required** instead of the replay button.
6. Use **Load older failures** for the next page. A row labelled **Manual replay attempt** is the result of an earlier operator action.

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Delivery failures

Failed notifications across every organization. Recipient identity and message payload are intentionally hidden; platform administrators can safely queue a fresh attempt.

Dashboards

Product funnel

Reliability

Delivery failures

SAVED VIEWS

No saved views yet

Save current filters

STATUS

All failures

CHANNEL

All channels

SEARCH

Organization, template or error.

Apply filters

ORGANIZATION	DELIVERY	STATUS	LAST ERROR	UPDATED	ACTION
Aarogya Family Clinic	Appointment reminder Sms - 1 attempt	Retry pending	Provider rejected the sender ID.	21 Oct 2026, 1:52 pm	Replay
Aarogya Family Clinic	Prescription ready Email - 5 attempts	Dead-lettered	Mailbox unavailable (550).	21 Oct 2026, 1:52 pm	Replay

Delivery failures: filters on top, then one row per failed delivery. No recipient or message text is shown.

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Dashboards

Product funnel

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Delivery failures

SAVED VIEWS

No saved views yet

Save current filters

STATUS

All failures

CHANNEL

SEARCH

Organization, template or error.

Apply filters

Replay this delivery?

A new sms attempt will be queued for **Aarogya Family Clinic**. The original failure and this action remain in the audit trail.

Cancel

Queue replay

ORGANIZATION	DELIVERY	STATUS	LAST ERROR	UPDATED	ACTION
Aarogya Family Clinic	Appointment reminder Sms - 1 attempt	Retry pending	Provider rejected the sender ID.	21 Oct 2026, 1:52 pm	Replay
Aarogya Family Clinic	Prescription ready Email - 5 attempts	Dead-lettered	Mailbox unavailable (550).	21 Oct 2026, 1:52 pm	Replay

Replay asks for confirmation first.

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Delivery failures

Failed notifications across every organization. Recipient identity and message payload are intentionally hidden; platform administrators can safely queue a fresh attempt.

DashboardsProduct funnelReliabilityDelivery failures

SAVED VIEWS

No saved views yet

Save current filters

STATUS

All failures

CHANNEL

All channels

SEARCH

Organization, template or error.

Apply filters

Replay queued at 21 Oct 2026, 1:52 pm. Delivery will continue in the background.

ORGANIZATION	DELIVERY	STATUS	LAST ERROR	UPDATED	ACTION
Aarogya Family Clinic	Appointment reminder Sms · 1 attempt	Retry pending	Provider rejected the sender ID.	21 Oct 2026, 1:52 pm Replay queued 21 Oct 2026, 1:52 pm	Replay

After **Queue replay**, the row shows when the replay was queued.

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OPERATIONS

Delivery failures

Failed notifications across every organization. Recipient identity and message payload are intentionally hidden; platform administrators can safely queue a fresh attempt.

DashboardsProduct funnelReliabilityDelivery failures

SAVED VIEWS

No saved views yet

Save current filters

STATUS

All failures

CHANNEL

All channels

SEARCH

Organization, template or error.

Apply filters

Aarogya Family Clinic	Appointment reminder Sms · 1 attempt Manual replay attempt	Retry pending	No template registered for key "appointment.reminder".	21 Oct 2026, 1:52 pm	Administrator required
Aarogya Family	Appointment	Retry	Provider rejected the sender ID.	21 Oct 2026, 1:52 pm	Administrator

Platform support sees the same list but can't replay.

Saved views

If you often look at the same slice of failures (for example only retry-pending email), save it:

1. Set the filters and click **Apply filters**.
2. Click **Save current filters**, type a name, and tick **Share with the team** if colleagues should see it too. Click **Save view**.

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OPERATIONS

Delivery failures

Failed notifications across every organization. Recipient identity and message payload are intentionally hidden; platform administrators can safely queue a fresh attempt.

Dashboards | Product funnel | Reliability | **Delivery failures**

SAVED VIEWS

No saved views yet

Save current filters

NAME

Retry-pending email

☒ Share with the team

Save view

Cancel

STATUS

Failed, retry pending

CHANNEL

Email

SEARCH

Organization, template or error.

Apply filters

Clear

ORGANIZATION	DELIVERY	STATUS	LAST ERROR	UPDATED	ACTION
Aarogya Family Clinic	Appointment confirmed Email · 2 attempts	Retry pending	SMTP timeout while sending.	21 Oct 2026, 1:52 pm	Replay

3. Next time, pick the view from the **Saved views** list. It sets the filters for you.

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Delivery failures

Failed notifications across every organization. Recipient identity and message payload are intentionally hidden; platform administrators can safely queue a fresh attempt.

Dashboards
Product funnel
Reliability
Delivery failures

SAVED VIEWS
Retry-pending email - shared by you
Make private
Delete view
Save current filters

STATUS
Failed, retry pending
CHANNEL
Email
SEARCH
Organization, template or error.

Apply filters
Clear

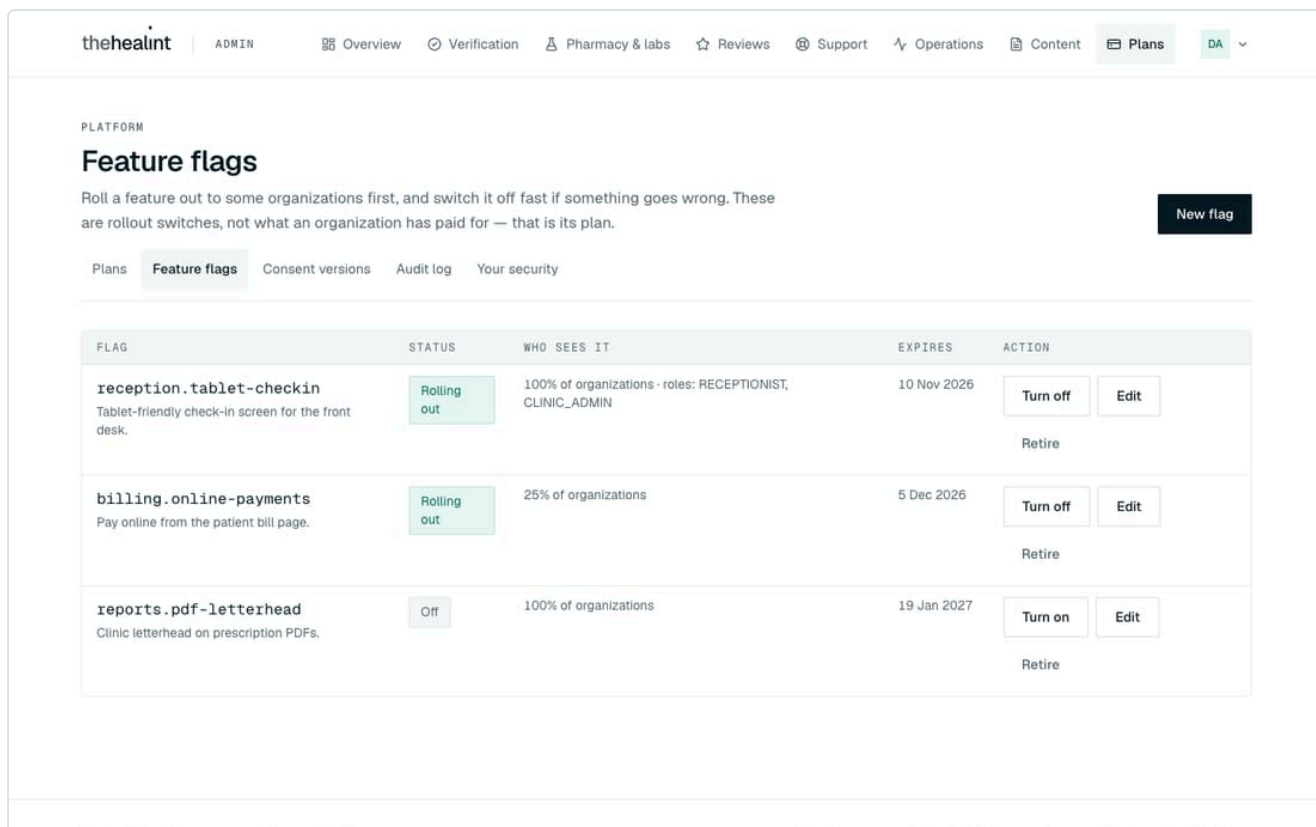
ORGANIZATION	DELIVERY	STATUS	LAST ERROR	UPDATED	ACTION
Aarogya Family Clinic	Appointment confirmed Email - 2 attempts	Retry pending	SMTP timeout while sending.	21 Oct 2026, 1:52 pm	Replay

You can **Make private**, **Share with team** or **Delete view** on views you saved. Views a colleague shared appear in your list too, but only they can change them. Views hold only the filter choices, never any delivery or patient information.

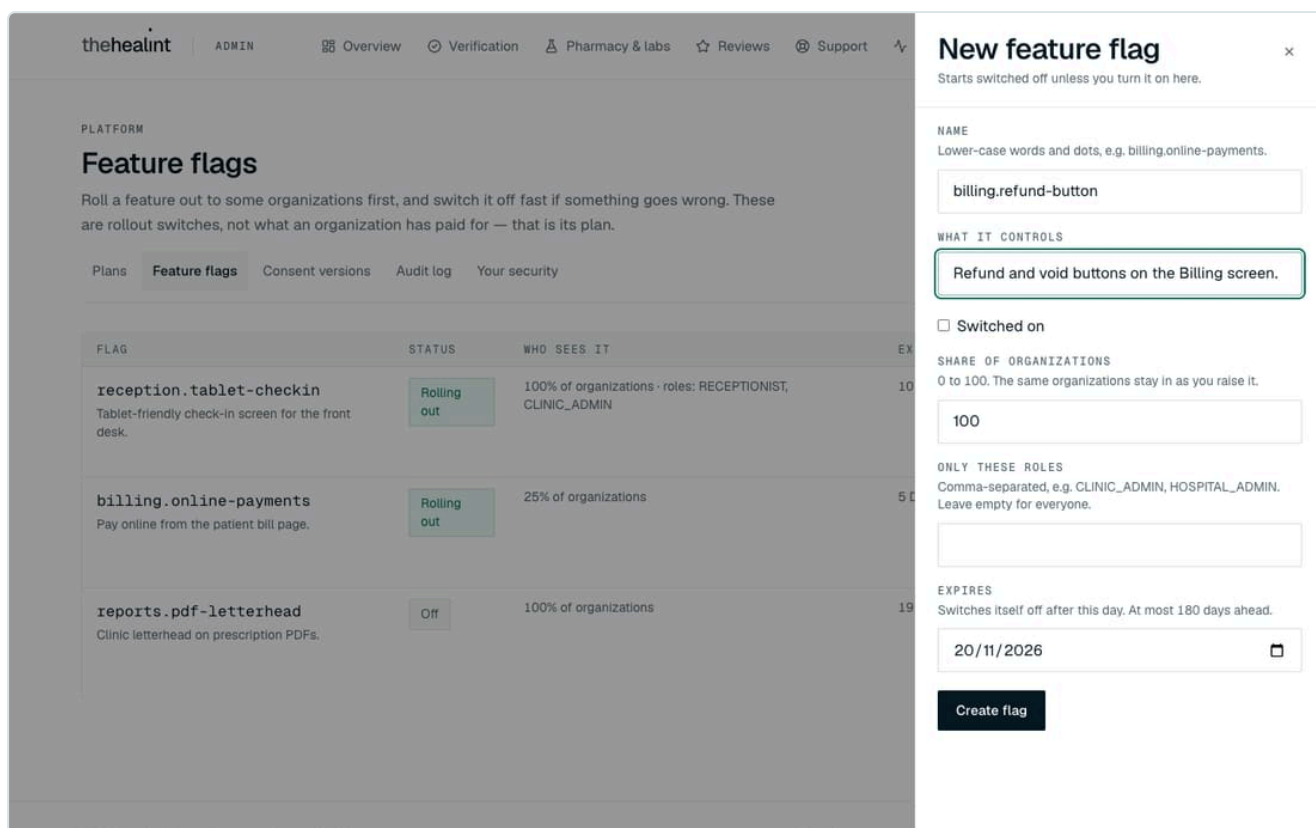
Feature flags

A feature flag lets you roll something out to a few organizations first and switch it off quickly if it goes wrong. It is **not** what an organization has paid for — that is its plan, under **Plans**. Only platform administrators see this page.

1. Open **Plans** → **Feature flags**. Each row shows the flag's name, whether it is on, who sees it, and when it expires.



- Click **New flag**. Give it a **Name** (lower-case words and dots, such as `billing.online-payments`), say **What it controls**, choose the **Share of organizations** (0–100), optionally limit it to certain **roles**, and set an **Expires** date. A flag can last at most 180 days; when it expires it switches itself off.



- Turn on** asks you to confirm and reaches the chosen organizations straight away. **Turn off** takes effect at once (within a few seconds everywhere).

4. **Edit** changes the share, roles, expiry or switch. Raising the share keeps the organizations that already had it.
5. In **Edit**, **Organization overrides** force the flag on or off for one organization, whatever the share says. Use it to let a friendly clinic try a feature early, or to keep a feature away from one organization.

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Feature flags

Roll a feature out to some organizations first, and switch it off fast if something goes wrong. These are rollout switches, not what an organization has paid for — that is its plan.

Plans **Feature flags** Consent versions Audit log Your security

FLAG	STATUS	WHO SEES IT	EXPIRES
reception.tablet-checkin Tablet-friendly check-in screen for the front desk.	Rolling out	100% of organizations · roles: RECEPTIONIST, CLINIC_ADMIN	10/12/2026
billing.online-payments Pay online from the patient bill page.	Rolling out	25% of organizations	5/12/2026
reports.pdf-letterhead Clinic letterhead on prescription PDFs.	Off	100% of organizations	19/12/2026

billing.online-payments Pay online from the patient bill page.

WHAT IT CONTROLS

Pay online from the patient bill page.

☒ Switched on

SHARE OF ORGANIZATIONS
0 to 100. The same organizations stay in as you raise it.

25

ONLY THESE ROLES
Comma-separated, e.g. CLINIC_ADMIN, HOSPITAL_ADMIN. Leave empty for everyone.

EXPIRES
Switches itself off after this day. At most 180 days ahead.

05/12/2026

Save changes

Organization overrides
Force this flag on or off for one organization, whatever the rollout says.

ORGANIZATION: Riverside Clinic FORCE IT: On

6. **Retire** removes a flag and its overrides once the feature is fully released (or abandoned). Take the check out of the code first.

Every change is recorded in the audit log. Platform support cannot see or change flags.

Keeping the legal pages current

The **Terms and conditions**, **Privacy policy** and **Cookies** pages are on the company website (thehealint.com/terms, /privacy and /cookies) and linked from every app. Each shows its **version** and **date it took effect**, a short "In short" summary, and a "Who we are" block.

That block is filled from one file in the website's code, `src/lib/legal.ts`: the company's registered name, address and corporate identity number, the grievance officer, and the privacy and support addresses. Anything not filled in shows "To be published before public launch". To list what is still missing, run `npm run legal:check` in the website's folder; it exits with an error while anything is missing, so it can gate a launch.

Before the service opens to the public:

1. Fill in every detail in `src/lib/legal.ts`.

2. Have the company's lawyer review the Terms, Privacy and Cookies wording, especially the retention periods, the 30-day response promise for data requests, the limit on liability and where data is processed.
3. Change `version` and `effectiveDate` whenever the wording changes in a way that affects people, and tell users before it takes effect.

Region settings for an organization

Each organization shows its dates, times and money in its own style. New organizations are set for India (English, rupees, India time). To change one, for example a clinic in the UK:

1. Open the organization (Operations → click its name). The **Region** card shows its language and date style, currency and time zone.

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← All providers

HOSPITAL

Aarogya Family Clinic

Aarogya Family Clinic Pvt Ltd

Verified Published 21 Oct 2026

VERIFICATION

No verification decisions yet.

DOCUMENTS

No verification documents uploaded.

BRANCHES

Aarogya Family Clinic — Koramangala
Bengaluru

PLAN

Plan Free

Status Active

Change plan

REGION

Language English (India)

Currency INR

Time zone Asia/Kolkata

Change

PHARMACIES & LABS

Aarogya Family Clinic — Koramangala — Diagnostics

Aarogya Family Clinic — Koramangala — Pharmacy

Verified

Verified

SUPPORT TICKETS

No tickets from this organization.

2. Click **Change**, pick the language and date style, the currency and the time zone, and click **Save**. Only platform administrators see **Change**.

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Aarogya Family Clinic

Aarogya Family Clinic Pvt Ltd

Verified Published 21 Oct 2026

VERIFICATION

No verification decisions yet.

DOCUMENTS

No verification documents uploaded.

BRANCHES

Aarogya Family Clinic — Koramangala
Bengaluru

PLAN

Plan Free
Status Active

Change plan

REGION

LANGUAGE AND DATE STYLE

English (India)

CURRENCY

INR

TIME ZONE

Decides what "today" is and the times staff see.

Asia/Kolkata

Save Cancel

PHARMACIES & LABS

Aarogya Family Clinic — Koramangala — Diagnostics Verified

Aarogya Family Clinic — Koramangala — Pharmacy Verified

3. The organization's staff see the new style the next time they open ProviderOS: fees and bills in the new currency, times in its time zone, and "today" decided by its clock.

What it does not change yet: appointment slots and reminders are still generated on India time, and patients see amounts in rupees. Set a non-India region only for a pilot you are watching closely.

If it doesn't work

- **A block shows an error with Retry:** click **Retry**. Each block loads on its own, so the others are still correct.
- **"No funnel events in this range.":** widen the dates. If it's still empty, ask engineering whether the analytics collector is running.
- **You need synthetic-monitoring results:** they aren't in Admin web. Ask engineering.
- **Replay is unavailable:** only a platform administrator can queue one. Platform support can still inspect and filter the failures.

How to use the audit log

The audit log records every time someone opens, downloads or changes a sensitive record: who did it, in which organization, and when. Platform admins only.

1. Click **Plans**, then the **Audit log** tab (or **Audit log** under All sections on Overview).
2. The last 7 days are shown, newest first. Each row shows the time (India time), who did it, the organization ("Platform" if none), the action (for example Record viewed, Record edited, Record downloaded), the record and a request id.

- To narrow it down, fill in any of the filters, then click **Apply filters**:
 - From** and **To** dates.
 - Action**.
 - Resource type**, written in lowercase with underscores, for example `verification_document` or `support_ticket`.
 - Actor profile id**, the full id of the person. You can copy it from an entry's details.
- Click **Clear** to remove the filters.
- Click a row to open its details on the right. You'll see the person, the organization, the record, the request and any extra context. Close it with **x**.
- If there are more entries, click **Load more** at the bottom.

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Audit log

Every sensitive access and change recorded by the API — who did it, in which organization, to which record, and when.

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FROM
Empty means the last 7 days.
dd/mm/yyyy

TO
dd/mm/yyyy

ACTION
All actions

RESOURCE TYPE
Any

ACTOR PROFILE ID
Any

Apply filters

TIME (IST)	ACTOR	ORGANIZATION	ACTION	RESOURCE	REQUEST ID
21 Oct 2026, 1:48:32 pm	Demo Platform Admin 413a9f74	Platform	Record edited	Support ticket 01a15d8a	9c998023
21 Oct 2026, 1:48:31 pm	Demo Platform Admin 413a9f74	Platform	Record edited	Support ticket 01a15d8a	e58f755a
21 Oct 2026, 1:48:31 pm	Demo Platform Admin 413a9f74	Platform	Record edited	Support ticket 01a15d8a	71dcfeff
21 Oct 2026, 1:48:18 pm	Demo Platform Admin 413a9f74	Platform	Record downloaded	Verification document 01a15d83	86764e9a

The audit log: the filter box, then entries newest first with time, actor, organization, action, resource and request id.

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FROM

Empty means the last 7 days.

dd/mm/yyyy

TO

dd/mm/yyyy

ACTION

All actions

RESOURCE TYPE

support_ticket

ACTOR PROFILE ID

413a9f74-3c4a-85d4-!

Apply filters

Clear

TIME (IST)	ACTOR	ORGANIZATION	ACTION	RESOURCE	REQUEST ID
21 Oct 2026, 1:48:32 pm	Demo Platform Admin 413a9f74	Platform	Record edited	Support ticket 01a15d8a	9c998023
21 Oct 2026, 1:48:31 pm	Demo Platform Admin 413a9f74	Platform	Record edited	Support ticket 01a15d8a	e58f755a
21 Oct 2026, 1:48:31 pm	Demo Platform Admin 413a9f74	Platform	Record edited	Support ticket 01a15d8a	71dcfeff

3 entries, all shown

Filtered to support tickets changed by one admin: "3 entries, all shown".

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Audit log

Every sensitive access and change recorded by the API — who did it, in which organization, to which record, and when.

PlansFeature flagsConsent versions**Audit log**Your security

FROM

Empty means the last 7 days.

dd/mm/yyyy

TO

dd/mm/yyyy

ACTION

All actions

RESOURCE TYPE

support_ticket

Apply filters

Clear

TIME (IST)	ACTOR	ORGANIZATION	ACTION
21 Oct 2026, 1:48:32 pm	Demo Platform Admin 413a9f74	Platform	Record edited
21 Oct 2026, 1:48:31 pm	Demo Platform Admin 413a9f74	Platform	Record edited
21 Oct 2026, 1:48:31 pm	Demo Platform Admin 413a9f74	Platform	Record edited

3 entries, all shown

Record edited

21 Oct 2026, 1:48:32 pm IST

ACTOR

Demo Platform Admin

ACTOR PROFILE ID

413a9f74-3c4a-85d4-51ec-bf33f5329821

ORGANIZATION

Platform (no organization)

RESOURCE TYPE

support_ticket

RESOURCE ID

01a15d8a-095c-7986-af27-082b05635724

REQUEST ID

9c998023-de0f-444e-bc0d-1272d1788805

ENTRY ID

01a15d8a-6170-7daf-a312-7114300ae97b

METADATA

No extra context was recorded for this entry.

An entry's details: the actor and their profile id, the organization, the resource type and id, the request id, the entry id and its metadata.

If it doesn't work

- **"Use the snake_case type, e.g. verification_document."**: write the resource type in lowercase with underscores.
- **"Paste a full profile id (a UUID)."**: copy the whole id from an entry's details. A short id won't work.
- **"The end date is before the start date."**: swap the dates.
- **"No entries match these filters."**: widen the dates or clear a filter.
- **"Your account can't read the platform audit log"**: you're signed in as platform support. Ask a platform admin.

How to look after content

Reference data

Reference data is the shared lists that every clinic profile and every patient search uses: specialties, services, symptom terms, search synonyms, cities and localities.

1. Click **Content**. The **Reference data** tab opens.
2. Choose a list: **Specialties**, **Services**, **Symptom terms**, **Search synonyms**, **Cities** or **Localities**.
3. To add an entry, fill in the form below the list and click the add button, for example **Add specialty**. For a specialty, the **Key** is a short lowercase label that never changes (for example `dermatology`); the **Name** is what people see.
4. Specialties and services can also be edited: click one in the list, change it and click **Save changes**. The other lists can only be added to.

The screenshot shows the 'thehealint' platform admin interface. The top navigation bar includes 'ADMIN', 'Overview', 'Verification', 'Pharmacy & labs', 'Reviews', 'Support', 'Operations', 'Content' (active), 'Plans', and a user profile 'DA'. The main content area is titled 'CONTENT' and 'Reference data'. Below this, there's a sub-header 'The platform-wide vocabularies every tenant's profile and every patient's search resolve against.' and two tabs: 'Reference data' (active) and 'Knowledge base'. Under 'Reference data', there are six sub-tabs: 'Specialties' (active), 'Services', 'Symptom terms', 'Search synonyms', 'Cities', and 'Localities'. The 'Specialties' tab displays a list of existing specialties with their keys in lowercase: Cardiology, Dentistry, Dermatology, Diagnostics & Imaging, Emergency Medicine, and Endocrinology. At the bottom, there is a form to add a new entry with three columns: 'KEY' (Stable, lowercase; referenced by search.), 'NAME', and 'DESCRIPTION' (Optional.). Each column has a corresponding text input field.

Reference data, Specialties tab: each specialty with its key, and the Key / Name / Description form for adding a new one.

If it doesn't work: "A branch cannot be placed until its city exists." means a clinic is waiting for a city. Add it under **Cities**, then its areas under **Localities**.

Knowledge base

Knowledge base articles are care-navigation guides. Each one moves through steps: Draft, then In review, then Approved, then Published, and later Archived.

1. Click **Content**, then the **Knowledge base** tab.
2. To write an article, click **New article** and fill in **Title**, **Content** and **Specialty keys** (for example dermatology). Click **Create draft**.
3. Click the article in the list to open it. Click **Save changes** after editing.
4. Move it on one step at a time with the button at the bottom: **Submit for review**, then **Approve**, then **Publish**, and later **Archive**. While an article is in review or approved, **Send back to draft** returns it for more work. Publish, Archive and Send back to draft each ask you to confirm.

Read the yellow warning at the top of the page: articles have not been clinically reviewed yet, so don't treat anything here as medical advice.

thehealint | ADMIN | Overview | Verification | Pharmacy & labs | Reviews | Support | Operations | Content | Plans | DA

CONTENT

Knowledge base

Care-navigation articles, moved one step at a time from draft to published.

Reference data | **Knowledge base**

New article

Not clinically reviewed. LL-03 (the clinician advisor) has not been contracted yet — every article here, at every status including PUBLISHED, is engineering-authored placeholder content. Do not treat anything published through this screen as clinically authoritative.

No articles yet.
Write the first draft in the form beside this.

TITLE

CONTENT

Knowledge base with no articles: the "Not clinically reviewed" warning and the Title / Content / Specialty keys form.

The screenshot shows the 'thehealint' admin dashboard. The top navigation bar includes 'ADMIN' and several menu items: Overview, Verification, Pharmacy & labs, Reviews, Support, Operations, Content, Plans, and a dropdown menu labeled 'DA'. On the left, a card displays 'Runbook demo: when to see a dermatologist' with a 'Draft' button. The main editing area on the right contains a 'TITLE' field with the same text, a 'CONTENT' text area with the text 'See a dermatologist for a rash that lasts more than two weeks, a mole that changes shape or colour, or acne that does not settle with over-the-counter care.', and a 'SPECIALTY KEYS' field with 'dermatology'. Below these fields is a 'Save changes' button. At the bottom of the editing area, there is a status bar showing 'Draft', '1 chunk(s) embedded', and a 'Submit for review' button.

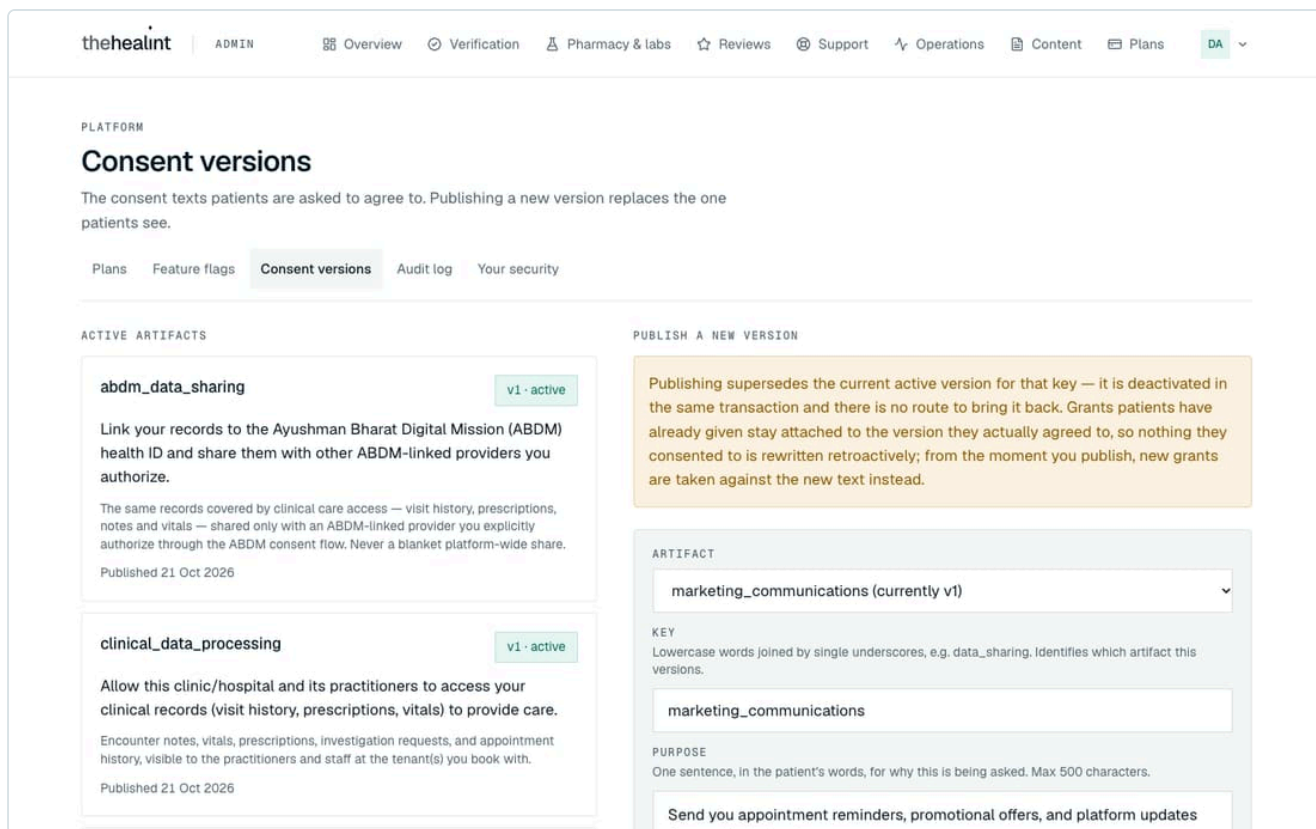
A draft article open for editing, with Save changes and, at the bottom, its Draft status and the next step: Submit for review.

Consent versions

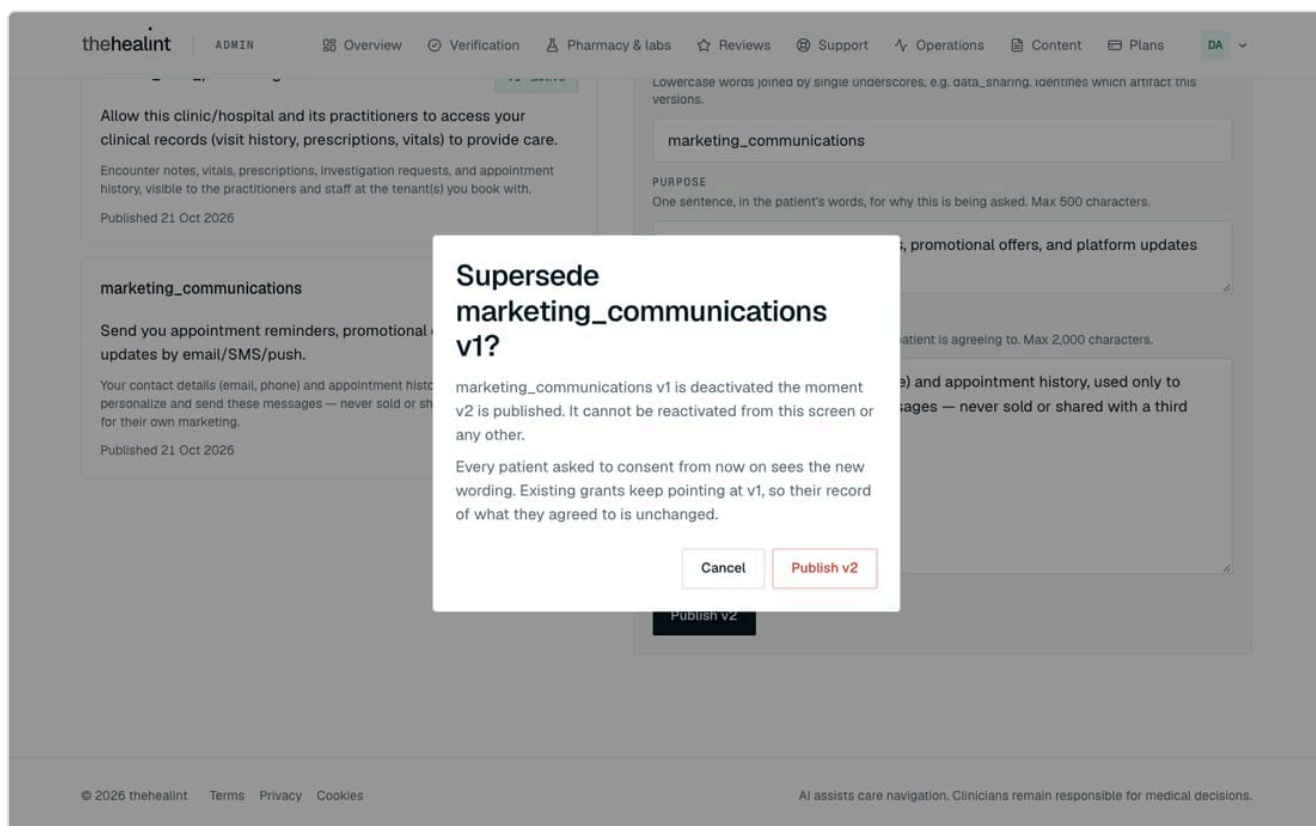
Consent versions are the texts patients agree to, such as data sharing or marketing messages. You never edit a consent text: you publish a new version, and it replaces the old one. Platform admins only.

1. Click **Plans**, then the **Consent versions** tab.
2. **Active artifacts** lists the current texts, each with its version (for example "v1 · active").
3. Under **Publish a new version**, pick the text in **Artifact**, or choose **New artifact...** for a brand-new one.
4. Check or write the **Key** (lowercase words joined by underscores), the **Purpose** (one sentence, in the patient's words) and the **Scope** (exactly what's covered).
5. Click **Publish v2** (the number is the next version). Read the box carefully and confirm.

What happens: the old version is switched off for good, and every patient asked from now on sees the new text. Patients who already agreed stay linked to the version they actually agreed to.



Consent versions: the active texts on the left, the warning about superseding, and the form with `marketing_communications` chosen.



"Supersede marketing_communications v1?": v1 is deactivated when v2 is published, and can't be brought back.

If it doesn't work: the publish button stays greyed out until the key, purpose and scope are all valid. Check the hints under each box.

Marketing admin (hi-home)

The marketing website, hi-home, is a separate site with its own admin area. It is not part of Admin web. It's for the marketing team to read the messages people send through the website.

What comes in

- **Contact enquiries:** a name, email, mobile number and message.
- **Job applications:** for developer or sales roles, with experience, location, a short "about" and an optional portfolio link. There are no CV uploads.

Nobody gets an email when one arrives: not the person who sent it, and not the team. If the site is set up to forward submissions somewhere else, each one is passed on automatically. If forwarding fails, the site retries once a day.

How to read submissions

1. Go to the marketing site's restricted **Submissions** page.
2. Click **Continue with Google SSO** and sign in with your work Google account.
3. Your account must have the marketing admin role. Otherwise you'll see "This identity does not have the `marketing_admin` role."
4. Complete the authenticator check, which is required here. The first time, scan the QR code with your authenticator app. Then enter the **Six-digit code** and click **Verify and continue**.
5. The page shows how many enquiries and applications there are. Use the tabs **Enquiries**, **Applications** and **Delivery failures**, and the search box to find one. Email addresses and phone numbers are links you can click.
6. If a submission failed to forward, open **Delivery failures** and click **Replay now** to try again. It shows "Replayed" or "Replay failed".

Submissions are read-only. You can't mark them as handled, assign them, add notes or export them. Every view is recorded.

If it doesn't work

- **"Not connected to the database" or "Database unreachable":** the site can't reach its storage. Tell engineering.
 - **You need the marketing admin role:** it has to be added to your account by hand. Ask engineering.
-

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

You want to...	What to do
Add or remove a platform staff member, or change their role	There's no screen for this. Ask engineering.
Reset your authenticator after losing your phone	Ask engineering to remove the authenticator from your account, then set it up again.
Verify an individual doctor	Not done on the platform. Only organizations, pharmacies, labs and their professionals are verified.
Undo a suspended pharmacy or lab	There's no "reinstate" button. Ask engineering.
Reopen a closed support ticket	Not possible. Ask the person to raise a new ticket.
Assign a ticket to a colleague or set a priority	Not supported yet. Agree it with your team outside the tool.
Tell an operator about a facility, professional or review decision	No email is sent for these. Contact them directly.
Create or edit a plan in the catalogue, or schedule a plan change	Not supported here. Ask engineering or product.
See synthetic monitoring results	They run outside Admin web. Ask engineering.
Get a second person to approve a knowledge base article	Not enforced. The same person can write, approve and publish, so agree a review process with your team.
Anything platform-admin-only while signed in as support	Ask a platform admin.

Quick reference

Task	Where	Who	Key button
Decide a plan request	Plans → Plan requests	Admin	Approve / Decline
See what's waiting	Overview (Work inbox)	Admin, support	—
Investigate failed notifications	Operations → Delivery failures	Admin, support	Apply filters
Replay a failed notification	Operations → Delivery failures	Admin	Replay → Queue replay
Set up two-factor	Account menu → Your security	Admin, support	Set up two-factor authentication → Confirm
Verify an organization	Verification → organization	Admin	Approve / Reject → Reject application
Verify a pharmacy, lab or professional	Pharmacy & labs	Admin	Verify / Reject / Suspend (note required)

Task	Where	Who	Key button
Look up an organization	Operations → Providers → name (Tenant 360)	Admin	Review, Change plan
Moderate a review	Reviews	Admin, support	Publish review / Hide review (reason required)
Answer a ticket	Support	Admin, support	Send reply, Mark IN_PROGRESS → RESOLVED → CLOSED
Change a plan	Plans → Tenants	Admin	Change plan / Assign plan
Check health	Operations → Dashboards / Product funnel / Reliability	Admin, support	Refresh, 24h / 7d / 30d
Check who did what	Plans → Audit log	Admin	Apply filters, click a row
Add reference data	Content → Reference data	Admin, support	Add specialty (and so on)
Publish an article	Content → Knowledge base	Admin, support	Create draft → Submit for review → Approve → Publish
Publish a consent version	Plans → Consent versions	Admin	Publish <i>vn</i>
Read marketing submissions	hi-home Submissions page	Marketing admin	Continue with Google SSO, Replay now