

Clinic admin: running the organization in ProviderOS

Who this is for

This document covers the people who own and configure a provider organization: the **Clinic admin**, the **Hospital admin** and the **Facility manager**. It follows the real code from creating an account and an organization through verification, publishing to the marketplace, adding staff and doctors, setting up branches, departments and weekly hours, and on to the oversight pages: notification delivery, security, covering-access review, analytics and pharmacy/diagnostics fulfilment. Anything missing or half-built is called out as such. It is not described as working.

Where they work

All of this happens in **ProviderOS web** (`apps/provider-web`). ProviderOS admits every staff role but shows each one only its own screens (`apps/provider-web/src/lib/access.ts` ; the front-desk, doctor and pharmacy/lab menus are in `03-front-desk.md`, `02-doctor.md` and `05-pharmacy-lab.md`). The roles in this document get the full top navigation: **Today**, **Reception**, **Calendar**, **Patients**, **Billing**, **Fulfilment**, **Analytics**, **Settings**, and land on Today.

The Settings section has its own sub-navigation: **Staff**, **Branches**, **Departments**, **Practitioners**, **Weekly availability**, **Verification documents**, **Notification delivery**, **Security**, **Covering access**. **Staff** and **Covering access** are listed only for Clinic and Hospital admins; a Facility manager has every other screen, and opening either of those two shows "Not part of your role". `/settings` redirects to Branches and `/fulfillment` redirects to Pharmacy.

ProviderOS mobile (`apps/provider-mobile`) is a narrow companion. Its tabs depend on the role: **Overview** and **Branches** for admins and facility managers, **Calendar** for them and the front desk, **Pharmacy & labs** for them and pharmacy/lab roles. Everything else is web-only.

Which role a founder gets depends on the organization type chosen at sign-up. Clinic and Individual doctor create a **Clinic admin**. Hospital and Chain create a **Hospital admin**. Pharmacy and Diagnostic laboratory create a Pharmacy admin or Lab admin (see `05-pharmacy-lab.md`). Clinic admin and Hospital admin carry **identical** permissions. Only the label differs. Every other role, including **Facility manager**, is given to a person by an admin under **Settings** → **Staff** (section 8).

At a glance

Journey	Where	Outcome
Create an account and organization	ProviderOS sign-in → Create an account → onboarding	Organization created with status Submitted; creator becomes its admin
Upload verification documents	Settings → Verification documents	Documents stored for the platform reviewer
Publish / unpublish	Today → Publish to marketplace / Unpublish	Organization appears in (or leaves) patient search; only once Verified
Add branches with a map pin	Settings → Branches	Bookable locations with coordinates
Add departments	Settings → Departments	Units per branch, optionally tied to a marketplace specialty
Add a doctor	Settings → Staff → Add a person (role Doctor)	Practitioner record and branch affiliation with a fee; the doctor is invited
Doctor profile and branch affiliation	Settings → Practitioners	Admin's own practitioner profile, fee and department per branch
Weekly hours and time off	Settings → Weekly availability	Hours drawn on a week grid or added by time, removable; one-off time off per date
Add and manage staff	Settings → Staff (Clinic / Hospital admin only)	Person added with a role and emailed a set-password link; roles suspended, reactivated or removed
Add many staff from a CSV	Settings → Staff → Add from a spreadsheet	Preview (no changes) → confirm → per-line report. <code>POST /api/v1/staff/import/preview</code> and <code>/import</code> (Idempotency-Key, ≤ 200 lines, <code>expectedReady</code> guard); roles limited to what the importer may add (facility admins: their one role); audited
Notification delivery	Settings → Notification delivery	Counts of pending/sent/failed/dead-lettered, list of failures
Security / two-factor	Settings → Security (also the account menu)	Authenticator app enrolled; challenge enforced on every ProviderOS sign-in
Covering-access review	Settings → Covering access (Clinic / Hospital admin only)	Log of colleagues opening another doctor's patient, with reasons
Analytics	Analytics	ROI metrics and breakdowns, on the Growth plan only

Journey	Where	Outcome
Subscription / plan	Analytics (read-only gate)	Plan name shown; changing plan is platform-admin only
Pharmacy and diagnostics fulfilment	Fulfilment → Pharmacy / Diagnostics	Facilities registered and submitted; consented orders fulfilled
Multi-branch switching	Branch selector in the top bar	Reception, Calendar, walk-ins and the waiting badge scoped to one branch

1. Create an account and the organization

1. **ProviderOS sign-in card** → **Setting up a new clinic? Create an account** → **Email + Password** → **Create account**.
 - Email only. Entering a phone number gives "Create an account with email for now. Phone signup needs SMS verification."
 - Password under 8 characters gives "Choose a password with at least 8 characters."
 - Email confirmation is off, so the session starts immediately.
2. **"What should we call you?"** → full name → **Continue**. This creates the profile (`POST /api/v1/me`) and refreshes the session token.
3. With no organization yet, every URL shows the onboarding wizard and the navigation is empty. The heading reads **Step 1 of onboarding**, "Set up your organization" ("You become its founding admin automatically...").
4. Fill in:
 - **Organization type**: Individual doctor, Clinic, Hospital, Chain, Independent pharmacy, or Diagnostic laboratory.
 - **Legal name** ("As registered with the medical council / ROC").
 - **Display name** ("Shown to patients").
 - **Slug** ("Your address on the marketplace — e.g. sunrise-clinic-hsr"), lower-cased as you type.
5. **Create organization** ("Creating...") → `POST /api/v1/tenants` . In one transaction the system:
 - creates the organization with verification status **Submitted** and not published;
 - adds the creator as Clinic admin or Hospital admin (by type);
 - writes the first verification event, "Initial submission at tenant creation."
6. The session token is refreshed so the new organization's permissions apply. The app then opens **Today**.
 - Error: the server's message, or "Could not create your organization." (for example, a slug that is already taken).
7. **There is no step 2**. The wizard is a single form. Branches, documents and doctors are set up afterwards from Settings.

2. Verification documents

1. **Settings** → **Verification documents** → "A platform admin needs at least one of these to mark the organization verified — which is what unlocks publishing to the marketplace."
2. **Uploaded** → GET `/api/v1/tenants/:id/verification-documents`. Each row shows the type and file name, with a **View** button. View fetches a 5-minute signed link and opens it in a new tab.
 - Empty: "Nothing uploaded yet. Until one is here, verification cannot start."
3. **Upload a document** → **Document type**: Registration certificate, Medical council ID, Address proof, Identity proof, or Other. Then **File** ("PDF or image") → **Upload document** ("Uploading...") → POST `/api/v1/tenants/:id/verification-documents`.
4. A platform admin reviews the organization in Platform Admin (see [06-platform-admin.md](#)) and moves it to **Under review**, **Verified** or **Rejected**.
5. **Rejected**: the documents page shows **Verification needs changes**, including the latest reviewer's note. **Submit for review again** is disabled until at least one document has an `uploadedAt` later than the rejection event.
6. Upload corrected evidence, then click **Submit for review again** → PATCH `/api/v1/tenants/:id/verification/resubmit` (needs `tenant.verification.submit`). The server locks the tenant row, accepts only REJECTED, re-checks the newer-document condition, changes it to SUBMITTED and appends a REJECTED → SUBMITTED verification event in one transaction. The existing platform-admin pending-review query immediately puts it back in the Work inbox. A repeated click is refused because the tenant is no longer Rejected.
7. Back on **Today**, the **Verification history** list shows each change with time and the reviewer's notes. Statuses read in plain words ("Submitted → Verified").
8. **Notifications**: when a platform admin approves or rejects the organization, every active Clinic admin and Hospital admin is emailed.
 - Approved (`tenant.verified`): "*Organization* is verified on thehealint" — "Publish it from ProviderOS (Today → Publish) to start appearing in patient search.", plus the reviewer's note if there is one.
 - Rejected (`tenant.rejected`): "*Organization*: verification needs changes" — "What to fix: *note*", then "Update your documents in ProviderOS (Settings → Verification documents) and submit again."
9. Documents cannot be deleted or replaced. A new upload is added alongside the old ones.

3. Publish and unpublish (Today)

thehealint PROVIDEROS Today Reception 3 Calendar Billing Fulfilment Analytics Settings DA

Sunrise Multispecialty Hospital BRANCH All branches

TODAY

Sunrise Multispecialty Hospital

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

Unpublish

Verified Published to marketplace Sunrise Multispecialty Hospital Pvt Ltd · Hospital

TODAY AT A GLANCE

APPOINTMENTS 15	WALK-INS 0	NO-SHOWS 0	AVG WAIT 0 min
COMPLETED 15	BILLED ₹11250.00	COLLECTED ₹0.00	OUTSTANDING ₹11250.00

VERIFICATION HISTORY

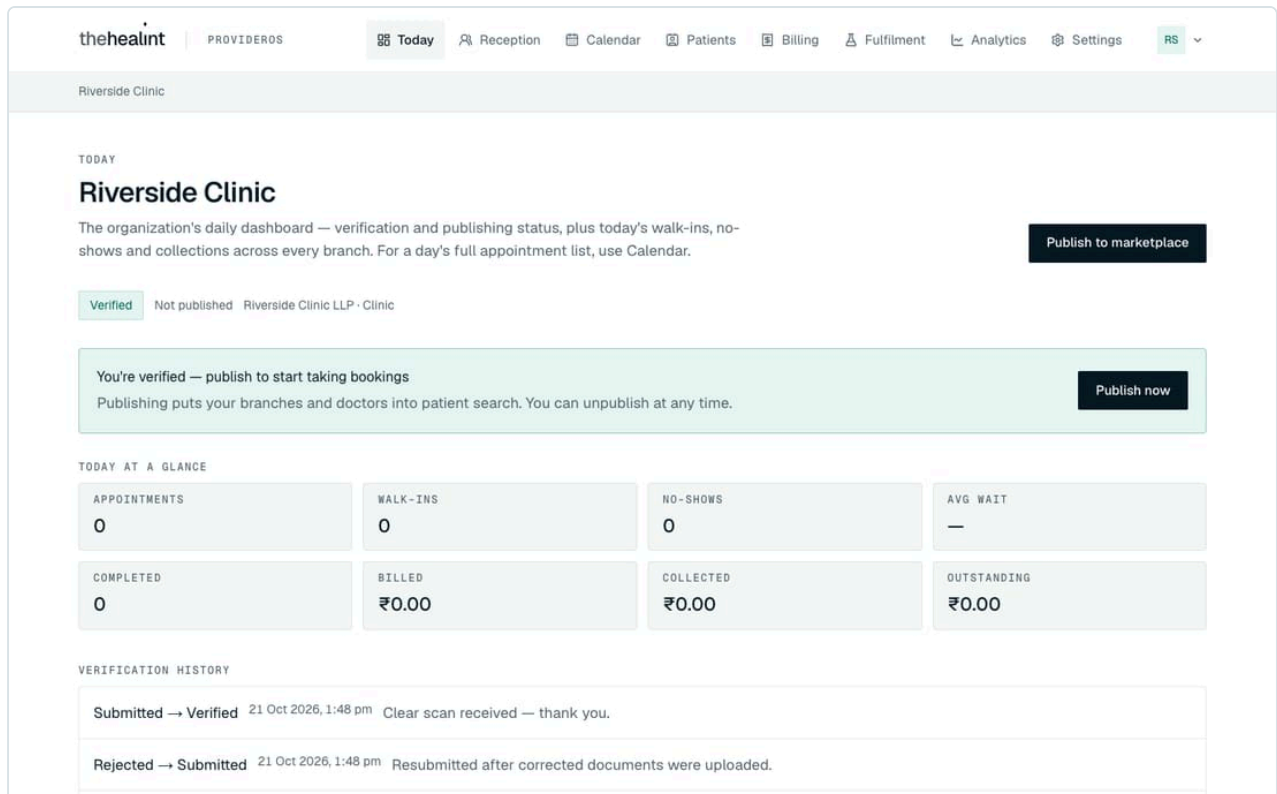
No verification events yet

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

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*ProviderOS (desktop) — Today for a hospital: the Branch selector ("All branches") in the organization bar, the Verified pill, "Published to marketplace", **Unpublish**, the eight Today-at-a-glance tiles, and an empty Verification history ("No verification events yet").*

1. **Today** → the header shows the display name. Under it are a verification pill (**Submitted**, **Under review**, **Verified** or **Rejected**), "Published to marketplace" or "Not published", and "*legal name* · *type*". Below that, one next step in words: **Verified and not published** → a green card "You're verified — publish to start taking bookings" with **Publish now**; **Rejected** → "Verification needs changes" with **Open verification documents**; **Submitted / Under review** → "A platform admin is reviewing your organization..."



*ProviderOS (desktop) — Today for a just-verified clinic: the green "You're verified" card with **Publish now**, and the history in plain words.*

2. If not Verified and not published, **Publish to marketplace** is disabled. The page explains: "Publishing unlocks once a platform admin marks this organization verified — upload your verification documents under Settings."
3. **Verified** → **Publish to marketplace** ("Saving...") → `PATCH /api/v1/tenants/:id/publish`. The status line changes to "Published to marketplace" and the button becomes **Unpublish**.
 - The database also enforces this. A publish attempt before verification returns "This tenant cannot be published until its verification_status is VERIFIED."
4. **Unpublish** → dialog "Unpublish from the marketplace?" ("Name stops appearing in patient search immediately. Existing appointments are unaffected, but nobody can book a new one until you publish again.") → **Unpublish** → `PATCH /api/v1/tenants/:id/unpublish`.
5. Today also shows the day's tiles (appointments, walk-ins, no-shows, avg wait, completed, billed, collected, outstanding) across all branches. See [03-front-desk.md](#).

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TodayReception2CalendarPatientsBillingFulfilmentAnalyticsSettingsDA

Sunrise Multispecialty HospitalBRANCHAll branches

TODAY

Sunrise Multispecialty Hospital

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

Unpublish

Verified

Published to marketplaceSunrise Multispecialty Hospital Pvt Ltd · Hospital

TODAY AT A GLANCE

APPOINTMENTS4

WALK-INS0

NO-SHOWS0

AVG WAIT0 min

COMPLETED4

BILLED₹3000.00

COLLECTED₹0.00

OUTSTANDING₹3000.00

VERIFICATION HISTORY

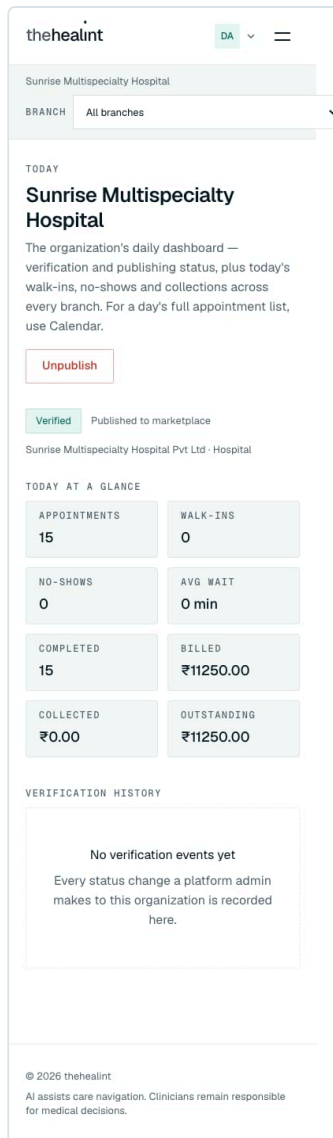
No verification events yet

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

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ProviderOS (1024 px, tablet) — the same page; the top bar drops its icons to fit all eight items, including Patients.



ProviderOS (phone width) — the tiles go two-by-two and Unpublish moves under the heading, but the Branch selector runs past the right edge, so the page scrolls sideways.

4. Branches, with the location picker

1. **Settings** → **Branches** → "Every physical location you see patients at. Patients search by distance, so the pin matters as much as the address."
2. **Existing branches** → name and "locality, city". The primary branch is marked **Primary**.
 - Empty: "No branches yet. Add your first one below — you cannot take bookings without one."
3. **Add a branch** → **Branch name**, **Address line 1**, **Locality**, **City**, **State**, **Pincode**.
4. **Location picker**:
 - Type into "Search an address to jump the map there..." → **Find** ("Finding..."). The address is looked up on OpenStreetMap (Nominatim, India only), and the map centres and drops the pin there.
 - No match: "No match found — place the pin manually instead." Lookup failure: "Could not look up that address — place the pin manually instead."

- Or tap the map to place the pin, then drag to adjust. The map starts centred on India.
 - With no pin: "Tap the map (or search an address) to place and confirm your pin." With a pin: "Pin confirmed at *lat, lng* — drag it to adjust."
5. **Add branch** is disabled until a pin exists ("Confirm your location on the map before adding this branch.") → `POST /api/v1/branches`. The list and the global branch selector reload.
6. Branches **cannot be edited or removed from the UI**, although the API has `PATCH /api/v1/branches/:id`.

5. Departments

1. **Settings** → **Departments** → "The units a branch is organised into — Cardiology, Paediatrics, Emergency..."
 - With no branches: "No branches yet. A department belongs to one branch. Add a branch under Settings → Branches first."
2. **Branch** selector (only shown when there is more than one branch; this one is independent of the top-bar branch scope) → **Departments at this branch**, with a count pill.
 - Empty: "No departments at this branch. Most clinics never need one..."
3. **Add a department** → **Department name** (at least 2 characters) → **Marketplace specialty** (optional; "No specialty link" is the default) → **Add department** → `POST /api/v1/departments`.
4. Departments cannot be renamed or removed from the UI.

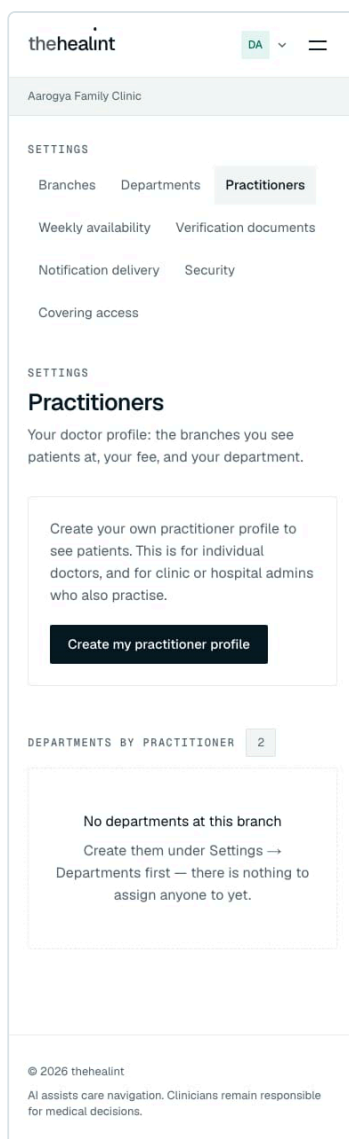
6. Practitioners (doctors)

The screenshot shows the 'thehealint' ProviderOS interface. The top navigation bar includes 'Today', 'Reception' (with a count of 4), 'Calendar', 'Billing', 'Fulfilment', 'Analytics', 'Settings' (active), and a user profile 'DA'. The main header identifies the user as 'Aarogya Family Clinic'. On the left, a 'SETTINGS' sidebar lists 'Branches', 'Departments', 'Practitioners' (selected), 'Weekly availability', 'Verification documents', 'Notification delivery', 'Security', and 'Covering access'. The main content area is titled 'Practitioners' under 'SETTINGS' and includes the subtitle 'Your doctor profile: the branches you see patients at, your fee, and your department.' A large box prompts the user to 'Create your own practitioner profile to see patients. This is for individual doctors, and for clinic or hospital admins who also practise.' with a 'Create my practitioner profile' button. Below this, a section 'DEPARTMENTS BY PRACTITIONER' shows a count of 2, followed by a message: 'No departments at this branch. Create them under Settings → Departments first — there is nothing to assign anyone to yet.'

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ProviderOS (desktop) — Settings → Practitioners: the Settings side menu, the **Create my practitioner profile** card, and "Departments by practitioner" (2) showing "No departments at this branch".



ProviderOS (phone width) — the Settings side menu becomes a wrapped row of links above the page.

The page lead is "Your doctor profile: the branches you see patients at, your fee, and your department." **It manages the signed-in admin's own doctor profile only.**

1. **Create my practitioner profile** ("Create your own practitioner profile to see patients. This is for individual doctors, and for clinic or hospital admins who also practise.") → POST `/api/v1/practitioners` with the admin's own profile.
2. The page then shows **Practitioner id** (a raw id) and **Branch affiliations**.
 - Empty: "Not affiliated with any branch yet. An affiliation is what carries the consultation fee, the weekly schedule and the department."
3. **Affiliate with a branch** → **Branch, Consultation fee (₹), Department** (optional, only that branch's departments) → **Affiliate with branch** → POST `/api/v1/practitioner-branches`. Each new affiliation is listed as "₹fee", "Affiliation *id* · branch *id*".

4. **Departments by practitioner** (survives reloads, covers every doctor at a branch) → pick a **Branch** → each doctor appears with name, fee and "not currently accepting bookings" if inactive, plus a department dropdown. Changing the dropdown saves immediately (`PATCH /api/v1/practitioner-branches/:id/department`).
 - "No departments at this branch. Create them under Settings → Departments first..." / "No practitioners at this branch. Affiliate one above before assigning departments."
5. **Other doctors are added from Settings** → **Staff** (section 8), which creates their practitioner record and first branch affiliation. This page still manages only the signed-in admin's own profile. The profile and affiliation cards are not reloaded from the server, so after a page refresh the page shows **Create my practitioner profile** again, even for an admin who already has one (see Gaps).

7. Weekly availability (`/settings/schedule`)

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*ProviderOS (desktop) — Weekly availability for Dr. Meera Iyer, with hours drawn on Monday and the **Add hours on Monday?** dialog open ("Dr. Meera Iyer becomes bookable every Monday at this branch during these hours.", From, Until, Appointment length, **Cancel** / **Add these hours**). Below: **Hours set** (Monday–*

Saturday 10:00 AM–6:00 PM, 20-minute appointments, each with **Remove**), **Add hours by time**, and **Time off** ("No time off set for Dr. Meera Iyer here.") with its form. In this full-page capture the sticky top bar is drawn across the middle of the page, over the Branch and Doctor pickers.

1. **Settings** → **Weekly availability** → "When each doctor can be booked. Hours are set per branch, so a doctor can keep different hours at two branches."
2. Pick a **Branch** (shown when there is more than one; defaults to the top-bar branch scope or the first branch) → **Doctor** (names, with "(inactive)" where relevant) → GET `/api/v1/branches/:id/practitioners`.
 - "No doctors at this branch yet. Add a doctor to this branch under Settings → Practitioners, then set their hours here."
3. **Week grid** ("*Doctor* — this week") → GET `/api/v1/practitioner-branches/:id/schedule-rules`. One column per day, Monday to Sunday, on an hourly scale; existing hours are shaded blocks reading "*start end n min*".
 - With no hours at all: "No hours set yet — patients can't book *doctor* here until at least one day has hours."
4. **Draw hours**. "Drag down an empty part of a day to add hours there — or tap where they start, then where they end." After the first tap the line reads "Starting *day* at *time* — now tap where these hours end." with **Cancel**.
 - A dialog asks "**Add hours on *day*?**" ("*Doctor* becomes bookable every *day* at this branch during these hours."), with **From**, **Until** and **Appointment length** to adjust → **Add these hours** → POST `/api/v1/schedule-rules`. A toast reads "Hours added for *doctor* on *day*".
5. **Hours set** lists every rule as "*Day* · *start–end* · *n*-minute appointments" with **Remove**.
 - **Remove** → dialog "Remove *day start–end*?" ("New bookings in these hours stop at once. Appointments already booked in them stay on the calendar.") → **Remove hours** → DELETE `/api/v1/schedule-rules/:id`. Toast: "*Day start–end* removed".
 - Under the list: "To change hours, remove them and draw the new ones." There is no in-place edit.
6. **Add hours by time** is the same as drawing, as a form: **Day**, **Appointment length** (10, 15, 20, 30, 45 or 60 minutes), **From**, **Until** → **Add hours for *doctor***.
7. **Time off** → GET `/api/v1/practitioner-branches/:id/schedule-exceptions`.
 - Each upcoming entry shows the date and either "Not available all day" (**Day off**) or "Only *start–end*" (**Different hours**), with **Remove** → DELETE `/api/v1/schedule-exceptions/:id`. Toast: "*date* follows the weekly hours again". This remove has no confirmation dialog. Past dates are hidden behind "Show *n* past dates".
 - Empty: "No time off set for *doctor* here." (or "No upcoming time off.").
 - Add: **Date**, **What changes** (**Whole day off** or **Different hours**, which adds From and Until), **Reason** ("Optional — kept with the time off for the clinic's reference") → **Add time off for *doctor*** → POST `/api/v1/schedule-exceptions`. Toast: "Time off added for *doctor* on *date*".
 - Footnote: "Time off stops new bookings in those hours; anyone already booked that day stays booked — check the calendar."
8. Adding and removing need `schedule.manage` (Clinic admin, Hospital admin, Facility manager). A doctor without an admin role cannot open this page.

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PROVIDEROS

TodayReception4CalendarBillingFulfillmentAnalyticsSettingsDA

Aarogya Family Clinic

SETTINGS

BranchesDepartmentsPractitionersWeekly availabilityVerification documentsNotification deliverySecurityCovering access

SETTINGS

Weekly availability

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

DOCTOR

Dr. Meera Iyer

DR. MEERA IYER - THIS WEEK

Mon		10:00 AM–6:00 PM · 20 min
Tue		10:00 AM–6:00 PM · 20 min
Wed		10:00 AM–6:00 PM · 20 min
Thu		10:00 AM–6:00 PM · 20 min
Fri		10:00 AM–6:00 PM · 20 min
Sat		10:00 AM–6:00 PM · 20 min
Sun		Not available

ADD HOURS

DAY

Monday

APPOINTMENT LENGTH

15 minutes

FROM

09:00 AM

UNTIL

05:00 PM

Add hours for Dr. Meera Iyer

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ProviderOS (desktop, earlier capture taken before the drag-to-add grid and Time off) — Weekly availability at a single-branch clinic: only a Doctor picker (no Branch), a list-style week view for Dr. Meera Iyer (Mon–Sat "10:00 AM–6:00 PM · 20 min", Sun "Not available") and the Add hours form.

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PROVIDEROS

Today

Reception 3

Calendar

Billing

Fulfillment

Analytics

Settings

DA

Sunrise Multispecialty Hospital

BRANCHAll branches

SETTINGS

Branches

Departments

Practitioners

Weekly availability

Verification documents

Notification delivery

Security

Covering access

SETTINGS

Weekly availability

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

BRANCH

DOCTOR

Sunrise Hospital — Indiranagar

Dr. Arjun Reddy

DR. ARJUN REDDY — THIS WEEK

Mon		9:00 AM–1:00 PM · 30 min
Tue		9:00 AM–1:00 PM · 30 min
Wed		9:00 AM–1:00 PM · 30 min
Thu		9:00 AM–1:00 PM · 30 min
Fri		9:00 AM–1:00 PM · 30 min
Sat		Not available
Sun		Not available

ADD HOURS

DAY

APPOINTMENT LENGTH

Monday

15 minutes

FROM

UNTIL

09:00 AM

05:00 PM

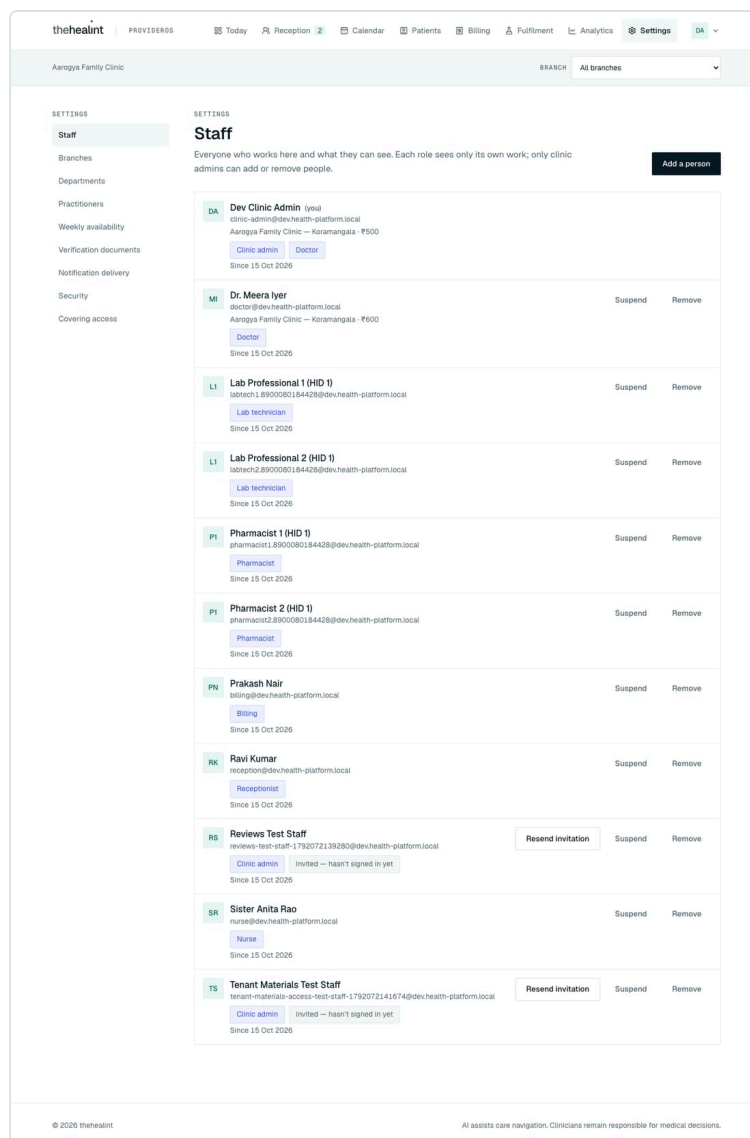
Add hours for Dr. Arjun Reddy

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ProviderOS (desktop, earlier capture) — Weekly availability at a hospital with several branches: Branch and Doctor pickers side by side, and a week view for Dr. Arjun Reddy (Mon–Fri "9:00 AM–1:00 PM · 30 min", weekend "Not available"). The Branch selector also appears in the top bar.

8. Staff (/settings/staff)



ProviderOS (desktop) — Settings → Staff for a clinic admin: **Staff** first in the Settings menu, the lead "Everyone who works here and what they can see. Each role sees only its own work; only clinic admins can add or remove people.", **Add a person**, and one row per person with initials, name, email, role pills, "Since 15 Oct 2026", and **Suspend / Remove**. Doctors show their branch and fee ("Aarogya Family Clinic — Koramangala · ₹600"). Two people who haven't signed in yet carry "Invited — hasn't signed in yet" and a **Resend invitation** button. The admin's own row ("(you)") has no buttons.

Only **Clinic admins** and **Hospital admins** manage staff. The `staff.manage` permission was taken away from Facility manager, Pharmacy admin and Lab admin (`supabase/migrations/20261104000002_staff_management.sql`), so the API (`apps/api/src/modules/staff`) refuses them, and ProviderOS hides the page from them.

1. **Settings** → **Staff** → `GET /api/v1/staff`. Each row shows:

- name ("(you)" on the admin's own row), email (or "No email"), and for doctors each branch as "*branch* · ₹*fee*", with "(off schedule)" when that affiliation is inactive;
- a pill per role held here, with " · suspended" on a suspended role;

- "Invited — hasn't signed in yet" until the person has set a password;
- "Since *date*".
- Empty: "No staff yet — Add your doctors and front desk to get started." Loading: "Loading your staff..."

2. **Add a person** opens a form: **Full name**, **Email** ("They'll get a link here to set their password.") and **Role**. The hint under Role says what that role sees:

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

Hospital admin is accepted by the API but not offered in this list.

thehealint PROVIDEROS Today Reception Calendar Patients Billing Fulfillment Analytics Settings

Aaranga Family Clinic BRANCH All branches

SETTINGS

Staff

Everyone who works here and what they can see. Each role sees only its own work; only clinic admins can add or remove people.

ADD A PERSON

FULL NAME EMAIL

ROLE Their own queue, calendar, patients and consultations. **Doctor**

REGISTRATION NUMBER COUNCIL e.g. Karnataka Medical Council

SPECIALTY **Not set** BRANCH **Choose a branch**

CONSULTATION FEE (₹) Set their weekly hours in Weekly availability once they are added.

Add and send invitation **Cancel**

ID	Name	Role	Email	Status	Actions
DA	Dev Clinic Admin	clinic-admin@dev-health-platform.local	Aaranga Family Clinic - Koranangala - ₹500	Active	Cancel Suspend
DR	Dr. Meera Iyer	doctor@dev-health-platform.local	Aaranga Family Clinic - Koranangala - ₹600	Suspended	Suspend Remove
L1	Lab Professional 1 (HID 1)	labtech1@dev-health-platform.local		Suspended	Suspend Remove
L2	Lab Professional 2 (HID 1)	labtech2@dev-health-platform.local		Suspended	Suspend Remove
P1	Pharmacist 1 (HID 1)	pharmacist1@dev-health-platform.local		Suspended	Suspend Remove
P2	Pharmacist 2 (HID 1)	pharmacist2@dev-health-platform.local		Suspended	Suspend Remove
PR	Prakash Nair	receptionist@dev-health-platform.local		Suspended	Suspend Remove
PR	Ravi Kumar	receptionist@dev-health-platform.local		Suspended	Suspend Remove
RS	Reviews Test Staff	review-test-staff-17927213929@dev-health-platform.local		Suspended	Resend invitation Suspend Remove
SR	Sister Anita Rao	nurse@dev-health-platform.local		Suspended	Suspend Remove
TS	Tenant Materials Test Staff	tenant-materials-access-test-staff-179272141674@dev-health-platform.local		Suspended	Resend invitation Suspend Remove

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All patient care navigation. Clinicians remain responsible for medical decisions.

*ProviderOS (desktop) — the Add a person form with Role set to Doctor: Full name, Email, Role (hint "Their own queue, calendar, patients and consultations."), Registration number ("Medical council registration."), Council ("e.g. Karnataka Medical Council"), Specialty ("Not set"), Branch ("Choose a branch"), Consultation fee (₹), the note "Set their weekly hours in Weekly availability once they are added.", a disabled **Add and send invitation** and **Cancel**.*

3. **A doctor needs more.** With Role = Doctor the form adds **Registration number**, **Council**, **Specialty** (optional), **Branch** and **Consultation fee (₹)**. The API refuses a doctor without them ("A doctor needs a registration number, council, branch and fee.").

4. **Add and send invitation** ("Adding...") → `POST /api/v1/staff`. In one transaction the system:

- creates the sign-in account if the email is new, or reuses an existing one (for example a patient account), plus a profile if there is none. The set-password link is an invite link for a new account and a password-reset link for an existing one;
- gives the person the role at this organization (an existing suspended or removed role is reactivated; "This person already has that role here." if it is already active);
- for a doctor, creates the practitioner record and affiliates it with the chosen branch at that fee (the branch must belong to this organization);

- queues the `staff.invited` email: "You've been added to *Organization* on thehealint" — "*Organization* has added you as *role*. Set your password to sign in to ProviderOS: *link*".
 - Toast: "*Name* added — we've emailed them a link to set their password". The new doctor still has no hours until they are set under Weekly availability.
5. **The invited person** opens the link, which lands on ProviderOS `/set-password` ("Opening your invitation...") → **Set your password** (their email under the heading) → **New password** ("At least 8 characters.") and **Confirm password** ("The two passwords don't match.") → **Save and continue**. This saves the password, marks the account as activated (the "Invited" pill disappears) and opens their first screen. An expired or used link shows "This link has expired — Invitation links work once and expire. Ask your clinic admin to resend it from Settings → Staff, or sign in if you have already set a password." with **Sign in**.
 6. **Resend invitation** (only while "Invited") → `POST /api/v1/staff/:profileId/resend-invite` emails a fresh link. Toast: "New sign-in link sent to *email*".
 7. **Suspend / Reactivate** → `PATCH /api/v1/staff/:profileId/membership`. One button per role ("Suspend *role*" when the person holds several). Each asks first:
 - "Suspend *name*?" — "They can't use ProviderOS for this organization until you reactivate them." → **Suspend**.
 - "Reactivate *name*?" — "They can sign in and work as *role* again." → **Reactivate**.
 8. **Remove** (removes the person's first-listed role here) → "Remove *name*?" — "They lose access to this organization. Their past work stays on record." → **Remove**.
 - For a doctor (suspend or remove), the dialog instead says "They stop being bookable here immediately. Appointments already booked stay on the calendar for you to move or cancel." The system deactivates every branch affiliation they have here.
 - The last active Clinic or Hospital admin cannot be suspended or removed: "This is the only admin. Add another clinic admin before removing this one."
 9. Every add, resend and status change is audited (`RECORD_EDITED` , `tenant_member`).

9. Notification delivery

1. **Settings** → **Notification delivery** → "Every reminder and confirmation this organization sends, and what happened to it. Dead-lettered means it will not be retried." → `GET /api/v1/notifications/tenant/summary` and `.../tenant/failed`.
2. Tiles: **Pending, Sent, Failed, Dead-lettered**.
3. **Failures** table: **Channel, Template, Status** (pill: Failed or Dead letter), **Attempts, Last error, Updated**.
 - Empty: "Nothing has failed. Every notification has sent, or is still pending its first attempt."
4. This page is **read-only monitoring**. There is no retry button, no per-event on/off switch, and no template or channel setting.
5. Templates that exist (all email): appointment confirmed, cancelled and rescheduled; payment captured, pay-at-facility confirmed, collected at facility and refunded; prescription ready; follow-up reminder; encounter covered.

10. Security and two-factor (MFA)

1. **Settings** → **Security** (also linked from the account menu) → "Require a code from an authenticator app..." → the system lists the account's authenticator factors.
2. With none: "Two-factor authentication is off. Anyone with your email can sign in to this organization's patient data..." → **Set up two-factor authentication**.
3. A QR code and a manual key appear → enter **Code from the app** → **Confirm** ("Verifying...") → "Two-factor authentication is now active on this account." **Cancel** discards the half-made factor.
4. Each enrolled authenticator shows "Added *date*" and a **Remove** button. Remove opens a confirm dialog that warns when it is the last one ("...removing it turns two-factor authentication off entirely...") → **Remove authenticator**.
5. **Enforcement**. On every later ProviderOS web sign-in, an enrolled account must enter the 6-digit code before anything loads. MFA is optional to enrol, but once enrolled it is always enforced on ProviderOS web. It is **not** enforced by ProviderOS mobile (see Gaps).

11. Covering-access review (`/settings/covering-access`)

1. **Settings** → **Covering access** → "Every time a colleague opened another practitioner's patient — who covered, for whom, and the reason they gave."
2. **From / To** dates (both default to today) → `GET /api/v1/encounters/covering-access?fromDate=...&toDate=...`.
3. Table: **Date, Patient, Assigned to, Covered by, Reason**.
 - Empty: "No covering access in this window..."
 - Only Clinic and Hospital admins see this page in the menu. A Facility manager (or anyone else) who opens the address gets "Not part of your role".
4. **Notification**: when the cover happens, the doctor who was originally assigned gets an email ("Covering doctor covered your patient *patient!*", with the reason). The admin gets nothing. The review is pull-only.

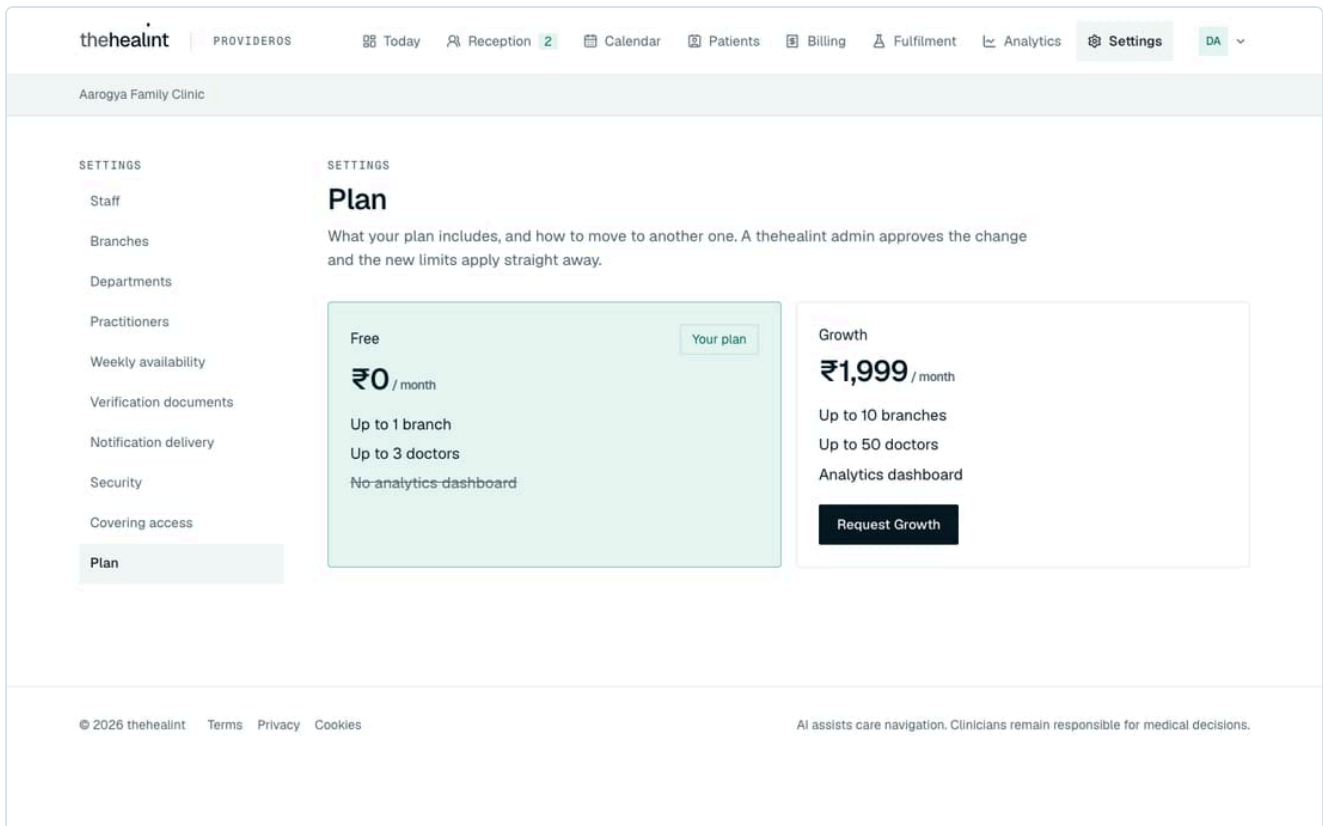
12. Analytics and the subscription plan

1. **Analytics** → "Checking your plan..." → `GET /api/v1/tenants/:id/subscription`.
2. **Not on Growth** (the Free plan has `provider_roi_dashboard = false`): "The ROI dashboard isn't on your current plan (*plan*). Upgrade to Growth to unlock source attribution, no-show tracking, and collections at a glance." A **See plans** button opens Settings → Plan (below). The branch limit message ("Your plan allows up to 1 branch(es) — upgrade to add more.") offers the same **See plans**.

Settings → Plan (Release 1.3)

1. **Settings** → **Plan** (clinic/hospital admins) → the catalogue with what each plan includes (`GET /api/v1/plans/compare`), the current plan marked **Your plan**, and **Request plan** on the others.

2. **Request** → optional note → **Send request** → POST `/api/v1/tenants/:id/plan-requests` (`tenant.manage`). One open request per organization (409 otherwise); asking for the current plan is 400. Every ACTIVE platform admin is emailed (`plan.change_requested`).
3. The page shows **Waiting for a decision**; after a decision, every clinic/hospital admin is emailed (`plan.change_decided`). Approval assigns the plan in the same transaction, so new limits apply at once; a decline shows its note on this page.



*ProviderOS (desktop) — Settings → Plan: Free (your plan) and Growth with their limits, and **Request Growth**.* 3. **On Growth** → **From / To** (defaults to the last 30 days) → GET `/api/v1/analytics/provider?...` → tiles **Appointments**, **New vs returning**, **No-show rate**, **Avg. wait**, **Collected**, followed by **By doctor**, **By branch** and **By department** tables. **Refresh** reloads.

- The department table explains when no doctors are placed in departments.
4. A plan lookup failure shows an error with retry, never the upgrade pitch.
 5. Apart from this gate there is **no subscription or billing-plan page** in ProviderOS.

13. Fulfilment: pharmacy and diagnostics (owner view)

A screenshot of the Pharmacy page is in [05-pharmacy-lab.md](#), Journey 2.

Fulfilment has two pages, **Pharmacy** (`/fulfillment/pharmacy`) and **Diagnostics** (`/fulfillment/diagnostics`). At owner level:

1. **Register pharmacy / Register lab** (owners only; a pharmacist or lab technician doesn't see this card) → facility details, optional **Branch**, **Licence expiry**, and "Offers home delivery" / "Offers home collection" → `POST /api/v1/fulfillment/facilities`. The facility starts as **Draft**.
2. **Licence document** → choose the facility and **Document type** (pharmacy: Drug licence, HFR proof, Pharmacist registration, Other; lab: Clinical establishment registration, NABL certificate, HFR proof, Lab professional registration, Other), number, issuing authority, dates and file → **Upload securely**.
3. **Registered facilities** → status pill (**Draft**, **Awaiting review**, **Verified**, **Rejected**, **Suspended**) → **Documents** lists the uploads → **Submit for review** (on Draft or Rejected). A platform admin verifies it.
4. **Registered pharmacist / Laboratory signatory / technician** → credential details plus **Registration evidence** chosen from the uploaded documents.
5. **Assigned orders** (patient-consented orders sent to your verified facilities): **Accept / Decline** on Requested. Pharmacy: **Mark ready** (becomes Ready for pickup, or Out for delivery for home delivery), then **Complete**. Lab: **Sample collected**, then upload a **Signed report** → **Release report**.
6. **Orders sent to external partners** (shown to admins, facility managers and pharmacy/lab admins, not to pharmacists or lab technicians) lists this organization's orders that went outside it, with **Open delivered report**.
7. The full fulfillment workflow is documented in [05-pharmacy-lab.md](#). Pharmacists and lab technicians now work these orders in ProviderOS themselves. ProviderOS mobile's **Pharmacy & labs** tab offers the same order buttons.

14. Multi-branch switching

1. When the organization has **more than one branch**, a **Branch** selector ("All branches" plus each branch) appears in the top bar of every page, next to the organization name. With one branch it is hidden.
2. The choice persists across page navigation (it lives in the app shell) but is **not saved** across a page reload.
3. **Follows the selector**: Reception (expected list, queue), the walk-in form, Calendar, the Reception waiting badge, and the default branch on Weekly availability.
4. **Ignores the selector**: Today, Billing and Analytics are always organization-wide. Departments and Practitioners have their own branch dropdowns.
5. If the selected branch disappears (deleted, membership changed), the selector falls back to "All branches".
6. **Switching organizations is not supported**. ProviderOS uses the first admin membership it finds. An account that administers two organizations cannot pick between them.
7. ProviderOS mobile's Calendar tab has its own "All branches" dropdown. Its Overview uses the account's *first* membership, whichever it is.

15. ProviderOS mobile (admin companion)

1. Sign in with email and password. The sign-in gate admits admin roles only (Clinic admin, Hospital admin, Facility manager, Pharmacy admin, Lab admin); other accounts are told to use the User app.
2. With no organization: "No organization yet. Set up your organization on ProviderOS web..."
3. Tabs, by role (`apps/provider-mobile/lib/screens/home_screen.dart`):
 - **Overview** (name, legal name, type, slug, verification status in capitals) and **Branches** (read-only list; "No branches yet — add one on ProviderOS web.") for Clinic admin, Hospital admin and Facility manager.
 - **Calendar** (date and branch filter; "No appointments on this date.") for those roles and for Receptionist and Appointment manager.
 - **Pharmacy & labs** (assigned orders with Accept, Decline, Mark ready, Complete, Sample collected, Release report) for those roles and for Pharmacist, Lab technician, Pharmacy admin and Lab admin.
 - A role with no tab (Nurse, Billing) sees "Your work is on ProviderOS web — open it on the clinic computer or in your browser."
 - Every staff role can sign in to this standalone app as well as reach the same home screen through the User app's staff workspace (see [03-front-desk.md](#), section 1c). Nurse and Billing see a pointer to ProviderOS web.
4. No publishing, staff, settings, reception, billing or analytics on mobile.

Role x capability

From `role_permissions` in `supabase/migrations`. "UI" says whether a ProviderOS screen exposes it.

Capability	Permission	Clinic admin	Hospital admin	Facility manager	UI
Open ProviderOS web (every screen)	<code>lib/access.ts</code>	Yes	Yes	Yes, except Staff and Covering access	Yes
Open ProviderOS mobile	admin role	Yes	Yes	Yes	Yes
Create an organization (becomes founder)	any signed-in user	Yes	Yes	Yes	Yes
Upload verification documents, publish/unpublish, add/edit branches, add departments	<code>tenant.manage</code>	Yes	Yes	No	Yes (edit branch: API only)

Capability	Permission	Clinic admin	Hospital admin	Facility manager	UI
Create practitioner profile, affiliate, set department, toggle active	practitioner.manage	Yes	Yes	No	Partly (self only; no active toggle)
Add / remove weekly hours and time off	schedule.manage	Yes	Yes	Yes	Yes
Add people, resend invitations, suspend / reactivate / remove roles	staff.manage	Yes	Yes	No (revoked in 20261104000002)	Yes (Settings → Staff)
Reception queue, walk-ins, Today tiles	queue.manage	Yes	Yes	Yes	Yes
Register patients and dependents	patient.register	Yes	Yes	Yes	Yes
Billing: invoices, collect, discount, refund	billing.manage	Yes	Yes	Yes	Yes (no refund button)
Notification delivery	notification.read	Yes	Yes	Yes	Yes
Analytics (also needs Growth plan)	analytics.read	Yes	Yes	Yes	Yes
Covering-access review	encounter.audit	Yes	Yes	No	Yes
Audit log	audit.read	Granted	Granted	No	No screen
Pharmacy / diagnostics fulfilment	fulfillment.manage	Yes	Yes	Yes	Yes
Read pre-visit notes, run consultations	encounter.manage , treating doctor only	No (Doctor only)	No	No	Only if also the appointment's Doctor
Change subscription plan	subscription.manage	No (platform admin)	No	No	No
Security / own MFA	any account	Yes	Yes	Yes	Yes

A Facility manager can open Settings → Branches, Departments, Practitioners and Verification documents, but the save buttons fail with a permission error (`tenant.manage` / `practitioner.manage` missing). The screens don't hide them.

Permissions & privacy

- **Owner, not clinician.** Admin roles do not hold `encounter.manage`. They cannot read pre-visit clinical notes in the appointment drawer or open a consultation. Even an admin who is also a doctor reads pre-visit notes and past visit notes only for appointments they treat (or covered with a reason).
- **Staff management is admin-only.** Only Clinic and Hospital admins hold `staff.manage`. The last active admin can't be removed or suspended. A suspended or removed doctor stops being bookable at once.
- **Covering-access review** is the compliance loop ("reason, alert and review"): a colleague gives a reason, the assigned doctor is emailed, and admins can review the log. A Facility manager is excluded.
- **Verification documents** are only reachable through 5-minute signed links, by the organization's own staff or a platform reviewer.
- **Organization isolation** is enforced in the API and by row-level security. Every list is limited to the caller's organization.
- **Publishing** is blocked by a database constraint until the organization is Verified. The disabled button is not the only guard.
- **MFA** is enforced on ProviderOS web for enrolled accounts. Admins hold `patient.demographics.read`, so turning MFA on is recommended. It is not mandatory.

Gaps & known limitations

1. ~~No staff or role management~~ — fixed: Settings → Staff adds, invites, suspends, reactivates and removes people (Clinic and Hospital admins only).
2. ~~Can't add other doctors~~ — fixed through Settings → Staff (role Doctor), which also creates the practitioner record and first branch affiliation. Settings → Practitioners itself still only handles the signed-in admin's own profile, and a doctor's further branches, department and active toggle for other doctors are partly API-only.
3. **Practitioners page forgets on reload.** The profile and affiliation cards are not loaded from the server, so after a refresh **Create my practitioner profile** shows again. Raw ids ("Practitioner id", "Affiliation *id* · branch *id*") are shown instead of names.
4. **Individual-doctor founders don't get the Doctor role.** Onboarding grants only Clinic admin. Creating a practitioner profile does not add the Doctor role. Settings → Staff accepts an email that already has an account, so a founder could in principle add their own email with role Doctor, but nothing suggests it and it has not been checked end to end.
5. **Status Submitted before any document exists.** A new organization's verification status starts as Submitted at creation.
6. **Verification history shows raw codes** ("SUBMITTED → VERIFIED") instead of sentence case. The mobile Overview shows status and type in capitals.
7. ~~No email when a verification decision is made~~ — fixed: active Clinic and Hospital admins are emailed on approval and rejection. There is still no email when an organization is published.

8. **No edit or delete UI for branches, departments or verification documents.** Branch edit exists in the API (`PATCH /branches/:id`), as does a practitioner active/inactive toggle. Weekly hours can now be removed (not edited in place) and time off added and removed.
9. ~~No schedule exceptions UI~~ — fixed: the **Time off** section on Weekly availability.
10. **Notification settings are monitoring only.** There is no retry of failed or dead-lettered messages, no preferences, no SMS/WhatsApp (all templates are email).
11. ~~No subscription page~~ — fixed: Settings → Plan, with requests decided by a platform admin. Plans still can't be paid for in the app.
12. **No audit-log screen in ProviderOS**, although admins hold `audit.read`. (Platform admins now have one; see [06-platform-admin.md](#), Journey 13.)
13. **Facility manager is half-supported.** It can now be given through Settings → Staff, but it still sees Settings pages whose saves fail (no `tenant.manage` / `practitioner.manage`).
14. **Staff page details. Remove** takes away every role the person holds here; **Suspend** works per role. Adding an email that already has an account keeps that account's existing name; the Full name typed is only used in the invitation email.
15. **No organization switcher.** An account administering several organizations always gets the first one. Mobile uses the first membership of any kind.
16. **Branch scope is partial.** Today, Billing and Analytics ignore it, and the selection resets on reload.
17. **MFA gaps.** ProviderOS mobile never runs the authenticator challenge (its own code says so), so an enrolled admin signs in on mobile with password only.
18. **Two iPhone entry points for one home screen.** The role-based home screen is reached by admins through ProviderOS mobile and by front-desk, pharmacist and lab-technician accounts through the User app; ProviderOS mobile still turns the latter away with "use the thehealint User app".
19. **Onboarding is one step.** "Step 1 of onboarding" has no step 2. No checklist guides the admin through documents, branch, staff, hours and publish.
20. **No screenshots** exist for onboarding, branches, departments, documents, notifications, security, covering access, analytics or the set-password page in `screenshots/ux-audit/after/` (see the "Screenshot coverage" list in [README.md](#)).

Related

- [01-patient.md](#): what patients see once the organization is published
- [02-doctor.md](#): consultations, covering a colleague, and the doctor's schedule
- [03-front-desk.md](#): Reception, Calendar, Patients and Billing in detail
- [05-pharmacy-lab.md](#): the full fulfilment workflow
- [06-platform-admin.md](#): verification review, facility verification and plan assignment

Bulk imports (added Oct 2026)

Four imports share one shape (CSV → preview with per-line reasons, no change → confirm with an Idempotency-Key and an `expectedReady` guard → per-line report), all up to 200 lines, all audited:

Import	Where	Endpoints	Notes
Staff	Settings → Staff → Add from a spreadsheet	<code>/staff/import/preview</code> , <code>/staff/import</code>	Roles limited to what the importer may add
Doctors' branches and fees	Settings → Staff → Doctors' branches and fees	<code>/practitioner-branches/import/preview</code> , <code>/import</code>	Places existing staff doctors at branches or changes a fee; <code>practitioner.manage</code>
Branches	Settings → Branches → Add from a spreadsheet	<code>/branches/import/preview</code> , <code>/import</code>	Needs latitude/longitude; stops at the plan's <code>max_branches</code> ; <code>tenant.manage</code>
Pharmacies and labs	Fulfilment → Add from a spreadsheet	<code>/fulfillment/facilities/import/preview</code> , <code>/import</code>	Registers drafts; skips a licence already registered; <code>fulfillment.manage</code>

Region (added Oct 2026)

An organization's `locale` , `currency` and `timeZone` are read-only here; a platform administrator changes them (Admin web → organization → Region). ProviderOS follows them through `LocaleProvider` .

Policies and error pages (added Oct 2026)

The footer carries Terms, Privacy and Cookies. Unknown addresses show a "We could not find that page" screen, a failed page shows "This page could not be shown" with a reference, and an offline banner appears when the connection drops.