StartERP
AI BUSINESS OS

MODULE GUIDE 11 OF 14

Hospitals, clinics, pharmacies and opticians

Patient records, dental charts, prakriti assessments, therapy courses, Ayurvedic batches, retreat guests, prescriptions and refills, insurance claims, drug tracking, prescription history, hospital beds, lab, theatres, nursing, discharge records and pre-authorisations. Step-by-step instructions for each of the 19 modules, with the real screens you will use.

- Patient records
- Dental chart
- Prakriti & dosha assessment
- Panchakarma & therapy schedule
- Ayurvedic batch manufacturing
- Wellness retreats & Form C
- Prescriptions & refills
- Insurance claims
- Drug tracking (SFDA RSD)
- Prescription history
- Eye tests & prescriptions
- Lens lab orders
- Contact lens reorders
- Wards & beds
- Lab & radiology
- OT scheduling
- Doctor orders & nursing
- Discharge & medical records
- Insurance pre-authorisation

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How to use this guide

Each chapter covers one module: what it does, how to start in a few steps, and then each of its screens with the steps to follow. The label under each module name says whether every store has it or whether it is an add-on module switched on for your store. Some modules are made for certain kinds of business or for one country, and the label says which.

Where to find what your store has. Open **Settings** → **Modules** to see the modules your store has. Every screen has a **?** button at the top with the steps for that screen, and the ⓘ beside a title explains what the screen shows.

About the screenshots. They come from StartERP demo stores (starterp.org/#/demo-store), each taken in the kind of business the module is made for, so the names and figures are sample data. Your screens show your own company, products and figures, and some words change to suit your business.

The modules in this guide

Module	What it gives you
Patient records Add-on	Keep each patient's file with allergies, long-term conditions and medicines, record every visit with vital signs and ICD-10 diagnoses, sign it so it can no longer change, and see who opened or changed each file; only clinical staff can open them

Dental chart Add-on	Chart each patient's teeth by FDI number with what you found on each tooth and surface, plan the treatments, mark them done as you go, and see who opened or changed each chart; only clinical staff can open them
Prakriti & dosha assessment Add-on	Assess each patient's constitution with a 20-question questionnaire scored into Vata, Pitta and Kapha, note the doshas out of balance, the eightfold examination, agni, koshta and bala and the diet and lifestyle advice; only clinical staff can open them
Panchakarma & therapy schedule Add-on	Plan each patient's Panchakarma or therapy course day by day from ready plans, with the phase, therapist and room of every session; a therapist or room is never booked twice, and the day board shows every room and therapist
Ayurvedic batch manufacturing Add-on	Keep a batch manufacturing record for every Kashayam, Arishtam, Thailam or Lehyam you make: ingredients, method, quality check and release; the expiry is filled in from the shelf life Rule 161B allows each form, and a board lists the batches about to expire
Wellness retreats & Form C Add-on	Book each retreat guest from enquiry to departure with the programme, flight, airport pickup, room and deposit; no room is given twice, and in India every foreign guest's Form C is tracked against its 24-hour deadline
Prescriptions & refills Add-on	Record each prescription with the doctor, the medicines and a photo of the paper, sell controlled medicines only on their prescription, count the refills left and remind the patient on WhatsApp when the next refill is due
Insurance claims Add-on	Bill a sale to the insurance company with the patient paying only the co-pay, claim the rest in monthly batches, and record what the insurer paid and rejected on each sale so the rejected part can be claimed again
Drug tracking (SFDA RSD) Add-on	Scan the 2D barcode of each medicine pack you receive, sell, return or take off the shelf, keep the notices SFDA's track and trace system (RSD) needs, export the pending ones as one file for the RSD portal and record SFDA's answer on each
Prescription history Add-on	Every patient's prescriptions from the lens orders, whether they changed since the last visit, and the next eye test with a WhatsApp reminder

Eye tests & prescriptions Add-on	Record each eye test the way the optometrist writes it: SPH, CYL, AXIS, ADD, prism and visual acuity for each eye, distance and near PD and the contact lens fitting; print the prescription card, see the prescriptions that expired or end within 30 days and remind each patient on WhatsApp
Lens lab orders Add-on	Send each pair of glasses to the lab with the lens type, index, coatings and frame; follow it from the lab to the counter, see the jobs past the lab's promised day and the glasses waiting to be collected, record remakes with their reason, and compare each lab's on-time and remake rates and the margin over its cost
Contact lens reorders Add-on	Give each contact lens product the days one box lasts; from every sale the app works out the day each customer runs out, lists those who ran out or run out within two weeks and reminds them on WhatsApp with the lens they bought last
Wards & beds Add-on	Every bed, room or cottage on one board by ward: free, occupied with the patient, IP number, doctor, bystander, diet and days in, being cleaned or out of service; admit, discharge and see the occupancy and who is due out
Lab & radiology Add-on	The lab tests and scans billed at the till become a worklist: sample taken, in the lab, reported and handed over, each with its time, the urgent ones first and the overdue flagged, with the average turnaround
OT scheduling Add-on	Each theatre's list for the day: book an operation with its time, surgeon, anaesthetist and patient, tick the safety checks before it starts and follow it to done; a theatre or surgeon booked twice is refused, with the theatre use and late starts
Doctor orders & nursing Add-on	A chart for each admitted patient: the doctor's orders with dose, route and frequency, the medicine round with each dose given, held or refused, vitals with the signs out of range flagged, intake and output and nursing notes, every entry signed and kept as written
Discharge & medical records Add-on	A discharge summary for each admission with the ICD-10 diagnoses, the course, the medicines and when to come back, signed by the doctor and kept as written, and the records room's worklist: each file received, checked, coded and lent out and back, with the files late

Insurance pre-authorisation Add-on	Each insured admission's approval from the insurer or TPA: the request with the member no., diagnosis and estimate, the insurer's queries, the approved amount and approval no., more asked for a longer stay, the final bill and the settlement, with the requests waiting over a day, what the patient pays above the approval and what the insurer disallowed

01

Patient records

Add-on module

For: Medical clinic & polyclinic, Acupuncture clinic, Dental clinic, Hospital & medical centre, Ayurveda hospital & Panchakarma centre, Ayurveda clinic, Ayurveda spa & wellness centre

Every patient's file and visits, open only to your doctors

Keep each patient's allergies, long-term conditions and medicines in one file and record every visit with the vital signs, the examination and ICD-10 diagnoses. A signed visit can no longer change, later results go in an addendum, only the roles you choose can open the records, and the access log shows who looked at or changed each file.

What you get

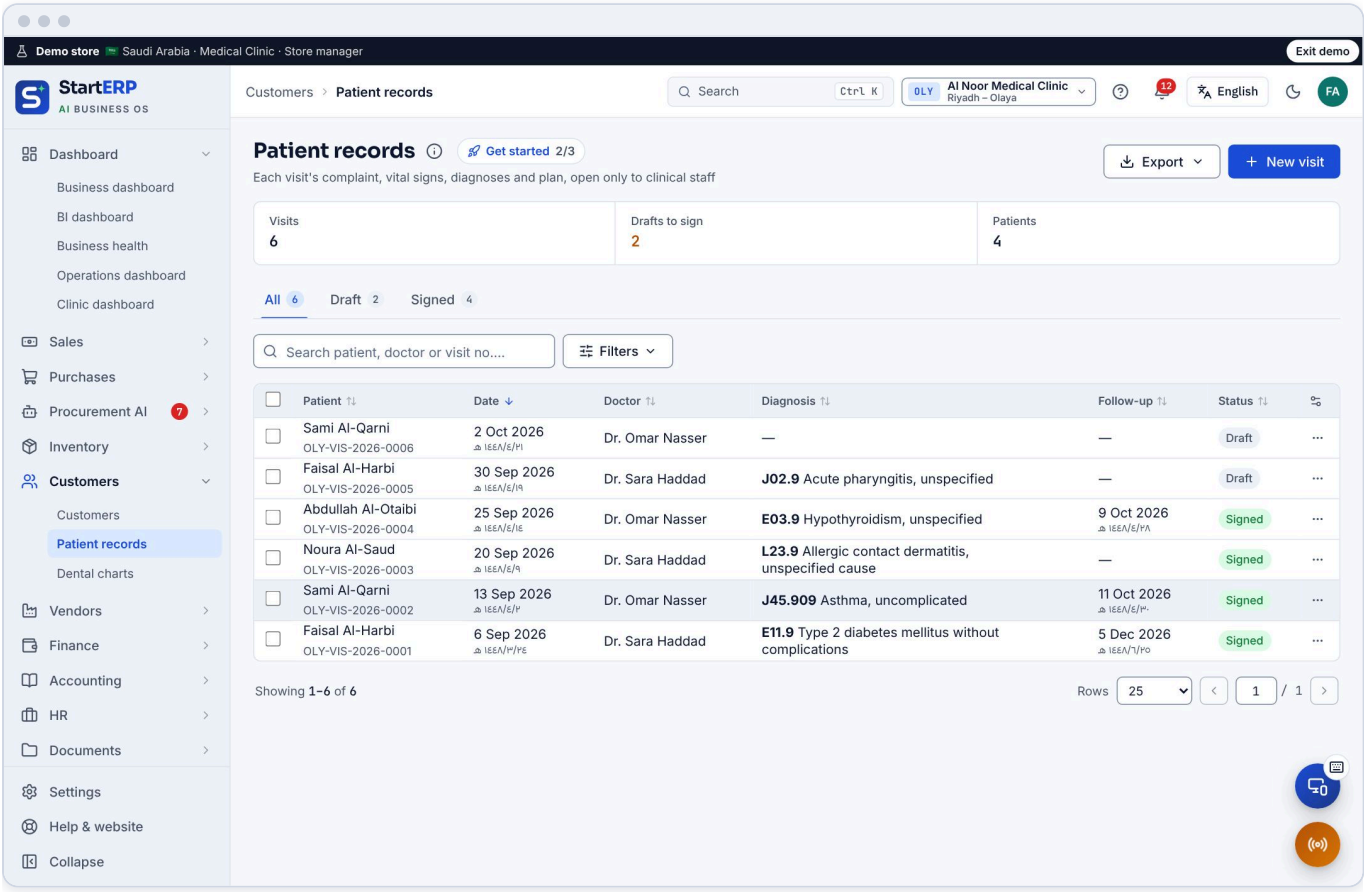
- Allergies and medicines on every file
- Vital signs and ICD-10 diagnoses
- Signed visits that never change
- Clinical staff only, with an access log

GET STARTED IN 3 STEPS

1. **Add the patient.** Allergies, conditions and medicines.
2. **Record a visit.** Vitals, examination and diagnoses.
3. **Choose who may open records.** Every access is logged.

Patient records

Each patient's file (blood group, allergies, long-term conditions and medicines) and every visit: the complaint, vital signs, examination, ICD-10 diagnoses, the plan and the follow-up date. A signed visit can no longer change; later findings go in an addendum. Only clinical staff can open them, and every look or change is in the patient's access log. Part of the Patient records add-on for medical and acupuncture clinics.



Patient records · demo store: Medical Clinic

1. Give the doctors and nurses a role with Can open patient records switched on (Users → RBAC). Admin has it; no other role does until you switch it on.
2. Open the patient under Customers and press Patient file. Fill in the blood group, allergies, long-term conditions and medicines and press Save file.
3. Press New visit (or Customers → Patient records → New visit). Type the complaint and vital signs, search the diagnosis by name or ICD-10 code, write the plan and the follow-up date and save. The visit stays a draft until you sign it.
4. Open the visit and press Sign visit when it is complete. A signed visit cannot be edited or deleted; when a result comes back, add it under Addenda.

Tips. Signing needs at least one diagnosis. The first diagnosis is the main one unless you tick another. The access log on the patient file lists who opened or changed the file and its visits, and when. It names the fields that changed, never what was written in them. Patient records are kept out of the AI assistant and the automations.

02

Dental chart

Add-on module

For: Dental clinic, Medical clinic & polyclinic, Hospital & medical centre

Every tooth, every treatment, on one chart

Chart each patient's teeth by FDI number with what you found on each tooth and surface, plan the treatments and mark them done as you go. A tooth with work still to do shows at a glance, only the roles you choose can open the charts, and the access log shows who looked at or changed each one.

What you get

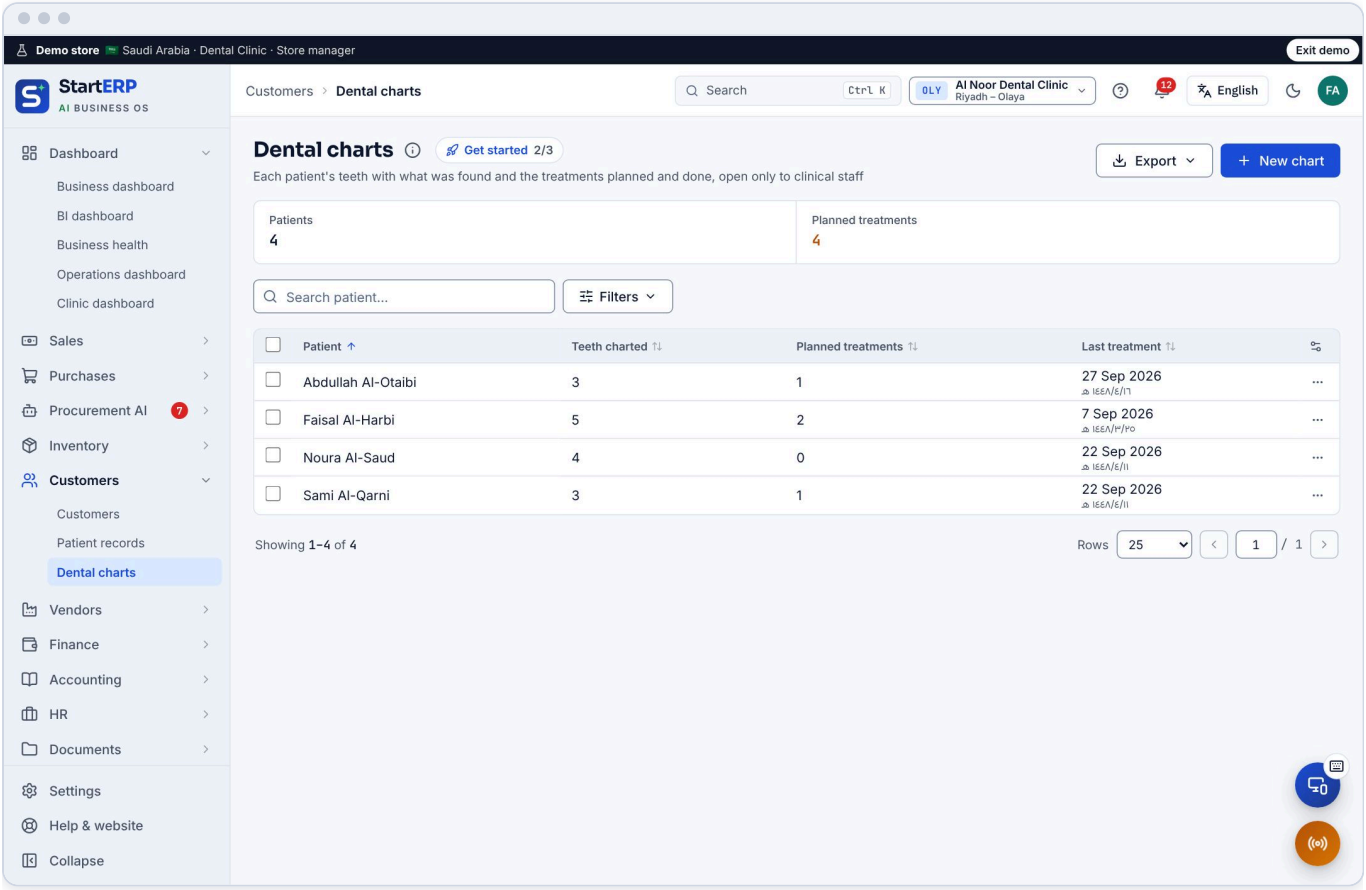
- Adult and child teeth by FDI number
- Conditions by tooth and surface
- Treatments planned and done
- Clinical staff only, with an access log

GET STARTED IN 3 STEPS

1. **Pick the patient.** Or add a new one.
2. **Chart the teeth.** Findings per tooth and surface.
3. **Plan and mark treatments.** Open work shows at a glance.

Dental chart

Each patient's teeth by FDI number (11 to 48 for adults, 51 to 85 for children) with what was found on each tooth and surface, and the treatments planned and done. Only clinical staff can open the charts, and every look or change is in the patient's access log. Part of the Dental chart add-on for dental and medical clinics.



Dental chart · demo store: Dental Clinic

1. Give the dentists and assistants a role with Can open patient records switched on (Users → RBAC).
2. Open the patient under Customers and press Dental chart (or Customers → Dental charts → New chart and pick the patient). Choose Adult, Child or Mixed under Teeth shown.
3. Tap a tooth, choose what you found (caries, filled, crown, missing and so on) and tick the surfaces: M mesial, O occlusal, D distal, B buccal, L lingual, I incisal.
4. Under Treatments add each treatment with its tooth, as Planned or Done, and press Done on a planned one when it is finished. Press Save chart.

Tips. A tooth with a planned treatment shows an orange dot, so you see what is still to do at a glance. Each patient has one chart. A done treatment needs its date and cannot be dated in the future. Dental charts are kept out of the AI assistant and the automations.

03

Prakriti & dosha assessment

Add-on module

For: Ayurveda hospital & Panchakarma centre, Ayurveda clinic, Ayurveda spa & wellness centre

Know each patient's constitution before you treat

The Vaidya answers 20 questions on the patient's nature and the screen scores Vata, Pitta and Kapha as they go, naming the prakriti: Vata-Pitta, Kapha or all three. Note the doshas out of balance now, the eightfold examination from pulse to build, agni, koshta and bala and the diet and lifestyle advice, so every visit and therapy starts from the same picture. Only the roles you choose can open them, and the access log shows who looked.

What you get

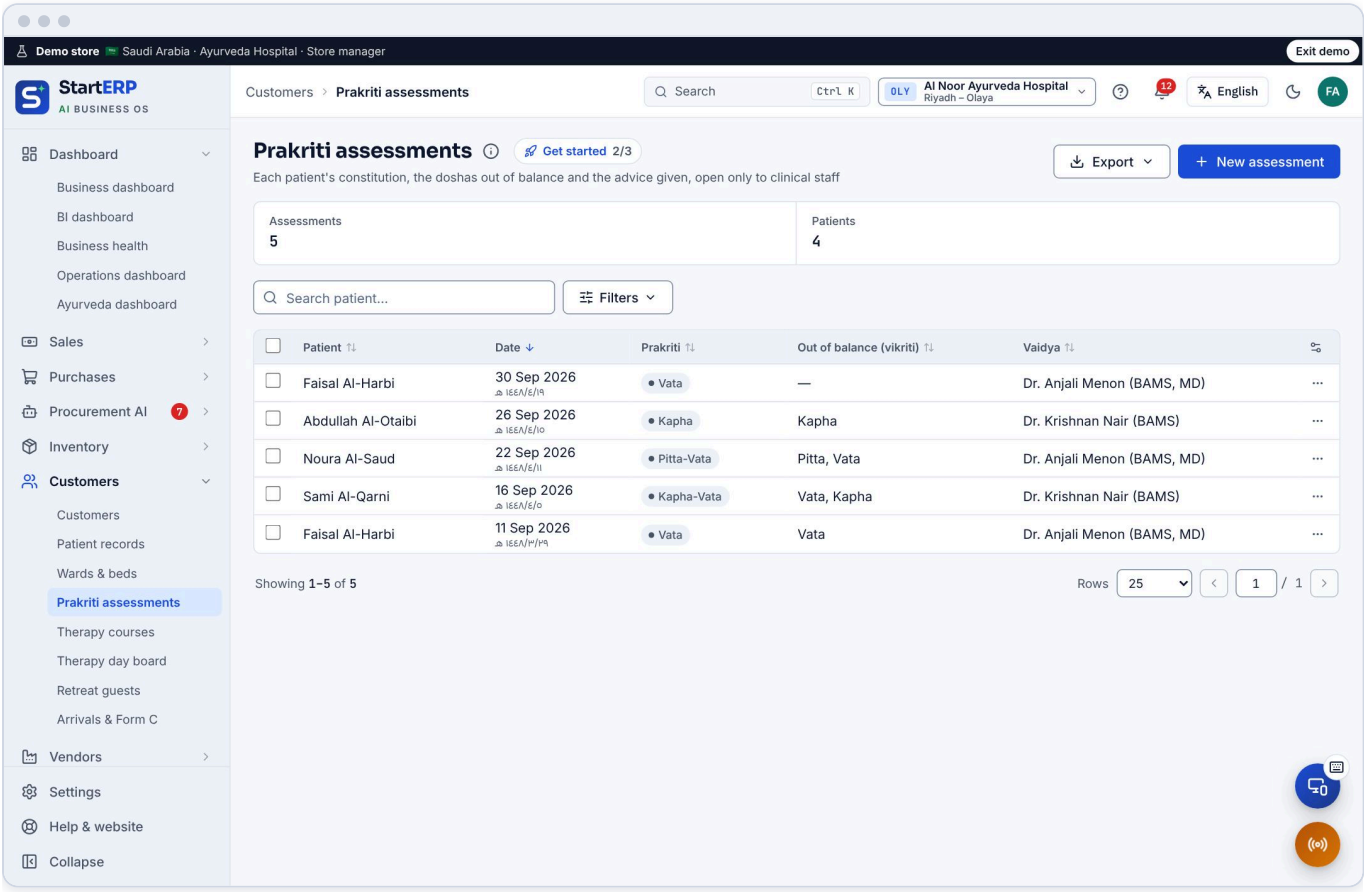
- Prakriti scored as you answer
- Vikriti and Ashtavidha pariksha
- Agni, koshta, bala and pathya
- Clinical staff only, with an access log

GET STARTED IN 3 STEPS

1. **Pick the patient.** Or add a new one.
2. **Answer the 20 questions.** Vata, Pitta and Kapha scored as you go.
3. **Note vikriti and advice.** Every look is logged.

Prakriti assessment

The Vaidya's assessment of a patient's constitution: a 20-question questionnaire scored into Vata, Pitta and Kapha shares and the prakriti it names, the doshas out of balance now (vikriti), the eightfold examination (Ashtavidha pariksha), agni, koshta and bala and the diet and lifestyle advice (pathya). Only clinical staff can open them, and every look or change is in the patient's access log. Part of the Prakriti & dosha assessment add-on for Ayurveda hospitals, clinics and spas.



Prakriti assessment · demo store: Ayurveda Hospital

1. Give the Vaidyas a role with Can open patient records switched on (Users → RBAC).
2. Go to Customers → Prakriti assessments → New assessment, pick the patient and the date and type the Vaidya.
3. Answer each question for the patient's nature since childhood. The bar shows Vata, Pitta and Kapha as you go and names the prakriti once 10 questions are answered.
4. Tick the doshas out of balance now, choose agni, koshta and bala, fill in the eightfold examination and the advice given, and press Save assessment.

Tips. A prakriti within 10 points across all three doshas is Tridosha; two within 15 points make a pair such as Vata-Pitta, the larger first. Assess again on a later visit to follow the vikriti; the list keeps every assessment, the latest first. Prakriti assessments are kept out of the AI assistant and the automations.

04

Panchakarma & therapy schedule

Add-on module

For: Ayurveda hospital & Panchakarma centre, Ayurveda clinic, Ayurveda spa & wellness centre

Every therapy room and therapist, booked once

Plan a patient's course in a minute from a ready plan, Virechana, Kati vasti, Shirodhara or a rejuvenation week, then change any day: the therapy, its phase from Purvakarma to Paschat karma, the time, the therapist and the room. The screen marks a therapist or a room already taken at that hour before you save, so no two patients wait for the same Droni. The day board lists every session by time with each room's and therapist's hours, and therapists tick each session done or missed.

What you get

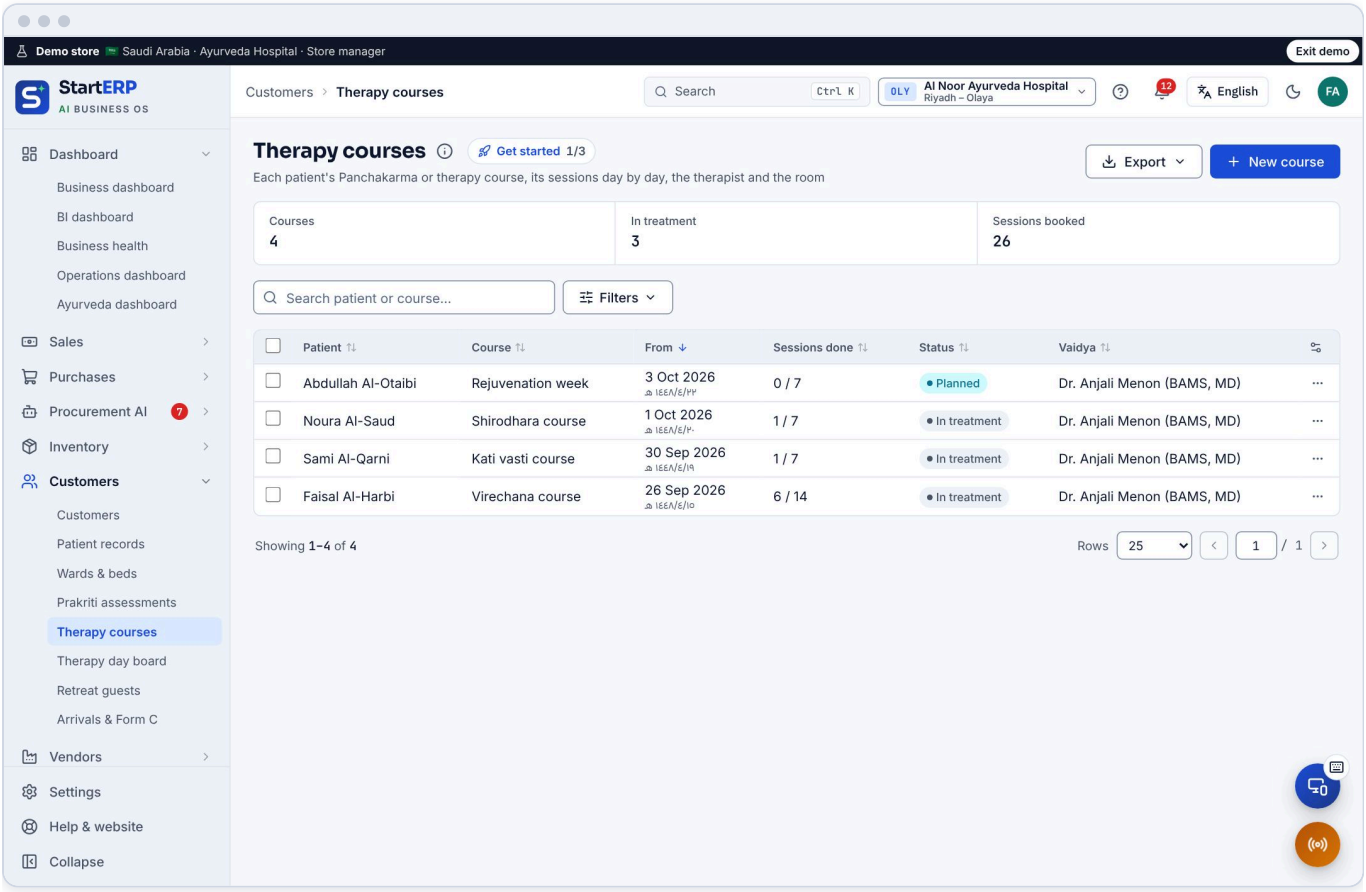
- Ready Panchakarma plans
- No double-booked therapist or room
- Purvakarma, Pradhana and Paschat karma
- Day board of rooms and therapists

GET STARTED IN 3 STEPS

1. **Start a course.** Pick the patient and a ready plan.
2. **Book therapist and room.** Clashes are marked before saving.
3. **Run the day board.** Tick sessions done or missed.

Therapy courses

Each patient's Panchakarma or therapy course with its sessions day by day: the therapy, the phase (Purvakarma, Pradhana karma or Paschat karma), the time and length, the therapist and the room, and whether it was done or missed. A therapist or a room is never booked twice at the same time, and the Therapy day board shows every session of a day with each room's and therapist's hours. Part of the Panchakarma & therapy schedule add-on for Ayurveda hospitals, clinics and spas.



Therapy courses · demo store: Ayurveda Hospital

1. Go to Customers → Therapy courses → New course and pick the patient.
2. Under Add from a ready plan, choose a plan such as the 14-day Virechana course, the first day, the time, the therapist and the room, and press Add the plan's sessions. Or press Add session to add days one by one.
3. Change any day's therapy, time, minutes, therapist or room. A therapist or a room already booked at that time is marked under the field with the patient who has it; change the time, therapist or room before you save.
4. Press Save course. Each day, open Customers → Therapy day board to see the sessions by time, and mark each session Done or Missed in its course.

Tips. A missed session frees its slot, and a cancelled course books nothing, so the therapist and the room can be given to another patient. Sessions back to back (one ends at 10:00, the next starts at 10:00) are not a clash. Keep clinical notes in the patient's records: courses hold the schedule only, so the AI assistant can read the day board and the courses for you.

05

Ayurvedic batch manufacturing

Add-on module

For: Ayurveda pharmacy, Ayurveda hospital & Panchakarma centre

Every batch you make, on record and in date

Open a batch manufacturing record for each Kashayam, Arishtam, Thailam, Lehyam or Gulika you make: the medicine, its dosage form, the batch number, the quantity made, every ingredient with its weight, the method followed and the quality check. The expiry is filled in from the shelf life Rule 161B of the Drugs and Cosmetics Rules allows that form, ten years for an Arishtam and two for a Choornam, and a later date is refused. A batch waits in quarantine until it is released, and the expiry board lists the released batches about to expire, so none is sold past its date.

What you get

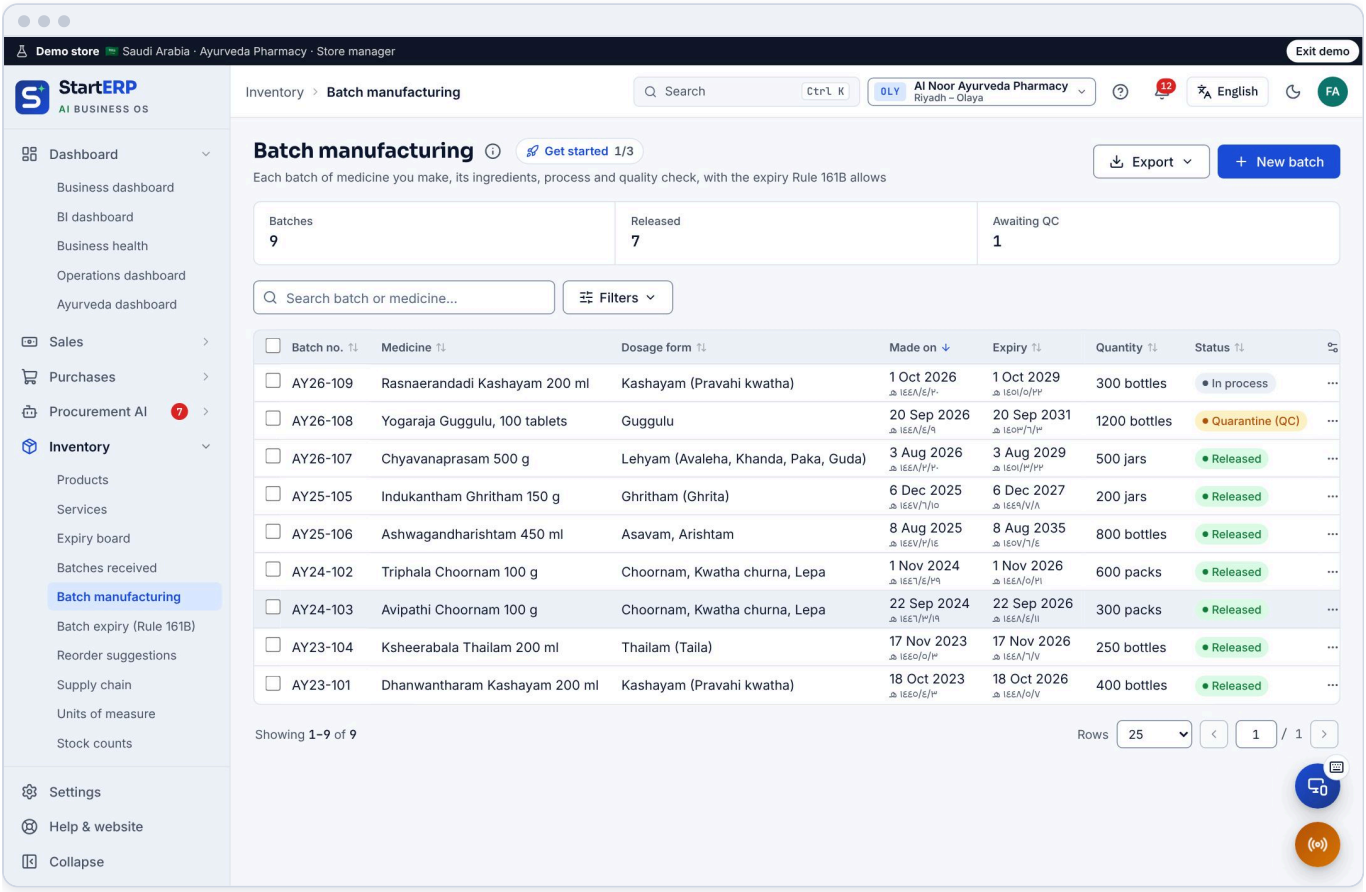
- Batch manufacturing record
- Rule 161B expiry by dosage form
- Quarantine, QC and release
- Expiry board

GET STARTED IN 3 STEPS

1. **Record a batch.** Pick the medicine and its form.
2. **Check and release.** The expiry follows Rule 161B.
3. **Watch the expiry board.** See batches about to expire.

Ayurvedic batch manufacturing

A batch manufacturing record for every Ayurvedic medicine you make: the medicine, its dosage form, the batch number, the quantity, the ingredients with their weights, the method, the quality check and the release. The expiry is filled in from the shelf life Rule 161B of the Drugs and Cosmetics Rules allows the form (10 years for Asavam and Arishtam, 3 for Kashayam, Thailam and Lehyam, 2 for Choornam and Ghritham), and a later expiry is refused. The Batch expiry board lists the released batches about to expire. Part of the Ayurvedic batch manufacturing add-on for Ayurveda pharmacies and hospitals.



Ayurvedic batch manufacturing · demo store: Ayurveda Pharmacy

1. Go to Products → Batch manufacturing → New batch, pick the medicine and choose its dosage form.
2. Type the batch number, the quantity made and the date of manufacture. The expiry is filled in with the latest date Rule 161B allows; you may set an earlier one.
3. Press Add ingredient for each herb or mineral with its weight, then write the method followed and the quality check.
4. Keep the batch in Quarantine (QC) until it passes, then set it to Released and press Save. Open Products → Batch expiry to see the released batches about to expire.

Tips. Pick the form with care: a Gulika of herbs only keeps 3 years, one with minerals or guggulu 5 and one of minerals only 10. Each batch number is used once in the store, in capitals. Ask the AI assistant which batches expire in the next 90 days.

06

Wellness retreats & Form C

Add-on module

For: Ayurveda spa & wellness centre, Ayurveda hospital & Panchakarma centre

Every retreat guest met, roomed and registered

Book each guest's retreat from the first enquiry: the programme, the nights, the flight and arrival time, the airport pickup, the room and the deposit. A room is never given to two guests on the same night. The arrivals board lists who lands in the next days, with flight and pickup, so the driver and the room are ready. In India the law asks for a Form C within 24 hours of a foreign guest's arrival: the board counts down each one and marks it late, until the application number is entered.

What you get

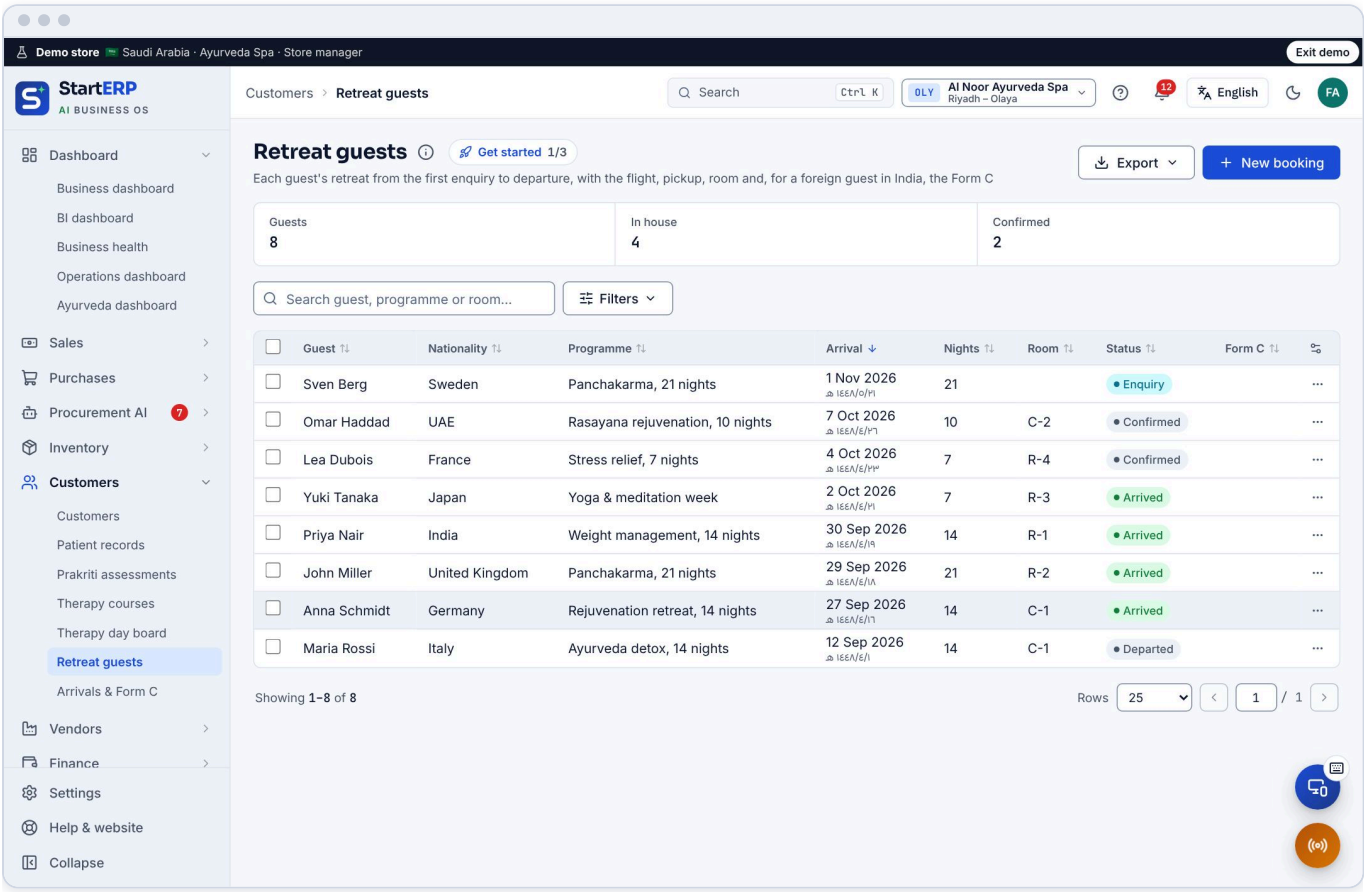
- Enquiry to departure
- Flight and airport pickup
- No room booked twice
- Form C within 24 hours

GET STARTED IN 3 STEPS

1. **Book a guest.** Programme, dates and flight.
2. **Mark the arrival.** Passport and visa for a foreign guest.
3. **File Form C in time.** Within 24 hours in India.

Retreat guests and Form C

One booking per retreat guest from the first enquiry to departure: the programme, arrival and departure, arrival time and flight, airport pickup, room and deposit, and for a foreign guest the passport and visa. A room is never given to two confirmed or arrived guests on the same night. In India a place that houses a foreigner files Form C with the Bureau of Immigration within 24 hours of arrival; the Arrivals & Form C board counts down each one. Part of the Wellness retreats add-on for Ayurveda spas and hospitals.



Retreat guests and Form C · demo store: Ayurveda Spa

1. Go to Customers → Retreat guests → New booking, type the guest's name, choose the nationality and write the programme.
2. Enter the arrival and departure days, the arrival time and flight, tick Airport pickup if a driver goes, give the room and the deposit, set the status to Confirmed and press Save booking.
3. When the guest arrives, set the status to Arrived and, for a foreign guest, type the passport number and choose the visa type. The arrival time is kept.
4. File Form C on the Bureau of Immigration's site, then type its application number on the booking and save. Open Customers → Arrivals & Form C to see who is still due, who is late and who arrives next.

Tips. Form C is asked only of places in India, for every guest who is not Indian; elsewhere the board shows the arrivals only. An enquiry holds no room, so give the room when the guest confirms. The AI assistant can list the arrivals and the Form C due, but it never sees passport or visa numbers.

07

Prescriptions & refills

Add-on module

For: Pharmacy, Hospital & medical centre, Ayurveda pharmacy

Controlled medicines only on a prescription

Record each prescription at the pharmacy till: the patient, the doctor, the medicines with their dose and quantity and a photo of the paper. A controlled medicine is sold only on its prescription and never beyond the quantity written, each sale is kept as a fill, and the refill reminder comes a few days before the patient runs out, ready to send on WhatsApp.

What you get

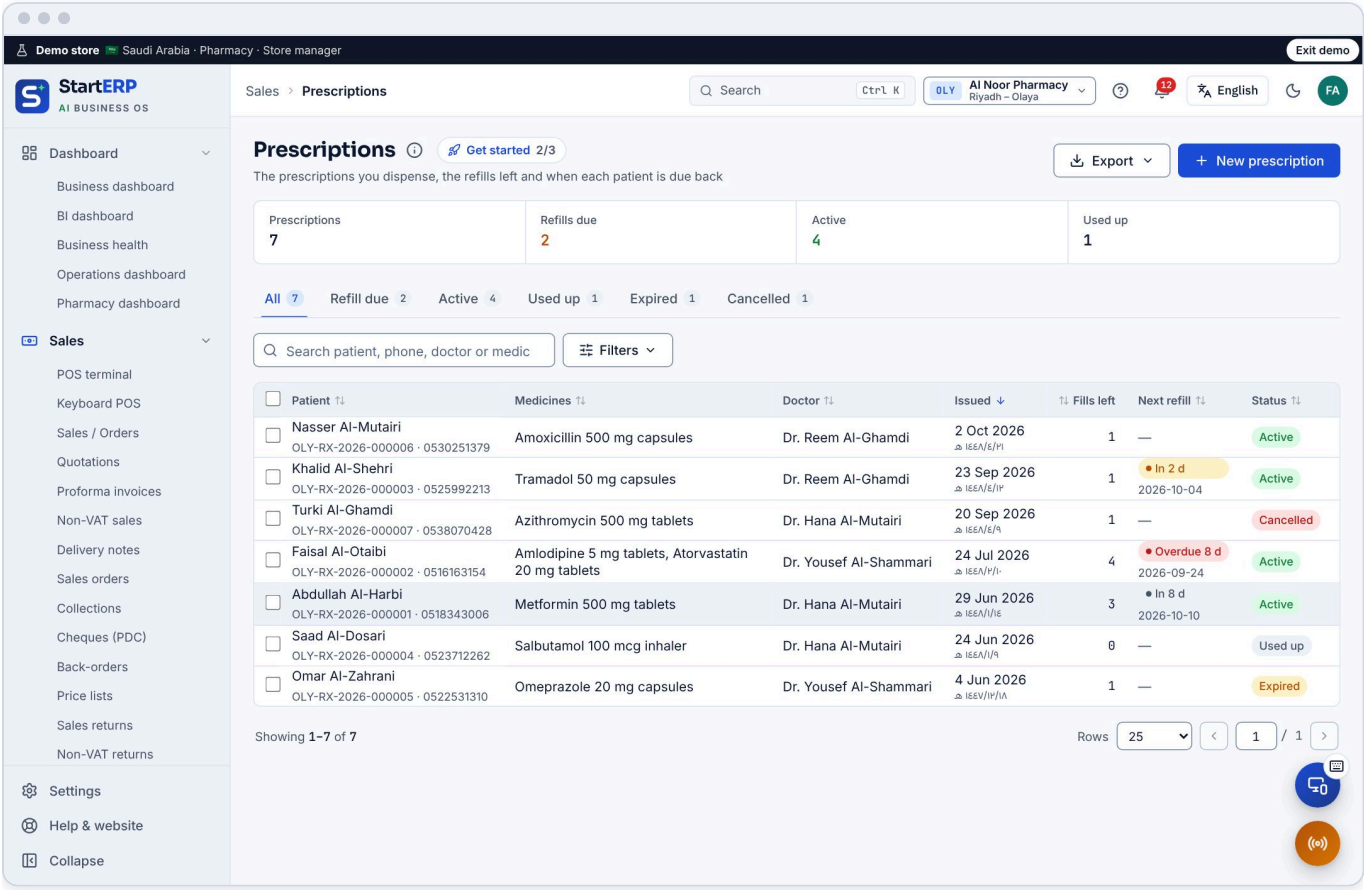
- Prescription checked before the sale
- Doctor, patient and photo of the paper
- Refills counted on every sale
- Refill reminders

GET STARTED IN 3 STEPS

1. **Record a prescription.** Patient, doctor, medicines and photo.
2. **Dispense at the till.** Controlled medicines only on their prescription.
3. **Send refill reminders.** Before the patient runs out.

Prescriptions

Every prescription the pharmacy dispenses: the patient, the doctor, the medicines with their dose and quantity, a photo of the paper and the refills left. A controlled medicine is sold only on a prescription, never beyond the quantity written, and each sale on it is kept as one fill. Part of the Prescriptions & refills add-on for pharmacies.



Prescriptions · demo store: Pharmacy

1. On the pharmacy POS, add the medicines to the cart and tap Prescription. Find the patient's prescription, or press New prescription and type the patient, the doctor and the refills; the cart's prescription medicines are listed on it.
2. Charge the sale as usual. It is kept as one fill of the prescription, and the next refill date is set from the days one fill lasts.
3. Open Sales → Prescriptions to see the refills due, add a photo of the paper, or press WhatsApp to remind the patient of the next refill.

Tips. A medicine is controlled when Controlled medicine is ticked on its product. A sale of it without a prescription, beyond the quantity written, or on a prescription that is used up, expired or cancelled is refused. A refill reminder is added to the notifications a few days before each refill is due (3 unless you pick another on the prescription).

08

Insurance claims

Add-on module | For: Pharmacy, Hospital & medical centre, Opticals

The patient pays the co-pay, the insurer pays the rest

Bill a patient's medicines to their insurance company right at the pharmacy till: the patient pays only the co-pay, worked out from the insurer's % and cap, and the rest stays on the insurer's account. Claim each insurer's sales in monthly batches, record what it paid on each sale and claim the rejected part again.

What you get

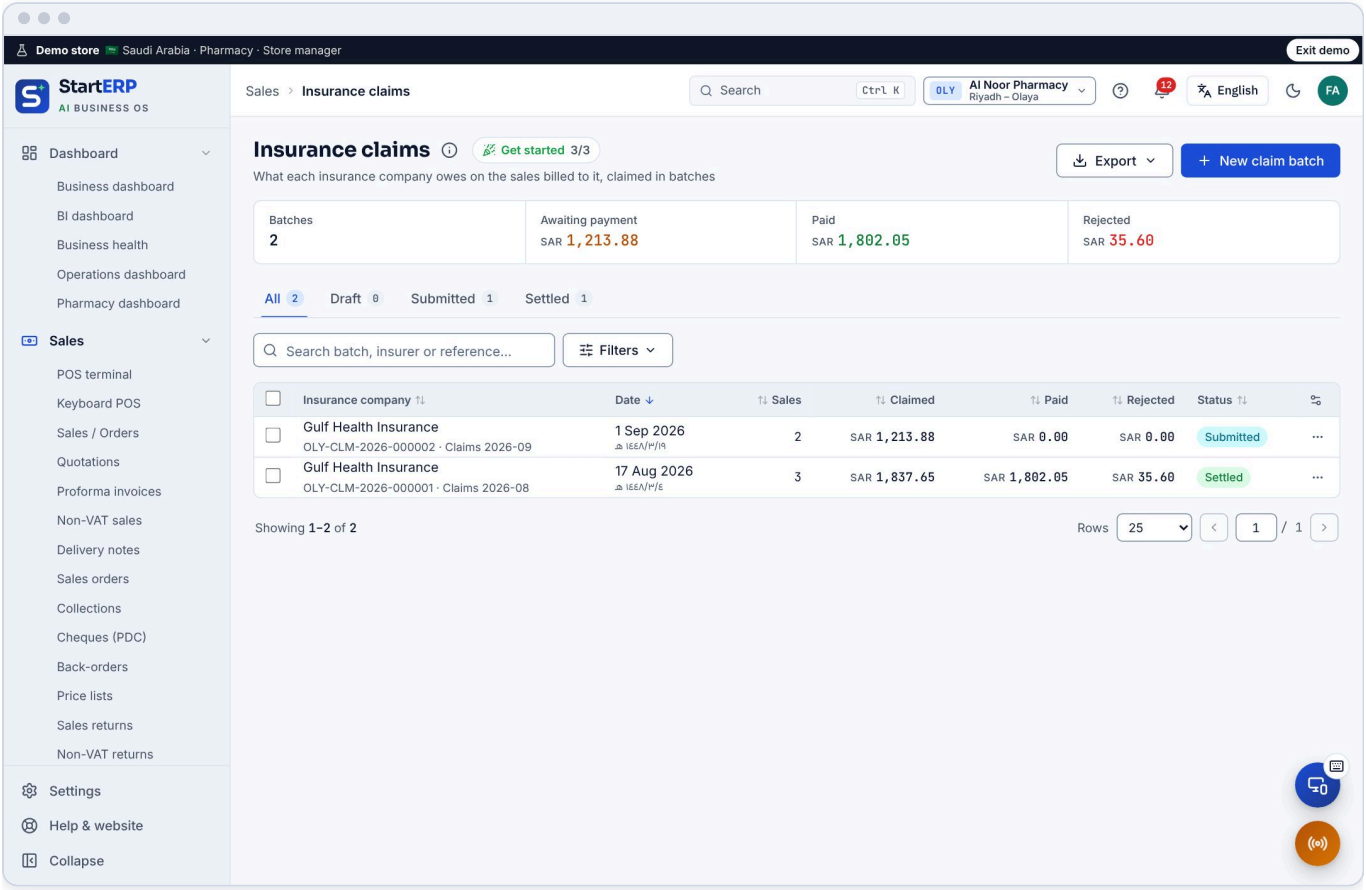
- Co-pay worked out at the till
- Claims in batches per insurer
- Paid and rejected on every sale
- Rejected claims sent again

GET STARTED IN 3 STEPS

1. **Add the insurer.** With its share and cap.
2. **Bill the insured patient.** They pay only the co-pay.
3. **Claim the month.** Batch, record payments, re-claim rejections.

Insurance claims

Bill a patient's medicines to their insurance company: the patient pays only the co-pay and the rest stays on the insurer's account as its claim. Claim each insurer's sales in a batch, submit it, then record what the insurer paid on each sale; a part it rejected stays due and can be claimed again. Part of the Insurance claims add-on for pharmacies.



Insurance claims · demo store: Pharmacy

1. Open the insurance company's customer record (or add it), tick This customer is an insurance company and type the patient's co-pay %, its cap and your payer ID.
2. On the pharmacy POS tap Insurance, choose the insurer and type the patient, the member number and the approval number. The Payment screen puts the claim on the insurer's account; the patient pays the co-pay. On the Sales form, choosing an insurer as the customer shows the same Insurance card.
3. Open Sales → Insurance claims and press New claim batch. Choose the insurer and the dates, tick the sales and save. Press Submit to the insurer when you send it.
4. When the insurer pays, open the batch, type what it paid on each sale it cut (leave the others blank: paid in full) with the reason, and press Record payment. Each sale gets the payment; what was rejected stays due.

Tips. The co-pay is the co-pay % of the sale's total, at most the cap. A different % can be typed on a sale (for example a different class of policy). Optical shops bill vision insurance the same way: the Insurance button is on the optical counter's toolbar, so the insurer pays its share of the frame and lenses and the patient pays the co-pay. A sale in a batch that is not settled yet keeps its customer, amounts and member details. A rejected part shows again under New claim batch, so you can send it with the approval the insurer asked for.

09

Drug tracking (SFDA RSD)

Add-on module | For: Pharmacy, Hospital & medical centre | Saudi Arabia only

Every medicine pack reported to SFDA's RSD

Scan the 2D barcode of each pack you receive, sell, return or take off the shelf; StartERP keeps the notice SFDA's track and trace system needs with the GTIN, serial, batch and expiry, checks every check digit, exports the pending ones as one file for the RSD portal and keeps SFDA's answer on each.

What you get

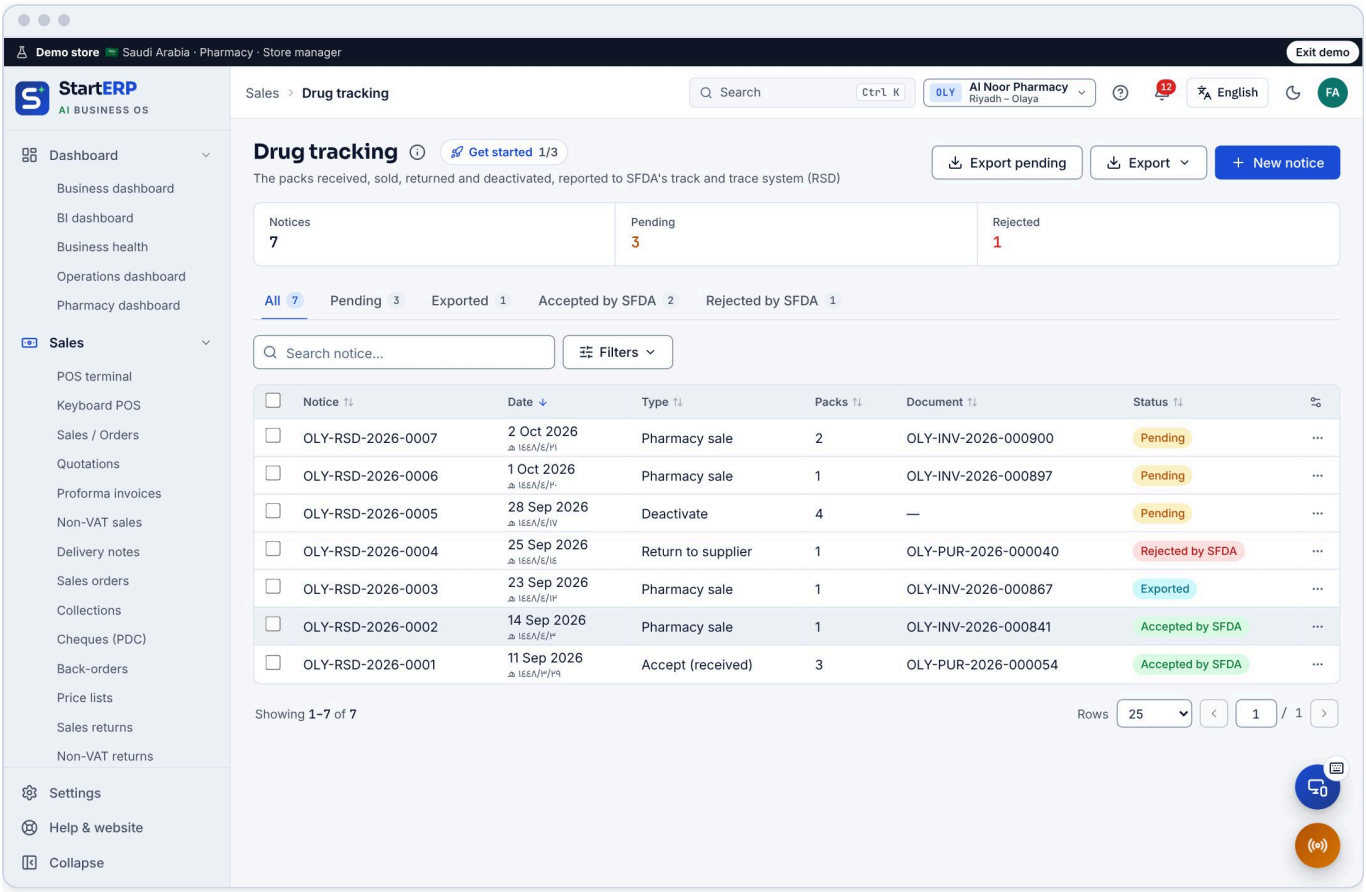
- Packs read from the 2D barcode
- Accept, sale, cancel, return and deactivate
- One export file for the RSD portal
- SFDA's answer kept on each notice

GET STARTED IN 3 STEPS

1. **Enter your SFDA details.** Your pharmacy's GLN.
2. **Scan packs as you receive.** The 2D barcode on each pack.
3. **Export pending notices.** One file for the RSD portal.

Drug tracking (SFDA RSD)

The notices a Saudi pharmacy owes SFDA's drug track and trace system (RSD) for each medicine pack: accepted from the supplier, sold to a patient, a sale cancelled, returned to the supplier or deactivated. Each pack is read from its 2D barcode (GTIN, serial, batch and expiry). SFDA gives the web service files only to a registered pharmacy, so the pending notices go out as one file you upload on the RSD portal, and you record SFDA's answer on each. Part of the Drug tracking add-on for Saudi pharmacies.



Drug tracking (SFDA RSD) · demo store: Pharmacy, Saudi Arabia

1. Register your pharmacy with SFDA's RSD system first; SFDA gives it a 13-digit GLN and a portal account.
2. Open Sales → Drug tracking and press New notice. Choose the type: Accept when stock arrives, Pharmacy sale when you dispense, Sale cancel, Return to supplier, or Deactivate (expired, damaged, recalled…).
3. Enter your pharmacy GLN once (new notices take it from the last one), then scan the 2D barcode of each pack with the scanner in the scan box. For a whole batch without serials, type it under Type a pack or a whole batch instead. Press Save notice.
4. On the list press Export pending: the pending notices download as one file and become Exported. Upload it on the RSD portal, then open each notice and set SFDA's answer (Accepted or Rejected, with its notification ID and message).

Tips. Every GTIN and GLN is checked by its check digit, and a pack scanned twice on one notice is refused. Once a notice is exported its type, packs and GLNs no longer change, as they were sent; only SFDA's answer and the notes do. Fix a mistake with a new notice, for example a Sale cancel. The Rejected tab lists what SFDA refused, with its message, so you can send it again correctly.

10

Prescription history

Add-on module | For: Opticals

Every patient's eyes, visit after visit

The right eye, left eye and PD typed on each lens order at the optical POS build the patient's prescription history, newest first, with a flag when the prescription changed since the visit before. The board shows when each patient's next eye test is due, overdue first, so you can remind them on WhatsApp in one tap and bring them back for new lenses.

What you get

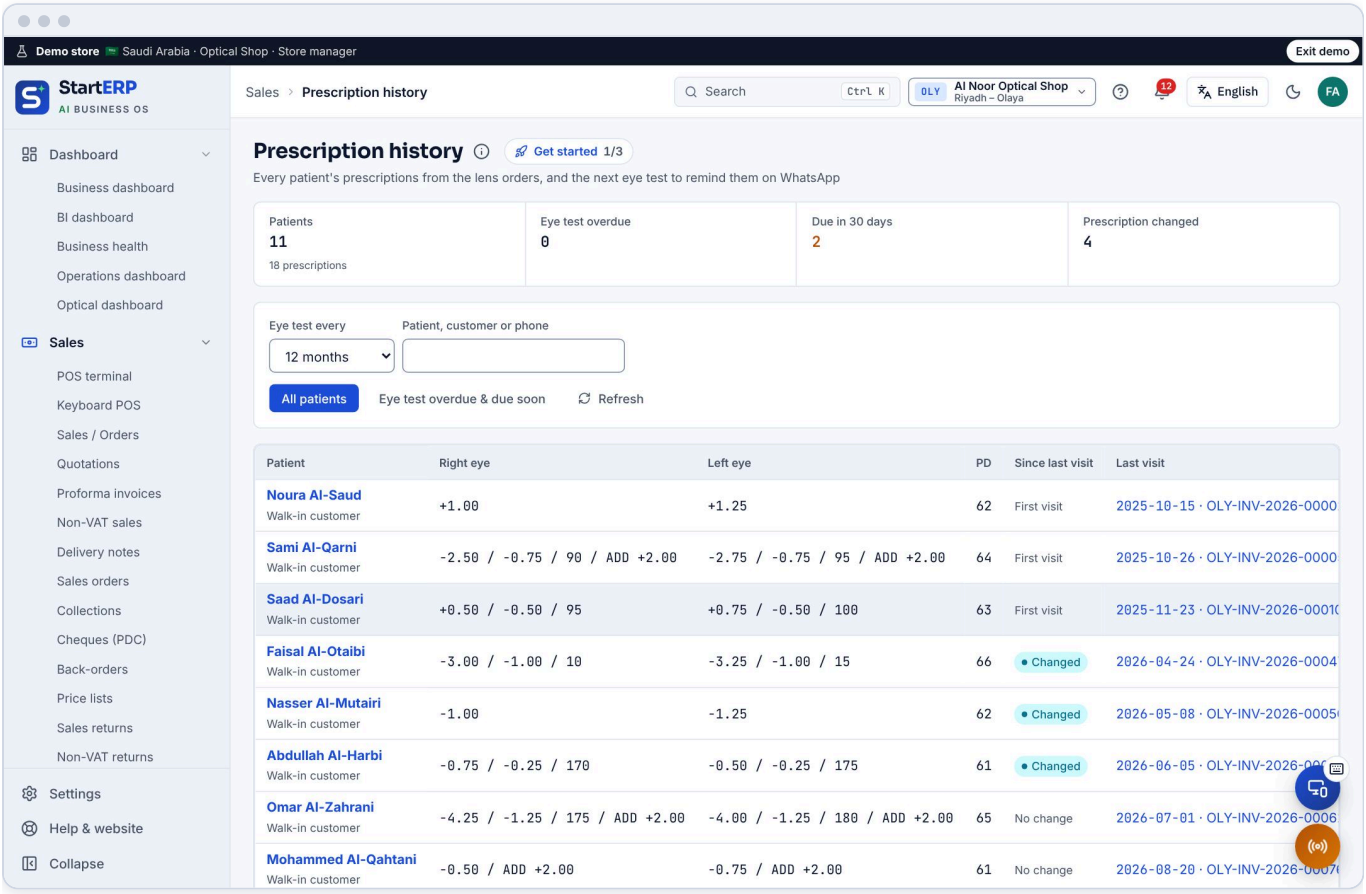
- Prescriptions per patient, newest first
- Changed since the last visit
- Next eye test due
- WhatsApp reminder in one tap

GET STARTED IN 3 STEPS

1. **Type the prescription on the order.** Right, left eye and PD at the optical POS.
2. **Open the patient's history.** Changes are flagged.
3. **Remind tests that are due.** One tap on WhatsApp.

Prescription history

Every patient's prescriptions, from the right eye, left eye and PD typed on each lens order at the optical POS, newest first, with a flag when the prescription changed since the visit before and the day the next eye test is due. Part of the Prescription history add-on for optical shops.



Prescription history · demo store: Optical Shop

1. On the optical POS, tap prescription lenses, then type the patient's name, each eye's prescription and the PD, and bill it to the customer.
2. Open Sales → Prescription history to see every patient's latest prescription and next eye test; type a patient, customer or phone to find one.
3. Open a patient for every prescription, newest first. Press WhatsApp to send the customer a reminder of the next eye test, ready to edit before you send it.

Tips. The next eye test is the last visit plus "Eye test every" (12 months unless you pick another). "Eye test overdue & due soon" shows the patients overdue or due within 30 days. Family members billed to one customer each keep their own history, by the patient name typed at the till.

11 Eye tests & prescriptions

Add-on module | For: Opticals

Every eye test on file, with the recall when it runs out

Write each eye test as the optometrist reads it: sphere, cylinder, axis, add, prism and visual acuity for each eye, the PD and the contact lens fit, checked against the ranges and quarter steps of a real prescription. The prescription prints for the patient, is valid for the months you set, and the recall board lists who runs out first so the shop can call them back for a new test and new lenses.

What you get

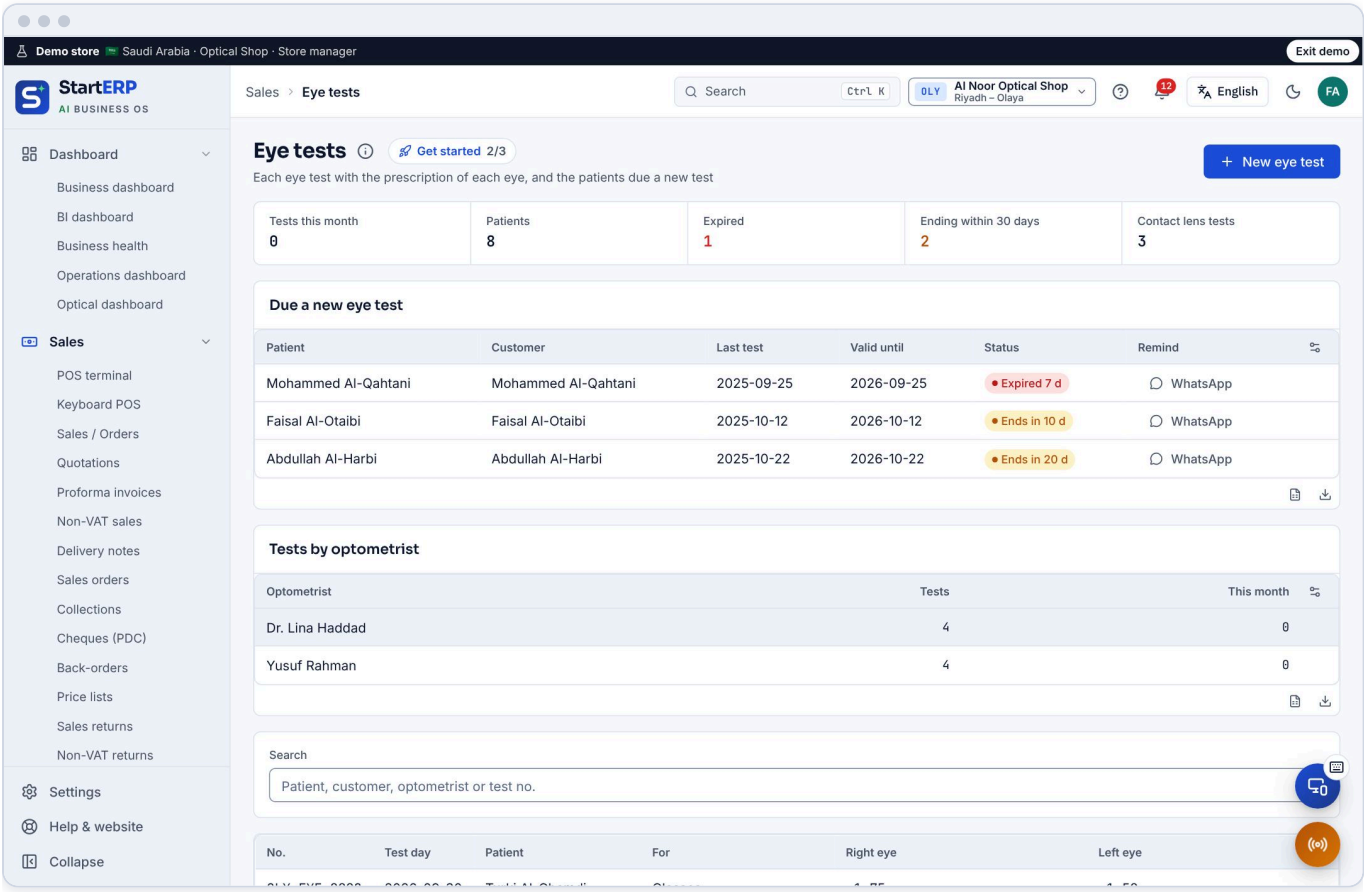
- Both eyes checked as you type
- Printed prescription for the patient
- Recall when the prescription runs out
- Tests per optometrist this month

GET STARTED IN 3 STEPS

1. **Write the eye test.** Both eyes, PD and how long it is valid.
2. **Print the prescription.** One page for the patient.
3. **Call back who runs out.** Expired first on the recall board.

Eye tests & prescriptions

Each eye test the optometrist does, recorded the way it is written: SPH, CYL, AXIS, ADD, prism and visual acuity for the right and left eye, the distance and near PD, and for contact lenses the brand and fitting. Each test is valid for 12 months unless you pick another, and the board shows the patients whose prescription expired or ends within 30 days, to call them back for a new test. Part of the Eye tests & prescriptions add-on for optical shops.



Eye tests & prescriptions · demo store: Optical Shop

1. Open Sales → Eye tests and press New eye test: pick the customer, type the patient's name if it is a family member, the optometrist and the test day.
2. Type each eye's SPH, CYL and AXIS (an axis is needed with a cylinder), the ADD for reading or progressive lenses, prism and VA, then the PD. Values go in steps of 0.25.
3. Save, then press Print prescription to give the patient the card. From the board press WhatsApp beside a patient due a new test to send a reminder, ready to edit.

Tips. With Lens lab orders, pick the eye test on the lab order so the lab gets the exact prescription. Prescriptions are health data: StartAI never reads them. It can only tell you how many patients are due a new test, and StartAI Radio says it in the morning.

12

Lens lab orders

Add-on module | For: Opticals

Every pair of glasses tracked from the lab to the patient

Order the lenses from the lab with the frame, lens type, index and coatings, the lab's cost and the price sold. Each job moves from ordered to at the lab, received, ready and collected, with the day of every step, so late jobs and glasses waiting on the shelf come first. A remake keeps its reason, the lab's on-time rate and remake rate show which lab to trust, and the patient gets a WhatsApp message when the glasses are ready.

What you get

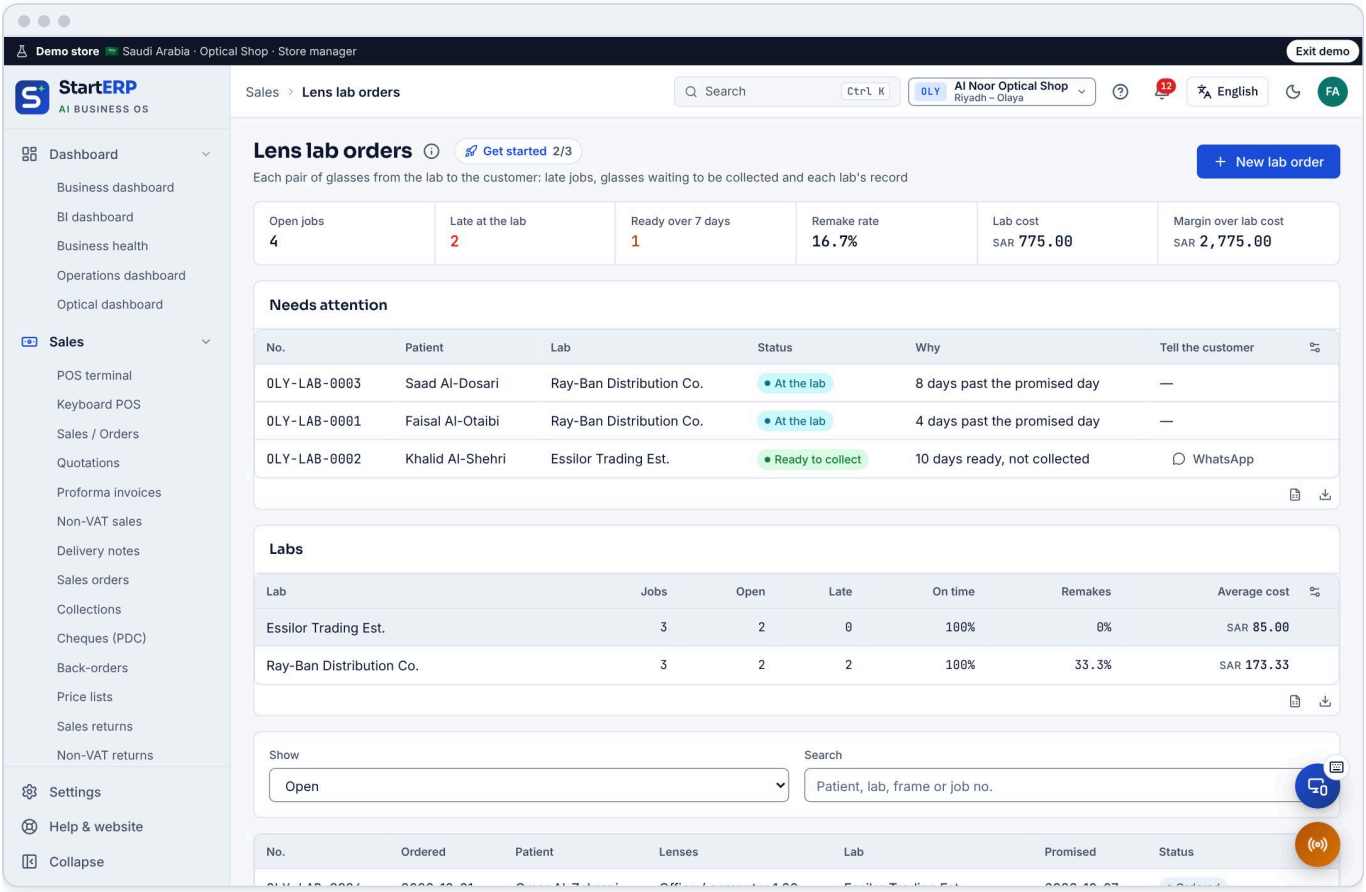
- Late at the lab, first on the board
- Glasses waiting to be collected
- Remakes with their reason
- Each lab's on-time and remake rate

GET STARTED IN 3 STEPS

1. **Order the lenses from the lab.** Frame, lens, coatings and promised day.
2. **Move each job a step.** At the lab, received, ready, collected.
3. **Tell the patient it is ready.** One tap on WhatsApp.

Lens lab orders

Every pair of glasses ordered from a lab, from the order to the customer collecting it: the lens type, index, coatings and frame, the lab and its job number, the lab's cost and the price, and the day the lab promised. The board shows the jobs past the promised day, the glasses ready and not collected for more than 7 days, each lab's on-time and remake rates and the margin over the lab's cost. Part of the Lens lab orders add-on for optical shops.



Lens lab orders · demo store: Optical Shop

1. Open Sales → Lens lab orders and press New lab order: pick the customer, the invoice and the eye test, then the lens type, index, coatings, frame, the lab, its cost and the promised day.
2. Move the job on as it goes: Sent to the lab, Received from the lab, Ready to collect (WhatsApp tells the customer) and Collected.
3. If the lenses come back wrong, press Remake with the reason: the job goes back to the lab and counts against that lab's remake rate.

Tips. Labs are vendors: add each lab once under Purchases → Vendors. StartAI can list the late jobs and compare the labs, and record or move a job for you. StartAI Radio says it when a job is past the promised day or glasses wait over a week.

13 Contact lens reorders

Add-on module | For: Opticals

Know who runs out of contact lenses before they do

Set how many days a box of each contact lens lasts on the product. Each customer's latest sale of it, boxes times days, tells the day the lenses run out: the board lists who has run out and who runs out within two weeks, with a WhatsApp reminder in one tap, so the wearer buys the next box from you.

What you get

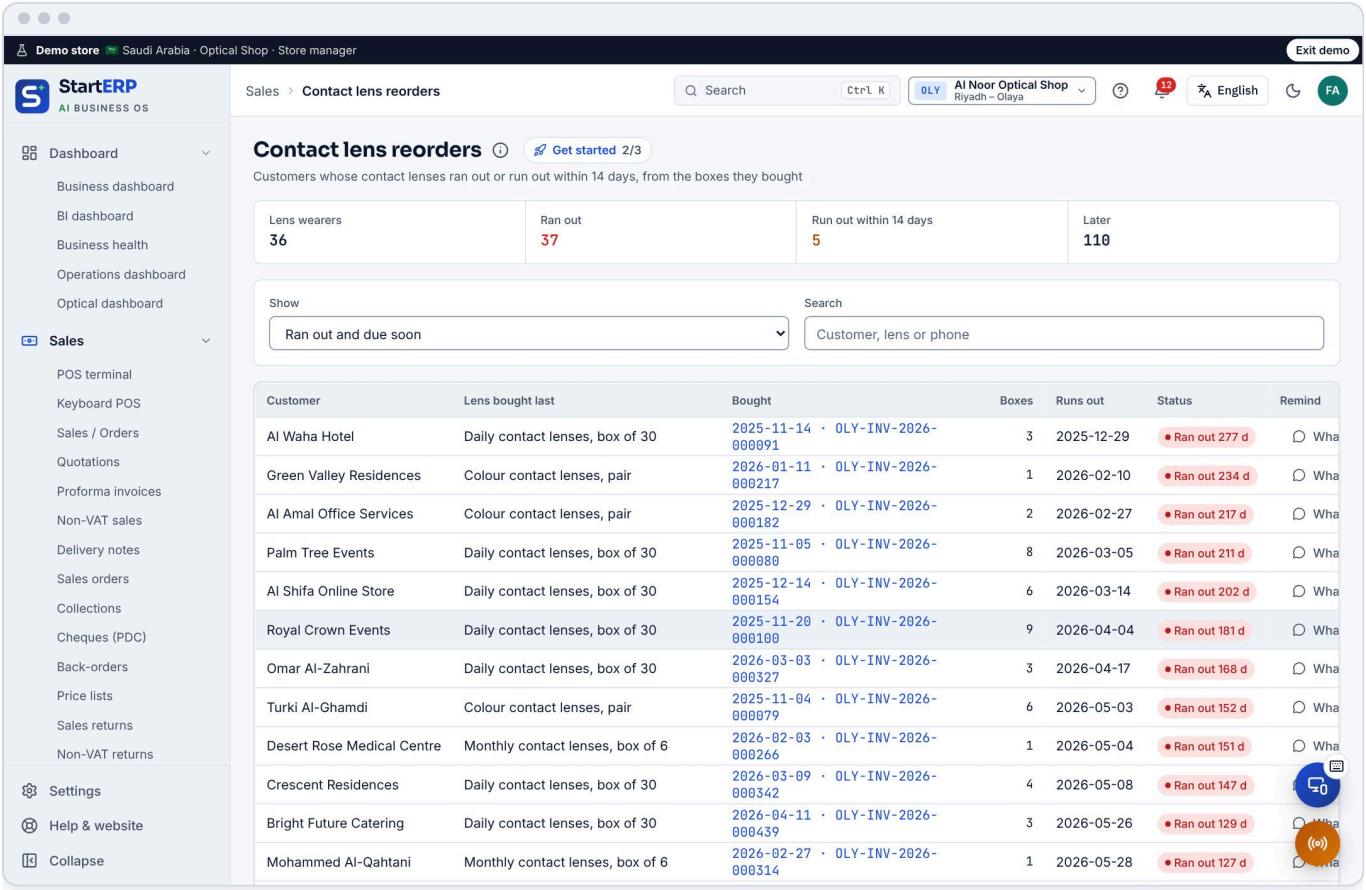
- Days per box on each lens
- Run-out day from the latest sale
- Out and due within two weeks
- WhatsApp reminder in one tap

GET STARTED IN 3 STEPS

1. **Set days per box on the lenses.** On each contact lens product.
2. **Sell the boxes at the till.** The latest sale counts.
3. **Remind who runs out.** Out and due within two weeks.

Contact lens reorders

The customers whose contact lenses run out, worked out from what they bought: each contact lens product carries the days one box lasts, so a sale of two boxes of 30-day lenses lasts 60 days. The board lists the customers who ran out or run out within 14 days first, with the lens they bought last and a WhatsApp reminder. Part of the Contact lens reorders add-on for optical shops.



Contact lens reorders · demo store: Optical Shop

1. Open each contact lens product and type "Days one box lasts" (a box of 30 daily lenses for both eyes: 15; a box of 6 monthly lenses for one eye: 180).
2. Sell the lenses to the customer as usual. Open Sales → Contact lens reorders to see who runs out next.
3. Press WhatsApp beside a customer to send a reminder with the lens they bought last, ready to edit.

Tips. Only the latest sale of each lens counts: a customer who bought again is not reminded early. StartAI can list the customers running out, and StartAI Radio says how many in the morning.

14

Wards & beds

Add-on module

For: Hospital & medical centre, Ayurveda hospital & Panchakarma centre

Every bed of the hospital, live

Add each ward's beds with their kind and price per day, and the bed board shows them all at once: free, occupied with the patient, the IP number from their bill, the doctor and the days in, being cleaned, or out of service. Admit a patient to a free bed in one step, discharge them and the bed goes to cleaning until housekeeping marks it ready. The occupancy, the free beds and the patients due out today are counted for you, and one IP number can never lie in two beds. Only the name, IP number and doctor are kept on a bed, never a diagnosis.

What you get

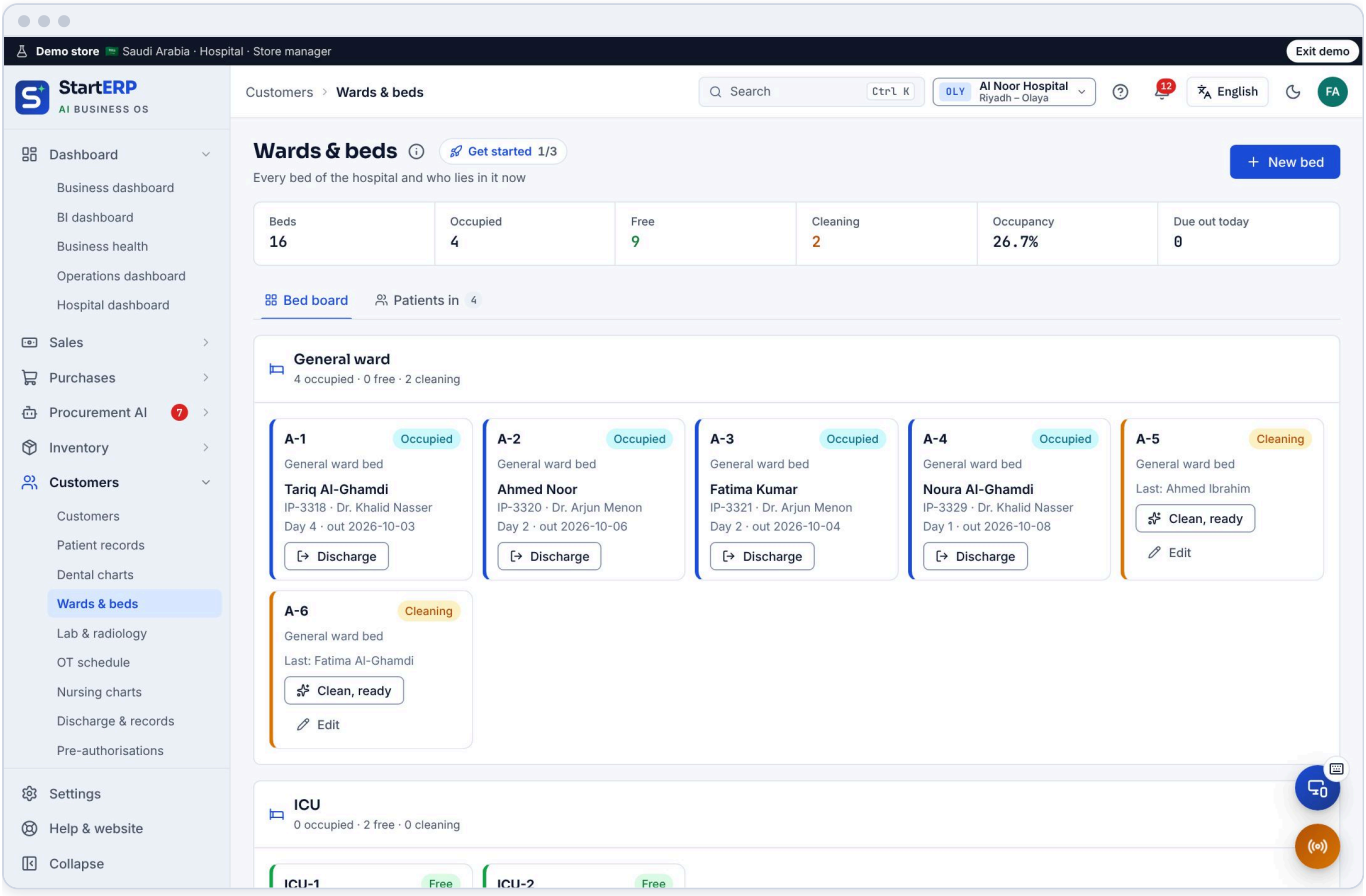
- Every bed by ward on one board
- Admit with the IP number from the bill
- Discharge, cleaning and back in service
- Occupancy and patients due out today

GET STARTED IN 3 STEPS

1. **Add the beds.** Ward, bed code, kind and price per day.
2. **Admit a patient.** Pick a free bed and type the IP number from the bill.
3. **Discharge and clean.** The bed is free again once marked clean.

Wards & beds

Every bed of the hospital by ward and who lies in it now (Wards & beds add-on). A bed is free, occupied with the patient, the IP number from their bill, the doctor and the days in, being cleaned, or out of service; the occupancy and the patients due out today are counted for you.



Wards & beds · demo store: Hospital

1. Open Wards & beds and press New bed. Type the ward or unit, the bed's code, its kind and its price per day.
2. Press Admit on a free bed and type the patient's name, the IP number from their bill, the doctor, the admission day and the expected discharge.
3. Press Discharge when the patient leaves: the bed goes to Cleaning. Press Clean, ready when housekeeping is done and it is free again.
4. The Patients in tab lists the patients in a bed now, longest in first, with the expected discharge (due today or earlier is flagged).

Tips. One IP number can lie in one bed only: to move a patient, discharge them from the first bed and admit them to the new one. Only the name, IP number, doctor, bystander and diet are kept on a bed, never a diagnosis; clinical notes stay in Patient records. Ayurveda hospitals add their rooms and cottages as beds of the kind Cottage, and note the bystander who stays with the patient and the diet the kitchen sends (Kanji, no salt) when they admit; both are cleared at discharge. Out of service beds are left out of the occupancy. Bill room and ICU days at the hospital POS with the same IP number.

15

Lab & radiology

Add-on module | For: Hospital & medical centre

Every test from the till to the report

Each lab test and scan billed on the hospital POS lands on the lab's worklist with the patient, the IP or bill number and the doctor, in one press. The lab marks the sample taken, in the lab, reported and handed over, and every step keeps its time. Routine, urgent and STAT orders get their turnaround target, the late ones are flagged first, and the average turnaround and the share reported on time are worked out for you. Results stay in the analyser or the report: no finding is kept on an order.

What you get

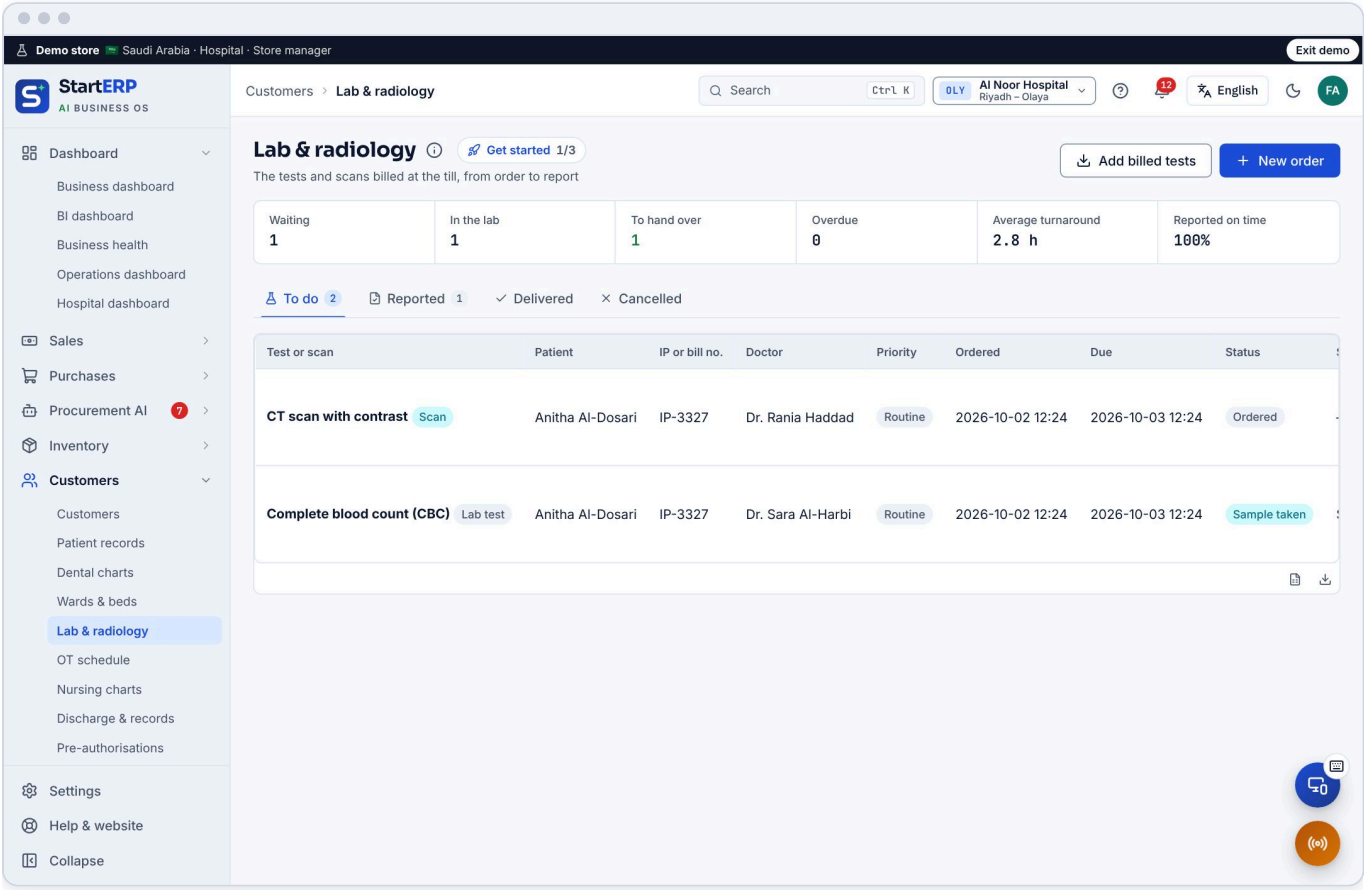
- The billed tests on one worklist
- Sample, lab, report and handover times
- Urgent and STAT targets, overdue first
- Average turnaround and on-time share

GET STARTED IN 3 STEPS

1. **Bring in the billed tests.** Press Add billed tests after billing them at the till.
2. **Mark the sample and the lab.** Each step keeps its time; late tests come first.
3. **Report and hand over.** The turnaround and on-time share are counted.

Lab & radiology

The lab's and radiology's worklist (Lab & radiology add-on): every lab test and scan billed on the hospital POS with the patient, the IP or bill number, the doctor and the priority, from the order to the sample, the lab, the report and the handover, each step with its time. Overdue orders are flagged and the average turnaround is worked out for you.



Lab & radiology · demo store: Hospital

1. Bill the tests and scans on the hospital POS under Laboratory or Radiology. Open Lab & radiology and press Add billed tests: each line of today's and yesterday's bills becomes an order once.
2. Press New order for a test not billed yet, with the patient, the IP or bill number, the doctor and the priority: routine (24 hours), urgent (4 hours) or STAT (1 hour).
3. On the To do tab press Sample taken when the sample is drawn (a scan goes straight to In the lab), then In the lab and Reported. Type the sample and report numbers with Edit.
4. On the Reported tab press Handed over when the report reaches the patient or the ward.

Tips. Overdue orders (past their target and not reported) come first, in red. The figures at the top show the average turnaround and the share reported on time. Results stay in the analyser, the imaging system or the printed report: no result or finding is kept on an order. An order only moves forward; cancel one that was billed by mistake and refund it at the till.

16

OT scheduling

Add-on module | For: Hospital & medical centre

Every theatre's day, case by case

Book each operation in its theatre with the time, how long it takes, the surgeon, the anaesthetist, the patient and the IP number from the bill. A theatre already taken or a surgeon already in another theatre at that time is refused, so no two cases clash. Before the patient goes in, the sign-in checks are ticked: consent signed, fasting confirmed, site marked and blood arranged; only then does the case start. Each case keeps the real start and end, and the day shows the cases waiting, in theatre and done, the theatre use and the late starts. No diagnosis or operative note is kept here.

What you get

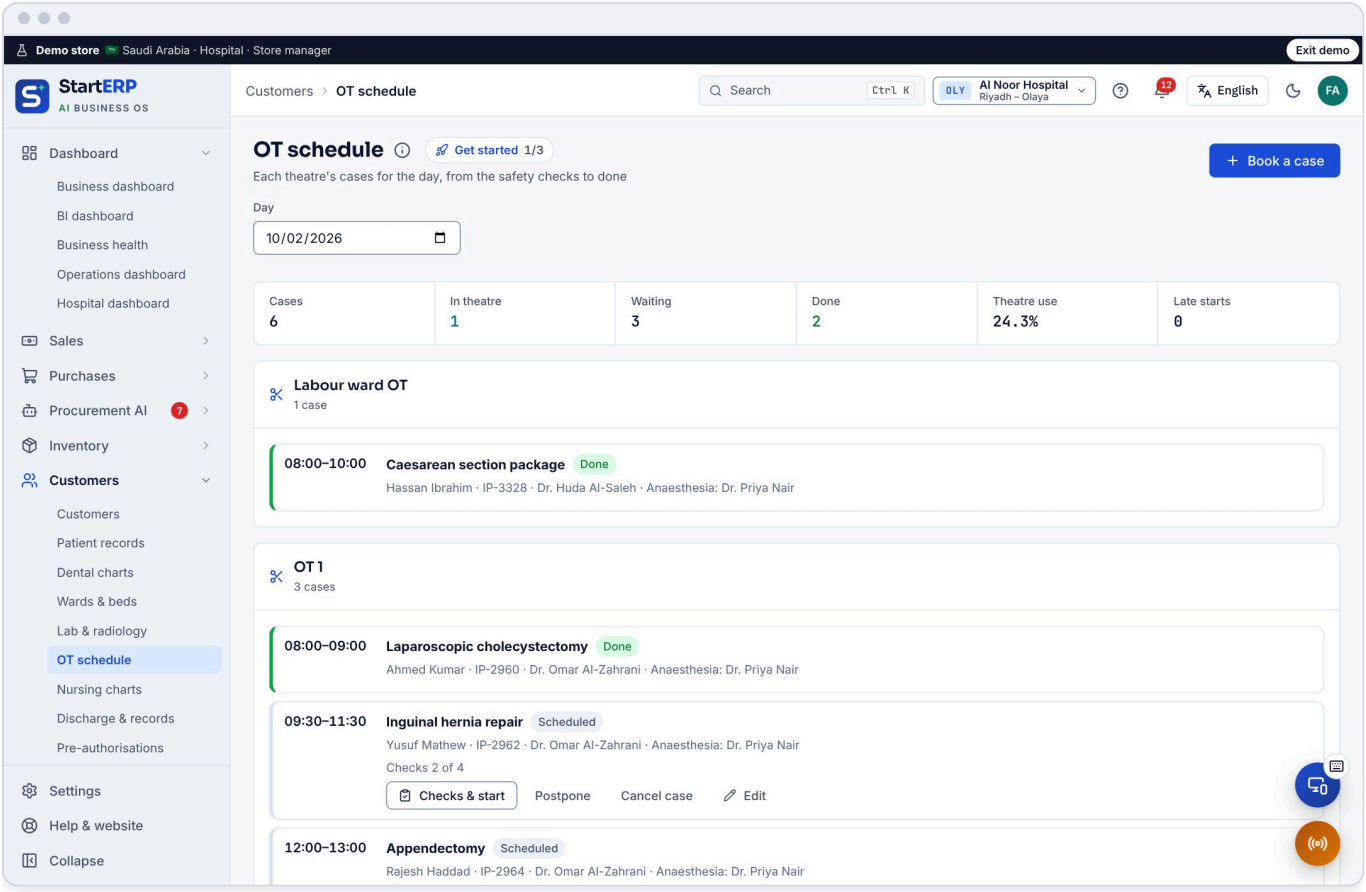
- Each theatre's list for the day
- No theatre or surgeon booked twice
- Safety checks before the start
- Theatre use and late starts

GET STARTED IN 3 STEPS

1. **Book the cases.** Theatre, time, surgeon and patient for each operation.
2. **Tick the checks and start.** Consent, fasting, site and blood before it starts.
3. **Mark it done.** The real times, theatre use and late starts are kept.

OT schedule

The operating theatres' list for a day (OT scheduling add-on): each case in its theatre with the time, the length, the procedure, the patient and IP number, the surgeon and the anaesthetist, from booked to the sign-in safety checks, in theatre and done. A theatre or surgeon already busy at that time is refused.



OT schedule · demo store: Hospital

1. Open OT schedule and press Book a case. Type the theatre, the procedure, the patient and the IP number from the bill, the surgeon and anaesthetist, the day, the start time and the minutes it takes.
2. Pick the day at the top to see each theatre's cases in time order, with how many of the four checks are ticked.
3. When the patient arrives press Checks & start, tick consent signed, fasting confirmed, site marked and blood arranged, then Into theatre.
4. Press Done when the case ends. Postpone or cancel a case that will not go ahead; a postponed case can be rebooked.

Tips. Back-to-back cases are fine; an overlap in the same theatre, or the same surgeon in two theatres at once, is refused. Theatre use counts the booked minutes against a 12-hour day per theatre; a late start is a case begun more than 10 minutes after its slot. Bill the surgery package at the hospital POS with the same IP number; no diagnosis or operative note is kept on a booking.

17

Doctor orders & nursing

Add-on module | For: Hospital & medical centre

Every dose, sign and note, signed

Open a chart for each admitted patient, straight from the bed board. The doctor's orders go in with the dose, the route and how often, and their times follow: twice a day falls due at 08:00 and 20:00. The medicine round lists the day's doses in time order, the overdue ones flagged, and the nurse marks each one given, held or refused with the reason. Vitals are charted with the fever, low oxygen or blood pressure out of range picked out, intake and output give the 24-hour balance, and the notes keep the shift's observations. Every entry carries who wrote it and when and is never changed or deleted; an order is stopped, not removed. The charts are open only to clinical staff and are never read by StartAI.

What you get

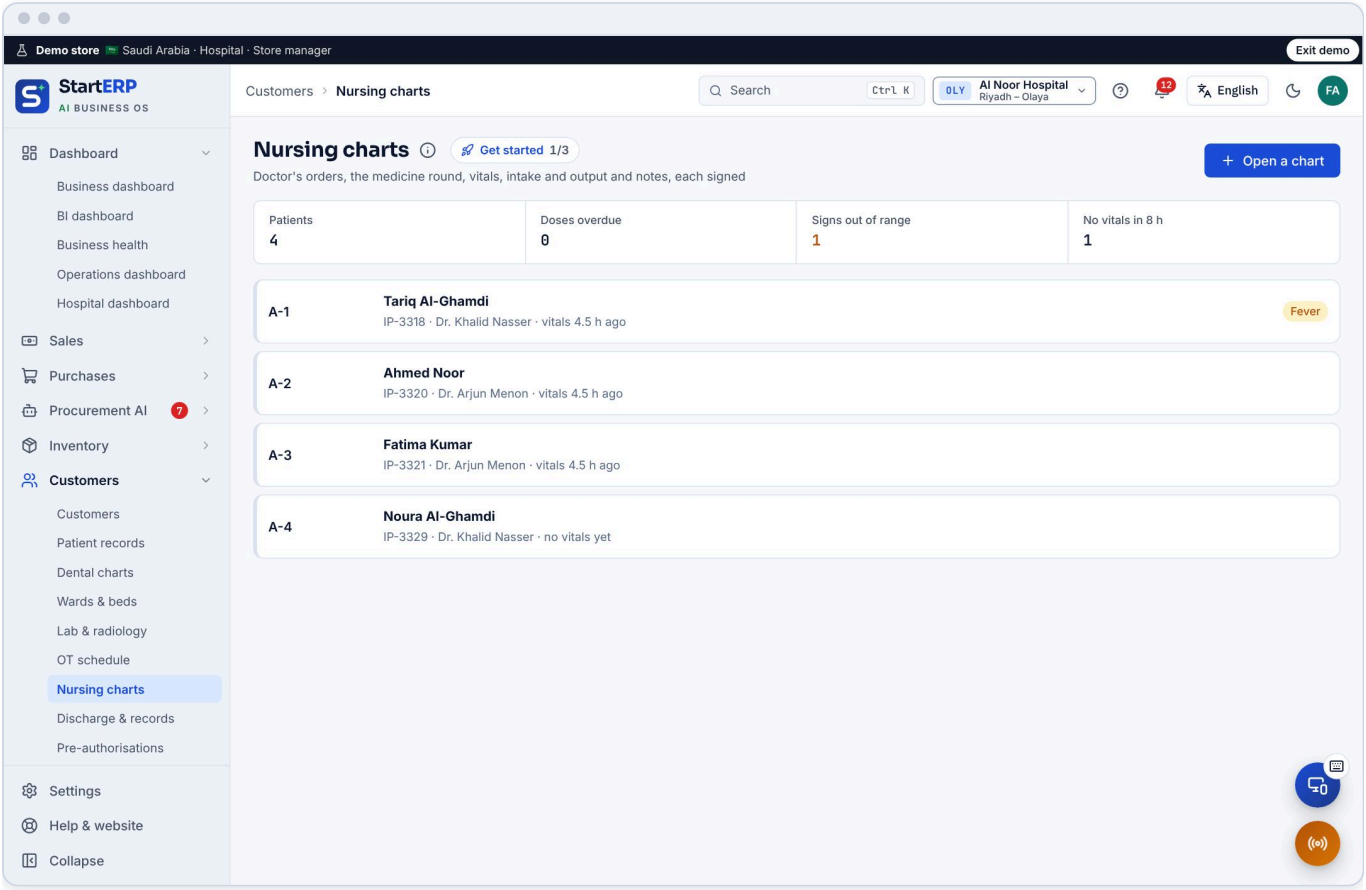
- Doctor's orders with their times
- Medicine round, each dose signed
- Vitals with the signs out of range
- Entries never changed or deleted

GET STARTED IN 3 STEPS

1. **Open a chart.** One for each admitted patient, from the bed.
2. **Write the doctor's orders.** Medicine with dose, route and how often.
3. **Chart the round and vitals.** Each dose given, held or refused, signed.

Nursing charts

Each admitted patient's chart (Doctor orders & nursing add-on): the doctor's orders with dose, route and how often, the medicine round with each dose given, held or refused, vitals with the signs out of range flagged, intake and output with the 24-hour balance, and nursing notes. Every entry carries who wrote it and when and never changes. Open only to roles with "Can open patient records".



Nursing charts · demo store: Hospital

1. Open Nursing charts and press Open a chart. Pick the patient's bed (the IP number, name and doctor fill in) or type them, add any allergies, and open it.
2. On the Orders tab press New order. For a medicine give the dose, the route and how often; the times follow (twice a day is 08:00 and 20:00). Diet, investigations, procedures and nursing care are orders too. Press Stop when the doctor stops one.
3. On the Medicine round tab mark each dose Given, or Held or Refused with the reason. Overdue doses (an hour past) are shown in red; medicines given when needed have Give now.
4. Record vitals, intake and output and notes on their tabs. The ward list shows each patient's overdue doses, the signs out of range and how long since the last vitals.

Tips. Entries are never edited or deleted: write a new note to correct one. Close the chart when the patient goes home; a closed chart takes no more entries. Flagged signs: temperature 38 °C or more or under 36, pulse over 110 or under 50, breathing over 24 or under 10, oxygen under 92%, systolic under 90 or over 180, pain 7 or more. Switch on "Can open patient records" for the nurses' and doctors' role in Users → RBAC. Each chart's reads and changes go to the patient's access log, and StartAI never reads the charts.

18

Discharge & medical records

Add-on module | For: Hospital & medical centre

Every discharge summarised, every file coded

Start a discharge summary when a patient goes home, straight from the bed board. The doctor writes the ICD-10 diagnoses, the course in hospital, the medicines to take home, the follow-up and when to come back at once, then signs it; a signed summary is kept as written and later findings go in an addendum, each signed. A referral says where the patient went, a death the cause. The records room works its own list: each file received, the consent forms and orders checked, then coded, with the files waiting, the ones incomplete, those lent to a doctor or an insurer and back, and the files that took more than a day to arrive. Each record is kept ten years. The summaries are open only to clinical staff, never deleted and never read by StartAI.

What you get

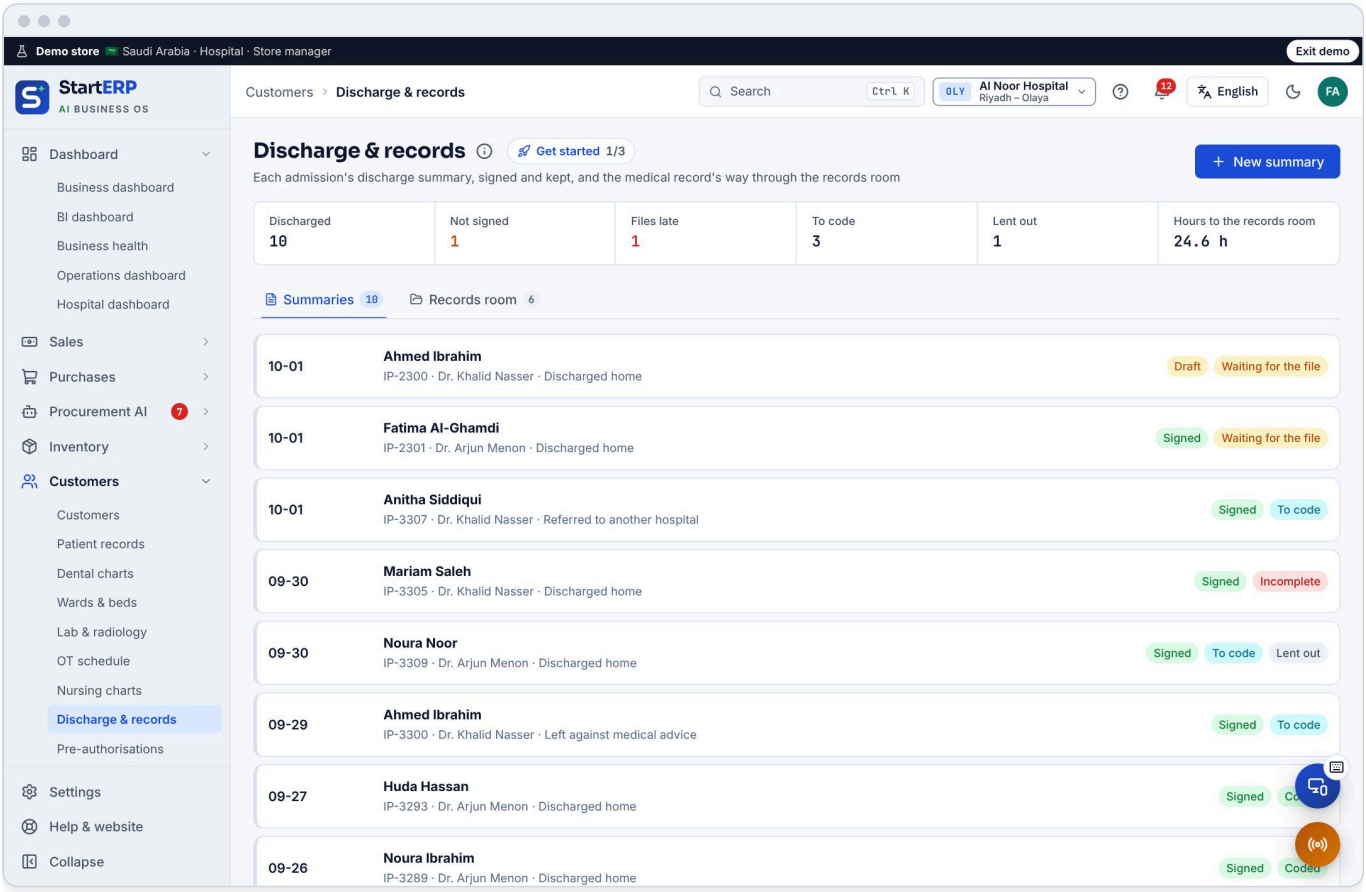
- ICD-10 discharge summaries, signed
- Kept as written, addenda only
- Records room worklist and coding
- Files lent out and files late

GET STARTED IN 3 STEPS

1. **Start a summary.** When a patient goes home, from the bed.
2. **Write and sign it.** ICD-10 diagnoses, course, medicines, follow-up.
3. **Receive and code the file.** The records room checks it, codes it and lends it.

Discharge & records

Each admission's discharge summary and the records room (Discharge & medical records add-on): the ICD-10 diagnoses, the course in hospital, the medicines to take home, the follow-up and when to come back at once, signed by the doctor and then kept as written, with addenda for later findings; and each file's way through the records room, received, checked, coded and lent out and back. Open only to roles with "Can open patient records".



Discharge & records · demo store: Hospital

1. Open Discharge & records and press New summary. Pick the patient's bed (the IP number, name, doctor and admission day fill in) or type them, choose the discharge type and the time, and start it.
2. Write the diagnoses with their ICD-10 codes (the first is the primary one), the course in hospital, the condition at discharge, the medicines, the follow-up day and when to come back at once. A referral needs the hospital it went to; a death needs the cause. Save draft as you go.
3. Press Sign the summary. It needs a diagnosis, the course and (but for a death) the emergency advice, and is stamped with your name and the time. After that it never changes: add a later finding as an addendum.
4. In the records room press File received when the file arrives, tick the consent forms and the orders, then Mark coded. Lend the file to a doctor, an audit or an insurer and press File returned when it is back. The Records room tab lists every file by stage.

Tips. A file is late when it is not in the records room within 24 hours of the discharge. The average hours to the records room shows how fast the wards send their files. A file is coded only once the summary is signed and the file received. Each record is kept ten years after the discharge; summaries are never deleted. Switch on "Can open patient records" for the doctors' and records staff's role in Users → RBAC. Each summary's reads and changes go to the patient's access log, and StartAI never reads the summaries.

19

Insurance pre-authorisation

Add-on module | For: Hospital & medical centre

Every insured stay approved and paid

When an insured patient is admitted, send the request to the insurer or TPA with the member and policy numbers, the diagnosis and the estimated cost, picked straight from the bed. Record each answer as it comes: the insurer's question and your reply, the approved amount with its approval number, more asked when the stay runs longer, then the final bill. What the bill is above the approval is the patient's to pay, and when the insurer settles, what it did not pay shows as disallowed. The open requests are listed longest wait first, with those waiting over a day for the insurer picked out, and each insurer's approved, billed, settled and disallowed amounts. StartAI reads the board and records a step for you; it never reads the diagnosis.

What you get

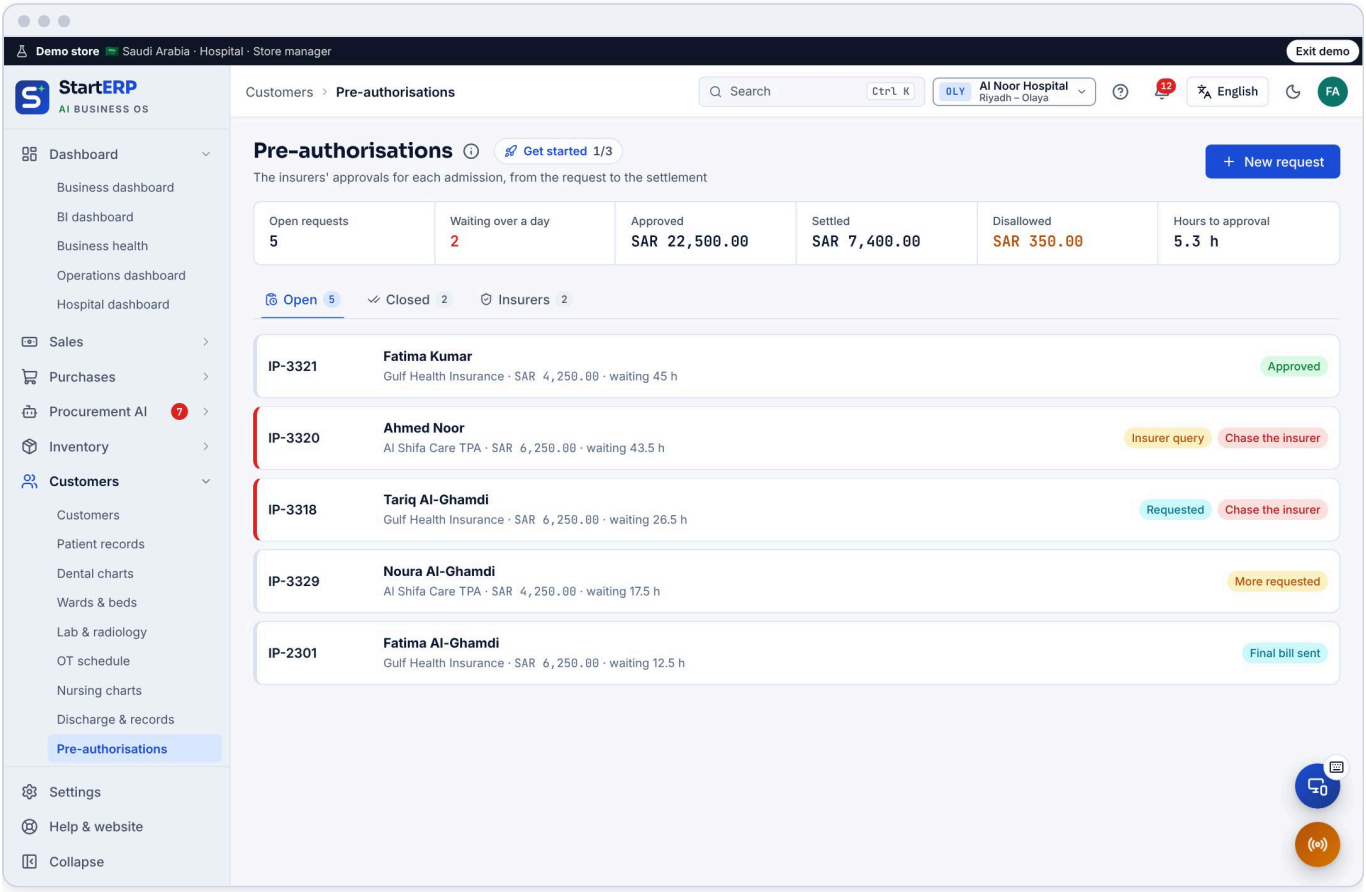
- Request from the bed in a minute
- Queries, approval and more asked
- Requests waiting over a day flagged
- Patient share and disallowed amounts

GET STARTED IN 3 STEPS

1. **Send a request.** For an insured patient, from the bed.
2. **Record the insurer's answer.** A query, the approval no. or more asked.
3. **Bill and settle.** The final bill, then what the insurer paid.

Pre-authorisations

The insurer's approval for each insured admission (Insurance pre-authorisation add-on): the request with the member and policy numbers, the diagnosis and the estimated cost, the insurer's queries, the approved amount and approval number, more asked for a longer stay, the final bill and the settlement. The board lists the open requests longest wait first, with each insurer's approved, billed, settled and disallowed amounts.



Pre-authorisations · demo store: Hospital

1. Open Pre-authorisations and press New request. Pick the patient's bed (the IP number, name and admission day fill in) or type them, then the insurer or TPA, the member and policy numbers, the diagnosis and the estimated cost, and send it.
2. When the insurer asks something, press Insurer query and write the question; press Query answered once you reply. When it approves, press Approved with the approved total and the approval number.
3. If the stay runs longer, press Ask for more with the new total, then Approved again when the insurer agrees. An approval never goes down.
4. At discharge press Send final bill with the bill's total; what is above the approval is the patient's share. When the insurer pays, press Settled with what it paid: the rest of the approval shows as disallowed. Press Rejected with the insurer's reason if it refuses.

Tips. A request or query that has waited over a day for the insurer is marked Chase the insurer. The Insurers tab shows what each one approved, was billed, settled and disallowed. Each step keeps who recorded it, when, its amount and note, and settled, rejected and cancelled requests no longer change. Ask StartAI which requests are waiting or how much an insurer disallowed, or tell it an approval came in: it records the step after you confirm. It never reads the diagnosis.

Set-up, help and training

The StartERP team sets up your store, imports your products, customers and opening balances from Excel or CSV, and trains your users on the screens they use.

> **Need an add-on module?** Ask your StartERP contact to switch it on for your store, or write to **sirin@starterp.org** or WhatsApp **+966 50 197 1075**.

The full set of module guides

#	Guide
1	The basics every store has
2	Selling and documents
3	Customers, CRM and loyalty
4	Restaurants and cafés
5	Purchasing and inventory
6	Finance and accounting
7	HR and payroll
8	AI, automation and reports
9	Online, integrations and control
10	Industry modules
11	**Hospitals, clinics, pharmacies and opticians (this guide)**
12	Law firms
13	Hotels and resorts
14	Real estate agencies

All guides can be downloaded in StartERP under Help → User guides.



StartERP

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