HOSSPI
HOSPITAL MANAGEMENT SYSTEM

USER MANUAL

HOSSPI HMS User Manual

Step-by-step guide for hospital staff and administrators

- Registering and signing in
- Finding your way around
- Setting up your facility
- Users, roles and permissions
- Your profile and settings
- Patient registry
- Reception and appointments
- Outpatient care (OPD)

VERSION
1.0

UPDATED
14 September 2026

OPEN THE APP
app.hosspi.com

Contents

Select any entry to go straight to it. Your PDF reader's bookmarks list the same chapters and topics.

CHAPTER 1

Introduction

What HOSSPI HMS is, who this manual is for, and how to read it.

1.1 About HOSSPI HMS

HOSSPI Hospital Management System (HOSSPI HMS) runs the whole facility from one system. Reception, the consulting rooms, the wards, the laboratory, radiology, the pharmacy and the finance office all work from the same patient record, so information entered once is available to everyone who needs it.

You can use HOSSPI HMS in any modern web browser at **app.hosspi.com**, or in the HOSSPI apps for Android, iOS, Windows, macOS and Linux. Your account and your records are the same on every device, and so are the steps in this manual.

1.2 Who this manual is for

This manual is for everyone who uses HOSSPI HMS at a hospital, clinic, laboratory or pharmacy:

- **Facility owners and administrators**, who register the facility, set it up and create staff accounts.
- **Clinical staff** (doctors, nurses, laboratory, radiology and pharmacy teams), who look after patients.
- **Front office and finance staff** (reception, billing officers, cashiers and accountants).
- **Human resources staff and managers**, who keep staff records and read reports.

1.3 How to read this manual

The chapters follow the order in which a facility starts using HOSSPI HMS: registration and sign-in first, then setup and staff accounts, then the patient journey, and finally billing, accounts and reporting. Read the chapters that match your work, or use the contents to go straight to a task.

- **Numbered markers** on a screenshot match the numbered steps beneath it: marker 1 shows where to carry out step 1, and so on.
- Words in **bold** are the exact labels you see on screen, such as buttons, menu items, tabs and field names.
- Fields marked with an asterisk (*) must be completed before a form can be saved.

> **WHAT YOU SEE DEPENDS ON YOUR ROLE**
>
> HOSSPI HMS shows each person only the menu items, tabs and buttons that their role allows, and only the areas included in your facility's subscription package. If something described here is missing from your screen, ask your facility administrator whether your role should include it.

> **SCREENSHOTS USE SAMPLE DATA**
>
> The screenshots were taken in a demonstration workspace, DemoCare General Hospital. The names, patients and amounts in them are examples, not real people.

1.4 What you need

- A computer, tablet or phone with an up-to-date web browser (Chrome, Edge, Firefox or Safari), or the HOSSPI app installed.
- An internet connection.
- The email address or phone number of your account, and your password. Staff accounts are created by the facility administrator.

CHAPTER 2

Registering and signing in

Create your facility’s account, verify your email address, wait for approval and sign in. Also covers resetting a forgotten password.

2.1 How registration works

A facility joins HOSSPI HMS in four stages. Only the first administrator registers. Everyone else gets an account from an administrator later, as described in Users, roles and permissions.

Stage	What happens	Who does it
1. Create your account	Enter the administrator and facility details on the registration form.	Facility administrator
2. Verify your email	Enter the six-digit code sent to your email address.	Facility administrator
3. Wait for approval	The HOSSPI platform team reviews and approves the new facility.	HOSSPI
4. Sign in	Sign in with the email address or phone number and password you registered.	Facility administrator

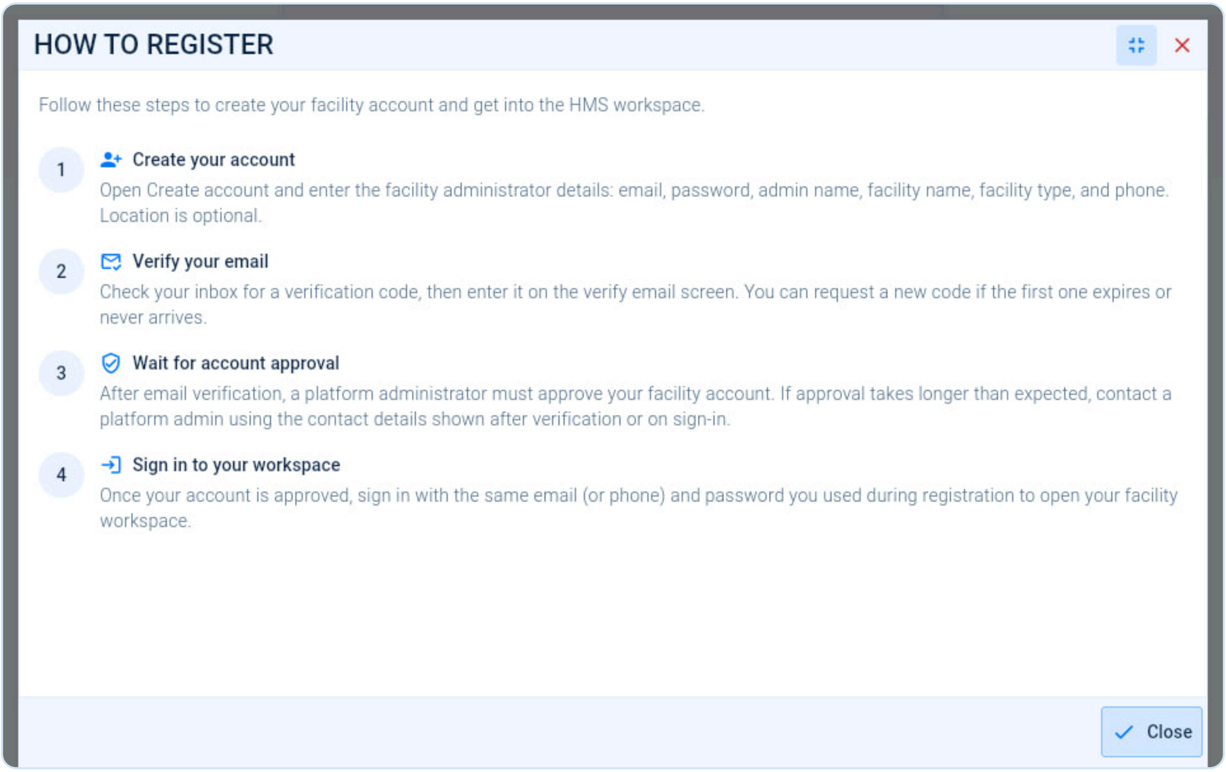

Figure 2.1. The same four stages are summarised under How to register on the sign-in and registration screens.

2.2 Register your facility

Who: The person who will administer the facility

Go to **app.hosspi.com**. On the sign-in screen, select **Register** to open **Set up your facility**.

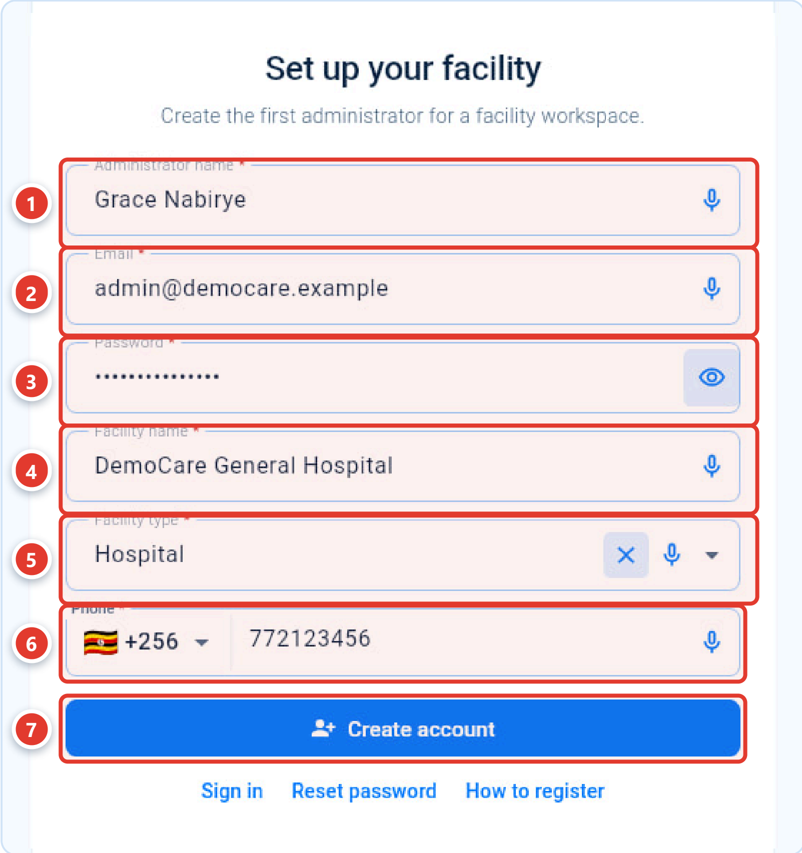

Figure 2.2. Set up your facility: the registration form.

1. Enter your full name in **Administrator name**. You become the first administrator of the facility.
2. Enter the email address you will sign in with in **Email**. The verification code is sent here, so use an inbox you can open now.
3. Choose a **Password** of at least 8 characters. Select the eye icon to show or hide what you typed.
4. Enter the name of your hospital, clinic, laboratory or pharmacy in **Facility name**.
5. Choose the **Facility type**: **Hospital**, **Clinic**, **Lab**, **Pharmacy** or **Other**.
6. In **Phone**, choose your country and enter the phone number. You can also sign in with this number later.
7. Select **Create account**.

HOSSPI HMS creates your facility's workspace and opens **Verify your email**.

> **IF THE FORM IS NOT ACCEPTED**
>
> Any field with a problem is highlighted with an explanation beneath it. Other problems, such as an email address that is already registered, are explained in a message above the form. If you already have an account, select **Sign in** or **Reset password** instead.

2.3 Verify your email address

Look in the inbox of the email address you registered for a message with a six-digit verification code. If it has not arrived after a few minutes, check your spam or junk folder.

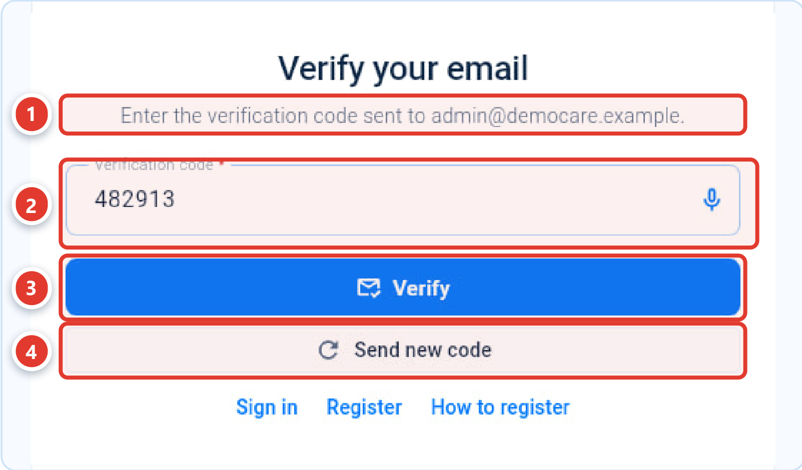

Figure 2.3. Verify your email: enter the six-digit code from your inbox.

1. Check that the email address in the message at the top is the one you registered.
2. Type the six-digit code into **Verification code**.
3. Select **Verify**.
4. If the code has expired or never arrived, select **Send new code**, then enter the newest code.

> **NOTE**
>
> If the screen shows **Account created** with a warning that the verification email has not gone out yet, your workspace has still been created. Select **Send new code** to receive your code.

2.4 Wait for approval

Once your email address is verified, the HOSSPI platform team checks the new facility before anyone can sign in. HOSSPI HMS returns you to the sign-in screen and explains that your account is **Awaiting approval**.

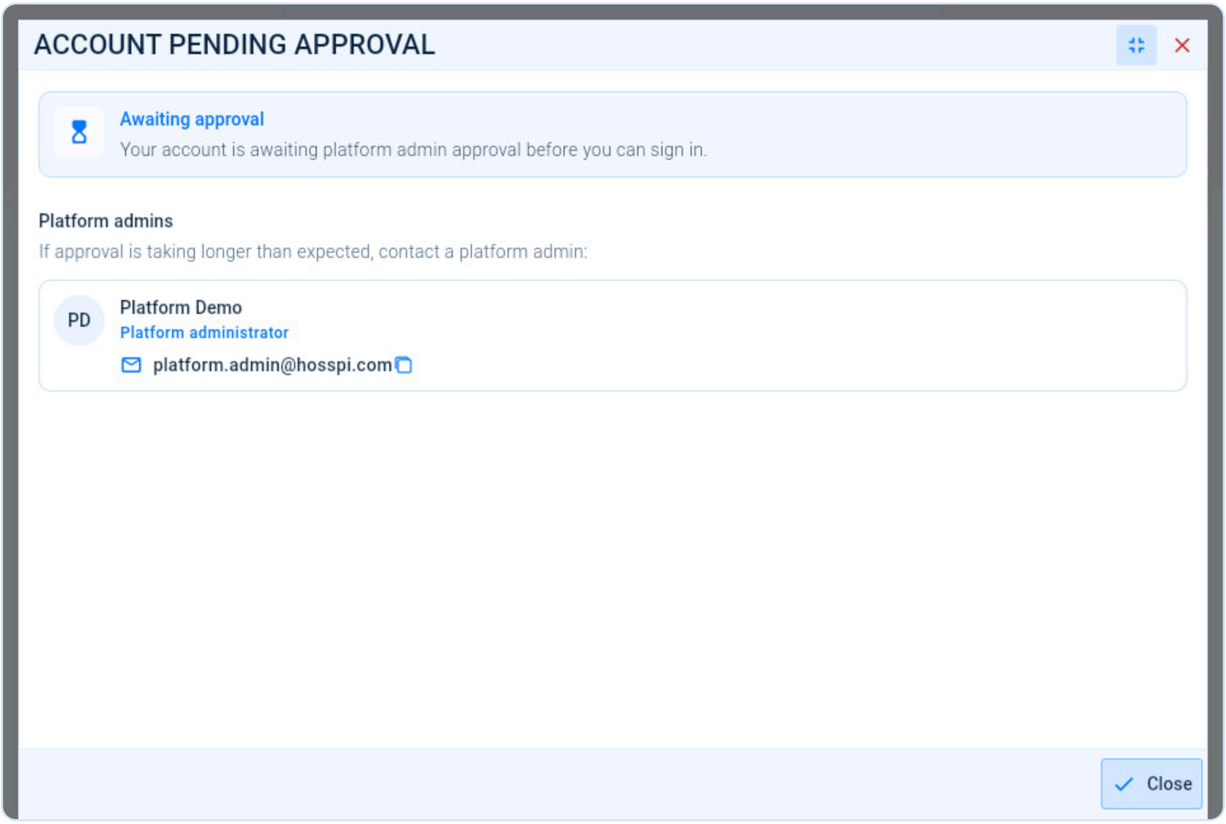

Figure 2.4. Awaiting approval, with the platform administrators you can contact.

The message lists the platform administrators you can contact if approval takes longer than expected. Select an email address or phone number to copy it, then select **Close**. If you try to sign in before your account is approved, the same information appears under **Account pending approval**.

2.5 Sign in

Who: Everyone

Go to **app.hosspi.com**. The sign-in screen, **Welcome back**, opens.

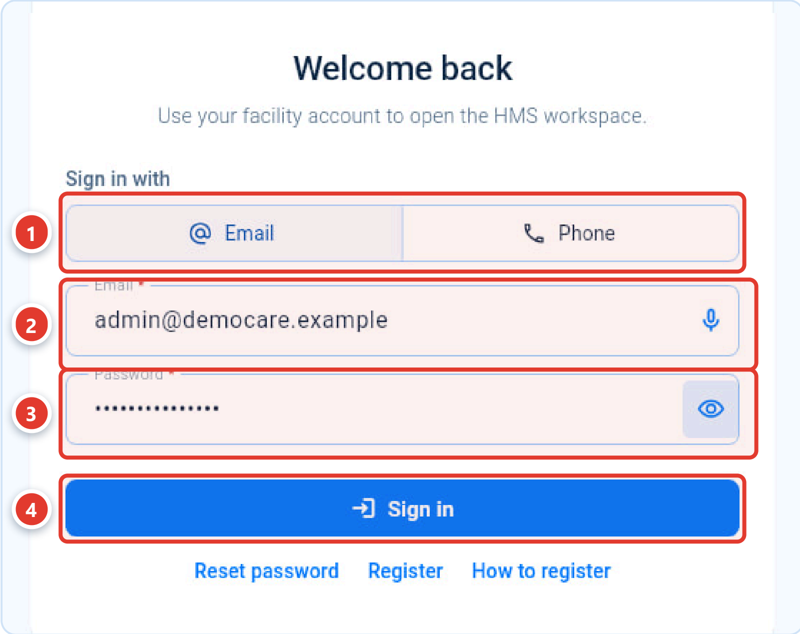

Figure 2.5. Welcome back: the sign-in screen.

1. Under **Sign in with**, choose **Email** or **Phone**.
2. Enter the email address, or choose the country and enter the phone number, of your account.
3. Enter your **Password**.
4. Select **Sign in**.

HOSSPI HMS opens your **Dashboard**, or the page you were trying to open when you were asked to sign in.

If you see	What to do
The sign-in details are not valid. or **The password is incorrect for this account.**	Check the email address or phone number and the password, including capital letters, and try again.
No account for that email or phone.	Check for typing mistakes. If you are a member of staff, ask your facility administrator to create your account.
Too many attempts.	Wait until the time shown, then try again.
Verify your email	The account has not been verified yet. Enter the code sent to your email address.
Account pending approval	The facility is still waiting for HOSSPI approval. Contact one of the platform administrators listed.
This facility account has been deactivated.	Contact the platform administrator shown in the message.

2.6 Reset a forgotten password

Who: Everyone

On the sign-in screen, select **Reset password**. The **Reset your password** screen opens.

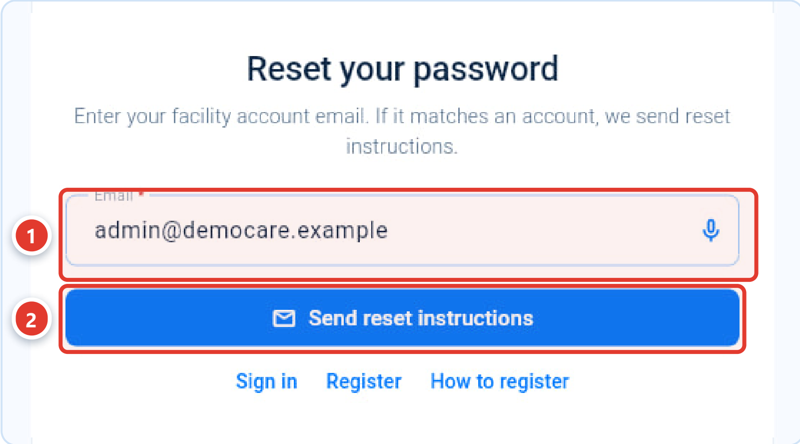

Figure 2.6. Reset your password: request a reset code.

1. Enter the **Email** address of your account.
2. Select **Send reset instructions**. If the address belongs to accounts in more than one workspace, choose the workspace you want to reset.

HOSSPI HMS sends a reset link and a six-digit code to your email address and opens **Choose a new password**.

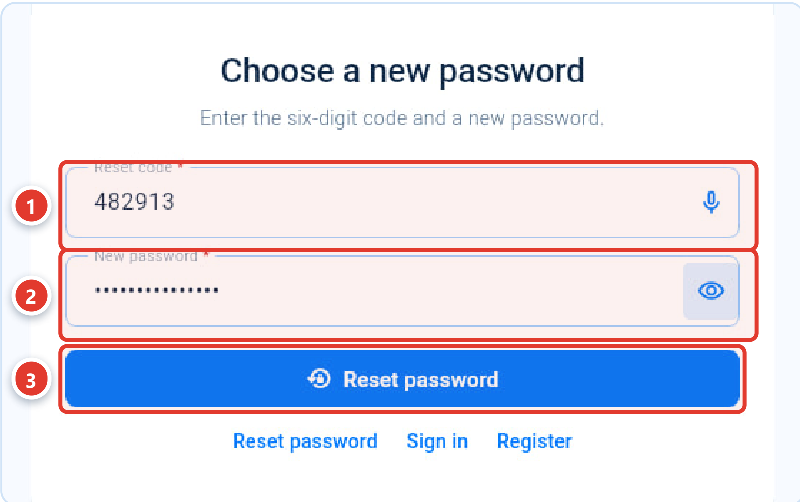

Figure 2.7. Choose a new password: enter the reset code and your new password.

1. Enter the six-digit **Reset code** from the email.
2. Enter a **New password** of at least 8 characters.
3. Select **Reset password**.

The sign-in screen opens with the message **Password updated**. Sign in with your new password. You can also open the link in the email instead of typing the code; it takes you straight to **Choose a new password**.

CHAPTER 3

Finding your way around

The parts of the screen you use every day: the menu, the top bar, your dashboard, your account menu and the tools on every list.

3.1 The workspace at a glance

Who: Everyone

After you sign in, HOSSPI HMS opens your **Dashboard**. Every screen shares the same frame: the menu on the left, the top bar across the top, and the screen you are working on in the middle.

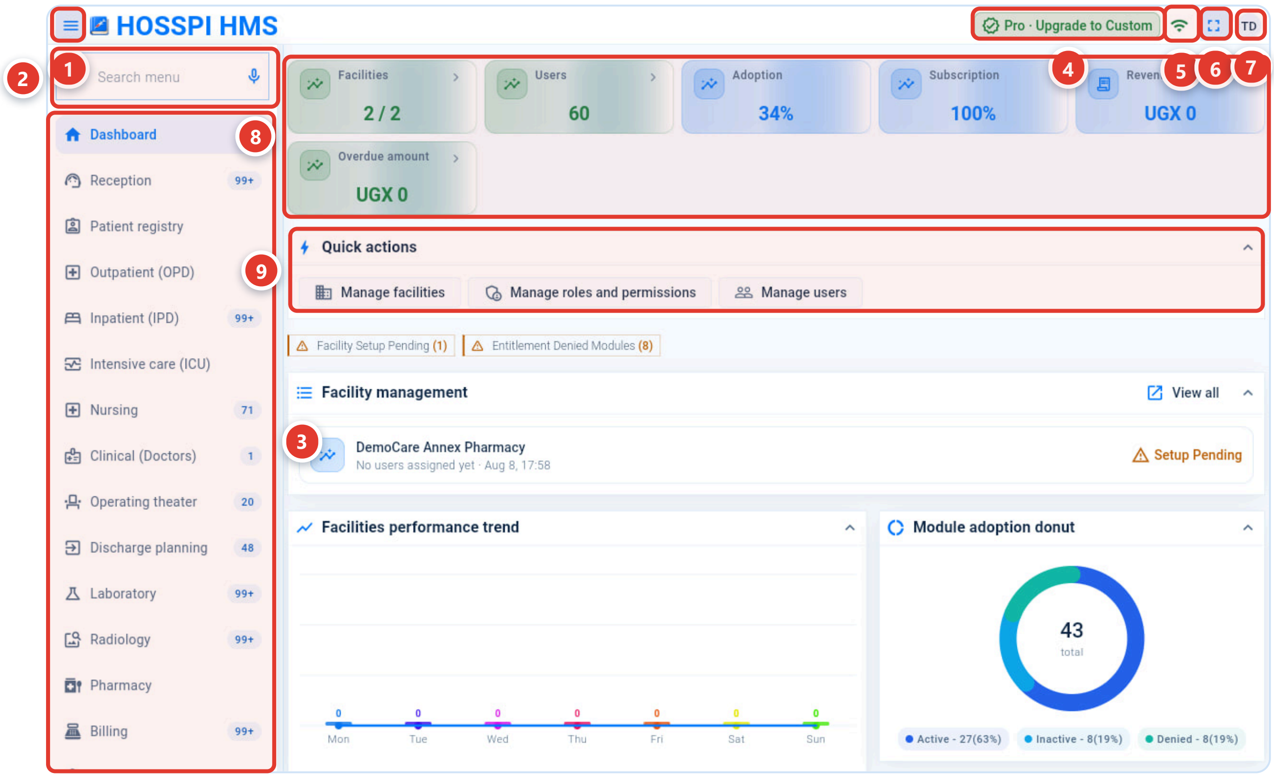

Figure 3.1. The workspace, showing the Dashboard of a hospital administrator.

1. **Toggle sidebar** hides or shows the menu to give the page more room.
2. **Search menu** finds any menu item by name. See Find a screen with Search menu.
3. The menu lists the areas your role can open, grouped by type of work. A number beside an item shows how many records are waiting there; **99+** means more than 99.
4. The subscription badge shows your facility's package, for example **Pro**. Administrators select it to renew or change the package. See Renew or change your subscription.
5. The connection indicator shows whether HOSSPI HMS is **Online** or **Offline**.
6. **Full screen** hides the browser's toolbars. Select it again to leave full screen.
7. **Account**, shown as your initials, opens your account menu. See Your account menu.

8. Summary cards show the figures that matter to your role. Select a card that has an arrow to open the records behind it.
9. **Quick actions** are shortcuts to the tasks you carry out most often.

> **YOUR DASHBOARD MATCHES YOUR ROLE**
> The layout is the same for everyone, but the cards, quick actions, alerts and charts change with your role. An administrator sees facilities, users and revenue, while a receptionist's dashboard focuses on the front desk and a pharmacist's on dispensing. Select an alert, such as **Facility Setup Pending**, to go straight to the records it refers to.

3.2 Find a screen with Search menu

Who: Everyone

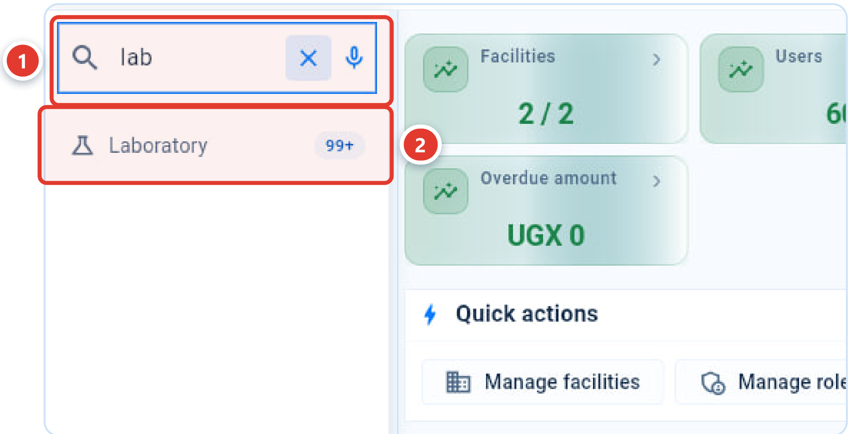

Figure 3.2. Search menu narrows the menu as you type.

1. Select **Search menu** at the top of the menu and type part of the screen's name, for example **lab**.
2. Select the matching item. If nothing matches, the menu shows **No menu items found**. Check the spelling, or ask your administrator whether your role includes that screen.

> **DICTATE INSTEAD OF TYPING**
> The microphone icon in search boxes and text fields lets you speak instead of typing, where your device and browser allow microphone access.

3.3 Your account menu

Who: Everyone

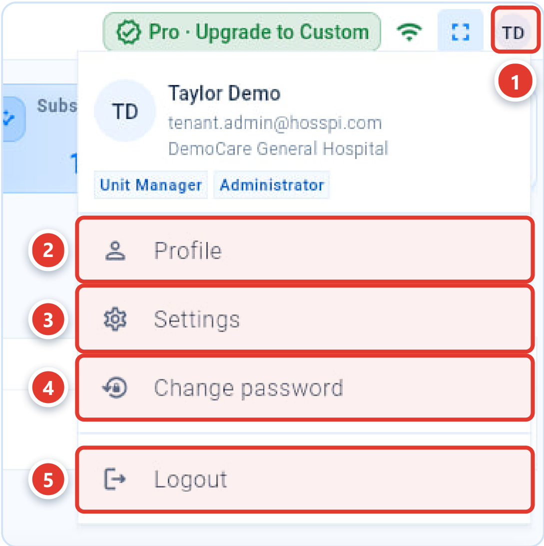

Figure 3.3. The account menu shows who is signed in and where.

1. Select your initials at the top right of the screen. The menu shows your name, email address, facility and roles.
2. **Profile** opens your profile. See Your profile and settings.
3. **Settings** opens your personal settings, such as the theme and accessibility options.
4. **Change password** opens the form for choosing a new password.
5. **Logout** signs you out of HOSSPI HMS.

> **SIGN OUT OF SHARED COMPUTERS**
>
> Your session stays open until you sign out. Always select **Logout** before you leave a shared or public computer.

3.4 Working with lists

Who: Everyone

Most screens show records as a list, such as patients, invoices, staff or departments. Every list has the same tools, so once you know one list you know them all.

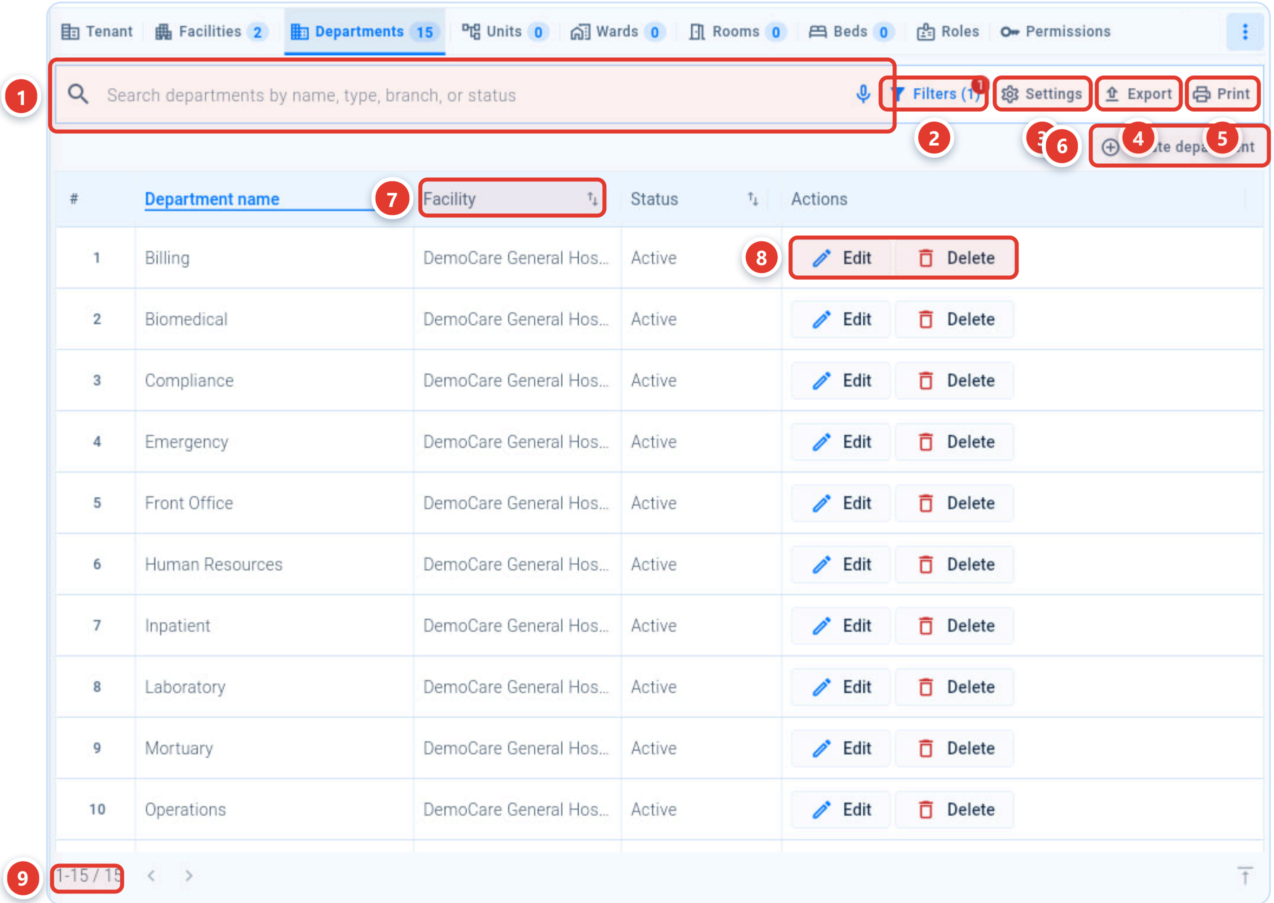

Figure 3.4. The tools on a list, shown on the Departments tab of Tenant setup.

1. Type in the search box to show only matching records. The hint in the box tells you what you can search by.
2. **Filters** narrows the list, for example by date, facility or status. Choose the values, then select **Apply filters**; **Clear filters** removes them. A number beside **Filters** shows how many filters are in use.
3. **Settings** chooses the columns the list shows. Tick the columns you want and select **Apply columns**, or select **Reset columns** to return to the standard set.
4. **Export** saves the list as a file. Choose the columns and filters to include, then select **Export**.
5. **Print** prepares the list for printing.
6. The create button adds a new record to the list, here **Create department**.
7. Select a column heading to sort by that column, and select it again to reverse the order. Drag the edge of a heading to widen or narrow the column.
8. Row actions work on a single record, for example **Edit** and **Delete**. On some lists you select the row itself to open the record.
9. The count shows which records are on screen and how many there are in total. Scroll down or use the page arrows to see more, and select **Go to top** to return to the start.

CHAPTER 4

Setting up your facility

Describe your organisation to HOSSPI HMS: its details, facilities, departments, wards, rooms and beds, the clinical services you offer, your default fees, and your subscription.

4.1 Open Tenant setup

Who: Administrators

HOSSPI HMS calls your organisation the **tenant**. A tenant can run several **facilities**, such as a hospital and a pharmacy, and each facility is organised into departments, units, wards, rooms and beds.

Select **Tenant setup** at the bottom of the menu. Facility administrators see **Facility setup** instead, which covers their own facility.

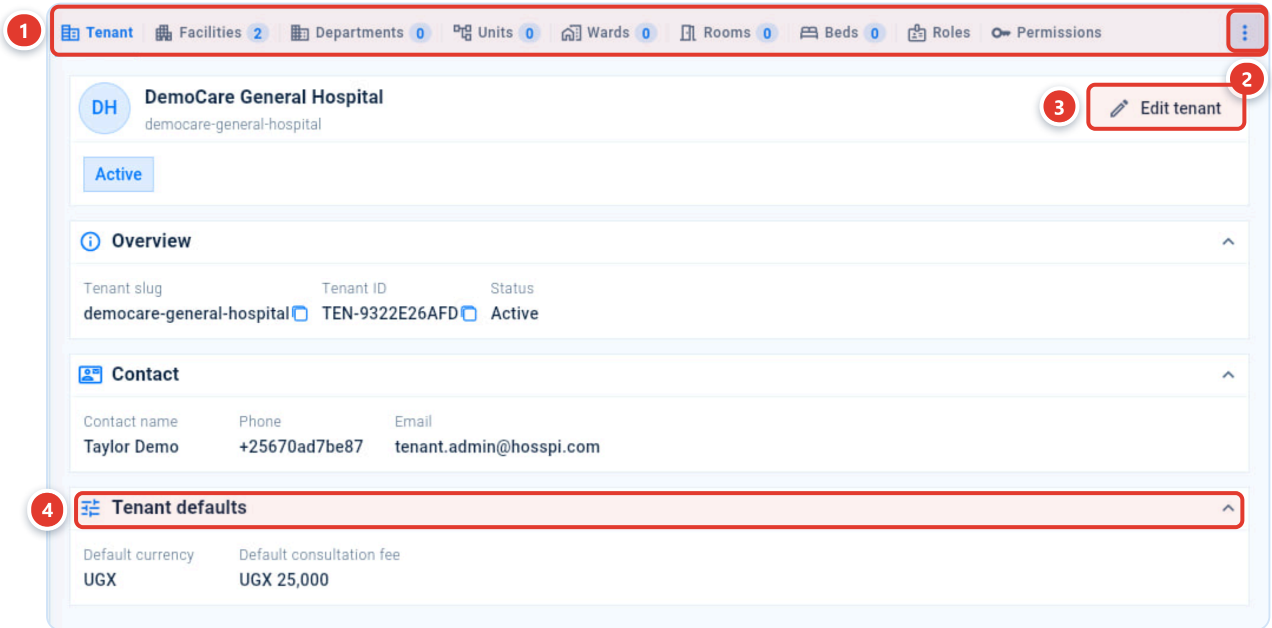

Figure 4.1. Tenant setup, open on the Tenant tab.

1. The tabs cover each part of your organisation, such as **Tenant**, **Facilities**, **Departments**, **Units**, **Wards**, **Rooms**, **Beds** and **Clinical Services**. The number on a tab shows how many records it holds.
2. **More tabs** lists the tabs that do not fit on the screen, such as **Users**, **Roles** and **Permissions**.
3. **Edit tenant** changes your organisation's details. See Update your organisation's details.
4. **Tenant defaults** shows the currency and consultation fee used when a facility does not set its own.

> **SET UP FROM THE TOP DOWN**
>
> Add records in order: facilities first, then departments and units, then wards, rooms and beds. Each record is linked to the one above it, so a ward needs its facility, and a bed needs its ward.

4.2 Update your organisation's details

Who: Tenant administrators

On the **Tenant** tab, select **Edit tenant**.

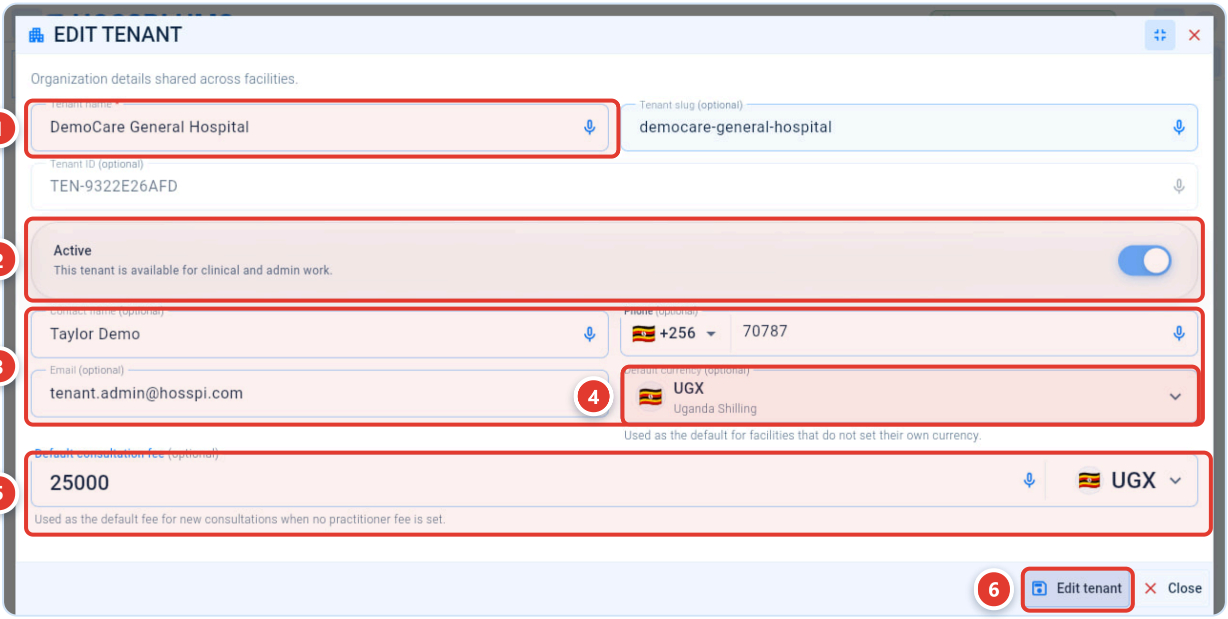

Figure 4.2. Edit tenant: your organisation's details and defaults.

1. Check the **Tenant name**, the name of your organisation as it appears throughout HOSSPI HMS.
2. Keep **Active** switched on. Staff can only work in an active organisation.
3. Enter the **Contact name**, **Phone** and **Email** of the person to contact about the organisation.
4. Choose the **Default currency** for prices and amounts at facilities that do not set their own.
5. Enter the **Default consultation fee**, charged for new consultations when no practitioner fee is set.
6. Select **Edit tenant** to save your changes.

> **TIP**
>
> **Tenant slug** is an optional short name for your organisation. **Tenant ID** is assigned by HOSSPI HMS and cannot be changed.

4.3 Add or edit a facility

Who: Tenant administrators

Select the **Facilities** tab, then **Create facility**. To change a facility that already exists, select **Edit** on its row instead.

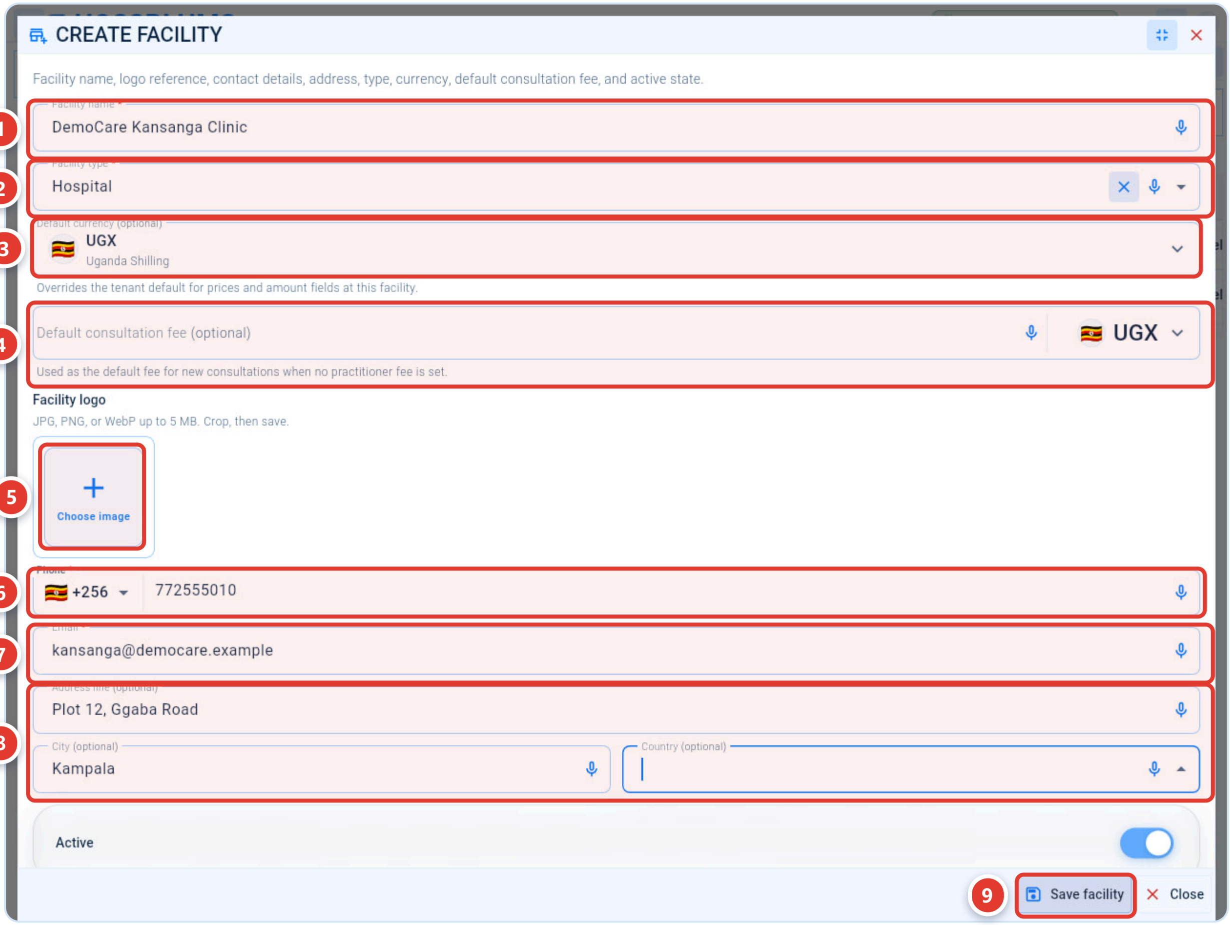

Figure 4.3. Create facility, completed with sample details.

1. Enter the **Facility name**.
2. Choose the **Facility type**.
3. Choose a **Default currency** if this facility prices services in a different currency from the tenant default.
4. Enter a **Default consultation fee** if this facility charges a different fee from the tenant default.
5. Select **Choose image** to add the facility's logo: a JPG, PNG or WebP image of up to 5 MB. Crop it, then save.
6. Enter the facility's **Phone** number.
7. Enter the facility's **Email** address.
8. Add the **Address line**, **City** and **Country** if you wish.
9. Select **Save facility**.

> **DELETING A FACILITY**
>
> Selecting **Delete** on a facility's row affects everyone who works there. Agree the change with your team before you delete a facility.

4.4 Add departments and units

Who: Administrators

Departments group your services, for example Outpatient, Laboratory or Pharmacy. Units are the teams inside a department. Select the **Departments** tab, then **Create department**.

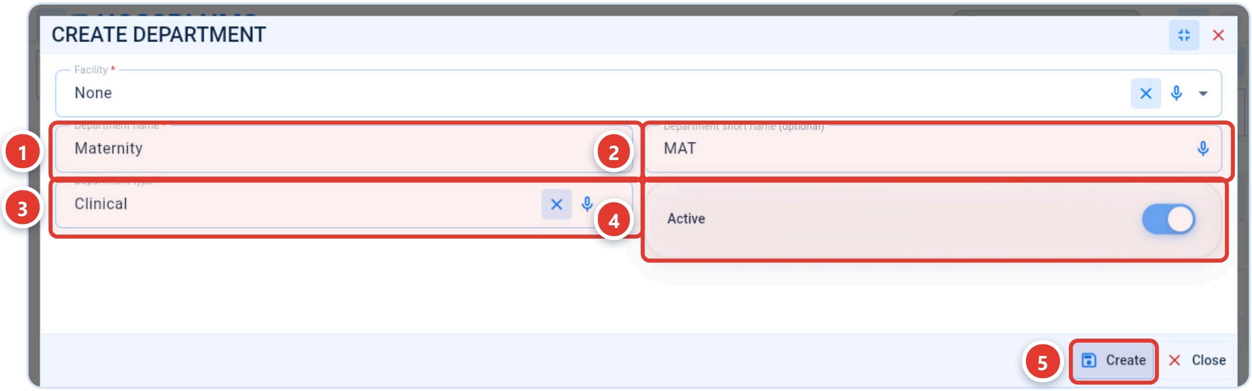

Figure 4.4. Create department.

1. Enter the **Department name**.
2. Enter a **Department short name** if you want an abbreviation for places where space is limited.
3. Choose the **Department type**.
4. Keep **Active** switched on so the department can be used.
5. Select **Create**.

To add a unit, select the **Units** tab, then **Create unit**. Complete the form, enter the **Unit name**, keep **Active** switched on and select **Create**.

4.5 Add wards, rooms and beds

Who: Administrators

Wards, rooms and beds describe where patients stay. Admission and ward screens allocate patients to these beds, so set them up before you admit patients. Select the **Wards** tab, then **Create ward**.

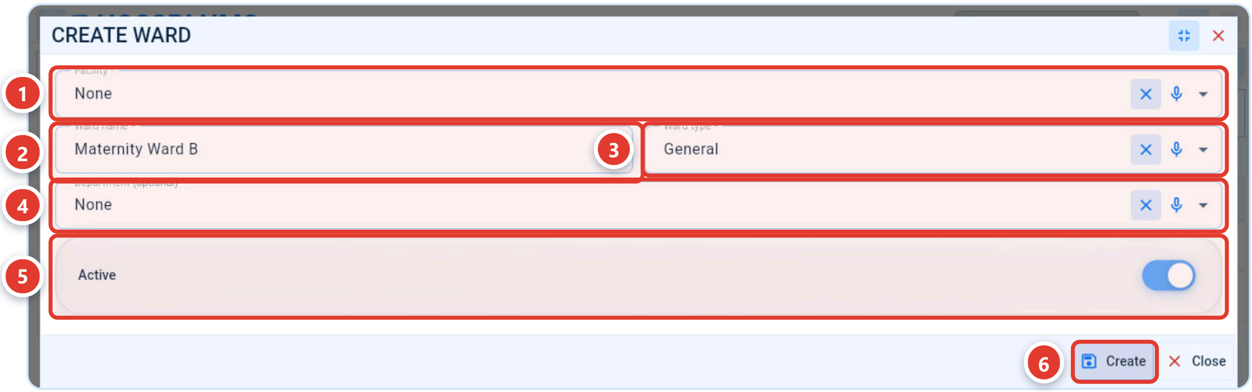

Figure 4.5. Create ward.

1. Choose the **Facility** the ward belongs to.
2. Enter the **Ward name**.

3 Choose the **Ward type**, for example **General**, **ICU**, **Maternity**, **Pediatric** or **Surgical**.

4 Choose the **Department** that runs the ward, if you wish.

5 Keep **Active** switched on.

6 Select **Create**.

To add a room, select the **Rooms** tab, then **Create room**. Choose the **Facility** and enter the **Room name**. Choose the **Ward** the room is on, or leave it unassigned for an outpatient or department consulting room. Add the **Floor** if you wish, then select **Create**.

To add a bed, select the **Beds** tab, then **Create bed**.

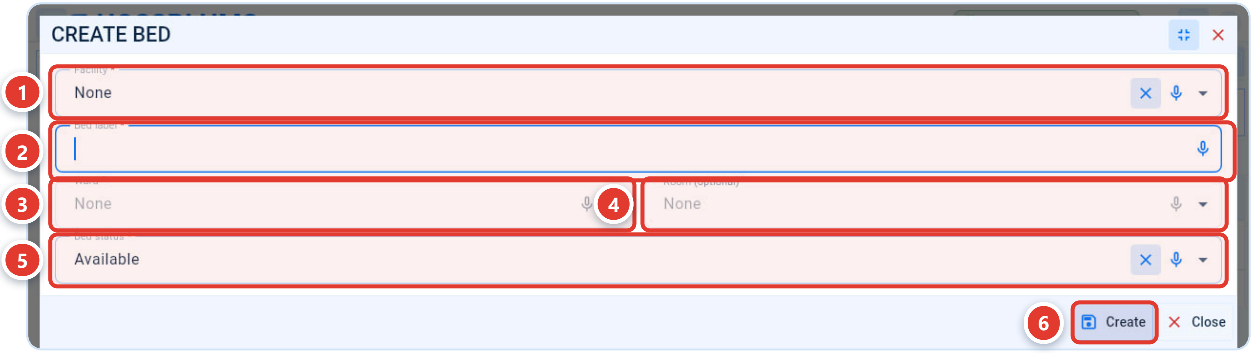

Figure 4.6. Create bed.

1 Choose the **Facility**.

2 Enter the **Bed label** shown on the ward, for example **B12**.

3 Choose the **Ward** the bed is on.

4 Choose the **Room**, if the bed is in one.

5 Choose the **Bed status**. New beds are usually **Available**.

6 Select **Create**.

Bed status	Meaning
Available	Ready for a patient.
Occupied	A patient is using the bed.
Reserved	Held for a patient who is expected.
Cleaning	Being cleaned before the next patient.
Maintenance	Out of use while it is repaired.
Blocked	Not to be used.

4.6 Choose the clinical services you offer

Who: Administrators

The **Clinical Services** tab holds the catalogues that clinicians choose from when they order investigations or record a diagnosis. HOSSPI HMS comes with ready-made catalogues; you decide which items your facility offers. Open **More tabs** if **Clinical Services** is not visible.

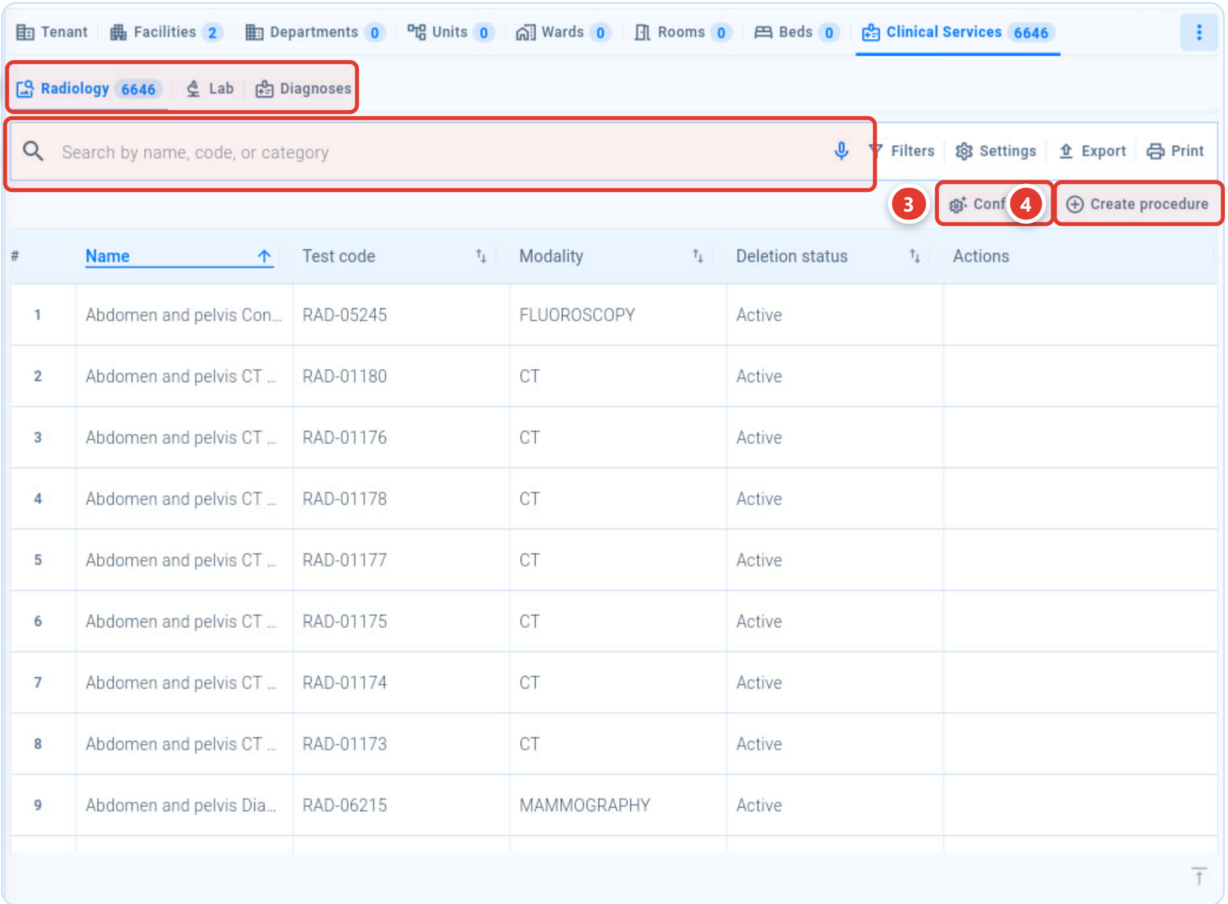

Figure 4.7. Clinical Services, showing the radiology catalogue.

1. Choose a catalogue: **Radiology**, **Lab** or **Diagnoses**.
2. Search the catalogue by name, code or category.
3. **Configure** lists the catalogue so you can choose the items this facility offers. Tick the items and select **Next**, enter a **Unit price** for each item you chose, then select **Next** again to finish.
4. **Create procedure** adds an item that is not in the catalogue. Enter its **Name**, an optional **Test code** and the **Modality**, then select **Save**. On the other catalogues this button is named after the kind of item it adds.

4.7 Set default consultation fees and currency

Who: Administrators

Open **Settings** and select the **Configuration** tab.

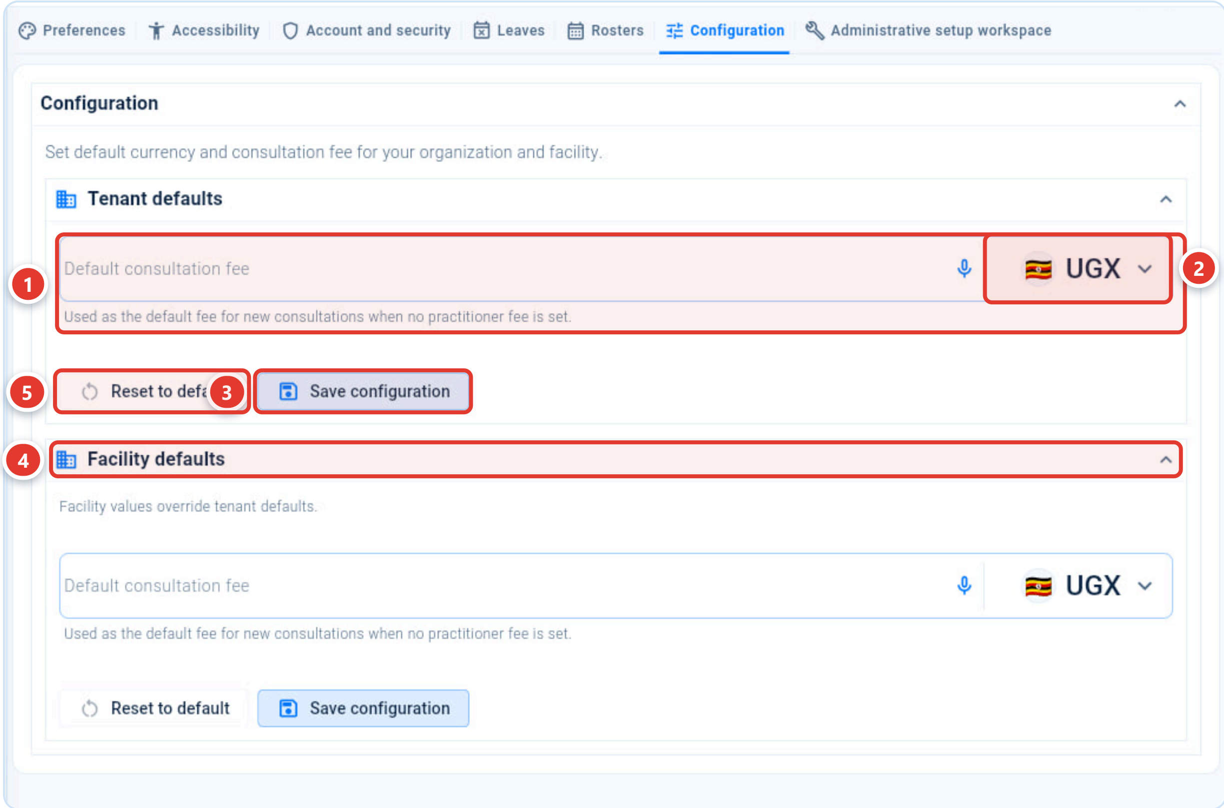

Figure 4.8. Settings, Configuration tab.

1. Under **Tenant defaults**, enter the **Default consultation fee** for the whole organisation.
2. Choose the currency beside the fee.
3. Select **Save configuration**.
4. Under **Facility defaults**, set a different fee or currency for the current facility if it charges differently, then select its **Save configuration**. Facility values override the tenant defaults.
5. **Reset to default** clears the saved values in that section, after you confirm. Once a facility's values are cleared, the tenant defaults apply to it again.

> **NOTE**
> The default consultation fee is used for new consultations when the practitioner has no fee of their own.

4.8 Renew or change your subscription

Who: Administrators

Your subscription package decides which areas of HOSSPI HMS your facility can use, and how many users and facilities it can have. Select the package badge at the top of the screen, for example **Pro**, to open the subscription window.

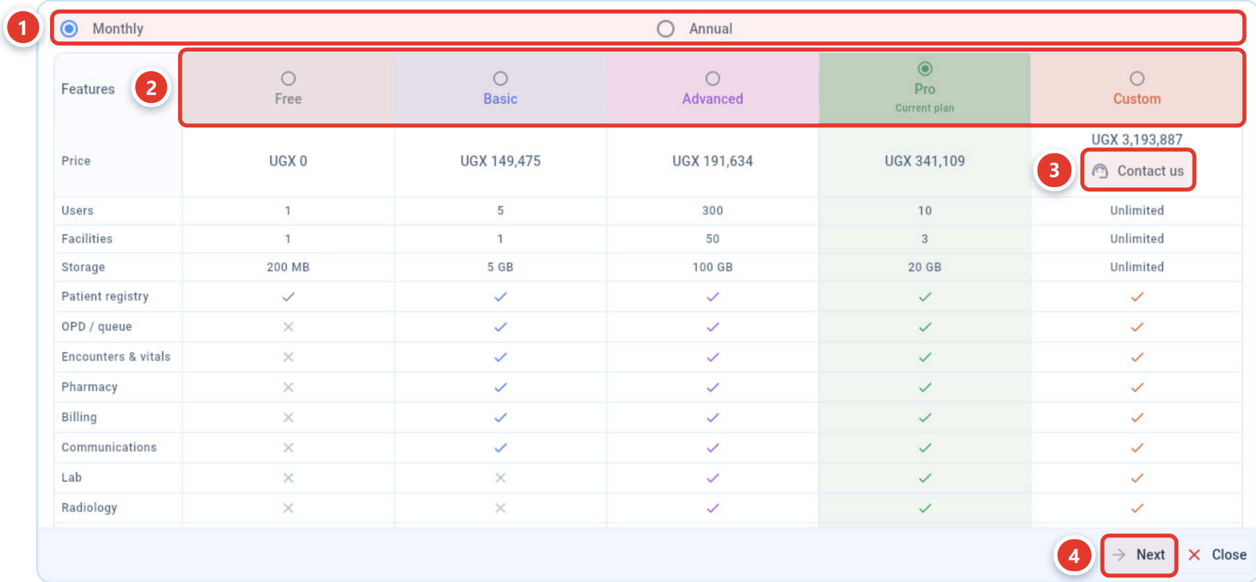

Figure 4.9. Comparing packages in the subscription window.

1. Choose **Monthly** or **Annual** billing.
2. Compare the **Free**, **Basic**, **Advanced**, **Pro** and **Custom** packages by price, users, facilities, storage and the areas each one includes, then select the package you want. Your present package is marked **Current plan**.
3. For **Custom**, select **Contact us** to agree pricing and contents with the HOSSPI team.
4. Select **Next** and follow the steps: choose how you will pay, make the payment using the details shown, then send the payment reference and, if you have it, proof of payment.

The HOSSPI team checks the payment and activates the package. Until then, the window shows **Activation request in progress** and package changes are locked. Select **Cancel request** if you need to choose a different package. If a request is rejected, the window gives the reason, and you can select **Contact admins**.

> **NOTE**
>
> Moving to the **Free** package needs no payment. Confirm the change and the HOSSPI team applies it.

CHAPTER 5

Users, roles and permissions

Give every member of staff their own account, control what they can open and do through roles, and keep access up to date as people join, change jobs and leave.

5.1 How access works

Who: Administrators

Every member of staff signs in with their own account. What each person can open and do is decided by three things together:

- **Your subscription package** sets which areas of HOSSPI HMS your organisation can use at all.
- **Roles** bundle the permissions a job needs, such as **Receptionist**, **Nurse** or **Accountant**. HOSSPI HMS comes with ready-made roles, and you can create your own.
- **Direct permissions** give one extra permission to one person, for exceptions.

Everything a person's roles and direct permissions allow, within your package, makes up their **effective permissions**.

> **GIVE PEOPLE THE ACCESS THEIR JOB NEEDS**
>
> Assign the role that matches each job and keep direct permissions for rare exceptions. Review a person's access whenever they change jobs or leave.

5.2 Open access administration

Who: Administrators

On your **Dashboard**, select **Manage users** or **Manage roles and permissions** under **Quick actions**. The same lists are also on the **Users** and **Roles** tabs of **Tenant setup**.

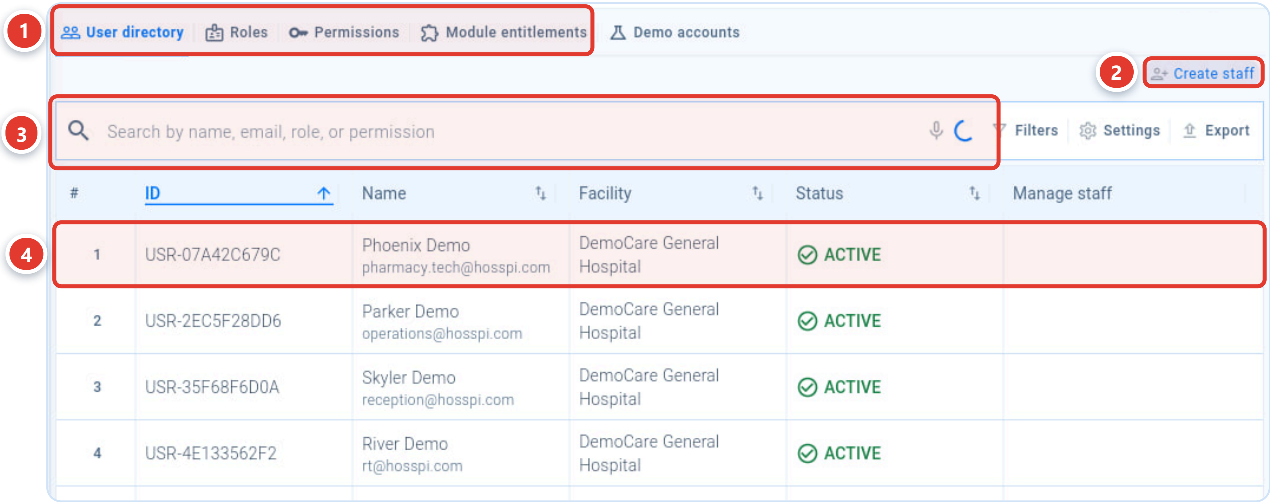

Figure 5.1. Access administration, User directory tab.

1. The tabs: **User directory** lists staff accounts, **Roles** lists roles, **Permissions** describes every permission, and **Module entitlements** shows the areas your package includes.
2. **Create staff** adds a staff account. See Create a staff account.
3. Search by name, email address, role or permission.
4. Select a staff member's row to open their record.

5.3 Create a staff account

Who: Administrators

On the **User directory** tab, select **Create staff**.

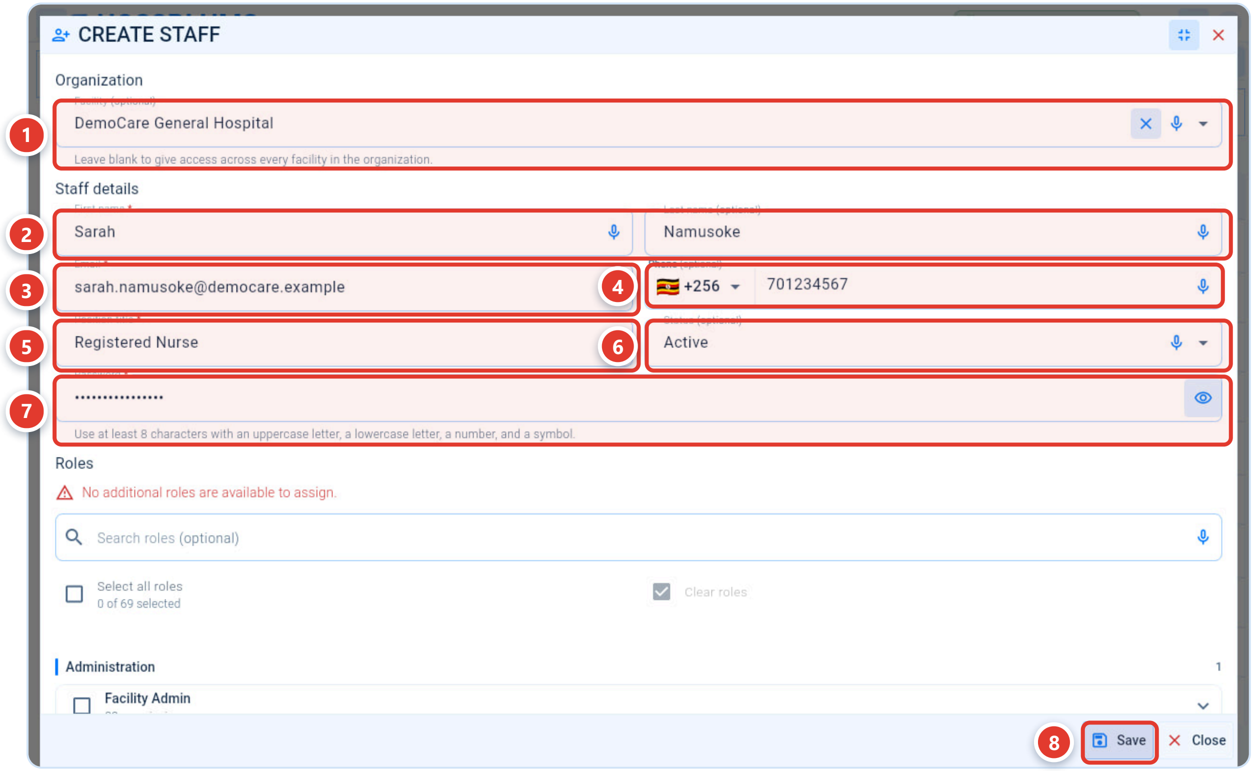

Figure 5.2. Create staff, completed with sample details.

1. Choose the **Facility** the person works at. Leave it blank to give them access across every facility in the organisation.
2. Enter their **First name** and, if you wish, their **Last name**.
3. Enter their **Email** address. They sign in with it.
4. Enter their **Phone** number if you wish. They can sign in with it too.
5. Enter their **Position title**, for example Registered Nurse.
6. Leave **Status** as **Active** so they can sign in.
7. Set a starting **Password** of at least 8 characters, with an upper-case letter, a lower-case letter, a number and a symbol.
8. When you have chosen the person's roles, as described below, select **Save**.

Scroll down to **Roles** in the same form.

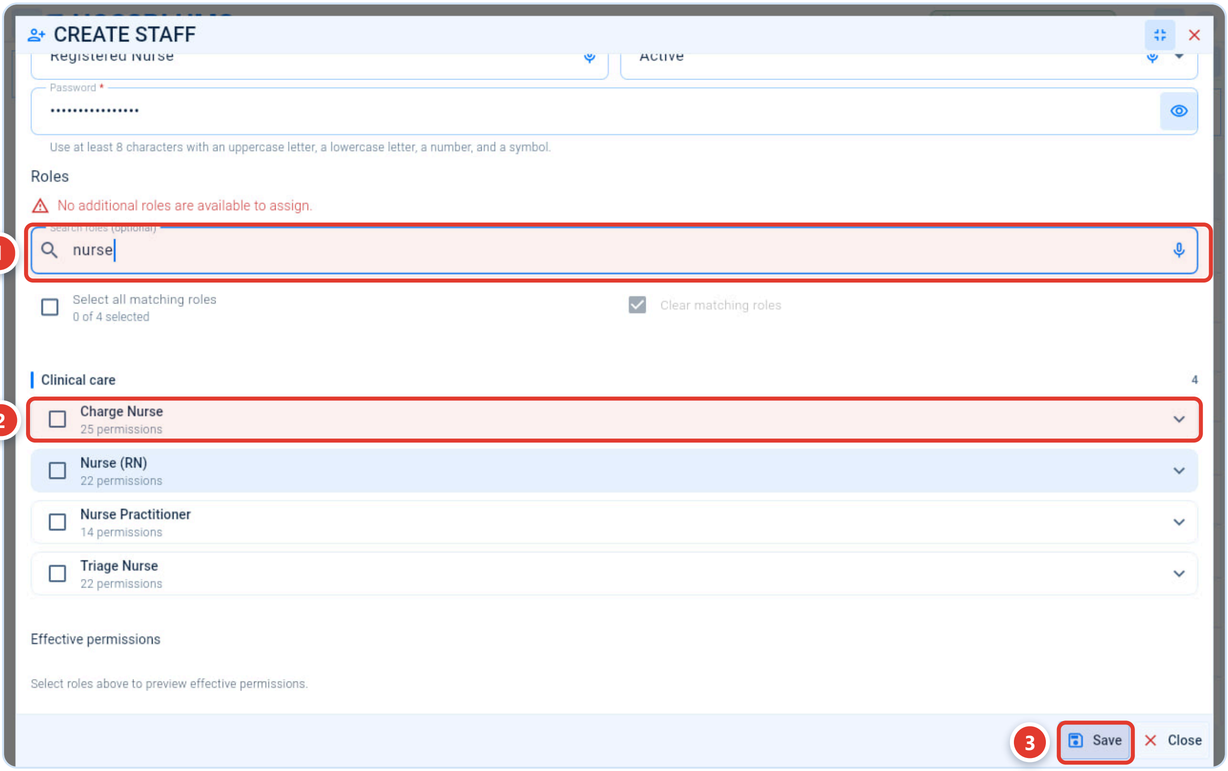

Figure 5.3. Choosing roles for a new staff account.

1. Type part of a role's name in **Search roles**, for example nurse. Roles are grouped by area, such as **Administration** and **Clinical care**.
2. Tick each role the person needs. The figure under each role is the number of permissions it grants, and **Effective permissions** below previews everything the chosen roles allow together.
3. Select **Save**.

> **SHARE THE STARTING PASSWORD SAFELY**
>
> Give the starting password to the person privately, never in a group message, and ask them to change it after they first sign in. See Change your password.

5.4 Review and change a staff account

Who: Administrators

Select a staff member in the **User directory** to open their record.

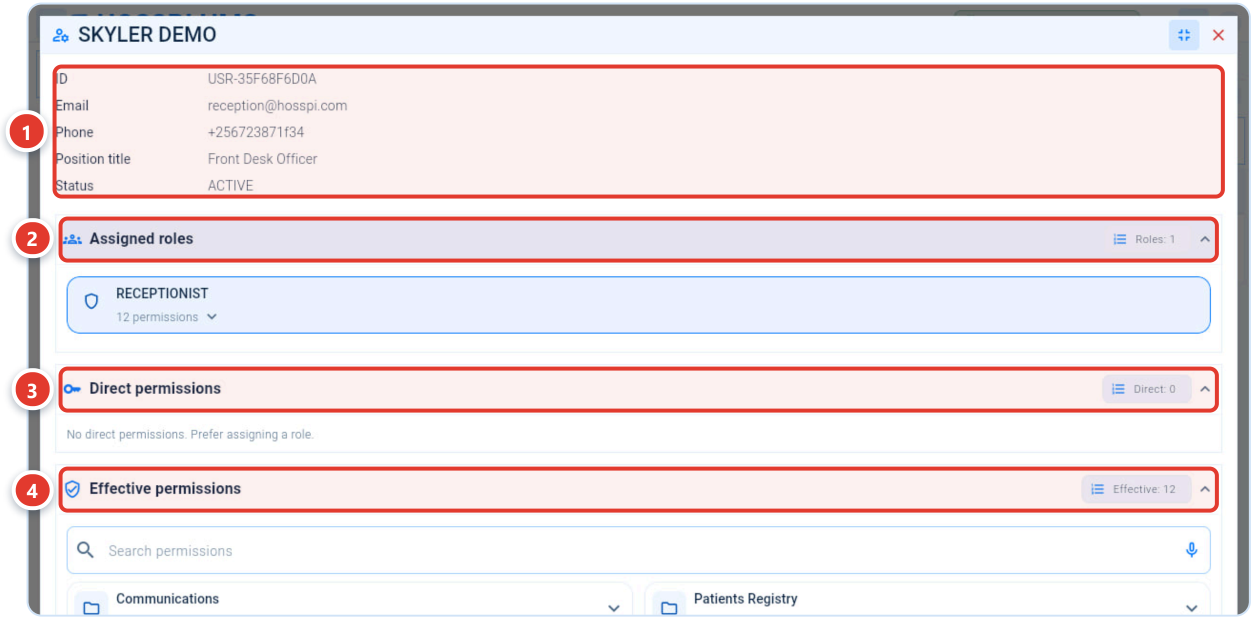

Figure 5.4. A staff record.

1. The account details: ID, email address, phone, position title and status.
2. **Assigned roles** lists the person's roles and how many permissions each one grants. Select **Add role** to assign another role, or remove a role to take away its permissions.
3. **Direct permissions** lists permissions given to this person alone. Select **Add permission** only for a one-off exception.
4. **Effective permissions** shows everything the person can do, grouped by area. Search it to check whether they have a particular permission.

Depending on the account, these actions are also available:

Action	What it does
Edit staff	Change the person's name, contact details, position title or status.
Deactivate staff	Stop the person signing in, for example when they leave. **Activate staff** gives access back.
Send password reset email	Email the person a single-use link to choose a new password. Their current password keeps working until they use the link, and all their signed-in sessions end when they do.
Delete staff	Remove an account created by mistake. Deactivate staff who leave instead.
Open HR profile	Open the person's staff profile in Human resources.

> **NOTE**
>
> Protected accounts that the organisation depends on cannot be deleted.

5.5 Create a custom role

Who: Administrators

Create a role when none of the ready-made roles fits a job. Select the **Roles** tab.

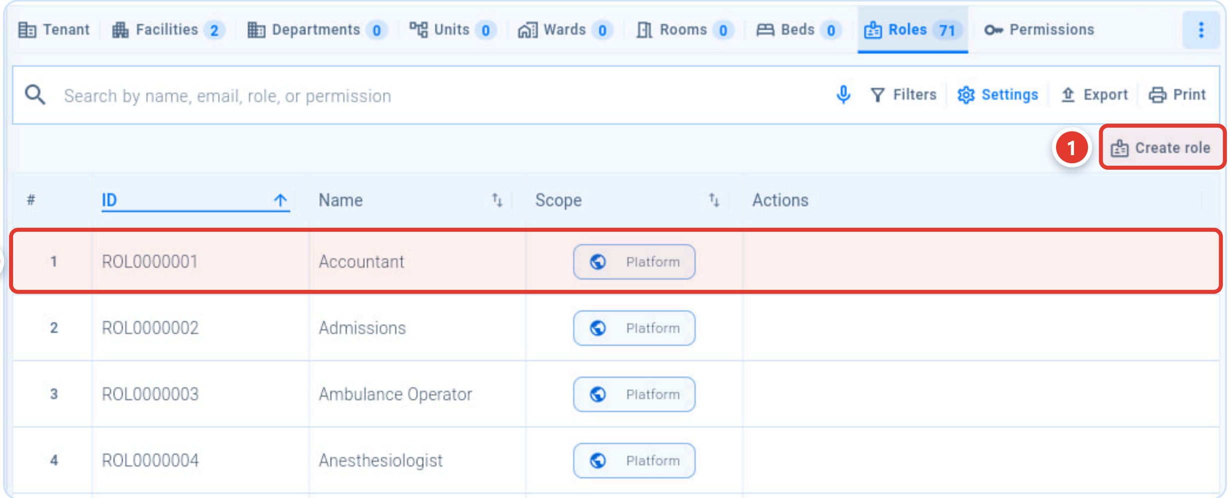

Figure 5.5. The Roles tab.

1. Select **Create role** to start a new role.
2. Select a role to see the permissions it grants and the staff who have it. Select **Edit permissions** to change what it grants.

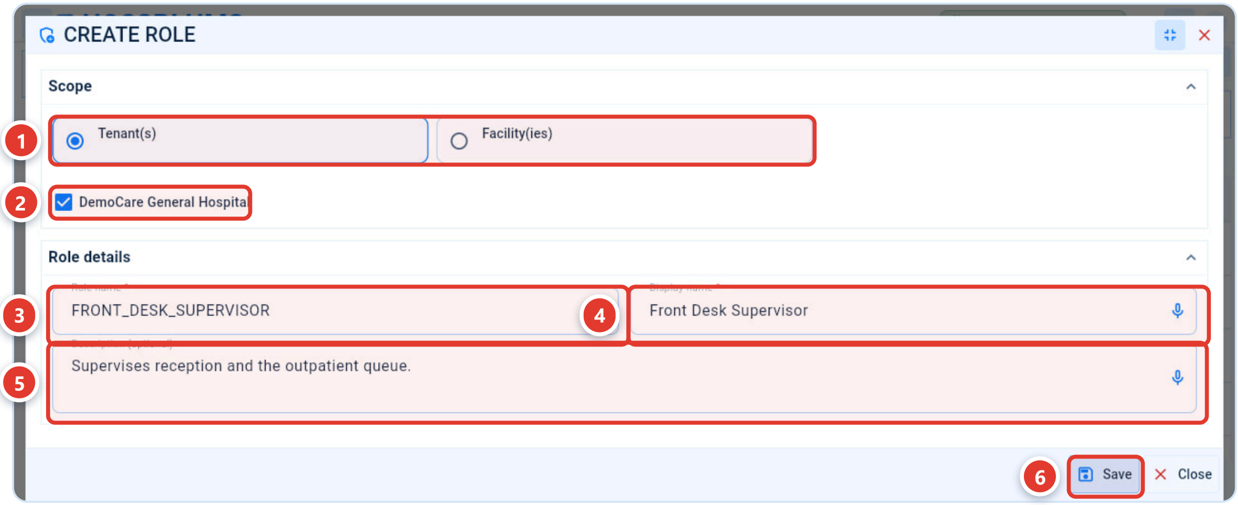

Figure 5.6. Create role, completed with sample details.

1. Under **Scope**, choose **Tenant(s)** for a role used across the organisation, or **Facility(ies)** for a role used at particular facilities.
2. Tick the organisation or facilities the role applies to.
3. Enter a **Role name**: a short, unique name such as FRONT_DESK_SUPERVISOR.
4. Enter the **Display name** that staff see.
5. Describe what the role is for in **Description**.
6. Select **Save**. A new role grants no permissions yet: select it in the list, then select **Edit permissions** to choose what it allows.

> **DELETING A ROLE**
>
> **Delete role** detaches the role from every staff member who has it. The role stays in the list, so you can restore it later.

5.6 Look up permissions and module entitlements

Who: Administrators

The **Permissions** tab lists every permission with its name, description and code, for example **Patient — Read**, which allows read access to patient records. Search it when you need to know exactly what a permission allows.

The **Module entitlements** tab shows the areas of HOSSPI HMS that your subscription package includes. If staff need an area your package does not include, see Renew or change your subscription.

CHAPTER 6

Your profile and settings

Settings that belong to you: the theme, accessibility options, your profile and password, leave requests and your roster.

6.1 Open Settings

Who: Everyone

Select **Settings** in the menu, or select your initials at the top right and then **Settings**. The tabs you see depend on your role.

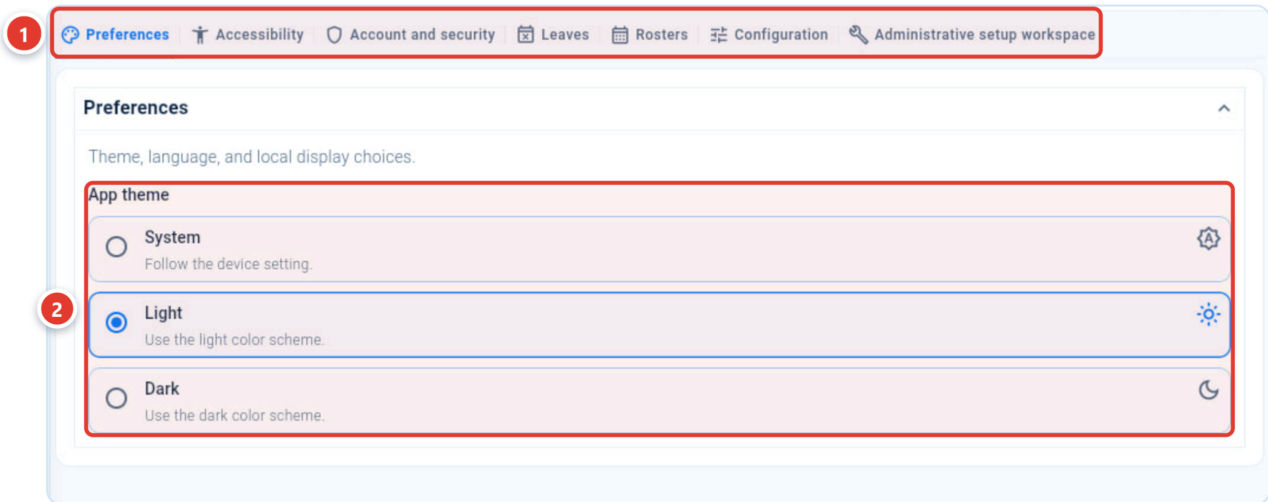

Figure 6.1. Settings, open on the Preferences tab.

1. The tabs group your settings, for example **Preferences**, **Accessibility**, **Account and security**, **Leaves** and **Rosters**. Select a tab to open it.
2. Under **App theme**, choose **System** to follow your device's setting, **Light** or **Dark**.

6.2 Make the screen easier to read

Who: Everyone

Select the **Accessibility** tab.

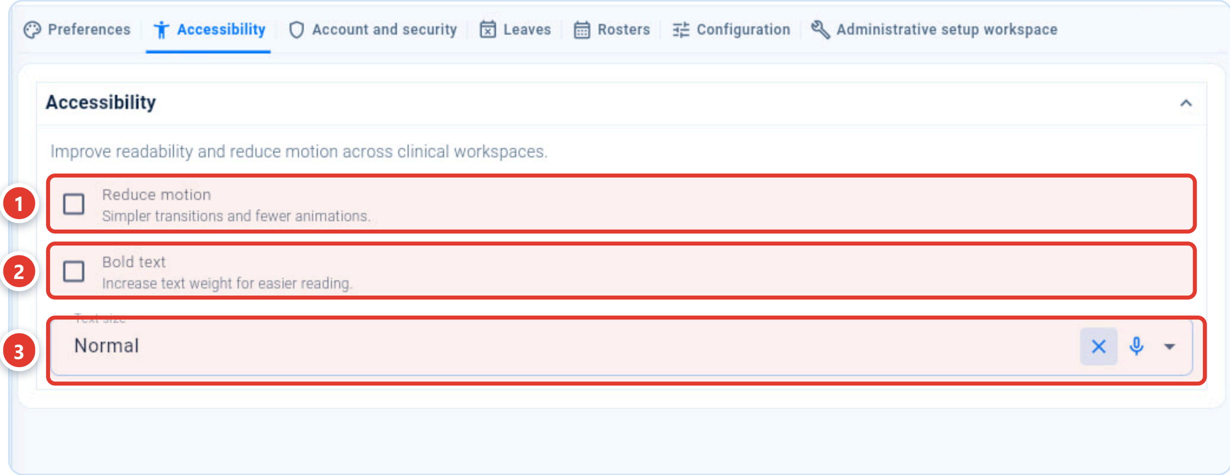

Figure 6.2. Settings, Accessibility tab.

1. Switch on **Reduce motion** for simpler transitions and fewer animations.
2. Switch on **Bold text** to make text heavier and easier to read.
3. Choose a **Text size** to make text larger or smaller throughout HOSSPI HMS.

6.3 View and update your profile

Who: Everyone

Select your initials and then **Profile**, or select the **Account and security** tab in Settings.

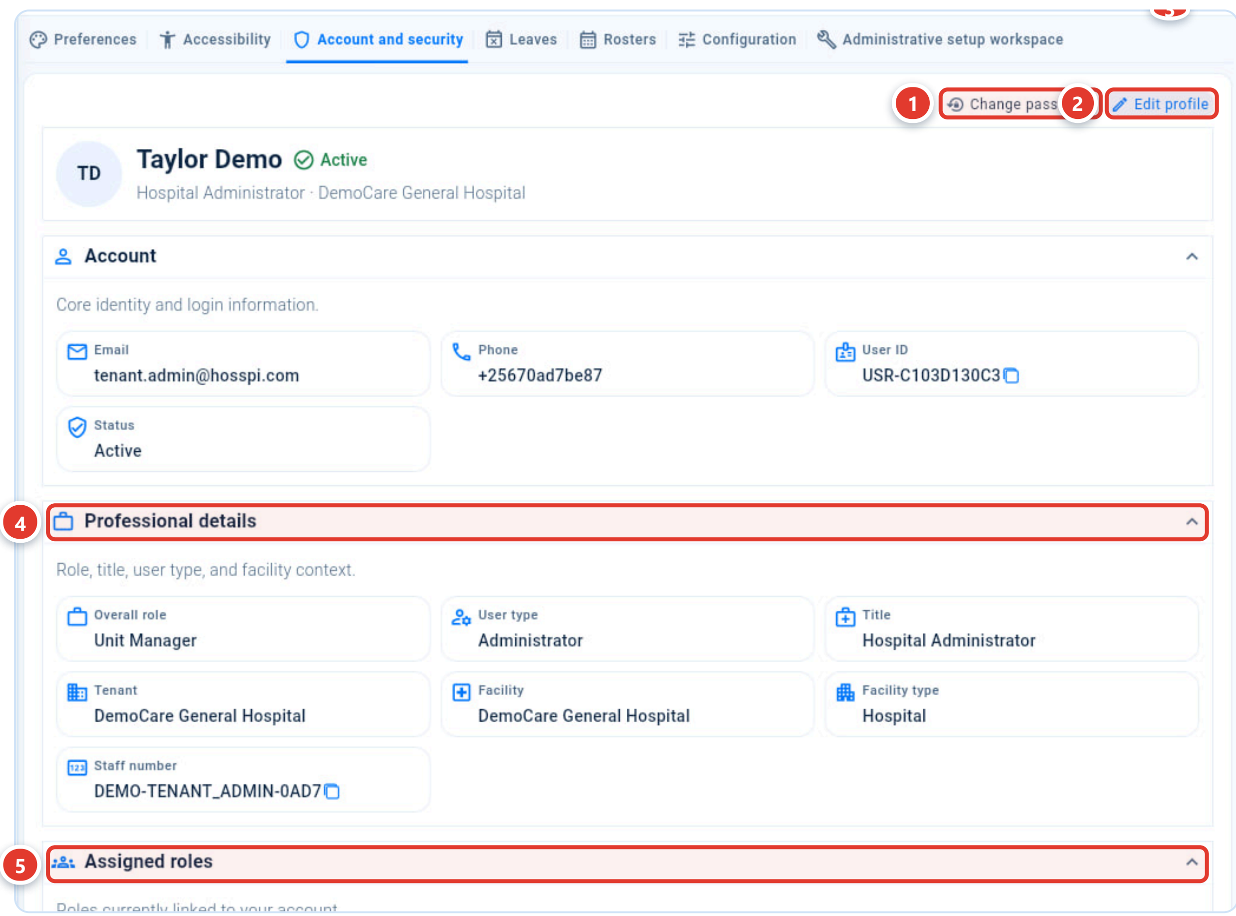

Figure 6.3. Settings, Account and security tab.

1. **Change password** lets you choose a new password. See Change your password.
2. **Edit profile** updates your **First name**, **Middle name**, **Last name** and **Gender**. Select **Save** when you have finished.
3. **Account** shows your email address, phone number, user ID and account status.
4. **Professional details** shows your role, user type, title, organisation, facility and staff number.
5. **Assigned roles** lists the roles on your account, which decide what you can open and do.

> **NOTE**
>
> Your email address, phone number, title and roles are managed by your administrator. Ask them if any of these need to change.

6.4 Change your password

Who: Everyone

Select your initials and then **Change password**, or select **Change password** on the **Account and security** tab.

Figure 6.4. Change password.

1. Enter your **Current password**.
2. Enter a **New password** of at least 8 characters. Mixing upper- and lower-case letters, numbers and symbols makes it harder to guess.
3. Enter the new password again in **Confirm password**.
4. Select **Change password**.

If you are asked to sign in again, use your new password. Forgotten your current password? Sign out and follow Reset a forgotten password.

6.5 Request leave

Who: Staff

Select the **Leaves** tab in Settings, then **Request leave**.

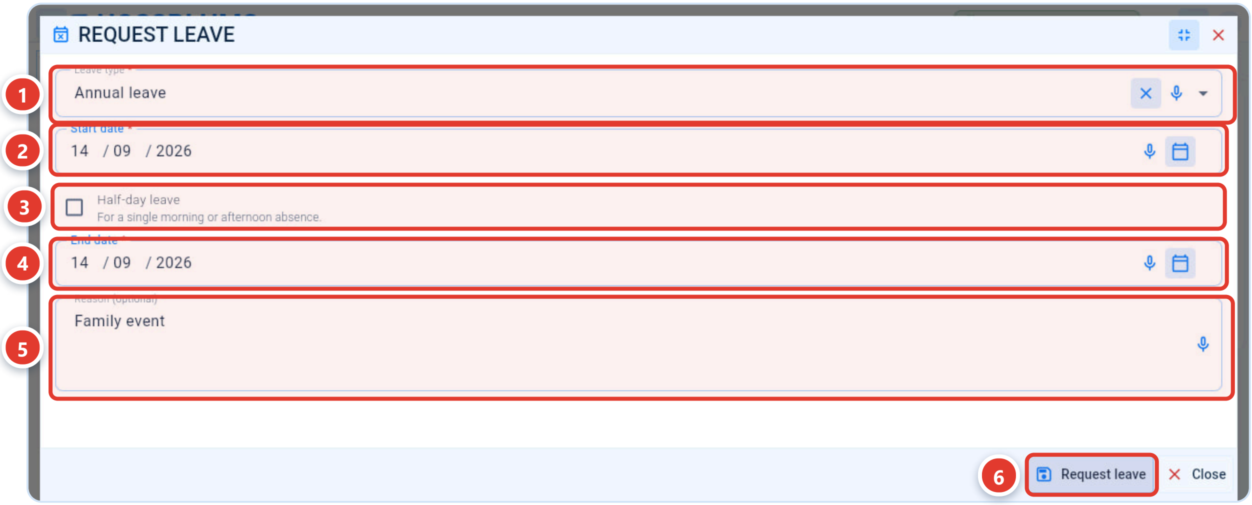

Figure 6.5. Request leave.

1. Choose the **Leave type**.
2. Enter the **Start date**.
3. Tick **Half-day leave** if you will be away for a single morning or afternoon.
4. Enter the **End date**.
5. Add a **Reason** if you wish.
6. Select **Request leave**.

Your request joins the list on the **Leaves** tab with its status. Use **All**, **Pending**, **Approved**, **Rejected** and **Cancelled** to choose which requests you see.

6.6 View your roster

Who: Staff

Select the **Rosters** tab in Settings to see the shifts assigned to you. Choose the period to show: **Today**, **Tomorrow**, **This week**, **This month**, **Last month**, **Next month** or **Next 3 months**, or select **Custom range** and pick your own dates.

CHAPTER 7

Patient registry

Every patient has one record in HOSSPI HMS. Find patients, register new ones, and keep their details, allergies and contacts up to date.

7.1 Find a patient

Who: Reception and clinical staff

Select **Patient registry** in the menu. Always search for a patient before registering them, so that nobody ends up with two records.

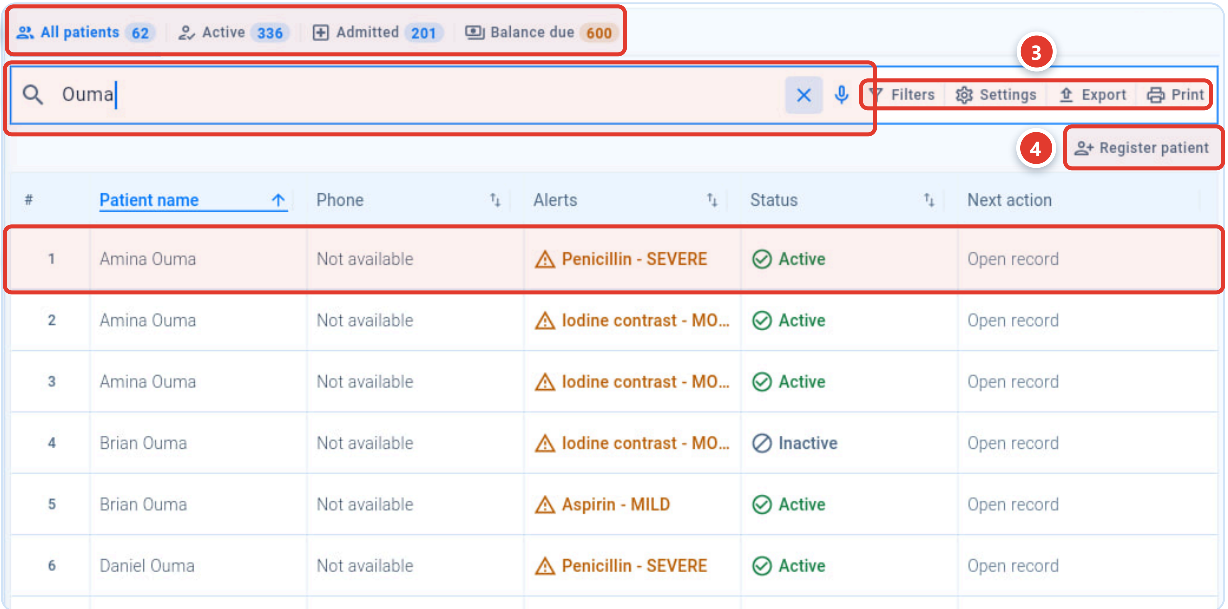

Figure 7.1. The patient registry, searched for a surname.

1. Choose a tab: **All patients**, **Active**, **Admitted**, or **Balance due** for patients who still owe money. The number on each tab shows how many patients it holds.
2. Search by name, phone number, email address, identifier or contact.
3. **Filters**, **Settings**, **Export** and **Print** work as they do on every list. See Working with lists.
4. **Register patient** adds someone who is not in HOSSPI HMS yet. See Register a new patient.
5. Select a patient to open their record. The **Alerts** column warns of allergies, such as **Aspirin - MILD**.

7.2 Register a new patient

Who: Reception staff

Select **Register patient**. You can also register a patient while booking an appointment or starting an outpatient visit.

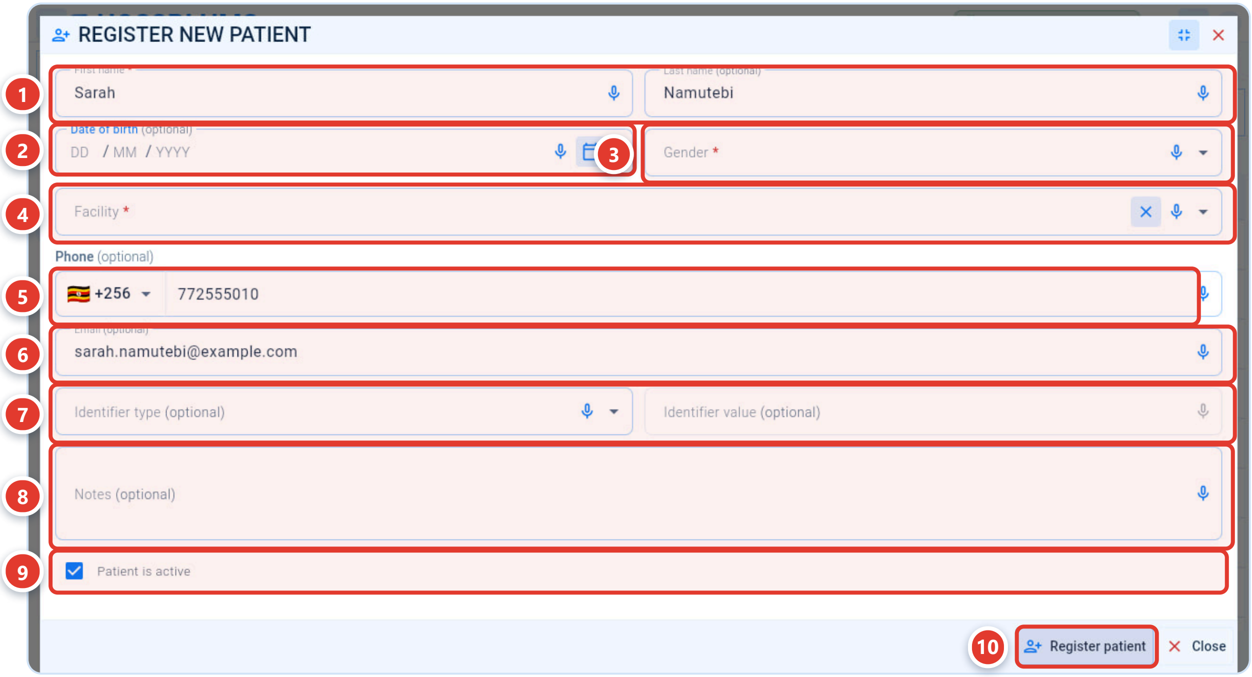

Figure 7.2. Register new patient, completed with sample details.

1. Enter the patient's **First name** and, if known, their **Last name**.
2. Enter the **Date of birth**, or select the calendar to pick it. HOSSPI HMS works out the patient's age from it.
3. Choose the patient's **Gender**.
4. Choose the **Facility** registering the patient.
5. Choose the country code and enter the patient's **Phone** number.
6. Enter the patient's **Email** address, if they have one.
7. To record an identity document or another number, choose the **Identifier type**, then enter the **Identifier value**.
8. Add any **Notes** that staff should know.
9. Keep **Patient is active** ticked.
10. Select **Register patient**.

> **TIP**
>
> Fields marked with a red asterisk (*) must be completed. To speak instead of typing, select the microphone in a field and dictate its value.

7.3 Work with a patient record

Who: Reception and clinical staff

Select a patient in the registry to open **Patient details**.

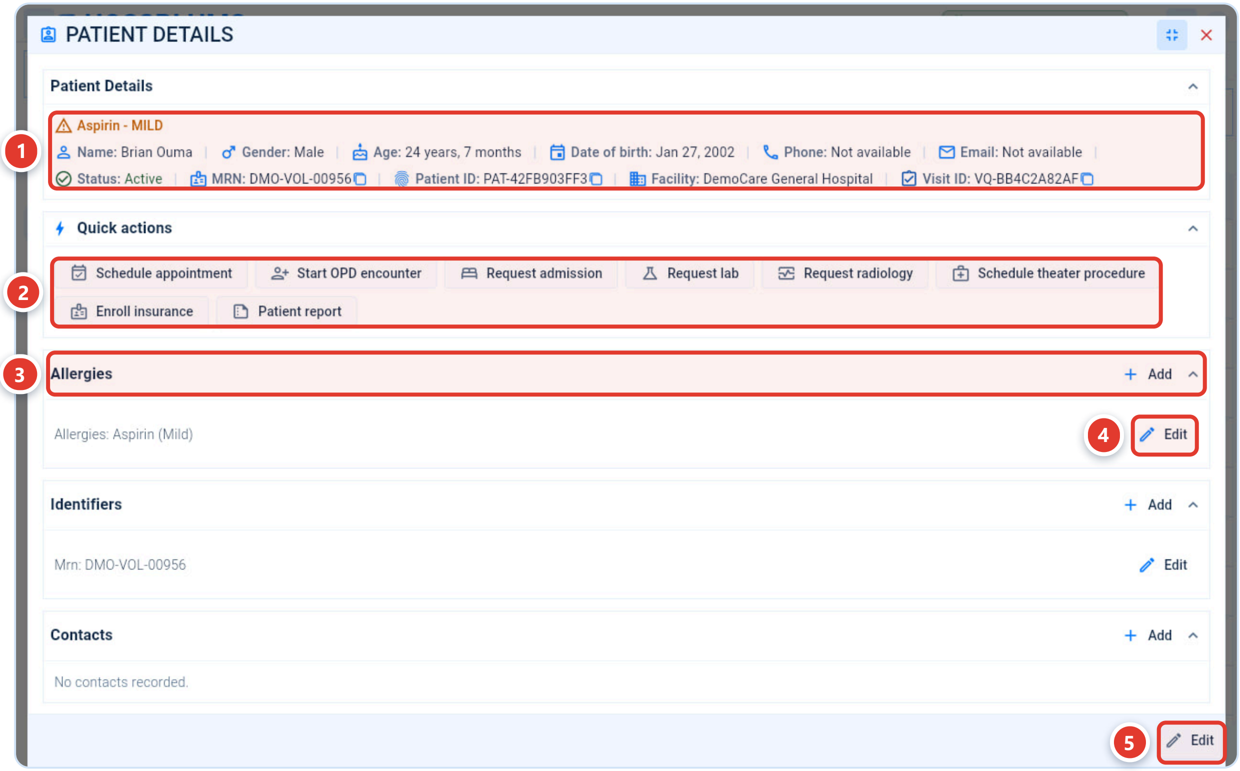

Figure 7.3. A patient record.

1. **Patient Details** sums up the patient: allergy alerts first, then their name, gender, age, date of birth, contact details, status, and identifiers such as the MRN and Patient ID. Select the copy icon beside an identifier to copy it.
2. **Quick actions** start the patient's next step: **Schedule appointment**, **Start OPD encounter**, **Request admission**, **Request lab**, **Request radiology**, **Schedule theater procedure**, **Enroll insurance** and **Patient report**.
3. Select **Add** in a section, such as **Allergies**, to record something new.
4. Select **Edit** beside an entry to correct it.
5. Select **Edit** at the bottom of the window to change the patient's registration details.

Scroll down for the other sections: **Identifiers**, **Contacts**, **Guardians**, **Medical history**, **Consents**, and the **Timeline**, which lists the patient's visits, appointments, referrals and other events, newest first.

> **KEEP ALLERGIES UP TO DATE**
>
> Allergy alerts appear wherever staff work with the patient, including when medicines are prescribed and dispensed. Record a new allergy as soon as you learn of it.

7.4 Print a patient report

Who: Reception and clinical staff

Open the patient's record and select **Patient report** under **Quick actions**.

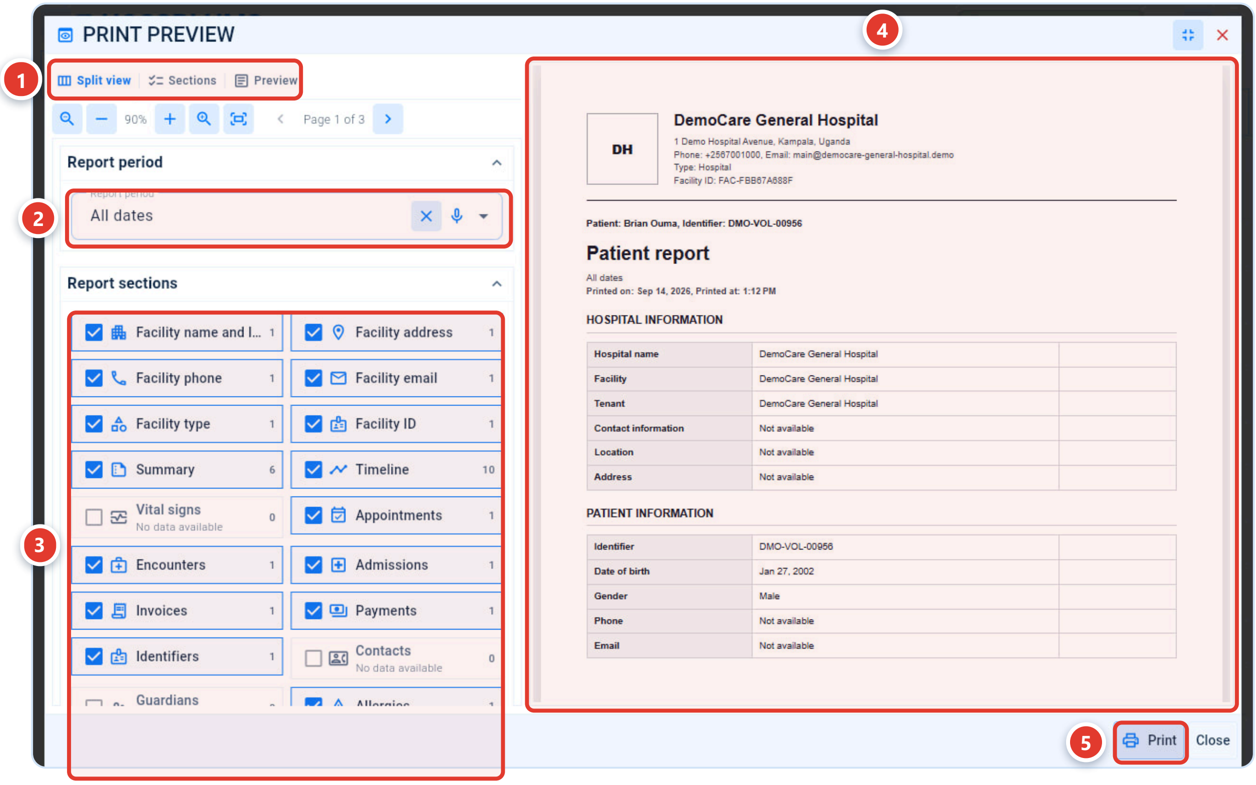

Figure 7.4. The patient report.

1. Choose how to view the window: **Split view**, **Sections** or **Preview**.
2. Choose the **Report period**, or keep **All dates**.
3. Tick the **Report sections** to include, such as **Summary**, **Timeline**, **Encounters**, **Invoices** and **Allergies**. The number on each section shows how many entries it holds; sections with no data are left out.
4. Check the report in the preview. The zoom and page buttons at the top help you read it closely.
5. Select **Print**.

CHAPTER 8

Reception and appointments

Welcome patients and visitors at the front desk: book appointments, register new patients and keep the desk queue moving.

8.1 The reception desk

Who: Reception staff

Select **Reception** in the menu.

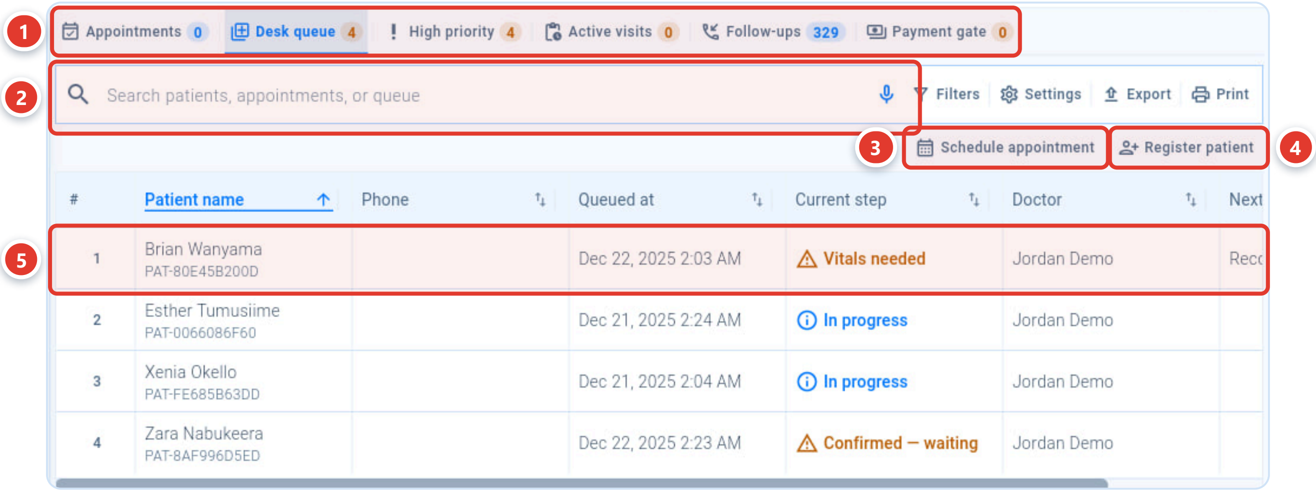

Figure 8.1. The reception desk, showing the desk queue.

1. The tabs sort the desk's work, as described in the table below.
2. Search for a patient, appointment or queue entry.
3. **Schedule appointment** books a patient or a visitor. See Book an appointment.
4. **Register patient** adds a patient who is not in HOSSPI HMS yet. See Register a new patient.
5. Each row shows the patient, when they joined the queue, their **Current step**, such as **Vitals needed**, and their doctor. Select a row to open the patient, then use **Change status** to update their place in the queue or **Change doctor** to give them to another doctor.

Tab	What it lists
Appointments	Appointments booked for patients and visitors.
Desk queue	Patients waiting at the desk, and the step each one has reached.
High priority	Queue entries marked as high priority, so they can be seen first.
Active visits	Patients whose visit is in progress.
Follow-ups	Follow-up visits planned by clinicians, with their date and time.

Tab	What it lists
Payment gate	Patients with outpatient charges still to pay. Review them here, then send the patient to the cashier: payments are taken in Billing.

8.2 Book an appointment

Who: Reception staff

Select **Schedule appointment**. The window has three tabs: **Existing patient**, **New patient** and **Visitor / staff meeting**.

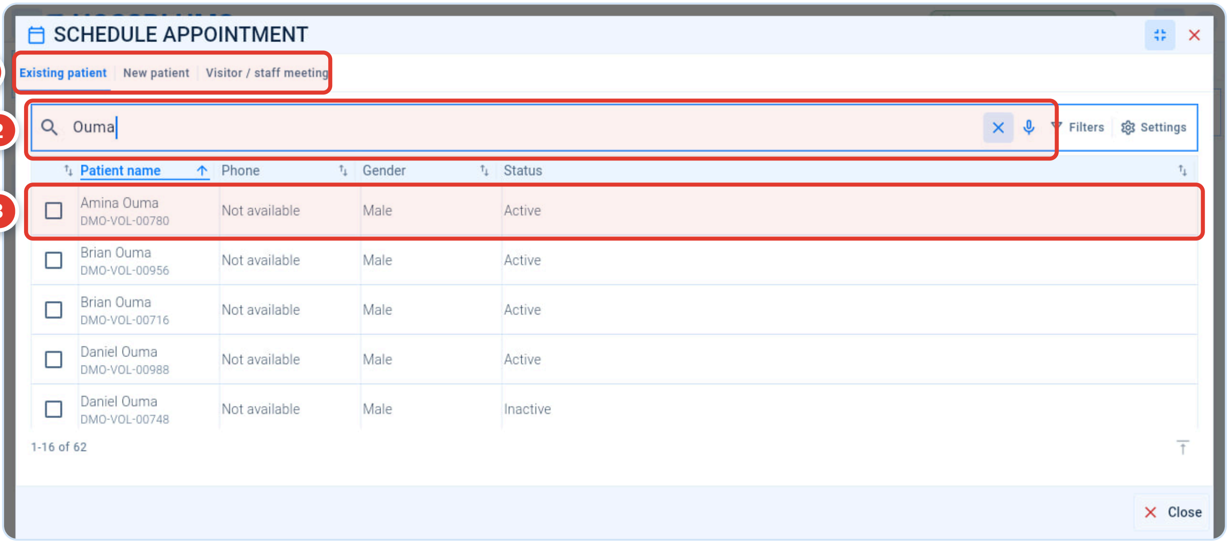

Figure 8.2. Finding a registered patient to book.

1. Choose **Existing patient** for someone who is already registered.
2. Search by name, phone number, email address, identifier or contact.
3. Tick the patient, then complete the appointment details.

The appointment details are the **Facility**, the **Contact phone** used for reminders, the **Appointment date** and **Start time**, the **End time** or **Duration minutes**, the **Provider** if you want to assign one, and the **Reason**. Select **Schedule appointment** to book.

For someone who is not registered yet, choose **New patient** and complete the same details as in Register a new patient before you book. You can also book from a patient's record with **Schedule appointment** under **Quick actions**.

8.3 Book a visitor or staff meeting

Who: Reception staff

Use the **Visitor / staff meeting** tab for people who are not patients, such as suppliers, inspectors or visiting staff.

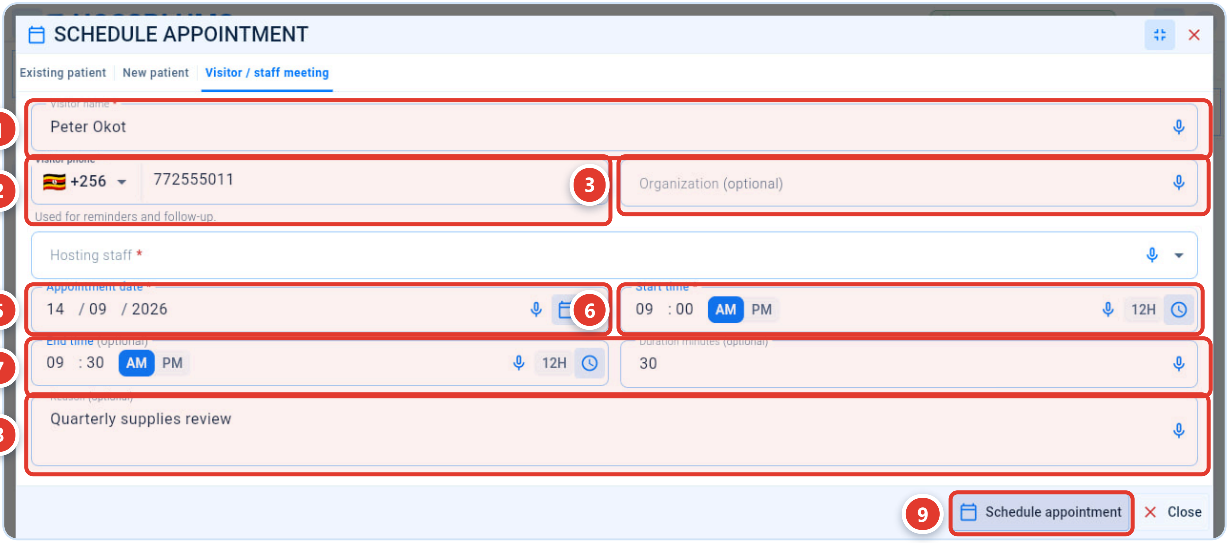

Figure 8.3. Booking a visitor, completed with sample details.

1. Enter the **Visitor name**.
2. Enter the **Visitor phone** number. It is used for reminders and follow-up.
3. Enter the visitor's **Organization**, if they have one.
4. Choose the **Hosting staff** member they are coming to see.
5. Set the **Appointment date**.
6. Set the **Start time**, choosing **AM** or **PM**.
7. Check the **End time** and **Duration minutes**. Change either one if the meeting will be longer.
8. Add the **Reason** for the visit, if you wish.
9. Select **Schedule appointment**.

CHAPTER 9

Outpatient care (OPD)

Take outpatients from arrival to the doctor: start the visit, record triage and vital signs, and hand the patient over for consultation.

9.1 The OPD worklist

Who: Nurses and outpatient staff

Select **Outpatient (OPD)** in the menu.

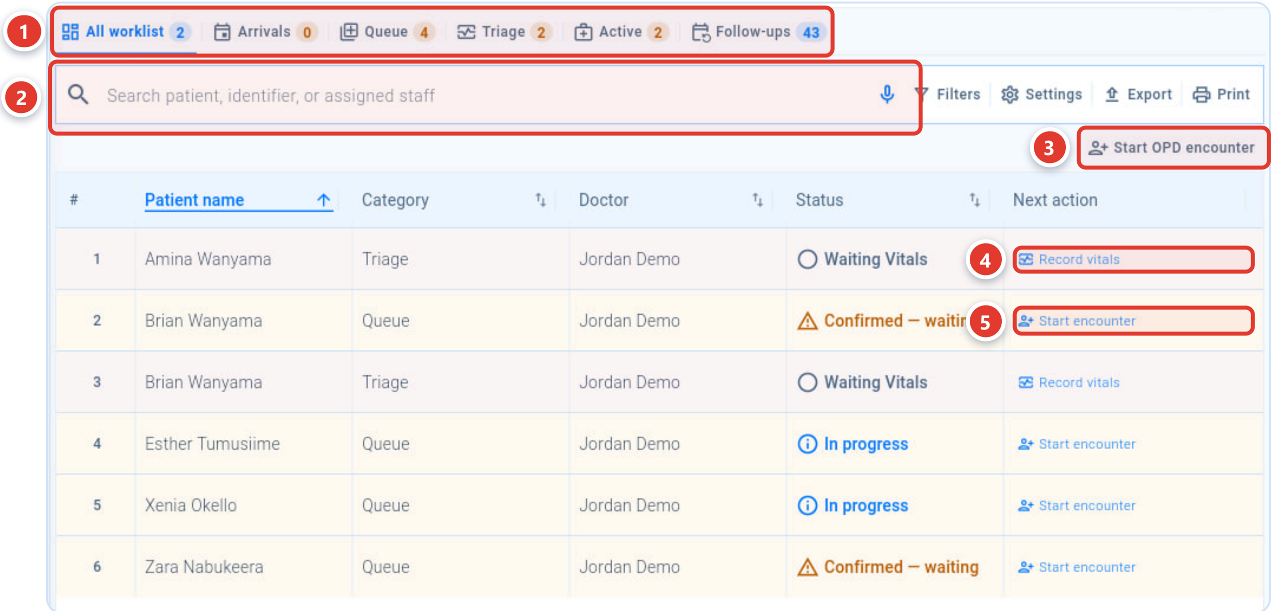

Figure 9.1. The outpatient worklist.

1. The tabs follow patients through the department, as described in the table below.
2. Search by patient, identifier or assigned staff.
3. **Start OPD encounter** begins a visit. See Start an OPD encounter.
4. For a patient who is **Waiting Vitals**, select **Record vitals**. See Record triage and vital signs.
5. For a patient who is **Confirmed — waiting**, select **Start encounter** when the doctor is ready to see them.

Tab	What it lists
All worklist	Every outpatient who still needs something done.
Arrivals	Scheduled and checked-in patients.
Queue	Patients waiting, with their doctor and how long they have waited.
Triage	Patients waiting for triage and vital signs.
Active	Patients in consultation.

Tab	What it lists
Follow-ups	Planned follow-up visits.

9.2 Start an OPD encounter

Who: Reception staff and nurses

An encounter is a single visit. Everything done for the patient during the visit, from vital signs to prescriptions and charges, is recorded against it. Select **Start OPD encounter**.

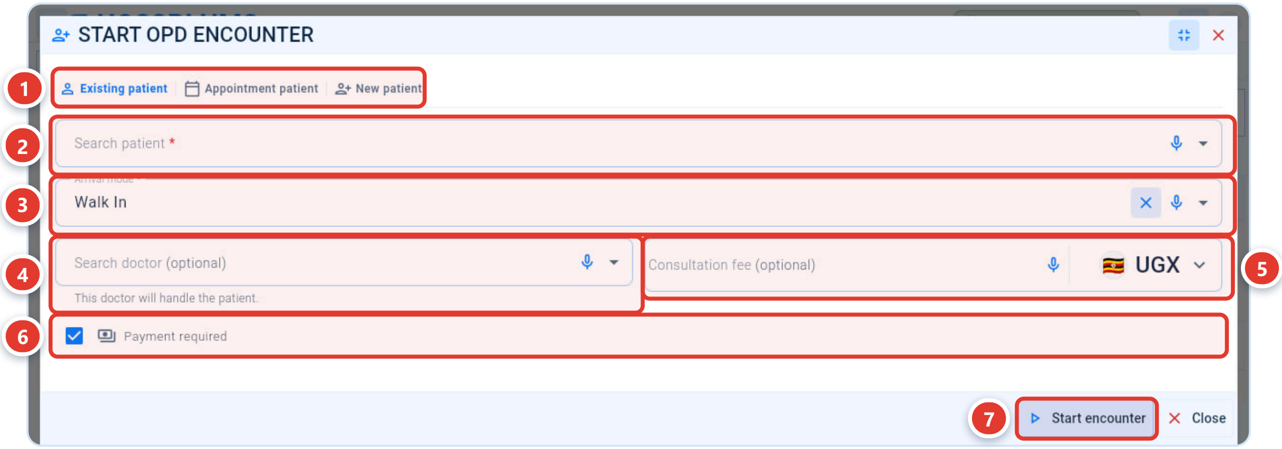

Figure 9.2. Start OPD encounter.

1. Choose **Existing patient**, **Appointment patient** for someone who has booked, or **New patient** to register someone first.
2. Search for the patient and select them.
3. Choose the **Arrival mode**: **Walk-in**, **Appointment**, **Emergency** or **Follow-up**.
4. Choose the doctor who will see the patient, if you know who it is.
5. Enter a **Consultation fee** only if this visit is charged differently; otherwise the usual fee applies. Check the currency beside it.
6. Keep **Payment required** ticked if the patient must pay before they are seen. Until they pay, they appear under **Payment gate** at reception.
7. Select **Start encounter**.

9.3 Record triage and vital signs

Who: Nurses

On the **Triage** tab, select **Record vitals** on the patient's row. Check the patient's name, age and gender at the top of the window before you record anything.

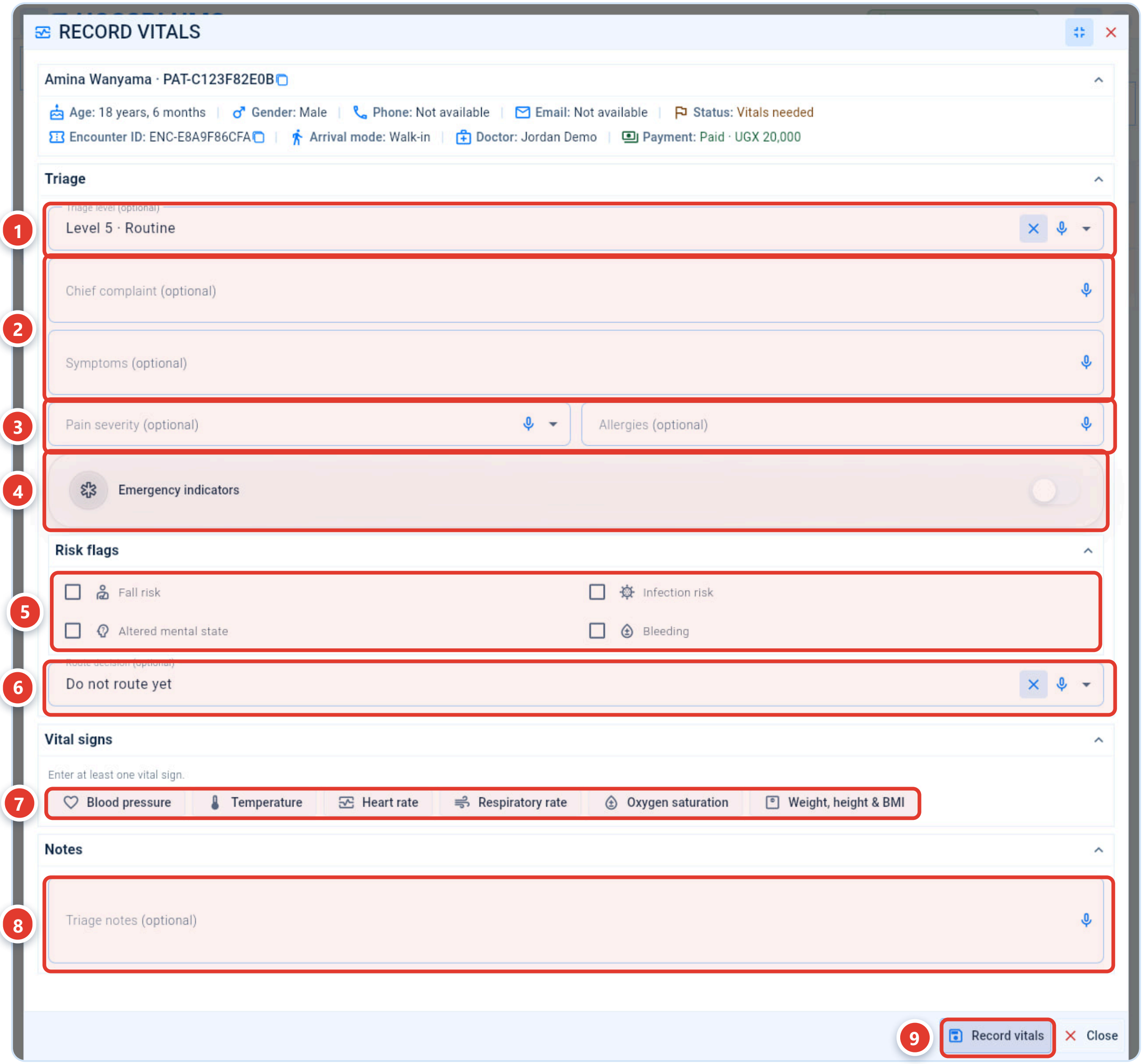

Figure 9.3. Record vitals.

1. Choose the **Triage level**, from **Level 1 · Immediate** for the most urgent patients to **Level 5 · Routine**.
2. Enter the **Chief complaint**, in the patient's words, and any **Symptoms**.
3. Choose the **Pain severity**, from **No pain** to **Worst imaginable**, and note any **Allergies**.
4. Switch on **Emergency indicators** if the patient shows signs of an emergency.
5. Tick any **Risk flags** that apply: **Fall risk**, **Infection risk**, **Altered mental state** or **Bleeding**.
6. Choose a **Route decision** to send the patient straight to the laboratory, radiology or pharmacy, or keep **Do not route yet**.
7. Under **Vital signs**, select each measurement you took, such as **Blood pressure**, **Temperature** or **Weight, height & BMI**, and enter the reading. Record at least one vital sign.
8. Add **Triage notes**, if you wish.
9. Select **Record vitals**.

The patient then waits for their doctor. To give the patient to a different doctor, select their row on the worklist, then **Change doctor** under **Quick actions**.

CHAPTER 10

Consultations

Doctors review each encounter, write clinical notes, record diagnoses, order investigations and treatment, and decide what happens next.

10.1 The clinical worklist

Who: Doctors and clinical officers

Select **Clinical (Doctors)** in the menu.

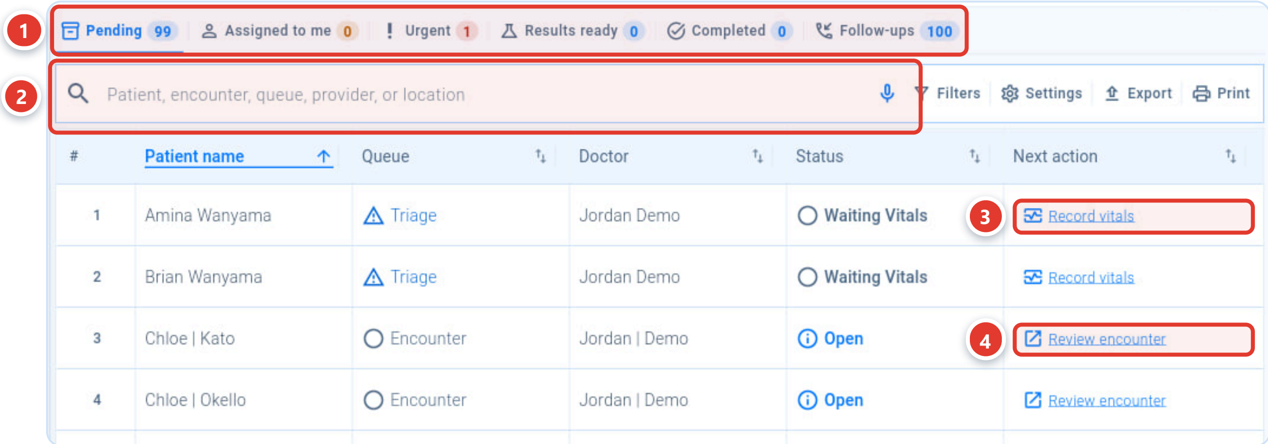

Figure 10.1. The clinical worklist.

1. Choose a tab: **Pending**, **Assigned to me**, **Urgent**, **Results ready** for patients whose investigation results are back, **Completed** or **Follow-ups**.
2. Search by patient, encounter, queue, provider or location.
3. If a patient still needs vital signs, **Record vitals** opens the same form that nurses use.
4. Select **Review encounter** to open the patient's encounter.

10.2 Review an encounter

Who: Doctors and clinical officers

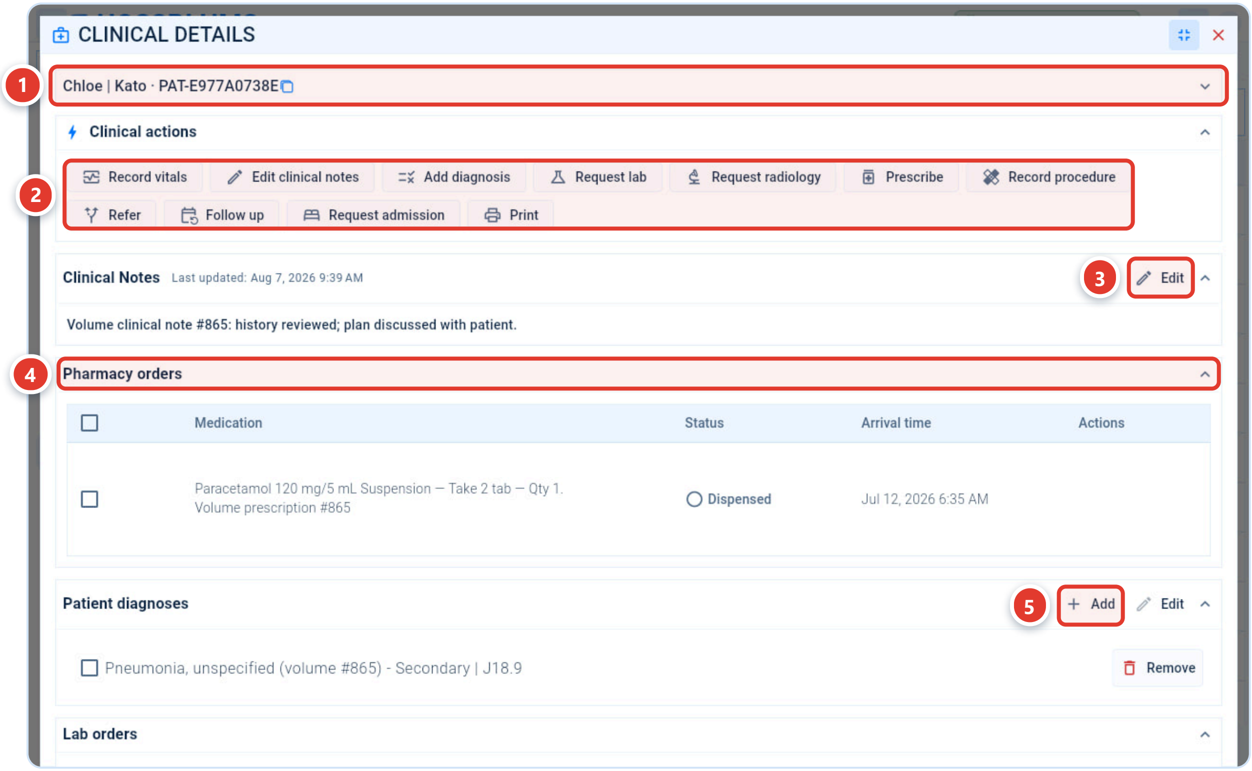

Figure 10.2. An encounter open in Clinical details.

1. The patient's name and ID. Select the bar to show their full details, including allergy alerts.
2. **Clinical actions** are what you can do for this patient. The sections that follow explain each one.
3. Select **Edit** beside **Clinical Notes** to write or update your notes for the visit.
4. Every order appears in its own section, such as **Pharmacy orders**, **Lab orders** and **Radiology orders**, together with its status.
5. Select **Add** beside **Patient diagnoses** to record a diagnosis.

Scroll down for **Procedures**, **Referrals**, **Follow-ups**, **Admissions** and **Care plans**. Lab results appear under **Lab orders** as soon as the laboratory releases them, with a flag such as **High** or **Low** beside any result outside the normal range.

10.3 Write clinical notes

Who: Doctors and clinical officers

Select **Edit clinical notes** under **Clinical actions**, or **Edit** beside **Clinical Notes**.

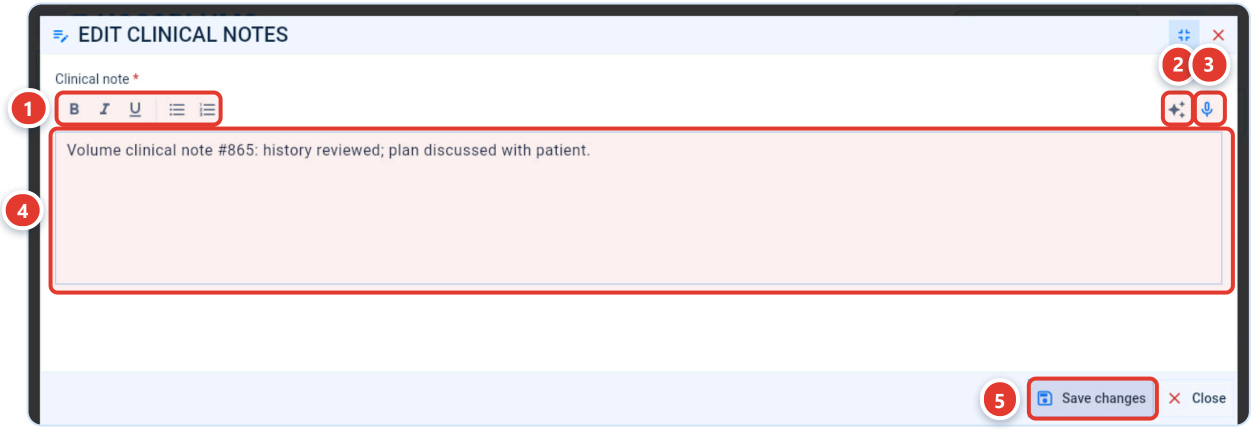

Figure 10.3. Edit clinical notes.

1. Format the note with the toolbar: bold, italic, underline, and bulleted or numbered lists.
2. **Format note with AI** rewrites your note in clear, professional medical language. It does not add facts, but always read the result before you save it. It needs an internet connection.
3. Select the microphone to dictate the note instead of typing it.
4. Write the note, for example the history, examination findings and your plan.
5. Select **Save changes**.

10.4 Record a diagnosis

Who: Doctors and clinical officers

Select **Add diagnosis**.

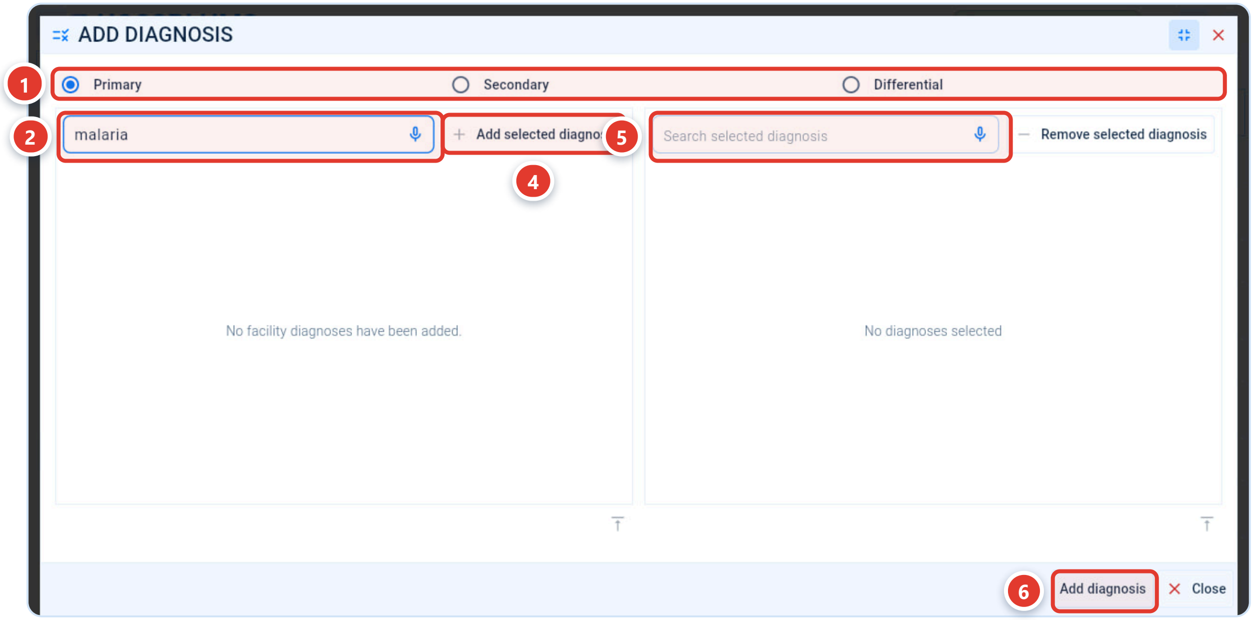

Figure 10.4. Add diagnosis.

1. Choose the diagnosis type: **Primary**, **Secondary** or **Differential**.
2. Search your facility's diagnoses by name or code.
3. Tick each diagnosis that applies.

4 Select **Add selected diagnosis** to move the ticked diagnoses to the list on the right.

5 Check the selected diagnoses, searching them if the list is long. To take one off the list, tick it and select **Remove selected diagnosis**.

6 Select **Add diagnosis**.

> **NOTE**
>
> The search only lists the diagnoses your facility has added. If you see **No facility diagnoses have been added**, ask your administrator to add them. See Choose the clinical services you offer.

10.5 Order laboratory tests

Who: Doctors and clinical officers

Select **Request lab**. The window shows the patient and encounter IDs. Select **Add Lab Orders** to choose the tests.

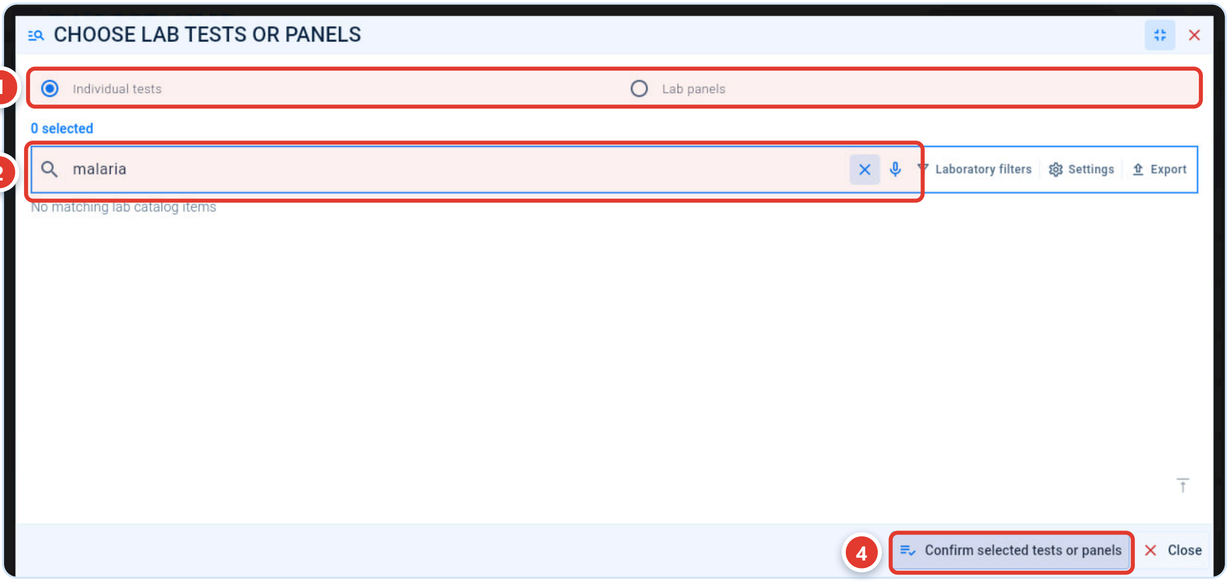

Figure 10.5. Choosing laboratory tests.

1 Choose **Individual tests**, or **Lab panels** to order a group of tests together.

2 Search the laboratory catalogue by name, code, category or specimen. The count above the search shows how many items you have selected.

3 Tick each test or panel you need.

4 Select **Confirm selected tests or panels**.

Back in the request window, select **Review billing** to check the charges, then select **Request lab**. The order appears on the laboratory worklist straight away. See The laboratory worklist.

> **NOTE**
>
> Only the tests your facility offers appear in the catalogue. If a test is missing, ask your administrator to add it under **Clinical Services**.

10.6 Order imaging

Who: Doctors and clinical officers

Select **Request radiology**, then **Add study**.

1. Under **Request details**, choose the **Modality**, the **Laterality** (the side of the body) and the **Priority**.
2. Add a **Clinical note** for the radiologist.
3. Search the radiology catalogue, tick the studies you need, and select **Confirm selected studies**.
4. Select **Review billing** to check the charges, then select **Request radiology**.

10.7 Prescribe medicines

Who: Doctors and clinical officers

Select **Prescribe**, then **Add medicine**.

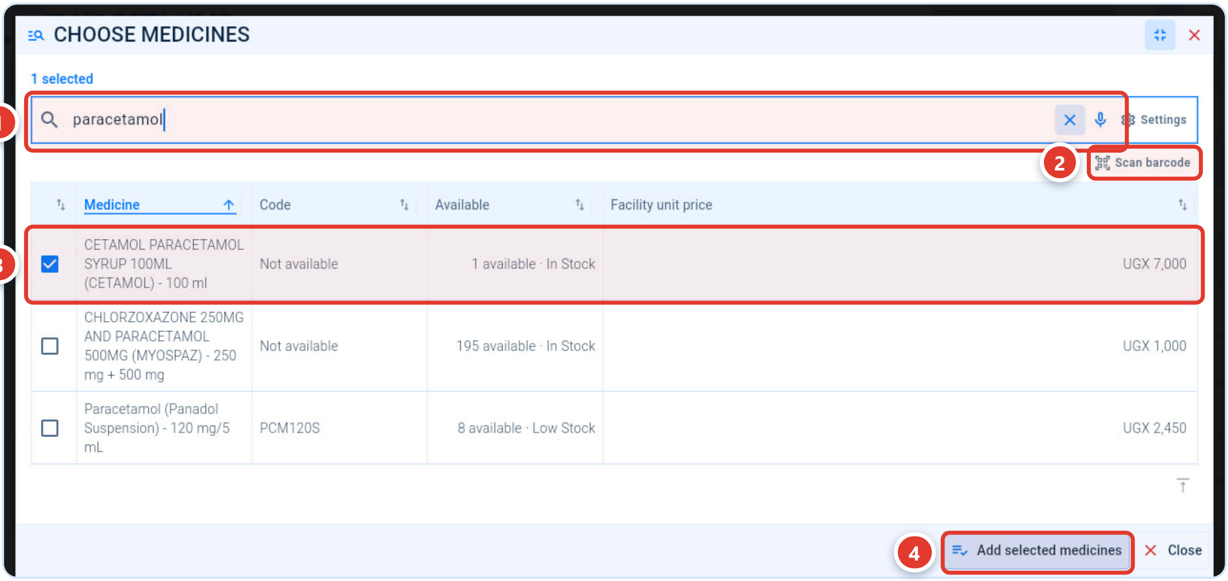

Figure 10.6. Choosing medicines.

1. Search the medicines available at your facility by name or code.
2. Or select **Scan barcode** to find a medicine by scanning its barcode.
3. Tick each medicine to prescribe. The list shows how many are **Available**, whether stock is low, and the **Facility unit price**.
4. Select **Add selected medicines**.

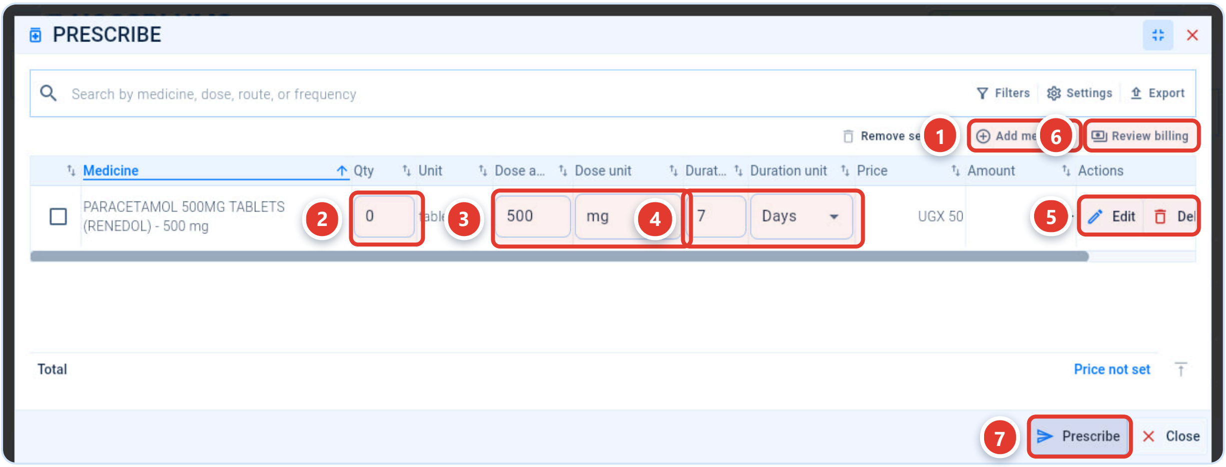

Figure 10.7. Completing the prescription.

1. Select **Add medicine** again to add more medicines.
2. Enter the **Quantity** to supply.
3. Enter the **Dose amount** and choose the **Dose unit**.
4. Enter the **Duration** and choose the **Duration unit**.
5. Select **Edit** to set the **Medication route**, **Frequency** and **Instructions**, then **Done**. Select **Delete** to remove a medicine. HOSSPI HMS warns you when the quantity does not match the dose, frequency and duration.
6. Select **Review billing** to check the charges.
7. Select **Prescribe**. The prescription appears on the pharmacy worklist.

> **CHECK ALLERGIES FIRST**
>
> Check the patient's allergy alerts before you prescribe. Select the patient bar at the top of the encounter to see them.

10.8 Procedures, referrals, follow-ups and admission

Who: Doctors and clinical officers

The remaining **Clinical actions** each open a short form:

Action	What to do
Record procedure	Select **Add items** to choose the procedures you carried out, **Review billing** to check the charges, then **Record procedure**.
Refer	Enter the **External facility** and the **Reason** for the referral, add any **Notes**, then select **Save referral**.
Follow up	Choose the **Follow-up date** and **Follow-up time**, add any **Notes**, then select **Save follow-up**. The visit appears under **Follow-ups** at reception and on the worklists.
Request admission	Enter the **Admission reason** and any **Notes**, then select **Request admission**. The request waits in the ward team's **Admission Queue**. See The admissions worklist.
Print	Print a summary of the encounter.

CHAPTER 11

Laboratory

Receive test orders, enter and check results, and make them available to the doctors who asked for them.

11.1 The laboratory worklist

Who: Laboratory staff

Select **Laboratory** in the menu.

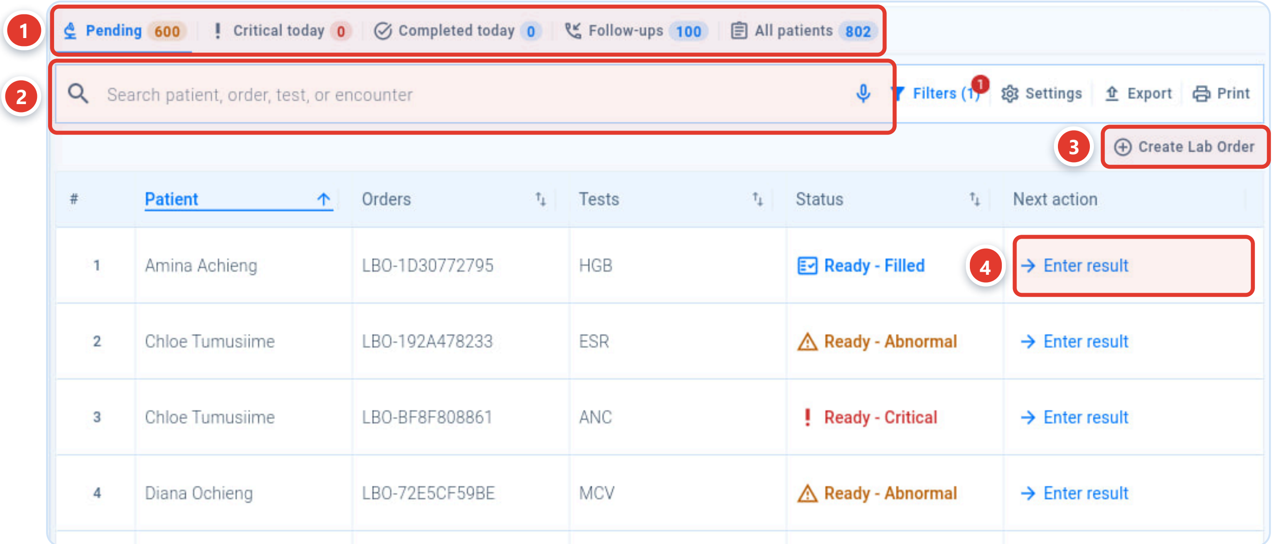

Figure 11.1. The laboratory worklist.

1. Choose a tab: **Pending**, **Critical today**, **Completed today**, **Follow-ups** or **All patients**.
2. Search by patient, order, test or encounter.
3. **Create Lab Order** records tests for a patient who arrives without an order from a doctor. See Create a lab order.
4. Select **Enter result** to record the results of an order. See Enter lab results.

Status	Meaning
Ready - Filled	Results have been entered.
Ready - Abnormal	At least one result is outside the normal range.
Ready - Critical	At least one result is at a critical level. Select **Escalate critical result** to alert the clinical team.
Completed	The order is complete and ready for the doctor to review.

11.2 Create a lab order

Who: Laboratory staff

Select **Create Lab Order**. Select or register the **Patient**. Choosing an existing lab order is optional: if you do not choose an encounter, HOSSPI HMS creates or reuses an open laboratory encounter for the patient. Select **Next**, then choose the tests to run.

11.3 Enter lab results

Who: Laboratory staff

Select **Enter result** on the order.

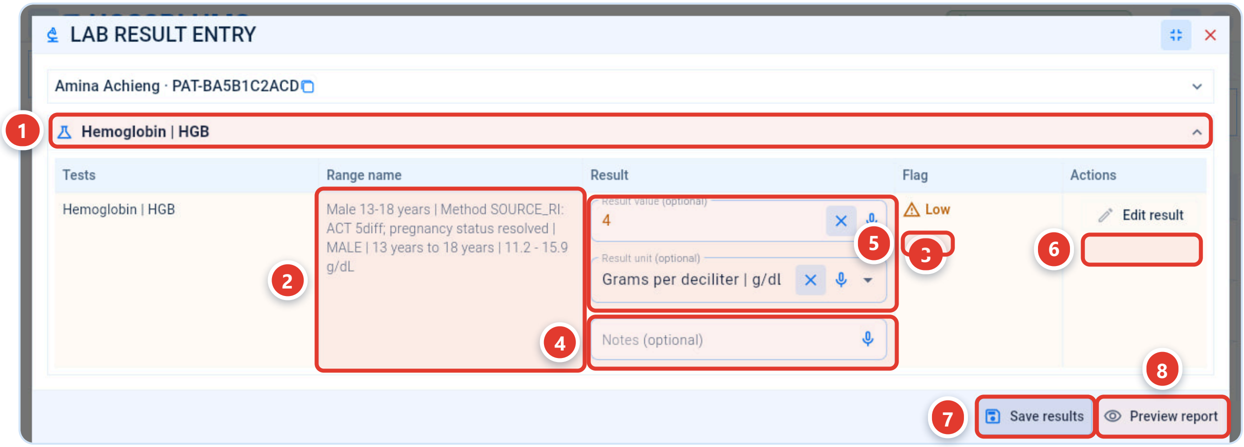

Figure 11.2. Lab result entry.

1. Each test in the order has its own section. Check that it is the right test for the right patient; select the bar at the top to see the patient's details.
2. **Range name** shows the reference range that applies to this patient, for example by sex and age.
3. Enter the **Result value** and choose the **Result unit**.
4. Add **Notes** about the sample or the result, if needed.
5. HOSSPI HMS compares the result with the reference range and shows a **Flag**, such as **Low** or **High**.
6. Select **Edit result** to change a result that has already been entered.
7. Select **Save results**.
8. Select **Preview report** to see the lab report as it will be printed.

> **CRITICAL RESULTS**
>
> Tell the doctor about a critical result straight away. On the worklist, **Escalate critical result** alerts the clinical team.

CHAPTER 12

Radiology

Take imaging requests, then write, check and release the radiology report.

12.1 The radiology worklist

Who: Radiology staff

Select **Radiology** in the menu.

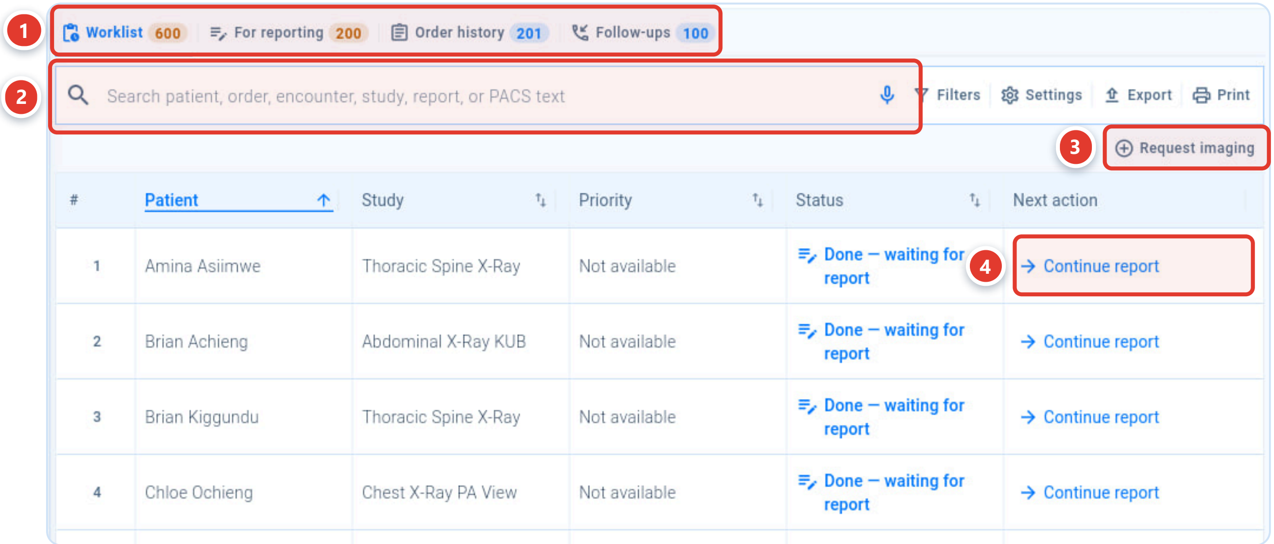

Figure 12.1. The radiology worklist.

1. Choose a tab: **Worklist**, **For reporting**, **Order history** or **Follow-ups**.
2. Search by patient, order, encounter, study, report or PACS text.
3. **Request imaging** records a study for a patient who arrives without a request from a doctor. Search the catalogue, choose the **Patient** and, if there is one, the **Encounter**, add **Clinical notes**, then select **Request imaging**.
4. For a study that is **Done — waiting for report**, select **Continue report**. See Report a study.

12.2 Report a study

Who: Radiologists

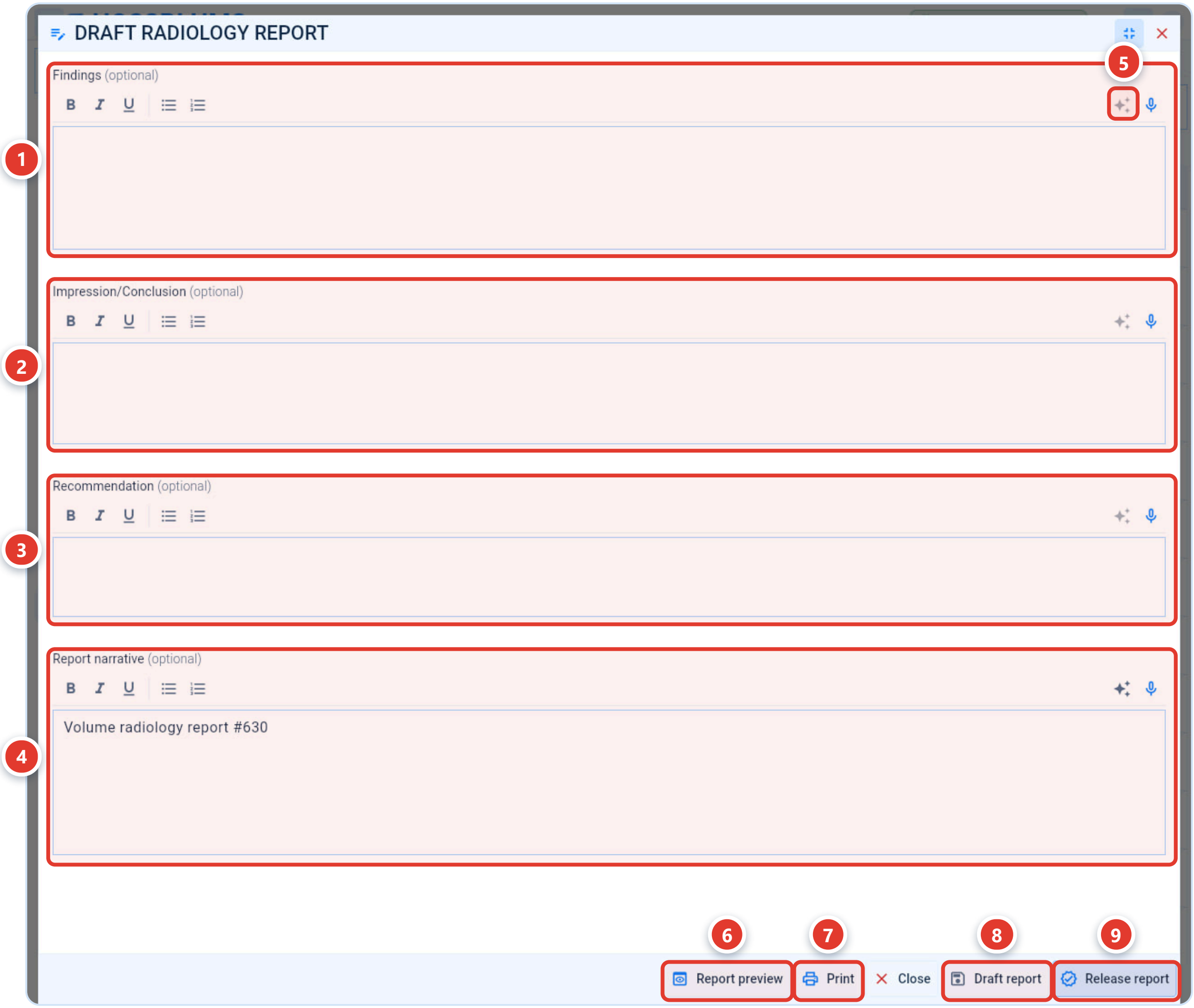

Figure 12.2. Writing a radiology report.

1. Describe what you see in **Findings**.
2. Give your **Impression/Conclusion**.
3. Add a **Recommendation**, such as further imaging or a review.
4. Write the full **Report narrative**, if your facility uses one.
5. **Format note with AI** rewrites a section in clear, professional language without adding facts. Read the result before you continue. You can also dictate each section with the microphone.
6. Select **Report preview** to see the report as it will be printed.
7. Select **Print** to print it.
8. Select **Draft report** to save your work and finish later.
9. Select **Release report** when the report is final. Released studies move to **Order history** with the status **Reported**.

CHAPTER 13

Pharmacy

Dispense prescriptions from the consulting rooms and wards, and sell medicines to walk-in customers.

13.1 The pharmacy worklist

Who: Pharmacy staff

Select **Pharmacy** in the menu.

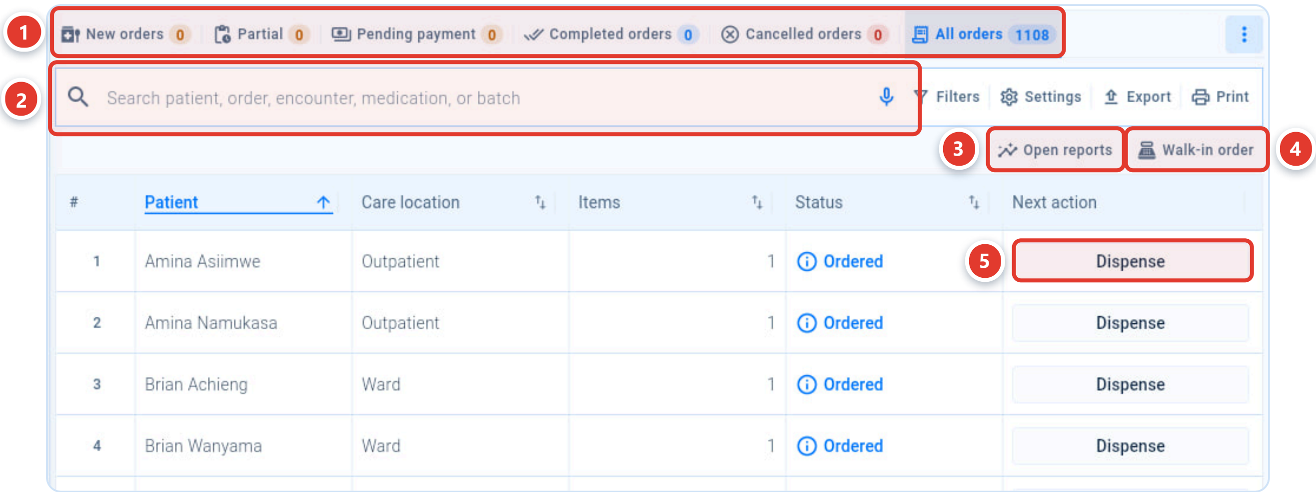

Figure 13.1. The pharmacy worklist.

1. Choose a tab: **New orders**, **Partial**, **Pending payment**, **Completed orders**, **Cancelled orders** or **All orders**. **More tabs** holds the rest, such as the catalogue and stock.
2. Search by patient, order, encounter, medication or batch.
3. **Open reports** shows the pharmacy's reports.
4. **Walk-in order** sells medicines to a customer without a prescription. See Sell to a walk-in customer.
5. Select **Dispense** to supply the medicines in an order. The **Dispense** column shows how many items have been supplied, for example **0 / 4**, and **Care location** shows whether the order is from outpatients or a ward.

13.2 Dispense a prescription

Who: Pharmacy staff

Select **Dispense** on the order. Check the patient's allergy alerts before you hand anything over.

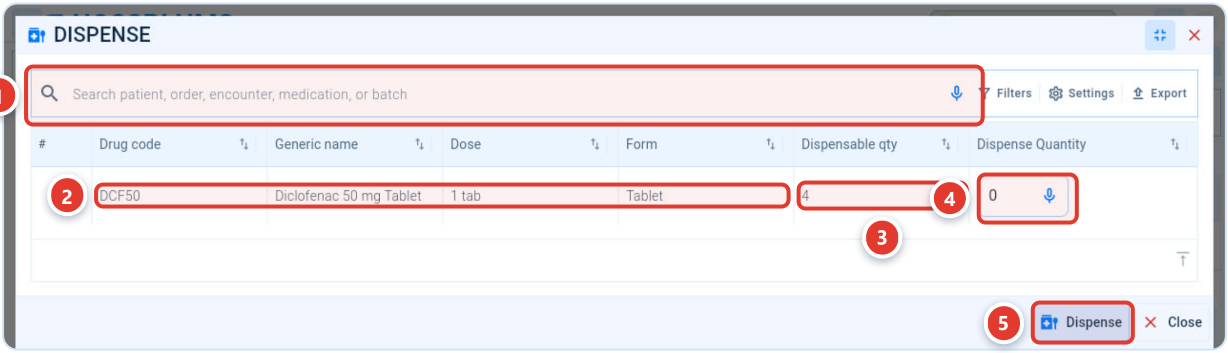

Figure 13.2. Dispensing an order.

1. If the order is long, search its medicines by name or batch.
2. Check each medicine: its **Drug code**, **Generic name**, **Dose** and **Form**.
3. **Dispensable qty** is how much of the medicine is still to be supplied.
4. Enter the **Dispense Quantity** you are handing over.
5. Select **Dispense**.

An order that is only partly supplied appears under **Partial**, so you can finish it later. Orders that must be paid for first wait under **Pending payment**.

13.3 Sell to a walk-in customer

Who: Pharmacy staff

Select **Walk-in order**.

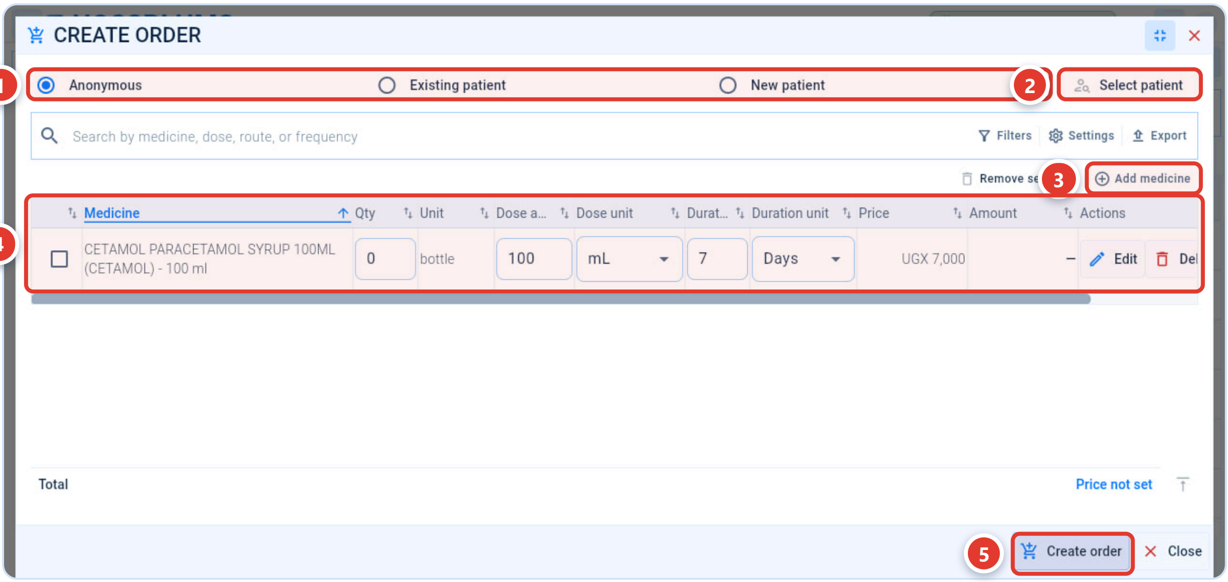

Figure 13.3. A walk-in order.

1. Choose who is buying: **Anonymous**, **Existing patient** or **New patient**.
2. For an existing patient, select **Select patient** and find them.
3. Select **Add medicine**, tick the medicines as described in Prescribe medicines, then select **Add selected medicines**.

4. Enter the **Qty** of each medicine and check its dose and duration. Select **Delete** to remove a medicine.
5. Select **Create order**.

CHAPTER 14

Admissions and wards

Admit patients, allocate beds and follow each admission from the ward round to discharge.

14.1 The admissions worklist

Who: Ward staff and admissions officers

Select **Inpatient (IPD)** in the menu.

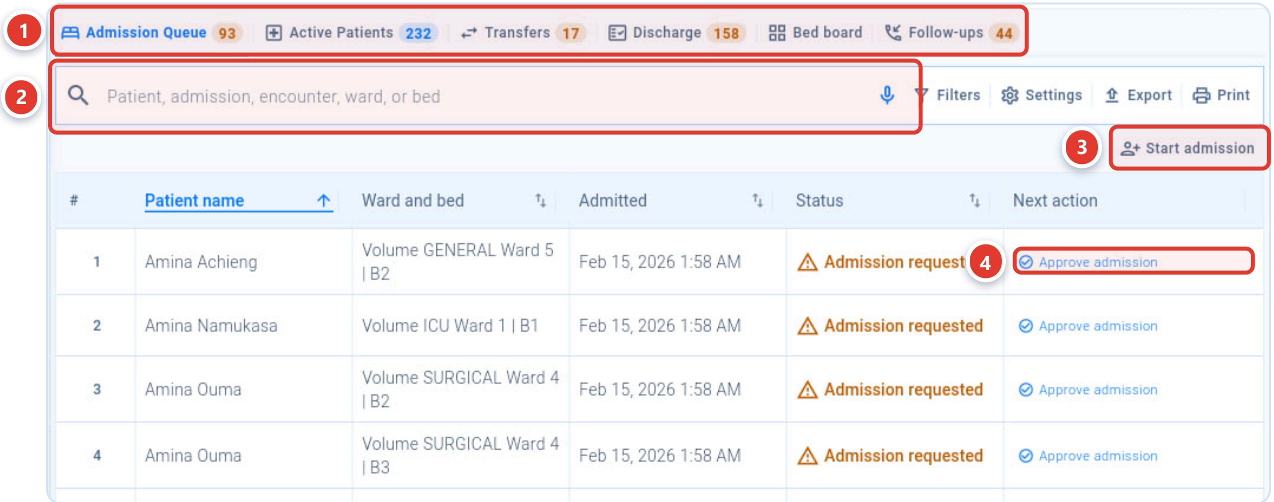

Figure 14.1. The admissions worklist.

1. Choose a tab: **Admission Queue**, **Active Patients**, **Transfers**, **Discharge**, **Bed board** or **Follow-ups**.
2. Search by patient, admission, encounter, ward or bed.
3. **Start admission** admits a patient directly. See Admit a patient.
4. Admission requests from doctors wait in the **Admission Queue**. Select **Approve admission** to accept one.

The **Bed board** tab shows the beds on each ward and whether they are free. Select **Manage beds** there to change them; see Add wards, rooms and beds.

14.2 Admit a patient

Who: Ward staff and admissions officers

Select **Start admission**.

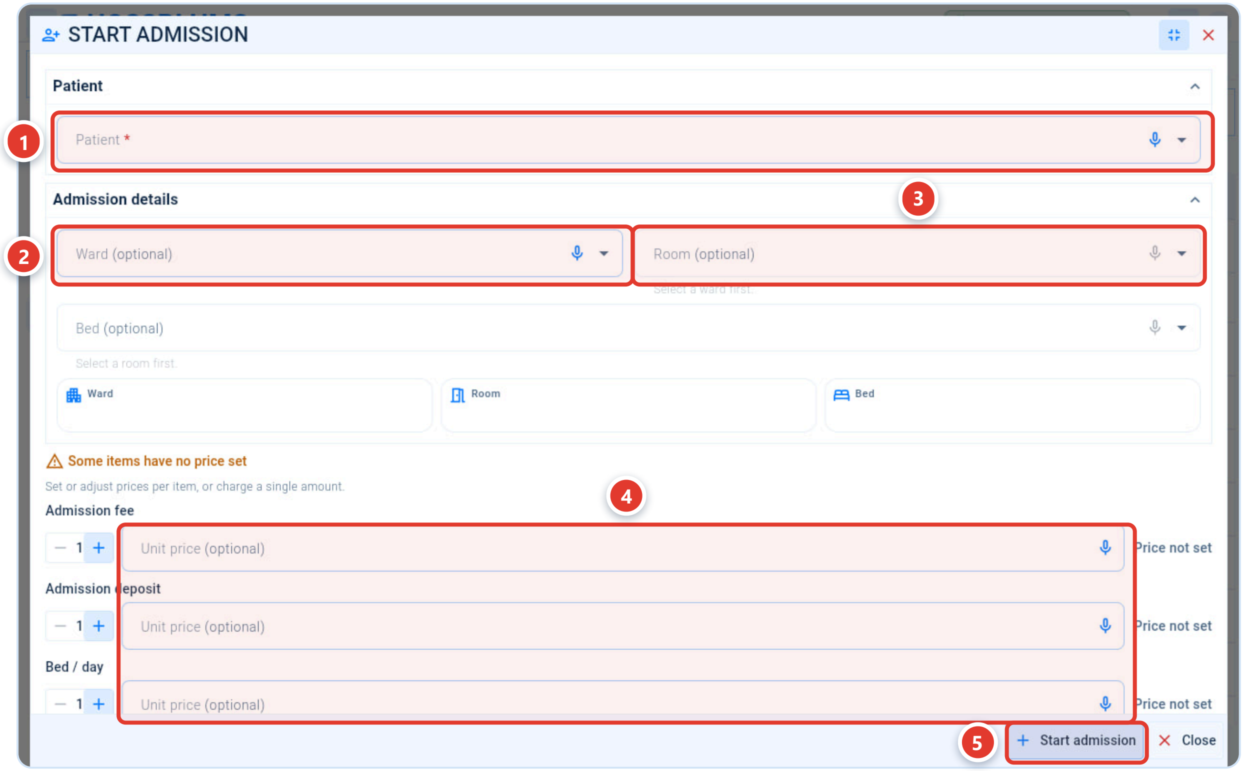

Figure 14.2. Start admission.

1. Search for and select the **Patient**.
2. Choose the **Ward**.
3. Choose the **Room**, then the **Bed**. Each list becomes available once you have chosen the one before it.
4. Check the admission charges, such as the **Admission fee**, **Admission deposit** and **Bed / day**. Where a price is not set, enter a **Unit price**, and change the quantity if needed.
5. Select **Start admission**.

14.3 Work with an admission

Who: Doctors, nurses and ward staff

On the **Active Patients** tab, select a patient to open their admission.

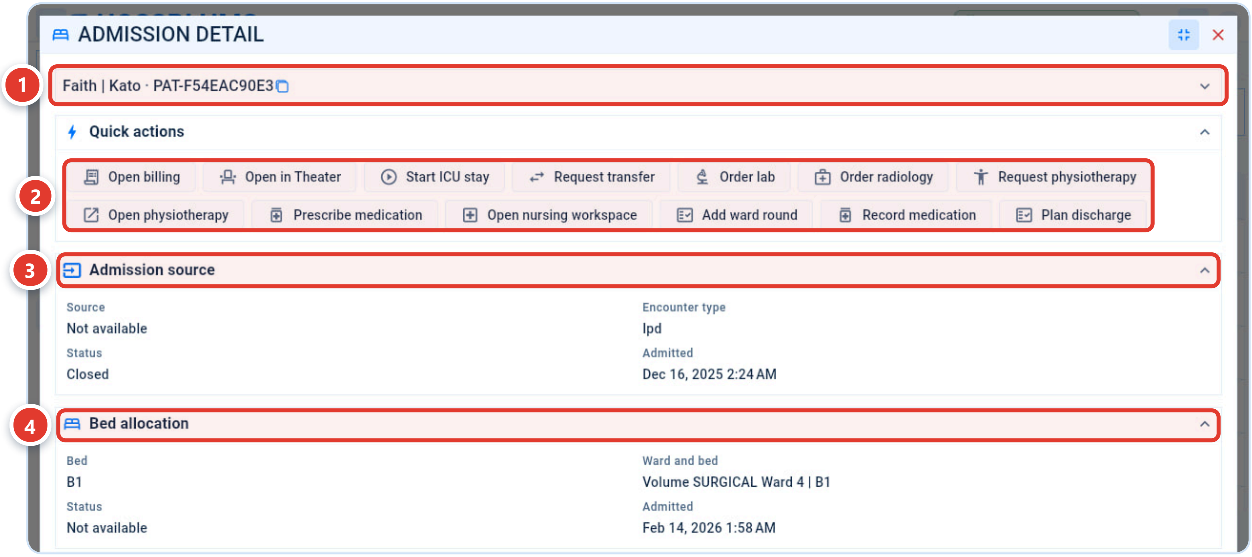

Figure 14.3. An admission record.

1. The patient's name and ID. Select the bar to see their details.
2. **Quick actions** cover the stay, for example **Open billing**, **Start ICU stay**, **Request transfer**, **Order lab**, **Order radiology**, **Prescribe medication**, **Open nursing workspace**, **Add ward round**, **Record medication** and **Plan discharge**.
3. **Admission source** shows the encounter the patient was admitted from, and when.
4. **Bed allocation** shows the ward and bed, and when they were allocated.
5. **Insurance authorization** shows the amount the insurer approved, how much has been used and how much remains. Select **Request authorization** to ask for more.

Further down are **Transfers**, **Ward rounds**, **Nursing notes**, **Medication**, **Discharge** and the **Timeline** of the stay.

Nursing

See the patients and tasks on your ward, record observations and notes, and complete the nursing checks on admission and discharge.

15.1 The nursing worklist

Who: Nurses

Select **Nursing** in the menu.

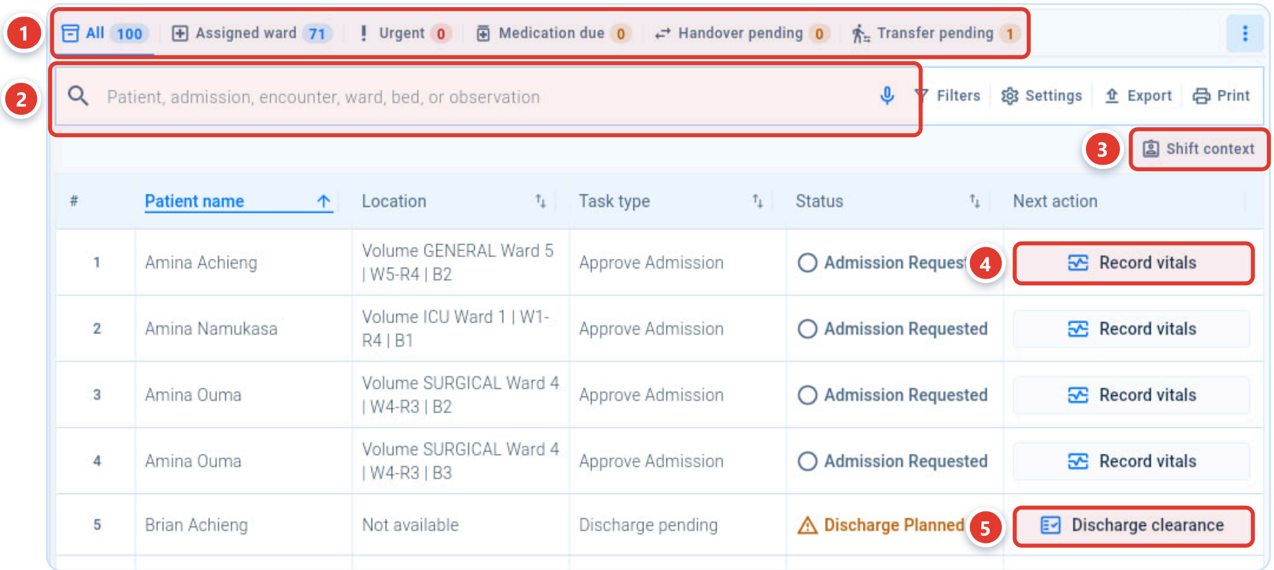

Figure 15.1. The nursing worklist.

1. Choose a tab: **All**, **Assigned ward**, **Urgent**, **Medication due**, **Handover pending** or **Transfer pending**.
2. Search by patient, admission, encounter, ward, bed or observation.
3. **Shift context** shows the roster assignments and pending handovers for your shift.
4. Each row shows the patient's next nursing task. **Record vitals** opens the vital signs form described in Record triage and vital signs.
5. **Discharge clearance** opens the nursing checks before a patient goes home. See Complete nursing discharge clearance. **Acknowledge transfer** confirms a patient transferred to your ward.

15.2 Care for a ward patient

Who: Nurses

Select a patient on the worklist.

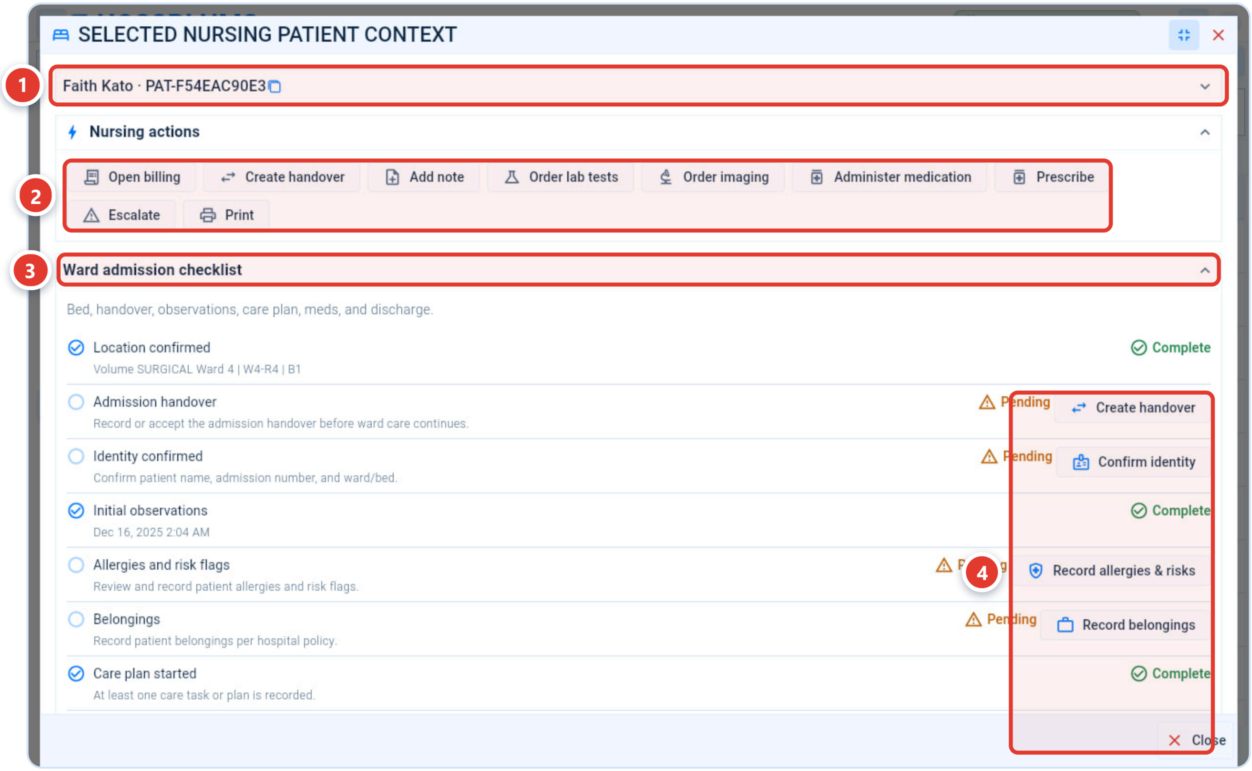

Figure 15.2. A patient in the nursing workspace.

1. The patient's name and ID. Select the bar to see their details.
2. **Nursing actions**: **Open billing**, **Create handover**, **Add note**, **Order lab tests**, **Order imaging**, **Administer medication**, **Prescribe**, **Escalate** and **Print**.
3. The **Ward admission checklist** lists what must be done when a patient arrives on the ward: the bed, handover, observations, care plan, medicines and discharge.
4. Each item shows **Complete** or **Pending**. Complete a pending item with its button, such as **Create handover**, **Confirm identity**, **Record allergies & risks**, **Record belongings** or **Notify doctor**.

Scroll down for **Billing clearance**, **Observations** (select **Edit vitals** to record new ones), **Medications** and **Nursing notes**.

15.3 Complete nursing discharge clearance

Who: Nurses

Select **Discharge clearance** on the patient's row.

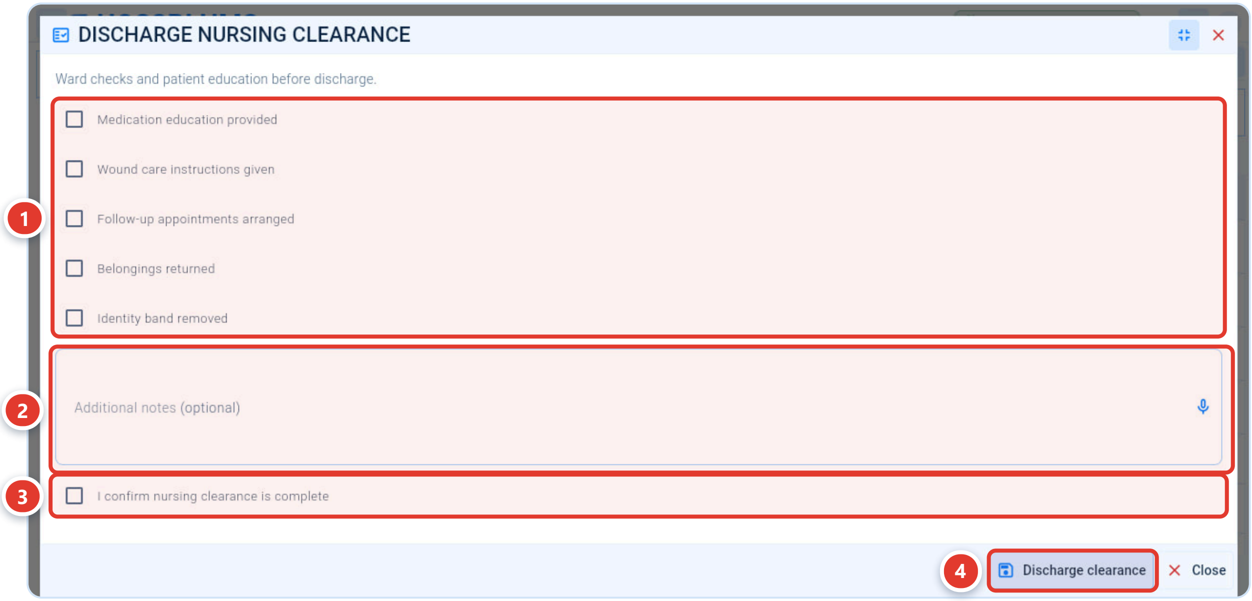

Figure 15.3. Nursing discharge clearance.

1. Tick each check as you complete it: **Medication education provided**, **Wound care instructions given**, **Follow-up appointments arranged**, **Belongings returned** and **Identity band removed**.
2. Add **Additional notes**, if needed.
3. Tick **I confirm nursing clearance is complete**.
4. Select **Discharge clearance**.

CHAPTER 16

Intensive care (ICU)

Follow critically ill patients closely: alerts, intensive observations, ICU rounds, transfers and the end of the ICU stay.

16.1 The ICU worklist

Who: ICU staff

Select **Intensive care (ICU)** in the menu. A patient joins the ICU worklist when **Start ICU stay** is selected on their admission.

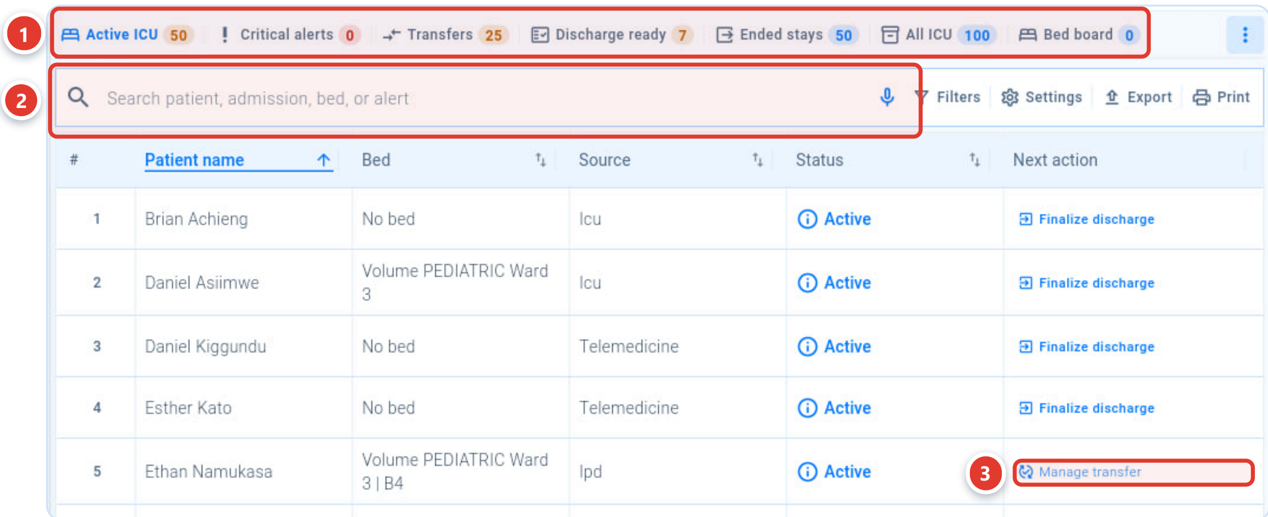

Figure 16.1. The ICU worklist.

1. Choose a tab: **Active ICU**, **Critical alerts**, **Transfers**, **Discharge ready**, **Ended stays**, **All ICU** or **Bed board**.
2. Search by patient, admission, bed or alert.
3. Each row shows the next action, such as **Finalize discharge**, or **Manage transfer** to approve or cancel a transfer.

16.2 Manage an ICU stay

Who: ICU staff

Select a patient on the worklist.

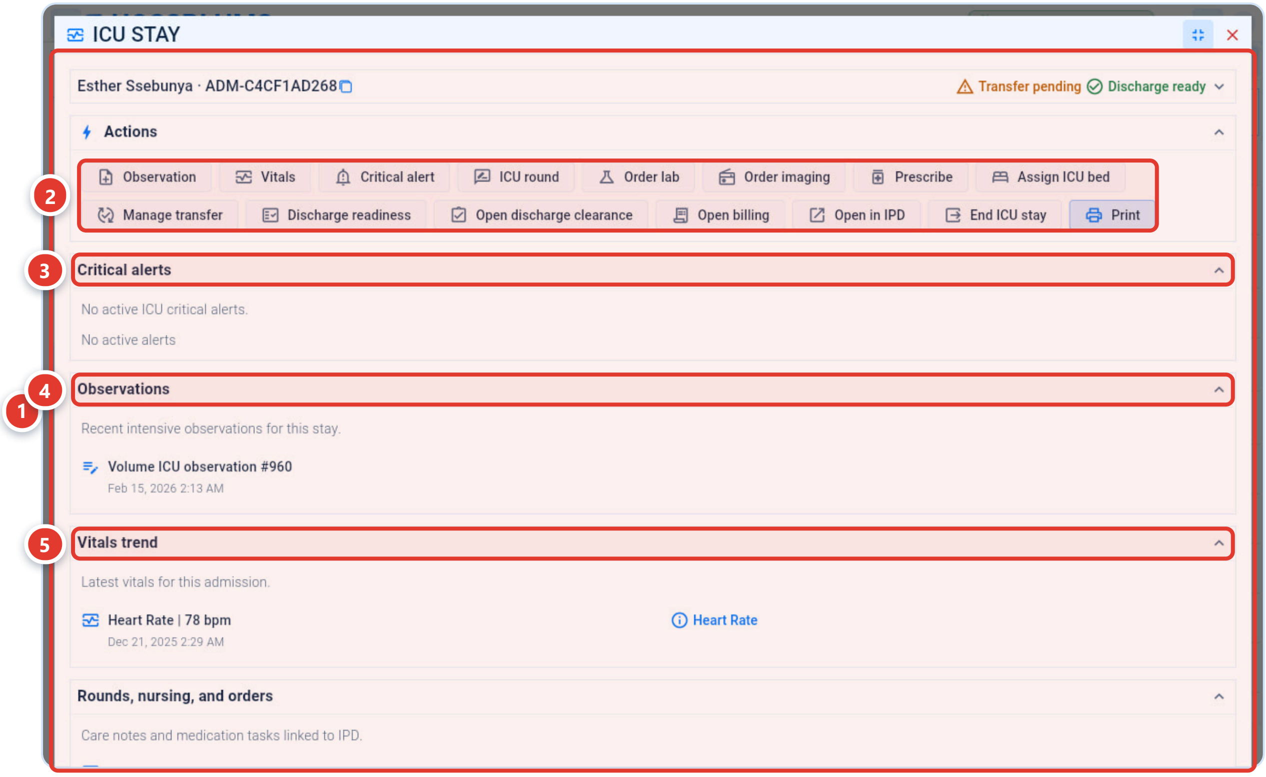

Figure 16.2. An ICU stay.

1. The patient and admission. Badges such as **Transfer pending** or **Discharge ready** show where the stay stands.
2. **Actions**: **Observation**, **Vitals**, **Critical alert**, **ICU round**, **Order lab**, **Order imaging**, **Prescribe**, **Assign ICU bed**, **Manage transfer**, **Discharge readiness**, **Open discharge clearance**, **Open billing**, **Open in IPD**, **End ICU stay** and **Print**.
3. **Critical alerts** lists the patient's active alerts. Select **Critical alert** to raise one.
4. **Observations** shows the recent intensive observations.
5. **Vitals trend** shows the latest vital signs for the admission.

Further down, **Rounds, nursing, and orders** and **Transfer and readiness** show care notes, medication tasks, bed movements and the planned discharge.

CHAPTER 17

Operating theatre

Schedule theatre cases, prepare the team and the patient, and record anaesthesia, the operation and recovery.

17.1 The theatre worklist

Who: Theatre staff and surgeons

Select **Operating theater** in the menu.

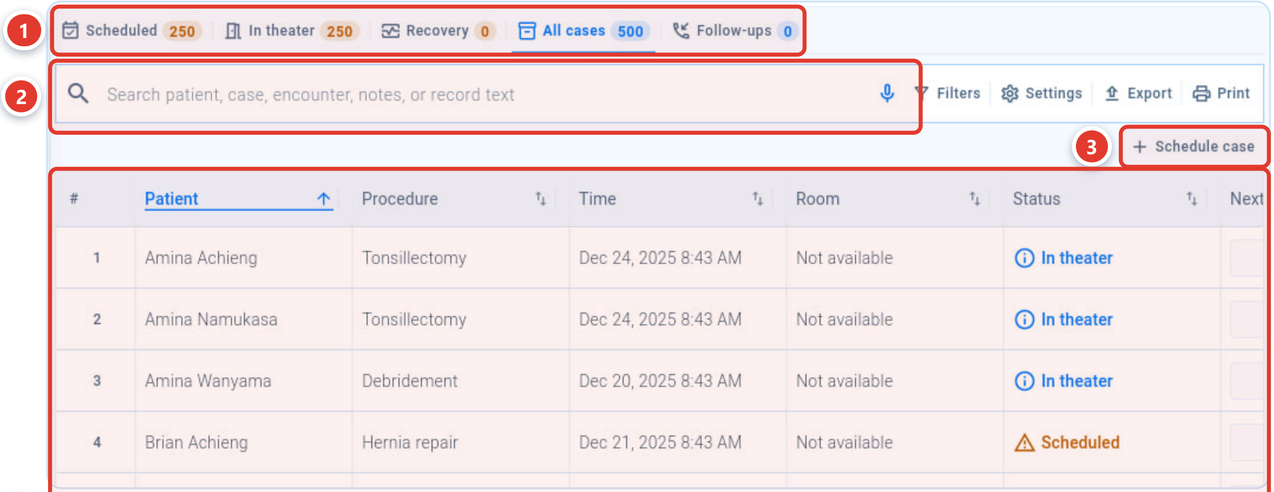

Figure 17.1. The theatre worklist.

1. Choose a tab: **Scheduled**, **In theater**, **Recovery**, **All cases** or **Follow-ups**.
2. Search by patient, case, encounter, notes or record text.
3. **Schedule case** books an operation. See Schedule a theatre case.
4. Each case shows the patient, procedure, time, room and status. Select a case to open it.

17.2 Schedule a theatre case

Who: Theatre staff and surgeons

Select **Schedule case**. You can also start from a patient record with **Schedule theater procedure**.

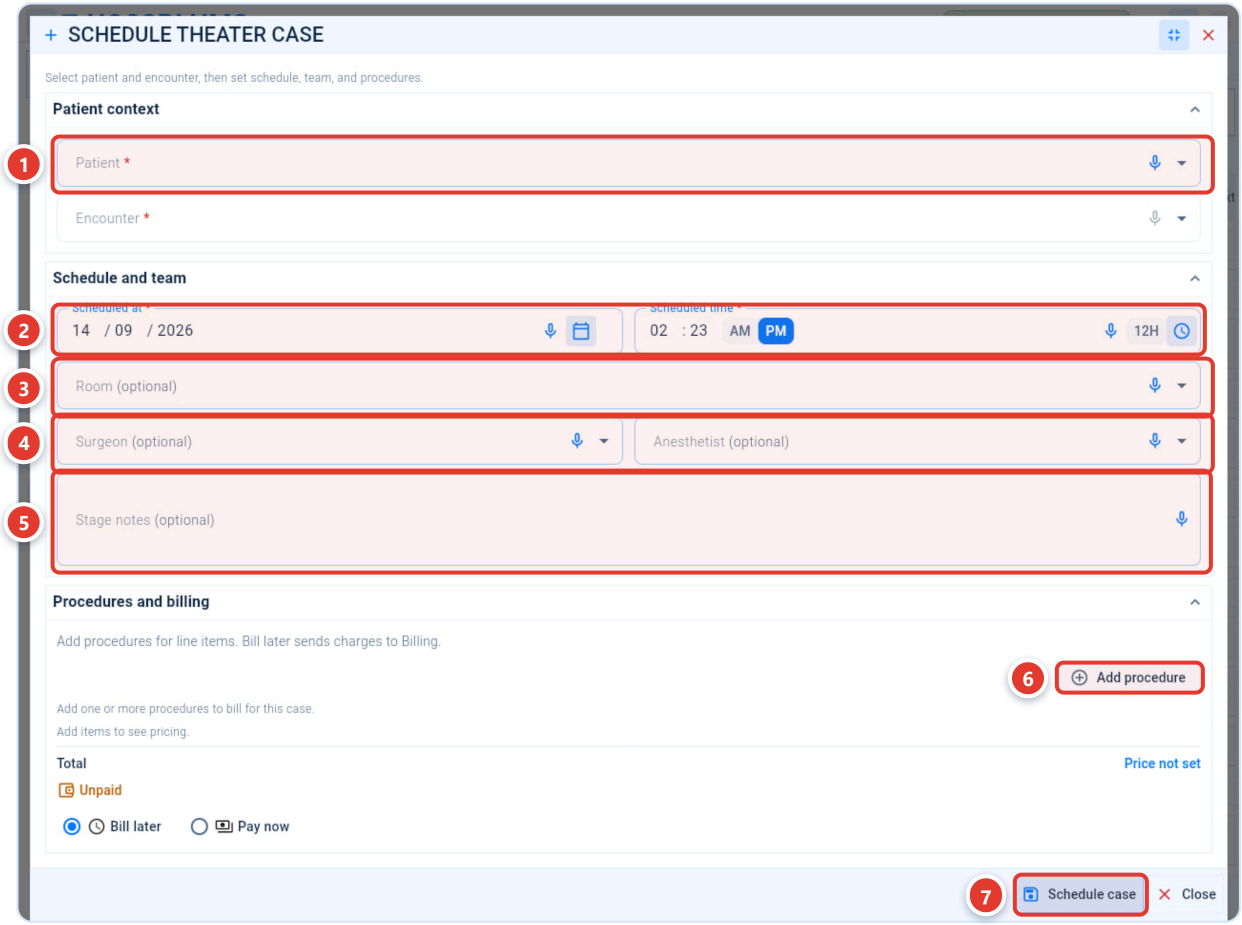

Figure 17.2. Schedule case.

1. Select the **Patient** and the **Encounter** the operation belongs to.
2. Set the date in **Scheduled at** and the **Scheduled time**.
3. Choose the theatre **Room**.
4. Choose the **Surgeon** and the **Anesthetist**.
5. Add **Stage notes**, if needed.
6. Select **Add procedure** for each procedure to be performed. The charges are totalled below: choose **Bill later** to send them to Billing, or **Pay now**.
7. Select **Schedule case**.

17.3 Manage a theatre case

Who: Theatre staff and surgeons

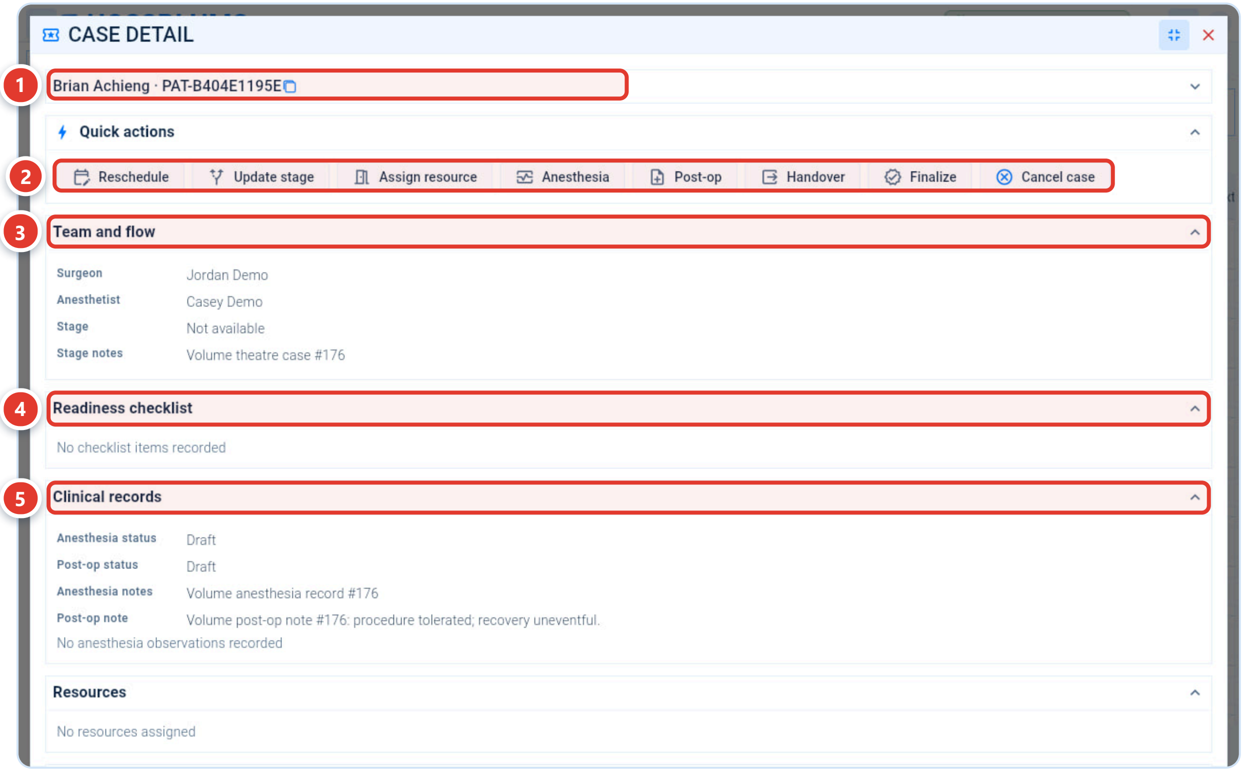

Figure 17.3. A theatre case.

1. The patient and the case.
2. **Quick actions** follow the operation: **Reschedule**, **Update stage**, **Assign resource**, **Anesthesia**, **Post-op**, **Handover**, **Finalize** and **Cancel case**.
3. **Team and flow** shows the **Surgeon**, the **Anesthetist**, the current **Stage** and the **Stage notes**.
4. **Readiness checklist** records the checks before the operation.
5. **Clinical records** shows the status and notes of the anaesthesia record and the post-operative note, and any anaesthesia observations.

Further down, **Resources** lists what has been assigned to the case, and the **Timeline** records each step.

CHAPTER 18

Discharge planning

Plan each patient's discharge, make sure every department has cleared them, and close the admission.

18.1 The discharge worklist

Who: Doctors, nurses and ward managers

Select **Discharge planning** in the menu.

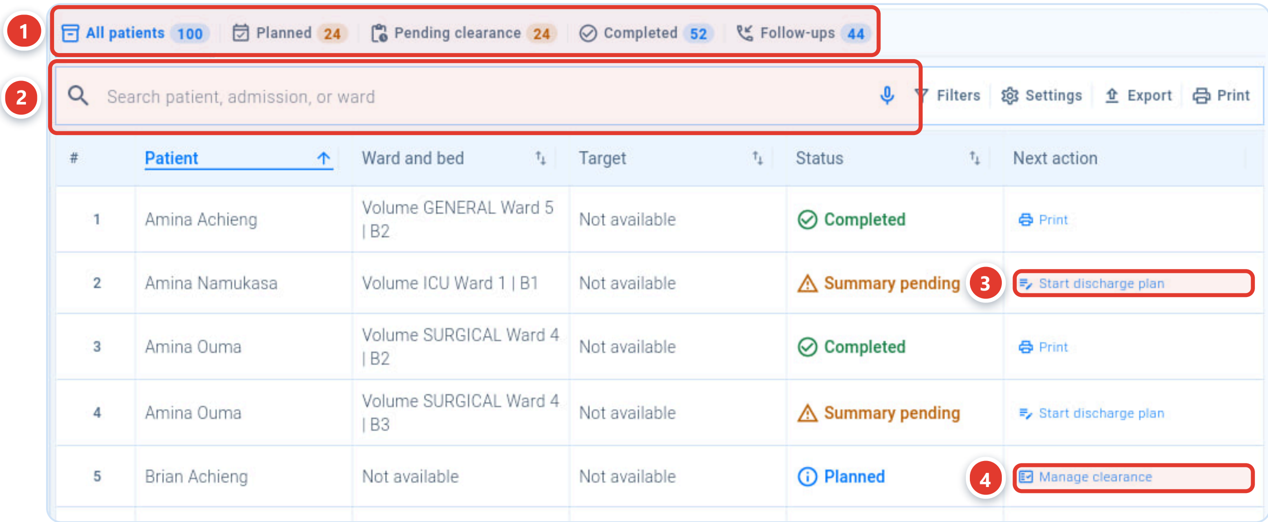

Figure 18.1. The discharge worklist.

1. Choose a tab: **All patients**, **Planned**, **Pending clearance**, **Completed** or **Follow-ups**.
2. Search by patient, admission or ward.
3. For a patient whose status is **Summary pending**, select **Start discharge plan**. See Start a discharge plan.
4. For a patient whose discharge is **Planned**, select **Manage clearance**. See Finalize a discharge.

Select a patient on the worklist to open billing or the pharmacy for them, request take-home medicines with **Request medicines**, or print their discharge papers.

18.2 Start a discharge plan

Who: Doctors

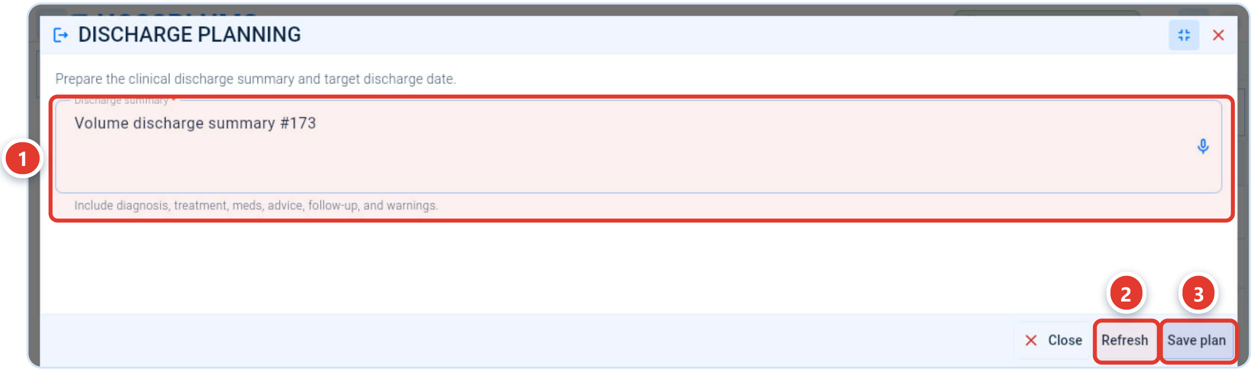

Figure 18.2. Starting a discharge plan.

1. Write the **Discharge summary**: the diagnosis, treatment, medicines, advice, follow-up and warning signs to look out for.
2. Select **Refresh** to load the latest information about the admission.
3. Select **Save plan**.

18.3 Finalize a discharge

Who: Doctors and ward managers

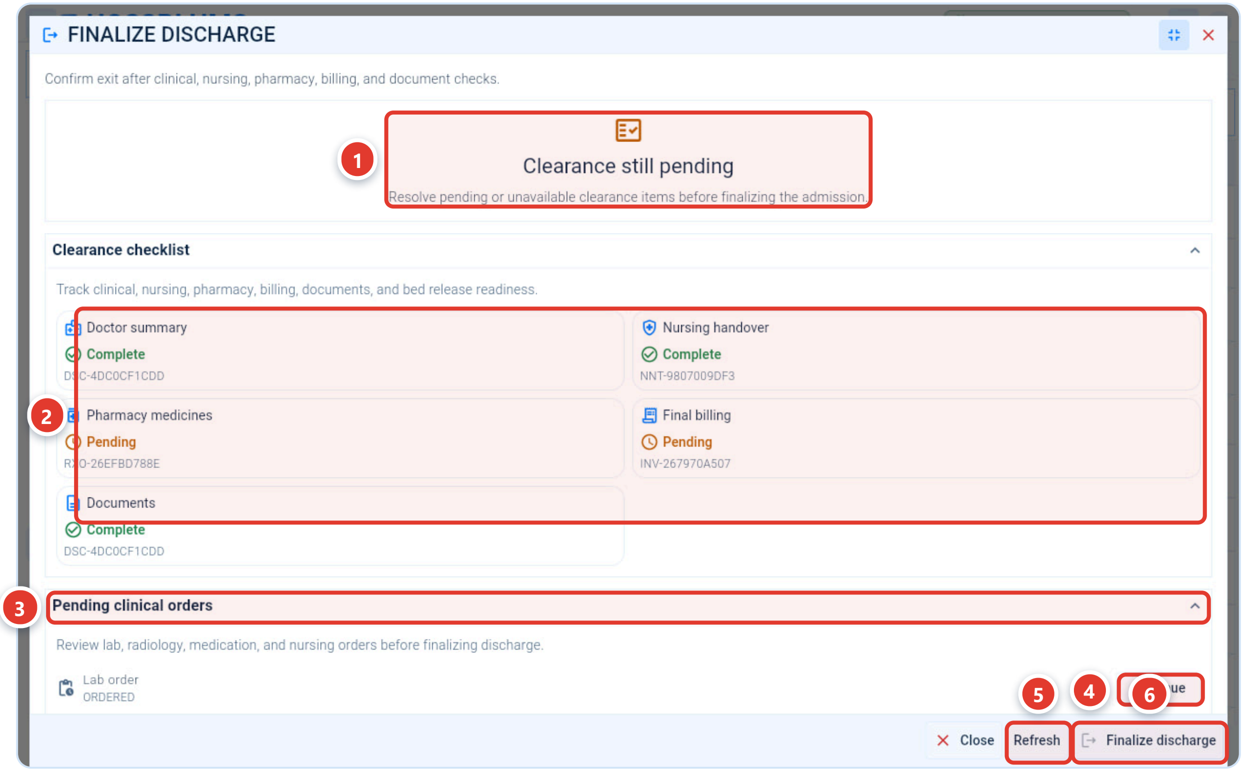

Figure 18.3. Finalize discharge.

1. The status at the top shows whether anything still stops the discharge, for example **Clearance still pending**.
2. The **Clearance checklist** tracks each department: **Doctor summary**, **Nursing handover**, **Pharmacy medicines**, **Final billing**, **Documents** and, for insured patients, **Insurance clearance**. Each one shows **Complete** or **Pending**.
3. **Pending clinical orders** lists laboratory, radiology, medication and nursing orders that are still open.
4. Select **Continue** on an order to deal with it.
5. Select **Refresh** once other departments have completed their part.
6. When every item is complete, select **Finalize discharge**.

CHAPTER 19

Billing

Charge for services, issue invoices, take payments and refunds, and keep the price book up to date.

19.1 The billing worklist

Who: Billing officers and cashiers

Select **Billing** in the menu. Charges for consultations, orders, admissions and procedures reach Billing from the departments, so you only add charges by hand for anything else.

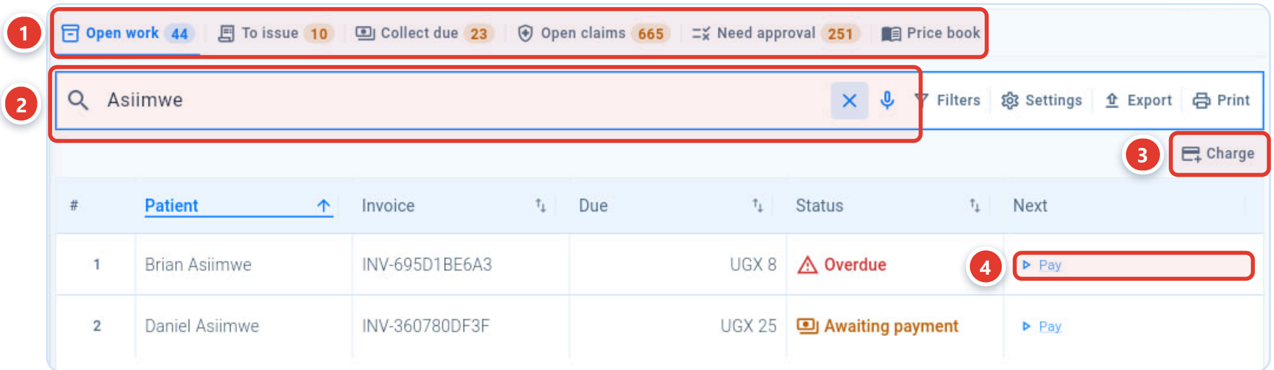

Figure 19.1. The billing worklist, searched for a patient.

1. Choose a tab: **Open work** for everything that needs action, **To issue** for draft invoices, **Collect due** for balances to collect, **Open claims**, **Need approval** for refunds, voids and adjustments, or **Price book**.
2. Search by patient, invoice or encounter.
3. **Charge** adds a charge by hand. See Charge a patient.
4. Each invoice shows its next step, such as **Pay** to take a payment, **Issue** to issue a draft invoice, or **Refund**.

19.2 Charge a patient

Who: Billing officers and cashiers

Select **Charge**.

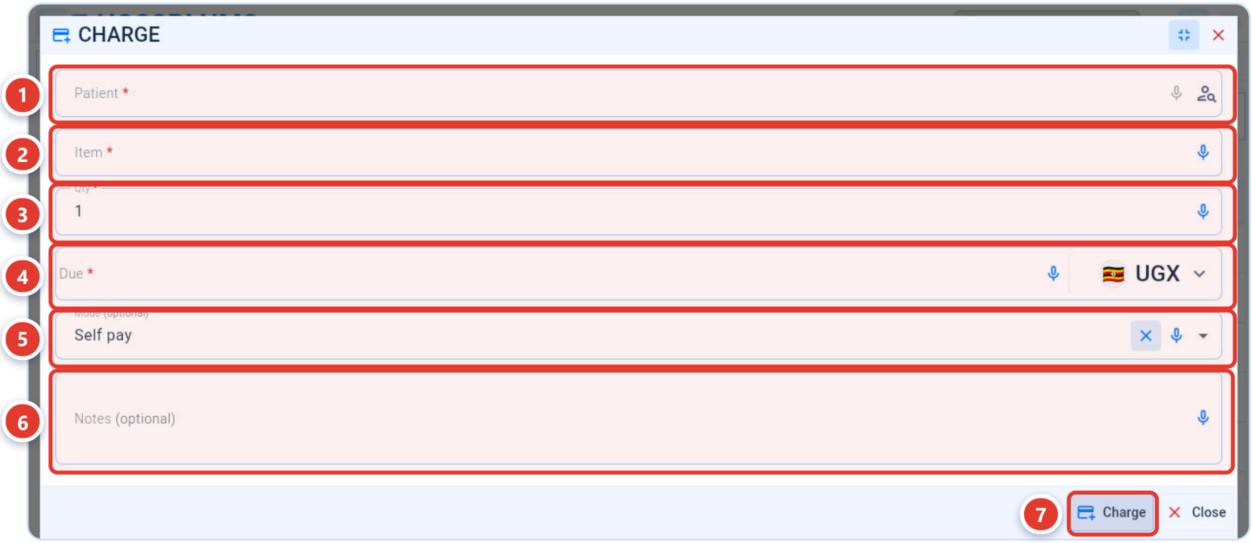

Figure 19.2. Charge.

1. Select the **Patient**.
2. Choose the **Item** or service.
3. Enter the quantity in **Qty**.
4. Check the amount **Due** and its currency.
5. Choose the payment **Mode**, such as self-pay or insurance.
6. Add **Notes**, if needed.
7. Select **Charge**.

19.3 Take a payment

Who: Cashiers

On the **Collect due** tab, select **Pay** on the invoice.

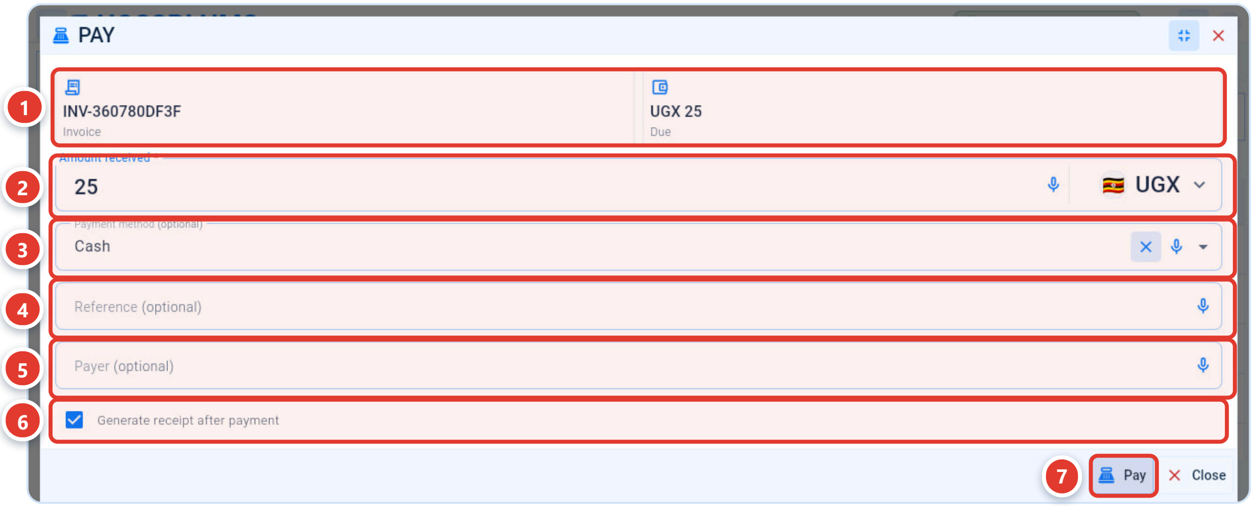

Figure 19.3. Pay.

1. Check the **Invoice** number and the amount **Due**.
2. Enter the **Amount received** and check the currency.

3. Choose the **Payment method**.
4. Enter the payment **Reference**, such as a mobile money transaction ID.
5. Enter the **Payer** if someone other than the patient is paying.
6. Keep **Generate receipt after payment** ticked to produce a receipt.
7. Select **Pay**.

19.4 Work with an invoice

Who: Billing officers and cashiers

Select an invoice on the worklist to open it.

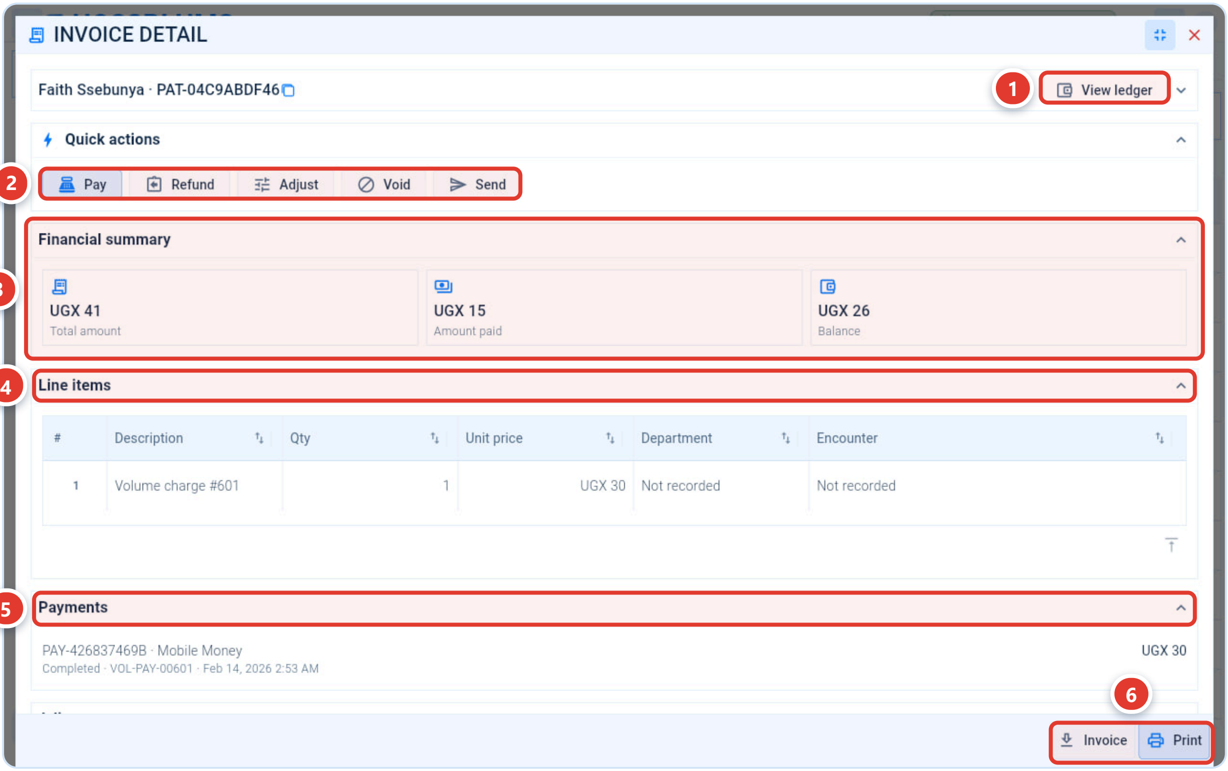

Figure 19.4. An invoice.

1. **View ledger** shows all of the patient's invoices and payments.
2. **Quick actions**: **Pay**, **Refund**, **Adjust**, **Void** and **Send**. Refunds, voids and adjustments wait under **Need approval** until they are approved.
3. **Financial summary** shows the **Total amount**, **Amount paid** and **Balance**.
4. **Line items** lists what was charged, with the quantity, unit price, department and encounter.
5. **Payments** lists each payment with its reference and method.
6. Select **Invoice** to download the invoice as a PDF, or **Print** to print it with its line items and payments.

19.5 Keep prices up to date

Who: Billing managers

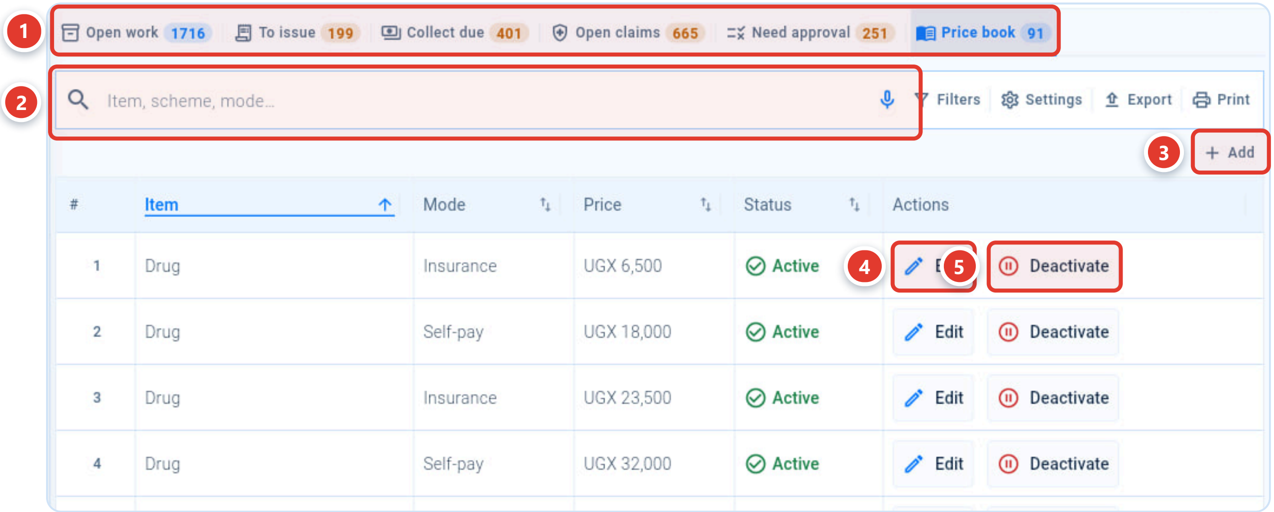

Figure 19.5. The price book.

1. Open the **Price book** tab. It holds the prices used when services and items are charged.
2. Search by item, scheme or mode.
3. Select **Add** to set a price for an item or service.
4. Select **Edit** to change a price.
5. Select **Deactivate** to stop using a price.

19.6 Close your shift

Who: Cashiers

At the end of your shift, open the **Collect due** tab and select **Close shift**. Enter the **Expected amount** and the **Actual amount** you collected, add **Notes** to explain any difference, tick **Submit for approval** if a supervisor must check the shift, and select **Close shift**.

CHAPTER 20

Insurance claims

Set up insurers and schemes, enrol patients, request pre-authorizations and follow claims until they are paid.

20.1 Set up insurance

Who: Claims officers and billing managers

Select **Insurance claims** in the menu, then **Insurance Setup**. If the tab is not visible, open **More tabs**.

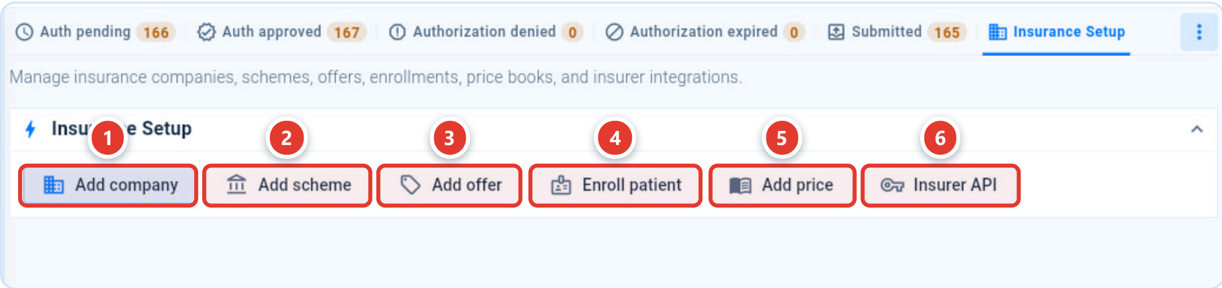

Figure 20.1. Insurance Setup.

1. **Add company** adds an insurance company.
2. **Add scheme** adds a scheme offered by a company.
3. **Add offer** records an offer made under a scheme.
4. **Enroll patient** registers a patient as a member of a scheme.
5. **Add price** sets the price an insurer pays for an item or service.
6. **Insurer API** connects HOSSPI HMS to an insurer's own system, where the insurer supports it.

You can also enrol a patient from their record: select **Enroll insurance** under **Quick actions**, choose the **Insurance company** and **Insurance scheme**, enter the patient's **Member ID** and select **Save enrollment**.

20.2 The claims worklist

Who: Claims officers

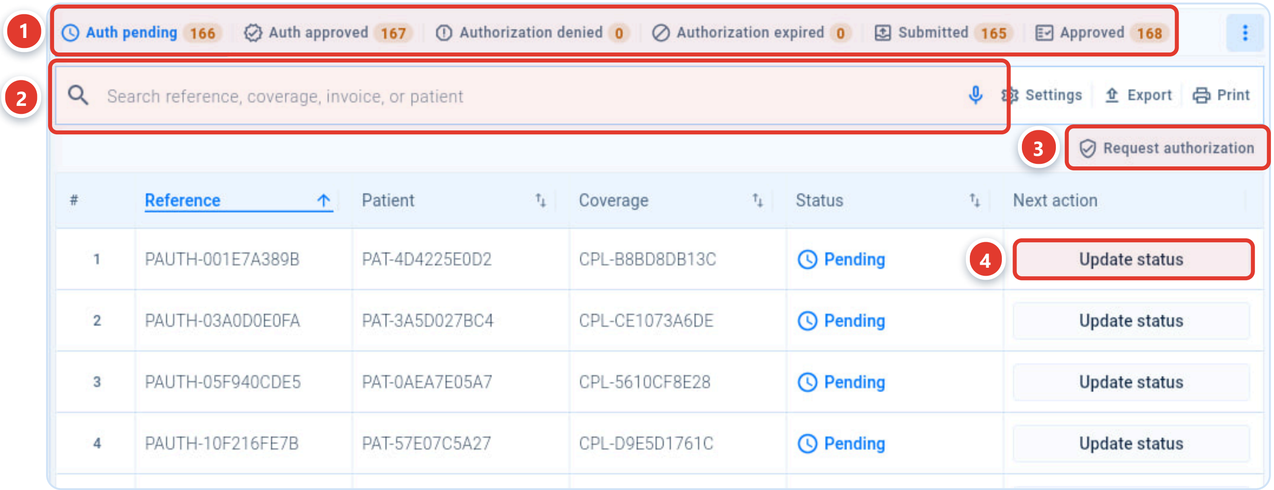

Figure 20.2. The claims worklist.

1. Choose a tab: **Auth pending**, **Auth approved**, **Authorization denied**, **Authorization expired**, **Submitted** or **Approved**. **More tabs** holds the rest.
2. Search by reference, coverage, invoice or patient.
3. **Request authorization** asks an insurer to approve care before it is given. Choose the **Insurance company** and **Insurance scheme**, then select **Request authorization**.
4. Each claim shows its next step, such as **Record response**, **Update status** or **Close as paid**.

20.3 Record an insurer's response

Who: Claims officers

When the insurer replies, select **Record response** on the claim.

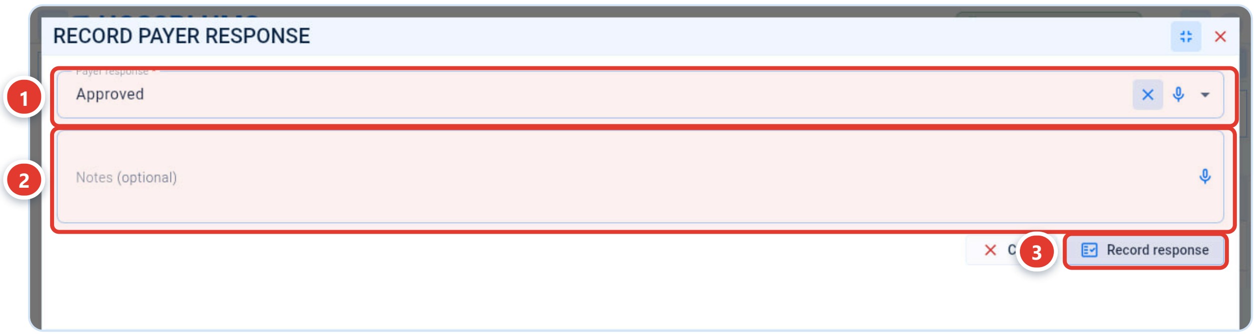

Figure 20.3. Record response.

1. Choose the **Payer response**.
2. Add **Notes**, such as the insurer's reference or reason.
3. Select **Record response**.

When the insurer pays an approved claim, select **Close as paid**.

CHAPTER 21

Accounts

Keep the facility's books: post journal entries, review ledgers and outgoing invoices, and set up the accounting calendar and controls.

21.1 The accounting books

Who: Accountants

Select **Accounts** in the menu, then **Books**.

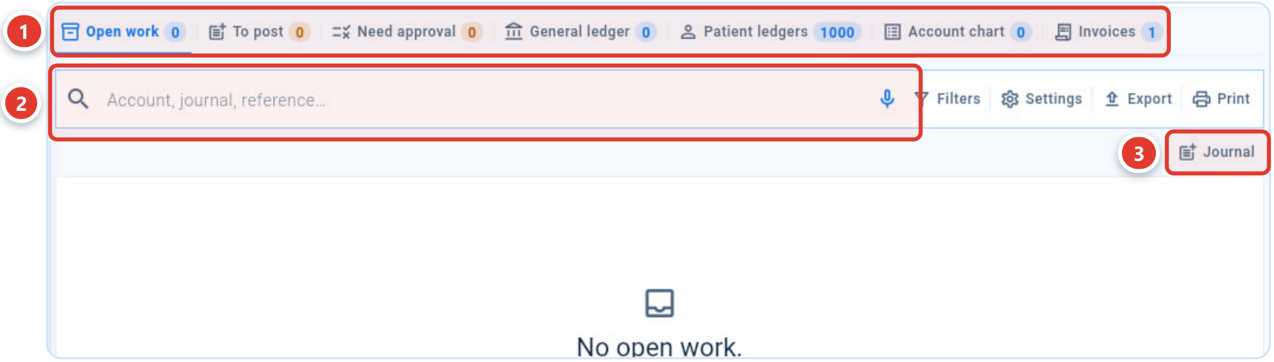

Figure 21.1. The accounting books.

1. The tabs cover the books, as described in the table below.
2. Search by account, journal or reference.
3. **Journal** starts a new journal entry. See Post a journal entry.

Tab	What it holds
Open work	Every accounting item that still needs action.
To post	Draft journal entries ready to post to the books. **Post all** posts them together.
Need approval	Journal posts, voids and reversals waiting for approval.
General ledger	The facility's account balances and activity by general ledger account.
Patient ledgers	What each patient has been invoiced, has paid and still owes. **Pay** takes you to Billing to receive a payment.
Account chart	The chart of accounts, with each account's code, type and status. **Add** creates an account.
Invoices	Invoices for money leaving the facility, such as supplier bills. **Create** adds one.

21.2 Post a journal entry

Who: Accountants

On the **Open work** tab, select **Journal**.

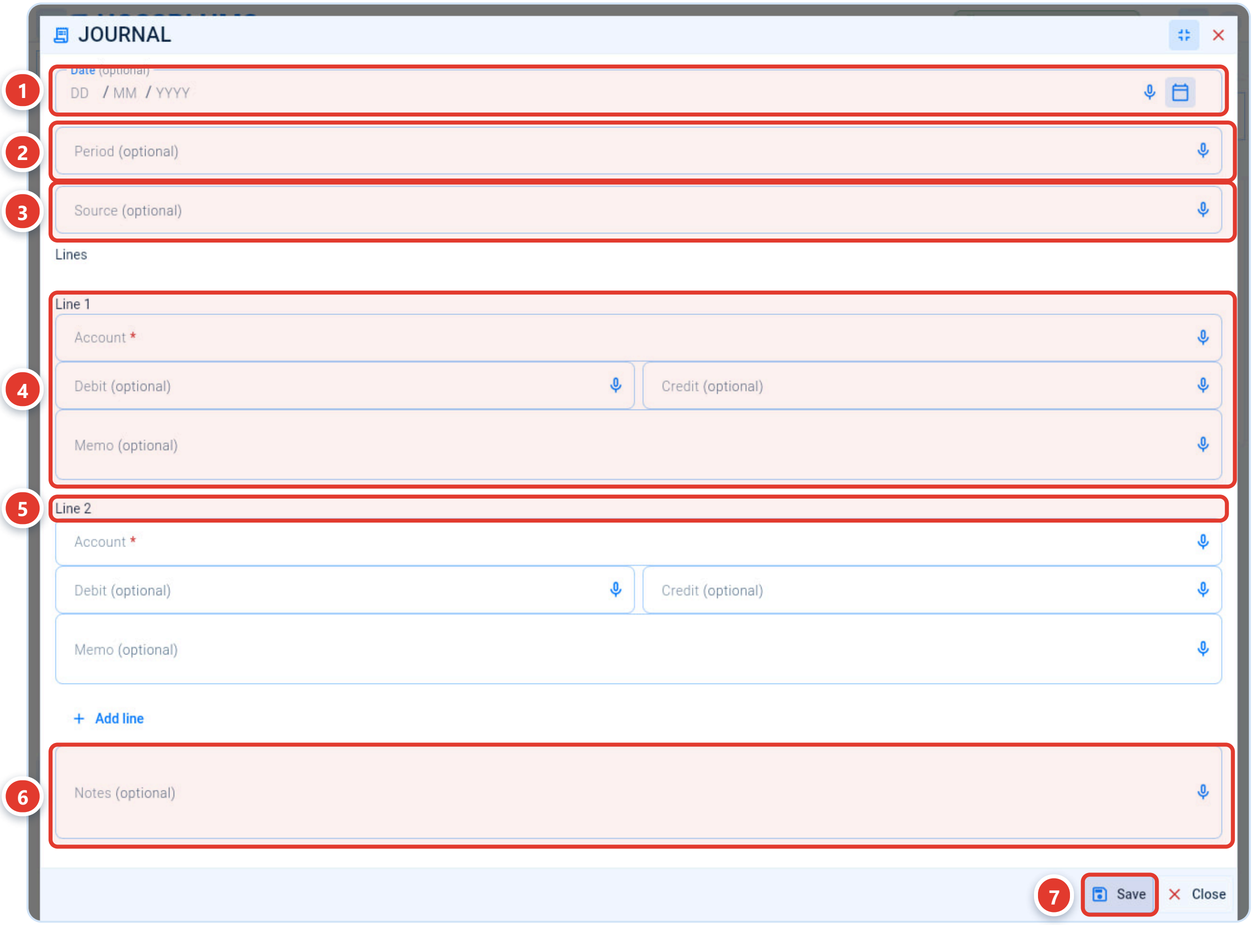

Figure 21.2. A new journal entry.

1. Set the **Date** of the entry.
2. Choose the accounting **Period**.
3. Enter the **Source**, such as the document the entry comes from.
4. On **Line 1**, choose the **Account** and enter either a **Debit** or a **Credit** amount, with a **Memo** if you wish.
5. Complete **Line 2** in the same way, and select **Add line** if you need more lines. Total debits must equal total credits.
6. Add **Notes**, if needed.
7. Select **Save**. The entry waits under **To post** until it is posted.

21.3 Accounting setup and controls

Who: Finance managers

Select **Accounts** in the menu, then **Setup & Controls**.

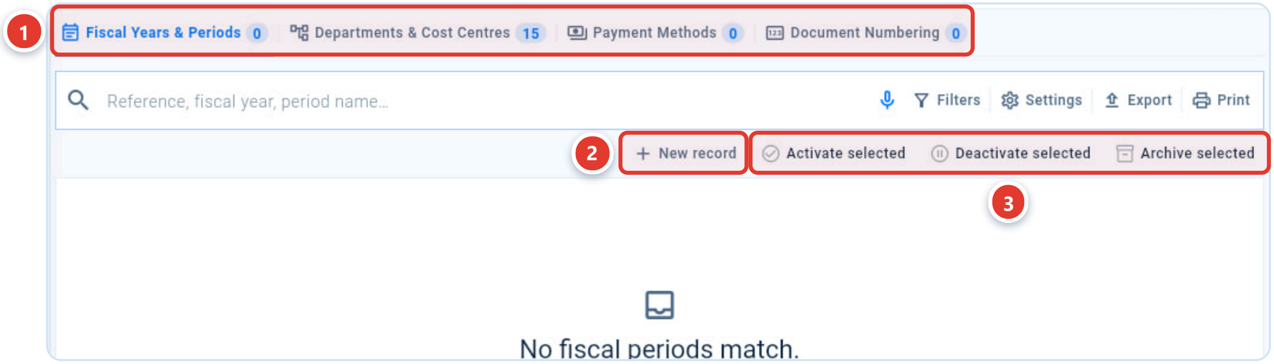

Figure 21.3. Setup & Controls.

1. Choose a tab, as described in the table below.
2. **New record** adds a record to the tab you are on.
3. Tick records in the list, then select **Activate selected**, **Deactivate selected** or **Archive selected**.

Tab	What it holds
Fiscal Years & Periods	The fiscal calendar, and when each period opens, closes and is locked.
Departments & Cost Centres	Departments with their cost centres, default posting accounts and owners.
Payment Methods	The payment methods you accept, with their settlement accounts, fees and evidence rules.
Document Numbering	The prefixes, padding and reset rules for the reference numbers each kind of document uses.

CHAPTER 22

Human resources

Keep staff records up to date, plan rosters, handle leave and run payroll.

22.1 Staff records

Who: HR staff and managers

Select **Human resources** in the menu.

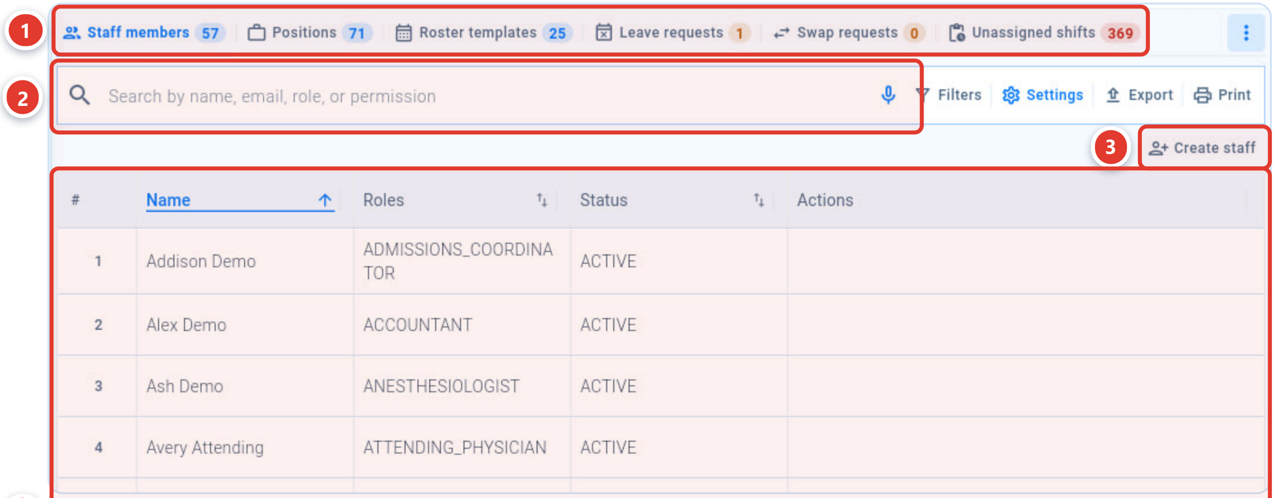

Figure 22.1. Human resources, showing staff members.

1. Choose a tab: **Staff members**, **Positions**, **Roster templates**, **Leave requests**, **Swap requests** or **Unassigned shifts**. **More tabs** holds **Pay & Compensation** and **Manage staff and roles**.
2. Search by name, email, role or permission.
3. **Create staff** adds a staff account, as described in Create a staff account.
4. Select a staff member to open their profile.

To add a job title, open the **Positions** tab and select **Create Position**. Enter the **Position** and, if you wish, a **Description**, keep **Active** ticked, and select **Create Position**.

22.2 A staff profile

Who: HR staff and managers

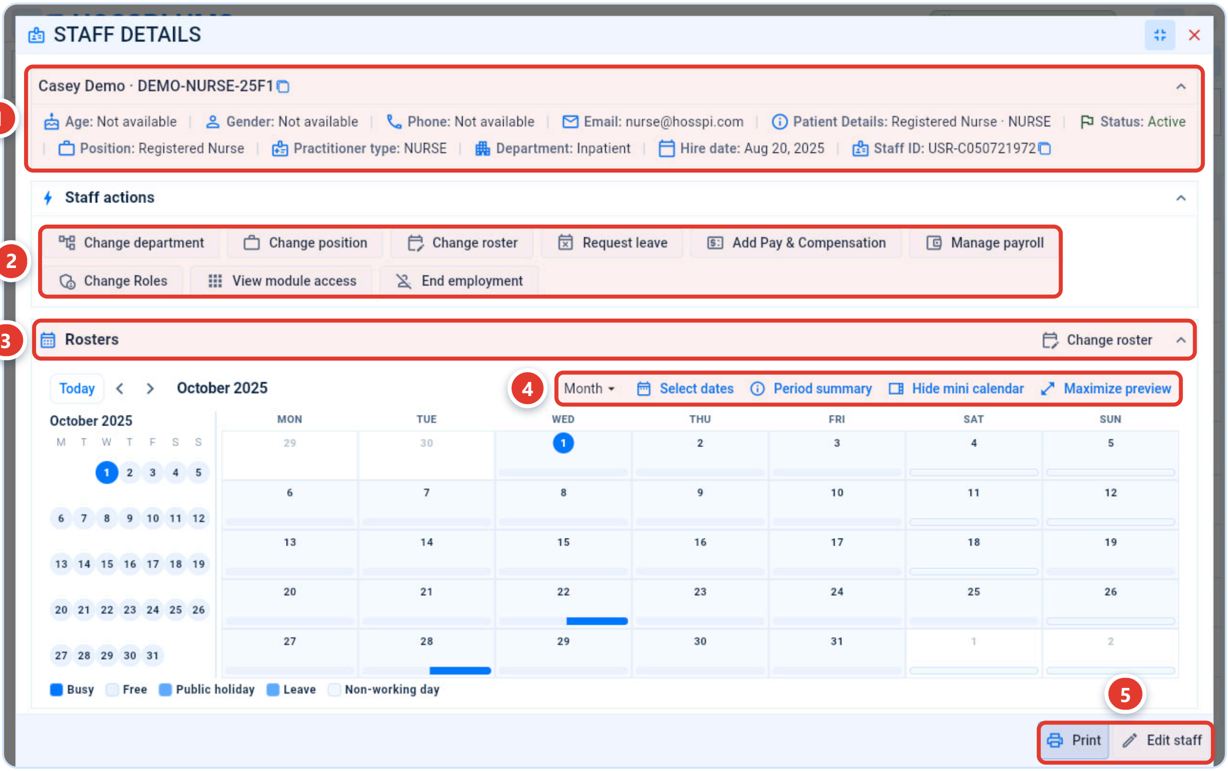

Figure 22.2. A staff profile.

1. **Staff details**: the person's name, staff number, staff ID and other details.
2. **Staff actions**: **Change department**, **Change position**, **Change roster**, **Request leave**, **Add Pay & Compensation**, **Manage payroll**, **Change Roles**, **View module access** and **End employment**, which records that the person has left and can also end their access.
3. **Rosters** shows the person's shifts on a calendar. Select **Change roster** to change them.
4. Change the calendar with **Month**, **Select dates**, **Period summary**, **Hide mini calendar** and **Maximize preview**. The key below it marks busy, free, leave, public holiday and non-working days.
5. Select **Edit staff** to change the person's details, or **Print** to print the profile.

Further down are **Leaves**, **Payroll**, **Roles and access** (select **Change Roles**) and **Permissions** (select **Manage staff permissions**).

22.3 Plan rosters

Who: HR staff and managers

Open the **Roster templates** tab and select **Create roster template**.

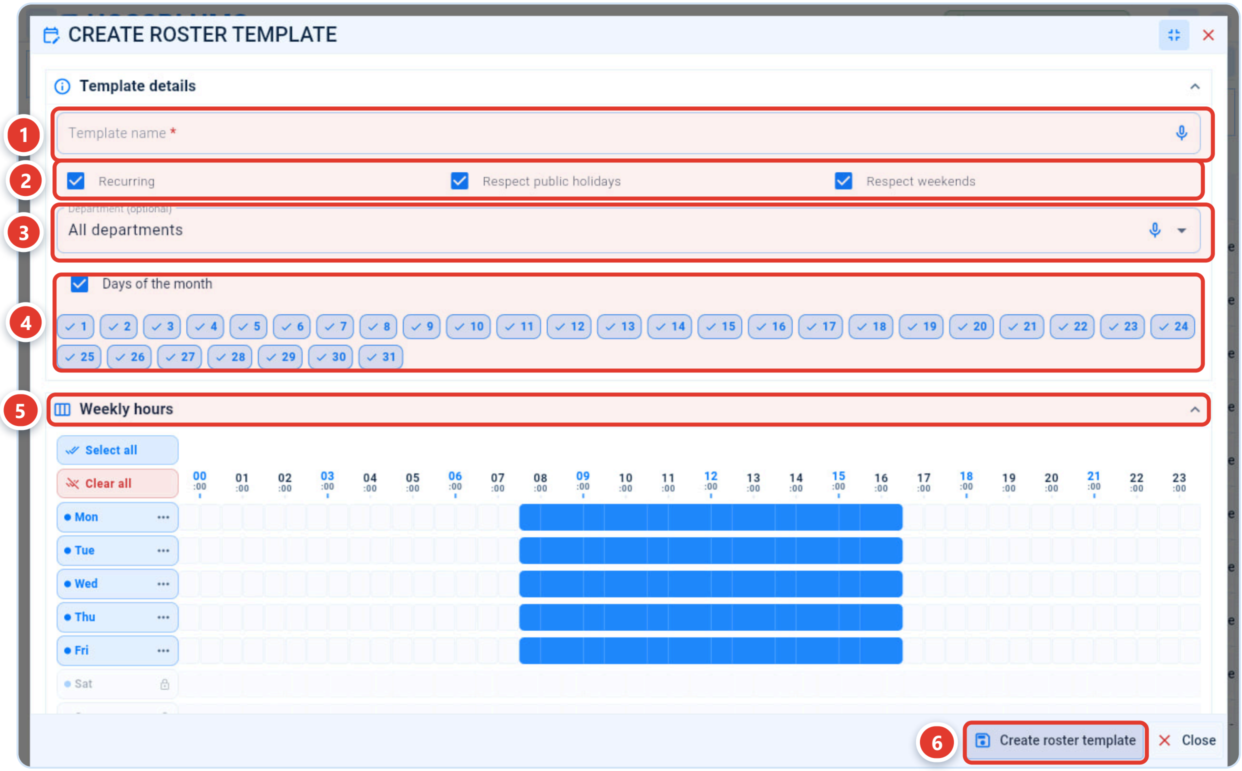

Figure 22.3. Create roster template.

1. Enter the **Template name**.
2. Choose the rules that apply: **Recurring**, **Respect public holidays** and **Respect weekends**.
3. Choose the **Department**, if the template is for one department.
4. Keep **Days of the month** ticked and select the days the template covers.
5. Under **Weekly hours**, mark the working hours for each day of the week. **Select all** and **Clear all** speed this up.
6. Select **Create roster template**.

Unassigned shifts lists shifts that nobody has been given yet; select **Override shift** to change one. **Swap requests** lists requests from staff to swap shifts.

22.4 Manage leave

Who: HR staff and managers

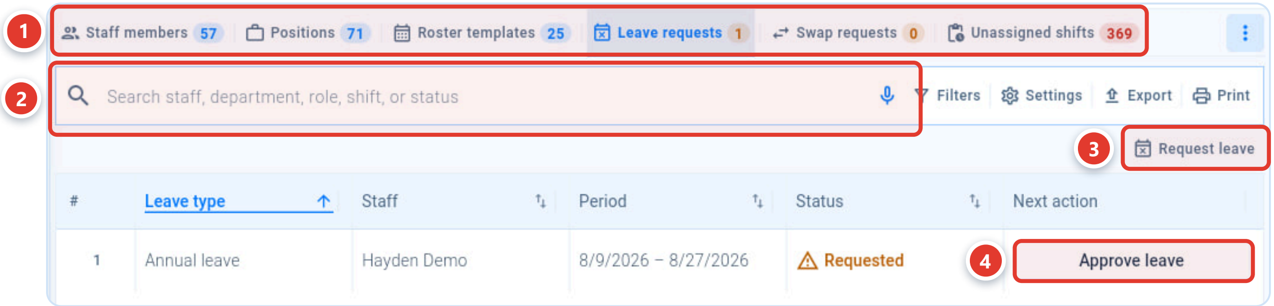

Figure 22.4. Leave requests.

1. Open the **Leave requests** tab.
2. Search by staff, department, role, shift or status.
3. Select **Request leave** to record leave for a staff member.
4. Select a request to see its details, then **Approve leave** to approve it.

Staff can also ask for leave themselves. See Request leave.

22.5 Run payroll

Who: HR and finance staff

Open **More tabs**, then **Pay & Compensation**.

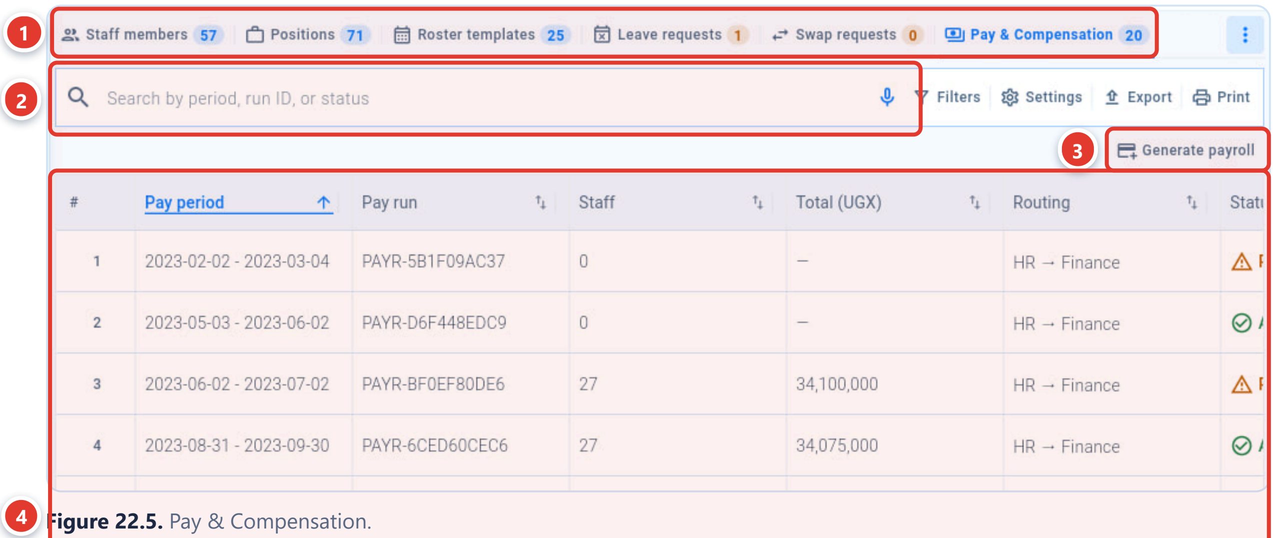

Figure 22.5. Pay & Compensation.

1. The **Pay & Compensation** tab lists each pay run.
2. Search by period, run ID or status.
3. Select **Generate payroll** to prepare the pay run for a period.
4. Each pay run shows its **Pay period**, the number of staff, the **Total (UGX)**, its **Routing** from HR to Finance and its status, such as **Pending review** or **Approved — Finance**. Select a pay run to review it.

NOTE

Set each person’s salary and deductions from their profile, with **Add Pay & Compensation** and **Manage payroll**.

CHAPTER 23

Reporting and analytics

Track how the facility is doing with ready-made reports, dashboards and KPIs, and review the audit and access logs.

23.1 The reporting overview

Who: Managers and administrators

Select **Reporting and Analytics** in the menu.

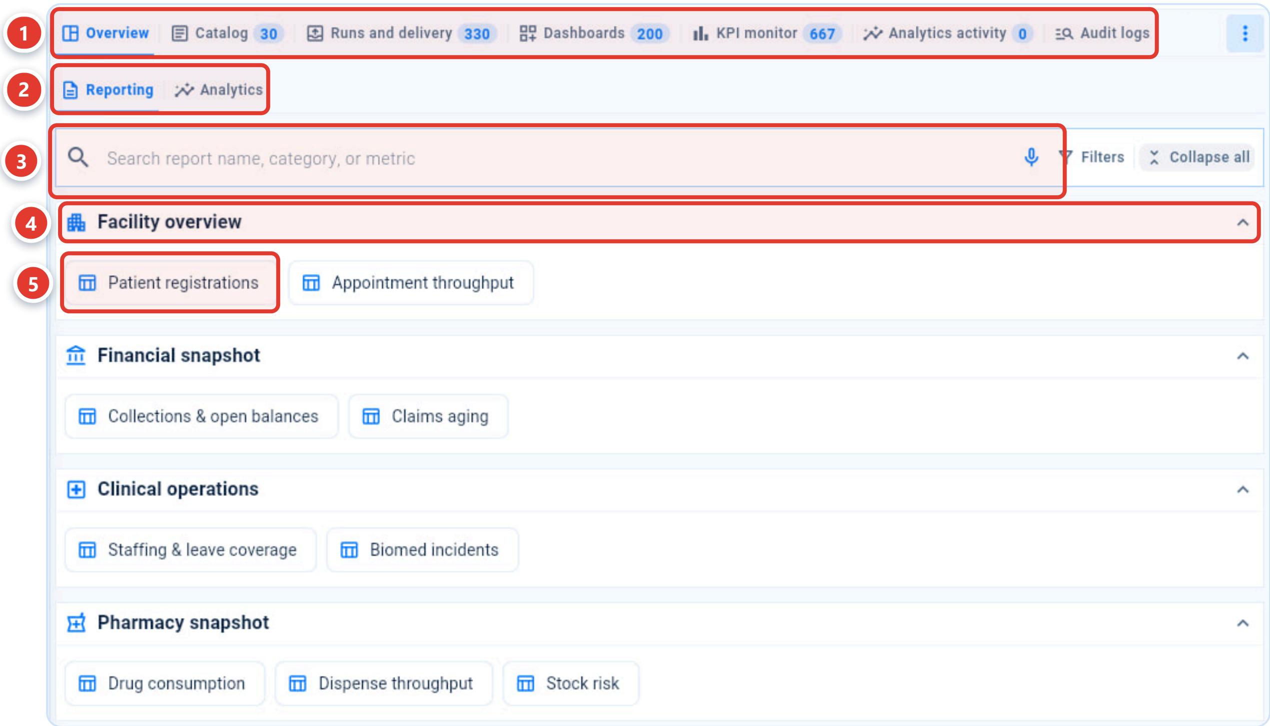

Figure 23.1. The reporting overview.

1. The tabs: **Overview**, **Catalog**, **Runs and delivery**, **Dashboards**, **KPI monitor**, **Analytics activity** and **Audit logs**. **More tabs** holds the rest, such as **PHI access**.
2. Switch between **Reporting** and **Analytics**.
3. Search by report name, category or metric.
4. Reports are grouped into snapshots, such as **Facility overview**, **Financial snapshot**, **Clinical operations** and **Pharmacy snapshot**. Select a group's heading to expand or collapse it.
5. Select a report, such as **Patient registrations**, to view it. **Collapse all** closes every group.

23.2 Run a report

Who: Managers and administrators

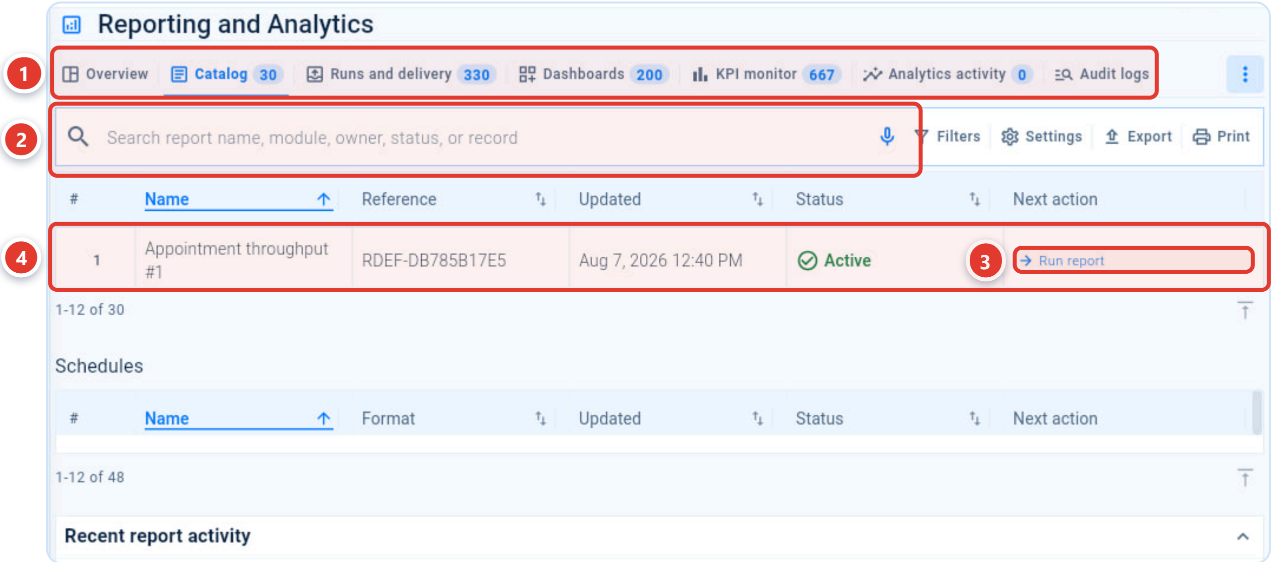

Figure 23.2. The report catalogue.

1. Open the **Catalog** tab, which lists every report with its reference, when it was last updated and its status.
2. Search by report name, module, owner, status or record.
3. Select **Run report** on an active report to run it now.
4. Select a report to see its details.

Runs and delivery lists each report run with its status; select **Retry** on a run that failed. Scheduled reports are listed under **Schedules**.

23.3 Monitor KPIs and logs

Who: Managers and administrators

Tab	What it shows
Dashboards	Ready-made dashboards for the facility.
KPI monitor	Key performance indicators, each marked **Normal**, **Warning** or **Critical**.
Analytics activity	Events recorded across HOSSPI HMS, such as check-ins, payments and lab results.
Audit logs	Who did what and when, for compliance checks. Search by user, action, record, patient, purpose or reason.
PHI access	Each time someone opened or used protected patient information.

CHAPTER 24

Troubleshooting and getting help

Answers to common problems, the meaning of the terms used in HOSSPI HMS, and how to reach the HOSSPI team.

24.1 Common problems

Who: Everyone

Problem	What to do
I cannot sign in.	Check that you chose **Email** or **Phone** correctly under **Sign in with**, and that Caps Lock is off. If you have forgotten your password, select **Reset password**. If your account is new, ask your administrator to check that it is **Active**.
The sign-in screen says **Account pending approval**.	Your facility is waiting for approval from HOSSPI. Contact one of the platform administrators listed in the message.
A menu item, tab or button in this manual is missing on my screen.	Your role, or your organisation's subscription package, does not include it. Ask your administrator to check your roles and the package.
A list does not show a record I expect.	Clear the search box, then select **Filters** and **Clear filters**. Check that the record belongs to your facility.
A form will not save.	Look for fields highlighted with a message beneath them. Fields marked with an asterisk (*) must be completed.
The connection indicator shows **Offline**.	Check your internet connection, and wait until it shows **Online** again before you continue working.
I see a message that the subscription has expired.	Ask an administrator to renew it. See Renew or change your subscription.
I cannot find a screen.	Type part of its name in **Search menu**. See Find a screen with Search menu.
Text is too small to read comfortably.	Increase the **Text size** or switch on **Bold text**. See Make the screen easier to read.

24.2 Glossary

Who: Everyone

Term	Meaning
Tenant	Your organisation as a whole, including all its facilities.
Facility	A hospital, clinic, laboratory or pharmacy that belongs to your organisation.
Department and **unit**	A department groups related services, such as the laboratory. A unit is a team within a department.
Ward, **room** and **bed**	The places where admitted patients stay. A ward contains rooms and beds.
Role	A named set of permissions for a job, such as Receptionist or Nurse.
Permission	One thing a person is allowed to see or do, such as reading patient records.
Module	An area of HOSSPI HMS, such as Laboratory or Billing. Your subscription package decides which modules you can use.
Patient registry	The list of every patient registered at your organisation.
MRN	Medical Record Number: the number that identifies a patient's record.
Encounter	One visit or episode of care, from the patient's arrival until the visit is completed.
OPD	Outpatient department: care for patients who are not admitted.
IPD	Inpatient department: care for patients admitted to a ward.
ICU	Intensive care unit.
Triage	Deciding how urgently a patient needs care, usually with their vital signs.
Vitals	Measurements such as blood pressure, temperature, pulse, breathing rate, oxygen saturation, weight and height.
Disposition	The decision at the end of a consultation, such as sending the patient home, admitting them or referring them.
Order or **request**	A request for a laboratory test, imaging study or medicine made during an encounter.
Formulary	The medicines your facility has approved for use.
Price book	The prices your facility charges for services and items.
Invoice	A bill for the services a patient received.
Pre-authorisation	An insurer's approval for a service before it is provided.
Claim	A request to an insurer to pay for the services a patient received.
Journal	An accounting entry recorded in your books.
Fiscal period	An accounting period, such as a month, that can be closed once its books are complete.

Term	Meaning
Roster	The schedule of shifts assigned to staff.

24.3 Getting help

Who: Everyone

Start with your facility administrator, who manages your account, your roles and your facility's settings.

For help with registration, your subscription or anything your administrator cannot resolve, contact the HOSSPI team:

- Email: **wasswawilson0002@gmail.com**
- Phone and WhatsApp: **+256783230321**
- Website: **www.hosspi.com/contact**

> **REPORT A PROBLEM CLEARLY**
> Tell us your facility's name, the screen you were using, what you expected to happen, what happened instead and roughly when. A screenshot helps.