



User Manual

Hospital Management System for Odoo v18.0

Table of Contents

1.	Introduction	3
2.	Features	4
3.	Installation	5
3.1	Install Python Dependencies.....	5
3.2	Install Audit Log Module	5
3.3	Restart Odoo Server	6
3.4	Update Apps List & Install.....	6
4.	HMS Modules & Workflows.....	7
4.1	Patient Management.....	7
4.2	Staff Management	19
4.3	Lab Test Management.....	27
4.4	Doctor Management.....	34
4.5	Role-Based Security Management	43
4.6	Token Management	51
4.7	Invoicing Prescriptions	57
4.8	Dispensing Medications	60
5.	HIPAA Compliance.....	66
6.	Technical Requirements & Compatibility:.....	66
7.	Change Log / Release Notes	67
8.	Support.....	67

1. Introduction

PITS Hospital Management System (HMS) is a comprehensive healthcare solution built on the Odoo ecosystem, designed to streamline and integrate core medical and administrative operations. The system provides a unified platform for managing patient records, staff, appointments, laboratory tests, prescriptions, insurance workflows, and more, all within a single interface. Developed specifically for Odoo Community Edition v18.0, PITS HMS helps healthcare providers optimize workflows, reduce administrative overhead, and improve patient care through automation and real-time access to data.

Tailored for clinics, hospitals, and multi-specialty medical centers, the system supports the full spectrum of healthcare processes—ranging from outpatient consultations and inpatient admissions to diagnostic procedures and pharmacy management. The Prescription and Medication Management module offers digital prescription creation with detailed medication instructions and automated stock validation. It generates invoices directly from prescriptions and maintains accurate medication inventory through an integrated dispensing system. It also enables organizations to maintain compliance with healthcare regulations such as HIPAA, safeguard sensitive data with role-based access controls and audit logs and deliver a seamless patient experience from registration to post-care follow-up.

Key advantages of PITS HMS include improved coordination across departments, automated scheduling with patient reminders, integrated insurance claim processing, and advanced reporting for data-driven decisions. With native support for Odoo CE v18.0 and seamless integration with OCA modules for audit tracking, PITS HMS delivers a secure, scalable, and customizable healthcare management platform that evolves with your organization's needs.

2. Features

- **Complete patient lifecycle management:** Tracks patient demographics, medical history, appointments, treatments, and hospital visits from registration through discharge and follow-up care.
- **Doctor and staff management:** Manages healthcare professionals' profiles, specializations, schedules, and department assignments for efficient hospital operations.
- **Appointment scheduling:** Enables booking, rescheduling, and tracking of patient appointments with automated reminders and real-time availability
- **Laboratory test management:** Streamlines test ordering, sample tracking, result entry, and reporting for various diagnostic procedures.
- **Laboratory test billing:** Automates the billing process by converting approved Lab tests into invoices, applying patient-specific pricing, discounts, and taxes
- **Prescription management:** Manages prescription processing, and tracks drug dispensing with dosage instructions.
- **Comprehensive reporting:** Generates detailed reports on patient care, hospital operations, and clinical outcomes for analysis.
- **Low Stock Alert:** The low stock alert system automatically monitors medical inventory levels and notifies stock managers via email when product quantities fall below predefined thresholds, ensuring timely restocking and preventing stockouts.
- **Prescription Invoicing:** Automates the billing process by converting approved prescriptions into invoices, applying patient-specific pricing, discounts, and taxes

- **Medication Dispensing:** Manages the physical handover of prescribed medicines, automatically updating stock levels, validating availability, and tracking lot/serial numbers to ensure accurate inventory control and patient safety.
- **Token & Queue Management (Add-on):** Organizes patient queues, counter allocations, and service-based token generation for streamlined flow.

3. Installation

For the proper working on PITS HMS module, we need to install the following module and python dependencies also:

- Audit Log

3.1 Install Python Dependencies

python-barcode: Required for barcode generation functionality.

Installation: *pip install python-barcode*

3.2 Install Audit Log Module

The Audit Log module records and tracks changes in Odoo.

Steps:

Step 1: Download the Module

- a. Visit [Audit Log App](#).
- b. Click **Download**.

Step 2: Extract the Files

- a. Locate the downloaded ZIP file.
- b. Right-click → **Extract All**.
- c. A folder named *auditlog* will appear.

Step 3: Make the Module Available to Odoo

You have two options:

- **Option A – Move to Odoo Addons Folder**
 - Copy the *auditlog* folder.
 - Paste it into your Odoo Addons directory.
- **Option B – Update Odoo Configuration File**
 - Keep the folder in another location.
 - Add its path to the *addons_path* line in your *odoo.conf*.

3.3 Restart Odoo Server

After adding new modules, restart your Odoo server:

- `sudo service odoo restart`

3.4 Update Apps List & Install

- a. Log in to Odoo as Administrator.
- b. Go to **Apps** → click **Update Apps List** → then click **Update**.
- c. Search and install the following:
 - **Audit Log**

4. HMS Modules & Workflows

To access all the features of the HMS module, ensure that the appropriate user permissions are enabled. Navigate to **Settings** → **Users**, select the respective user, and enable the **Hospital Management System** permissions.

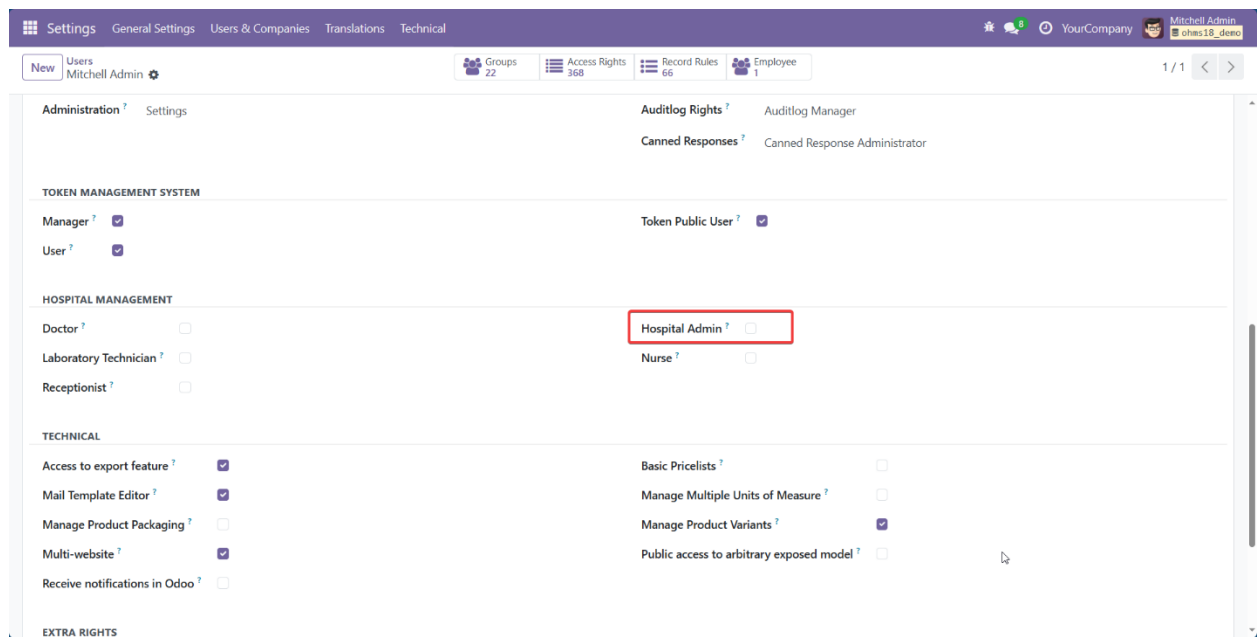


Figure 1: Configuration Setup

4.1 Patient Management

- Navigate to Patients > New
- Fill in personal details (Name, DOB, Gender, etc.)
- In patients view there are two types
 - **Outpatient (OP)** – No need for personal information.
 - **Inpatient (IP)** – All patient information is required.

Hospital Management
Doctor Management
Staff Management
Patient Management
Prescription
Lab Test
Insurance
Configuration

New
My Patients
2 Patient - OP

Appointments
5
Medical Records
1
Lab Tests
3
Consents
1

Print Patient Card
Create Appointment
Create Privacy Consent

PAT/00041

Name
2 Patient - OP

Phone
+91 1234 567 890
Call
SMS

Email
patient2@yopmail.com

Date Of Birth
06/14/1989

Age
36

Patient Type
☐ Outpatient (OP)
☒ Inpatient (IP)

Primary Care Doctor
Test Doctor

Gender
Female

Blood Group
A-

Language ?
English (US)

Personal Information
Other Information
Gyneco/Obstetrics
Life Styles
Status & Family
Insurance
Additional Notes
Mec

Appointment ID	Date	Doctor	Consultation Notes
APP/00109	11/24/2025 13:49:06	Test Doctor	qedqdq
APP/00110	11/24/2025 13:50:46	Test Doctor	need to visit by next saturday

Figure 2: Patient View

Buttons

Print Patient Card Button: Used to print the patient card.

PATIENT ID CARD

Name:
Anand

Patient ID:
PAT/00050

Date of Birth:
07/08/2025

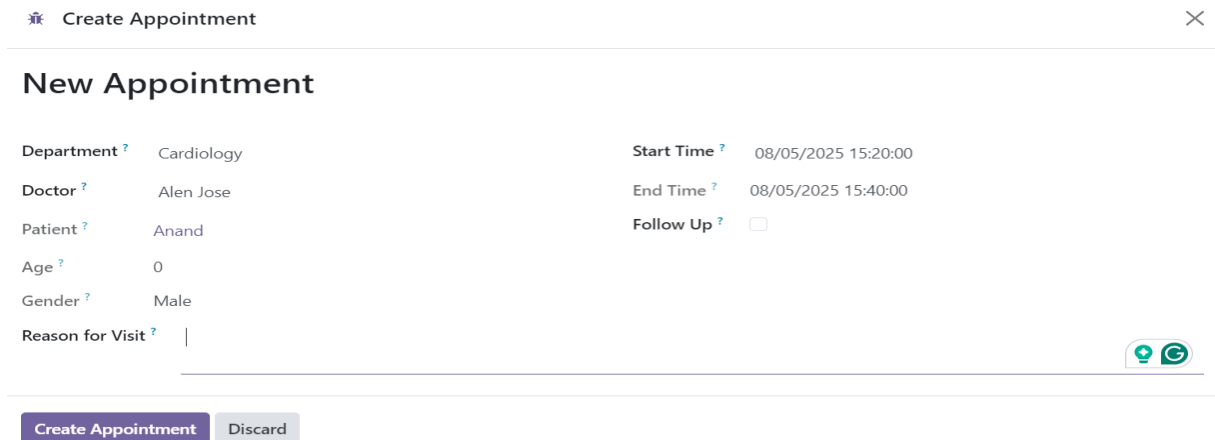
Gender:
Male

Blood Type:
B+



Figure 3: Patient ID Card

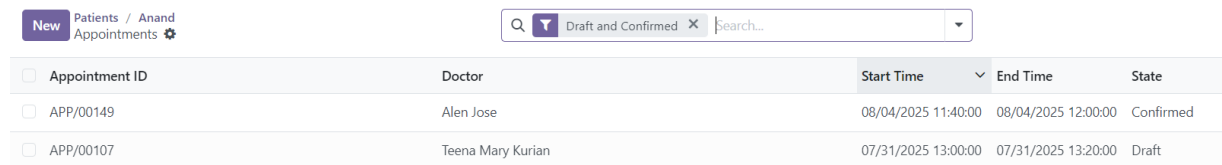
- **Create Appointment Button:** Used to schedule an appointment with a specific doctor for a particular issue.



The screenshot shows the 'Create Appointment' form. It has a title bar with a star icon and a close button. The form is titled 'New Appointment'. It contains several input fields: 'Department' (Cardiology), 'Doctor' (Alen Jose), 'Patient' (Anand), 'Age' (0), 'Gender' (Male), 'Start Time' (08/05/2025 15:20:00), 'End Time' (08/05/2025 15:40:00), 'Follow Up' (checkbox), and 'Reason for Visit' (text area). At the bottom, there are two buttons: 'Create Appointment' and 'Discard'.

Figure 4: Create Appointment View

- **Appointments Button:** This view is showing all the appointments of that patient

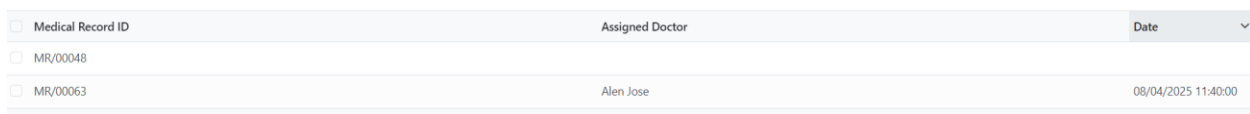


The screenshot shows the 'All Appointments View' for patient Anand. It has a title bar with a 'New' button and a search bar. The search bar contains 'Draft and Confirmed' and a search icon. Below the search bar is a table with columns: Appointment ID, Doctor, Start Time, End Time, and State. The table contains two rows of data.

Appointment ID	Doctor	Start Time	End Time	State
APP/00149	Alen Jose	08/04/2025 11:40:00	08/04/2025 12:00:00	Confirmed
APP/00107	Teena Mary Kurian	07/31/2025 13:00:00	07/31/2025 13:20:00	Draft

Figure 5: All Appointments View

- **Medical Record Button:** It is used to view the medical records which contain prescribed medicines and progress status



The screenshot shows the 'Medical Record View'. It has a title bar with a search bar. The search bar contains 'MR/00048' and a search icon. Below the search bar is a table with columns: Medical Record ID, Assigned Doctor, and Date. The table contains two rows of data.

Medical Record ID	Assigned Doctor	Date
MR/00048		
MR/00063	Alen Jose	08/04/2025 11:40:00

Figure 6: Medical Record View

- **Lab Tests Button:** It is used to view the lab test records which contains all the lab test record of that patient.

<input type="checkbox"/> Test Number	Patient	Referring Doctor	Test Date	Report On	Total Amount	Status
<input type="checkbox"/> LAB/0003	Anand	Jeeson David	08/01/2025	08/05/2025	800.00	Confirmed
<input type="checkbox"/> LAB/0018	Anand	Alen Jose	07/08/2025	08/04/2025	600.00	Confirmed

Figure 7: Lab Test View

- **Personal Information Page:** All personal details like address, Emergency contact name and number, Relationship with patient, occupation.

Address ?

Street...

Street 2...

City

Country

ZIP

State

Emergency Contact Name ?

Emergency Contact Phone ?

Occupation ?

Figure 8: Patient Personal Info

- **Other Information Page:** Other details such as Socioeconomic status, Education level, Allergies and Medical conditions, we can create Allergies and Medical conditions from **Configuration tab**.

Socioeconomic Status ?

Education Level ?

Medical Conditions ?

Allergies ?

Figure 9: Other Information

Configuration

Departments

Specialization

Medical Conditions

Allergies

Staff Types

Figure 10: Medical Conditions / Allergies

- **Lifestyle page:** It includes physical exercises, diet details, sleep schedule

Diet and Exercise

Addiction

PHYSICAL EXERCISE

Exerise ? ☐

SLEEP SCHEDULE

Sleeps At Daytime ? ☐

Sleep Hours ? 0

DIET DETAILS

Meals Per Day ? 0

Eats Alone ? ☐

Coffee ? ☐

Soft Drinks ? ☐

Salt ? ☐

Figure 11: Diet and Exercise View

Diet and Exercise
Addiction

SMOKING

Smokes ? ☐

ALCOHOL

Drinks Alcohol ? ☐

DRUGS

Drug Habits ? ☐

Figure 12: Addiction Information

- **Status and family page:** It includes hospitalization status, marital status, family details

Hospitalization Status ?
Discharged

Deceased ? ☐

Marital Status ?

Family Details ?

Figure 13: Status and Family View

- **Insurance and Doctors page:** It includes insurance details and, primary care doctor.

Is Insured ?	<input checked="" type="checkbox"/>	Primary Care Doctor ?	Jeeson David
Insurance Provider ?	INSU Prov - 1		
Insurance Policy Number ?			
Insurance Group Number ?			
Insurance Card Number ?			
Primary Policyholder Name ?			
Relation to Policyholder ?			

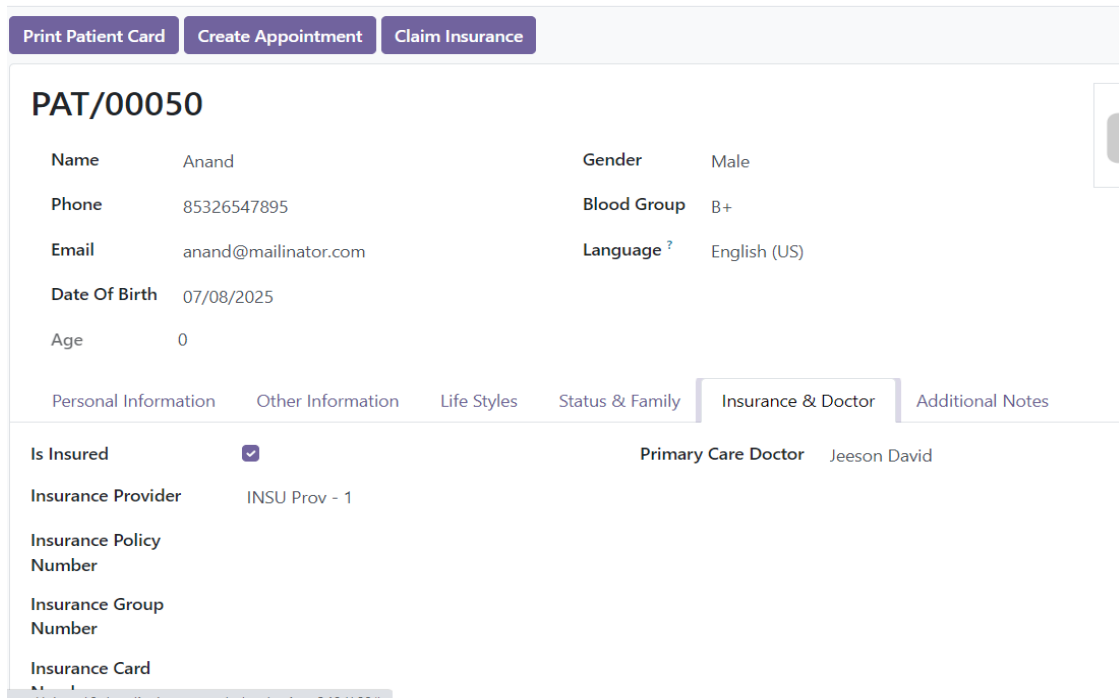
Figure 14: Insurance & Doctors Page

- Insurance provider details can be added in the insurance -> Insurance provider tab

Insurance Provider Name ?	INSU Prov - 1
Provider Code ?	987654678907654789
Phone Number ?	
Email ?	
Website ?	www.https://google.com
Address ?	west car street
Contact Person ?	Neema

Figure 15: Insurance Provider Tab

- Patient can **claim the insurance** if the **Is insured** field is enabled



Print Patient Card Create Appointment Claim Insurance

PAT/00050

Name Anand Gender Male

Phone 85326547895 Blood Group B+

Email anand@mailinator.com Language ? English (US)

Date Of Birth 07/08/2025

Age 0

Personal Information Other Information Life Styles Status & Family Insurance & Doctor Additional Notes

Is Insured ☒ Primary Care Doctor Jeeson David

Insurance Provider INSU Prov - 1

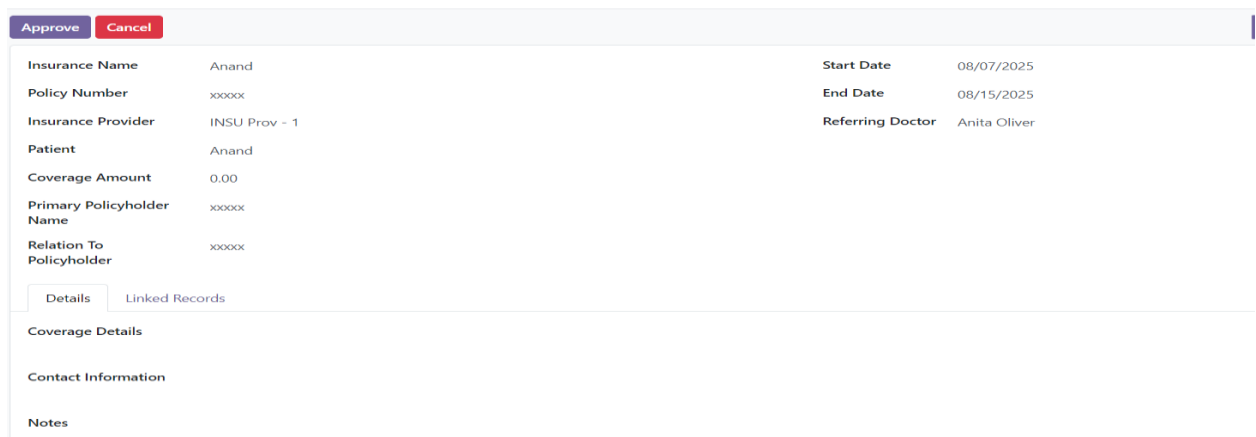
Insurance Policy Number

Insurance Group Number

Insurance Card

Figure 16: Is Insured Enabled check box

- A record will be created in the Insurance Records, which can be accessed through the **Insurance → Insurance Records tab**. You can then add additional details as mentioned in the record.



Approve Cancel

Insurance Name Anand Start Date 08/07/2025

Policy Number xxxxxx End Date 08/15/2025

Insurance Provider INSU Prov - 1 Referring Doctor Anita Oliver

Patient Anand

Coverage Amount 0.00

Primary Policyholder Name xxxxxx

Relation To Policyholder xxxxxx

Details Linked Records

Coverage Details

Contact Information

Notes

Figure 17: Insurance Request

- The admin can review and approve the request. In the lab record, the selected insurance can be added, and the linked records will be visible on the **Linked Records** page of the insurance record.
- Insurance providers can be created from the **Insurance** → **Insurance Providers** tab, where the necessary insurance provider details are added. Linked patient insurance records can be found on the Insurance page.

INSU Prov - 1

BASIC INFORMATION		CONTACT INFORMATION	
Provider Code	987654678907654789	Phone Number	
Contact Person	Neema	Email	
		Website	www.https://google.com
<div> Address Insurances </div>			
Insurance Name		Policy Number	
Deluxe Insurance		87654356786546	
Insurance for AS		89765432256789	
Insurance for AS		89765432256789	
Insurance for AS		89765432256789	
Insurance for Anthief		7654324567890	
Anand		xxxxxx	

Figure 18: Insurance Provider

• Patient Medical Record

While creating patient appointments, a new medical record is automatically generated, including the patient's name, department, assigned doctor, and linked appointment details. Alternatively, medical records can be manually created from the **Patient Management tab** → **Patient Medical Record**.

The medical record contains two main sections Medicine Prescribed and Medical Record:

○ Medicine Prescribed:

This section lists all medicines prescribed by the doctor, including the medicine name, dosage, frequency, duration, and any additional notes. The prescription can also be printed from this section also the prescription menu can be viewed from the **Hospital Management tab** → **prescription**.

Also, we can add digital signatures for doctors in prescription templates by uploading their signatures in user profiles under Settings > Users & Companies > Users.

PRESCRIPTION

Prescription No: PRES/00018

Date: 09/22/2025

PATIENT INFORMATION

Name: vishnu

ID: PAT/00003

Age: 25 years

Gender: Male

PRESCRIBING PHYSICIAN

Name: rahul

Specialization: MD


Doctor ID: DOC0001

Prescription Details

Medication	Dosage	Frequency	Duration	Instructions
antibiotic	1	Twice Daily (BD)	7 days	N/A
paracetmol	1	Twice Daily (BD)	7 days	N/A

YourCompany - Prescription issued under strict medical supervision

Please follow all instructions carefully. Contact your physician for any concerns.



rahul

Physician's Signature

Figure 19: Prescription View

Open: Prescriptions

Print Prescription

Patient ? Anand
Prescribed Date ? 08/05/2025 15:54:48

Prescribing Doctor ? Alen Jose
Appointment ?

Prescription Template ? Select a disease templa...
Medical Record ? MR/00072

Prescription
Notes

Medicine	Dosage	Frequency	Duration...	Notes
paracetamol	5g	Twice Daily (BD)	7	
Add a line				

Save Discard

Figure 20: Add Prescription

○ Progress Notes

This section contains the track history of the medical condition.

Medical Record ID ?
MR/00072

Patient ? Anand
Department ? Cardiology
Assigned Doctor ? Alen Jose
Date ? 08/05/2025 15:40:00
Appointments ? APP/00173 ✕

Medicines Prescribed
Progress Notes


Prescription ID	Patient	Prescribing Doctor	Prescribed Date
PRES/00038	Anand	Alen Jose	08/05/2025 15:54:48 
Add a line			

Figure 21: Medical Record

- Medical Record

This contains the medical record of the patient under consultation. Only one medical record exists for each patient. Each record contains the patient's name, department, assigned doctors, date, and external record details. From the medical record, you can access the patient's prescriptions and appointments.

If the patient is from another hospital and you need to add that hospital's medical record, you must enable the *External Record* option and provide details such as the external source, external reference, external record date, and upload the corresponding PDF documents.

Progress Notes

This section contains the track history of the medical condition.

New

Medical Record

MR/00046

Prescriptions

0

Appointments

1

Medical Record ID ?

MR/00046

Patient ?

John doe

Primary Department ?

Heart

Secondary Departments ?

Date ?

08/14/2025 16:17:53

External Record ?

☒

External Source ?

External Reference ?

External Record Date ?

External Documents ?

External Documents

Progress Notes

Subjective ?

Objective ?

Assessment ?

Plan ?

Send message

Log note

Activities

Figure 22: Medical Record

4.2 Staff Management

- Navigate to **Staff Management -> Staff Members**.
- Fill in personal details (Name, Address, DOB, Gender, Qualification, staff type, Department, working Hours, Time zone).
- Also need to fill Staff information like assigned manager, year of experience and need to create related users.
- Digital signatures for staffs can be uploaded in their user profiles **Settings > Users & Companies > Users or User -> My profile**.

[Hospital Management](#)
[Doctor Management](#)
[Staff Management](#)
[Patient Management](#)
[Prescription](#)
[Lab Test](#)
[Insurance](#)
[Configuration](#)

[/ Mitchell Admin](#) / Mitchell Admin

[This Month](#)
[Time Off](#)

[1 / 1](#)

WORK PHONE (555)-123-2389

WORK LOCATION Building 1, Second Floor

Manager

Coach

[Preferences](#)
[Account Security](#)
[Devices](#)
[Resume](#)
[Work Information](#)
[Private Information](#)
[HR Settings](#)

Notification
☒ Handle by Emails
 ☐ Handle in Odoo

Email admin@gmail.com

Email Signature --
Mitchell Admin

Signature

Language English (US)

Timezone Asia/Kolkata (12/02/2025 15:43:56)

Calendar Default Privacy Public

SIGNATURE

Figure 23: Digital Signatures View

[New](#)
[Staff Members](#)
[Staff A1](#)

[Org Chart](#)
[Time Off](#)
[Contacts](#)

Staff A1

Staff ID STAFF/00005

Qualification BDS

Staff Type Pharmacist

Department ENT

Work Email staffa1@gmail.com

Work Phone +1 555-555-5556

Work Mobile 9854625461

[Work Information](#)
[Private Information](#)
[Staff Info](#)

Manager Alen Jose

Experience (years) 10

Related User

[Create User](#)

Figure 24: Staff Member View

- Qualification menu can be accessed from **Configuration ->Qualification**

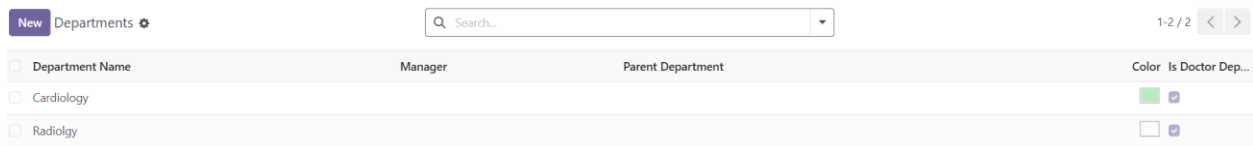


The screenshot displays the 'Qualifications' configuration page. At the top, there is a 'New' button and a search bar labeled 'Search...'. Below this is a table with a single column 'Qualification Name'. The table contains five rows, each with a checkbox and a text label: MBBS, MD, Nursing, BDS, and BDS.

Qualification Name
<input type="checkbox"/> MBBS
<input type="checkbox"/> MD
<input type="checkbox"/> Nursing
<input type="checkbox"/> BDS
<input type="checkbox"/> BDS

Figure 25: Qualifications View

- Departments menu can be accessed from **Configuration ->Departments**




The screenshot displays the 'Departments' configuration page. At the top, there is a 'New' button, a search bar labeled 'Search...', and a pagination indicator '1-2 / 2'. Below this is a table with columns: 'Department Name', 'Manager', 'Parent Department', 'Color', and 'Is Doctor Dep...'. The table contains two rows: 'Cardiology' and 'Radiology', each with a checkbox and a color selection icon.


Department Name	Manager	Parent Department	Color	Is Doctor Dep...
<input type="checkbox"/> Cardiology				<input type="checkbox"/>
<input type="checkbox"/> Radiology				<input type="checkbox"/>

Figure 26: Departments View

- Staff Type menu can be accessed from **Configuration -> Staff Type.**

New

Staff Types 

 Search...

☐ Name

☐ Nurse

☐ Receptionist

☐ Pharmacist

☐ Laboratory Technician

☐ Radiologist

☐ Accountant / Billing Team

☐ Ambulance Driver


☐ Other


Figure 27: Staff Type


- Working Hours and Time zone view can be accessed from **Configuration -> Working Shifts** in which we can add the Standard 40 hours/week and add time zone.


New

Working Shifts

Standard 40 hours/week 

 1 Public Time Off

 Time Off

 Work Resources

1 / 12 <

Switch to 2 weeks calendar

Standard 40 hours/week

Company Full Time [?]

40:00 hours/week

Timezone [?]

Asia/Kolkata (08/05/2025 18:25:39)

- ▲

Average Hour per Day [?] 08:00

Working Hours









Name	Day of Week	Day Period	Work from	Work to	Duration (da...	
Monday Morning	Monday	Morning	08:00	12:00	0.50	
Monday Lunch	Monday	Break	12:00	13:00	0.00	
Monday Afternoon	Monday	Afternoon	13:00	17:00	0.50	
Tuesday Morning	Tuesday	Morning	08:00	12:00	0.50	
Tuesday Lunch	Tuesday	Break	12:00	13:00	0.00	
Tuesday Afternoon	Tuesday	Afternoon	13:00	17:00	0.50	
Wednesday Morning	Wednesday	Morning	08:00	12:00	0.50	
Wednesday Lunch	Wednesday	Break	12:00	13:00	0.00	

Figure 28: Working Shifts View

- If the Staff type is **Nurse**, need to add nurse Specialization.

The **Nurse Specialization** menu can be accessed via **Configuration** → **Nurse Specialization**.

When **Staff Type** is selected as **Nurse**, an additional **Nurse Info** page will appear where the following details should be added:

- **Assigned Ward**

This is used to assign a ward to a nurse within the department. Ward configuration can be accessed through **Configuration** → **Medical Wards**, where you can add the **Ward ID**, select the **Department**, and use the **Active** field to activate or deactivate the ward.

Test Ward

Ward ID	Test Ward
Department	Cosmetics
Active	<input checked="" type="checkbox"/>

Figure 29: Assigned Ward

- **Assigned Patients**

This is used to assign Patients to a nurse in the department.

New

Nurse Specializations ⚙️

Search...

<input type="checkbox"/>	Specialization
<input type="checkbox"/>	Cardiac Nurse
<input type="checkbox"/>	Community Health Nurse
<input type="checkbox"/>	Dialysis Nurse
<input type="checkbox"/>	Emergency Nurse
<input type="checkbox"/>	General Nurse
<input type="checkbox"/>	Geriatric Nurse
<input type="checkbox"/>	ICU Nurse
<input type="checkbox"/>	Infection Control Nurse
<input type="checkbox"/>	Maternity Nurse
<input type="checkbox"/>	Neonatal Nurse
<input type="checkbox"/>	Nurse Anesthetist
<input type="checkbox"/>	Oncology Nurse
<input type="checkbox"/>	Operating Theatre Nurse
<input type="checkbox"/>	Orthopedic Nurse

Figure 30: Nurse Specializations

- If the Staff type is **Lab Technicians**, need to add Lab Technicians Specialization. The **Lab Technicians Specialization** menu can be accessed via **Configuration** → **Lab Technicians Specialization**, where you can add the specialization and its corresponding code.

New

lab Technician Specializations

Q

Search...

<input type="checkbox"/> Name	Code
<input type="checkbox"/> Hematology	HEM
<input type="checkbox"/> Clinical Biochemistry	BIO
<input type="checkbox"/> Microbiology	MIC
<input type="checkbox"/> Pathology	PAT
<input type="checkbox"/> Immunology	IMM
<input type="checkbox"/> Cytogenetics	CYT
<input type="checkbox"/> Histopathology	HIS
<input type="checkbox"/> Molecular Biology	MOL
<input type="checkbox"/> Blood Banking	BLD
<input type="checkbox"/> Parasitology	PAR
<input type="checkbox"/> Serology	SER
<input type="checkbox"/> Clinical Pharmacology	PHA
<input type="checkbox"/> Virology	VIR

Figure 31: Lab Technician Specializations

- If the Staff type is **Radiologist**, need to add Radiology Specializations.

The **Radiology Specializations** menu can be accessed via **Configuration** → **Radiology Specializations**, where you can add the specialization.

Employee Certifications

The employee certification system manages professional certifications for healthcare staff. Here's what's included:

All Certifications

Tracks individual employee certifications which can be accessed from **Configuration-> All Certifications**.

Active

Expired

Pending Renewal

Employee	Abhram Mathew	Issue Date	07/01/2025
Certificate Reference	CERT-00047	Expiry Date	08/05/2025
Cert Type	CPR Certification	Renewal Date	08/04/2025
Issuing Organization	fafa		
Certificate Code	sdfsdfsf		
Badge ID [?]	wfwef		
Tags	Annual Requirement		
Certificate Document Upload [?]	<div>Upload your file</div>		

Figure 32: Employee Certification

This includes Employee Name, Certificate Reference, Certificate Type, Issuing Organization, Certificate Code, Badge ID, Tags, Document Upload, Issue Date, Expiry Date, Renewal Date.

In the Hospital Management->Configuration->Setting

- **Employee Certification Reminder Days:** (default: 30 days) Sends notifications when employee certifications are about to expire.
- **Certification Types:** Defines the types of certifications, accessible from Configuration → Certificate Types.
 - **Name:** Name of the certification type (e.g., "CPR Certification", "Medical License").
 - **Description:** Detailed description.
 - **Is Mandatory:** Whether this certification is required.
 - **Applicable Departments:** Departments where this certification applies.

New

Certification Types

CPR Certification ⚙️

Name	CPR Certification
Description	Cardiopulmonary Resuscitation (CPR) certification for healthcare providers
Is Mandatory	<input checked="" type="checkbox"/>
Applicable Departments	Management / Administration ✕

Figure 33: Certification Types

Certification Tags: Used to categorizes certifications, accessible from **Configuration → Certificate tags**.

Name: Tag name.

Category: Type of tag (Skill-based, Department-specific, Compliance, Custom).

4.3 Lab Test Management

The Laboratory Test Management System is a comprehensive module designed to manage medical laboratory tests, their types, packages, and results within the PITS Hospital Management System (HMS). It supports both numeric and qualitative test results with appropriate validations.

Lab test management contains Lab records, lab test type, lab test category, lab test package.

• Lab Test Record

The main record for a lab test request includes details such as the test number, test date, patient name, referring doctor, disease type, lab technician, and lab package. A lab package contains a group of lab test types.

In the **Lab Tests** section, the test types are selected from the Lab Test Type list. The corresponding ranges, units of measure, and amounts will be automatically populated. The results are recorded based on the result type:

- If the result type is **Numeric**, the value should be entered in the Numeric result field.
- If the result type is **Qualitative** (Positive/Negative), it should be entered in the qualitative result field.

Print Lab Result
Preview Report

Draft
Confirmed
Invoiced
Sample Collected
Result Delivered

Test Number ? LAB/0005
Test Date ? 10/06/2025
Sample Collection Date ? 10/06/2025
Result Delivery Date ? 10/06/2025
Patient ? uad
Referring Doctor ? rahul
Disease Type ?
Lab Technician ? sujatha
Packages ?

Lab Tests
Insurance Details
Notes
Payment Status

Test Type	Minimum Ra...	Maximum R...	Unit of Measure	Numeric Res...	Qualitative Result	Amount	Comments
Fasting Blood Glucose	70.00	100.00	Units	200.00		200.00	
HBsAg (Hepatitis B)					POSITIVE	300.00	

Figure 34: Laboratory Test Record

After Result Delivered, the test result can be viewed using the **Preview Result** button, and it can be downloaded using the **Print Lab Result** button and entered while the test result is in the *Sample Collected* state. The result document also contains a QR code, which can be scanned to download the results.

Insurance Details

This section contains the insurance claim details created from the insurance records created the patient record.

Progress Notes

This section contains the track history of the medical condition.


Laboratory Test Report

1 Patient - IP

Age: 45 Years

Sex: male

PID: PAT/00040



Registered on: 02 Dec, 2025

Collected on: 02 Dec, 2025


Test Number: LAB/0126

Reference By: Dr. Dr. Anoop

Investigation	Result	Reference Value	Unit
Blood Test			
Platelets	6.00	5.00 - 10.00	oz
RBC	10000.00	14000.00 - 15000.00	oz
WBC	2000.00	1000.00 - 10000.00	mm

Interpretation: No specific interpretation provided

Thanks for Reference



Test Lab Technician

Medical Lab Technician

****End of Report****



Dr. Dr. Anoop

(MBBS, MD MBBS)

Generated on: 02 Dec, 2025

Figure 35: Lab Test Report

- **Lab Test Type**

Defines different types of laboratory tests, including the name, lab test category, result type, ranges, and unit of measure. If the result type is **Numeric**, ranges and the unit of measure must be specified.

If the result type is **Qualitative** (Positive/Negative), this information should be added while creating the lab test record.

Complete Blood Count (CBC)

TEST DETAILS		REFERENCE RANGES			
Category	Hematology	Range	100.00	to	150.00 unit
Sale Price	200.00				
Result Type	<input checked="" type="radio"/> Numeric (Reference Range) <input type="radio"/> Qualitative (Positive/Negative)				

Figure 36: Lab Test Type

- **Lab Test Category**

Categorizes laboratory test types for better organization. Supports parent-child relationships to allow nested categories and show all test type added in that category in a Hierarchy cart.

Category

TEST TYPE

Parent Category

T1B1

CATEGORY HIERARCHY

T1B1

Category

TTTT

Test A

Test B

gdfhdhjj

kiok

lknljhl

tert

test Q

Figure 37: Lab Test Category

- **Lab Test Package**

Groups multiple test types into packages. It allows you to bundle multiple lab tests together and offer them at a discounted rate.

Discount Types: There are two types of discounts

- **Fixed Amount**

A specific amount is subtracted from the total price of the tests.

- **Percentage**

A percentage of the total price is subtracted.

New Laboratory Test Packages
BLOOD TEST
1 / 3

BLOOD TEST

Laboratory Test Services

PACKAGE DETAILS

PRICING

Test Types
Platelets X RBC X WBC X

Base Amount 48,000.00
☒ Fixed Amount 8,000.00
☐ Percentage
Final Amount 40,000.00

Test Types Description

Test Name	Unit of Measure	Minimum R...	Maximum R...	Sale Price
Platelets	OZ	5.00	10.00	42,000.00 X
RBC	OZ	14,000.00	15,000.00	4,000.00 X
WBC	mm	1,000.00	10,000.00	2,000.00 X

Figure 38: Lab Test Package

• Invoicing Lab Test Records

Creating an Invoice

1. Select one or more confirmed lab test record of the same patient

New Laboratory Test Records
2 selected X Create Invoices Actions

<input checked="" type="checkbox"/>	Test Number	Patient	Referring Doctor	Test Date	Report On	Total Amount	Status
<input checked="" type="checkbox"/>	LAB/0003	vishnu	rahul	09/30/2025	10/01/2025	350.00	Confirmed
<input checked="" type="checkbox"/>	LAB/0004	vishnu	rahul	09/30/2025	10/01/2025	1,700.00	Confirmed

Figure 39: Lab Test Invoice create

2. Click Create Invoice.
3. System will:
 - Create a draft invoice.
 - Add all Lab test type items as invoice lines.

New Laboratory Test Records INV/2025/00014 1 / 1

Lab Tests 2 records

Send Print Pay Preview Credit Note Reset to Draft Draft Posted

You have **outstanding credits** listed below for this customer.

Customer Invoice
INV/2025/00014

Customer ? vishnu Invoice Date ? 10/01/2025
Due Date ? 10/01/2025
Journal ? Customer Invoices

Invoice Lines Journal Items Other Info

Product	Account	Quantity	UoM	Price	Taxes	Amount
Hemoglobin (Hb)	400000 Product Sales	1.00		150.00		\$ 150.00
Fasting Blood Glucose	400000 Product Sales	1.00		200.00		\$ 200.00
PSA (Prostate Specific Antigen)	400000 Product Sales	1.00		800.00		\$ 800.00
ANA (Anti-Nuclear Antibody)	400000 Product Sales	1.00		900.00		\$ 900.00

Terms and Conditions

Untaxed Amount: **\$ 2,050.00**
Total: **\$ 2,050.00**

Figure 40: Invoice view

4. Review and post the invoice

The payment status of a particular invoice can be tracked on its related invoice.

New Laboratory Test Records LAB/0003 1 / 2

Invoices 1

Draft Confirmed Invoiced

Test Number ? LAB/0003 Patient ? vishnu
Test Date ? 09/30/2025 Referring Doctor ? rahul
Disease Type ? fever
Lab Technician ? sujatha
Packages ?

Lab Tests Insurance Details Notes Payment Status

Payment Status ? **Not Paid**

Figure 41: Payment Status

4.4 Doctor Management

The Doctor Management system in the module extends Odoo's HR module to manage healthcare professionals, their appointments, and related information.

- **Doctor**

We can create doctors from **Doctor Management -> Doctors**.

- Digital signatures for doctors can be uploaded in their user profiles **Settings > Users & Companies > Users or User -> My profile**.

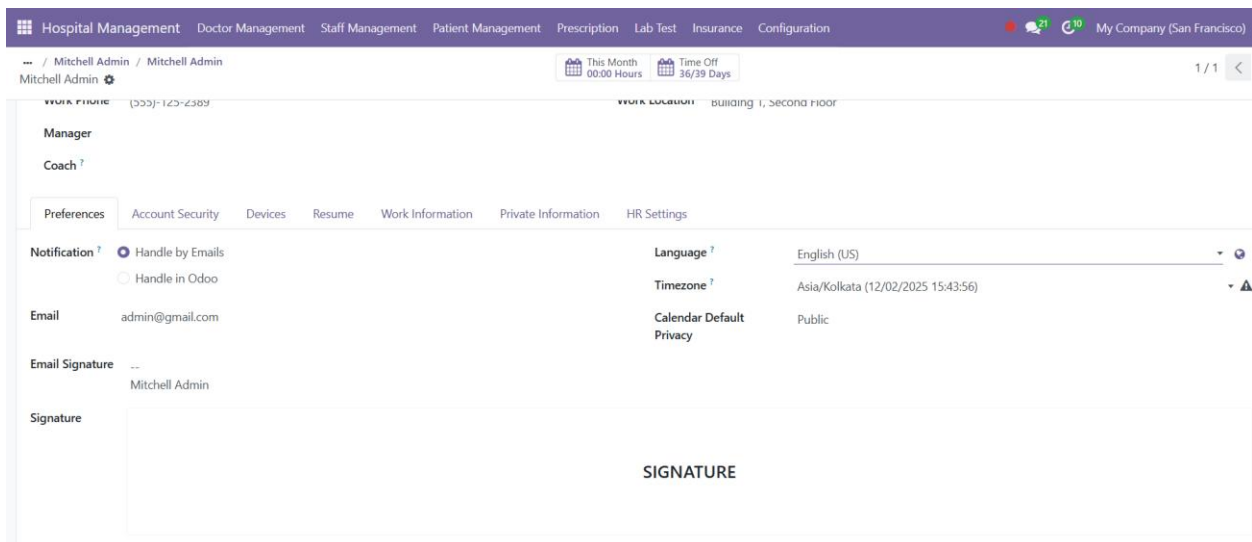


Figure 42: Digital Signatures View

New

Doctors

Dr. Arjun

Org Chart

Contacts

1

Appointments

7 records

Certifications

No records

Dr. Arjun

Doctor Code ?

DOC0005

Qualification ?

MBBS ×

MD MBBS ×

MMBBSS ×

Specialization ?

Kidney

Department ?

Radiology ×

Consultation Type ?

Both

Consultation Fee ?

200.00

Job Position ?

e.g. Sales Manager

Work Email ?

mark.brown23@example.com

Work Phone ?

*****5556

Work Mobile ?

Work Information

Private Information

Doctor Info

Doctor Documents

LOCATION

Work Address ?

YourCompany

250 Executive Park Blvd, Suite 3400

San Francisco 94134

CA

ORGANIZATION CHART

Dr. Anoop

Surgeon

8

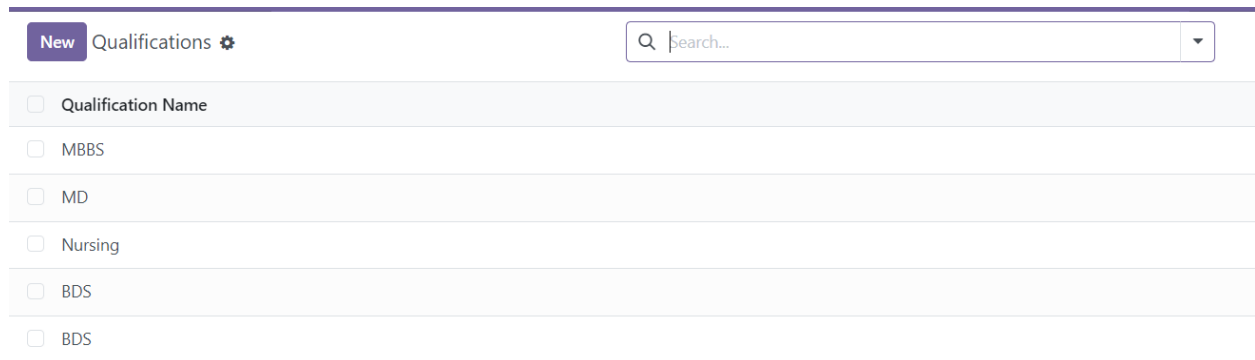
Figure 43: Doctor View

While creating Doctors Some required fields Is Doctor, Doctor Code, Qualification, Specialization, Departments, Consultation Notes, Consultation Fee,

Work Information, Private Information, Doctor info, Doctor Documents and Patients Appointments Details.

Doctor Code: Unique identifier for doctors

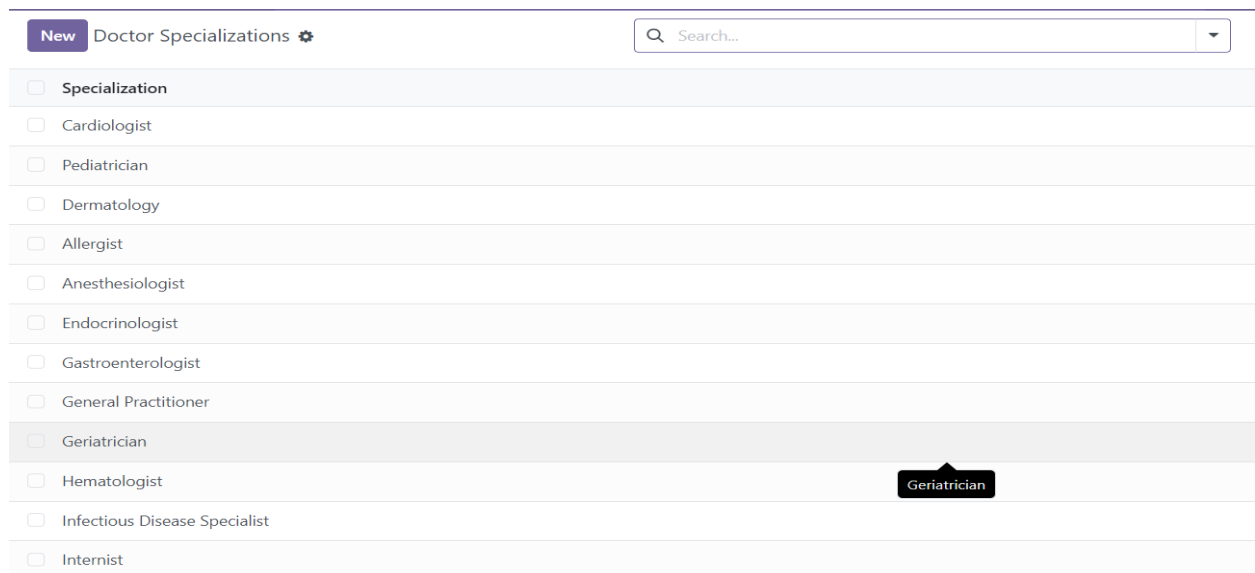
Qualification: Professional qualifications which created from the menu
Configuration-> Qualification



Qualification Name
<input type="checkbox"/> Qualification Name
<input type="checkbox"/> MBBS
<input type="checkbox"/> MD
<input type="checkbox"/> Nursing
<input type="checkbox"/> BDS
<input type="checkbox"/> BDS

Figure 44: Doctor Qualification

Specialization: Doctor's medical specialization which created from the menu **Configuration-> Specialization**.



Specialization
<input type="checkbox"/> Specialization
<input type="checkbox"/> Cardiologist
<input type="checkbox"/> Pediatrician
<input type="checkbox"/> Dermatology
<input type="checkbox"/> Allergist
<input type="checkbox"/> Anesthesiologist
<input type="checkbox"/> Endocrinologist
<input type="checkbox"/> Gastroenterologist
<input type="checkbox"/> General Practitioner
<input checked="" type="checkbox"/> Geriatrician
<input type="checkbox"/> Hematologist
<input type="checkbox"/> Infectious Disease Specialist
<input type="checkbox"/> Internist

Figure 45: Doctor Specialization

Departments: Medical departments to which the doctor belongs. These are created from the menu **Configuration → Departments**. While creating a department, the **Is Doctor Department** option must be enabled to identify it as a doctor's department.

New Departments

Search...

1-2 / 2

<>

<input type="checkbox"/>	Department Name	Manager	Parent Department	Color	Is Doctor Dep...
<input type="checkbox"/>	Cardiology			<div></div>	<div></div>
<input type="checkbox"/>	Radiology			<div></div>	<div></div>

Figure 46: Department View

Consultation Type: In-person, online, or both

Consultation Fee: Fee for consultations

Work Information: Working Address, Working Hours, Time Zone

Private Information: Personal Address

Doctor info: Contains details about the reporting manager, work experience, and doctor login credentials.

Doctor Documents: Contains details to track professional qualifications such as qualifications, document details, license number, and license expiry date. It also includes checks for “license expiry” and “already expired licenses,” with notifications sent accordingly.

In the **Hospital Management->Configuration->Setting->License Reminder Days** (default: 30 days) determines how many days before a doctor's license expires that the system will send a notification.

Dr. Arjun		Document Upload	
Qualification	MD MBBS	Please upload a PDF document	
License Number	748596	Your Bill (2) (1).PDF	
Expiry Date	09/09/2025		

Figure 47: Create Doctor Document

We can access Doctor Documents from **Doctor Management -> Doctors Documents**.

New Doctor Documents ⚙️			Search...
Alen Jose Qualification: MBBS License #: kjihugfds567890 Expiry: 07/31/2025	Teena Mary Kurian Qualification: MD License #: sfsfd Expiry: 07/01/2025	Teena Mary Kurian Qualification: MD License #: 123154 Expiry: 07/09/2025	
Alen Jose Qualification: MD License #: KJHGFD98765534 Expiry: 08/02/2025	Vjs Qualification: MD License #: CSDFGH76546789 Expiry: 08/28/2025	Kid doc Qualification: MBBS License #: 87654356789 Expiry: 08/29/2025	

Figure 48: Doctor Documents

- **Doctor Appointment**

Manages patient appointments with doctors. Appointments can be created in two ways: either through the website or directly from the **Doctor Appointments** menu.


Booking through Website

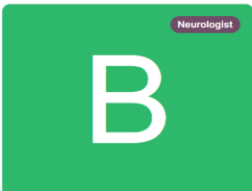
- Go to the website and browse doctors by department.


YourLogo
Find Doctors
Home
Contact us
+1 555-555-5556
Mitchell Admin
Contact Us

Book an Appointment

Filter By: All Departments ▼


Alen Jose
MBBS, MD
8 AM - 5 PM
M T W T F S S


Brain doc
MBBS
8 AM - 5 PM
M T W T F S S


Jeeson David
MBBS
8 AM - 4 PM
M T W T F S S



Kid doc
MBBS
8 AM - 5 PM
M T W T F S S

Figure 49: Book Appointments

- Select the desired doctor and click **Book Appointment**.
- Choose the preferred date, time zone, and available time slot.

Select Date

August 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Timezone: Asia/Kolkata

Available Time Slots

08:00	08:20	08:40	09:00
09:20	09:40	10:00	10:20
10:40	11:00	11:20	11:40
13:00	13:20	13:40	14:00
14:20	14:40	15:00	15:20
15:40	16:00	16:20	16:40

Book Appointment

Figure 50: Appointment Time Slot

- Enter the patient's information and confirm by clicking **Book Appointment** again.

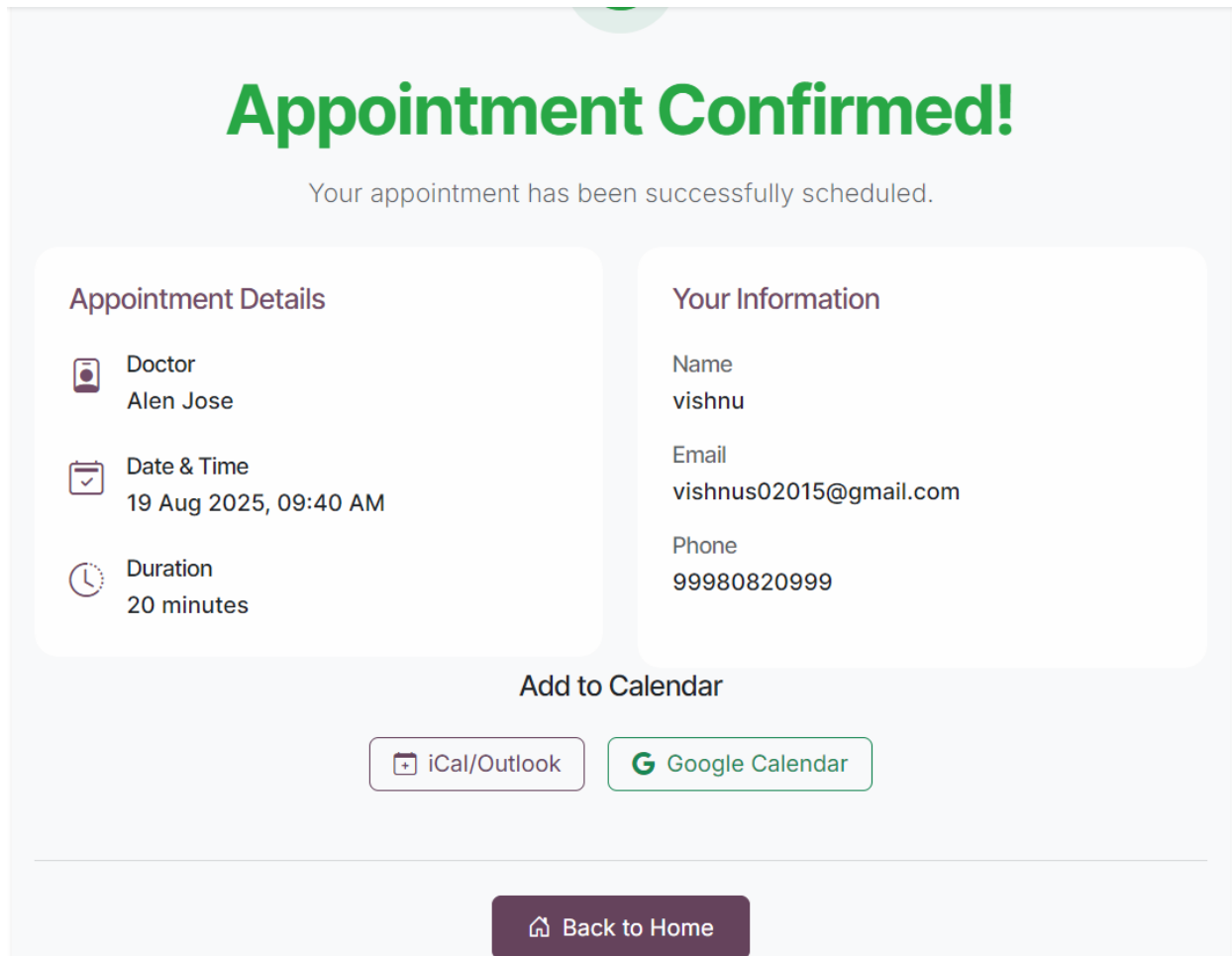


Figure 51: Appointment Confirmation

- The appointment will then be successfully booked. Patients can also add the appointment to **Google Calendar** or **Outlook** as a reminder.

Viewing Appointments

- All website bookings can be viewed from **Doctor Management** → **Appointments**.
- Appointments can also be booked directly from **Doctor Management** → **Appointments** in the backend.

New

Doctor Appointments
APP/00097

Prescriptions
0

Lab Tests
0

Create Invoice

Reset to Draft

Generate Token

Draft

Confirmed

Invoiced

Cancelled

APP/00097

Department	Cardiology	Start Time	11/05/2025 10:40:00
Doctor	Test Doctor	End Time	11/05/2025 11:00:00
Patient Name	geever	Is Follow Up	<input type="checkbox"/>
Age	14	Medical Record	MR/00013
Gender	Other	Consultation Notes ?	
Reason for Visit			
Payment Status ?	No Invoice		
Amount Due ?	500.00		

Figure 52: Doctor Appointment Confirmed

Doctor Appointments form contains:

- **Name:** Unique appointment ID
- **Doctor:** Assigned doctor
- **Patient Name:** Patient record
- **Start Datetime/End Datetime:** Appointment timing
- **State:** Draft/Confirmed/Cancelled
- **Is Follow Up:** Indicates follow-up appointment
- **Medical Record:** Medical record of the patients
- **Consultation Notes:** Detailed notes from the doctor consultation
- **Amount Due:** Shows the consultation fee charged by the doctor. After the invoice is created, the amount due will be updated accordingly.

New

Doctor Appointments / APP/00101
INV/25-26/0056

Payments

1

Customer Invoice

INV/25-26/0056

Customer

Benny

ss

ss

ss 458745

Invoice Date

11/05/2025

Due Date

11/05/2025

Journal

Customer Invoices

in

INR

Place of supply

Foreign Country (IN)

GST Treatment

Unregistered Business

Invoice Lines

Journal Items

Other Info

Product	Account	Quantity	Price	Taxes	Amount
Doctor Consultation Fee	200110 Local Sales	1.00	500.00	5% GST	₹ 500.00
Consultation - Test Doctor					

Terms and Conditions

Untaxed Amount:

₹ 500.00

Figure 53: Doctor Consultation Fee Invoiced

- **Payment status:** primarily used to display the **Payment Status** (e.g., "Not Paid", "Partially Paid", "Paid") and to show the outstanding balance on the appointment form.

Doctors can also create **Prescriptions** and **Lab Tests** directly from the **Doctor Appointments** menu.

All prescriptions and lab tests related to the patient can be viewed from this form.

4.5 Role-Based Security Management

Feature	Doctor	Nurse (All)	Receptionist (All)	Lab Technicians	Pharmacist
View Patient Records	Read-only	Read-only	Read-only	No	No
Create Patient	No	No	Yes	No	No
View Appointments	Own only	Read-only	Full	No	No
Create Appointments	yes	No	Yes	No	No
Medical Records	Read/Update (Own)	Read-only	Create/Read	No	No
Prescriptions	Full (Own)	Read-only	Access for creating invoice those who have the Invoicing access right others view only	No	Yes, viewing and dispensing the medicine from the inventory
Lab Tests	Manage (Ordered)	Read-only	No	Full	No

Feature	Doctor	Nurse (All)	Receptionist (All)	Lab Technicians	Pharmacist
Test Packages	View	View	View	View	No

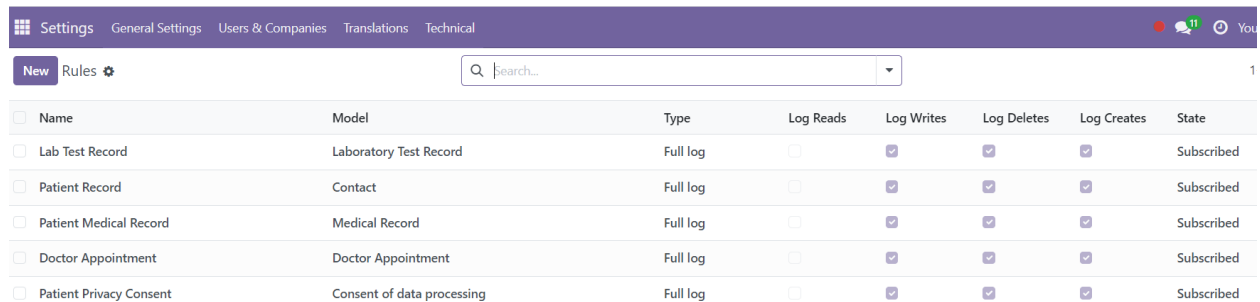
- **Sensitive Data Access Protection**

For data access protection we add audit log and privacy consent OCA module.

➤ **Audit Log**

This can be accessed from **Settings** → **Audit Log**.

You can define rules for specific models to track **Create, Read, Update, and Delete** actions on records.



Name	Model	Type	Log Reads	Log Writes	Log Deletes	Log Creates	State
<input type="checkbox"/> Lab Test Record	Laboratory Test Record	Full log	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscribed
<input type="checkbox"/> Patient Record	Contact	Full log	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscribed
<input type="checkbox"/> Patient Medical Record	Medical Record	Full log	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscribed
<input type="checkbox"/> Doctor Appointment	Doctor Appointment	Full log	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscribed
<input type="checkbox"/> Patient Privacy Consent	Consent of data processing	Full log	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscribed

Figure 54: Audit Rules

Specific models changes can be viewed from **Settings** → **Log**.

SettingsGeneral SettingsUsers & CompaniesTranslationsTechnical

Logs

Q Search...

1-6

Created on	Resource Name	Model	Resource...	Method	User
08/17/2025 22:04:29	vishnu	Contact	259	create	Mitchell Admin
08/17/2025 22:04:29	APP/00279	Doctor Appointment	282	create	Mitchell Admin
08/17/2025 13:56:48	YourCompany, Alen Jose	Contact	7	write	Mitchell Admin
08/17/2025 13:56:48	YourCompany, Alen Jose	Contact	7	write	Mitchell Admin
08/17/2025 13:56:48	YourCompany, Alen Jose	Contact	7	write	Mitchell Admin
08/17/2025 13:54:54	APP/00278	Doctor Appointment	281	write	Mitchell Admin
08/17/2025 13:52:37	APP/00278	Doctor Appointment	281	write	Mitchell Admin
08/17/2025 11:22:01	MR/00134	Medical Record	134	write	Staff Nurse - 01
08/17/2025 11:22:01	APP/00278	Doctor Appointment	281	write	Staff Nurse - 01
08/17/2025 11:22:01	APP/00278	Doctor Appointment	281	write	Staff Nurse - 01
08/17/2025 11:22:01	MR/00134	Medical Record	134	create	Staff Nurse - 01
08/17/2025 11:21:25	APP/00278	Doctor Appointment	281	create	Staff Nurse - 01
08/14/2025 19:26:10	LAB/0050	Laboratory Test Record	89	write	Mitchell Admin

Figure 55: Log Changes

➤ **Patient Privacy Consent**

This features to manage explicit consent from data subjects in compliance with data protection regulations like HIPAA. It allows tracking and managing patient consents for various data processing activities.

Hospital Management
Doctor Management
Staff Management
Patient Management
Prescription
Lab Test
Insurance
Configuration

New

Patient Privacy Activities / consent
Generated consents ⚙️

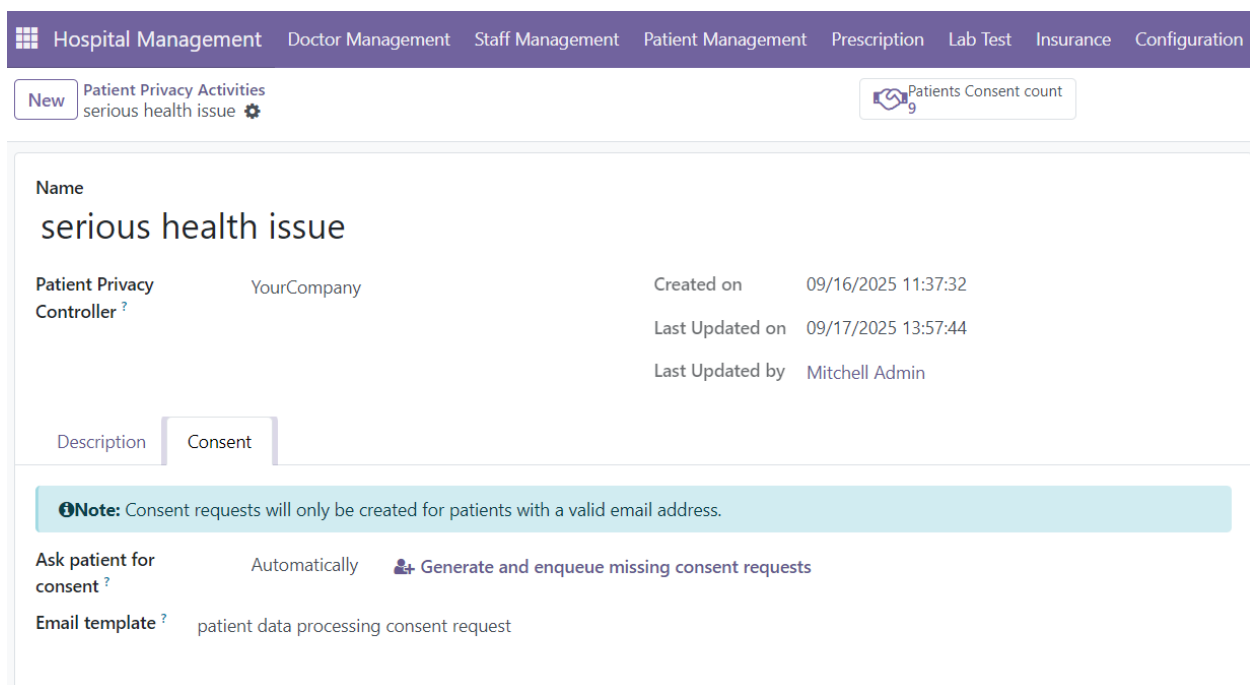
<input type="checkbox"/> Activity	Patient	State
<input type="checkbox"/> consent	arjun	Awaiting response
<input type="checkbox"/> consent	milan	Awaiting response

- Staff Types
- Nurse Specializations
- lab Technician Specializations
- Radiology Specializations
- Medical Wards
- Working Shifts
- Qualification
- Certifications
 - All Certifications
 - Certification Types
 - Certification Tags
- Patient Privacy Activities
 - All Patient Privacy Activities
 - Patient Privacy Consent
- Prescription Templates
- Medicines
- Product Brands
- Settings


Figure 56: Privacy

Setting Up Activities

1. Go to **Hospital Management->Configuration -> All Patient Privacy Activities**.
2. Create a new activity.
3. Configure consent requirements and templates.



Hospital Management Doctor Management Staff Management Patient Management Prescription Lab Test Insurance Configuration


New Patient Privacy Activities serious health issue  Patients Consent count 9

Name
serious health issue

Patient Privacy Controller YourCompany Created on 09/16/2025 11:37:32
Last Updated on 09/17/2025 13:57:44
Last Updated by Mitchell Admin

Description Consent

Note: Consent requests will only be created for patients with a valid email address.

Ask patient for consent Automatically  Generate and enqueue missing consent requests

Email template patient data processing consent request

Figure 57: Privacy Activity

Consent Collection

1. Create a Privacy Activity.
2. Manually create Privacy Consent records.
3. Notify subjects and track responses.
4. There are two options for generating consent:

1. Manually

Description
Consent

Note: Consent requests will only be created for patients with a valid email address.

Ask patient for consent ?
Manually
Generate missing draft consent requests

Email template ?
patient data processing consent request

Figure 58: Privacy Manual Consent

2. Automatically

Description
Consent


Note: Consent requests will only be created for patients with a valid email address.

Ask patient for consent ?
Automatically
Generate and enqueue missing consent requests

Email template ?
patient data processing consent request

Figure 59: Privacy Automatic Consent

- If you select Manual:**
Patient consent must be generated manually. After clicking “**Generate Missing Draft Consent Requests**”, the system will create the required patient consents. The admin can then view all user consents and send consent requests via email.
- If you select Automatic:**
Patient consent will be created automatically, and an email will be sent to the patient through a scheduled cron job. Additionally, if a new patient record is created, you can manually generate consent by clicking “**Generate and Enqueue Missing Consent Requests**”. This will create the patient consent and send the consent request via email.


Patient Consents 

Search...

1-9 / 9

Activity	Patient	State	Accepted
<input type="checkbox"/> serious health issue	lekshman	Answered	<input checked="" type="checkbox"/>
<input type="checkbox"/> serious health issue	oo	Awaiting response	<input type="checkbox"/>
<input type="checkbox"/> serious health issue	ttest	Awaiting response	<input type="checkbox"/>
<input type="checkbox"/> serious health issue	a4	Awaiting response	<input type="checkbox"/>
<input type="checkbox"/> serious health issue	aaa	Awaiting response	<input type="checkbox"/>
<input type="checkbox"/> serious health issue	ff	Awaiting response	<input type="checkbox"/>
<input type="checkbox"/> serious health issue	lll	Awaiting response	<input type="checkbox"/>
<input type="checkbox"/> serious health issue	Kurian	Draft	<input type="checkbox"/>
<input type="checkbox"/> serious health issue	poppy	Draft	<input type="checkbox"/>

Figure 60: Patients Consents Raised

Patient Consents
lekshman 

1 / 1

Ask for consent

Draft Awaiting response Answered

Patient [?] lekshman


Activity serious health issue

Accepted [?] ☒

Last Metadata [?] User agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/140.0.0.0 Safari/537.36
Remote IP: 10.10.100.34
Date and time: 2025-09-18 10:09:45

Send message Log note

Today

Public user  Today at 3:39 PM
Acceptance status updated by Patient

- User agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/140.0.0.0 Safari/537.36 Remote IP: 10.10.100.34 Date and time: 2025-09-18 10:09:42 → User agent: Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/140.0.0.0 Safari/537.36 Remote IP: 10.10.100.34 Date and time: 2025-09-18 10:09:45 (Last Metadata)


Public user  Today at 3:39 PM

Figure 61: Privacy Consent Request

- From the email, users can review the consent request.

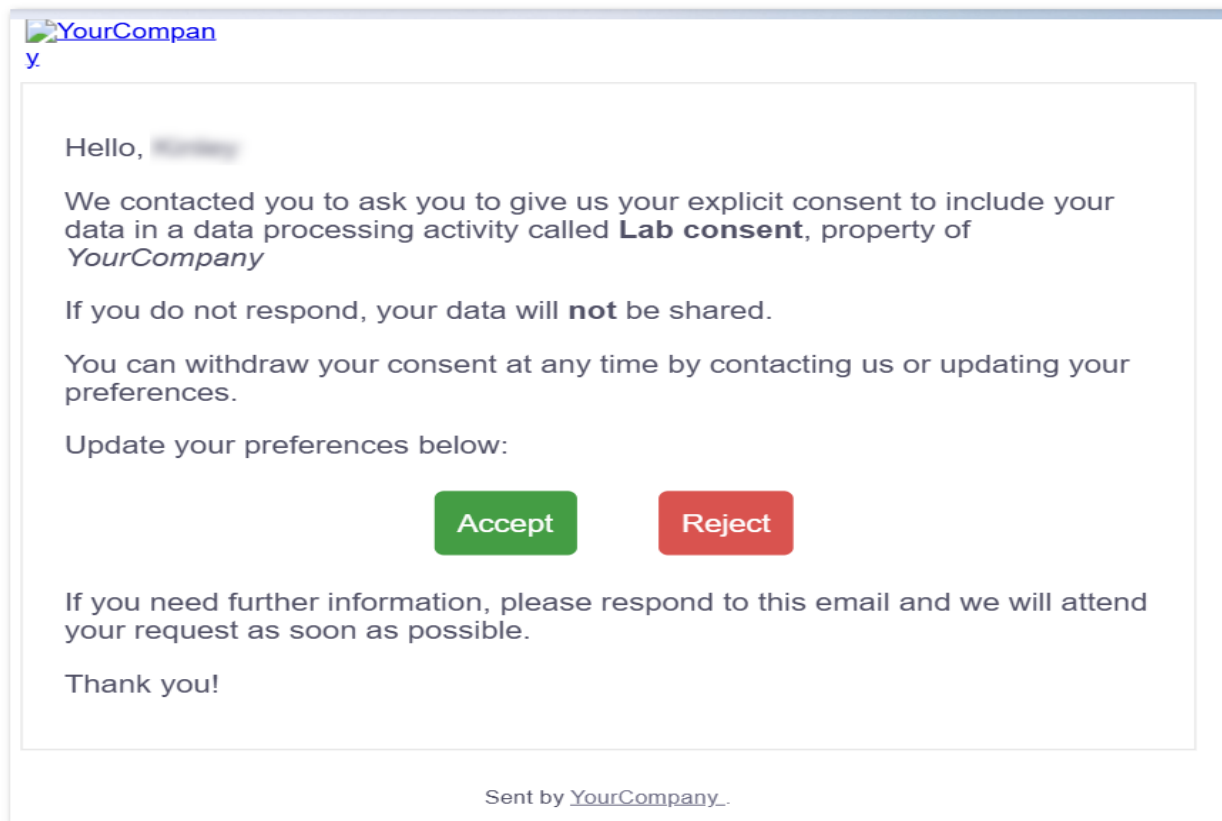


Figure 62: Privacy Consent Email

- Once the user accepts via email, the consent records will be automatically updated.



Figure 63: Privacy Consent Email Accepted

- We can also view and create consent from the patient profile.

New Patients Kurian

Appointments 10

Medical Records 2

Lab Tests 3

Consents 1

Print Patient Card

Create Appointment

Claim Insurance

Create Privacy Consent

PAT/00007

Name Kurian

Gender Male

Phone 7485963214

Blood Group A+

Email abc@gmail.com

Language ? English (US)

Date Of Birth 06/12/2008

Age 17

Personal Information

Other Information

Life Styles

Status & Family

Insurance & Doctor

Additional Notes

Address

Street...

Street 2...

City ZIP State

Country

Emergency Contact Name

Emergency Contact Phone

Figure 64: View and create individual consent

- For data protection, we added a **Security PIN** for sensitive fields such as the user's email and phone number. The PIN is configured in the **Company settings**.

Company Name

YourCompany

General Information

Branches

Security

Unmasking PIN

....

Figure 65: Pin Hidden

- To view or update a user's email/phone number, the system requires entering the PIN.

Work Phone *****6789 

Work Mobile *****6130 

Figure 66: Email/Phone Number Hidden

Enter Security PIN
×

Please enter the 4-digit security PIN to proceed.

Confirm

Cancel

Figure 67: Security Pin Request

4.6 Token Management

This is an additional **add-on module** that needs to be purchased along with the Hospital Management system.

This module is a comprehensive queue and token management system designed to manage Patients flow in physical locations.

After purchasing the Token Management system, you need to enable it from: **Hospital Management** → **Configuration** → **Settings** → **Token Management** to access all the Token Management features.

- ☒ **Token Management**
Enable or disable token management features throughout the system.

Figure 68: Token Management Enabling

Before creating a token, some configurations need to be set up in Token Management. The Token Management menu can be accessed from Menu → Token Management.

Note:

The token interface and the token counter must have the same name for the token to be generated.

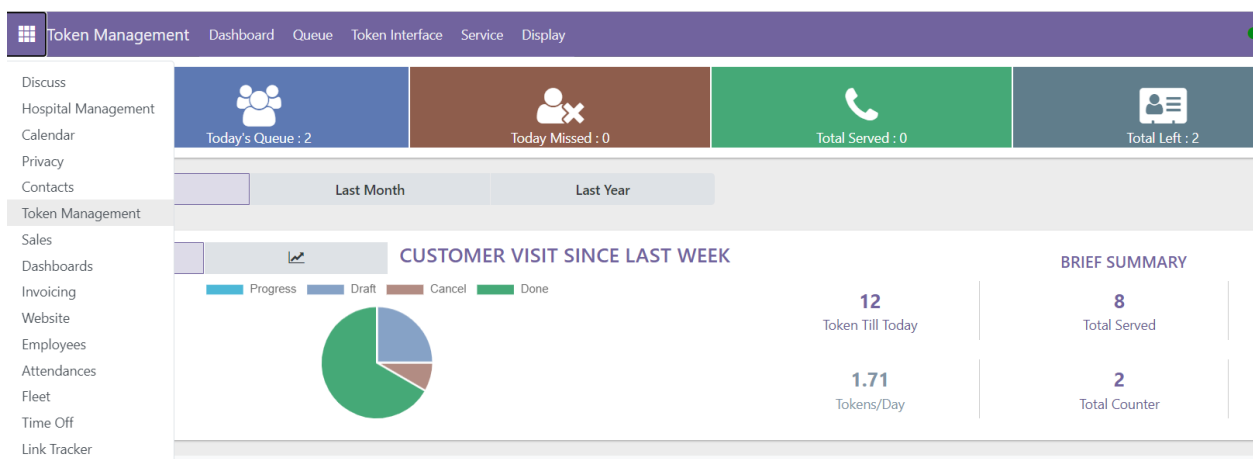


Figure 69: Token Management View

1. First, open a counter from **Token Management** → **Queue** → **Counters** to view all the queue listings.

New Queue Counters ⚙️

🔍 Search...

Counter Main

Unused

No User

Start Processing

Counter 1

In Progress

Mitchell Admin

Open Close Last Closing Date 08/14/2025

Figure 70: Token Queue Counter

2. Services are created corresponding to different departments for doctor consultations in PITS Hospital Management System (HMS) automatically.

New Service ⚙️

🔍

Search...

▼

1-13 / 11

<input type="checkbox"/> Service	Code	Parent service	Ir Seq Code	Priority
<input type="checkbox"/> UROL	UROL		qms.UROLUROL	Low
<input type="checkbox"/> PHYS	PHYS		qms.PHYSPHYS	Low
<input type="checkbox"/> ORTH1	ORTH1		qms.ORTH1ORTH1	Low
<input type="checkbox"/> ORTH	ORTH		qms.ORTHORTH	Low
<input type="checkbox"/> NEUR	NEUR		qms.NEURNEUR	Low
<input type="checkbox"/> NEPH	NEPH			Low
<input type="checkbox"/> LABO	LABO		qms.LABOLABO	Low
<input type="checkbox"/> HEAR	HEAR		qms.HEARHEAR	Low
<input type="checkbox"/> General Queue	GEN		qms.General QueueGEN	Low
<input type="checkbox"/> ENT	ENT		qms.ENTENT	Low
<input type="checkbox"/> COSM	COSM		qms.COSMCOSM	Low
<input type="checkbox"/> CARD	CARD		qms.CARDCARD	Low
<input type="checkbox"/> BAA	BAA		qms.BAABAA	Low

Figure 71: Services

- These services will be available while generating tokens, which can be accessed from **Token Management** → **Token Generation**.

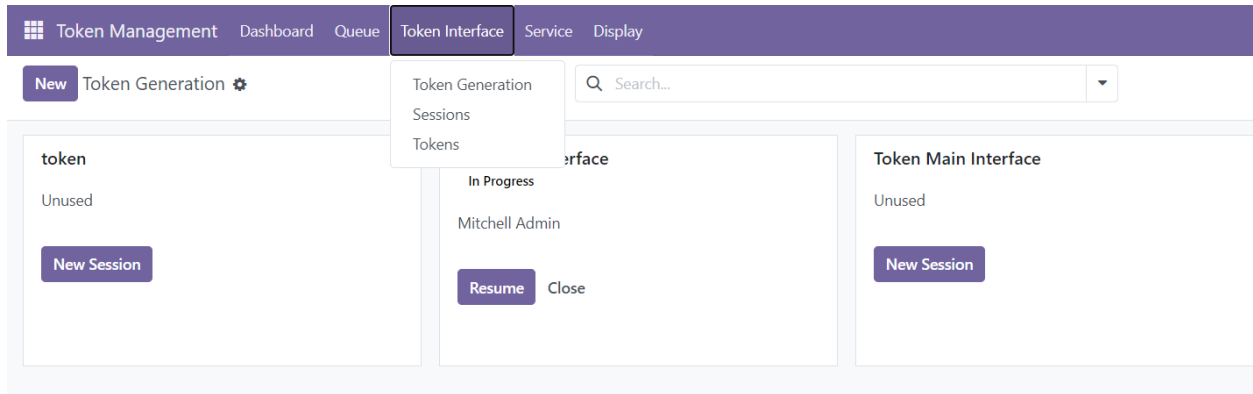


Figure 72: Token Interface Menu

- By clicking on **Resume**, you can view the services (doctor departments) and generate a token for the patient's department.

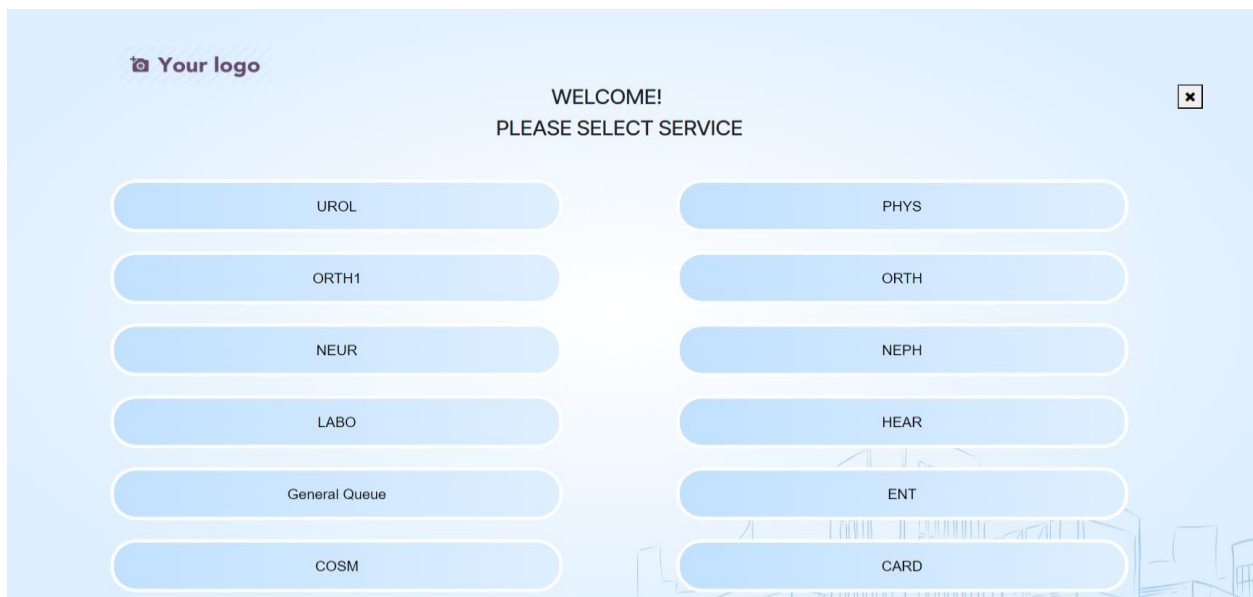


Figure 73: Token Generation Services

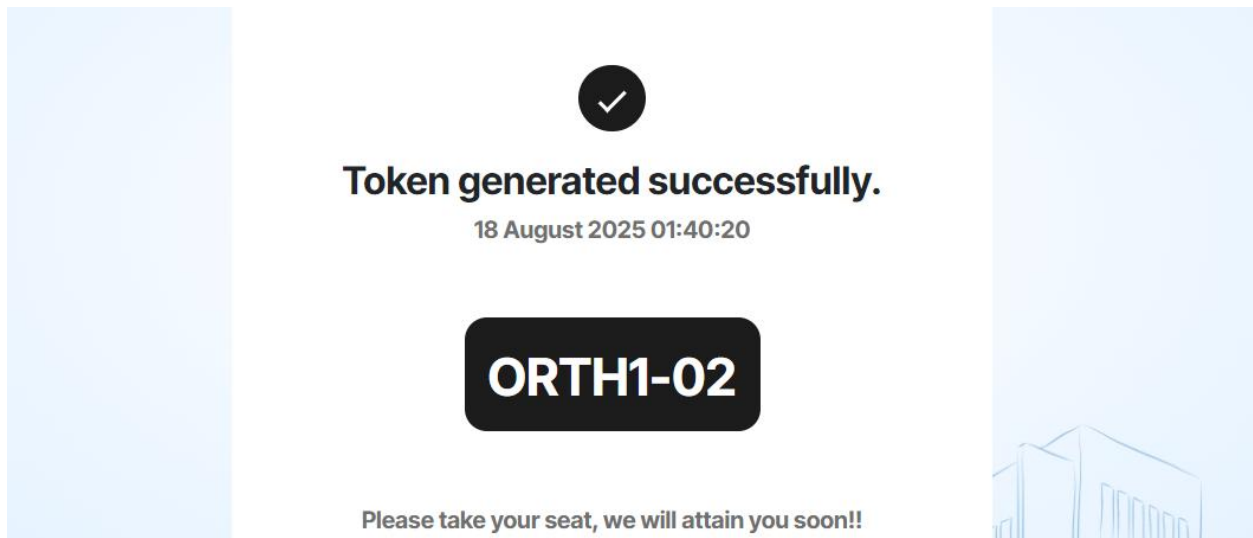




Figure 74: Token Generated View

- The generated tokens can be viewed by clicking the **Resume** button under **Token Management** → **Queue** → **Counters**. By clicking on the **Call Next** button, the next token in the queue will be called.


Mitchell Admin


17 Aug 2025

Counter
Counter 1
Service(s)

UROL

PHYS

ORTH1

ORTH

NEUR

NEPH

LABO

HEAR

General Queue

ENT

COSM

CARD

BAA

Current Token:
-
Previous Token:
CARD-02

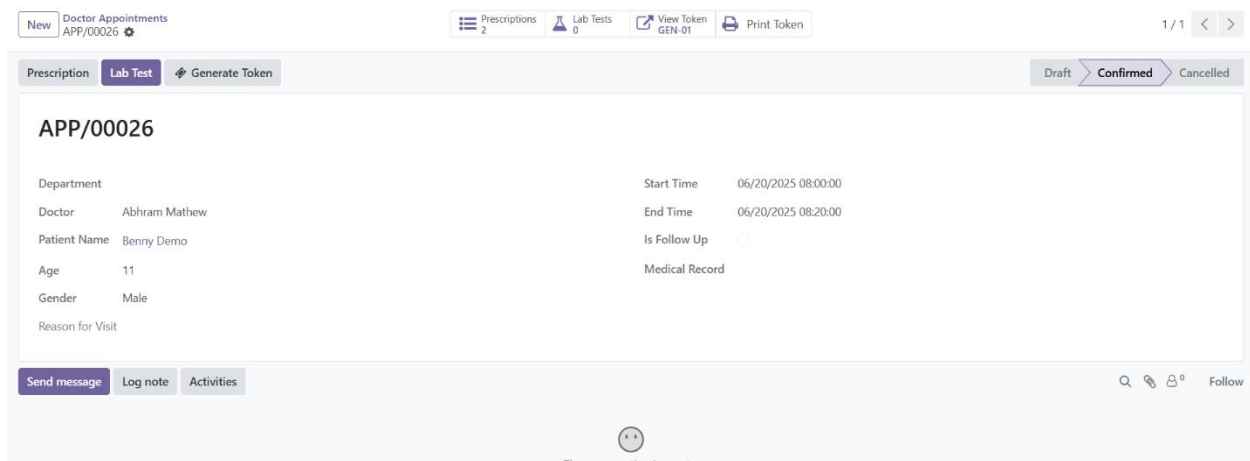
CALL NEXT

Queue Listing

Token No.	Counter	Service	Priority	Called
ORTH1-02	-	ORTH1	Low	-
ORTH1-01	-	ORTH1	Low	-
GEN-01	-	General Queue	Low	-
002	-	NEPH	Low	-

Figure 75: Queue Listing View

6. After completing the configuration setup, tokens can also be generated directly from **Doctor Appointments** by clicking the **Generate Token** button. Make sure that Queue Counters and corresponding Token Interface display should be open for creating the tokens.



New Doctor Appointments APP/00026

Prescriptions 2 Lab Tests 0 View Token GEN-01 Print Token

1 / 1 < >

Prescription Lab Test Generate Token

Draft Confirmed Cancelled

APP/00026

Department Start Time 06/20/2025 08:00:00

Doctor Abraham Mathew End Time 06/20/2025 08:20:00

Patient Name Benny Demo Is Follow Up ☐

Age 11 Medical Record

Gender Male

Reason for Visit

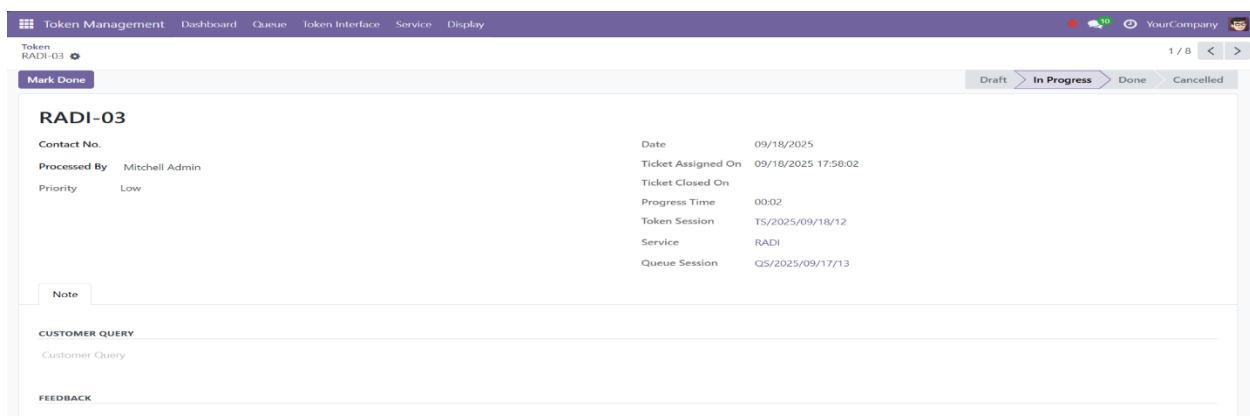
Send message Log note Activities

Search Follow

This reservation is empty

Figure 76: Generate Token / View Token Button

7. Once generated, the token can be viewed by clicking the **View Token** button. The token will be created and assigned to the respective counter.



Token Management Dashboard Queue Token Interface Service Display

Token RADI-03

1 / 8 < >

Mark Done

Draft In Progress Done Cancelled

RADI-03

Contact No. Date 09/18/2025

Processed By Mitchell Admin Ticket Assigned On 09/18/2025 17:58:02

Priority Low Ticket Closed On

Progress Time 00:02

Token Session TS/2025/09/18/12

Service RADI

Queue Session QS/2025/09/17/13

Note

CUSTOMER QUERY

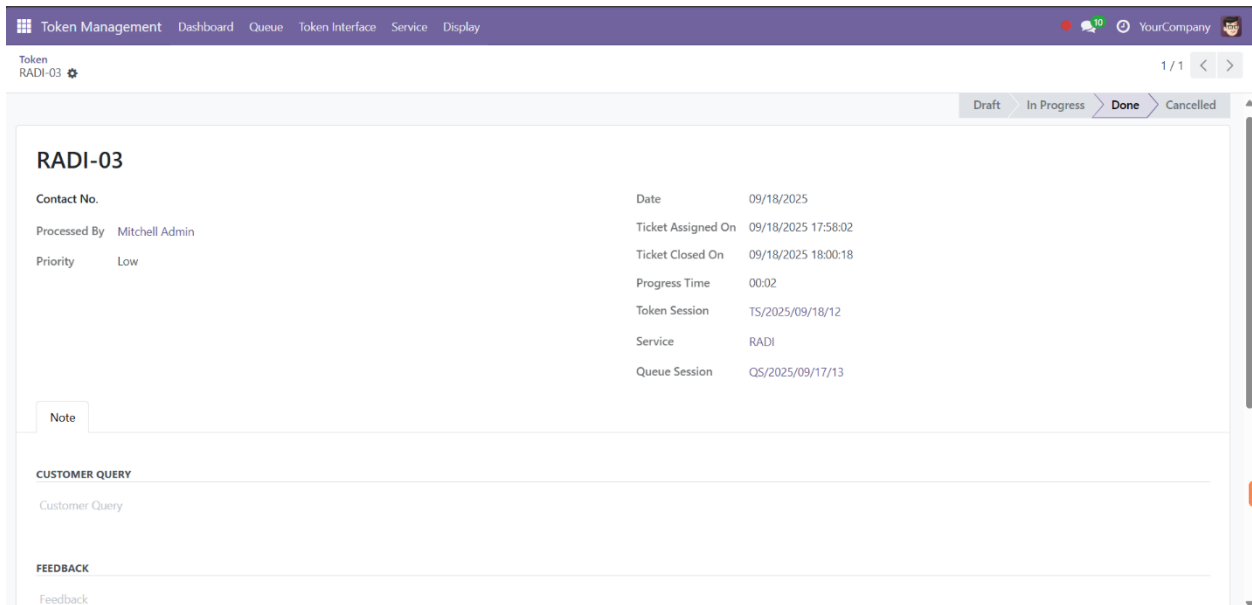
Customer Query

FEEDBACK

Feedback

Figure 77: Token Details View

8. After a new token is called, the current token's state will be changed to **Done**.



The screenshot shows the 'Token Management' interface. The top navigation bar includes 'Token Management', 'Dashboard', 'Queue', 'Token Interface', 'Service', and 'Display'. The user is logged in as 'YourCompany'. The main content area shows the details for token 'RADI-03'. The status is 'Done'. The token details include:

- Contact No.
- Processed By: Mitchell Admin
- Priority: Low
- Date: 09/18/2025
- Ticket Assigned On: 09/18/2025 17:58:02
- Ticket Closed On: 09/18/2025 18:00:18
- Progress Time: 00:02
- Token Session: TS/2025/09/18/12
- Service: RADI
- Queue Session: QS/2025/09/17/13

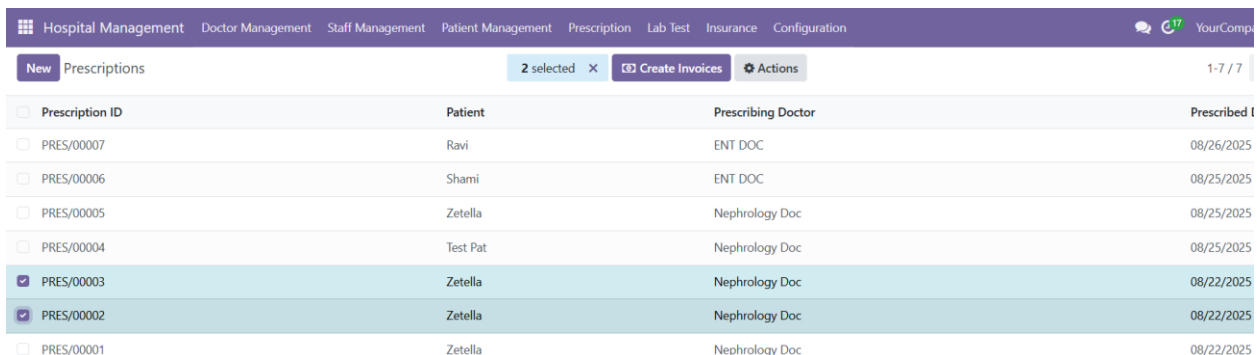
Below the details, there are sections for 'Note', 'CUSTOMER QUERY', and 'FEEDBACK'.

Figure 78: Token Status

4.7 Invoicing Prescriptions

Creating an Invoice

1. Select one or more confirmed prescriptions of the same patient
2. Click **Create Invoice**



The screenshot shows the 'Hospital Management' interface. The top navigation bar includes 'Hospital Management', 'Doctor Management', 'Staff Management', 'Patient Management', 'Prescription', 'Lab Test', 'Insurance', and 'Configuration'. The user is logged in as 'YourCompany'. The main content area shows a list of prescriptions. Two prescriptions are selected (highlighted in blue):

Prescription ID	Patient	Prescribing Doctor	Prescribed I
<input type="checkbox"/> PRES/00007	Ravi	ENT DOC	08/26/2025
<input type="checkbox"/> PRES/00006	Shami	ENT DOC	08/25/2025
<input type="checkbox"/> PRES/00005	Zetella	Nephrology Doc	08/25/2025
<input type="checkbox"/> PRES/00004	Test Pat	Nephrology Doc	08/25/2025
<input checked="" type="checkbox"/> PRES/00003	Zetella	Nephrology Doc	08/22/2025
<input checked="" type="checkbox"/> PRES/00002	Zetella	Nephrology Doc	08/22/2025
<input type="checkbox"/> PRES/00001	Zetella	Nephrology Doc	08/22/2025

Figure 79: Invoice Creation

3. System will:

- Create a draft invoice
- Add all prescription items as invoice lines

4. Review and post the invoice

New

Prescriptions / PRES/00003

INV/25-26/0007

Prescriptions

1 record

Send

Print

Pay

Preview

Credit Note

Reset to Draft

Draft

Posted

Customer Invoice

INV/25-26/0007

Customer

Zetella

Invoice Date

09/22/2025

Place of supply

Foreign Country (IN)

Due Date

09/22/2025

GST Treatment

Unregistered Business

Currency

INR

Invoice Lines

Other Info

Product	Quantity	Price	Taxes	Amount
Dolo	1.00	1.00	5% GST	₹ 1.00
Glucose	1.00	1.00	5% GST	₹ 1.00

Terms and Conditions

Untaxed Amount:

₹ 2.00

SGST:

₹ 0.06

CGST:

₹ 0.06

Figure 80: Invoice View

The payment status of a particular invoice can be tracked on its related invoice.

New

Prescriptions
PRES/00003

Invoices
1

Print Prescription

Cancel

Dispense

Draft

Confirmed

Invoiced

Dispensed

Cancelled

Prescription ID	PRES/00003	Prescribed Date	08/22/2025 14:39:24
Patient	Zetella	Appointment	APP/00005
Prescribing Doctor	Nephrology Doc	Medical Record	
Prescription Template		Stock Picking	WH/OUT/00006

Prescription

Notes

Payment Status

Payment Status ? Not Paid

Figure 81: Payment Status

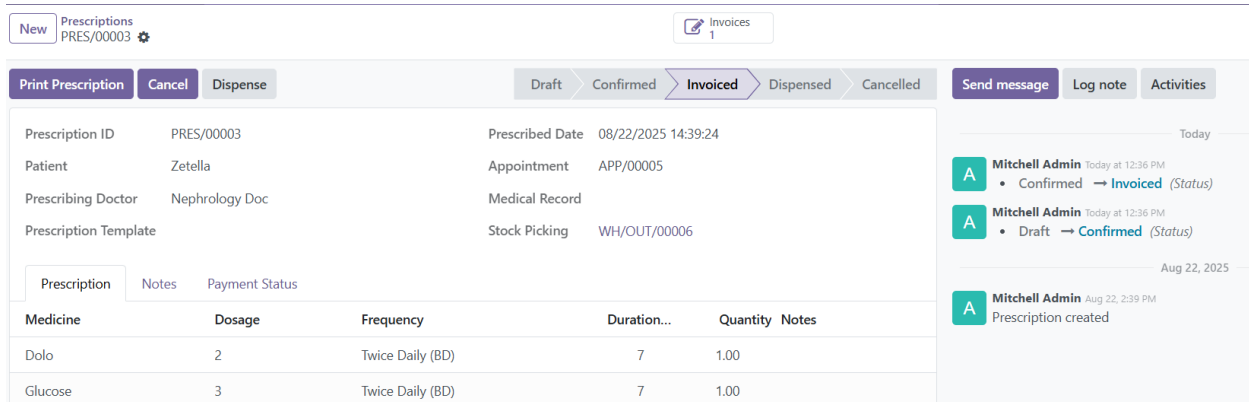
Invoice Features

- Automatic application of patient-specific pricing
- Support for discounts and taxes
- Integration with accounting module
- Payment tracking

4.8 Dispensing Medications

Dispensing Process

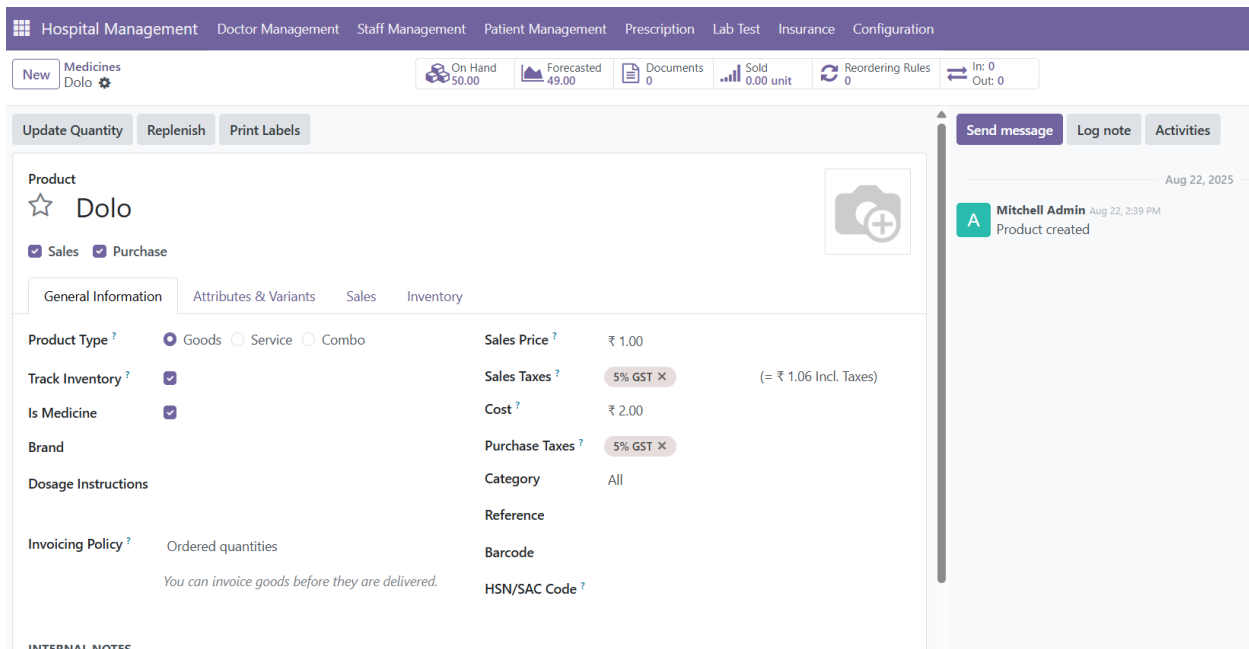
1. From a confirmed prescription the Forecasted quantity of the medicine will be updated.



The screenshot shows the 'Prescriptions' form in Odoo. The 'Invoiced' status is selected in the top bar. The form displays details for Prescription ID PRES/00003, Patient Zetella, and Prescribing Doctor Nephrology Doc. A table lists the medicines: Dolo (Dosage 2, Frequency Twice Daily (BD), Duration 7, Quantity 1.00) and Glucose (Dosage 3, Frequency Twice Daily (BD), Duration 7, Quantity 1.00). The right sidebar shows a log of activities, including 'Prescription created' by Mitchell Admin.

Medicine	Dosage	Frequency	Duration...	Quantity	Notes
Dolo	2	Twice Daily (BD)	7	1.00	
Glucose	3	Twice Daily (BD)	7	1.00	

Figure 82: Confirmed Invoice Stock Picking



The screenshot shows the 'Medicines' form in Odoo. The 'Forecasted' status is selected in the top bar. The form displays details for the product 'Dolo', including its sales and purchase status, product type (Goods), sales price (₹ 1.00), sales taxes (5% GST), cost (₹ 2.00), purchase taxes (5% GST), category (All), and invoicing policy (Ordered quantities). The right sidebar shows a log of activities, including 'Product created' by Mitchell Admin.

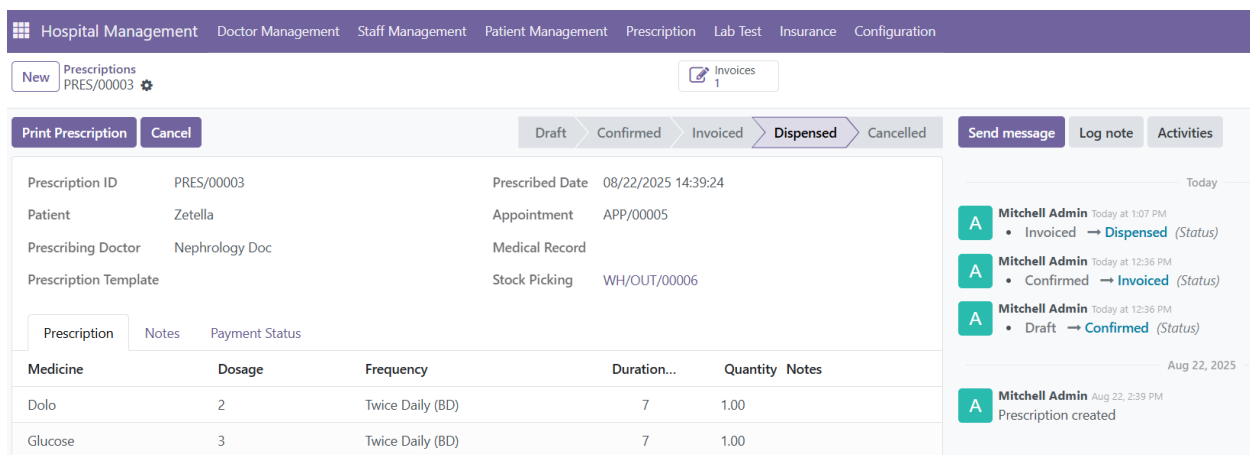
Product	Dolo
Sales	On Hand 50.00, Forecasted 49.00, Documents 0, Sold 0.00 unit, Reordering Rules 0, In: 0, Out: 0
General Information	Product Type: Goods, Track Inventory: <input checked="" type="checkbox"/> , Is Medicine: <input checked="" type="checkbox"/> , Brand, Dosage Instructions, Invoicing Policy: Ordered quantities
Sales	Sales Price: ₹ 1.00, Sales Taxes: 5% GST, Cost: ₹ 2.00, Purchase Taxes: 5% GST, Category: All, Reference, Barcode, HSN/SAC Code

Figure 83: Forecasted Quantity Update

2. System will:

1. Create a stock picking.
2. Reserve the required quantities.
3. Update prescription status.

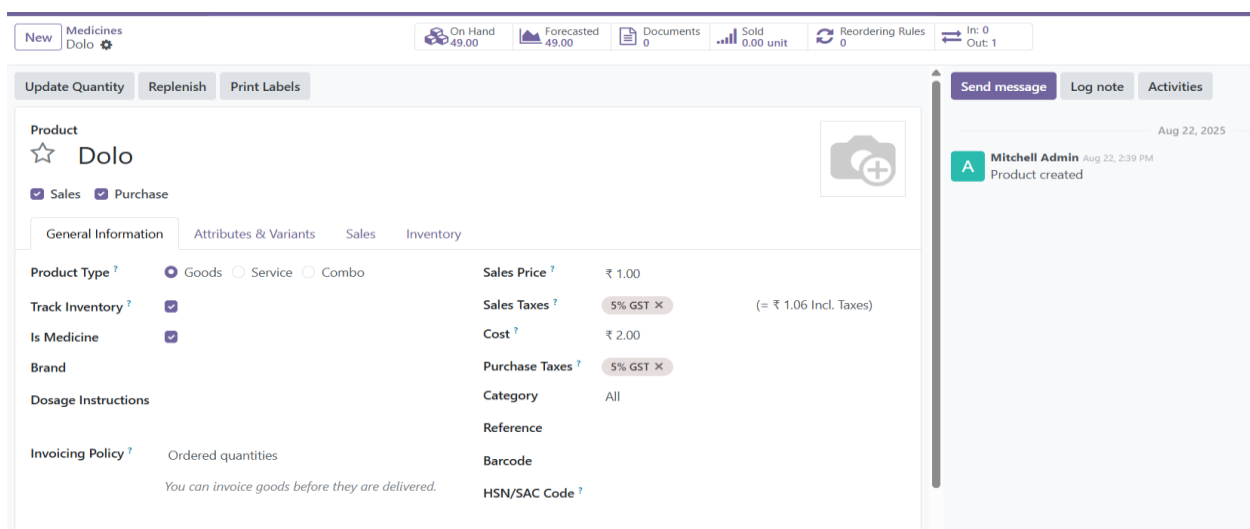
3. After that, click on **Dispense**, the On Hand quantity of that medicine will be updated.



Prescription ID: PRES/00003
 Patient: Zetella
 Prescribing Doctor: Nephrology Doc
 Prescription Template: WH/OUT/00006

Medicine	Dosage	Frequency	Duration...	Quantity	Notes
Dolo	2	Twice Daily (BD)	7	1.00	
Glucose	3	Twice Daily (BD)	7	1.00	

Figure 84: Prescription Medicine Dispensed View



Product: Dolo

Product Type: ☒ Goods ☐ Service ☐ Combo

Track Inventory: ☒

Is Medicine: ☒

Brand:

Dosage Instructions:

Invoicing Policy:

Sales Price: ₹ 1.00

Sales Taxes: 5% GST X (= ₹ 1.06 Incl. Taxes)

Cost: ₹ 2.00

Purchase Taxes: 5% GST X

Category: All

Reference:

Barcode:

HSN/SAC Code:

Figure 85: On Hand Quantity Update

Medicine Low Stock Alert Configuration

1. Enable Notifications

- Navigate to Settings > Hospital Settings > Enable Medicine Low Stock Notifications.

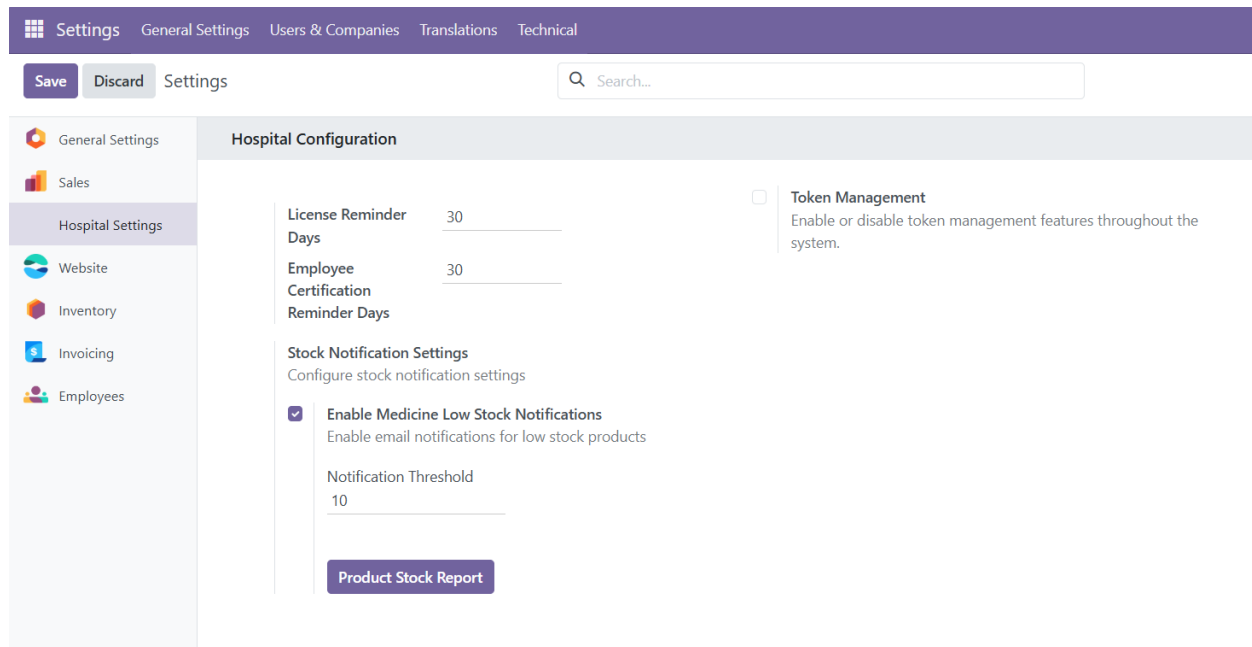


Figure 86: Notification Enable

2. Set Global Threshold

- Set the threshold value (default: 10). We can download Medicine Stock report from the setting.

3. Set Category/Product Thresholds (Optional)

- Go to Inventory > Products > Categories
- Set Default Min Quantity for automatic threshold application to all products in the category
- OR set individual Min Quantity on specific products
- Priority will first check the Medicine category's minimum quantity. If not found, it will check the Medicine product's minimum quantity. If that is also not found, it will check the threshold value set in Settings.

New

Medicines

antibiotic

On Hand

29.00 Units

Forecasted

24.00 Units

Documents

0

Sold

0.00 Units

More

☆

antibiotic

✓ Sales ?

✓ Purchase ?

General Information

Attributes & Variants

Sales

Inventory

Accounting

Product Type ?

● Goods

○ Service

○ Combo

Sales Price ?

\$ 20.00

per Units

Invoicing Policy ?

Ordered quantities

Sales Taxes ?

Track Inventory ?

✓

Cost ?

\$ 0.00

per Units

Is Medicine ?

✓

Purchase Taxes ?

Brand ?

cipila

Category ?

All

Dosage Instructions ?

Reference ?

Barcode ?

Medicine Minimum Quantity ?

0

?

You can invoice goods before they are delivered.

INTERNAL NOTES

This note is only for internal purposes.

Figure 87: Medicine Product's Minimum Quantity

New

Medicines / antibiotic

All

Products

39

Category ?

All

Parent Category ?

Medicine Minimum Quantity ?

0

ACCOUNT PROPERTIES

Income Account ?

400000 Product Sales

Expense Account ?

600000 Expenses

Downpayment Account ?

LOGISTICS

Force Removal Strategy ?

INVENTORY VALUATION

Costing Method ?

Standard Price

Figure 88: Medicine Category's Minimum Quantity

4. Assign Stock Managers

- Go to **Settings > Users & Companies > Groups**
- Add users to the "**Inventory / Manager**" group to receive notifications
- Or go to **Settings > Users & Companies > Users** and set the user as **Inventory Administrator**.

New

Users

rahul

Groups

7

Access Rights

214

Record Rules

41

Employee

1

Related Partner ?

rahul

Access Rights

Preferences

Account Security

USER TYPE

User types ?

☒ Internal User
 ☐ Portal
 ☐ Public

SALES

Sales ?

ACCOUNTING

Invoicing ?

Bank ?

INVENTORY

Inventory ?

WEBSITE

Website ?

HUMAN RESOURCES

Employees ?

PRODUCTIVITY

Dashboard ?

Figure 89: User View

New	Groups	Inventory / Administrator	
Application ?	Inventory		
Name ?	Administrator		
Share Group ?	<input type="checkbox"/>		
API Keys maximum duration days ?	0.00		
Users	Inherited	Menus	Views
Access Rights	Record Rules	Notes	
Name	Login	Language	Latest authenticati... Status
Marc Demo	demo	English (US)	Never Connected
Mitchell Admin	admin	English (US)	09/25/2025 13:16:01 Confirmed
Add a line			

Figure 90: Group View

5. A cron job is set to automatically check stock levels daily, and an email will be sent with a CSV file attached containing the medicine stock details.

New Scheduled Actions

Check Stock Levels

Run Manually

Check Stock Levels

TECHNICAL SETTINGS

Model ? Quants

Allowed Groups ?

Available on the Website ? ☐

ACTION DETAILS

Scheduler User ? OdooBot

Execute Every ? 1 Days

Active ? ☒

Next Execution Date ? 10/01/2025 18:02:35

Priority ? 5

Code Help

1 model._check_low_stock()

Figure 91: Cron Job

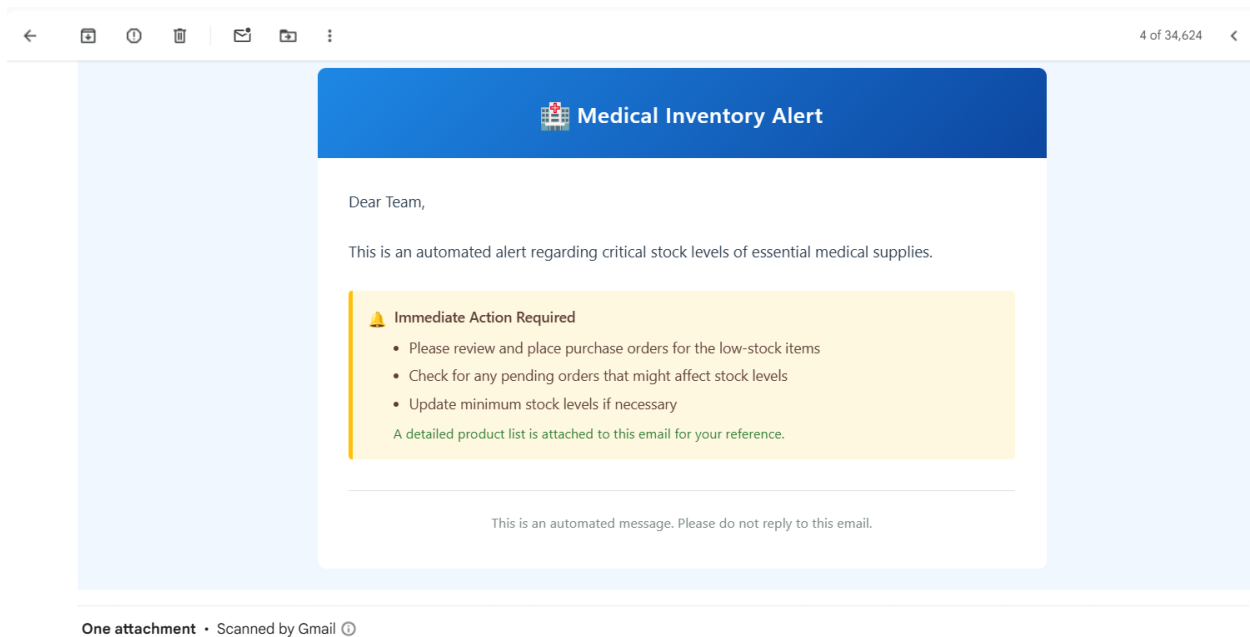


Figure 92: Email Notification

5. HIPAA Compliance

This software is designed to support healthcare operations and includes configurable technical safeguards intended to assist customers in meeting HIPAA security requirements. However, full HIPAA compliance depends on how the software is deployed, configured, managed, and used by the customer, along with their internal administrative, legal, and operational controls. Additional information about HIPAA compliance can be found in the license file provided within the plugin package.

6. Technical Requirements & Compatibility:

- Fully compatible with **Odoo 18.0 Community Edition**.
- **Token Management Feature** requires the purchase of an additional add-on module.
- **Dependencies:** Odoo HR, Website, Product, and Mail modules, along with Odoo Community Association (OCA) modules — *Audit Log*.

7. Change Log / Release Notes

- **Version 1.1.0 – December 2025**
 - Introduced **Prescription and Lab Test Invoicing** features.
 - Added **Medicine Stock Tracking** functionality for better inventory management.
 - Implemented **Digital Signature** support for staff members to enhance authentication and approval workflows.
- **Version 1.0.0 – September 2025**
 - **Initial release** of the module with core functionalities.

8. Support

If you have questions, use our contact form at webshopextension.com or email at support@webshopextension.com.