User Manual

Hospital Management System for Odoo v18.0

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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.

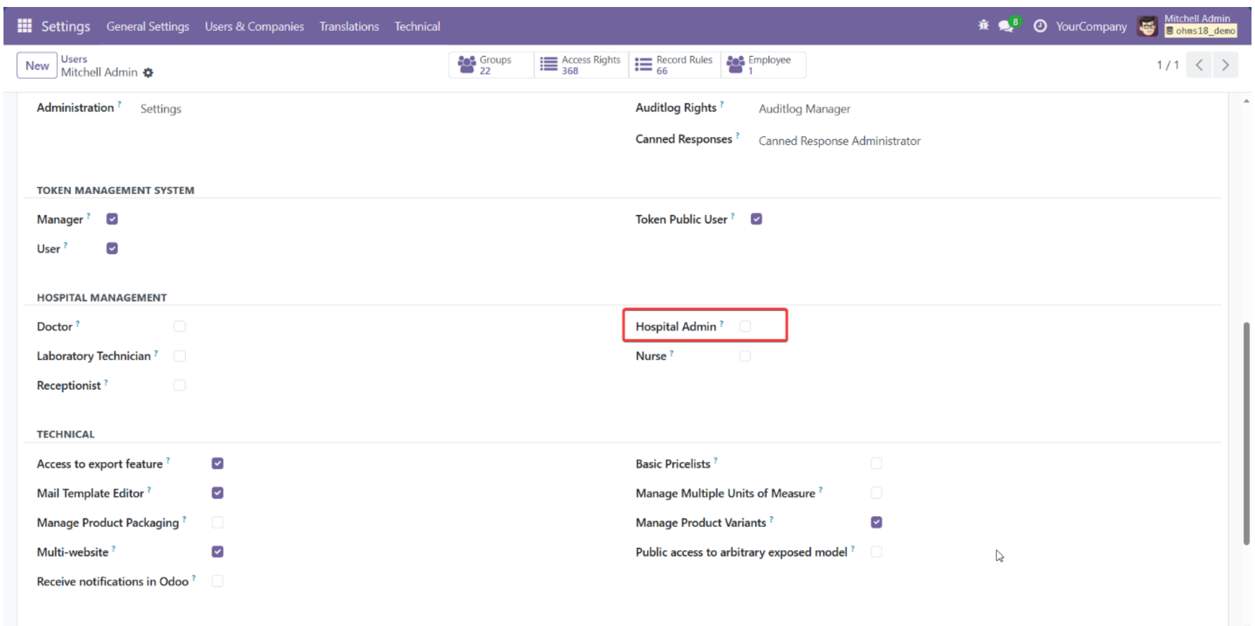


Figure 1: Configuration Setup

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.

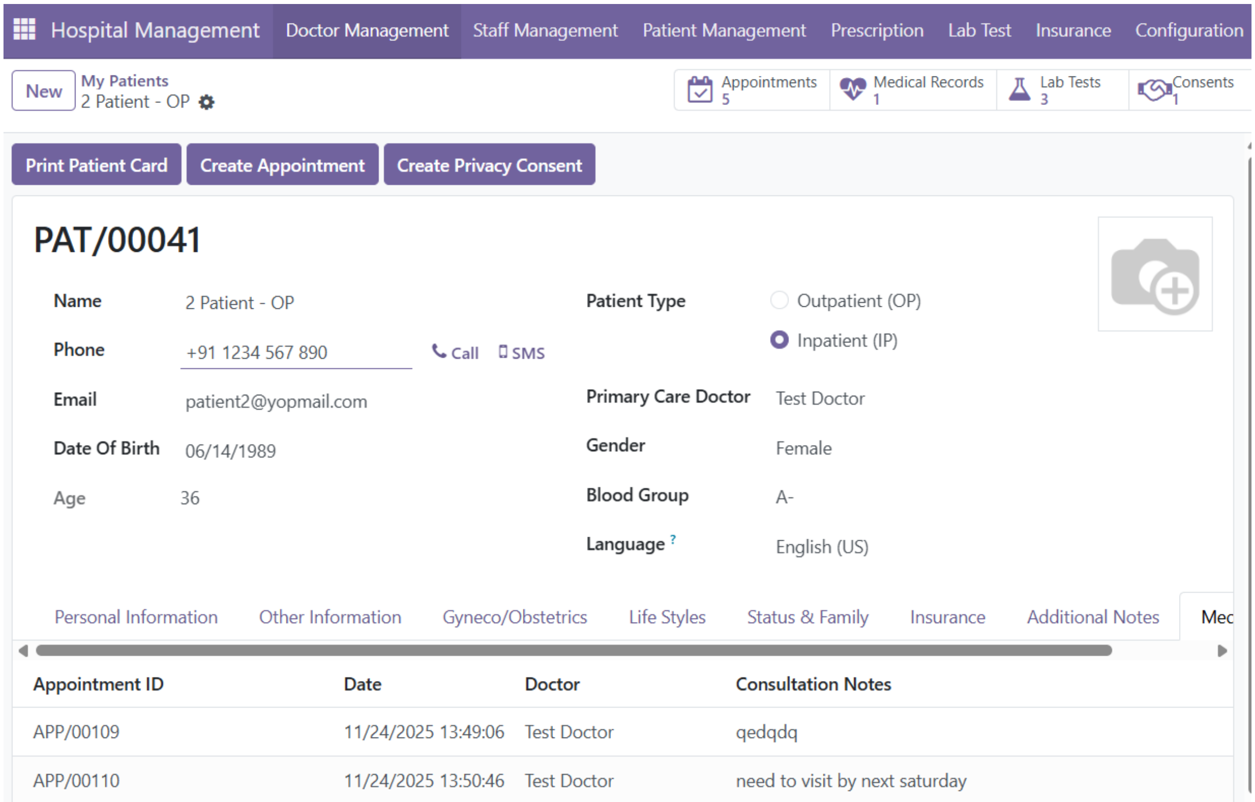


Figure 2: Patient View

- ## Buttons

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

Figure 3: Patient ID Card

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

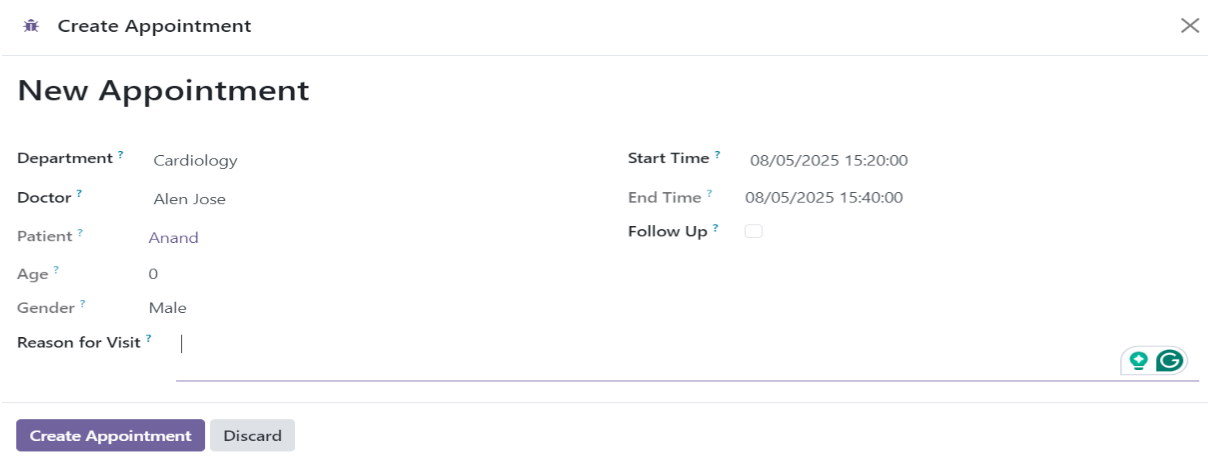
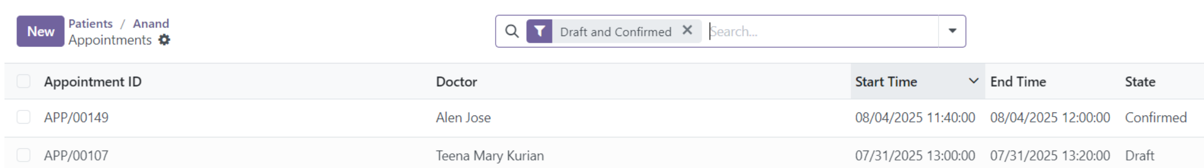


Figure 4: Create Appointment View

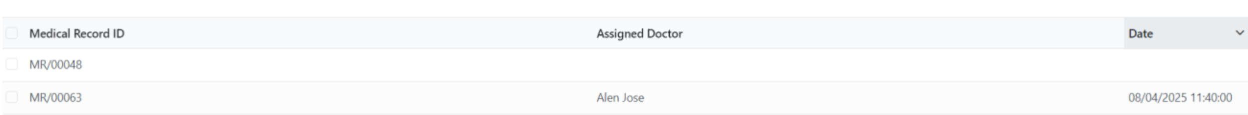
- **Appointments Button:** This view is showing all the appointments of that patient



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



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.

Test Number	Patient	Referring Doctor	Test Date	Report On	Total Amount	Status
LAB/0003	Anand	Jeeson David	08/01/2025	08/05/2025	800.00	Confirmed
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.

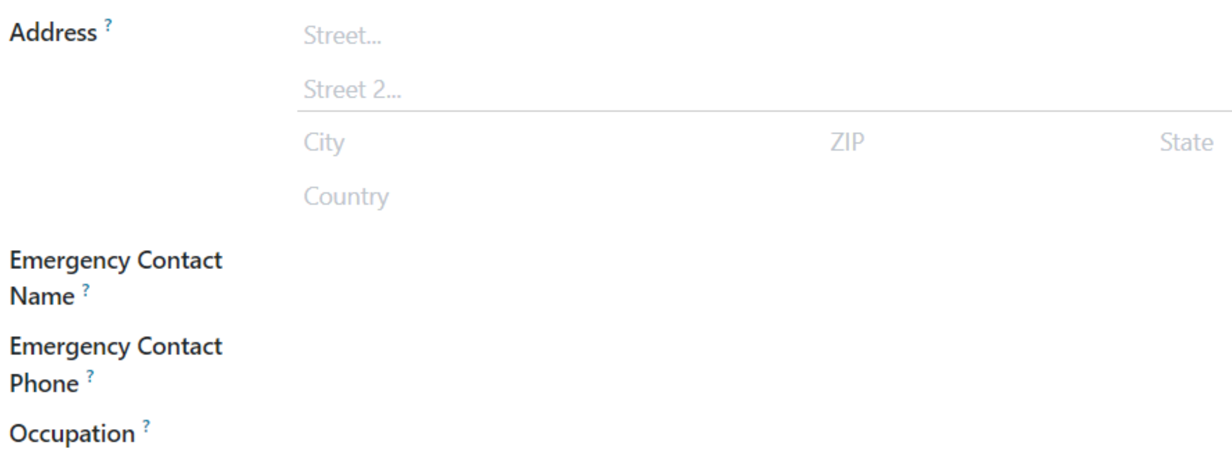


Figure 8: Patient Personal Info

- **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.**

Figure 9: Other Information

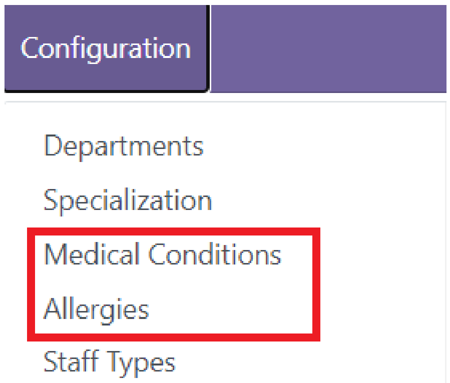


Figure 10: Medical Conditions / Allergies

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

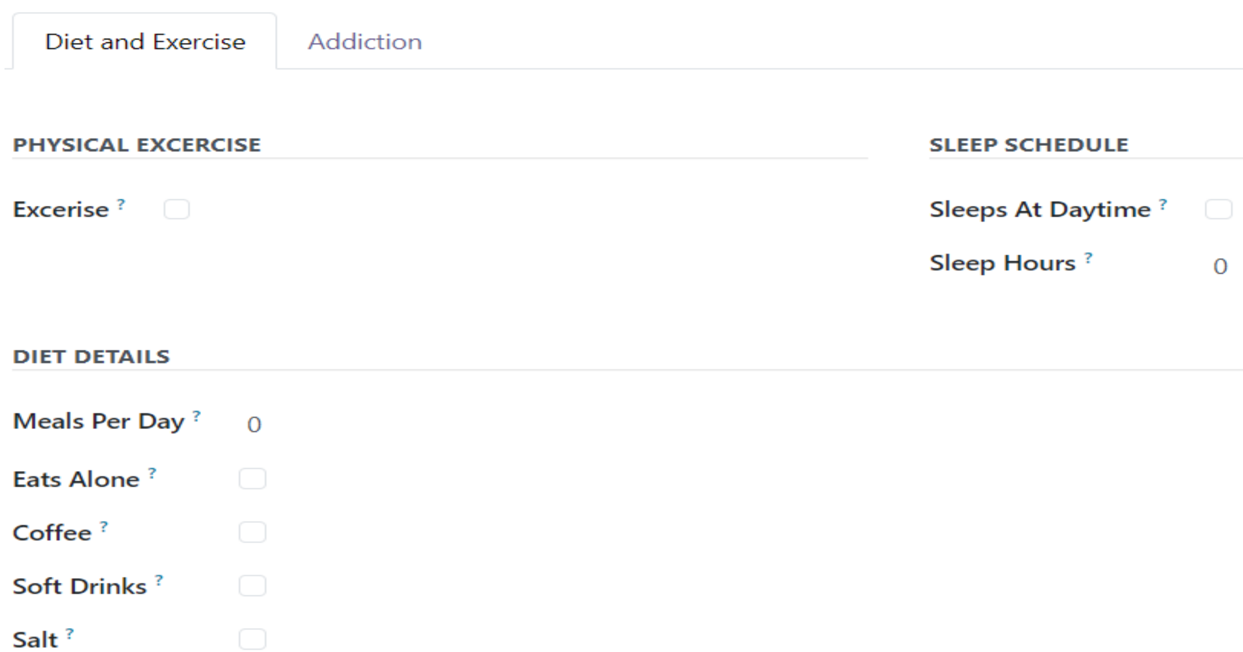


Figure 11: Diet and Exercise View

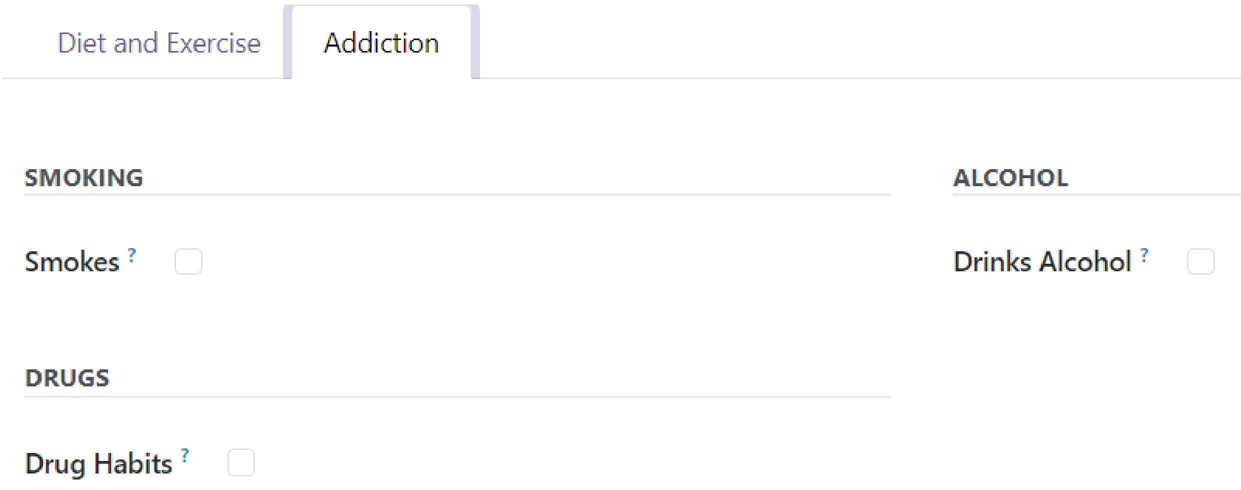


Figure 12: Addiction Information

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

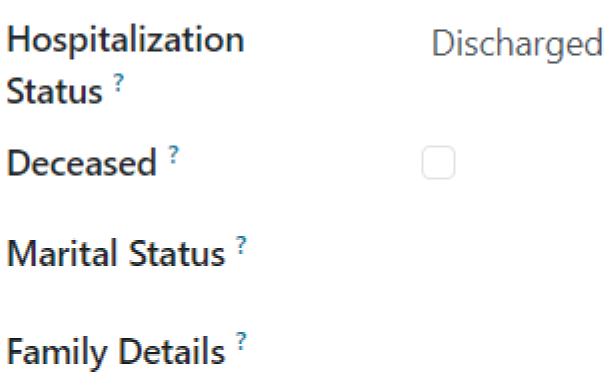


Figure 13: Status and Family View

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

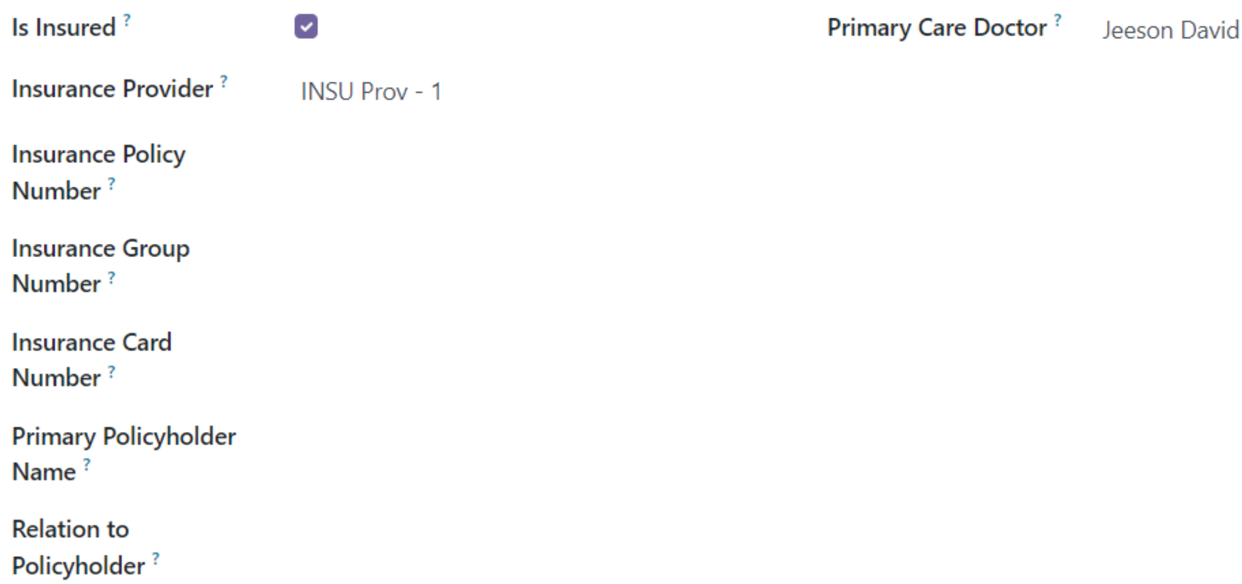


Figure 14: Insurance & Doctors Page

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

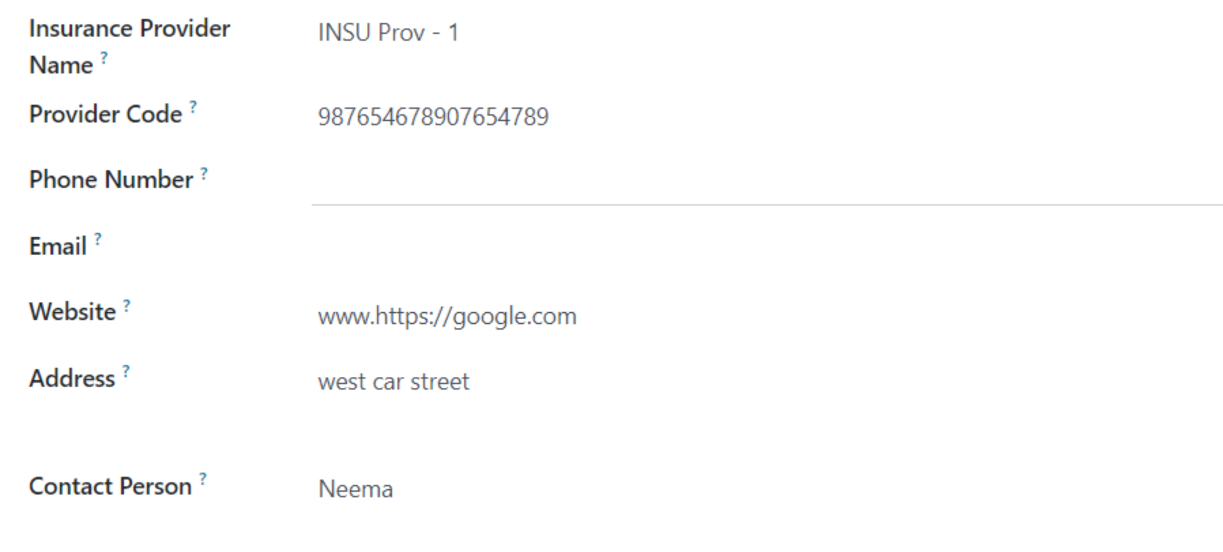


Figure 15: Insurance Provider Tab

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

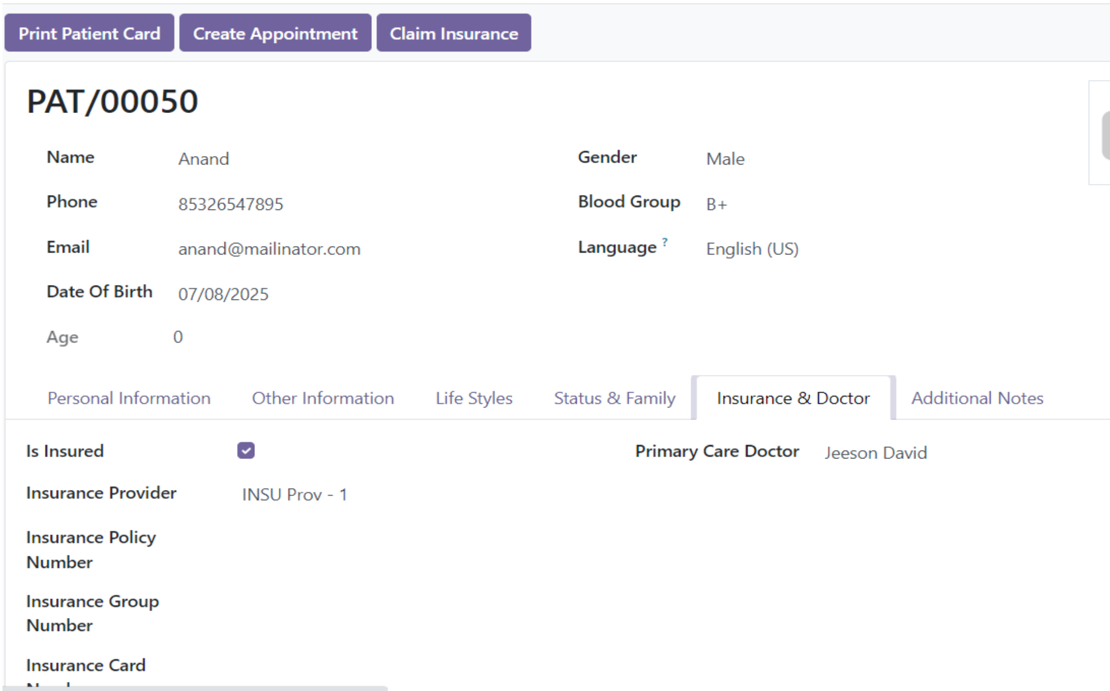


Figure 16: Is Insured Enabled check box

- 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.

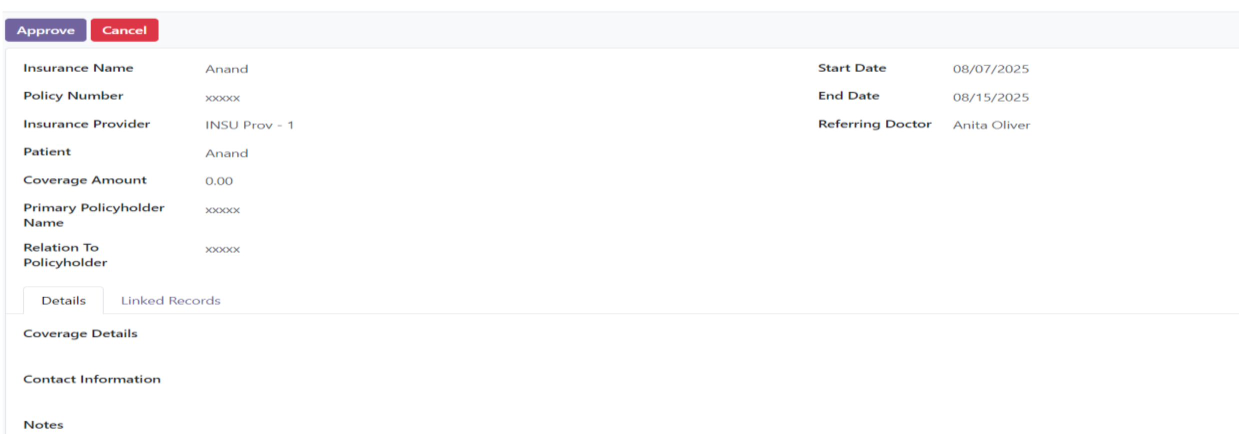


Figure 17: Insurance Request

- 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.

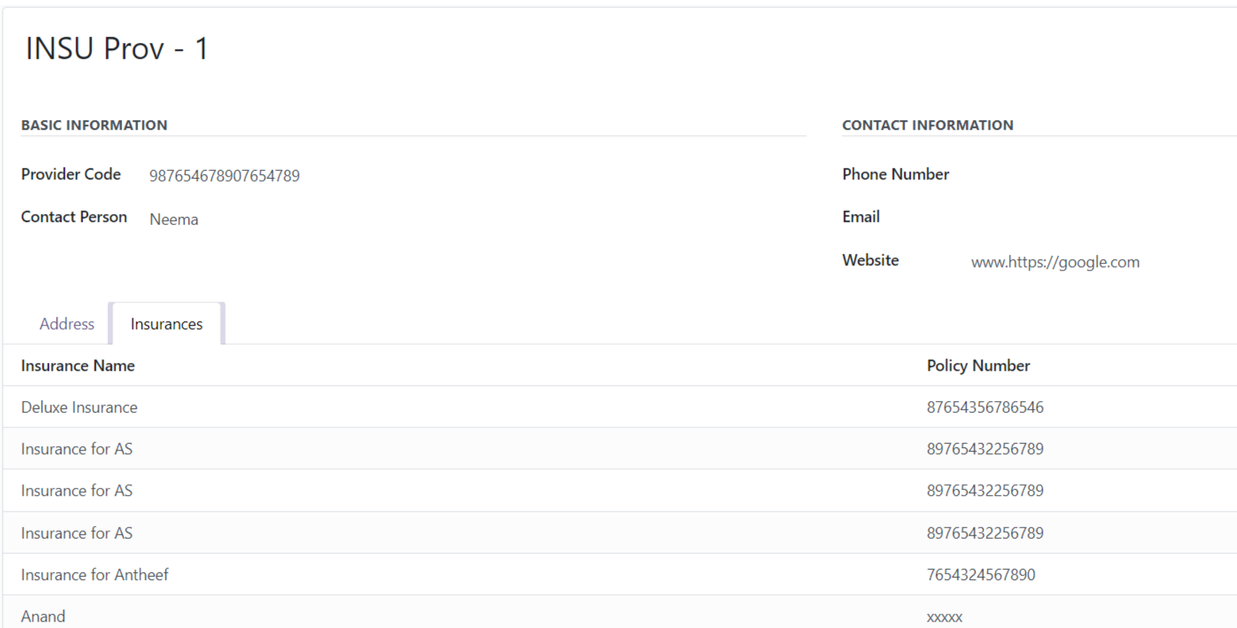


Figure 18: Insurance Provider

- **Patient Medical Record**

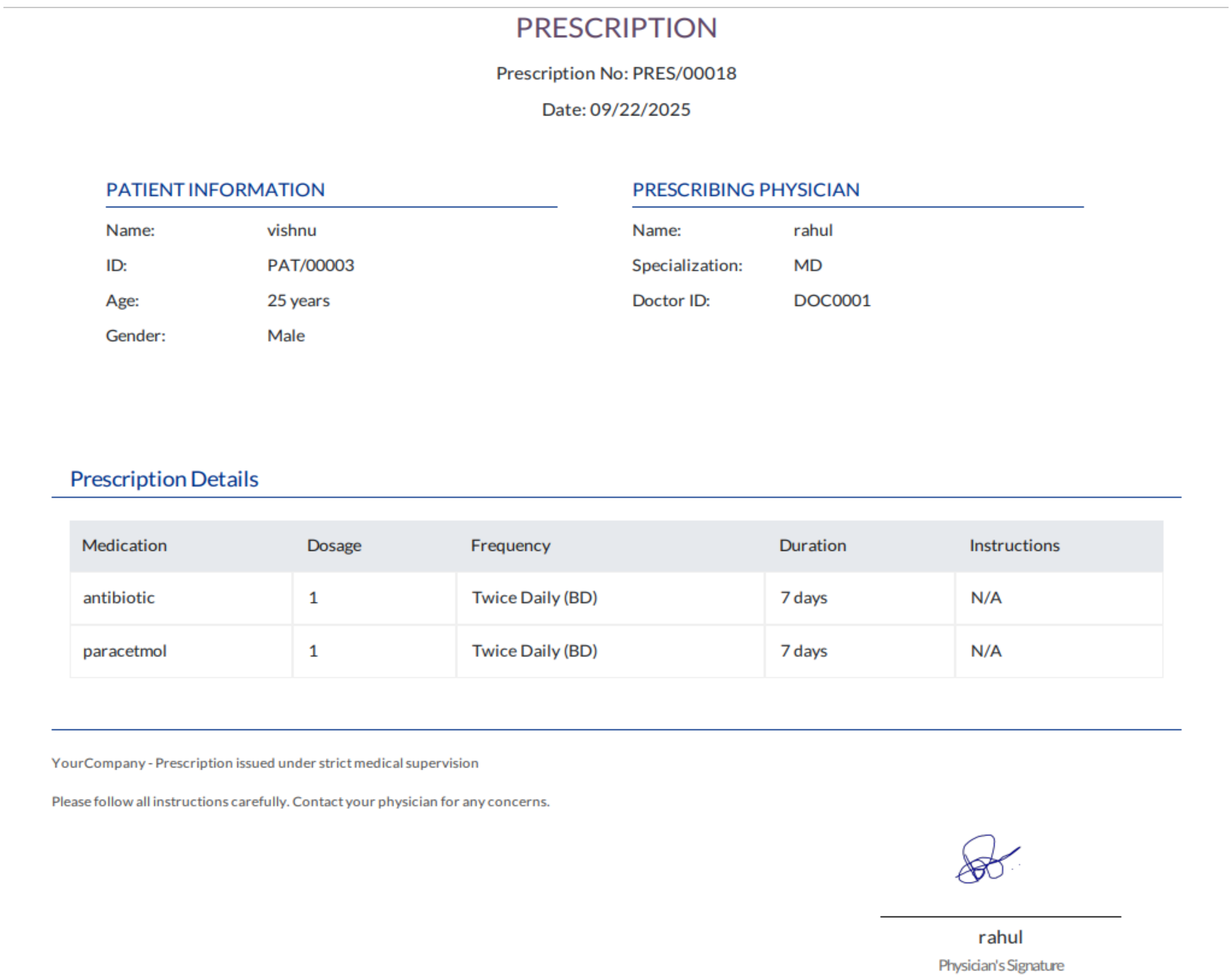
  While creating patient appointments, a new medical record is automatically generated, including the patient's name, department, assigned doctor, and linked appointment details. Alternatively, medical records can be manually created from the **Patient Management tab → Patient Medical** Record.

  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

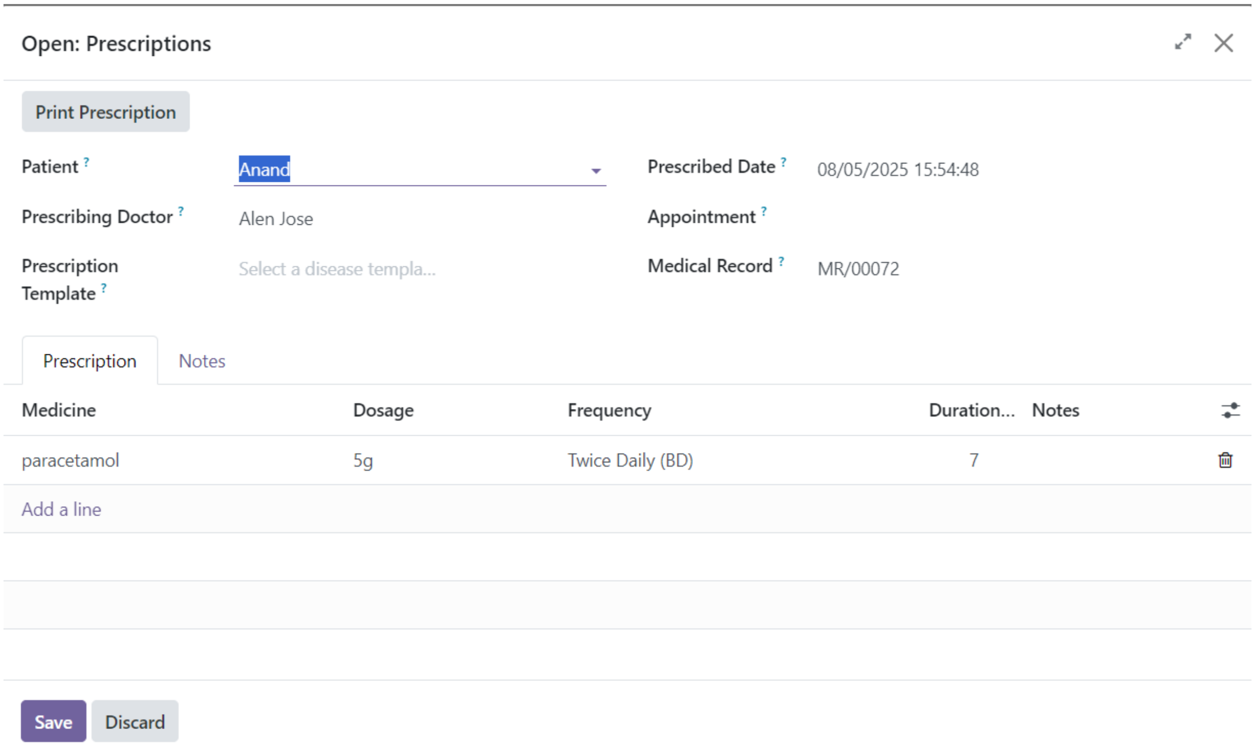


Figure 20: Add Prescription

- **Progress Notes**

  This section contains the track history of the medical condition.

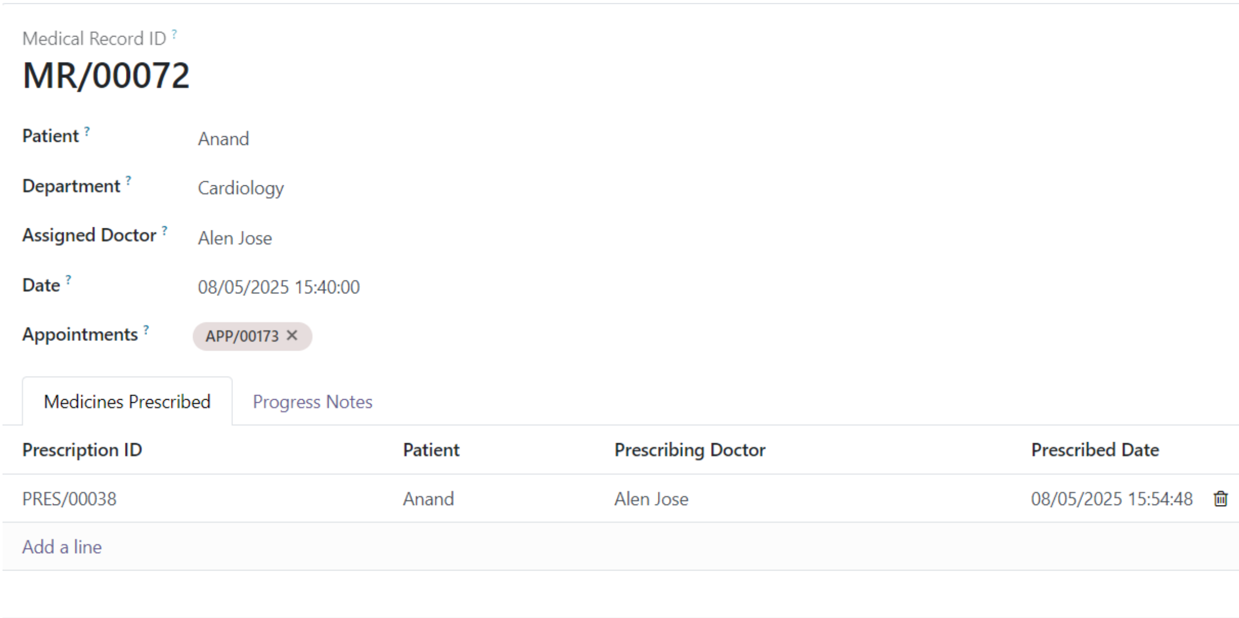


Figure 21: Medical Record

- **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.

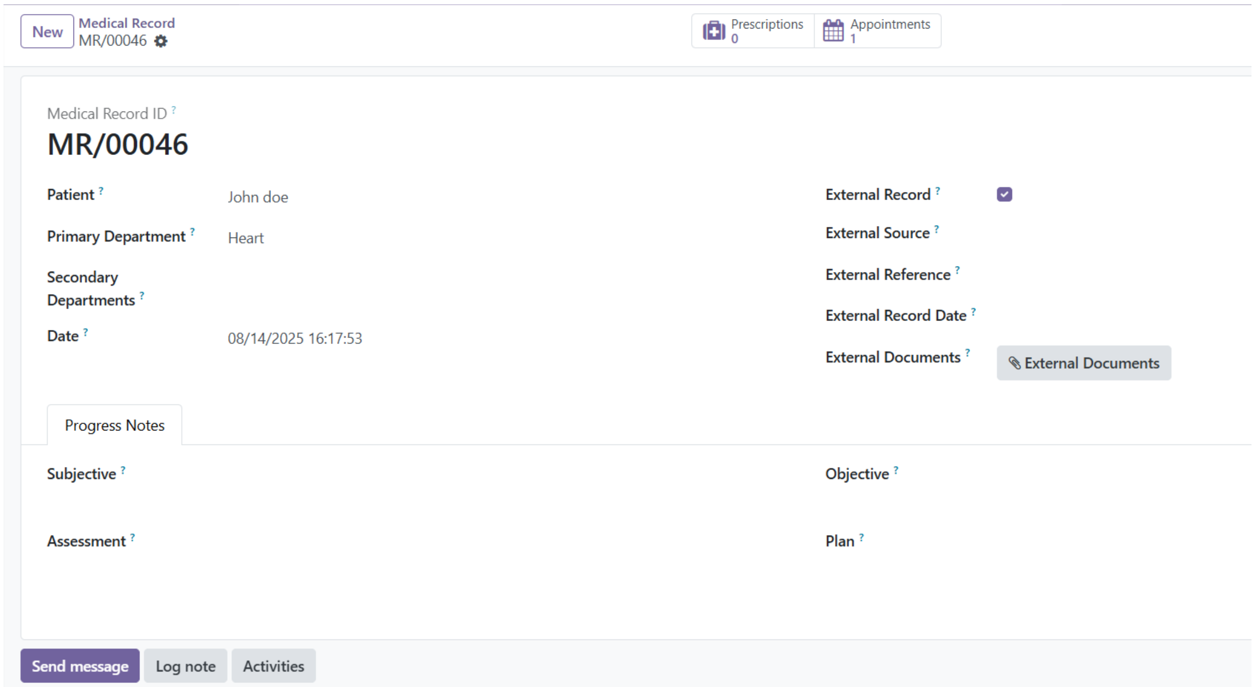


Figure 22: Medical Record

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.**

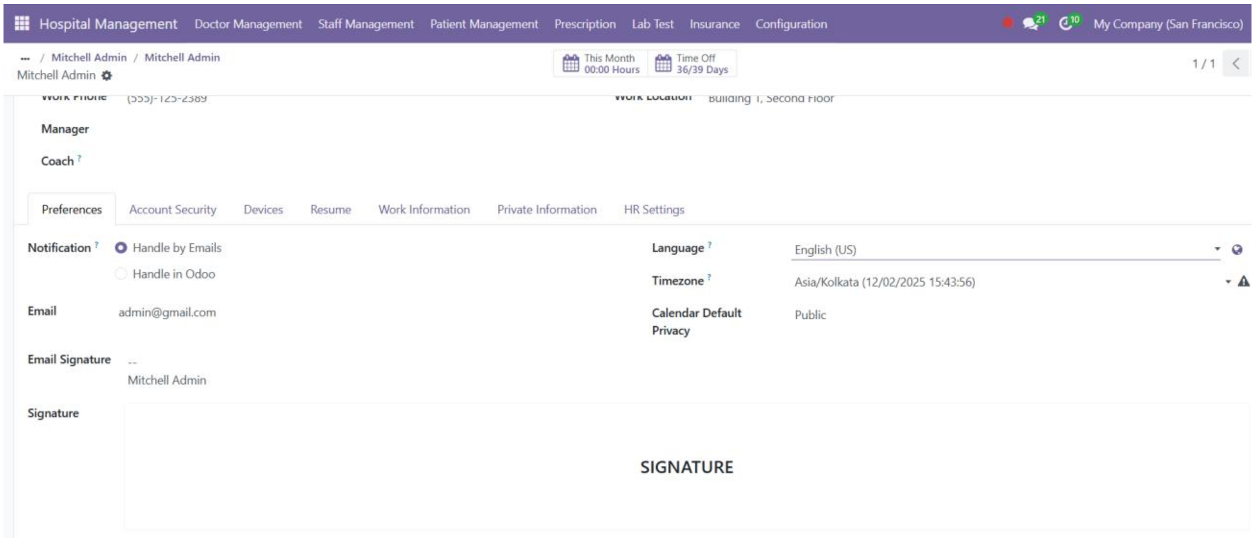


Figure 23: Digital Signatures View

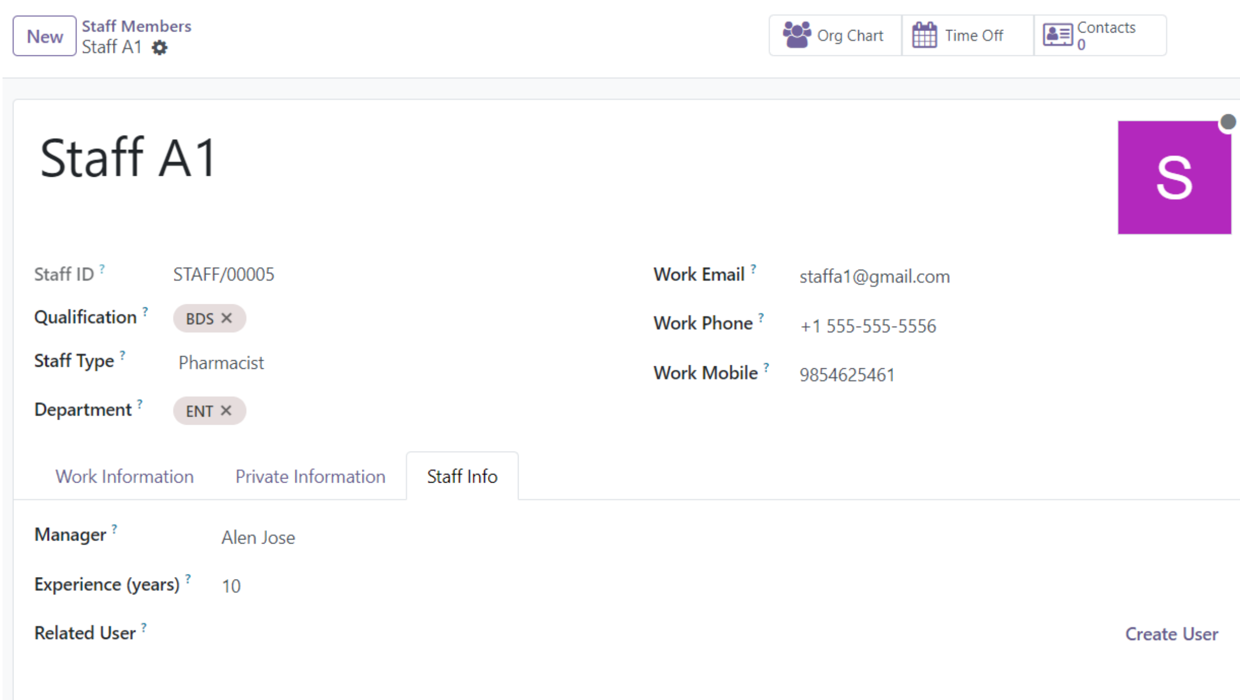


Figure 24: Staff Member View

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

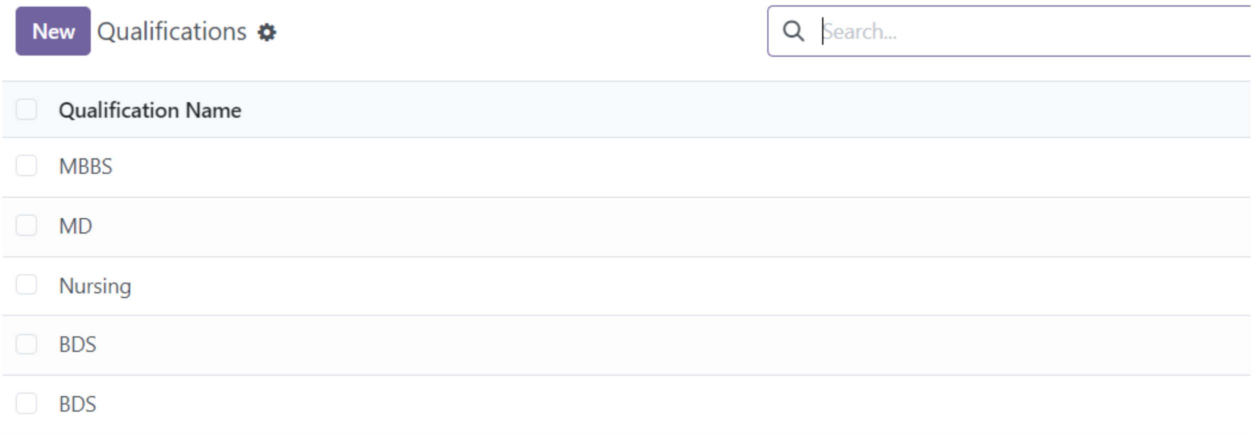


Figure 25: Qualifications View

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

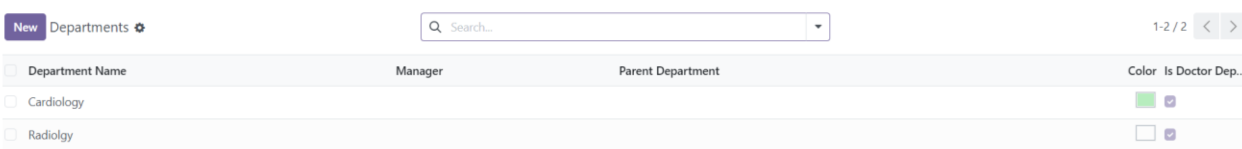


Figure 26: Departments View

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

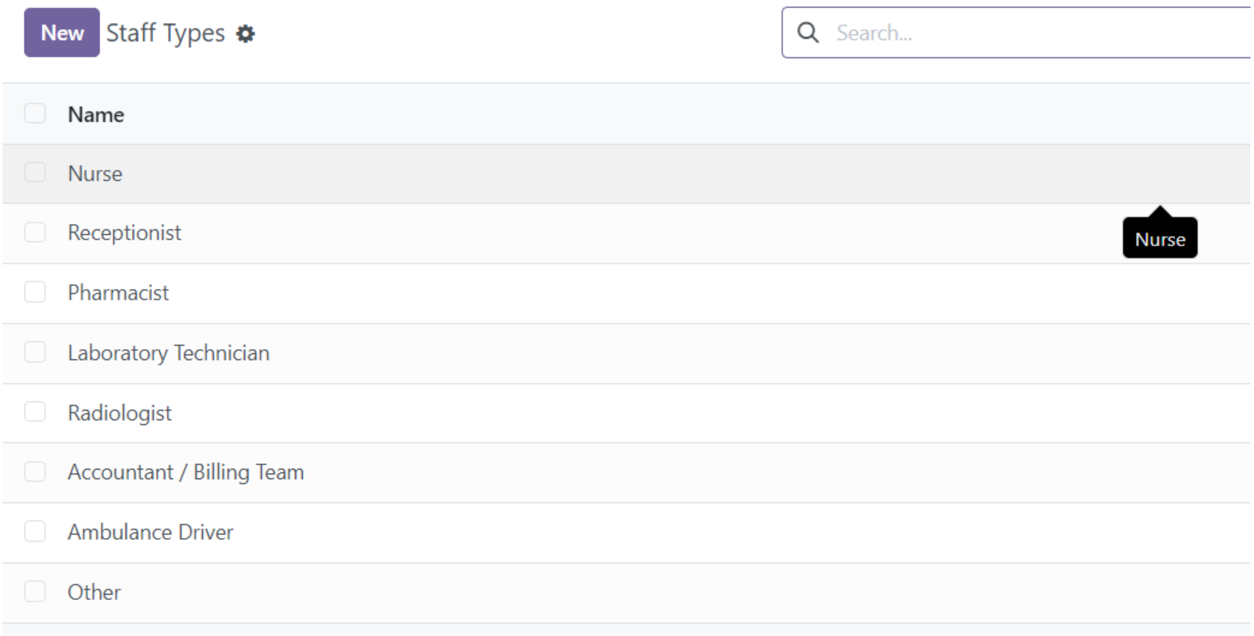


Figure 27: Staff Type

- 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.

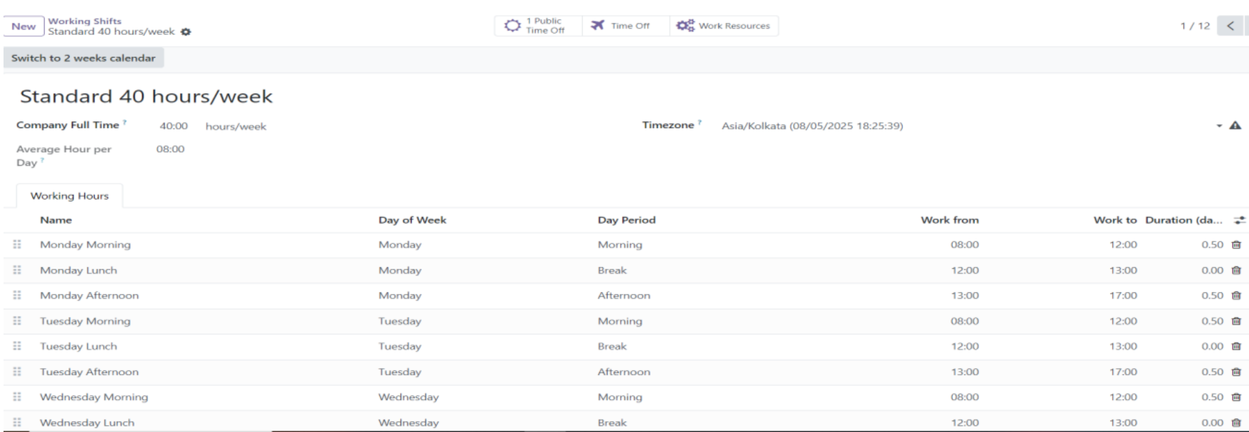


Figure 28: Working Shifts View

- 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.

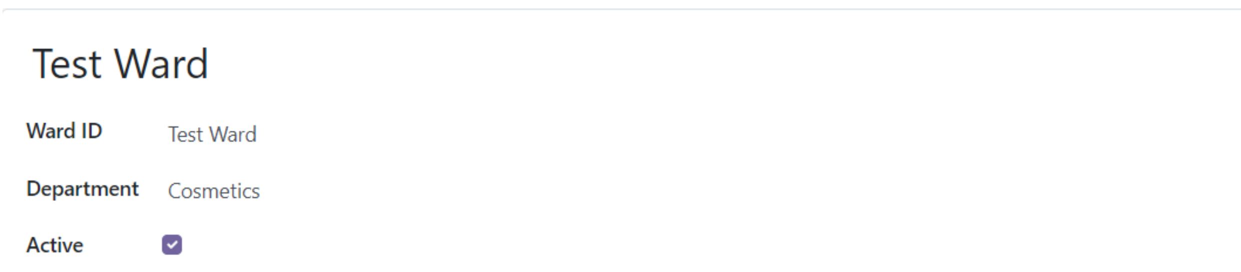


Figure 29: Assigned Ward

- **Assigned Patients**

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

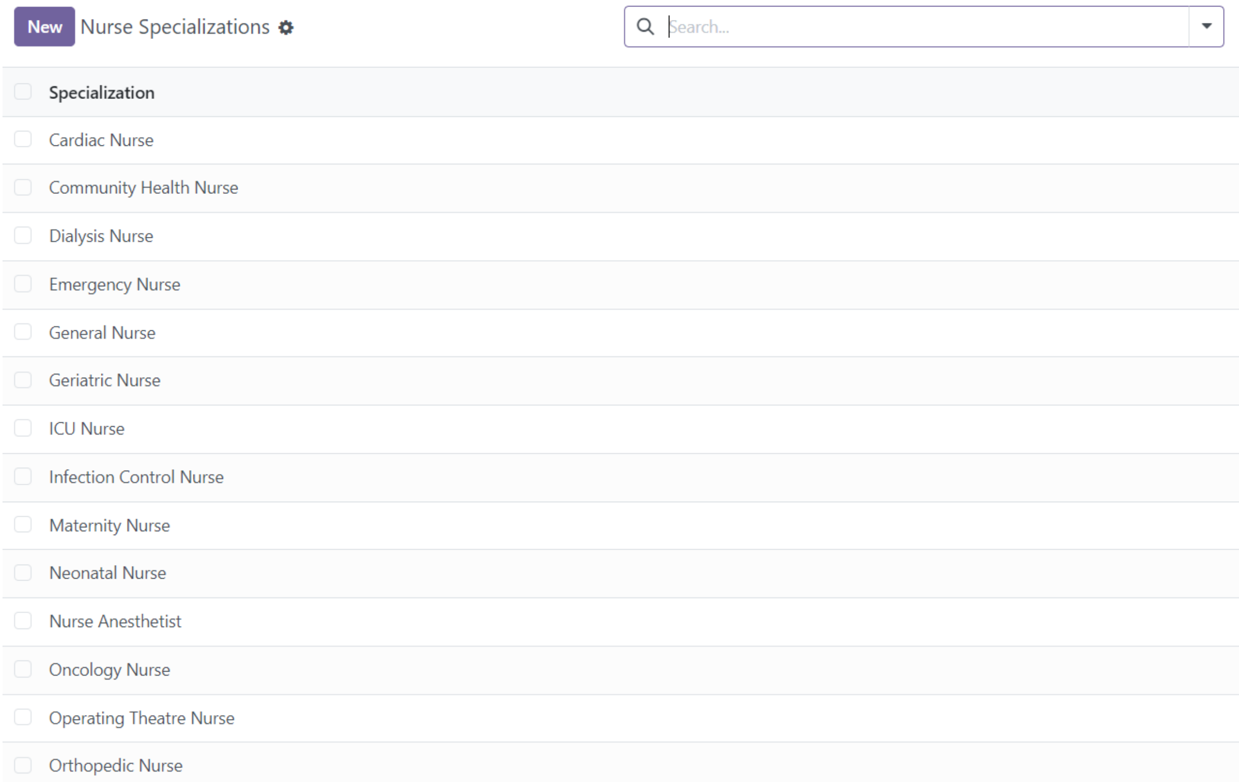


Figure 30: Nurse Specializations

- 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.

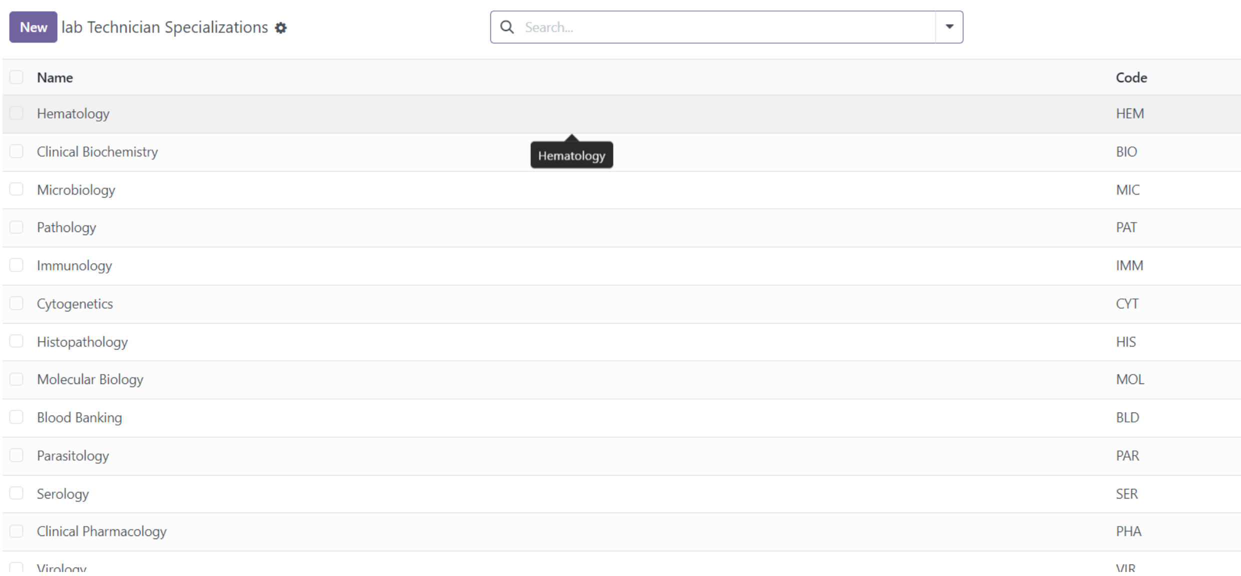


Figure 31: Lab Technician Specializations

- 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.**

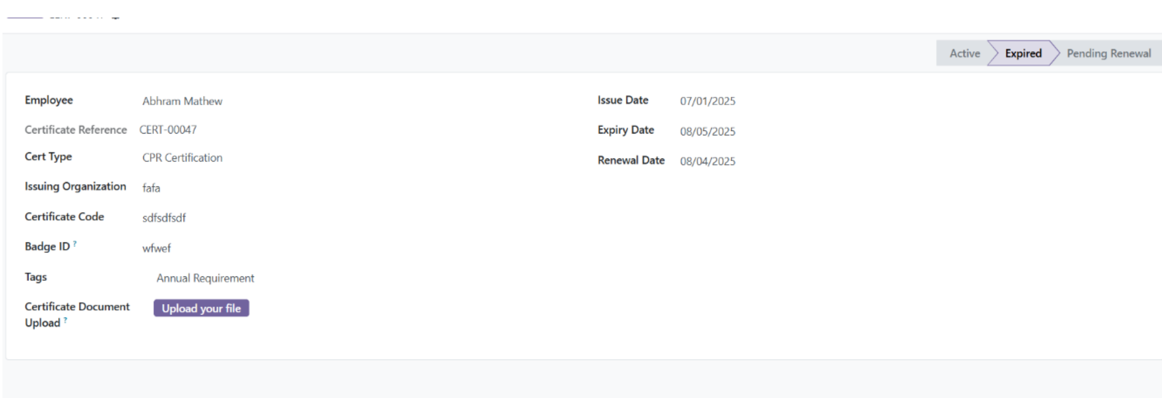


Figure 32: Employee Certification

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.

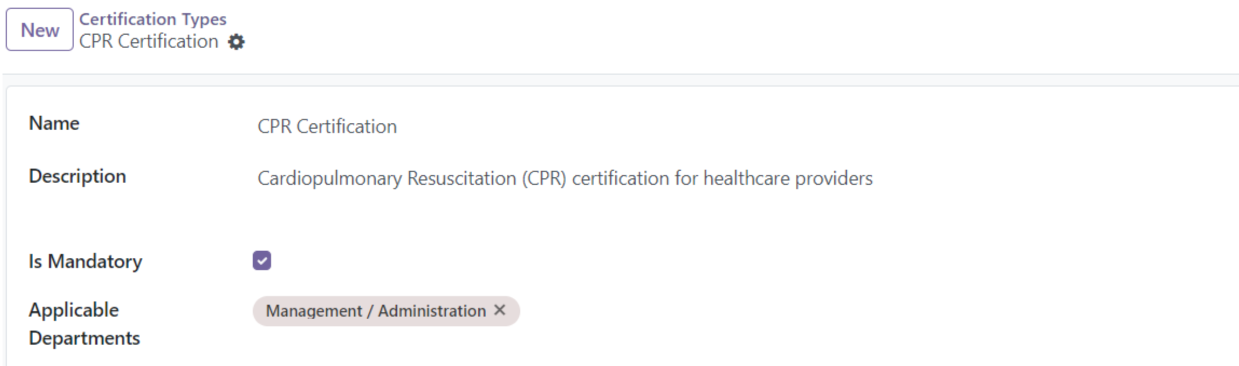


Figure 33: Certification Types

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.

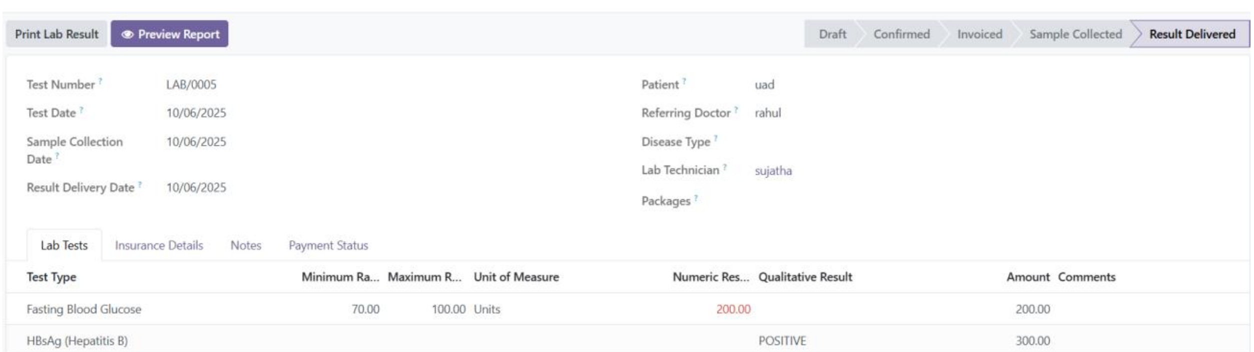


Figure 34: Laboratory Test Record

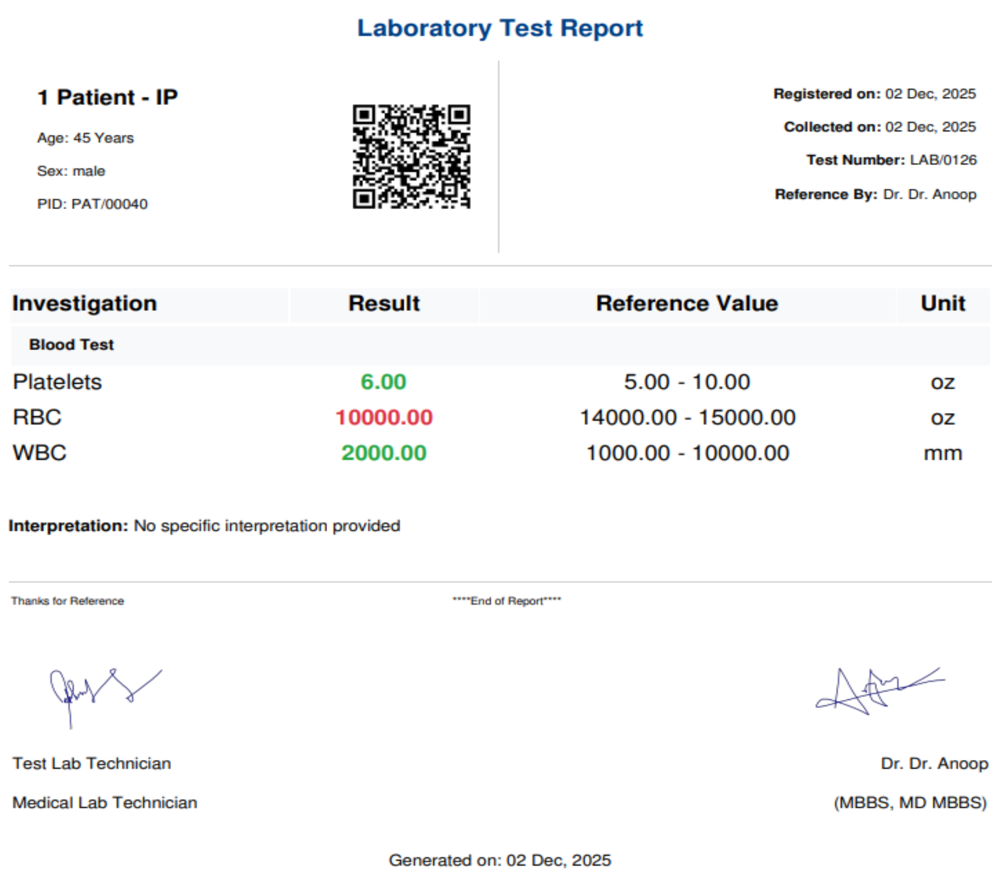
After Result Delivered, the test result can be viewed using the **Preview Result** button, and it can be downloaded using the **Print Lab Result** button and entered while the test result is in the ***Sample Collected*** state. The result document also contains a QR code, which can be scanned to download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

****End of Report****

Test Lab Technician

Medical Lab Technician

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.

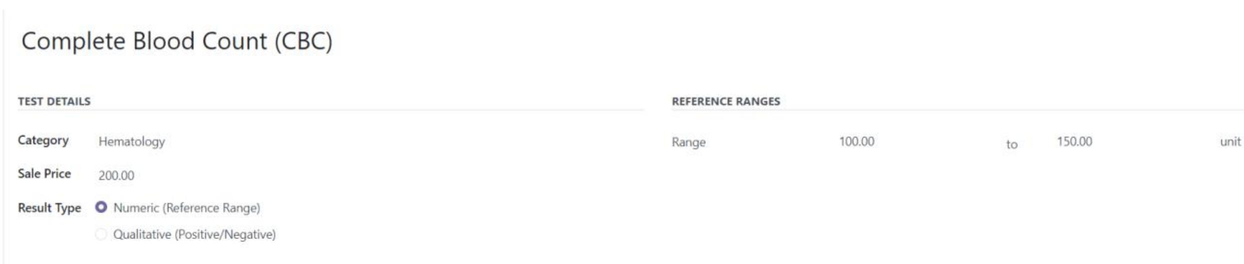


Figure 36: Lab Test Type

- **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.

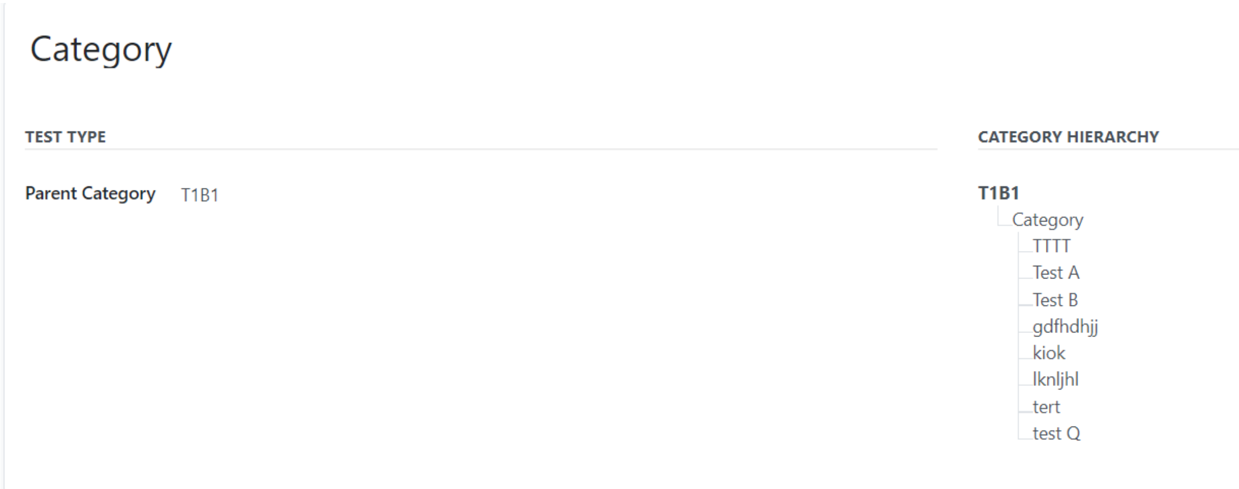


Figure 37: Lab Test Category

- **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.

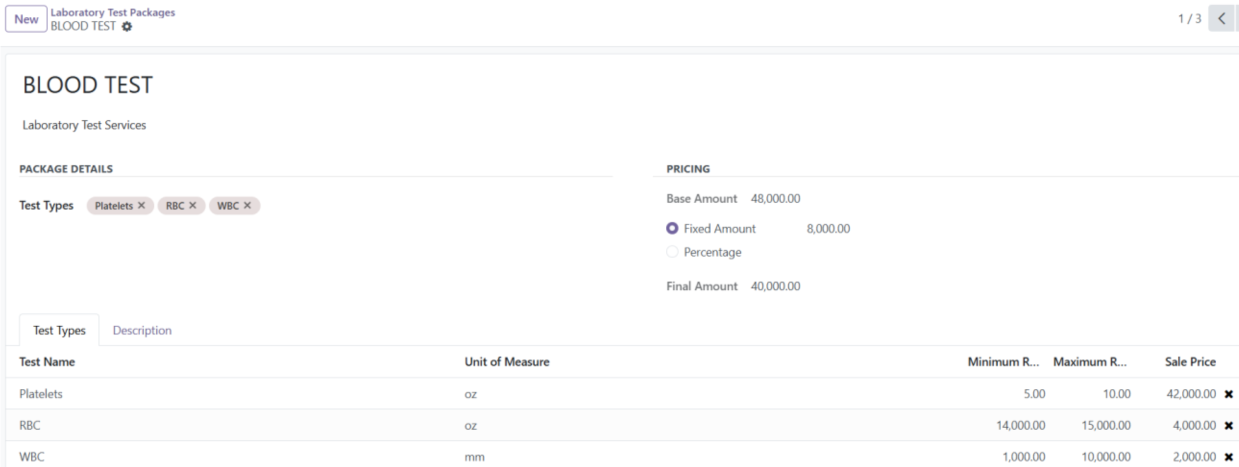


Figure 38: Lab Test Package

- **Invoicing Lab Test Records**

Creating an Invoice

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

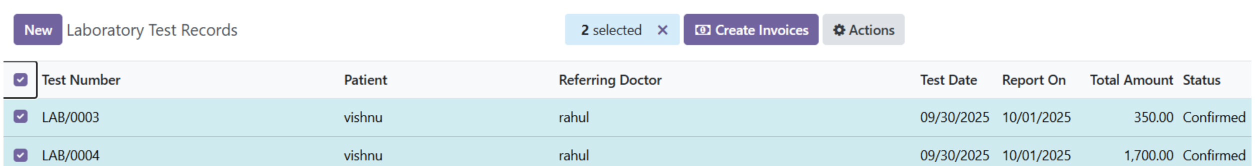


Figure 39: Lab Test Invoice create

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

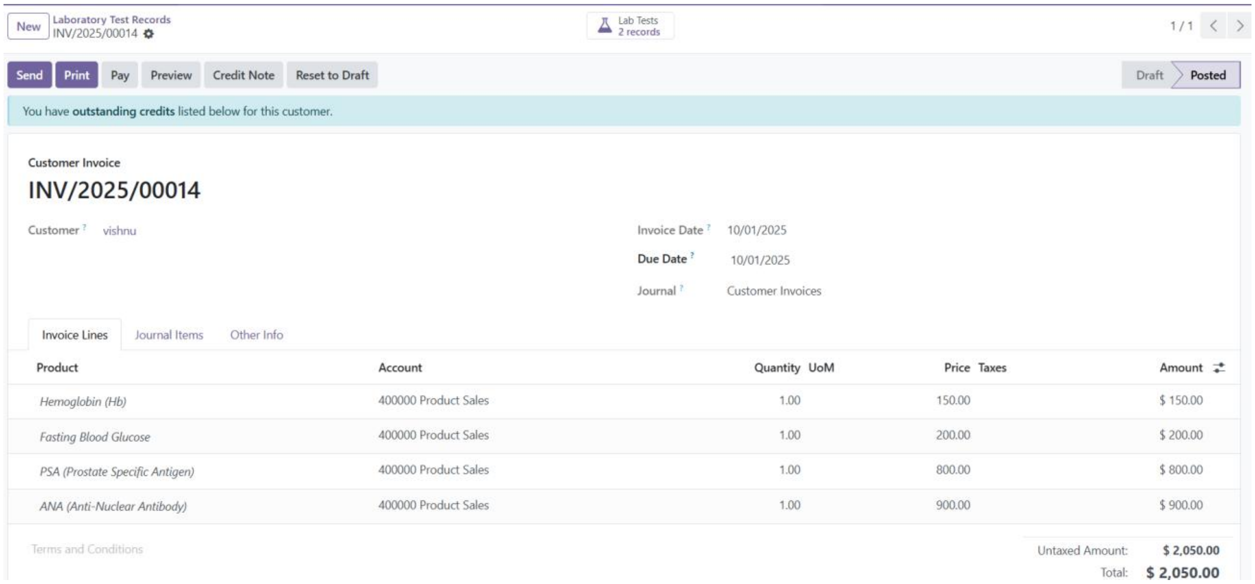


Figure 40: Invoice view

4. Review and post the invoice

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

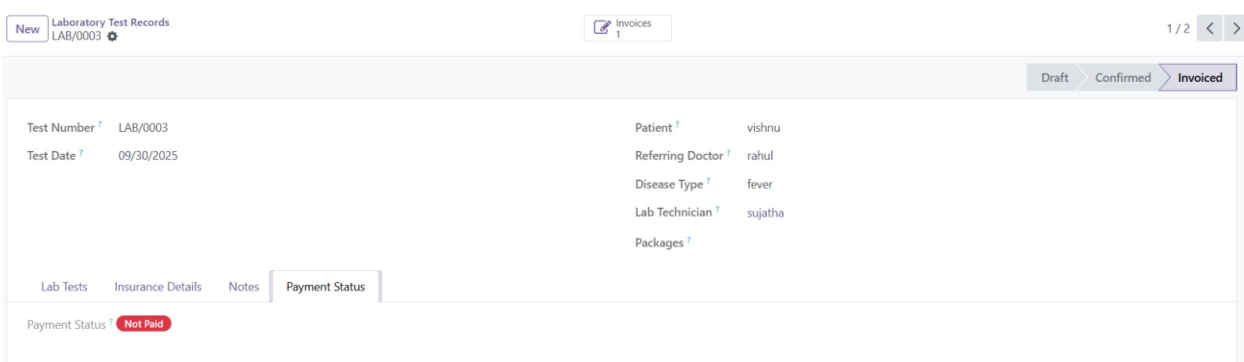


Figure 41: Payment Status

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.**

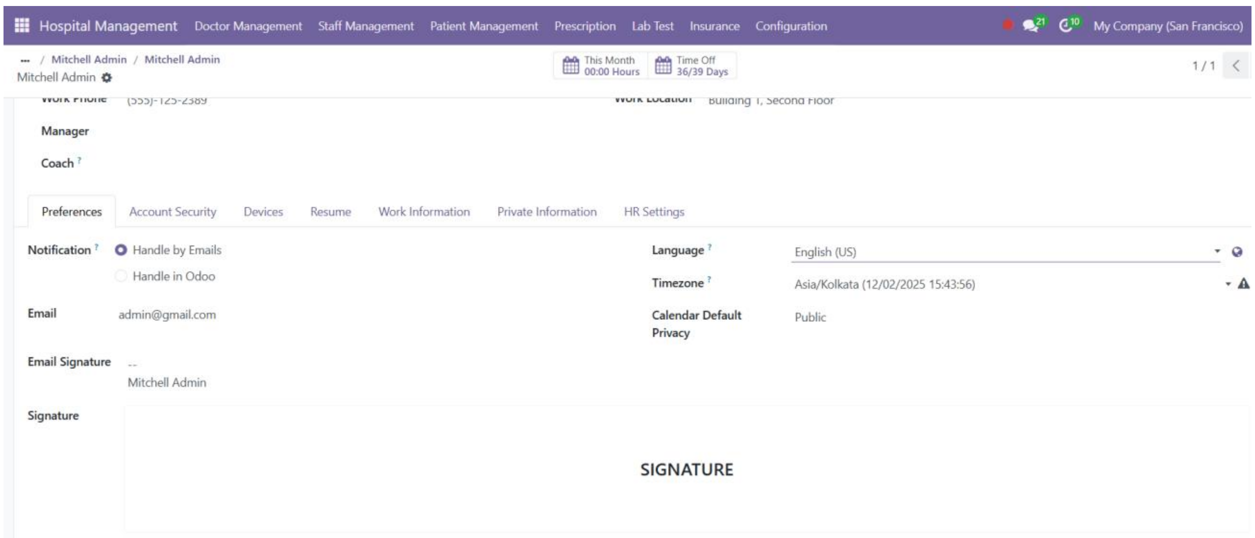


Figure 42: Digital Signatures View

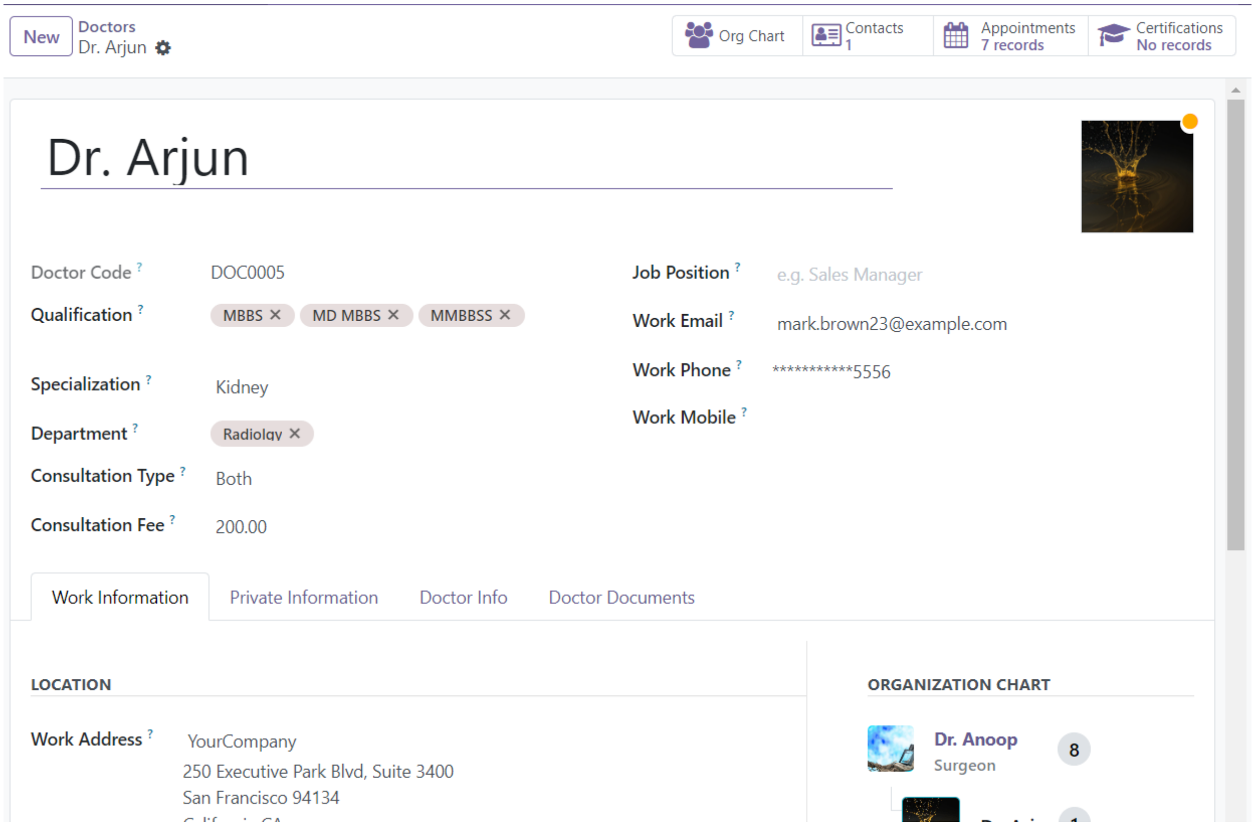


Figure 43: Doctor View

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**

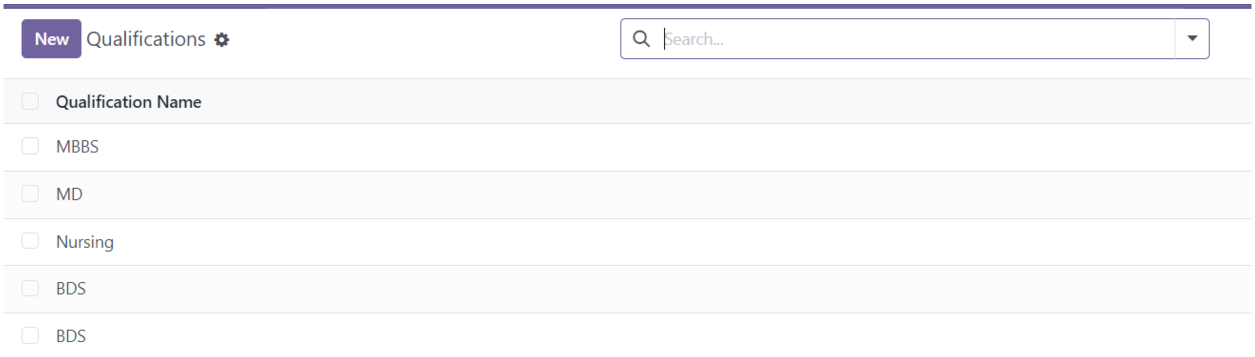


Figure 44: Doctor Qualification

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

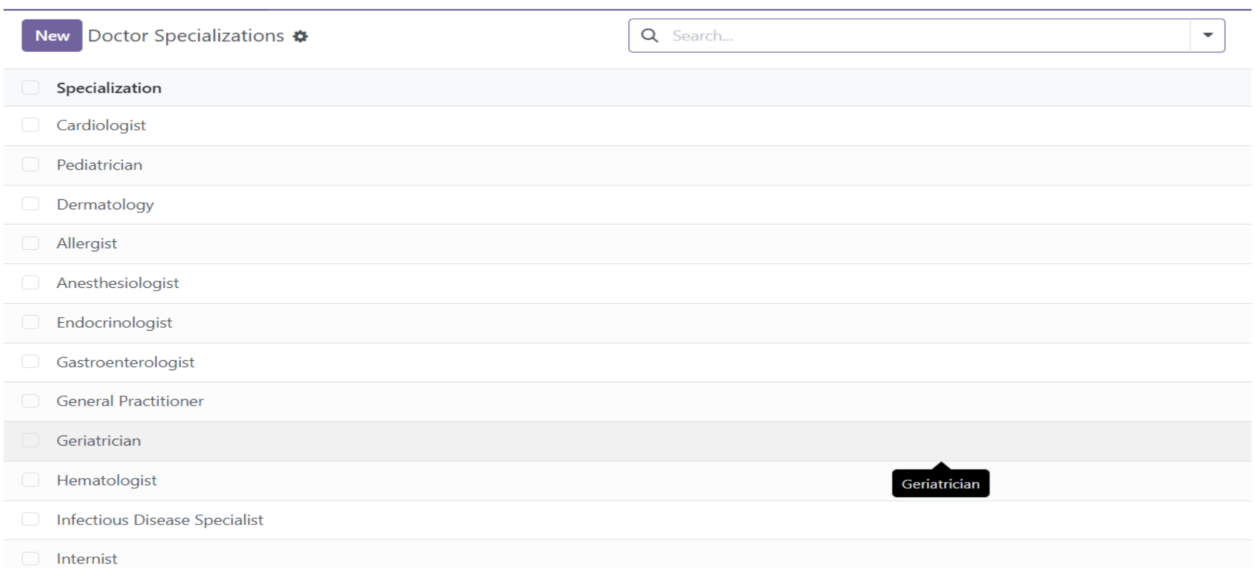


Figure 45: Doctor Specialization

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.

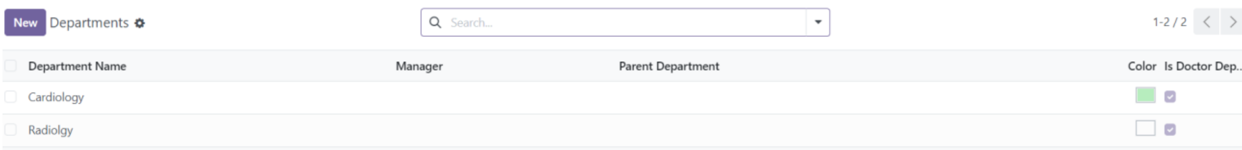


Figure 46: Department View

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.

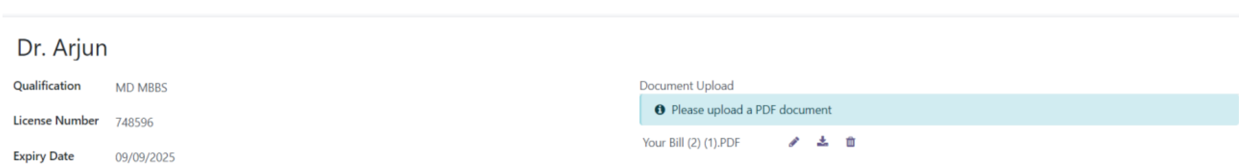


Figure 47: Create Doctor Document

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

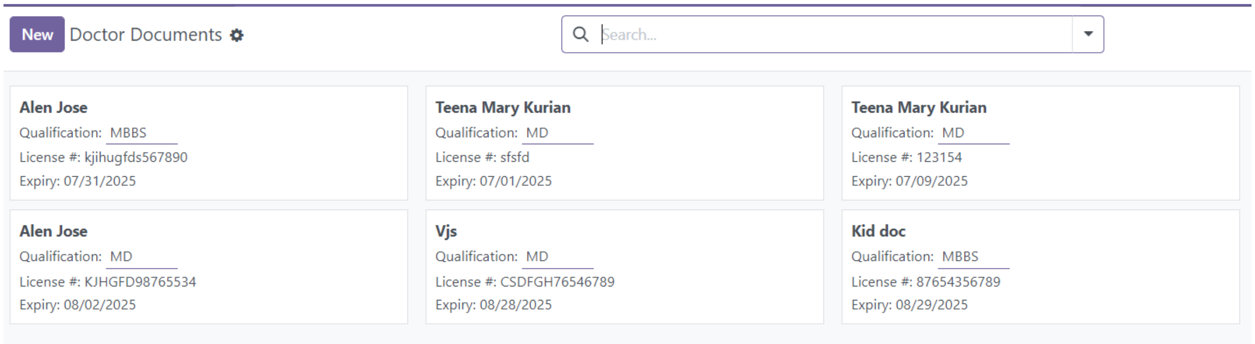


Figure 48: Doctor Documents

- **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.

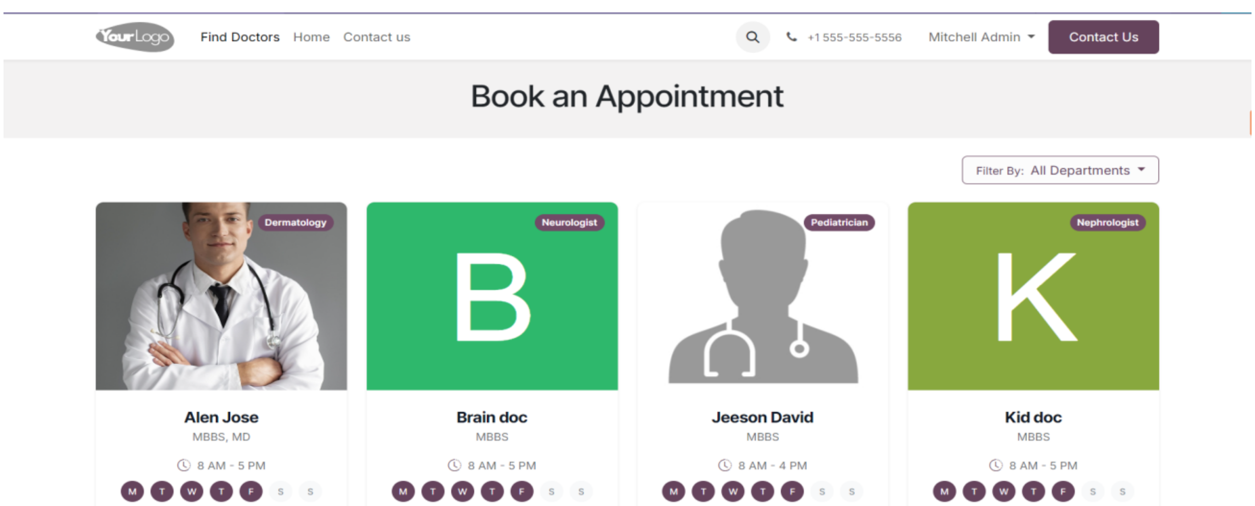


Figure 49: Book Appointments

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

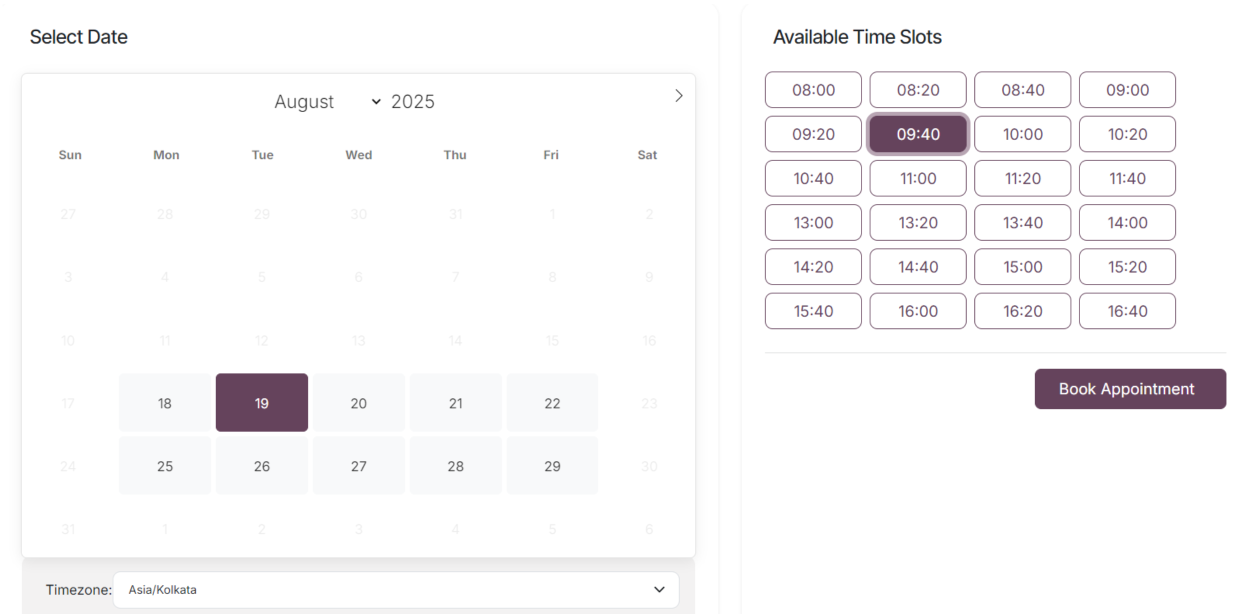


Figure 50: Appointment Time Slot

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

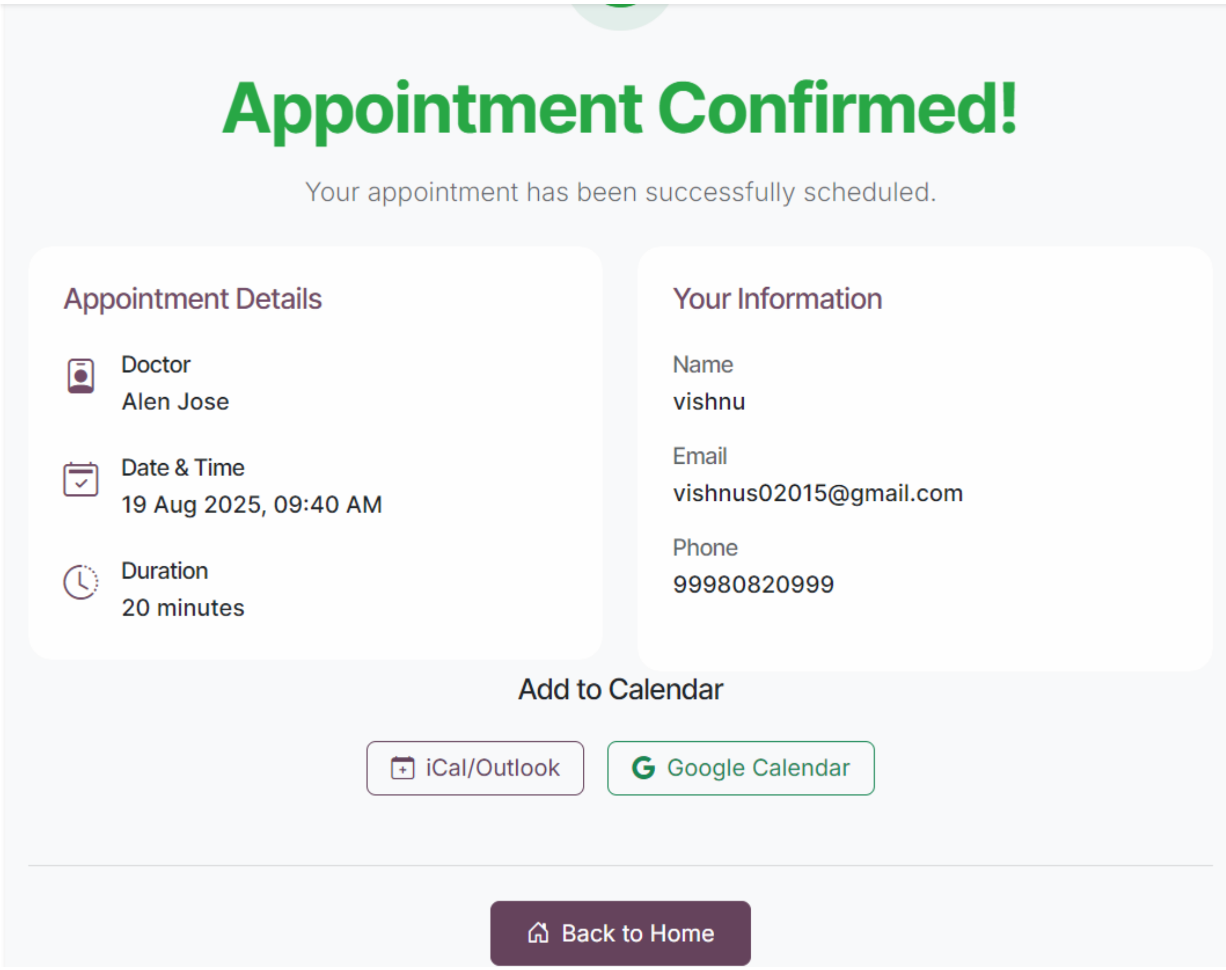


Figure 51: Appointment Confirmation

- 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.

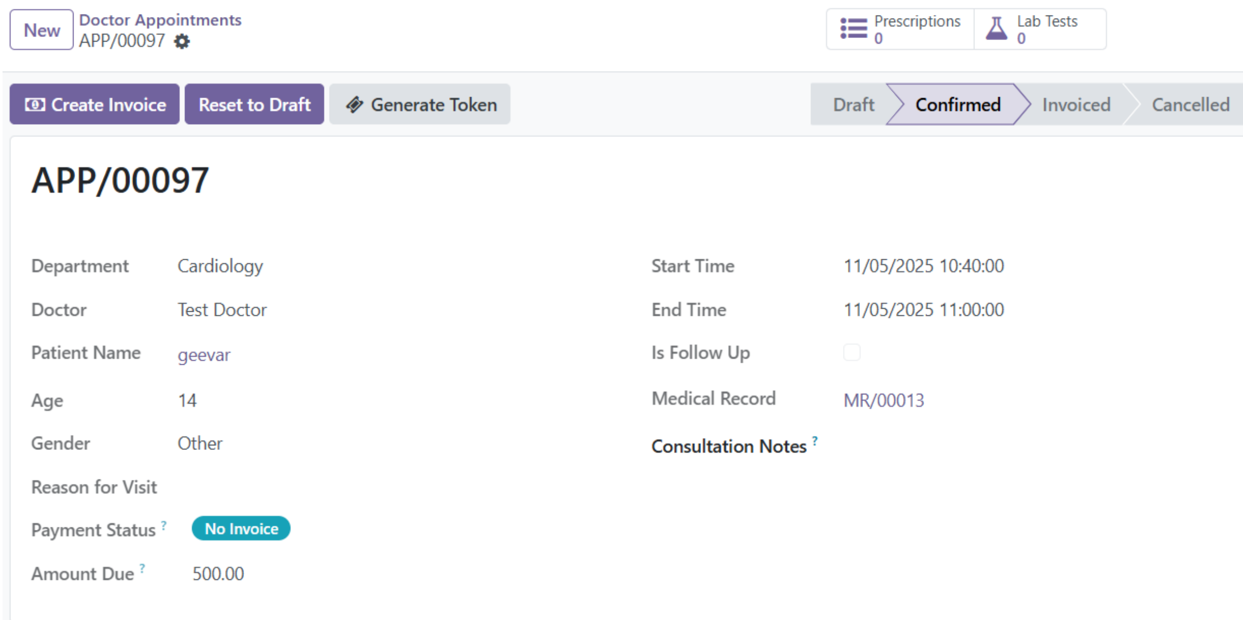


Figure 52: Doctor Appointment Confirmed

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.

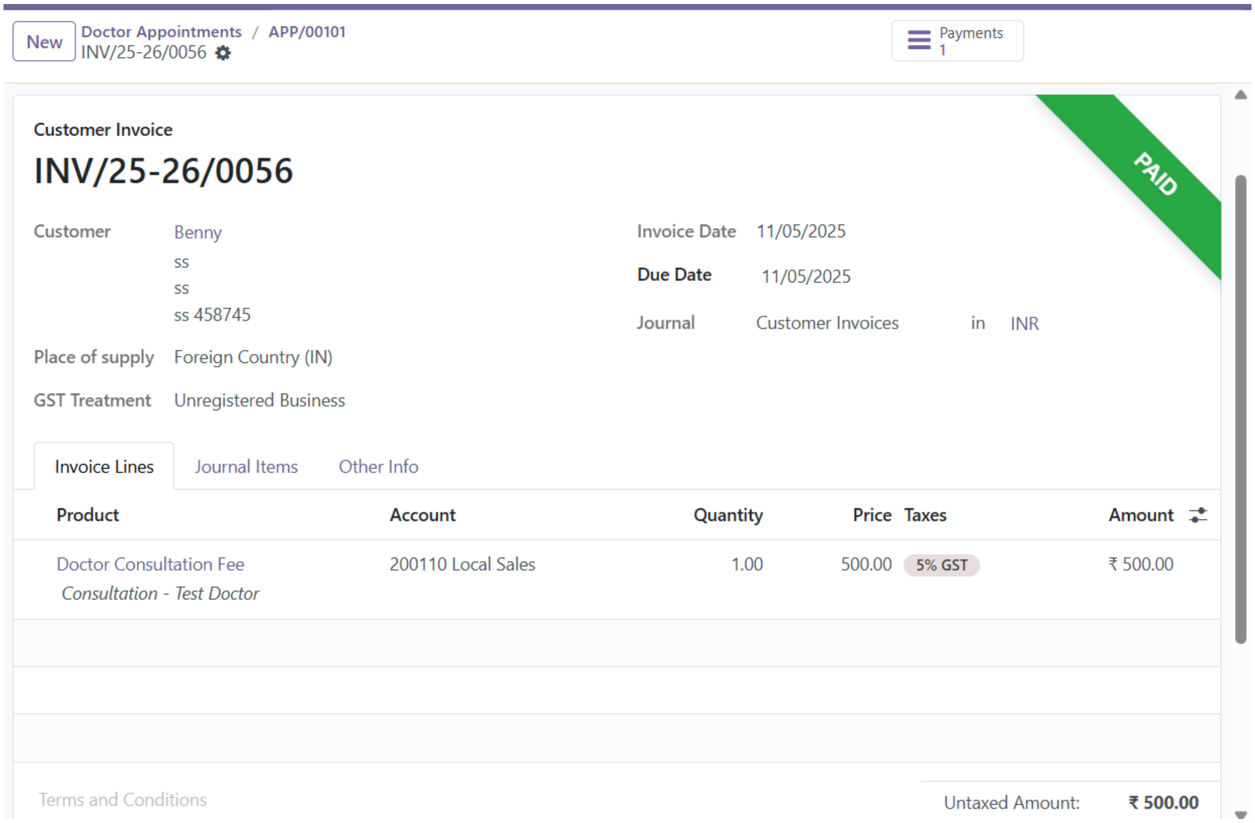


Figure 53: Doctor Consultation Fee Invoiced

- **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.

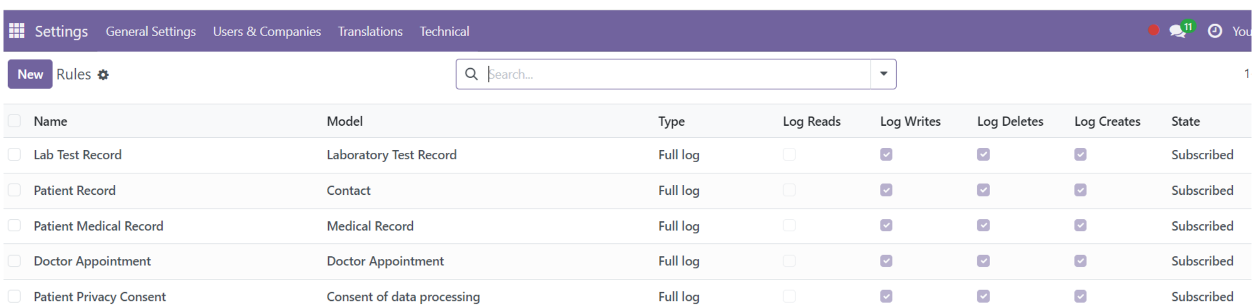
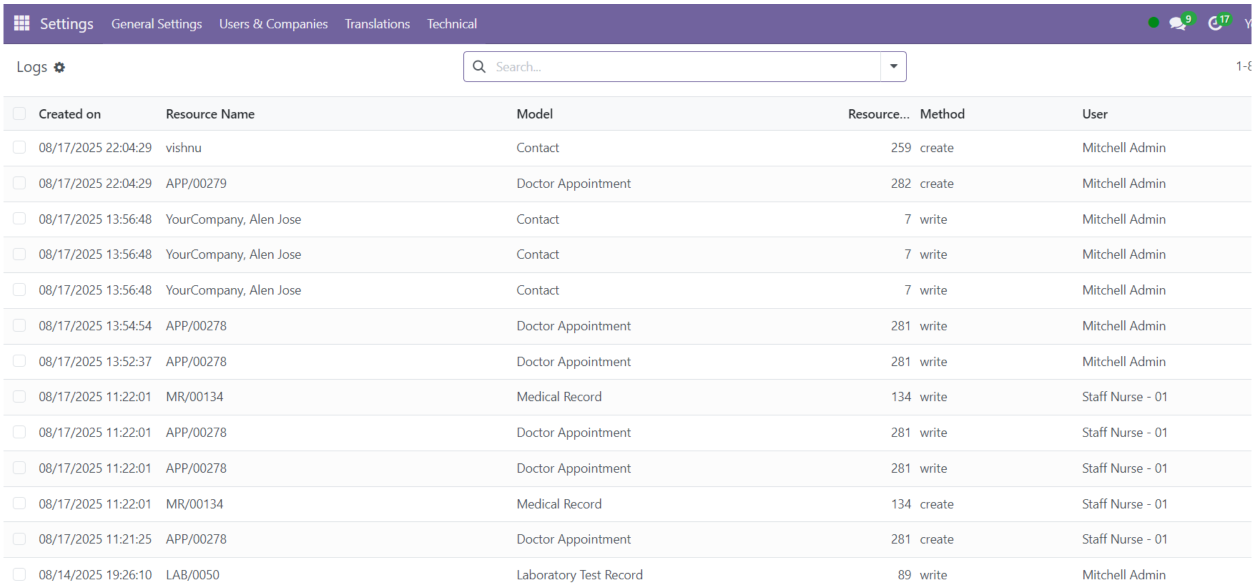


Figure 54: Audit Rules

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



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.

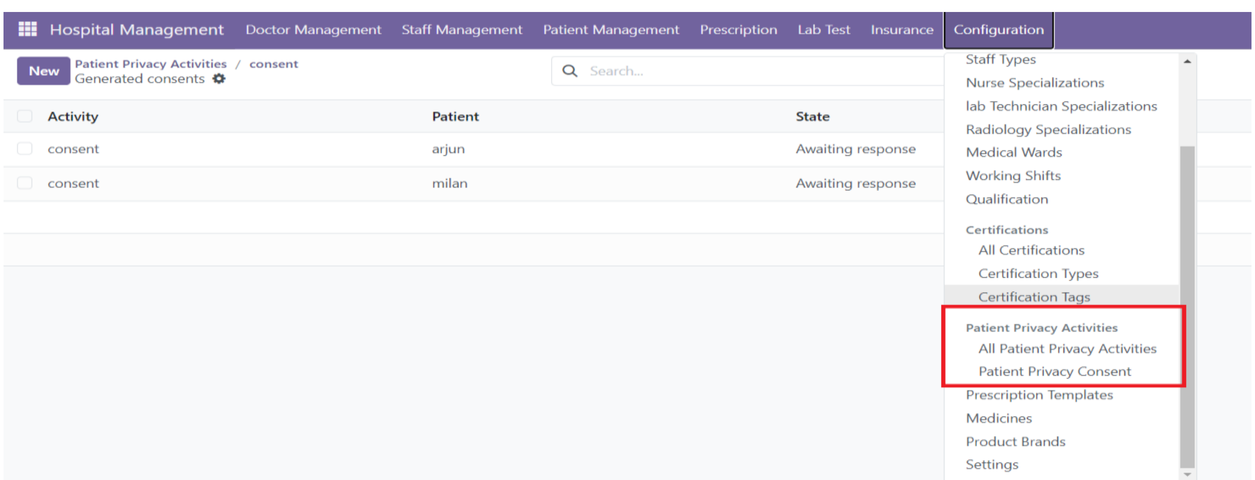


Figure 56: Privacy

Setting Up Activities

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

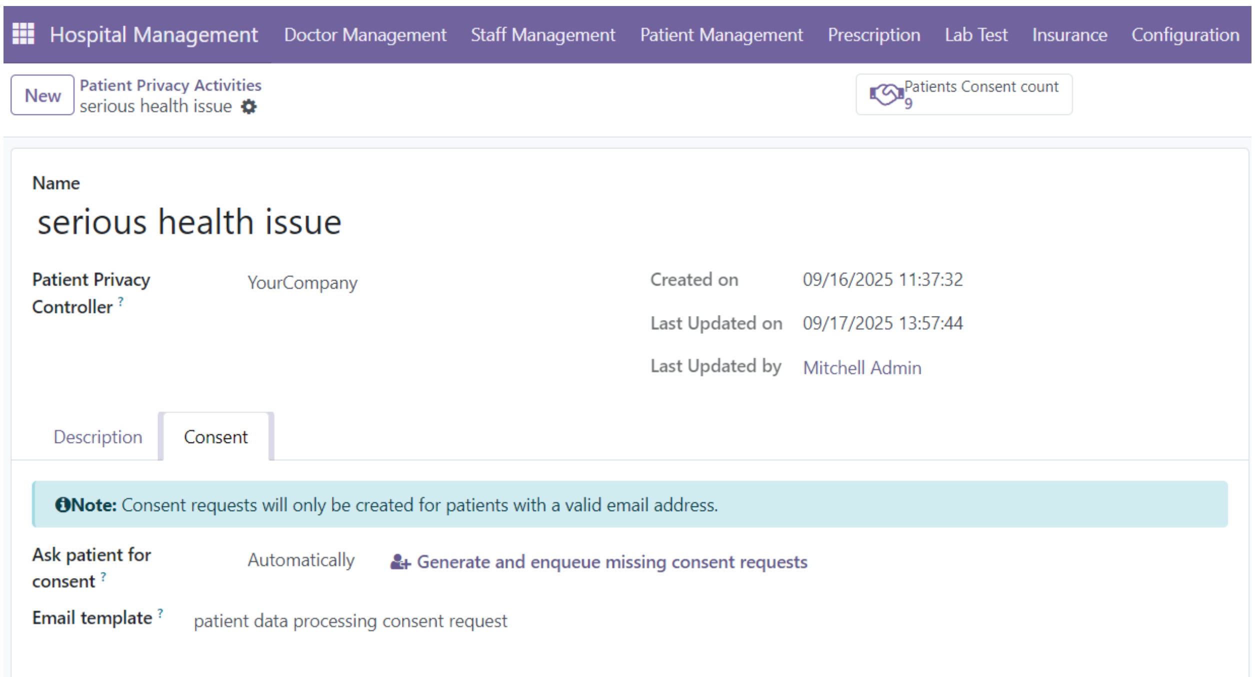


Figure 57: Privacy Activity

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**

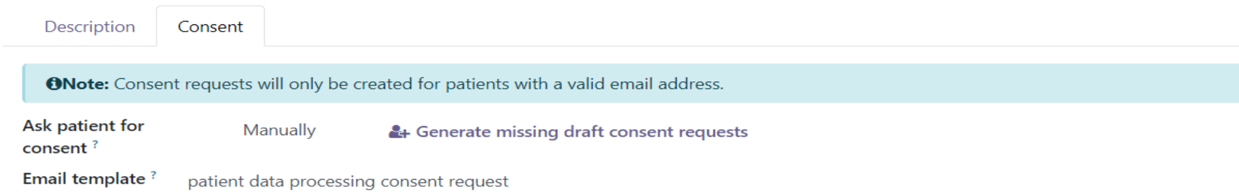


Figure 58: Privacy Manual Consent

2. **Automatically**

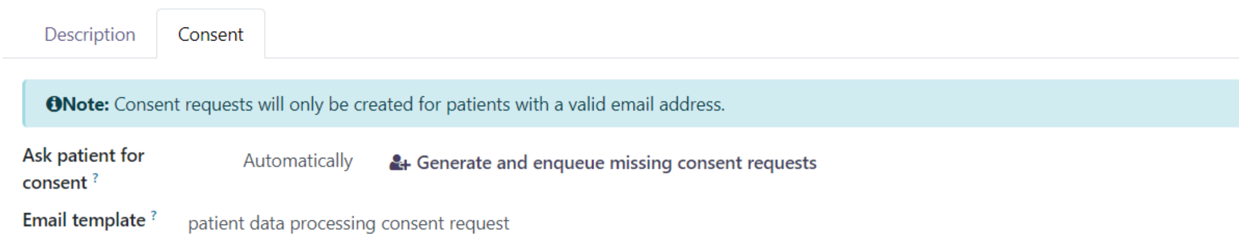


Figure 59: Privacy Automatic Consent

- **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.

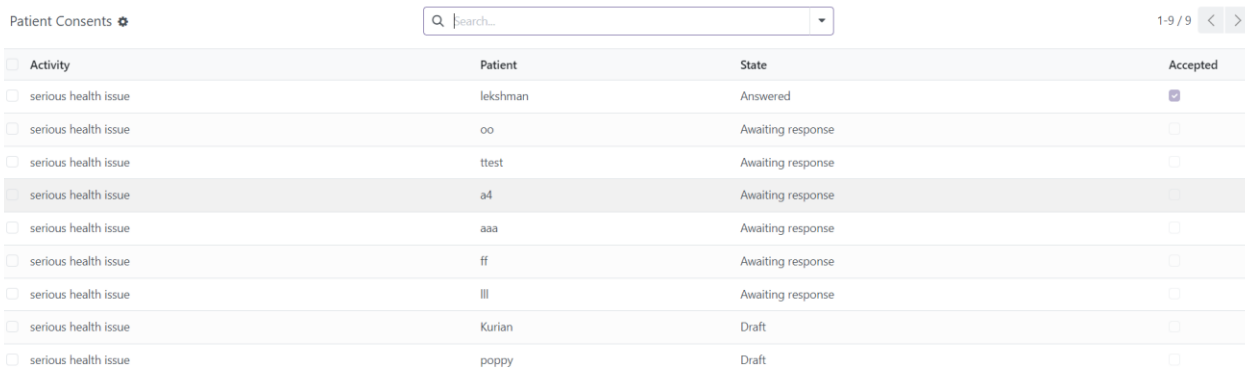


Figure 60: Patients Consents Raised

Figure 61: Privacy Consent Request

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

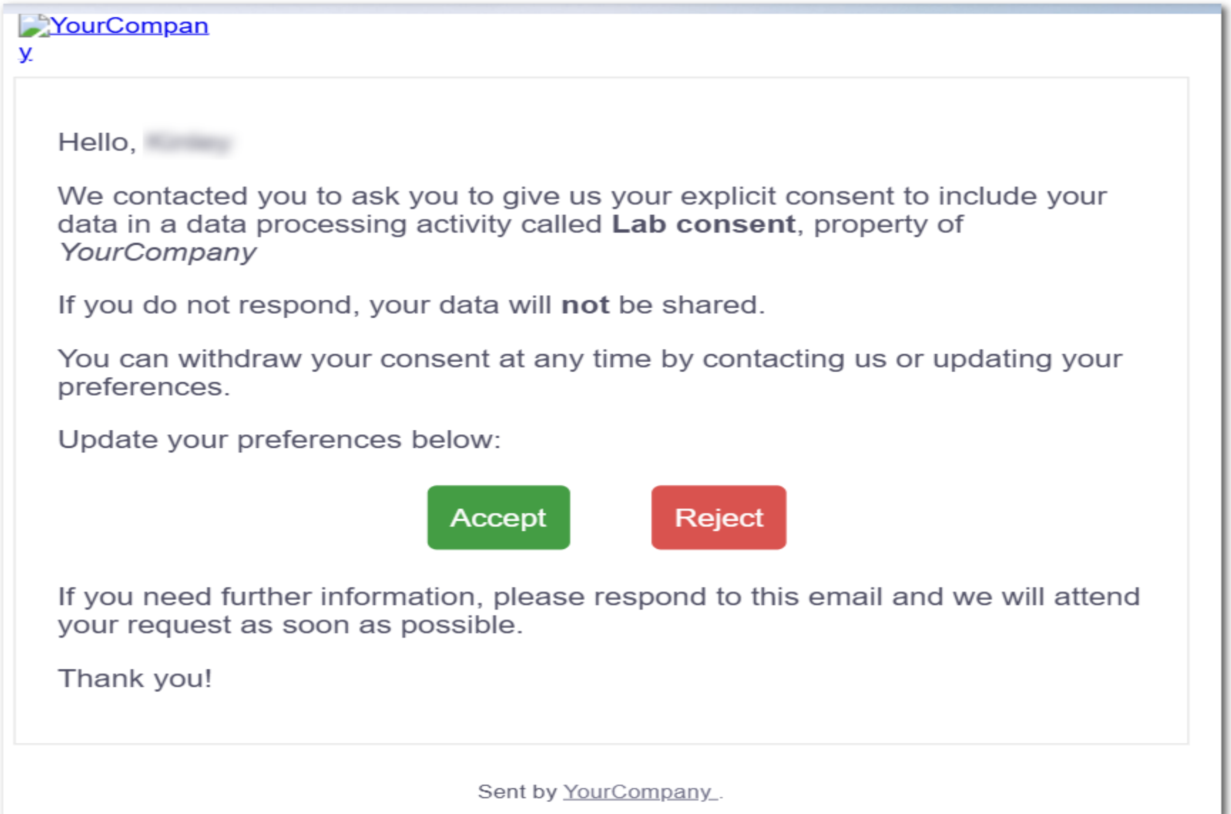


Figure 62: Privacy Consent Email

- 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.

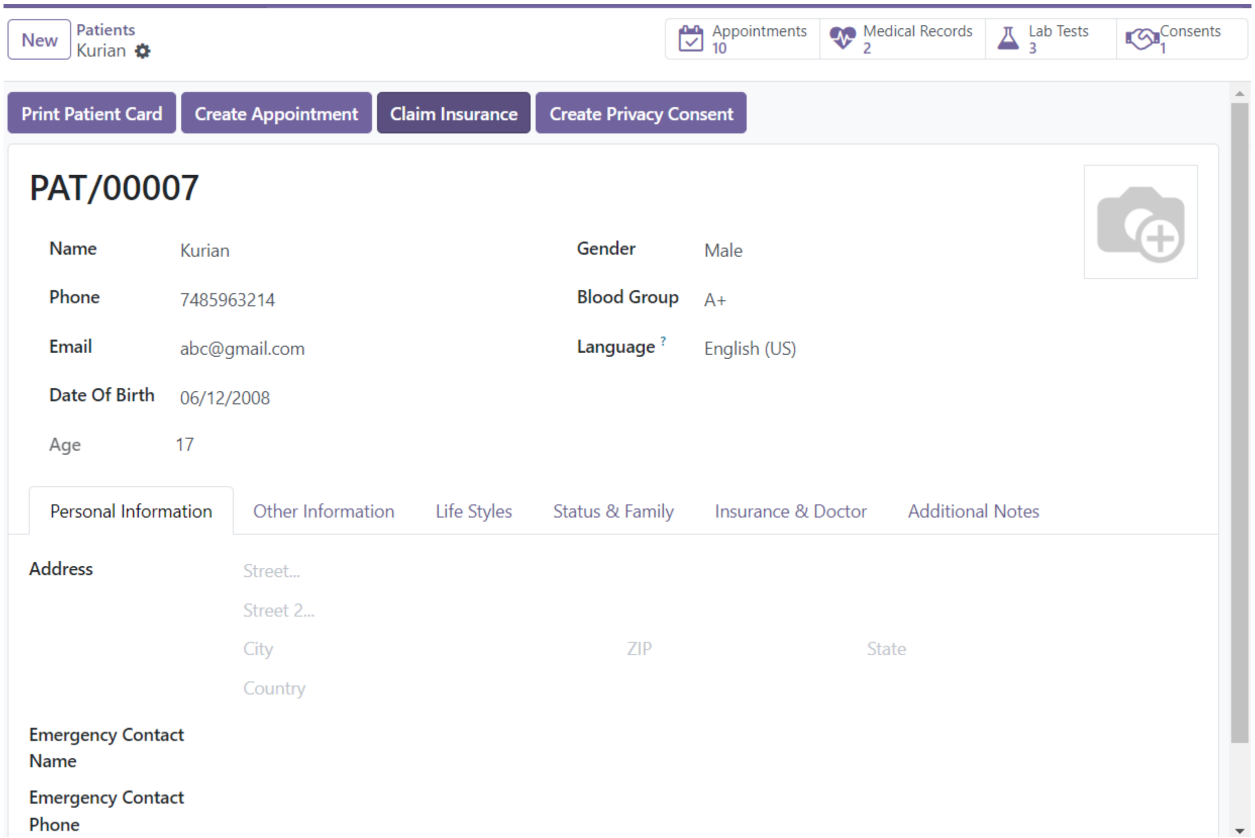


Figure 64: View and create individual consent

- 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**.

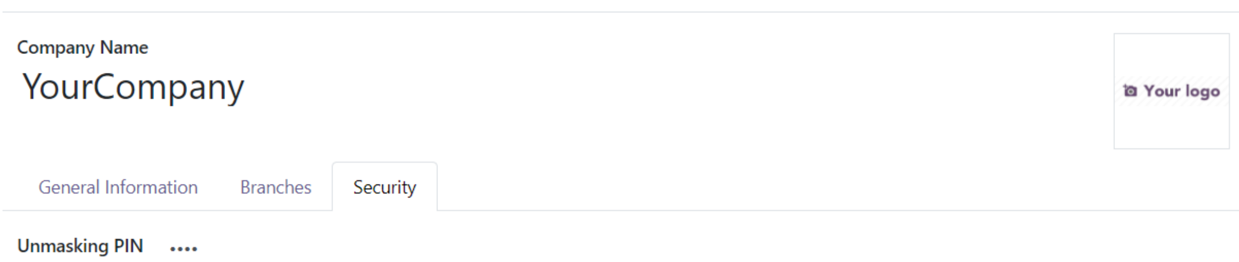


Figure 65: Pin Hidden

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

Figure 66: Email/Phone Number Hidden

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.

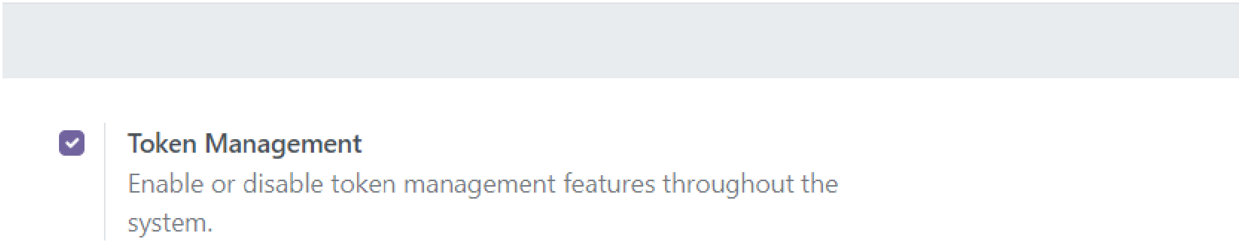


Figure 68: Token Management Enabling

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.

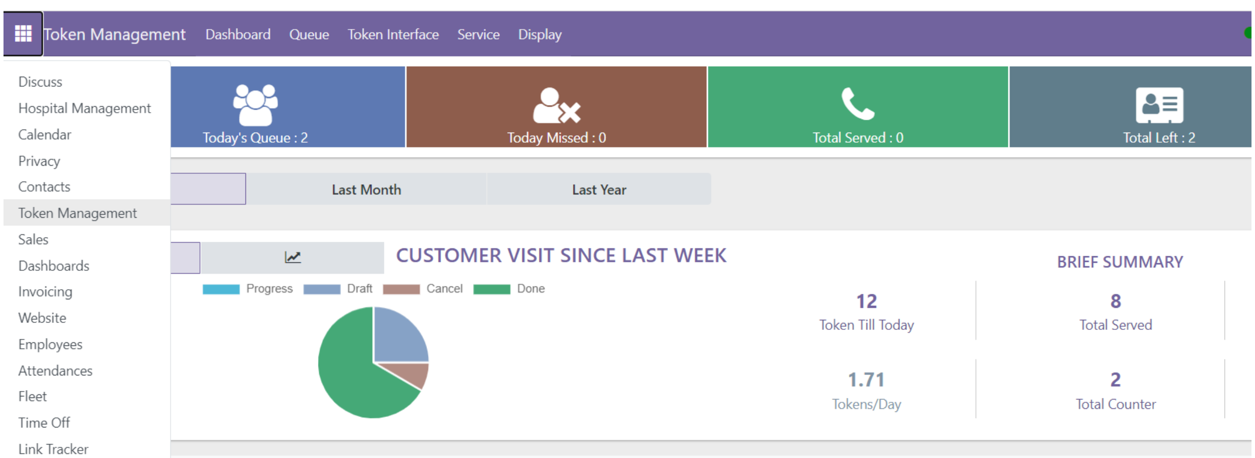


Figure 69: Token Management View

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

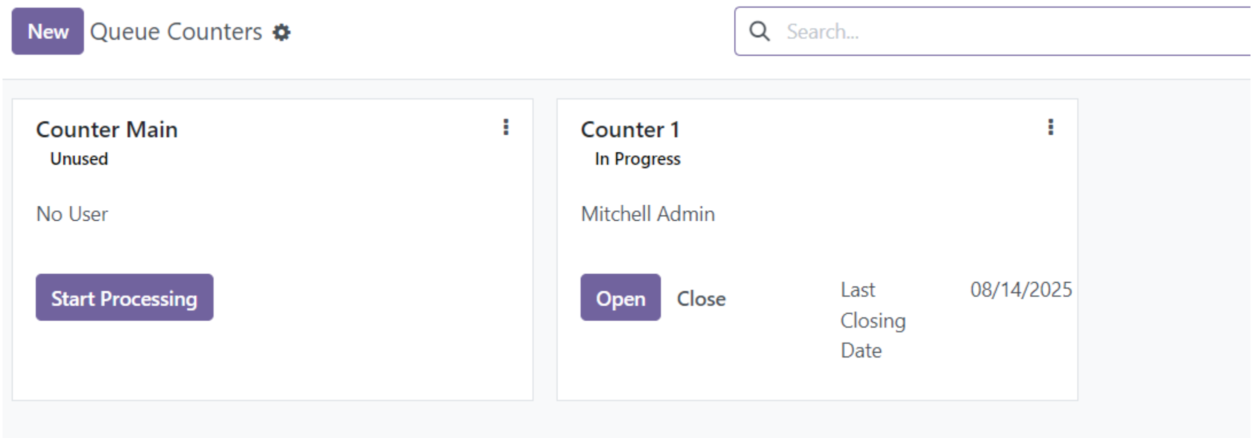
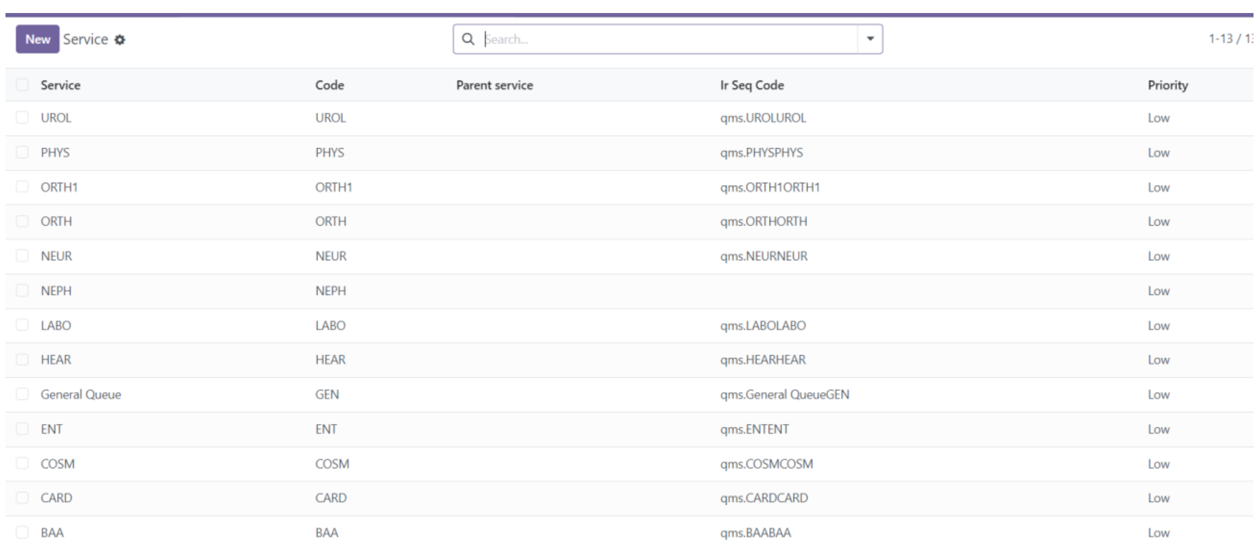


Figure 70: Token Queue Counter

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



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

Figure 71: Services

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

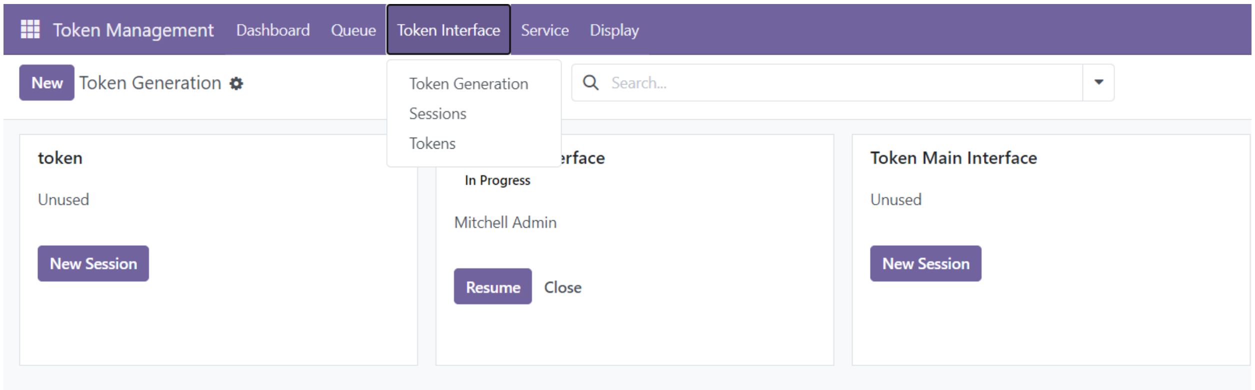


Figure 72: Token Interface Menu

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

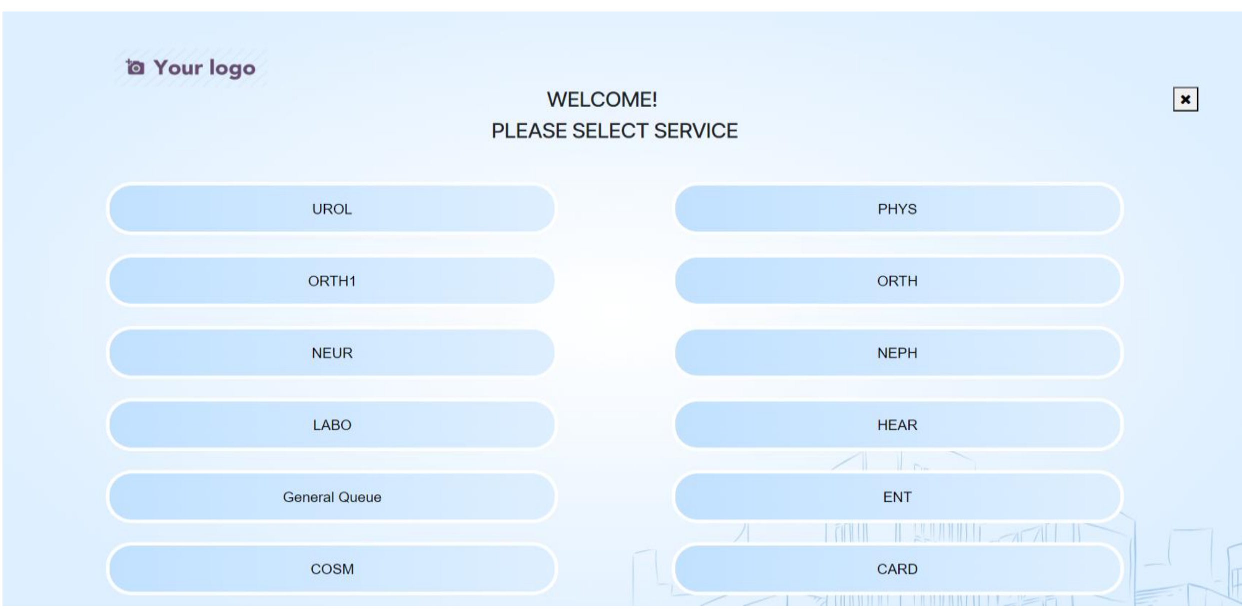


Figure 73: Token Generation Services

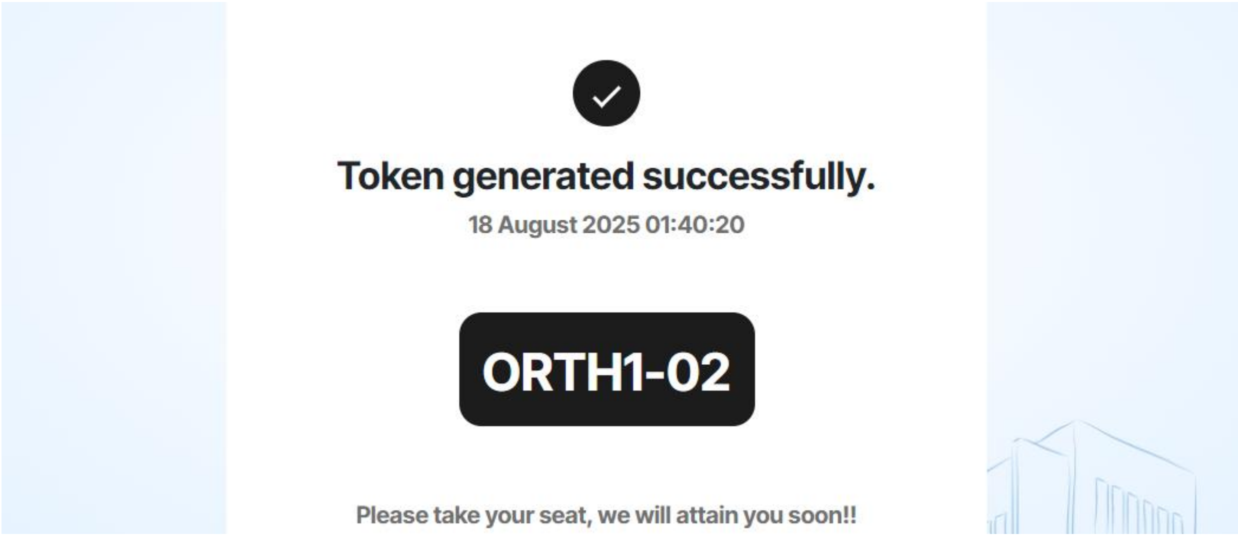


Figure 74: Token Generated View

5. 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.

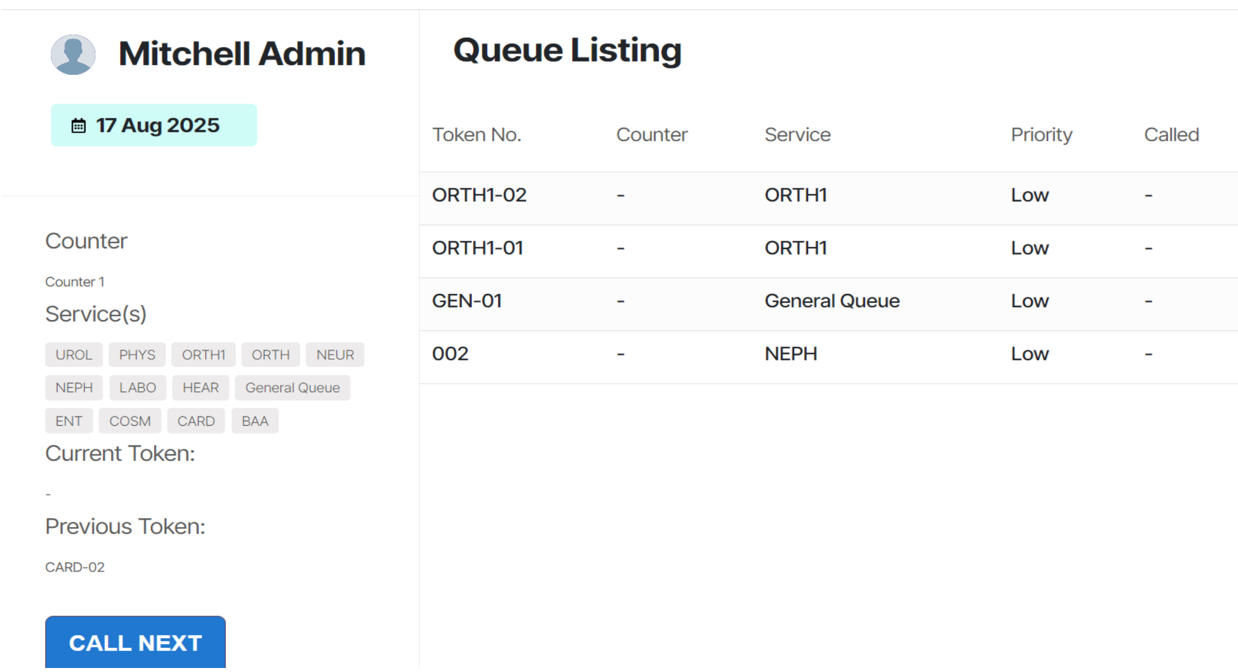


Figure 75: Queue Listing View

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.

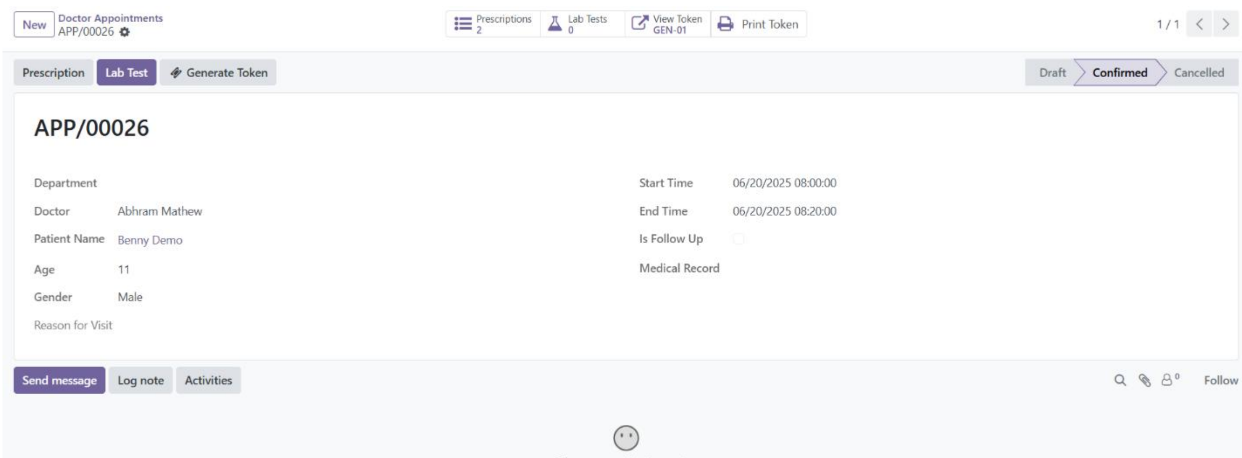


Figure 76: Generate Token / View Token Button

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.

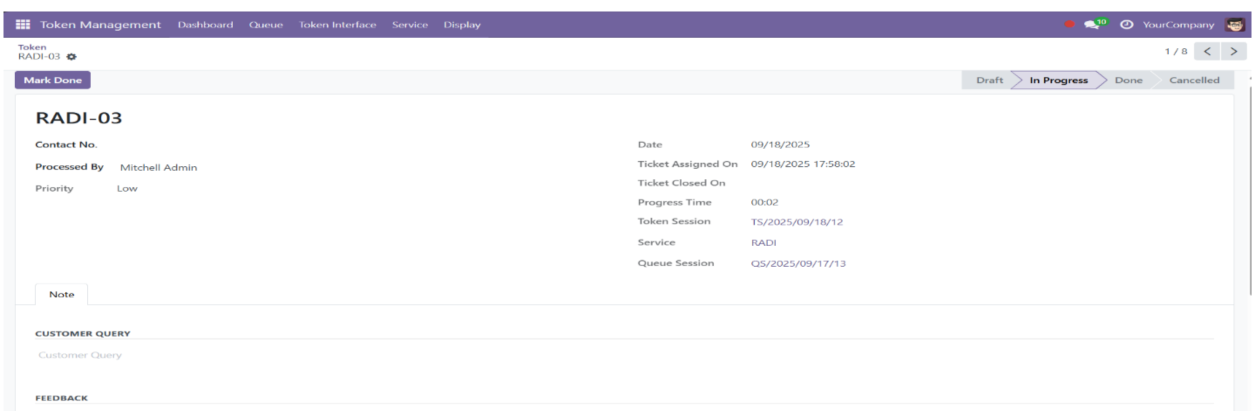


Figure 77: Token Details View

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

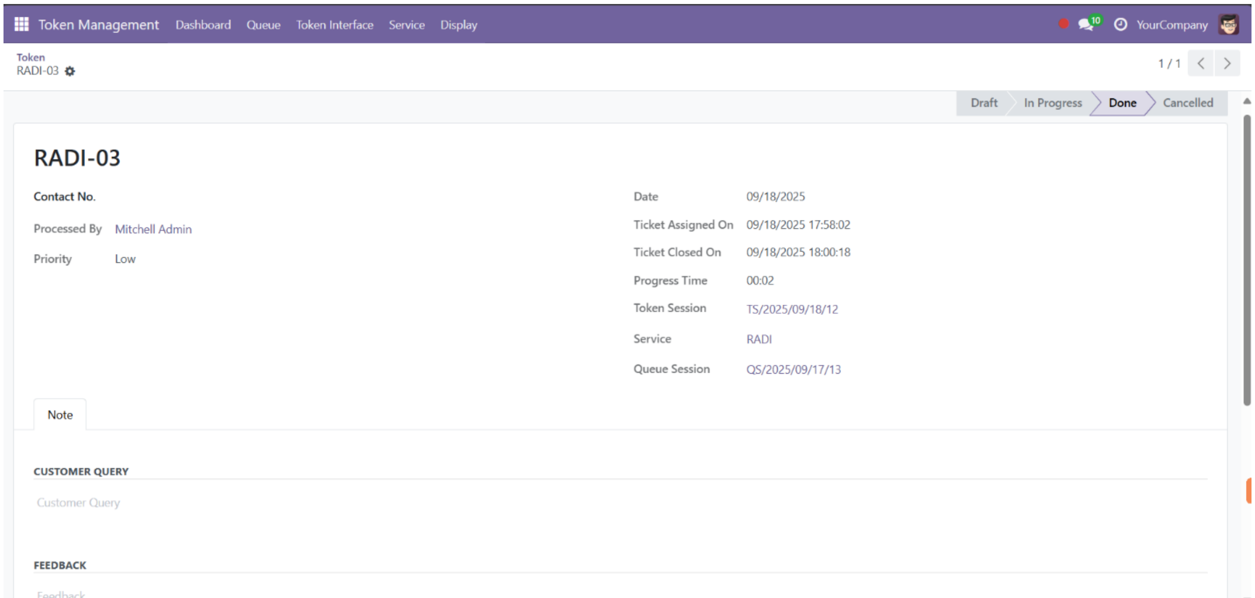


Figure 78: Token Status

4.7 Invoicing Prescriptions

Creating an Invoice

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

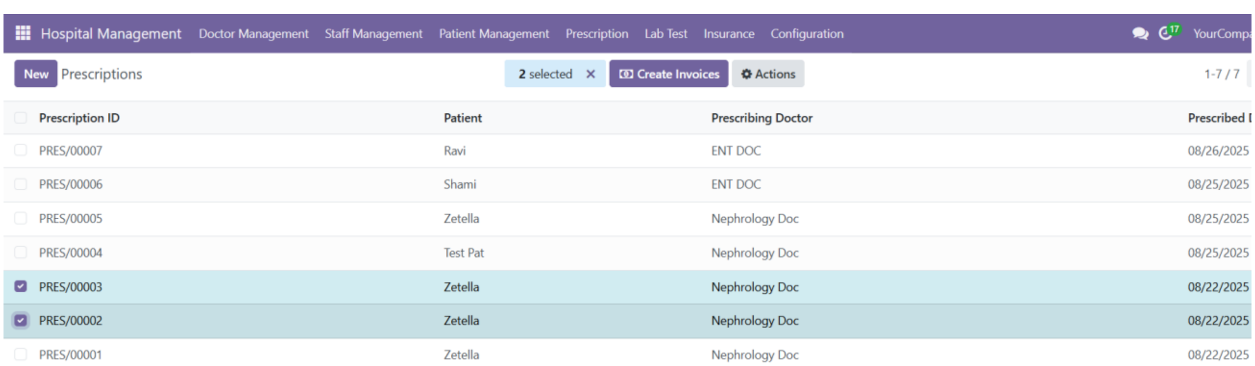


Figure 79: Invoice Creation

3. System will:
    - Create a draft invoice
    - Add all prescription items as invoice lines
4. Review and post the invoice

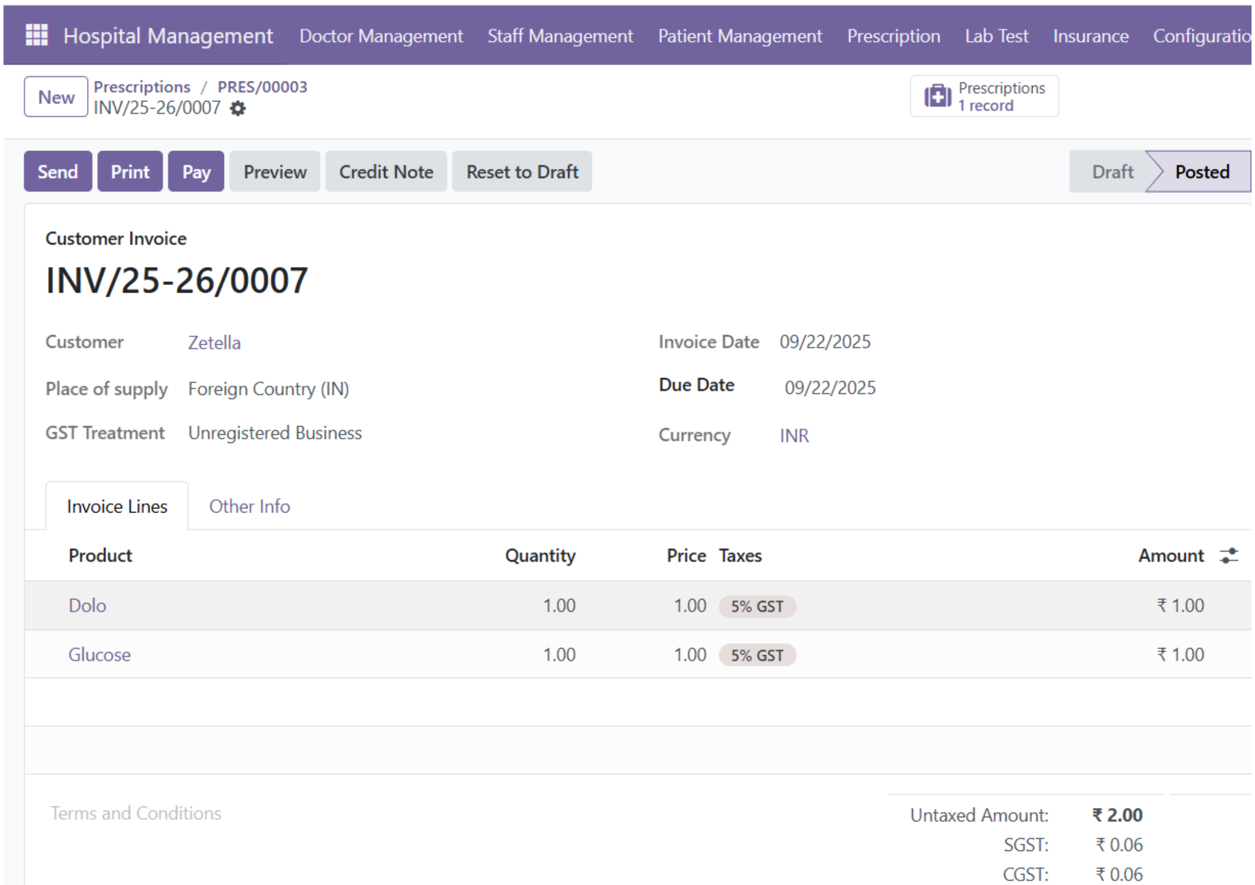


Figure 80: Invoice View

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

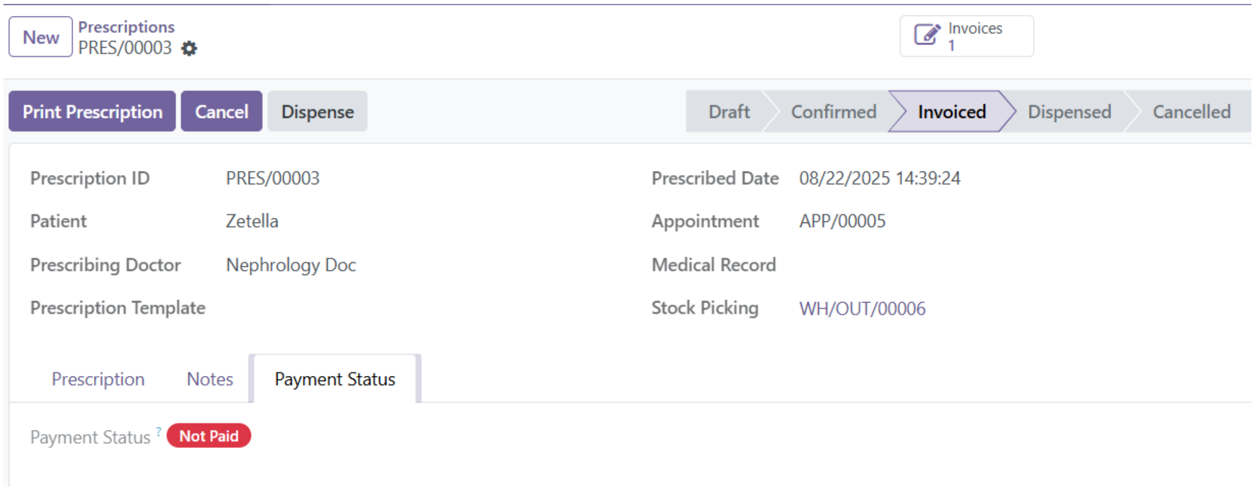


Figure 81: Payment Status

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.

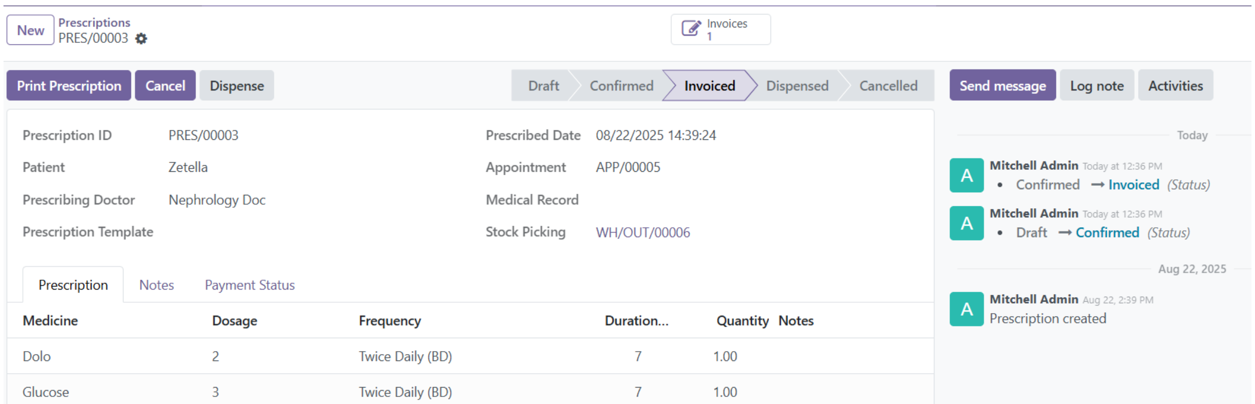


Figure 82: Confirmed Invoice Stock Picking

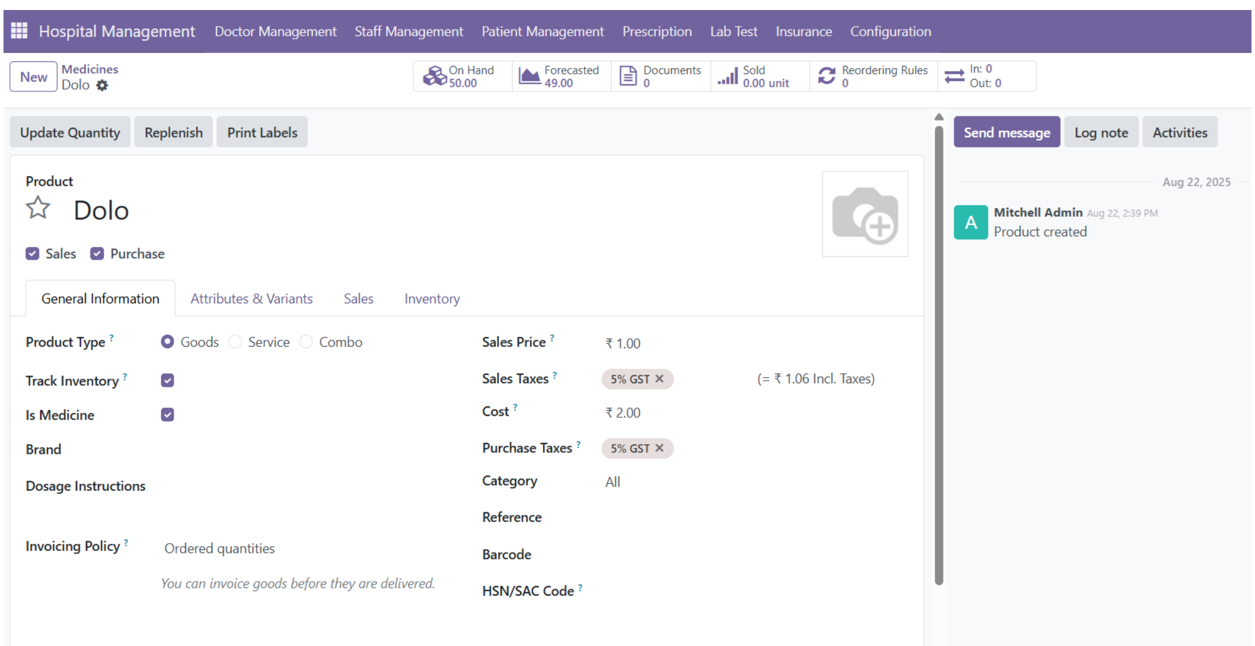


Figure 83: Forecasted Quantity Update

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.

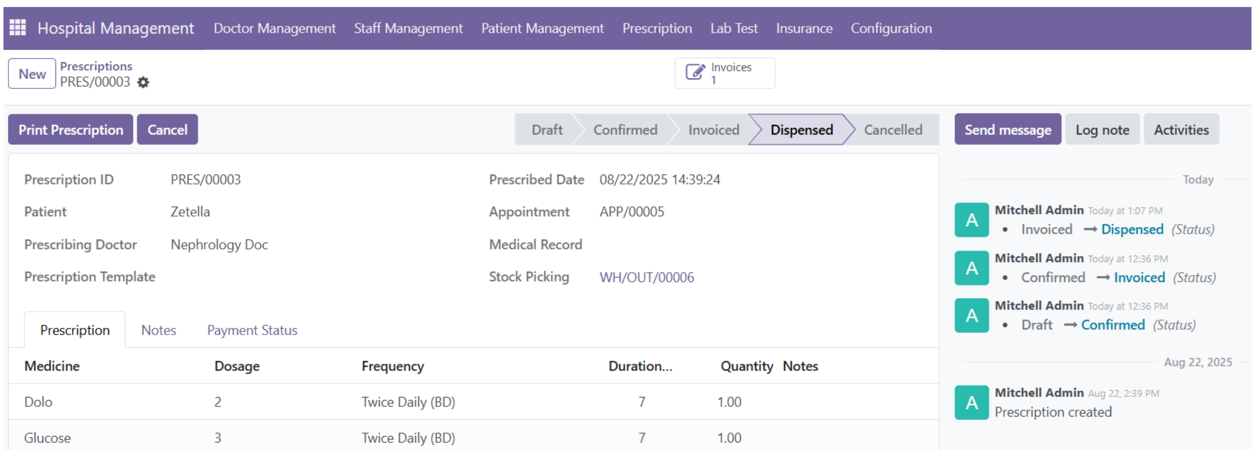


Figure 84: Prescription Medicine Dispensed View

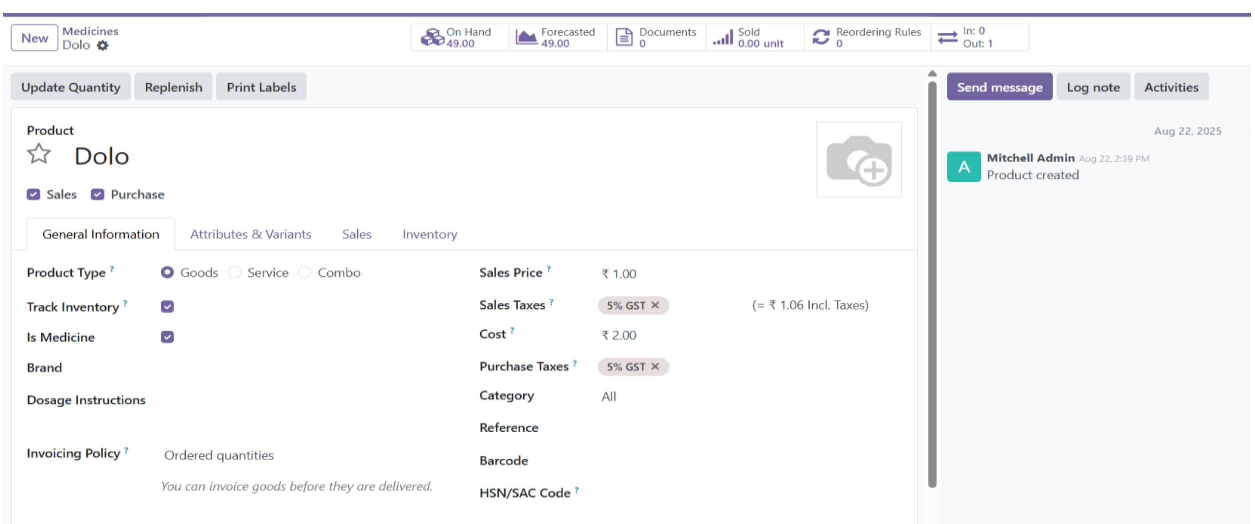


Figure 85: On Hand Quantity Update

Medicine Low Stock Alert Configuration

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

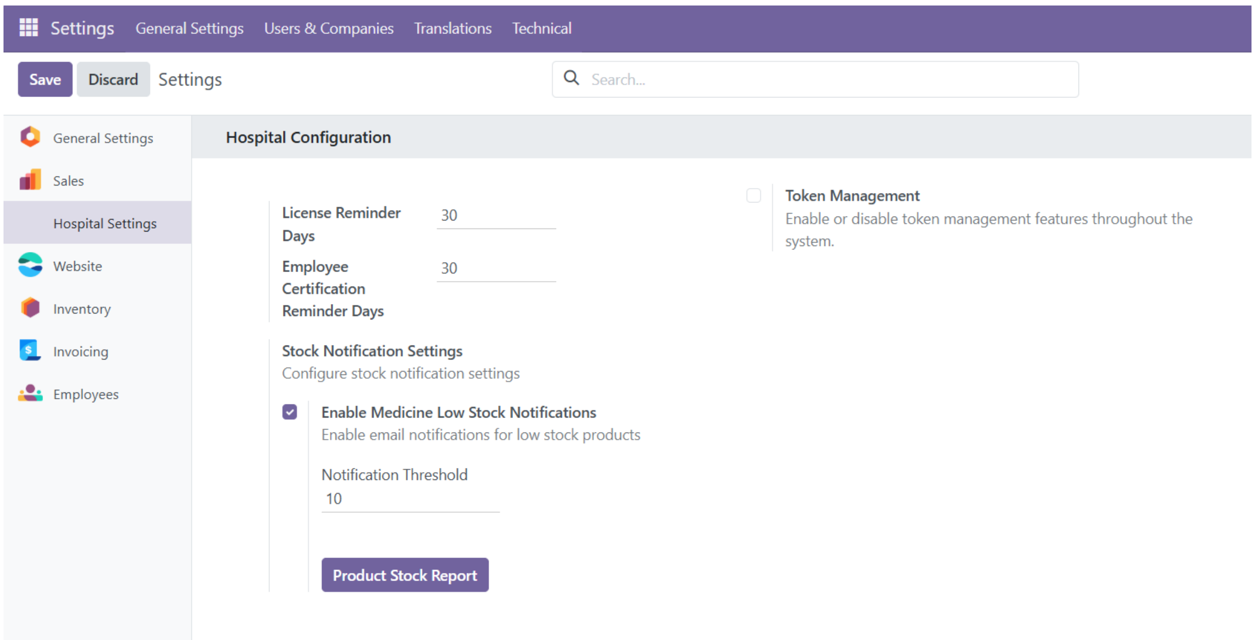


Figure 86: Notification Enable

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.

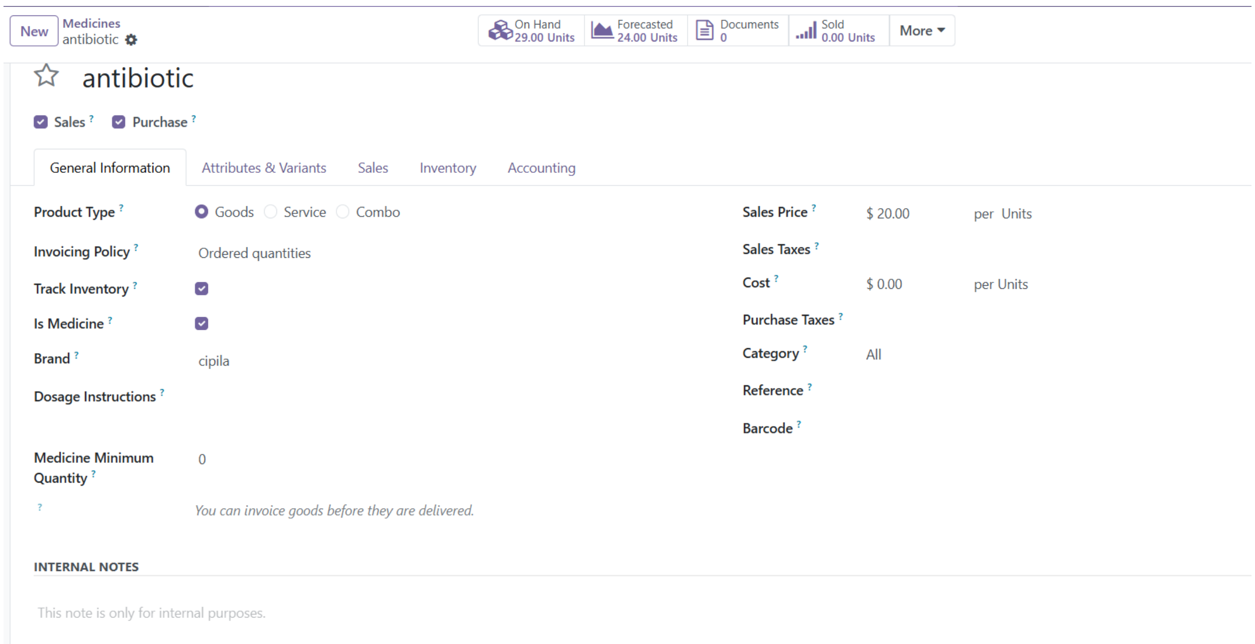


Figure 87: Medicine Product's Minimum Quantity

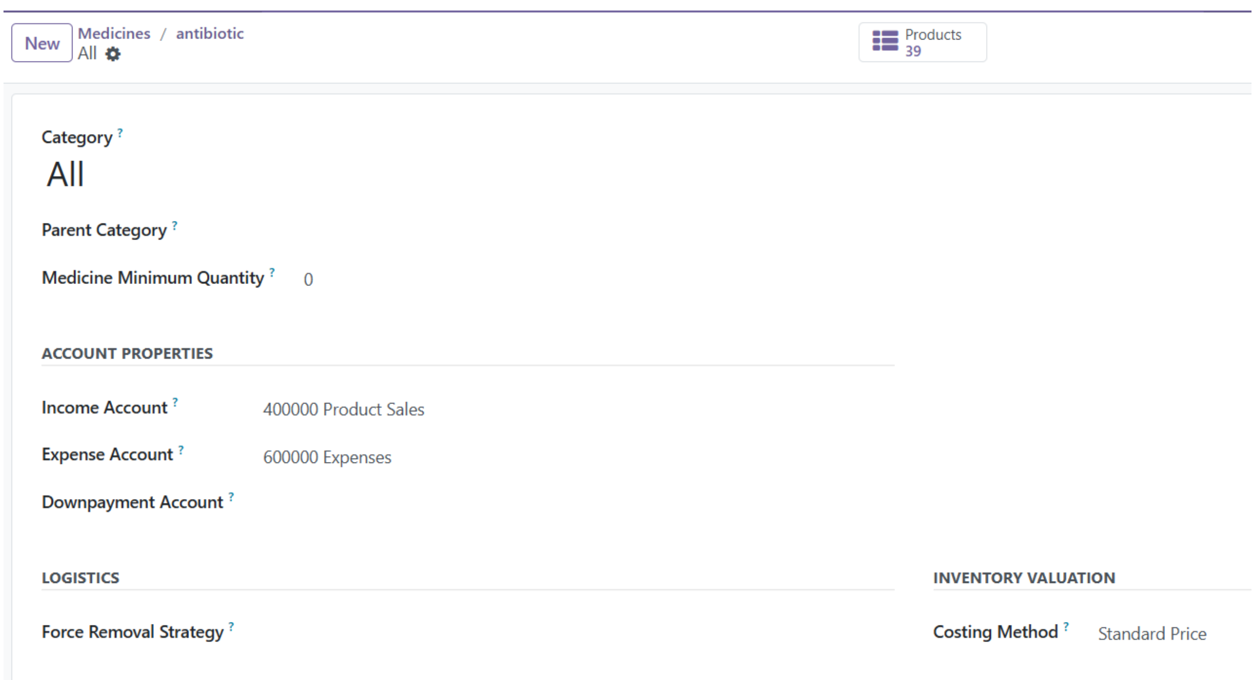


Figure 88: Medicine Category's Minimum Quantity

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**.

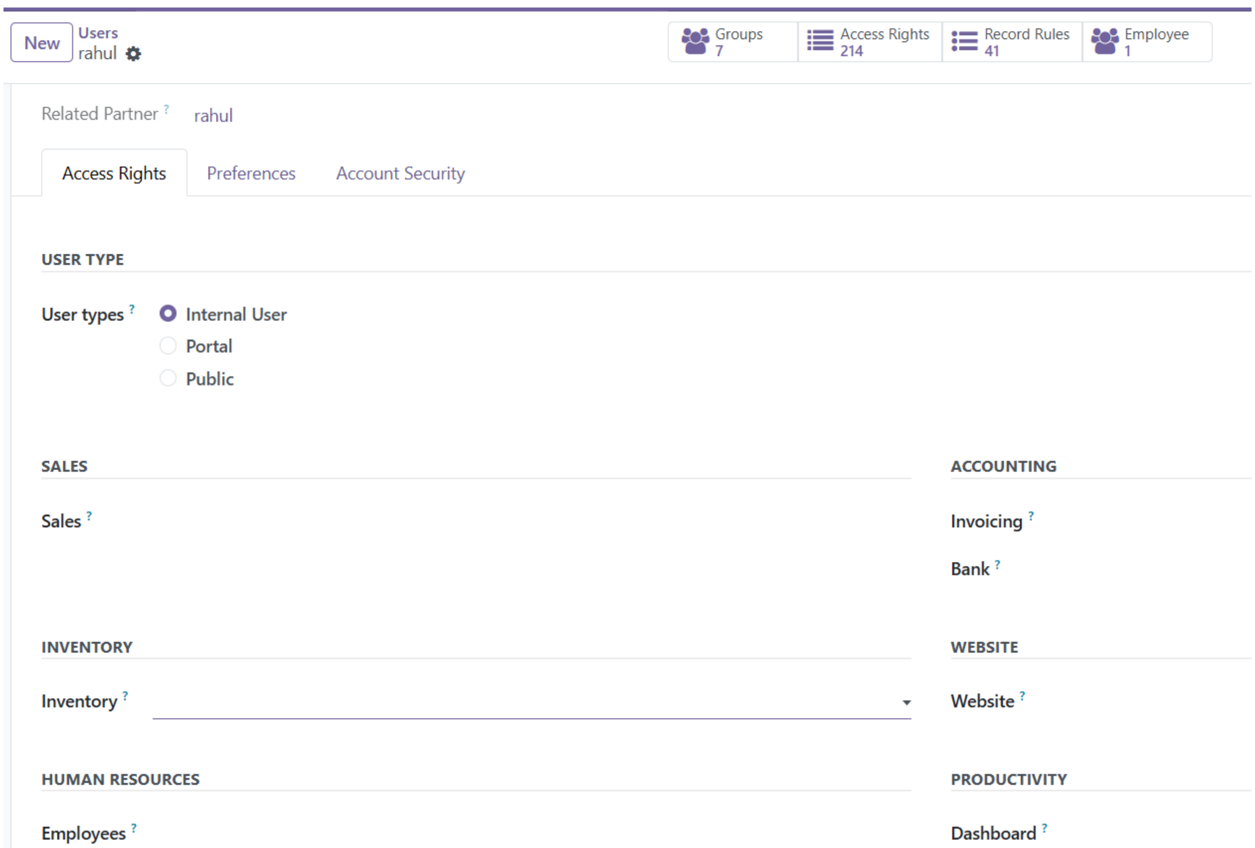


Figure 89: User View

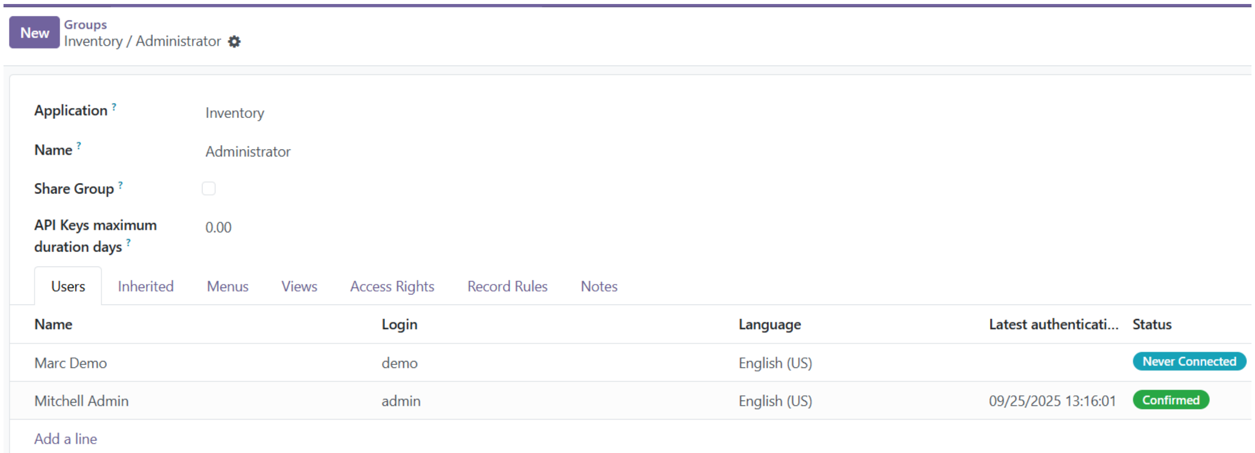


Figure 90: Group View

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.

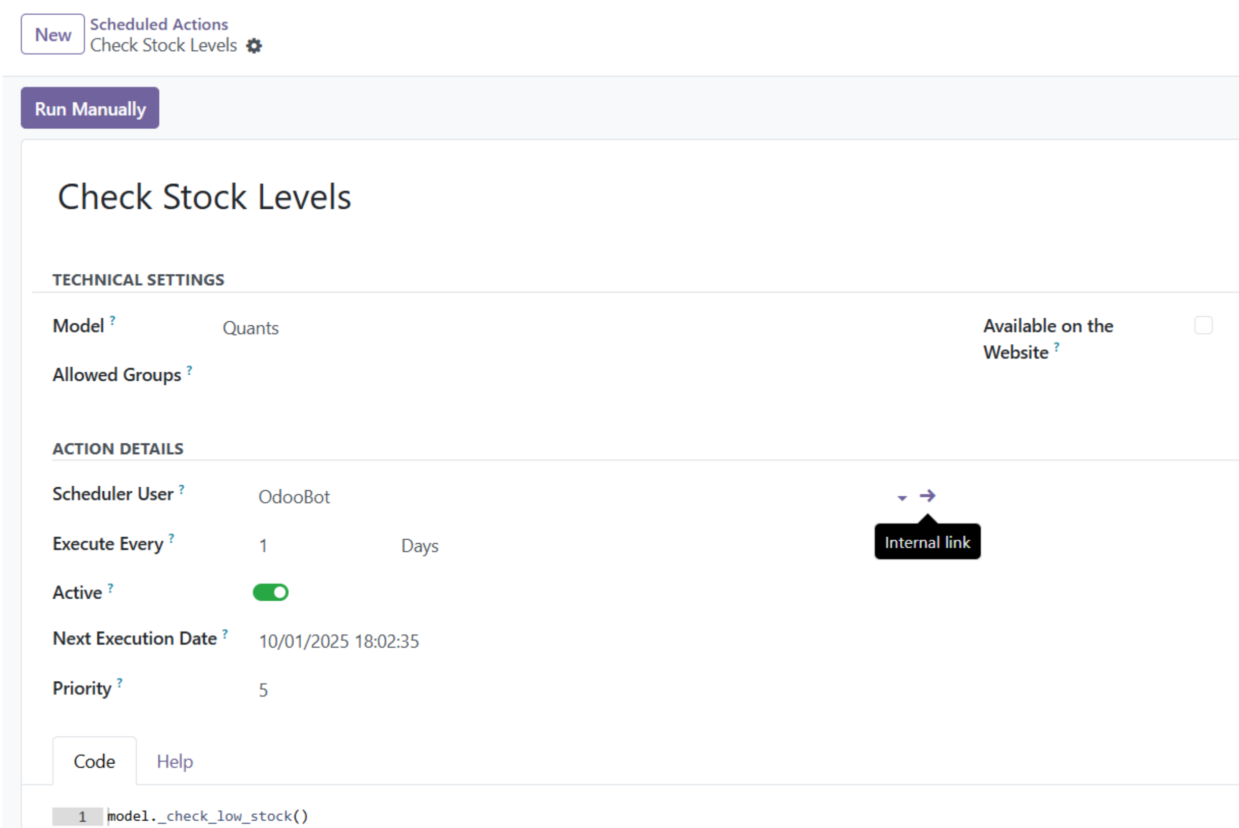


Figure 91: Cron Job

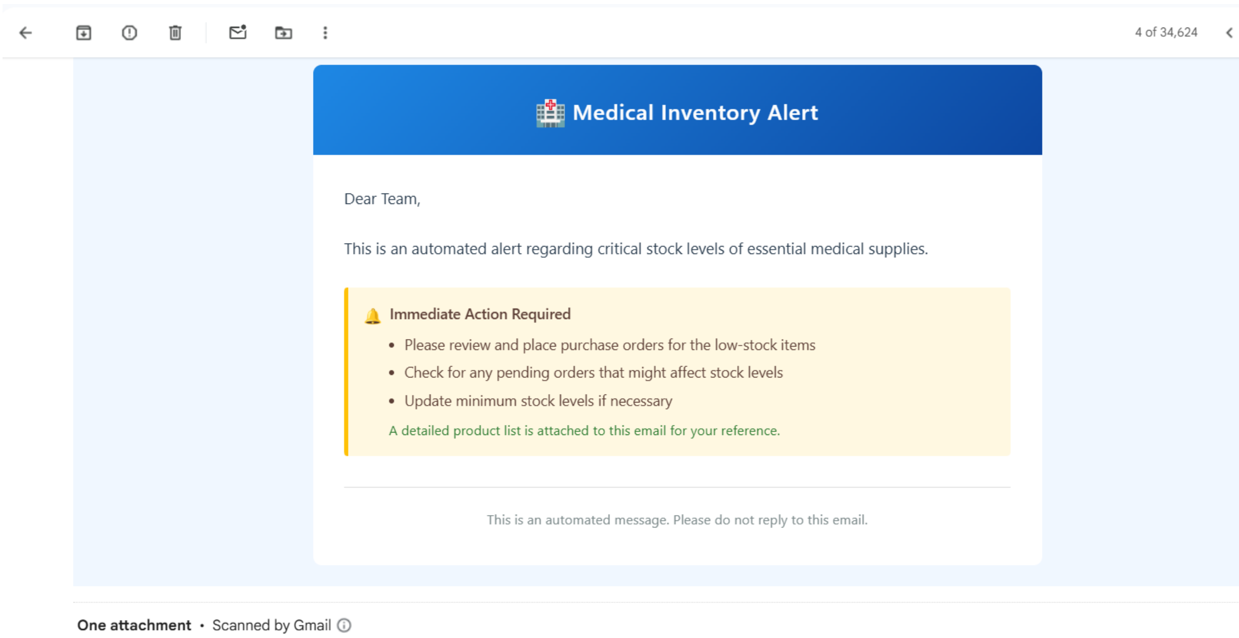


Figure 92: Email Notification

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.