

Clinic Management System

CLINIC OWNER USER MANUAL

A complete guide to managing your clinic's daily operations: patients, appointments, medical records, billing, inventory and reporting.

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1. Introduction

1.1 About the System

The Clinic Management System (CMS) is a web-based application that helps clinic owners run their clinics efficiently. It brings patient records, appointments, medical records, billing, inventory and reporting together in one place, so you can manage your clinic from a single dashboard. The system is available in both English and Myanmar (Burmese) and can be accessed from any device with a modern web browser.

1.2 Key Features

The table below summarises the main features of the system and where they are used.

Feature	Description
Dashboard	At-a-glance view of today's appointments, revenue, patient counts and upcoming appointments.
Patient Management	Register, search, import/export and manage complete patient profiles.
Appointments	Schedule, confirm, check in, complete or cancel appointments with automatic availability checking.
Medical Records	Create and maintain diagnosis, treatment notes, prescribed medications and lab results per patient.

Feature	Description
Billing & Invoicing	Generate invoices, add line items with discounts and tax, record payments and track balances.
Inventory	Track medicines and supplies, stock levels, reorder alerts, expiry and suppliers.
Services	Define your clinic's services with pricing, duration and category.
Staff Management	Create user accounts for doctors and staff with role-based permissions.
Reports	Billing, revenue, appointment and patient reports with CSV export.
Clinic Settings	Configure clinic profile, timezone, currency, tax rate and business hours.
Language Support	Switch between English and Myanmar at any time.

1.3 User Roles

The system uses role-based access control. As the clinic owner (Clinic Admin) you have access to every module. The roles available in the system are:

Role	Typical User	Main Responsibilities
Clinic Admin (Owner)	You	Full access to all modules; manage staff, settings, services, reports and finances.
Doctor	Doctors	View their assigned patients and appointments; create medical records; consult patients.
Nurse	Nursing staff	Help with patients and appointments; manage inventory usage.
Cashier	Front desk / cashier	Create invoices and record payments; view appointments.
Office Staff	Reception office	Manage appointments, patients and billing.
Staff	General staff	Basic access to appointments and patients.

Important: Module access for non-admin users is controlled per-user (General Work, Inventory, Invoices, Reports). You grant these permissions when you create or edit a staff account.

2. Getting Started

2.1 System Requirements

Requirement	Detail
Web browser	A current version of Chrome, Edge, Firefox or Safari. The system works on desktop, tablet and mobile.
Internet / network	Access to the server where the system is hosted (local network, or the internet for cloud hosting).
Account	A user account created for your clinic, plus your username and password.

2.2 Accessing the System

Open your web browser and go to the address provided by your system administrator or hosting provider. The login page is usually located at:

```
http://<your-server>/clinic-system/public/login
```

2.3 Registering a New Clinic

If your clinic does not have an account yet, you can create one from the **Register** page (usually at `/register`). You will need:

- Clinic details: clinic name, email, phone and address.
- Owner details: your first name, last name, email, phone and username.
- A password of at least 8 characters (enter it twice to confirm).

After registration you will receive a **clinic code** and can log in immediately. Keep your clinic code safe - it identifies your clinic in the system.

2.4 Logging In

To log in:

Go to the login page.

Enter your **username** and **password**.

Click **Login**. You will be taken to your clinic dashboard.

Note: If you enter the wrong credentials, an error message is shown and you can try again. After a successful login the system records an audit entry.

2.5 Forgot Password

If you forget your password, click **Forgot Password** on the login page, enter the email address registered to your account, and follow the instructions sent to you. Reset tokens are valid for 1 hour. If you do not receive the email, contact your system administrator, who can reset your password for you.

2.6 Changing the Display Language

The system supports English and Myanmar. Use the **language selector** (EN / MY) in the top right corner of the screen to switch. Your choice is remembered on your device for the next visit.

2.7 Logging Out

Click the user menu in the top right corner and choose **Logout**, or use the Logout link at the bottom of the sidebar. Always log out when you leave your computer, especially on shared devices.

3. Dashboard Overview

The dashboard is the first screen you see after logging in. It gives you an overview of your clinic's activity for the day.

3.1 Key Performance Indicators (KPI Cards)

Card	Shows
Today's Appointments	Total appointments today, with counts of completed and cancelled.
Today's Revenue	Revenue collected today, with percentage change compared with yesterday.
Total Patients	The total number of patients registered at your clinic.
Upcoming (next 7 days)	How many appointments are scheduled in the next seven days.

3.2 Quick Actions

The Quick Actions panel provides shortcuts to the most common tasks:

- New Appointment - start scheduling an appointment immediately.
- New Patient - register a new patient.
- View Calendar - open the appointment calendar.
- All Patients - go to the patient list.

3.3 Today's Appointments

This table lists today's appointments with the time, patient, service and status. Use the action buttons to view an appointment or to check a patient in. Click **View All** to see the full appointment list for the day.

3.4 Recent Patients and Upcoming Appointments

The right-hand column shows your five most recently registered patients and your upcoming appointments. Click any entry to open the related patient or appointment.

4. Staff and User Management

As clinic owner you are responsible for creating accounts for your doctors and staff. Go to **Staff** in the sidebar (under the Staff heading) to open User Management.

4.1 Adding a Staff Member

Click **New Staff** and complete the form:

- First name and last name - the person's full name.
- Email and phone - contact details (email must be unique).
- Username - used to log in.
- Password - at least 6 characters; enter it twice to confirm.
- Role - Doctor, Nurse, Cashier, Office Staff or Staff.
- Active status - tick to make the account usable immediately.

For doctors, additional professional details can be entered: specialization, license number, qualifications and working hours.

After saving, you are taken back to the staff list. The account can be used to log in right away.

4.2 Roles and Module Permissions

Every staff account is given default permissions based on its role. You can fine-tune access on the edit screen for each user. The four modules are:

Module	Grants Access To
General Work	Patients, appointments, medical records and services.
Inventory	Inventory items, stock movements and suppliers.
Invoices	Invoicing and payment recording.
Reports	Reports and exports.
Role	Default Module Access
Clinic Admin (Owner)	All modules (cannot be restricted).

Role	Default Module Access
Doctor	General Work.
Nurse	General Work + Inventory.
Cashier	General Work + Invoices.
Office Staff	General Work + Invoices.
Staff	General Work.

4.3 Editing a Staff Member

In the staff list, use the actions on each row to open a user, edit their details or permissions, activate/deactivate them, or reset their password. You cannot delete your own account.

4.4 Activating / Deactivating Users

An inactive user cannot log in. Deactivate an account when a staff member leaves, and reactivate it if they return. Their history and permissions are preserved.

4.5 Resetting a Password

If a staff member forgets their password, use the reset action from their row to set a new password for them. Tell them to change it after logging in.

4.6 Managing Doctors

Open **Doctors** from the sidebar to view doctor profiles, their specializations, license numbers and working hours. You can add, edit or remove doctor profiles and view each doctor's appointment statistics.

5. Services Management

Services are the treatments, consultations and procedures your clinic offers (for example, General Consultation, Blood Test, Chest X-Ray, Flu Vaccination). Services are linked to appointments and invoices, so keeping this list up to date is important.

5.1 Adding a Service

Open **Services** in the sidebar and click **Add New Service**. Enter:

- Service name - for example "General Consultation".
- Description - what the service includes.
- Price - the standard price charged.
- Duration - how long the service takes in minutes (used for scheduling).
- Category - optional grouping (e.g. Consultation, Laboratory, Surgery, Therapy).
- Active - tick to make the service available for booking.

5.2 Editing a Service

From the services list, open a service to edit it. Changes to the price affect new appointments and invoices only. Changes to the duration can affect existing appointments, so review them before saving.

5.3 Activating / Deactivating Services

Inactive services cannot be selected when scheduling appointments or creating invoices. Deactivate a service you no longer offer rather than deleting it, so historical records stay consistent.

6. Patient Management

Patients are the heart of your clinic. Open **Patients** in the sidebar to see the list with summary statistics: total patients, active patients, new patients this month and the average age.

6.1 Adding a New Patient

Click **New Patient** and complete the registration form:

- First name and last name (required).
- Date of birth, gender, phone and email.
- Address and emergency contact details.
- Medical information: allergies, existing conditions, current medications and blood type.
- Physical data: height (cm) and weight (kg). The system calculates BMI automatically.
- Notes for any additional information.

The phone number should be entered in Myanmar format starting with 09 (for example 09 123 456 789). Each patient is automatically given a unique patient code for identification.

6.2 Viewing a Patient's Profile

Open any patient to see their full profile: contact details, medical information, first and last visit dates, total visits, appointment history, recent medical records and their assigned doctors.

6.3 Searching for Patients

Use the search box to find patients by name, phone or code. Results can be filtered by status (active or inactive).

6.4 Importing and Exporting Patients

You can **export** all patients to a CSV file (Patient ID, name, date of birth, age, gender, phone, email, blood type, status and created date) and **import** patients from a CSV file. The import file needs a header row and one patient per line in this order: first name, last name, phone, email, date of birth (YYYY-MM-DD), gender. The result is reported after import, including any rows that failed.

6.5 Assigning Doctors to a Patient

From a patient's profile, use **Assignments** to choose which doctors treat this patient. Assigned doctors can see the patient's details and schedule appointments for them. This is useful when a patient has a regular treating doctor.

Note: Deleting a patient with an appointment history deactivates the patient instead of permanently removing them, to protect their clinical history. Only patients with no appointments can be permanently deleted.

7. Appointments

Open **Appointments** in the sidebar to manage your clinic's schedule. You can view appointments for any date, filter by status, and use the calendar view for a month overview.

7.1 Scheduling an Appointment

Click **New Appointment** and complete the form:

- Patient - select the patient from the list.

- Service - the treatment or consultation.
- Doctor - who will see the patient.
- Date and time - pick a date, then check the available time slots.
- Duration - in minutes (defaults to the service duration).
- Type - e.g. Consultation, Follow Up, Procedure.
- Notes - any instructions for the visit.

The system checks that the chosen slot is free before saving. You cannot book two appointments for the same doctor at the same time.

7.2 Checking Availability

When you select a date and a doctor, the form shows the time slots that are still available. Choose an available slot to continue. If a slot is taken, pick another time.

7.3 Appointment Statuses

Status	Meaning
Scheduled	The appointment has been created.
Confirmed	The appointment has been confirmed with the patient.
Checked In	The patient has arrived at the clinic.
In Progress	The patient is currently with the doctor.
Completed	The visit is finished.
Cancelled	The appointment was cancelled.
No Show	The patient did not attend.

7.4 Changing an Appointment's Status

Open an appointment and use the status buttons, or use the quick check-in button on the dashboard. A typical visit follows the status flow: Scheduled → Confirmed → Checked In → In Progress → Completed. When you complete an appointment, the system reminds you to create the medical record and the invoice.

7.5 Calendar View

Open **Calendar** to see the whole month at a glance. Navigate between months and click an appointment to open it. This is ideal for planning clinic capacity and doctor schedules.

7.6 Editing and Deleting Appointments

You can edit an appointment to change the patient, service, doctor, date, time or notes. Deletion cancels the appointment (it is recorded as Cancelled with the note "Deleted by user").

8. Medical Records

Open **Medical Records** in the sidebar (records are grouped under the Clinical section). Medical records capture the clinical details of each patient visit and are the basis for continuity of care.

8.1 Creating a Medical Record

Click **New Record** (or create one directly from a completed appointment):

- Select the patient (and the related appointment, if any).
- Select the attending doctor.
- Enter the diagnosis and treatment notes.
- Add prescribed medications - the system shows the medication list and current stock.
- Add lab tests / results and any additional observations.
- Save the record.

If the recommended medication quantity is not available, the system warns you so you can adjust the stock before prescribing.

8.2 Viewing and Editing Records

The record list can be filtered by patient, doctor, date range or a search term. Open any record to view its full details and edit it if needed. From a patient's profile you can also see their most recent records.

8.3 Printing a Record

Use the print button on a record to produce a clean, printable summary. The printed copy is marked **Confidential** and is suitable for patient handover or filing.

Note: Medical records contain sensitive patient information. Only staff with General Work access, and only for patients they are allowed to see, can view them. Doctors see only their own patients unless you assign them.

9. Billing and Invoicing

Open **Invoices** in the sidebar (under the Operations heading) to manage billing. The invoice list shows invoices for the current month by default, with a summary of total amount, paid and outstanding balance. You can filter by status and date range.

9.1 Creating an Invoice

Click **New Invoice** and complete the form:

- Select the patient.
- Optionally link the invoice to a completed appointment.
- Set the invoice date and due date.
- Add line items: description, quantity, unit price, discount % and tax %.
- Add any notes (optional).

Each item can be a service from your services list or an ad-hoc charge (for example medicines or consumables). The invoice totals are calculated automatically. Every invoice receives a unique invoice number (for example INV-00001).

9.2 Invoice Statuses

Status	Meaning
Unpaid	No payment has been received yet.
Partial	Some payment has been received; a balance remains.
Paid	The invoice has been fully settled.
Overdue	The due date has passed and the invoice is not fully paid.

9.3 Recording a Payment

Open an invoice and use **Record Payment**. Enter the amount, payment date, payment method (for example cash) and, if applicable, a transaction reference. Each payment is recorded on the invoice and the balance is updated automatically. You can record several payments against one invoice (for example a deposit and a final payment).

9.4 Revenue Report

The **Revenue** screen (or the Revenue report under Reports) shows income grouped by day or by month for a chosen date range, including total revenue, amount collected and outstanding balance. Use it to track cash flow and compare performance over time.

10. Inventory Management

Open **Inventory** in the sidebar to track medicines, supplies and equipment. The list can be filtered by search term, category, or to show only items below their reorder level (low stock).

10.1 Adding an Inventory Item

Click **Add New Item** and complete the form:

- Name and description.
- Category, unit (e.g. pcs, bottle, box) and SKU.
- Opening quantity and reorder level (the level at which you want to be alerted).
- Cost price and selling price.
- Supplier, storage location, expiry date and batch number (optional).

10.2 Managing Stock Levels

Use **Add Stock** to record new stock received, and **Use Stock** to record stock consumed (for example when medication is dispensed). These movements are tracked so your stock levels always reflect reality.

10.3 Low Stock Alerts

Items whose quantity falls below the reorder level appear in the low-stock view and on the dashboard alert so you know when to reorder.

10.4 Suppliers

Use the **Suppliers** area to keep a list of your suppliers (name, contact person, phone, email, address, and notes). Each inventory item can be linked to a supplier, which makes reordering easier. You can add, edit, view and remove suppliers at any time.

11. Reports

Open **Reports** in the sidebar to analyse your clinic's performance. Every report can be filtered by date range and exported to CSV for use in Excel or accounting software.

Report	What It Shows
Billing Report	All invoices in the selected period with patient, total, paid, balance and status; plus a summary of totals.
Revenue Report	Revenue grouped by day or month: invoices, revenue, collected amount and outstanding balance.
Appointments Report	Appointment volume with completion, cancellation and no-show statistics, filterable by doctor and status.

Report	What It Shows
Patients Report	New patients in the period, totals, gender breakdown and age distribution.

11.1 Exporting a Report

Set your date range and filters, then click **Export CSV**. Your browser downloads a comma-separated file you can open in spreadsheet software. Export the billing report at the end of each month to reconcile your accounts.

Note: Reports reflect the data at the moment they are generated. Run them from a computer you trust and keep exported financial data confidential.

12. Clinic Settings

Open **Settings** in the sidebar to configure your clinic. These settings apply across the whole system.

12.1 Clinic Information

Keep your clinic's name, email, phone, website and address up to date. The clinic name is shown in the sidebar and on printed documents.

12.2 Timezone, Currency and Tax

Set the timezone used for scheduling (for example Asia/Yangon), the currency used when displaying prices (for example MMK), and your default tax rate. The currency symbol appears throughout the system, including invoices and the dashboard revenue card.

12.3 Business Hours

Define your opening hours for each day of the week (for example Monday to Friday 09:00-17:00, Saturday 09:00-13:00, Sunday closed). These hours are used when calculating availability for appointments.

13. Profile Management

Use **Profile** (from the user menu in the top right) to manage your own account details.

13.1 Updating Your Profile

You can update your first name, last name, email and phone number. Save your changes when finished - the system remembers when you last logged in and when you joined.

13.2 Uploading a Profile Picture

Upload a photo (JPG, PNG, GIF or WebP, up to 2 MB). The photo appears next to your name in the top right corner. Your previous photo is removed automatically when you upload a new one.

14. Security and Best Practices

14.1 Account Security

- Use a strong password with a mix of letters, numbers and symbols.
- Never share your password with anyone, including other staff members.
- Each staff member should have their own account so actions can be traced.
- Deactivate accounts promptly when someone leaves.

The system protects accounts with secure password hashing (Argon2ID), CSRF protection on every form, and session controls. All important actions are recorded in audit logs which you can ask your system administrator to review.

14.2 Data Entry Best Practices

- Register every patient before booking their first appointment.
- Use the standard Myanmar phone format (09xxxxxxx).
- Complete the medical record at the end of each visit, not later.
- Issue the invoice and record payment on the same day as the visit.
- Keep inventory stock movements up to date as items are used.

14.3 Session and Logout

Your session remains active for a limited time and then expires for security. Always log out on shared computers and keep your password and clinic code confidential.

15. Troubleshooting and FAQ

Question	Answer
I cannot log in.	Check that Caps Lock is off and that you are using the correct username and password. If you still cannot log in, use Forgot Password or ask your system administrator to reset your password.
I do not see some menu items.	Menu items depend on your permissions. As the clinic admin you should see everything; for staff, check their module permissions in Staff > edit.
The time slot I want is not available.	The slot is already booked for that doctor. Pick another time or another doctor.
Can I book two doctors at the same time?	Yes - each doctor has their own schedule. The availability check is per doctor.
Why is a patient only deactivated instead of deleted?	To protect medical history. Patients with appointments are deactivated; only patients with no appointments can be deleted permanently.
How do I give a staff member access to billing?	Edit the user and grant the Invoices module permission.
How do I change the clinic currency?	Settings > Currency. Existing amounts are not automatically converted.
Can I undo a recorded payment?	Payments cannot be deleted from the interface. Contact your system administrator to correct an erroneous payment.
How do I get my monthly financial report?	Reports > Billing Report. Set the month, then Export CSV.
The system language changed - how do I switch back?	Use the EN / MY selector in the top right corner of the screen.

16. Appendix

16.1 Module Permission Summary

Role	General Work	Inventory	Invoices	Reports
Clinic Admin	Yes	Yes	Yes	Yes
Doctor	Yes	No	No	No
Nurse	Yes	Yes	No	No
Cashier	Yes	No	Yes	No
Office Staff	Yes	No	Yes	No
Staff	Yes	No	No	No

Note: clinic admins have full access. All other roles can have their permissions adjusted individually by the clinic admin; the table shows the defaults.

16.2 Appointment Status Flow

Step	Status	Typical Action
1	Scheduled	Appointment created at reception or by the doctor.
2	Confirmed	Patient confirmed the visit.
3	Checked In	Patient arrived; click check-in.
4	In Progress	Patient is with the doctor.
5	Completed	Visit finished; create medical record and invoice.
-	Cancelled	Appointment no longer happening.
-	No Show	Patient did not attend.

16.3 Key URLs (for reference)

Page	URL
Home / Landing	/clinic-system/public
Login	/clinic-system/public/login
Register clinic	/clinic-system/public/register
Forgot password	/clinic-system/public/forgot-password
Dashboard	/clinic-system/public/dashboard
Staff	/clinic-system/public/staff
Services	/clinic-system/public/services
Patients	/clinic-system/public/patients
Appointments	/clinic-system/public/appointments
Appointment calendar	/clinic-system/public/appointments/calendar
Medical records	/clinic-system/public/records

Page	URL
Invoices	/clinic-system/public/invoices
Inventory	/clinic-system/public/inventory
Suppliers	/clinic-system/public/inventory/suppliers
Reports	/clinic-system/public/reports/billing
Clinic settings	/clinic-system/public/settings
Profile	/clinic-system/public/profile

Your server address may differ. Ask your system administrator for the exact address for your installation.

This document is provided for the authorized users of the Clinic Management System. For support, please contact your system administrator.