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## Clinic management — user guide

A BarmajTek product

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# 1. Introduction

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Clinic Tek is an Arabic-first clinic management system for appointments, patient records, visits, billing and patient communication. This guide walks each role — clinic owner, doctor, receptionist and cashier — through daily tasks, and shows patients how to use the patient app. Print it and keep it at the front desk as a training handbook.

## 2. Getting started

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Staff sign in at your clinic address (for example `demo.localhost` during setup, or your own subdomain in production). Each person has a role that decides what they can see and do. The clinic owner sets everything up; doctors document visits; receptionists manage the schedule and queue; cashiers handle payments. Patients do not need an account — they open a private link the clinic sends them.

A large, light blue rounded rectangle with a dashed border, serving as a placeholder for a screenshot.

Screenshot placeholder — ST-05 · owner

### 3. Clinic setup (owner)

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The owner completes a short setup wizard the first time they sign in. Finish these steps to unlock the schedule and start seeing patients:

- Clinic profile & contact details
- Clinic locations & rooms
- Add your team
- Doctor working hours
- Service catalog
- Insurance companies

Screenshot placeholder — ST-24 · owner

## 4. Reception & scheduling

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### Schedule board

The schedule is your clinic's day at a glance. Book, move and check appointments across all doctors without double-booking.

Screenshot placeholder — ST-07 · receptionist

#### WHAT YOU CAN DO

- Click any empty slot to book an appointment.
- Drag an appointment to a new time to reschedule it.
- If a slot is taken you'll be asked to confirm before double-booking.
- Search a patient by name or phone to jump to their appointment.

Drag-and-drop is the fastest way to reschedule — drop it and confirm.

Switch between day, week and list views from the top bar.

## Reception queue

The queue runs your waiting room: check patients in, move them to the doctor, and complete visits.

Screenshot placeholder — ST-08 · receptionist

### WHAT YOU CAN DO

- Tap Check in when a patient arrives.
- Use Call next to send the first waiting patient to the doctor.
- Mark a patient complete when they leave the doctor.
- Add a walk-in for patients without an appointment.

Wait-time badges turn amber then red so you can spot long waits.

## 5. Clinical workflow

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### My Day

My Day is your personal roster: today's patients with their alerts and last visit, ready to start.

Placeholder for a screenshot of the My Day interface. The text reads: Screenshot placeholder — ST-09 · doctor

#### WHAT YOU CAN DO

- See your next patient with their critical alerts up top.
- Start a visit with one tap to open the clinical note.
- Peek at a patient's history before you begin.

### Active visit

Document one encounter: review alerts, write the clinical note, prescribe, then approve to lock it.

Placeholder for a screenshot of the Active visit interface. The text reads: Screenshot placeholder — ST-16 · doctor

#### WHAT YOU CAN DO

- Write the chief complaint, diagnosis and plan.
- Apply a visit template to pre-fill common notes.
- Add prescription lines with dosage and duration.
- When done, approve to close the visit and finalize the record.
- Amend a locked visit with a required reason (fully audited).

Your note autosaves as a draft while you type.

If someone else edits the same visit you'll see a clear stale-data warning.

## 6. Patients

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### Patients

Find, register and open patient records. Search is instant across name, phone and file number.

Placeholder for a screenshot of the patient search interface, labeled "Screenshot placeholder — ST-10 · receptionist".

#### WHAT YOU CAN DO

- Search by name, phone or national ID.
- Register a new patient — duplicates are flagged automatically.
- Open a patient to see their profile, alerts and timeline.

You can search by the local 07... phone number directly.

### Patient profile

Everything about one patient: critical alerts pinned on top, insurance, files and the full visit timeline.

Placeholder for a screenshot of the patient profile interface, labeled "Screenshot placeholder — ST-12 · doctor".

#### WHAT YOU CAN DO

- Add or edit critical alerts (allergies, conditions).
- Manage the patient's insurance policies for billing.
- Review the visit timeline, newest first.

## Register a patient

Add a new patient record with the essentials — you can always add more later.

Screenshot placeholder — ST-11 · receptionist

### WHAT YOU CAN DO

- Fill in name, phone and gender at minimum.
- If a similar patient exists you'll be warned before saving a duplicate.
- Save to create the record and open the profile.

Enter the local 07... number; it's stored and searchable.

You'll be warned before leaving with unsaved changes.

## 7. Billing & checkout

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### Checkout

The fast lane for taking payment: pick a patient, add services, issue the invoice and record payment.

Screenshot placeholder — ST-17 · cashier

#### WHAT YOU CAN DO

- Search and select the patient to bill.
- Tap service shortcuts to build the invoice.
- Issue the invoice to lock it and get an invoice number.
- Record cash or a CliQ QR payment.

Insurance copay is applied automatically for insured patients.

### Invoice

One invoice: items, payments and the full money lifecycle.

Screenshot placeholder — ST-19 · cashier

#### WHAT YOU CAN DO

- Record a full or partial payment.
- Refund a payment (up to the amount paid).
- Void an issued invoice (owner only).
- Share a public payment link with the patient.

## Billing reports

See collections by method and outstanding balances across the clinic.

Screenshot placeholder — ST-22 · owner

### WHAT YOU CAN DO

- Filter by date range.
- Break down collections by payment method.
- Export the report for your records.

## 8. Patient app (PWA)

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Patients use a lightweight web app (no install needed) opened from a private link the clinic sends by WhatsApp or SMS. From there they can see their place in the queue, view prescriptions, download files, book appointments, and pay invoices by CliQ. A help button on every patient screen answers common questions.

Screenshot placeholder — PW-01 · patient

Screenshot placeholder — PW-02 · patient

Screenshot placeholder — PW-04 · patient

## 9. Settings

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### Staff & invitations

Add doctors and team members, assign roles, and share booking links.

Screenshot placeholder — ST-25 · owner

#### WHAT YOU CAN DO

- Invite a team member by email and role.
- Assign the right role so each person sees what they need.
- Deactivate or reactivate an account any time.
- Copy a doctor's public booking link.

Roles decide permissions — a receptionist can't take payments, a cashier can't see the schedule.

### Working hours

Set each doctor's weekly availability so booking only offers open slots.

Screenshot placeholder — ST-26 · owner

#### WHAT YOU CAN DO

- Turn on the days a doctor works and set start/end times.
- Use a preset (e.g. Sat-Thu 9-5) to fill the week in one tap.
- Save to apply the schedule.

Friday is off by default for the Jordan work week — change it if you open Fridays.

## Locations & rooms

Manage branches and the rooms patients are seen in.

Screenshot placeholder — ST-29 · owner

### WHAT YOU CAN DO

- Add a branch with its city or address.
- Add at least one active room per branch.
- Save to make rooms available for booking.

## 10. Troubleshooting & FAQ

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If something is not working: check your internet connection, refresh the page, and make sure you are signed in with the right role. Payments and schedule updates appear in real time — if they do not, refresh. For anything you cannot resolve, contact your clinic administrator or Clinic Tek support.

How do I reschedule an appointment?

Open the Schedule and drag the appointment card to a new time, then confirm. You can also open the appointment and pick a new slot.

How do I refund a payment?

Open the invoice, find the payment, and choose Refund. You can refund up to the amount paid; only owners and cashiers can refund.

How do reminders reach patients?

Connect WhatsApp in Settings → Integrations. Reminders and confirmations are then sent from your clinic's own number.

Why can't a receptionist take payments?

Each role sees only what it needs. Receptionists handle booking and check-in; cashiers and owners handle money. Change roles in Settings → Staff.

Can I print a manual to train staff?

Yes — download the Arabic or English user guide (PDF) from this panel and print it as a clinic SOP.

## Appendix A — Roles & permissions

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Each role sees only what it needs. This keeps the app simple and safe.

<b>owner</b>	Clinic owner — full administration: staff, settings, schedule and money. Cannot edit or approve clinical visit notes.
<b>doctor</b>	Doctor — clinical work: My Day roster, visit notes, prescriptions, approvals and visit templates.
<b>receptionist</b>	Receptionist — front desk: booking, check-in, the queue and patient registration. Cannot take payments.
<b>cashier</b>	Cashier — billing only: checkout, invoices, payments and refunds. Cannot see the schedule or queue.

## Appendix B – Glossary

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<b>CliQ</b>	Jordan's instant bank transfer system, used for QR and transfer payments.
<b>Queue</b>	The live waiting room: expected, waiting, and with-the-doctor patients.
<b>Visit</b>	One clinical encounter — its note, diagnosis, plan and prescription.
<b>Draft / Approve</b>	A visit is a draft while being written; approving locks it into the record.
<b>Amendment</b>	An audited change to an approved visit, with a required reason.
<b>Copay</b>	The patient's share of a bill when insurance covers part of it.
<b>Tenant / Subdomain</b>	Your clinic's private space and web address in the system.
<b>PWA</b>	The patient web app that works on any phone without installing.