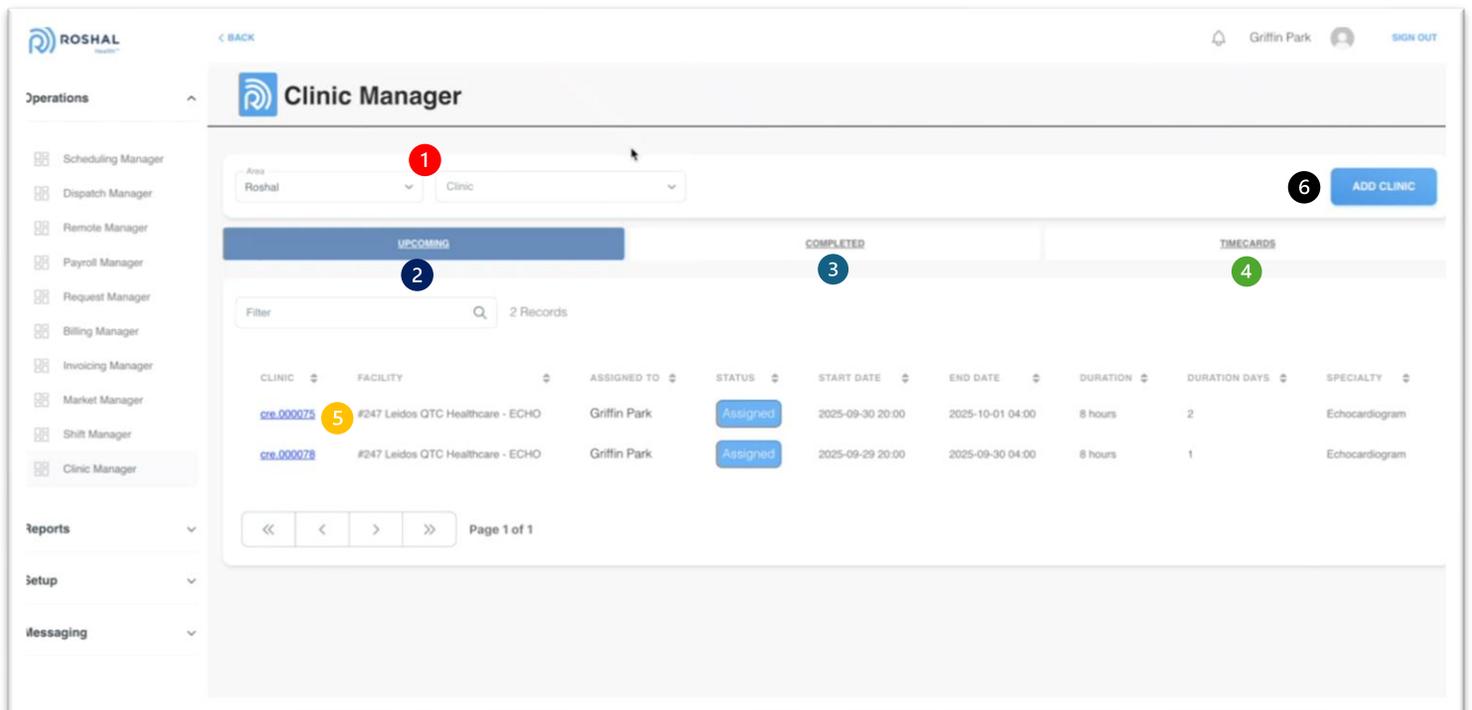


Clinic Manager & Clinic View - Admin Portal (12/19/25)

The **Clinic Manager** and **Clinic View** are your central hubs for managing clinic-related activities. From here you can create, edit, view, assign, and manage all clinic-related information.

Clinic Manager

- View all current and completed clinics with full details.
- 1** • **Filter** by area and clinic to narrow the list.
- Tabs:
 - 2** ○ **Upcoming** – Clinics with the nearest start dates.
 - 3** ○ **Completed** – Clinics whose end date is in the past.
 - 4** ○ **Timecard** – Same layout as Completed but with additional timecard details.
- 5** • **Click any clinic** to open its **Clinic View** (most work happens there).
- 6** • Click the blue **“Add Clinic”** button (top-right) to create a new clinic.



The screenshot shows the 'Clinic Manager' interface in the Roshal Health Admin Portal. The interface includes a sidebar with navigation options such as Scheduling Manager, Dispatch Manager, Remote Manager, Payroll Manager, Request Manager, Billing Manager, Invoicing Manager, Market Manager, Shift Manager, and Clinic Manager. The main content area is titled 'Clinic Manager' and features a filter section with 'Area' (Roshal) and 'Clinic' dropdown menus. Below the filter are three tabs: 'UPCOMING' (selected), 'COMPLETED', and 'TIMECARDS'. A table displays two clinic records with columns for CLINIC, FACILITY, ASSIGNED TO, STATUS, START DATE, END DATE, DURATION, DURATION DAYS, and SPECIALTY. A blue 'ADD CLINIC' button is located in the top right corner. Numbered callouts (1-6) highlight key UI elements as described in the text.

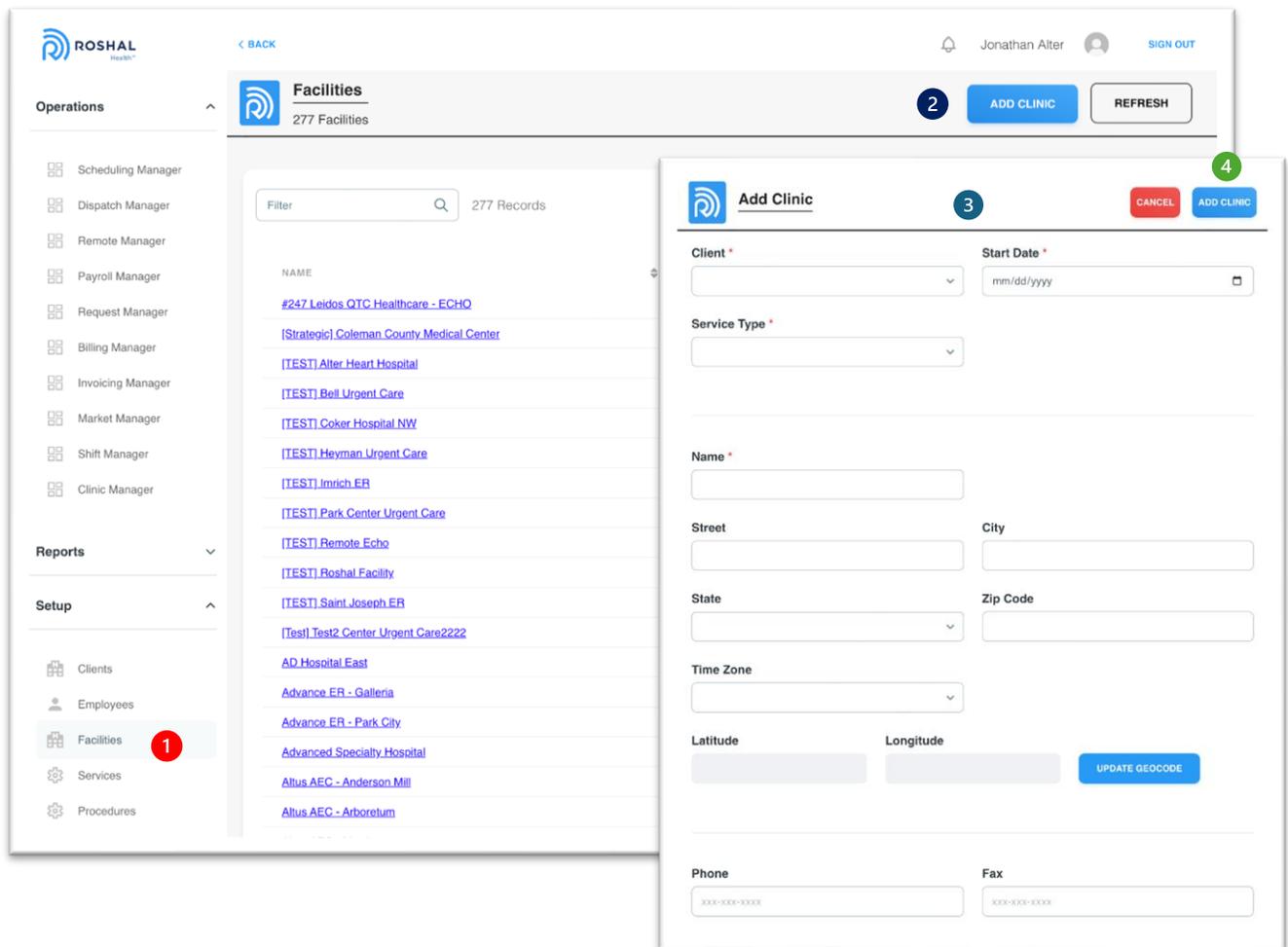
CLINIC	FACILITY	ASSIGNED TO	STATUS	START DATE	END DATE	DURATION	DURATION DAYS	SPECIALTY
cre_000075	#247 Leidos OTC Healthcare - ECHO	Griffin Park	Assigned	2025-09-30 20:00	2025-10-01 04:00	8 hours	2	Echocardiogram
cre_000078	#247 Leidos OTC Healthcare - ECHO	Griffin Park	Assigned	2025-09-29 20:00	2025-09-30 04:00	8 hours	1	Echocardiogram

Create a Clinic – Facility (Facilities Screen) (ONLY IF NOT CREATED YET)

- Create a new clinic facility and add it to the facility list to enable setting up future clinics.

Steps

1. Under **Setup**, click on **Facilities**
2. Click **“Add Clinic”** in the top right corner
3. Fill out all information related to the **Clinic – Facility** (Client, start date, service types, clinic contact information, address, phone, etc)
4. **Review** all details → Click the blue **“Add Clinic”** button.



The screenshot displays the Roshal Health interface. On the left, the 'Setup' menu is expanded, and 'Facilities' is highlighted with a red circle '1'. The main area shows the 'Facilities' screen with a list of 277 records. A blue circle '2' highlights the 'ADD CLINIC' button in the top right corner. An 'Add Clinic' modal form is overlaid on the right, with a green circle '4' highlighting the 'ADD CLINIC' button in its top right corner. A blue circle '3' highlights the 'ADD CLINIC' button in the top right corner of the modal form. The modal form contains the following fields:

- Client ***: A dropdown menu.
- Start Date ***: A date input field with a calendar icon and the format 'mm/dd/yyyy'.
- Service Type ***: A dropdown menu.
- Name ***: A text input field.
- Street**: A text input field.
- City**: A text input field.
- State**: A dropdown menu.
- Zip Code**: A text input field.
- Time Zone**: A dropdown menu.
- Latitude**: A text input field.
- Longitude**: A text input field.
- UPDATE GEOCODE**: A blue button.
- Phone**: A text input field with a placeholder 'xxx-xxx-xxxx'.
- Fax**: A text input field with a placeholder 'xxx-xxx-xxxx'.

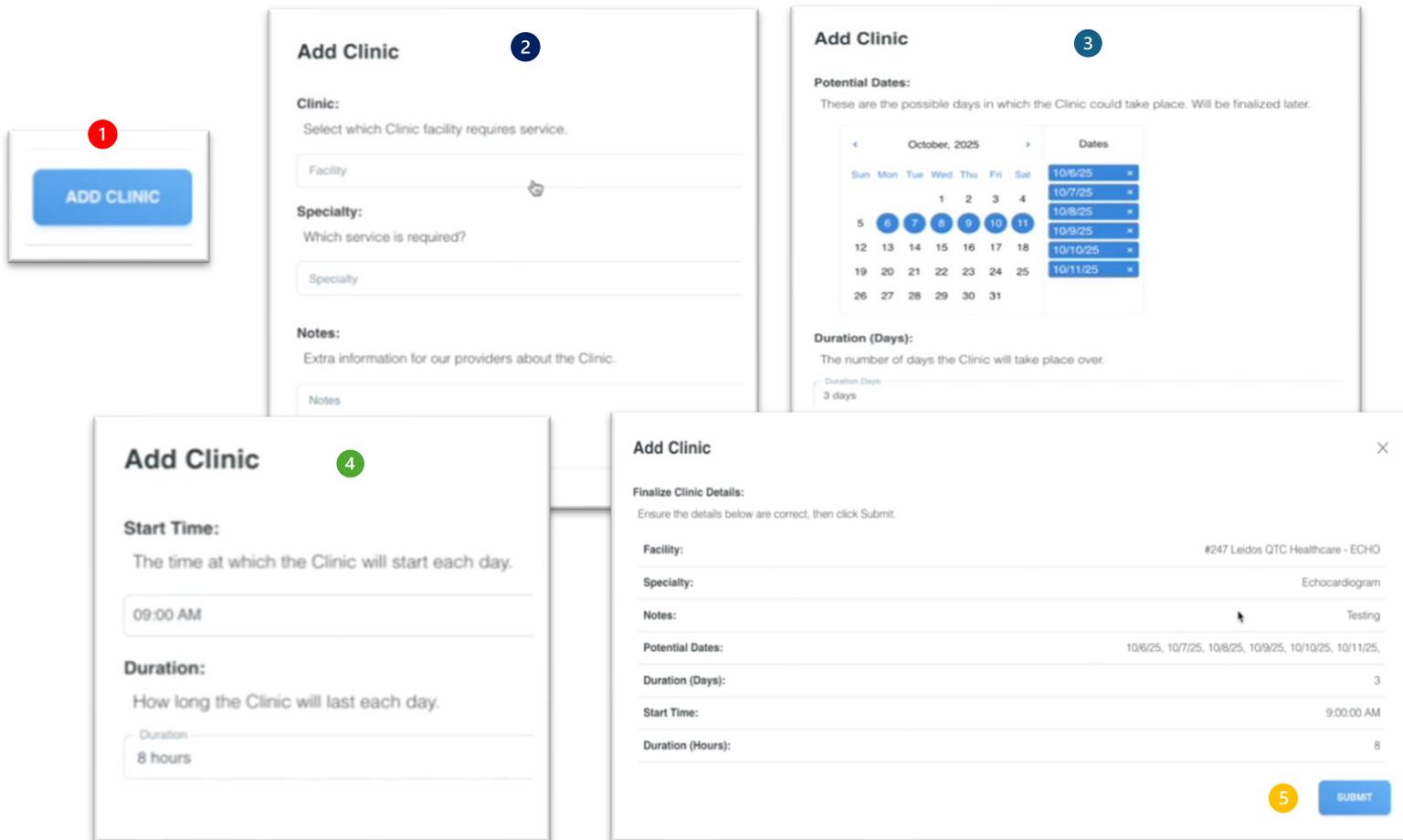
Add a Clinic (Clinic Manager Screen)

- Admins create clinics on behalf of clients. (A client portal will be available in the future)

Steps

1. From the **Clinic Manager Screen**, click **“Add Clinic”**
2. **Enter** the clinic – facility (if clinic facility doesn’t exist follow along in next section), **select Specialty**, and **add Notes** if needed → **Click Next** - bottom right corner.
3. **Add Potential Dates** (possible service dates) and **set Duration** (total number of days across the clinic; **max 7 days**) → **Click Next** - bottom right corner.
4. **Set Start Time** (same start time for each day) and **Daily Length** (same duration each day) → **Click Next** - bottom right corner.
5. **Review** all details → Click the blue **“Submit”** button.

Note: From the Clinic View you can edit any info **except** the selected **facility** and **specialty**.



1 ADD CLINIC

2 Add Clinic

Clinic:
Select which Clinic facility requires service.

Facility

Specialty:
Which service is required?

Specialty

Notes:
Extra information for our providers about the Clinic.

Notes

3 Add Clinic

Potential Dates:
These are the possible days in which the Clinic could take place. Will be finalized later.

October, 2025

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

Duration (Days):
The number of days the Clinic will take place over.

Duration Days
3 days

4 Add Clinic

Start Time:
The time at which the Clinic will start each day.

09:00 AM

Duration:
How long the Clinic will last each day.

Duration
8 hours

5 Add Clinic

Finalize Clinic Details:
Ensure the details below are correct, then click Submit.

Facility: #247 Leidos QTC Healthcare - ECHO

Specialty: Echocardiogram

Notes: Testing

Potential Dates: 10/6/25, 10/7/25, 10/8/25, 10/9/25, 10/10/25, 10/11/25

Duration (Days): 3

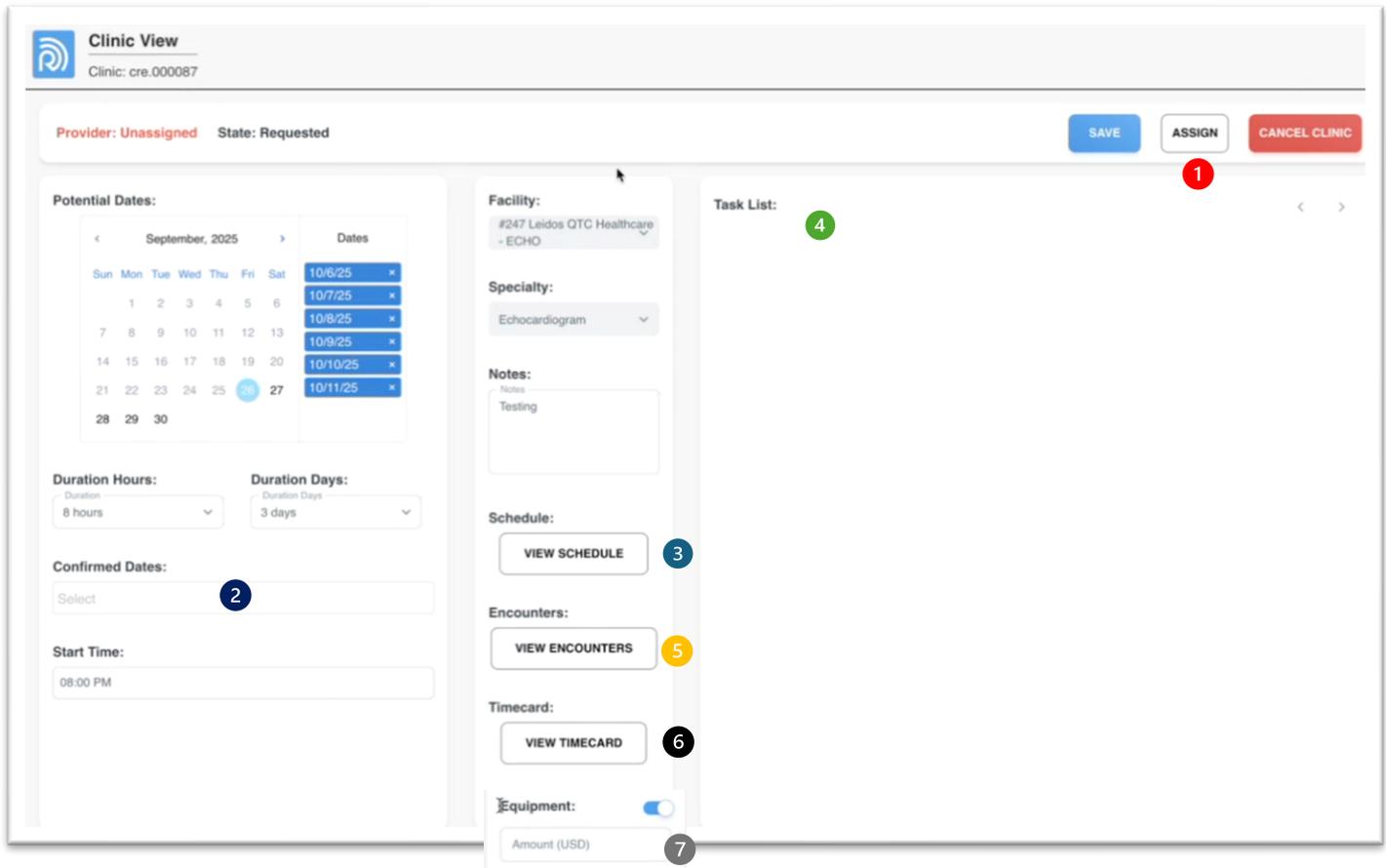
Start Time: 9:00:00 AM

Duration (Hours): 8

SUBMIT

Clinic View (General)

- When modifying anything on this screen, click the blue **“Save”** button (top-right). If you try to leave with unsaved changes, you’ll be prompted to save.
- Beyond the creation details, Clinic View adds:
 - 1 ○ Ability to **draft assign (setup/plan), full assign** and **send bulletins to providers**.
 - 2 ○ Ability to **confirm service dates** based on provider responses.
 - 3 ○ Ability to **modify schedules** and **add provider entries**.
 - 4 ○ Ability to **modify pre & post clinic tasks** and **upload attachments (only visible upon fully assigning a provider)**.
 - 5 ○ Ability to **view all encounters performed** throughout the duration of the clinic.
 - 6 ○ Ability to **view or modify timecards** based on the entries performed by the provider.
- 7 • Side note: In the bottom-middle section, **toggle “Equipment”** to **enter the dollar amount** for equipment rentals (Heartbeat Health specific) → **Click Save**.

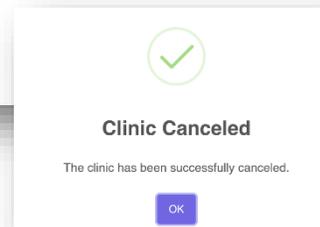
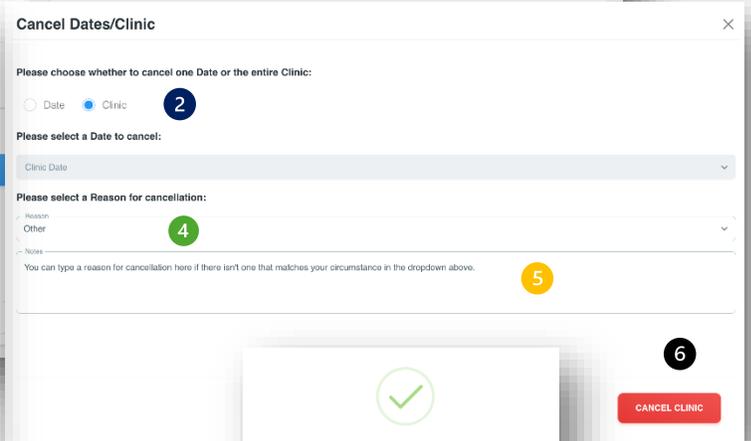
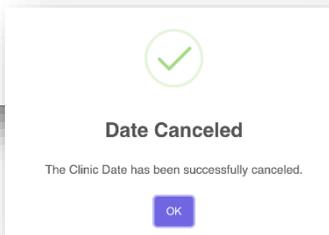
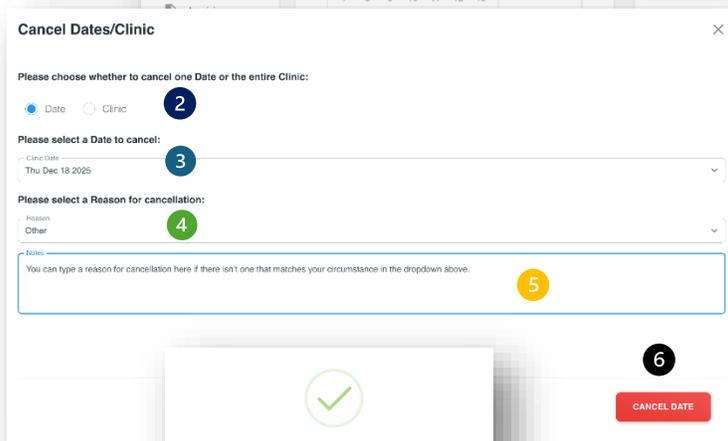
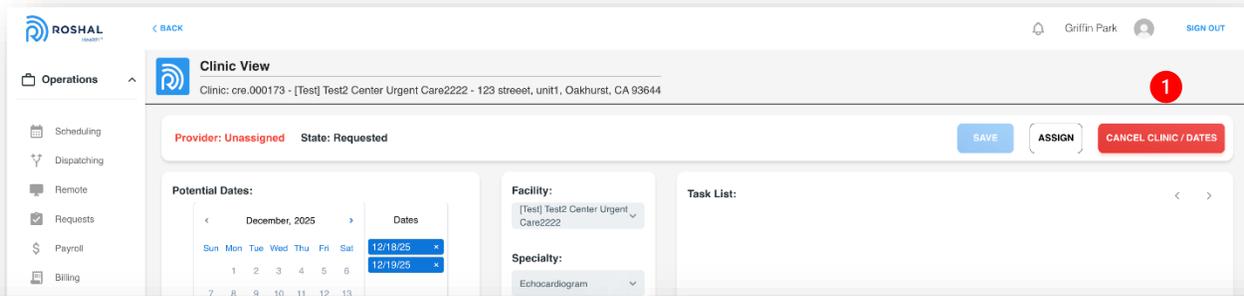


The screenshot shows the 'Clinic View' interface for clinic ID 'cre.000087'. At the top right, there are three buttons: 'SAVE' (blue), 'ASSIGN' (white), and 'CANCEL CLINIC' (red). Below these, the status is 'Provider: Unassigned' and 'State: Requested'. The interface is divided into several sections:

- Potential Dates:** A calendar for September 2025 with a 'Dates' column listing dates from 10/6/25 to 10/11/25. A blue circle '2' is next to the 'Confirmed Dates' field below.
- Duration:** 'Duration Hours' is set to 8 hours and 'Duration Days' is set to 3 days.
- Facility:** '#247 Leidos QTC Healthcare - ECHO'.
- Specialty:** 'Echocardiogram'.
- Notes:** A text area containing 'Testing'.
- Schedule:** A 'VIEW SCHEDULE' button with a blue circle '3' next to it.
- Encounters:** A 'VIEW ENCOUNTERS' button with a yellow circle '5' next to it.
- Timecard:** A 'VIEW TIMECARD' button with a black circle '6' next to it.
- Equipment:** A toggle switch is turned on, and an 'Amount (USD)' field is visible below it, with a blue circle '7' next to the field.
- Task List:** A section on the right with a green circle '4' next to it.
- Buttons:** A red circle '1' is next to the 'ASSIGN' button.

Clinic View (General) – Cancelling a Date/Clinic

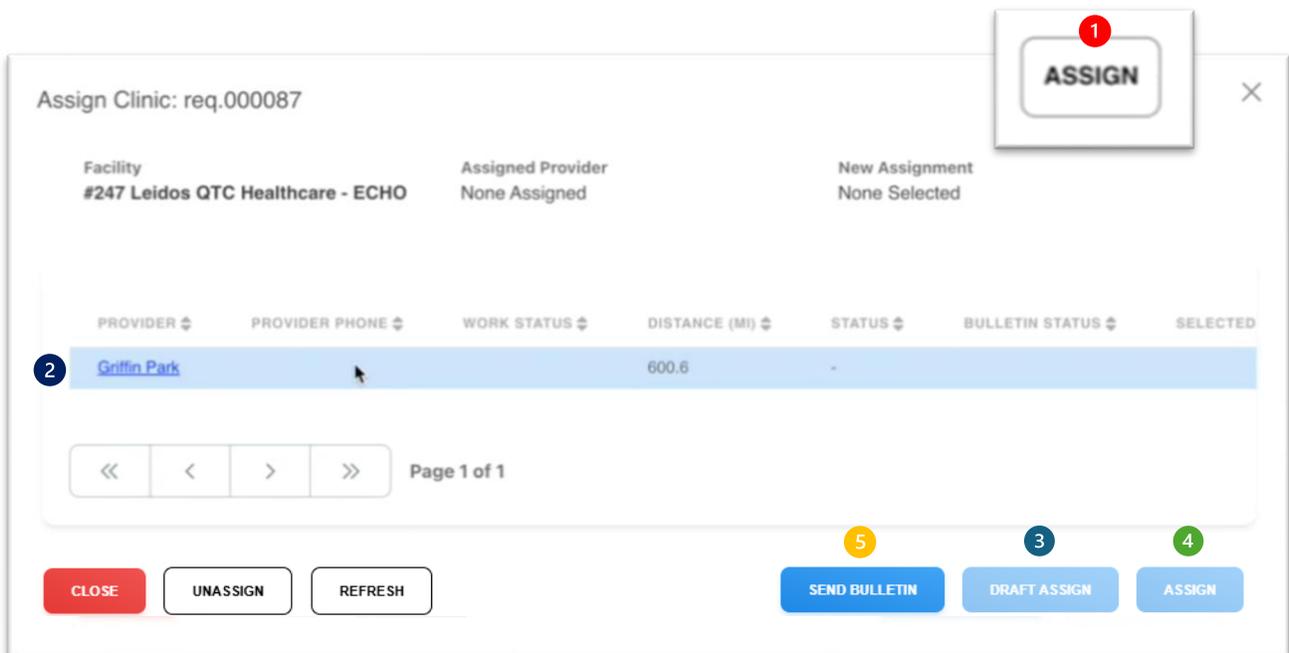
- 1 • Click the **Cancel Clinic/Dates** button while viewing a clinic.
- 2 ○ Choose whether to cancel a **specific date** or the **entire clinic**
 - If cancelling a **specific date**:
 - 3 ▪ Select the **date** from the drop-down menu.
 - 4 ○ Select a **cancellation reason**
 - 5 ▪ If **Other** is selected, enter a required note explaining the reason.
- 6 ○ Select **Cancel** once completed



Draft Assigning Providers (Plan Before Full Assignment)

Use **Draft Assign** to plan a provider's schedule without notifying them.

1. Click **"Assign"** (top-right).
2. Review the list of providers **eligible** for this facility.
3. **Select a provider** → Click **"Draft Assign."**
 - The provider is held in **Draft** for this facility (no notification sent).
 - You can continue editing the clinic and planning allocations.
4. If you know the provider performing at the clinic in advance, use the main **Assign** button.
5. Click **"Send Bulletin"** so providers can view and request this clinic listing.
 - Providers will select their eligible dates; their choices and status appear on the Provider Assignment screen.



Assign Clinic: req.000087

Facility: #247 Leidos QTC Healthcare - ECHO Assigned Provider: None Assigned New Assignment: None Selected

PROVIDER	PROVIDER PHONE	WORK STATUS	DISTANCE (MI)	STATUS	BULLETIN STATUS	SELECTED
Griffin Park			600.6	-		

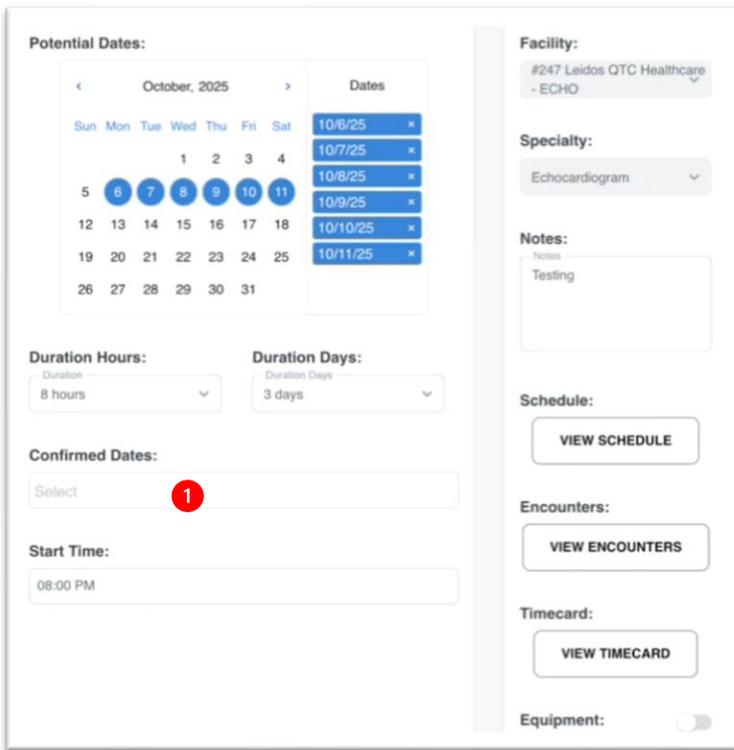
Page 1 of 1

Buttons: CLOSE, UNASSIGN, REFRESH, SEND BULLETIN, DRAFT ASSIGN, ASSIGN

Callouts: 1 (ASSIGN button), 2 (Griffin Park row), 3 (DRAFT ASSIGN button), 4 (ASSIGN button), 5 (SEND BULLETIN button)

Confirmed Dates (Pre-Full Assignment)

1. From provider responses, **select the Confirmed Dates** dropdown.
2. Select from the list of dates and choose which days the service will be performed on → **Click Save**.
3. After saving, the **“View Schedule” button turns blue** → **Click “View Schedule”** to begin creating entries for each confirmed date.



Potential Dates: October, 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Dates
							10/6/25 x
							10/7/25 x
							10/8/25 x
							10/9/25 x
							10/10/25 x
							10/11/25 x

Duration Hours: 8 hours

Duration Days: 3 days

Confirmed Dates: Select **1**

Start Time: 08:00 PM

Facility: #247 Leidos QTC Healthcare - ECHO

Specialty: Echocardiogram

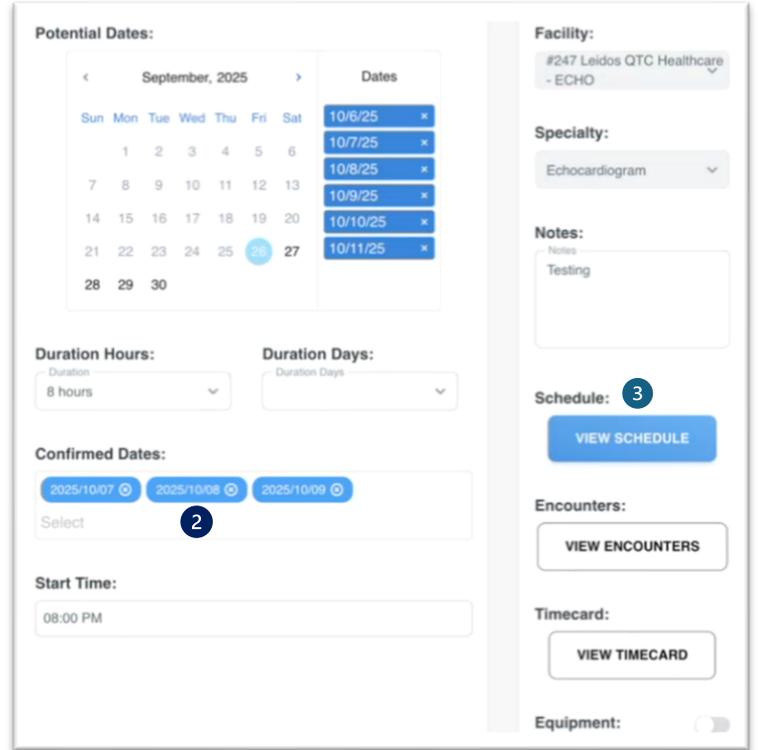
Notes: Testing

Schedule: VIEW SCHEDULE

Encounters: VIEW ENCOUNTERS

Timecard: VIEW TIMECARD

Equipment:



Potential Dates: September, 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Dates
							10/6/25 x
							10/7/25 x
							10/8/25 x
							10/9/25 x
							10/10/25 x
							10/11/25 x

Duration Hours: 8 hours

Duration Days:

Confirmed Dates: 2025/10/07 2025/10/08 2025/10/09 **2**

Start Time: 08:00 PM

Facility: #247 Leidos QTC Healthcare - ECHO

Specialty: Echocardiogram

Notes: Testing

Schedule: **VIEW SCHEDULE** **3**

Encounters: VIEW ENCOUNTERS

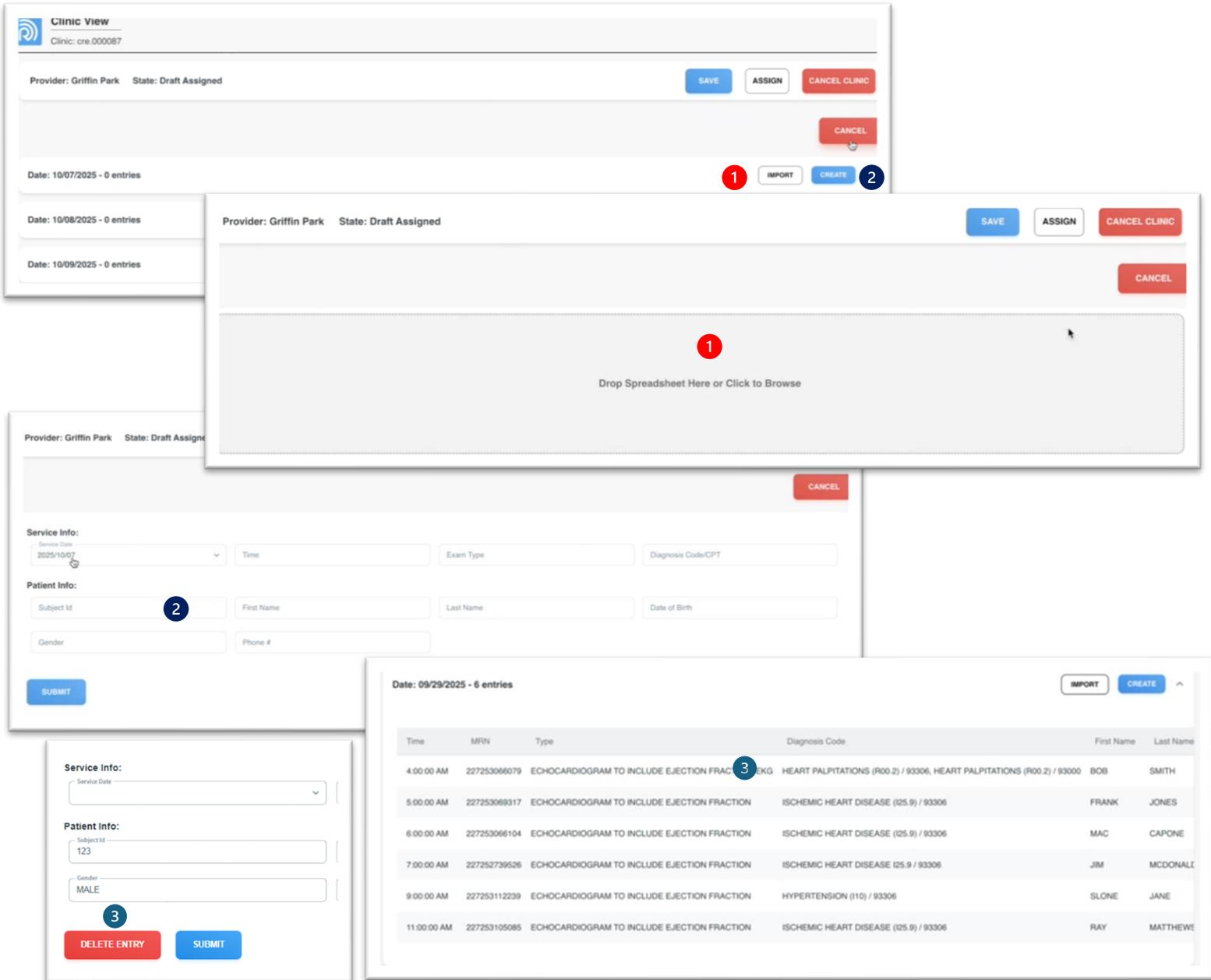
Timecard: VIEW TIMECARD

Equipment:

View Schedule (Pre-Full Assignment)

This tells the provider **who** they're serving, **what** they're performing, and **when**.

- 1 • **Import an Excel** (multiple entries for a specific date; use the example templates Nancy provided - [clinicScheduleExample.xlsx](#)), **or**
- 2 • **Create schedule entries manually.**
- 3 • To make changes later, **click an entry to edit** it or **delete** it entirely.



The screenshot displays the 'Clinic View' interface for 'Clinic: cre.000087' and 'Provider: Griffin Park' (State: Draft Assigned). It shows a list of dates with '0 entries' and buttons for 'SAVE', 'ASSIGN', 'CANCEL CLINIC', 'CANCEL', 'IMPORT', and 'CREATE'. A large area is labeled 'Drop Spreadsheet Here or Click to Browse'.

The 'Service Info' section includes fields for 'Service Date' (2025/10/07), 'Time', 'Exam Type', and 'Diagnosis Code/CPT'. The 'Patient Info' section includes 'Subject Id' (123), 'First Name', 'Last Name', 'Date of Birth', 'Gender' (MALE), and 'Phone #'. A 'SUBMIT' button is present.

The 'Date: 09/29/2025 - 6 entries' view shows a table of scheduled appointments:

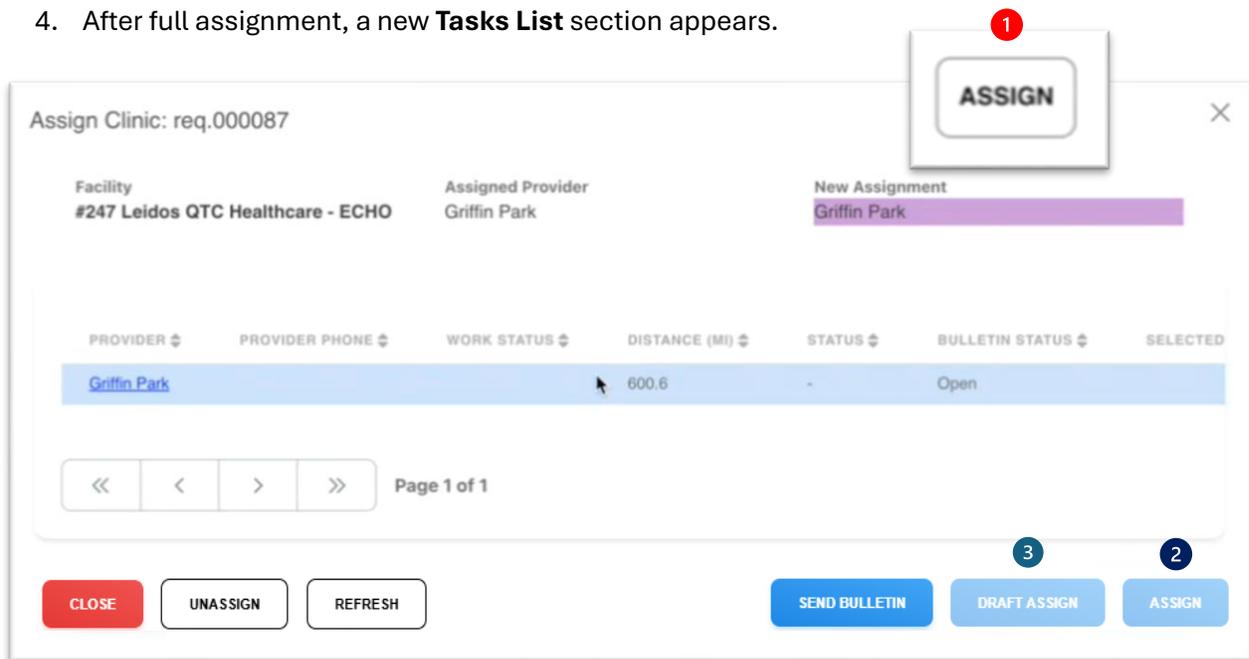
Time	MPN	Type	Diagnosis Code	First Name	Last Name
4:00:00 AM	227253066079	ECHOCARDIOGRAM TO INCLUDE EJECTION FRACTION	HEART PALPITATIONS (R00.2) / 93306, HEART PALPITATIONS (R00.2) / 93000	BOB	SMITH
5:00:00 AM	227253069317	ECHOCARDIOGRAM TO INCLUDE EJECTION FRACTION	ISCHEMIC HEART DISEASE (I25.9) / 93306	FRANK	JONES
6:00:00 AM	227253066104	ECHOCARDIOGRAM TO INCLUDE EJECTION FRACTION	ISCHEMIC HEART DISEASE (I25.9) / 93306	MAC	CAPONE
7:00:00 AM	227252739526	ECHOCARDIOGRAM TO INCLUDE EJECTION FRACTION	ISCHEMIC HEART DISEASE (I25.9) / 93306	JIM	MCDONALI
9:00:00 AM	227253112239	ECHOCARDIOGRAM TO INCLUDE EJECTION FRACTION	HYPERTENSION (I10) / 93306	SLONE	JANE
11:00:00 AM	227253105085	ECHOCARDIOGRAM TO INCLUDE EJECTION FRACTION	ISCHEMIC HEART DISEASE (I25.9) / 93306	RAY	MATTHEW

Buttons for 'DELETE ENTRY' and 'SUBMIT' are shown at the bottom of the service info section.

Full Provider Assignment

Use this when you're ready to finalize who is handling the clinic (if not done so already).

1. Click "Assign."
2. If assigning the same draft provider: **Select their name** → Click the blue "Assign" button (bottom-right).
3. If assigning a different provider: **Select the new provider** → Click "Draft Assign" (if not finalized yet) → Click the blue "Assign" button to finalize.
4. After full assignment, a new **Tasks List** section appears.



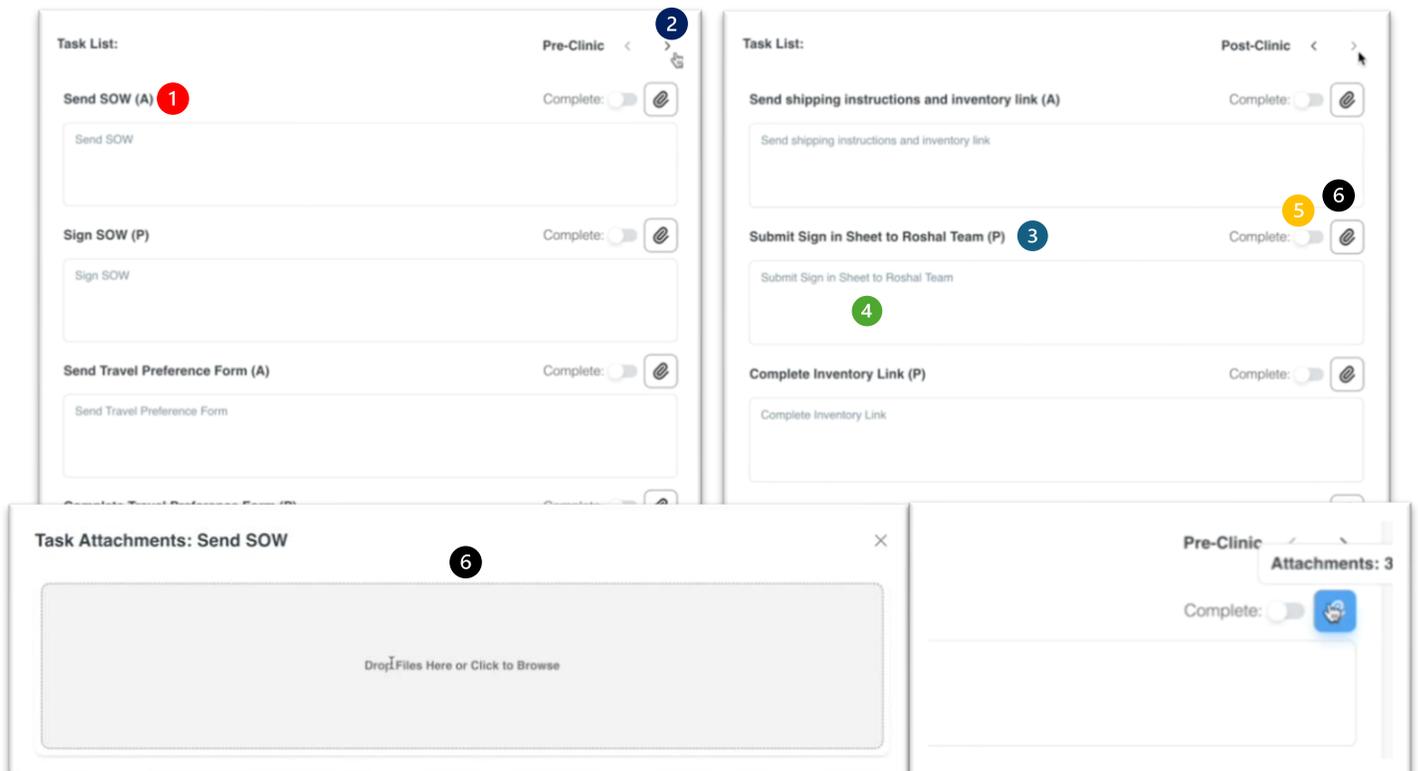
The screenshot shows the 'Assign Clinic: req.000087' interface. At the top right, a red circle '1' points to a button labeled 'ASSIGN'. Below this, the 'Assigned Provider' is 'Griffin Park' and the 'New Assignment' is also 'Griffin Park'. A table lists providers with columns: PROVIDER, PROVIDER PHONE, WORK STATUS, DISTANCE (MI), STATUS, BULLETIN STATUS, and SELECTED. The 'Griffin Park' provider is highlighted in blue. At the bottom right, a blue circle '2' points to the 'ASSIGN' button, and a blue circle '3' points to the 'DRAFT ASSIGN' button. At the bottom left, there are buttons for 'CLOSE', 'UNASSIGN', and 'REFRESH'. At the bottom center, there are buttons for 'SEND BULLETIN', 'DRAFT ASSIGN', and 'ASSIGN'. The page is labeled 'Page 1 of 1'.

Task List (Pre-Clinic & Post-Clinic)

- Tasks may be marked **A** (Admin) or **P** (Provider). **Admins can modify both Admin and Provider tasks**; providers can modify **only their own** tasks.
 - **Pre-Clinic** tasks must be completed **before** the clinic starts; **Post-Clinic** tasks must be completed **after** the clinic ends.
- Use the **small arrow** (top-right of the section) to **switch between Pre and Post** task lists.

Completing Tasks

1. **Select a task.**
2. **Add Notes** (if needed).
3. **Toggle “Completed.”**
4. **Click the Attachment icon to upload files** (up to **10** at once).
 - After upload, the icon turns **blue**.
 - **Click the Attachment icon** again to **preview** a specific file.
5. **Click Save** to persist your updates.



The screenshot illustrates the Roshal Health Task List interface. It is divided into two main sections: Pre-Clinic and Post-Clinic. The Pre-Clinic section lists tasks such as 'Send SOW (A)', 'Sign SOW (P)', and 'Send Travel Preference Form (A)'. The Post-Clinic section lists tasks such as 'Send shipping instructions and inventory link (A)', 'Submit Sign in Sheet to Roshal Team (P)', and 'Complete Inventory Link (P)'. Each task entry includes a 'Complete' toggle and an attachment icon. A modal window titled 'Task Attachments: Send SOW' is shown in the foreground, featuring a large grey area with the text 'Drop Files Here or Click to Browse'. A task completion toggle is also shown in the bottom right corner, with the text 'Pre-Clinic Attachments: 3' and 'Complete: [toggle] [attachment icon]'.

Encounter

- 1 • Click **View Encounters** to view the full list of all encounters logged for the clinic.
 - Populated by the **Provider**; visible here for reference only.
- 2 • View **MRN, Patients Name, Date Procedures Performed, and Notes** by day.

View Encounters ✕

MRN	Procedures	Provider Notes
227253069317	Procedure Name	Notes
	Abdomen	
227253066104	Abdomen limited	
	Procedure Name	Notes
	Abdomen limited	
	Abdominal Doppler	
227252739526	Aorta	
	Procedure Name	Notes
227253112239	BLEAD	
	Procedure Name	Notes
227253066079	Breast Biopsy	
	Procedure Name	Notes
227253066079	Abdomen	
	Procedure Name	Notes

2

Encounters:

VIEW ENCOUNTERS

Timecard

Tracks the provider's **travel start/end** (pre- and post-clinic), **clinic start/end** for each day, and **breaks**—used for **payroll**.

1. Click **View Timecard** to view all timecard related information.
 - This typically **auto-fills** when the provider updates times in their app.
 - If manual edits are needed (Admin):
 2. 1. **Click the plus icon to add** a timecard event or **click the delete icon to remove** one.
 3. 2. **Set the Type** (what kind of event it is) and **select the Timeframe**.
 4. 3. **Add Notes** (optional).
 5. 4. **Click “Save Changes”** (bottom-right).

