FLUID ERP · USER MANUAL

FLUID Hospital

Booked once. Billed, recalled, reported.

Appointments from the patient app, the waiting room, consultations and SOAP notes, ADDS observations, the results in-tray and recalls, the bed board, bulk-bill claims and the ledger — each captured once.

Patient-app bookings · Waiting room · Consult & SOAP · ADDS early warning · Results & recalls · Bulk-bill claims



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1 About this manual

This manual explains how to run a general practice and day hospital on FLUID Hospital: booking appointments from the patient app, running the waiting room, starting consultations and writing SOAP notes, recording observations with the ADDS early-warning score, reviewing results and setting recalls, admitting and discharging day patients, generating and lodging bulk-bill claims, and reading the dashboards, reports and matching screens. The worked examples follow Riverside Family Surgery on 19 August 2026.

Who it is for

READER	READ THESE CHAPTERS
Reception	3, 4, 6 (recalls), 10
Doctors and nurses	3, 5, 6
Ward clerk	7
Billing	8, 9, 10, 11
Practice manager	9, 10, 12
Patients (patient app)	4 (requests), 6 (My Reminders)
Administrators	3, 12, 13, Appendix A

Conventions

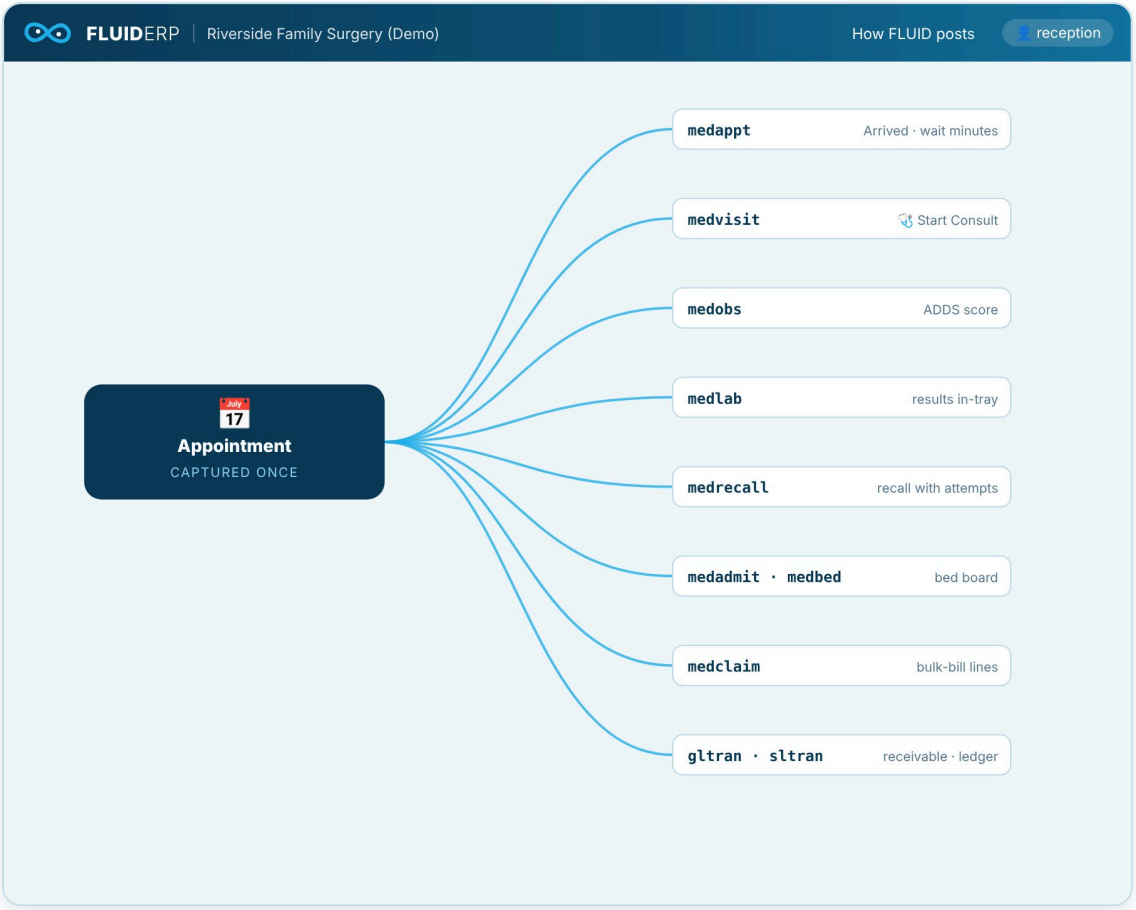
YOU SEE	MEANS
Bold names such as **Shifts**	A tile on the launcher, a screen, a tab or a field label, exactly as it appears in FLUID.
A button with an emoji, e.g. 🚚 **Post the Shift**	A posting button. Posting buttons are aqua; they write to other tables. 💾 **Save** is navy and saves only the record in front of you.
A field marked ƒ	A calculated field. You never type it — the calculation engine fills it from other fields or other tables, and keeps it right when they change.
`mneshift`	The name of the underlying table (collection). Useful when talking to your administrator or reading a report definition.
SH000006, MO000001 …	Record numbers. They are issued automatically by counters and carried on every row a button writes, so you can trace any figure back to the record that caused it.

ABOUT THE EXAMPLES

Patients, appointments, visits, observations, results, recalls, admissions and claim MBC00001 follow the Stage 62 Riverside story. MBS benefits and dashboard histories are illustrative. Screenshots come from the FLUID Hospital demonstration film.

2 How FLUID works: capture once, post everywhere

The appointment is captured once. Start Consult makes the visit from it; the visit sets the recall; the result's action writes the next recall; admission and discharge move the bed; the claim reads the unclaimed visits; the ledger takes the claim. Nobody retypes the app's request, the item number or the recall list.



One appointment fans out to the visit, observations, results, recalls, the bed board, the claim and the ledger.

Three kinds of action

ACTION	WHAT HAPPENS	TYPICAL BUTTON
Capture	A person (or a feed, a file, a phone app) records something that happened — once. It is saved on its own table and gets a number.	💾 Save · a form on the phone · a file import or feed
Post	A posting button reads the captured record and writes every row that follows from it — ledgers, stock, other documents, stamps — each carrying the source number. Most posting buttons are one-way: the record is marked posted and cannot be posted again.	📅 Book Appointment · 🩺 Start Consult · 🏛️ Lodge

ACTION	WHAT HAPPENS	TYPICAL BUTTON
Derive	Calculations keep totals, balances, KPIs, flags and due dates right. Dashboards and reports read those rows directly; nothing is copied into a spreadsheet.	none — fields marked ƒ, dashboards, reports

Rules you can rely on

1. **Nothing is typed twice.** If a number exists in one record, every other table that needs it receives it from the button, not from a person.
2. **A posted record is sealed.** Pressing a posting button a second time writes nothing and says so. To change a posted figure you raise a correcting document (a credit note, a reversal, a correction) — which is itself captured once and posted.
3. **Every row is traceable.** Each row a button writes carries the reference of the record that caused it (for example `ref = MBC00001`). Drill from any dashboard figure to the rows behind it and from there to the source record.
4. **Rules are enforced at the server.** Approvals, segregation of duties, embargoes, seals and signatures are checked by the gateway for every user, not just on screen.
5. **Imports are idempotent.** Files and feeds are keyed so that sending the same data again updates rows instead of duplicating them.

READ A POSTING PANEL

When you press a posting button, a panel lists every table it is writing to, one tick at a time, and ends with a green line such as “Posted — 5 writes to 5 tables from one capture”. That list is exactly what the button changed; the receiving tables show the same reference number.

3 Getting started

Signing in

Open the FLUID app (Windows, Android) or the browser client and sign in with the user name and password your administrator gave you. Each sign-in belongs to a group; the group decides which tiles you see and which fields and buttons you may use.

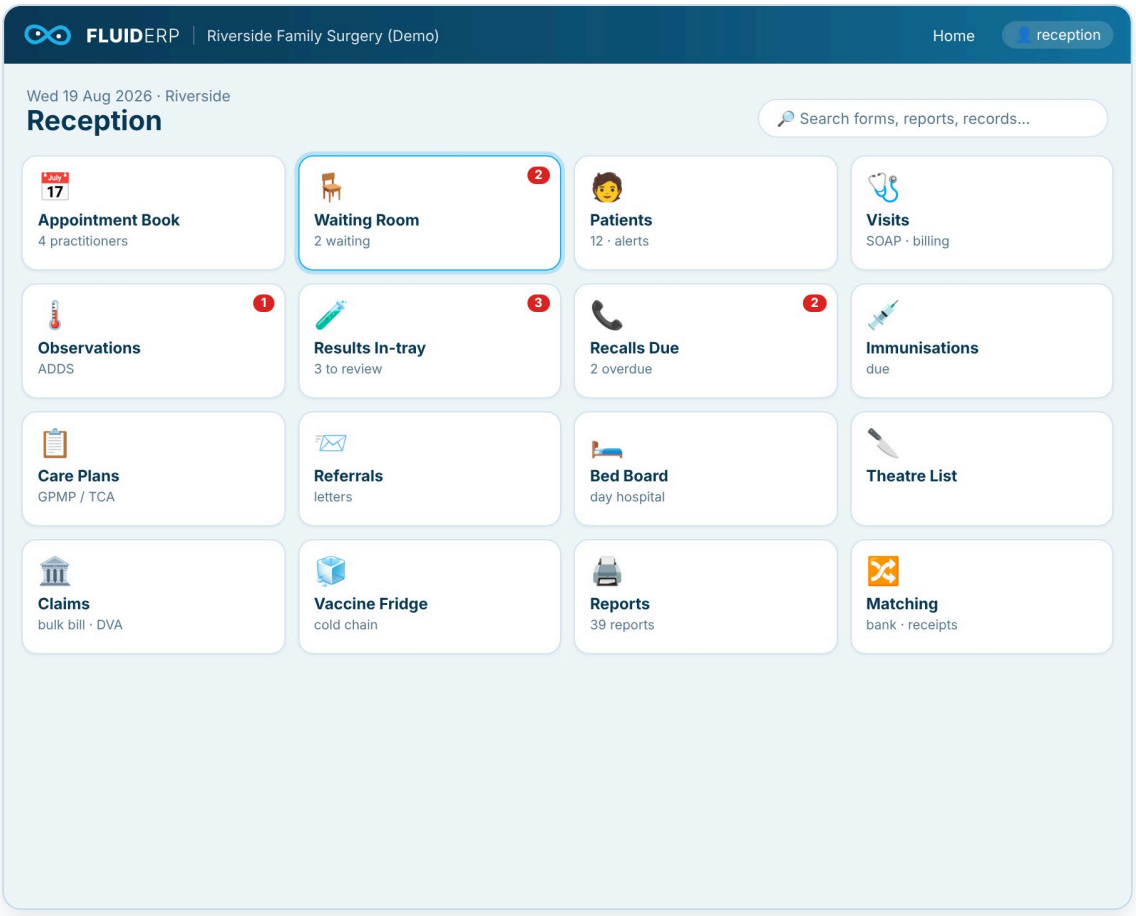
SIGN-IN	GROUP / DESK	USES FLUID TO ...
practice_manager	Practice manager	Everything clinical-administrative; dashboards
reception	Reception	In-tray, appointment book, waiting room, recalls
clinician	Doctor / nurse	Visits, SOAP, observations, results, referrals
ward_clerk	Ward clerk	Admissions, bed board, theatre list, discharge
billing	Billing	Claims, private invoices, payments, matching
ops.coordinator	Operations	Vaccine fridge, stock, rosters
liam.patterson@example.com	Patient (patient app)	Request appointments, My Appointments, My Reminders

DEMO SIGN-INS

In the demo package staff passwords are the same as the user name; the patient-app login uses patient123. Change every password at go-live.

The launcher

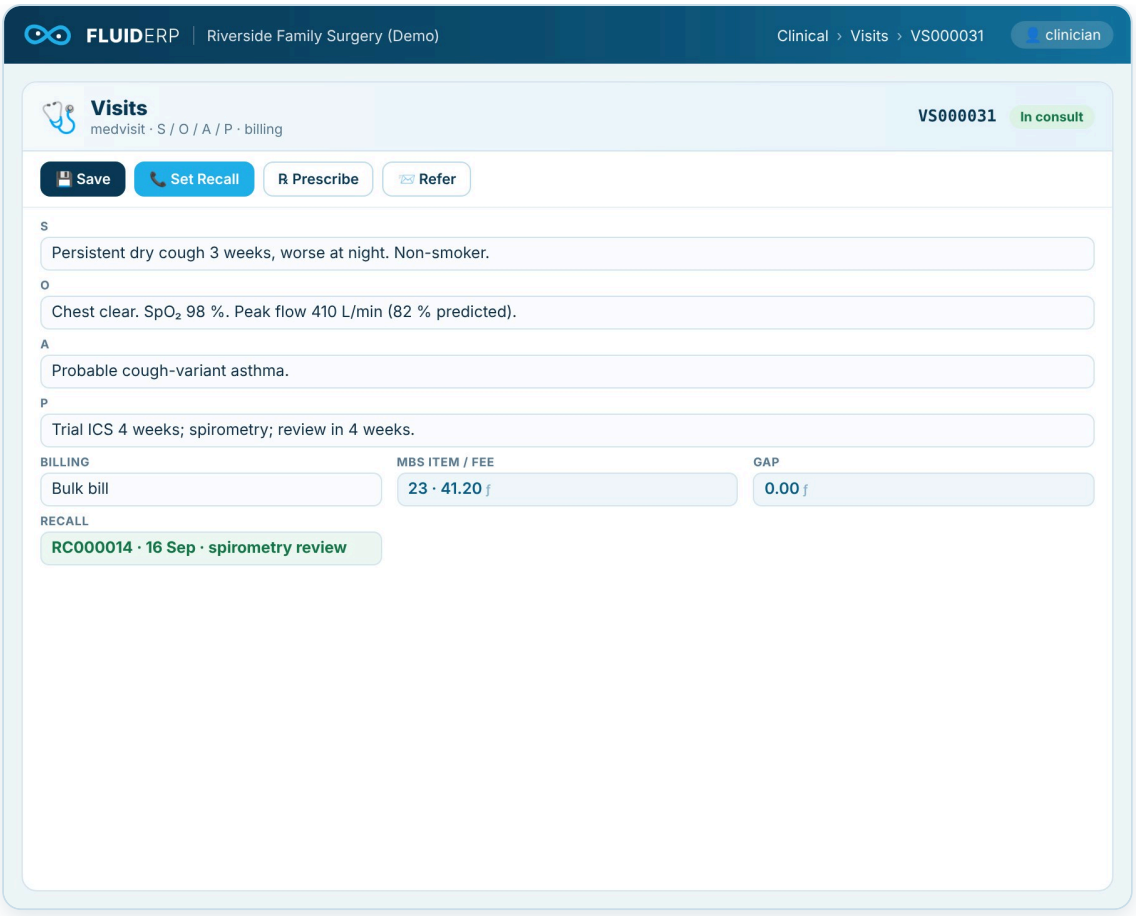
After sign-in you see the launcher: a grid of tiles for the screens, dashboards, reports and matching screens your group may open. A red badge on a tile counts records waiting for you. Use the search box to jump straight to a form, a report or a record number.



Reception's launcher: waiting room, results in-tray and recalls carry live badges.

Anatomy of a screen

1. **Header** — the form name, the table it belongs to, the record number and a coloured **status** pill (for example Closed, Posted · sealed, Approved).
2. **Toolbar** — 💾 **Save** (navy) saves this record. Aqua buttons are **posting buttons**: they write to other tables. Outline buttons recalculate (🧮), print (🖨️) or open related screens.
3. **Fields** — typed fields are white; calculated fields (ƒ) are tinted and read-only. Red, amber and green fields are flags raised by a calculation (expired, due soon, OK).
4. **Tabs** — the record's lines and related records (lines, movements, attachments, signatures). Child rows are saved with the parent.
5. **Banners** — an amber or red banner explains why a record is locked, sealed, embargoed or refused. Read it before calling support; it names the rule.



A visit: SOAP note, MBS item and fee from the fee item, the derived gap, and the follow-up that sets the recall.

Everyday actions

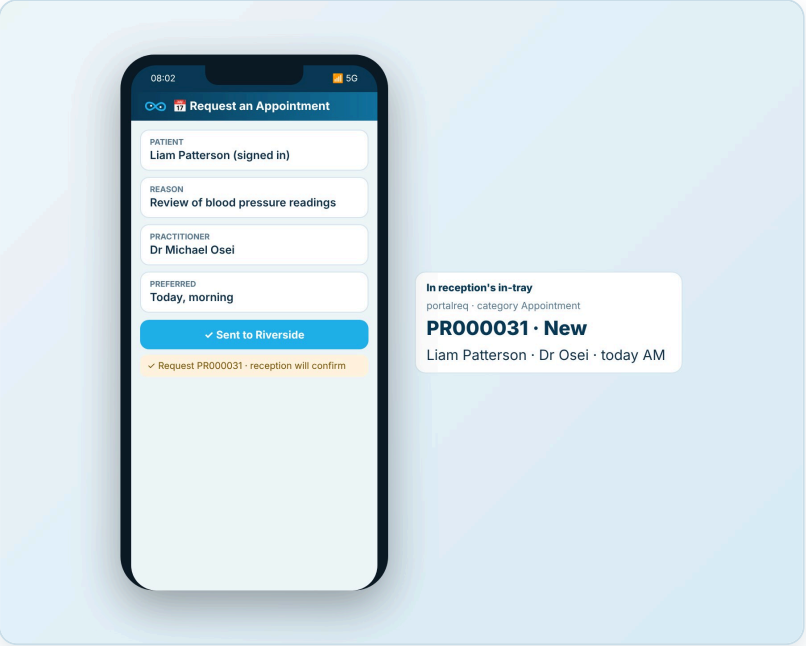
TO ...	DO THIS
Create a record	Open the tile, press ➕ **New**, fill the white fields, press 💾 **Save**. The number is issued on first save.
Find a record	Use the search box on the launcher or the filter row above any list. Record numbers, names and (where enabled) full text are searchable.
Refresh calculated fields	They refresh on save. 🧮 **Recalculate** re-runs them on demand (for example after a related record changed).
Print or save as PDF	🖨️ **Print** opens the printed copy in the document viewer; choose 🖨️ **Print / PDF** for paper or a PDF, or 💾 **Save** for the file.
Work offline (phone apps)	Forms marked as captures keep working with no signal; they wait in the **outbox** and send when you are back in range.

4 Appointments and the waiting room

A request from the patient app becomes an appointment in one press; the waiting room is a board over the appointment status.

Receive a request from the patient app

Who **patient** | Where **Patient app › Request an Appointment** | Table **portalreq**

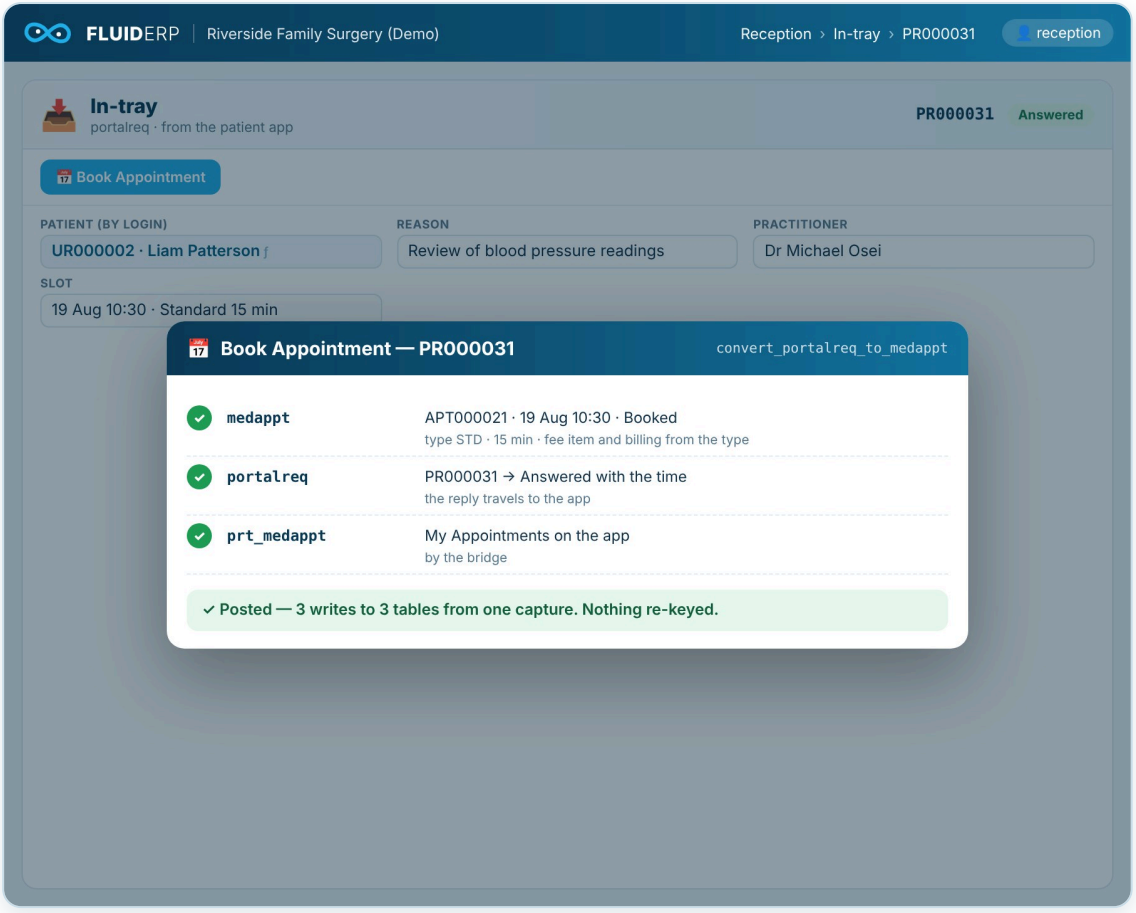


Liam Patterson asks for a review of his blood-pressure readings with Dr Osei.

1. The patient signs in, chooses a reason, a practitioner and a preferred time, and presses **Send request**.
2. The request lands in reception's **In-tray** as PR000031 · New. Reception does not retype it.

Book the appointment

Who **reception** | Where **Reception › In-tray** | Table **medappt · portalreq**



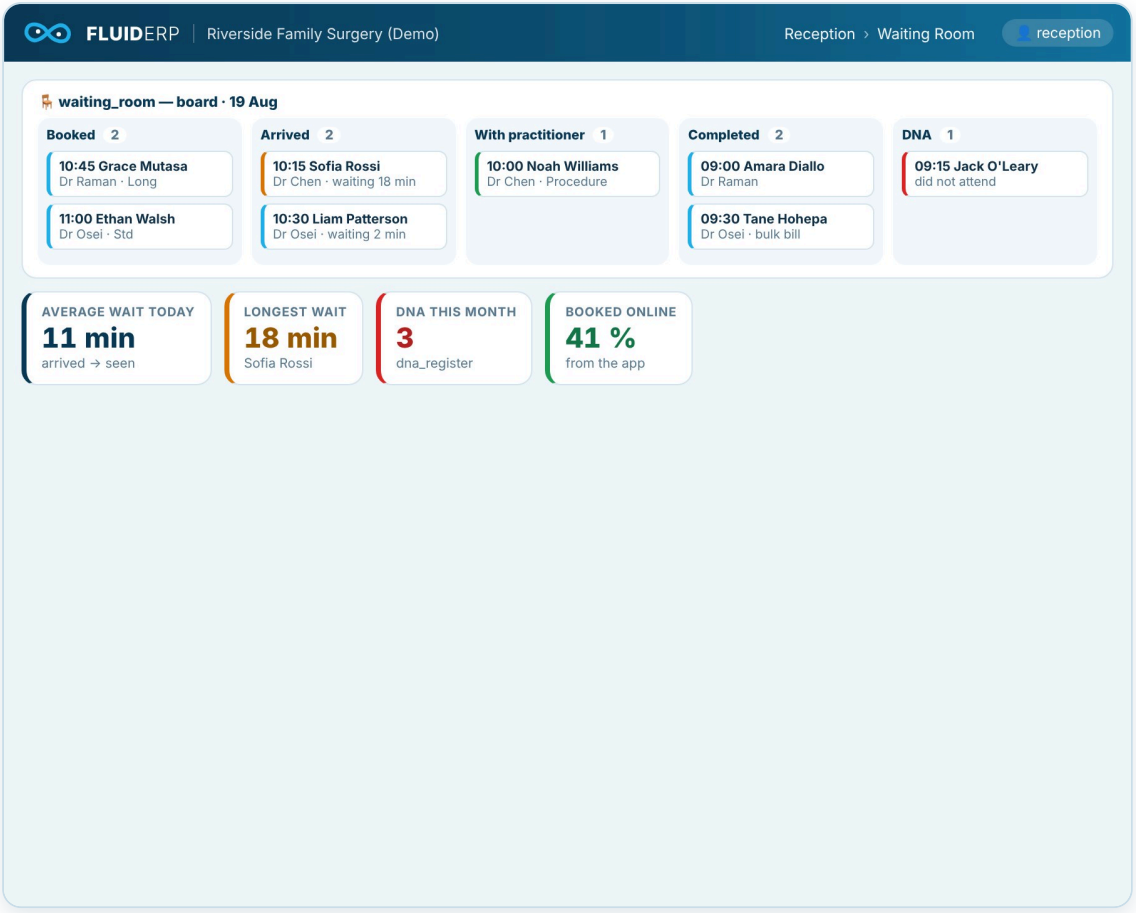
📅 Book Appointment: the patient is found by his app login; APT000021 is Booked; the request is answered.

1. Open the request and choose the slot.
2. Press 📅 **Book Appointment**.

What 📅 Book Appointment writes	`convert_portalreq_to_medappt`
✓ **`medappt`**	APT000021 · Booked · type length and default fee
✓ **`portalreq`**	Answered with the time
✓ **`prt_medappt`**	My Appointments on the app

Run the waiting room

Who **reception** | Where **Reception › Waiting Room** | Table **medappt**



Booked → Arrived → With practitioner → Completed; wait minutes derived; DNAs flagged.

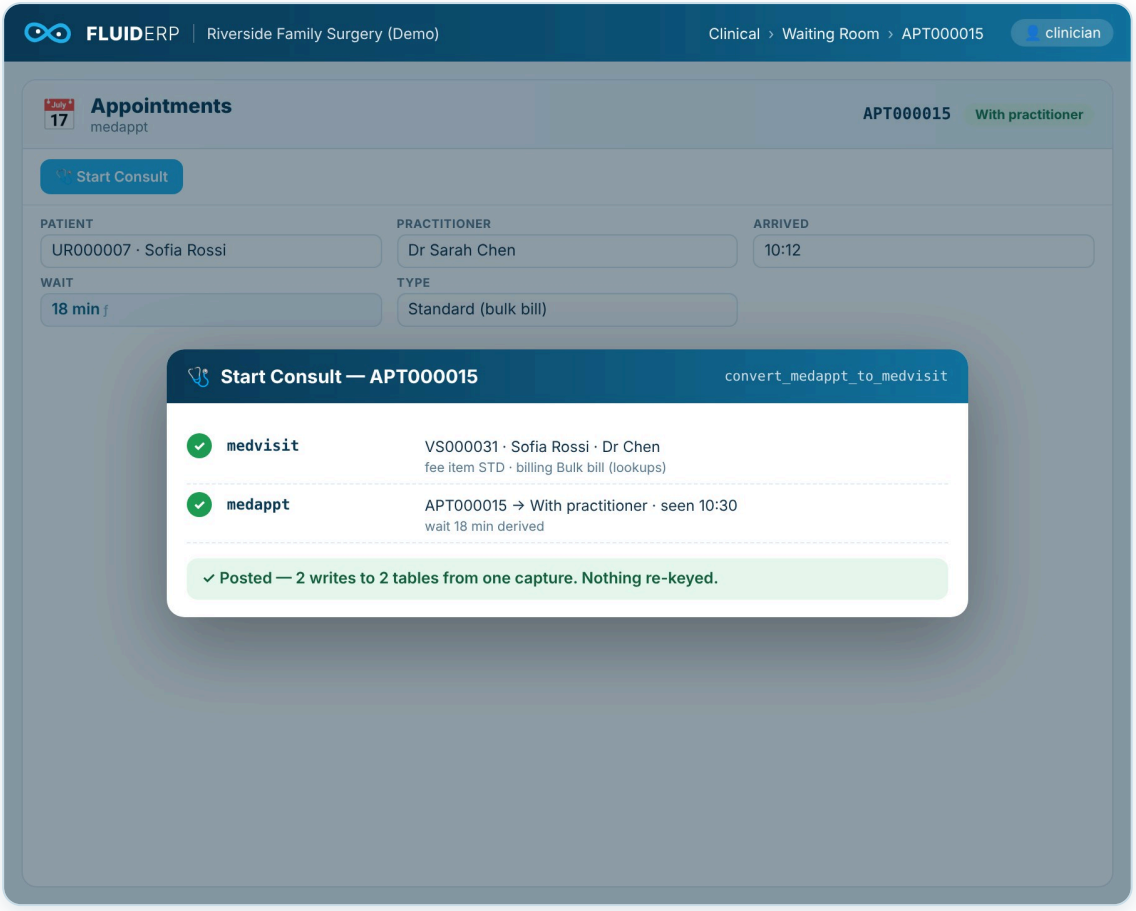
1. Move a card to **Arrived** when the patient checks in; the arrival time is stamped.
2. The wait in minutes is calculated until the practitioner starts the consult.
3. Mark **DNA** for patients who did not attend; the DNA register counts them.

5 Consultations and the clinical record

The visit is made from the appointment. SOAP, the item and the follow-up are written once.

Start a consultation

Who **doctor** | Where **Clinical › Waiting Room** | Table **medvisit · medappt**

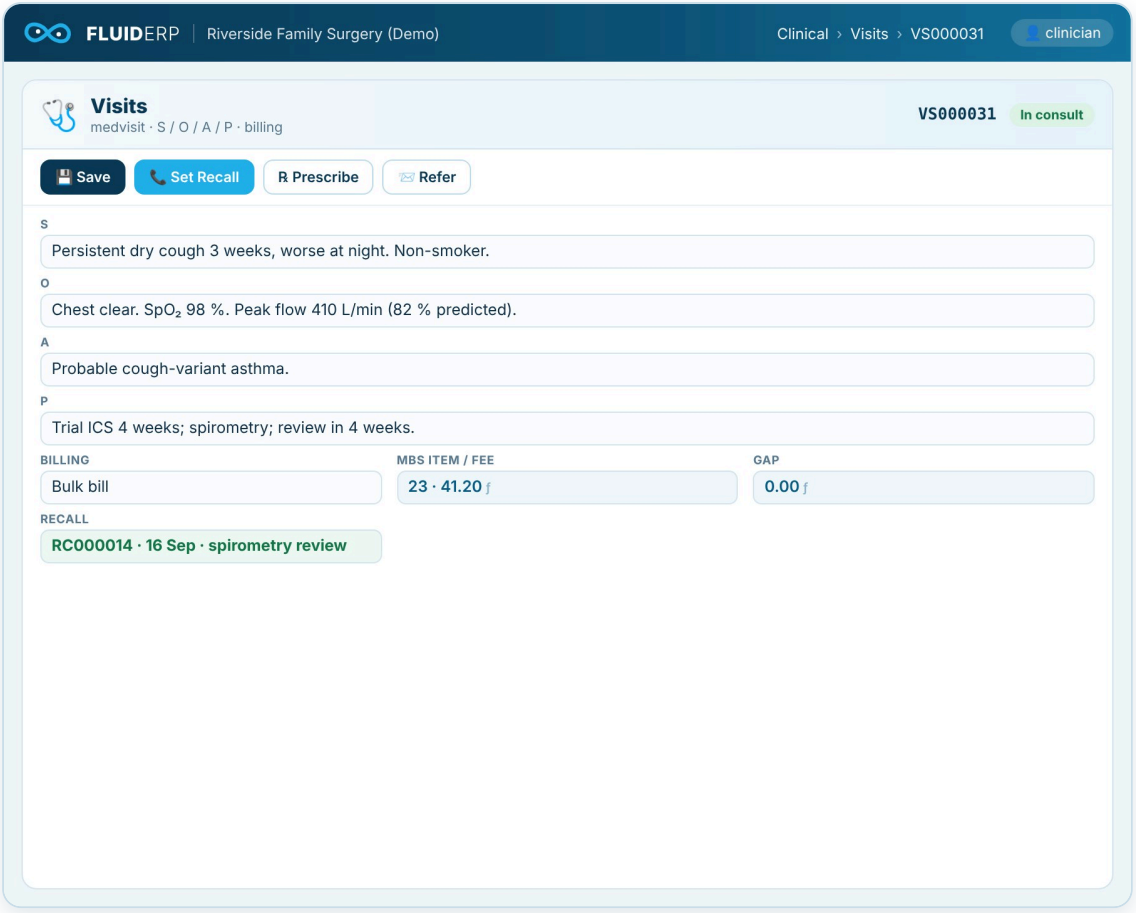


Dr Chen calls Sofia in: APT000015 becomes visit VS000031.

What Start Consult writes	convert_medappt_to_medvisit
✓ **medvisit**	VS000031 · patient, practitioner, fee item, billing type
✓ **medappt**	Stamped With practitioner

Write the SOAP note and set a recall

Who **doctor** | Where **Clinical › Visits** | Table **medvisit · medrecall**



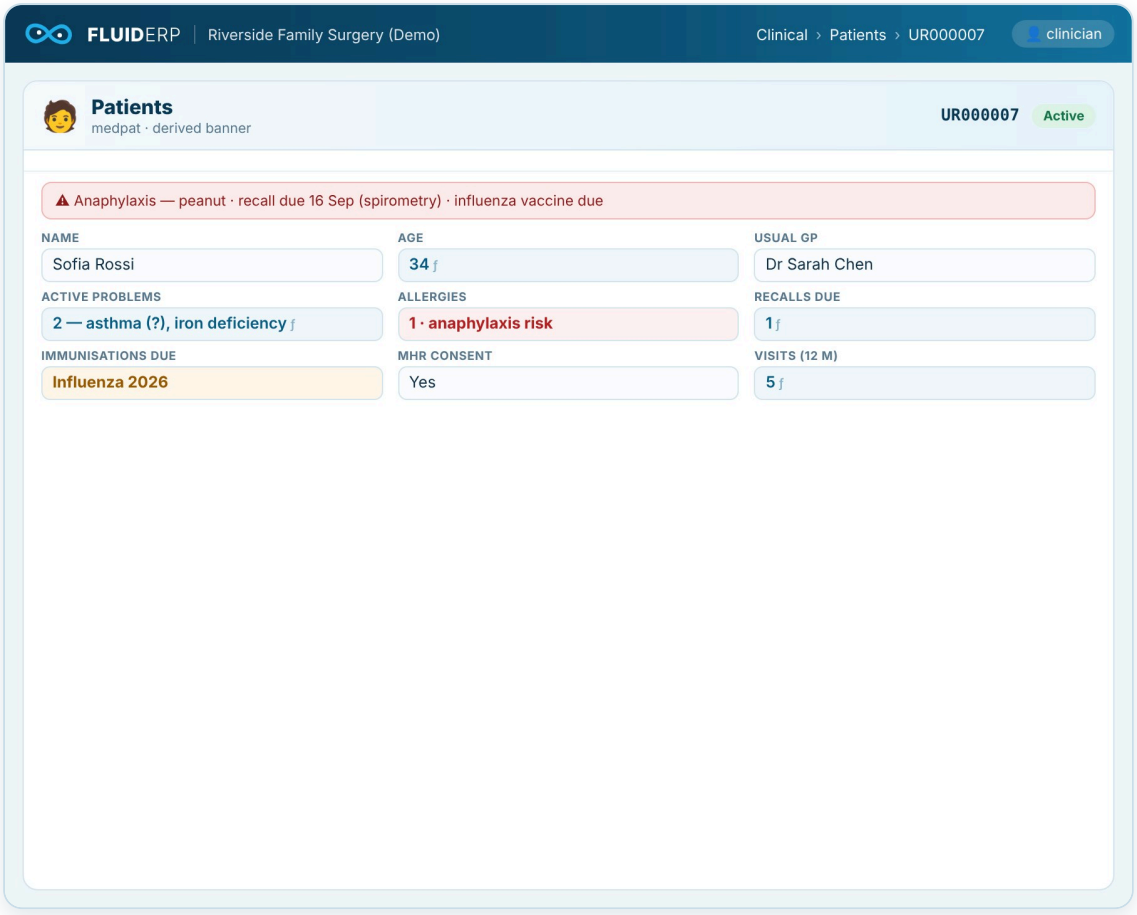
Subjective, Objective, Assessment, Plan; MBS item from the fee item; 📞 Set Recall writes RC000014.

1. Write the **SOAP** fields.
2. The MBS item and schedule fee come from the fee item; the gap is derived.
3. For a follow-up, press 📞 **Set Recall** with the reason and interval. No paper list.

Read the patient banner

Who **clinicians** | Where **Clinical › Patients** | Table **medpatient**

The ⚠ alerts line is derived from the clinical rows. Change the underlying row (a new allergy, a completed immunisation) and the banner follows.



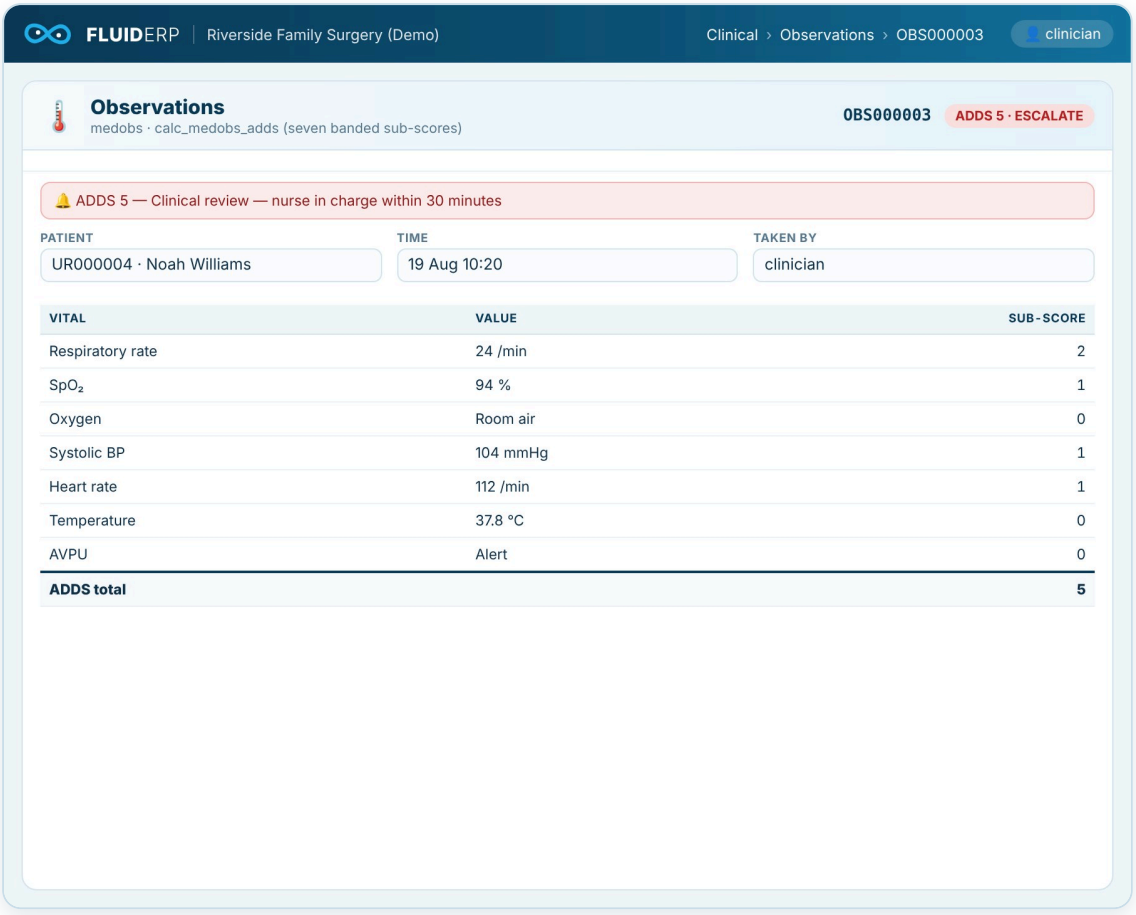
Age, usual GP, problems, allergies (anaphylaxis), recalls, care-plan review and immunisations due.

6 Observations, results and recalls

Vital signs produce one early-warning score; results are reviewed and actioned; recalls track their attempts.

Record observations

Who **nurse** | Where **Clinical › Observations** | Table **medobs**

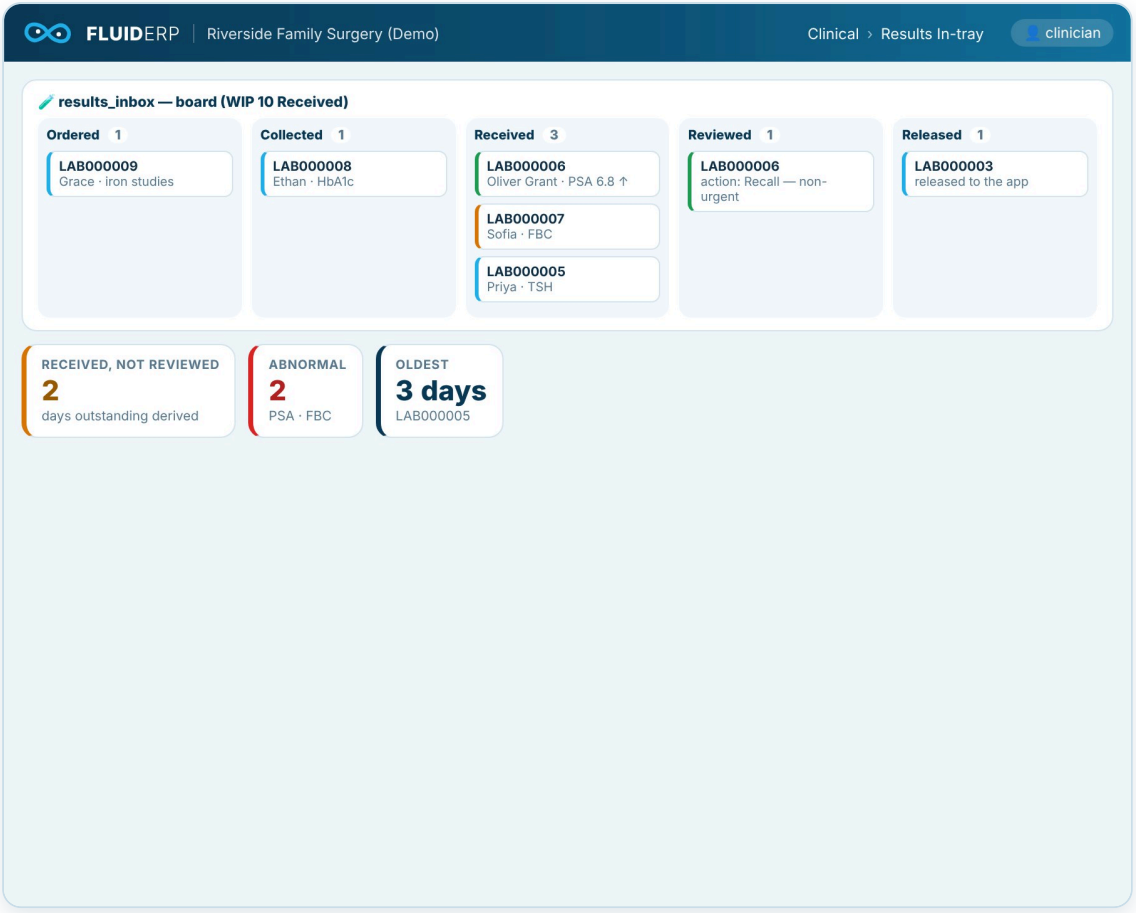


OBS000003: Noah's seven vital signs score ADDS 5 → Clinical review — nurse in charge.

1. Enter RR, SpO_2, oxygen, BP, HR, temperature and AVPU once.
2. Each sub-score, the **ADDS total** and the **escalation** are calculated.
3. Follow the escalation shown; it appears on the Clinical Quality dashboard.

Review the results in-tray

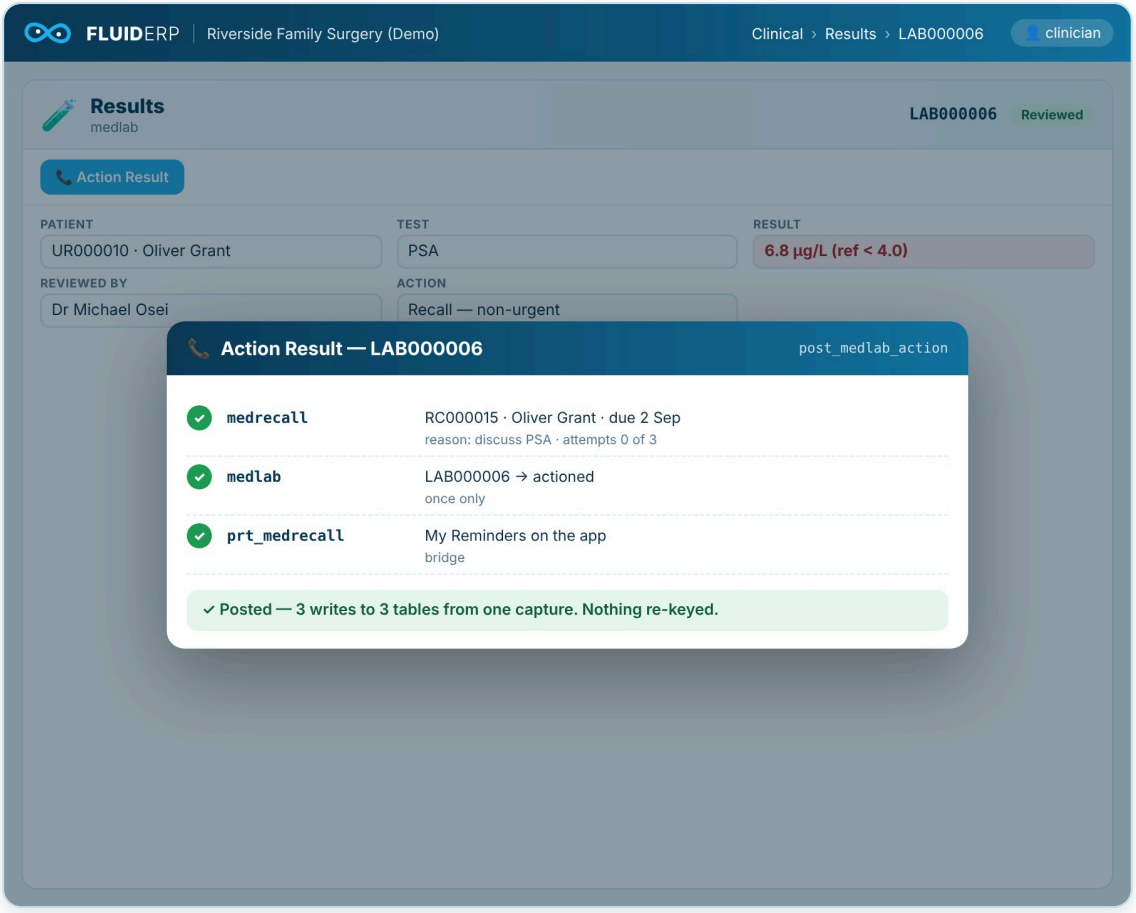
Who **doctor** | Where **Clinical › Results In-tray** | Table **medlab**



Ordered → Collected → Received → Reviewed → Released. LAB000006 (raised PSA) is reviewed and set to Recall — non-urgent.

Action a result

Who **doctor** | Where **Clinical › Results** | Table **medrecall · medlab**



📞 Action Result writes recall RC000015 due in 14 days with three tracked attempts.

What 📞 Action Result writes	action_medlab
✓ **medrecall**	Recall due today (urgent) or in 14 days (non-urgent)
✓ **medlab**	Actioned · Released
✓ **prt_medrecall**	My Reminders on the patient app

TIP

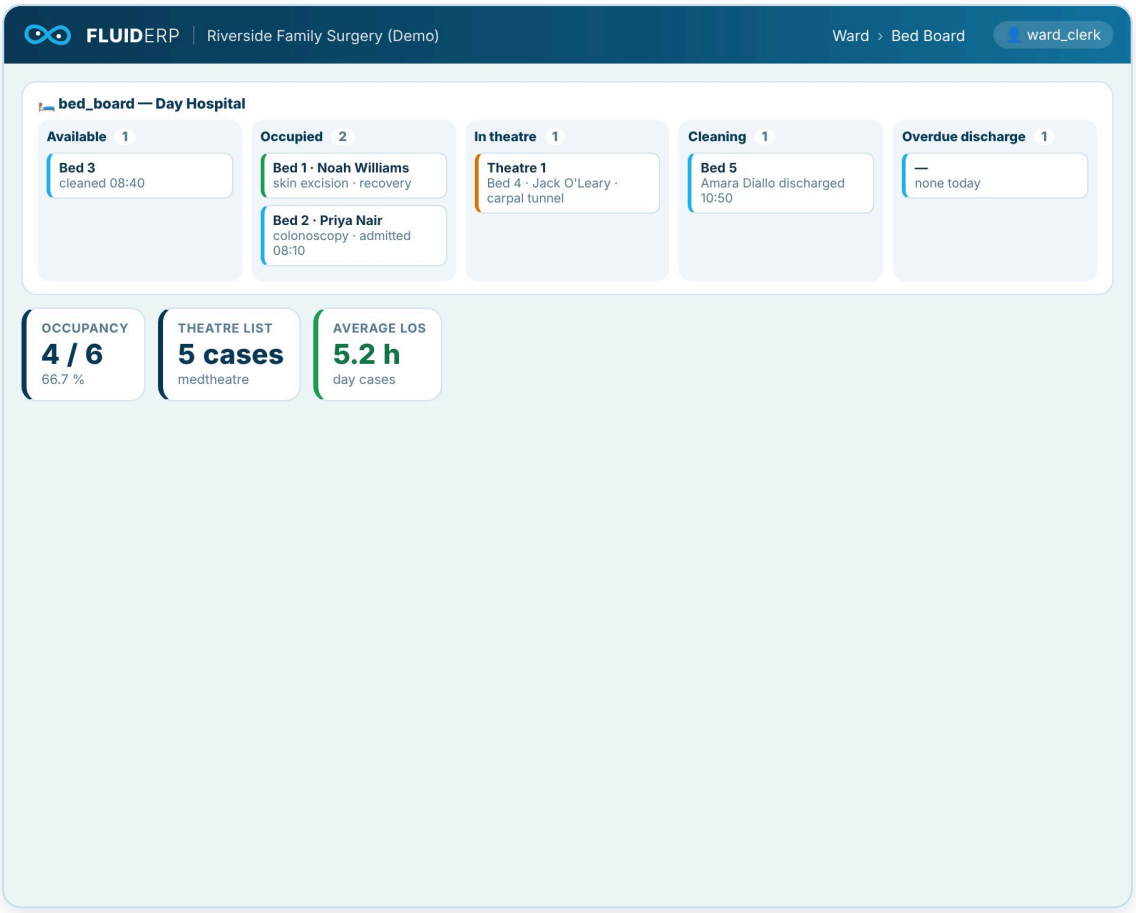
The third contact attempt is a letter, so a recall is closed — never forgotten.

7 The ward: bed board and discharge

Admission and discharge move the bed; length of stay and overdue discharge are derived.

Use the bed board

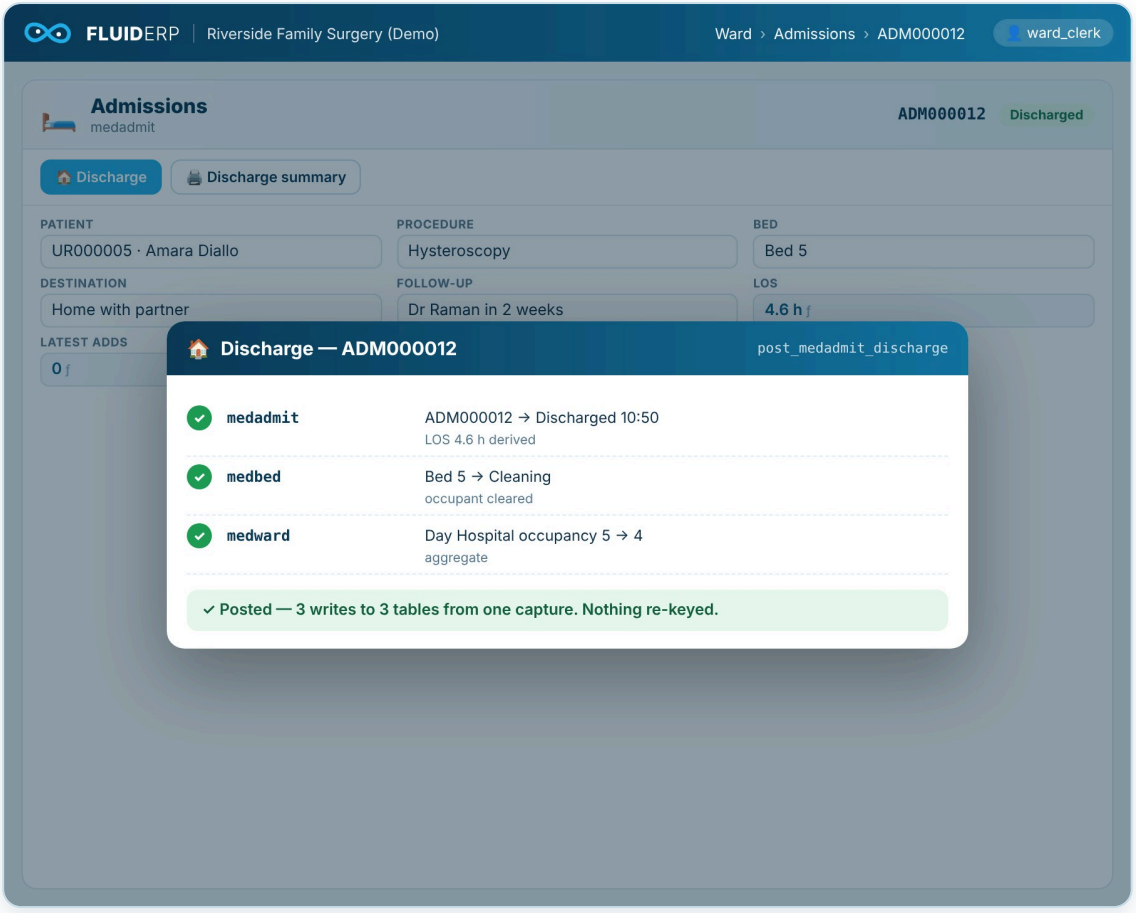
Who **ward clerk** | Where **Ward › Bed Board** | Table **medadmit · medbed**



Booked → Admitted → In theatre → Recovery → Discharged; 🛏 Admit sets the bed Occupied.

Discharge a patient

Who **ward clerk, doctor** | Where **Ward › Admissions** | Table **medadmit · medbed · medward**



ADM000012: the discharge summary, destination and follow-up typed once.

1. Complete the discharge summary, destination and follow-up.
2. Press 🏠 **Discharge**.
3. Print the discharge summary for the GP (chapter 10).

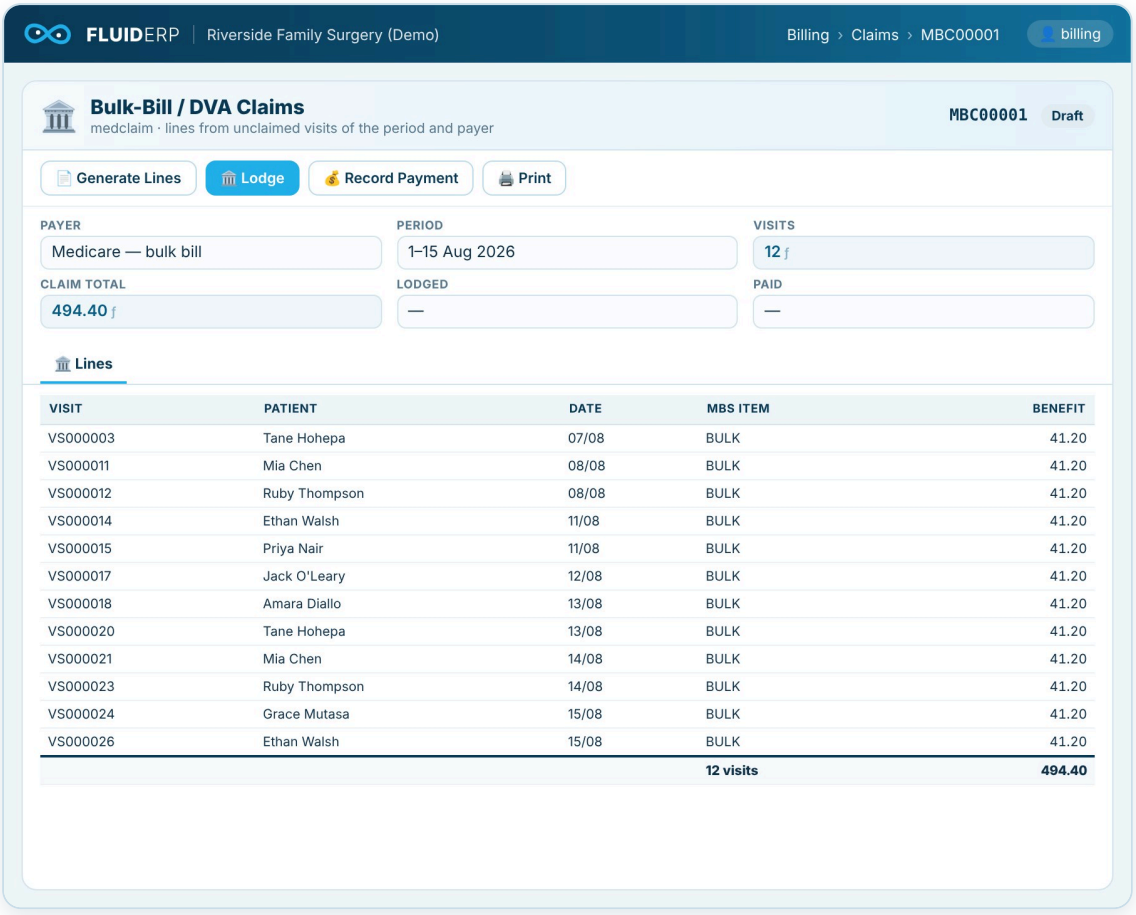
What 🏠 Discharge writes	discharge_medadmit
✓ **medadmit**	Discharged · length of stay stamped
✓ **medbed**	Bed → Cleaning
✓ **medward**	Occupancy recalculated

8 Billing and claims

The claim is generated from unclaimed bulk-billed visits. Lodging and payment post the ledger. A bulk-billed visit can never become a private invoice.

Generate the claim lines

Who **billing** | Where **Billing › Claims** | Table **medclaim · medclaimlines**

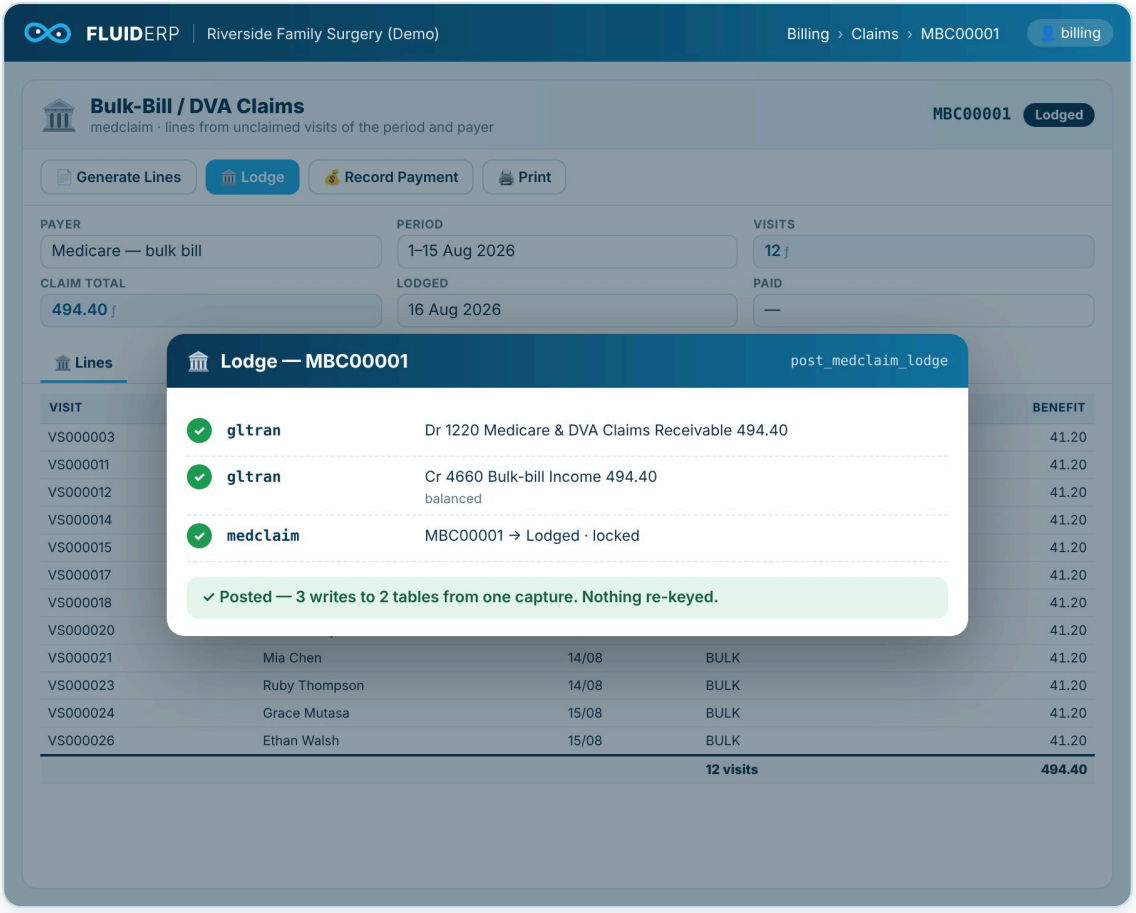


MBC00001: twelve bulk-billed visits × 41.20 = 494.40.

What 📄 Generate Lines writes	`generate_medclaim_lines`
✓ **`medclaimlines`**	One line per unclaimed visit of the period and payer
✓ **`medvisit`**	Visits stamped claimed — never claimed twice

Lodge the claim

Who **billing** | Where **Billing › Claims** | Table **gltran**



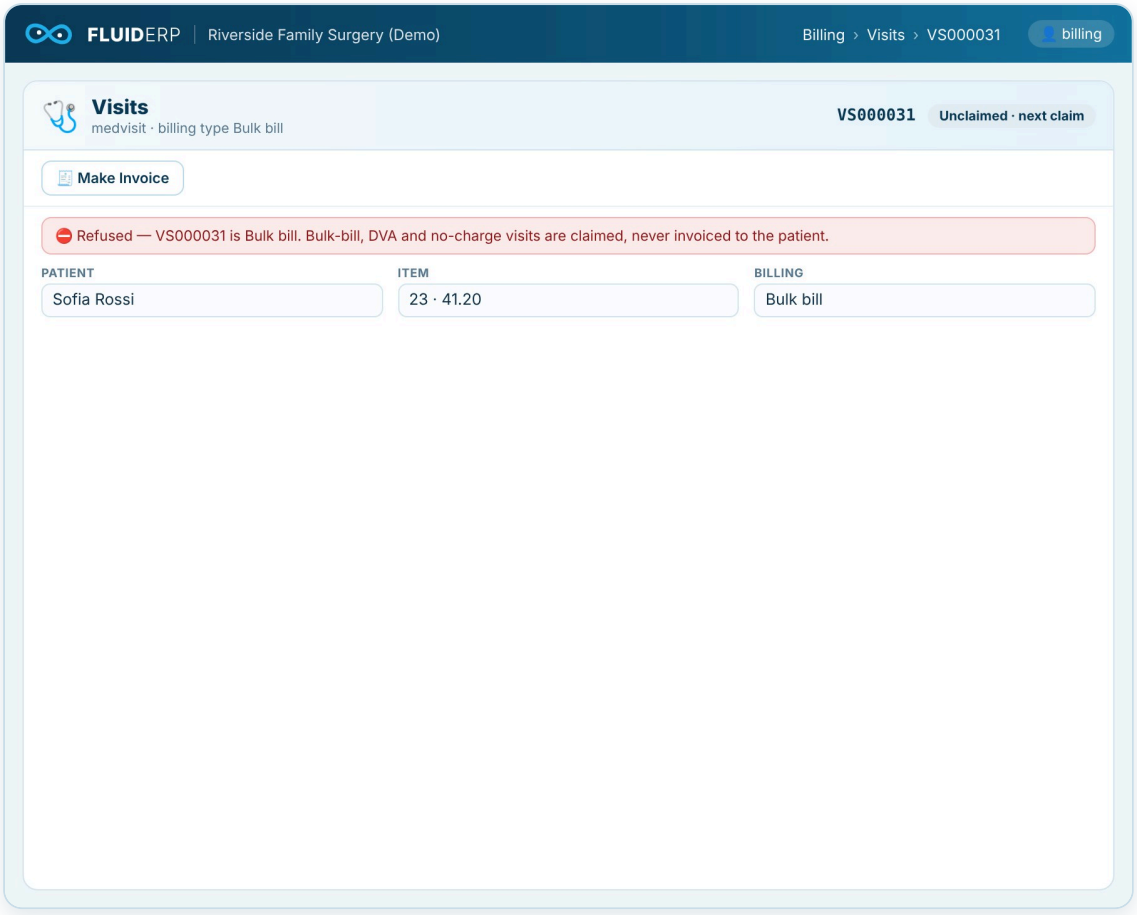
Lodge posts Dr 1220 Medicare & DVA Claims Receivable · Cr 4660 bulk-bill income, and locks the claim.

What 🏛 Lodge writes	lodge_medclaim
✓ **gltran**	Dr 1220 Claims receivable 494.40
✓ **gltran**	Cr 4660 Bulk-bill income 494.40
✓ **medclaim**	Lodged · locked

Invoice a private visit (and why a bulk-billed one is refused)

Who **billing** | Where **Billing › Visits** | Table **slinv**

A private visit makes its tax invoice from the visit with nothing re-typed. Bulk-bill, DVA and no-charge visits are refused — the claim is the only route.



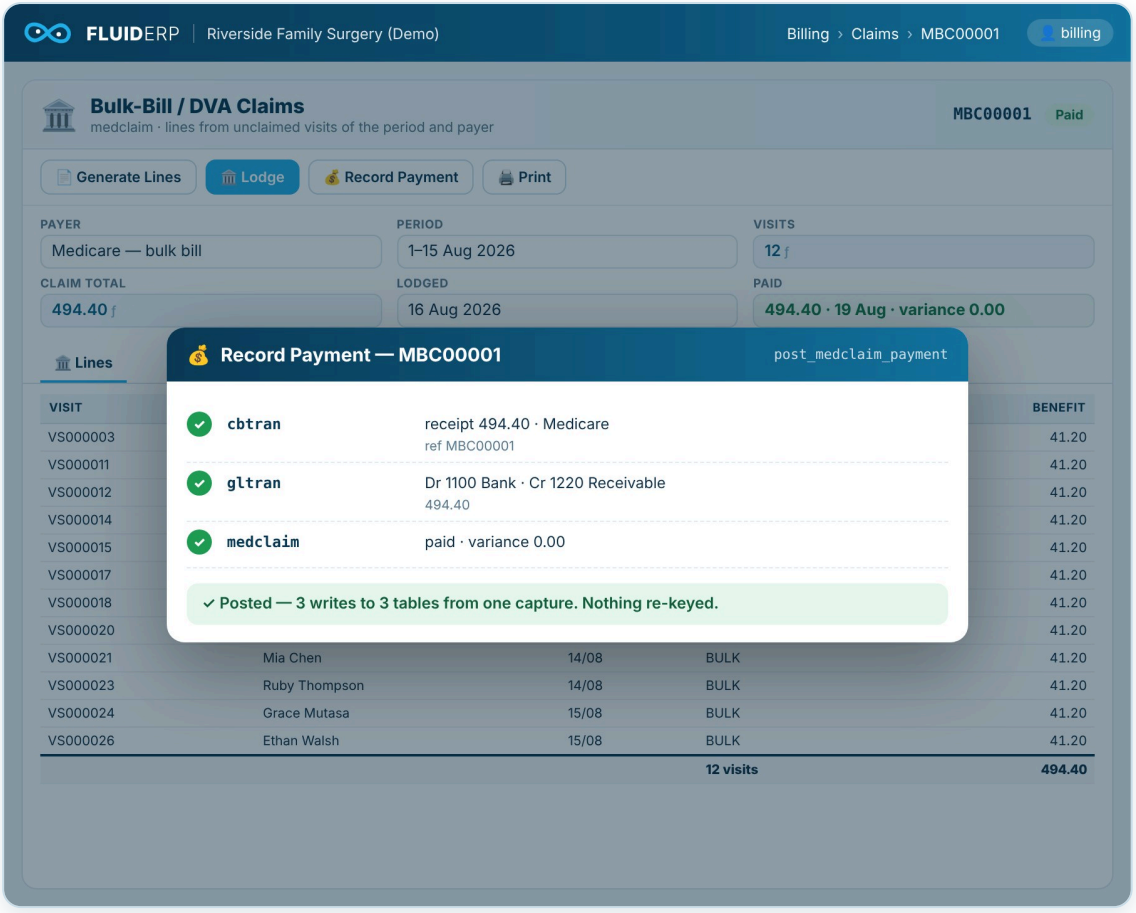
Converting VS000031 to a patient invoice is refused: it was bulk-billed.

If the system refuses

YOU SEE	WHAT IT MEANS / WHAT TO DO
A bulk-billed visit cannot be invoiced to the patient	Claim it on the bulk-bill claim.

Record the payment

Who **billing** | Where **Billing › Claims** | Table **cbtran · gltran**



The Medicare payment: cashbook written, receivable cleared, no variance.

What 💰 Record Payment writes	pay_medclaim
✓ **cbtran**	Receipt from Medicare
✓ **gltran**	Dr 1100 Bank · Cr 1220 Receivable
✓ **medclaim**	Paid · variance derived

9 Critical dashboards

Three dashboards answer: how is today running, what must not fall through the cracks, and where the claims stand.

Practice Day

Where **Dashboards › Practice Day** | Who **practice manager, reception**

Appointments by practitioner and status, waits, DNAs and online bookings.



Practice Day

What each tile is and where it comes from

Appointments
Today's appointments (38).
`medappt`

Average wait
Arrived → seen (11 min).
`medappt.wait_mins`

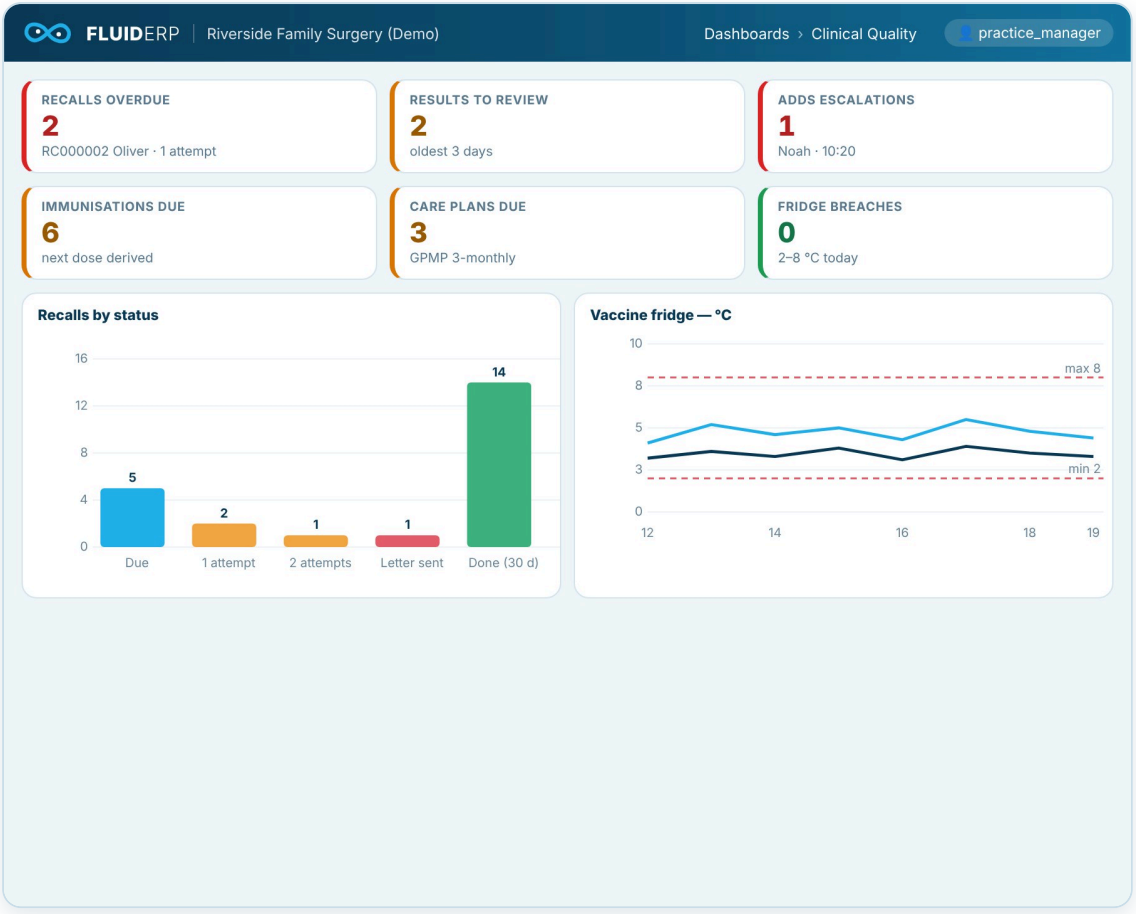
DNA
Did not attend today.
`medappt.status`

Online
Share booked from the app (41 %).
`portalreq · medappt`

Clinical Quality

Where **Dashboards › Clinical Quality** Who **practice manager, clinicians**

Every tile is a derived flag on the clinical rows.



Clinical Quality

What each tile is and where it comes from

Recalls overdue
Due date passed, not closed.
`medrecall`

Results to review
Received, not reviewed; oldest age.
`medlab`

Immunisations due
Next dose derived.
`medimm`

Care plans due
GPMP 3-monthly review.
`medcareplan`

ADDS escalations
Observations needing review.
`medobs`

Fridge breaches
Readings outside 2–8 °C.
`medfridge`

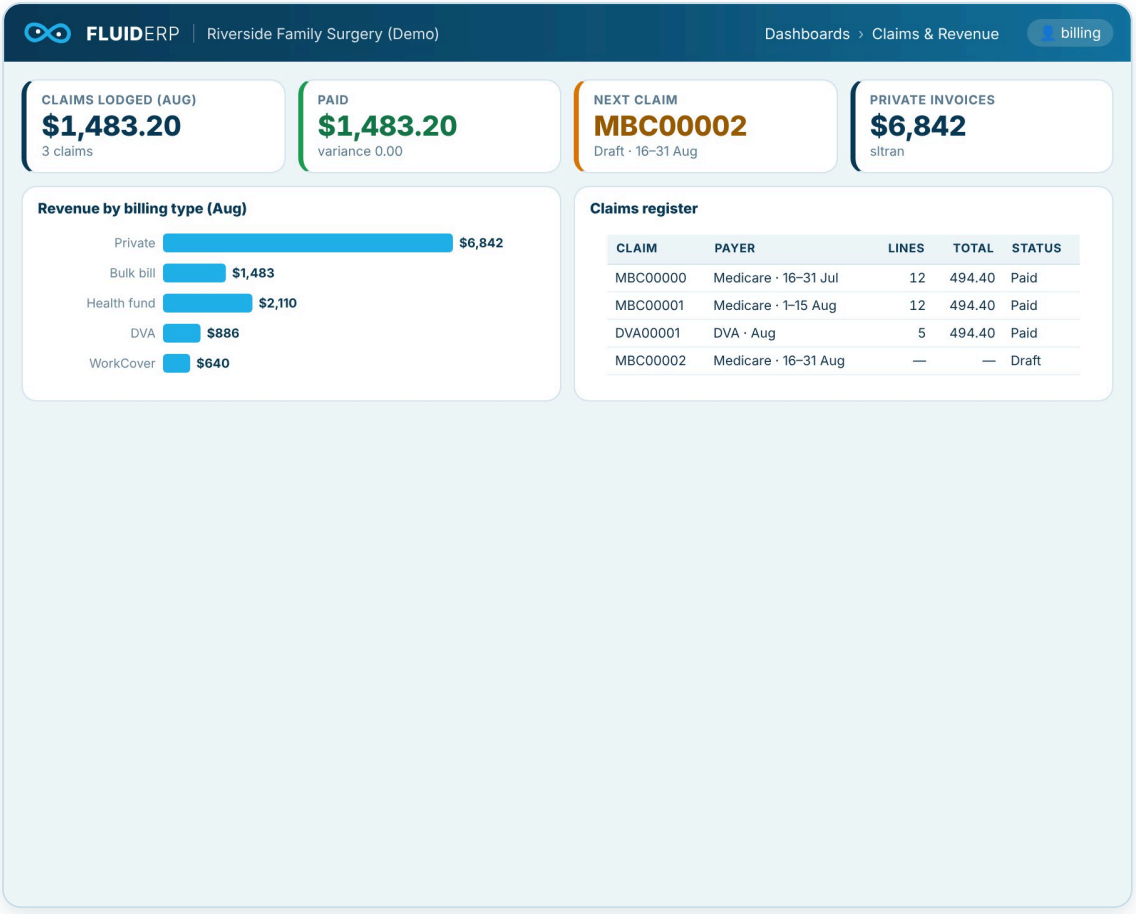
ACT ON IT

Open any tile to the rows behind it and act there.

Claims & Revenue

Where **Dashboards › Claims & Revenue** | Who **billing, practice manager**

Claims by status, revenue by billing type and the receivable.



Claims & Revenue

What each tile is and where it comes from

Lodged
$1,483.20 across three claims in the demo.
`medclaim`

Next claim
MBC00002 Draft for 16–31 August.
`medclaim`

Receivable
Balance of 1220.
`gltran`

10 Reports

The hospital edition ships clinical, ward and billing reports alongside the core ledger reports.

Running and printing a report

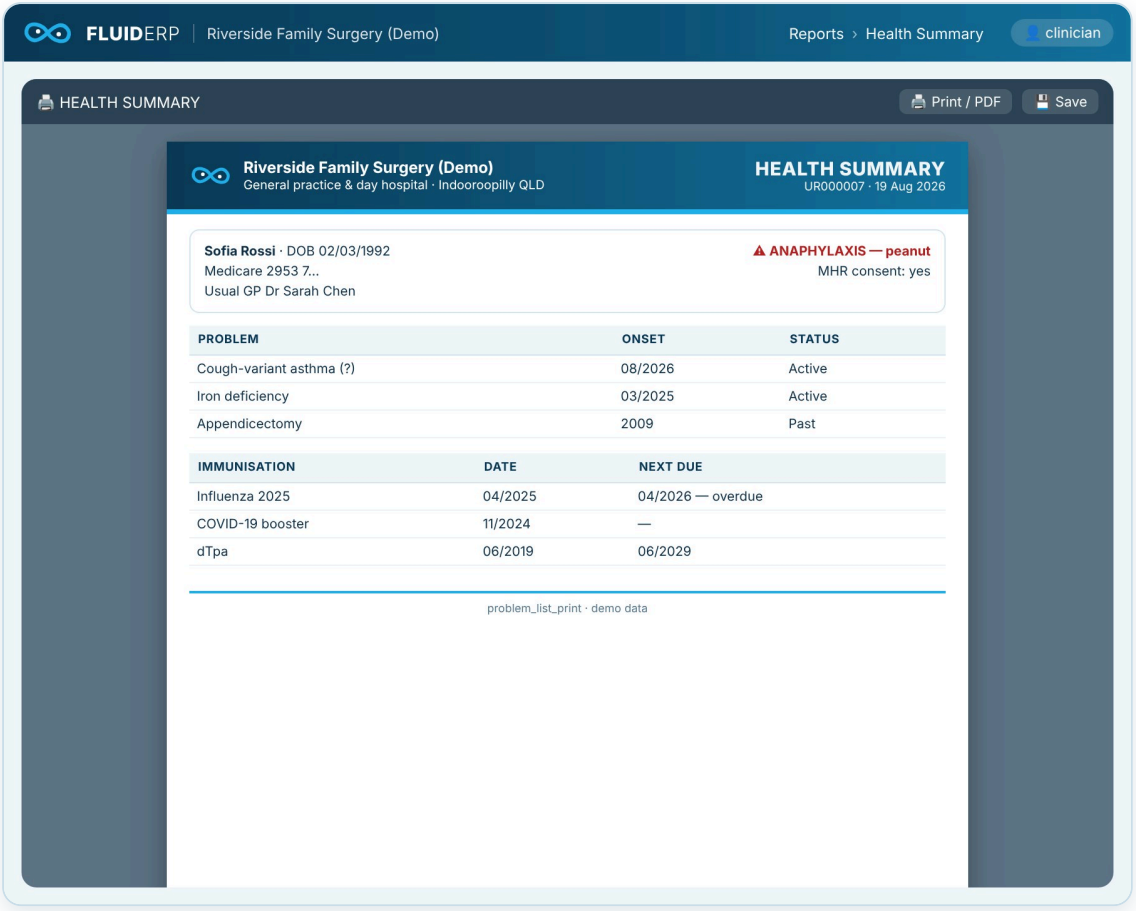
1. Open 🖨️ **Reports** on the launcher (or the report's own tile) and pick the report.
2. Fill the parameters. Required parameters are marked; dates accept `$today`-style defaults and lookups show “value — description”.
3. Press ▶ **Run**. The report draws its shape — grid with subtotals, chart, pivot, calendar, Gantt, board or tree — from the live rows.
4. Press 🖨️ **Print** to open the printed copy (letterhead, document header, footer) in the document viewer, then 🖨️ **Print / PDF** or 💾 **Save**. Reports with a file layout also offer 💾 **Export File**.

Report catalogue

REPORT	SHOWS	TYPICAL READER
Patient Health Summary	Problems, allergies, medicines, immunisations	clinicians, other providers
Referral Letter	Letter with alerts in the header	specialists
Discharge Summary	Procedure, findings, medicines, follow-up	GPs
Recalls Due	Recalls with attempts	reception
Waiting Times	Arrived → seen by practitioner	practice manager
DNA Register	Missed appointments	reception
Claims Register	Claims by status	billing
Theatre List	Cases by session	ward
Trial Balance	Core ledger	billing

Patient health summary

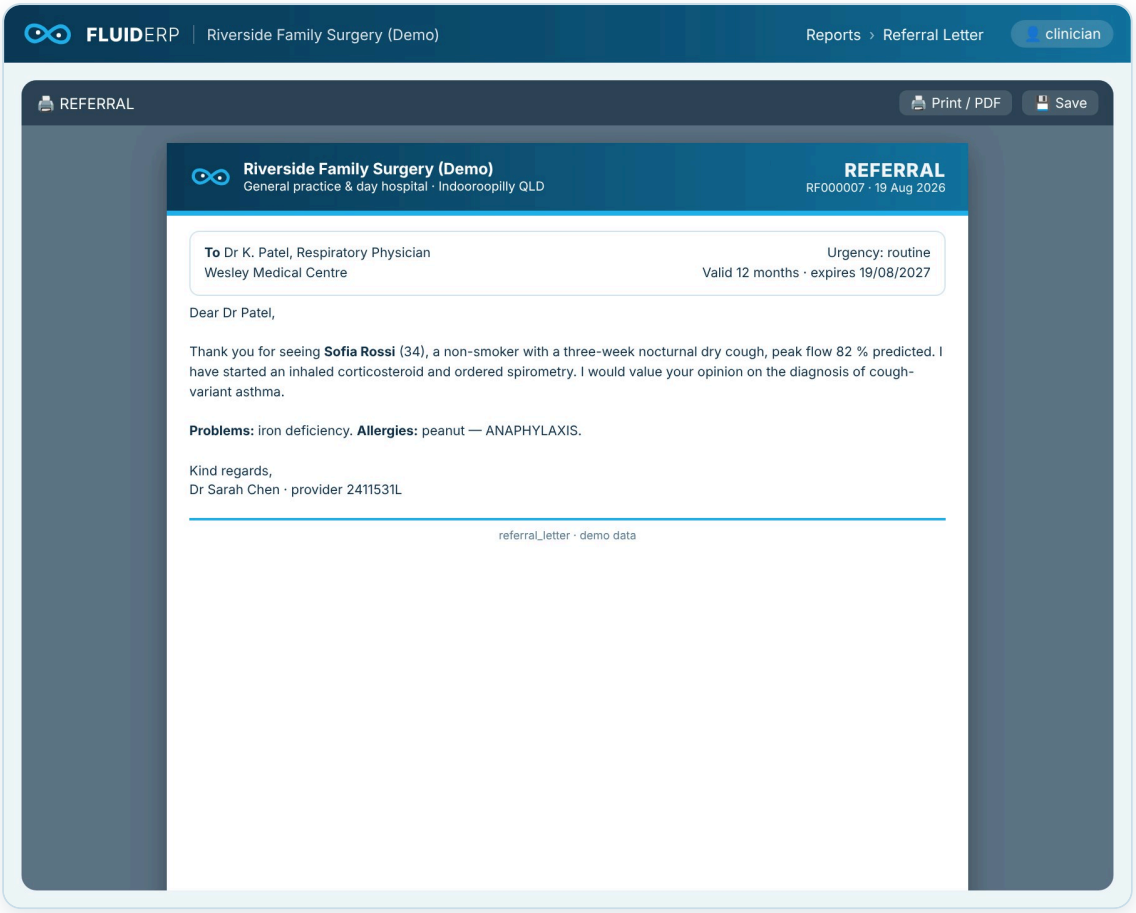
Problems, allergies with the anaphylaxis alert, medicines and immunisations — what a referral or a new GP needs.



Patient health summary

Referral letter

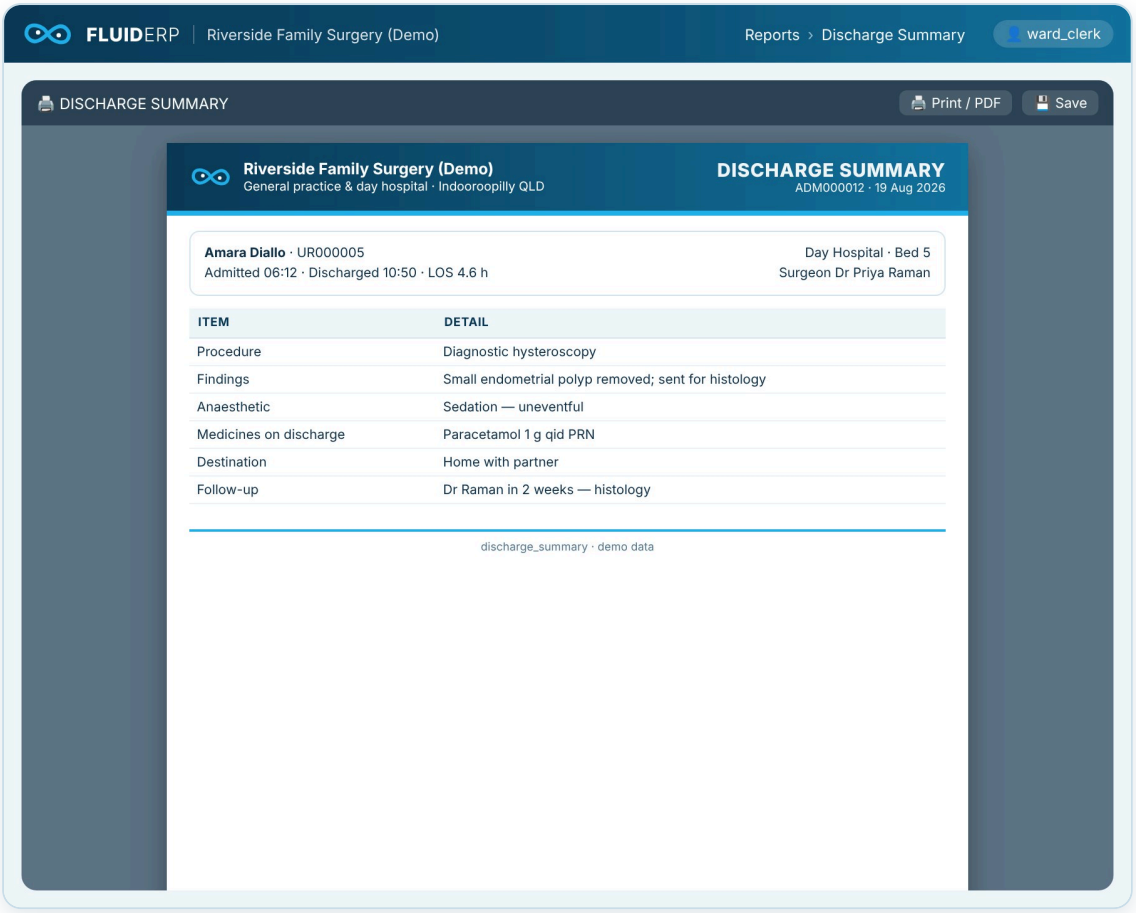
Printed from the referral row with problems and allergies joined into the header.



Referral letter

Discharge summary

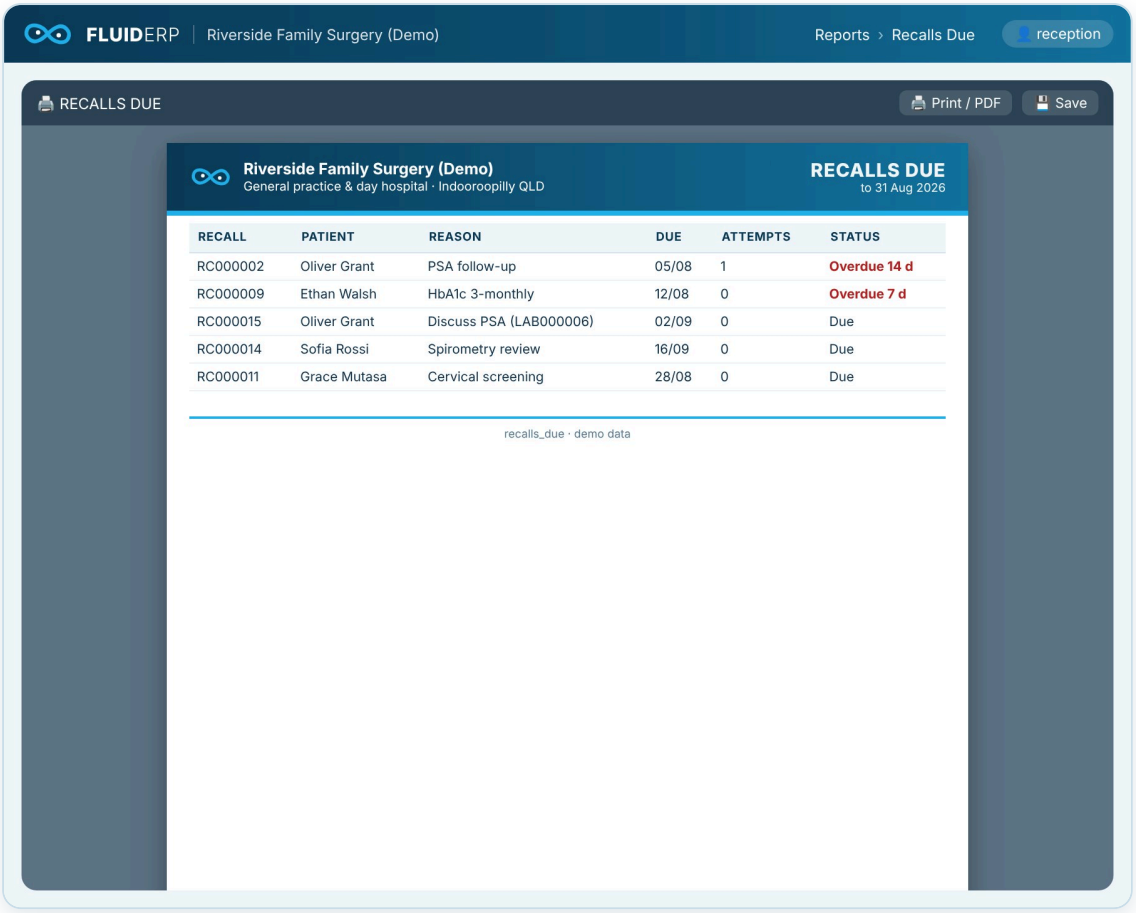
Procedure, findings, medicines, destination and follow-up from the admission row.



Discharge summary

Recalls due

Reason, due date, urgency and the three attempts.



Recalls due

11 Matching

A matching screen sets two lists side by side — for example bank statement lines and cashbook entries — and pairs the rows that belong together. Matching is a definition (`tblmatchdef`): it names the two sides, the fields to compare, the tolerances and what a confirmed match writes.

How every matching screen works

1. Open the matching screen from its 🔀 tile on the launcher, or with 🔀 **Match** on a form that takes part in it.
2. 🔄 **Auto Match** runs when the screen opens. Rows that meet the rule are paired and arrive **pre-ticked** in green.
3. Read the **summary strip**: how many pairs, how many unmatched on each side, and any outstanding amount.
4. Untick any pair you do not accept. To pair rows by hand, tick one row on each side and press 🔗 **Match Selected**. ✖ on a pair puts both rows back.
5. Press ✔ **Confirm Ticked**. Both sides are stamped (so they never match again), a session record is written, and the reconciliation report opens in the document viewer.

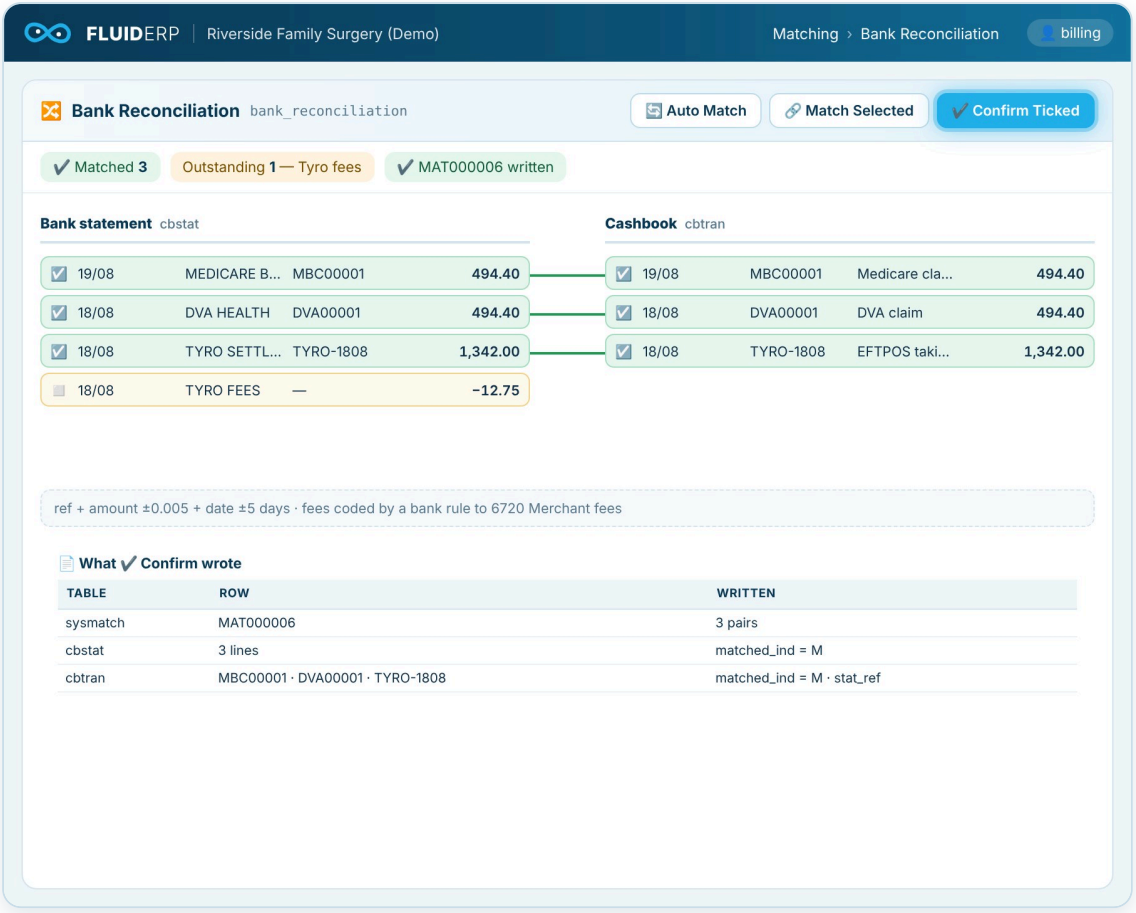
What ✔ Confirm Ticked writes	matching definition · confirm
✓ `sysmatch`	the session header — definition, who, when, number of groups (MAT number)
✓ `sysmatchlines`	one line per row in each confirmed group
✓ `each side`	the stamp field (for example matched_ind = M) and any counterpart fields the definition copies across

UNMATCHED IS INFORMATION

What is left after Auto Match is the exception list: an unexplained bank fee, a payment with no reference, a count that disagrees. Deal with those, not with the hundreds of rows that matched.

Bank reconciliation

Who **billing** | Where **Matching › Bank Reconciliation**



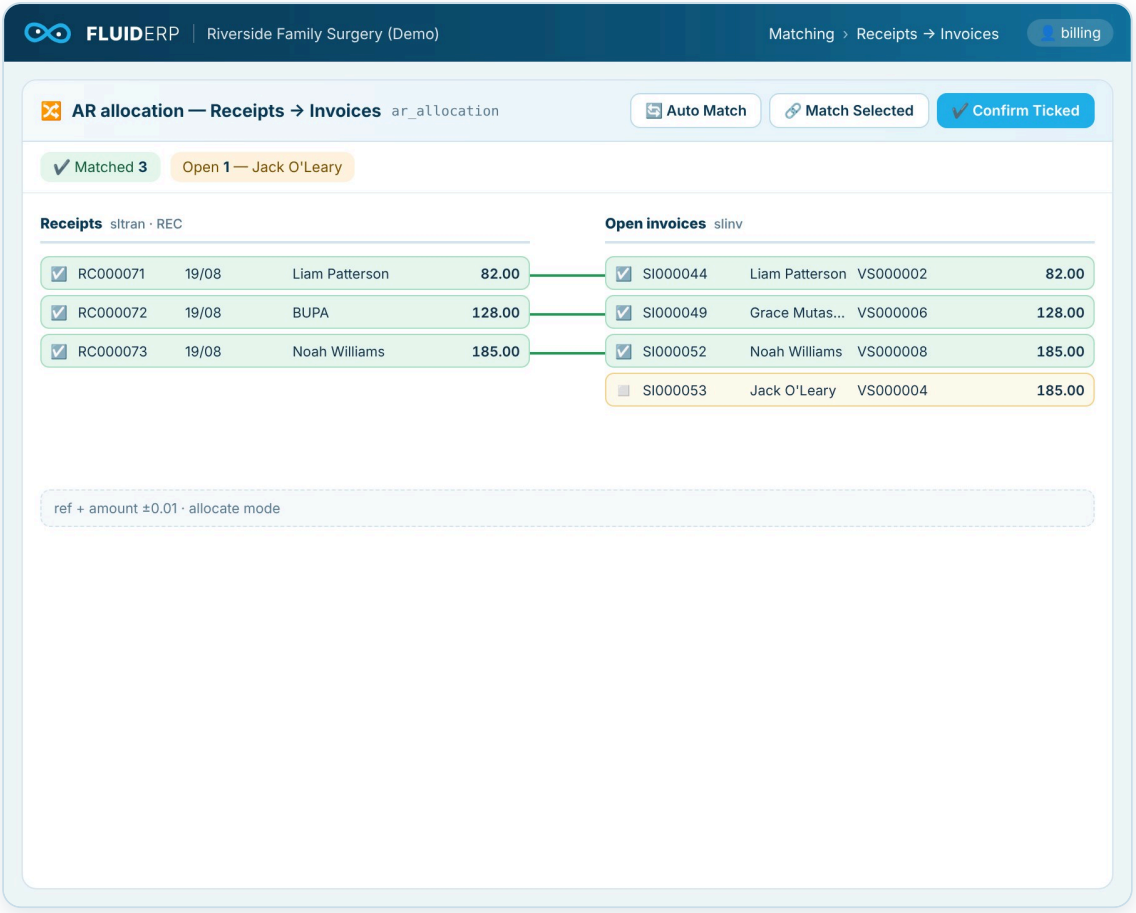
Medicare, DVA and the EFTPOS settlement pair with the cashbook receipts.

1. Import the statement once.
2. Press 🔄 **Auto Match**; review; ✔ **Confirm Ticked**.

What ✔ Confirm writes	bank_reconciliation
✓ **sysmatch**	Match group
✓ **cbstat**	Statement lines matched
✓ **cbtran**	Cashbook lines matched

Private accounts: receipts to invoices

Who **billing** | Where **Matching › Receipts → Invoices**



Patient and fund payments pair with private invoices; the unpaid remain as exceptions.

1. Press 🔄 **Auto Match** (reference + amount, oldest first).
2. Follow up the open items; ✔️ **Confirm Ticked**.

12 Messages, refusals and what to do

FLUID refuses an action rather than let a figure go wrong. Every refusal names its rule. These are the ones you will meet on this platform.

MESSAGE (IN SHORT)	WHY	WHAT TO DO
A bulk-billed visit cannot be invoiced to the patient	Bulk-bill, DVA and no-charge visits are claimed.	Use the claim.
Visit already claimed	Generate Lines stamps visits.	Nothing to do; the line exists.
The claim is locked	Lodged claims are not edited.	Raise an adjustment.
A lodged date is required	Lodging posts on that date.	Enter the date.
Request already answered	Book Appointment runs once.	Open the appointment.
Bed not available	Admit needs a Clean bed.	Choose another bed or mark it clean.

13 Data reference and glossary

Tables you will meet

TABLE	HOLDS	WRITTEN BY
`medpatient`	Patients and the derived banner	reception; calculations
`portalreq`	Requests from the patient app	the app
`medappt`	Appointments and waits	📅 Book Appointment; reception
`medvisit`	Visits, SOAP, items	🩺 Start Consult; clinicians
`medobs`	Observations and ADDS	nurses
`medlab`	Results	labs; clinicians
`medrecall`	Recalls and attempts	📞 buttons
`medadmit · medbed · medward`	Admissions, beds, wards	ward clerk
`medclaim · medclaimlines`	Claims and lines	billing buttons
`gltran · cbtran · sltran`	Ledger, cashbook, receivables	posting buttons
`sysmatch`	Match groups	matching screens

Glossary

TERM	MEANING
MBS	Medicare Benefits Schedule — item numbers and benefits.
Bulk bill	The practice claims the benefit from Medicare; no charge to the patient.
DVA	Department of Veterans' Affairs.
SOAP	Subjective, Objective, Assessment, Plan.
ADDS	Adult Deterioration Detection System — early-warning score.
DNA	Did not attend.
GPMP	General practitioner management plan.
LOS	Length of stay.
Capture	Recording something once — by form, phone app, file or feed.
Posting button	An aqua button that writes rows to other tables from the record in front of you.
Posted · sealed	The record has been posted; the button is one-way and a second press writes nothing.
Calculated field (ƒ)	A read-only field the calculation engine keeps up to date.
Reference	The source record number carried on every row a button writes.

TERM	MEANING
Matching definition	The rule for pairing rows of two tables and what confirming writes.
Session (MAT…)	The record of one confirmed matching run.
Gateway	The server that checks every read and write against the rules for your group.

A Walk it once on the demo package

The Riverside package is installed with patients, appointments, results and the bed board in place on 19 August 2026.

Patient and reception

1. Patient app (liam.patterson@example.com): request an appointment.
2. In-tray: PR000031 → 📅 Book Appointment; the app shows the time.
3. Waiting Room: move Liam to Arrived.

Clinician

1. APT000015 → 🩺 Start Consult; write SOAP; 📞 Set Recall.
2. Observations: enter Noah's vitals; ADDS 5 escalates.
3. Results: review LAB000006 → 📞 Action Result.

Ward and billing

1. ADM000012 → 🏠 Discharge; print the summary.
2. MBC00001 → 📄 Generate Lines → 🏛️ Lodge → 💰 Record Payment.
3. Try to invoice VS000031 privately — refused. Matching; Trial Balance.

For the administrator

TASK	HOW
Deploy	Import the hospital package and the patient-app cluster; run the self-test.
Fee items	Load current MBS items and benefits; demo values are illustrative.
Schedules	Calculations every 5 minutes; recall attempts nightly.
Privacy	Restrict clinical groups; the patient app sees only the patient's own rows.