

CLINICIANLOOP

User Guide

How to register and use Clinician Loop — for Doctors & Therapists, and Clinic Admins

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1. For Doctors & Therapists

Step 1 — Register

1. Go to the Doctor Registration page.
2. Fill in your name, designation, speciality, workplace, city, degree, department, email, and a password.
3. Choose whether you are registering as a Clinic Admin (if you'll be managing other doctors under your clinic) or as a regular Doctor.
4. Upload a profile photo (optional, but recommended — it shows on your public clinic listing).
5. Select your clinic from the dropdown, or choose "+ Add New Clinic" if your clinic isn't listed yet, and provide its name and booking phone number.
6. Submit. You'll see a confirmation message — your account is now pending admin approval.

Note: You won't be able to log in until an administrator approves your registration. This usually happens once your details are verified.

Step 2 — Log in and find your dashboard

Once approved, log in from the site's login page. You'll land on (or can navigate to) your Doctor Dashboard, which shows:

- Total patients assigned to you
- Total bookings
- Total session notes you've recorded
- Your 5 most recent patients
- Your personal Client Form Link — see below

Step 3 — Share your Client Form Link

Every doctor has a unique registration link for new patients. You can find and copy it from your Dashboard or from the Doctors & Clinics / Doctor List pages (look for "Client Form Link" with a Copy button next to your name).

Send this link to a new patient by WhatsApp, email, or SMS. When they fill it in, they're automatically linked to you — no manual setup needed on your side.

Step 4 — View and manage your patients

1. Go to Patient Details in the main menu to see your full patient list.
2. Click into any patient to open their Client Detail page, which has three tabs:
 - About — their basic info and intake form answers
 - Appointments — their booking history
 - Client's Notes — all session notes recorded for them, and a place to recommend another therapist if needed

Step 5 — Add a session note

From a patient's detail page, use Add Note to record a session:

1. Give the note a short title.
2. Tick one or more categories that describe the session (e.g. Adults, Children, Counselling — whatever categories apply).
3. Write your note content.
4. Optionally attach a file (e.g. a scanned document or report).
5. Set the patient's next visit date, if scheduled.
6. Save. The note is timestamped and attributed to you automatically, and shows up in the patient's Client's Notes tab.

Step 6 — Add an appointment

There's no online self-booking for patients — this is for recording an appointment you've already agreed with the patient directly (phone/WhatsApp), or one your clinic admin has arranged.

1. Go to Book Appointment in the main menu.
2. Select the patient from the dropdown (only patients already assigned to you will appear).
3. Choose a date and time, and submit.
4. You can see all your upcoming and past bookings further down the same page, with their status (Pending, Approved, or Cancelled).

Step 7 — Keep your profile up to date

Go to My Profile to update your name, email, designation, speciality, degree, workplace, or city at any time.

Finding other doctors and clinics

The Clinics page shows every clinic on the platform grouped by city, with the doctors at each one. The Doctor List page gives you a similar view organized by doctor rather than clinic.

2. For Clinic Admins

A Clinic Admin is a doctor account with extra permissions to manage the other doctors registered under the same clinic. If you registered and selected "Yes" for "Is Clinic Admin?", this section is for you.

What's different from a regular doctor account

- Your site navigation is focused on clinic management: My Profile, Clinic Dashboard, Patient Details, Clinics, Book Appointment, Patient Registration, and Log Out.
- You can see and manage all patients belonging to doctors in your clinic, not just your own.
- You can approve, reject, or deactivate doctors registering under your clinic.

Approving a new doctor

1. When a new doctor registers under your clinic, their account sits as "Pending" until someone approves it.
2. Go to the doctor approvals area (an administrator will have access to the full wp-admin → Doctor Approvals screen; clinic admins approve from the relevant doctor listing page).
3. Review their details, then Approve or Reject.
4. Approving automatically generates their personal Client Form Link, so they can start registering patients right away.
5. If a doctor leaves or should no longer have access, use Deactivate instead of deleting them — this preserves their historical notes and patient records while blocking their login.

Managing your clinic's patients

Your Patient Details page automatically shows every patient belonging to any doctor in your clinic, not just one doctor's caseload — useful for overseeing the clinic as a whole.

Adding appointments on behalf of your clinic's doctors

Like a doctor, you can use Book Appointment to add an appointment record once a time has been agreed with a patient directly — there's no online self-booking for patients. As a Clinic Admin this covers patients across your whole clinic, not just one doctor's caseload.

For the site administrator (Shraddha)

As the overall site administrator, you have access to everything above for every clinic, plus two admin-only screens in wp-admin:

- Doctor Approvals (wp-admin → Doctor Approvals) — approve, reject, or deactivate any doctor on the platform, filterable by status.
- Directory (Not Signed Up) (wp-admin → Doctor Approvals → Directory) — add doctors you know about who haven't registered yet, so they appear on the public Clinics page with a Sign Up button.
- Resources (wp-admin → Resources) — add training videos, workshops, and podcasts that show up on the public Resources page.