



CASEBOOK • TRIAL RUN SOP
UNIFIED DIGITAL ECOSYSTEM

TRIAL RUN SOP · 14-DAY TRIAL ON YOUR OWN DATA

Casebook trial: the plan, and the walkthrough

This document is for the practice's trial owner and the ClinexGen trial lead. **Part A** is the 14-day trial plan: what the trial proves, who does what, the day-by-day plan, the test scenarios, how trial data is handled, and how the go / no-go is decided. **Part B** is the functional walkthrough the users follow, step by step, with a checkpoint for every step.

Duration 14 days, on a masked sample of your own data		Edition exercised Professional: several doctors, one clinic		Scope 1 trial clinic, 2 doctors, 1 locum, 6 TRIAL patients		Walkthrough 39 checkpoints in 6 stages, about one working day	
0.x	M.x	1.x	2.x	3.x	4.x		
Set-up checks		Data migration		Initiation		Execution	
4 checkpoints · 30 min		8 checkpoints · 2 h		5 checkpoints · 30 min		11 checkpoints · 1 h 45 min	
						Verification	
						5 checkpoints · 45 min	
						Sign-off	
						6 checkpoints · 30 min	

Part A · The trial plan

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Part B · The functional walkthrough

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- **B2** The whole run on one page
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- **B4** Troubleshooting · **B5** Daily check-in record
- **LOG** Issue log

Times are planned times for one pass of the walkthrough: 6 hours in all, 2 of them data migration; about one working day.

Marking a checkpoint

Pass	Casebook did what the step expects.
Fail	It did something else. Write what you saw.
Blocked	The step couldn't run, for example after an earlier failure. Write the reason.
Skip	Not run on purpose, for one of three reasons only: an Enterprise-only step on a Professional trial (4.4), the four In delivery items (4.6), or the reversal on a Standard trial (2.8). Say which.
No other step is skipped by design. Copy every Fail and Blocked onto the issue log.	

Before you start

Built from the Casebook brochure, flyer, deck and process flowchart of October 2026. Capability status is as at 2 September 2026; the ClinexGen trial lead re-checks it with the product team before day 1. Screen and button names in the trial build may differ: confirm them on the trial workspace once, and note any difference on the issue log as Low.

The trial workspace address comes from the ClinexGen trial lead. Write it here: _____

THE 14 DAYS AT A GLANCE

Before day 1	Days 1–2	Days 3–4	Day 5	Days 6–11	Days 12–14
Kickoff	Set-up checks	Data migration	Training by role	Run and verify	Baseline, go / no-go
Scope, users, prerequisites (A2)	Workspace, masters, layouts · 0.x	Masked sample, signed off · M.x	Every user signed in	Clinic days, reports, checks · 1.x–3.x	Measures, sign-off · 4.x, A9

PART A

The 14-day trial plan

For the practice's trial owner and the ClinexGen trial lead

A1 Purpose and scope

What the trial proves, on which edition, for which people, and for how long.

The trial shows, on a masked sample of your own records, that Casebook does six things in your practice: **every visit is filed under the treating doctor**, with an MRD number and an ICD code; **the last visit is already on screen** when the doctor opens the patient; **prescriptions come from each doctor's own favourites and templates**; **a test ordered once reaches the lab queue and the bill**, and its result is filed to the visit that ordered it; **next-visit dates become a follow-up list**; and **each role sees only what it should**. It also records the baseline for the four measures in A7.

ITEM	FOR THIS TRIAL
Duration	14 days, from day 1 (set-up checks) to day 14 (go / no-go). The functional walkthrough itself (Part B) takes about one working day.
Edition	Professional: several doctors in one clinic, with financial reporting, and reversals and corrections. For an Enterprise trial, run 4.4 as well. For a Standard trial (one doctor), Doctor A also runs Doctor B's steps, and the reversal in 2.8 is marked Skip.
Clinic	One trial clinic, TRIAL Clinic Chennai, with MRD numbering set. An Enterprise trial adds a second clinic in 4.4.
People	Two doctors, a locum, one user each for the front desk, the lab and records, and the owner as administrator: seven trial logins (B1).
Records	Six made-up TRIAL patients, two with a past visit (B1); a masked sample of 50 patients and the full service list for the migration test.
Out of scope	The four In delivery items, marked Skip in 4.6 and not tested: ABHA / ABDM linking, the practice revenue dashboard, revenue by doctor and service, and the doctor and patient apps. Also in-patient beds (that is Nucleus), WhatsApp messages to real numbers, real records for go-live, and links to other systems.

A2 Before day 1: prerequisites

Ticked off at the kickoff, before set-up starts.

The practice provides

- A named **trial owner** who can decide forms, services and rights
- A named user for each trial role (A3), with an email or mobile for the login
- A desktop or laptop for each role, with a current browser, and one printer for prescriptions, the OPD summary, certificates and receipts
- Your forms and masters: the case sheet, prescription and OPD summary layouts, one certificate, the service list, and each doctor's slot rules and drug favourites
- A masked sample: 50 patients and the full service list, with source totals signed by the trial owner; and one test mobile number for the WhatsApp list
- Written approval before any real personal data is used (A6)

ClinexGen provides

- The trial workspace, served over HTTPS, on our cloud in India or the practice's own server, as agreed
- A named account for each trial user, with rights set per screen and per action
- Masters configured from your files: services, doctors and slots, one specialty case sheet, and the print layouts
- The six TRIAL patients and the three TRIAL lab tests (B1)
- The mapping sheet for the masked sample
- A named **trial lead** and **delivery engineer**, and the support desk contact

A3 Roles and RACI

Who does what. R responsible · A accountable · C consulted · I informed.

ROLE	WHO	IN THE TRIAL
Client sponsor	Owner or lead doctor	Approves scope and success criteria; makes the go / no-go decision and signs for the practice
Client trial owner	Practice manager or administrator	Runs the trial day to day; provides masters, forms and the masked sample; signs the migration off
Department users	Front desk, Doctor A, Doctor B, locum, lab, records	Run the walkthrough in Part B and log what they see

ROLE	WHO	IN THE TRIAL
ClinexGen trial lead	Named at the kickoff	Plans and leads the trial; runs the daily check-in; owns the issue log; signs for ClinexGen
ClinexGen delivery engineer	Named at the kickoff	Configures the workspace; loads and reconciles the sample; fixes and retests
ClinexGen support desk	info@clinexgen.com · +91 7338 786 196	Records every issue and routes it by severity (A8)

ACTIVITY	SPONSOR	TRIAL OWNER	USERS	TRIAL LEAD	ENGINEER	SUPPORT
Agree scope, edition and success criteria	A	R	I	R	C	–
Provide forms, masters and the masked sample	I	A, R	C	C	C	–
Configure the workspace and accounts	I	C	–	A	R	–
Migrate and reconcile the sample (M.1–M.8)	I	A	–	C	R	–
Train users by role	I	C	R	A	R	–
Run the walkthrough (Part B)	I	A	R	C	C	–
Log issues; fix and retest	I	C	R	A	R	R
Daily check-in	–	R	C	A, R	C	–
Data handling and deletion (A6)	A	R	I	C	R	–
Go / no-go and sign-off (A9)	A	R	I	R	C	–

A4 Day-by-day plan

Fourteen days, grouped. Every day ends with a 15-minute check-in led by the ClinexGen trial lead, and the issue log is brought up to date.

DAYS	WHAT HAPPENS	PART B	LED BY	DONE WHEN
Before day 1	Kickoff: scope, users, dates and success criteria agreed; prerequisites (A2) checked	–	Trial lead, trial owner	A2 ticked off
Days 1–2	Workspace, accounts and masters confirmed; slot rules, rights, the specialty case sheet and print layouts set	0.1–0.4	Delivery engineer	Set-up checks marked
Days 3–4	Masked sample extracted, mapped, loaded, reconciled, reloaded and signed off	M.1–M.8	Delivery engineer; trial owner signs	Migration signed off
Day 5	Training by role: front desk, doctors and locum, lab, records	–	Trial lead	Every user signed in and trained
Days 6–9	Clinic days: scenarios S1–S6 run end to end, with the day's reports run at the end of each day	1.1–2.11	Department users	Each step marked; issues logged
Days 10–11	Verification: doctor-wise filing, reports, the typed-once check, access and the audit trail; fixes retested	3.1–3.5	Trial owner, trial lead	Verification steps marked
Days 12–13	Follow-up list, each doctor's review and the baseline measures; the Enterprise step; open issues closed or given an owner	4.1–4.6	Trial owner	Baseline written; issue log current
Day 14	Go / no-go meeting; the decision on trial data (delete, or carry into go-live); sign-off by both parties	–	Sponsor, trial lead	A9 signed

A5 Test scenarios

Each scenario maps to the Part B steps that run it, with the result expected and the criterion for a Pass.

#	SCENARIO	PART B	EXPECTED RESULT	PASS CRITERION
S1	Returning patient, last visit on screen	1.1, 2.1	Found by name and by mobile; past visits, prescriptions and reports on the same screen	Found on the first search; nothing re-entered
S2	New patient and appointment	1.2–1.5	Registered once; booked to the doctor's slot rules with a token; a reschedule frees the old slot	No duplicate on the repeat search; tokens in order

#	SCENARIO	PART B	EXPECTED RESULT	PASS CRITERION
S3	Consultation with a test (Doctor A, Patient Five)	2.1, 2.2, 2.4–2.6, 3.3	Prescription from favourites; Test A in the lab queue and on the bill; result filed to the visit that ordered it	Same test, same visit, entered once; result on the right visit
S4	Consultation with no test (Doctor B, Patient One)	2.3, 2.6	Case sheet and prescription; nothing sent to the lab queue	Visit filed under Doctor B; bill shows the consultation only
S5	Bill, part payment and reversal	2.6–2.8	A discount applied; a balance kept on the part-paid bill; one item reversed	Balance on the revenue report; reversal shows who and when
S6	Handover and documents	2.9–2.11	Receipt and OPD summary in the format your doctors sign, with the next-visit date; certificate and attachments on the visit	Each patient leaves with the summary and the next date
S7	Doctor-wise filing	3.1	Every visit under the treating doctor, with an MRD number and an ICD code	No visit filed under the wrong doctor
S8	Reports	3.2	The six reports run by date range, and one exports	All six run; figures match the trial day
S9	Access by role	0.2, 3.4	Screens outside the role are refused for the locum and for Doctor B	Every attempt refused
S10	Audit trail and follow-ups	3.5, 4.1	Who and when on every clinical entry; next-visit dates due listed by doctor	Entries and the reversal logged; both next-visit dates on the list
S11	Data migration	M.1–M.8	The masked sample loads, reconciles and reloads	Counts equal the source; ten of ten spot checks match; the reload repeats them
S12	Enterprise only	4.4	A second clinic on the same system	Each clinic's data kept separate (Skip on Professional)

A6 Data handling and privacy

Under India's Digital Personal Data Protection Act, 2023.

- **The practice is the data fiduciary.** ClinexGen processes trial data only to run this trial.
- The walkthrough uses made-up **TRIAL** patients. The migration test uses a masked sample: names, mobile numbers and ID numbers are replaced before the file leaves the practice.
- Real personal data is used only with the practice's written approval, and then only as a masked sample. By approving, the practice confirms it has a lawful basis under the Act, such as its patients' consent, to use that sample for the trial.
- Access is limited to the named trial users in A3. Their accounts are switched off when the trial ends.
- The WhatsApp appointment list goes to the test number only, never to a patient.
- Amounts on trial bills are made-up test values for easy arithmetic, not ClinexGen or clinic rates.
- After the go / no-go, trial data is **deleted within 30 days** and ClinexGen confirms it in writing, or **carried into go-live** if the practice signs for it in A9.
- Never write a password in a note or on the issue log.

A7 Success and exit criteria

Tick Met when the target is reached. No time-saved or payback figure is quoted: the practice measures its own.

#	KPI	TARGET	MET?
1	Coverage	Every checkpoint in Part B marked Pass, Fail, Blocked or Skip, with the reason for each Skip	☐ Yes ☐ No
2	Typed once	Every test ordered reaches the lab queue and the bill without re-entry (3.3)	☐ Yes ☐ No
3	Doctor-wise filing	Every visit filed under the treating doctor, with MRD and ICD (3.1)	☐ Yes ☐ No
4	Results to the right visit	Every lab result filed to the visit that ordered it (2.5)	☐ Yes ☐ No
5	Patient handover	Every patient leaves with receipt, OPD summary and next-visit date (2.9)	☐ Yes ☐ No
6	Reports	All six reports run for the trial day and export (3.2)	☐ Yes ☐ No
7	Access	The locum and the second doctor see only what their rights allow (3.4 Pass)	☐ Yes ☐ No
8	Traceability	Audit trail on every clinical entry (3.5)	☐ Yes ☐ No
9	Baseline measures recorded	Patients seen per session · minutes per routine follow-up · share of follow-ups who return · minutes to close the day's cash (4.3)	☐ Yes ☐ No

#	KPI	TARGET	MET?
10	Migration completeness	Loaded plus rejected rows equal the extract; every reject explained	☐ Yes ☐ No
11	Migration accuracy	Every count and total equals the source; ten of ten spot checks match	☐ Yes ☐ No
12	Repeatable load	The reload gives the same counts and totals, with no duplicates	☐ Yes ☐ No
13	Migration signed off	The trial owner signs before the run continues (M.8)	☐ Yes ☐ No

Go when all thirteen KPIs are met. **Conditional go** when KPIs 2, 3 and 7 (typed once, doctor-wise filing and access) are met and every other open item is named in A9 with an owner and a date. **No-go** when KPI 2, 3 or 7 is not met, when 3.4 fails, or when an open item has no owner.

A8 Issues and escalation

Every Fail and Blocked goes on the issue log with a severity. The Casebook kit publishes no response times; any you need are set out in your proposal.

SEVERITY	FOR EXAMPLE	HANDLED BY	WHAT HAPPENS NEXT
Critical	The trial cannot continue, or a role sees what it should not (3.4 Fail)	Delivery engineer with the trial lead; the client trial owner is told at once	The affected steps stop until it is fixed and retested
High	A scenario fails and there is no way round it	Delivery engineer	Fixed and retested within the trial
Medium	A scenario fails but there is a way round it	Delivery engineer	Fixed, or carried into A9 with an owner and a date
Low	Wording, layout or a screen-name difference	Trial lead logs it	Listed for the product team

Escalation. A department user raises the issue with the **client trial owner**, who logs it with the **ClinexGen trial lead**. If a Critical or High issue is not moving by the next daily check-in, the trial owner escalates to the **ClinexGen support desk** (info@clinexgen.com · +91 7338 786 196), and the trial lead brings the **client sponsor** into that check-in.

A9 Go / no-go and sign-off

Decided on day 14, by the client sponsor and the ClinexGen trial lead together.

- ☐ **Go.** Every KPI in A7 is met. Go-live is planned from the proposal; week 1 starts when the proposal is signed.
- ☐ **Conditional go.** Go-live goes ahead with the open items below; each has an owner and a date.
- ☐ **No-go.** The trial stops; the reasons are recorded below, and trial data is deleted (A6).

#	OPEN ITEM OR REASON	OWNER	DUE DATE
1			
2			
3			
4			

- ☐ **Delete the trial data.** ClinexGen confirms the deletion in writing within 30 days.
- ☐ **Carry the trial data into go-live.** The practice approves this by signing below.

For the practice · client sponsor

Name _____

Signature _____

Date _____

For ClinexGen · trial lead

Name _____

Signature _____

Date _____

PART B

The functional walkthrough

For the department users and the trial owner: 39 checkpoints, about one working day

B1 Environment, logins, configuration and trial data

Set these up before the first checkpoint. The ground rules for data are in A6.

Environment. The trial address, served over HTTPS, and an owner (admin) login from the ClinexGen trial lead; our cloud in India or the practice's own server (note which); one browser window or profile per login, so sessions don't collide; a printer for the prescription, OPD summary, certificate and receipt layouts; and a results sheet with one row per checkpoint.

TRIAL LOGINS

LOGIN	ROLE	SEES AND DOES
trial.owner	Owner / admin	Masters, slot rules, rights per screen and per action, form builder, all reports
trial.desk	Front desk	Registration, appointments, tokens, check-in, billing
trial.drA	Doctor A	Case sheet, prescription, orders and certificates for Doctor A's patients
trial.drB	Doctor B	As Doctor A, for Doctor B's patients
trial.locum	Locum	Only the screens its role allows
trial.lab	Lab	Lab queue and results
trial.records	Records	MRD numbering, ICD coding, documents, reports, the follow-up list

CONFIGURATION BEFORE THE RUN

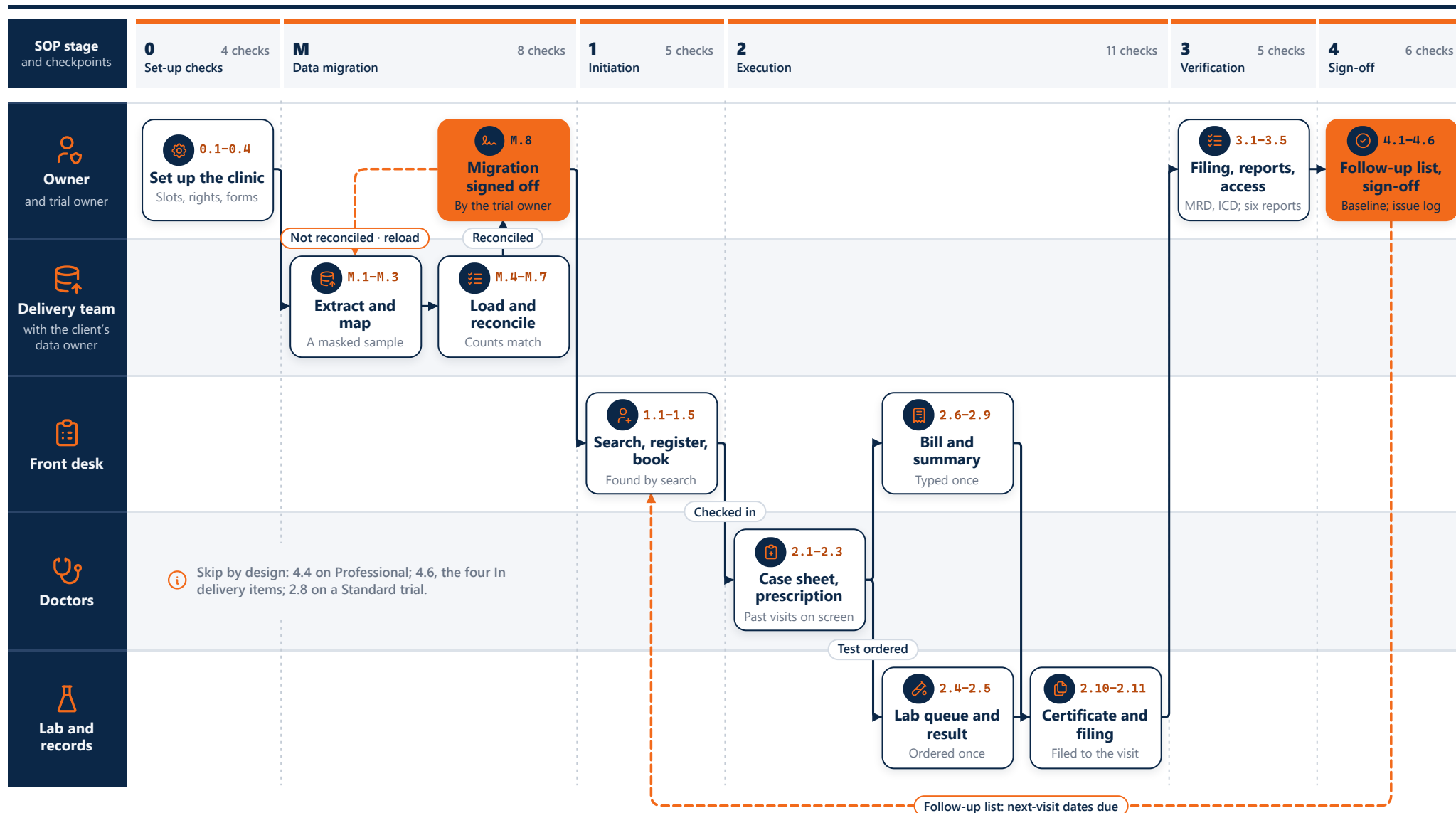
SETTING	VALUE FOR THE TRIAL
Clinic	TRIAL Clinic Chennai, with MRD numbering set
Doctors	Doctor A and Doctor B, each with slot rules and tokens
Service list	Consultation, follow-up and three lab tests (made-up test values)
Prescription	Drug favourites and one template for each doctor; investigation templates
Specialty case sheet	One specialty form from the form builder: fields, sections, validation, print layout
Print layouts	Prescription and OPD summary in the format your doctors sign; one certificate
Rights	Per screen and per action for each role; the locum role has the fewest screens
Messaging	WhatsApp appointment list pointed at the test number only

TRIAL DATA SET

RECORD	NAME	PATH
New patient	TRIAL Patient One	Registered in 1.2; Doctor B, no test (2.3); part payment (2.7)
New patients	TRIAL Patients Two to Four	Registered in 1.2; booked, given tokens and checked in (1.3); one rescheduled (1.4)
Returning patient	TRIAL Patient Five	Has a past visit; found in 1.1; Doctor A, with Test A (2.1, 2.2, 2.5)
Returning patient	TRIAL Patient Six	Has a past visit; found by mobile in 1.1
Referring doctor	TRIAL Referring Doctor	Recorded at registration (1.2)
Lab tests	TRIAL Tests A, B and C	Test A ordered in 2.2; B and C set up in the service list

B2 The whole run on one page: set-up to sign-off, with data migration

Each box is a group of Part B steps, done by its lane; the numbers are the steps that test it. Orange marks a sign-off by someone other than the person doing the work. Dashed lines are the fix-and-reload loop and the follow-up list.



Data migration (M) comes before the run

B3 Step cards

Mark every checkpoint. Copy each Fail and Blocked onto the issue log, with a severity (A8).

0.x Set-up checks Before the first patient or bill: the workspace, masters, roles and print layouts.

4 checkpoints · 30 min

0.1 Owner

Sign in over HTTPS; open masters, rights, the service list and reports

CHECKPOINT Every screen opens without an error

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

0.2 Owner

Set each doctor's slot rules; set rights per screen and per action for each role

CHECKPOINT Saved; the locum role has the fewest screens

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

0.3 Owner

Build one specialty case sheet in the form builder: a field, a section, a validation rule, a print layout

CHECKPOINT New field usable without a software release

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

0.4 Owner

Check the prescription, OPD summary and certificate print layouts

CHECKPOINT Each prints in the format the doctors sign

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.x Data migration A masked sample, loaded, reconciled, reloaded and signed off.

8 checkpoints · 2 h

M.1 Trial owner

Agree the scope: the patient list and service masters from the current system or register, the cut-off date, and the totals to reconcile against

CHECKPOINT Scope noted: source, row counts, cut-off date, source totals

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.2 Delivery team

Extract a sample of 50 patients and the full service list from the source; mask names, mobile numbers and ID numbers

CHECKPOINT Extract has the agreed rows; nothing identifies a real person

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.3 Delivery team

Map each source column to a Casebook field in a mapping sheet; fix date formats, codes, mobile numbers and duplicates

CHECKPOINT Every source column mapped, or marked not migrated

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.4 Delivery team

Load the sample into the trial workspace by the route agreed for the site (import file or delivery-team load); count loaded and rejected rows

CHECKPOINT Loaded plus rejected equals the extract; each reject explained

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.5 Delivery team

Reconcile: patient count; service count and service names

CHECKPOINT Every count and total equals the source

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.6 Front desk

Spot-check ten migrated records: search each by name and by mobile at the front desk and open the record

CHECKPOINT All ten match the source

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.7 Delivery team

Remove or switch off the loaded sample, then load it again

CHECKPOINT Same counts and totals the second time; no duplicates

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

M.8 Trial owner

Sign off the migration; agree the plan for loading real records at go-live

CHECKPOINT Signed; the run continues on the migrated records

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

1.x Initiation The trial patients enter the system and reach the doctors.

5 checkpoints · 30 min

1.1 Front desk

Search for TRIAL Patients Five and Six by name and by mobile

CHECKPOINT Found; past visit visible

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

1.2 Front desk

Register TRIAL Patients One to Four with ID proof, contact and referring doctor; then search for Patient One again

CHECKPOINT Four records; no duplicate on the repeat search

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

1.3 Front desk

Book slots: Patient Five with Doctor A, Patient One with Doctor B, the rest with either doctor; issue tokens; check patients in

CHECKPOINT Slot rules respected; tokens in order

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

1.4 Front desk

Reschedule one appointment

CHECKPOINT New slot saved; old slot freed

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

1.5 Front desk

Send the day's appointment list on WhatsApp to the test number

CHECKPOINT List arrives at the test number only

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.x Execution The main flow: two consultations, the lab, the bills and what the patient takes home.

11 checkpoints · 1 h 45 min

2.1 Doctor A

Open TRIAL Patient Five, checked in: complaints, history, allergies, vitals, examination, diagnosis

CHECKPOINT Previous visits, prescriptions and reports on the same screen

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.2 Doctor A

Prescribe from favourites: dose, frequency, duration; add advice and a next-visit date; order TRIAL Test A

CHECKPOINT Prescription prints or shares

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.3 Doctor B

Case sheet and prescription for TRIAL Patient One, with a next-visit date and no test ordered

CHECKPOINT Visit filed under Doctor B; nothing sent to the lab queue

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.4 Lab

Open the lab queue

CHECKPOINT Test A is there without being retyped

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.5 Lab

Enter the result for Test A

CHECKPOINT Result filed to Patient Five's visit, the one that ordered it

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.6 Front desk

Bill both visits; apply one discount

CHECKPOINT Test A is on Patient Five's bill, typed once; Patient One's bill shows the consultation only

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.7 Front desk

Take a part payment on Patient One's bill (made-up test values)

CHECKPOINT The balance is kept against Patient One

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.8 Front desk

Reverse one bill item

Skip on a Standard trial: reversals and corrections come with Professional.

CHECKPOINT Reversal recorded with who and when

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.9 Front desk

Print each receipt and OPD summary, with the next-visit date

CHECKPOINT Each patient leaves with the summary and the next date

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.10 Doctor A

Issue one medical or fitness certificate

CHECKPOINT Certificate filed to the visit

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

2.11 Records

Attach a scan and a consent form to a visit

CHECKPOINT Both appear on the visit

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note _____

3.x Verification Filing, reports, links, access and the audit trail, checked against what the trial created.

5 checkpoints · 45 min

3.1 Records

Check each visit's MRD number and ICD code

CHECKPOINT Every visit filed under the treating doctor

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note _____

3.2 Records

Run the Appointment, Revenue, Daily summary, Medicine, Lab and Patient reports for the trial day; export one

CHECKPOINT All six run and export; the revenue report shows Patient One's balance

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note _____

3.3 Records

Compare the lab order, the lab queue and the bill for Test A

CHECKPOINT Same test, same visit, entered once

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note _____

3.4 Locum / Doctor B

Try to open a screen outside the role

CHECKPOINT Refused, every time

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note _____

3.5 Owner

Read the audit trail for 2.1, 2.2 and 2.8

CHECKPOINT Every clinical entry, and the reversal, shows who and when

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note _____

4.x Sign-off

The closing steps, the baseline measures and the issue log.

6 checkpoints · 30 min

4.1 Records

Open the follow-up list

CHECKPOINT The next-visit dates from 2.2 and 2.3 are listed, by doctor

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

4.2 Doctors

Each doctor reviews their own case sheets for the day

CHECKPOINT Each doctor signs off their record

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

4.3 Trial owner

Record the four baseline measures (A7, KPI 9)

CHECKPOINT Baseline written down

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

4.4 Owner

Enterprise trials only: add a second clinic, and register one patient there

Skip on a Professional trial.

CHECKPOINT Each clinic's data kept separate

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

4.5 Owner

Send the issue log to the ClinexGen trial lead; record in A9 whether trial data is deleted or carried into go-live

CHECKPOINT Issue log sent; data decision recorded in A9

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

4.6 Any

In delivery: ABHA / ABDM linking, the practice revenue dashboard, revenue by doctor and service, the doctor and patient apps

Skip, with the note "In delivery". Never mark these Fail.

CHECKPOINT Not tested in this trial

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B4 Troubleshooting

Anticipated issues and the first thing to do.

SYMPTOM	LIKELY CAUSE	IMMEDIATE ACTION
Same patient registered twice	Search skipped at the desk	Always search by name and mobile first (1.1); log the duplicate

SYMPTOM	LIKELY CAUSE	IMMEDIATE ACTION
Slot not offered	Doctor's slot rules not set for the day	Set the slot rules (0.2); rebook
Test ordered but not in the lab queue	Service not set up as a lab test	Mark the service as a lab test in the service list; re-order
Bill misses the test	Order and bill not linked for that service	Mark 2.6 Fail (KPI 2, typed once); don't add the test by hand
Result filed to the wrong visit	Result entered against a new visit instead of the order	Enter results only from the lab queue item
Balance missing on the revenue report	Receipt taken for the full amount of the bill	Check the receipt against the bill, correct it, and run the report again (3.2)
Reversal not offered	The trial is on Standard, or the role lacks the right	On Standard, mark 2.8 Skip; otherwise grant the right to the front-desk role and retry
Printout layout wrong	Print layout not set in the form builder	Fix the layout (0.4) and reprint
WhatsApp list not received	Test number not set, or the messaging integration not configured	Check the number and the integration; mark Blocked if not configured
ABHA linking fails, or revenue is not split by doctor	Both are In delivery: the ABDM gateway is pending	Skip under 4.6 with "In delivery"; don't log it as a defect
Locum can open records outside the role	Rights too wide	Mark 3.4 Fail; log it as Critical and tell the ClinexGen trial lead at once (A8); fix the rights and retest
Duplicate MRD numbers	MRD numbering series not set	Set the series; re-file the visits
Rows rejected for dates	Source dates in a different format	Fix the format rule in the mapping sheet; load again
Mobile numbers rejected or merged	Country code or spaces, or one number shared by a family	Store ten digits; keep shared numbers and check how duplicates are flagged
Totals don't reconcile	Totals taken at a different cut-off, or rows rejected without notice	Take the totals and the extract at the same cut-off; count every reject
Records doubled after the reload	The first sample wasn't removed, or the load can't be repeated	Remove or switch off the sample first; mark Fail if the load can't be repeated
Text garbled after the load	Extract not saved as UTF-8	Save the file as UTF-8 and load again
Legacy IDs clash with numbering	Migrated IDs overlap Casebook's own numbering series	Keep the legacy ID in a reference field; let Casebook number new records

B5 Daily check-in record

Filled in at the end-of-day check-in (A4). One line a day.

DAY	DATE	STEPS RUN	ISSUES OPENED	ISSUES CLOSED	TRIAL OWNER	TRIAL LEAD
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

Copy every Fail and Blocked here, with its severity (A8). Open items at day 14 carry into A9.

Logged by	Role	Date
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