Tasks:	Visit Creation, Check-In & Visit Type Assignment
Objective:	To ensure patient visits are created correctly, patients are checked in properly, and the appropriate visit type is assigned.
Who:	Receptionist / Front Desk Staff
Required Materials:	Patient information
Version:	
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Last Updated:	January 21, 2026

Key Concepts:

Visit and Encounter

 Visit: A visit represents the overall period during which a patient is present at a health facility or receiving care. It starts at check-in and ends when care is completed.
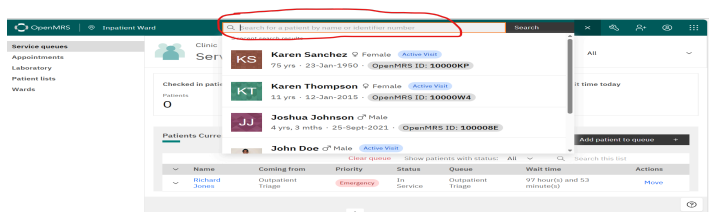
 Encounter: An encounter is a specific interaction between a patient and a healthcare provider during a visit, such as triage or consultation.
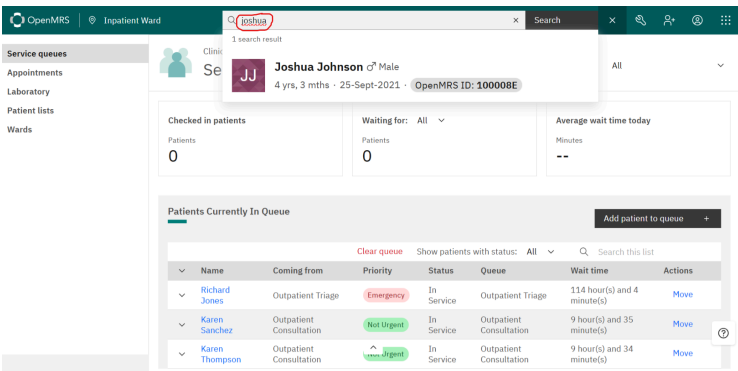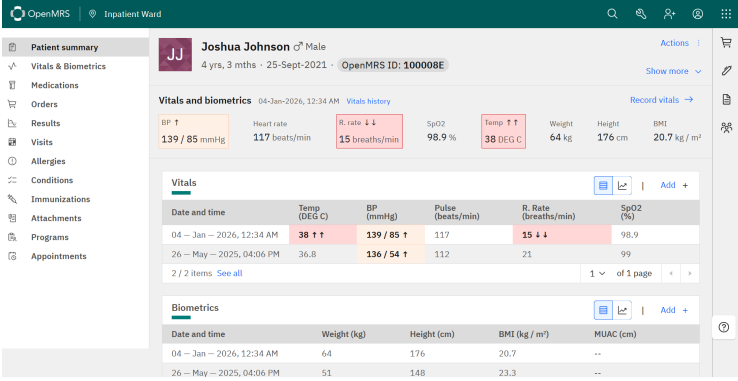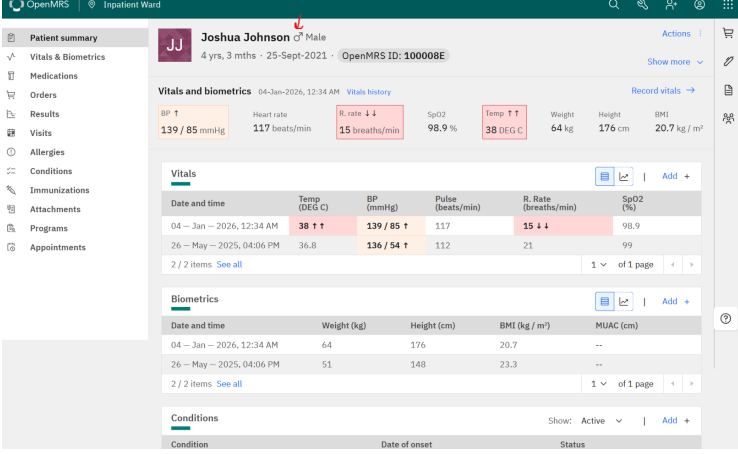
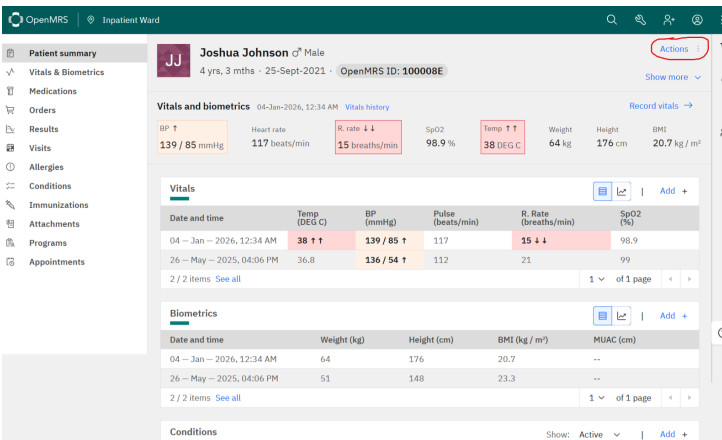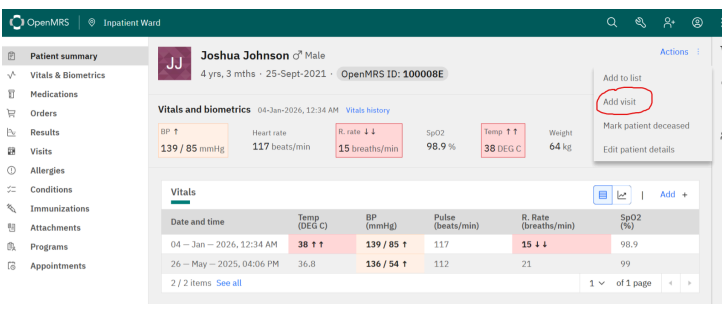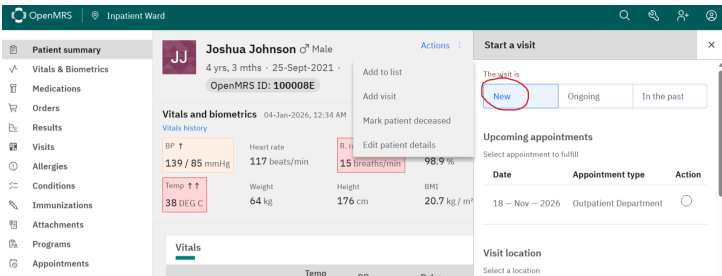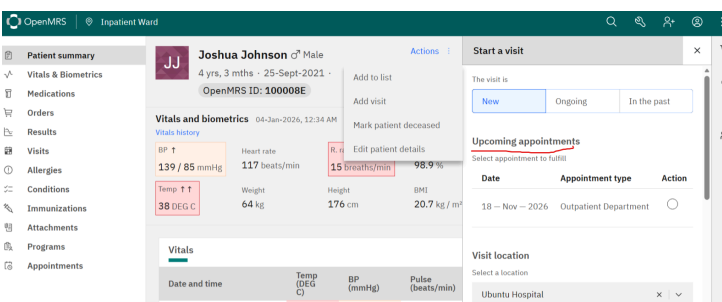Difference: A visit can contain multiple encounters. Visits track presence; encounters track interactions.

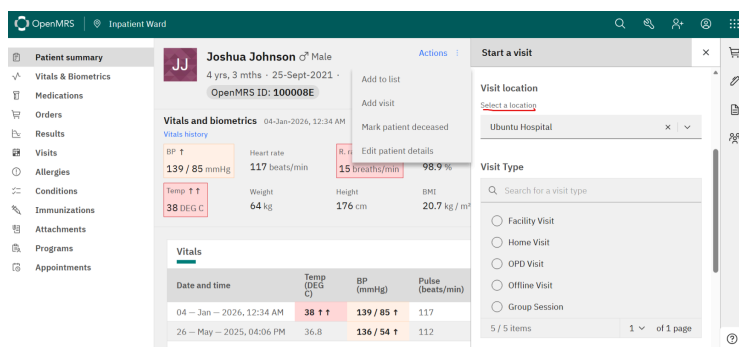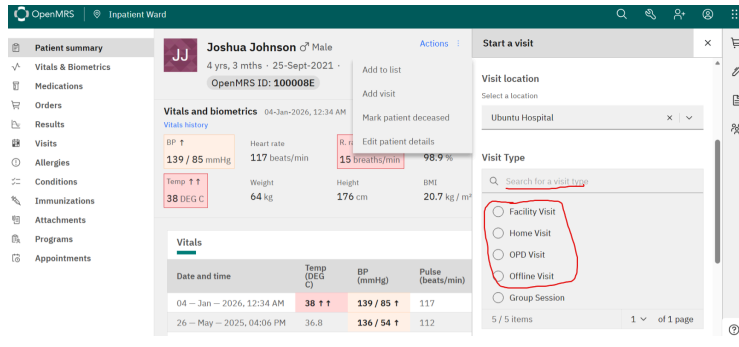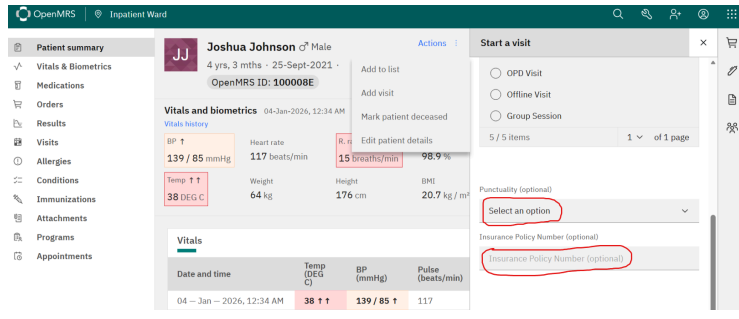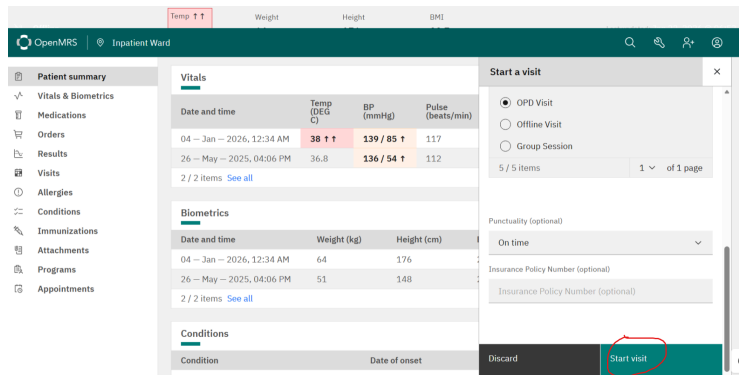**Who Can Start and End Visits**

Receptionists or front desk staff start visits during patient check-in. Authorized staff may end visits once all services are completed.
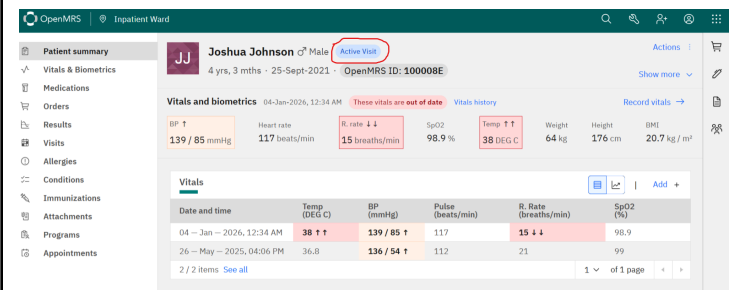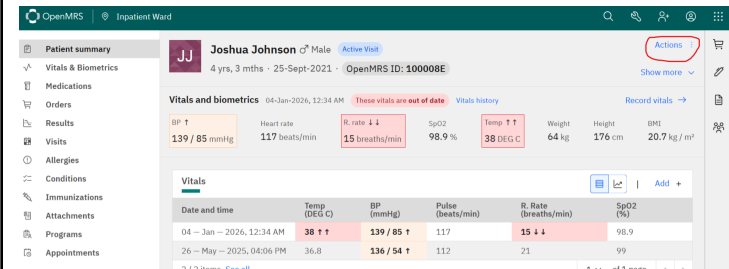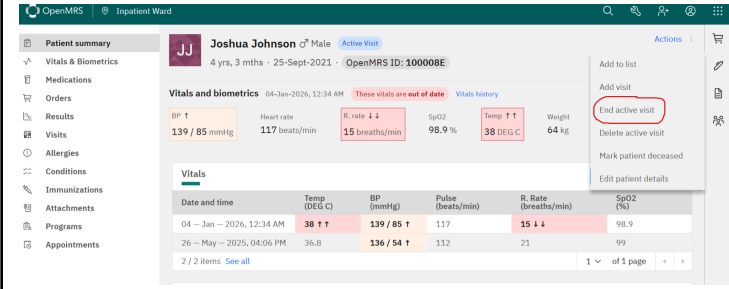
Creating visits
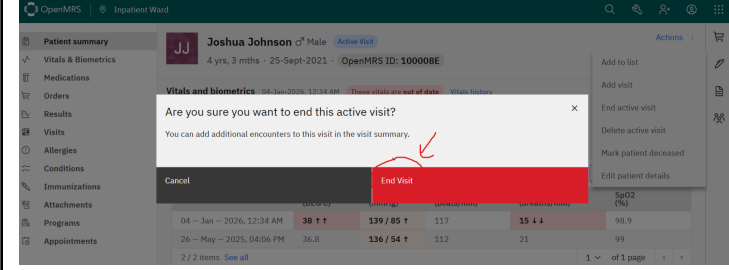
Step	Action	Screen Shots
Search Patient	Search the patient by name, ID, or phone number.	

Select Patient	Select the correct patient from the results.	
Open Dashboard	Open the patient dashboard.	
Review Patient Status	Review patient status and confirm no active visit exists.	
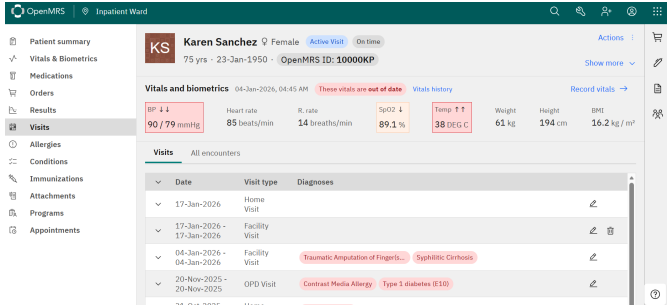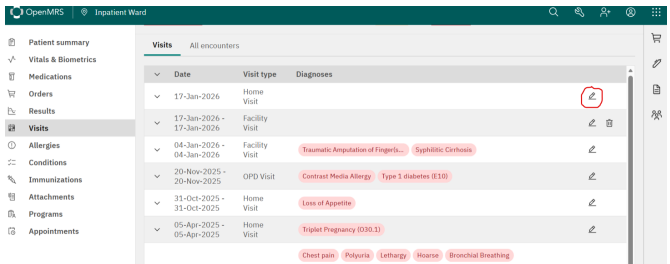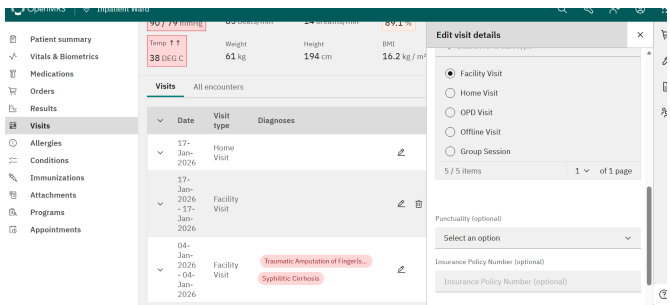
Open Actions	Click the **Actions** menu on the patient dashboard.	
Add Visit	Select **Add Visit** from the actions list.	
Select Visit Status	Choose visit status (New, Ongoing, or In the past). For patient check-in, select New.	
Confirm Appointment (If Any)	Confirm appointment if shown	

Select Visit Location	Select the facility where the patient is physically present (e.g., hospital, clinic, health center).	
Assign Visit Type	Select the appropriate visit type (e.g., OPD Visit, Facility Visit, Home Visit, Offline Visit, Group Session). This determines downstream clinical workflows and notifications.	
Enter Optional Visit Details	Fill in optional fields based on organizational policy.	
Start Visit (Check-In)	Click **Start visit** to officially check the patient in and activate the visit.	

Ending an Active Visit

Step	Action	Screen Shots
Confirm Active Visit	Check that a visit is currently active.	
Open Actions Menu	Use the Actions menu to manage the visit.	
End Visit	Select the option to close the visit.	
Confirm Visit End	Click the end visit button	

Correcting a Visit by Editing a Visit

Step	Action	Screen Shots
Open Patient Dashboard	Access the patient's dashboard.	
Edit Visit	Open the visit for editing.	
Update Visit Details	Correct the visit type or other incorrect details.	
Save Changes	Click the update visit button.	