

OpenEMR Users Guide

Based on Version 3.1.0

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Getting Started

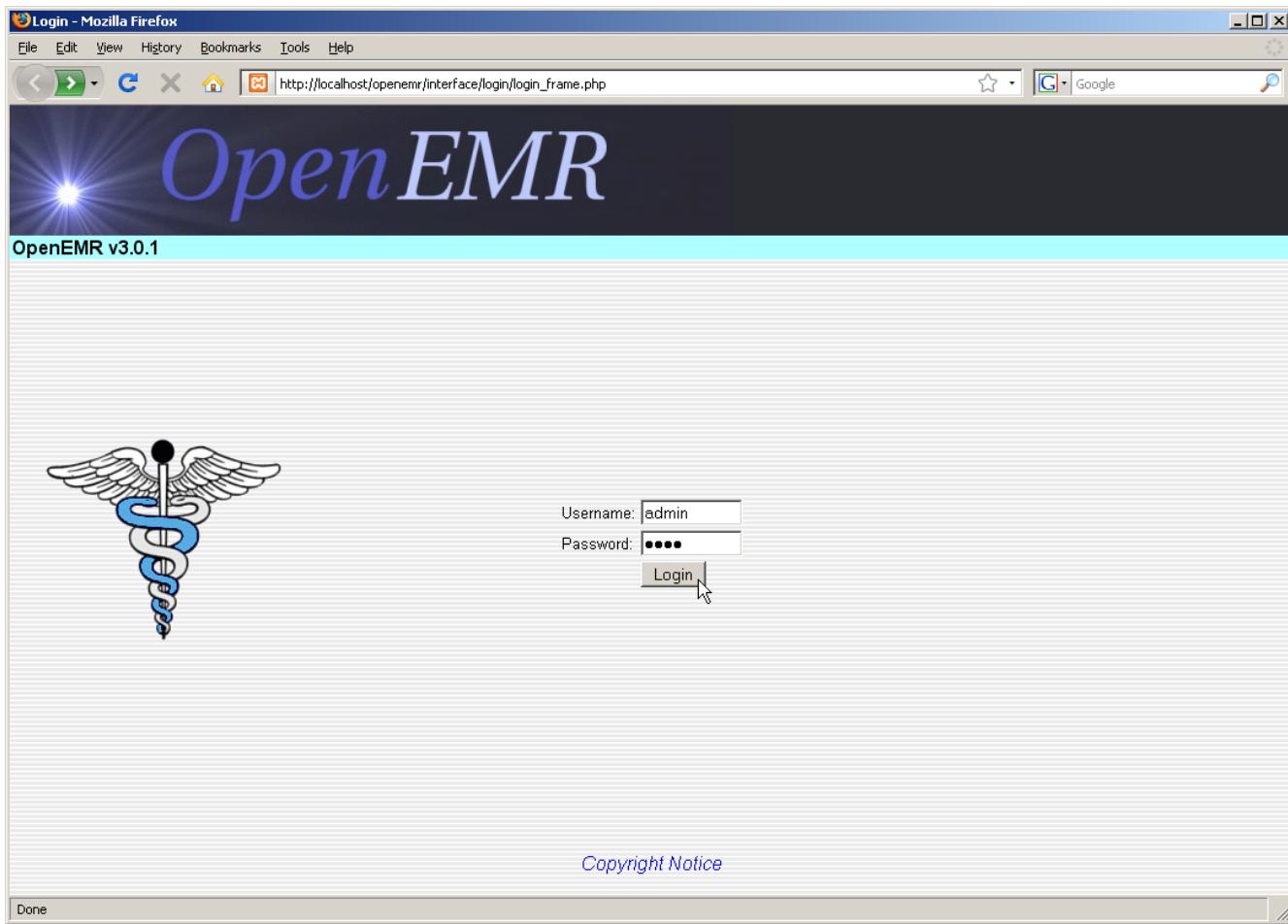
Getting to the Login Page

In your browser's address bar you will need to enter the location of your OpenEMR installation. For most users this address will consist of the name of your server followed by a forward leaning slash, "openemr" and another forward leaning slash. This should look like this:

http://MyServerName/openemr/

Be sure to check with your Administrator, as the location of your OpenEMR installation may be different. As an example the OpenEMR live demo is located at: <http://www.oemr.org/demo/openemr/>

Once you have entered the correct address, you should be presented with the login screen:



Logging In

The login screen contains two input boxes: Username and Password. The first time you log in to a fresh installation of OpenEMR you will need to log in as "admin" with a password of "pass". Your administrator may provide with a your own username and password. (Note that the OpenEMR login is case-sensitive.) Once you have entered the correct username and password, simply click the 'Login' button or press 'Enter'.

Changing Passwords

If this is your first time logging in to OpenEMR it is recommended that you change your password to something more secure. To do this select 'Password' from the navigation list on the left, found under 'Miscellaneous' in the Tree View navigation scheme.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main content area is titled "Password Change". It displays a message: "Once you change your password, you will have to re-login." Below this are three input fields: "Real Name:" (set to "admin"), "Username:" (set to "admin"), and two "Password:" fields, both containing "*****". A "Save Changes" button is located below the password fields. On the left side, there is a vertical navigation menu with various icons and labels, including "Top", "Bot", "Calendar", "Password", "Admin", "Reports", "Ofc Notes", "Fax/Scan", "Addr Blk", "Chart Trk", "Billing", "Superbill", "Auth/notes", "New Pt", "Patient", "History", "Encounters", "New Enctr", "Rx", "Issues", "Immunize", "Documents", "Pt Report", "Pt Notes", "Transact", "Summary", "Encounter", and "Charges". At the bottom of the left sidebar, there are buttons for "Popups", "Logout", and "Done". The top right corner of the main window shows "Active Patient: None" and the date "April 22, 2009".

This will bring up the “Password Change” screen. Enter your new password into the two input boxes, make sure you type the same thing into each box. And remember that OpenEMR's username and passwords are case sensitive!

Once you've done this, click the 'Save Changes' button. You will then be required to login again with your new password.

Main Screen & Navigation

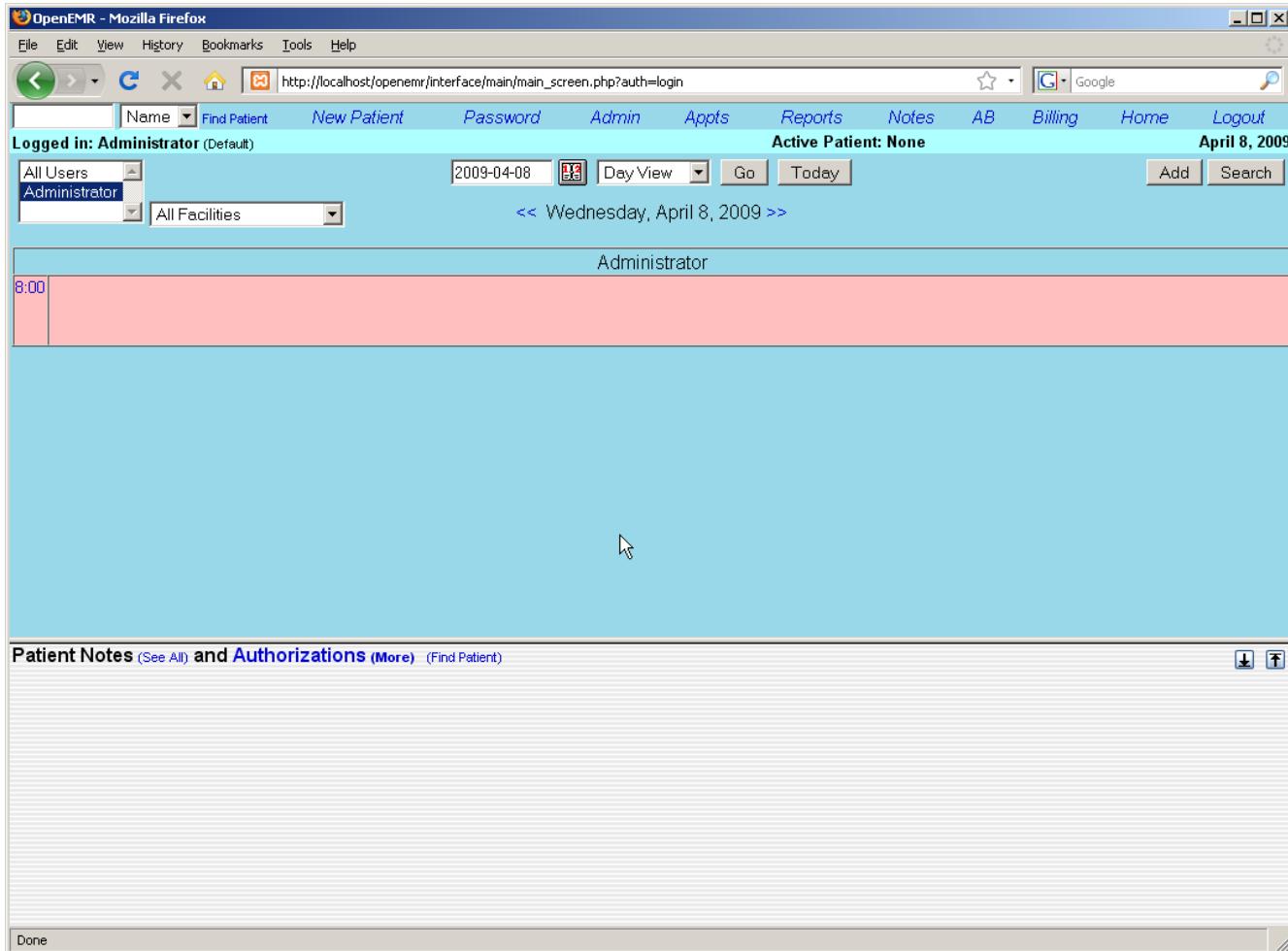
A successful login will bring you to the main screen of OpenEMR. The user is presented with two windows, the Calendar, and below that, the Patient Notes & Authorizations page.

Navigation

OpenEMR can be configured with your choice of three navigation schemes. Traditional, Tree View, or Radio Buttons. You can specify which scheme you would like to use by editing the file openemr/interface/globals.php (Detailed instructions can be found [here](#).)

Traditional

The Traditional navigation scheme uses context-sensitive menus located at the top of the screen, which change depending on what page is being viewed. The patient search function is also located at the top left corner of the screen.

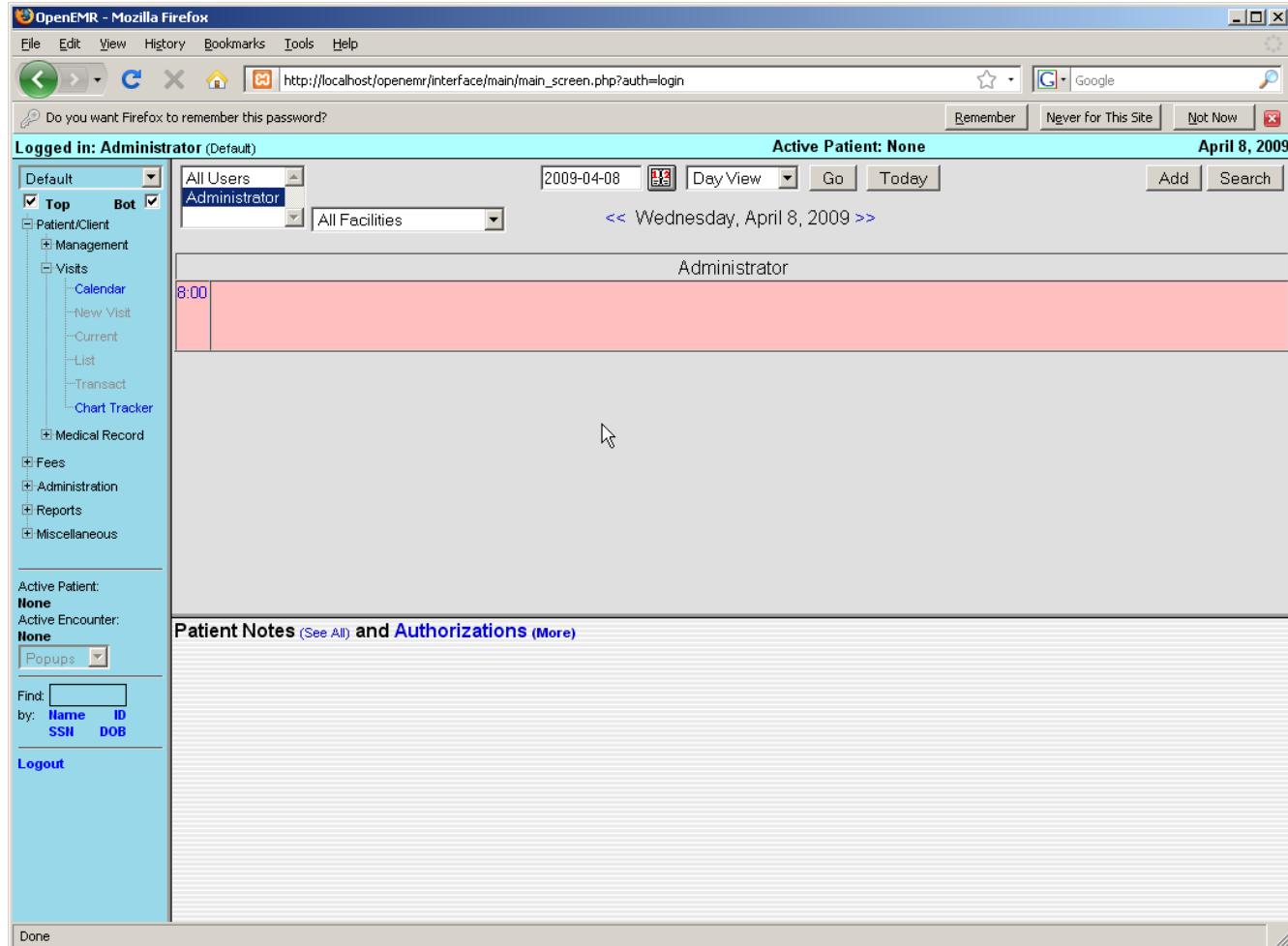


In the Traditional navigation scheme related pages are linked. Pages load simultaneously to facilitate the data entry process.

Tree View

The Tree View is the default navigation scheme for OpenEMR 3.1. This navigation scheme presents a hierarchical list of page links on the left side of the screen which can be directed to load in either the top or bottom widow of the main screen.

The patient search function is located below the navigation list on the left hand side of the screen.



Radio Buttons

The Radio Button navigation scheme functions similar to the Tree View except that the links are presented as an unordered list, with a series of radio button to the right and left of each item.

Selecting the left radio button will load the desired page in the top window, while selecting the right hand button will load the page in the bottom window. You can also disable the top or bottom window by clicking on the appropriate checkbox at the top of the navigation menu.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

All Users Add Search

Administrator All Facilities << Wednesday, April 8, 2009 >>

Administrator

8:00

Patient Notes (See All) and Authorizations (More)

Active Patient: None
Active Encounter: None
Popups

Find:
by: Name ID
SSN DOB

Logout Done

Setting Up Your Clinic

To begin using OpenEMR, navigate to your server's installation directory and log in using your assigned username and password.

A successful login brings you to the appointment calendar. Before you begin scheduling appointments you'll want to configure some basic information for your users. To start setting up your clinic, select 'Admin' from the navigation list on the left of the screen. If you're using the Tree View navigation scheme, this will bring up a list of available administration pages. Click 'Facilities' to bring up the Facility Administration page.

The screenshot shows the OpenEMR Facility Administration page. At the top, there's a navigation bar with links like 'Users', 'Forms', 'Practice', 'ACL', 'Calendar', 'Database', 'Notification', 'Language', 'Lists', 'Layouts', 'Backup', and 'Logs'. Below the navigation bar, the date 'April 8, 2009' is displayed. On the left, a sidebar lists various administrative functions such as Top, Bot, Admin, Reports, Ofc Notes, Fax/Scan, Add Blk, Chart Trk, Billing, Superbill, Authnotes, New Pt, Patient, History, Encounters, New Encntr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. A section titled 'Facility Administration' contains a form for 'New Facility Information' with fields for Name, Phone, Fax, Address, City, State, Zip Code, Country, Federal EIN, and Facility NPI. An 'Add' button is at the bottom of this form. Below this, there's a section for 'Edit Facilities' with a field labeled 'Your Clinic Name Here' containing '(E)(I)' with a cursor over it. At the bottom of the page, there's a section for 'Patient Notes (See All) and Authorizations (More)' which is currently empty. The URL in the browser address bar is http://localhost/openemr/interface/usergroup/facility_admin.php?fid=3.

This is one of several pages within the Administration section of OpenEMR. Administration also includes sections for managing your facility's Forms, Practice information, Calendar categories, Lists, Database administration, and more. Links to these sections can be found at the top of the Administration window, or in the left hand navigation list under 'Administration' if you are using the tree view.

Facility Administration

We'll start by setting up your facility for your users. There is a default clinic already built in. It will need to be updated with the correct information for your clinic. To do this, click 'edit' next to the line labeled "Your Clinic Name Here"

This takes you to the Edit Facility page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Blk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Edit Facility Information

Name:	Your Clinic Name Here	Phone as (000) 000-0000:	503-123-4567
		Fax as (000) 000-0000:	503-123-4568
Address:	1234 SW Main St	City:	Portland
State:	OR	Zip Code:	97205
Country:	USA	Federal EIN:	11-2222222
Billing Location:	<input checked="" type="checkbox"/>	Facility NPI:	
Service Location:	<input type="checkbox"/>	Accepts Assignment	<input checked="" type="checkbox"/>
(only if billing location):			
POS Code:	11: Office		
Billing Attn:	Cindy Cyan		
CLIA Number:	12345678		

[\[Back\]](#)

Patient Notes ([See All](#)) and **Authorizations** ([More](#))

Enter the correct name, address & contact information for your clinic. This information will be used for billing, so make sure to include who to direct billing information to, and enter your facility's NPI and CLIA number. Indicate whether your facility is a billing and/or service location by clicking the checkbox next to the appropriate option. If your clinic is a billing location, you may also want to check the "Accepts Assignment" box.

When you are finished entering your clinic's information click the 'Update' button, then click 'Back' to return to the Facility Administration page.

Your clinic may have additional facilities in which care is given, such as a hospital. To add these, enter them into the "New Facility Information" section and click the 'Add' button.

User Administration

Clicking 'Users' at the top of the screen (or on the left side in tree view) will bring you to the User & Group Administration page. The bottom of the this page contains a list of your clinic's users. If you have not yet added any users, then only "admin" will be shown.

You can add a new user by filling in the form to the right of the "New User" heading and then clicking 'Add.' Or you can modify an existing user by clicking the 'Edit' link next to that user's name.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top	Bot	Users	Forms	Practice	ACL	Calendar	Database	Notification	Language	Lists	Layouts	Backup	Logs																																																																																																	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/> Calendar <input type="radio"/> Password <input checked="" type="radio"/> Admin <input type="radio"/> Reports <input type="radio"/> Ofc Notes <input type="radio"/> Fax/Scan <input type="radio"/> Addr Blk <input type="radio"/> Chart Trk <input type="radio"/> Billing <input type="radio"/> Superbill <input type="radio"/> Auth/notes <input type="radio"/> New Pt <input type="radio"/> Patient <input type="radio"/> History <input type="radio"/> Encounters <input type="radio"/> New Enctr <input type="radio"/> Rx <input type="radio"/> Issues <input type="radio"/> Immunize <input type="radio"/> Documents <input type="radio"/> Pt Report <input type="radio"/> Pt Notes <input type="radio"/> Transact <input type="radio"/> Summary <input type="radio"/> Encounter <input type="radio"/> Charges																																																																																																												
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Clicking 'Edit' will bring up the User Administration page. Here you can edit a user's password, facility information and access controls, as well as their authorization status. Authorized users are practitioners, and will appear in the appointment calendar. They can also be associated with encounters for billing purposes, and are able to authorize encounter information entered by non-authorized users so that the encounter will be billable.

Make sure that your practitioners are 'Authorized' by clicking the check box in the User Administration page. Other facility staff do not need to be authorized. Practitioners will also need their UPIN and Federal Tax ID entered for correct billing, as well as their Federal Drug ID for prescription writing.

Once your users' information has been updated successfully click 'Save' and then 'Back' to return to the User & Group Administration page.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top Bot

Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Blk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Rx Issues
 Immunize Documents
 Pt Report Pt Notes
 Transact Summary
 Encounter Charges

User Administration

Username: black Password: * Leave blank to keep password unchanged.

Authorized: Active:

First Name: Betty Middle Name:

Last Name: Black Default Facility: Your Clinic Name Here

Federal Tax ID: 111-22-3333 Federal Drug ID: 222222

UPIN: U11111 See Authorizations: None

NPI: Job Description:

Taxonomy: 207Q00000X Calendar UI: Default

Access Control: Accounting
Administrators
Clinicians
Front Office
Physicians

Additional Info:
Cell: 503-987-6543

[Save] [Back]

Active Patient: None
Active Encounter: None
Popups

Find: by: Name ID SSH DOB

Logout Done

Patient Notes (See All) and **Authorizations** (More)

Practice Administration

Next you'll need to enter the relevant practice information for your clinic. This includes pharmacy and insurance company information, as well as the types of documents your clinic accepts.

Clicking the 'Practice' link at the top of the screen will bring you to the Practice Administration page.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main menu bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL "http://localhost/openemr/interface/main/main_screen.php?auth=login". The top right corner displays "Active Patient: None" and the date "April 10, 2009". A navigation bar at the top has tabs for Users, Forms, Practice (which is selected), ACL, Calendar, Database, Notification, Language, Lists, Layouts, Backup, and Logs. On the left, a sidebar titled "Logged in: Administrator (Default)" lists various administrative functions like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Below this is a section for "Patient Notes (See All) and Authorizations (More)". At the bottom left, there's a "Find" field with dropdown options for Name, ID, SSN, and DOB, along with "Logout" and "Done" buttons.

Click 'Add a Pharmacy' to enter the contact information for your clinic's pharmacy. A drop down menu lets you select the preferred method for transferring prescription information. Once you've entered the correct information, click 'Update' to save your new pharmacy.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies
Add a Pharmacy Name Corner Pharmacy
Address 500 W Burnside
Insurance Companies
Add a Company Address
Insurance Numbers
X12 Partners City, State Zip Portland, OR 97204
Email
Phone 503-987-6543
Fax 503-987-6544
Default Method Print

[Documents](#)
[Edit Categories](#)

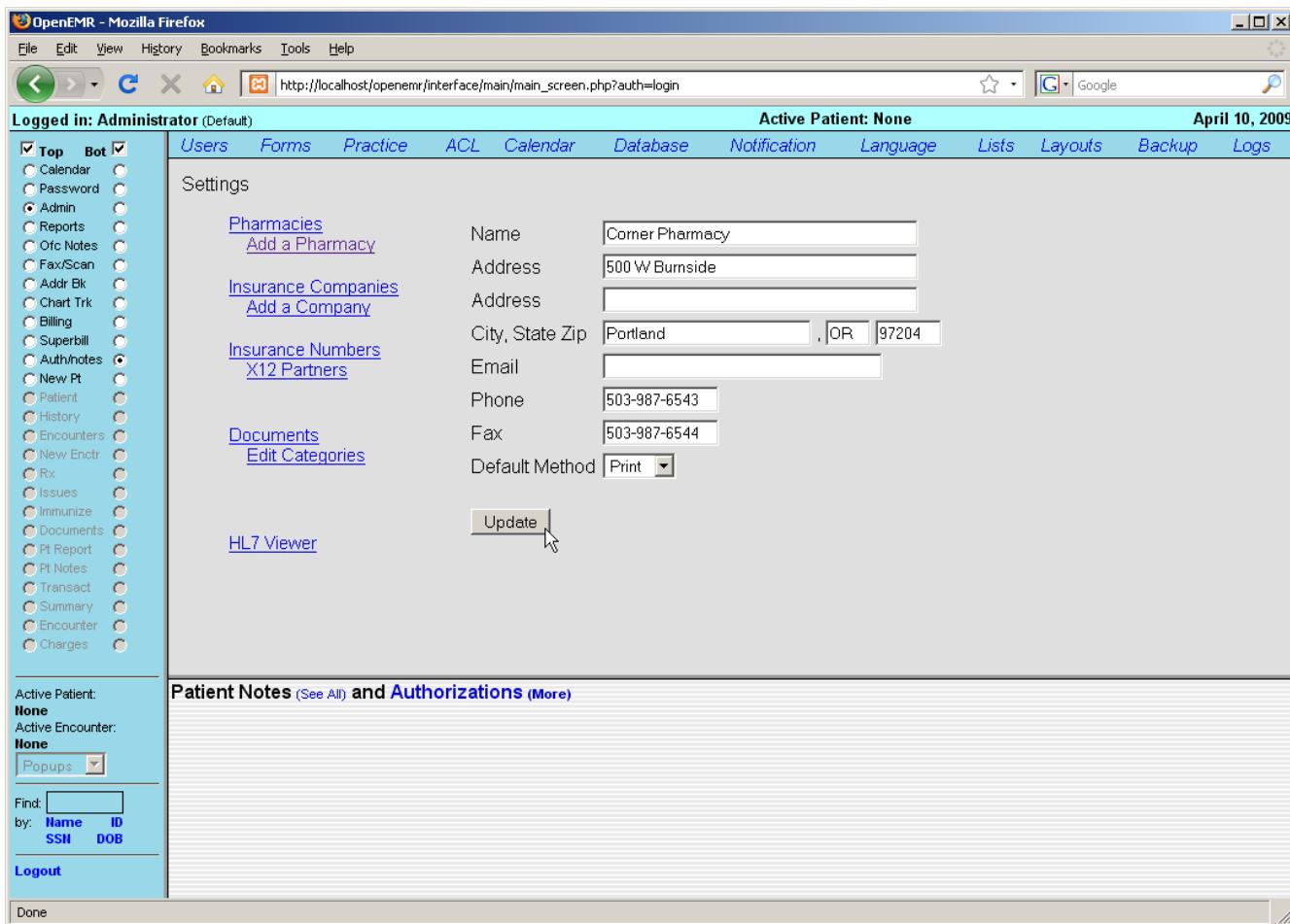
[HL7 Viewer](#)

Active Patient: None
Active Encounter: None
Popups

Find:
by: [Name](#) [ID](#)
[SSN](#) [DOB](#)

[Logout](#)

Done



Before setting up any insurance companies, you'll want to enter your X12 Partner information. These are the clearinghouses or large payers to whom you will send electronic billing. Most practices will probably just use a single clearinghouse.

To add one of these clearinghouses, click on 'X12 Partners' and then click 'Add New Partner'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies X12 Partner
Add a Pharmacy Partner Name Zirmed

Insurance Companies ID Number (ETIN) 12345
Add a Company Receiver ID 23456

Insurance Numbers X12 Partners Sender ID 34567

Documents Version 004010X098A1
Edit Categories Processing Format standard

Add

HL7 Viewer

Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSH DOB

Logout Done

Patient Notes (See All) and Authorizations (More)

The ID numbers that you enter here will need to be provided to you by the clearinghouse/partner. The Version number refers to the version of the X12 837p protocol specification used and should probably not be changed. Click 'Add' to save the information you've entered.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies Name City, State Default X12 Partner
Add a Pharmacy MedOne South San Fransisco CA Zirmed

Insurance Companies Name City, State Default X12 Partner
Add a Company Pacific Health Pasadena CA Zirmed

Insurance Numbers X12 Partners

Documents Edit Categories

HL7 Viewer

Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSH DOB

Logout Done

The screenshot shows the OpenEMR interface in Mozilla Firefox. The top navigation bar includes File, Edit, View, Bookmarks, Tools, and Help. The address bar shows the URL http://localhost/openemr/interface/main/main_screen.php?auth=login. The title bar indicates the user is logged in as 'Administrator (Default)' with 'Active Patient: None' and the date 'April 10, 2009'. A sidebar on the left lists various clinic management functions like Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. The main content area displays 'Settings' for 'Pharmacies' and 'Insurance Companies', both listing a single entry each with columns for Name, City, State, and Default X12 Partner. Below these are links for 'Insurance Numbers', 'X12 Partners', 'Documents', and 'Edit Categories'. At the bottom left, there are sections for 'Active Patient' and 'Active Encounter', both currently set to 'None'. There is also a 'Popups' dropdown menu, a search bar with fields for Name, ID, SSH, and DOB, and a 'Logout' button.

Selecting 'Insurance Companies' from the links to the left of the page brings up a list of Companies that have been added to your clinic. If this is a new installation of OpenEMR, this list will be empty. You can add a new insurance company by clicking 'Add a Company'. Or, you can edit an existing company by clicking on its name in the list.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies
Add a Pharmacy Name MedOne

Insurance Companies
Add a Company Attn

Insurance Numbers
X12 Partners Address 123 Comercial Ave

Address

City, State Zip South San Fransisco, CA 54080

Phone 650-444-1234

CMS ID 12345

Payer Type Commercial Insurance Co.

Default X12 Partner Zimed

HL7 Viewer Update

Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSH DOB

Logout Done

Patient Notes (See All) and Authorizations (More)

The screenshot shows the 'Settings' section of the OpenEMR interface. On the left, there's a sidebar with various clinic management links. The main area has sections for 'Pharmacies', 'Insurance Companies', and 'Insurance Numbers'. Under 'Insurance Numbers', there's a link to 'X12 Partners'. The 'X12 Partners' section contains fields for 'Name', 'Attn', 'Address', 'City, State Zip', 'Phone', 'CMS ID', 'Payer Type', and 'Default X12 Partner'. An 'Update' button is located below these fields. A cursor is hovering over the 'Update' button. The bottom left of the screen shows active patient and encounter information, and a search bar.

Once you have entered the correct information, click 'Update' to save any changes, or add the new company to the list.

In practice, many insurance companies have multiple insurance plans with a separate billing address for each plan. At this time, you will need to add each plan as a separate insurance company.

Many insurance companies also assign their own doctor-specific ID numbers, and these numbers must appear in your claims. Click on 'Insurance Numbers' to see a list of your clinic's providers and their default ID numbers.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies Name Provider # Rendering # Group #
Add a Pharmacy Administrator Default 22334 01234

Insurance Companies Betty Black Default
Add a Company Gary Green Default

Insurance Numbers X12 Partners

Documents Edit Categories

HL7 Viewer

Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSH DOB

Logout Done

The screenshot shows the OpenEMR interface. On the left, there's a sidebar with various links like 'Calendar', 'Reports', 'Fax/Scan', etc. The main area has tabs for 'Users', 'Forms', 'Practice', etc. Under 'Settings', there are sections for 'Pharmacies' and 'Insurance Companies'. In the 'Pharmacies' section, it shows an entry for 'Administrator' with 'Default' as the name, '22334' as the provider number, and '01234' as the group number. In the 'Insurance Companies' section, it shows entries for 'Betty Black' and 'Gary Green', both marked as 'Default'. There are also sections for 'Insurance Numbers' and 'Documents'. At the bottom left, there are dropdown menus for 'Popups' and 'Find' (with fields for Name, ID, SSH, DOB), and a 'Logout' button.

Click on a provider's name to bring up a list of insurance companies and the corresponding ID numbers that have been entered for that provider.

Selecting 'Add New...' presents a form for adding this provider's numbers for another insurance company. Fill in this information and click the 'Add' button to save. You can also edit an existing set of numbers by clicking on the company name in the list.

Note that one of the selections in the drop down list of insurance companies is "Default"; you can use this to fill in default numbers for insurance companies not otherwise entered.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies Provider Administrator
Add a Pharmacy MedOne Provider # 22334

Insurance Companies Rendering Provider #
Add a Company Group # 01234

Add New...

Insurance Numbers X12 Partners

Documents Provider Number Insurance Company Default Type:
Edit Categories Unspecified

Rendering Provider Number Type:
Unspecified

HL7 Viewer Group Number

Update

Patient Notes (See All) and Authorizations (More)

Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSH DOB

Logout Done

The screenshot shows the OpenEMR interface. At the top, there's a navigation bar with links like 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. Below that is a toolbar with icons for 'Top', 'Bot', 'Users', 'Forms', 'Practice', 'ACL', 'Calendar', 'Database', 'Notification', 'Language', 'Lists', 'Layouts', 'Backup', and 'Logs'. The main content area has a 'Settings' section. Under 'Provider', it shows 'Administrator' with 'MedOne' selected. Under 'Insurance', it shows 'Companies' with 'Add a Company' selected. There are dropdown menus for 'Type:' under 'Provider Number' and 'Rendering Provider Number', both currently set to 'Unspecified'. Under 'Documents', there's a link to 'Edit Categories'. A large button labeled 'Update' is at the bottom of this section. Below this is a 'Patient Notes' section with links to 'See All' and 'Authorizations'. On the left side, there's a sidebar with 'Active Patient: None' and 'Active Encounter: None'. It also has a 'Popups' dropdown, a search bar ('Find:'), and buttons for 'Logout' and 'Done'.

Next click on 'Edit Categories'. This displays a hierarchy of the different types of documents that you can attach to a patient. The default set is shown. To add more categories click on the desired parent name, fill in the name of the new document type, and click 'Add Category'

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies [Add a Pharmacy](#)

Insurance Companies [Add a Company](#)

Insurance Numbers [X12 Partners](#)

Documents [Edit Categories](#)

HL7 Viewer

Patient Notes [\(See All\)](#) and Authorizations [\(More\)](#)

Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSH DOB

[Logout](#)

[Done](#)

Document Categories

[Categories D](#)

[Lab Report D](#)

[Medical Record D](#)

[Patient Information D](#)

[Patient ID card D](#)

The new category will be a sub-category of Patient Information

Category Name: Insurance Card Add Category

Lists

Select 'Lists' from the menu at the top of the Admin page. This brings you to OpenEMR's List Management system. This is where many of the selection lists within OpenEMR are stored and edited. Before you begin using OpenEMR you will need to populate these lists with data appropriate to your clinic.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Edit list: Language Delete this List New List

ID	Title	Order	Default
English	English	1	<input checked="" type="checkbox"/>
Spanish	Spanish	2	<input type="checkbox"/>
			<input type="checkbox"/>

Save

Boolean
Chart Storage Locations
Country
Drug Forms
Drug Units
Drug Routes
Drug Intervals
Exams/Tests
Fee Sheet
Language
Marital Status
Price Level
Race/Ethnicity
Referral Source
Risk Factors
Risk Level
Service Category
Sex
State
Tax Rate

Patient Notes (See All) and Authorizations (More)

Active Patient:
None
Active Encounter:
None
Popups

Find:
by: Name ID
SSN DOB

Logout Done

Select 'State' from the drop-down list. OpenEMR comes configured with only one state by default. If your clinic sees patients from only one state you can simply replace the default state by clicking in the 'ID' and 'Title' fields and replacing them with the appropriate information.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Edit list: State Delete this List New List

ID	Title	Order	Default
CA	California	1	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Save

Patient Notes (See All) and Authorizations (More)

Active Patient:
None
Active Encounter:
None
Popups

Find: by: Name ID
SSN DOB

Logout Done

Alternatively, you can add multiple states by filling in the empty fields that are provided for you. You can also specify which state you would like to use as the default by selecting the checkbox next to that state.

When you are finished modifying the list, click 'Save'. This will update the list and generates a new set of empty fields should you need to add additional states to the list.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Edit list: State Delete this List New List

ID	Title	Order	Default
CA	California	1	<input type="checkbox"/>
OR	Oregon	2	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Save

Patient Notes (See All) and Authorizations (More)

Active Patient:
None
Active Encounter:
None
Popups

Find:
by: Name ID
SSN DOB

Logout Done

ID	Title	Order	Default
CA	California	1	<input type="checkbox"/>
OR	Oregon	2	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

The drop-down contains lists for Race/Ethnicity, common billing codes that appear in the Fee Sheet, Price Levels, common Exams/Tests, etc. All of these lists may be modified in this same manner.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Edit list: Race/Ethnicity Delete this List New List

ID	Title	Order	Default
Caucasian	Caucasian	1	<input type="checkbox"/>
Asian	Asian	2	<input type="checkbox"/>
Black	Black	3	<input type="checkbox"/>
Hispanic	Hispanic	4	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Save

Patient Notes (See All) and Authorizations (More)

Active Patient: None
Active Encounter: None
Popups

Find: by: Name ID
SSN DOB

Logout Done

Address Book

OpenEMR also contains a built-in address book for storing useful contact information for your staff as well as other doctors, clinics, etc. that your office may contact on a regular basis.

Select 'Addr Bk' (under 'Miscellaneous') from the navigation menu to bring up your clinic's Address Book.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

First Name: [] Last Name: [] Specialty: [] Search Add New

Name	Local	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Administrator,	*									
Black, Betty	*									

New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: **None**
Active Encounter: **None**
Popups

Find: [] by: **Name** **ID** **SSN** **DOB**

[Logout](#) Done

Patient Notes ([See All](#)) and Authorizations ([More](#))

This screenshot shows the OpenEMR Address Book interface. On the left, there's a sidebar with various links like 'New Pt', 'Patient', 'History', etc. The main area displays a table of contacts with columns for Name, Local, Specialty, Phone, Mobile, Fax, Email, Street, City, State, and Postal. Two contacts are listed: 'Administrator,' and 'Black, Betty'. Below the table, there's a section for 'Patient Notes' and 'Authorizations'. At the bottom left, there are search fields for 'Find' and 'by' (Name, ID, SSN, DOB), and buttons for 'Logout' and 'Done'.

This will present you with a list of all of the contacts currently contained in your Address Book. Click on a person's name to edit their contact information, or click 'Add New' to enter a new contact into your address book.

Add New Person - Mozilla Firefox

http://localhost/openemr/interface/usergroup/addrbook_edit.php?userid=0

Name: Dr. Last: Orange First: Ophelia Middle:

Specialty: Dermatology

Organization: Universal Health Center

Valedictory:

Home Phone: Mobile:

Work Phone: 503-222-3344 2nd: Fax: 503-222-3345

Assistant:

Email:

Website:

Main Address: 4456 SE Washington St.

City: Portland State/county: OR Postal code: 97215

Alt Address:

City: State/county: Postal code:

UPIN: U78901 NPI: TIN: Taxonomy: 207Q00000X

Notes:

Done

In the 'Add New Person' dialog box, select a title, and enter their name and address. If you are adding a physician to your address book, be sure to include their UPIN and other ID numbers for billing and referrals. Entering a 'Specialty' will allow you to narrow your search parameters when writing letters to a particular physician, etc.

When you are finished entering the new contact information, click 'Save'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

First Name: Last Name: Specialty:

Name	Local	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Administrator,	*									
Black, Betty	*									
Orange, Ophelia		Dermatology	503-222-3344		503-222-3345		4456 SE Washington St.	Portland	OR	97215

Patient Notes ([See All](#)) and Authorizations ([More](#))

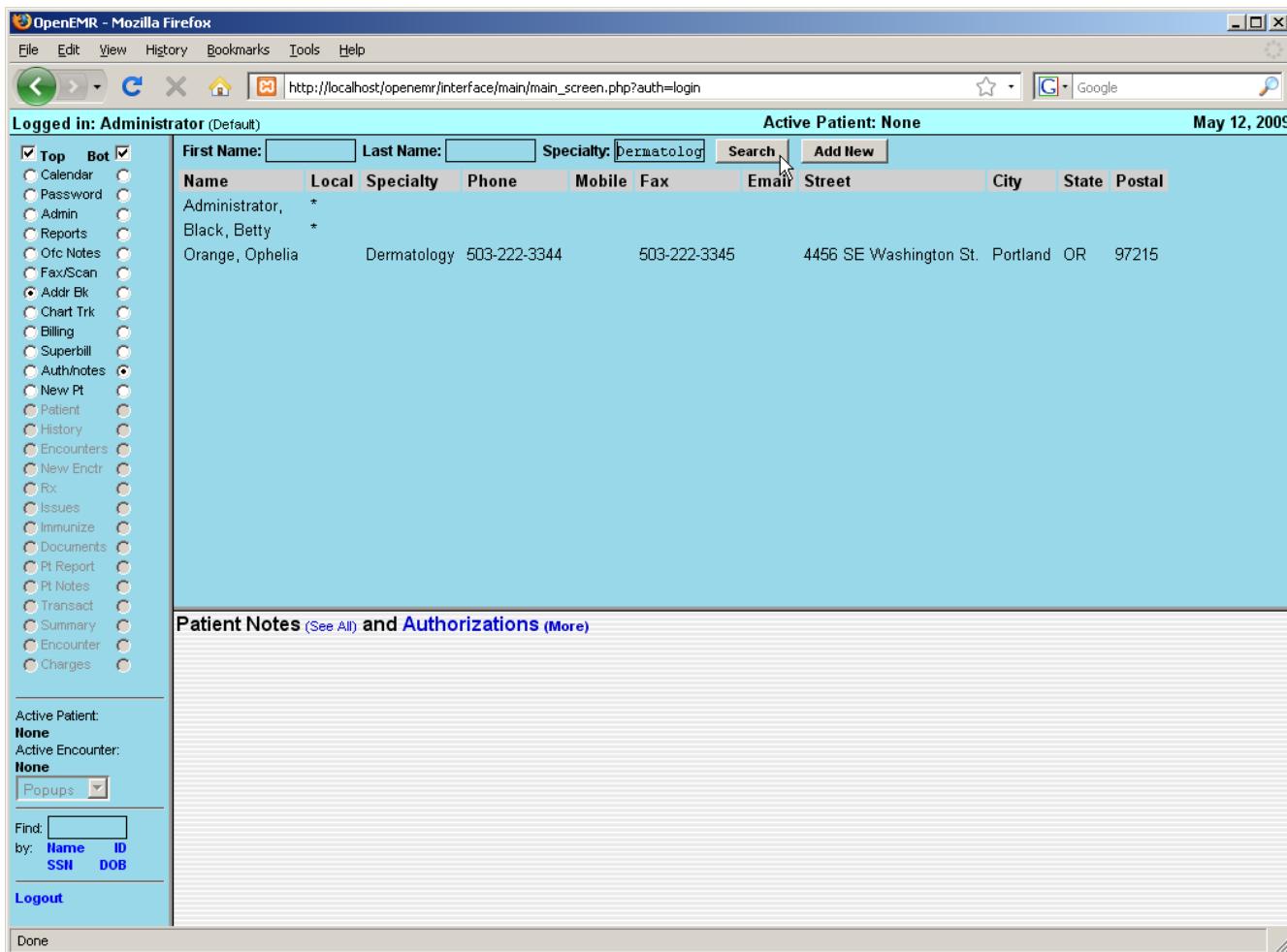
Active Patient:
None

Active Encounter:
None

Find:
by: [Name](#) [ID](#)
[SSN](#) [DOB](#)

[Logout](#)

[Done](#)

A screenshot of the OpenEMR web application in Mozilla Firefox. The main content area shows a search results table for patients. The first row is a header with columns: Name, Local, Specialty, Phone, Mobile, Fax, Email, Street, City, State, and Postal. Below it are two rows of data. The first data row has columns: Name (Administrator, *), Local (*), Specialty (empty), Phone (empty), Mobile (empty), Fax (empty), Email (empty), Street (empty), City (empty), State (empty), and Postal (empty). The second data row has columns: Name (Black, Betty), Local (*), Specialty (empty), Phone (empty), Mobile (empty), Fax (empty), Email (empty), Street (empty), City (empty), State (empty), and Postal (empty). The third data row contains patient details: Name (Orange, Ophelia), Local (empty), Specialty (Dermatology), Phone (503-222-3344), Mobile (empty), Fax (503-222-3345), Email (empty), Street (4456 SE Washington St.), City (Portland), State (OR), and Postal (97215). On the left side, there is a sidebar with various menu items like Calendar, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Some items have radio buttons next to them. Below the sidebar, there are sections for Active Patient (set to None), Active Encounter (set to None), and a Find field with dropdown options for Name, ID, SSN, and DOB. At the bottom of the sidebar are links for Popups, Logout, and Done.

Note that the new contact has been added to the list.

You can search for a particular contact in the address book by enter their name and/or specialty at the top of the page and clicking 'Search'. This brings up a list of any contacts matching your search parameters.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

First Name: Last Name: Specialty: Search Add New

Name	Local	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Orange, Ophelia		Dermatology	503-222-3344		503-222-3345		4456 SE Washington St.	Portland	OR	97215

Patient Notes ([See All](#)) and Authorizations ([More](#))

Active Patient: **None**
Active Encounter: **None**

Find:
by: Name ID
 SSN DOB

[Logout](#)

Adding A New Patient

Once you have entered all the necessary clinic information you can begin entering patient data.

Click 'New Pt.' in the navigation menu on the left of the screen to begin entering a new patient into the system. In the Tree View scheme the Search or Add Patient page can be found under 'Patient/Client – Management – New/Search'.

Patient Demographics

In the Search or Add Patient page enter the patient's name & birth date. If you have an existing chart for this patient, you may enter the chart number under 'External ID'. If you do not enter a number the system will automatically assign one that is equal to its internal patient ID. When you are finished click 'Save Patient Demographics'.

Note: Clicking the calendar button next to the "DOB" field will pop up an easy to use date selection tool found throughout the OpenEMR program. Simply click the arrows to the right or left of "Today" to advance the date forward or back a single month or year, or hold an arrow down to select the month or year manually. Selecting the day of the month will then fill the selected date into it's respective field in the proper format (YYYY-MM-DD)

The screenshot shows the OpenEMR interface for adding a new patient. The main title bar says "Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month" and the date "April 10, 2009". On the left is a vertical navigation menu with various links like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Authnotes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Below this is a "Demographics" section with fields for Name (Mr. Rod Roark), External ID (1), DOB (1985-08-06), Sex (Male), S.S. (111-22-3333), Marital Status (Married), and User Defined. A calendar window is open over the page, showing August 1985. The date 06 is selected, highlighted with a red border. The calendar has buttons for navigating months and years. At the bottom of the calendar is the text "Tue, Aug 6". Below the calendar is a button labeled "[Save Patient Demographics]". The bottom of the page has sections for "Patient Notes (See All)" and "Authorizations (More)".

You should now be presented with the patient Demographics page, which contains a summary of the patient's identifying information, including employment, insurance and provider information.

Notice that all of the patient related pages are now accessible via the navigation menu to the left.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics ([More](#)) ([Delete](#))

Who

Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.:
Marital Status:
User Defined:

Contact

Address: City:
State: Postal Code:
Country: Emergency Contact:
Work Phone: Home Phone:
Contact Email: Mobile Phone:
Provider:
Pharmacy:

HIPAA Notice Received:

Allow Mail Message: Allow Voice Message:
Allow Email: NO Allow SMS: NO
Occupation: Leave Message With:
Employer Address: Employer Name:
State: City:
Country: Postal Code:

Stats

Language: Financial Review Date: 0000-00-00 00:00:00
Monthly Income: Interpreter: Race/Ethnicity: Family Size:
Homeless, etc.: Migrant/Seasonal:

Patient Notes ([See All](#)) and **Authorizations** ([More](#))

Active Patient: Rod Roark (1)
Active Encounters: None
Popups

Find:
by: Name ID
 SSH DOB

Logout Done

To continue entering patient information click 'Demographics (more)' at the top of the page.

This will bring up a series of expandable sections containing inputs for the various types of patient data. Click the checkbox next to the section or sections you would like to work with. Fill in the desired fields. Note that fields labeled in red are required in order for billing to work properly.

Continue entering data as necessary.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Blk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Rx Issues
 Immunize Documents
 Pt Report Pt Notes
 Transact Summary
 Encounter Charges

Demographics (Back)

Who
 Contact

Address: 321 SW Capitol Hwy City: Portland
State: Unassigned Postal Code: 97219
Country: USA Emergency Contact: Wife
Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
Contact Email: mr.rod@gmail.com

Choices

Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife

Employer
 Stats
 Insurance

[Save Patient Demographics]

Active Patient:
Rod Roark (1)
Active Encounter:
None
Popups

Find:
by: Name ID
 SSN DOB

Logout Done

The last section in the Demographics area is the Insurance section.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Blk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Demographics (Back)

Who
 Contact
 Choices
 Employer
 Stats
 Insurance

Primary Insurance Provider: Pacific Health

Plan Name:	PH 7.0	Subscriber:	Rod	Roark
Effective Date:	0000-00-00	Relationship:	Self	(Browse)
Policy Number:	1122334	D.O.B.:	2009-04-14	S.S.: 111-22-3333
Group Number:	1234	Male		Sex:
Subscriber Employer (SE) (if unemployed enter Student, PT Student, or leave blank):		Subscriber Address: 321 SW Capitol Hwy		
		City: Portland State: OR		
SE Address:	Zip Code: 97219 Country: USA			
SE City:	Portland	SE State:	OR	Subscriber Phone: 503.456.7890
SE Zip Code:	97002	SE Country:	USA	CoPay:
<input type="checkbox"/> Accept Assignment: YES				

Secondary Insurance Provider Unassigned

Plan Name:	Subscriber:			
Effective Date:	0000-00-00	Relationship:		(Browse)
Policy Number:		D.O.B.:	0000-00-00	S.S.:
		Male		Sex:

Patient Notes ([See All](#)) and **Authorizations** ([More](#))

Find:
by: Name ID
 SSN DOB

[Logout](#)

[Done](#)

Select the patient's insurance company from the drop-down list, or you can search for it by clicking 'Search/Add Insurer'. Doing so brings up a dialog box containing several fields which are searchable (labeled in green). Entering a partial value into one or more fields and clicking the 'Search' button pops up a second dialog containing a list of all insurance companies matching those parameters.

Selecting the desired name from the list will automatically make it the selection for that patient.

Insurance Company Search/Add - Mozilla Firefox

http://localhost/openemr/interface/practice/ins_search.php

Name: Pacific

Attention:

Address1:

Address2:

City/State: Pasadena CA

Zip/Country: USA

Phone:

CMS ID:

Payer Type: Commercial Insurance Co.

X12 Partner: Zirmed

Search Save as New Cancel

Done

List Insurance Companies - Mozilla Firefox

http://localhost/openemr/interface/practice/ins_list.php?form_name=Pacific&form_attn=&form_addr1=&form_addr2=&form_city=Pasadena&form_

Name	Attn	Address	City	State	Zip	Phone
Pacific Health		2001 E 123rd St	Pasadena	CA	90059	310-654-3210

If the desired insurance company is not yet entered, you can also add it here by completing all the fields and clicking 'Save as New'. This also selects the newly added insurance company for this patient.

If the patient is the also the insured party, then selecting "self" from the drop-down list will automatically populate the "subscriber" section with the relevant data for you.

When you are finished, click 'Save Patient Demographics' at the bottom of the page to save and return to the Demographics summary. You can see that all of the new patient data is now visible on the summary page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics ([More](#)) ([Delete](#))

Who

Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married

Contact

User Defined:
Address: 321 SW Capitol Hwy
State:
Country: USA
Emergency Phone: 971-222-3333
Work Phone: 503-112-3334
Contact Email: mr.rod@gmail.com
Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland

HIPAA Notice Received: YES
Allow Mail Message: NO
Allow Email: YES
Occupation: Engineer
Employer Address: 44566 Industry Way
State: OR
Country: USA
Language: English

Employer

Employer Name: NW Company
City: Portland
Postal Code: 97002

Stats

Financial Review Date: 0000-00-00 00:00:00
Monthly Income:
Interpreter:

Allow Voice Message: YES
Allow SMS: NO
Leave Message With: wife
Race/Ethnicity: Caucasian
Family Size:
Homeless, etc.:
Migrant/Seasonal:

Patient Notes ([See All](#)) and **Authorizations** ([More](#))

Find:
by: Name ID SSH DOB

[Logout](#)

[Done](#)

Patient History

Next select 'History' from the navigation menu on the left side of the screen. (under 'Patient/Client – Medical Record') This brings up a summary page containing information about the patient's medical history.

Clicking on 'Patient History / Lifestyle (more)' will bring up a data entry page with expanding sections, similar to that of the Demographics page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transect Summary Encounter Charges

Patient History / Lifestyle (Back)

General

Risk Factors: Varicose Veins Hypertension Diabetes Sickle Cell Fibroids PID (Pelvic Inflammatory Disease) Severe Migraine Heart Disease Thrombosis/Stroke Hepatitis Gall Bladder Condition Breast Disease Depression Allergies Infertility Asthma Epilepsy Contact Lenses Contraceptive Complication (specify) Other (specify)

Exams/Tests:

Breast Exam Cardiac Echo ECG Gynecological Exam Mammogram Physical Exam Prostate Exam Rectal Exam Sigmoid/Colonoscopy Retinal Exam Flu Vaccination Pneumonia Vaccination LDL Hemoglobin PSA

N/A Nor Abn Date/Notes

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Access the desired sections by clicking on the appropriate check box, and enter in the patient's data as necessary, then click 'Save'.

Uploading Documents

Select 'Documents' from the navigation menu on the left. Here you may upload files that you have scanned and/or saved, such as a patient's ID or insurance card.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main content area is titled "Logged in: Administrator (Default)" and "Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009". On the left, a sidebar lists various menu items like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transect, Summary, Encounter, and Charges. A note in the center states: "NOTE: Uploading files with duplicate names will cause the files to be automatically renamed. For example 'file.jpg' will become 'file.jpg.1'. Filenames are considered unique per patient, not per category." Below this, there is a section for uploading documents to the "Insurance Card" category, with a file input field containing "J:\M12\insurance_card.jpg" and a "Browse..." button. An "Upload" button is also present. At the bottom, there are links for "Patient Notes (See All) and Authorizations (More)". The bottom left corner shows the active patient information: "Rod Roark (1)", "Active Encounter: None", and a "Popups" dropdown set to "Popups".

First, click the appropriate Document Category for the file you wish to upload, then click 'Browse'. This will present you with the standard dialog for locating the file on your computer. Once the desired file has been selected, click 'Upload' to save the file in OpenEMR.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Document Categories

Categories

- Lab Report
- Medical Record
- Patient Information
 - Insurance Card
 - Patient ID card

NOTE: Uploading files with duplicate names will cause the files to be automatically renamed. For example 'file.jpg' will become 'file.jpg.1'. Filenames are considered unique per patient, not per category.

Upload Document to category 'Insurance Card'

Upload Report

File insurance_card.jpg successfully stored.

ID: 15
Patient: 1
URL: file:///C:/xampphtdocsopenemr/documents/1/insurance_card.jpg
Size: 25985
Date: 2009-04-10 16:33:08 
MimeType: image/jpeg
Revision: 2009-04-10 16:33:08

Active Patient:
Rod Roark (1)
Active Encounter:
None
Popups

Find:
by: Name ID
 SSN DOB

Done

Patient Notes ([See All](#)) and Authorizations ([More](#))

Once the file is uploaded, you will be presented with a report, confirming the file has been uploaded successfully. To see the new file, click on the arrow next to the appropriate document category which displays a list of all the files in that category. Click on the name of the new file to view it.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Document Categories

Categories

- Lab Report
- Medical Record
- Patient Information
 - Insurance Card
 - 2009-04-10 insurance_card.jpg
 - Patient ID card

INSURANCE COMPANY NAME  COVERAGE TYPE

MEMBER NAME: JOHN DOE MEMBER NUMBER: XXX-XX-XXXX EFFECTIVE DATE: XX-XX-XXXX

GROUP #: XXXXX-XXX-XXX PRESCRIPTION GROUP #: XXXXX

PCP CO-PAY: \$15.00 PRESCRIPTION CO-PAY:
SPECIALIST CO-PAY: \$25.00 \$15 GENERIC
EMER. ROOM CO-PAY: \$75.00 \$20 NAME BRAND

MEMBER SERVICES: 1-800-XXX-XXXX CLAIMS/INQUIRIES: 1-800-XXX-XXXX

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

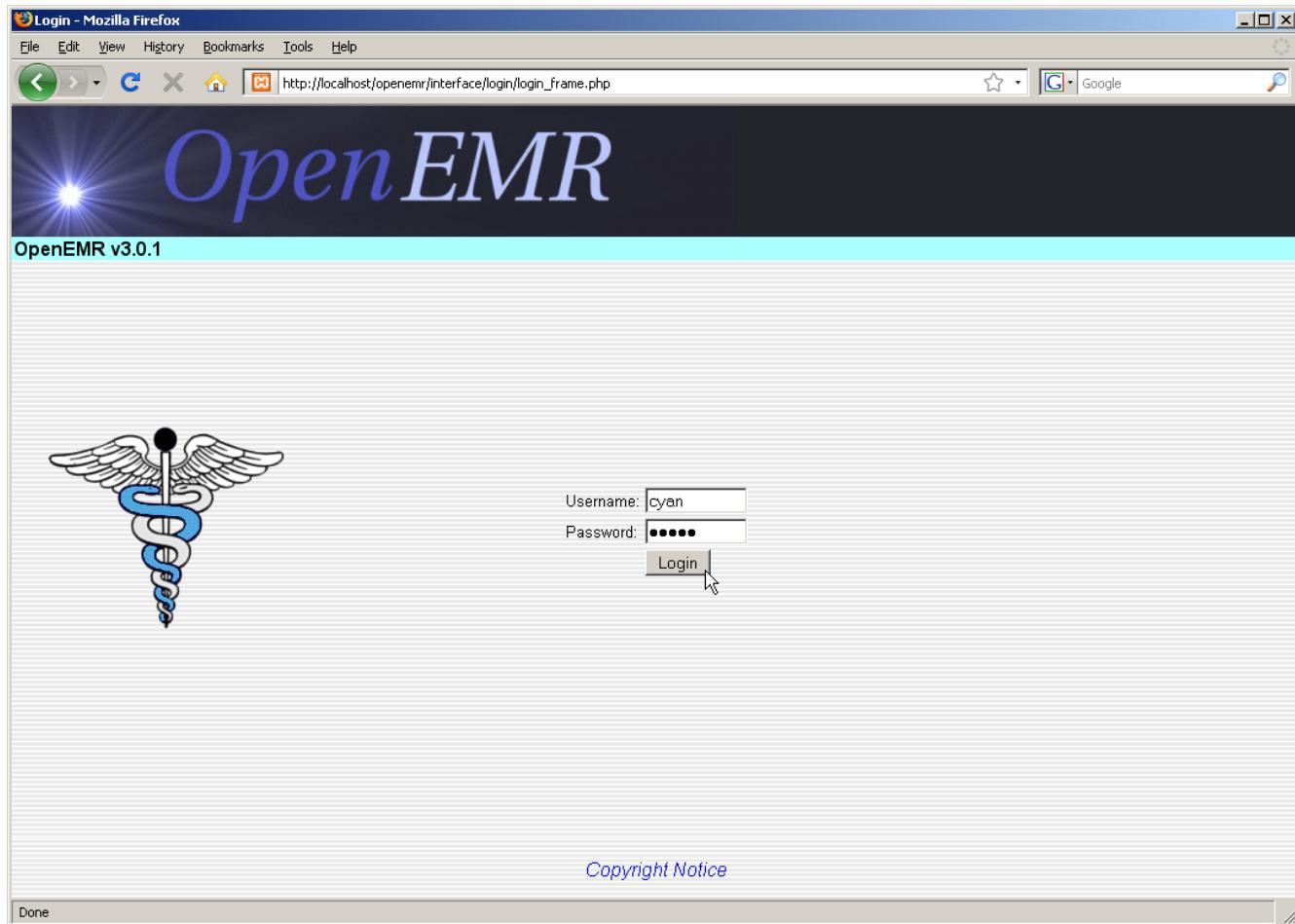
Find:
by: Name ID SSH DOB

Logout

http://localhost/openemr/controller.php?document&view&patient_id=1&doc_id=15&

Using The Calendar

In this section we'll discuss setting up a doctor's schedule in the calendar and adding patient appointments.



Setting Up Schedules

Login to OpenEMR using your assigned username and password.

For users who are not practitioners, such as someone who works at the front desk, the Calendar will show the schedules of all the practitioners at the clinic by default. When you first start using OpenEMR you will need to set up schedules for all of your practitioners.

To do this, click on “8:00” under the Name of the doctor who's schedule you wish to set up.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default)

Active Patient: None April 10, 2009

Top Bot

All Users 2009-04-10 Day View Go Today Add Search

Administrator Betty Black All Facilities << Friday, April 10, 2009 >>

Administrator	B Black	G Green
8:00	8:00	8:00
9:30 IN		
9:45		
10:00		
10:15		
10:30		
10:45		
11:00		
11:15		
11:30		
11:45		
12:00		
12:15		
12:30		
12:45		

Active Patient: None Active Encounter: None

Popups Find: by: Name ID SSN DOB

Logout Done

This will present you with the 'Add New Event' dialog box.

Add New Event - Mozilla Firefox

http://localhost/openemr/interface/main/calendar/add_edit_event.php?startampm=18starttimeh=8

Category:	In Office	<input type="radio"/> All day event
Date:	2009-04-10	<input type="radio"/> Time 8 : 30 AM
Title:	In Office	duration 0 minutes
Facility:	Your Clinic Name Here	
Patient:	Click to select	
Provider:	Black, Betty	<input checked="" type="checkbox"/> Repeats every workday
Pref Cat:	-None-	until 2010-04-10
Comments:		
<input type="button" value="Save"/> <input type="button" value="Find Available"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>		

Done

The clinic and provider name should be automatically filled in for you. Set the time at which the doctor arrives by filling in the appropriate time on the right, and choosing "In Office" from the 'Category' drop-down list.

You can also choose to make this a repeating event, which allows you to only have to set up an event once for a given period of time. Do this by selecting the 'Repeats' checkbox, and setting the appropriate frequency & duration.

When you are finished click 'Save' to update the calendar. Now you will see a list of available time slots for that doctor's schedule. Scroll down and click on the time that doctor is scheduled to leave the office for the day.

The screenshot shows the 'Add New Event' form in Mozilla Firefox. The 'Category' is set to 'Out Of Office'. The 'Date' is '2009-04-10'. The 'Title' is 'Out Of Office'. The 'Facility' is 'Your Clinic Name Here'. The 'Patient' field says 'Click to select'. The 'Provider' is 'Black, Betty'. The 'Status' dropdown is empty. The 'Comments' field is empty. The 'Time' is set to 5:00 PM, and the 'duration' is 0 minutes. The 'Repeats' checkbox is checked, set to 'every workday'. The 'Save' button is highlighted with a cursor. Other buttons include 'Find Available', 'Delete', and 'Cancel'. A 'Done' button is at the bottom.

Now the time is automatically selected, as well as the provider and facility information. The same process is used to create a repeating "Out Of Office" event.

The screenshot shows the 'Add New Event' form in Mozilla Firefox. The 'Category' is set to 'Lunch'. The 'Date' is '2009-04-10'. The 'Title' is 'Lunch'. The 'Facility' is 'Your Clinic Name Here'. The 'Patient' field says 'Click to select'. The 'Provider' is 'Black, Betty'. The 'Status' dropdown is empty. The 'Comments' field is empty. The 'Time' is set to 12:00 PM, and the 'duration' is 60 minutes. The 'Repeats' checkbox is checked, set to 'every workday'. The 'Save' button is highlighted with a cursor. Other buttons include 'Find Available', 'Delete', and 'Cancel'. A 'Done' button is at the bottom.

You can also add a lunch break in your practitioners' schedules. This is done the same way, with the exception of the duration, which in this case is non-zero.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default)

Active Patient: None April 10, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transect Summary Encounter Charges

Administrator	B Black	G Green
8:00	8:00	8:00
	8:30 IN	
	8:45	
	9:00	
	9:15	
9:30 IN	9:30	
9:45	9:45	
10:00	10:00	
10:15	10:15	
10:30	10:30	
10:45	10:45	
11:00	11:00	
11:15	11:15	
11:30	11:30	
11:45	11:45	
12:00	12:00 LUNCH	
12:15		
12:30		

Active Patient: None

Active Encounter: None

Popups

Find:
by: Name ID
SSN DOB

Logout

Done

The screenshot displays the OpenEMR interface on a Mozilla Firefox browser. The main window shows a calendar for April 10, 2009, with three practitioners listed: Administrator, B Black, and G Green. The B Black row contains several entries, including 'IN' at 8:30, a lunch break from 12:00 to 12:15, and 'OUT' at 12:30. The Administrator and G Green rows are currently empty. On the left side, there is a sidebar with various menu options like Calendar, Password, Reports, etc., and a search bar for finding patients by Name, ID, SSN, or DOB. A 'Logout' link is also present in the sidebar.

Now you can see your practitioner's full schedule laid out on the Calendar page. Continue setting up the Calendar in this fashion until all your practitioners' schedules have been entered.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: None April 10, 2009

Top Bot All Users 2009-04-10 Day View Go Today Add Search

Administrator Betty Black All Facilities <> Friday, April 10, 2009 >>

Administrator	B Black	G Green
8:00	8:00	8:00 IN
		8:15
	8:30 IN	8:30
	8:45	8:45
	9:00	9:00
	9:15	9:15
9:30 IN	9:30	9:30
9:45	9:45	9:45
10:00	10:00	10:00
10:15	10:15	10:15
10:30	10:30	10:30
10:45	10:45	10:45
11:00	11:00	11:00 LUNCH
11:15	11:15	
11:30	11:30	

Active Patient: None
Active Encounter: None
Popups

Find:
by: Name ID
SSN DOB

Logout

Done

Making Appointments

Now that the clinic and all its practitioners are set up, you can begin scheduling appointments for your patients.

To locate a patient in the system, enter all or part of their name into the search field in the bottom left corner of the screen (below the navigation list) and click 'Name'. This will bring up a list of all the patients in your system matching that name. If you need to narrow the list, you can enter a longer search term, such as their full name (Eg. "rourk, rod").

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: None April 10, 2009

Top Bot

[Help] Showing 1 of 1 records found.

Name	Phone	SS	DOB	ID	PID	[Number Of Encounters]	[Days Since Last Encounter]	[Date of Last Encounter]	[90 Days From Last Encounter]
Roark, Rod	503-456-7890	111-22-3333	08/06/1985	1	1	0			

Active Patient: None
Active Encounter: None
Popups

Find: roark
by: Name ID SSN DOB

Logout

Done

Click on the desired name to bring up the Demographics summary for that patient. If you have the patient on the phone, now would be a good time to confirm that their contact and insurance information is up to date. If the patient is not already in the system, you can select 'New Pt.' from the menu to begin entering their information.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 10, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Add Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
External ID: 1
Sex: Male
License/ID: 1234567
Balance Due: \$0.00
Upcoming Appointments
New Appointment

Contact Marital Status: Married
User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Contact: Wife
Home Phone: 503-456-7890
Mobile Phone: 971-564-7896

Choices Emergency Phone: 971-222-3333
Work Phone: 503-112-3334
Contact Email: mr.rod@gmail.com
Provider: Betty Black
HIPAA Notice Received: YES
Allow Voice Message: YES
Allow Mail Message: NO
Allow Email: YES
Occupation: Engineer
Employer: Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland
Allow SMS: NO
Leave Message With: wife
Employer Name: NW Company

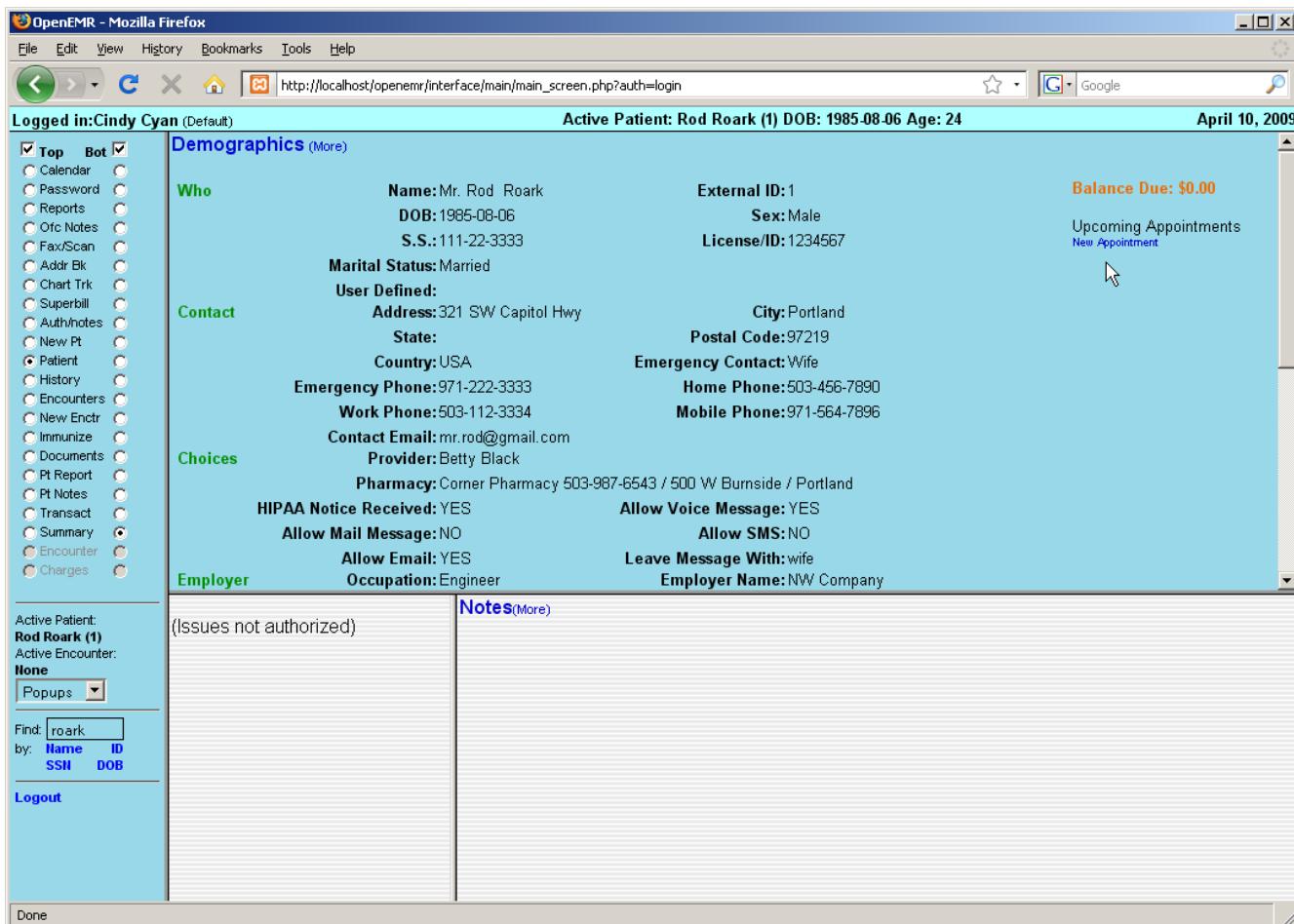
Notes (More)
(Issues not authorized)

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find: roark
by: Name ID SSN DOB

Logout

Done



The right-hand side of the Demographics summary shows a list of all current and future appointments for that patient. Click 'New Appointment' to schedule an office visit.

Add New Event - Mozilla Firefox

http://localhost/openemr/interface/main/calendar/add_edit_event.php?patientid=1

Category: Office Visit

All day event Time : PM

Date: 2009-04-10

Title: Office Visit

Facility: Your Clinic Name Here

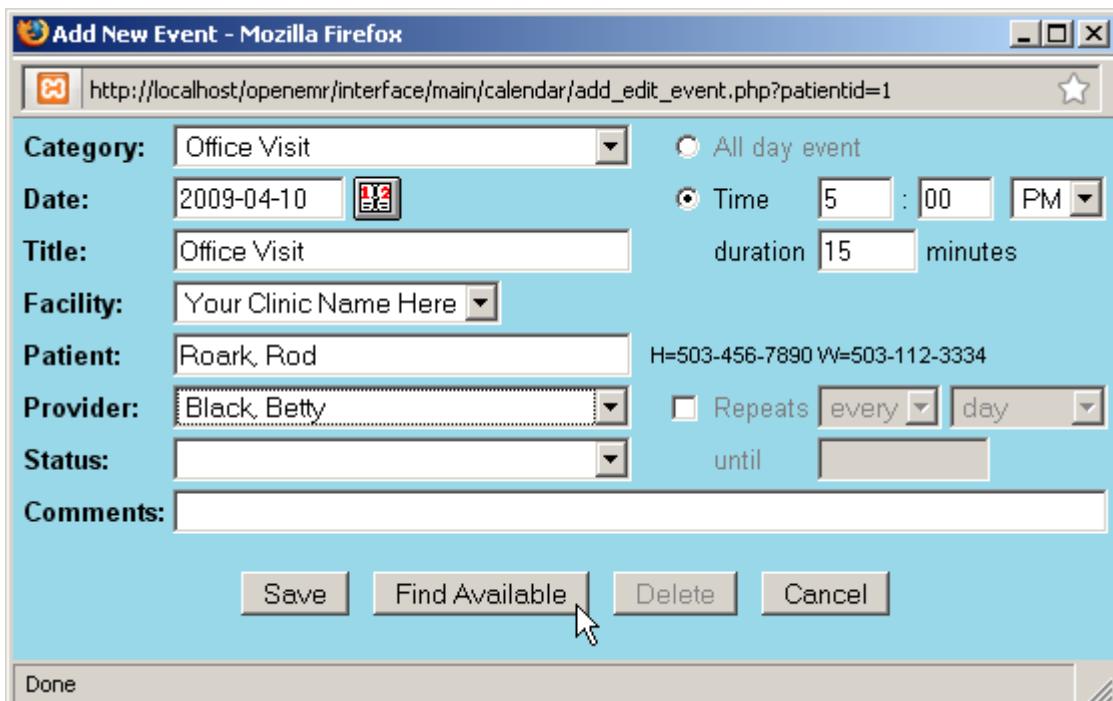
Patient: Roark, Rod H=503-456-7890 W=503-112-3334

Provider: Black, Betty Repeats every day

Status: until

Comments:

Done



This will present you with the same 'Add New Event' dialog used earlier. This time select "Office Visit" as the Category. If a primary provider has been entered for that patient, they will be selected automatically.

Click 'Find Available' to see a list of appointment times available for that provider for the next 7 days. You can change the start date or the number of days shown and click 'Search' to display a new list using those parameters.

The screenshot shows a Firefox browser window titled "Find Available Appointments - Mozilla Firefox". The address bar contains the URL "http://localhost/openemr/interface/main/calendar/find_appt_popup.php?providerid=3&catid=...". The main content area is a table titled "Available Times" with columns for "Day" and "Available Times". The table lists dates from April 10 to April 16, 2009, with times from 8:30 AM to 4:45 PM. The 9:30 AM slot for Wednesday, April 15, is highlighted in yellow and has a tooltip "Choose 09:30 am" pointing to it. The other times are listed in blue.

Day	Available Times
Friday 2009-04-10	AM 8:30 8:45 9:00 9:15 9:30 9:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30 11:45
Monday 2009-04-13	PM 1:00 1:15 1:30 1:45 2:15 2:30 2:45 3:00 3:15 3:30 3:45 4:00 4:15 4:30 4:45
Tuesday 2009-04-14	AM 8:30 8:45 9:00 9:15 9:30 9:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30 11:45
Wednesday 2009-04-15	PM 1:00 1:15 1:30 1:45 2:00 2:15 2:30 2:45 3:00 3:15 3:30 3:45 4:00 4:15 4:30 4:45
Thursday 2009-04-16	AM 8:30 8:45 9:00 9:15 9:30 9:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30 11:45

Once a date and time have been agreed upon, selecting that time from the list will close the window, and the selected time will appear in the 'Add Event' dialog.

Edit Event - Mozilla Firefox

http://localhost/openemr/interface/main/calendar/add_edit_event.php?eid=14

Category: Office Visit

All day event

Date: 2009-04-15

Time 9 : 30 AM

Title: Office Visit duration 15 minutes

Facility: Your Clinic Name Here

Patient: Roark, Rod H=503-456-7890 W=503-112-3334

Provider: Black, Betty Repeats every day

Status: until 0000-00-00

Comments:

Last update by Cindy Cyan

Done

Make sure to enter the correct duration for the appointment and click 'Save'.

Return to the calendar using the navigation menu on the left. Advancing to the appropriate date, using the arrows to the right of the current date ('>>'), shows the new appointment listed in the provider's schedule. Mousing over the appointment displays a tool-tip with information about that patient, such as date of birth.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 10, 2009

Top Bot All Users 2009-04-15 Day View Go Today Add Search

Administrator Betty Black All Facilities << Wednesday, April 15, 2009 >>

Administrator	B Black	G Green
8:00	8:00	8:00 IN
		8:15
	8:30 IN	8:30
	8:45	8:45
	9:00	9:00
	9:15	9:15
9:30 IN	9:30 09:30-Roark,Rod	9:30
9:45	9:45	9:45
10:00	10:00	10:00
10:15	10:15	10:15
10:30	10:30	10:30
10:45	10:45	10:45
11:00	11:00	11:00 LUNCH
11:15	11:15	

Active Patient: Rod Roark (1)
Active Encounter:
None
Popups

Find: roark
by: Name ID
SSN DOB

Logout

javascript:goPid(1)

The screenshot shows a day view calendar for April 10, 2009. The calendar grid has three columns: 'Administrator', 'B Black', and 'G Green'. The 'Administrator' column is pink, 'B Black' is light blue, and 'G Green' is light red. The grid shows time slots from 8:00 to 11:15. A specific appointment at 9:30 is highlighted with a blue border and contains the text '09:30-Roark,Rod'. The status bar at the bottom left of the interface displays the JavaScript command 'javascript:goPid(1)'.

Appointment Status

OpenEMR's calendar system includes a status indicator, allowing doctors and staff to see at a glance what is going on with all appointments and the corresponding encounters for the day.

To change the status of a given appointment, click on the time portion of the appointment line (to the immediate left of the patient's name). This brings up the 'Edit Event' window. Choose the correct appointment status from the drop-down list. Notice each status has a unique symbol associated with it.

Edit Event - Mozilla Firefox

http://localhost/openemr/interface/main/calendar/add_edit_event.php?date=20090415&eid=14

Category:	Office Visit	<input type="radio"/> All day event
Date:	2009-04-15	<input checked="" type="radio"/> Time 9 : 30 AM
Title:	Office Visit	duration 15 minutes
Facility:	Your Clinic Name Here	
Patient:	Roark, Rod H=503-456-7890 W=503-112-3334	
Provider:	Black, Betty	<input type="checkbox"/> Repeats every day until 0000-00-00
Status:		
Comments:	<ul style="list-style-type: none"> * Reminder done + Chart pulled x Cancelled ? No show @ Arrived ~ Arrived late <input type="button" value="Appointment status"/>	
<input type="button" value="Delete"/> <input type="button" value="Cancel"/>		
<input type="button" value="Done"/>		

You can also type a note into the 'Comments' line if more information is needed. Click 'Save' to update the status of the appointment.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 10, 2009

http://localhost/openemr/interface/main/main_screen.php?auth=login

All Users		2009-04-15	DayView	Go	Today	Add	Search
<input checked="" type="checkbox"/> Top	<input checked="" type="checkbox"/> Bot						
<input type="checkbox"/> Calendar	<input type="checkbox"/>						
<input type="checkbox"/> Password	<input type="checkbox"/>						
<input type="checkbox"/> Reports	<input type="checkbox"/>						
<input type="checkbox"/> Ofc Notes	<input type="checkbox"/>						
<input type="checkbox"/> Fax/Scan	<input type="checkbox"/>						
<input type="checkbox"/> Addr Bk	<input type="checkbox"/>						
<input type="checkbox"/> Chart Trk	<input type="checkbox"/>						
<input type="checkbox"/> Superbill	<input type="checkbox"/>						
<input type="checkbox"/> Auth/notes	<input type="checkbox"/>						
<input type="checkbox"/> New Pt	<input type="checkbox"/>						
<input checked="" type="checkbox"/> Patient	<input type="checkbox"/>						
<input type="checkbox"/> History	<input type="checkbox"/>						
<input type="checkbox"/> Encounters	<input type="checkbox"/>						
<input type="checkbox"/> New Enctr	<input type="checkbox"/>						
<input type="checkbox"/> Immunize	<input type="checkbox"/>						
<input type="checkbox"/> Documents	<input type="checkbox"/>						
<input type="checkbox"/> Pt Report	<input type="checkbox"/>						
<input type="checkbox"/> Pt Notes	<input type="checkbox"/>						
<input type="checkbox"/> Transact	<input type="checkbox"/>						
<input type="checkbox"/> Summary	<input type="checkbox"/>						
<input type="checkbox"/> Encounter	<input type="checkbox"/>						
<input type="checkbox"/> Charges	<input type="checkbox"/>						

Administrator B Black G Green

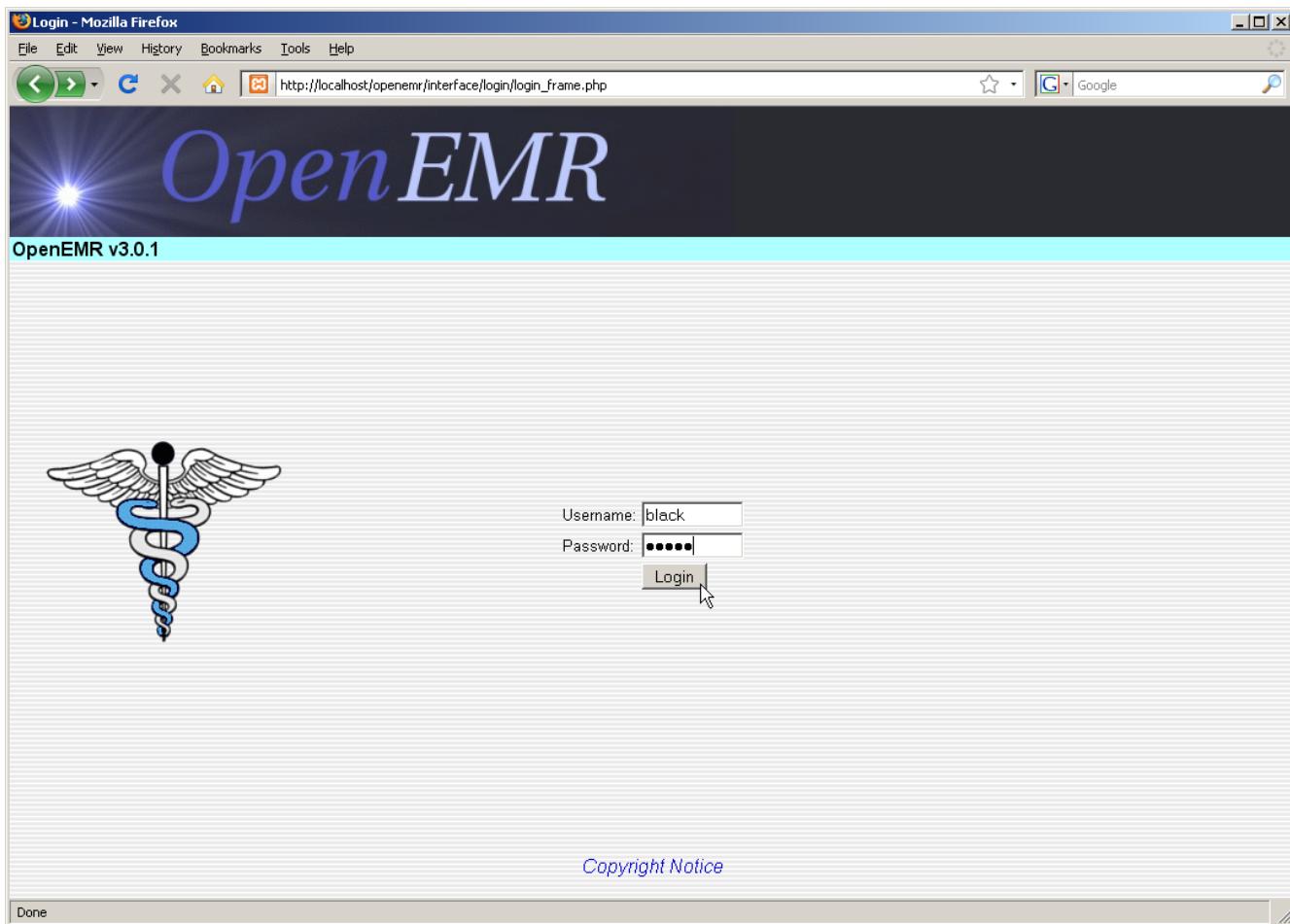
8:00		8:00		8:00 IN
				8:15
		8:30 IN		8:30
		8:45		8:45
		9:00		9:00
		9:15		9:15
	9:30 IN	9:30 09:30*Rod Roark		9:30
	9:45	9:45		9:45
	10:00	10:00	Age 24 (1985-08-06) Reminded 4/10 5PM	10:00
	10:15	10:15		10:15
	10:30	10:30		10:30
	10:45	10:45		10:45
	11:00	11:00		11:00 LUNCH
	11:15	11:15		

Active Patient: Rod Roark (1)
Active Encounter: None
Popups
Find: roark by: Name ID SSN DOB
Logout

Mousing over the appointment in the calendar now shows the note that was added to it, and the symbol next to the appointment time has changed to indicate its new status.

Encounters & Coding

Patient encounters are handled primarily by a clinics providers.



Logging in as a provider presents you with the Calendar page showing only that provider's schedule by default. To view another provider's schedule, select the desired user from the list at the top left of the page and click 'Go'.

The bottom window also shows any notes left for that provider about their patients.

The Calendar shows the appointments scheduled for that day. Providers can see the status of any given appointment, indicated by the symbol show between the appointment time and the patient's name. The "@" symbol, for example, indicates that the patient has arrived at the clinic and is ready to begin their appointment.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: None April 17, 2009

2009-04-15 Day View Go Today Add Search

All Users Administrator Betty Black All Facilities << Wednesday, April 15, 2009 >>

B Black

8:00
8:30 IN
8:45
9:00
9:15
9:30 09:30@Roark,Rod
9:45
10:00
10:15
10:30
10:45
11:00
11:15
11:30

Patient Notes (See All) and Authorizations (More)

Active Patient: None
Active Encounter: None
Popups

Find: by: Name ID SSN DOB

Logout Done

Opening a New Encounter

To begin the encounter, click on the patients name in the Appointment Calendar. This brings you to the patient's Demographics page, as well as the Patient Summary page which list any notes specific to that patient, and any medical issues, medications, etc. for that patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Demographics (More)

Top Bot

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
User Defined:

Contact Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black

Choices Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland

HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife

Employer Occupation: Engineer Employer Name: NW Company

Medical Problems (More) Notes (More)

Immunizations (More)

Prescriptions

Upcoming Appointments
New Appointment Friday, 2009-04-17
9:30 am Office Visit
Betty Black

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find:
by: Name ID
 SSN DOB

Logout Done

Select 'History' from navigation menu to view a summary of the patients Medical History and Lifestyle information. Click 'Patient History / Lifestyle (more)' to enter any information that may be incomplete.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Patient History / Lifestyle (More)

General	Risk Factors:	Exams/Tests:
Family History	Father: 84 good health Siblings: Offspring:	Mother: Spouse:
Relatives	Cancer: paternal aunt Diabetes: mother Heart Problems: maternal grandfather Epilepsy: Suicide:	Tuberculosis: High Blood Pressure: Stroke: Mental Illness:
Lifestyle	Coffee: 2 cups/day Alcohol: Exercise Patterns: Counseling:	Tobacco: Sleep Patterns: Seatbelt Use: Hazardous Activities:
Other	Name/Value:	Name/Value:
Medical Problems (More)		Notes (More)
Immunizations (More)		
Prescriptions		

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find: by: Name ID SSN DOB

Logout Done

When you're done, select 'Encounters' from the navigation menu on the left. (In Tree View go to 'Patient/Client – Visits – List') This displays a list of all encounters that have been entered for this patient. For new patients, there may be no encounters listed.

By default, OpenEMR is set to generate an empty Encounter when a patient's status has been set to "Arrived (@)". To open this encounter and begin entering data, click on the new entry in the Encounters list, then click on 'Patient Encounter' next to the provider's name.

If your clinic's version of OpenEMR is configured differently, you can begin a New Encounter manually by selecting 'New Encntr' (or 'New Visit') from the navigation list on the left.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Past Encounters and Documents [\(To Billing View\)](#)

Date	Issue	Reason/Form	Provider	Billing	Insurance
2009-04-17			black		Primary: Pacific Health
2009-04-10		Document: insurance_card.jpg.1 (Insurance Card)			

Top Bot

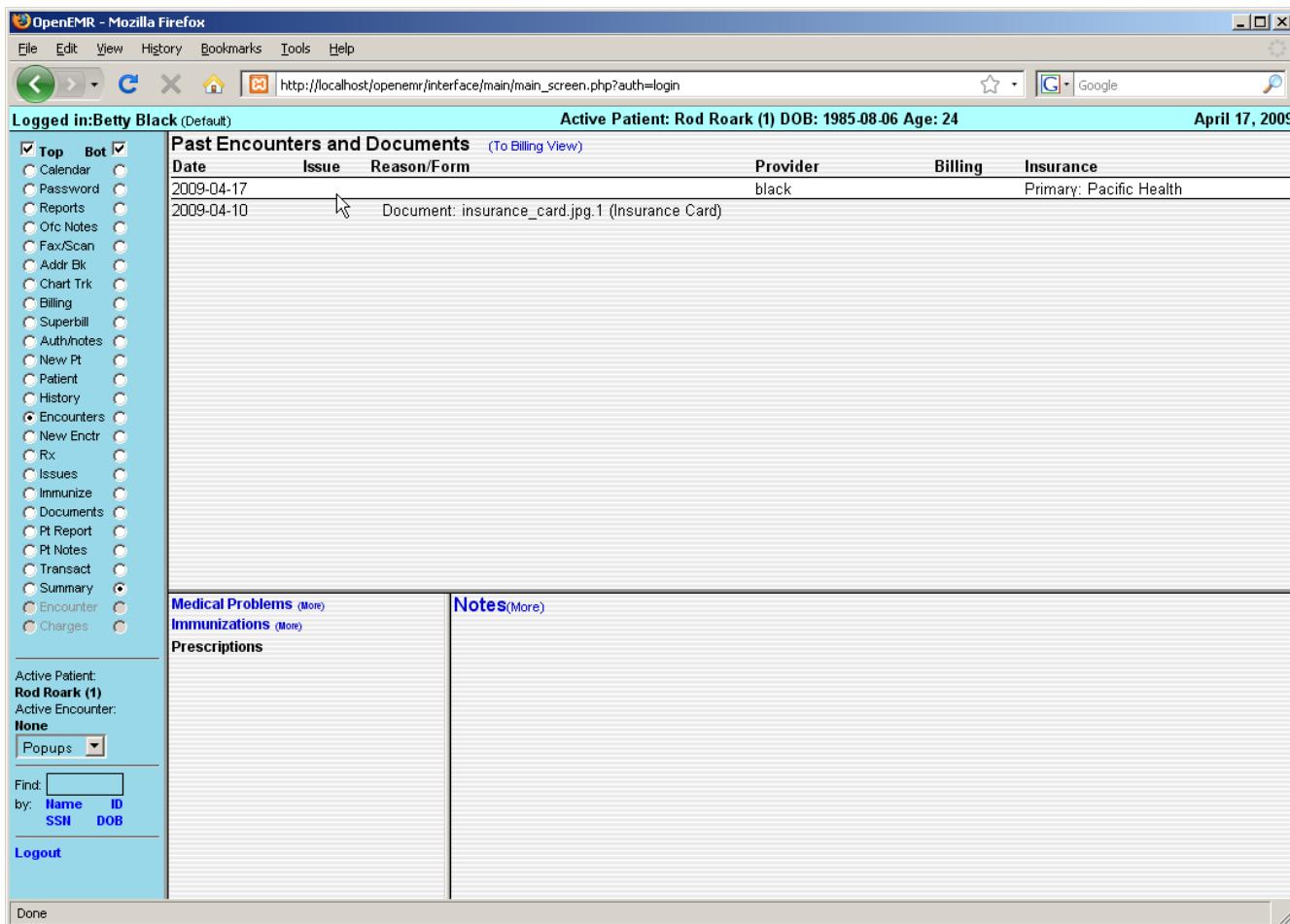
Calendar Password
 Reports Ofc Notes
 Ofc Notes Fax/Scan
 Addr Blk Chart Trk
 Billing Superbill
 Auth/Notes New Pt
 Patient History
 Encounters New Enctr
 Rx Issues
 Immunize Documents
 Pt Report Pt Notes
 Pt Notes Transact
 Transact Summary
 Encounter Charges

Active Patient:
Rod Roark (1)
Active Encounter:
None
Popups

Find:
by: Name ID
 SSN DOB

[Logout](#)

Done



Both methods will bring you to the New Encounter Form.

Here you can enter a brief description of the encounter and the date of service. Encounters for new patients will not have any Issues or Diagnoses associated with them at this time, so click 'Save' to continue with the encounter.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

New Encounter Form

Consultation Brief Description: cough & chest congestion

Visit Category: New Patient Facility: Your Clinic Name Here

Sensitivity: Normal Date of Service: 2009-04-17

Onset/hosp. date: 2009-04-17

[Save] [Add Issue]

To link this encounter/consult to an existing issue, click the desired issue above to highlight it and then click [Save]. Hold down <Ctrl> to select multiple issues.

Medical Problems (More) Notes (More)

Immunizations (More)

Prescriptions

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find: by: Name ID
SSN DOB

Logout

Done

Encounter Forms

This will bring you back to the summary page for This Encounter. Displayed is a list of all the forms associated with this encounter. You may click on the name of any of these forms to edit its contents.

To the right is a drop-down list of forms that can be added to the encounter. OpenEMR comes configured with several common encounter forms by default, but your clinic may have their own customized encounter forms as well.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

Betty Black Patient Encounter

category

New Encounter Form

Review of Systems Checks

Speech Dictation

SOAP

Vitals

Review Of Systems

Fee Sheet

Misc Billing Options HCFA

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find:
by: Name ID SSN DOB

Logout

Done

Medical Problems (More)
Immunizations (More)
Prescriptions

Notes (More)

Select 'SOAP' from the drop-down list to add it to the encounter.

The SOAP form will contain a subjective & objective record of the patient's vital information, as well as any notes on the assessment of the patient's health and suggested treatment plans.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Encr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

SOAP

Subjective: subjective description goes here

Objective: clinical observations go here

Assessment: doctor's assessment goes here

Plan: patient's treatment plan goes here

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find: by: Name ID SSN DOB

Logout Done

Save Form [\[Don't Save\]](#)

The screenshot shows the OpenEMR software interface for creating a SOAP note. On the left, there is a vertical navigation menu with various medical record management options like Calendar, Password, Reports, etc. Below that is a summary bar showing the active patient (Rod Roark), date of birth (1985-08-06), age (24), and the date (April 17, 2009). The main area is titled 'SOAP' and contains four large text input boxes labeled 'Subjective', 'Objective', 'Assessment', and 'Plan'. Each box has a placeholder text: 'subjective description goes here', 'clinical observations go here', 'doctor's assessment goes here', and 'patient's treatment plan goes here'. At the bottom of the form area, there is a 'Save Form' button with a tooltip '[Don't Save]' and a 'Done' button.

Enter the appropriate information and click 'Save Form' to return to the Encounter summary page.

You'll see that the SOAP form has been added to the list of forms for this encounter. Also shown is a summary of its contents.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Betty Black SOAP

Betty Black Patient Encounter

category

Medical Problems (More)
Immunizations (More)
Prescriptions

Notes (More)

Active Patient:
Rod Roark (1)
Active Encounter:
2009-04-17
Popups

Find:
by: Name ID
SSN DOB

Logout

Done

Using the Fee Sheet

Next select the 'Fee Sheet' from the drop-down list. The Fee Sheet is different from most other forms in that it enters and modifies billing information that is stored elsewhere in the system; it is not really an encounter form, and when used it will not appear in the encounter's list of forms.

You can select 'Charges' (under 'Fees' in tree view) from the navigation menu on the left to see where information from the Fee Sheet will be displayed.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

New Patient Established Patient

Search Results (0 items)

Add Copy Search ICD9 CPT4 HCPCS for [] Search

Type Code Mod Price Units Justify Auth Delete Description

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding		Billing (More) Justify/Save
<input type="radio"/> Superbill <input type="radio"/> ICD9 Search <input type="radio"/> CPT4 Search <input type="radio"/> HCPCS Search <input type="radio"/> Copay <input type="radio"/> Other		[Receipt]
Prescriptions List Prescriptions Add Prescription		

Active Patient: Rod Roark (1)
 Active Encounter: 2009-04-17
 Popups
 Find: []
 by: Name ID SSN DOB
 Logout
 Done

The Fee Sheet includes several drop-down lists of the most commonly used billing codes. It can and should be customized so that it's most suitably adapted to your practice;

Included is a search feature, where you can search for and select from the thousands of billing codes in the database. And below that is a list of all the billing codes, along with their charges and other related information, that have been selected for this encounter.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

New Patient Established Patient

New Patient Brief Limited Detailed Extended Comprehensive

HCPCS for Search

Justify Auth Delete Description

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

Superbill ICD9 Search CPT4 Search HCPCS Search Copay Other

Billing (More) Justify/Save [Receipt]

Prescriptions

List Prescriptions Add Prescription

Active Patient: Rod Roark (1)
Active Encounter:
2009-04-17
Popups

Find:
by: Name ID SSN DOB

Logout Done

The screenshot shows the 'Fee Sheet' section of the OpenEMR interface. In the 'New Patient' dropdown menu, the 'Detailed' option is highlighted with a mouse cursor. The 'HCPCS for' search bar and buttons for 'Justify', 'Auth', 'Delete', and 'Description' are visible below the dropdown. On the left, a sidebar lists various medical and administrative functions like 'Calendar', 'Password', 'Reports', etc. The bottom left contains patient information (Rod Roark, DOB 1985-08-06), a 'Popups' dropdown, and search/filter fields for 'Name', 'ID', 'SSN', and 'DOB'. A 'Logout' link is at the bottom.

For example, select 'Detailed' from the "New Patient" drop-down list. The associated CPT code now appears on the list.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

Top Bot

New Patient Established Patient

Search Results (0 items)

Add Copy Search ICD9 CPT4 HCPCS for Search

Type	Code	Mod	Price	Units	Justify	Auth	Delete	Description
CPT4	99203		136.57	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

Prescriptions

List Prescriptions Add Prescription

Billing (More) Justify/Save [Receipt]

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups Find: by: Name ID SSN DOB

Logout Done

The screenshot shows the OpenEMR Fee Sheet interface. At the top, it displays the active patient as Rod Roark (1) with a DOB of 1985-08-06 and an age of 24, dated April 17, 2009. On the left, there's a sidebar with various menu options like Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter (selected), and Charges. Below the sidebar, it shows the active patient and encounter details, a find bar, and a logout link. The main area is titled 'Fee Sheet' and contains a table for entering billing codes. The table has columns for Type, Code, Mod, Price, Units, Justify, Auth, Delete, and Description. A row is currently selected for 'CPT4 99203' with a price of '136.57' and units '1'. There are checkboxes for Justify and Delete. Below the table are buttons for Price Level (Standard), Provider (Black, Betty), Save, Refresh, and Cancel. To the right of the table, there are links for Billing (More) and Justify/Save, and a button for Receipt. On the far right, there's a scroll bar. The bottom of the interface has a 'Done' button.

Look for an appropriate billing code by entering a search term in the box to the left of the 'Search' button. Make sure the correct code type is selected and click 'Search'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

Top Bot

New Patient Established Patient

Search Results (0 items)

Add Copy Search ICD9 CPT4 HCPCS for rhinitis

Type Code Mod Price Units Justify Auth Delete Description

CPT4 99203 136.57 1

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

Superbill
ICD9 Search
CPT4 Search
HCPCS Search
Copay
Other

Prescriptions

List Prescriptions Add Prescription

Billing (More) Justify/Save [Receipt]

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find: by: Name ID SSN DOB

Logout Done

The screenshot shows the OpenEMR Fee Sheet interface. At the top, there's a navigation bar with links like File, Edit, View, History, Bookmarks, Tools, and Help. Below that is a toolbar with icons for New Patient, Established Patient, and a search field for 'Search Results (0 items)'. A search button is labeled 'Search' with a magnifying glass icon. Below the toolbar, there's a table header with columns: Type, Code, Mod, Price, Units, Justify, Auth, Delete, and Description. A row is shown with 'CPT4 99203' in the Code column, '136.57' in the Price column, and '1' in the Units column. There are checkboxes for Justify, Auth, and Delete. Below the table, there are buttons for Price Level (Standard), Provider (Black, Betty), Save, Refresh, and Cancel. On the left side, there's a sidebar with a list of links: Top, Bot, Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter (selected), and Charges. Below the sidebar, it says 'Active Patient: Rod Roark (1)' and 'Active Encounter: 2009-04-17'. There's also a 'Popups' dropdown and a 'Find' field with options for Name, ID, SSN, and DOB. At the bottom, there are 'Logout' and 'Done' buttons.

A drop-down list will then be populated with any billing codes that match your search parameters. Selecting the desired code from the list will add it to the list of codes for this encounter.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

New Patient Established Patient

Search Results (6 items)

472.0 Chronic rhinitis
477 Allergic rhinitis
477.1 Allergic rhinitis, food
477.2 Allergic rhinitis, animal hair/dander
477.8 Allergic rhinitis, other allergen
477.9 Allergic rhinitis, unspecified

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

Superbill
ICD9 Search
CPT4 Search
HCPCS Search
Copay
Other

Billing (More) Justify/Save

Prescriptions

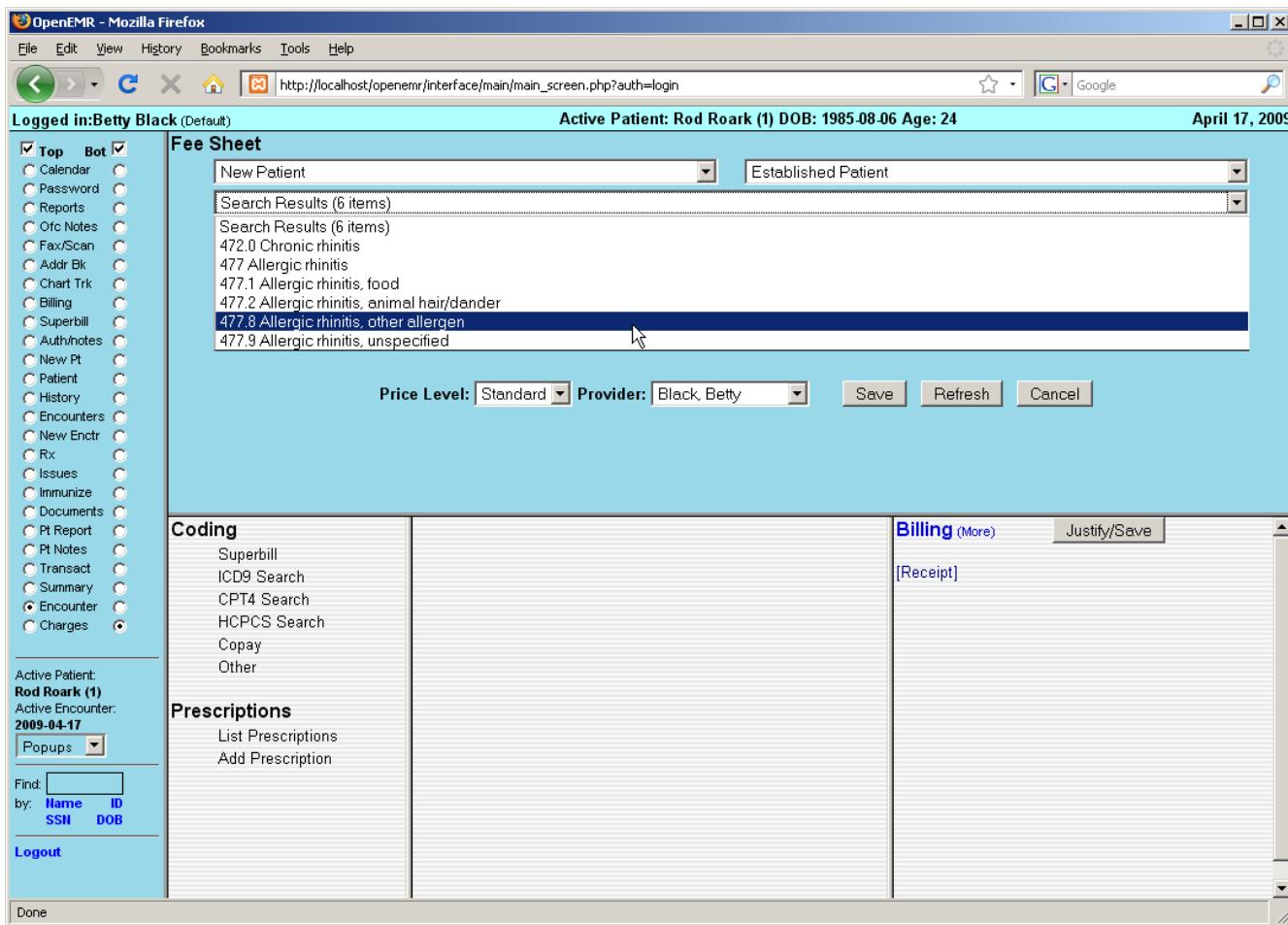
List Prescriptions Add Prescription

[Receipt]

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find: by: Name ID SSN DOB

Logout Done



The Fee Sheet also allows you to justify the selected codes for billing purposes. Justification is the association of ICD9 codes with procedure codes. Insurance companies require this for billing, in order to "justify" paying for procedures.

To do this, click the drop-down menu under 'Justify' for the desired CPT code. Select the appropriate ICD9 code from the list and click 'Save'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

New Patient Established Patient

Search Results (0 items)

Add Copay Search ICD9 CPT4 HCPCS for [] Search

Type	Code	Mod	Price	Units	Justify	Auth	Delete	Description
CPT4	99203		136.57	1	477.8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Allergic rhinitis, other allergen
ICD9	477.8					<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

Prescriptions

- List Prescriptions
- Add Prescription

Billing (More) Justify/Save [Receipt]

Find: by: Name ID SSN DOB

Logout Done

To see the Fee Sheet has been associated with this encounter, click 'Encounters' in the navigation menu to go to the list of encounters for this patient. You can see that the CPT & ICD9 codes are listed next to the new encounter, as well as the SOAP form that was added earlier.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

Betty Black SOAP

Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Betty Black Patient Encounter

category

Past Encounters and Documents [\(To Billing View\)](#)

Date	Issue	Reason/Form	Provider	Billing	Insurance
2009-04-17	cough & chest congestion	black	99203	477.8	Primary: Pacific Health
2009-04-10	SOAP				
	Document: insurance_card.jpg.1 (Insurance Card)				View encounter 1,23

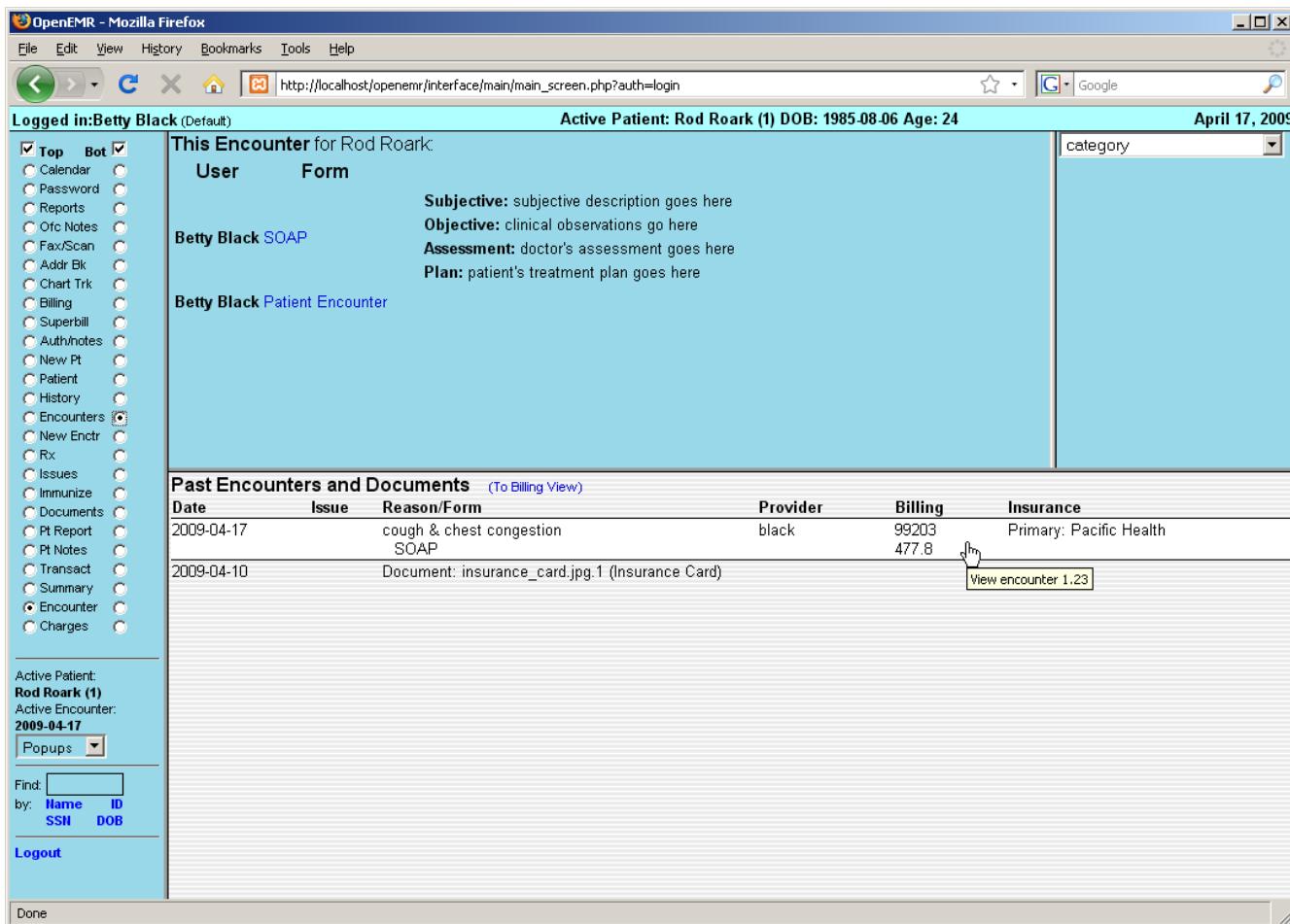
Active Patient:
Rod Roark (1)
Active Encounter:
2009-04-17

Popups

Find:
by: Name ID
 SSN DOB

Logout

Done



Return to the Charges page to see a more detailed view of billing codes for this encounter. If you did not justify these codes in the previous step, you can do so now by selecting the checkboxes next to the codes you wish to associate and click 'Justify/Save'. This will also refresh the display in the Billing window.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

Betty Black SOAP

Betty Black Patient Encounter

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

Prescriptions

List Prescriptions

Add Prescription

Billing (More) Justify/Save

[Receipt]

CPT4 99203 136.57
total: 136.57

ICD9 477.8 Allergic Rhinitis, Other Allergen

Find:
by: Name ID SSN DOB

Logout Done

The screenshot shows the OpenEMR medical record system. On the left, a navigation menu is open with various links like Top, Bot, Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Encr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Below this is a sidebar with Active Patient (Rod Roark), Active Encounter (2009-04-17), Popups dropdown, Find input, and Logout/Done buttons. The main area has tabs for User Form, Betty Black SOAP, and Betty Black Patient Encounter. Under Coding, there are links for Superbill, ICD9 Search, CPT4 Search, HCPCS Search, Copay, and Other. Under Prescriptions, there are links for List Prescriptions and Add Prescription. On the right, the Billing section shows a receipt with CPT4 code 99203 at 136.57 and ICD9 code 477.8 for Allergic Rhinitis, Other Allergen.

You can see that the ICD9 code has now been associated with the appropriate CPT procedure, as indicated by the code in parentheses to the right.

Adding Prescriptions

To prescribe medication for this patient select 'Rx' from the navigation menu on the left (under 'Patient/Client – Medical Record' in Tree View) and click 'Add Prescription'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

Betty Black SOAP

Betty Black Patient Encounter

Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Coding

Currently Active

Starting Date April 17 2009

Provider Betty Black

Drug Drug Lookup

Quantity

Medicine Units

Take in

Refills 00 # of tablets: 0

Notes

Add to Medication List No Yes substitution allowed

Billing (More) Justify/Save

[Receipt] 99203 136.57 (477.8)
CPT4 total: 136.57

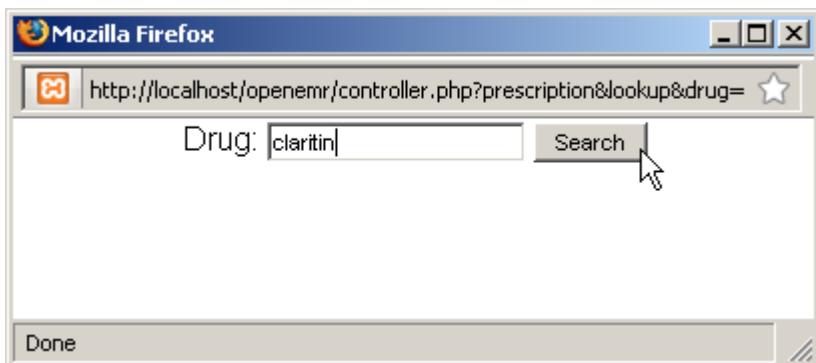
ICD9 477.8 Allergic Rhinitis, Other Allergen

Find:
by: Name ID SSN DOB

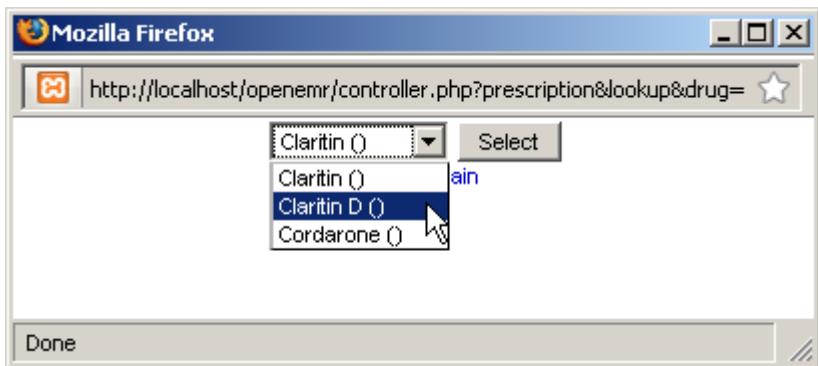
Logout Done

This presents you with a form for entering prescription data, including dosage, refills, and whether or not generic over-the-counter substitutions are allowed for this patient.

The Prescription form includes a search function for looking up a particular type of medication. To use this function click 'Drug Lookup'. A box will pop up into which a search term may be entered.



Clicking 'Search' displays a drop-down list of possible medications generated by connecting to the web site www.rxlist.com.



Select the desired medication to return to the Prescription form. The selected medication has now been filled in for you. Also, clicking 'Yes' next to "Add to Medication List" will allow the prescription to be included in the Issues list as a Medication.

Enter the correct data to complete the form and click 'Save'.

A screenshot of the OpenEMR software interface. The top status bar shows 'Logged in: Betty Black (Default)', 'Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24', and the date 'April 17, 2009'. The main window contains several sections: 'This Encounter for Rod Roark' (User Form), 'Subjective: subjective description goes here', 'Objective: clinical observations go here', 'Assessment: doctor's assessment goes here', 'Plan: patient's treatment plan goes here', 'Betty Black Patient Encounter', 'Coding' (with Superbill, ICD9 Search, CPT4 Search, HCPCS Search, Copay, Other buttons), 'Prescriptions' (List Prescriptions, Add Prescription), 'Billing (More)' (Receipt, CPT4 code 99203 136.57 (477.8), total: 136.57), and 'ICD9' (code 477.8 Allergic Rhinitis, Other Allergen). On the left, a sidebar lists various medical functions like Top, Bot, Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. A 'Find' field and 'Logout' button are also present.

You are then presented with a form for generating a PDF of the prescription information. It may be printed or sent by email or fax. "Auto Send" will use whichever default method was selected when you set up the pharmacy.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Betty Black SOAP

Betty Black Patient Encounter

category

Coding

Print

Email

Fax 503-987-6544

Auto Send Corner Pharmacy Portland, OR

Billing (More) Justify/Save

[Receipt]

CPT4 99203 136.57 (477.8)
total: 136.57

ICD9 477.8 Allergic Rhinitis, Other Allergen

Prescriptions

List Prescriptions

Add Prescription

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17

Popups

Find:
by: Name ID
SSN DOB

Logout

Done

Clicking 'Print (PDF)' will generate the following PDF document to be saved or printed as necessary. The default template for this form may also be customized to your clinic's own specifications.

controller.php (application/pdf Object) - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/controller.php?prescription&send&id=25

OpenEMR controller.php (application/pdf O...)

1 / 1 | Find

75% | Sign |

RX

Your Clinic Name Here
1234 SW Main St
Portland, OR 97205
Tel: 503-123-4567
Fax: 503-123-4568

Betty Black
DEA: _____

Patient Name & Address
Rod Roark
321 SW Capitol Hwy
Portland, 97219
503-456-7890

Date of Birth
08/06/1985

Medical Record #
0000000001

Prescriptions

Rx: Claritin D 100 mg [tablet] substitution allowed
Disp #: 20
Sig: 1 tablet per os q.d.

Refills: 2 of quantity 20

Signature: _____
Date: 2009-04-17

Done

Issues & Immunizations

Adding Issues

An "issue" is a medical problem, allergy, medication, surgery or dental issue. These issues are related in that they can all be associated with multiple encounters.

This is especially useful with medical problems, where the user may want to quickly determine which encounters treated a particular problem, or which problems were treated by a particular encounter.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The top bar displays 'OpenEMR - Mozilla Firefox' and the URL 'http://localhost/openemr/interface/main/main_screen.php?auth=login'. The main content area is titled 'Logged in: Betty Black (Default)'. It shows the 'Demographics' section for patient 'Rod Roark (1)'. The 'Who' section includes Name: Mr. Rod Roark, DOB: 1985-08-06, S.S.: 111-22-3333, Marital Status: Married, Sex: Male, External ID: 1, License/ID: 1234567, and Balance Due: \$136.57. The 'Contact' section includes Address: 321 SW Capitol Hwy, City: Portland, State: OR, Postal Code: 97219, Country: USA, Emergency Contact: Wife, Home Phone: 503-456-7890, Work Phone: 503-112-3334, Mobile Phone: 971-564-7896, Contact Email: mr.rod@gmail.com, Provider: Betty Black, and Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland. The 'Choices' section includes HIPAA Notice Received: YES, Allow Voice Message: YES, Allow Mail Message: NO, Allow SMS: NO, Allow Email: YES, Leave Message With: wife, and Occupation: Engineer. The 'Employer' section includes Employer Name: NW Company. On the left sidebar, under 'Patient/Client – Medical Record', the 'Issues' link is highlighted. The bottom left corner shows the active patient 'Rod Roark (1)' and active encounter 'None'. The bottom status bar shows the URL 'http://localhost/openemr/interface/patient_file/summary/stats_full.php?active=all'.

From the patient's Summary page click 'Medical Problems (more)', or select 'Issues' from the navigation menu on the left ('Patient/Client – Medical Record – Issues') to display the Issues list.

You can now see the prescription added earlier has been included in the Issues list as a Medication. Click 'Add Issue' to add a new medical issue you want to keep track of for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Add Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transect Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
User Defined:

Contact Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland

HIPAA Notice Received: YES **Allow Voice Message:** YES
Allow Mail Message: NO **Allow SMS:** NO
Allow Email: YES **Leave Message With:** wife
Employer Occupation: Engineer **Employer Name:** NW Company

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
Medications								
	Claritin D	2009-04-17			Unknown or N/A			<input type="button" value="0"/>
<input type="button" value="Add Issue"/> <input type="button" value="Add Encounter"/> <input type="button" value="To History"/> <input type="button" value="Back"/>								

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find:
by: Name ID
 SSN DOB

[Logout](#)

Done

This pops up the 'Add Issue' dialog box.

The default issue type is set to 'Problem'. For each issue type there is a list of commonly selected titles which are customizable for your clinic's specific needs. If the desired title is not included, it can be typed into the text box below the list.

Enter the appropriate beginning and end dates, and select the 'Occurrence' from the drop-down list provided.

Add NewIssue - Mozilla Firefox

http://localhost/openemr/interface/patient_file/summary/add_edit_issue.php?issue=0

Type: Problem Allergy Medication Surgery Dental

HTN
asthma
diabetes
hyperlipidemia (Select one of these, or type your own title)

Title: bronchitis

Begin Date: 2009-04-17

End Date: (leave blank if still active)

Diagnosis:

Occurrence: Chronic/Recurrent

Referred by: Unknown or N/A

First

Outcome: Early Recurrence (<2 Mo) Us quo Worse Pending followup

Late Recurrence (2-12 Mo)

Delayed Recurrence (> 12 Mo)

Chronic/Recurrent

Acute on Chronic

Done

Clicking in the 'Diagnosis' field will present a search dialog for locating the correct ICD9 code for this issue. Enter the appropriate search term and click 'Search' to bring up a list of possible ICD9 codes. Selecting the desired code will close the search window and enter the selected code in the text field.

Code Finder - Mozilla Firefox

http://localhost/openemr/interface/patient_file/encounter/find_code_popup.php?codetype=I...

ICD9 Search for: rhinitis Search Erase

Code Description

472.0 Chronic rhinitis
477 Allergic rhinitis
477.1 Allergic rhinitis, food
477.2 Allergic rhinitis, animal hair/dander
477.8 Allergic rhinitis, other allergen
477.9 Allergic rhinitis, unspecified

Complete the remainder of the form as necessary and click 'Save'.

Add NewIssue - Mozilla Firefox

http://localhost/openemr/interface/patient_file/summary/add_edit_issue.php?issue=0

Type: Problem Allergy Medication Surgery Dental

HTN
asthma
diabetes
hyperlipidemia (Select one of these, or type your own title)

Title: bronchitis

Begin Date: 2009-04-17 

End Date:  (leave blank if still active)

Diagnosis: ICD9:477.8

Occurrence: Chronic/Recurrent 

Referred by:

Outcome: Resolved Improved Status quo Worse Pending followup

Destination:

 Save  Cancel

Done

Additional issues are entered in the same manner; clicking 'Add Issue' and selecting the appropriate type, such as 'Allergy'. Notice that the 'Add New Issue' dialog also uses the OpenEMR date selection tool described earlier.

Add NewIssue - Mozilla Firefox

http://localhost/openemr/interface/patient_file/summary/add_edit_issue.php?issue=0

Type: Problem Allergy Medication Surgery Dental

penicillin
sulfa
iodine
codeine

(Select one of these, or type your own title)

Title: penicillin

Begin Date: 2009-01-01

End Date:

Diagnosis:

Occurrence: Unknown or N/A

Referred by:

Outcome: Resolved

Destination:

Thu, Jan 1

Done

Once the new issues have been added successfully you should see an updated list of all the issues that have been entered for this patient. You may click on an issue in the list at any time to edit it.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Add Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Choices Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife
Employer Occupation: Engineer Employer Name: NW Company

Allergies

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	penicillin	2009-01-01			Unknown or N/A			0

Medical Problems

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	bronchitis	2009-04-17		ICD9:477.8 (Allergic rhinitis, other allergen)	Chronic/Recurrent			0

Medications

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	Claritin D	2009-04-17			Unknown or N/A			0

[Add Issue](#) [Add Encounter](#) [To History](#) [Back](#)

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find: r
by: Name ID SSN DOB

[Logout](#)

Done

Associating Issues with Encounters

The far right column in the Issues list represents the number of encounters associated with a given issue. Click on the '0' next to a newly added issue to bring up the 'Issues & Encounters' dialog.

This dialog contains a list of all the issues and encounters associated with this patient. It is used to set (and view) the relationships between issues and encounters. Note that the issue that was just clicked on has been highlighted.

Issues and Encounters - Mozilla Firefox

http://localhost/openemr/interface/patient_file/problem_encounter.php?issue=11

Issues and Encounters for Rod Roark (1)

Issues Section			Encounters Section	
Type	Title	Description	Date	Presenting Complaint
allergy	penicillin		2009-04-17	cough & chest congestion
medical_problem	bronchitis			
medication	Claritin D			

Instructions: Choose a section and click an item within it; then in the other section you will see the related items highlighted, and you can click in that section to add and delete relationships.

Save Add Issue Cancel 

Done

Select the appropriate encounter from the list on the right to highlight it. Clicking 'Save' now links the selected issue to the selected encounter.

Issues and Encounters - Mozilla Firefox

http://localhost/openemr/interface/patient_file/problem_encounter.php?issue=11

Issues and Encounters for Rod Roark (1)

Issues Section			Encounters Section	
Type	Title	Description	Date	Presenting Complaint
allergy	penicillin		2009-04-17	cough & chest congestion
medical_problem	bronchitis			
medication	Claritin D			

Instructions: Choose a section and click an item within it; then in the other section you will see the related items highlighted, and you can click in that section to add and delete relationships.

Save Add Issue Cancel

Done

Continue associating issues with encounters as necessary. Refreshing the Issues list shows the current information for all issues.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

[Top](#) [Bot](#)

[Calendar](#) [Password](#) [Reports](#) [Ofc Notes](#) [Fax/Scan](#) [Add Blk](#) [Chart Trk](#) [Billing](#) [Superbill](#) [Auth/Notes](#) [New Pt](#) [Patient](#) [History](#) [Encounters](#) [New Enctr](#) [Rx](#) [Issues](#) [Immunize](#) [Documents](#) [Pt Report](#) [Pt Notes](#) [Transact](#) [Summary](#) [Encounter](#) [Charges](#)

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find: r by: Name ID SSN DOB

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Choices Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife
Employer Occupation: Engineer Employer Name: NW Company

Allergies

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	penicillin	2009-01-01			Unknown or N/A			0

Medical Problems

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	bronchitis	2009-04-17		ICD9:477.8 (Allergic rhinitis, other allergen)	Chronic/Recurrent			1

Medications

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	Claritin D	2009-04-17			Unknown or N/A			0

[Add Issue](#) [Add Encounter](#) [To History](#) [Back](#)

Immunizations

Click 'Summary' on the left (under ('Patient/Client – Management') to return to the Patient Summary page. Now click 'Immunizations (more)' to add an immunization for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

[Top](#) [Bot](#)

[Calendar](#) [Password](#) [Reports](#) [Ofc Notes](#) [Fax/Scan](#) [Add Blk](#) [Chart Trk](#) [Billing](#) [Superbill](#) [Auth/Notes](#) [New Pt](#) [Patient](#) [History](#) [Encounters](#) [New Enctr](#) [Rx](#) [Issues](#) [Immunize](#) [Documents](#) [Pt Report](#) [Pt Notes](#) [Transact](#) [Summary](#) [Encounter](#) [Charges](#)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland

HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife
Employer Occupation: Engineer Employer Name: NW Company

Medical Problems (More)
bronchitis
Allergies (More)
penicillin
Medications (More)
Claritin D
Immunizations (More)
Prescriptions
Claritin D 1 in tablet q.d.

Notes (More)
Balance Due \$136.57

Find:
by: Name ID
 SSN DOB

Logout Done

This page contains a form for entering information on the any immunizations the patient has received.

Select the type of immunization from the drop-down list provided, and enter any data you may have, including the date of the shot, and the name of the provider who administered it.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transect Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Contact: Wife

Balance Due: \$136.57

Upcoming Appointments
[New Appointment](#)

Immunizations

Immunization: DT 1
Date Administered: 2009-04-17
Immunization Manufacturer: AAA Drugs
Immunization Lot Number: 765
Name and Title of Immunization Administrator: Black, Betty or choose Black, Betty
Date Immunization Information Statements Given: 2009-04-17
Date of VIS Statement (?): 2009-04-17
Notes:

Print Shot Record Save Immunization Clear

Vaccine v Date Manufacturer Lot Number Administered By Education Date Note

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find: r
by: Name ID
SSN DOB

Logout

Done

Click 'Save Immunization'. The newly added immunization now appears in the list at the bottom of the screen.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transect Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Contact: Wife

Balance Due: \$136.57

External ID: 1
Sex: Male
License/ID: 1234567

Upcoming Appointments
New Appointment

Immunizations

Immunization: DT 1
Date Administered: 2009-04-21
Immunization Manufacturer:
Immunization Lot Number:
Name and Title of Immunization Administrator: Black, Betty or choose
Date Immunization Information Statements Given: 2009-04-21
Date of VIS Statement: 2009-04-21
Notes:

Print Shot Record Save Immunization Clear

Vaccine v Date Manufacturer Lot Number Administered By Education Date Note

Vaccine	Date	Manufacturer	Lot Number	Administered By	Education	Date	Note
DT 1	2009-04-17	AAA Drugs	765	Black, Betty		2009-04-17	

Logout Done

Return to the Summary page via the navigation menu on the left. Notice that the lower left portion of the patient summary now shows a brief list of all active issues, immunizations and prescriptions.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Add Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transect Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Employer Occupation: Engineer Leave Message With: wife
Employer Address: 44566 Industry Way Employer Name: NW Company
State: OR City: Portland
Postal Code: 97002

Medical Problems (More)
bronchitis

Allergies (More)
penicillin

Medications (More)
Claritin D

Immunizations (More)
2009-04-21 - DT 1

Prescriptions
Claritin D 1 in tablet q.d.

Notes (More)
Balance Due \$136.57

Active Patient: Rod Roark (1)
Active Encounter: None
Popups
Find:
by: Name ID
 SSN DOB
Logout
Done

Patient Notes & Transactions

Patient notes store patient information that is unrelated to the patient's medical condition. Such information may include outstanding balances, changing insurance information or patient requests for actions by the clinic.

Transactions are somewhat similar, but record events that have already occurred. These may be referrals, requests from either the patient or the doctor, or legal transactions.

Patient Notes

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main window displays a patient schedule for "B Black" on April 21, 2009. The schedule shows various time slots from 8:00 to 11:15, with some entries like "IN" and "LUNCH". On the left, there is a sidebar with a navigation menu and a search bar. The search bar has "roark" entered and includes dropdowns for "Name", "ID", "SSN", and "DOB".

Administrator	B Black	G Green
8:00	8:00 IN 8:30 IN 8:45 9:00 9:15	8:00 IN 8:15 8:30 8:45 9:00 9:15
9:30 IN	9:30	9:30
9:45	9:45	9:45
10:00	10:00	10:00
10:15	10:15	10:15
10:30	10:30	10:30
10:45	10:45	10:45
11:00	11:00	11:00 LUNCH
11:15	11:15	

To begin, log in to OpenEMR, and use the search function in the lower left-hand corner to locate the patient for which you would like to add a note.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: None April 21, 2009

Top Bot

[Help] Showing 1 of 1 records found.

Name	Phone	SS	DOB	ID	PID	[Number Of Encounters]	[Days Since Last Encounter]	[Date of Last Encounter]	[90 Days From Last Encounter]
Roark, Rod	503-456-7890	111-22-3333	08/06/1985	1	1	2	4	04/17/09	Thursday, 07/16/09

Active Patient:
None
Active Encounter:
None
Popups

Find: roark
by: Name ID
SSN DOB

Logout

Done

Click on the desired patient to bring up the 'Summary' page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar
 Password
 Reports
 Ofc Notes
 Fax/Scan
 Addr Blk
 Chart Trk
 Superbill
 Auth/notes
 New Pt
 Patient
 History
 Encounters
 New Enctr
 Immunize
 Documents
 Pt Report
 Pt Notes
 Transact
 Summary
 Encounter
 Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Choices Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife
Employer Occupation: Engineer Employer Name: NW Company

Active Patient: Rod Roark (1)
Active Encounter:
None
Popups

Find: by: Name ID
 SSN DOB

Logout

Done

Notes (More)
(Issues not authorized) Balance Due \$136.57

If the user is not Authorized they will be unable to see the patient's medical details such as issues, immunizations and prescriptions.

Click 'Notes (more)' to add a note for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
User Defined:

Contact Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland

HIPAA Notice Received: YES **Allow Voice Message:** YES
Allow Mail Message: NO **Allow SMS:** NO
Allow Email: YES **Leave Message With:** wife
Employer Occupation: Engineer **Employer Name:** NW Company

Patient Notes (Back)

(Issues not authorized)

Add New Note

Type: Unassigned To: Cyan, Cindy

New employer & insurance e Unassigned
Chart Note
Insurance
New Document
Pharmacy
Prior Auth
Referral
Test Scheduling
Bill/Collect
Other

1-2009.
[Note] [Live] [Only Inactive]

Done

The 'Patient Notes' page will present you with a text box for entering the note, as well as drop-down lists for selecting the type of note, and the person to whom the note is addressed.

Type your note in the text box and click 'Add New Note'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
User Defined:

Contact Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland

HIPAA Notice Received: YES Allow Voice Message: YES

(Issues not authorized)

Patient Notes (Back)

Add New Note

Type: Unassigned To: Cyan, Cindy

[Add New Note]

Change Activity

View: [All] [Only Active] [Only Inactive]

Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Change Activity

Done

The new note now appears in the list of notes on the same screen. The checkbox is used to control whether the note is "active". Above are options to view only the active or inactive notes.

Click 'Patient Notes (back)' to return to the patient summary.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Choices Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife
Employer Occupation: Engineer Employer Name: NW Company

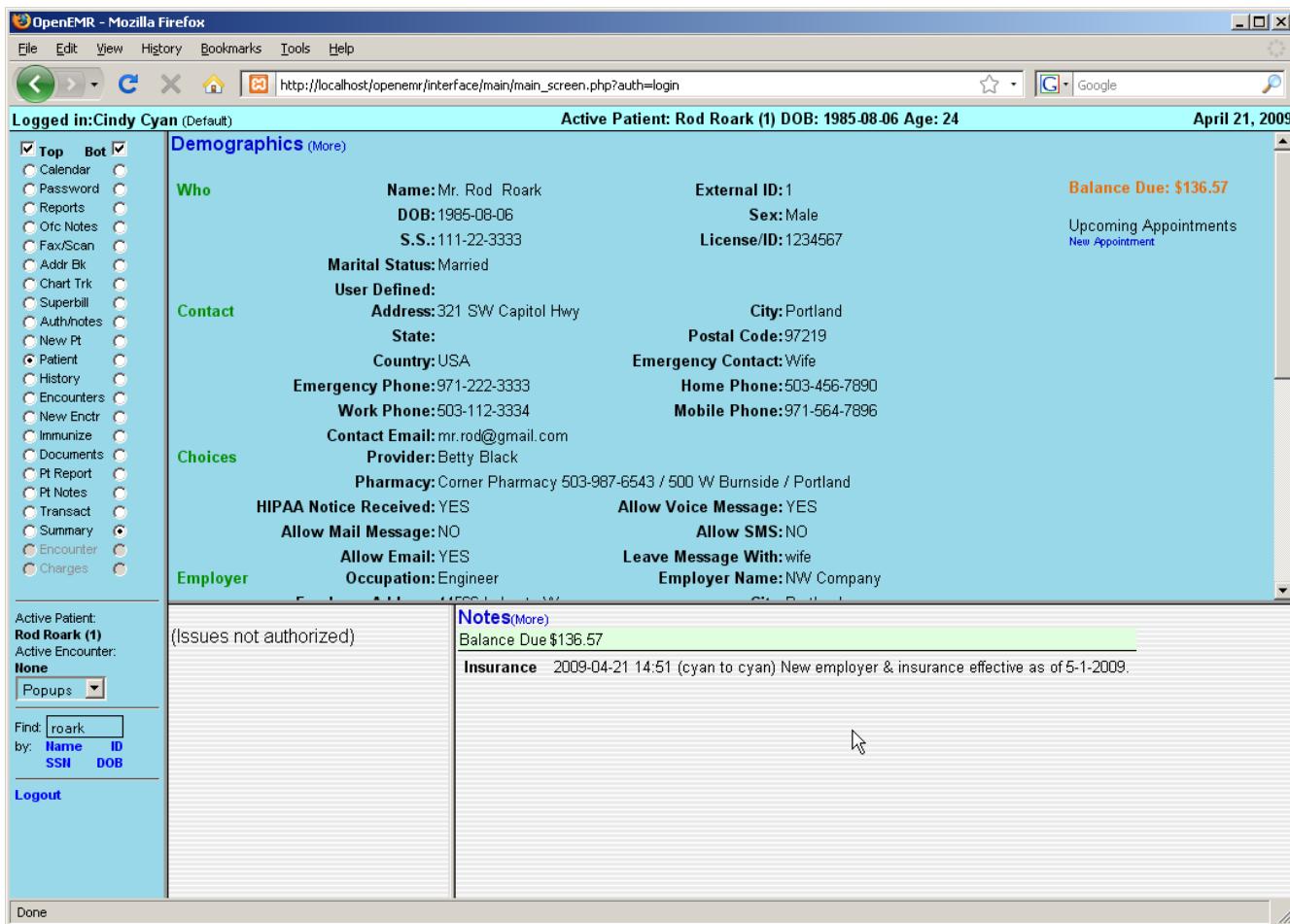
Notes (More)
(Issues not authorized)
Balance Due \$136.57
Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Active Patient: Rod Roark (1)
Active Encounter:
None
Popups

Find: roark
by: Name ID
SSN DOB

Logout

Done



The new note is now listed on the Summary page.

Transactions

Click 'Transact' in the navigation menu to go to the Transactions page. (located under 'Patient/Client – Visits' in Tree View)

The Transactions page contains two basic form types. A simple form for internal transactions such as patient requests or billing transactions, and a Referral form.

Referrals

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

http://localhost/openemr/interface/main/main_screen.php?auth=login

Top Bot

Calendar Password Reports Orc Notes Fax/Scan Addr Blk Chart Trk Superbill Authnotes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State:
Country: USA
Emergency Phone: 971-222-3333
Work Phone: 503-112-3334
Contact Email: mr.rod@gmail.com
Provider: Betty Black

External ID: 1
Sex: Male
License/ID: 1234567
Balance Due: \$136.57
Upcoming Appointments [New Appointment](#)

Choices

Transaction Type: Referral Referral Patient Request Physician Request Legal Billing

Referral Date: **Refer To:** **Refer By:** **Reason:**

External Referral: **Risk Level:** **Requested Service:** **Referrer Diagnosis:** **Include Vitals:**

Counter-Referral [\[Save Transaction\]](#)

Find: roark by: Name ID SSN DOB

Logout Done

Select 'Referral' from the drop-down list to begin a new Referral transaction.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black

Choices

Transaction Type: Referral

Referral

Referral Date:	2009-04-21 <input type="button" value="..."/>	Refer By:	Betty Black
Refer To:	Orange, Ophelia	Reason:	See Dr. Orange for lesion on scalp.
External Referral:	Yes	Referrer Diagnosis:	
Risk Level:	Low	Include Vitals:	No
Requested Service:			

Counter-Referral

[Save Transaction]

Done

Another drop-down contains a list of physicians and clinics from the Address Book to which you can refer your patient. Select the referring physician, risk level, etc., and enter a reason for the referral.

Click 'Save Transaction'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black

Patient Transactions (Add Transaction) (Print Blank Referral Form)

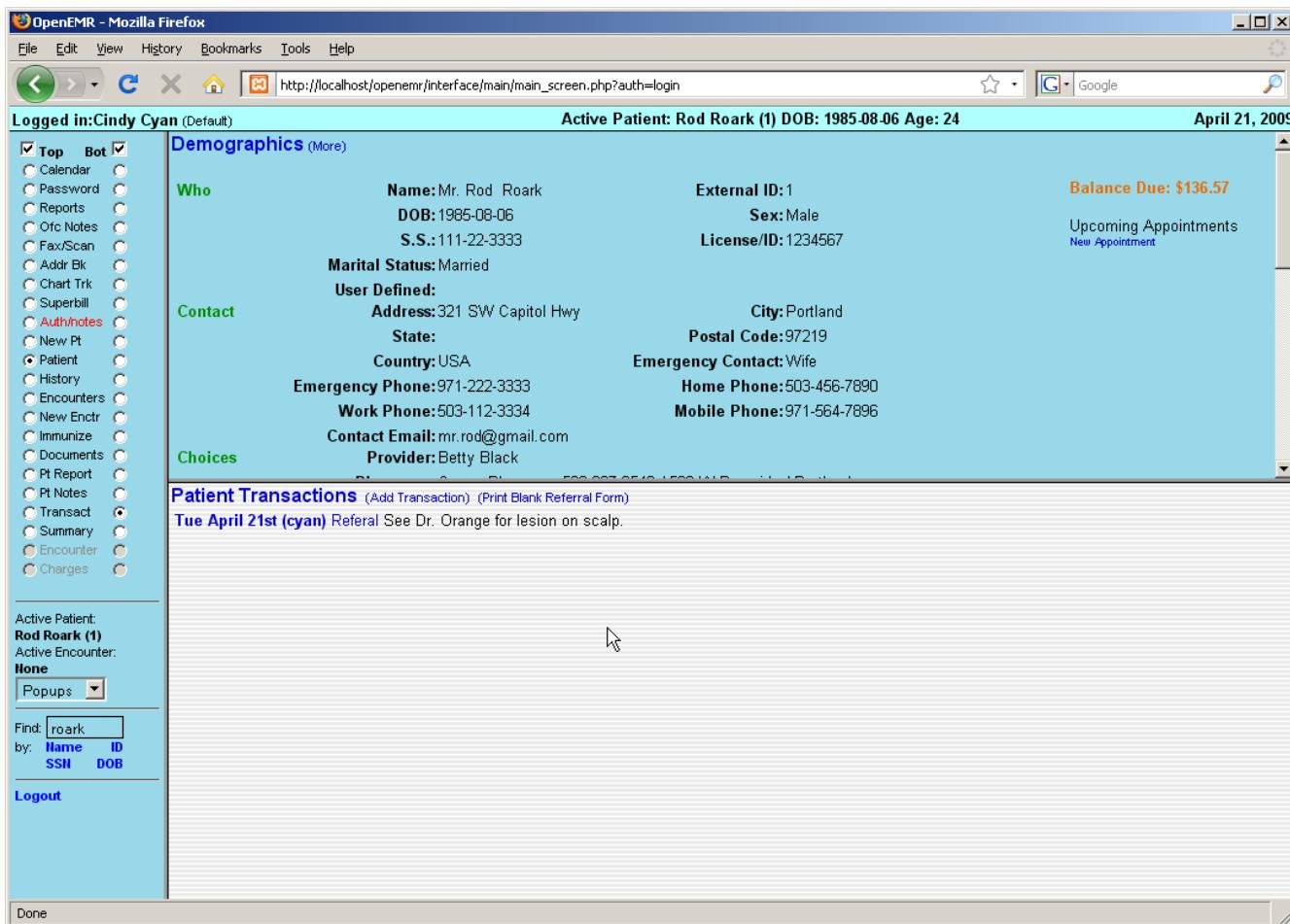
Tue April 21st (cyan) Referral See Dr. Orange for lesion on scalp.

Active Patient: Rod Roark (1)
Active Encounter:
None
Popups

Find: roark
by: Name ID
SSN DOB

Logout

Done



The referral is now in the Patient Transactions list.

Click 'Referral' next to the transaction to generate a printable version of the Referral form.

Referral Form - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/patient_file/transaction/print_referral.php?transid=1

OpenEMR Referral Form

Your Clinic Name Here

Clinic ID	
Client ID	1
Control No.	1
Date	2009-04-21

REFERRAL FORM

Name Mr. Rod Roark Age 23 Gender Male

Address 321 SW Capitol Hwy, Portland Postal 97219 Phone 503-456-7890

Reference Reason See Dr. Orange for lesion on scalp.

Diagnosis _____

Reference classification (risk level) Low

Doctor's name and signature Betty Black

Referred to Orange, Ophelia / Universal Health Center

Your Clinic Name Here

Clinic ID	
Client ID	1
Control No.	1
Date	2009-04-21

Name Mrs. Marie M Maroon Age 23 Gender Male

Health centre/clinic Universal Health Center

Address 4456 SE Washington St, Portland OR Postal 97215 Phone _____

Reference Reason See Dr. Orange for lesion on scalp.

Client medical history summary:

Blood pressure / _____ Height _____ Weight _____

Referer name and signature Betty Black

Specialist name and signature Orange, Ophelia

Done

Depending on your system's configuration, you may be asked to save the file, or it may be printed automatically.

When you are finished return to the Transaction list and click 'Add Transaction'.

Basic Transactions

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addl Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More) (Delete)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
HIPAA Notice Received: YES **Allow Voice Message:** YES

Transaction Type: Physician Request

Details:
request pre-authorization for air filtration system
in patient home.

[Save Transaction]

Active Patient:
Rod Roark (1)
Active Encounter:
None
[Popups]

Find: roark
by: **Name** **ID**
SSH DOB

[Logout](#)

Done

Other transaction types use the simple transaction form. Select the desired type from the list and enter the transaction details in the text box provided. Click 'Save Transaction' when finished.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics (More)

Who Name: Mr. Rod Roark
DOB: 1985-08-06
S.S.: 111-22-3333
Marital Status: Married
Contact User Defined:
Address: 321 SW Capitol Hwy
State: City: Portland
Country: USA Postal Code: 97219
Emergency Phone: 971-222-3333 Emergency Contact: Wife
Work Phone: 503-112-3334 Home Phone: 503-456-7890
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896
Provider: Betty Black
Choices Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife
Employer Occupation: Engineer Employer Name: NW Company

Patient Transactions (Add Transaction) (Print Blank Referral Form)
Tue April 21st (cyan) Physician Request request pre-authorization for air filtration system in patient home.
Tue April 21st (cyan) Referral See Dr. Green for lesion on scalp.

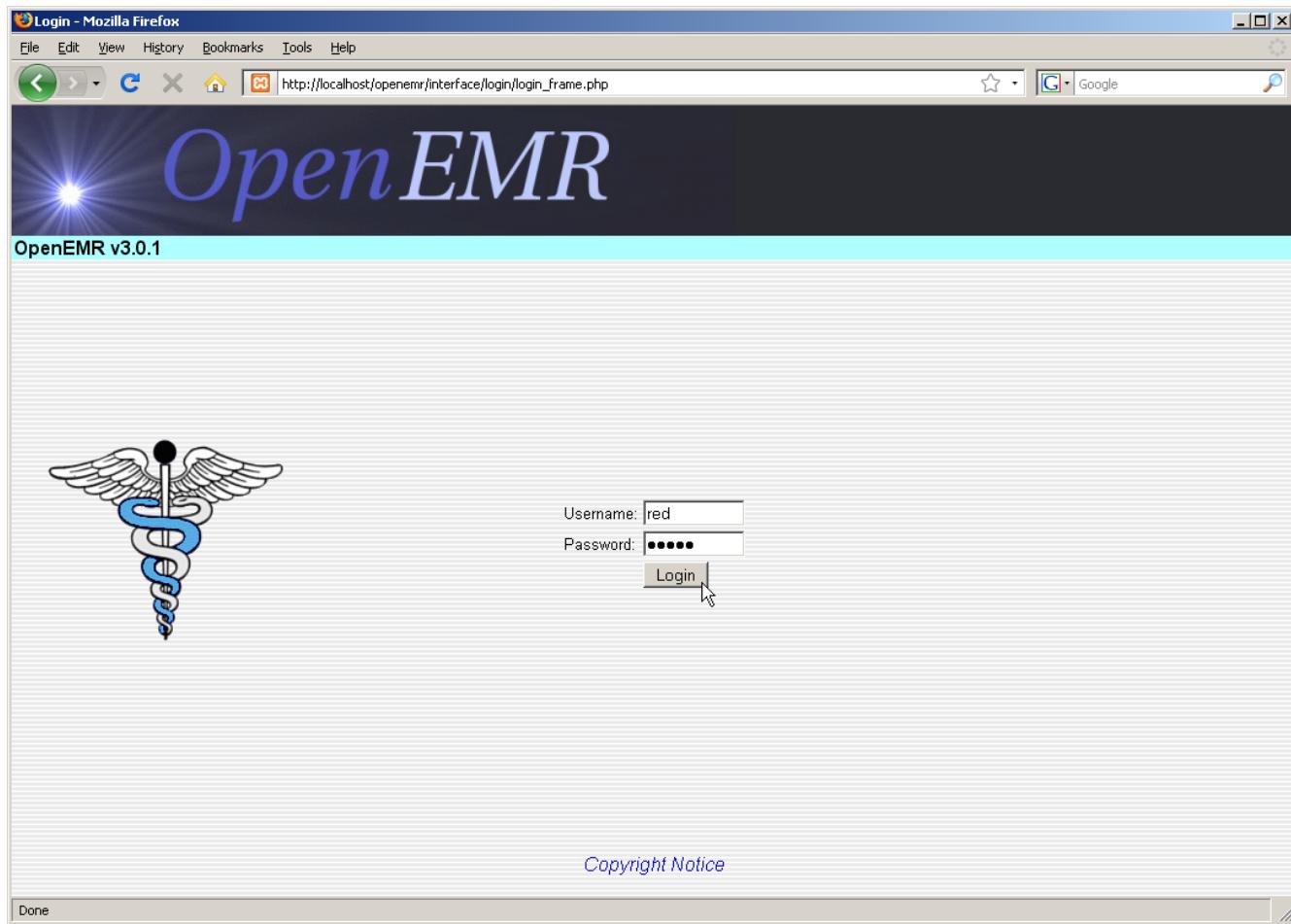
Find: roark
by: Name ID SSN DOB

Logout Done

The new transaction has now been added to the list along with the referral. Click on the date of a transaction to edit its contents.

Basic Billing

Only the Administrator, authorized users, and those with Access Control designated as 'Accounting' in their user profile can access OpenEMR's Billing system.



To begin, log in with your designated username and password.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Do you want Firefox to remember this password?

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

All Users 2009-04-21 Day View Go Today Add Search

Administrator Betty Black All Facilities << Tuesday, April 21, 2009 >>

	Administrator	B Black	G Green
8:00		8:00	8:00 IN
			8:15
		8:30 IN	8:30
		8:45	8:45
		9:00	9:00
		9:15	9:15
9:30	IN	9:30	9:30
9:45		9:45	9:45
10:00		10:00	10:00
10:15		10:15	10:15
10:30		10:30	10:30
10:45		10:45	10:45
11:00		11:00	11:00 LUNCH

Patient Notes (See All)

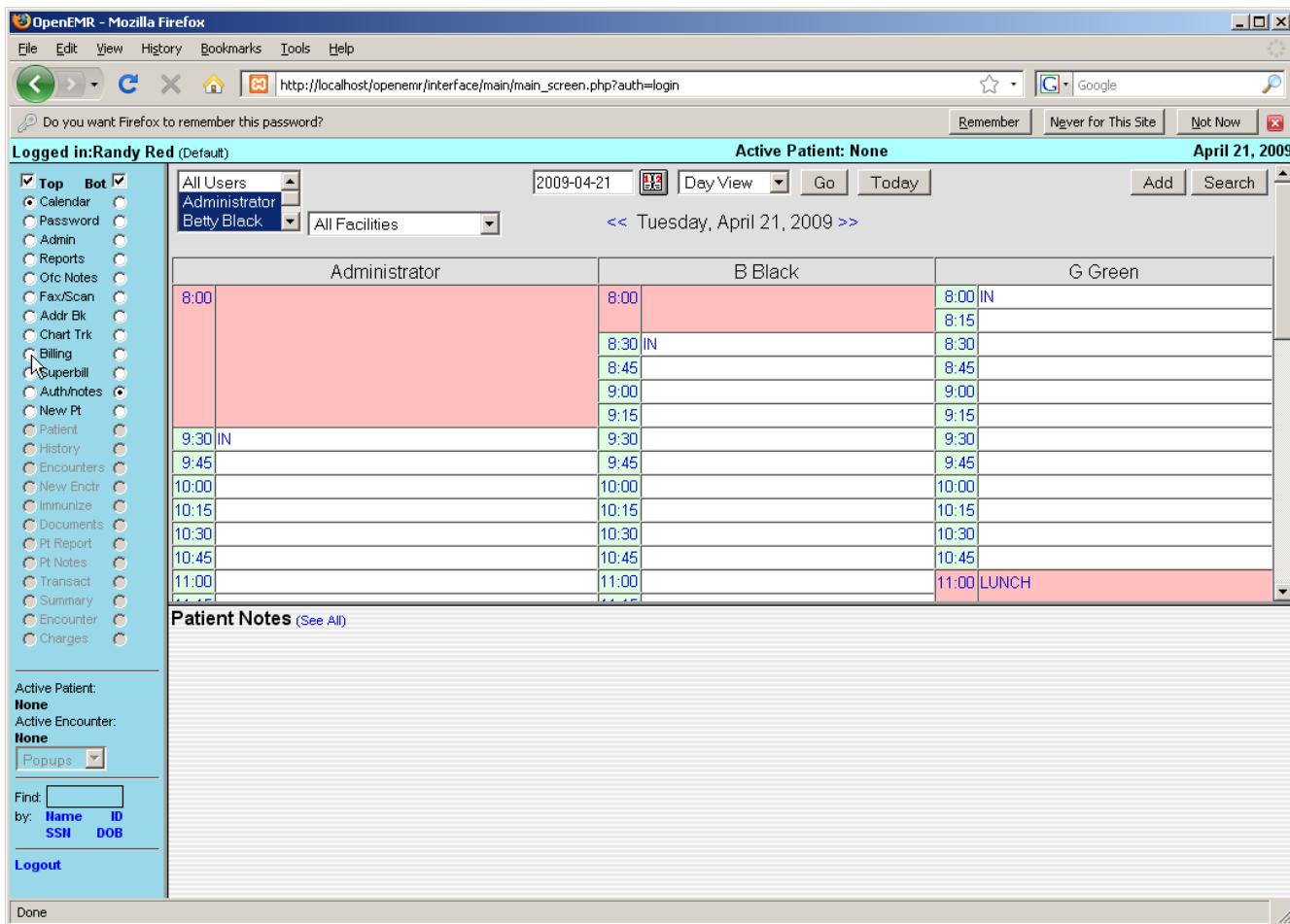
Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSN DOB

Logout Done



Select 'Billing' from the navigation menu on the left (under 'Fees' in Tree View). This brings you to the main Billing screen. This will present you with options to generate a variety of printable and electronic claims and reports.

Billing Reports

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main content area is titled "Billing Report". On the left, there is a sidebar with various menu items like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing (which is selected), Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Below this is a section for Active Patient and Active Encounter, both set to "None". There is also a "Popups" dropdown and a search bar for "Find" with options "Name", "ID", "SSN", and "DOB". At the bottom of the sidebar is a "Logout" link. The main right-hand panel has sections for "Patient Notes" and "See All". At the top of the main panel, there are fields for "From" (2009-04-21) and "To" (empty), checkboxes for "Show Unbilled Only" (checked) and "Show Authorized Only" (unchecked), and buttons for "[Change View] or [Export OFX]", "[View Printable Report]", "[Reports]", "[EOBs]", "[View Log]", "[Select All]", "Generate X12", "Generate HCFA", "Mark as Cleared", and "Re-Open". It also shows "HCFA Margins: Left: 24 Top: 27". The status bar at the bottom says "Done".

The Billing Report page will automatically display any billable encounters that were generated today. To view billables from a different time period enter the 'From' and 'To' dates using the date selection tool, and click 'Change View' in the top right corner of the screen.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Blk Chart Trk
 Billing Superbill
 Auth/Notes New Pt
 Patient History Encounters
 New Enctr Immunize
 Documents PT Report
 PT Notes Transact
 Summary Encounter
 Charges

Billing Report

From: 2009-04-13 To: Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]
[View Printable Report] [Reports] [EOBs]

April, 2009

Generate X12 Generate HTML HCFA Margins: Left: 24 Top: 27

Today

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

Fri, Apr 17

Patient Notes ([See All](#))

Active Patient: **None**
Active Encounter: **None**
Popups
Find:
by: Name ID
 SSN DOB

[Logout](#)

Done

The list should now display all billables from the selected date range.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Bk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]
[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17
Bill: primary: Pacific Health ICD9: 477.8 Betty Black 2009-04-17
2009-04-17 17:38 Encounter was coded

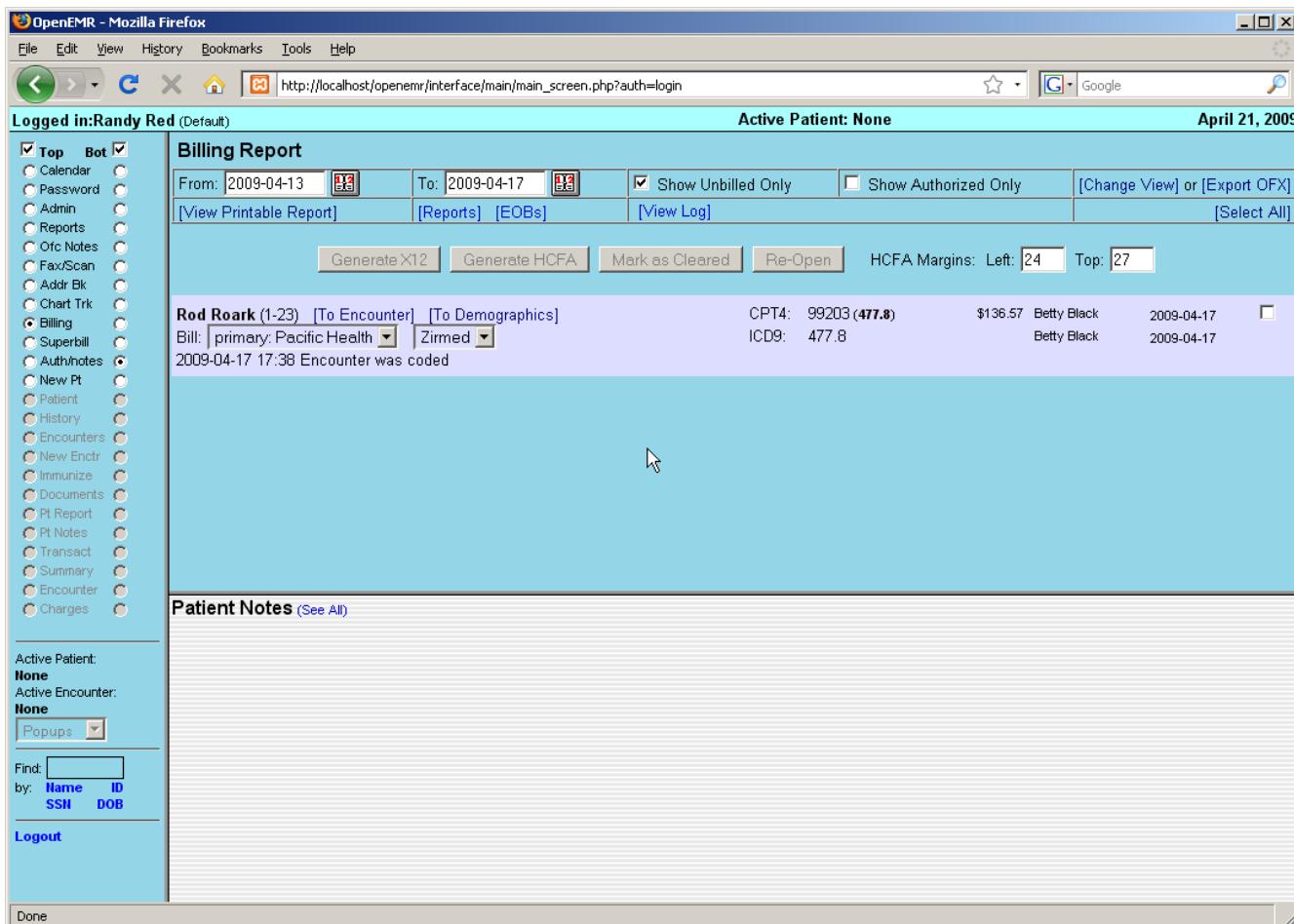
Patient Notes [\(See All\)](#)

Active Patient: **None**
Active Encounter: **None**
 Popups

Find:
by: Name ID
 SSN DOB

[Logout](#)

Done



Generating Claims

Clicking the checkbox to the right of the desired encounter will enable a set of buttons for generating claims. Your system should be configured with the appropriate set of forms for the insurance companies and clearinghouses used by your clinic.

Click 'Generate X12' to create a claim file that is suitable for sending to the clearinghouse.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [View Printable Report] [Reports] [EOBs] [View Log] [Select All]

HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17
Bill: primary: Pacific Health ICD9: 477.8 Betty Black 2009-04-17
2009-04-17 17:38 Encounter was coded

Patient Notes ([See All](#))

Active Patient: **None**
Active Encounter: **None**
 Popups

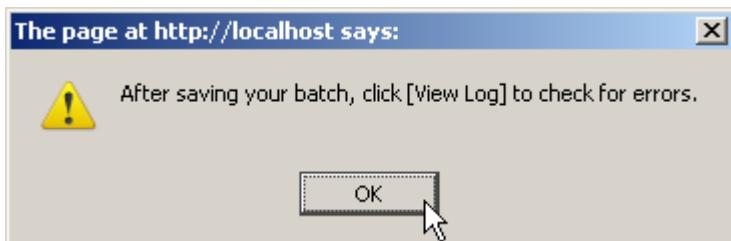
Find: by: Name ID SSN DOB

[Logout](#)

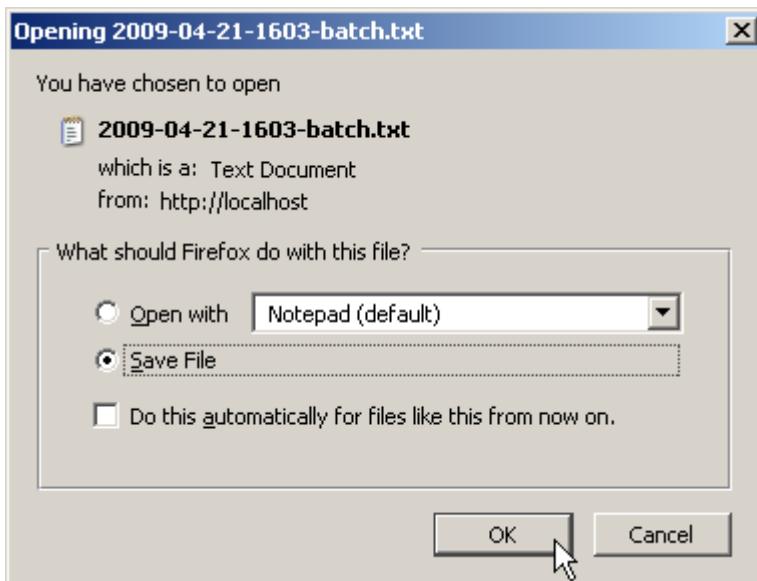
Done

OpenEMR will present you with a confirmation popup, reminding you to check the log file after you have finished generating your claims.

Click 'OK' to proceed.



The standard Save File dialog should appear, allowing you to save the generated batch file to your computer.



Once the file has been saved, click 'View Log' to check whether the claims were generated successfully.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in:Randy Red (Default)

Active Patient: None April 21, 2009

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]

[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

[Generate X12] Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [To Encounter] [To Demographics]
Bill: primary: Pacific Health Zirmed CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17
ICD9: 477.8 Betty Black 2009-04-17
2009-04-17 17:38 Encounter was coded

Patient Notes (See All)

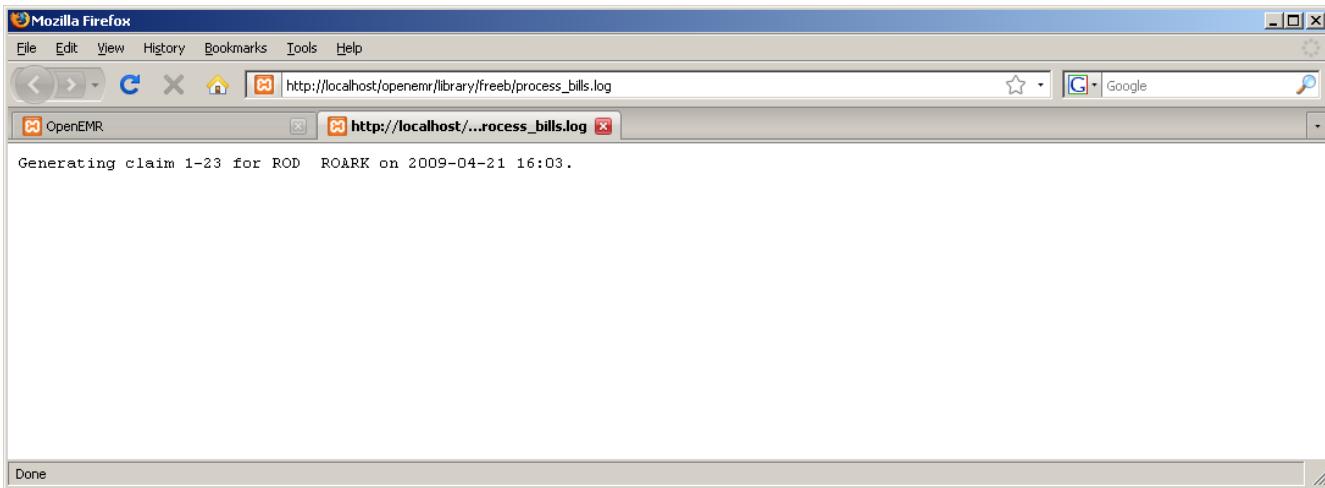
Active Patient:
None
Active Encounter:
None
Popups

Find: by: Name ID
SSN DOB

Logout

http://localhost/openemr/library/freeb/process_bills.log

If there were any errors in the claim generation process, they will be displayed here. Otherwise you will see a note indicating that the file was generated successfully.



The downloaded claim file should contain the necessary encounter information, formatted for billing. This is what will be sent to the clearinghouse, by whatever method has been specified.

```
ISA*00*          *00*          *ZZ*34567          *ZZ*23456
*090421*1603*U*00401*020672584*0*P*:~GS*HC*34567*23456*20090421*1603*1*X*004010X098A1~ST*837*0001~BHT*0019*00*012
3*20090421*1023*CH~REF*87*004010X098A1~NM1*41*2*YOUR CLINIC NAME HERE*****46*11222222~PER*IC*CINDY
CYAN*TE*5031234567~NM1*40*2*ZIRMED*****46*12345~HL*1**20*1~NM1*85*2*YOUR CLINIC NAME
HERE*****24*11222222~N3*1234 SW MAIN ST~N4*PORTLAND*OR*97205~NM1*87*2*YOUR CLINIC NAME
HERE*****24*11222222~N3*1234 SW MAIN ST~N4*PORTLAND*OR*97205~HL*2*1*22*0~SBR*P*18*1234*NW
COMPANY*****CI~NM1*IL*1*ROARK*ROD*****MI*1122334~N3*321 SW CAPITOL
HWY~N4*PORTLAND*OR*97219~DMG*D8*20090414*M~NM1*PR*2*PACIFIC HEALTH*****PI*98765~N3*2001 E 123RD
ST~N4*PASADENA*CA*90059~CLM*1-
23*136.57***11:1*Y*AY*Y*Y*C~DTP*431*D8*20090417~REF*X4*12345678~HI*BK:4778~NM1*DN*1*BLACK*BETTY****34*111223333~P
RV*RF*ZZ*207Q00000X~REF*1G*U11111~NM1*82*1*BLACK*BETTY****34*111223333~PRV*PE*ZZ*207Q00000X~NM1*77*2*YOUR CLINIC
NAME HERE*****24*11222222~N3*1234 SW MAIN
ST~N4*PORTLAND*OR*97205~LX*1~SV1*HC:99203*136.57*UN*1***1~DTP*472*D8*20090417~SE*38*0001~GE*1*1~IEA*1*020672584~
```

Uncheck 'Show Unbilled Only' and click 'Change View' to refresh the billing list and see the updated status of the encounter.

Click 'Mark as Cleared' to indicate that billing has been completed for this encounter.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]
[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [To Encounter] [To Demographics] CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17
Bill: primary: Pacific Health Zirmed ICD9: 477.8 Betty Black 2009-04-17
2009-04-17 17:38 Encounter was coded
2009-04-21 16:03 Queued for primary standard billing to Pacific Health
2009-04-21 16:03 Claim was generated to file 2009-04-21-1603-batch.txt

Patient Notes (See All)

Active Patient: None
Active Encounter: None
Popups Find: by: Name ID SSN DOB

Logout Done

The screenshot shows the OpenEMR interface for a user named 'Randy Red'. The main window displays a 'Billing Report' for the period from April 13 to April 17, 2009. A specific claim for 'Rod Roark' is highlighted. The claim details are as follows:

- CPT4: 99203 (477.8)
- ICD9: 477.8
- Total: \$136.57
- Billed to: Betty Black
- Date: 2009-04-17

The encounter was coded on April 17, 2009, at 17:38. The claim was queued for primary standard billing to 'Pacific Health' on April 21, 2009, at 16:03. It was also noted that the claim was generated to file '2009-04-21-1603-batch.txt' on April 21, 2009, at 16:03.

You will then be presented with a screen indicating that the claim has been “marked as billed only.”

Click 'Back' to return to the Billing Report page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents PT Report PT Notes Transact Summary Encounter Charges

Billing queue results:

back

Claim 1-23 was marked as billed only.

Patient Notes ([See All](#))

Active Patient:
None

Active Encounter:
None

[Popups](#)

Find:
by: [Name](#) [ID](#) [SSN](#) [DOB](#)

[Logout](#)

Done

Generating HCFA Forms

In OpenEMR multiple forms may be generated for each claim.

For example, re-enter the desired date range, uncheck 'Show Unbilled Only' and click 'Change View' again to show the current status of the claim. You can see that the claim has been "Marked as cleared."

Check the box to the right of the encounter and click 'Generate HCFA'.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Bk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Immunize Documents
 Pt Report Pt Notes
 Transact Summary
 Encounter Charges

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]
[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

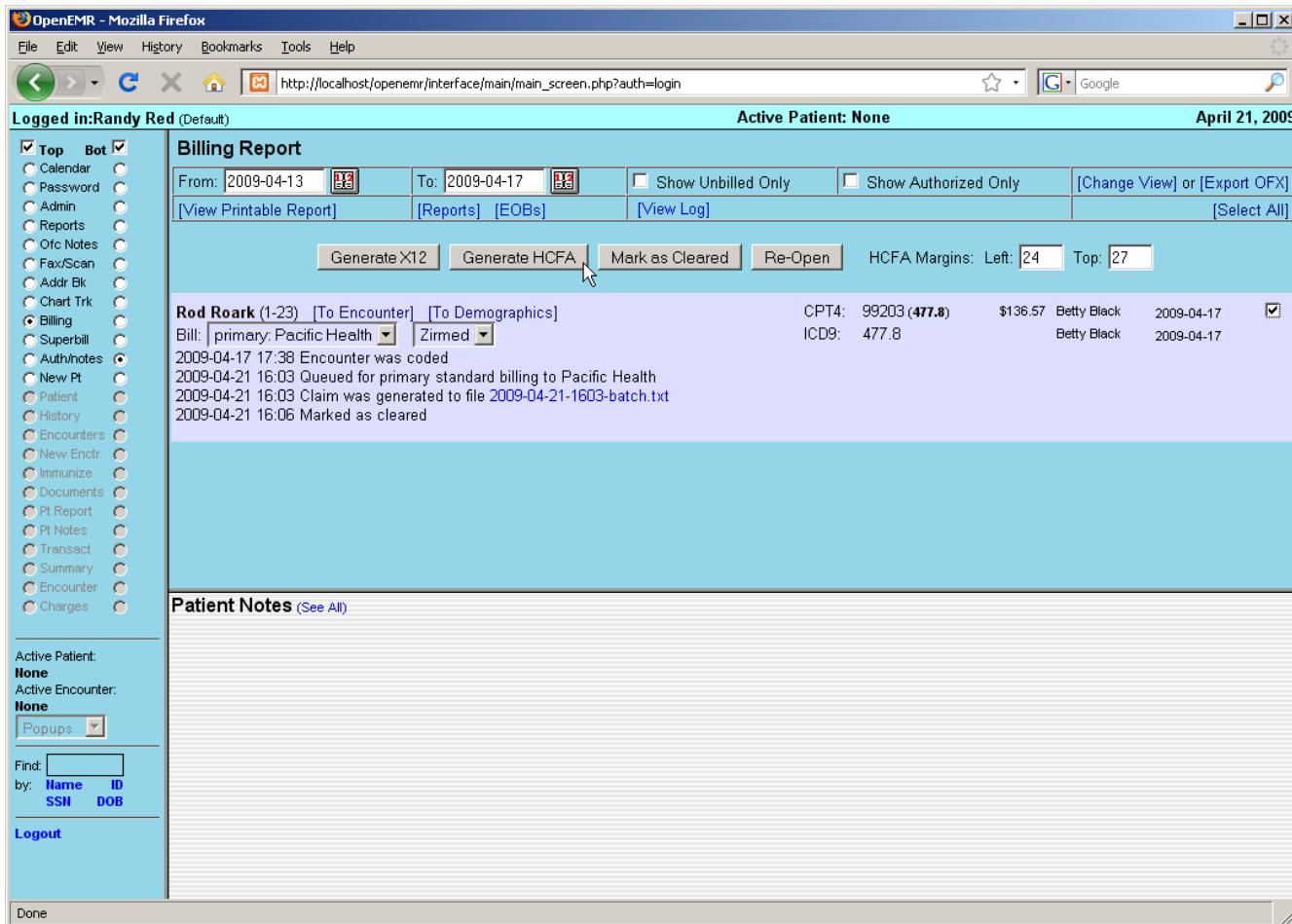
Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (**477.8**) \$136.57 Betty Black 2009-04-17
Bill: primary: Pacific Health ICD9: 477.8 Betty Black 2009-04-17
2009-04-17 17:38 Encounter was coded
2009-04-21 16:03 Queued for primary standard billing to Pacific Health
2009-04-21 16:03 Claim was generated to file [2009-04-21-1603-batch.txt](#)
2009-04-21 16:06 Marked as cleared

Patient Notes [\(See All\)](#)

Active Patient: **None**
Active Encounter: **None**
Popups
Find: by: Name ID
 SSN DOB

[Logout](#)

Done



OpenEMR will now generate a PDF of the HCFA claim, based on the standard HCFA form template. The new form can be viewed using a built-in PDF viewer, or printed automatically on a pre-printed HCFA 1500 form, depending on your system's configuration.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient:
None

Active Encounter:
None

Find:
by: Name ID
 SSN DOB

[Logout](#)

PACIFIC HEALTH
2001 E 123RD ST
PASADENA, CA 90059

X 1122334
ROARK, ROD 08 06 1985 X ROARK, ROD
321 SW CAPITOL HWY X 321 SW CAPITOL HWY
PORTLAND X PORTLAND OR
97219 503 4567890 X 97219 503 4567890
1234
X 04 14 2009 X
X NW COMPANY
X PH 70 X

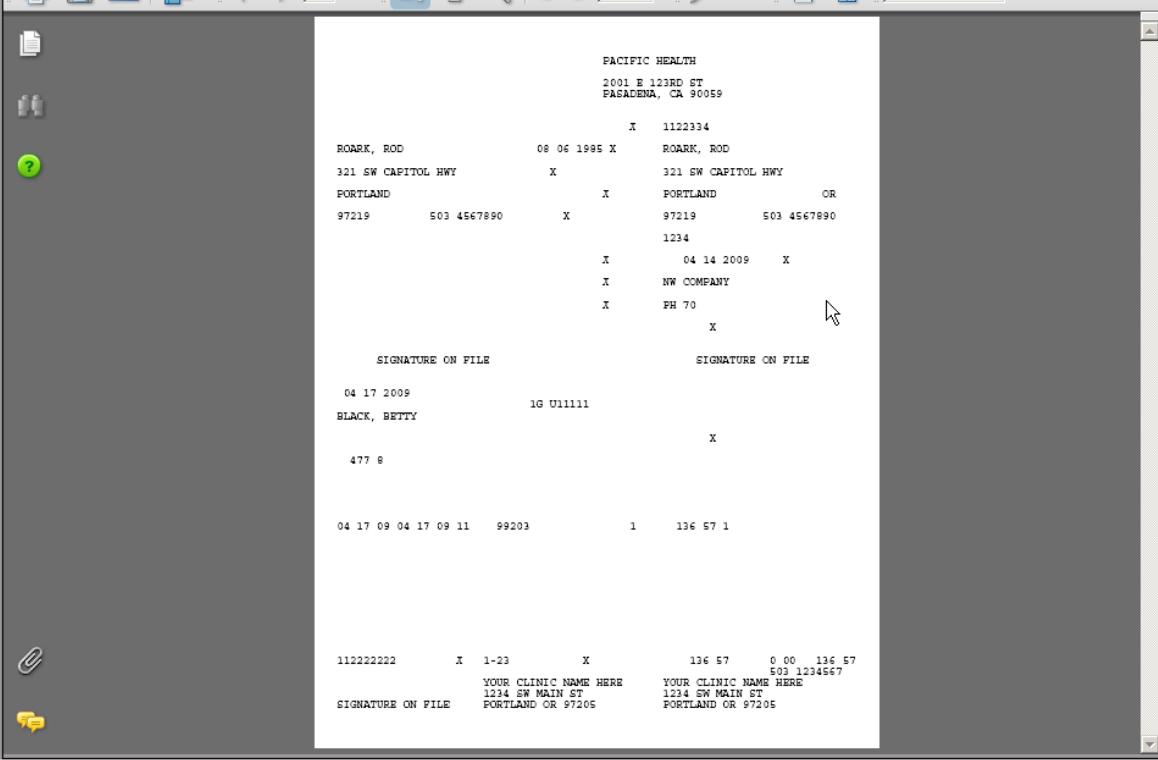
SIGNATURE ON FILE SIGNATURE ON FILE

04 17 2009 1G U11111
BLACK, BETTY X
477 8

04 17 09 04 17 09 11 99203 1 136 57 1

112222222 X 1-23 X 136 57 0 00 136 57
YOUR CLINIC NAME HERE 503 1234567
1234 SW MAIN ST
PORTLAND OR 97205
SIGNATURE ON FILE YOUR CLINIC NAME HERE
1234 SW MAIN ST
PORTLAND OR 97205

Done



Returning to the Billing Report, you can see that the status of the billable encounter has been updated.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Bk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Immunize Documents
 Pt Report Pt Notes
 Transact Summary
 Encounter Charges

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]
[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (**477.8**) \$136.57 Betty Black 2009-04-17
Bill: primary: Pacific Health Zirmed ICD9: 477.8 Betty Black 2009-04-17

2009-04-17 17:38 Encounter was coded
2009-04-21 16:03 Queued for primary standard billing to Pacific Health
2009-04-21 16:03 Claim was generated to file 2009-04-21-1603-batch.txt
2009-04-21 16:06 Marked as cleared
2009-04-21 16:09 Queued for primary hcfa billing to Pacific Health
2009-04-21 16:09 Claim was generated to file 2009-04-21-1609-batch.pdf

Active Patient:
None
Active Encounter:
None
[Popups]
Find:
by: Name ID
 SSH DOB

[Logout](#)

Done

Accounting & Receivables

Users classified as Accounting or Administrator are also authorized to enter receivables for the clinic. Checks received from insurance companies can be entered here and distributed to cover the appropriate encounters. Patients can also be billed, and their payments recorded.

Explanation of Benefits

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main menu includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL "http://localhost/openemr/interface/main/main_screen.php?auth=login". The top right corner displays "Active Patient: None" and the date "April 21, 2009". On the left, a navigation menu lists various modules like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Add Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. A "Billing Report" section is highlighted. It contains fields for "From" (2009-04-21) and "To" (empty), checkboxes for "Show Unbilled Only" and "Show Authorized Only", and buttons for "[View Printable Report]", "[Reports]", "[EOBs]", "[View Log]", "Generate X12", "Generate HCFA", "Mark as Cleared", and "Re-Open". To the right, it says "HCFA Margins: Left: 24 Top: 27". Below the main area, there are sections for "Active Patient: None", "Active Encounter: None", and a "Find" field with options for Name, ID, SSN, and DOB. At the bottom, there are "Logout" and "Done" buttons.

To begin, select 'Billing' from the navigation menu and click 'EOBs' to bring up the Explanation of Benefits Search window. This is where you can upload an ERA file (click 'Help' in the upper right-hand corner for more information) or begin inputting payments manually.

At the top you may enter a source (Eg. check number), pay date and check amount. The amount field will be automatically decremented as payments are entered into the associated invoices. When all invoices have been completed this value should be zero.

The screenshot shows the 'EOB Posting - Search' window. At the top, there are search fields for Payer (Pacific Health), Source (12345), Pay Date (2009-04-21), Deposit Date (empty), Amount (\$85.00), and a 'Help' link. Below these are fields for Name, Chart ID, Encounter, Svc Date (2009-04-17), To, and an 'Open' dropdown. A purple bar contains a 'Browse...' button for uploading ERA files. Below the search area are buttons for 'Select All', 'Clear All', 'Print Selected Statements', and a checkbox for 'Without Update'. The status bar at the bottom left says 'Done'.

The search fields, with the blue background, are for locating a specific invoice (or invoices). Enter the appropriate parameters, such as the date of service, and click 'Search' to bring up a list of all invoices (claims) matching the requested parameters.

The screenshot shows the same 'EOB Posting - Search' window after a search has been performed. A table lists invoices. The first row, for patient 'Roark, Rod' with invoice '1.23', is highlighted with a blue background. The table columns are Patient, Invoice, Svc Date, Last Stmt, Charge, Adjust, Paid, Balance, Prv, and Sel. The 'Prv' column for the selected row contains '-2'. Below the table are buttons for 'Select All', 'Clear All', 'Print Selected Statements', and a checkbox for 'Without Update'. The status bar at the bottom left says 'Done'.

Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Paid	Balance	Prv	Sel
Roark, Rod	1.23	2009-04-17		136.57			136.57	-2	<input type="checkbox"/>

The list shows the patient and invoice number, as well as the current balance to be paid. The number with a '-' in the 'Prv' column indicates the number of insurance companies for which this invoice is awaiting payment.

Entering Payments

Clicking the invoice number you wish to work with opens the EOB Invoice window. Notice that the source and pay date from the previous window have been copied over; this saves time in the common case where a single check from the insurance company pays for multiple claims.

EOB Posting - Invoice - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl_eob_invoice.php?id=5

OpenEMR **EOB Posting - Search** **EOB Posting - Invoice**

Patient: Rod Roark
 Provider: Betty Black Ins1: Pacific Health
 Ins2: MedOne
 Invoice: 1.23
 Svc Date: 2009-04-17 Done with: None Ins1 Ins2
 Check/EOB No.: 12345
 Bill Date: 2009-04-17 Now posting for: Ins1 Ins2 Ins3 Patient
 Check/EOB Date: 2009-04-21
 Needs secondary billing **Save** **Cancel** Deposit Date:

Code	Charge	Balance	By/Source	Date	Pay	Adjust	Reason
99203	136.57	136.57			85.00		W

Done

The EOB Invoice page contains a detailed list of payments made on this invoice so far. Enter the payment amount next to the remaining balance, and check 'Needs secondary billing'. This will allow the claim to be rebilled to the secondary insurance. Select 'Done with Ins1' above to indicate that the primary insurance EOB has been posted. When you are finished, click 'Save'.

EOB Posting - Search - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl_eob_search.php

OpenEMR **EOB Posting - Search**

Payer: MedOne Source: 22334 Pay Date: 2009-04-21 Deposit Date: Amount: 20.00 Help
 Name: Chart ID: Encounter: Svc Date: 2009-04-17 To: Open **Search**
 Or upload ERA file: **Browse...**

Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Paid	Balance	Prv	Sel
Roark, Rod	1.23	2009-04-17		136.57	0.00	85.00	51.57	-1	<input type="checkbox"/>

Select All Clear All Print Selected Statements Without Update

Done

Once payment has been billed and received from secondary insurance, it can be entered in the same way. Enter the source and pay date, etc. and locate the appropriate invoice(s) using the search function.

Payment amounts are now shown along with the remaining balance. The number in the 'Prv' column has also decreased. Select the invoice number to bring up the EOB Invoice window again.

EOB Posting - Invoice - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl_eob_invoice.php?id=5

OpenEMR EOB Posting - Search EOB Posting - Invoice

Patient: Rod Roark
Provider: Betty Black Ins1: Pacific Health
Ins2: MedOne
Invoice: 1.23
Svc Date: 2009-04-17 Done with: None Ins1 Ins2 Check/EOB No.: 22334
Bill Date: 2009-04-17 Now posting for: Ins1 Ins2 Ins3 Patient Check/EOB Date: 2009-04-21
 Needs secondary billing Deposit Date:

Code	Charge	Balance	By/Source	Date	Pay	Adjust	Reason
99203	136.57	51.57	Ins1/12345	2009-04-21	85.00	20	16.57 W

Done

A dropdown menu is open over the 'W' button in the table row, listing various adjustment reasons:

- Ins adjust
- Coll w/o
- Pt released
- Sm debt w/o
- To ded'ble
- To copy
- Bad check
- Bad debt
- Discount
- Hardship w/o
- Ins refund
- Pt refund
- Ins overpaid
- Pt overpaid
- Adm adjust
- Untimely filing
- Ins bundling
- After hrs calls

Enter the payment amount and select 'Ins2' to indicate that the secondary insurance EOB has been posted.

Invoice adjustments may also be made here. Enter the adjustment amount (or click 'W' to waive the entire remaining balance), and select a reason for the adjustment from the drop-down list provided. Click 'Save' when finished.

Patient Invoices and Payments

Once payments from the insurance companies have been received and entered, you can use OpenEMR's EOB page to generate invoices for billing patients the remaining amounts.

EOB Posting - Search - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl_eob_search.php

OpenEMR **EOB Posting - Search**

Payer:	-Patient-	Source:	Pay Date:	Deposit Date:	Amount:	Help			
Name:		Chart ID:		Encounter:		Svc Date:	To:	<input type="button" value="Open"/>	<input type="button" value="Search"/>
Or upload ERA file:				<input type="button" value="Browse..."/>		<input type="button" value="Open"/> <input type="button" value="Open All"/> <input type="button" value="All"/> <input type="button" value="Due Pt"/> Due Ins <input type="button" value="Due Ins"/>			
<input type="button" value="Select All"/> <input type="button" value="Clear All"/> <input type="button" value="Print Selected Statements"/> <input type="checkbox" value="Without Update"/>									

Done

Select 'Due Pt' from the drop-down list and click 'Search' to display a list of all invoices that are awaiting payment from patients. Invoices still awaiting payments from insurance companies will not be shown.

EOB Posting - Search - Mozilla Firefox

File Edit View History Bookmarks Tools Help

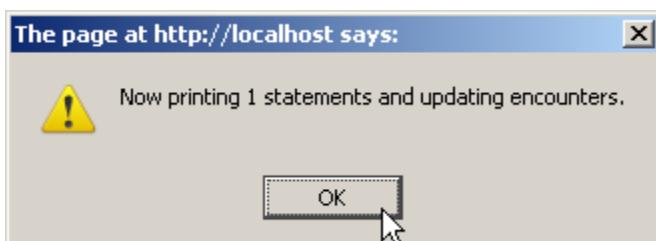
http://localhost/openemr/interface/billing/sl_eob_search.php

OpenEMR **EOB Posting - Search**

Payer:	-Patient-	Source:	Pay Date:	Deposit Date:	Amount:	Help			
Name:		Chart ID:		Encounter:		Svc Date:	To:	<input type="button" value="Due Pt"/>	<input type="button" value="Search"/>
Or upload ERA file:				<input type="button" value="Browse..."/>					
Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Paid	Balance	Prv	Sel
Roark, Rod	1.23	2009-04-17		136.57	16.57	105.00	15.00		<input checked="" type="checkbox"/>
<input type="button" value="Select All"/> <input type="button" value="Clear All"/> <input type="button" value="Print Selected Statements"/> <input type="checkbox" value="Without Update"/>									

Done

Check the box next to the desired invoice and click 'Print Selected Statements' to generate an invoice for that patient using a customizable template. Depending on your clinic's OpenEMR configuration, the invoice may be printed automatically.



A '1' in the 'Prv' column now indicates that the patient has been billed once for this claim. This number will increment every time a new invoice is printed for this encounter. This is useful when printing so that second

and later notices may be worded differently from the initial statement.

You can also click on the patient's name in the invoice list to create a billing note for that patient. Enter your note into the text field and click 'Save'.

Billing Note for Rod Roark

First invoice has been sent.

Save Cancel

Done

Once payment has been received, it can be entered into the invoice in the same manner as the insurance payments. In the 'Now posting for' list be sure to select 'Patient'. Enter the payment amount as before and click 'Save'.

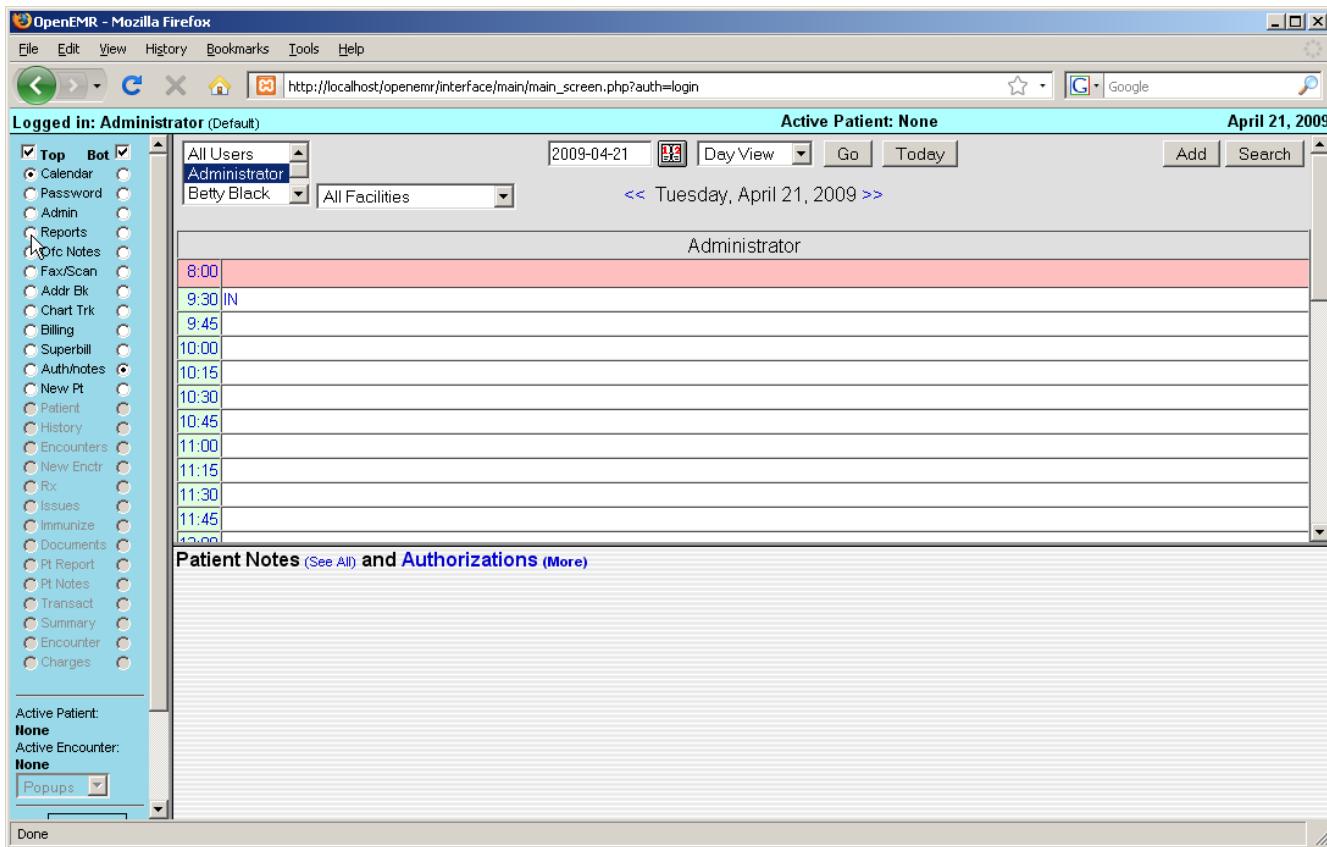
Patient: Rod Roark
Provider: Betty Black Ins1: Pacific Health
Invoice: 1.23
Svc Date: 2009-04-17 Done with: None Ins1 Ins2 Check/EOB No.: 65432
Bill Date: 2009-04-17 Now posting for: Ins1 Ins2 Ins3 Patient Check/EOB Date: 2009-04-28
 Needs secondary billing Save Cancel Deposit Date:

Code	Charge	Balance	By/Source	Date	Pay	Adjust	Reason
99203	136.57		Ins2/22334 Ins1/12345 Ins2/22334	2009-04-21 2009-04-21 2009-04-21	15.00 85.00 20.00	16.57	Ins adjust Ins2
		15.00			15		

Done

Reporting

Within OpenEMR there are a wide array of reports you can generate which may be useful for your practice. These include general reports such as appointment and encounter reports, billing reports, and patient specific reporting.



General Reports

Most general reporting tools can be found by selecting 'Reports' from the navigation menu at left. If you are using the Tree View scheme, the list of available reports is divided into a hierarchical list within the navigation menu.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The menu bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL "http://localhost/openemr/interface/main/main_screen.php?auth=login". The top status bar displays "Logged in: Administrator (Default)", "Active Patient: None", and the date "April 21, 2009". On the left, a sidebar titled "Top Bot" lists various menu items with icons: Calendar, Password, Admin, Reports (selected), Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, RX, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. A list of report options is shown on the right, including Superbill Report, Appointments Report, Encounters Report, Appointments-Encounters Report, Patient Insurance Distribution Report, Indigent Patients Report, Unique Seen Patients Report, Patient List, Front Office Receipts Report, Prescriptions Report, Sales by Product Report, Collections Report, Referrals Report, Receipts by Payment Method Report, Chart Check-in/out Activity Report, Charts Checked Out, and Services by Category. Below this is a "[printable]" link and a search bar for "Reports: Aggregate Race Statistics" with fields for Var1, Var2, Show (set to 10), and a Go button. The main content area shows the date "Tuesday, April , 2009". A sidebar on the left shows Active Patient: None, Active Encounter: None, and a dropdown menu for Popups.

Examples of some commonly used reports:

The Superbill Report presents you with a dialog for selecting a date range.

The screenshot shows a Firefox window with the URL "http://localhost/openemr/interface/reports/custom_report_range.php". The page content is a form for selecting a date range for Superbills. It contains the following text: "Superbills, sometimes referred to as Encounter Forms or Routing Slips, are an essential part of most medical practices." Below this are two input fields: "Start Date: 20090322" and "End Date: 20090421", both with "(format=YYYYMMDD)" notes. A "Submit" button is at the bottom. The status bar at the bottom of the browser window shows "Done".

Clicking 'Submit' produces a report for each encounter in the date range, and shows patient demographics and insurance information

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/custom_report_range.php

OpenEMR http://localhost...eport_range.php

Patient Data:

Title: Mr.	First Name: Rod	Last Name: Roark	Sex: Male	SS: 111-22-3333	Date of Birth: 1985-08-06
Street: 321 SW Capitol Hwy	City: Portland	Zip: 97219	Country: USA	Occupation: Engineer	Home Phone: 503-456-7890
Business Phone: 503-112-3334	Contact Phone: 971-222-3333	Contact Person: Wife	Allows Mail: NO	Allows Voice msgs: YES	Notice Received: YES
Leave Message With: wife					

Insurance Data:

Primary:

Provider: Pacific Health	Plan Name: PH 7.0	Policy Number: 1122334	Group Number: 1234	Subscriber First Name: Rod	Subscriber Last Name: Roark
Subscriber Relationship: self	Subscriber SS: 111-22-3333	Subscriber Date of Birth: 2009-04-14	Subscriber Phone: 503-456-7890	Subscriber Address: 321 SW Capitol Hwy	Subscriber Zip: 97219
Subscriber City: Portland	Subscriber State: OR	Subscriber Country: USA	Subscriber Employer: NW Company	Subscriber Employer Street: 44566 Industry Way	Subscriber Employer City: Portland
Subscriber Employer Zip: 97002	Subscriber Employer State: OR	Subscriber Employer Country: USA			

Secondary:

Provider: MedOne	Plan Name: MedOne Gold	Policy Number: 543216	Group Number: 1112	Subscriber First Name: Rod	Subscriber Last Name: Roark
Subscriber Relationship: self	Subscriber SS: 111-22-3333	Subscriber Date of Birth: 1985-08-06	Subscriber Phone: 503-456-7890	Subscriber Address: 321 SW Capitol Hwy	Subscriber Zip: 97219
Subscriber City: Portland	Subscriber State: USA	Subscriber Country: NW Company	Subscriber Employer: 44566 Industry Way	Subscriber Employer Street: 44566 Industry Way	Subscriber Employer City: Portland
Subscriber Employer Zip: 97002	Subscriber Employer State: OR	Subscriber Employer Country: USA			

Done

As well as the billing codes and amounts.

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/custom_report_range.php

OpenEMR http://localhost...eport_range.php

Secondary:

Provider: MedOne	Plan Name: MedOne Gold	Policy Number: 543216	Group Number: 1112	Subscriber First Name: Rod	Subscriber Last Name: Roark
Subscriber Relationship: self	Subscriber SS: 111-22-3333	Subscriber Date of Birth: 1985-08-06	Subscriber Phone: 503-456-7890	Subscriber Address: 321 SW Capitol Hwy	Subscriber Zip: 97219
Subscriber City: Portland	Subscriber State: USA	Subscriber Country: NW Company	Subscriber Employer: 44566 Industry Way	Subscriber Employer Street: 44566 Industry Way	Subscriber Employer City: Portland
Subscriber Employer State: OR	Subscriber Employer Country: USA				

Tertiary:

Subscriber SS: Subscriber Date of Birth: 0000-00-00

Billing Information:

Date	Provider	Code	Fee
2009-04-17 05:38 pm	Betty Black	CPT4: 99203	136.57
2009-04-17 05:38 pm	Betty Black	ICD9: 477.8 Allergic rhinitis, other allergen	0.00

Sub-Total 136.57
Paid 0.00
Total 136.57

Physician Signature: _____

Done

The Appointments Report gives you a list of appointments for a given provider, or for all providers, in a specified date range. It can be sorted by clicking on any of the four column headings.

Appointments Report - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/appointments_report.php

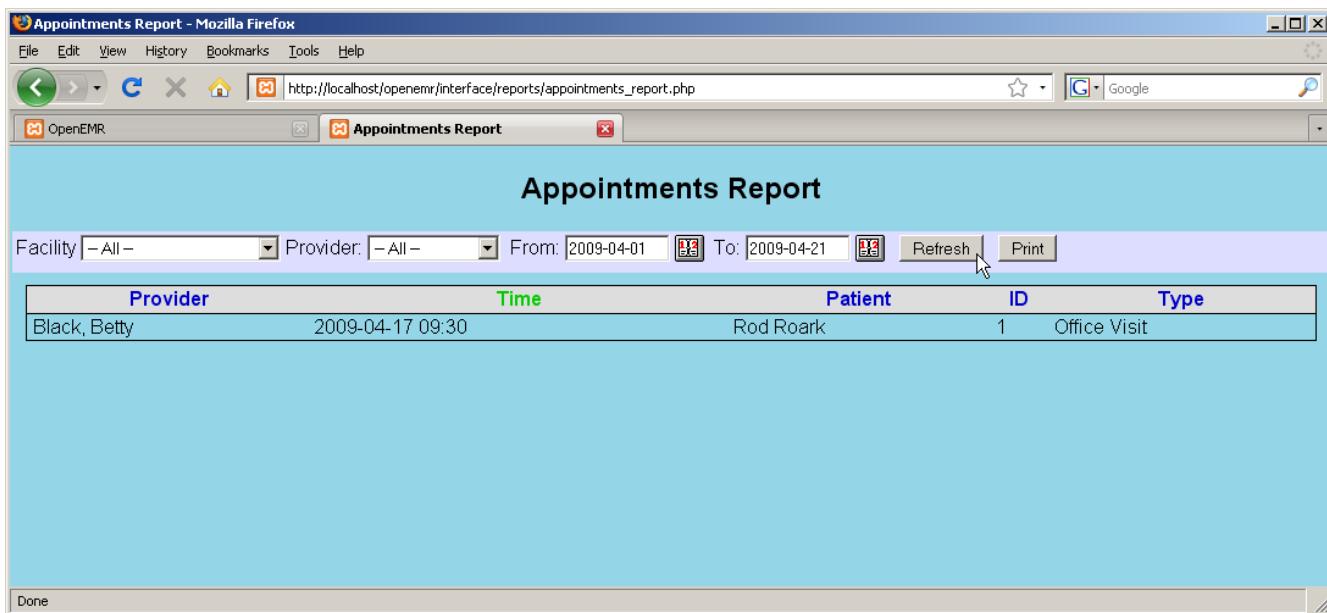
OpenEMR Appointments Report

Appointments Report

Facility: - All - Provider: - All - From: 2009-04-01 To: 2009-04-21 Refresh Print

Provider	Time	Patient	ID	Type
Black, Betty	2009-04-17 09:30	Rod Roark	1	Office Visit

Done



The Appointments and Encounters Report gives you a useful cross-reference of appointments with their corresponding encounters. This allows you to easily spot many types of errors, such as appointments with missing encounters, encounters with missing appointments, missing charges, and authorizations or justifications that are required but not done.

Appointments and Encounters - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/appt_encounter_report.php

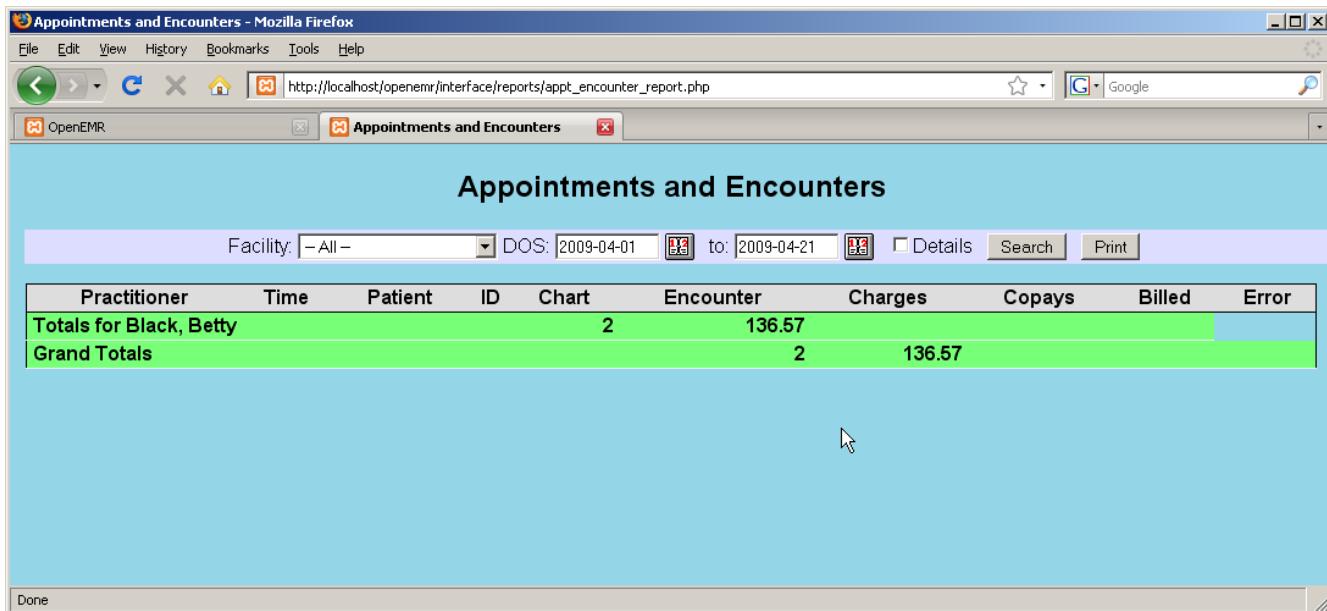
OpenEMR Appointments and Encounters

Appointments and Encounters

Facility: - All - DOS: 2009-04-01 to: 2009-04-21 Details Search Print

Practitioner	Time	Patient	ID	Chart	Encounter	Charges	Copays	Billed	Error
Totals for Black, Betty				2	136.57				
Grand Totals					2	136.57			

Done



The Insurance Distribution report shows you how many patients seen over a given time period use each kind of insurance.

Patient Insurance Distribution - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/insurance_allocation_report.php

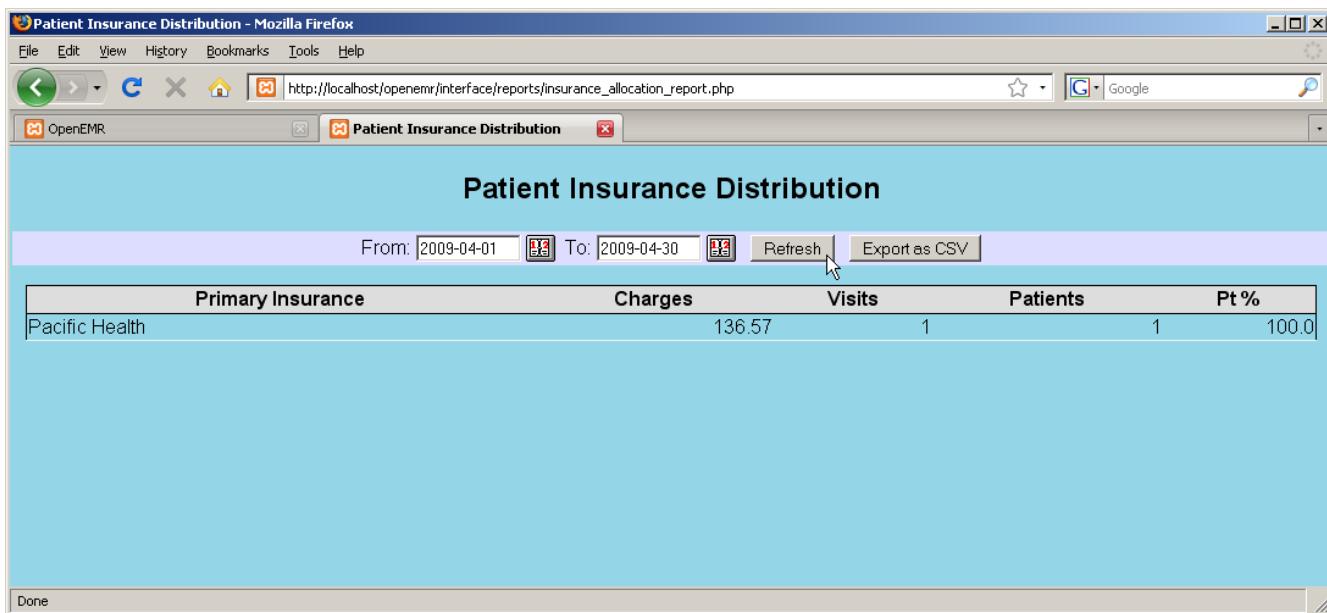
OpenEMR Patient Insurance Distribution

Patient Insurance Distribution

From: [2009-04-01] To: [2009-04-30] Export as CSV

Primary Insurance	Charges	Visits	Patients	Pt %
Pacific Health	136.57	1	1	100.0

Done



The Indigent Patients report lists all encounters for patients that were seen without insurance. (None shown here.)

Indigent Patients Report - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/indigent_patients_report.php

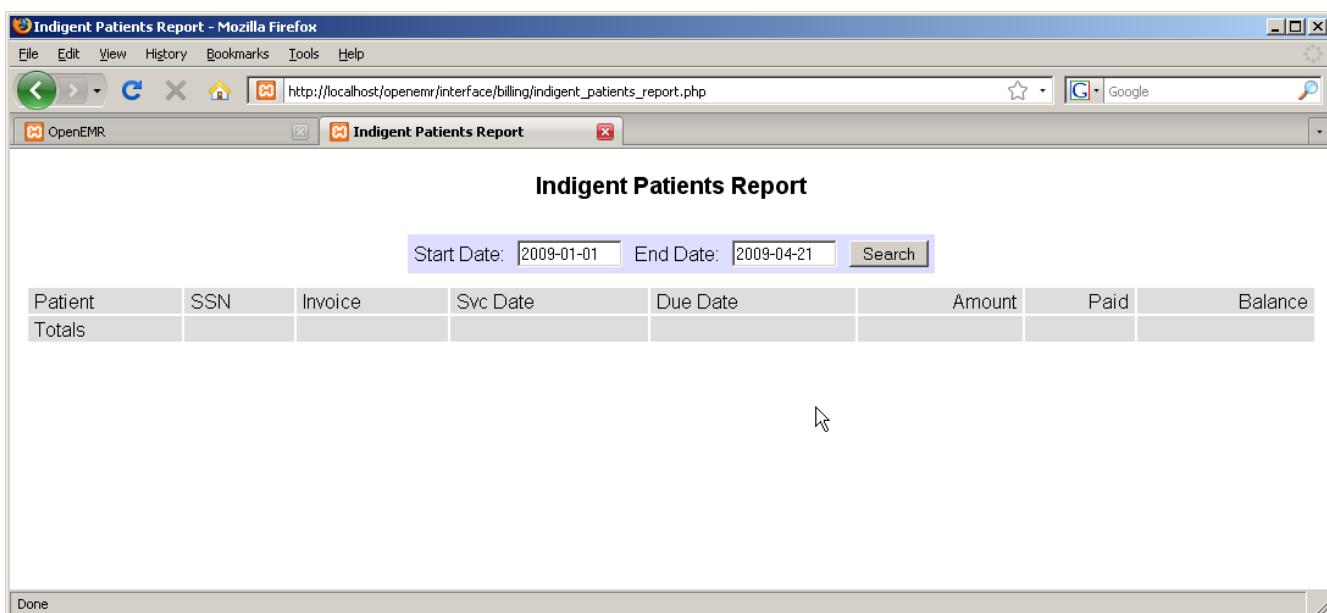
OpenEMR Indigent Patients Report

Indigent Patients Report

Start Date: [2009-01-01] End Date: [2009-04-21]

Patient	SSN	Invoice	Svc Date	Due Date	Amount	Paid	Balance
Totals							

Done



Billing Reports

From the main Billing page select 'Reports'.

The screenshot shows the 'Billing Report' section of the OpenEMR interface. On the left is a vertical sidebar with a tree view of various medical records and administrative functions. The main area has a light blue background and contains several input fields and buttons. At the top right, it says 'Active Patient: None' and 'April 21, 2009'. Below this, there's a search bar with 'From: 2009-04-21' and 'To: []'. To the right of the date are two checkboxes: 'Show Unbilled Only' (checked) and 'Show Authorized Only' (unchecked). Further right are buttons for '[Change View] or [Export OFX]', '[View Printable Report]', '[Reports]', '[EOBs]', '[View Log]', and '[Select All]'. Below these buttons are three more buttons: 'Generate X12', 'Generate HCFA', and 'Mark as Cleared'. To the right of these buttons is the text 'HCFA Margins: Left: 24 Top: 27'. At the bottom left of the main area, there's a link 'javascript:void window.open('sl_receipts_report.php')'.

This is the Cash Receipts report. It breaks down gross income by provider for a given time period.

The screenshot shows the 'Cash Receipts by Provider' report. The title is at the top center. Below the title is a search bar with dropdown menus for 'Facilities' and 'Providers', a 'Payment Date' dropdown set to 'From: 2009-04-01 To: 2009-04-30', and checkboxes for 'CPT', 'ICD', 'Details', and 'Procedures'. There are also 'Refresh' and 'Print' buttons. The main content area is a table with columns for 'Practitioner', 'Date', and 'Received'. It shows data for 'Totals for Betty Black' and 'Grand Totals'. At the bottom left is a 'Done' button.

Practitioner	Date	Received
Totals for Betty Black		120.00
Grand Totals		120.00

The user can also elect to see a detailed breakdown of cash receipts, itemizing each procedure for which a charge was made.

Cash Receipts by Provider - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl_receipts_report.php

OpenEMR Cash Receipts by Provider

Cash Receipts by Provider

– All Facilities – | – All Providers – | Payment Date | From: 2009-04-01 | To: 2009-04-30 | CPT: | ICD: | Details Procedures

Practitioner	Date	Invoice	Procedure	Prof.	Clinic
Betty Black	2009-04-21	1.23	99203	85.00	
	2009-04-21	1.23	99203	20.00	
	2009-04-28	1.23	99203	15.00	
Totals for Betty Black				120.00	
Grand Totals				120.00	

Done

Patient Reports

When a patient is active within the system, the user has the option of generating a report for that specific patient. To do so, click on 'Pt Report' which is now visible in the navigation menu (found under 'Patient/Client – Medical Record' in Tree View).

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/Notes New Pt Patient History Encounters New Enchr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: Rod Roark (1) Active Encounter: None Popups Find: r by: Name ID SSN DOB Logout

Demographics (More) (Delete)

Who Name: Mr. Rod Roark DOB: 1985-08-06 S.S.: 111-22-3333 Marital Status: Married **External ID:** 1 **Sex:** Male **License/ID:** 1234567 **Balance Due:** \$0.00 **Contact** **User Defined:** Address: 321 SW Capitol Hwy State: City: Portland Postal Code: 97219 Country: USA Emergency Contact: Wife Home Phone: 503-456-7890 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896 **Choices** **Medical Problems (More)** bronchitis **Allergies (More)** penicillin **Medications (More)** Claritin D **Immunizations (More)** 2009-04-21 - DT 1 **Prescriptions** Claritin D 1 in tablet q.d. **Notes (More)** Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

The user can choose to include or omit a wide variety of patient information. When satisfied with your selections, click 'Generate Report'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Patient Report [Check All] [Clear All]

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Demographics Immunizations
 History Patient Notes
 Insurance Transactions
 Billing Communications

Generate Report

Issues:

Allergies
 penicillin 2009-01-01 Active Reminded 4/10 5PM (2009-04-17)

Medical Problems
 bronchitis 2009-04-17 Active SOAP

Medications
 Claritin D 2009-04-17 Active

Generate Report

Documents:

Name: insurance_card.jpg
 Insurance Card Name: insurance_card.jpg.1

Generate Report

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Done

This produces a report including all the specified patient information.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Patient Report (Back) [Printable Version]

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Patient Data:

Who Name: Mr. Rod Roark External ID: 1
DOB: 1985-08-06 Sex: Male
S.S.: 111-22-3333 License/ID: 1234567

Contact Marital Status: Married
User Defined:
Address: 321 SW Capitol Hwy City: Portland
State: Postal Code: 97219
Country: USA Emergency Contact: Wife
Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
Work Phone: 503-112-3334 Mobile Phone: 971-564-7896

Choices Contact Email: mr.rod@gmail.com
Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland

HIPAA Notice Received: YES **Allow Voice Message:** YES
Allow Mail Message: NO **Allow SMS:** NO
Allow Email: YES **Leave Message With:** wife
Occupation: Engineer **Employer Name:** NW Company
Employer Address: 44566 Industry Way **City:** Portland
State: OR **Postal Code:** 97002
Country: USA

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Done

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Billing Information:
2009-04-17 : (CPT4) 99203 -
2009-04-17 : (ICD9) 477.8 - Allergic rhinitis, other allergen

Patient Immunization:
2009-04-21 - DT 1

Patient Notes:
2009-04-21: 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Patient Transactions:
2009-04-21:(Referral) See Dr. Green for lesion on scalp.
2009-04-21:(Physician Request) request pre-authorization for air filtration system in patient home.

Issues

Allergies:
penicillin:

Medical Problems:
bronchitis:
[Diagnosis]
ICD9:477.8: Allergic rhinitis, other allergen

New Patient Encounter

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

New Patient Encounter
(2009-04-17) Provider: Betty Black
Reason: cough & chest congestion
Facility:
Procedure: 99203

SOAP
(2009-04-17)
Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Document 'insurance_card.jpg'

