

Process Guideline

9.3.1

Basic Visit Reports

Admin staff | Clinic staff

OpenEMR version

4.1

Last update

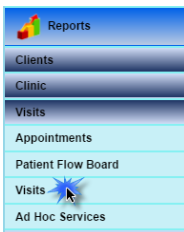
June 16, 2017

Author(s): X Gonzalez Page 1

Steps Menu |

Visit Reports / Examples

Visits



Most OpenEMR reports can be

- Submitted to the screen
- Exported to comma separated value (CSV)
- Printed to paper



Report – Today's visits – End of day report - Onscreen

Sample Report: List of all Visits grouped by service provider (e.g. today).

Uses: End-of-day control, Verify data completeness, identify open/empty visits

Select: Select Reports > Visits > Details > Press Refresh button.

To verify that all visit data were properly entered mark Details checkbox. To produce a report of open visits, select Open/Empty visits only, and close open visits at EOD.

Note: Empty visits are those with no services or products entered in the Tally Sheet. However, these visits may have other relevant data (e.g. health history); therefore, before an authorised person deletes the visit, data must be verified and tally sheet

Report visits related to specific services - CSV

Sample Report: List of all Visits including abortion counselling and medical abortion, selected from MA service list in Code Finder

Code Finder - Google Chrome

emr.ippf.org/emr/411/interface/patient_file/encounter/find_code_dynamic.php

375009	Health Certificate
375010	Form re: Immigration
375011	Counseling - General
375011	Phlebotomy
395549	Test Con Accounts - Television cabi
ADM - 001	Registration Fee
ADM - 010	Sale of Oral
ADM-050	Theater Rental (LA)
ADM-052	Theater Rental (SA)
CAC-010	Abortion Induced (Surgical) - OTHER
CAC-015	Abortion / Pre Abortion Counseling - Counseling on HIV Testing
CAC-016	Abortion / Pre Abortion Counseling - OTHER
CAC-017	Obstetrics - Pre natal Counseling - Unplanned Pregnancy
CAC-018	Abortion Counseling - Post Abortion Counseling and family planning counseling
CAC-019	Abortion - Counseling - unable to categorize
CAC-020	Abortion / Pre Abortion Counseling Harm Reduction Initial Consultation
CAC-021	Abortion Counseling Harm Reduction Follow-up Consultation
CAC-022	Abortion Services - OTHER
CAC-023	Abortion Induced (Medically - Drug Induced (Misoprostol Only)
CAC-024	Abortion - Management - Medical - Methotrexate and misoprostol
CAC-025	Abortion - Post Abortion Follow-up - OTHER (including treatment of complications) M
CAC-026	Abortion Induced (Medical) - OTHER
CAC-027	Abortion - Management - Medical - follow up
CAC-028	Abortion Induced (Surgical) - Dilatation And Curettage (D&C)
CAC-029	Abortion - Management - Surgical - Ethacridine lactate
CAC-030	Abortion - Post Abortion Follow-up - OTHER (including treatment of complications) S

Visits Report

Clinic: -- All -- From: 2017-05-04 To: 2017-05-04

Default Provider: -- All -- Service Provider: -- All --

☐ New ☐ Open/Empty Only ☒ Details

Default Provider	Date	Client	ID	Status	Visit	Form	Coding
Unassigned--	04/05/2017	Aaron, Mary Ann	AAR-2016-06-22-02	Closed	Pap Smear	Unknown: GYN-032, GYN-034	
Casimiro, Nurse Des	04/05/2017	Addison, ALMA	3002	Closed	Urology consultation	Casimiro,N: 375005, LC-002	
Desir, Dr. Ernest	04/05/2017	Ackroad, RESHMA		Closed	VIA screening	Desir,D: GYN-010, GYN-035	
	04/05/2017	Alassi, CAROL		Closed	Gyn visit	Desir,D: GYN-010, GYN-016	
	04/05/2017	Babel, Montserrat		Closed	Obstetric consultation	Desir,D: 252101, FH-001, FH-002	
	04/05/2017	Addison, LINDA		Open	Youth seervices		
	04/05/2017	Clarke, Ricardo	56	Open	Urology consultation	Desir,D: 257002	
DrShrotri, Laxmikant	04/05/2017	Burton, Donna	12	Closed	Prenatal checkup	DrShrotri,L: 252101, 256104, CON-044	
	04/05/2017	Amber, Gloria	2009-11-24-001	Closed	Infertility	DrShrotri,L: 256001, 256003	
	04/05/2017	Carlsile, Belinda	285233	Open	Pap smear	DrShrotri,L: 257002	

Open visit report control

Visits Report

Clinic: -- All -- From: 2017-05-04 To: 2017-05-04

Default Provider: -- All -- Service Provider: -- All --

☐ New ☒ Open/Empty Only ☐ Details

Default Provider	Date	Client	ID	Status	Visit	Form	Coding
Unassigned--	04/05/2017	Aaron, Mary Ann	AAR-2016-06-22-02	Open	Pap Smear	Unknown: GYN-032, GYN-034, GYN-037, GYN-038	
Desir, Dr. Ernest	04/05/2017	Clarke, Ricardo	56	Open	Urology consultation	Desir,D: 257002	
DrShrotri, Laxmikant	04/05/2017	Carlsile, Belinda	285233	Open	Pap smear	DrShrotri,L: 257002	
-- Total --			3				

Visits Report

Clinic: -- All -- From: 2010-01-01 To: 2016-12-31

Default Provider: -- All -- Service Provider: -- All --

Service: **MA CAC-023, MA CAC-016** ☐ New ☐ Open/Empty Only ☒ Details

Default Provider	Date	Client	ID	Status	Visit	Form	Coding
Dr. Jhonson	02/04/2014	AMIN, JOBADYUL	765959409	Open	GCACI	IPPF GCACIPPF GCACIPPF GCAC	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	03/04/2014	Thapa, SASI	sax/03042012/008	Closed	GCACI	IPPF GCACIPPF GCAC	BFFA,B: CAC-016, CAC-046
	03/04/2014	Thapa, RAMA	ram/03042014/001	Closed	GCACI	IPPF GCAC	BFFA,B: CAC-016, CAC-046
	03/04/2014	Rana, LAILA	lai/04042014/001	Open	GCACI	IPPF GCAC	BFFA,B: CAC-016, CAC-046
Dr. Anu	14/04/2014	OJHA, 7809870	77576	Open	GCACI	IPPF GCACIPPF GCAC	BFFA,B: CAC-015, CAC-016, CAC-020, CAC-051
	01/05/2014	THAPA, PRAMIJ	98639	Open	GCACI	IPPF GCAC	BFFA,B: CAC-016, CAC-046
	13/05/2014	Amin, ARMIN	2123	Open	GCACI	IPPF GCACProcedure Order	CAC-048BFFA,B: CAC-015, CAC-015, CAC-015, CAC-016, CAC-016
Dr. Smith	07/02/2014	Grimes, ELLEN	20140207_01GRI	Open	GCACI	IPPF GCACProcedure Order	CAC-023, CAC-046, CAC-047
	11/02/2014	Addison, LINDA	303303	Closed	GCACI	IPPF GCACProcedure Order	CAC-023, CAC-046, CAC-047
	11/02/2014	Arrovi, Amira	2009-04-10-04	Closed	GCACI	IPPF GCACProcedure Order	CAC-023, CAC-046, CAC-047
	14/02/2014	Test1951, TESTER	666455	Closed	GCACI	IPPF GCACProcedure Order	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	14/02/2014	Lay, MARTHA	MM-034	Closed	GCACI	IPPF GCACProcedure Order	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	15/02/2014	Williams, Wanda T	66455566	Closed	GCACI	IPPF GCACProcedure Order	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	17/02/2014	Gordon, BABS	20140210_01GOR	Closed	GCACI	IPPF GCACProcedure Order	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	02/04/2014	Amin, ARMIN	836438478	Open	GCACI	IPPF GCAC	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	03/04/2014	Mary, MARY	20140403_201MAR	Open	GCACI	IPPF GCACProcedure Order	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	03/04/2014	Jane, JANE	20140403_202JAN	Closed	GCACI	IPPF GCAC	CAC-016, CAC-036, CAC-042, FH-001, FH-002
	09/04/2014	ZACV, ZAC	ZAC_1810201301	Closed	GCACI	IPPF GCAC	CAC-016, CAC-036, CAC-042, FH-001, FH-002

Admin staff | Clinic staff

Author(s): X Gonzalez Page 2

Services provided Reports / Examples



Client ID	Client Name	Service Date	Invoice	Item	Description	Units	Service Provider	User
GUI-15092015-001	Guiney, Jill	17/03/2017	000681	CAC-016	Abortion / Pre Abortion Counselling - OTHER	1 user1	jguiney	jguiney
GUI-14092015-001	Guiney, Joan	17/03/2017	000682	CAC-016	Abortion / Pre Abortion Counselling - OTHER	1 user1	jguiney	jguiney
GUI-15092015-002	Guiney, Sue	17/03/2017	000683	CAC-016	Abortion / Pre Abortion Counselling - OTHER	1 user1	jguiney	jguiney
GUI-15092015-002	Guiney, Sue	17/03/2017	000683	CAC-018	Abortion Counselling - Post Abortion Counselling and family planning counselling	1 user1	jguiney	jguiney
20140217_03GUI	Guiney, JOJO	17/03/2017	000684	CAC-016	Abortion / Pre Abortion Counselling - OTHER	1 user1	jguiney	jguiney
20140217_03GUI	Guiney, JOJO	17/03/2017	000684	CAC-018	Abortion Counselling - Post Abortion Counselling and family planning counselling	1 user1	jguiney	jguiney
					Abortion Induced (Medical) - Drug Induced			

Purpose	To review basic visit reports including services provided during visits
Process description	Producing visit reports allow clinic managers and staff to verify data quality and completeness, review visit status to ensure no empty or open visits, assess service provision by clinic and provider, as well as to reconcile financial with service data
Pre-conditions	Visit data has been entered and data quality verified.
Observations	OpenEMR provides multiple reports for revising and cross-checking data. In addition to being displayed onscreen, most reports can be exported to comma-separated value (CSV) format readable with Excel, and to PDF to be stored digitally or printed in paper.