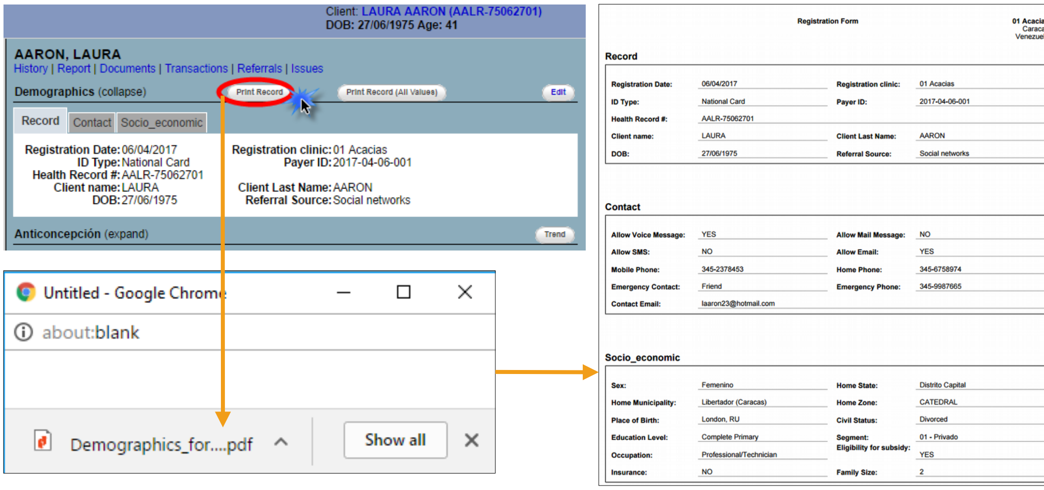
Process Guideline	1.1.3	Retrieving client personal data		Clinic staff & managers | Clinic / HQ
OpenEMR version	4.1	Last update	May 26, 2017	Author(s): X Gonzalez

Steps | **Menu | Description** | **Client-centred process: Individual client reports**

1. Client record

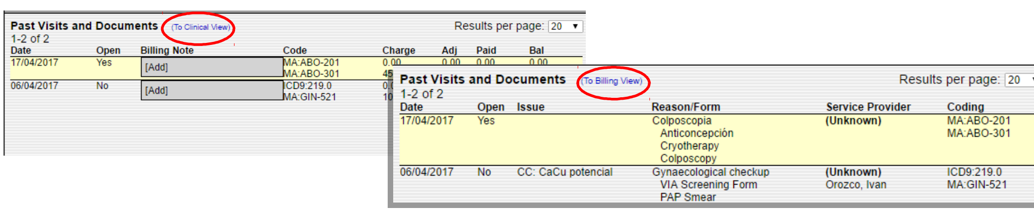
Individual client record data can be displayed onscreen.

The Print Record button, located in the client record, downloads a PDF file. which can be reviewed onscreen or printed



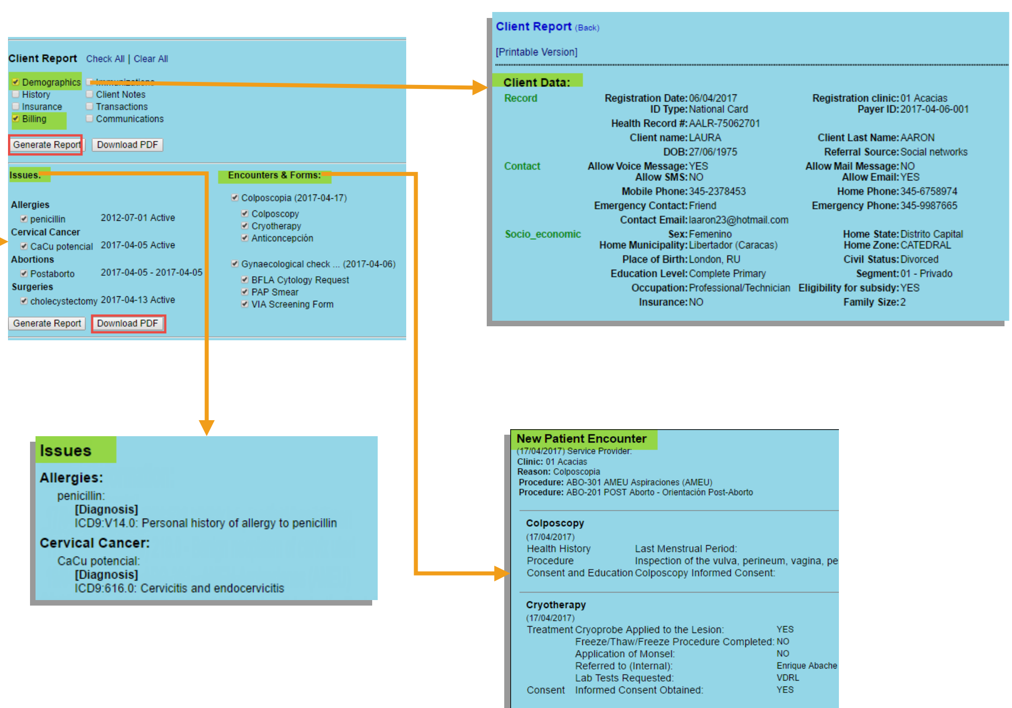
2. Client visit history

Hand-in-hand with the client record, her/his visit history provides a glimpse of both the billing and clinical view (see blue toggle link at the top).



3. Selective clinic health record

The clinic eHR is generated by selecting the appropriate sections in the Report option, including: Demographics, History, Insurance, Billing, etc., as well as selected evolution notes on Issues and Encounter (visit) specific data. These data can be either displayed onscreen (Generate Report) or Downloaded as a PDF file to be either emailed or printed.

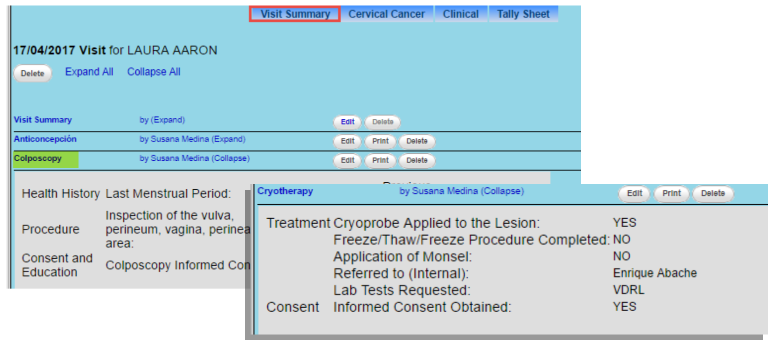


Steps **Menu | Description** **Screenshots**

4. Clinic Findings

Specific clinic findings can be readily available from the Visit Summary page, which displays services provided in previous or today's visits.

By selecting the appropriate link (e.g. Colposcopy), a pop-up window displays details, which can be edited, printed or deleted by the Physician.

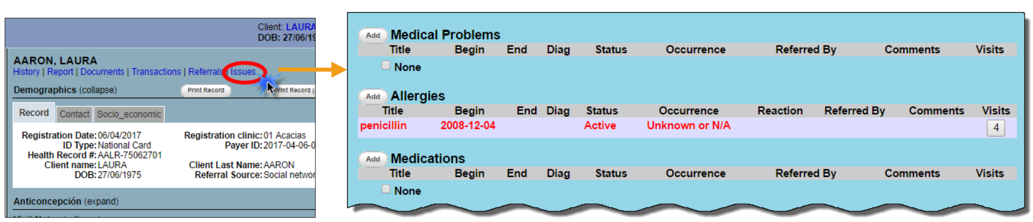


5. Clinic Referrals

A list of referrals for the active client can be displayed or exported in table form by selecting Referrals in the left-hand main menu.

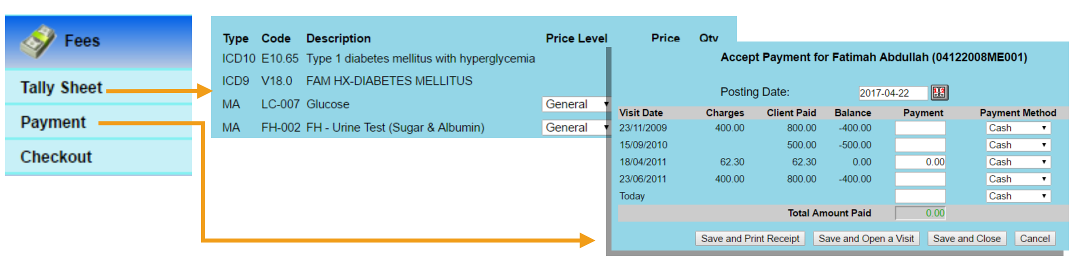
6. Clinic Issues

A complete list of issues recorded for the active client can be obtained by selecting Issues in the client record top menu.



7. Financial / Statistical data

Tally sheet displays services, products and Dx. Payment reflects financial data of active client



Purpose	To provide an overview of ways to retrieve individual client data
Process description	Depending on information needs, OpenEMR users can obtain individual and group data. Retrieving individual client data, as described in this Guideline, is mainly used by clinic staff to inform diagnostic impression and health decision-making at consultation time.
Pre-conditions	Personal data, previous health history and visit-related data must be entered in advance, as described in Process Guideline 1.1.2
Observations	Importantly, a major change in the transition from paper clinic history (where data is written & read in the same document) to electronic Health Record (eHR) technology, is that data is collected in data-entry forms and retrieved in customised reports.