

## Process Guideline

1.1.3

## Retrieving client personal data

## Clinic staff & managers | Clinic / HQ

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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

Client: LAURA AARON (AALR-75062701)  
DOB: 27/06/1975 Age: 41

**AARON, LAURA**  
History | Report | Documents | Transactions | Referrals | Issues

Demographics (collapse)

Record | Contact | Socio\_economic

Registration Date: 06/04/2017  
ID Type: National Card  
Health Record #: AALR-75062701  
Client name: LAURA  
DOB: 27/06/1975

Registration clinic: 01 Acacias  
Payer ID: 2017-04-06-001  
Client Last Name: AARON  
Referral Source: Social networks

Anticoncepción (expand)

Print Record

Print Record (All Values)

Edit

Untitled - Google Chrome

about:blank

Demographics\_for....pdf

Show all

Registration Form

01 Acacias  
Caracas  
Venezuela

**Record**

Registration Date: 06/04/2017  
ID Type: National Card  
Health Record #: AALR-75062701  
Client name: LAURA  
DOB: 27/06/1975

Registration clinic: 01 Acacias  
Payer ID: 2017-04-06-001  
Client Last Name: AARON  
Referral Source: Social networks

**Contact**

Allow Voice Message: YES  
Allow SMS: NO  
Mobile Phone: 345-2378453  
Emergency Contact: Friend  
Contact Email: laaron23@hotmail.com

Allow Mail Message: NO  
Allow Email: YES  
Home Phone: 345-6758974  
Emergency Phone: 345-9987665

**Socio\_economic**

Sex: Femenino  
Home Municipality: Libertador (Caracas)  
Place of Birth: London, RU  
Education Level: Complete Primary  
Occupation: Professional/Technician  
Insurance: NO

Home State: Distrito Capital  
Home Zone: CATEDRAL  
Civil Status: Divorced  
Segment: 01 - Privado  
Eligibility for subsidy: YES  
Family Size: 2

#### 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).

Past Visits and Documents

1-2 of 2

Date	Open	Billing	Note	Code	Charge	Adj	Paid	Balance
17/04/2017	Yes	[Add]		MA-ABO-201	0.00	0.00	0.00	0.00
06/04/2017	No	[Add]		CD9:219.0	0.00	0.00	0.00	0.00
				MA-GIN-521	0.00	0.00	0.00	0.00

Results per page: 20

Past Visits and Documents

1-2 of 2

Date	Open	Issue	Reason/Form	Service Provider	Coding
17/04/2017	Yes		Colposcopia Anticoncepción Cryotherapy Colposcopy	(Unknown)	MA-ABO-201 MA-ABO-301
06/04/2017	No	CC: CaCu potencial	Gynaecological checkup VIA Screening Form PAP Smear	(Unknown) Orozco, Ivan	ICD9:219.0 MA-GIN-521

Results per page: 20

#### 3. Selective clinic health record

**AARON, LAURA**  
History | Report | Documents | Transactions | Referrals | Issues

Demographics (collapse)

Record | Contact | Socio\_economic

Registration Date: 06/04/2017

Client Report

Check All | Clear All

Demographics | History | Insurance | Billing | Client Notes | Transactions | Communications

Generate Report | Download PDF

**Issues**

Allergies

penicillin 2012-07-01 Active  
[Diagnosis]  
ICD9:V14.0: Personal history of allergy to penicillin

Cervical Cancer

CaCu potencial 2017-04-05 Active  
[Diagnosis]  
ICD9:616.0: Cervicitis and endocervicitis

Surgeries

cholecystectomy 2017-04-13 Active  
[Diagnosis]  
ICD9:56.2: Cholecystectomy

Generate Report | Download PDF

**Encounters & Forms**

Colposcopia (2017-04-17)  
Colposcopy  
Cryotherapy  
Anticoncepción

Gynaecological checkup... (2017-04-06)  
BFLA Cytology Request  
PAP Smear  
VIA Screening Form

Client Report (Back)

[Printable Version]

**Client Data:**

Record

Registration Date: 06/04/2017  
ID Type: National Card  
Health Record #: AALR-75062701  
Client name: LAURA  
DOB: 27/06/1975

Registration clinic: 01 Acacias  
Payer ID: 2017-04-06-001  
Client Last Name: AARON  
Referral Source: Social networks

Contact

Allow Voice Message: YES  
Allow SMS: NO  
Mobile Phone: 345-2378453  
Emergency Contact: Friend  
Contact Email: laaron23@hotmail.com

Allow Mail Message: NO  
Allow Email: YES  
Home Phone: 345-6758974  
Emergency Phone: 345-9987665

Socio\_economic

Sex: Femenino  
Home Municipality: Libertador (Caracas)  
Place of Birth: London, RU  
Education Level: Complete Primary  
Occupation: Professional/Technician  
Insurance: NO

Home State: Distrito Capital  
Home Zone: CATEDRAL  
Civil Status: Divorced  
Segment: 01 - Privado  
Eligibility for subsidy: YES  
Family Size: 2

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.

**Issues**

Allergies

penicillin  
[Diagnosis]  
ICD9:V14.0: Personal history of allergy to penicillin

Cervical Cancer

CaCu potencial  
[Diagnosis]  
ICD9:616.0: Cervicitis and endocervicitis

**New Patient Encounter**

(17/04/2017) Service Provider:  
Clinic: 01 Acacias  
Reason: Colposcopia  
Procedure: ABO-301 AMEU Aspiraciones (AMEU)  
Procedure: ABO-201 POST Aborto - Orientación Post-Aborto

**Colposcopy**

(17/04/2017)  
Health History: Last Menstrual Period:  
Procedure: Inspection of the vulva, perineum, vagina, pe  
Consent and Education: Colposcopy Informed Consent:

**Cryotherapy**

(17/04/2017)  
Treatment Cryoprobe Applied to the Lesion: YES  
Freeze/Thaw/Freeze Procedure Completed: NO  
Application of Monsel: NO  
Referred to (Internal): Enrique Abache  
Lab Tests Requested: VDRL  
Consent: Informed Consent Obtained: YES

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## 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.

Refer By	Refer To (Org / Person)	Refer Date	Expected Date	Reply Date	Client	ID	Reason	Service
Dr. Ernest Desir	/ EN Counsellor	29/03/2017	30/03/2017	31/03/2017	Fatimah Abdullah	04122008ME001	Counseling required	GBV-020: GBV Counseling (individual)
Dr. Ernest Desir	/ Private Physician	29/03/2017	01/05/2017		Fatimah Abdullah	04122008ME001	Cauterization required	GYN-052: GYN - Cauterization
EN Gynaecologist	/ EN Counsellor	03/07/2016	30/03/2017		Fatimah Abdullah	04122008ME001	VBG	262293229: Counseling - Family conflict
EN Gynaecologist	/ Private Physician	04/12/2008	04/06/2017	18/12/2008	Fatimah Abdullah	04122008ME001	MIR	252001:

Total Referrals: 4 Services: 4

### 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.