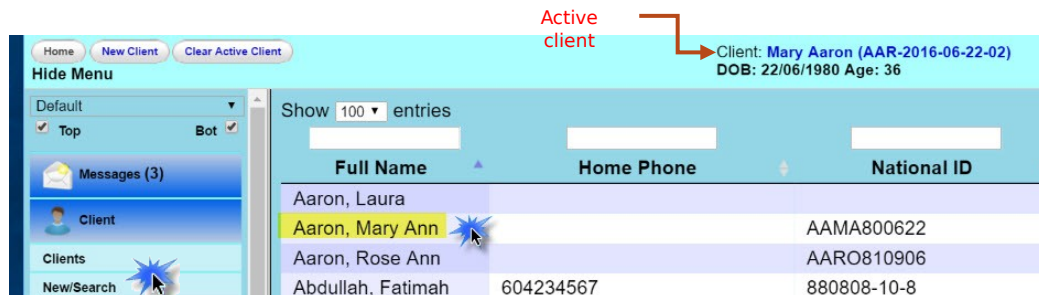| Process Guideline | 1.3.0 | Patient-Client visits-encounters | | All users| Administrative | Clinic |
|---|---|---|---|---|
| OpenEMR version | 4.1 | Last update | May 27, 2017 | Author(s): X Gonzalez |

Steps	Menu	Visit creation & Data entry / Examples

1 Selecting client record

Selecting Client > Clients displays the client list, which offers several options described in PG 1.2.0, like Alphabetic order (by default), client ID, etc. Once selected her/his name, the client record becomes **active**

Active client

Client: **Mary Aaron (AAR-2016-06-22-02)**
DOB: 22/06/1980 Age: 36
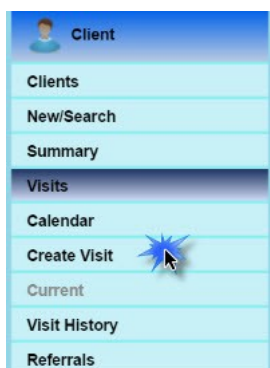
2 Creating a new visit

By selecting the Create Visit option, a New Visit Form is displayed in three sections:
Reason for Visit | Basic visit data | Issues to be monitored

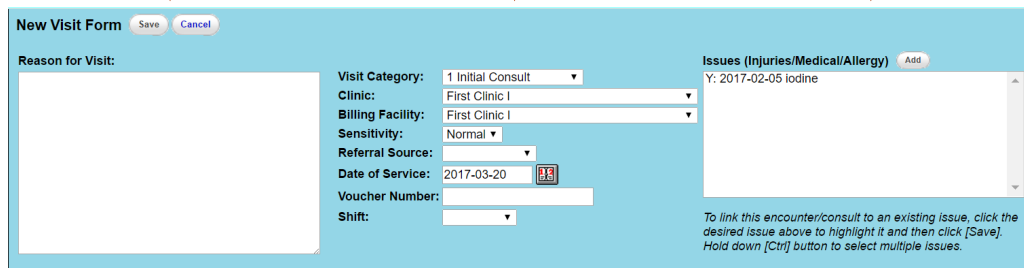Reason for Visit is an **open text** box, where client required service is recorded at admission.

Note that this information may be complemented or refined across the visit cycle.

As described in more detail below, basic visit data allows a quick register of visit characteristics in drop-down, **closed data** fields.

This allows further statistical analysis of visit events.

The issues section allows clinicians to enter relevant data whose evolution needs to be **monitored**.

For example: Allergies, surgeries, medical problems, major illnesses

New Visit Form Save Cancel

Reason for Visit:

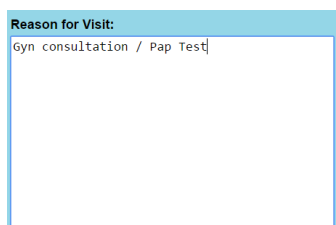|	
Visit Category:	1 Initial Consult ▾
Clinic:	First Clinic I ▾
Billing Facility:	First Clinic I ▾
Sensitivity:	Normal ▾
Referral Source:	▾
Date of Service:	2017-03-20
Voucher Number:	
Shift:	▾

Issues (Injuries/Medical/Allergy) Add
Y: 2017-02-05 iodine

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

3 Entering reason of visit

Reason for Visit:
Gyn consultation / Pap Test

Depending on the client flow in a particular clinic, a receptionist, a counsellor, a nurse or a physician can create the visit and enter the Reason for Visit.

This information will describe in generic terms the intended purpose of the visit but not necessarily the actual services and/or products to be provided which will be recorded in detail, in the Tally Sheet in terms of financial transactions (items to be invoiced), as well of health data related to the specific service(s) / Product(s) actually received.

Process Guideline	1.3.0	Patient-Client visits-encounters		All users	Administrative	Clinic
OpenEMR version	4.1	Last update	May 27, 2017	Author(s): X Gonzalez

Steps	Description	Visit creation & Data entry / Examples

4 Entering basic visit data

BASIC VISIT DATA

Visit Category: clinic (first or subsequent visit, e.g. follow up or re-supply; or administrative, e.g. payment, requesting health record, etc.)

Clinic: facility where services and/or products are provided

Billing facility: administrative location issuing the invoice

Sensitivity: Flag to control user access to data (normal, high, none)

Referral source: a user-defined list of persons or media where client learned about the clinic (e.g. client, employee, walk-in, radio, TV, etc.)

Date of service: YYYY-MM-DD of today or previous visit

Voucher number: Alphanumeric field for local relevant number (if any)

Shift: Morning | Afternoon | Evening

Issues (Injuries/Medical/Allergy) Add

Y: 2017-02-05 iodine

These alerts are also reflected in the client summary page

Issues displays alerts related to relevant client health data including:

- Medical problems
- Allergies
- Medications
- Surgeries
- Abortions
- Contraception
- Cervical cancer
- Prenatal

5 Saving visit form

Saving the visit form leads to a navigation panel from where clinic forms or a Tally sheet of service/product orders can be accessed.

Purpose	To understand the visit/encounter concept and its creation process
Process description	A visit or encounter is an event in which a client/patient attends a service delivery point (e.g. a clinic) where her/his e-Health record is created/found, receives services and/or products, and makes a payment or receives a donation. This guide describes how to create a visit, enter basic visit data, and save the visit form.
Pre-conditions	To create a new or open an existing visit, a client record must first be created/found and selected (activated). An active client name is displayed at the top of the OpenEMR screen, including ID, date of birth, and age, to ensure data corresponds to the right client.
Observations	All visits created in a day must be closed the same day, regardless the type or number of services and/or product received; even if no services/products are provided, Therefore, a supervisor must check periodically visit status.