

Process Guideline

1.3.0

Patient-Client visits-encounters

All users| Administrative | Clinic

Page 1 of 2

OpenEMR version

4.1

Last update

May 27, 2017

Author(s): X Gonzalez

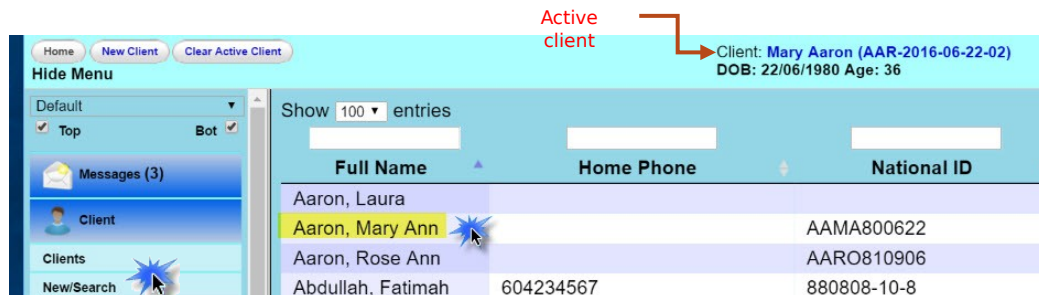
Steps

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**



Home New Client Clear Active Client

Hide Menu

Default

Top Bot

Messages (3)

Client

Clients

New/Search

Active client

Client: Mary Aaron (AAR-2016-06-22-02)
DOB: 22/06/1980 Age: 36

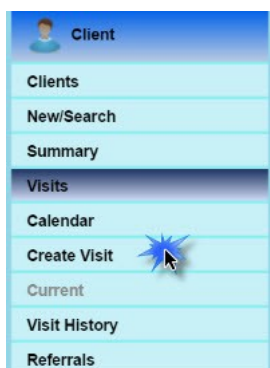
Show 100 entries

Full Name	Home Phone	National ID
Aaron, Laura		
Aaron, Mary Ann		AAMA800622
Aaron, Rose Ann		AARO810906
Abdullah, Fatimah	604234567	880808-10-8

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



Client

Clients

New/Search

Summary

Visits

Calendar

Create Visit

Current

Visit History

Referrals

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

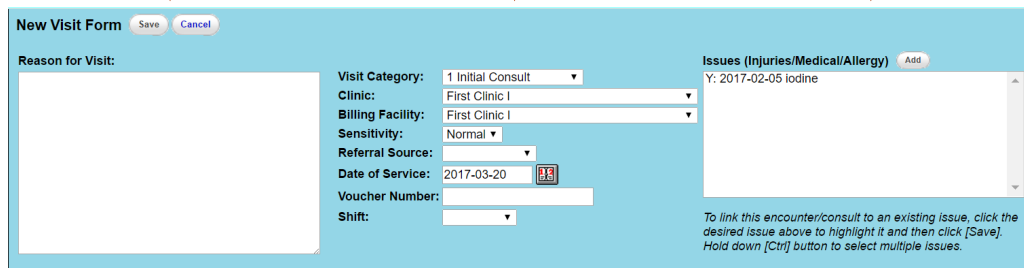
Note that this information may be complemented or refined across the visit cycle.

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:

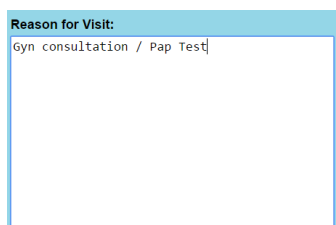
Shift:

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.

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Steps	Description	Visit creation & Data entry / Examples		

4 Entering basic visit data

Visit Category: 1 Initial Consult
Clinic: First Clinic I
Billing Facility: First Clinic I
Sensitivity: Normal
Referral Source:
Date of Service: 2016-07-03
Voucher Number:
Shift:

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)

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

Aaron, Mary

History | Report | Documents | Transactions | Referrals | Issues

Demographics (collapse) Print Record Print Record (All Values) Edit

Registration Form Contact Socio_Demographic Choices

Home Facility: First Clinic I Client ID: AAR-2016-06-22-02
National ID: AAMAR006022 Registration Date: 22/06/2016
First Name: MaryMiddle/Ann Last Name: Aaron
Mother's Name: Mary Sex: Female
Gender: Female DOB: 22/06/1980
Price Level: Referral Source: Walk-In
Insurer: Assuria

Contraception (expand)
Contraception New (expand)
Visit Notes (collapse)

Billing (expand)
Appointments (expand) Add
Clinical Reminders (expand) Edit
Patient Reminders (expand) Edit
Past Appointments (expand)
Medical Problems (collapse) Edit
Nothing Recorded
Allergies (collapse) Edit
Iodine
Medications (expand) Edit
Immunizations (expand) Edit
Prescription (expand) Edit

5 Saving visit form

New Visit Form Save Cancel

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

Client: Mary Aaron (AAR-2016-06-22-02) Visit History
DOB: 22/06/1980 Age: 36 Selected Visit: 20/03/2017 (2334) Xavier Gonzalez

Visit Summary Abortion Cervical Cancer Clinical FUSA Test Tally Sheet

20/03/2017 Visit for Mary Aaron
Delete Expand All Collapse All

☐ Provided Education Resource(s)?
☐ Provided Clinical Summary?
☐ Transition/Transfer of Care?
☐ Medication Reconciliation Performed?

Visit Summary by (Collapse) Edit Delete

Clinic: First Clinic I
Reason: Gyn consultation / Pap Test

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.