

Process Guideline

1.3. Managing visits-encounters

All users| Administrative | Clinic

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OpenEMR version

4.1

Last update

May 28, 2017

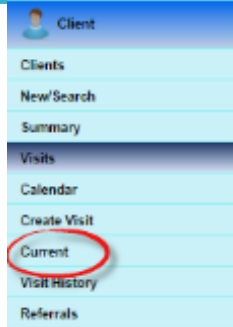
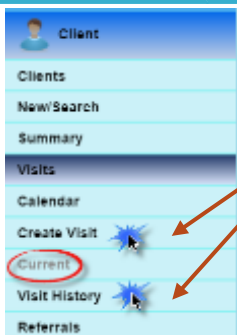
Author(s): X Gonzalez

Steps

Managing visits / Examples: open, edit, review and delete a visit

Current visit

Before the visit is either created or opened, there is no "current" visit available (shown greyed-out) in menu



To enable the registration of services and products, as well as clinic data for a particular client, a Visit form must be created in OpenEMR by relating the client with a current visit either new or selected from the Visit History panel.

Visit creation is covered in Guide 1.3.0. Once the visit has been created, it will be displayed in the Visit History panel:

Visit history

Linking client with visit

Past Visits and Documents

(To Clinical View)

Toggle between billing and clinical view (see next page)

Date	Open	Billing Note	Code	Charge
23/03/2017	Yes	Pending Lab tests to be reviewd		
11/02/2014	No	[Add]	MA:25227105	10.00
10/02/2011	No	[Add]	MA:111101 MA:252001 MA:252004	50.00 400.00 0.00

Select date to activate visit

Open/closed status

User notes

MA-defined service codes

Total charges applied

Editing a visit

From the Visit Summary panel (shown) one can access both Clinic Templates (e.g. Abortion, Cervical Cancer, etc.) and tally services and products provided during the visit (for statistical purposes).

The Edit button reopens the visit page and allows changes in:

- Reason of Visit
- Basic visit data
- Adding/updating Issues (i.e. health processes that need to be monitored, such as allergies, surgeries, major illnesses, etc.

Client: Rose Aaron (AAR-2016-06-22-01)
DOB: 06/09/1981 Age: 35

Visit History
Selected Visit: 22/06/2016 (2282)

Visit Summary | Abortion | Cervical Cancer | Clinical | FUSA | Test | Tally Sheet

This page | **Clinic templates** | **Serv/Prod order**

22/06/2016 Visit for Rose Aaron
Delete Expand All Collapse All

Visit Summary by (Collapse) Edit Delete

Clinic: First Clinic I
Reason: Gynaecology consultation

Client Visit Form Save Cancel

Reason for Visit:
Gynaecology consultation

Visit Category: 2 Re-Visit / Re-Supply
Clinic: First Clinic I
Billing Facility: First Clinic I
Sensitivity: Normal
Referral Source: Client
Date of Service: 2016-06-22
Voucher Number: 3354
Shift: Afternoon

Issues (Injuries/Medical/Allergy)
Add
Y: 2017-02-06 penicillin

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.

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Steps

Description

Visit creation & Data entry / Examples

Billing/Clinic views

The visit history panel provides useful information about financial (billing) transactions and provision of services. The blue link toggles between the two views.

Note that service codes are user defined and full description is included in Reports.

Importantly, Open status must be "No" for all visits at close of business day. Otherwise, the next time a visit is created, two or more visits may be receiving data.

Once the visit is closed, no services can be recorded unless the visit is reopen.

Past Visits and Documents (To Clinical View)

Results per page: 20

Date	Open	Billing Note	Code	Charge	Adj	Paid	Bal
11/02/2014	No	[Add]	MA:25227105	10.00	0.00	10.00	0.00
10/02/2011	No	[Add]	MA:111101	50.00	50.00	0.00	0.00
			MA:252001	400.00	400.00	0.00	0.00
			MA:252004	0.00	-54.00	54.00	0.00
			MA:25227105	0.00	0.00	0.00	0.00
			PROD:8	4.00	4.00	0.00	0.00
15/09/2010	No	[Add]	MA:1111302	40.00	0.00	30.00	10.00

Past Visits and Documents (To Billing View)

Results per page: 20

Date	Open	Issue	Reason/Form	Service Provider	Coding
11/02/2014	No		TEST	Doe, John	MA:25227105
10/02/2011	No		MR - IPPA C3 testing IPPF GCAC	(Unknown)	MA:111101 MA:252001 MA:252004 MA:25227105 PROD:8
15/09/2010	No		contraceptive	(Unknown)	MA:1111302

Deleting a visit

Deleting a visit has implications that need to be supervised. Not all system user profiles have access to deleting visits; therefore, an administrative procedure should be defined to authorize visit deletion.

In addition, deleting a visit requires confirmation as not only the visit but all subordinate data (i.e., financial transactions and clinical data) will also be removed.

Client: Rose Aaron (AAR-2016-06-22-01) Visit History
DOB: 06/09/1981 Age: 35 Selected Visit: 22/06/2016 (2282)

Visit Summary | Abortion | Cervical Cancer | Clinical | FUSA | Test | Tally Sheet

This page Clinic templates Serv/Prod order

22/06/2016 Visit for Rose Aaron

Delete Expand All Collapse All

Visit Summary by (Collapse) Edit Delete

Clinic: First Clinic I Reason: Gynaecology consultation

emr.ippf.org/emr/41x/interface/patient_file/deleter.php?encounterid=233

Do you really want to delete encounter 2335 and all subordinate data? This action will be logged!

Yes, Delete and Log No, Cancel

Purpose To manage a visit/encounter that has been created or reopened

Process description

Once a visit or encounter has been created or an old visit has been reopen, it becomes the "current" visit, which can be edited, reviewed from a financial (billing) and/or clinical perspective, and deleted. This guide describes the processes of opening, editing, reviewing and deleting a visit.

Pre-conditions

To manage a new or open an existing visit, a client record must be active. 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

In addition to opening, editing, reviewing and deleting visits, their management also includes client referrals and appointment control. These two additional processes are described in other specific process guides of this series.