

Process Guideline

1.7.0

EOD Reporting & Validation Procedures

Admin staff | Clinic Managers

OpenEMR version

4.1

Last update

May 28, 2017

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Steps

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End-of-day Reports / Examples

Option

1 List of clients served



Print a list of all clients served during a specific date (e.g. today). Verify completeness.

Select: Reports > Clients > List and enter today's date BOTH in the From and To fields. Press Submit button.

Report - Client List

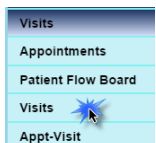
Service Provider: -- All -- Having Visits From: 2017-05-04 To: 2017-05-04 Submit Export to CSV Print

Last Visit	Client	ID	Street	City	State	Postal Code	Home Phone	Work Phone
04/05/2017	Aaron, Mary Ann	AAR-2016-06-22-02						
04/05/2017	Ackroad, RESHMA	ACK/111125/01	New Delhi					
04/05/2017	Addison, ALMA	303030	Mermaid Rd					
04/05/2017	Alassi, CAROL	9569595959	Domer					
04/05/2017	Babel, Montserrat	MBA-20090127-002						
04/05/2017	Burton, Donna	12	Moon Street	Port Of Spain		3344	224-698-511	274-558-894
Total Number of Patients : 7								

TODAY'S DATE

VERIFY FOR INCOMPLETE DATA

2 Visits by provider



Print today's list of all Visits grouped by service provider. Select Visits > Visits > Details > Refresh

Verify that all visit data were properly entered. Mark Details checkbox. Complete visit data (e.g. Unassigned provider or empty visits without services provided), and close open visits at EOD.

Note: Empty visits are those with no services or products entered in the Tally Sheet. However, these visits may have other relevant data (e.g. health history); therefore, before an authorised person deletes the visit, data must be verified and corrected if necessary.

Visits Report

Clinic: -- All -- From: 2017-05-04 To: 2017-05-04 Default Provider: -- All -- Service Provider: -- All -- Service: New Open/Empty Only Details Refresh Print Export to CSV

Default Provider	Date	Client	ID	Status	Visit	Form	Coding
Unassigned--	04/05/2017	Aaron, Mary Ann	AAR-2016-06-22-02	Closed	Pap Smear	Unknown: GYN-035, GYN-036	
Casimiro, Nurse Des	04/05/2017	Addison, ALMA	303030	Closed	Urology consultation	Casimiro, N: 257002, LC-002	
Desir, Dr. Ernest	04/05/2017	Ackroad, RESHMA	ACK/111125/01	Closed	VIA screening	Desir, D: GYN-010, GYN-018, GYN-019	
	04/05/2017	Alassi, CAROL	9569595959	Closed	Gyn visit	Desir, D: GYN-010, GYN-018, GYN-019	
	04/05/2017	Babel, Montserrat	MBA-20090127-002	Closed	Obstetric consultation	Desir, D: 252101, FH-001, FH-002, OB-010	
	04/05/2017	Addison, LINDA	303030	Open	Youth seervices		
	04/05/2017	Clarke, Ricardo	56	Open	Urology consultation	Desir, D: 257002	
DrShrotri, Laxmikant	04/05/2017	Burton, Donna	12	Closed	Prenatal checkup	DrShrotri, L: 252101, 258104, CON-044	
	04/05/2017	Amber, Gloria	2009-11-24-001	Closed	Infertility	DrShrotri, L: 258001, 258003	
	04/05/2017	Carlsile, Belinda	285233	Open	Pap smear	DrShrotri, L: 257002	

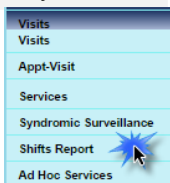
Incomplete data

Open and empty visits

Incomplete data

Note: You can filter this report by service provider, by service delivered, and by open/empty visits that need to be corrected

3 Shifts reconciliation



The Shifts Report allow clinic managers to reconcile specific services with service providers in a date range, and also show the status of shifts and visits that need to be closed or adjusted.

Select Visits > Shift Report > Details

Shifts Report

Clinic: -- All -- Service Provider: -- All -- From: 2017-05-04 To: 2017-05-04 Details Refresh Print

Shift	Service Provider	Date	Client	ID	Status	Visit	Form	Coding
Unassigned--	Desir, Dr. Ernest	04/05/2017	Addison, LINDA	303030	Empty	Youth seervices		
	DrShrotri, Laxmikant	04/05/2017	Burton, Donna	12	Closed	Prenatal checkup	DrShrotri, L: 252101, 258104, CON-044	
		04/05/2017	Amber, Gloria	2009-11-24-001	Closed	Infertility	DrShrotri, L: 258001, 258003	
		04/05/2017	Carlsile, Belinda	285233	Open	Pap smear	DrShrotri, L: 257002	
	--Unassigned-- Sub-Total							4
Afternoon	Desir, Dr. Ernest	04/05/2017	Ackroad, RESHMA	ACK/111125/01	Closed	VIA screening	Desir, D: GYN-010, GYN-035, GYN-050	
		04/05/2017	Clarke, Ricardo	56	Open	Urology consultation	Desir, D: 257002	
	Afternoon Sub-Total							2
Evening	Desir, Dr. Ernest	04/05/2017	Babel, Montserrat	MBA-20090127-002	Closed	Obstetric consultation	Desir, D: 252101, FH-001, FH-002, OB-010	
Total --								10

Incomplete data

Incomplete data

Open visit

Open visit

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Steps

Menu

Description

End-of-day Reports / Examples

4 Next appointment

Visits
Appointments
Patient Flow Board
Visits
Appt-Visit

Print appointment schedule (if clinic is using this module) for the following day, showing available times, so nurses can pull appropriate charts in advance.

In case of system or power failure the following day, a printed copy of next day appointment schedule will facilitate work flow until system can be restored.

Report - Appointments

Clinic: First Clinic I Service Provider: -- All --

From: 2017-05-05 To: 2017-05-05

Status: All Category: All

☐ Without Provider ☐ Without Facility

☒ Show Available Times

Submit Print Superbills

Service Provider	Date	Time	Client	ID	Home	Cell	Type	Status	Comment
Gynaecologist, EN	05/05/2017	08:00					Available		
	05/05/2017	08:15					Available		
	05/05/2017	08:30	CAROL Alassi	956959599			2 Re-Visit / Re-Supply	- None	
	05/05/2017	08:45					Available		
	05/05/2017	09:00	EDITH Castro	84848484			2 Re-Visit / Re-Supply	- None	

5 Sales by item

Financial
Sales
Svcs Provider Cash Rec
Svcs by Prov
Front Rec

Print today's Sales by Item. Mark Details checkbox. Reconcile with your cash and check receipts. Report any discrepancies to Clinic Manager.

Warning: This report shows total amount received, but does not specify any discounts or adjustments as the Collection Report does (next)

Sales by Item

-- All Facilities -- -- No Adjustment Filter -- ☒ Details

From: 2017-05-04 To: 2017-05-04 Refresh Export to CSV Print

Category	Item	Date	Invoice	Qty	Price	Adj	GST	Payment
Contraception	CON-022 Injectable 1 month - Follow up consultation	04/05/2017	000694	1	5.00		0.63	5.63
	Total for CON-022 Injectable 1 month - Follow up consultation			1	5.00		0.63	5.63
Non-SRH - Family Health	FH-002 FH - Urine Test (Sugar & Albumin)	04/05/2017	000690	1	20.00		20.00	
	Total for FH-002 FH - Urine Test (Sugar & Albumin)			1	20.00		20.00	
Non-SRH - Laboratory	LC-002 BUN/Urea	04/05/2017	000693	1	10.00			10.00
	Total for LC-002 BUN/Urea			1	10.00			10.00
	LC-013 Urine Acid Test	04/05/2017	000693	1	10.00			10.00
	Total for LC-013 Urine Acid Test			1	10.00			10.00
Non-SRH - Other medical	375005 Removal of Lipoma	04/05/2017	000693	1	310.00			310.00
	Total for 375005 Removal of Lipoma			1	310.00			310.00
SRH - Infertility	258001 Endometrial Biopsy	04/05/2017	000692	1	275.00			275.00

6 Collection Report

Financial
Sales
Svcs Provider Cash Rec
Rec/Inv by Pay Methods
Collection Report

Print today's Collection Report.

This report displays Charges, Adjustments, Payments, Balances due, and credit aging, so it is very helpful for the cashier to reconcile her/his cash at the End of Day.

Report - Collection Report

Displayed Columns:

☒ National ID ☐ DOB ☐ ID ☐ Policy ☒ Phone ☐ City

☐ Primary Ins ☐ Referrer ☐ Act Date ☐ Inactive Days ☒ Errors

Service Date: 2017-01-01 To: 2017-05-24 Open

Clinic: -- All Facilities --

Age By: Service Date

Aging Columns: 3 Days/Col: 30

Submit Print

Name	National ID	Phone	Invoice	Svc Date	Charge	Adjust	Paid	0-29	30-59	60+	Prv	Sel	Error
Carsile, Belinda	369874	325642255	17.2364	04/05/2017	175.00		175.00						
Clarke, Ricardo		56.2365	04/05/2017	175.00		175.00							
Client, Another	xxx	PS-0177	01/03/2017	154.25		152.50				1.75			
Guiney, JOSEPH		382.2343	29/03/2017	0.67					0.67				

Purpose

To provide a checklist of end-of-day relevant procedures

Process description

Usually at close of business every day, key administrative staff and clinic managers verify quality of data and prepare for next day operations. This process involves the generation of a few selected reports and validation checks.

Pre-conditions

Provision of services has ended and no additional financial or clinical data needs to be entered into the system.

Observations

OpenEMR provides multiple reports for revising and cross-checking data. This section focuses on administrative procedures essential to complete today's operations. Reports can be displayed onscreen or exported to comma separated value (CSV) format.