

Process Guideline

9.1.1

Basic Client Reports

Admin staff | Clinic staff

OpenEMR version

4.1

Last update

June 15, 2017

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Steps

Menu

Client List Reports / Examples

Description

Most OpenEMR reports can be

- Submitted to the screen
- Exported to comma separated value (CSV)
- Printed to paper



Client List



Report – Client List – End of day report - Onscreen

Report: List of all clients served (having visits) during a specific date (e.g. today).

Uses: End-of-day control, allows to verify completeness of data

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	Amber, Gloria	2009-11-24-001						
04/05/2017	Babel, Montserrat	MEB-20090127-002						
04/05/2017	Burton, Donna	12	Moon Street	Port Of Spain		3344	224-698-511	

Total Number of Patients : 7

TODAY'S DATE

VERIFY FOR INCOMPLETE DATA

Report – Client List – By period and service provider - CSV

Report: List of all clients served during a specific range of dates (e.g. March 1 – 31, 2017), and by a specific service provider (optional) in CSV format

Select: Reports > Clients > List and enter from 2017-03-01 to 2017-03-31. Select Service Provider. Press Export to CSV button.

Service Provider: Dr. Ernest Desir Having Visits From: 2017-03-01 To: 2017-03-31 Submit Export to CSV Print

Last Visit	First	Last name	Middle	ID	Street	City	State	Postal Code	Home Phone	Work Phone
29/03/2017	CASTILLO	JUAN		15577739						
31/03/2017	FEU	HENRY		1234567899					4464654645	
28/03/2017	FERNANDEZ	TULIA	ANA	12678909						
15/03/2017	GONZÁLEZ	ANA	CRISTINA	11890760R01						
28/03/2017	ROSAS	CARLOS		88888R01						
13/03/2017	LINARES	ROSA	BETH	3423532						
21/03/2017	PARMENTIER	MARLON		545454					545454545	
21/03/2017	PERDOMO	LUISA		555555	Las Acacias				4544455	
06/04/2017	PEREZ	MARIA	JOSEFINA	82818955						
15/03/2017	PÉREZ	MIGUEL	IGNACIO	11536754						
14/03/2017	RAMÍREZ	ANGELICA	ROMI	18.963.142						
17/03/2017	RANGEL GARCIA	PIERINA	ALEXANDRA	28307289R2						
07/03/2017	ROMERO	GLORIA		555.555.55						
07/03/2017	ROMERO	SUSANA	MARIA	109.344.12						
20/03/2017	TORO	MARIANA		22346298	Petare					

Report – Client List – Complete list – Printed to PDF

Report: List of all clients registered in OpenEMR since its inception.

Uses: Client directory. Comprehensive Client data quality validation.

Select: Reports > Clients > List and enter leave Service Providers = All, Select Not Having (visits) and select a future date to ensure Not Having visits include all clients. Press Print button.

Service Provider: -- All -- Not Having Visits From: To: Submit Export to CSV Print

Report - Client List

Last Visit	Client	ID	Street	City	State	Postal Code	Home Phone	Work Phone
27/04/2017	AARON, LAURA	AALR-75062701			01 DISTRITO CAPITAL		3456758974	
	AASTON, ADA	0188.667.3						
02/05/2017	ALVAREZ, MARYELIZ	V27027889						
	APONTE, JACKIMAR	V29738373						
03/05/2017	ARIAS, ROKYMAR	V19750654						
27/04/2017	AZUAJE, NAIROBI	V26578616						
08/04/2017	BARBOSA, EMMMA	5555551			15 MIRANDA		465465	
	BETANCOURT, IRMARIS	V17477606						
05/05/2017	BLANCO, GLENDYS	22346301			24 VARGAS		0212636	
17/04/2017	BLANCO, MAURO	3061992						
18/04/2017	CARDONA, HITSANGEL	12076877						

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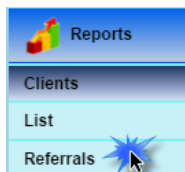
Steps

Menu

Description

Client Referral Reports / Examples

Client Referrals



Report – Client Referrals of all types in long period - Onscreen

Report: List of all clients referred both externally and internally, from all facilities during a long period

Uses: Stat cross-check, review of referral contacts, assessment of referral activity

Select: Reports > Referrals > Set Period. Press Refresh button.

Referrals									
All Types				-- All Facilities --		From: 2010-01-01	To: 2014-12-31	Refresh	Export to CSV
Refer By	Refer To (Org / Person)	Refer Date	Expected Date	Reply Date	Client	ID	Reason	Service	
Receptionist	External Lab 1 / External Lab	04/01/2011	20/01/2011		Lucinda Black	1023	General Consultation	2020: MTP Related - HIV testing	
Nurse	External Lab 1 / External Lab	01/06/2011	08/06/2011		ARIANA Ashley	30000	mamografia	10101088: test	
Nurse	External Lab 1 / External Lab	18/06/2014	30/06/2014		ROSIA Addison	301301	test	111001:	
EN Gynaecologist	hospital / hospital	10/12/2010	14/12/2010	16/12/2010	Joseph Addison	2009-04-10-02	Client requires a mammography in order to determine contraceptive method to provide	10101088: test	
Receptionist	hospital / hospital	03/01/2011	20/01/2011		Liliana Lyn	20091122001	General Consultation	2020: MTP Related - HIV testing	
John Doe	hospital / hospital	16/03/2011	18/05/2011		Casimir Caidor	009-060-897-2	Tubal Ligation	10101088: test	
Laxmikant DrShrotri	hospital / hospital	31/03/2011	08/04/2011		Josephine Addison	2009-04-10-03	2nd trimester abortion	1010: 2nd Trimester MTP - MVA	
Daniel Messer	hospital / hospital	12/07/2011	26/07/2011		EDITH Castro	300311001	visit to discuss forms	111103:	
EN Counsellor	hospital / hospital	06/06/2011	16/08/2011		Heleen Bash	2008100701	Gyn consultation - Specialized exami	10101088: test	
Dr. Ernest Desir	hospital / hospital	14/02/2012	28/02/2012		Heleen Bash	2008100701	Abortion	1010: 2nd Trimester MTP - MVA	
Test Case	LA Galaxy / David Beckham	13/01/2012	20/01/2012		JASON GOOD	9900	Testing	10101088: test	
Receptionist	LA Galaxy / David Beckham	27/01/2012	31/01/2012		CORNELIUS Guiney	CG010945	test	1010: 2nd Trimester MTP - MVA	
Laxmikant DrShrotri	LA Galaxy / David Beckham	03/02/2012	29/02/2012		TESTHER Client	cl120120107	No service provided in clinic	1010: 2nd Trimester MTP - MVA	
Daniel Messer	LA Galaxy / David Beckham	09/02/2012	23/02/2012		Josephine Addison	2009-04-10-03	unknown	2020: MTP Related - HIV	
Dr. Ernest Desir	LA Galaxy / David Beckham	15/04/2014	25/04/2014		CREOLE Client	20120315_001cli	Service not provided here.	111001:	
John Doe	LA Galaxy / David Beckham	25/06/2014	30/06/2014		CORNELIUS Guiney	CG010945	Testing	2020: MTP Related - HIV	
Dr. Ernest Desir	LA Galaxy / David Beckham	16/03/2011	16/07/2014		SUNDEEP Sahay	FPAL_1234	Situation Critical	1010: 2nd Trimester MTP - MVA	
EN Gynaecologist	LA Galaxy / David Beckham	03/07/2014	09/07/2014	09/07/2014	BARBARA Italy	20140703_202HAL	CCSPT	REF-005: LEEP	

Report – Client Referrals outbound external - CSV

Report: List of all clients referred externally only from specific clinic

Uses: Referral follow up

Select: Reports > Referrals > Set referral type Clinic & Period. Press Export to CSV

Referrals									
Outbound External				First Clinic I		From: 2010-01-01	To: 2014-12-31	Refresh	Export to CSV
Refer By	Refer To (Org / Person)	Refer Date	Expected Date	Reply Date	Client	ID	Reason	Service	
EN Gynaecologist	External Lab 1 / External Lab	14/04/2010		21/04/2010	Edith Castro	2	breast lump	255258429: Gyn	
EN Gynaecologist	External Lab 1 / External Lab	13/07/2010	14/07/2010		Lucinda Black	1023	MVA - requires blood test	2020: MTP Related - HIV	
Receptionist	External Lab 1 / External Lab	04/01/2011	20/01/2011		Lucinda Black	1023	General Consultation	2020: MTP Related - HIV	
Nurse	External Lab 1 / External Lab	01/06/2011	08/06/2011		ARIANA Ashley	30000	mamografia	10101088: test	
Nurse	External Lab 1 / External Lab	18/06/2014	30/06/2014		ROSIA Addison	301301	test	111001:	
EN Gynaecologist	hospital / hospital	10/12/2010	14/12/2010	16/12/2010	Joseph Addison	2009-04-10-02	Client requires a mammograph	10101088: test	
Receptionist	hospital / hospital	03/01/2011	20/01/2011		Liliana Lyn	20091122001	General Consultation	2020: MTP Related - HIV	
John Doe	hospital / hospital	16/03/2011	18/05/2011		Casimir Caidor	009-060-897-2	Tubal Ligation	1010: 2nd Trimester MTP - MVA	
Nurse	Schering Plough / Afanado Roberto	09/12/2010	31/12/2010		Joubert Assumpcao	98	contraceptive method wanted	REF-005: LEEP	

Report – Client Referrals of all types in short period – Printed to PDF

Report: List of all clients referred both externally and internally, from all facilities during a short period

Uses: Referral follow up

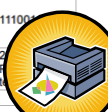
Select: Reports > Referrals > Set Period. Press Print button.

Referrals

All Types -- All Facilities -- From: 2014-01-01 To: 2014-06-30 Refresh

Export to CSV Print

Refer By	Refer To (Org / Person)	Refer Date	Expected Date	Reply Date	Client	ID	Reason	Service
Dr. Ernest Desir	LA Galaxy / David Beckham	15/04/2014	25/04/2014		CREOLE Client	20120315_001cli	Service not provided here.	111001: MTP Related - HIV
John Doe	LA Galaxy / David Beckham	25/06/2014	30/06/2014		CORNELIUS Guiney	CG010945	Testing	2020: MTP Related - HIV
Total Referrals: 6 Services: 6								



Purpose

To review basic client reports including client list and client clinic data

Process description

Producing **client reports** allow clinic managers and staff to verify data quality and completeness, review clinic activity by service provider, document client partial or total lists, and referrals.

Pre-conditions

Client data has been entered and data quality verified.

Observations

OpenEMR provides multiple reports for revising and cross-checking data. In addition to being displayed onscreen, most reports can be exported to comma-separated value (CSV) format readable with Excel, and to PDF to be stored digitally or printed in paper.