

Process Guideline

1.2.0

Finding an existing OpenEMR record

All users | Administrative | Clinic

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OpenEMR version

4.1

Last update

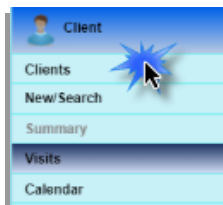
Feb 2, 2018

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Menu / Sample cases

Different types of client search / Examples

1 Finding a client in the Client List



Selecting Client > Clients displays the client list, which offers several options like Alphabetic order (by default)

Full Name	Home Phone	National ID	Date of Birth	Client ID	Home Facility	Mother's name
Aaron, Laura			02/04/1975	2009-04-10-01	First Clinic I	
Aaron, Mary Ann		AAMA800522	22/06/1980	AAR-2016-06-22-02	First Clinic I	Mary
Aaron, Rose Ann		AAR0810906	06/09/1981	AAR-2016-06-22-01	First Clinic I	Mary
Abdullah, Fatimah	604234567	880808-10-8	01/01/1978	0412008ME001	First Clinic I	
Aboab, ANTOINETTE			27/09/1978	50403	First Clinic I	
Ackroad, FRIDA			26/11/1955	ACK/111125/02		
ACKROAD, RESHMA			26/11/1977	ACK/111125/01		
Ada, DORTCH			27/11/1977	2009-04-10-01		

Alphabetic order

By selecting any column header, the list is sorted accordingly; e.g. by Client ID

Full Name	Home Phone	National ID	Date of Birth	Client ID	Home Facility	Mother's name
Pharmacy1, Pharmacy			01/01/1900	0000000	First Clinic I	
Espinoza, CHELO			01/01/1975	00000000000	First Clinic I	
TEST123	3232		03/07/1992	000000021	First Clinic I	
TEST123	3232		03/07/1992	000000022	First Clinic I	
Client, TEST	2121		03/07/1992	000000023		
Esperanza, Ana			09/09/0000	000333		
PEREZ, ELENA			10/07/1981	001122		

Client ID order

Important note:

All the data in these Process Guides are examples taken from a test server.

No data refers to real people.

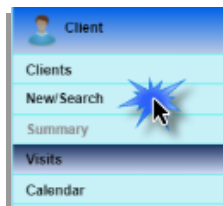
Specific searches can be done by entering the relevant data element (e.g. last name) in the global search box (i.e. all columns), or in a specific column search box.

Full Name	Home Phone	National ID	Date of Birth	Client ID	Home Facility	Mother's name
Aaron, Laura			02/04/1975	2009-04-10-01	First Clinic I	
Aaron, Rose Ann		AAR0810906	06/09/1981	AAR-2016-06-22-01	First Clinic I	Mary
Aaron, Mary Ann		AAMA800522	22/06/1980	AAR-2016-06-22-02	First Clinic I	Mary

Specific data element

Full Name	Home Phone	National ID	Date of Birth	Client ID	Home Facility	Mother's name
Aaron, Laura			02/04/1975	2009-04-10-01	First Clinic I	
Aaron, Rose Ann		AAR0810906	06/09/1981	AAR-2016-06-22-01	First Clinic I	Mary
Aaron, Mary Ann		AAMA800522	22/06/1980	AAR-2016-06-22-02	First Clinic I	Mary

2 Using Socio-demographic search fields



Any field in the Intake Form sections (Registration, Contact, Socio-demographic, Choices) can be selected.

Some fields are displayed in the search table: Name, Phone, Social Security #, Date of Birth, Identification, Home Facility, Registration Date, Sex and Address

Search or Add Client

☒ Registration Form

Home Facility: First Clinic I Client ID: 2014-04-03

National ID: Registration Date: 2014-04-03

First Name: Middle: Last Name: Sex: Female

Mother's Name: Gender: Female

Price Level: Unassigned Referral Source: Unassigned

Insurer: Unassigned

☐ Contact ☐ Socio-Demographic ☐ Choices

Name	Phone	SS	DOB	ID	Home Facility	Registration Date	Sex	Address
Rana, LAILA			04/04/1990	lai/04042014/001	First Clinic I	03/04/2014	Female	Jhapa
Rana, PRAMILA			04/03/1989	pra/03042014/002	First Clinic I	03/04/2014	Female	Pulchowk
Thapa, RAMA			04/03/1991	ram/03042014/001	First Clinic I	03/04/2014	Female	Jawalke
Thapa, SAI			04/03/1991	sa/03042012/008	First Clinic I	03/04/2014	Female	Patan
Jane, JANE			04/07/1993	20140403_202JAN	First Clinic I	03/04/2014	Female	
Mary, MARY			04/01/1991	20140403_201MAR	First Clinic I	03/04/2014	Female	
Rajbhandari, SARNAM			04/03/1990	sar/03042014/004	First Clinic I	03/04/2014	Female	Jhapa

Example: Selecting a specific Registration Date (shown in search table)

Note: the Search button in the client intake (registration) form depends on configuration parameters. If you do not see it, use other search methods described here or consult your system administrator

While other fields are not shown in the search table, they can also be used for searching purposes (e.g. Divorced clients).

Note that, in order to search for a specific field content, all other fields must be 'Unassigned'

Search or Add Client

☐ Registration Form ☐ Contact ☒ Socio-Demographic

Race: Unassigned Caste: Unassigned

Language: Unassigned Civil Status: Divorced

Religion: Unassigned Occupation: Unassigned

☐ Choices

Name	DOB	ID	Home Facility	Registration Date	Sex	Address
Chiellini, James	00/00/0000	JC001	First Clinic I	01/07/2010	Male	45 Astoroute De Delmas
Hirleman, Nicolette	01/05/1970	24	First Clinic I		Female	
Smith, Jennifer	05/31/1974	26	First Clinic I	01/01/2001	Female	
Brouce, Maria	06/09/1998	63	First Clinic I	23/11/2008	Female	

Example: Selecting a specific Civil Status (NOT shown in search table, but verified below)

Smith, Jennifer

History | Report | Documents | Transactions | Issues

Demographics (collapse) Print Record

Registration Form Contact Socio_Demographic Choices

Race: Caucasian Caste: Unassigned

Language: Unassigned Civil Status: Divorced

Religion: Unassigned Occupation: Unassigned

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Different types of search / Examples

[Help]		[X] All Facilities					
Name	Phone	SS	DOB	ID	Home Facility	Registration Date	Sex
Aaron, Rose	AAR0816936	09/06/1981	AAR-2018-08-22-01		First Clinic I	22/08/2016	Female
Aaron, Mary	AAM080922	08/12/1980	AAR-2018-08-22-02		First Clinic I	22/08/2016	Female

Purpose	To facilitate location of existing client records
Process description	Location of existing client records is key for an efficient workflow through the visit cycle and to avoid record duplication. The same mechanism used to avoid client record duplication can be used for an Advanced Search during client record creation.
Pre-conditions	When designing the client/patient intake or registration form, selected fields can be marked to facilitate search of existing client records. These fields will work as filters.
Observations	OpenEMR provides three main mechanisms to find existing clients: 1) Client List, 2) Demographic search fields, and 3) Search engines. This process guideline presents all three.