Process Guideline	1.1.0	Creating a NEW OpenEMR Record	All users	Administrative	Clinic
OpenEMR version	4.1	Last update	May 17, 2017	Author(s): X Gonzalez
Steps		**Menu**	**Data Elements / Sample screenshots of user-defined forms**	

1 Display new record form

2 Fill & save registration form

Note: Red-lighted fields are mandatory

3 Create client record

 Expansible & collapsible sections

4 Enter additional data

Note: Data entry forms are customisable.

After filling out the top Registration section, you can save it to create the new client/ patient record.

Additional data can be added at anytime later

5 Verify active client

Note: See PG 1-1-1 Creating a non-duplicate new OpenEMR record to better understand the client/patient record creation process

Purpose	To create a new client record for a new or old client in OpenEMR
Process description	Previously existing client records (paper or electronic), along with new client records, will have to be progressively created into OpenEMR database. This guide describes the five steps to create client/patient records
Pre-conditions	Before creating a new client record, you must ensure that a record has not been created previously for the same person (i.e. with the same or different name). OpenEMR will assist you in finding records with same or similar profile data.
Observations	The term 'new (digital) OpenEMR record' should not be confused with 'new client to the clinic' or 'new user of FP'. A unique new client **record** is created the first time a new or old client is registered into OpenEMR.

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Glossary for Creating a NEW OpenEMR Record

Note: The following data elements are examples only. OpenEMR forms are customisable.

Select checkbox to expand/collapse section

☑ **REGISTRATION DATA**

2 Fill & save registration form

- Home Facility: Clinic or Service Delivery Point (SDP)
- Client ID: User-defined structured client code (E.G. **AAA-YYYY-MM-DD/NNN**)
- National ID: Key national ID code (eg. social security)
- Registration Date: Today for new clients| Previous date for subsequent
- Name: First name| Middle name | Last Name
- Mother`s Name: In some countries, this field is used to confirm identity
- Sex: Female | Male | Unassigned
- DOB: Date of birth | DD/MM/YY
- Referral Source: How the client knew about the clinic

4 Enter additional data

☑ **CONTACT DATA**

- Address: Street / Number
- City: City, town, village
- Province/County or Parish: State, Department, Province, District, County or Parish
- Country: Country ISO name
- Postal Code: Postal or Zip Code
- Home Phone: Country code – City Code - Number
- Mobile Phone: Country code – City Code - Number
- Work Phone: Country code – City Code - Number
- Contact email: Valid email address format

☑ **SOCIO-DEMOGRAPHIC DATA** (Usually based on predefined lists displayed in drop-down menus)

- Race: Genetic classification of human groups in country
- Caste: Some countries consider this social stratification important
- Language: Official widespread language in country
- Civil Status: Married, union, single, widow
- Religion: Major religions in country (Not all countries consider this relevant)
- Occupation: Locally-defined set of professional and non-professional activities

☑ **CHOICES / PREFERENCES / OTHER DATA**

Allow Mail Message?:   This question shows how any data element relevant to the organization can be included as a user-defined variable. In this case, protection of users' safety is taken into account by