



# Users Guide

Based on Version 4.1

Documentation provided by

**Medical Information Integration, LLC**  
<http://www.mi-squared.com>

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# GETTING STARTED

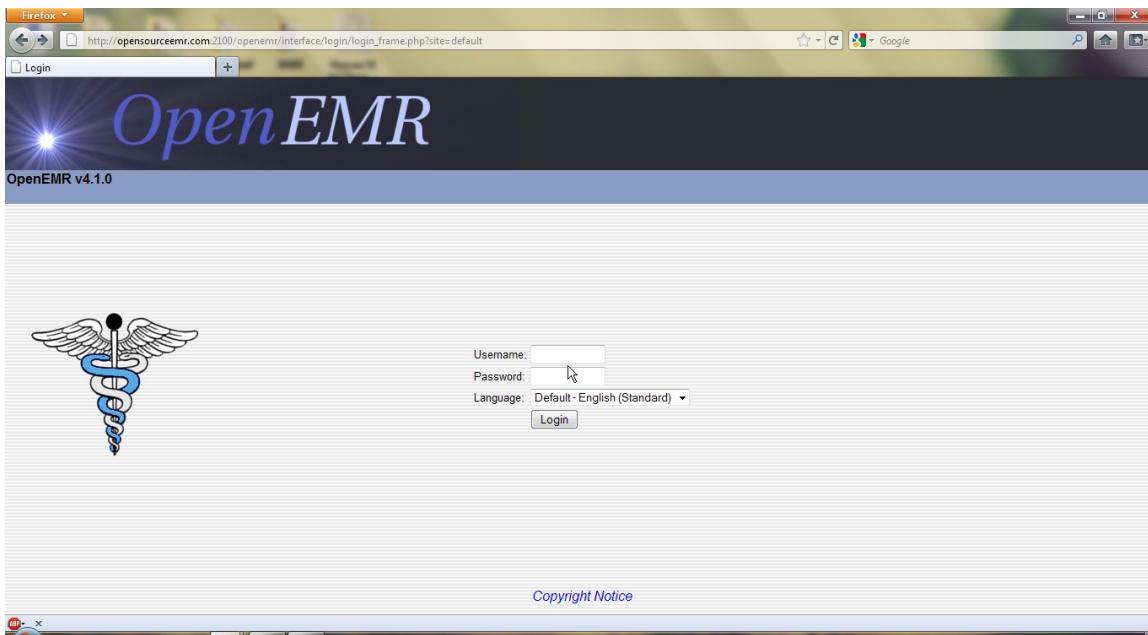
## Getting to the Login Page

In your browser's address bar you will need to enter the location of your OpenEMR installation. For most users this address will consist of the name of your server followed by a forward leaning slash, "openemr" and another forward leaning slash. This should look like this:

http://MyServerName/openemr/

Be sure to check with your Administrator, as the location of your OpenEMR installation may be different. As an example the OpenEMR live demo is located at: <http://opensourceemr.com:2100/openemr/>

Once you have entered the correct address, you should be presented with the login screen:



## Logging In

The login screen contains two input boxes: 'Username' and 'Password'. The first time you log in to a fresh installation of OpenEMR you will need to log in as "admin" with a password of "pass". Your administrator may provide you with your own username and password. *Note that the OpenEMR login is case-sensitive.*

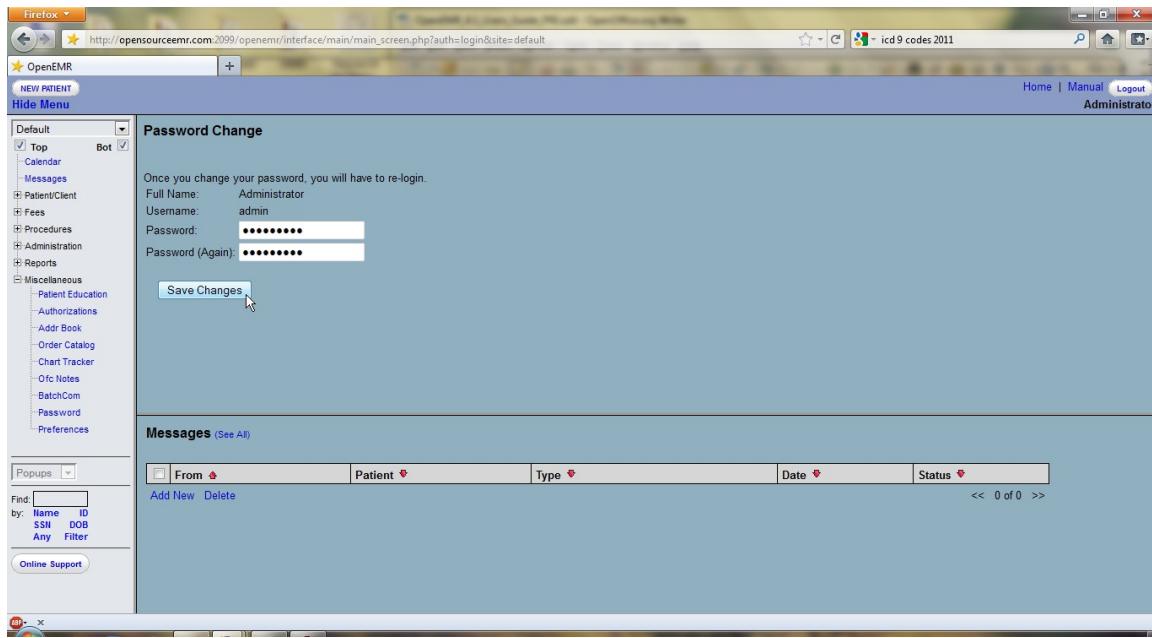
You will also be presented with a drop-down list of possible languages in which you can view OpenEMR. The default language (English) should already be selected.

Once you have entered the correct username and password, simply click the 'Login' button or press 'Enter'.

## Changing Passwords

If this is your first time logging in to OpenEMR it is recommended that you change your password to something more secure. To do this select 'Miscellaneous - Password' from the navigation list on the left, or simply 'Password' in the Radio Button navigation scheme.

This will bring up the Password Change screen. Enter your new password into the two input boxes, make sure you type the same thing into each box. And remember that OpenEMR's username and passwords are case sensitive.

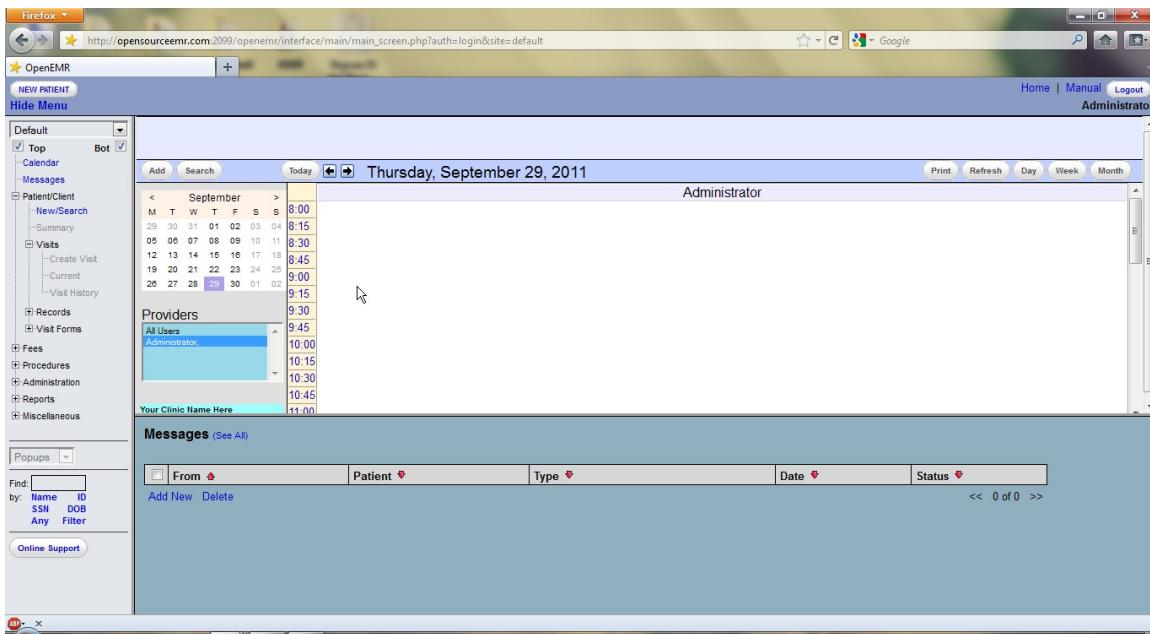


Once you've done this, click the 'Save Changes' button. You will then be required to login again with your new password.

**Note: If you are using the OpenEMR demo instance, please do NOT change the admin password!**

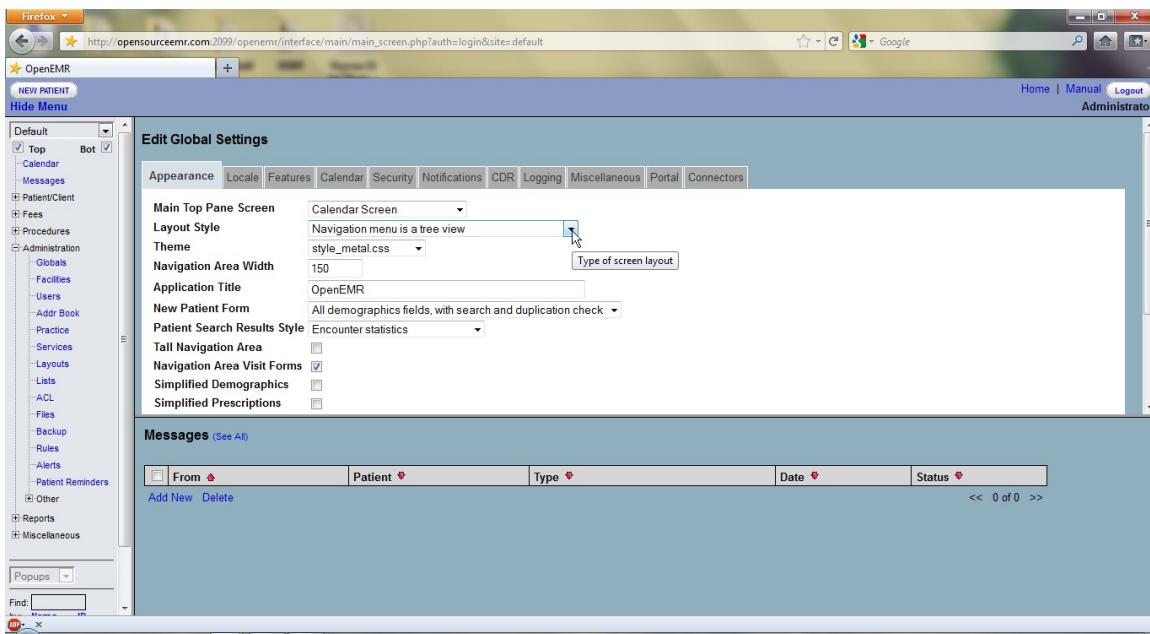
## MAIN SCREEN & NAVIGATION

A successful login will bring you to the main screen of OpenEMR. The user is presented with two windows, the Calendar, and below that, the Messages page.

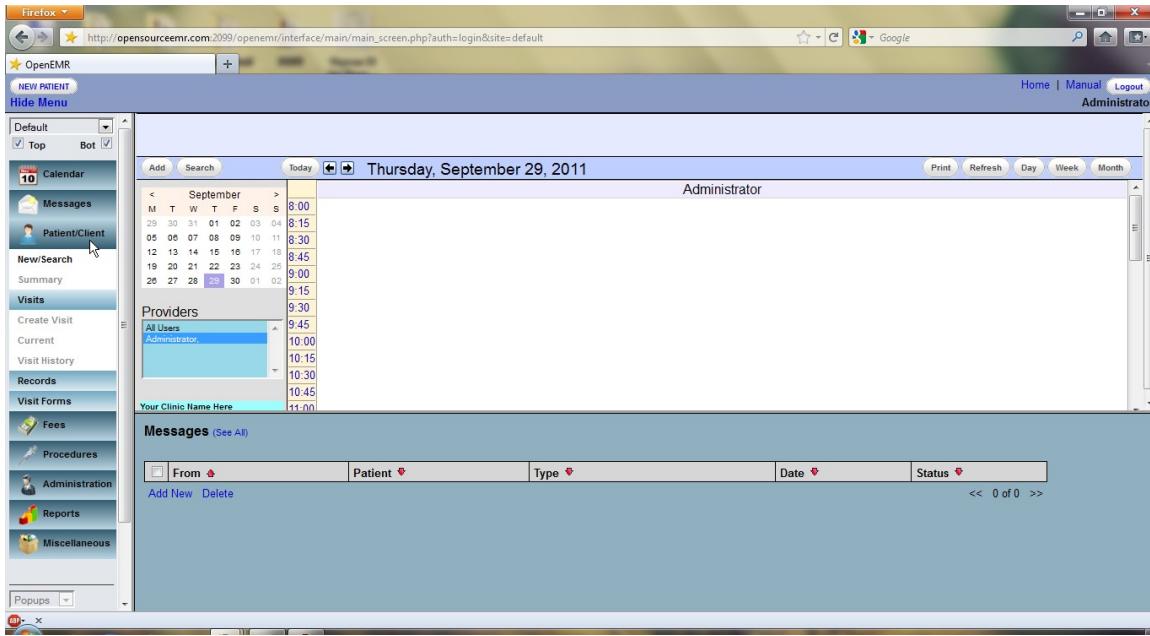


## Navigation

OpenEMR can be configured with your choice of three navigation schemes. Sliding Menu, Tree View, or Radio Buttons. You can specify which scheme you would like to use by going to 'Administration - Globals' and selecting the desired navigation scheme from the 'Layout Style' drop down list.



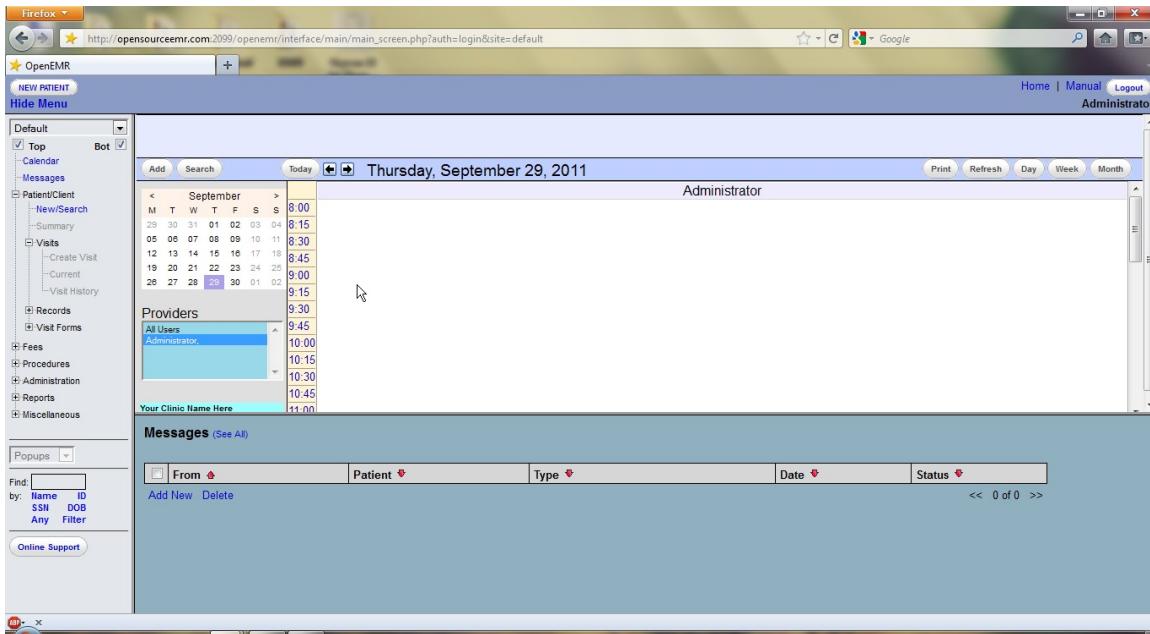
## Sliding Menu



The Sliding Menu option is the default navigation scheme for OpenEMR 4.1. This expanding menu-style navigation scheme presents a hierarchical list of page links on the left side of the screen which can be directed to load in either the top or bottom widow of the main screen.

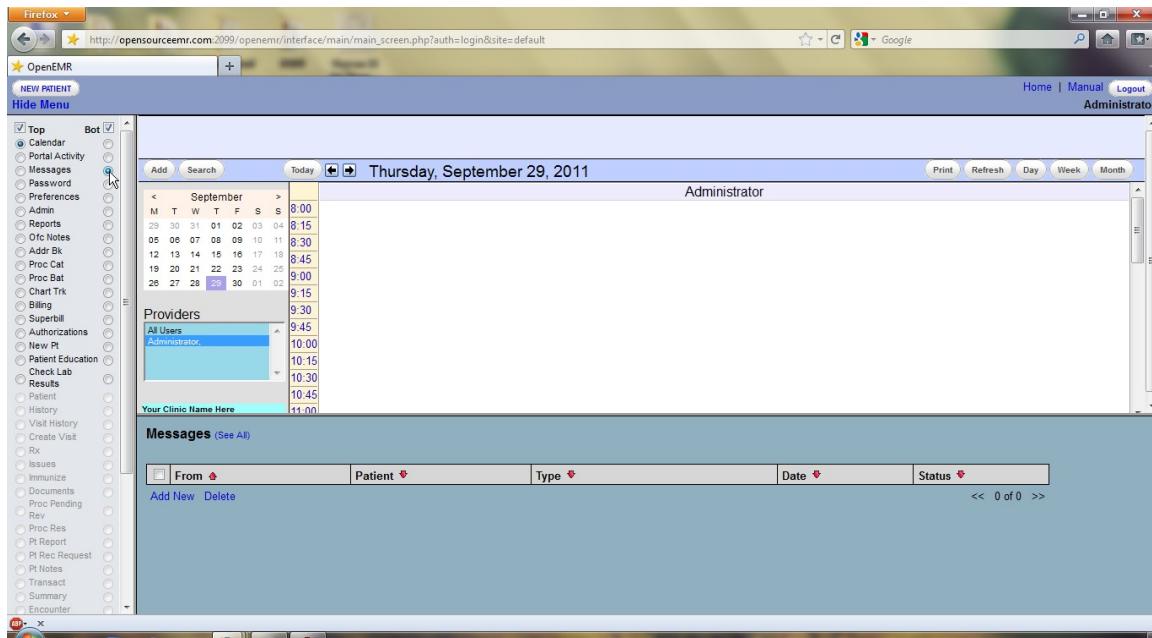
The patient search function is located below the navigation list on the left hand side of the screen, along with a link to OpenEMR's support page on Sourceforge.net.

## Tree View



The Tree View navigation scheme presents the same hierarchical navigation list as the Sliding Menu, but without the icons & menu-button styling.

## Radio Buttons



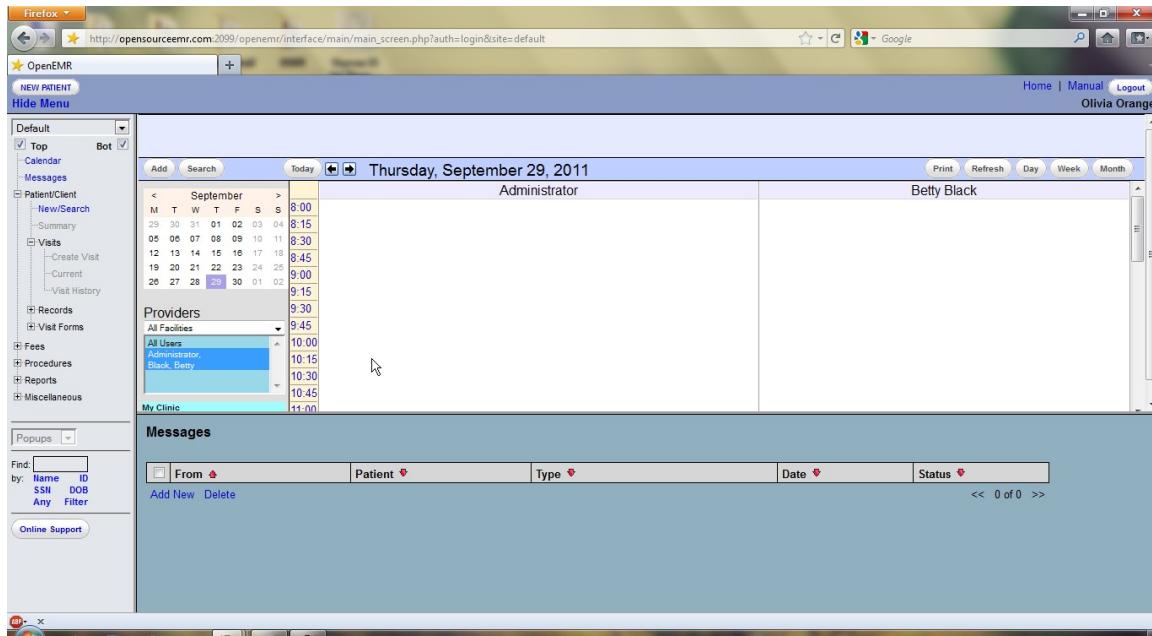
The Radio Button navigation scheme functions similar to the Tree View except that the links are presented as an unordered list, with a series of radio buttons to the right and left of each item.

Selecting the left radio button will load the desired page in the top window, while selecting the right hand button will load the page in the bottom window. You can also disable the top or bottom window by clicking on the appropriate checkbox at the top of the navigation menu (this function is available on all navigation schemes).

For the purpose of this Users Guide we will assume you are using the Tree View navigation scheme. A complete cross reference of menu items for both the Radio Button and the Tree View/Sliding Menu navigation schemes can be found [here](#).

## SETTING UP YOUR CLINIC

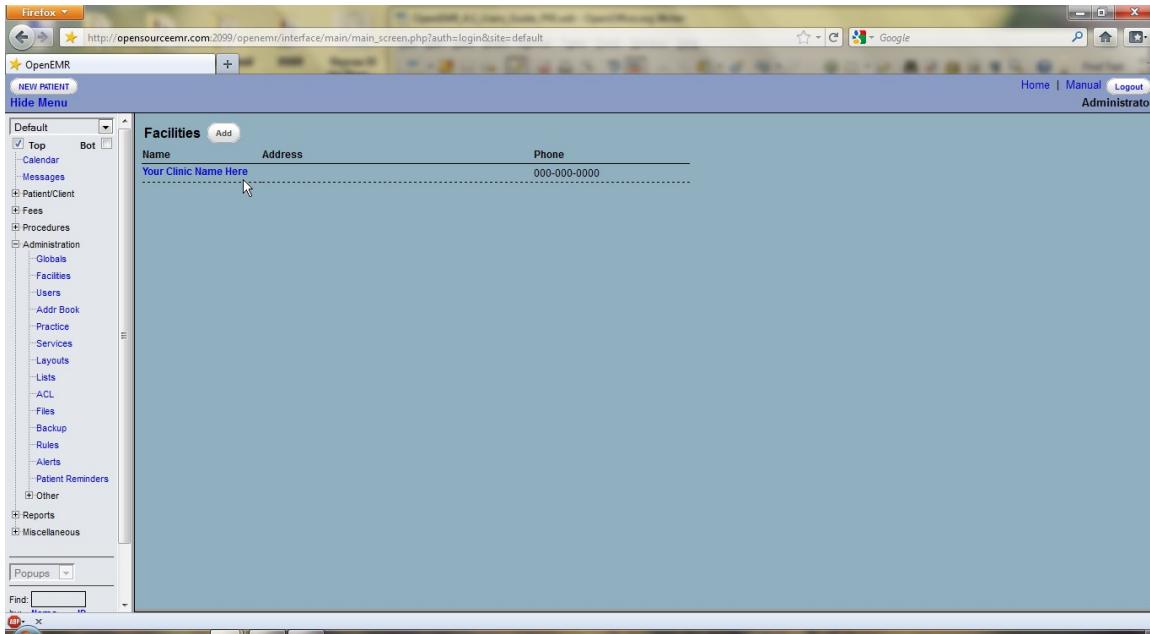
To begin using OpenEMR, navigate to your server's installation directory and log in using your assigned username and password.



A successful login brings you to the appointment calendar. Before you begin scheduling appointments you'll want to configure some basic information for your users. To start setting up your clinic, select 'Administration' from the navigation list on the left of the screen. This will bring up a list of available administration pages. Click 'Facilities' to bring up the Facility Administration page.

This is one of several pages within the Administration section of OpenEMR. Administration also includes sections for managing your facility's Forms, Practice information, Calendar categories, Lists, Database administration, and more. Links to these sections can be found in the left hand navigation list under 'Administration' (or at the top of the page if you're using the Radio Button navigation scheme).

## Facility Administration



We'll start by setting up your facility for your users. There is a default clinic already built in. It will need to be updated with the correct information for your clinic. To do this, simply click on the name of the clinic, in this case "Your Clinic Name Here", to edit it's details.

This pops up a lightbox containing a form for editing your clinic's information.

A screenshot of a "Edit Facility" lightbox. The form has two columns. The left column contains fields: Name (My Clinic), Address (123 SW Main St), City (Portland), State (OR), Country (USA), Billing Location (checked), Service Location (checked), Primary Business (checked), Entity (checkbox), Color (#99FFFF), POS Code (49: Independent Clinic), Billing Attn (Gary Green), and CLIA Number (123456). The right column contains fields: Phone as (000) 000-0000 (503-123-4567), Fax as (000) 000-0000 (503-123-4568), Zip Code (97219), Tax ID (EIN 111002), Facility NPI (122333), and Accepts Assignment (only if billing location) (checkbox checked). At the top right of the lightbox are "Save" and "Cancel" buttons.

Enter the correct name, address & contact information for your clinic. This information will be used for billing, so make sure to include who to direct billing information to, and enter your facility's NPI and CLIA number. Indicate whether your facility is a billing and/or service location by clicking the checkbox next to the appropriate option. If your clinic is a billing location, you may also want to check the 'Accepts Assignment' box.

When you are finished entering your clinic's information click the 'Save' button to update your clinic and return to the Facility Administration page.

Your clinic may have additional facilities in which care is given, such as a hospital. To create a new facility, click 'Add' and enter the relevant data as you did for the other clinic. OpenEMR also provides you with the option of designating a color for each of your facilities, which will then be used in the calendar view to distinguish between appointments made at the different facilities. Enter a hexadecimal code in the 'Color' field, or click 'Pick' to select a color from the pop up menu. Click 'Save' when finished.



## User Administration

Clicking 'Users' in the navigation list will bring you to the User / Groups Administration page. This page contains a list of your clinic's users. If you have not yet added any users, then only "admin" will be shown.

Username	Real Name	Additional Info	Authorized?
admin	Administrator		yes

You can add a new user by clicking the 'Add User' button, or you can modify an existing user by clicking on their username.

Both methods will pop up a lightbox containing the user profile page. Here you can edit a user's Password, Facility information and Access Control, as well as their authorization status. Authorized users are practitioners, and will appear in the appointment calendar. They can also be associated with encounters for billing purposes, and are able to authorize encounter information entered by non-authorized users so that the encounter will be billable.

To authorize your practitioners be sure to click the 'Provider' check box. Other facility staff do not need to be authorized. Practitioners will also need their UPIN and Federal Tax ID entered for correct billing, as well as their Federal Drug ID for prescription writing.

Once your user's information has been updated successfully click 'Save' to return to the User / Groups Administration page.

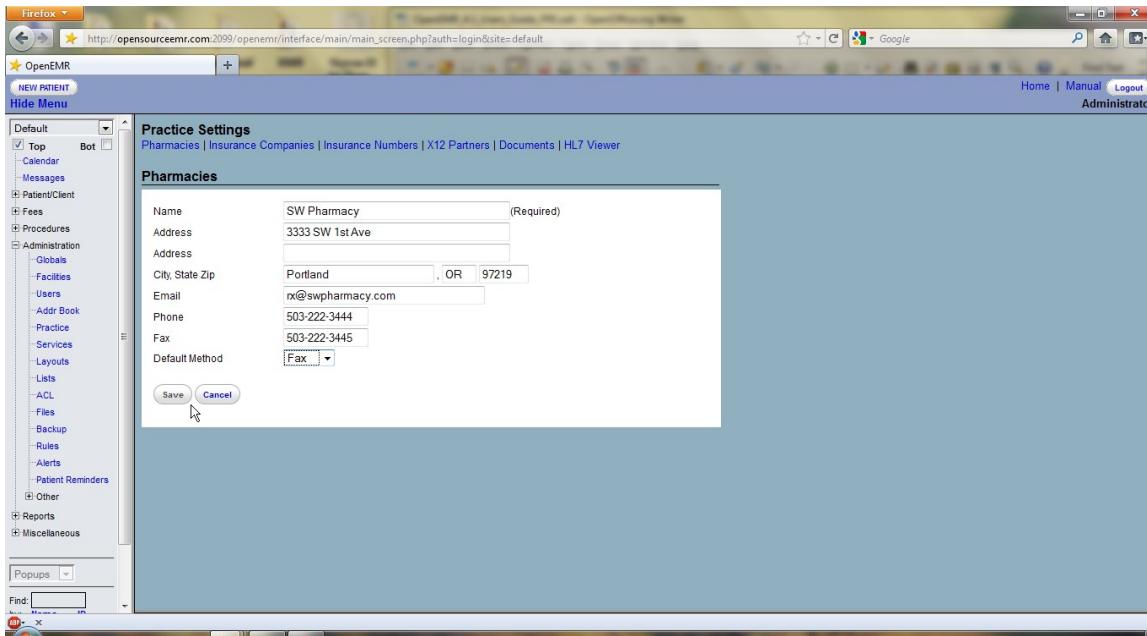
## Practice Administration

Next you'll need to enter the relevant practice information for your clinic. This includes pharmacy and insurance company information, as well as the types of documents your clinic accepts.

Clicking the 'Practice' link in the navigation menu will bring you to the Practice Administration page where you will be presented with a list of links for editing your facilities' information.

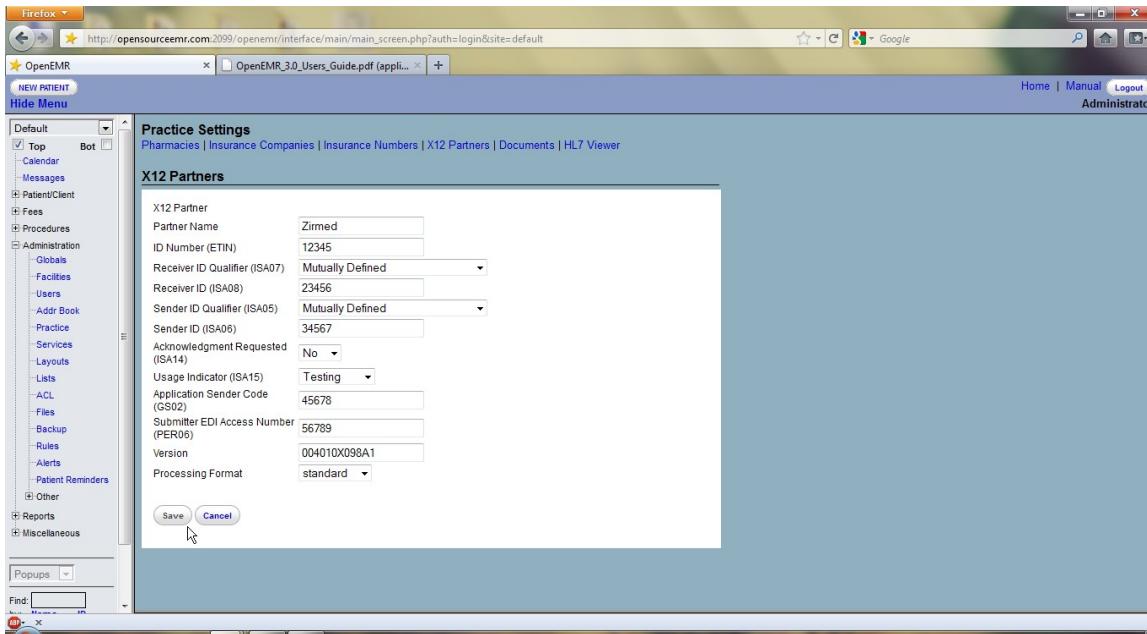
The Practice Administration page initially presents you with the list of your clinics pharmacies. Click the 'Add a Pharmacy' button to enter the contact information for your clinic's pharmacy. A drop down menu lets you

select the preferred method for transferring prescription information. Once you've entered the correct information, click 'Save' to add your new pharmacy.



Before setting up any insurance companies, you'll want to enter your X12 Partner information. These are the clearinghouses or large payers to whom you will send electronic billing. Most practices will probably just use a single clearinghouse.

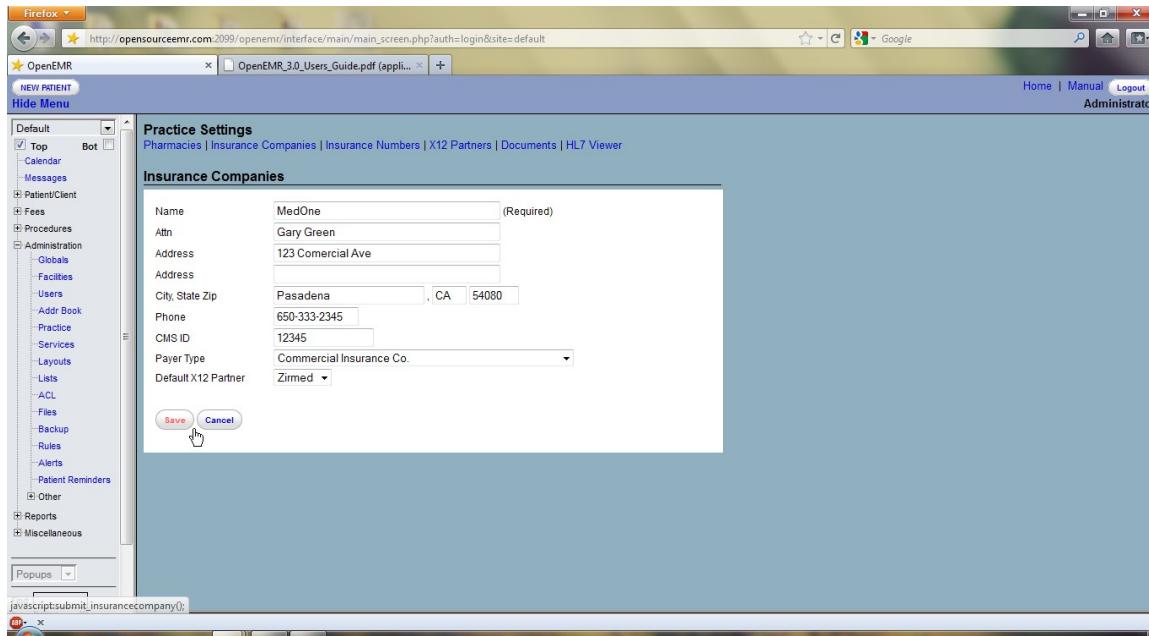
To add one of these clearinghouses, click on 'X12 Partners' and then click the 'Add New Partner' button.



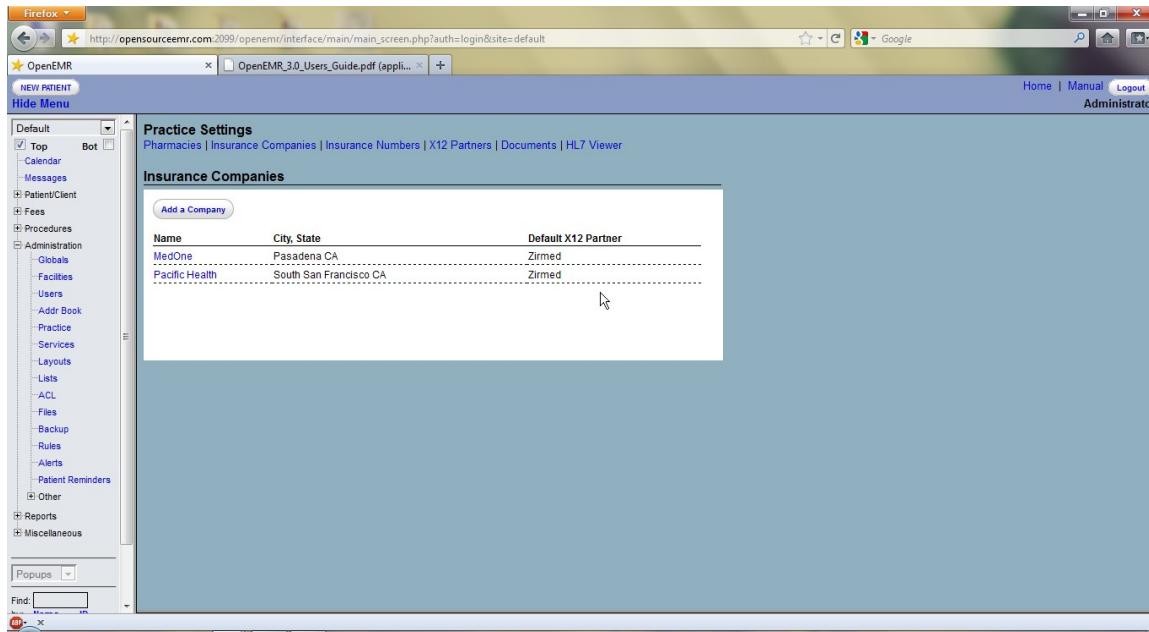
The ID numbers that you enter here will need to be provided to you by the clearinghouse/partner. The 'Version' number refers to the version of the X12 837p protocol specification used and should probably not be changed. Click 'Save' to save the information you've entered.

Selecting 'Insurance Companies' from the links at the top of the page brings up a list of companies that have been added to your clinic. If this is a new installation of OpenEMR, this list will be empty. You can add a new

insurance company by clicking 'Add a Company'. Or, you can edit an existing company by clicking on its name in the list.



Once you have entered the correct information, click 'Save' to save any changes, or add the new company to the list.



In practice, many insurance companies have multiple insurance plans with a separate billing address for each plan. At this time, you will need to add each plan as a separate insurance company.

Many insurance companies also assign their own doctor-specific ID numbers, and these numbers must appear in your claims. Click on 'Insurance Numbers' to see a list of your clinic's providers and their default ID numbers.

Name	Provider #	Rendering #	Group #
Administrator	Default		
Betty Black	Default		

Click on a provider's name to bring up a list of insurance companies and the corresponding ID numbers that have been entered for that provider.

Selecting 'Add New' presents a form for adding this provider's numbers for another insurance company. Fill in this information and click the 'Save' button to add the new number. You can also edit an existing set of numbers by clicking on the company name in the list.

Company Name	Provider Number	Rendering Provider Number	Group Number
Betty Black	22334	Unspecified	Unspecified

Add Provider Number

Insurance Company: MedOne

Provider Number: 22334

Provider Number (Type): Unspecified

Rendering Provider Number: Unspecified

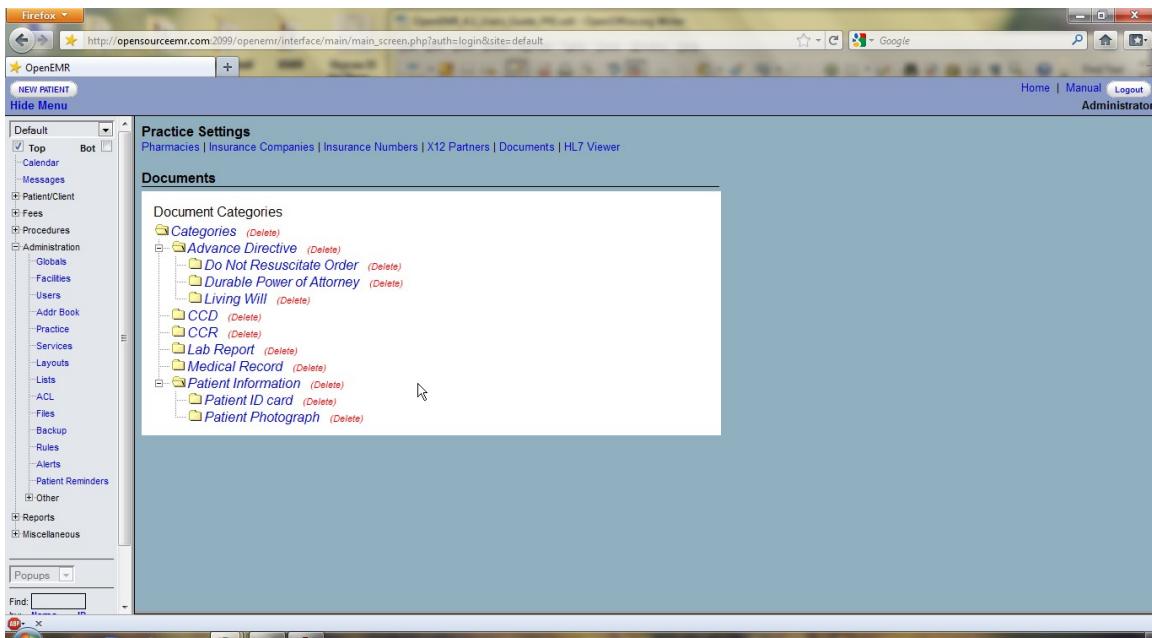
Rendering Provider Number (Type): Unspecified

Group Number: Unspecified

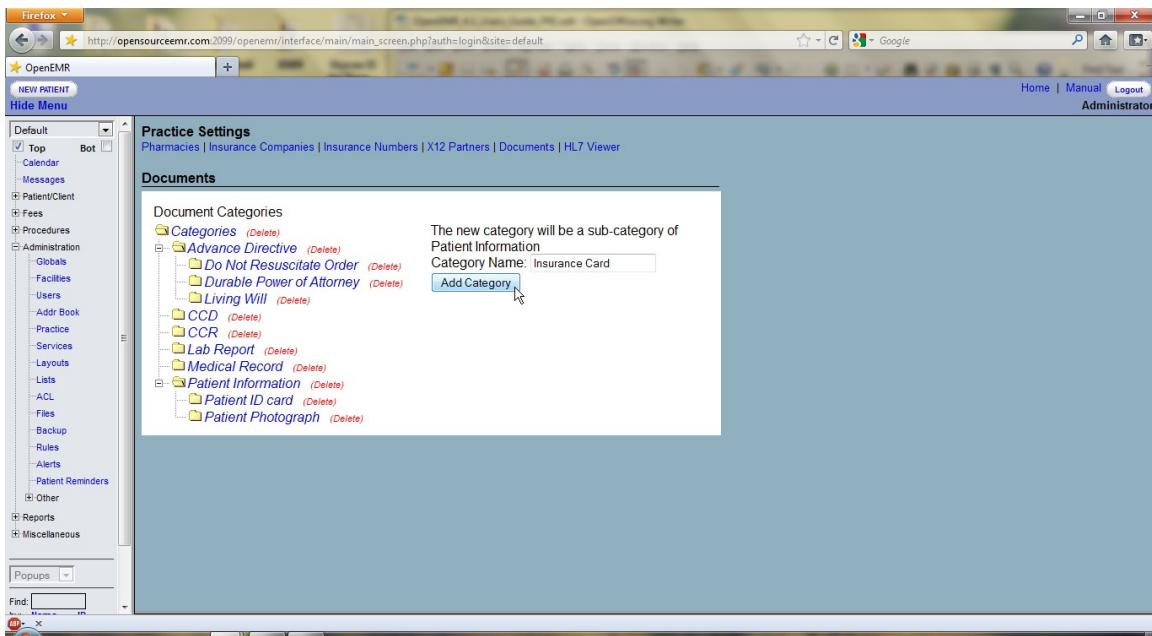
**Save**   **Cancel**

Note that one of the selections in the drop down list of insurance companies is "Default"; you can use this to fill in default numbers for insurance companies not otherwise entered.

Next click on 'Documents' to see a list of patient documents that have been uploaded. Clicking the 'Edit Categories' button displays a hierarchy of the different types of documents that you can attach to a patient. The default set is shown.



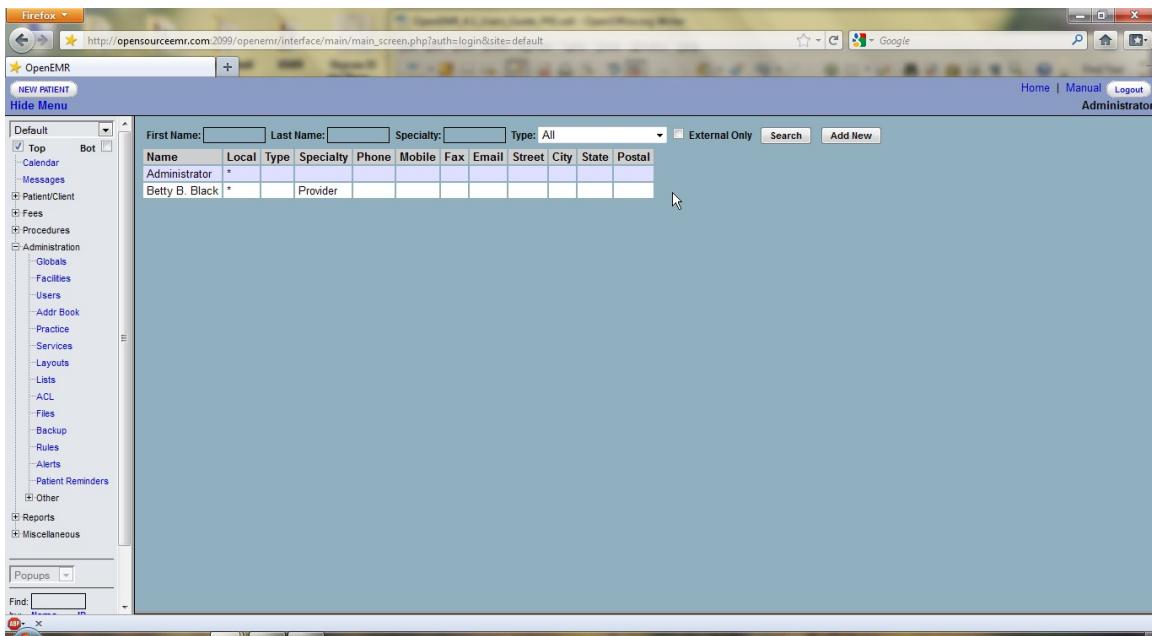
To add more categories click on the desired parent folder's name, fill in the name of the new document type, and click 'Add Category'.



## Address Book

OpenEMR also contains a built-in address book for storing useful contact information for your staff as well as other doctors, clinics, etc. that your office may contact on a regular basis.

Select 'Addr Book' (under 'Miscellaneous') from the navigation menu to bring up your clinic's Address Book.



This will present you with a list of all of the contacts currently contained in your Address Book. Click on a person's name to edit their contact information, or click 'Add New' to enter a new contact into your address book.

Add New Person - Mozilla Firefox

[http://opensourceemr.com:2099/openemr/interface/usergroup/addrbook\\_edit.php?type=1](http://opensourceemr.com:2099/openemr/interface/usergroup/addrbook_edit.php?type=1)

Type:	Specialist		
Name:	Dr. Cyan	First: Cindy	Middle: C.
Specialty:	Dermatology		
Organization:	Universal Health Center		
Valedictory:			
Home Phone:	Mobile:		
Work Phone:	503.222-3344	2nd:	Fax: 503-222-3345
Assistant:			
Email:			
Website:			
Main Address:	4456 SE Washington St		
City:	Portland	State/county:	OR
Alt Address:			
City:	State/county:	Postal code:	
UPIN:	U78901	NPI:	TIN: Taxonomy: 207QD0000X
Notes:			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

In the Add New Person dialog box, select a type, and enter their name and address. If you are adding a physician to your address book, be sure to include their UPIN and other ID numbers for billing and referrals. Entering a 'Specialty' will allow you to narrow your search parameters when writing letters to a particular physician, etc.

When you are finished entering the new contact information, click 'Save'.

Note that the new contact has been added to the list.

A screenshot of a Firefox browser window showing the OpenEMR interface. The URL is [http://opensourceemr.com:2099/openemr/interface/main/main\\_screen.php?auth=login&site=default](http://opensourceemr.com:2099/openemr/interface/main/main_screen.php?auth=login&site=default). The page title is "OpenEMR". The main content area shows a search results table for contacts. The search criteria at the top are: First Name: Cyan, Last Name: Cyan, Specialty: All, Type: All, External Only checked, and Search button highlighted. The table has columns: Name, Local, Type, Specialty, Phone, Mobile, Fax, Email, Street, City, State, Postal. The results show two entries: Betty B. Black (Provider) and Cindy C. Cyan (Specialist). The Cindy C. Cyan row is selected.

Name	Local	Type	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Administrator	*										
Betty B. Black	*	Provider									
Cindy C. Cyan		Specialist	Dermatology	503-222-3344	503-222-3345			4456 SE Washington St	Portland	OR	97215

You can search for a particular contact in the address book by entering their name and/or specialty at the top of the page and clicking 'Search'. This brings up a list of any contacts matching your search parameters.

A screenshot of a Firefox browser window showing the OpenEMR interface. The URL is [http://opensourceemr.com:2099/openemr/interface/main/main\\_screen.php?auth=login&site=default](http://opensourceemr.com:2099/openemr/interface/main/main_screen.php?auth=login&site=default). The page title is "OpenEMR". The main content area shows a contact detail view for Cindy C. Cyan. The search criteria at the top are: First Name: Cyan, Last Name: Cyan, Specialty: All, Type: All, External Only checked, and Search button highlighted. The table has columns: Name, Local, Type, Specialty, Phone, Mobile, Fax, Email, Street, City, State, Postal. The row for Cindy C. Cyan is selected. A context menu is open over the row, with the option "Edit Cindy C. Cyan" highlighted.

Name	Local	Type	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Cindy C. Cyan		Specialist	Dermatology	503-222-3344	503-222-3345			4456 SE Washington St	Portland	OR	97215

## ADDING A NEW PATIENT

Once you have entered all the necessary clinic information you can begin entering patient data.

Select 'Patient/Client – New/Search' in the navigation menu on the left of the screen to begin entering a new patient into the system.

### Patient Demographics

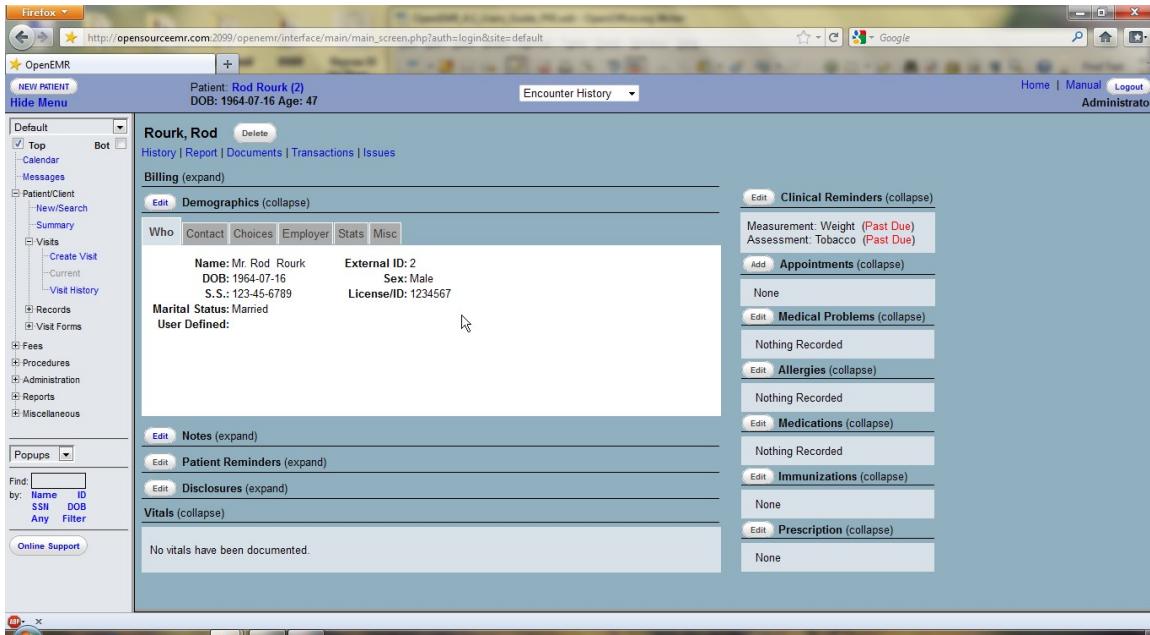
The screenshot shows the 'Search or Add Patient' page in the OpenEMR interface. The 'Who' section is active, displaying fields for Name (Mr. Rod Rourk), DOB (1964-07-16), Sex (Male), S.S. (123-45-6789), Marital Status (Married), and External ID (1234567). Below these fields is a list of checkboxes for Contact, Choices, Employer, Stats, Misc, and Insurance. At the bottom right are 'Search' and 'Create New Patient' buttons. The left sidebar shows the navigation menu with 'Patient/Client - New/Search' selected. The status bar at the bottom indicates 'Administrator'.

In the Search or Add Patient page enter the patient's name & birth date. If you have an existing chart for this patient, you may enter the chart number under 'External ID'. If you do not enter a number the system will automatically assign one that is equal to its internal patient ID. When you are finished click 'Create New Patient'.

The screenshot shows the 'Search or Add Patient' page with the date picker open for the DOB field. The calendar displays September 2011, with the date 1964-07-16 highlighted. Other dates are shown in red. The left sidebar shows the navigation menu with 'Patient/Client - New/Search' selected. The status bar at the bottom indicates 'Administrator'.

**NOTE:** Clicking the calendar button next to the 'DOB' field will pop up an easy to use date selection tool found throughout the OpenEMR program. Simply click the arrows to the right or left of 'Today' to advance the date forward or back a single month or year, or hold an arrow down to select the month or year manually. Selecting the day of the month will then fill the selected date into its respective field in the proper format (YYYY-MM-DD)

You should now be presented with the Patient Summary Page, which contains a summary of the patient's identifying information, including employment, insurance and provider information in sections that may be expanded or collapsed at will by clicking the link to the right of the desired section. The page also includes links to the patient's medical history, documents, etc. at the top of the screen, as well as a list of "issues" associated with that patient, and any appointments they may have scheduled in a column along the righthand side.



Notice that additional patient related pages are now accessible via the navigation menu to the left.

To continue entering patient information click 'Edit' next to the desired section.

This will bring up a series of tabs containing inputs for the various types of patient data. Click on the tab for the section you would like to work with and fill in the desired fields. Note that fields labeled in red are required in order for billing to work properly.

To enter a patient's insurance information for the first time click 'edit' next to the Demographics section. The Insurance information section can be found below the Demographics tabs.

The screenshot shows the OpenEMR software interface. In the top right corner, it says "Patient: Rod Rourk (2)", "DOB: 1964-07-16 Age: 47", and "Encounter History". On the right side, there are links for "Home | Manual Logout Administrator". The left sidebar has a "New Patient" button and a "Hide Menu" button. The main content area displays patient information: Name: Mr. Rod Rourk, External ID: 2, DOB: 1964-07-16, Sex: Male, S.S.: 123-45-6789, License/ID: 1234567. Below this, Marital Status is listed as "Married". Under the "Insurance" section, tabs for "Primary", "Secondary", and "Tertiary" are shown. The "Primary Insurance Provider" field has a dropdown menu with "Search/Add" and "Unassigned" options. Other fields include Plan Name, Effective Date (0000-00-00), Policy Number, Group Number, Subscriber Employer (SE) (if unemployed enter Student, PT Student, or leave blank), SE Address, SE City, SE State, SE Zip, SE Country, Relationship, Subcriber, D.O.B., S.S., Subscriber Address, City, Zip Code, Subscriber Phone, CoPay, and Accept Assignment (YES). A "Find" bar at the bottom left allows searching by Name, ID, SSN, DOB, Any, or Filter.

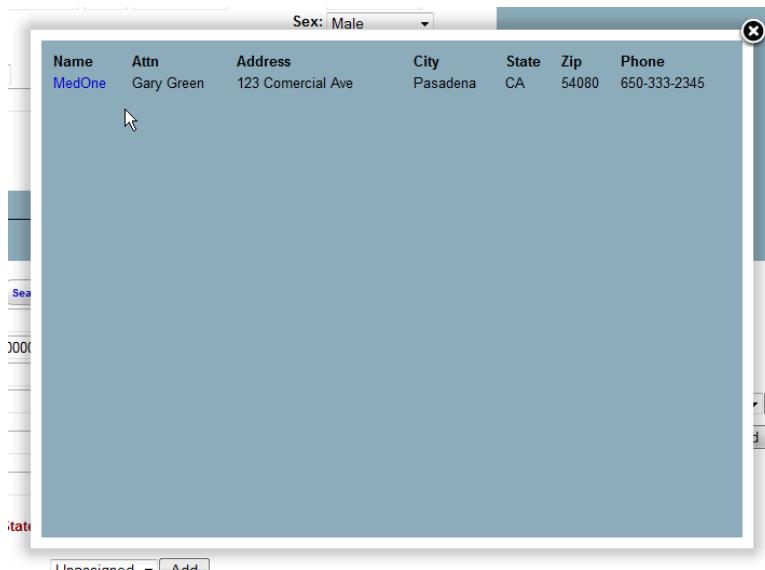
Select the patient's insurance company from the drop-down list, or you can search for it by clicking 'Search/Add'. Doing so brings up a lightbox containing several fields which are searchable (labeled in green). Entering a partial value into one or more fields and clicking the 'Search' button presents you with a list of all insurance companies matching those parameters.

This is a search results lightbox for insurance companies. It contains the following fields:

- Name: (highlighted in green)
- Attention: (highlighted in green)
- Address1: (highlighted in green)
- Address2: (highlighted in green)
- City/State: Pasadena
- Zip/Country: USA
- Phone: (highlighted in green)
- CMS ID: (highlighted in green)
- Payer Type: Other HCFA
- X12 Partner: - None -

At the bottom of the lightbox are three buttons: "Search" (highlighted in green), "Save as New", and "Cancel". Below the lightbox, there is a small footer with "Unassigned" and "Add" buttons.

Selecting the desired name from the list will automatically make it the selection for that patient.



If the desired insurance company is not yet entered, you can also add it here by completing all the fields and clicking 'Save as New'. This also selects the newly added insurance company for this patient.

If the patient is also the insured party, then selecting "self" from the drop-down list will automatically populate the 'Subscriber' section with the relevant data for you.

When you are finished, click 'Save' at the top of the page to save and return to the Demographics summary. You can see that Insurance now has its own section, and all of the new patient data is now visible on the summary page.

## Patient History

Next select 'History' at the top of the Patient Summary page. This brings up a page containing information about the patient's medical history.

Clicking 'Edit' will bring up a data entry page with tabbed sections, similar to that of the Demographics page.

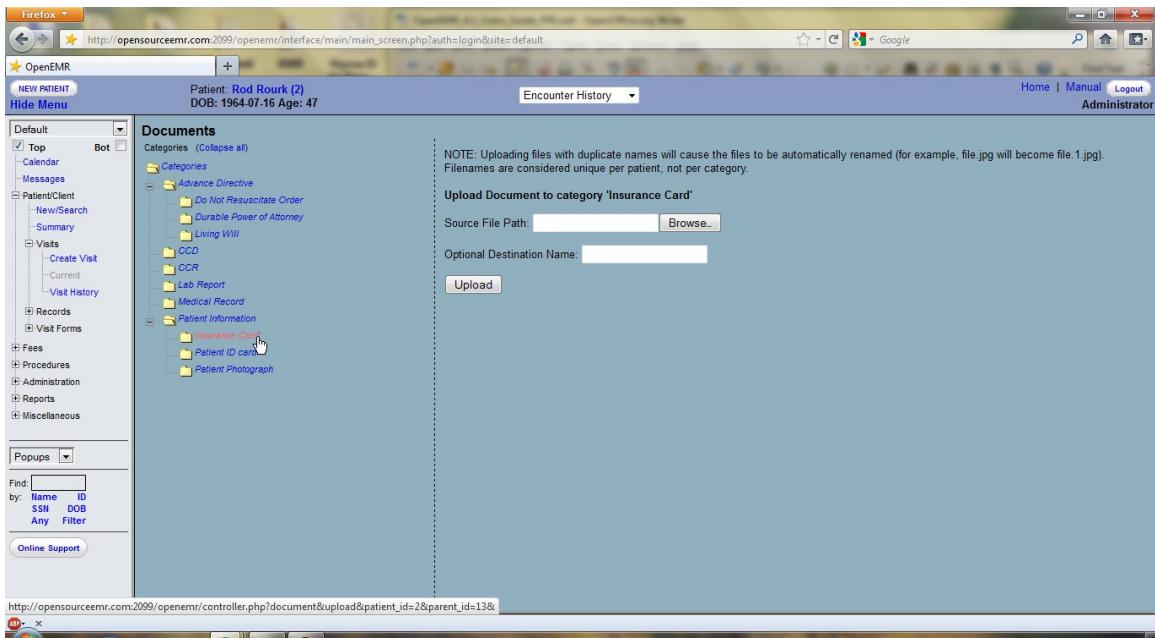
	Status:	<input type="radio"/> Current	<input type="radio"/> Quit	<input checked="" type="radio"/> Never	<input type="radio"/> N/A
Tobacco:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Coffee:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Alcohol:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Recreational Drugs:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Counseling:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Exercise Patterns:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Hazardous Activities:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Sleep Patterns:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
Seatbelt Use:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	

Access the desired sections by clicking on the appropriate tab and enter in the patient's data as necessary, then click 'Save'. Click 'Back To Patient' to return to the Patient Summary page.

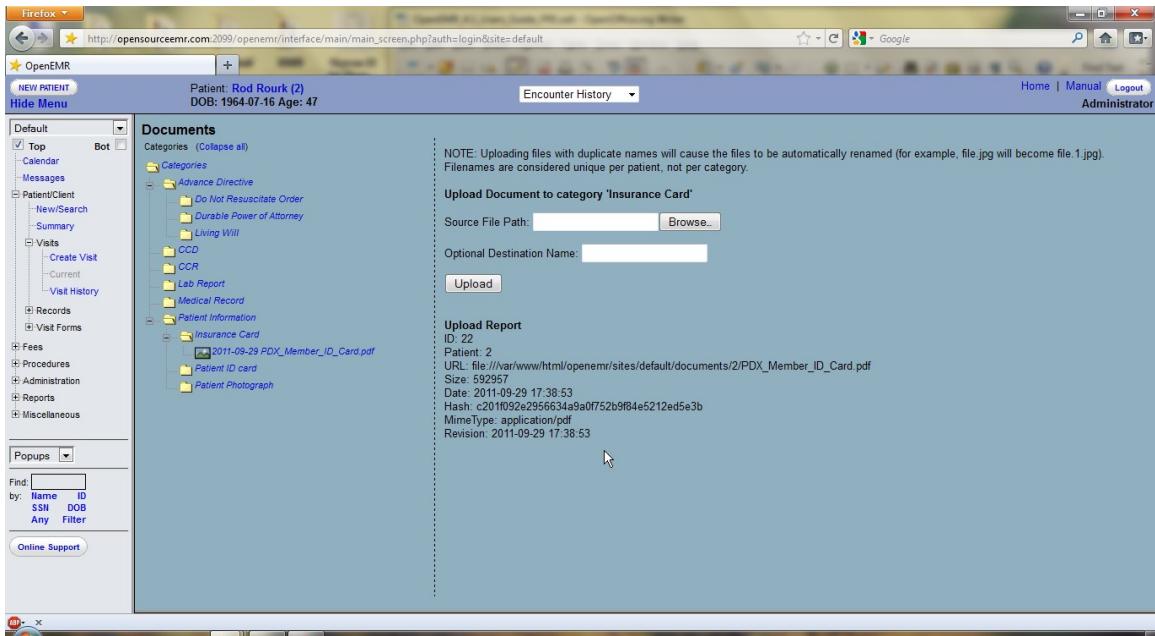
## Uploading Documents

Select 'Documents' at the top of the patient Summary page. Here you may upload files that you have scanned

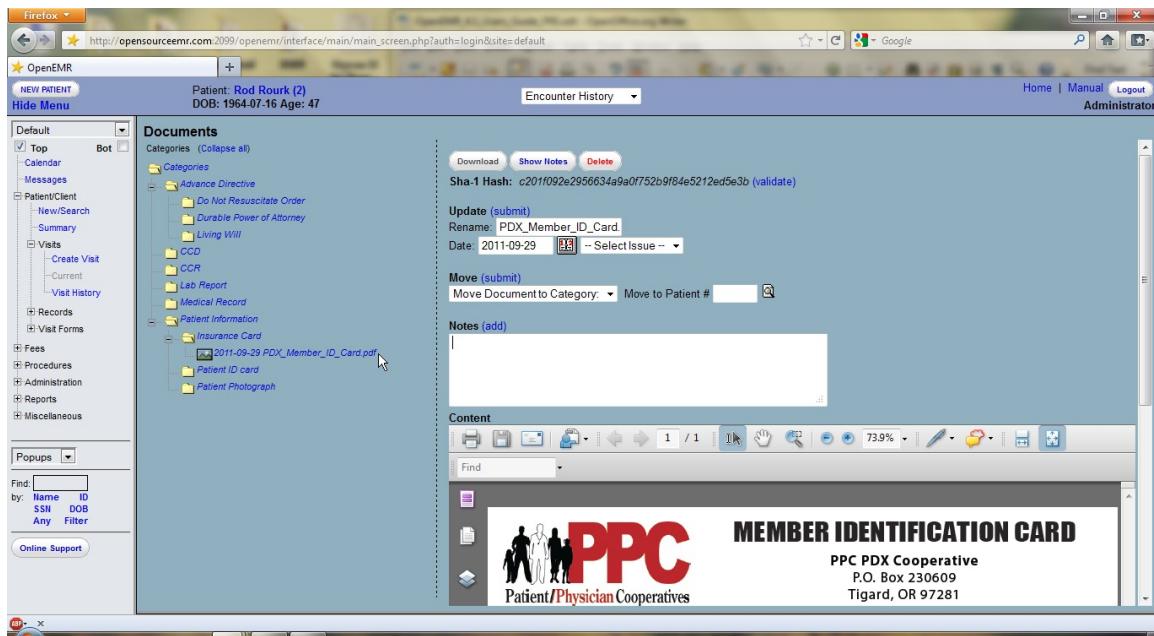
and/or saved, such as a patient's ID or insurance card.



First, click the appropriate Document Category for the file you wish to upload, then click 'Browse'. This will present you with the standard dialog for locating the file on your computer. Once the desired file has been selected, click 'Upload' to save the file in OpenEMR.



Once the file is uploaded, you will be presented with a report, confirming the file has been uploaded successfully. To see the new file, click on the plus sign next to the appropriate document category which displays a list of all the files in that category. Click on the name of the new file to view it.



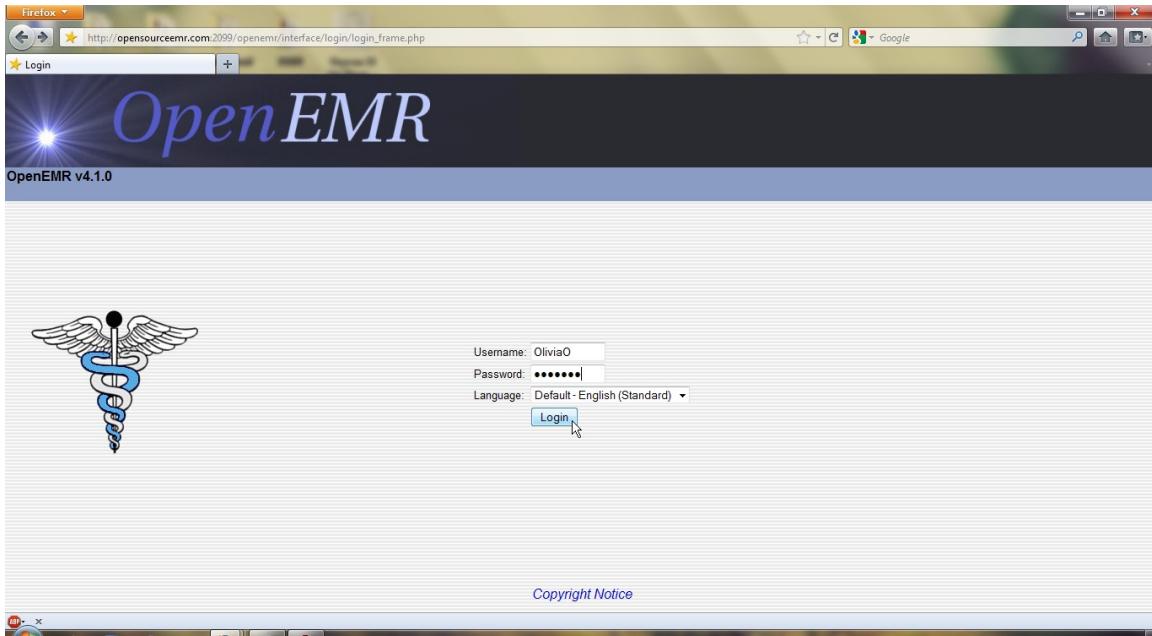
Here you can also attach a note to the document, associate it with a particular issue, or move it to a different category or patient.

# USING THE CALENDAR

In this section we'll discuss setting up a provider's schedule in the calendar and adding patient appointments.

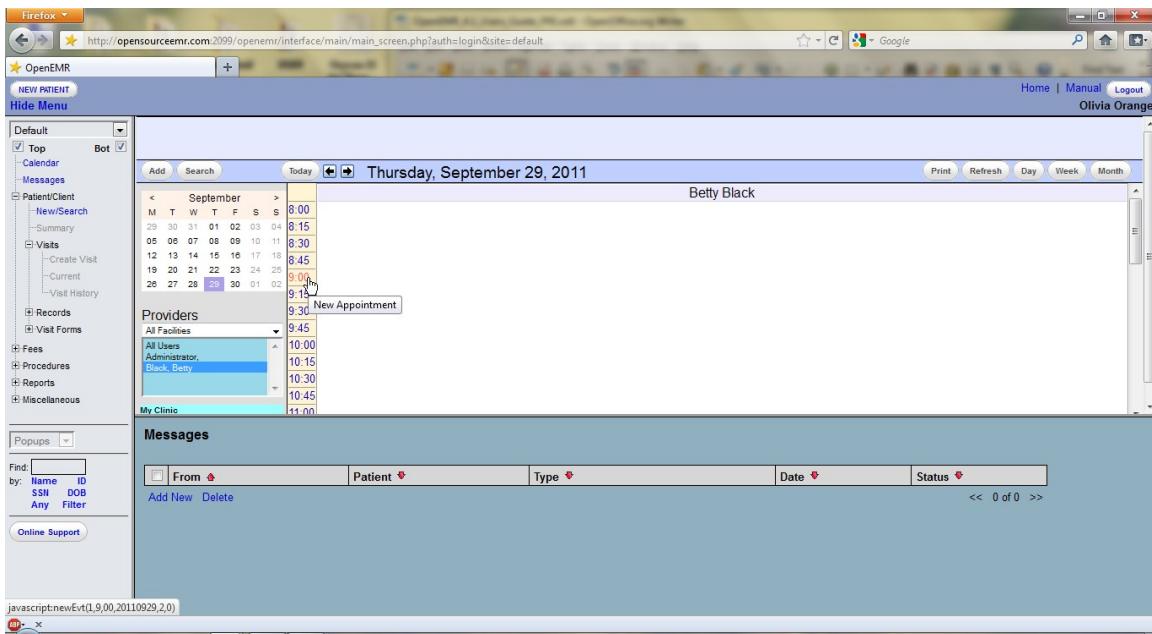
## Setting Up Schedules

Login to OpenEMR using your assigned username and password.

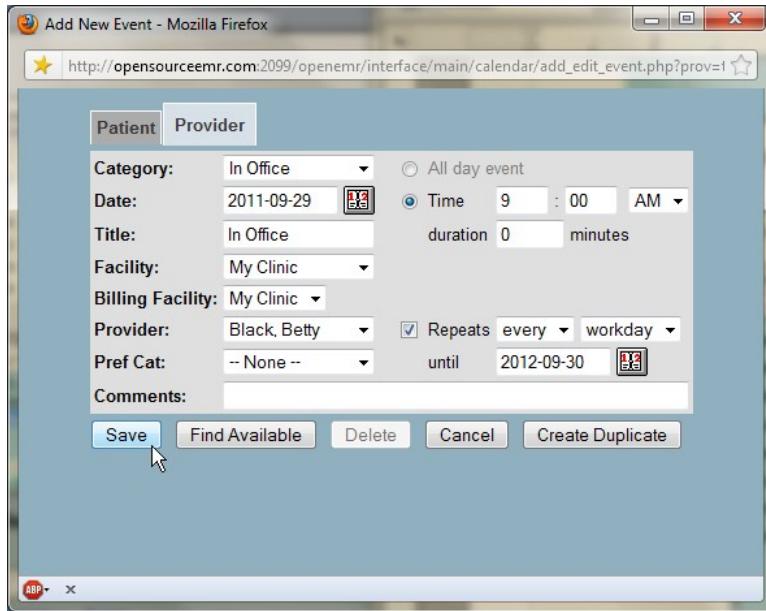


For users who are not practitioners, such as someone who works at the front desk, the Calendar will show the schedules of all the practitioners at the clinic by default. When you first start using OpenEMR you will need to set up schedules for all of your practitioners.

To do this, select from the 'Providers' list on the left the person who's schedule you wish to set up. Next click the time at which that provider is scheduled to enter the office.



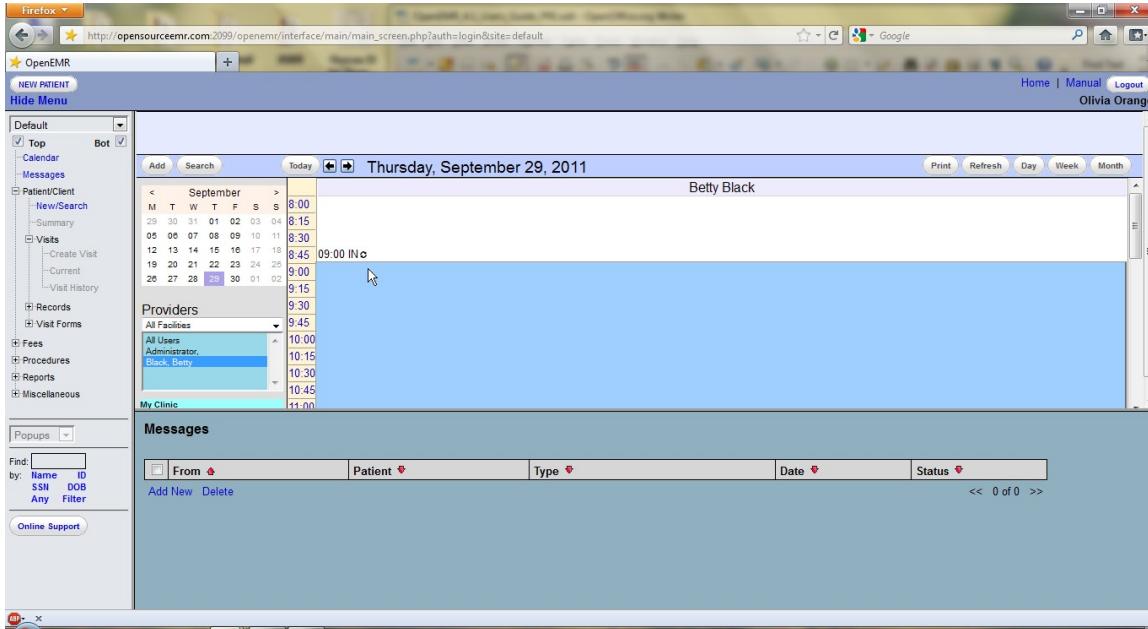
This will present you with the 'Add New Event' dialog box.



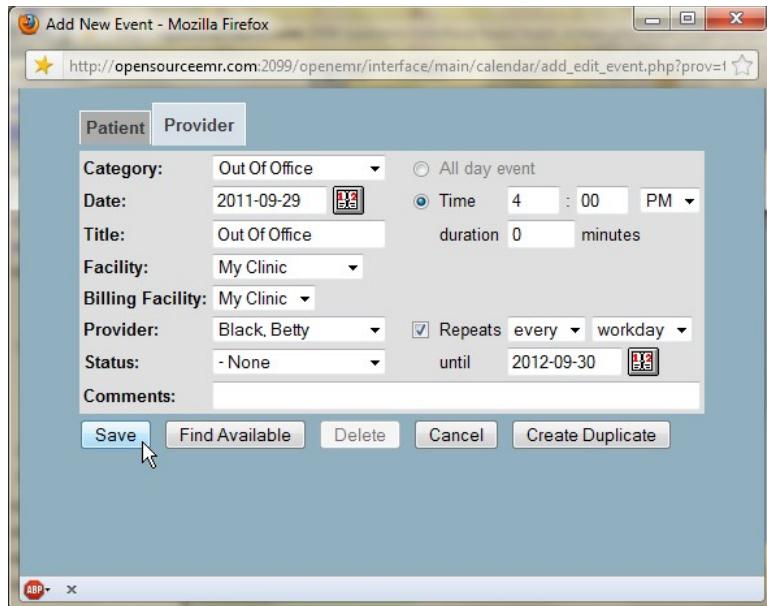
The clinic and provider name should be automatically filled in for you, as well as the time that you selected. Click the 'Provider' tab and choose "In Office" from the 'Category' drop-down list.

You can also choose to make this a repeating event, which allows you to set up an event only once for a given period of time. Do this by selecting the 'Repeats' checkbox, and setting the appropriate frequency & duration.

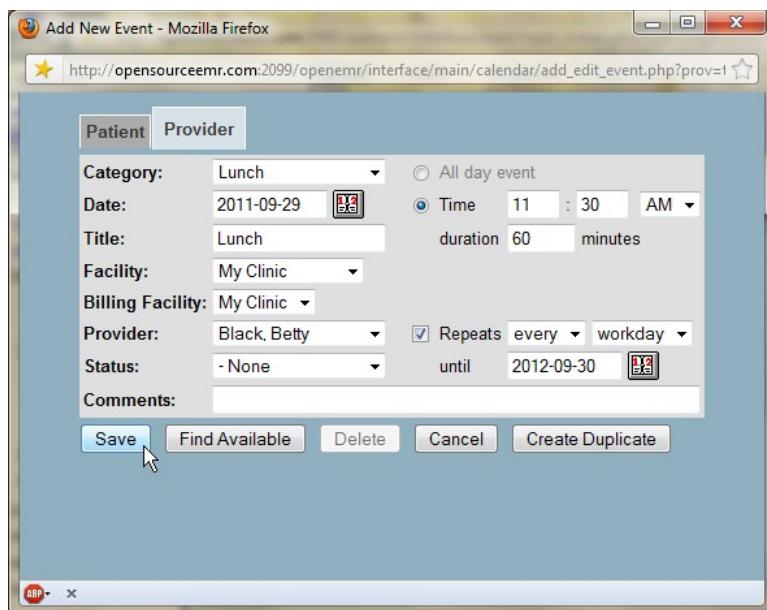
When you are finished click 'Save' to update the calendar. Now you will see a block of available time slots for that provider's schedule. Scroll down and click on the time that the provider is scheduled to leave the office for the day.



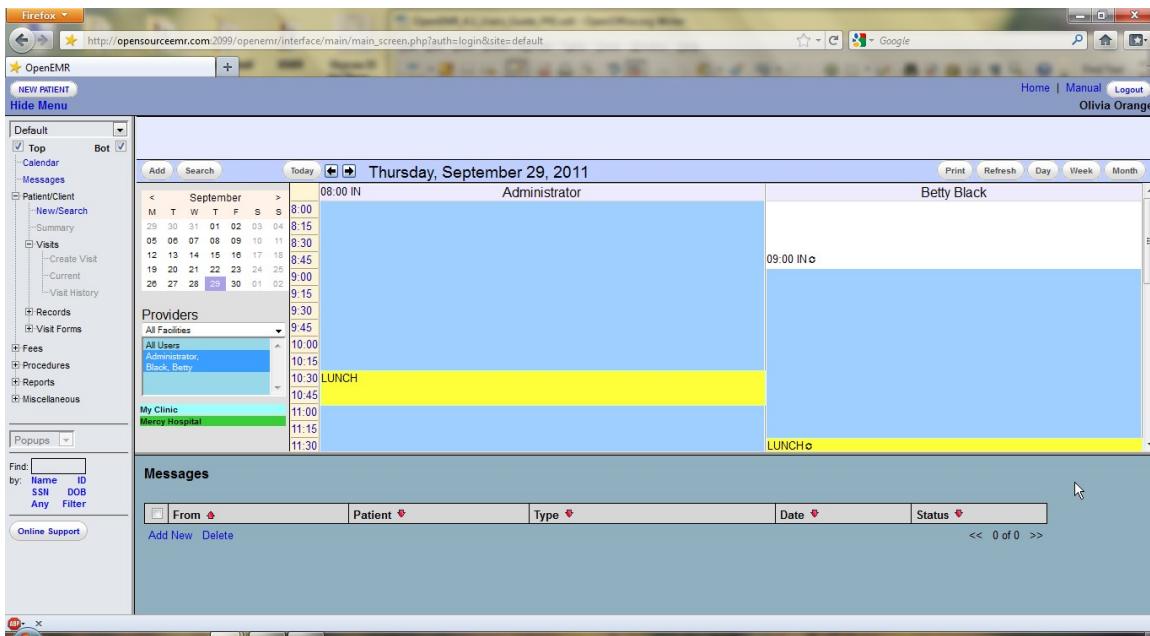
The same process is used to create a repeating "Out Of Office" event.



You can also add a lunch break in your practitioners' schedules. This is done the same way, with the exception of the duration, which in this case is non-zero.



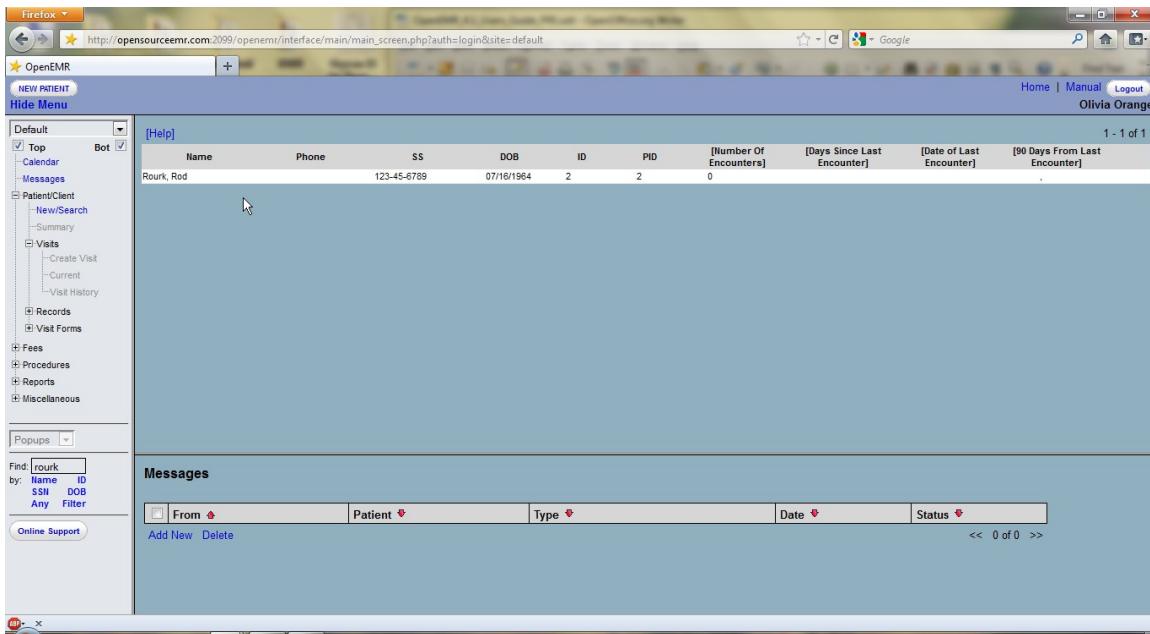
Now you can see your practitioner's full schedule laid out on the Calendar page. Continue setting up the Calendar in this fashion until all your practitioners' schedules have been entered.



## Making Appointments

Now that the clinic and all its practitioners are set up, you can begin scheduling appointments for your patients.

To locate a patient in the system, enter all or part of their name into the search field in the bottom left corner of the screen (below the navigation list) and click 'Name'. This will bring up a list of all the patients in your system matching that name. If you need to narrow the list, you can enter a longer search term, such as their full name (Eg. "rourk, rod").



Click on the desired name to bring up the Demographics summary for that patient. If you have the patient on the phone, now would be a good time to confirm that their contact and insurance information is up to date. If the patient is not already in the system, you can select 'New/Search' from the menu to begin entering their information.

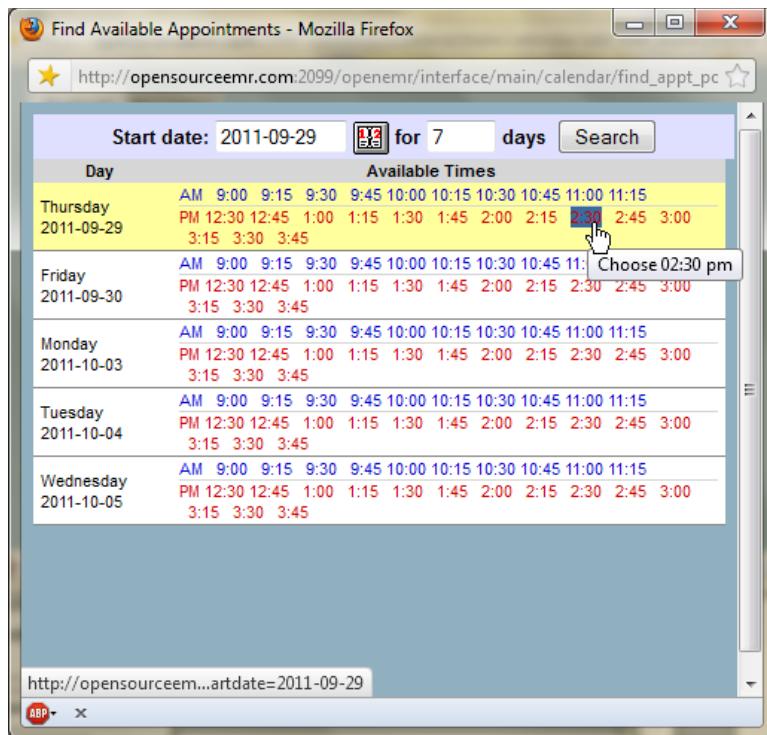
The screenshot shows the OpenEMR interface for patient Rourk, Rod. The left sidebar contains navigation links for Top, Calendar, Messages, Patient/Client (with New/Search and Summary), Visits (Create Visit, Current, Visit History, Records, Visit Forms), Fees, Procedures, Reports, and Miscellaneous. A search bar at the bottom left allows filtering by Name, ID, SSN, DOB, and Any Filter. The main content area displays patient details (Patient: Rod Rourk (2), DOB: 1964-07-16 Age: 47) and encounter history. On the right, the 'Appointments' section is collapsed, showing a link to 'Add'. Below it, the 'Vitals' section indicates 'No vitals have been documented.' and a note '(Issues not authorized)'.

The right-hand side of the Patient Summary shows a list of all current and future appointments for that patient. Click 'expand' next to the Appointments section if the list is not already visible. Click 'Add' to schedule an office visit.

This will present you with the same Add New Event dialog used earlier. “Office Visit” is selected as the Category by default. You can change the category to “New Patient” if this is their first visit. If a primary provider has been entered for that patient, they will be selected automatically.

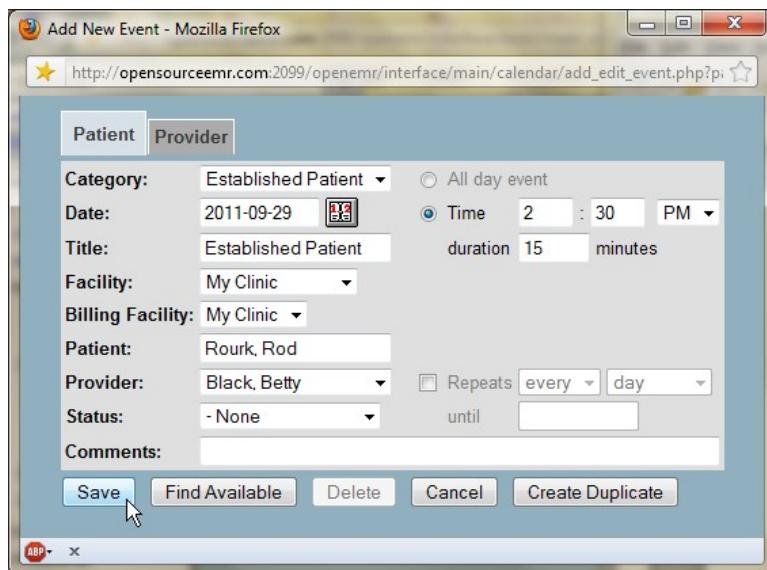
The screenshot shows the 'Add New Event' dialog box. It has tabs for 'Patient' and 'Provider'. The 'Patient' tab is active, showing fields for Category (Established Patient), Date (2011-09-29), Time (5:00 PM), Title (Established Patient), Facility (My Clinic), Billing Facility (My Clinic), Patient (Rourk, Rod), Provider (Black, Betty), Status (-None), and Comments. There is a checkbox for Repeats with options every day. At the bottom are buttons for Save, Find Available, Delete, Cancel, and Create Duplicate. The 'Find Available' button is highlighted with a cursor.

Click 'Find Available' to see a list of appointment times available for that provider for the next 7 days. You can change the start date or the number of days shown and click 'Search' to display a new list using those parameters.

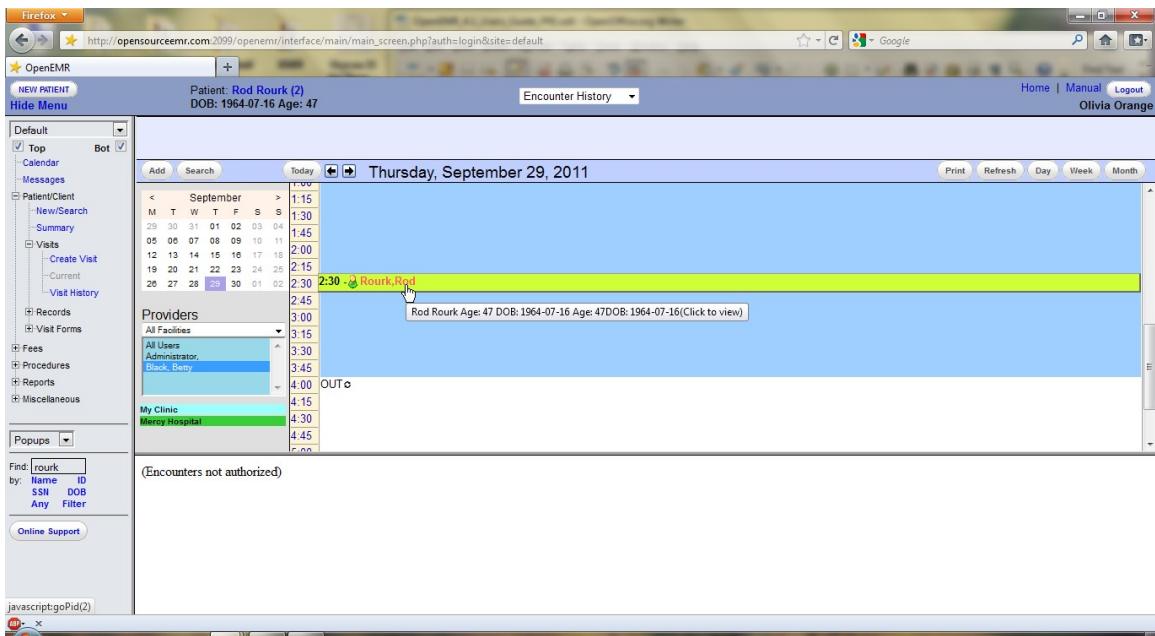


Once a date and time have been agreed upon, selecting that time from the list will close the window, and the selected time will appear in the Add Event dialog.

Make sure to enter the correct duration for the appointment and click 'Save'.



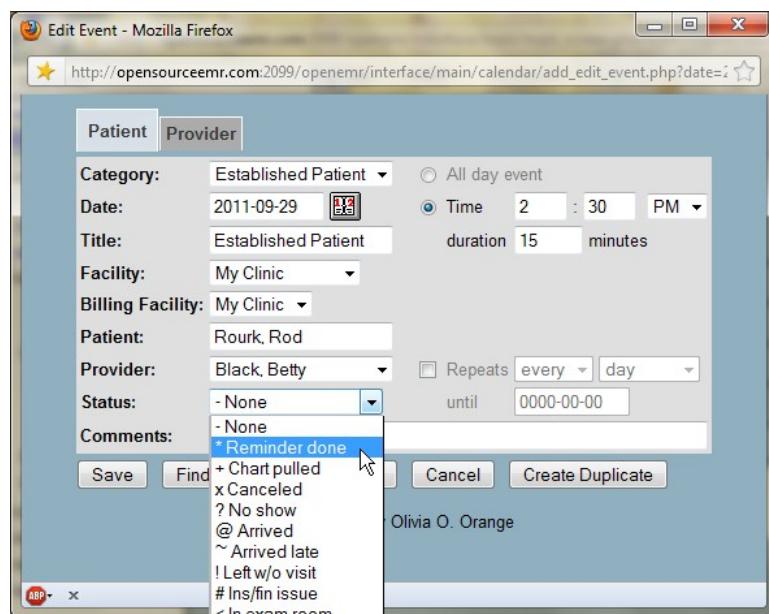
Return to the calendar using the navigation menu on the left. Advancing to the appropriate date, using the arrows at the top of the screen, shows the new appointment listed in the provider's schedule. Mousing over the patient's name displays a tool-tip with information about that patient, such as date of birth.



## Appointment Status

OpenEMR's calendar system includes a status indicator, allowing doctors and staff to see at a glance what is going on with all appointments and the corresponding encounters for the day.

To change the status of a given appointment, double-click on the appointment block. This brings up the Edit Event window. Choose the correct appointment status from the drop-down list. Notice each status has a unique symbol associated with it.



You can also type a note into the 'Comments' line if more information is needed. Click 'Save' to update the status of the appointment.

Edit Event - Mozilla Firefox

[http://opensourceemr.com:2099/openemr/interface/main/calendar/add\\_edit\\_event.php?date=2011-09-29](http://opensourceemr.com:2099/openemr/interface/main/calendar/add_edit_event.php?date=2011-09-29)

Patient	Provider	
Category:	Established Patient	All day event
Date:	2011-09-29	Time 2 : 30 PM
Title:	Established Patient	duration 15 minutes
Facility:	My Clinic	
Billing Facility:	My Clinic	
Patient:	Rourk, Rod	
Provider:	Black, Betty	<input type="checkbox"/> Repeats every day
Status:	* Reminder done until 0000-00-00	
Comments:	reminder call 9/28	
<input type="button" value="Save"/> <input type="button" value="Find Available"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Create Duplicate"/>		
Last update by Olivia O. Orange		

You can see that the symbol next to the appointment time has changed to indicate it's new status. Any comments are now also visible when mousing over the patient's name on the appointment calendar.

Firefox

[http://opensourceemr.com:2099/openemr/interface/main\\_screen.php?auth=login&site=default](http://opensourceemr.com:2099/openemr/interface/main_screen.php?auth=login&site=default)

Patient: Rod Rourk (2)  
DOB: 1964-07-16 Age: 47

Encounter History Home | Manual Logout Olivia Orange

Default Top Bot Calendar Messages

New Patient Hide Menu

PatientClient New/Search Summary

Visits Create Visit Current Visit History

Records Visit Forms

Fees Procedures Reports Miscellaneous

Popups

Find: rourk by: Name ID SSN DOB Any Filter

Online Support

javascript:goPid(2)

Thursday, September 29, 2011

11:00 11:15 11:30 LUNCH 11:45 12:00 12:15 12:30 12:45 1:00 1:15 1:30 1:45 2:00 2:15 2:30 2:45 2:55

Providers All Facilities All Users Administrator, Black, Betty

My Clinic Mercy Hospital

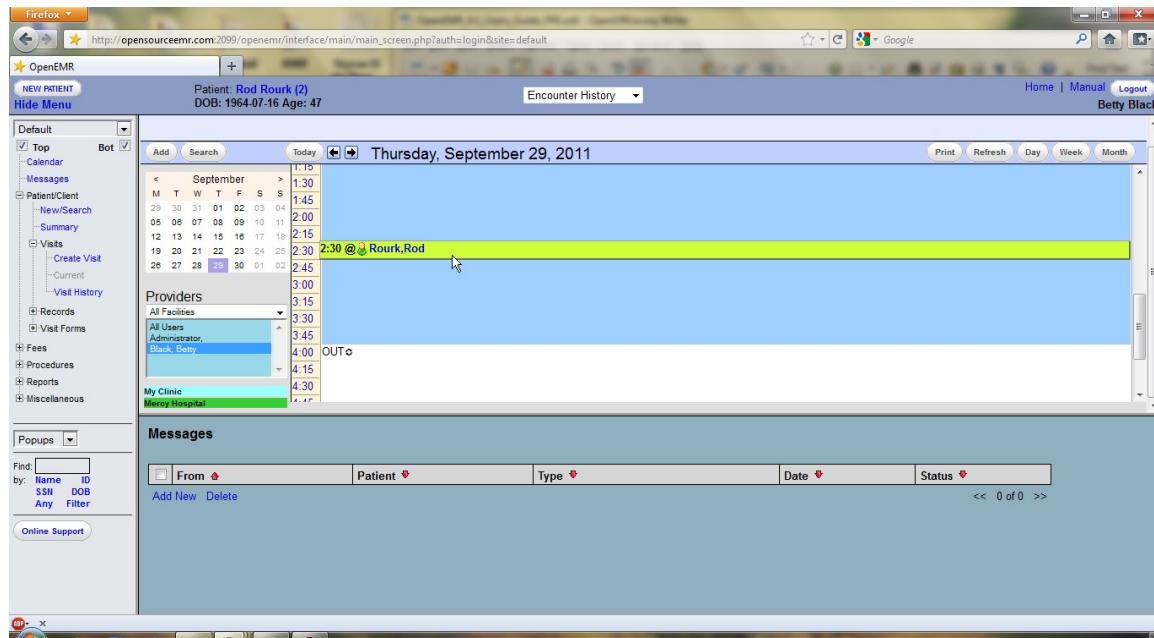
Rod Rourk Age: 47 DOB: 1964-07-16 Age: 47 DOB: 1964-07-16 reminder call 9/28 (Click to view)

(Encounters not authorized)

## ENCOUNTERS & CODING

Patient encounters are handled primarily by a clinic's providers.

Logging in as a provider presents you with the Calendar page showing only that provider's schedule by default. To view another provider's schedule, select the desired user from the list to the left of the calendar.



The bottom window also shows any notes left for that provider about their patients.

The Calendar shows the appointments scheduled for that day. Providers can see the status of any given appointment, indicated by the symbol shown between the appointment time and the patient's name. The "@" symbol, for example, indicates that the patient has arrived at the clinic and is ready to begin their appointment.

### Opening a New Encounter

To begin the encounter, click on the patient's name in the Appointment Calendar. This brings you to the patient's Summary page, as well as the Past Encounters & Documents page which lists any previous encounters or files that were uploaded for that patient.

Select 'History' at the top of the page to view a summary of the patients Medical History and Lifestyle information. Click 'Edit' to enter any information that may be incomplete.

The Patient Encounters & Documents page at the bottom of the screen displays a list of all encounters that have been entered for this patient. For new patients, there may be no encounters listed.

By default, OpenEMR is set to generate an empty Encounter when a patient's status has been set to "Arrived" (@). To open this encounter and begin entering data, click on the new entry in the Encounters list, then click 'Edit' next to the provider's name.

If your clinic's version of OpenEMR is configured differently, you can begin a New Encounter manually by selecting 'Create Visit' from the navigation list on the left. Both methods will bring you to the New Encounter Form.

Here you can enter a brief description of the encounter and the date of service. Encounters for new patients will not have any Issues or Diagnoses associated with them at this time, so click 'Save' to continue with the encounter.

## Encounter Forms

This will bring you back to the summary page for this Encounter. Displayed is a list of all the forms associated with this encounter. You may click 'Edit' next to any of these forms to edit its contents.

At the top of the page are drop-down lists of forms that can be added to the encounter. OpenEMR comes configured with several common encounter forms by default, but your clinic may have their own customized encounter forms as well.

Select "SOAP" from the 'Clinical' drop-down list to add that form to the encounter.

The SOAP form will contain a subjective & objective record of the patient's vital information, as well as any notes on the assessment of the patient's health and suggested treatment plans.

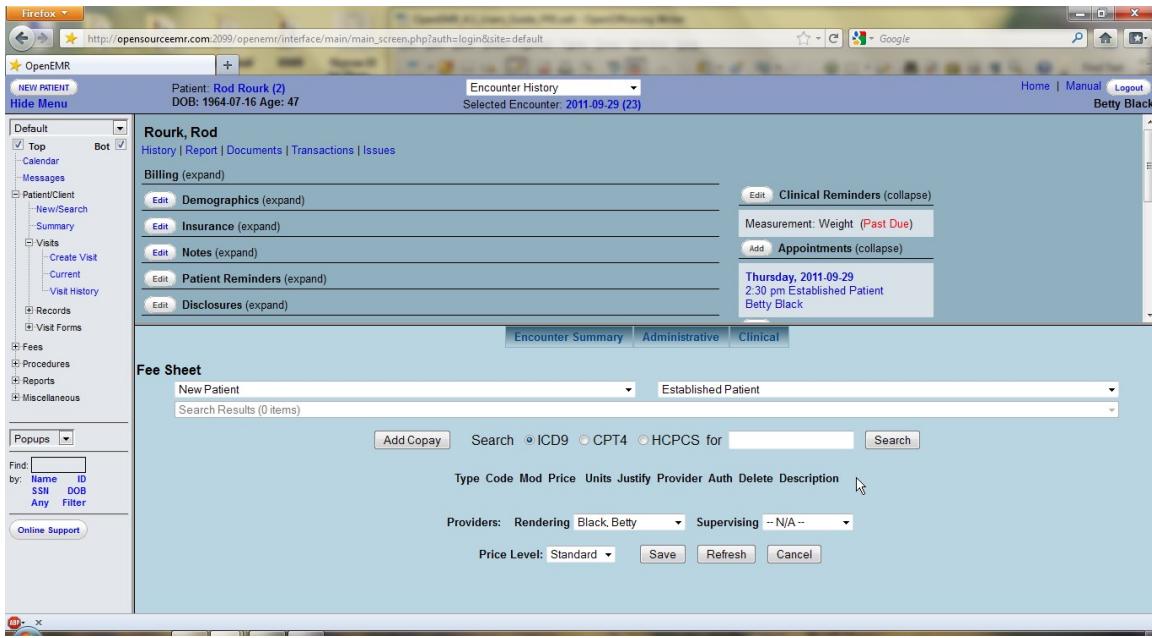
Enter the appropriate information and click 'Save Form' to return to the Encounter summary page.

You'll see that the SOAP form has been added to the list of forms for this encounter. Also shown is a summary of its contents.

## Using the Fee Sheet

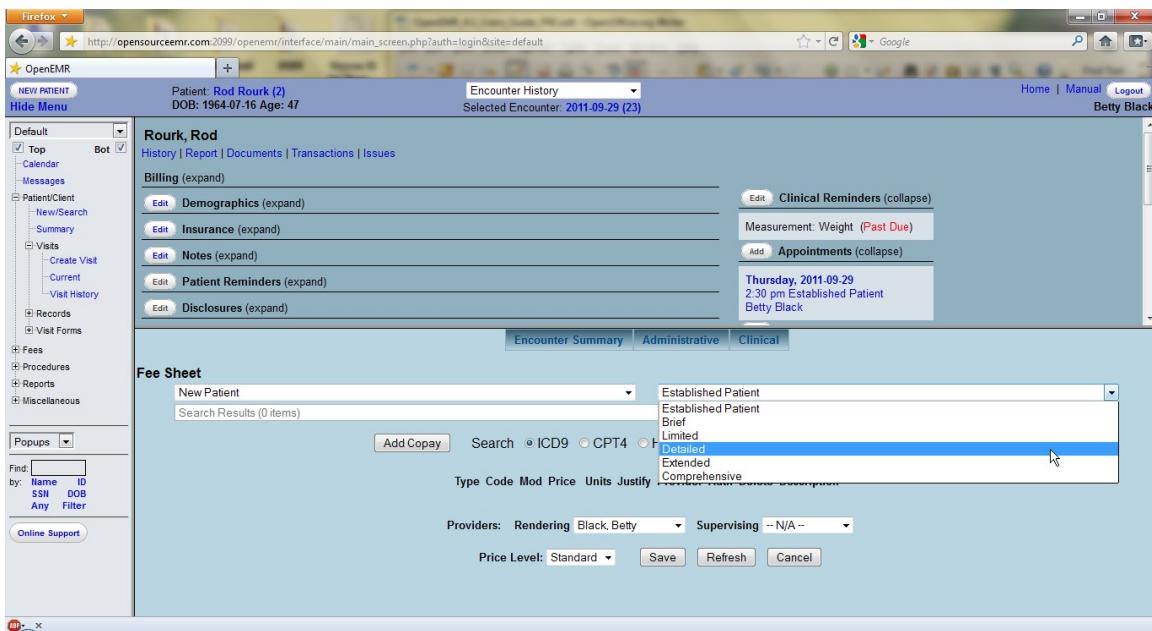
Next select the "Fee Sheet" from the 'Administrative' drop-down list. The Fee Sheet is different from most other forms in that it enters and modifies billing information that is stored elsewhere in the system; it is not really an encounter form, and when used it will not appear in the encounter's list of forms.

The Fee Sheet includes several drop-down lists of the most commonly used billing codes. It can and should be customized so that it's most suitably adapted to your practice.

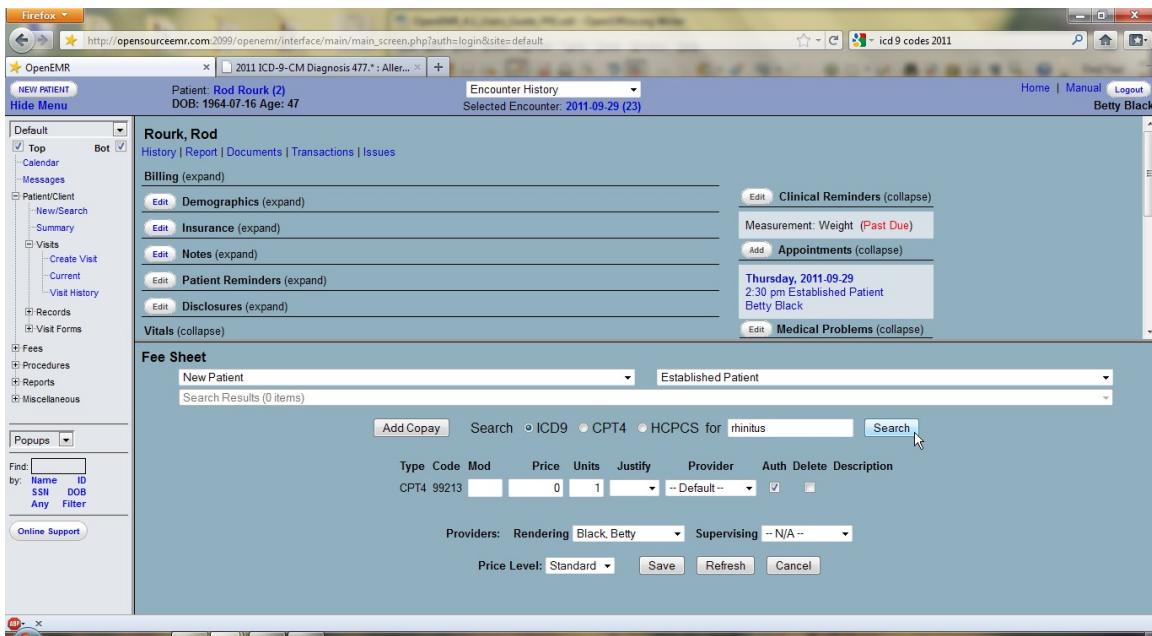


Included is a search feature, where you can search for and select from the thousands of billing codes in the database. And below that is a list of all the billing codes, along with their charges and other related information, that have been selected for this encounter.

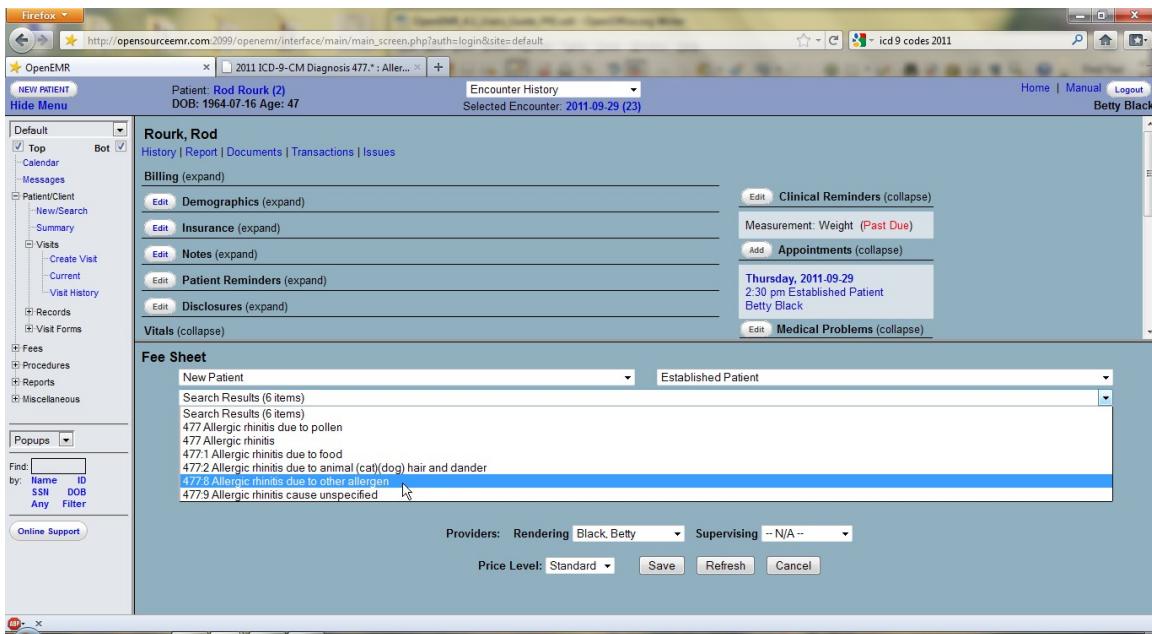
For example, selecting "Detailed" from the 'Established Patient' drop-down adds the associated CPT code to the list.



Look for an appropriate billing code by entering a search term in the box to the left of the 'Search' button. Make sure the correct code type is selected and click 'Search'.



The drop-down list above will then be populated with any billing codes that match your search parameters. Selecting the desired code from the list will add it to the list of codes for this encounter.



The Fee Sheet also allows you to justify the selected codes for billing purposes. Justification is the association of ICD9 codes with procedure codes. Insurance companies require this for billing, in order to "justify" paying for procedures.

To do this, click the drop-down menu under 'Justify' for the desired CPT code. Select the appropriate ICD9 code from the list and click 'Save'.

Type	Code	Mod	Price	Units	Justify	Provider	Auth	Delete	Description	
CPT4	99213			0	1	477	Black, Betty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Allergic rhinitis due to other allergen
ICD9	477			8			Black, Betty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Allergic rhinitis due to other allergen

To see the Feet Sheet has been associated with this encounter, click 'Visit History' in the navigation menu to go to the list of encounters for this patient. You can see that the CPT & ICD9 codes are listed next to the new encounter, as well as the SOAP form that was added earlier.

Date	Issue	Reason/Form	Provider	Billing	Insurance
2011-09-29	cough & chest congestion	SOAP	Black, Betty B.	99213 477	Primary: MedOne
2011-09-29	Document: PDX_Member_ID_Card.pdf (Insurance Card)				

## Adding Prescriptions

To prescribe medication for this patient click 'Edit' next to the Prescriptions section in the Patient Summary window, and click 'Add'.

This presents you with a form for entering prescription data, including dosage, refills, and whether or not generic over-the-counter substitutions are allowed for this patient.

The screenshot shows the 'Prescriptions' application interface. On the left is a sidebar with 'Prescriptions' and 'List' buttons. The main window has a title bar 'Add/Edit' with 'Save' and 'Back' buttons, and an 'E-Prescription?' checkbox. It contains fields for 'Starting Date' (September 29, 2011), 'Provider' (Betty Black), 'Drug' (empty field with placeholder '(click here to search)'), 'Quantity' (empty), 'Medicine Units' (empty), 'Take' (empty), 'Refills' (00), 'Notes' (empty), and 'Add to Medication List' (radio buttons for 'No' and 'Yes'). A cursor is hovering over the 'Drug' search field.

The Prescription form includes a search function for looking up a particular type of medication. Selecting '(click here to search)' next to the Drug field will bring up a new field into which a search term may be entered.

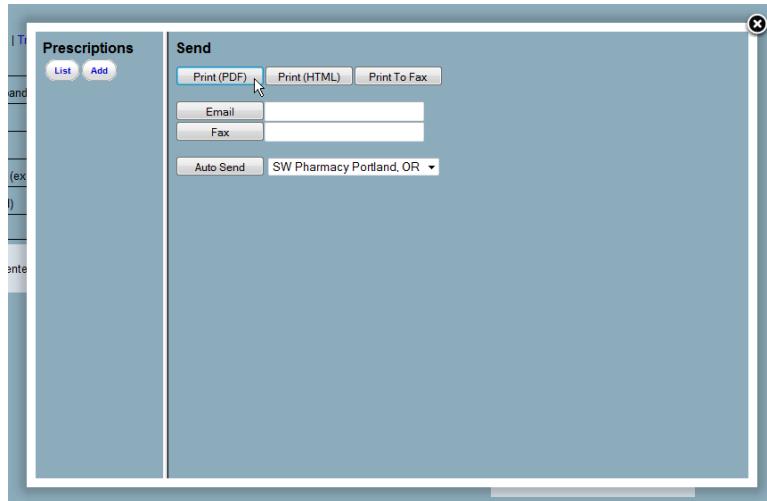
Clicking 'Search' displays a drop-down list of possible medications generated by connecting to the web site [www.rxlist.com](http://www.rxlist.com). Selecting the desired medication will fill in the Drug field for you.

This screenshot is similar to the previous one, but the 'Drug' field now contains 'claritin'. A dropdown menu is open over the field, with 'Search' highlighted. The rest of the form fields are identical to the first screenshot.

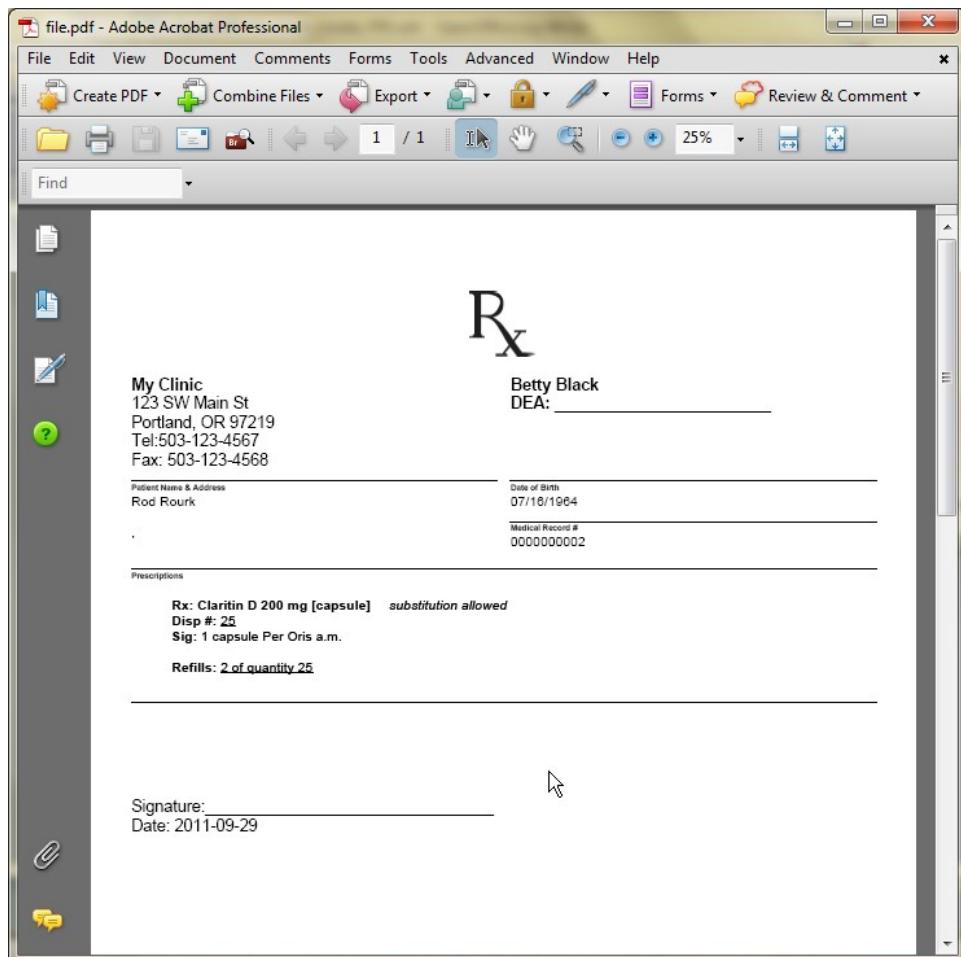
Selecting 'Yes' next to 'Add to Medication List' will allow the prescription to be included in the Issues list as a Medication as well.

The screenshot shows the completed prescription details. The 'Drug' field is now populated with 'Claritin D'. Other fields include 'Quantity' (25), 'Medicine Units' (200 mg), 'Take' (1 capsule Per Oris a.m.), 'Refills' (02), and 'Notes' (empty). The 'Add to Medication List' section shows 'Yes' selected. The cursor is hovering over the 'Yes' radio button.

Enter the correct data to complete the form and click 'Save'. You are then presented with a form for generating a PDF of the prescription information. It may be printed or sent by email or fax. Choosing a pharmacy from the drop down list and clicking 'Auto Send' will use whichever default method was selected when you set up that pharmacy.



Clicking 'Print (PDF)' will generate the following PDF document to be saved or printed as necessary. The default template for this form may also be customized to your clinic's own specifications.



# ISSUES & IMMUNIZATIONS

## Adding Issues

An "issue" is a medical problem, allergy, medication, surgery or dental issue. These issues are related in that they can all be associated with multiple encounters.

This is especially useful with medical problems, where the user may want to quickly determine which encounters treated a particular problem, or which problems were treated by a particular encounter.

The Issues list can be found on the right-hand side of the Patient Summary page.

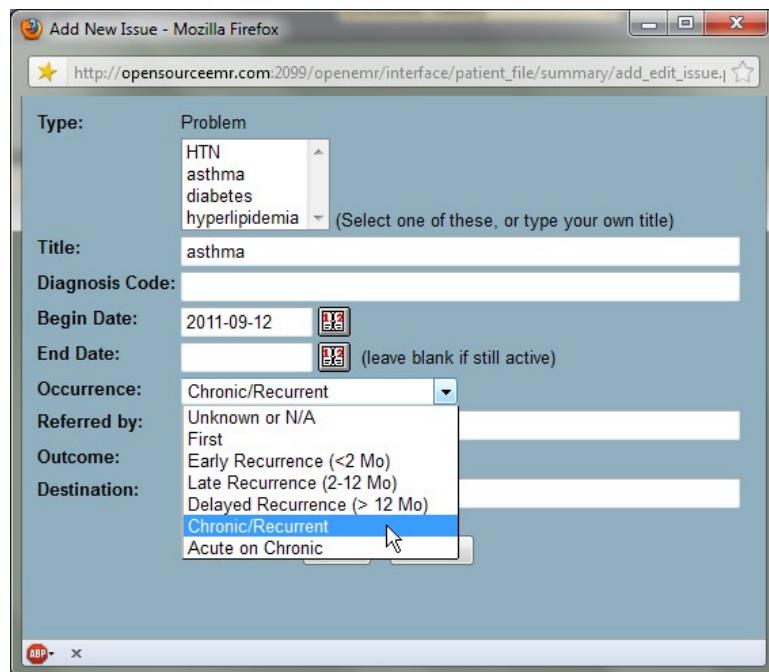
A screenshot of the OpenEMR interface for patient Rod Rourk. The left sidebar shows navigation links like Top, Calendar, Messages, Patient/Client, and Visits. The main content area displays patient details (Patient: Rod Rourk [2], DOB: 1964-07-16 Age: 47) and an 'Encounter History' dropdown. On the right, a vertical list of issues is shown under 'Medical Problems (collapse)'. The list includes:

- Measurement: Weight (Past Due)
- Appointments (collapse)
- Thursday, 2011-09-29  
2:30 pm Established Patient  
Betty Black
- Medical Problems (collapse)
  - Nothing Recorded
- Allergies (collapse)
  - Nothing Recorded
- Medications (collapse)
  - Claritin D
- Immunizations (collapse)
  - None
- Prescription (collapse)
  - Claritin D 1 in capsule a.m.

You can see that the prescription added earlier has been listed in the Medications section. Clicking 'Edit' next to one of these sections will present you with this patient's issues list for that category. Click 'Add' to add a new medical issue you want to keep track of for this patient.

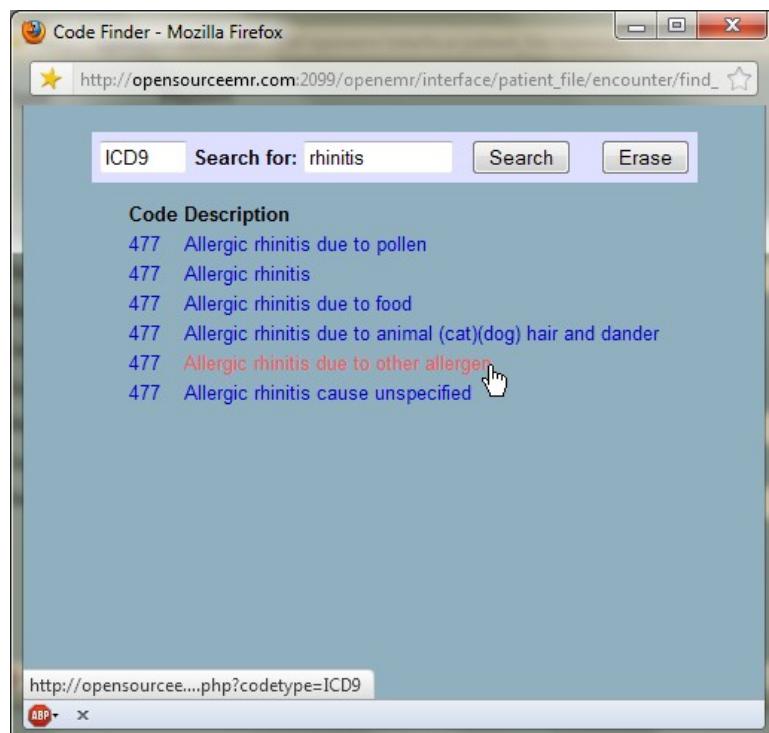
A screenshot of the OpenEMR interface showing the 'Medical Problems' list. The left sidebar is identical to the previous screenshot. The main content area shows a table titled 'Medical Problems' with columns: Add, Title, Begin, End, Diag, Status, Occurrence, Referred By, Comments, and Enc. A single row is visible with the title 'None' and a checkbox next to it. A cursor is hovering over the 'Add' button.

This pops up the Add New Issue dialog box.



For each issue type there is a list of commonly selected titles which are customizable for your clinic's specific needs. If the desired title is not included, it can be typed into the text box below the list.

Enter the appropriate beginning and end dates, and select the 'Occurrence' from the drop-down list provided. Clicking in the 'Diagnosis' field will present a search dialog for locating the correct ICD9 code for this issue. Enter the appropriate search term and click 'Search' to bring up a list of possible ICD9 codes. Selecting the desired code will close the search window and enter the selected code in the text field.



Complete the remainder of the form as necessary and click 'Save'.

Additional issues are entered in the same manner; click 'Back' to return to the Patient Summary page and click 'Add' next to the appropriate issue type, or click 'Issues' at the top of the page to see a complete list of all issues for this patient. Notice that the 'Add New Issue' dialog also uses the OpenEMR date selection tool described earlier.

Once the new issues have been added successfully you should see an updated list of all the issues that have been entered for this patient. You may click on an issue in the list at any time to edit it.

Title	Begin	End	Diag	Status	Occurrence	Referred By	Comments	Enc
asthma	2011-09-12		ICD9:477 (Allergic rhinitis due to pollen)	Active	Chronic/Recurrent			0
penicillin	1979-04-16			Active	Unknown or N/A			0
Claritin D	2011-09-29			Active	Unknown or N/A			0

## Associating Issues with Encounters

The far right column in the Issues list represents the number of encounters associated with a given issue. Click on the '0' next to a newly added issue to bring up the Issues & Encounters dialog.

The screenshot shows the OpenEMR interface for patient Rod Rourk (2). The left sidebar includes links for Patient/Client, Visits, Fees, Procedures, Reports, and Miscellaneous. The main area displays five tables:

- Medical Problems**: Shows one entry for asthma, dated 2011-09-12, with ICD9:477 (Allergic rhinitis due to pollen) as the diagnosis.
- Allergies**: Shows one entry for penicillin, dated 1979-04-16.
- Medications**: Shows one entry for Claritin D, dated 2011-09-29.
- Surgeries**: Shows a single row with "None" selected.
- Dental Issues**: Shows a single row with "None" selected.

This dialog contains a list of all the issues and encounters associated with this patient. It is used to set (and view) the relationships between issues and encounters. Note that the issue that was just clicked on has been highlighted.

The dialog title is "Issues and Encounters for Rod Rourk (2)". It contains two sections:

- Issues Section** (radio button selected):
 

Type	Title	Description
Allergy	penicillin	
Problem	asthma	
Medication	Claritin D	
- Encounters Section** (radio button unselected):
 

Date	Presenting Complaint
2011-09-29	cough & chest congestion

Buttons at the bottom include Save, Add Issue, and Cancel. A note below the tables states: "Instructions: Choose a section and click an item within it; then in the other section you will see the related items highlighted, and you can click in that section to add and delete relationships."

Select the appropriate encounter from the list on the right to highlight it. Clicking 'Save' now links the selected issue to the selected encounter.

Issues and Encounters - Mozilla Firefox

http://opensourceemr.com:2099/openemr/interface/patient\_file/problem\_encounter.php?i=

### Issues and Encounters for Rod Rourk (2)

Issues Section			Encounters Section	
Type	Title	Description	Date	Presenting Complaint
Allergy	penicillin		2011-09-29	cough & chest congestion
Problem	asthma			
Medication	Claritin D			

**Save** **Add Issue** **Cancel**

**Instructions:** Choose a section and click an item within it; then in the other section you will see the related items highlighted, and you can click in that section to add and delete relationships.

Continue associating issues with encounters as necessary. Refreshing the Issues list shows the current information for all issues.

Firefox

http://opensourceemr.com:2099/openemr/interface/main/main\_screen.php?auth=login&site=default

OpenEMR

Patient: Rod Rourk (2)  
DOB: 1964-07-16 Age: 47

Encounter History

Home | Manual Logout Betty Black

Default

- Top
- Bot
- Calendar
- Messages
- New/Search
- Summary
- Vists
  - Create Visit
  - Current
  - Visit History
- Records
- Visit Forms
- Fees
- Procedures
- Reports
- Miscellaneous

Popups

Find: Name ID SSN DOB Any Filter

Online Support

Medical Problems

Title	Begin	End	Diag	Status	Occurrence	Referred By	Comments	Enc
asthma	2011-09-12		ICD9-477 (Allergic rhinitis due to pollen)	Active	Chronic/Recurrent			1

Allergies

Title	Begin	End	Diag	Status	Occurrence	Reaction	Referred By	Comments	Enc
penicillin	1979-04-16			Active	Unknown or N/A				0

Medications

Title	Begin	End	Diag	Status	Occurrence	Referred By	Comments	Enc	
Claritin D	2011-09-29			Active	Unknown or N/A				0

Surgeries

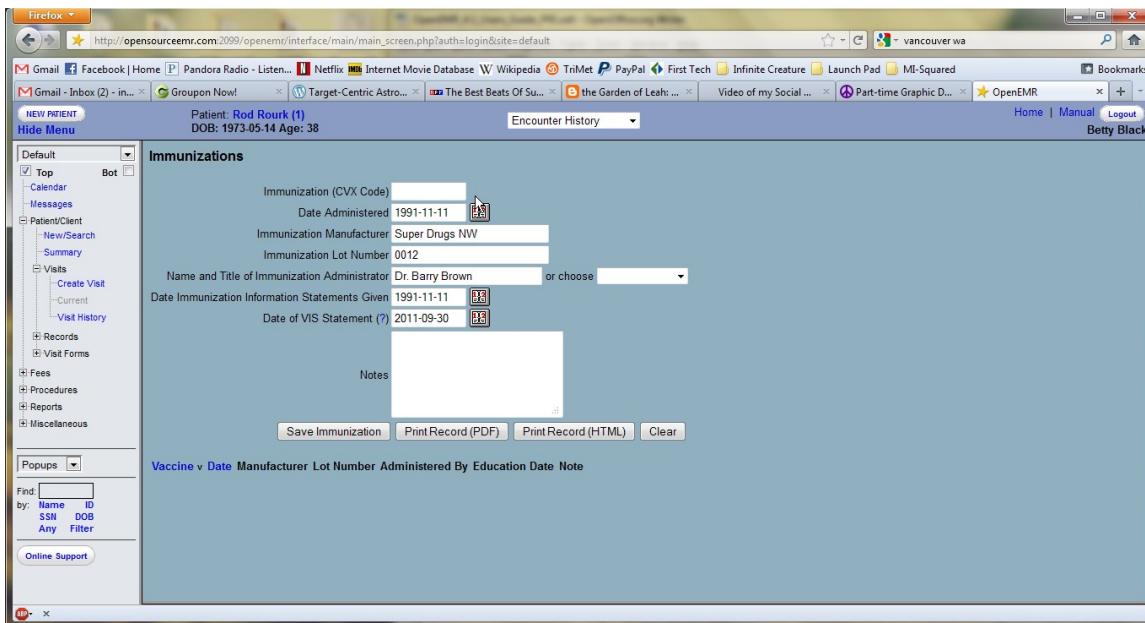
Title	Begin	End	Diag	Status	Occurrence	Referred By	Comments	Enc
None								

Dental Issues

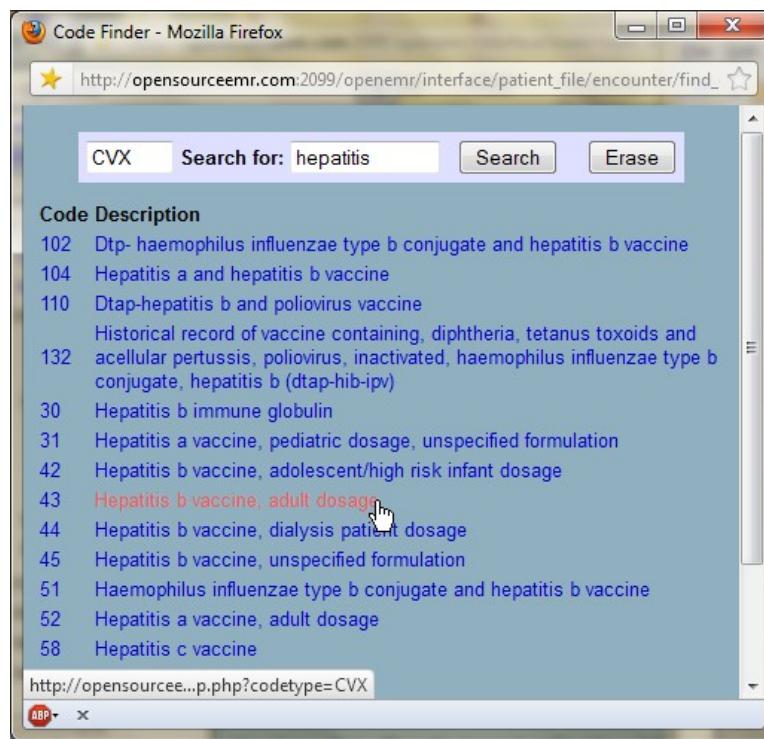
Title	Begin	End	Diag	Status	Occurrence	Referred By	Comments	Enc
None								

## Immunizations

Click 'Back' to return to the Patient Summary page. Now click 'Edit' next to the Immunizations section. This page contains a form for entering information on any immunizations the patient has received.



Click inside the 'Immunization (CVX Code)' field & select the correct immunization code using the search dialog provided.



Enter any data you may have, including the date of the shot, and the name of the provider who administered it. Click 'Save Immunization'. The newly added immunization now appears in the list at the bottom of the screen.

Firefox http://opensourceemr.com:2099/openemr/interface/main/main\_screen.php?auth=login&site=default

Gmail Facebook Home Pandora Radio - Listen... Netflix Internet Movie Database Wikipedia TriMet PayPal First Tech Infinite Creature Launch Pad MI-Squared Bookmarks

Gmail - Inbox (2) in... Groupon Now! Target-Centric Astro... The Best Beats Of Su... the Garden of Leah... Video of my Social... Part-time Graphic D... OpenEMR

Patient: Rod Rourk (1)  
DOB: 1973-05-14 Age: 38  
Encounter History Home | Manual Logout Betty Black

**Immunizations**

Immunization (CVX Code) Date Administered 2011-09-30  
Immunization Manufacturer  
Immunization Lot Number  
Name and Title of Immunization Administrator Black, Betty or choose Black, Betty  
Date Immunization Information Statements Given 2011-09-30  
Date of VIS Statement (?) 2011-09-30

Notes

Save Immunization Print Record (PDF) Print Record (HTML) Clear

Vaccine	Date	Manufacturer	Lot Number	Administered By	Education Date	Note
Hep B, adult	1991-11-11	Super Drugs NW	0012	Other	1991-11-11	<a href="#">Delete</a>

Popups Find by: Name ID SSN DOB Any Filter Online Support

Return to the Summary page via the navigation menu on the left. Notice that the right side of the Patient Summary page now shows an updated list of all active issues, immunizations and prescriptions.

Firefox http://opensourceemr.com:2099/openemr/interface/main/main\_screen.php?auth=login&site=default

OpenEMR Home | Manual Logout Betty Black

Patient: Rod Rourk (2)  
DOB: 1964-07-16 Age: 47  
Encounter History

**Rourk, Rod**  
History | Report | Documents | Transactions | Issues

**Billing (expand)**  
[Edit Demographics \(expand\)](#)  
[Edit Insurance \(expand\)](#)  
[Edit Notes \(expand\)](#)  
[Edit Patient Reminders \(expand\)](#)  
[Edit Disclosures \(expand\)](#)

**Vitals (collapse)**  
No vitals have been documented.

**Clinical Reminders (collapse)**  
Measurement: Weight ([Past Due](#))  
[Add Appointments \(collapse\)](#)

Thursday, 2011-09-29  
2:30 pm Established Patient  
Betty Black

**Medical Problems (collapse)**  
asthma

**Allergies (collapse)**  
penicillin

**Medications (collapse)**  
Claritin D

**Immunizations (collapse)**  
1991-11-11 - Hep B, adult

**Prescription (collapse)**  
Claritin D 1 in capsule a.m.

Popups Find by: Name ID SSN DOB Any Filter Online Support

## PATIENT NOTES & TRANSACTIONS

Patient notes store patient information that is unrelated to the patient's medical condition. Such information may include outstanding balances, changing insurance information or patient requests for actions by the clinic.

Transactions are somewhat similar, but record events that have already occurred. These may be referrals, requests from either the patient or the doctor, or legal transactions.

### Patient Notes

To begin, log in to OpenEMR, and locate the patient for which you would like to add a note. You may use the search function in the lower left-hand corner, for example.

Name	Phone	SS	DOB	ID	PID	[Number Of Encounters]	[Days Since Last Encounter]	[Date of Last Encounter]	[00 Days From Last Encounter]
Rourk, Rod		123-45-6789	07/16/1964	2	2	1	0	09/29/11	Wednesday, 12/28/11

Click on the desired patient to bring up the Patient Summary page.

If the user is not Authorized they will be unable to see the patient's medical details such as issues, immunizations and prescriptions.

Rourk, Rod

Patient: Rod Rourk [2]  
DOB: 1964-07-16 Age: 47

Encounter History

Billing (expand)

Demographics (expand)

Insurance (expand)

Notes (expand)

Disclosures (expand)

Vitals (collapse)

No vitals have been documented.

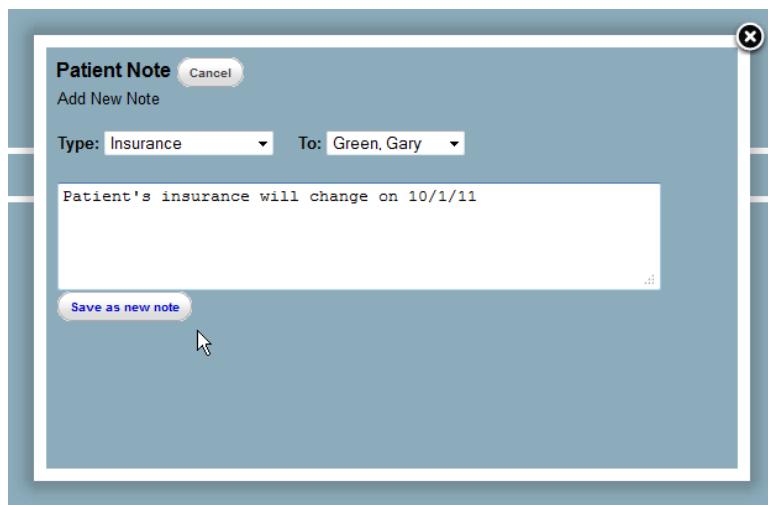
Add Appointments (collapse)

Thursday, 2011-09-29  
2:30 pm Established Patient  
Betty Black

(Issues not authorized)

Click 'Edit' next to the Notes section to bring up the Patient Notes page, then click 'Add'.

This will pop up a lightbox with a text field for entering the note, as well as drop-down lists for selecting the type of note, and the person to whom the note is addressed.



Type your note in the text box and click 'Save as new note'.

Patient Notes for Rourk, Rod

Active	Type	Content
<input checked="" type="checkbox"/>	Insurance	2011-09-29 20:31 (OliviaO to GaryG) Patient's insurance will change on 10/1/11

The new note now appears in the list on the Patient Notes page. The checkbox is used to control whether the note is "active". Click the 'Sent Items' tab to view any patient notes that have been addressed to others.

Click 'View Patient' to return to the patient summary.

Rourk, Rod

Billing (expand)

Inbox Sent Items

From	Date	Subject	Content	Status
OliviaO	2011-09-29	Insurance	2011-09-29 20:31 (OliviaO to GaryG) Patient's insurance will change on 10/1/11	New

The new note is now listed on the Summary page.

## Transactions

Select 'Transactions' at the top of the Patient Summary to go to the Patient Transactions page.

The Transactions page contains two basic form types. A simple form for internal transactions such as patient requests or billing transactions, and a referral form.

## Referrals

Click 'Add' and select "Referral" from the drop-down list to begin a new Referral transaction.

The screenshot shows the 'Add/Edit Patient Transaction' dialog box. The 'Transaction Type' dropdown is set to 'Referral'. The 'Referral' tab is selected. The form fields include:

- Referral Date:** 2011-09-29
- External Referral:** Yes
- Reason:** minor skin irritation on right forearm
- Risk Level:** Medium
- Refer By:** Betty Black
- Refer To:** Universal Health Center
- Referrer Diagnosis:** [empty field]
- Include Vitals:** Unassigned
- Requested Service:** [empty field]

A checkbox for 'Sent Medical Records?' is present in the top right corner.

Select the referring physician, risk level, etc., from the drop-down lists provided and enter a reason for the referral. Another drop-down contains a list of physicians and clinics from the Address Book to which you can refer your patient.

Click 'Save'. The referral is now in the Patient Transactions list.

The screenshot shows the 'Patient Transactions' list. A single entry is displayed:

Type	Date	User	Details
Referral	Thu September 29th	(OliviaO)	minor skin irritation on right forearm

Buttons for 'Print', 'Edit', and 'Add' are visible at the top left of the list.

Click 'Print' next to the transaction to generate a printable version of the Referral form.

Depending on your system's configuration, you may be asked to save the file, or it may be printed

automatically.

The image displays two identical "REFERRAL FORM" windows side-by-side. Each window contains the following fields:

- Clinic Copy**:
  - Name: Mr. Rod Rourk
  - Age: 47
  - Gender: Male
  - Address: \_\_\_\_\_
  - Postal: \_\_\_\_\_
  - Phone: \_\_\_\_\_
- Reference Reason**: minor skin irritation on right forearm
- Diagnosis**: \_\_\_\_\_
- Reference classification (risk level)**: Medium
- Doctor's name and signature**: Betty Black
- Referred to**: Cyan, Cindy / Universal Health Center
- My Clinic**:

123 SW Main St	Clinic ID	122333
Portland, OR 97219	Clinic ID	2
USA	Control No.	1
503-123-4567	Date	2011-09-29

When you are finished return to the Transaction list and click 'Add'.

## Basic Transactions

Other transaction types use the simple transaction form. Select the desired type from the list and enter the transaction details in the text box provided. Click 'Save' when finished.

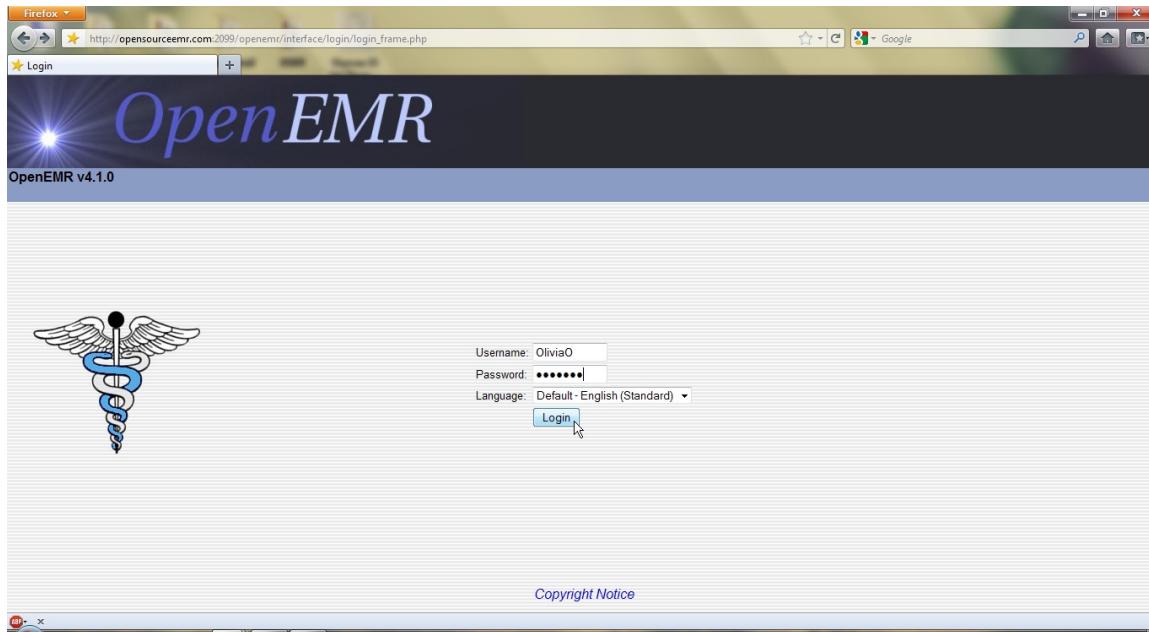
The image shows the "Add/Edit Patient Transaction" dialog box. It includes the following elements:

- Add/Edit Patient Transaction** (title bar)
- Save** and **Cancel** buttons
- Transaction Type:** Patient Request (dropdown menu)
- Details:** insurance approval for medical equipment requested

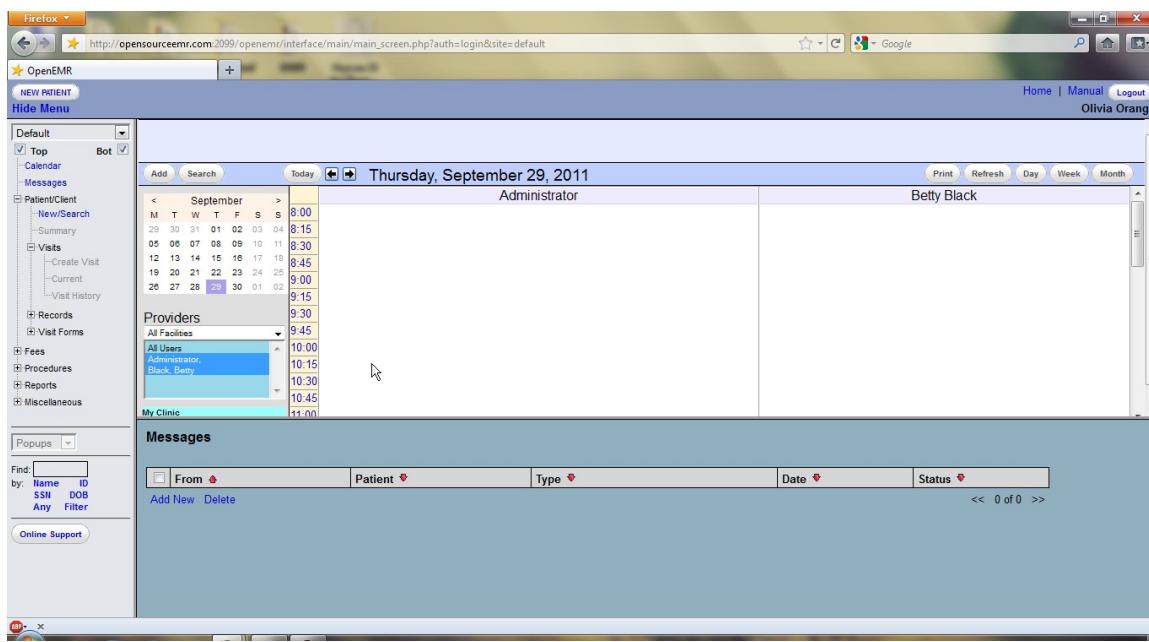
The new transaction has now been added to the list along with the referral. Click 'Edit' next to a transaction to edit its contents.

## BASIC BILLING

Only the Administrator, authorized users, and those with Access Control designated as “Accounting” in their user profile can access OpenEMR’s Billing system.



To begin, log in with your designated username and password.

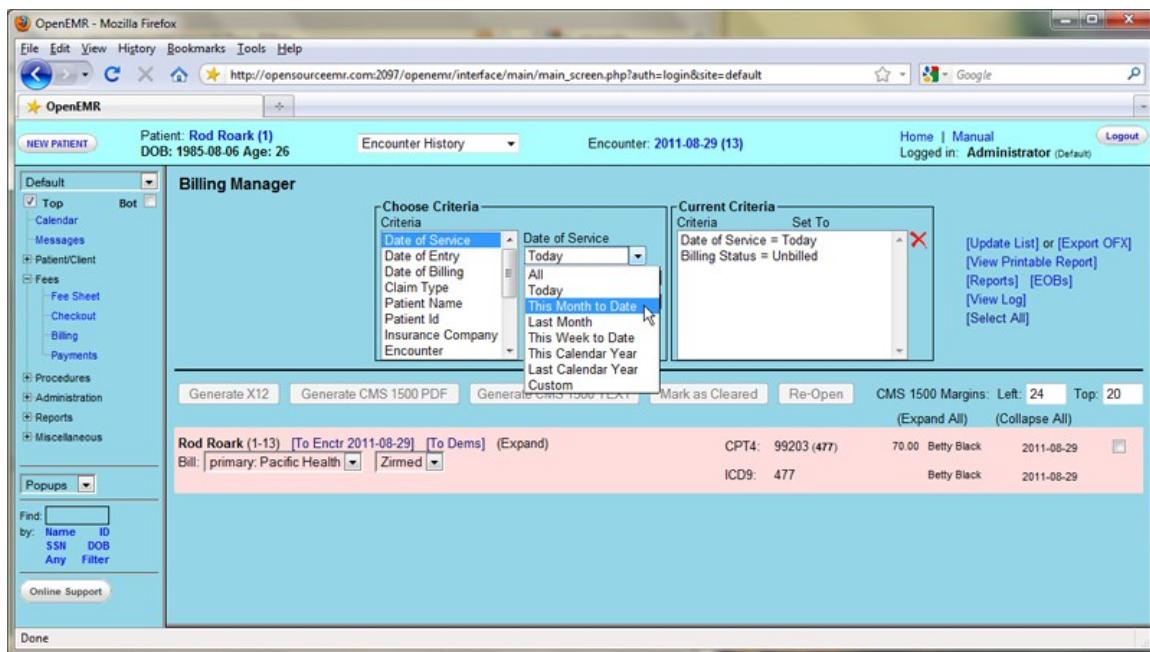


Select 'Fees - Billing' from the navigation menu on the left. This brings you to the main Billing screen. This will present you with options to generate a variety of printable and electronic claims and reports.

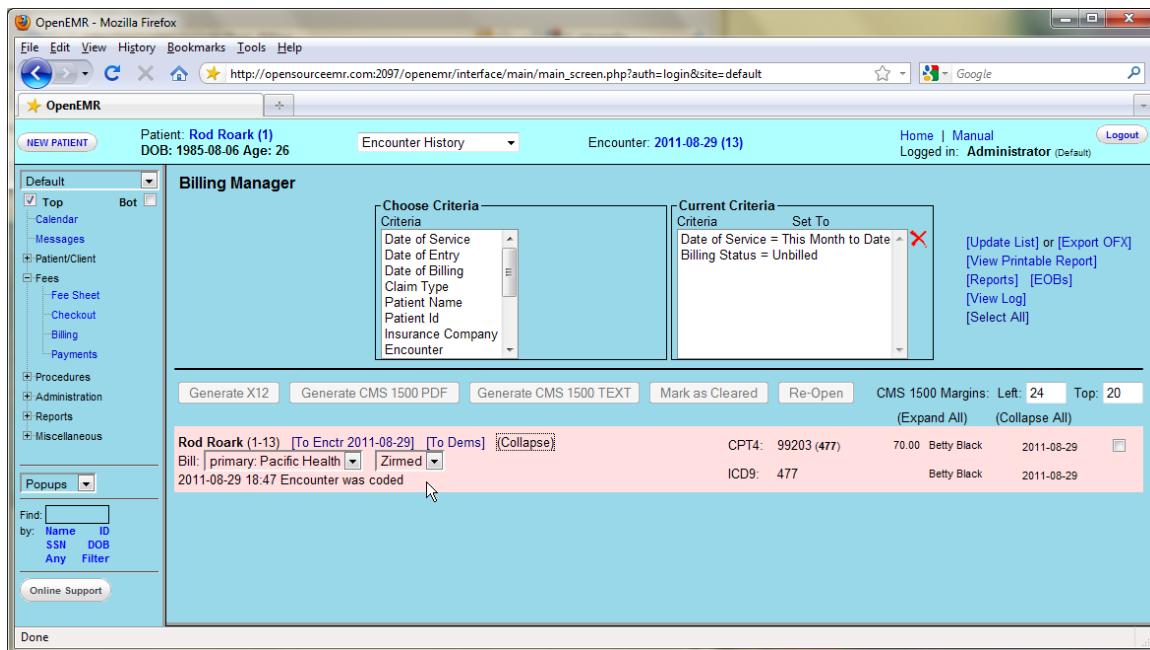
### Billing Reports

The Billing Report page will automatically display any billable encounters that were generated today. You may use the billing search tool to choose from a variety of criteria with which to search the available encounters.

For instance, to view billables from a different time period select 'Date of Service' from the 'Choose Criteria' section, choose the desired date range from the drop-down list, and click 'Update List' in the top right corner of the screen.

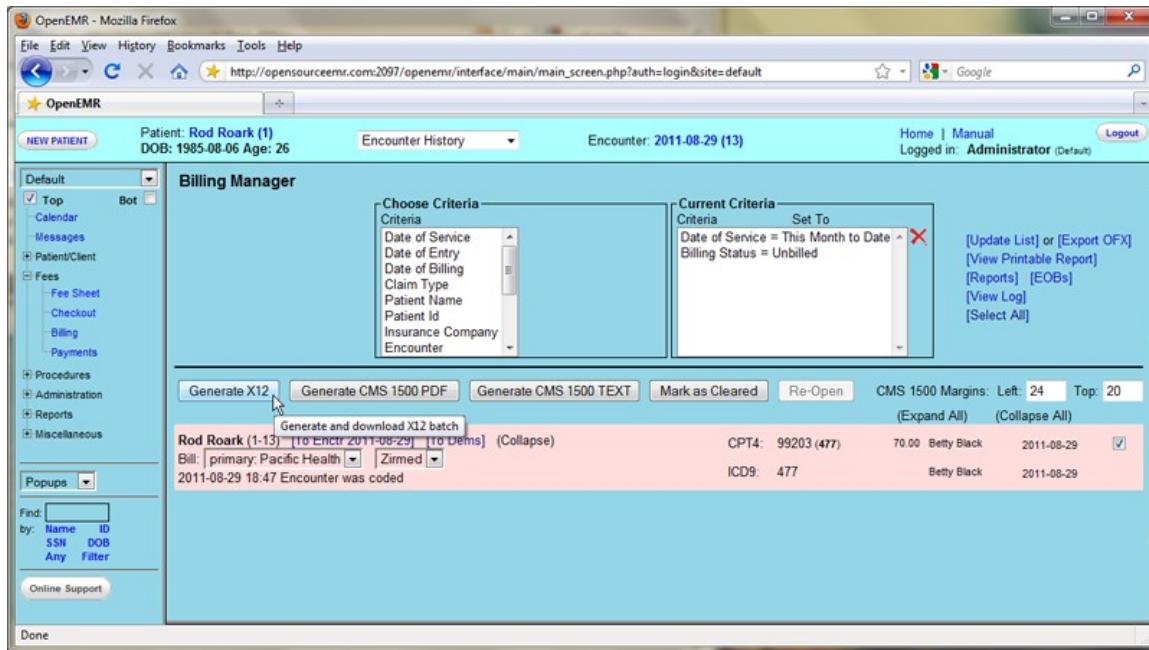


The list should now display all billables from the selected date range.



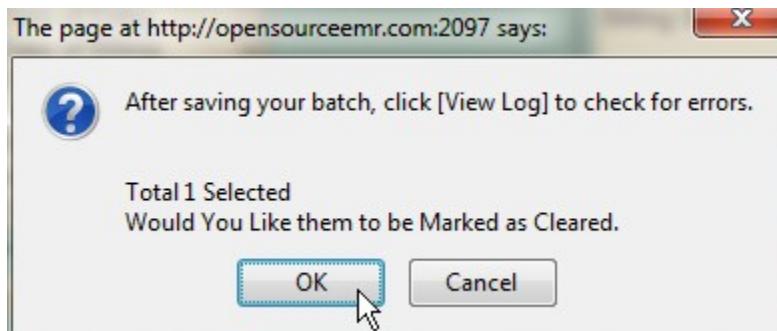
## Generating Claims

Clicking the checkbox to the right of the desired encounter will enable a set of buttons for generating claims. Your system should be configured with the appropriate set of forms for the insurance companies and clearinghouses used by your clinic. Selecting multiple encounters will allow you to generate batch files for many claims at once.



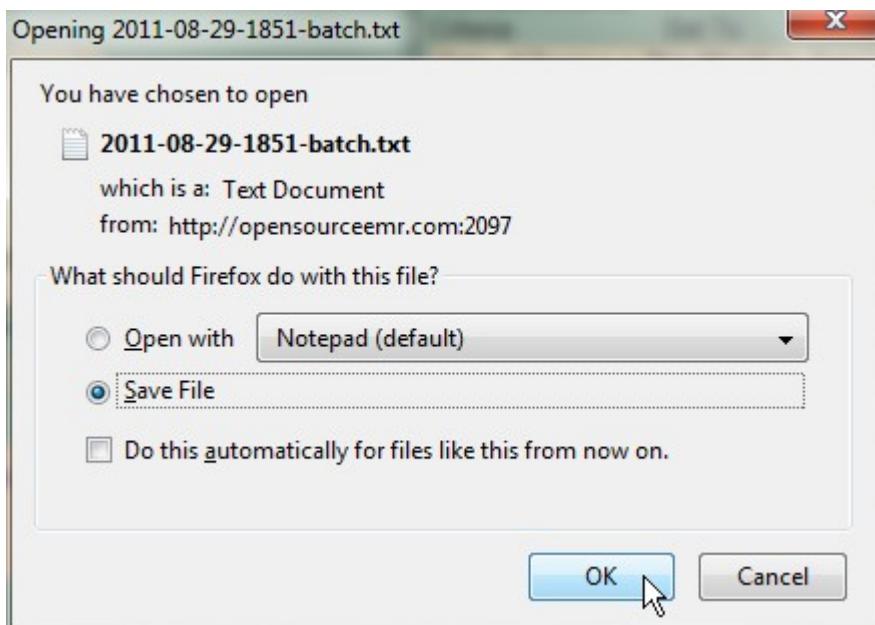
Click 'Generate X12' to create a claim file that is suitable for sending to the clearinghouse.

OpenEMR will present you with a confirmation popup, reminding you to check the log file after you have finished generating your claims.



Clicking 'OK' will mark this item as cleared, indicating that billing has been completed for this encounter.

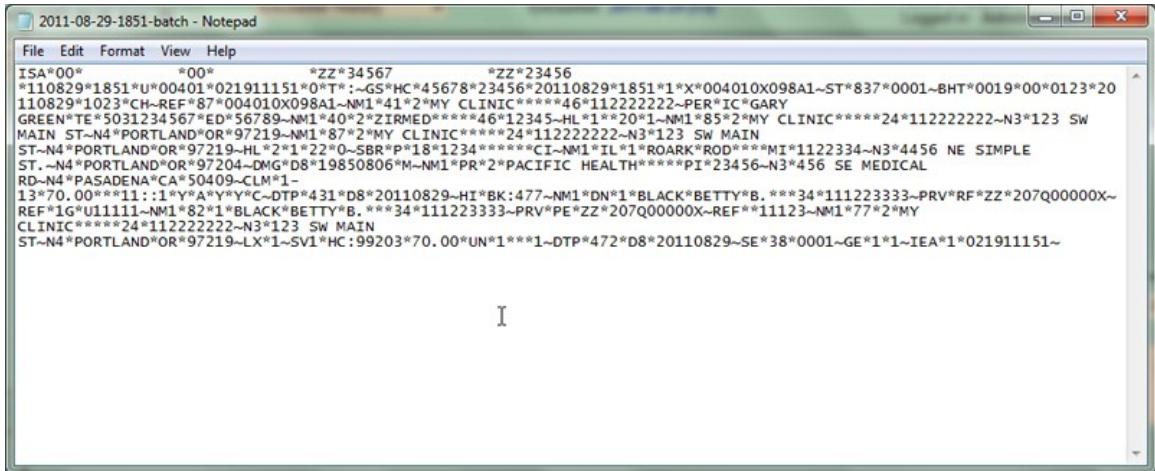
The standard Save File dialog should appear next, allowing you to save the generated batch file to your computer.



Once the file has been saved, click 'View Log' to check whether the claims were generated successfully.

If there were any errors in the claim generation process, they will be displayed here. Otherwise you will see a note indicating that the file was generated successfully.

The downloaded claim file should contain the necessary encounter information, formatted for billing. This is what will be sent to the clearinghouse, by whatever method has been specified.

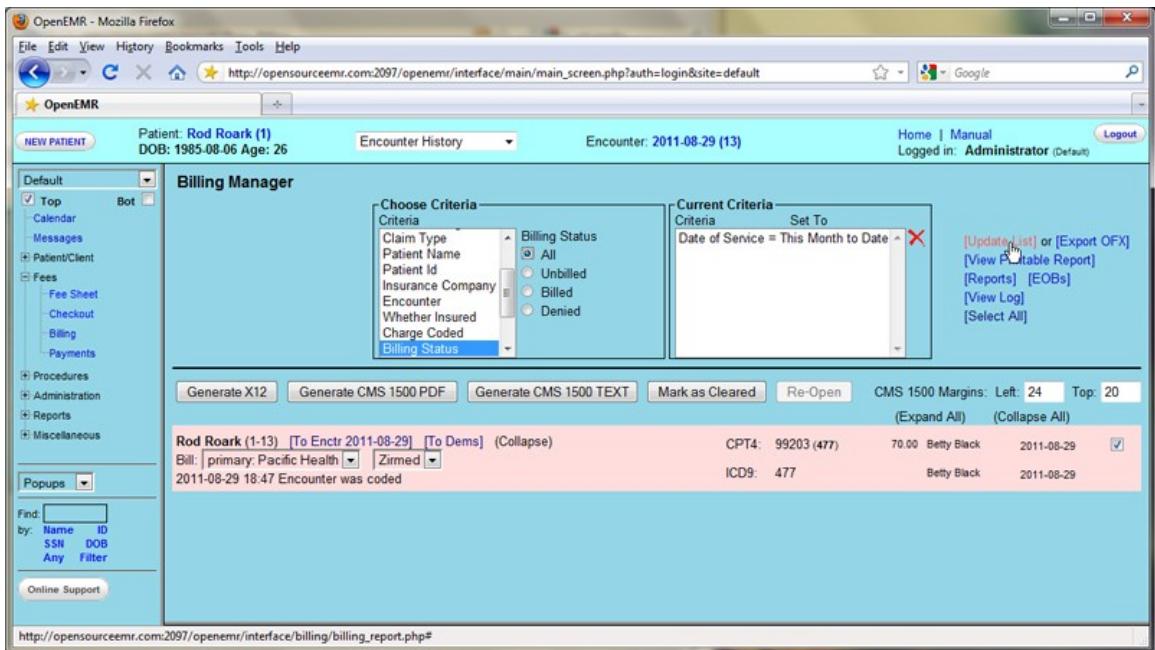


```

2011-08-29-1851-batch - Notepad
File Edit Format View Help
ISA*00* *00* *ZZ*34567 *ZZ*23456
*110829*1851*U*00401*021911151*0*T*:~GS*HC*45678*23456*20110829*1851*1*X*004010X098A1~ST*837*0001~BHT*0019*00*0123*20
110829*1023*CH~REF*87*004010X098A1~NM1*41*2*MY CLINIC****46*11222222~PER*IC*GARY
GREEN*TE*5031234567*ED*56789~NM1*40*2*ZIRMED****46*12345~HL*1*20*1~NM1*85*2*MY CLINIC****24*11222222~N3*123 SW
MAIN ST~N4*PORTLAND*OR*97219~NM1*87*2*MY CLINIC****24*11222222~N3*123 SW MAIN
ST~N4*PORTLAND*OR*97219~HL*2*1*22*0~5BR*D*18*1234*****CI~NM1*IL*1*ROARK*ROD***MI*1122334~N3*4456 NE SIMPLE
ST~N4*PORTLAND*OR*97204~DMG*D8*19850806*M~NM1*PR*2*PACIFIC HEALTH***PI*23456~N3*456 SE MEDICAL
RD~N4*PASADENA*CA*50409~CLM*1-
13*70.00**11:1*Y*A*Y**C-DTP*431*D8*20110829-HI*BK:477~NM1*DN*1*BLACK*BEETTY*B.***34*111223333~PRV*RF*ZZ*207Q00000X~
REF*1G*U11111~NM1*82*1*BLACK*BEETTY*B.***34*111223333~PRV*PE*ZZ*207Q00000X~REF*~1123~NM1*77*2*MY
CLINIC****24*11222222~N3*123 SW MAIN
ST~N4*PORTLAND*OR*97219~LX*1~SV1*HC:99203*70.00*UN*1***~DTP*472*D8*20110829~SE*38*0001~GE*1*IEA*1*021911151~

```

Select “Billing Status = Unbilled” in the ‘Current Criteria’ list and click the red X to remove it from the list, or select “Billing Status” under ‘Choose Criteria’ and select “All”. Click ‘Update List’ to refresh the billing list and see the updated status of the encounter.



**Billing Manager**

**Choose Criteria**

- Claim Type
- Patient Name
- Patient Id
- Insurance Company
- Encounter
- Whether Insured
- Charge Coded
- Billing Status

**Current Criteria**

Criteria	Set To
Date of Service = This Month to Date	X

[Updated List] or [Export OFX]  
[View Portable Report]  
[Reports] [EOBs]  
[View Log]  
[Select All]

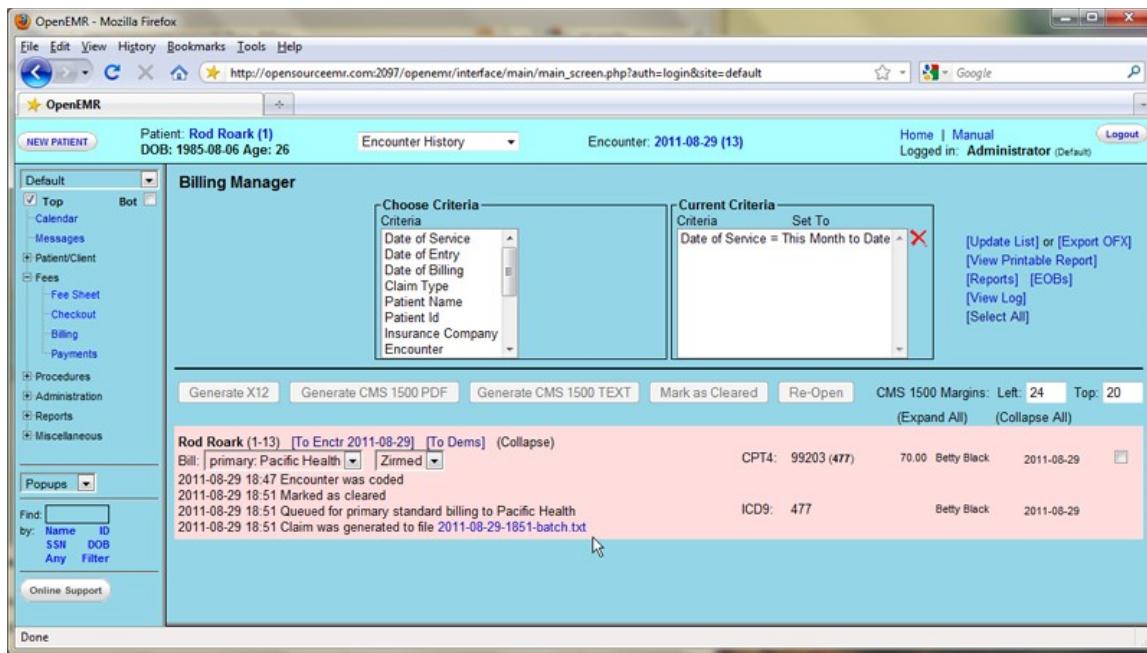
**Rod Roark (1-3) [To Enctr 2011-08-29] [To Dems] (Collapse)**

CPT4: 99203 (477) 70.00 Betty Black 2011-08-29

ICD9: 477 Betty Black 2011-08-29

Bill: primary: Pacific Health Zirmed  
2011-08-29 18:47 Encounter was coded

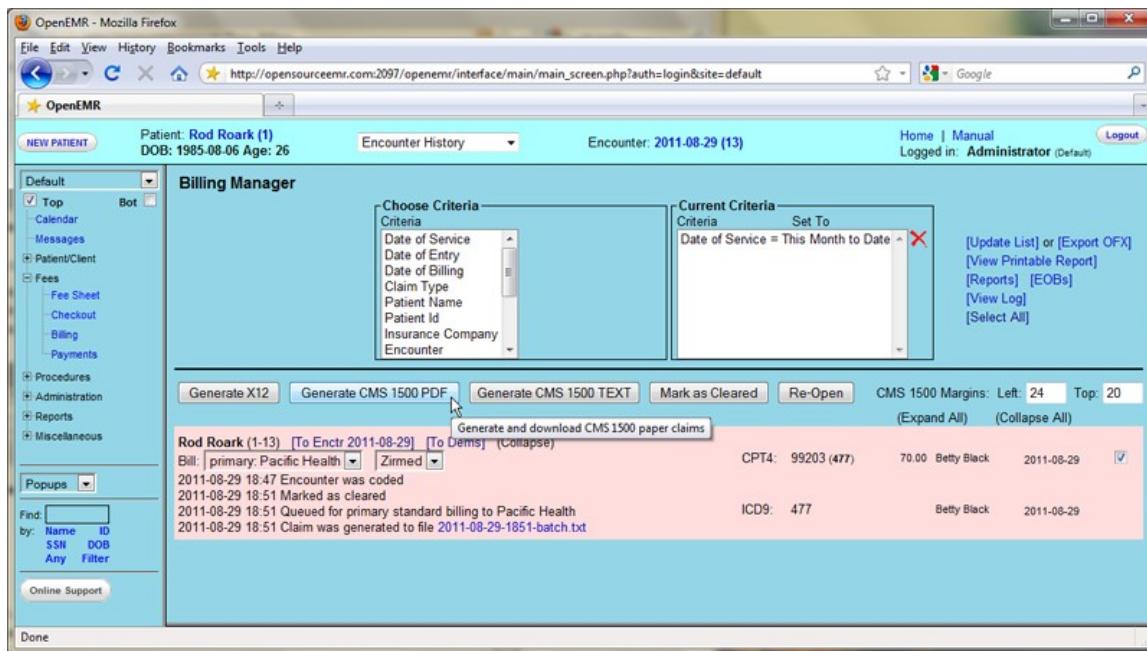
Click 'Expand' next to the desired Encounter to view its details.



## Generating HCFA Forms

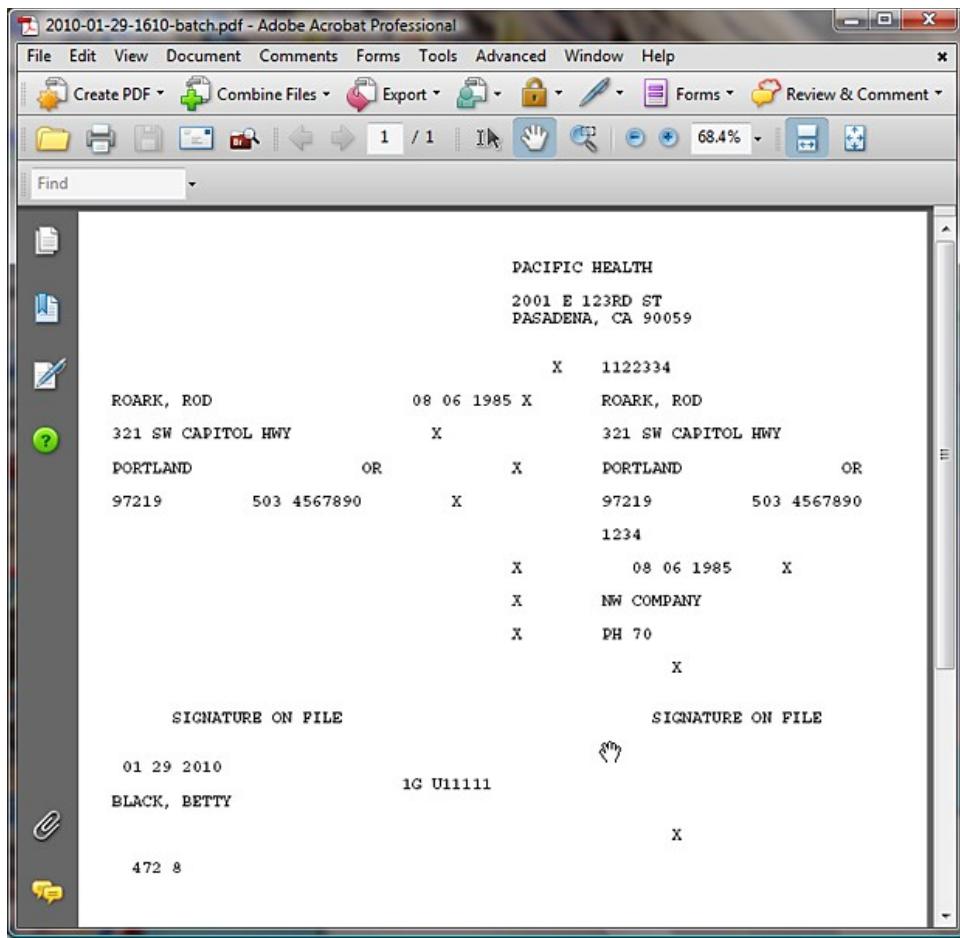
In OpenEMR multiple forms may be generated for each claim.

For example, re-enter the desired date range, be sure that 'Billing Status' is set to "All" and click 'Update List' again to show the current status of the claim. You can see that the claim has been "Marked as cleared."



Check the box to the right of the encounter and click 'Generate CMS 1500 PDF'.

OpenEMR will now generate a PDF of the HCFA claim, based on the standard HCFA form template. The new form can be viewed using a PDF viewer, or printed automatically on a pre-printed HCFA 1500 form, depending on your system's configuration.



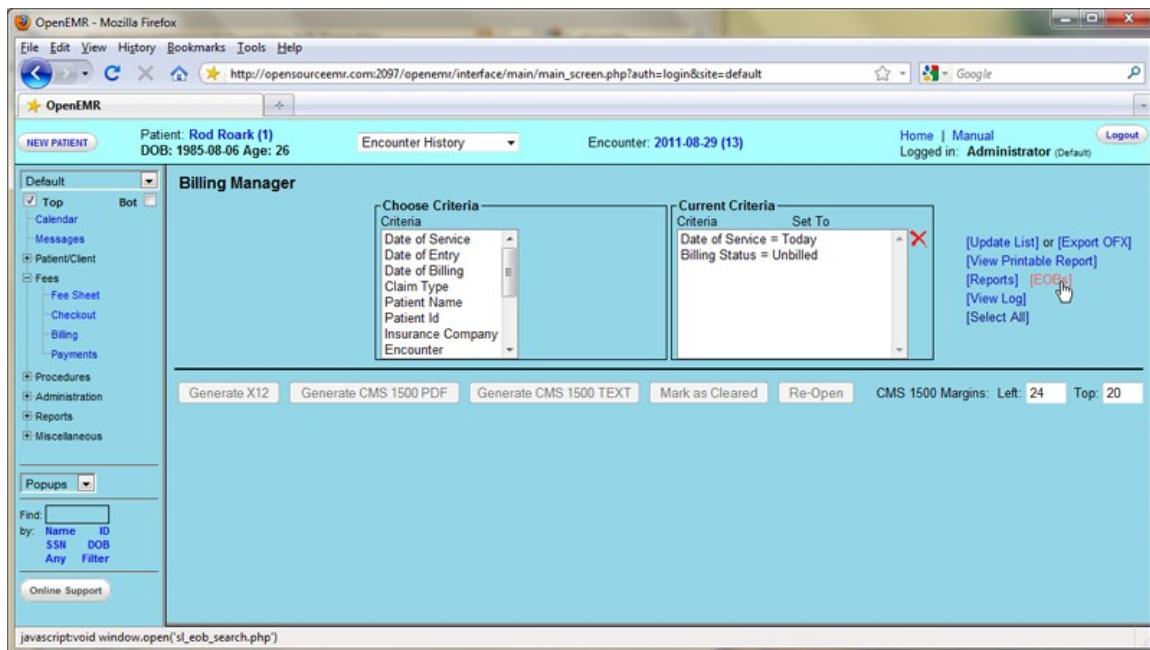
Returning to the Billing Report and clicking 'Update List', you can see that the status of the billable encounter has been updated.

## ACCOUNTING & RECEIVABLES

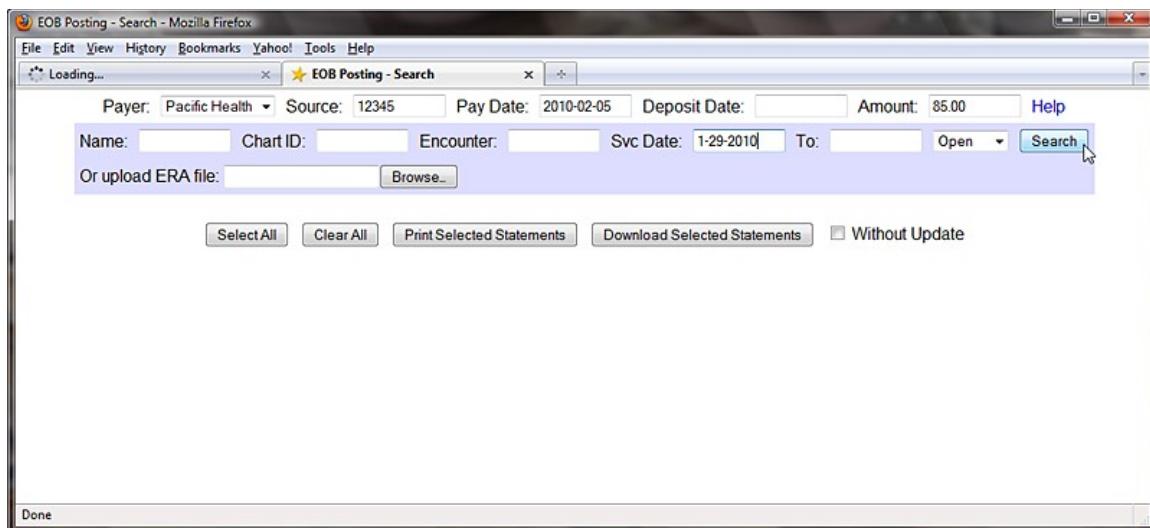
Users classified as Accounting or Administrator are also authorized to enter receivables for the clinic. Checks received from insurance companies can be entered here and distributed to cover the appropriate encounters. Patients can also be billed, and their payments recorded.

### Explanation of Benefits

To begin, select 'Fees - Billing' from the navigation menu and click 'EOBs' to bring up the Explanation of Benefits Search window. This is where you can upload an ERA file (click 'Help' in the upper right-hand corner for more information) or begin inputting payments manually.



At the top you may enter a source ( Eg. check number ), pay date and check amount. The 'Amount' field will be automatically decremented as payments are entered into the associated invoices. When all invoices have been completed this value should be zero.



The search fields, with the blue background, are for locating a specific invoice (or invoices). Enter the

appropriate parameters, such as the date of service, and click 'Search' to bring up a list of all invoices (claims) matching the requested parameters.

The screenshot shows a Mozilla Firefox browser window titled "EOB Posting - Search - Mozilla Firefox". The address bar says "OpenEMR" and the page title is "EOB Posting - Search". The search form includes fields for Payer (Pacific Health), Source (12345), Pay Date (2010-02-05), Deposit Date, Amount (85.00), and Help. Below the form is a table with columns: Patient, Invoice, Svc Date, Last Stmt, Charge, Adjust, Paid, Balance, Prv, and Sel. A row for "Roark, Rod" with invoice number "1.15" is selected, highlighted in blue. The "Charge" column shows "136.57" and the "Prv" column shows "-1". Buttons at the bottom include "Select All", "Clear All", "Print Selected Statements", "Download Selected Statements", and "Without Update".

The list shows the patient and invoice number, as well as the current balance to be paid. The number with a “-” in the 'Prv' column indicates the number of insurance companies for which this invoice is awaiting payment.

## Entering Payments

Clicking the invoice number you wish to work with opens the EOB Invoice window. Notice that the source and pay date from the previous window have been copied over; this saves time in the common case where a single check from the insurance company pays for multiple claims.

The screenshot shows a Mozilla Firefox browser window titled "EOB Posting - Invoice - Mozilla Firefox". The address bar says "OpenEMR" and the page title is "EOB Posting - Invoice". The form displays patient information (Rod Roark, Betty Black, Ins1: Pacific Health, Ins2: MedOne), invoice number (1.15), service date (2010-01-29), and payment method (None). It also shows last bill date (2010-01-29), posting for (Ins1), and check/EOB date (2010-02-05). A checkbox "Needs secondary billing" is checked, and a "Save" button is highlighted with a cursor. Other buttons include "Cancel" and "Deposit Date". Below the form is a table with columns: Code, Charge, Balance, By/Source, Date, Pay, Adjust, and Reason. A row for "99203" with charge "136.57" and pay "85" is shown. The "Reason" column has a dropdown menu with "W" selected.

The EOB Invoice page contains a detailed list of payments made on this invoice so far. Enter the payment amount next to the remaining balance, and check 'Needs secondary billing'. This will allow the claim to be rebilled to the secondary insurance. Select 'Done with Ins1' above to indicate that the primary insurance EOB has been posted. When you are finished, click 'Save'.

Once payment has been billed and received from secondary insurance, it can be entered in the same way. Enter the source and pay date, etc. and locate the appropriate invoice(s) using the search function.

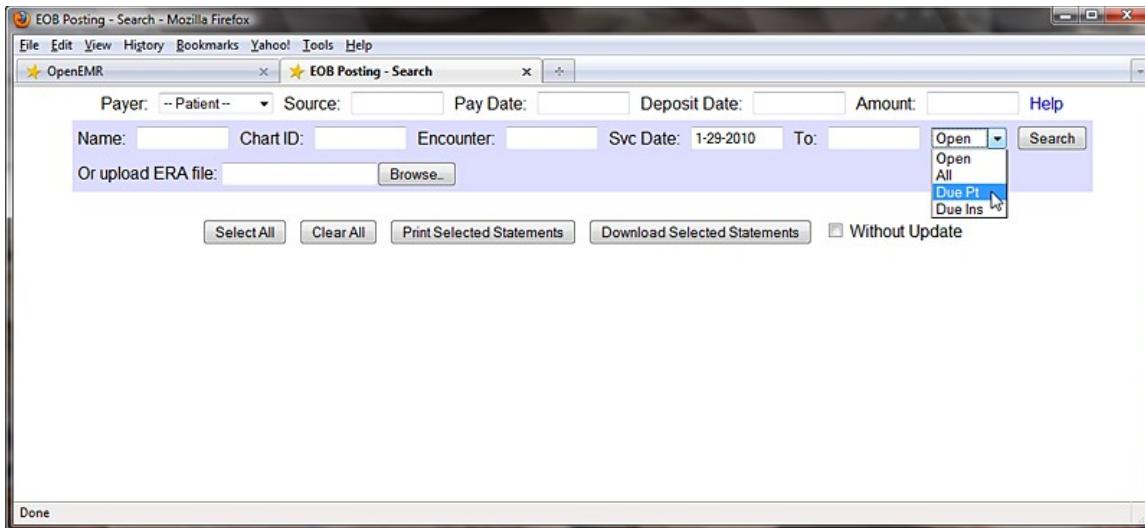
Payment amounts are now shown along with the remaining balance. The number in the 'Prv' column has also decreased. Select the invoice number to bring up the EOB Invoice window again.

Enter the payment amount and select 'Ins2' to indicate that the secondary insurance EOB has been posted.

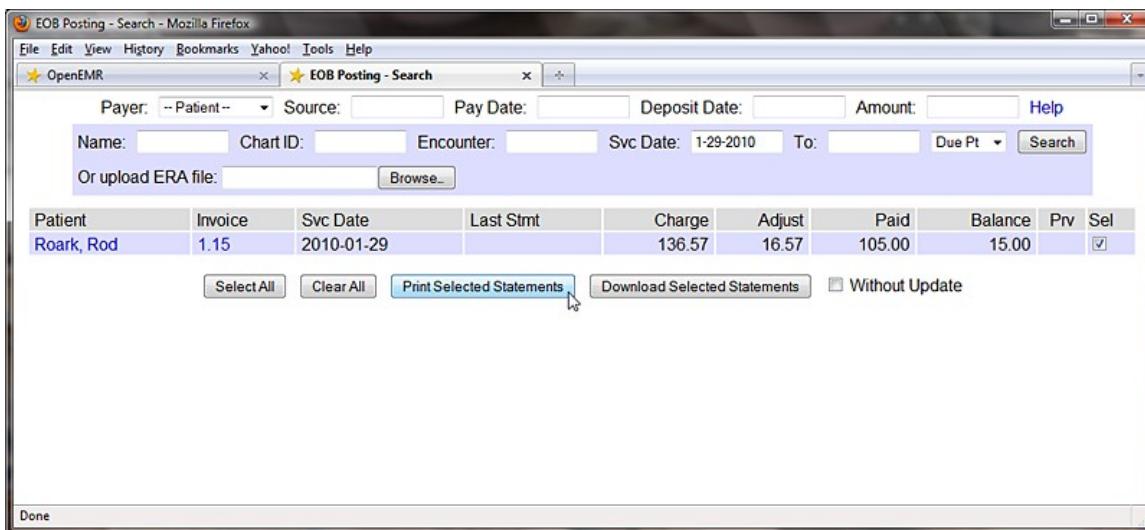
Invoice adjustments may also be made here. Enter the adjustment amount (or click 'W' to waive the entire remaining balance), and select a reason for the adjustment from the drop-down list provided. Click 'Save' when finished.

## Patient Invoices and Payments

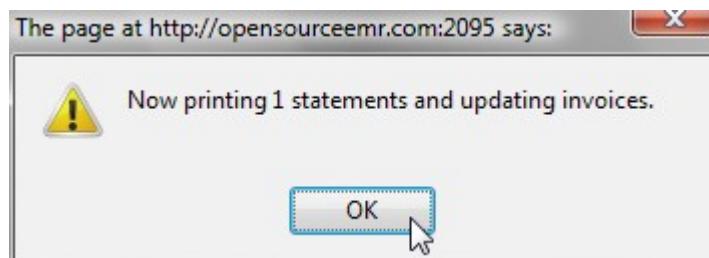
Once payments from the insurance companies have been received and entered, you can use OpenEMR's EOB page to generate invoices for billing patients the remaining amounts.



Select 'Due Pt' from the drop-down list and click 'Search' to display a list of all invoices that are awaiting payment from patients. Invoices still awaiting payments from insurance companies will not be shown.



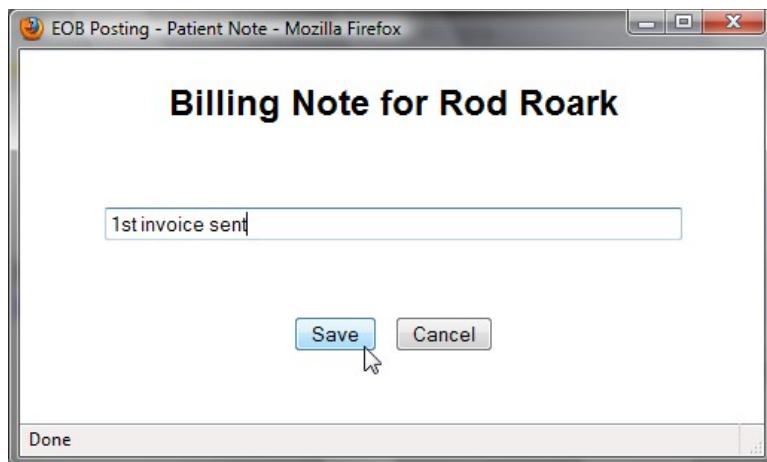
Check the box next to the desired invoice and click 'Print Selected Statements' to generate an invoice for that patient using a customizable template. Depending on your clinic's OpenEMR configuration, the invoice may be printed automatically.



A '1' in the 'Prv' column now indicates that the patient has been billed once for this claim. This number will

increment every time a new invoice is printed for this encounter. This is useful when printing so that second and later notices may be worded differently from the initial statement.

You can also click on the patient's name in the invoice list to create a billing note for that patient. Enter your note into the text field and click 'Save'.



Once payment has been received, it can be entered into the invoice in the same manner as the insurance payments. In the 'Now posting for' list be sure to select "Patient". Enter the payment amount as before and click 'Save'.

# REPORTING

Within OpenEMR there are a wide array of reports you can generate which may be useful for your practice. These include general reports such as appointment and encounter reports, billing reports, and patient specific reporting.

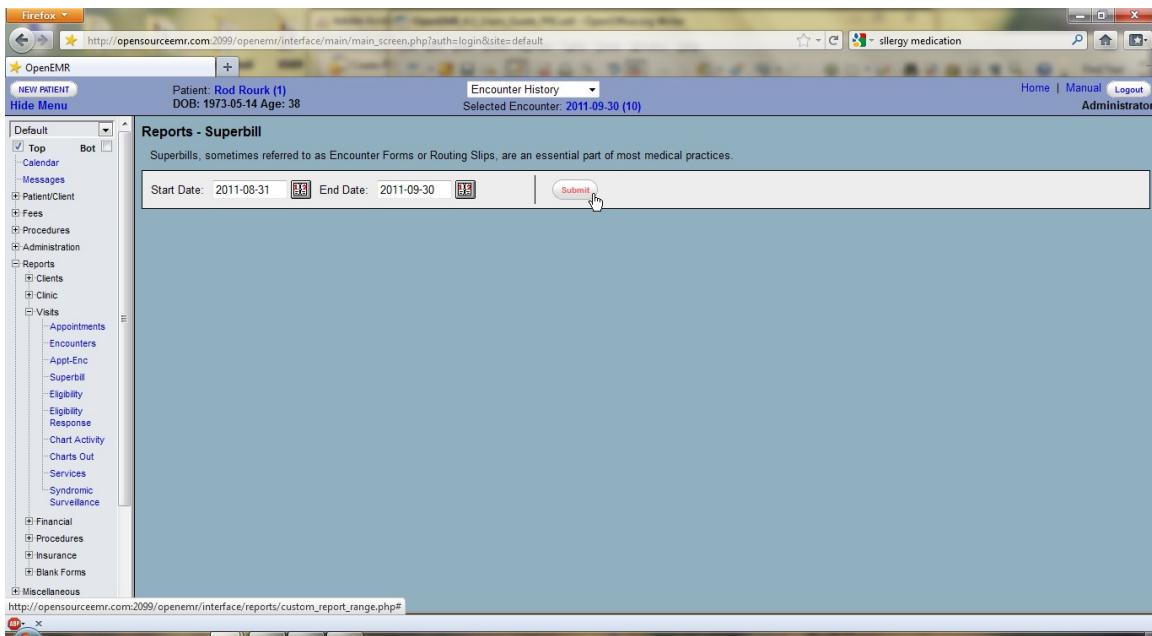
## General Reports

Most general reporting tools can be found by selecting 'Reports' from the navigation menu at left. In the Tree View scheme, the list of available reports is divided into a hierarchical list within the navigation menu.

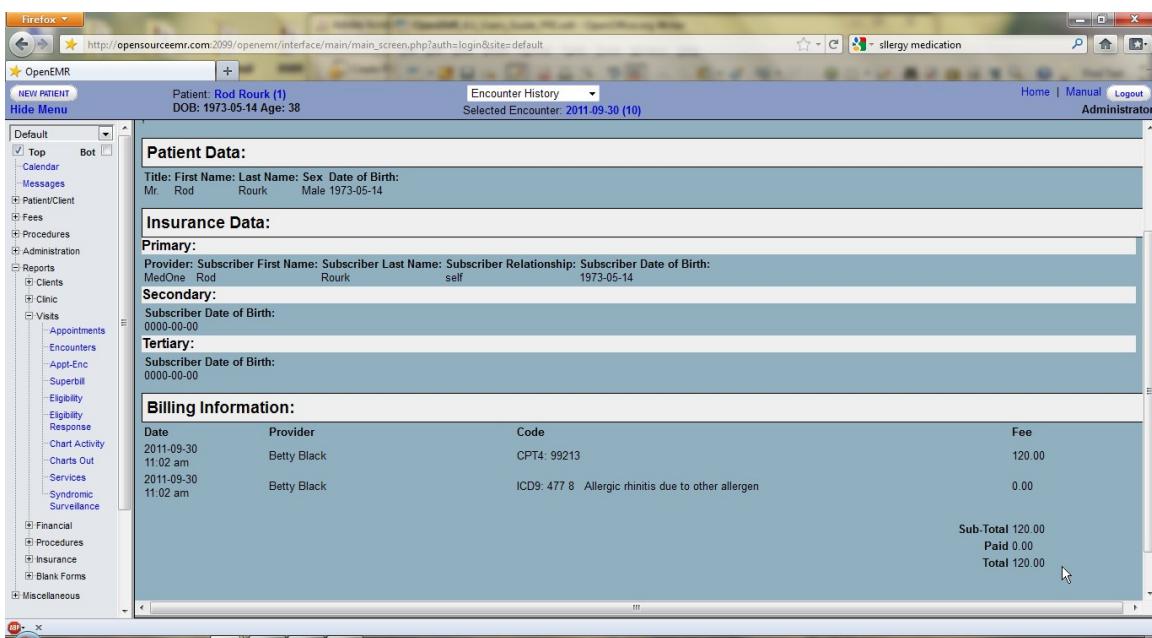
The screenshot shows the OpenEMR web application running in a Firefox browser. The URL is [http://opensourceemr.com:2099/openemr/interface/main/main\\_screen.php?auth=login&site=default](http://opensourceemr.com:2099/openemr/interface/main/main_screen.php?auth=login&site=default). The top navigation bar includes links for Home, Manual, Logout, and Administrator. The left sidebar contains a hierarchical navigation menu under 'Default'. Under 'Visits', the 'Superbill' option is highlighted with a red box and a cursor. Other menu items include Patient/Client, Fees, Procedures, Administration, Reports (Clients, Clinic), and Vists (Appointments, Encounters, Apt-Enc, Superbill, Eligibility, Eligibility Response, Chart Activity, Charts Out, Services, Syndromic Surveillance). The main content area displays a calendar for September 2011 with times 8:00, 8:15, 8:30, 8:45, 9:00, 9:15, 9:30, 9:45, 10:00, 10:15, 10:30, 10:45, and 11:00. Below the calendar is a 'Providers' section showing rates for All Users and Administrator. At the bottom, there is a 'Messages (See All)' section with a search bar for From, Patient, Type, Date, and Status, and buttons for Add New and Delete.

## Examples of Commonly Used Reports

Clicking 'Reports – Visits – Superbill' brings up the Superbill Report page. This presents you with a dialog for selecting a date range.



Clicking 'Submit' produces a report for each encounter in the date range, and shows patient demographics and insurance information, as well as the billing codes and amounts.



The Appointments Report ('Reports – Visits – Appointments') gives you a list of appointments for a given provider, or for all providers, in a specified date range. It can be sorted by clicking on any of the four column headings.

The Appointments and Encounters Report ('Reports – Visits – Appt-Enc') gives you a useful cross-reference of appointments with their corresponding encounters. This allows you to easily spot many types of errors, such as appointments with missing encounters, encounters with missing appointments, missing charges, and authorizations or justifications that are required but not done.

Practitioner	Date/Apppt	Patient	ID	Chart	Encounter	Charges	Copays	Billed	Error
Black, Betty	2011-09-30 10:00	Rod Rourk	1	1	10	120.00			Not billed
<b>Totals for Black, Betty</b>						1	120.00		
<b>Grand Totals</b>						1	120.00		

The Insurance Distribution report (listed under 'Reports – Insurance') shows you how many patients seen over a given time period use each kind of insurance.

**Report - Patient Insurance Distribution**

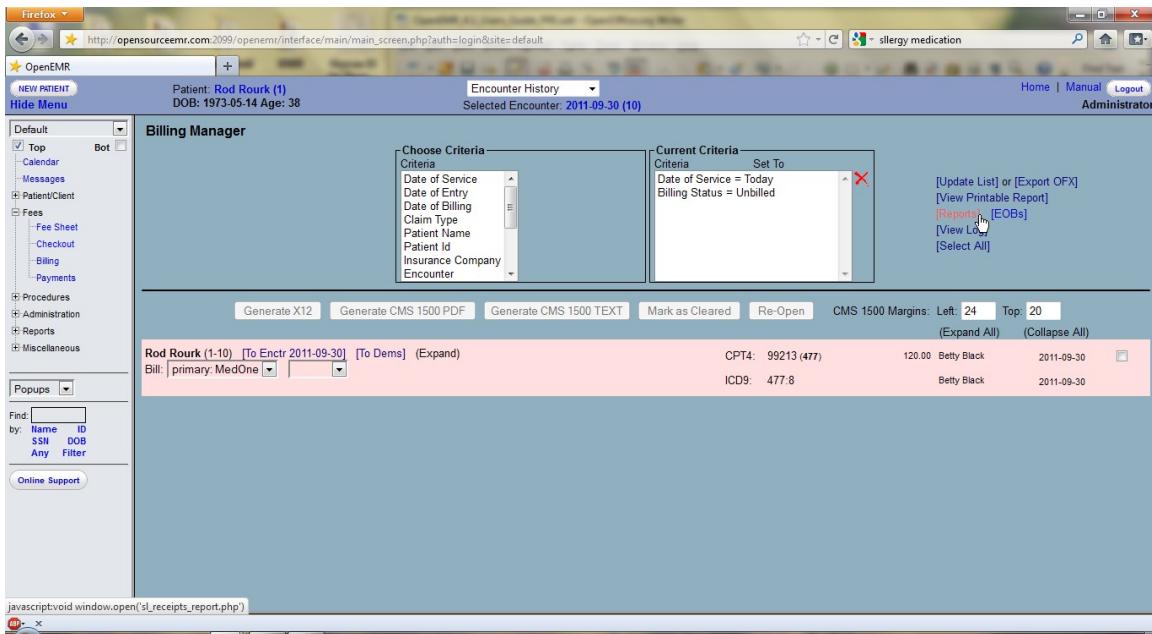
Primary Insurance	Charges	Visits	Patients	Pt %
MedOne	120.00	1	1	100.0

The Indigent Patients report lists all encounters for patients that were seen without insurance. (None shown here.)

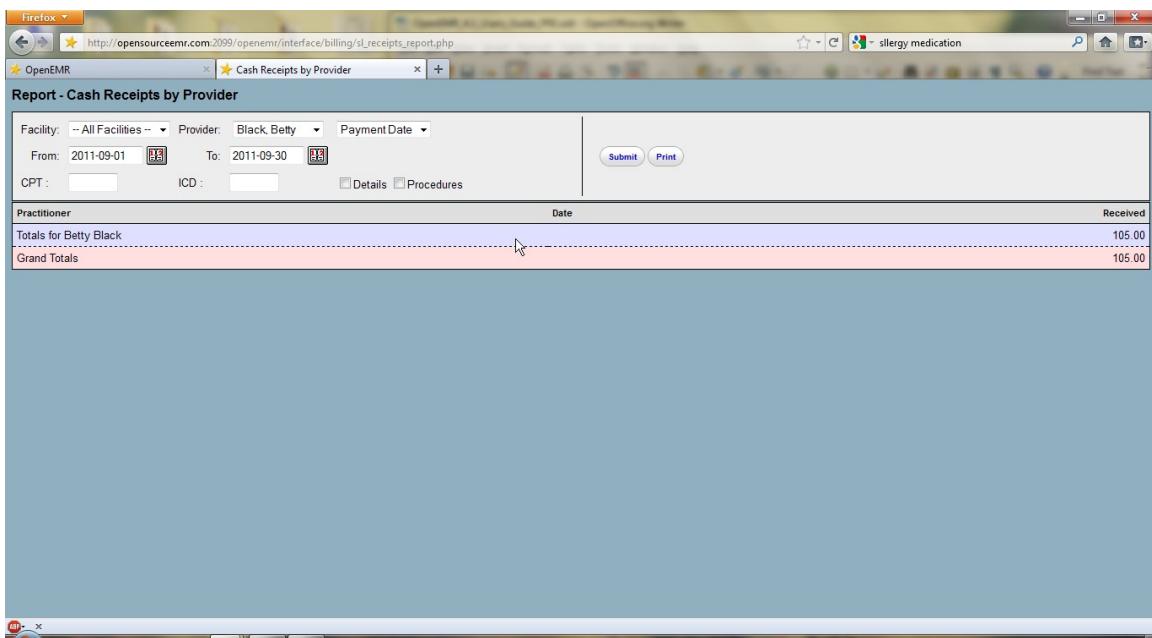
**Report - Indigent Patients**

Patient	SSN	Invoice	Svc Date	Due Date	Amount	Paid	Balance

## Billing Reports



From the main Billing page click 'Reports', or select 'Reports – Financial – Cash Rec' from the navigation menu.



This is the Cash Receipts report. It breaks down gross income by provider for a given time period.

The user can also elect to see a detailed breakdown of cash receipts, itemizing each procedure for which a charge was made.

**Report - Cash Receipts by Provider**

Practitioner	Date	Invoice	Procedure	Prof.	Clinic
Betty Black	2011-09-30	1.10	99213	50.00	
	2011-09-30	1.10	99213	45.00	
	2011-09-30	1.10	99213	10.00	
<b>Totals for Betty Black</b>				<b>105.00</b>	
<b>Grand Totals</b>				<b>105.00</b>	

## Patient Reports

**Rourk, Rod**

History | **Report** | Documents | Transactions | Issues

**Billing (expand)**

**Vitals (collapse)**

No vitals have been documented.

**ID Card/Photos (expand)**

**Clinical Reminders (collapse)**

Measurement: Weight (*Past Due*)  
Assessment: Tobacco (*Past Due*)

**Appointments (collapse)**

Friday, 2011-09-30  
10:00 am Established Patient  
Betty Black

**Medical Problems (collapse)**

asthma

**Allergies (collapse)**

penicillin

**Medications (collapse)**

Claritin D

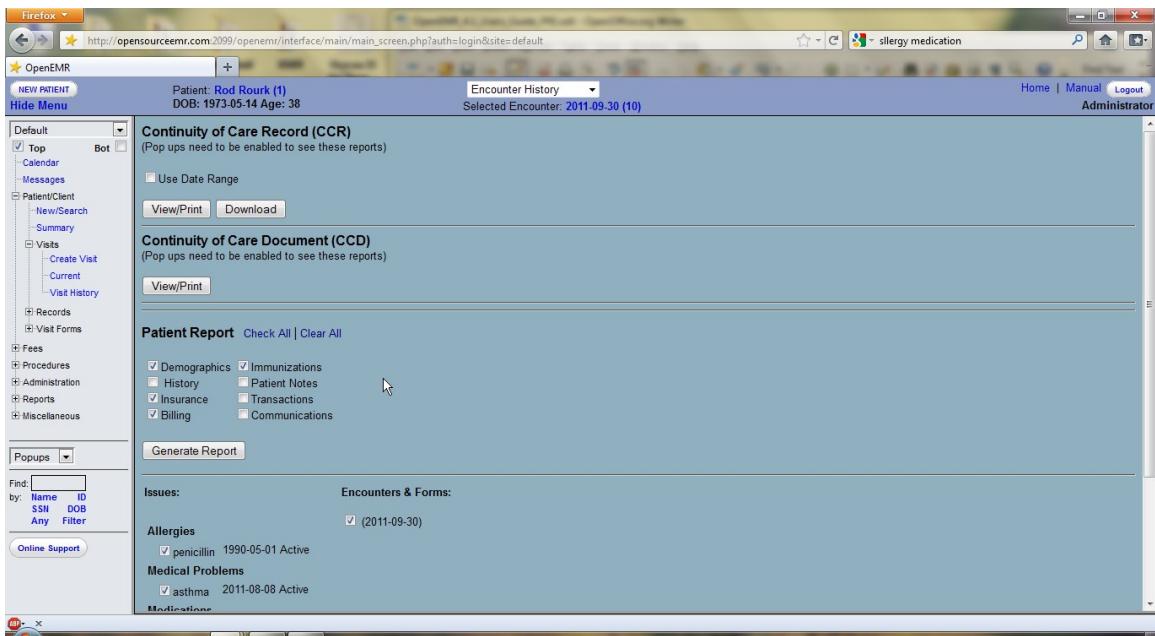
**Immunizations (collapse)**

2011-09-30 - Hep B, adult

**Prescription (collapse)**

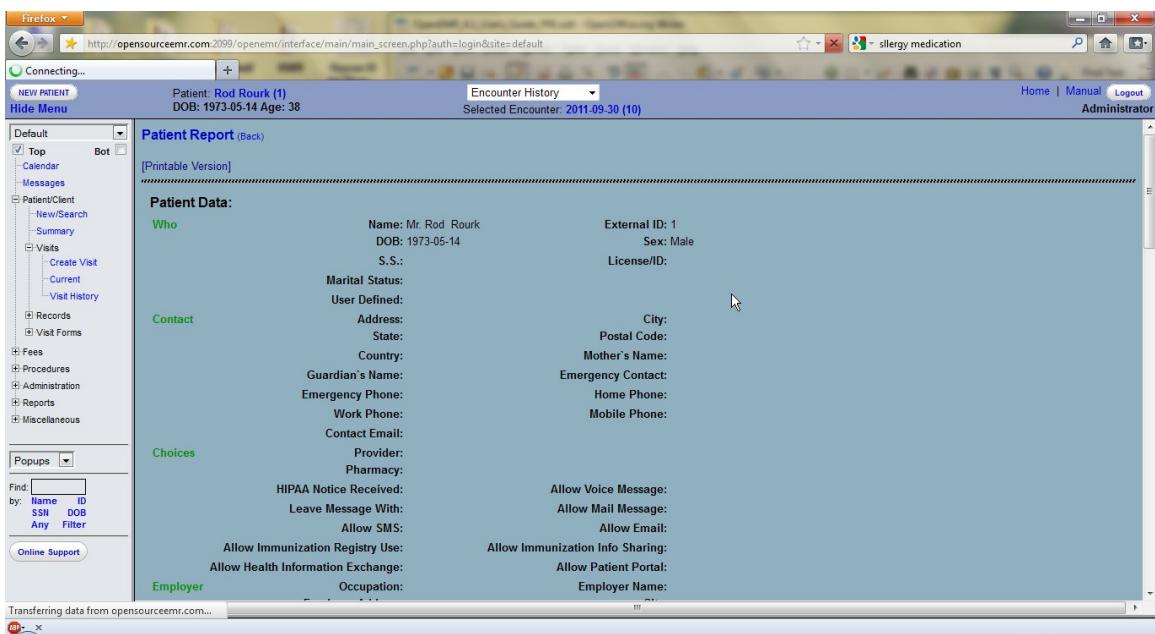
Claritin D

When a patient is active within the system, the user has the option of generating a report for that specific patient. To do so, click on 'Report' at the top of the Patient Summary page.



The user can choose to include or omit a wide variety of patient information. When satisfied with your selections, click 'Generate Report'.

This produces a report including all the specified patient information.



Firefox http://opensourceemr.com:2099/openemr/interface/main/main\_screen.php?auth=login&site=default

OpenEMR

Patient: Rod Rourk (1)  
DOB: 1973-05-14 Age: 38  
Encounter History  
Selected Encounter: 2011-09-30 (10)

Home | Manual Logout Administrator

Default Top Bot

Insurance Data:

Primary Insurance Data:  
Provider: Subscriber First Name: Subscriber Last Name: Subscriber Relationship: Subscriber Date of Birth:  
MedOne Rod Rourk self 1973-05-14

Secondary Insurance Data:  
Subscriber Date of Birth:  
0000-00-00

Tertiary Insurance Data:  
Subscriber Date of Birth:  
0000-00-00

Billing Information:  
2011-09-30 : (CPT4) 99213 -  
2011-09-30 : (ICD9) 477 - Allergic rhinitis due to other allergen

Patient Immunization:  
2011-09-30 -

Issues

Allergies:  
penicillin:

Medical Problems:  
asthma:  
[Diagnosis]

Find: by: Name ID SSN DOB Any Filter Online Support

Firefox http://opensourceemr.com:2099/openemr/interface/main/main\_screen.php?auth=login&site=default

OpenEMR

Patient: Rod Rourk (1)  
DOB: 1973-05-14 Age: 38  
Encounter History  
Selected Encounter: 2011-09-30 (10)

Home | Manual Logout Administrator

Default Top Bot

Medications:  
Claritin:

New Patient Encounter  
(2011-09-30) Provider: Betty Black  
Reason:  
Facility: Your Clinic Name Here  
Procedure: 99213

Document 'PDX\_Member\_ID\_Card.pdf'

**MEMBER IDENTIFICATION CARD**  
PPC PDX Cooperative  
P.O. Box 230609  
Tigard, OR 97281

Name: \_\_\_\_\_

Member ID# \_\_\_\_\_ PID# \_\_\_\_\_ Effective Date: \_\_\_\_\_

Selected Provider: \_\_\_\_\_ Phone: \_\_\_\_\_

Benefits:  PPC Co-op Membership  Primary Care Services  
 Patient Advocacy  Discounted healthcare services from

Find: by: Name ID SSN DOB Any Filter Online Support