OpenEMR - An Easy to Use Guide

for Front Office Receptionist

Registration, Scheduling, Billing with OpenEMR?

We make your life easy….

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Introduction

About This Manual

Purpose

The OpenEMR for Front Office is getting more and more powerful and flexible. Therefore we tried to address all the possibilities of the software. However its usage may differ for the individual healthcare providers according to their organization, prior knowledge of the staff member and similar circumstance. This user manual will replace an intensive training onsite, but shall be considered as an additional support.

Intended Audience

This manual is primarily intended for Front Office staff of Healthcare organization whose uses OpenEMR.

Prerequisites for Use

The following are the prerequisites:

Functional – Basic understanding of Healthcare terms and operations carried out in hospitals.

Technical - Basic understanding of computers and data entry operations.

Introduction to OpenEMR

OpenEMR is a Free and Open Source electronic health records and medical practice management application. It is ONC Certified and it features fully integrated electronic health records, practice management, scheduling, electronic billing, internationalization, free support, a vibrant community, and a whole lot. It can run on Windows, Linux, Mac OS X, and many other platforms.

Features

- ✓ Advanced scheduling allows clinics to create repeating events, automated workflows triggered by check-in and patient reminders.
- ✓ E-prescription was entered into an encounter and have it electronically sent to the patient's pharmacy.
- ✓ Export billing data in standardized X12 format.
- ✓ Generate CMS Meaningful Use reports with just a few clicks.
- ✓ Have lab orders automatically sent to a lab and integrate the result into a patient's chart automatically.
- ✓ Navigate complex patient algorithms using the clinical decision rules engine to ensure the highest quality of care for patient.

- ✓ HIPAA-friendly, fine-grained access control objects, and industry-standard password hashing helps to protect your practice from intrusion.
- ✓ Available in over 30 languages and customizable to add more.

Getting Started

Install OpenEMR 5.0.0 in your healthcare practice and you are set to explore the new world of digital healthcare. In web browser, enter the URL for the OpenEMR access and your OpenEMR credentials to login as provided by your administrator.

Figure 1: Login Screen

Logging in OpenEMR as receptionist, takes you to the main landing page. This screen shows the schedules and appointments of all the practitioners at the clinic.

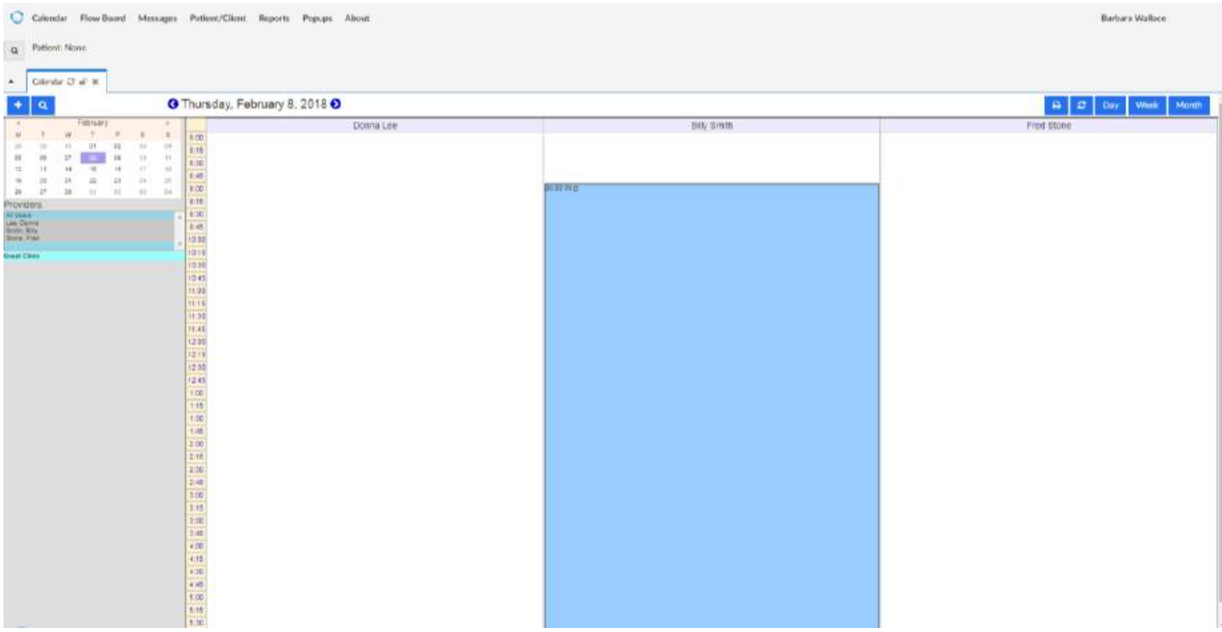

Figure 2: Dashboard

Scheduling

Setting up Provider Schedules

Is it the first time you started scheduling in OpenEMR? If YES, you will need to set up schedules for all the practitioners.

To do this, select a provider from the 'Providers' list on the left for whom you would like to set up a schedule. Next, click the time at which that provider is scheduled to enter office.

Figure 3: Selecting provider name and time

Clicking on the time in the Calendar page will display an 'Add New Event' dialog box. Refer the screen below.

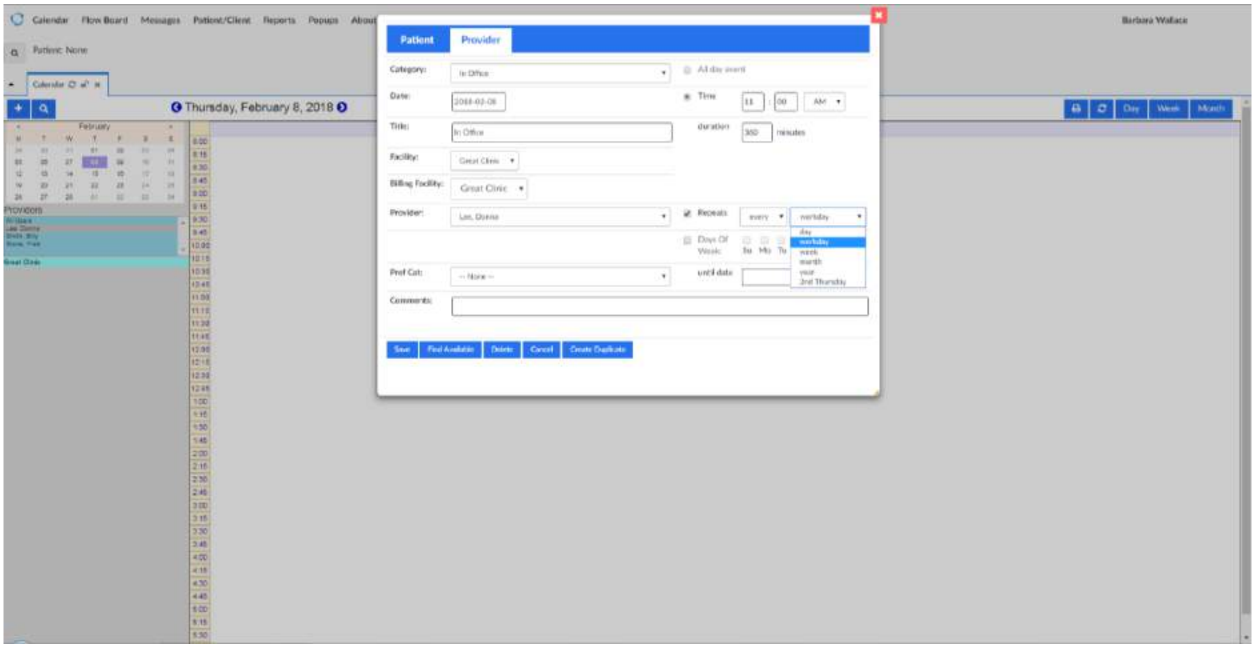

Figure 4: Setting provider appointment.

The Facility (Clinic) and provider name will be automatically filled, as well as the time that you selected.

Click the 'Provider' tab and choose "In Office" from the 'Category' drop-down list. Enter the duration for the category selected, for example 360 minutes which intimates provider will be available for 6 hours from 11:00 AM.

If the Provider visits the clinic on every business day, you can 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. Make sure to select an end date later than the select date for repeated events to occur in the 'Until' field. Once you have finished click

'Save' to update the calendar.

Note: Repeat the same process to set up different schedules for a provider such as: Lunch, Out of Office, Vacation and Reserved.

Figure 5: Provider Appointment screen

In the above screen, the provider was set in office between 11:00Am to 6:00 PM in which 1:00PM-2:00PM was assigned as lunch.

Scheduling Appointment - New patient

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

When a new patient calls you for the appointment, select the provider from providers list in the left and click on the time specified by the patient on call. Refer *Figure 3*.

In “Add New Event” dialog box, select the “Category” as “New Patient” and click on the “Patient” field. Search for the patient name and if search returns null, you will get a link “Click here to add new patient”. Click on the link and you will be taken to “Search or Add Patient” screen.

Note: Searching for a patient by name means their surname and not their first name.

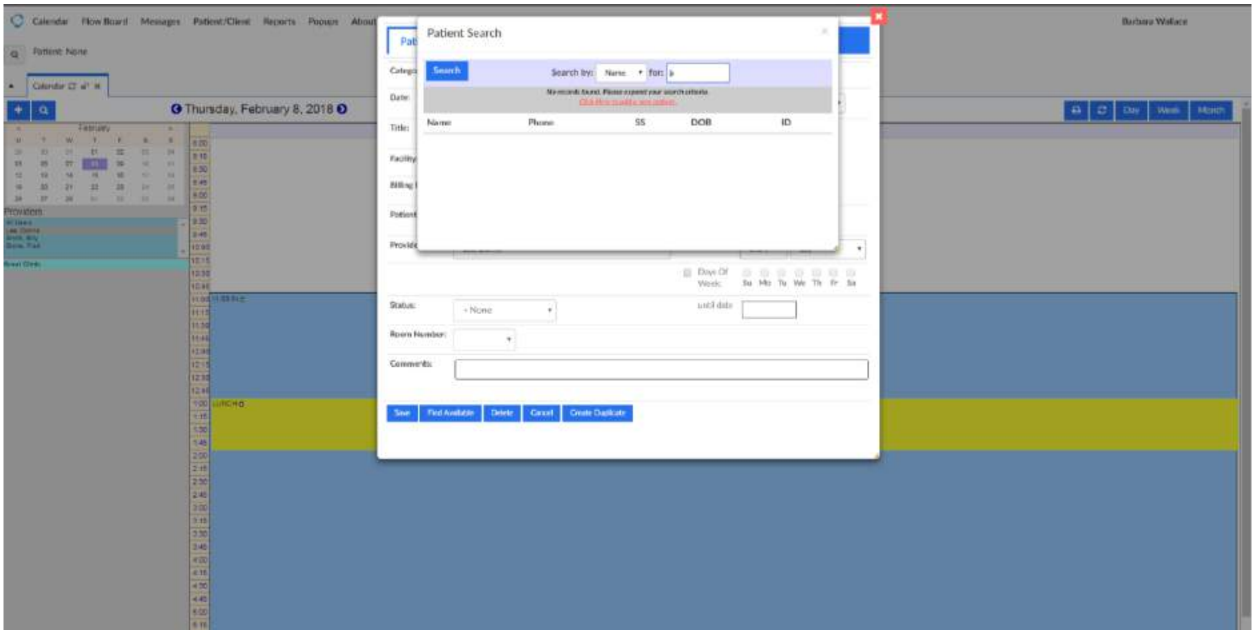

Figure 6: Setting Appointment for a new patient

Click “Click here to add a new patient” for adding new patient.

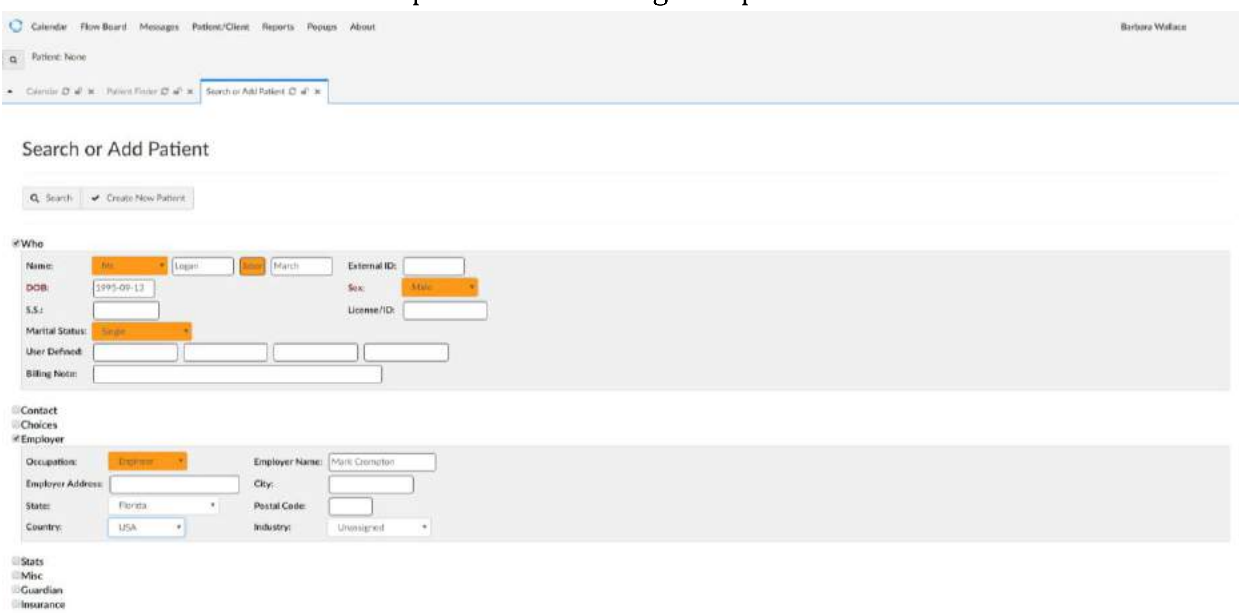

Figure 7: Adding new patient

Patient Name, Date of Birth and Sex are mandatory fields to create a new patient. If you have an existing chart for this patient, you may enter the chart number under 'External ID', If not the system will take care of this. Enter all the required information and click on ‘Create New Patient’. This will display a pop up box that shows if there is an existing patient or not after you create a new patient. Clicking on ‘Confirm Create New Patient’ will takes you to the Patient Summary page. Refer *Figure 8*.

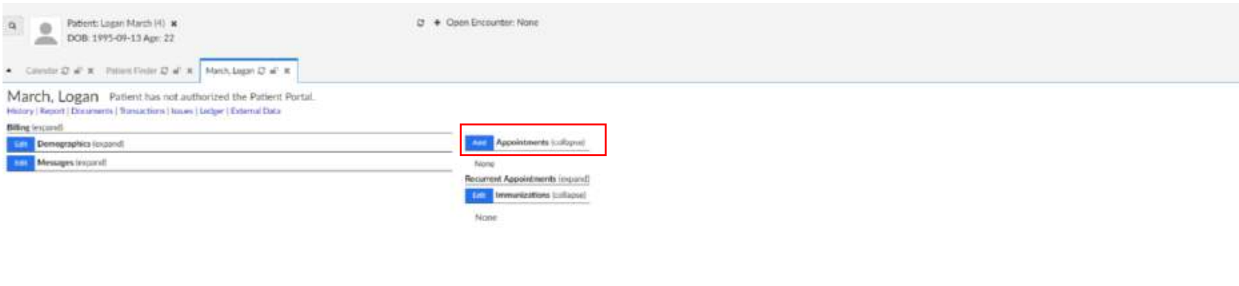

Figure 8: Patient Summary

The right-hand side of the Patient Summary shows Patient Appointments. Click 'Add' to schedule an appointment for that patient.

This will present you with the same Add New Event dialog used earlier. “Office Visit” is selected as the Category by default. If a primary provider has been entered for that patient, they will be selected automatically.

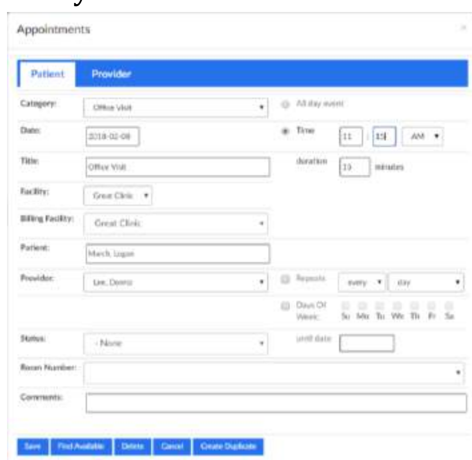

Figure 9: Adding Appointment

Click 'Find Available' to see a list of appointment times available for that provider for the next 7 days. 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.

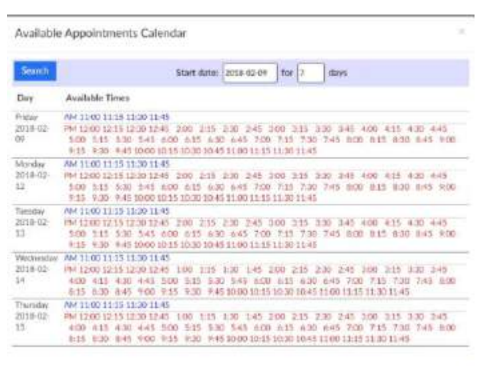

Figure 10: Finding Available time

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.

Verify patient's DOB by mouse over the patients name in created appointment.

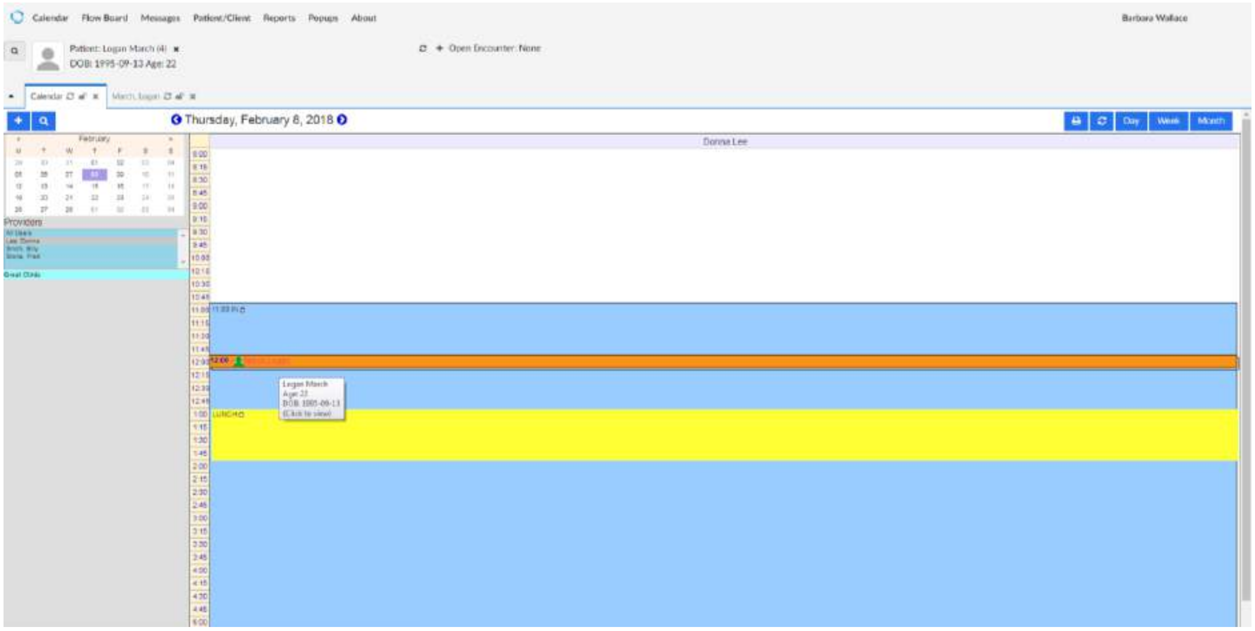

Figure 11: Calendar of Provider with Patient Details.

Note: Adding a new patient can also be done by clicking on either of the two links available in the main landing page. Go to Patient/Client -> New/Search in the top navigation menu for adding new patient.

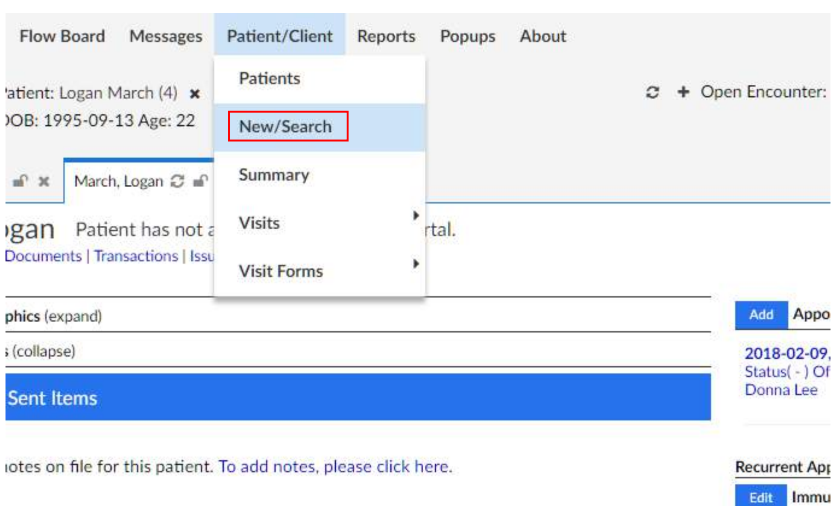

Figure 12: Adding new patient.

Scheduling Appointments – Existing Patient

To create an appointment for an existing patient, go to the Calendar link in the navigation menu. The calendar shows a list of appointments scheduled for the practitioners available in the clinic. Now, fix an appointment for a patient by clicking on the time slot next to the corresponding Practitioner.

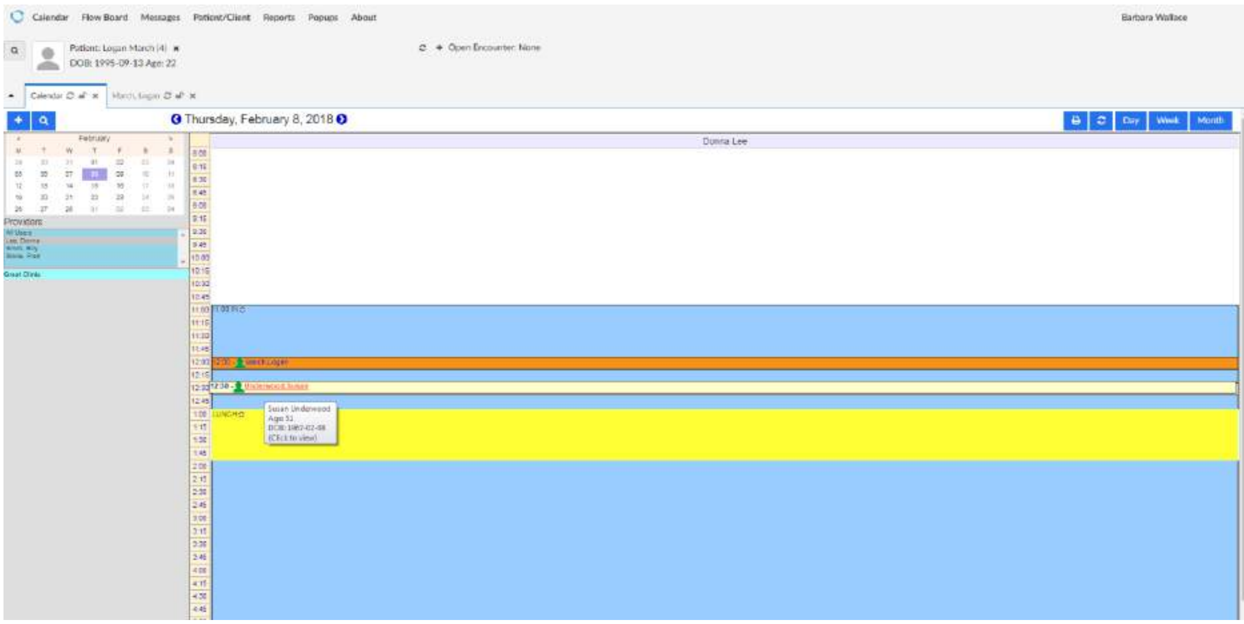

Figure 13: Adding appointment for existing user

This will present you with the same Add New Event dialog used earlier. You can change the category to “EstablishedPatient”. Select the patient from ‘Patient’ field and enter all the required details and click on ‘Save’.

Appointment Status

If the patient has arrived at your clinic or cancelled the appointment, you can change the patient appointment status to the appropriate one by selecting from the drop down list as shown below.

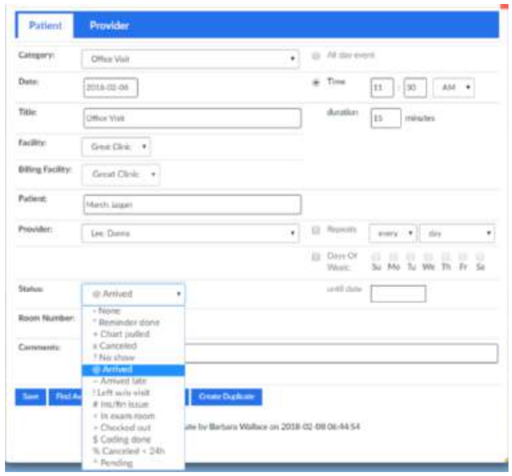

Figure14: Changing Appointment Status.

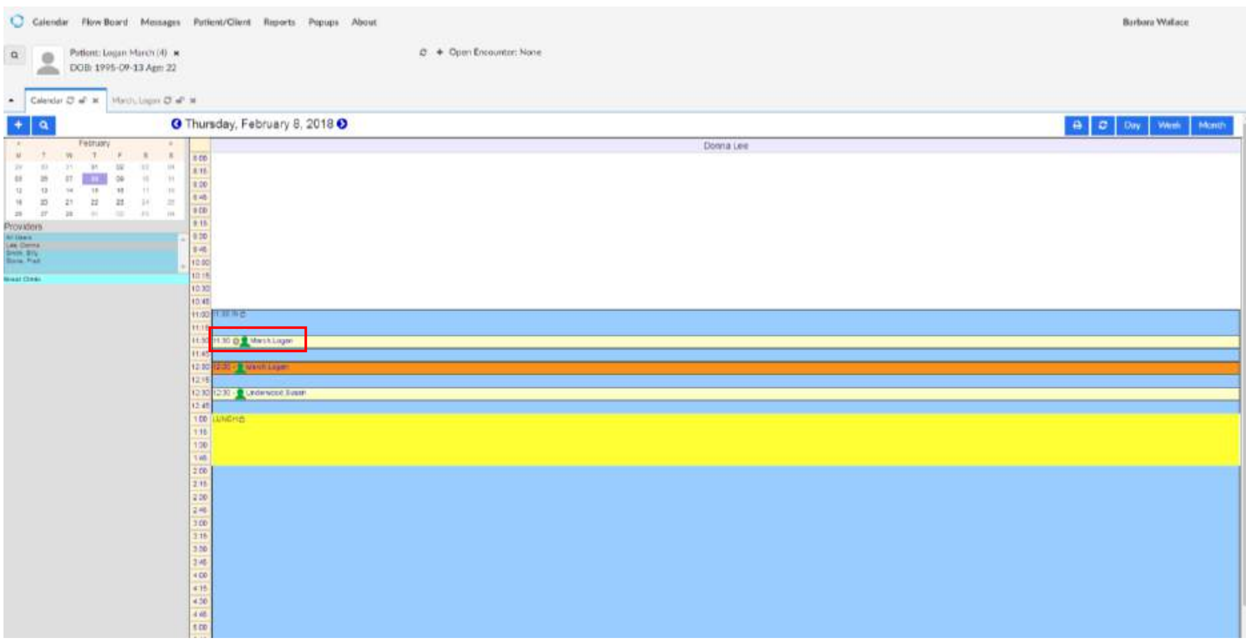

Figure 15: Appointment Status.

You can also type a note into the 'Comments' line if more information is needed. Click 'Save' to update the status of the appointment. You can see that the symbol next to the appointment time has changed to indicate its new status. Any comments are now also visible when you mouse over the patient's name on the appointment calendar.

Patient Profile

Patient Demographics

To enter detailed demographic information of a patient, Select the patient and click on 'Edit' next to the Demographics section. This will bring up a series of tabs containing inputs for the various types of patient data.

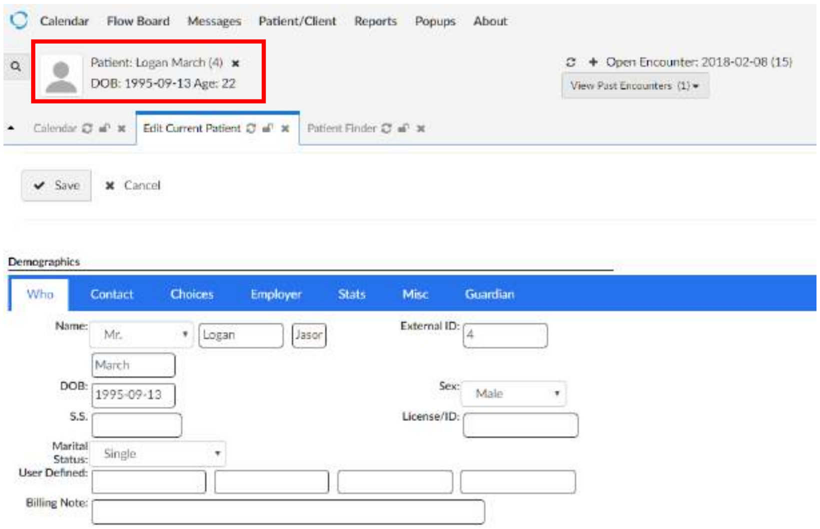

Figure 16: Patient Demographics

Click on the tab for the section you would like to work with and fill in the desired information in the fields.

Who – The fields under this tab allows medical receptionist to collect patient related information like: Name, DOB, Sex, and Marital Status etc.

Contact – The fields under this tab allows medical receptionist to collect patient contact information's like:

Address, Phone Numbers, Email ID, Mother/Guardian name.

Choices – The fields under this tab allows medical receptionist to enter the provider details, message details and portal details for that particular patient.

Employer – The fields under this tab allows medical receptionist to collect employer details of that patient.

Stats– The fields under this tab allow medical receptionist to collect patient statistics like: Language, Race, Income, Family size etc.

Misc –Allows medical receptionist to collect other information related to the patient.

Patient Insurance

To enter Insurance information for a patient click on 'Edit' next to the Insurance section. This will bring up a series of tabs containing inputs for the various types of insurances.

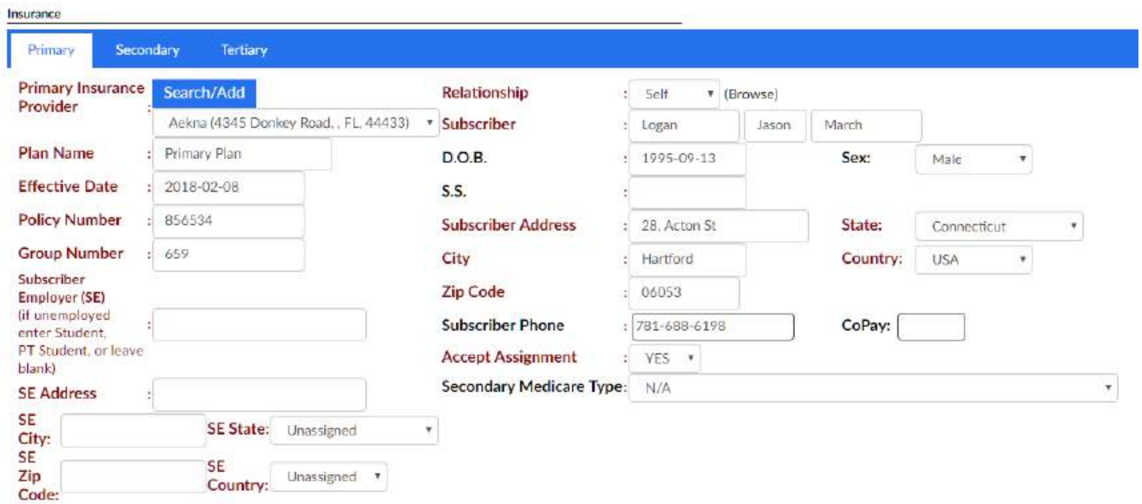

Figure 17: Patient Insurance details

Click on the tab for the section you would like to work with and fill in the desired information in the fields. Note that fields labeled in red are required in order for billing to work properly.

You can add a new insurance company or search for an already existing insurance company by clicking on 'Search/Add' button next to the Insurance Provider.

Click on save once the required insurance information is provided. This takes you back to the Patient Summary page. All the patient details entered will be displayed in the Patient Summary page as shown in the screen below.

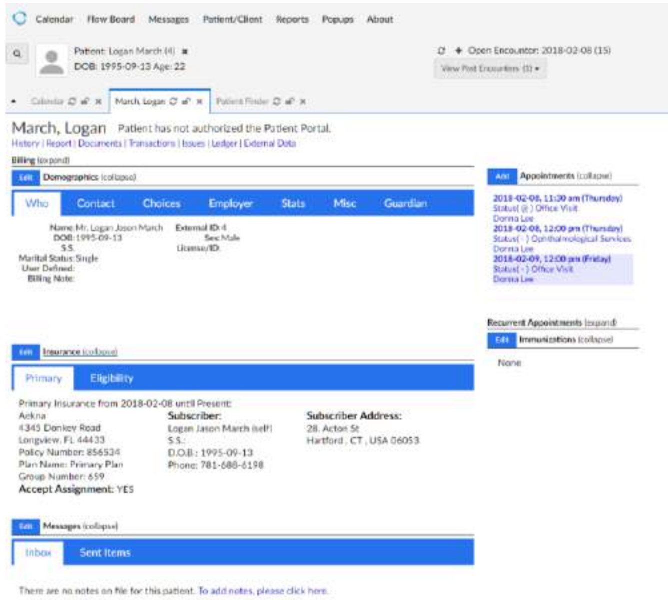

Figure 18: Demographics and insurance details of the patient

Uploading Patient Related Documents

You can upload files like Patient's ID, Insurance Card, Lab Reports etc. that has been scanned or saved by clicking on 'Documents' link available at the top of the Patient Summary screen. This shows a screen with the list of available document categories like: CCD, CCR, Lab Reports, Medical Report, Transaction, issues, Ledger etc.

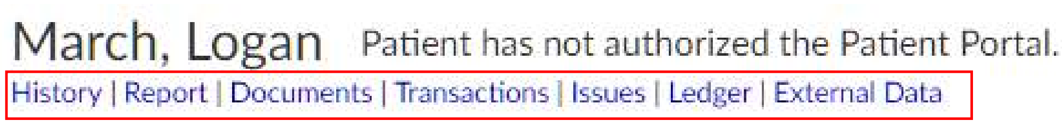

Figure 19: Categories of Medical data.

Click on the appropriate Document Category to upload the file. This will present a screen with a standard dialog for locating the file on your computer. Once the desired file has been selected, click 'Upload' to save the file in OpenEMR. Refer the screenshot below.

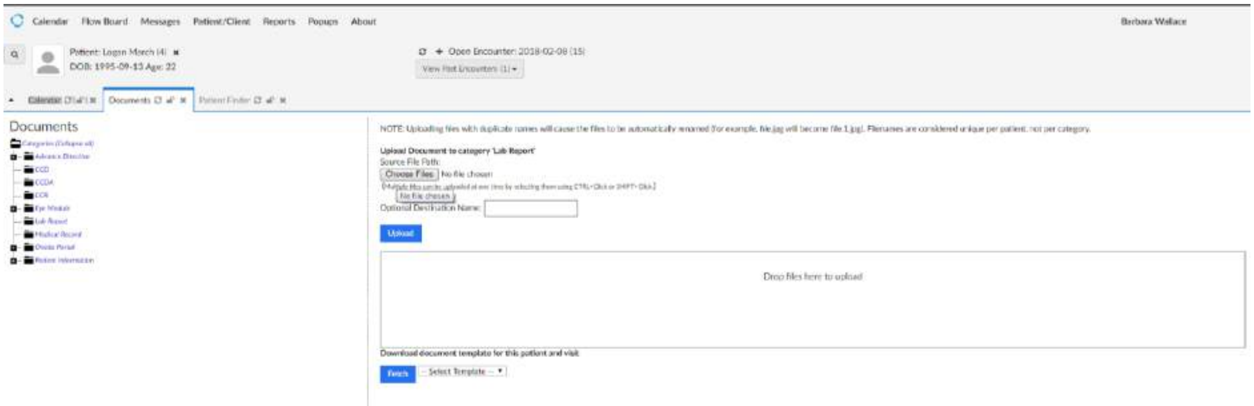

Figure 20: Uploading Documents

To see the file uploaded, 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 file to view it. Refer screenshot below. To add notes to the uploaded file, you can go the notes section in the screen below.

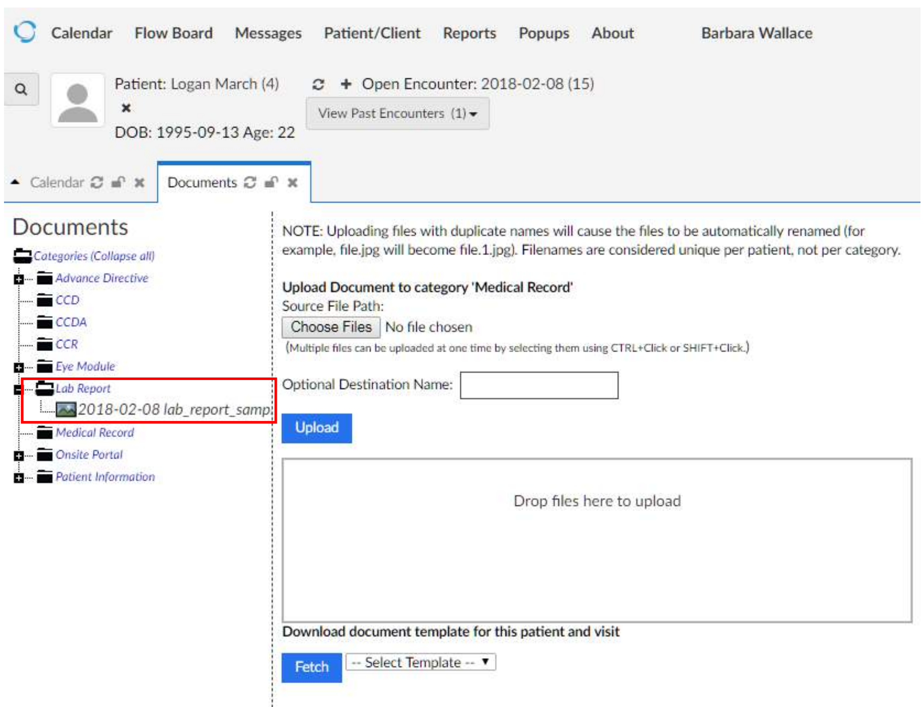

Figure 21: Viewing Uploaded Document.

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

Flow Board

Patient Flow Board allows you to see where patients are and how long they have been waiting. Patient Flow Board and Calendar work together and changes made in one program can be seen in the other.

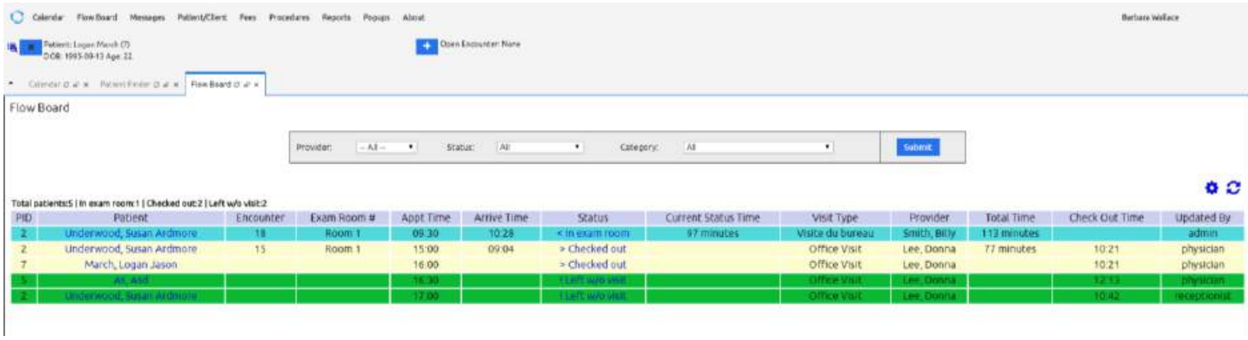

Figure 22: Patient Flow Board

Patient Flow Board shows the patient status with colors based on the appointment status code. The 'Current Status Time' is reset and restarted with each status change, but the total time keeps running.

(Timings are based upon arrival time not appointment time). These timings and status changes are stored so they can be retrieved on the Patient Flow Board report.

You can change the status of patient in the Patient Flow Board by just clicking on the ‘Status’ for a particular patient. A new window as shown in the screen below will be displayed.
Change the ‘Status Type’ for the patient and also enter the Room number (if required) and click on ‘Save’. The changes made will be updated.

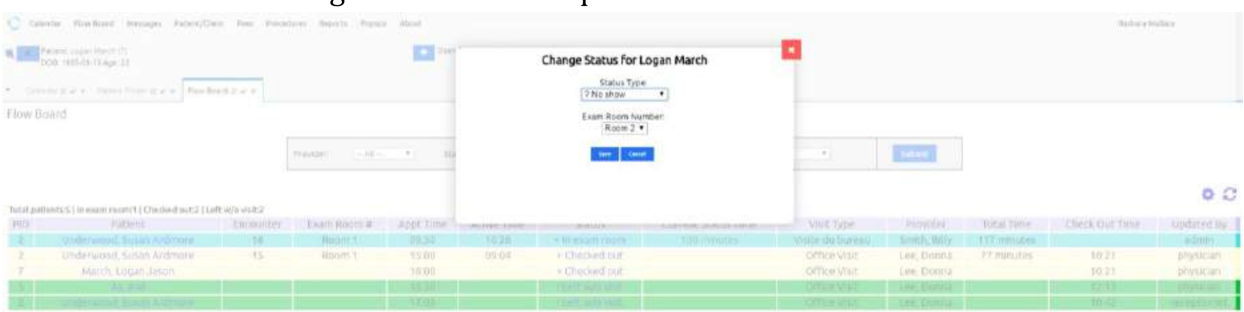

Figure 23: Patient Status Change.

Messages and Reminder

Message and reminder center allows to send message to the particular recipient or to the group of people. Reminders are used to set reminder for patients, providers on particular date.

Creating new Message

Click “Add new” in the message tab to send a new message. Add new message dialog box appears, in that select type, patient name, Status, Receiver names from list box and include the message, after including all the details, click “send message”. Type includes options such as Unassigned, Chart Note, Insurance, New Document, pharmacy, Prior Auth, Referral, Test

Scheduling, Bill/Collect, other, Lab Result, New Orders, Patient Reminder, Image Result. Status includes options such as New, Done, Forwarded, Read.

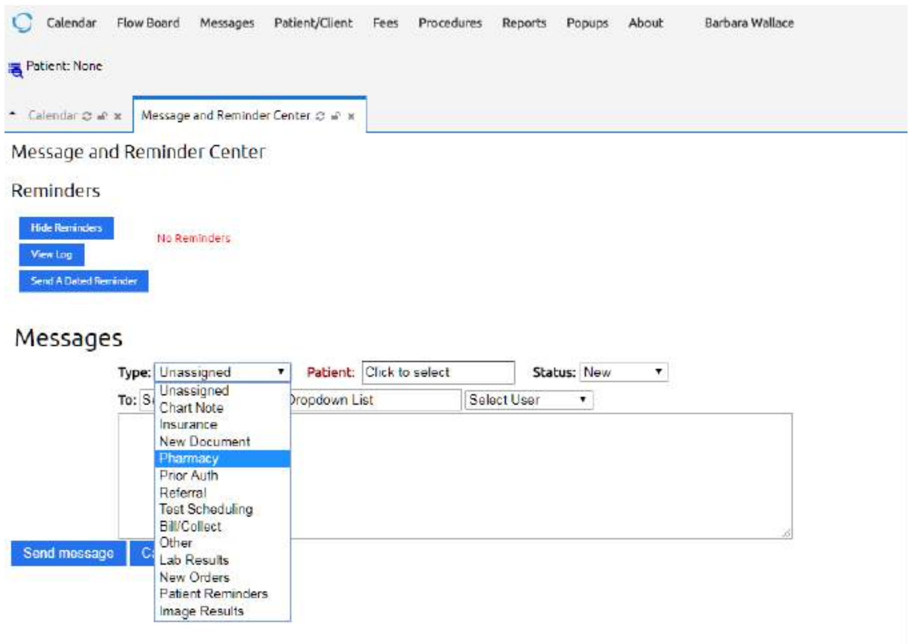

Figure 24: Setting New Message (Selecting Type)

Setting a Reminder

Reminder consist of View log and sent a Dated Reminder. While setting reminder, if it was to be set for patient, select patient name, recipient name (for Multiple recipient [ctrl]+ click to select multiple recipient, In order to send message to all, click sent to all),Due Date, Priority and Message. All the messages sent today will be displayed below.

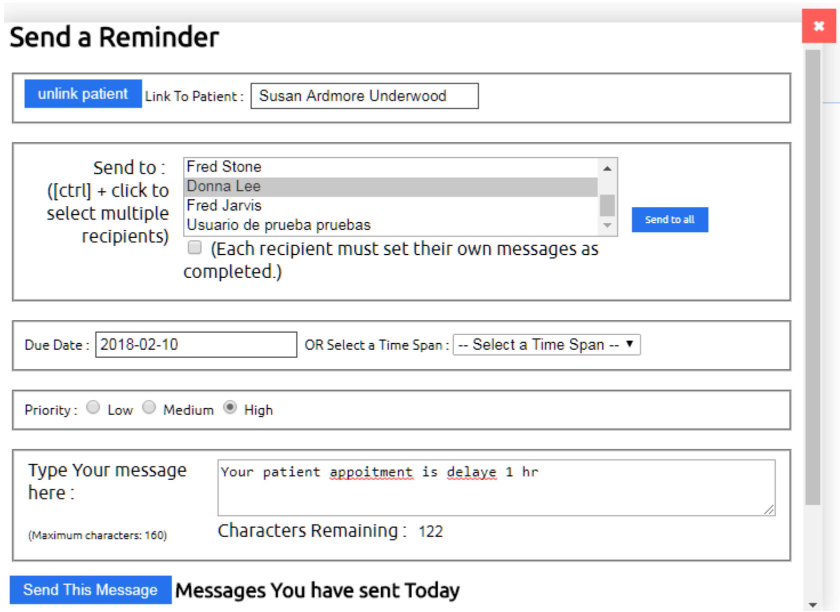

Figure 25: Creating new Reminder

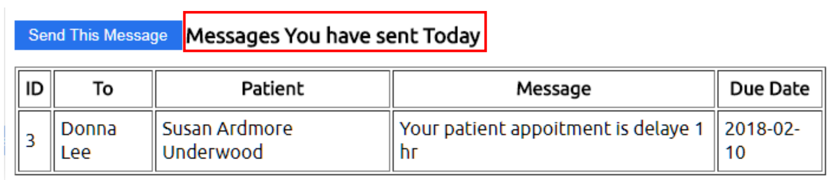

Figure 26: Message sent today.

To view all the reminders between two dates, select View Log, and enter the two dates such as start date and end date.

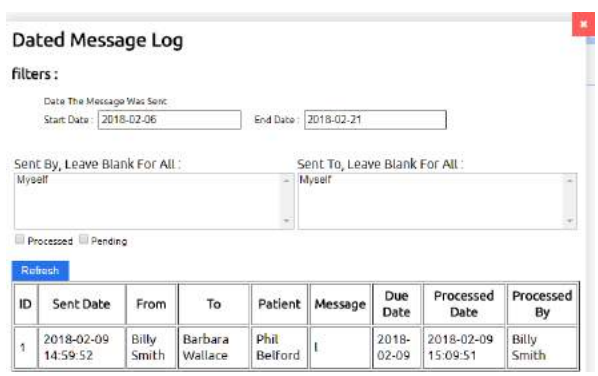

Figure 27: Message log

To view all the message, **show all** under message in main window.

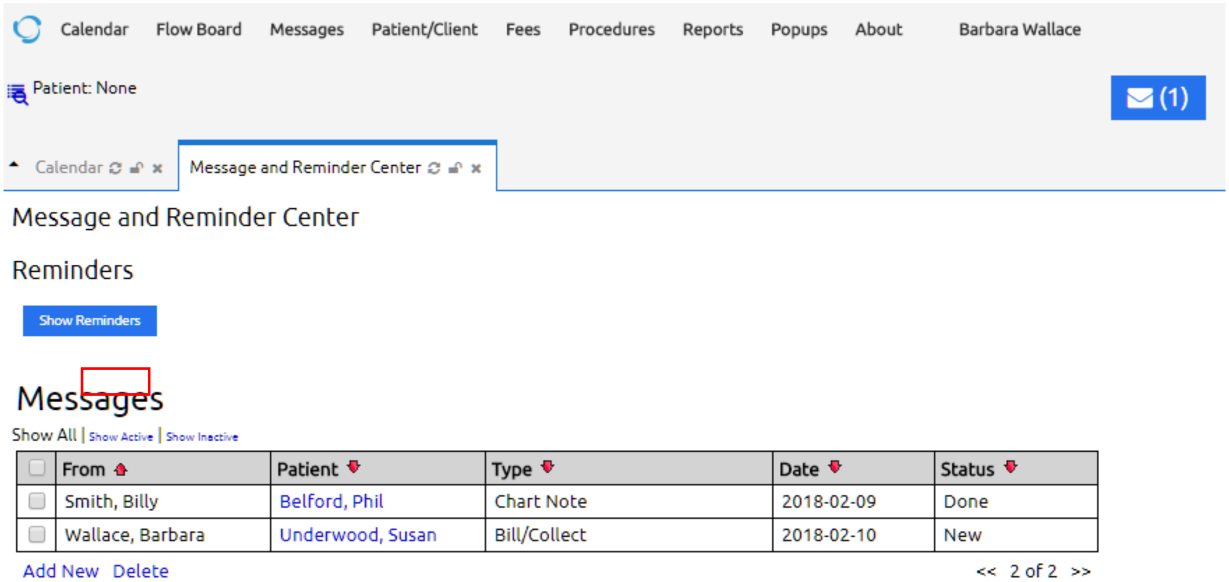

Figure 28: Show all Message View

In order to delete check the message and click Delete button.

Patient/Client

Patient

Click patient from Patient/Client to view the list of patients in the EMR. The records are search by using Full Name, Home Phone, SSN, Date of Birth or External ID.

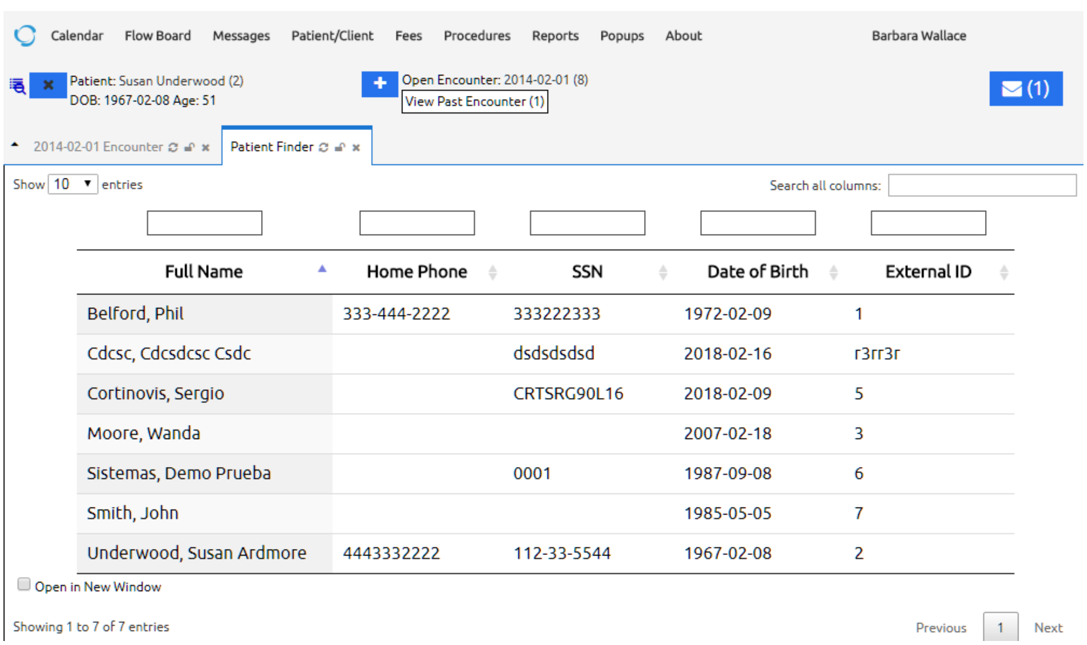

Figure 29: Patient List

New/Search

New/Search was used to add new patient to the healthcare. Patient Name, Date of Birth and Sex are mandatory fields to create a new patient. If you have an existing chart for this patient, you may enter the chart number under 'External ID', If not the system will take care of this. Enter all the required information and click on ‘Create New Patient’. This will display a pop up box that shows if there is an existing patient or not after you create a new patient. Clicking on ‘Confirm Create New Patient’ will takes you to the Patient Summary page. Refer *Figure 8*.

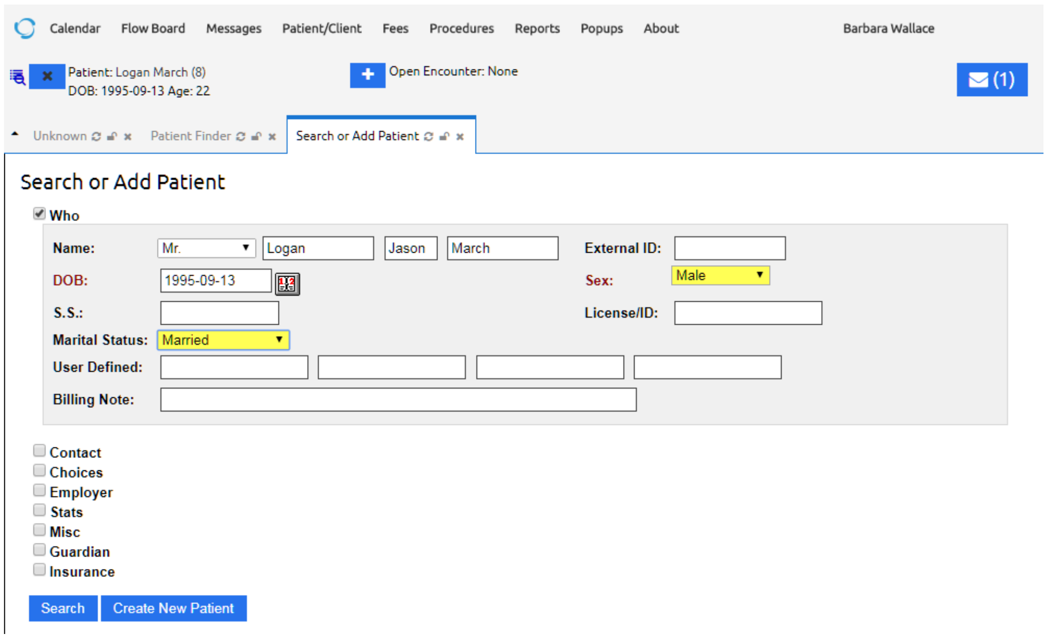

Figure 30: Add new Patient

Summary

Patient summary is used to view summary of the patient which includes Demographics, Notes, Disclosure, Amendments, and Labs.

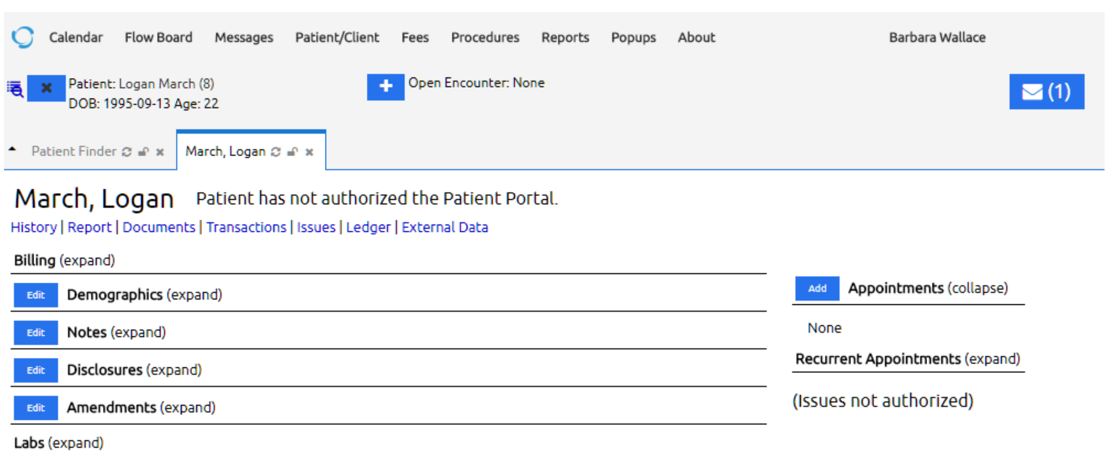

Figure 31: Patient Summary.

Record

Patient Record Request

The request can be submitted from the Patient/Client->Records->Patient Record Request page. It is used to record the electronic medical records of the patient.

Import

Upload

To Upload CCR XML

1. To upload CCR document of already existing patient use Patient Summary Screen -> Documents. For CCR document of a new patient use Miscellaneous->New Documents screen.
2. Upload the xml file under the category CCR
3. After Uploading click the button `Import`.
4. Approve the patient from Patient/Client->Import->Pending Approval.

Pending Approval
To view the pending approval, go to Patient/Client -> Import -> Pending Approval.

Fees

Fee Sheet

Once the patient has arrived and encounter summary has made, click on Fees -> Fee Sheet in top navigation or by clicking Patient name in calendar, then select Administrative -> Fee Sheet and enter the details there.

Note: Either Use ICD 10 Diagnosis or CPT4 Procedure/Service and enter the details and Click Save.

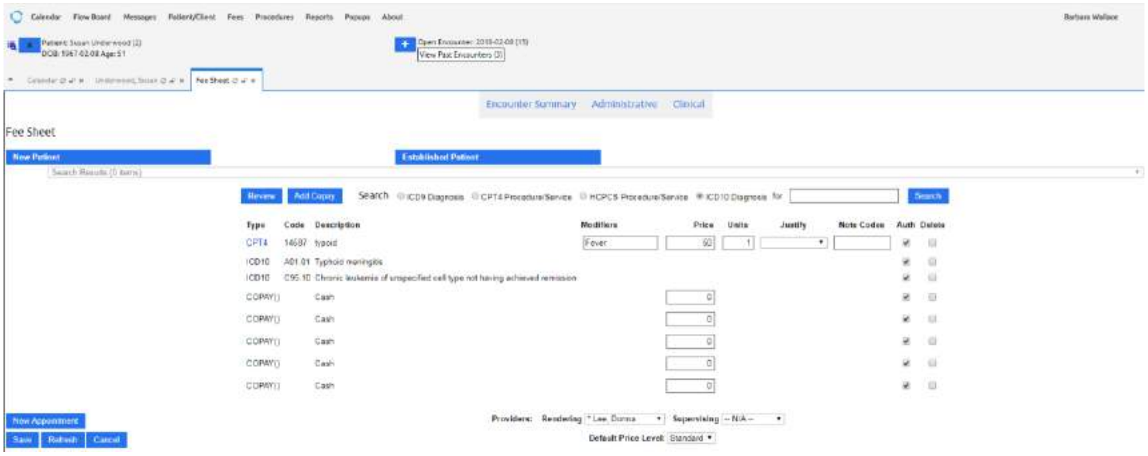

Figure 32: Fee Sheet

Payment

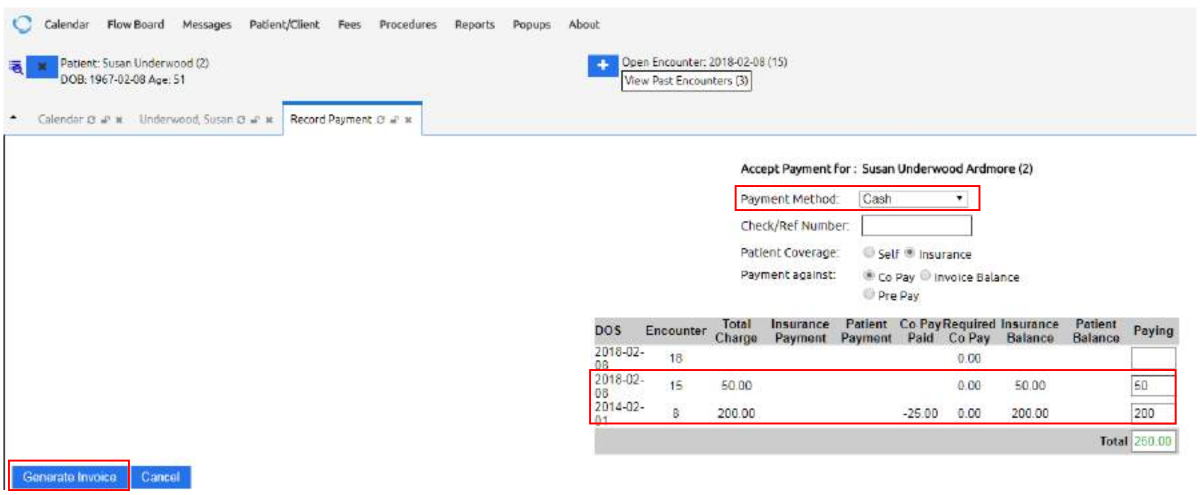

Figure 33: Patient Payment

In this payment screen enter the following details:

1. Payment Method – Select 'Cash' from the dropdown
2. Payment Against – Select the 'Co Pay' radio button
3. Select the encounter for the patient for whom Co Pay has to be done and enter the Co Pay amount
4. Once the required information has been entered, click on 'Generate Invoice'
5. Payment receipt will be generated which can also be printed

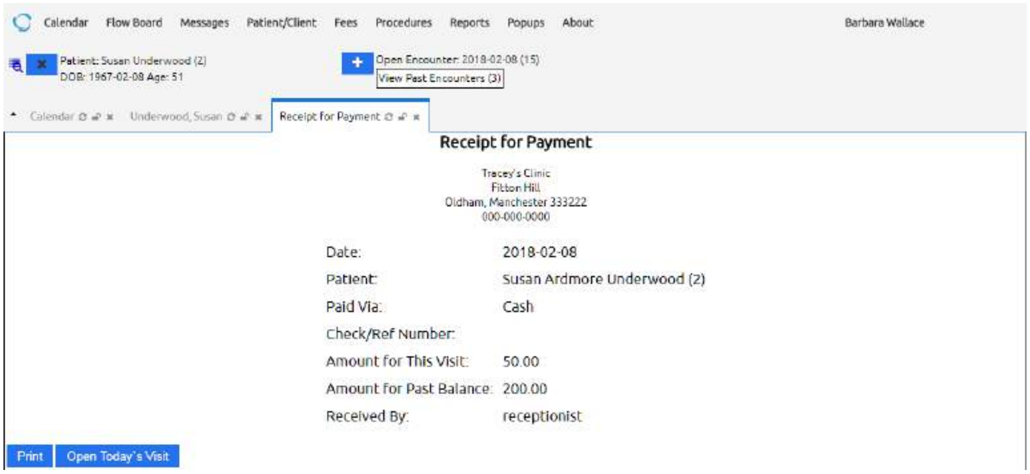

Figure 34: Receipt for Payment.

Select Print to print the receipt.

Batch Payment

Payment can also be done by Selecting Payment-> batch payment. Batch payment is used bundle multiple bills into one payment transaction. You can then export the file and upload it into your online banking or other payment service. Your bank processes the file and pays the bills in the batch.

New Payment

To make a new payment, Select **new payment** tab under batch payment.

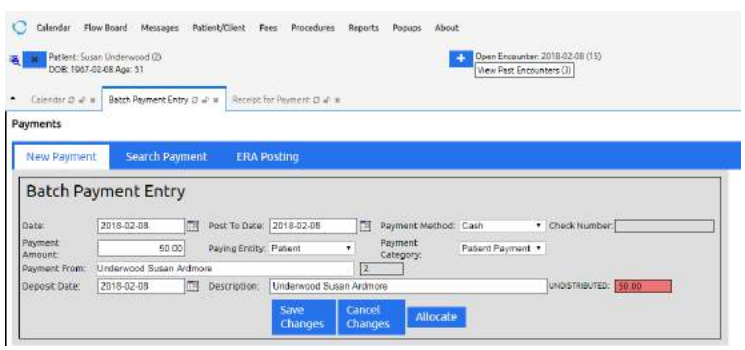

Figure 35: Batch Payment Entry

Search Payment

It is used to search payment details by using either of the following such as deposit Date, payment amount, payment type, date, payment category etc.

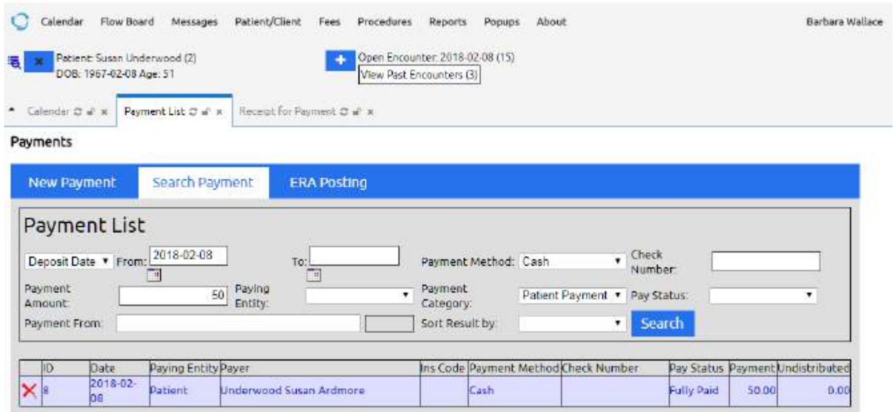

Figure 36: Search payment

ERA posting

An electronic remittance advice (**ERA**) is an electronic data interchange (EDI) version of a medical insurance **payment** explanation. It provides details about providers' claims **payment**, and if the claims are denied, it would then contain the required explanations.

It include Details such as Date, Post to date, Deposit Date, insurance etc.

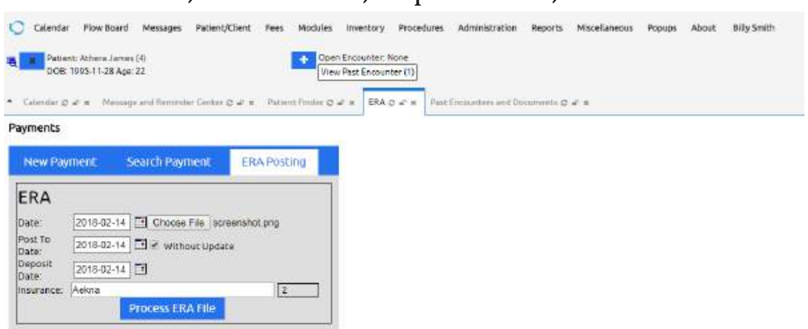

Figure 37: ERA posting

Procedure

Provider

OpenEMR can work with collections of diagnostic tests using a functionality called "Procedures". Procedures are not just for ordering lab tests and recording their results; they apply to any procedure that performs some act and records results for that act. OpenEMR's procedure orders meet the Meaningful Use requirement to store test results in the EMR as structured data.

In order to create procedures,

1. Select **Procedures-> Providers**
2. Click **Add New** button

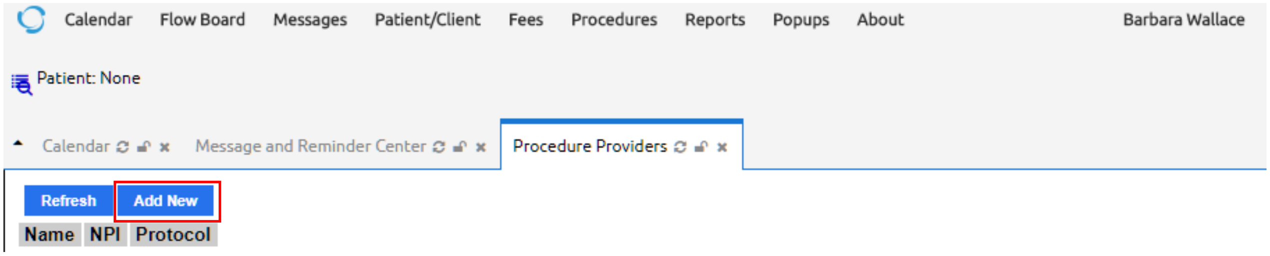

Figure 38: Adding new Procedure.

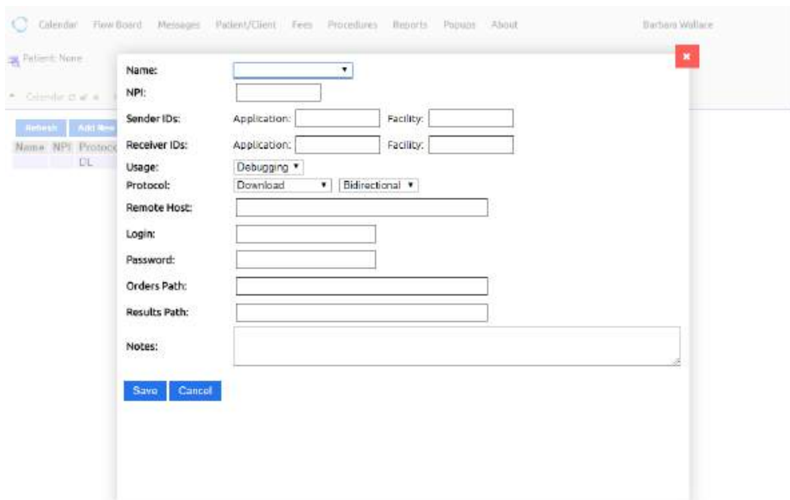

Figure 39: New Procedure Dialog Box

After entering the details, click save to add a new procedure.

Configuration

In order to configure the procedures, select **Procedure -> Configuration**. Orders and Result type Tab gets opened.

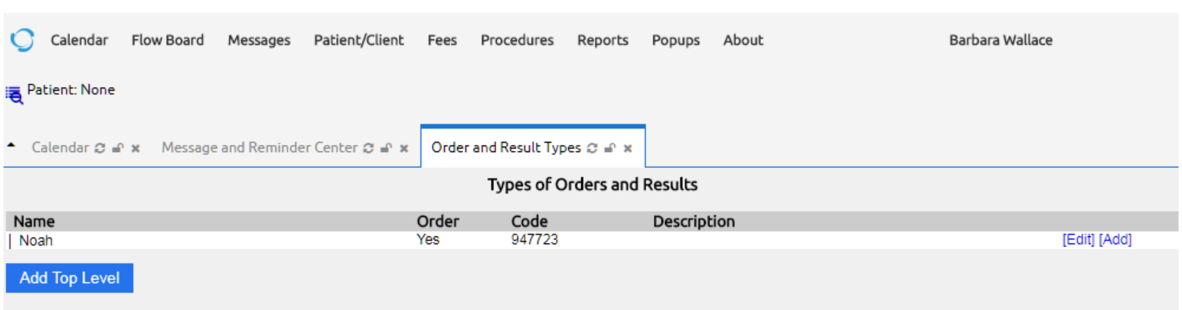

Figure 40: Configuration Tab

Click "Add Top Level" and select procedure type, enter name, Description, sequence and click Ok.

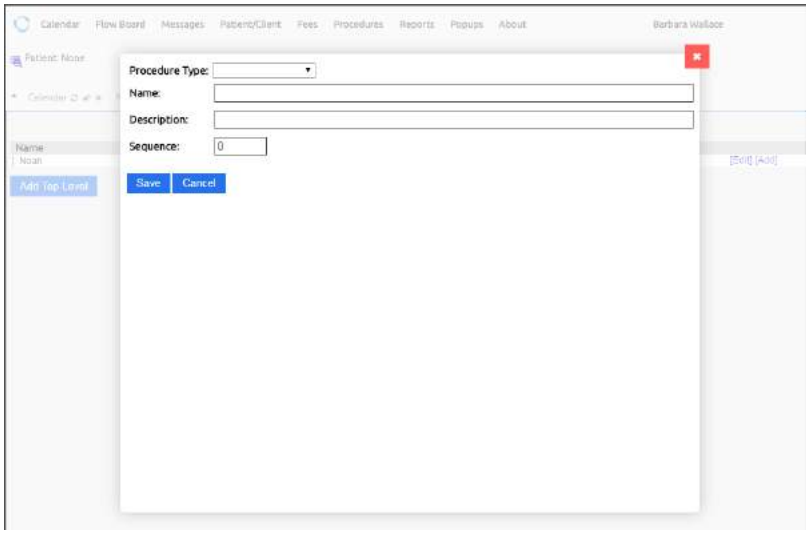

Figure 41: Adding new Top Level.

To add a next Level inside top level select Add link in right corner and enter details of next level and click ok.

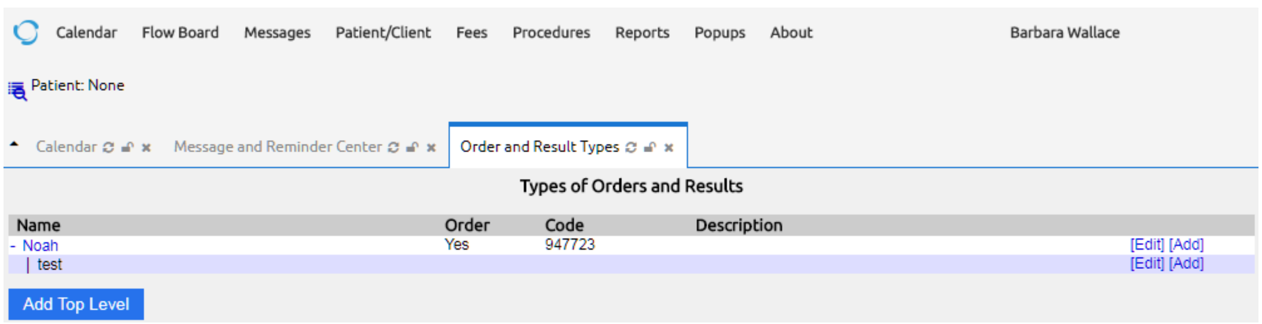

Figure 42: Types of Orders and Results

Lab Documents

To generate list of lab documents, go to Procedure -> Lab Documents.Selct from Date and To date to generate the lab documents between those dates.

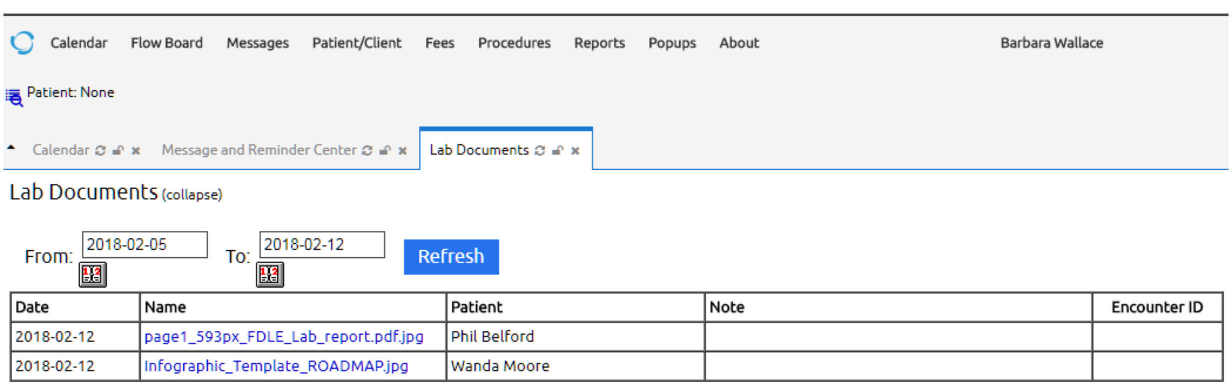

Figure 43: Lab Documents.

Reports

Clients

List

To generate the client list report click Reports-> Client-> List. The reports can be generated based on providers and can also be created between two dates.

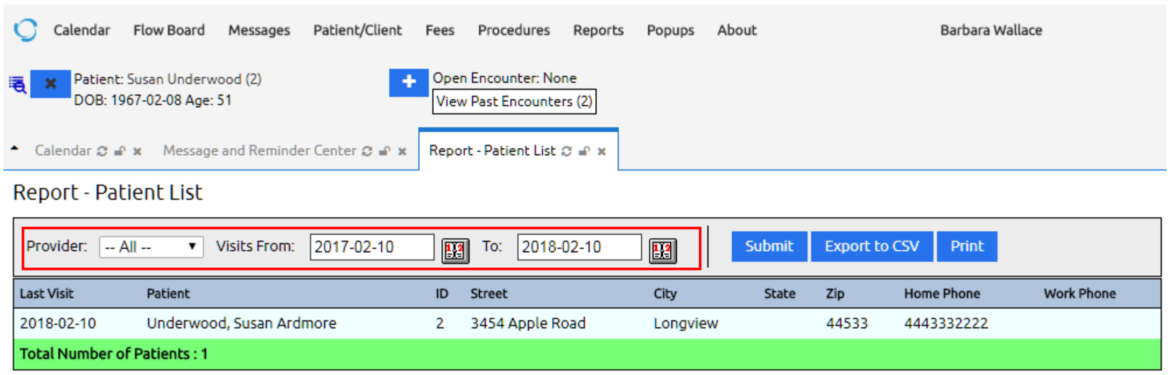

Figure 44: Patient List

Referrals

It is the report which consist of ReferTo, Referdate, ReplyDate, patient, ID, Reason for the patient consulting provider.

Immunization Registry

To open Immunization tab, click edit near immunization option in patient profile page,refer figure20.Enter Immunization (CVX) code, Amount, Completion status, Administration site andother details, then Cick save.

Note: To generate immunization registry report, select Report-> Client->Immunization Registry.

Clinic

Report Results

To keep track of all the reports generated, go to **Reports-> Clinic->Report Results**. Enter Begin Date ad End date for generating report.

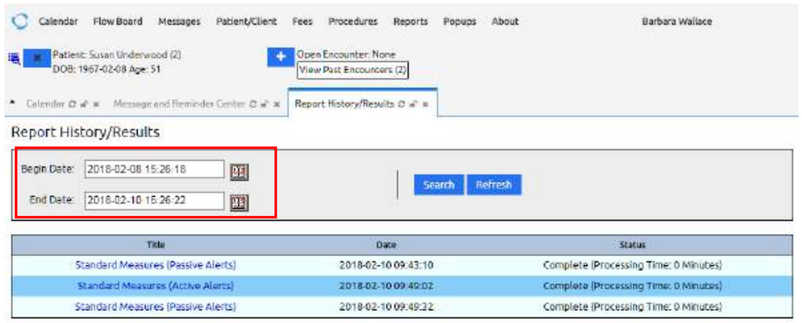

Figure 45: Report Results

Standard Measures

Standard measures Report was generated which include, Target Date, Rule set, Plan set, Provider, provider relationship by selecting Reports->Clinic-> Standard Measures. Rule set includes active alert rules, passive alert rules and patient reminder rules. Plan set includes ignore or Active plans. All the provider names are included in provider combo box, provider relationship will defined as primary or encounter.

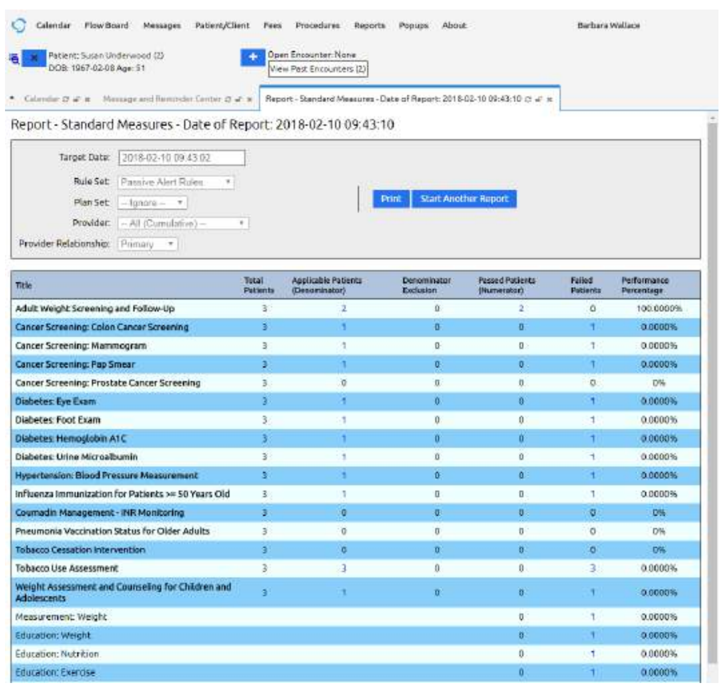

Figure 46: Standard Measures

Clinical Quality Measures

To generate clinical quality measures, fill all the details including Target Date, Rule set, Plan Set, Provider, and Provider Relationship.

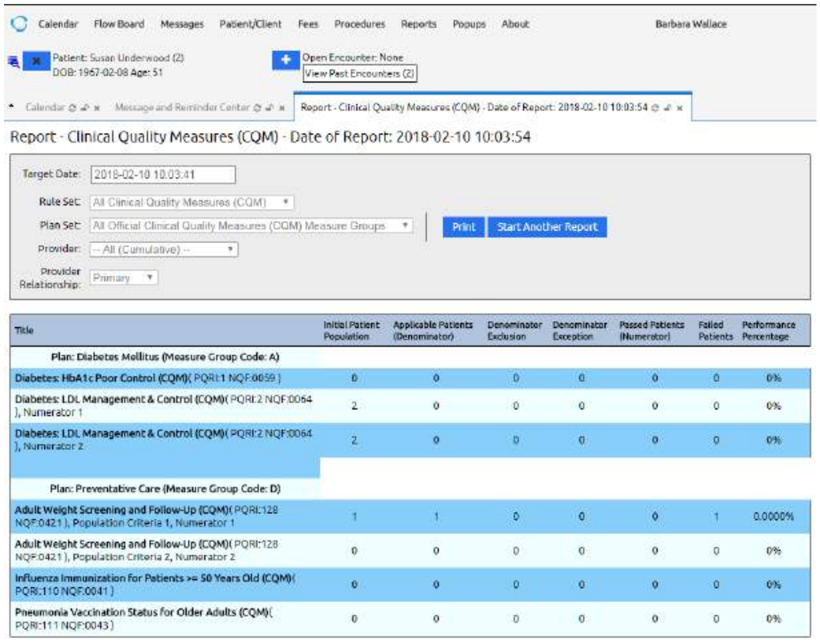

Figure 47: Clinical Quality Measures.

Automated Measure Calculation

To generate Automated Measure Calculation, click **Reports-> Clinical-> Automated Measures.** Enter Begin date, end date, Rule set, Provider, and Provider Relationship.

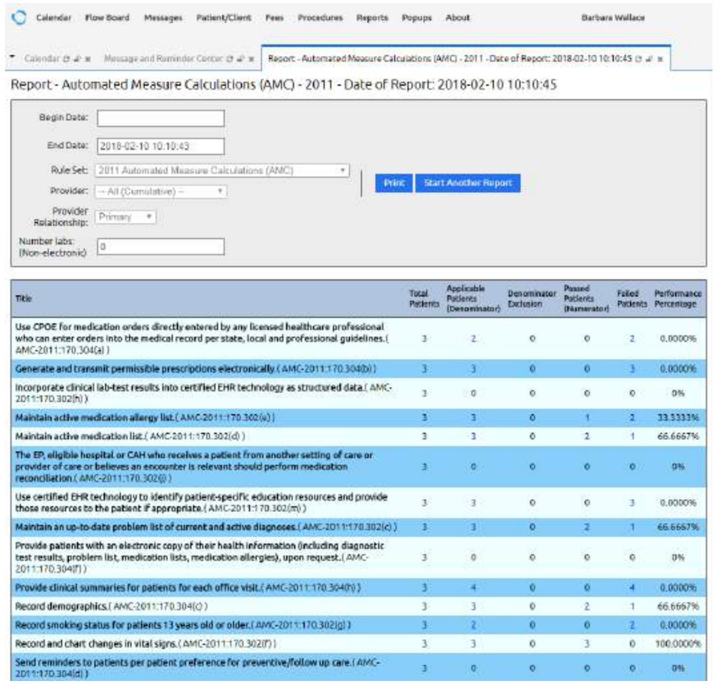

Figure 48: Automated Measures Calculation

AMC Tracking

AMC Tracking is used to provide patients with an electronic copy of their health information (including diagnostic test results, problem list, medication lists, and medication allergies). To generate AMC tracking Select Report->Clinic->AMC Tracking.

Note: Before generating AMC Tracking, Select the patient and go to Patient/client->Record -> Patient Record request.

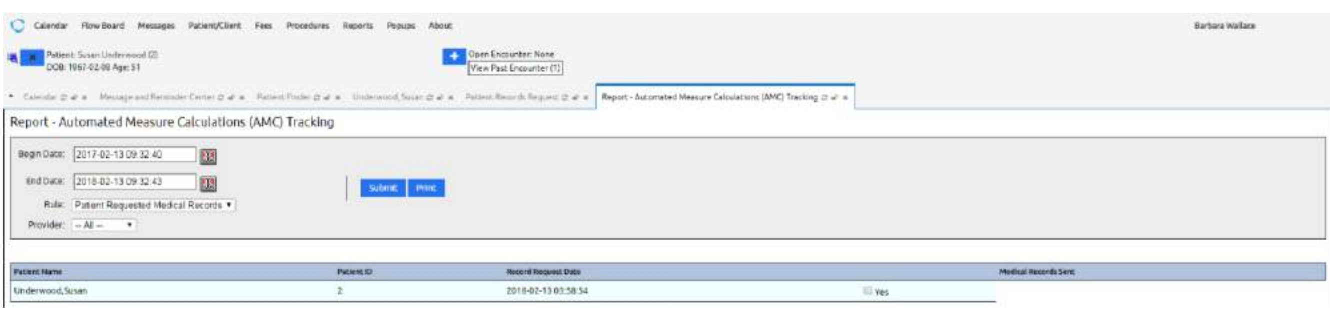

Figure 49: AMC Tracking

Alerts Log

In order to generate Alert Logs, select **Reports ->Clinic-> Aler Logs**. Enter Begin Date and End Date and Click Search.

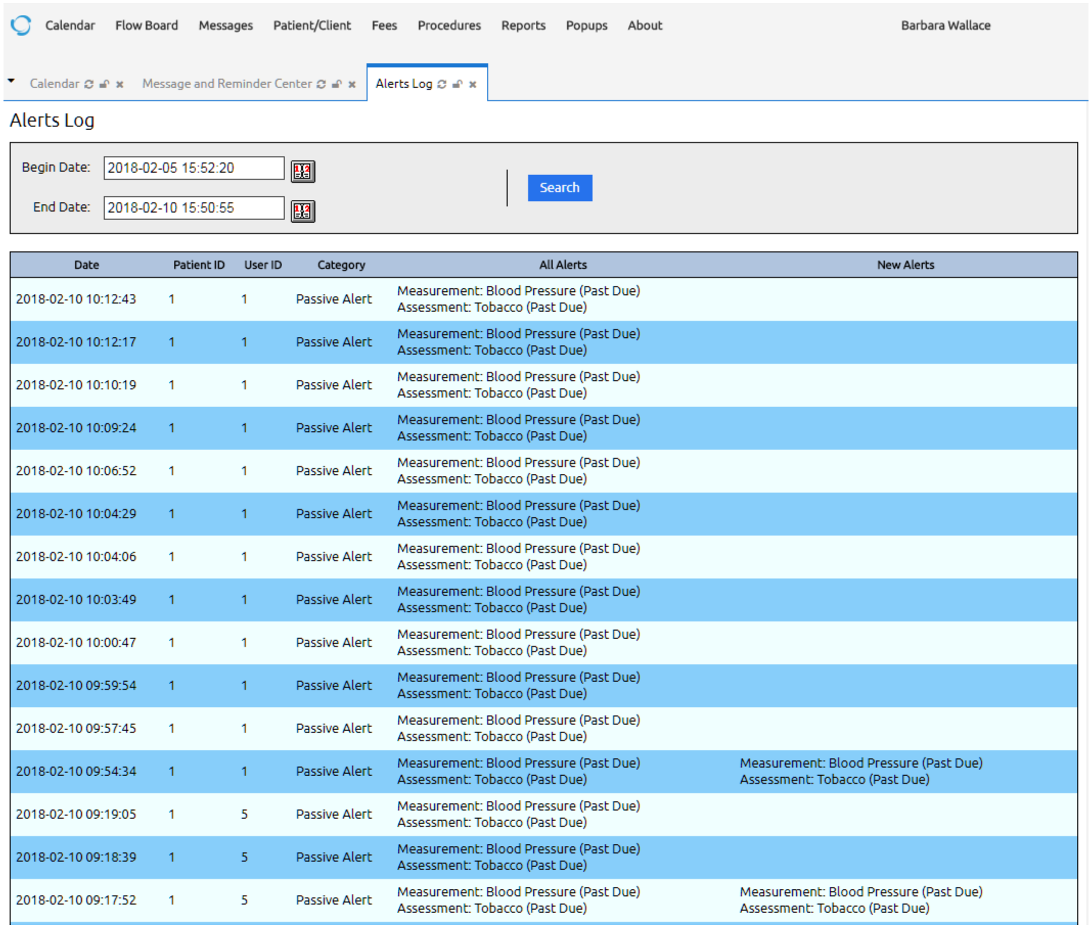

Figure 50: Alert Logs.

Visits

Daily Reports

To generate Daily Reports, Click ***Reports-> Visits -> Daily Reports***. Select Facility, Provider, From and To date to generate data.

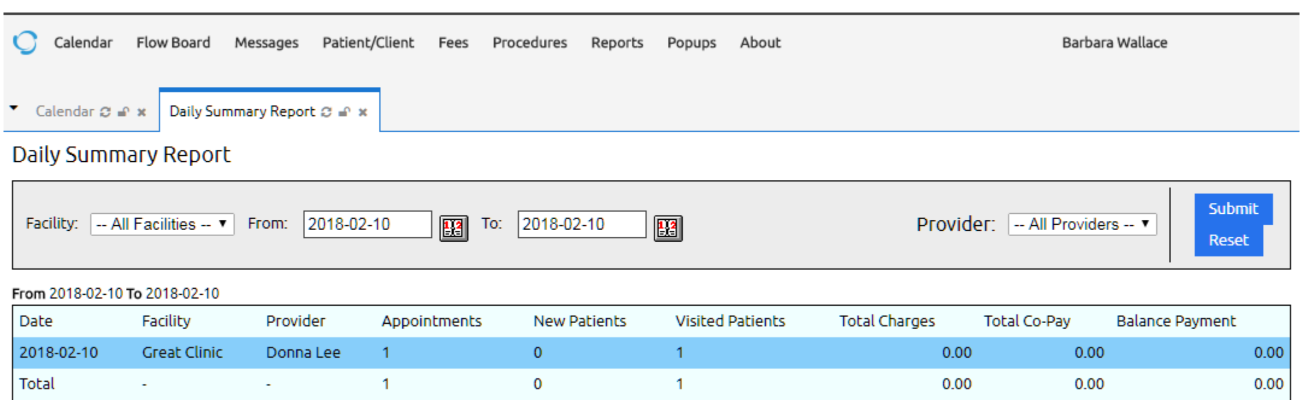

Figure 51: Daily Summary Reports

Appointments

To view Appointment details, Goto ***Reports->Visits->Appointments.***

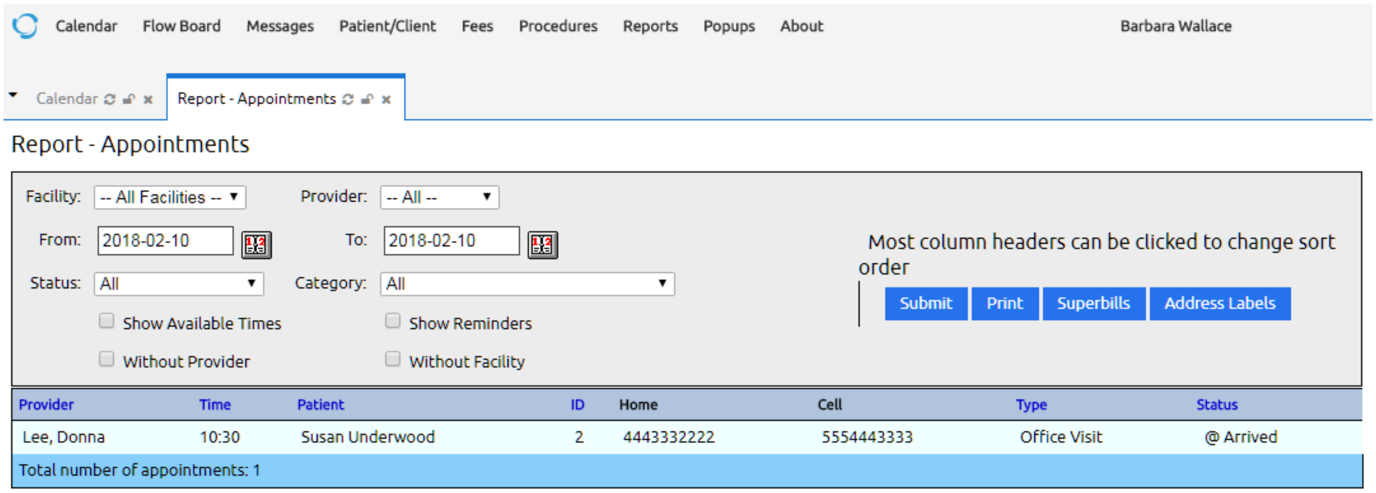

Figure 52: Appointment Reports

Patient Flow Board

Flow Boards are used to get report between two dates which reveals Provider name, Date, Time, Patientname, ID, Type, Final Status, Arrival time, Discharge time etc. To generate Patient Flow Board, select ***Reports->Visits->Patient Flow Board***

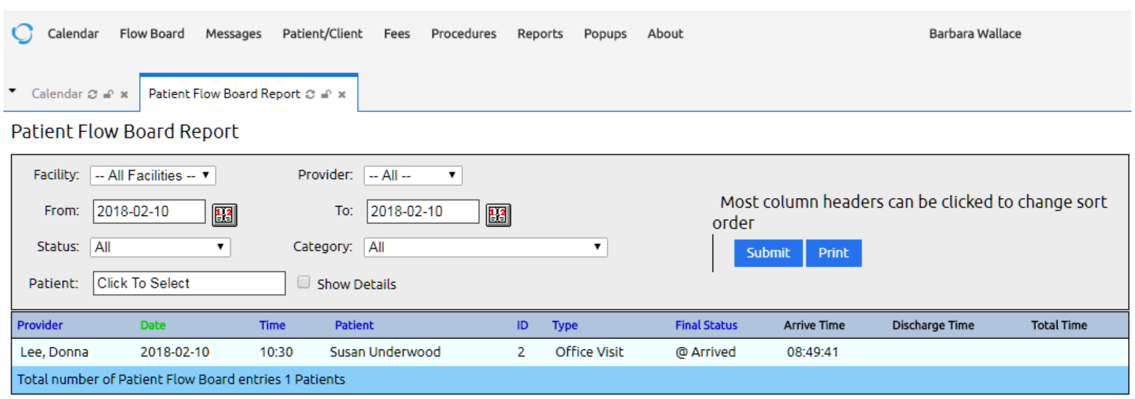

Figure 53: Patient Flow Board

Eligibility

To generate eligibility report, click ***Reports -> Visits-> Eligibility***. It will generate report with details such as Facility name, Insurance Company, Policy name, DOB, Gender, SSN.

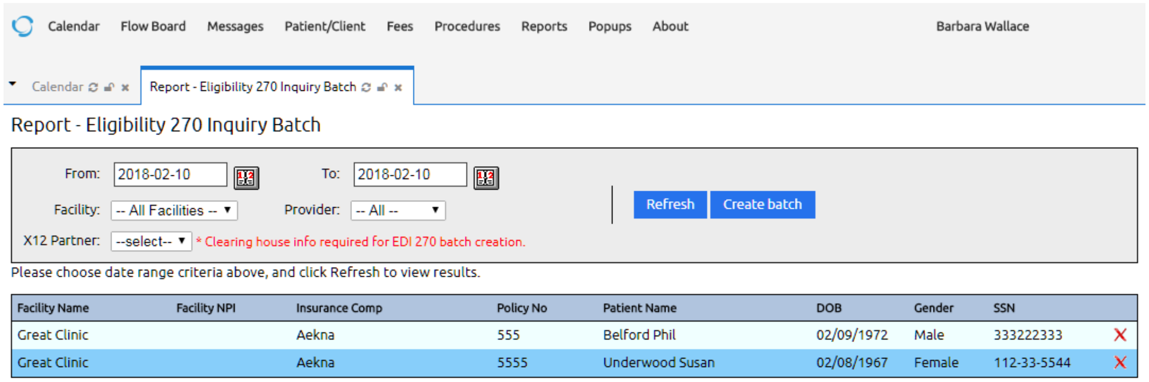

Figure 54: Eligibility Reports

Syndromic Surveillance

It is a **surveillance** using health-related data that precede diagnosis and signal a sufficient probability of a case or an outbreak to warrant further public health response.

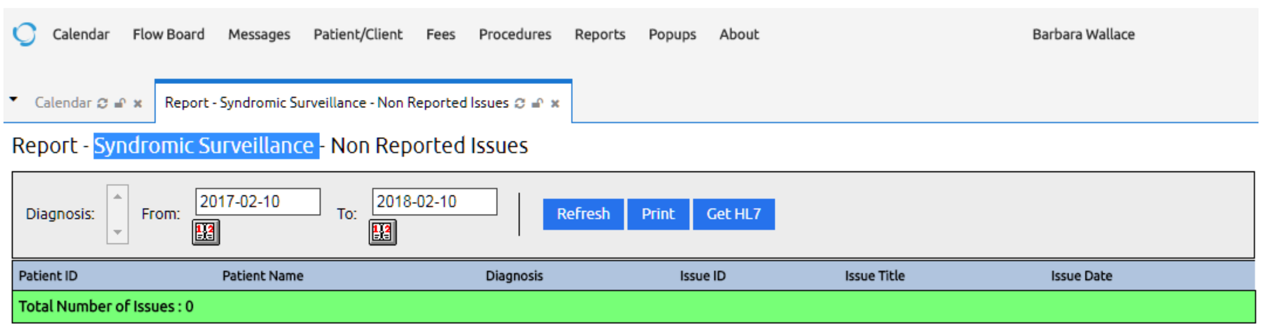

Figure 55: Syndromic Surveillance Report

Insurance

Distribution

To generate Patient Insurance Distribution report, go to Report-> Insurance->Distribution.

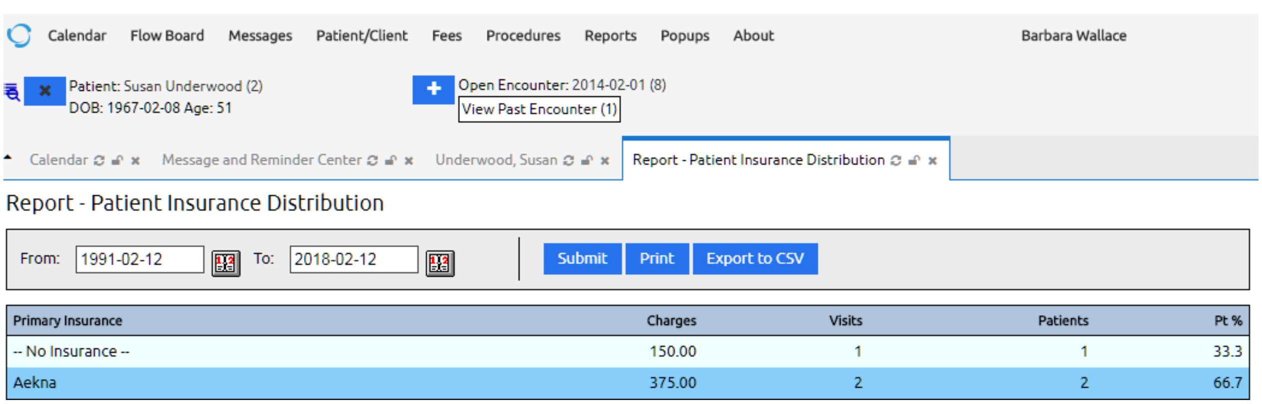

Figure 56: patient Insurance Distribution

Indigent

To generate Indigent patient report, go to Report -> Insurance -> Indigent

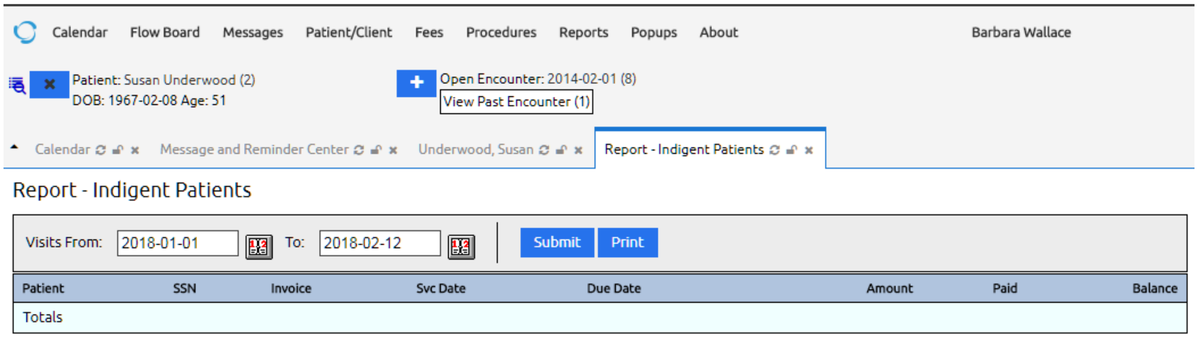

Figure 57: patient Indigent Report

Blank Form

Demographics

It is used to generate a blank Demographics Form for printout. To generate blank Demographics Form, Goto Report-> Blank Forms -> Demographics.

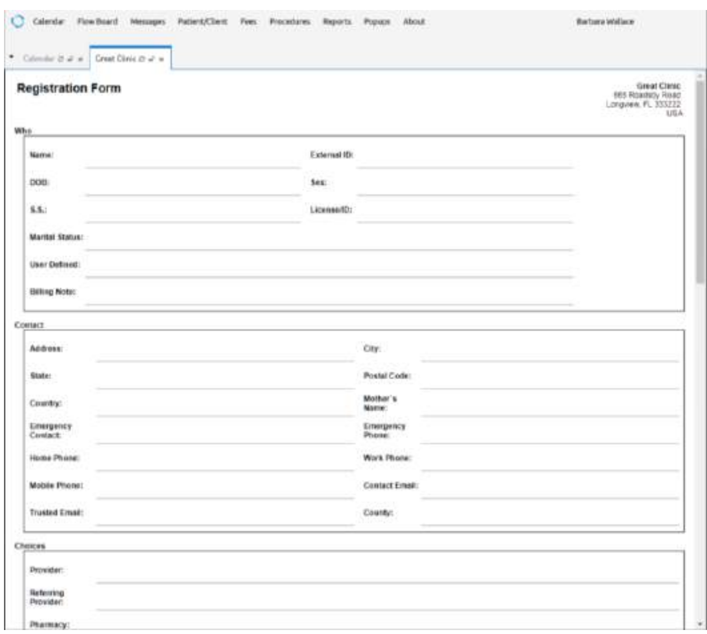

Figure 58: Demographics Report

Super Bill/Fee Sheet

Fee Sheet was generated by selecting Reports -> Blank Forms -> Super Bill / Fee Sheet.

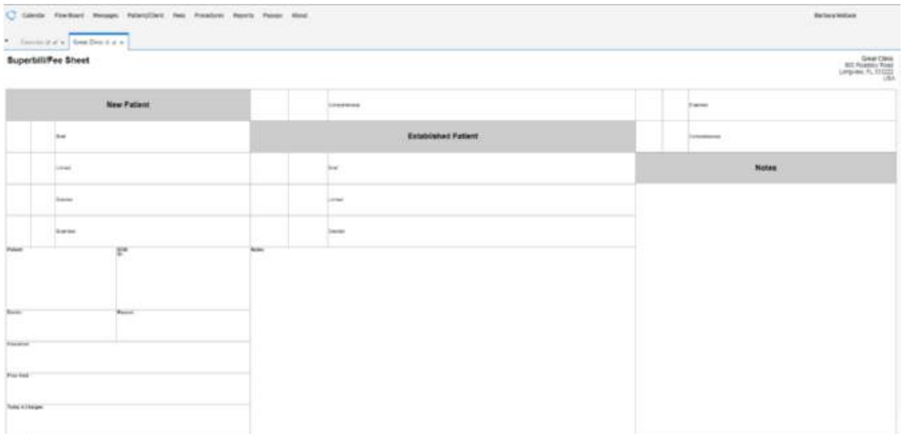

Figure 59: Fee Sheet

Referrals

To generate Referrals form goto Reports ->Blank forms ->Referrals. The Hard copy of Referrals are taken by justing print option.

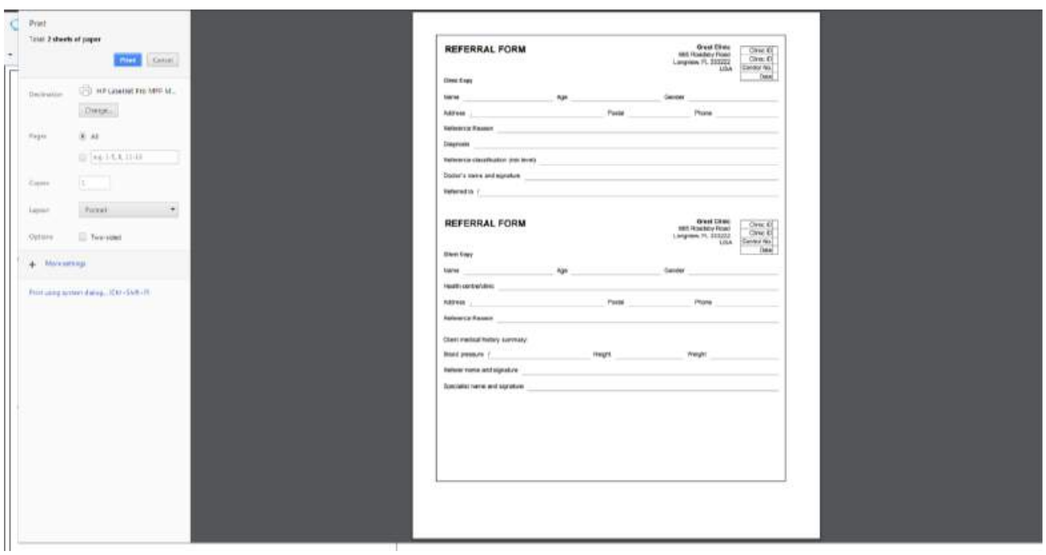

Figure 60: Referrals

Popups

Appts

It is used to prepare report on Appointments which includes Facility name,Provider,From Date,To Date, Satus and Category.It also incude other choices such as show Available time, Show Reminders, Without Provider, Without Facity.

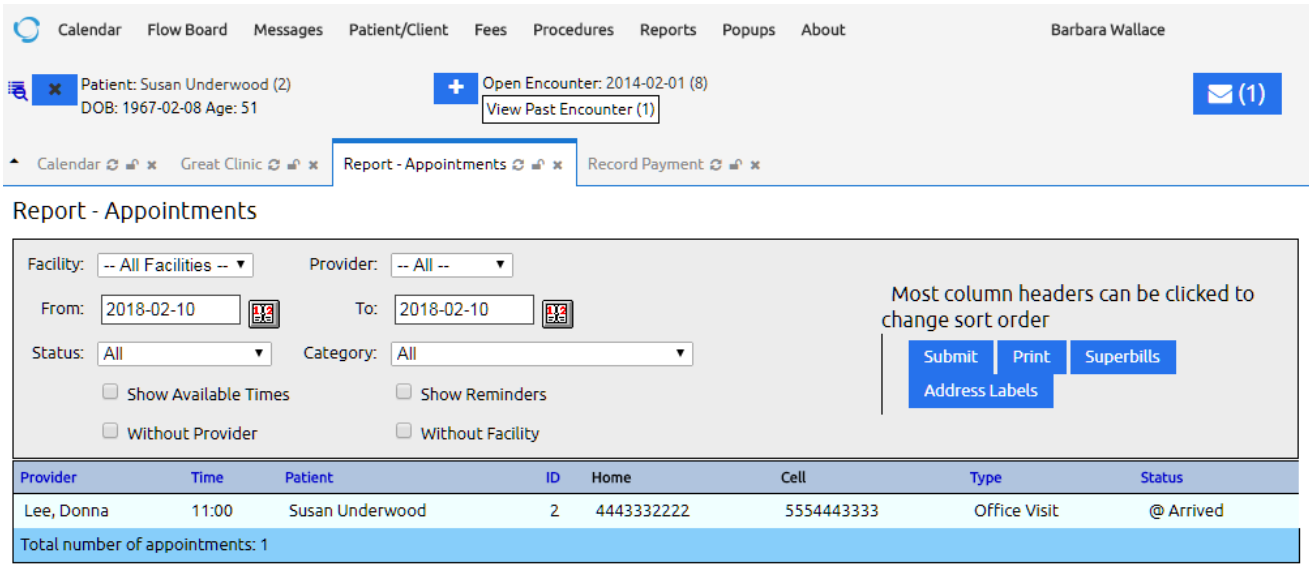

Figure 61: Appointments

Super Bill/Fee sheet

To create a blank fee sheet, go to **Popups-> Super Bill.**

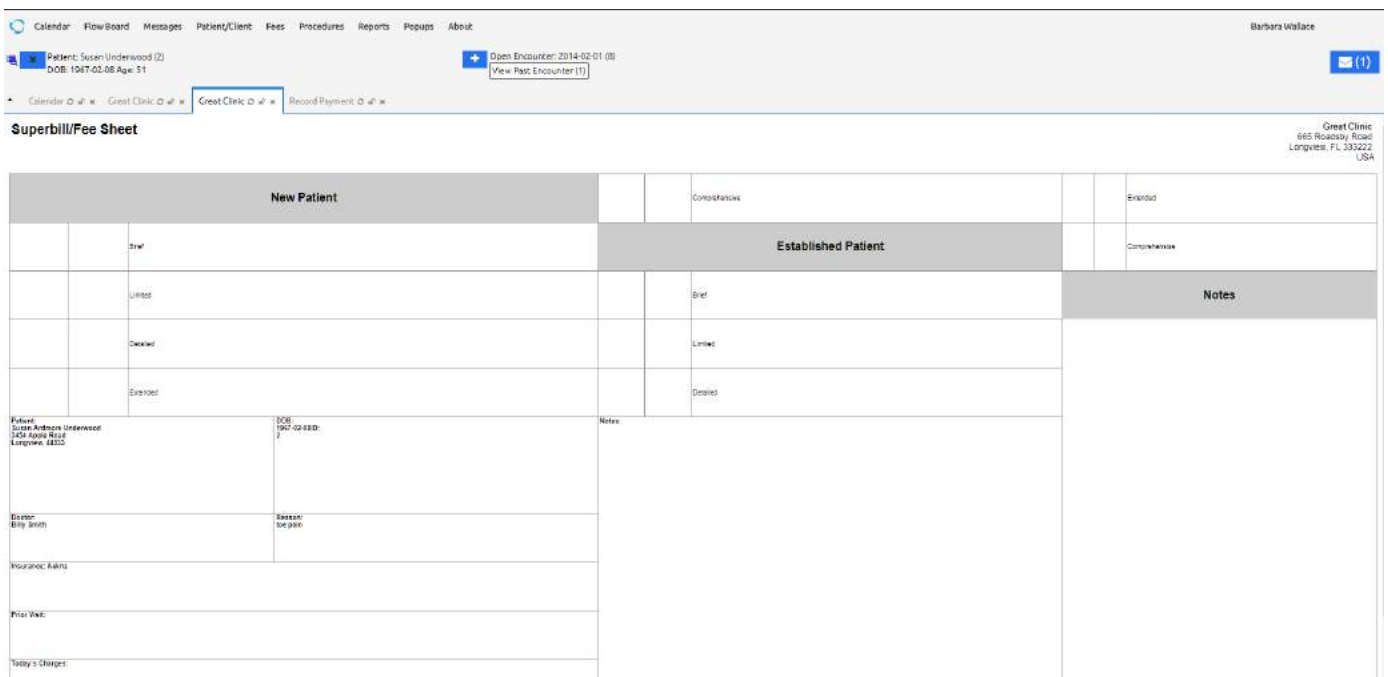

Figure 62: Super Bill / Fee Sheet

Payment

It provide payment service for user, which includes payment method, Check/ref Number, Payment Coverage, Payment Against. Payment Coverage has options such as Self or insurance whereas Payment against has options such as Copay, Invoice Balance, Pre pay. Refer *figure 33*

Letter

To generate a letter, include fields such as From, Date, Specialty, Template, To, Print Format.

To generate Letter, select popups->Letter.

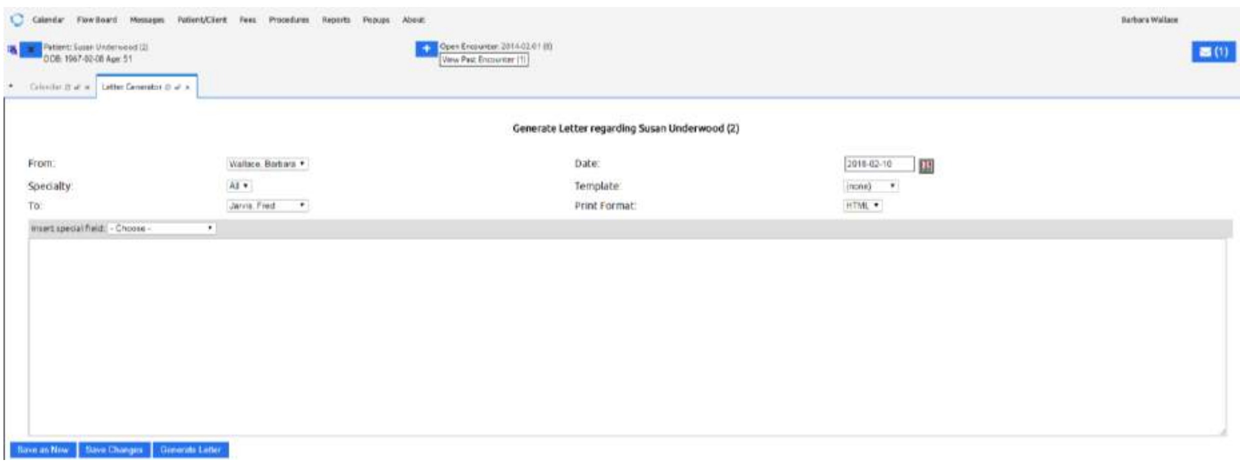

Figure 63: Letter

Chart Label

Chart label is used to generate name labels for patient charts. To generate Chart Label, select Popups->Chart Label.

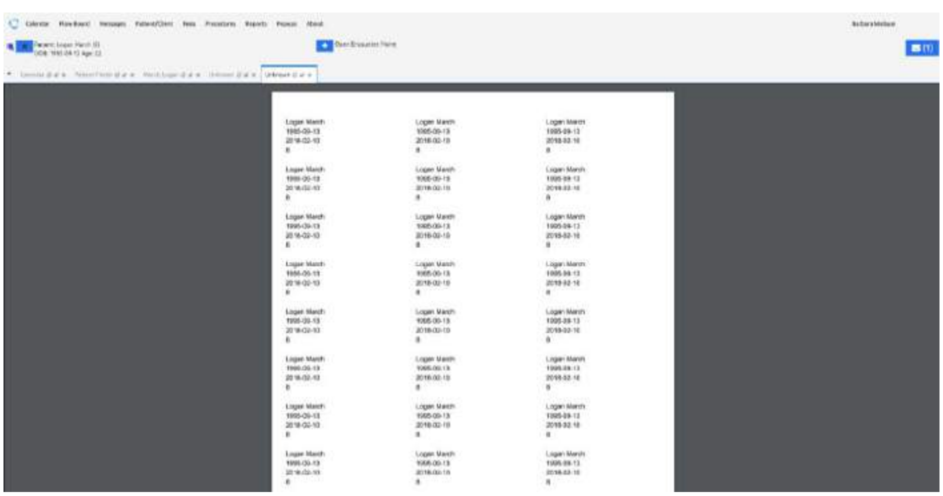

Figure 64: Chart Label

Barcode Label

It is used to generate barcode for the patient details. To generate Barcode Label, go to Popup -> Barcode Label.

Note: To generate Barcode or Chart or Address Label, Select the patient first.

Figure 65: Barcode Label

Address Label

To generate Address Label, select Popups->Address Label.

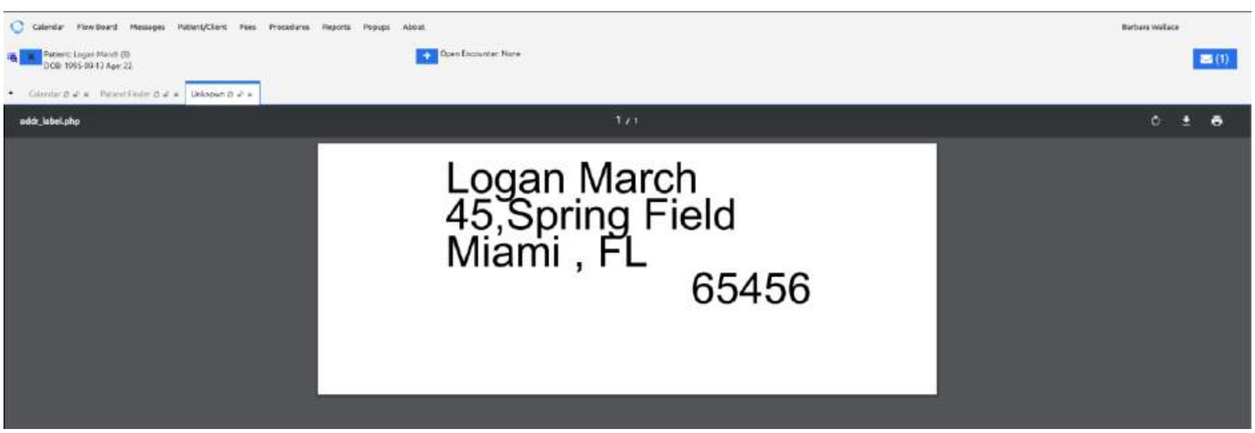

Figure 66: Address Label

OpenEMR an Easy to Use Guide for Front office Receptionist.
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