

OpenEMR Users Guide

Based on Version 4.0

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Getting Started

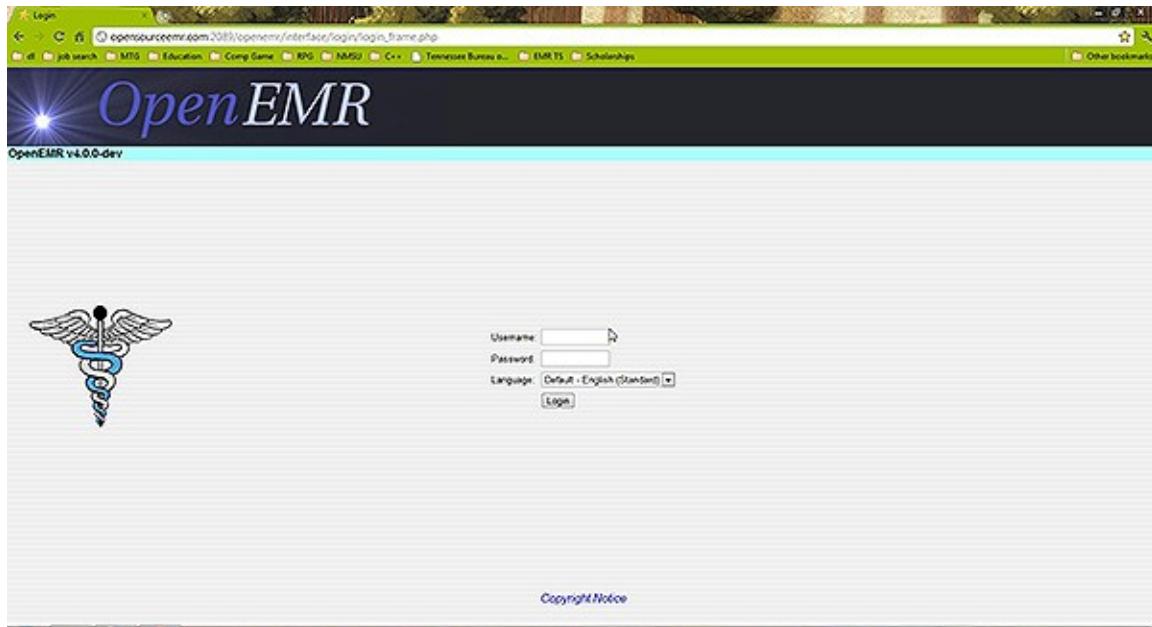
Getting to the Login Page

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://www.oemr.org/demo/openemr/>

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



Logging In

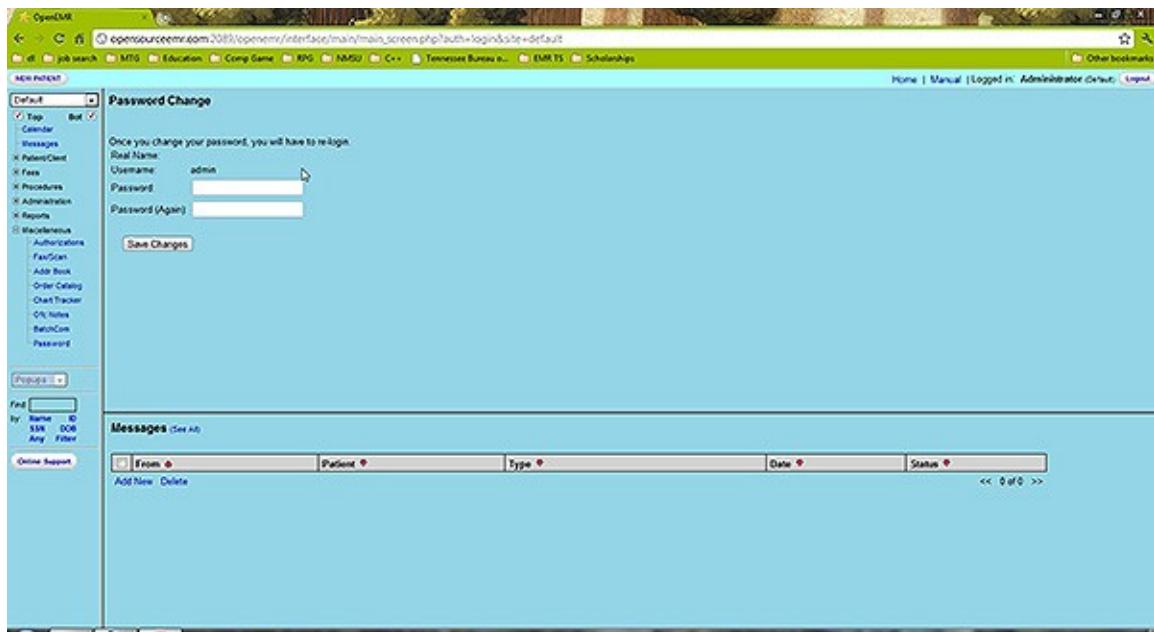
The login screen contains two input boxes: 'Username' and 'Password'. The first time you log in to a fresh installation of OpenEMR you will need to log in as "admin" with a password of "pass". Your administrator may provide you with your own username and password. (Note that the OpenEMR login is case-sensitive.)

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.



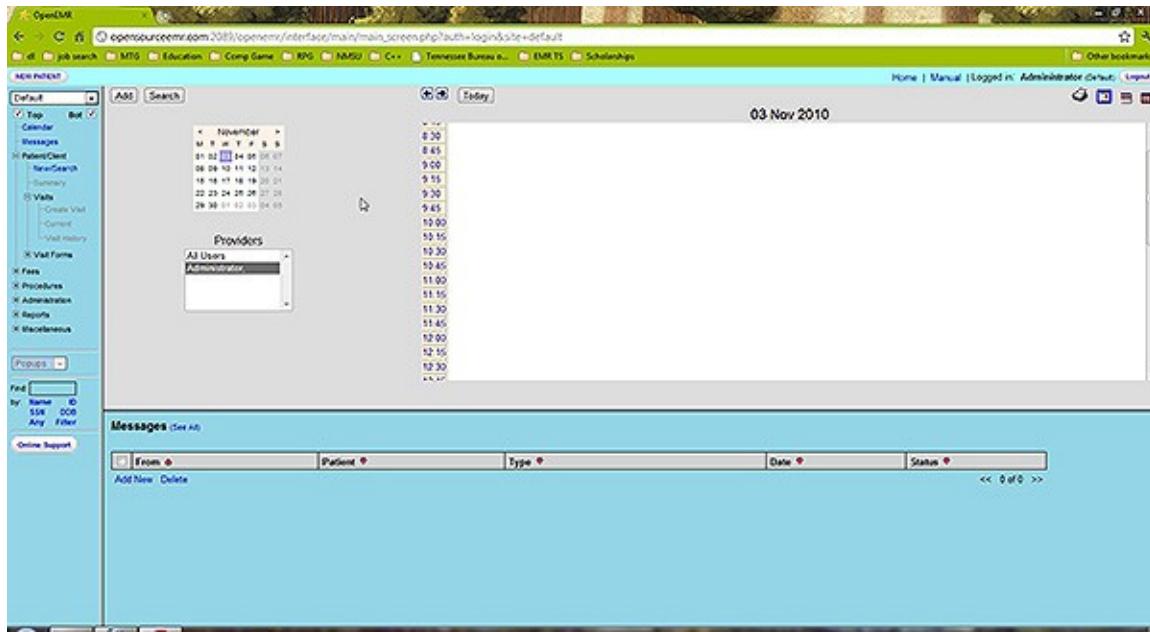
This will bring up the “Password Change” screen. Enter your new password into the two input boxes, make sure you type the same thing into each box. And remember that OpenEMR’s username and passwords are case sensitive.

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.



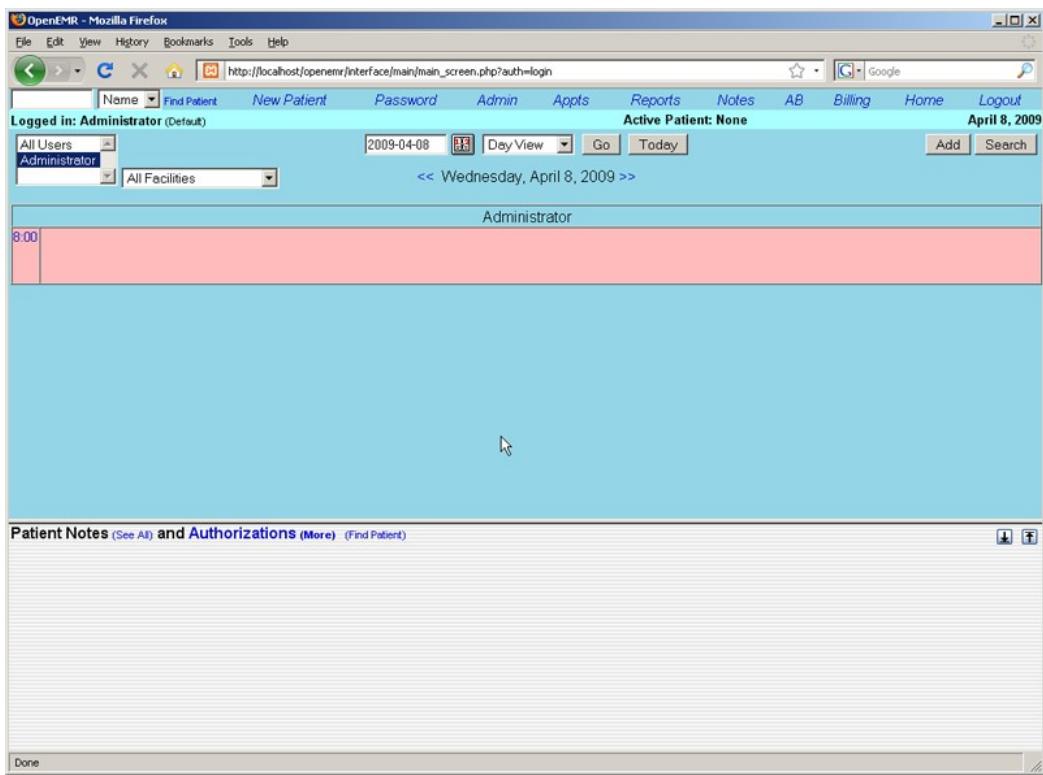
Navigation

OpenEMR can be configured with your choice of three navigation schemes. Traditional, Tree View, or Radio Buttons. You can specify which scheme you would like to use by editing the file `openemr/interface/globals.php` (Detailed instructions can be found [here](#).)

Traditional

The Traditional navigation scheme uses context-sensitive menus located at the top of the screen, which change depending on what page is being viewed. The patient search function is also located at the top left corner of the screen.

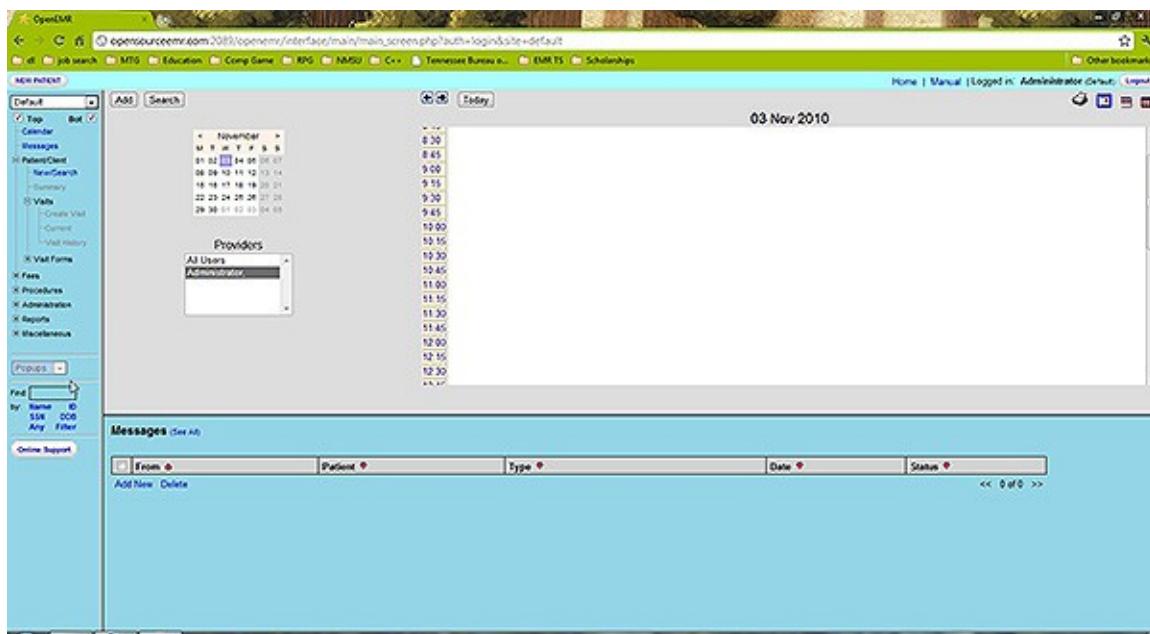
In the Traditional navigation scheme related pages are linked. Pages load simultaneously to facilitate the data entry process.



Tree View

The Tree View is the default navigation scheme for OpenEMR 3.2. This 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.

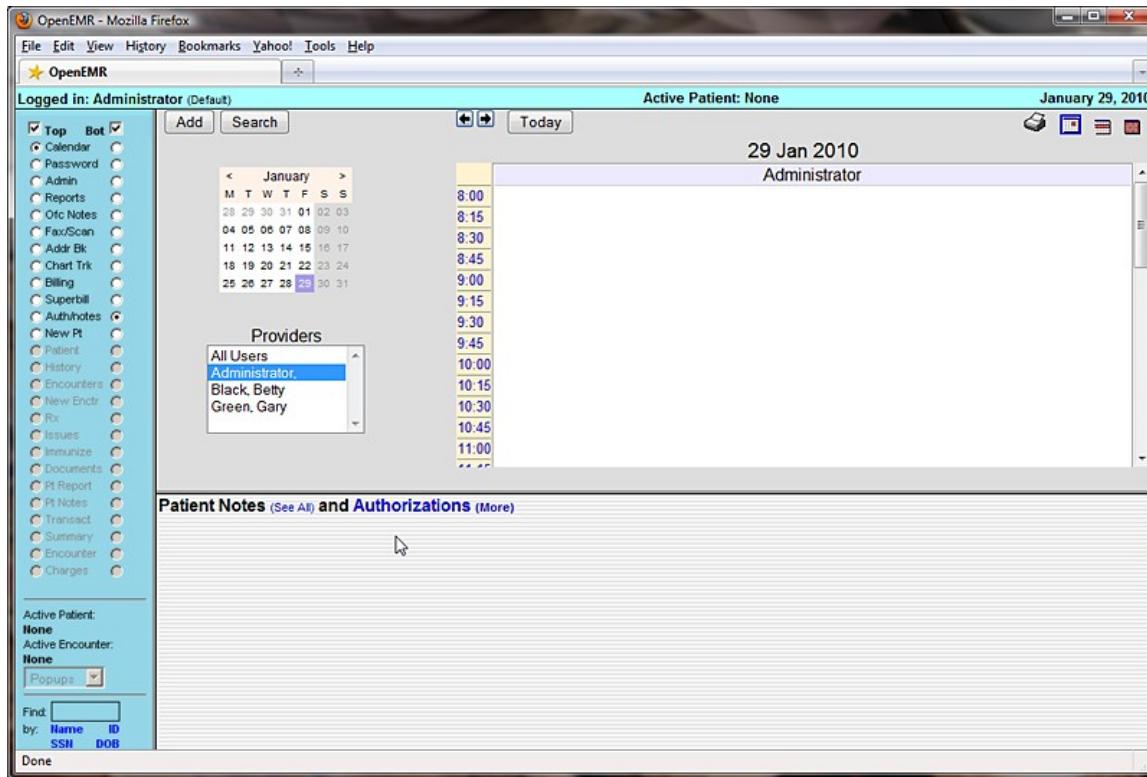


Radio Buttons

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.

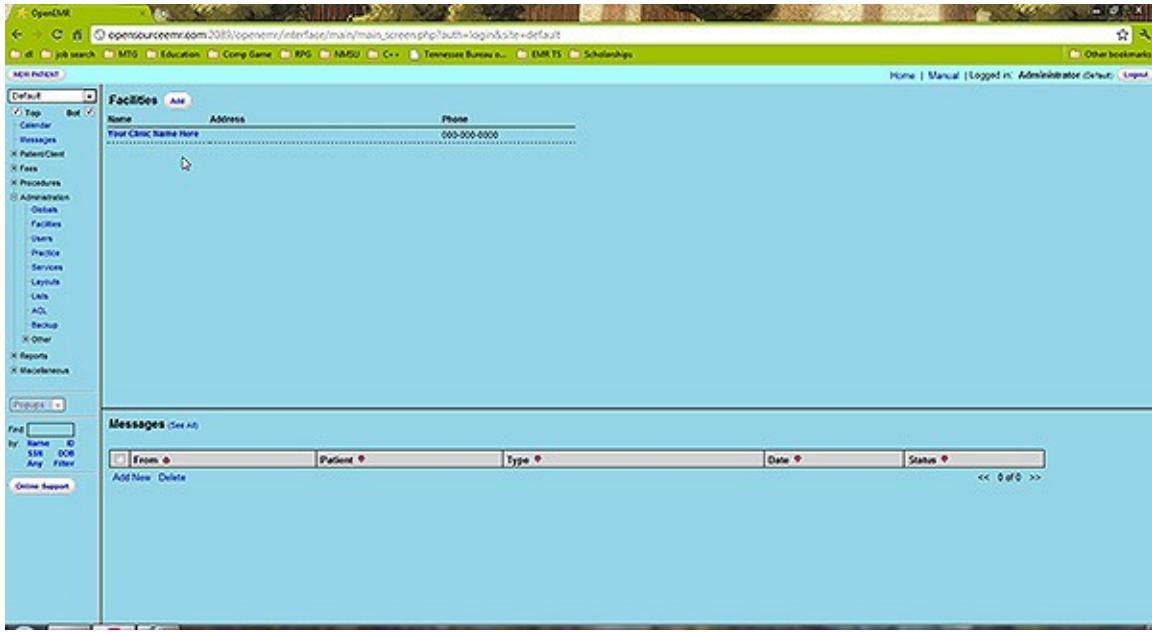
For the purpose of this Users Guide, we will assume you are using the default navigation scheme (Tree View). A complete cross reference of menu items for both the Radio Button and the Tree View navigation schemes can be found [here](#).



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.

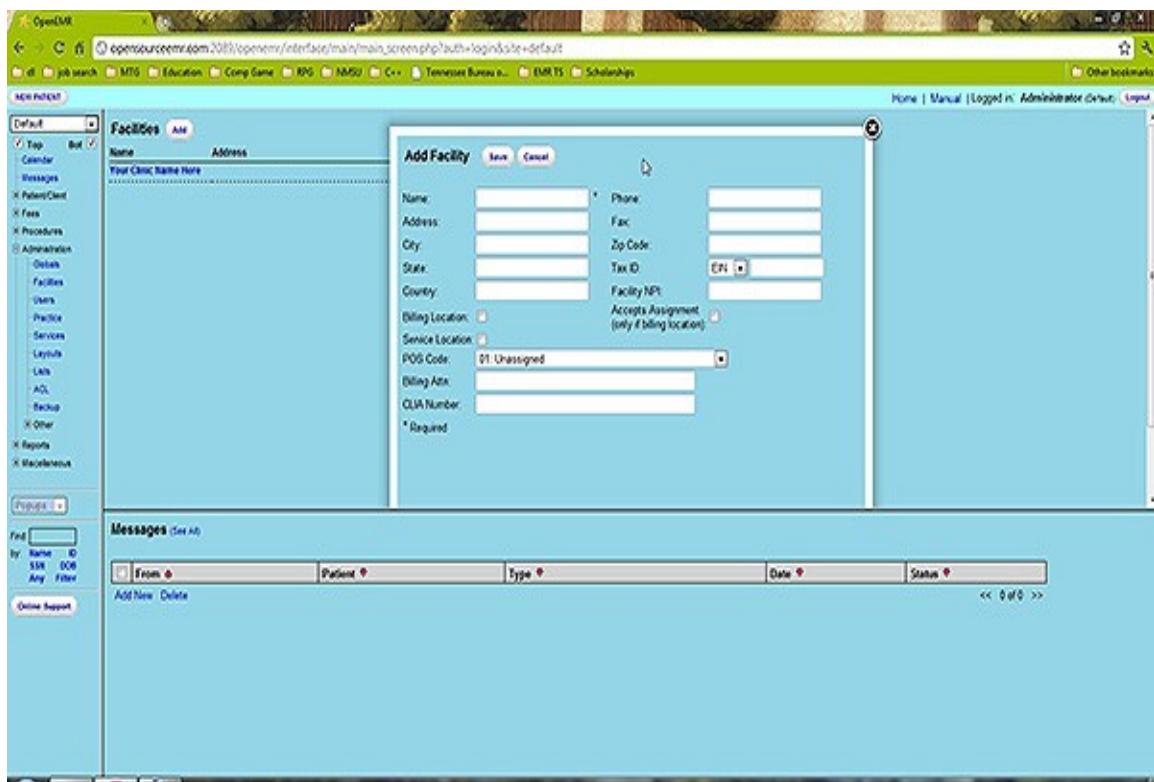


This is one of several pages within the Administration section of OpenEMR. Administration also includes sections for managing your facility's Forms, Practice information, Calendar categories, Lists, Database administration, and more. Links to these sections can be found in the left hand navigation list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

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.



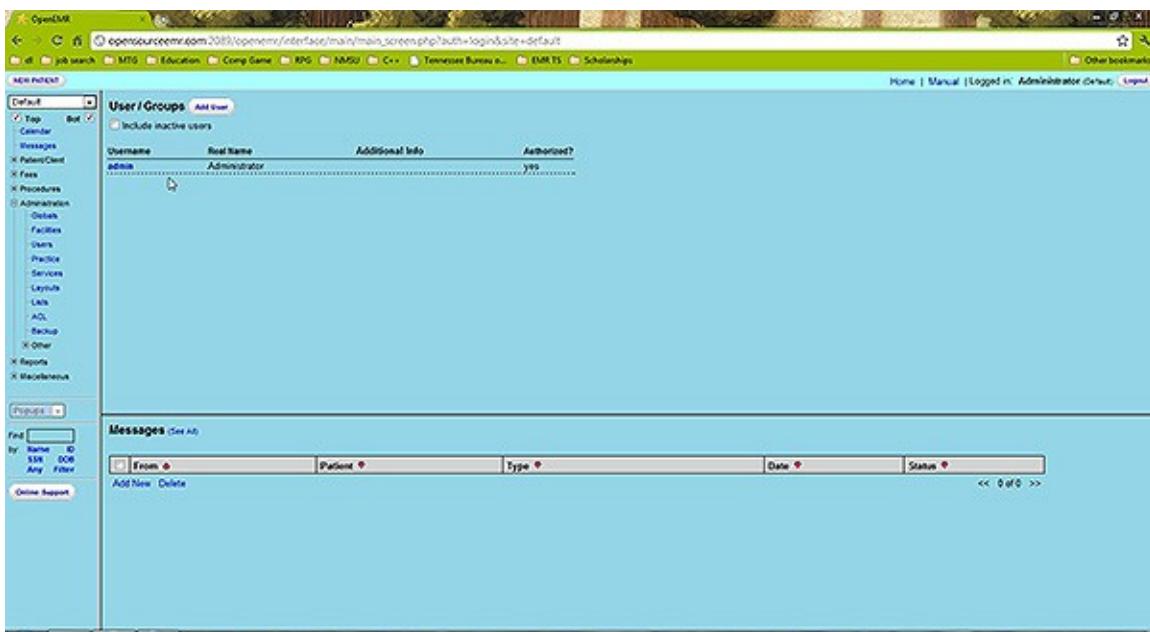
Enter the correct name, address & contact information for your clinic. This information will be used for billing, so make sure to include who to direct billing information to, and enter your facility's NPI and CLIA number. Indicate whether your facility is a billing and/or service location by clicking 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.

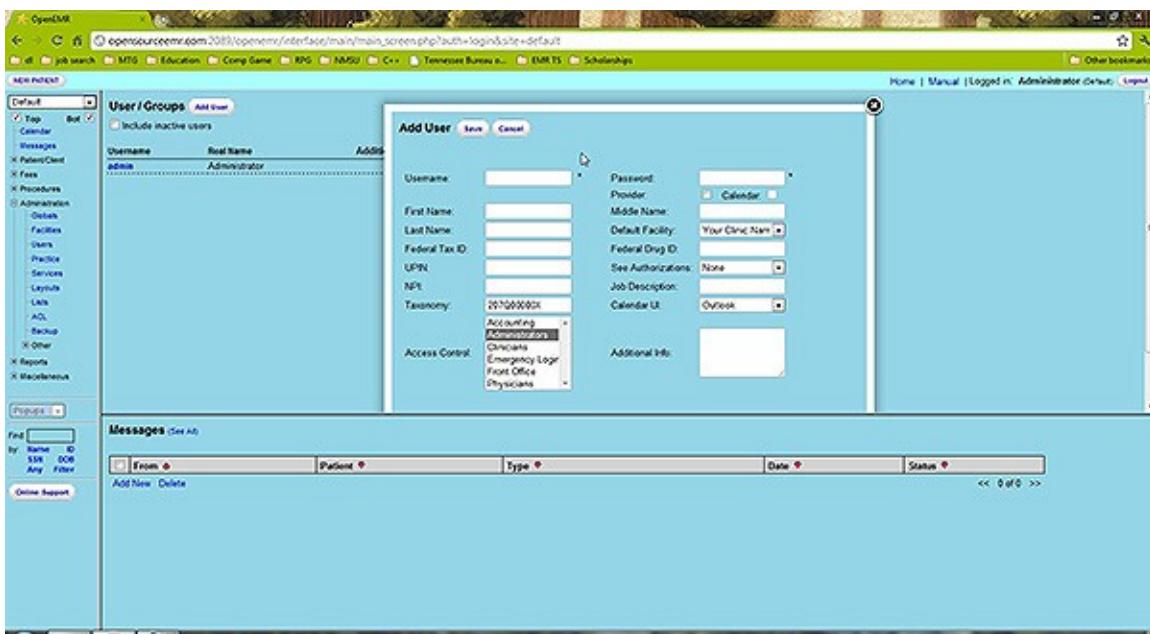
Your clinic may have additional facilities in which care is given, such as a hospital. To create a new facility, click 'Add' and enter the relevant data as you did for the other clinic. Click 'Save' when finished.

User Administration

Clicking 'Administration - Users' in the navigation list will bring you to the User / Group 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.



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 controls, 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.

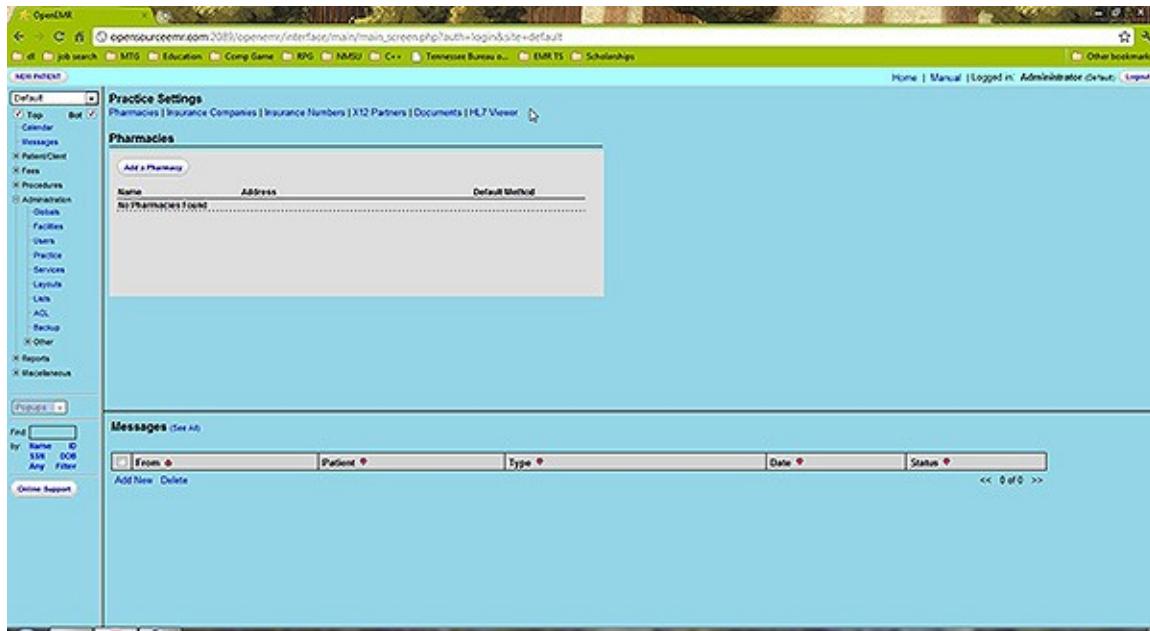
To authorize your practitioners be sure to click the 'Provider' check box. Other facility staff do not need to be authorized. Practitioners will also need their UPIN and Federal Tax ID entered for correct billing, as well as their Federal Drug ID for prescription writing.

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

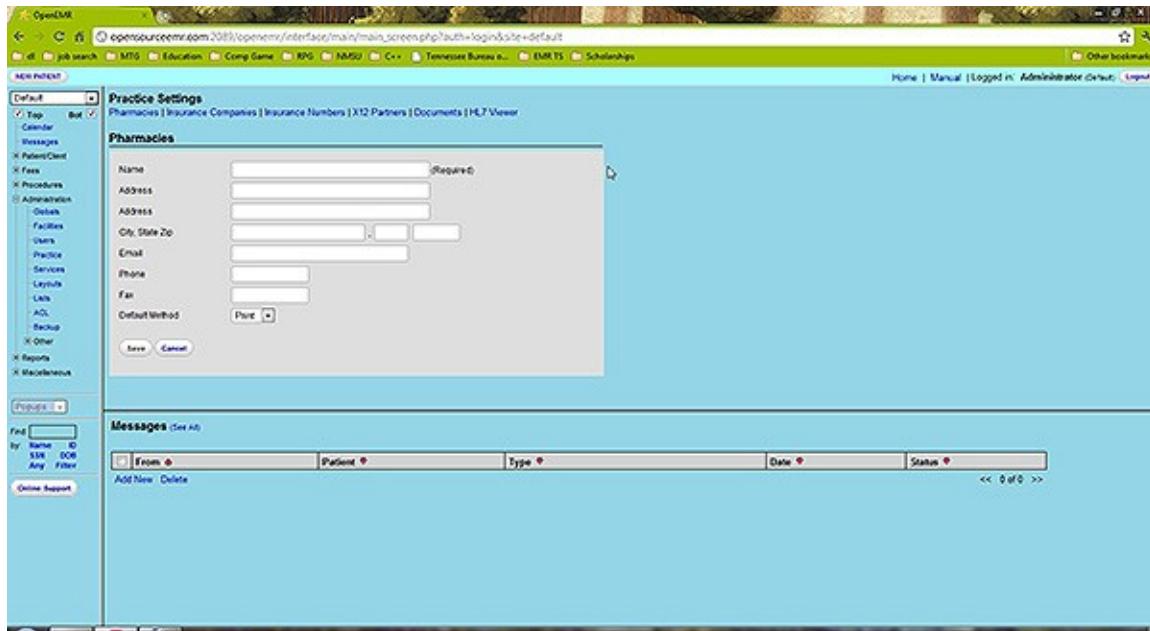
Practice Administration

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.

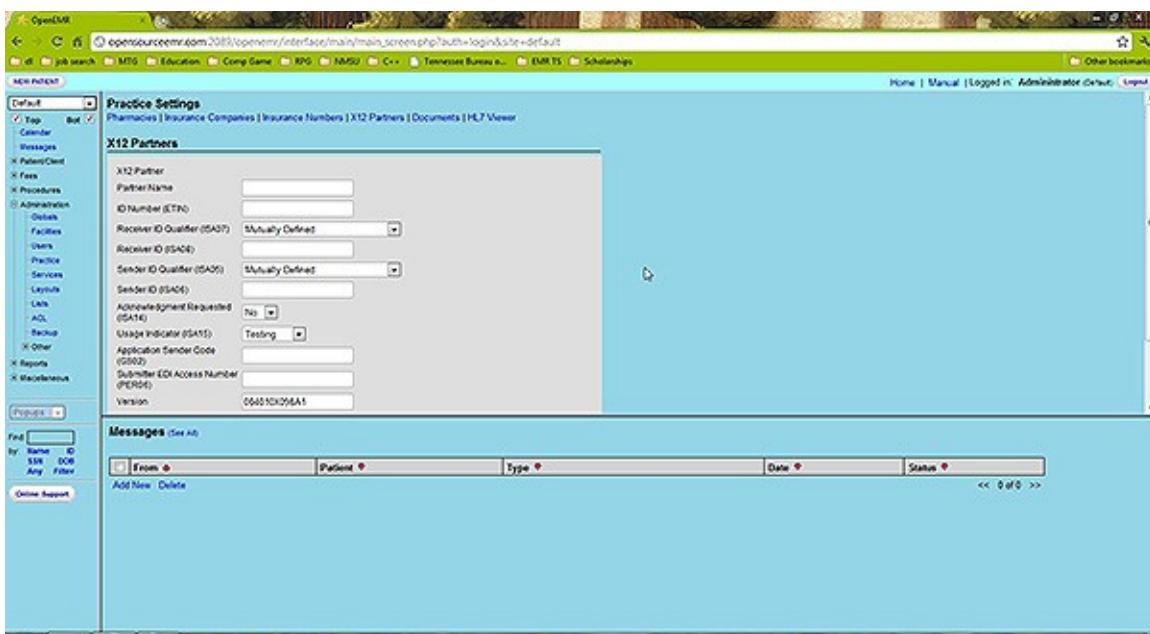


The Practice Administration page initially presents you with the list of your clinics pharmacies. Click the 'Add a Pharmacy' button to enter the contact information for your clinic's pharmacy. A drop down menu lets you select the preferred method for transferring prescription information. Once you've entered the correct information, click 'Save' to add your new pharmacy.



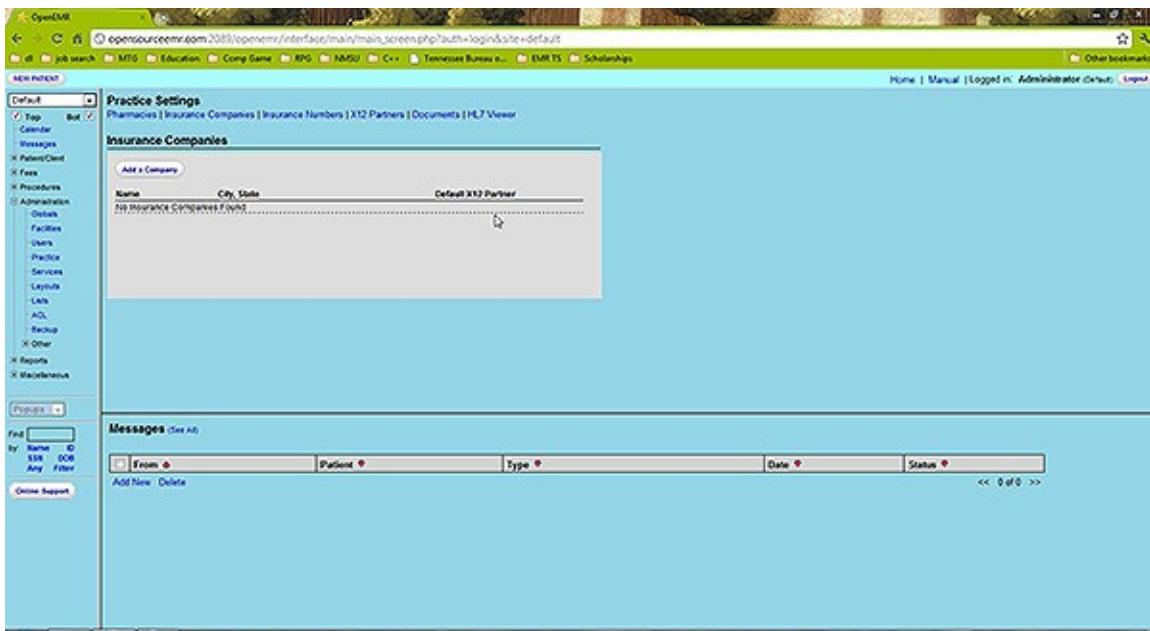
Before setting up any insurance companies, you'll want to enter your X12 Partner information. These are the clearinghouses or large payers to whom you will send electronic billing. Most practices will probably just use a single clearinghouse.

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

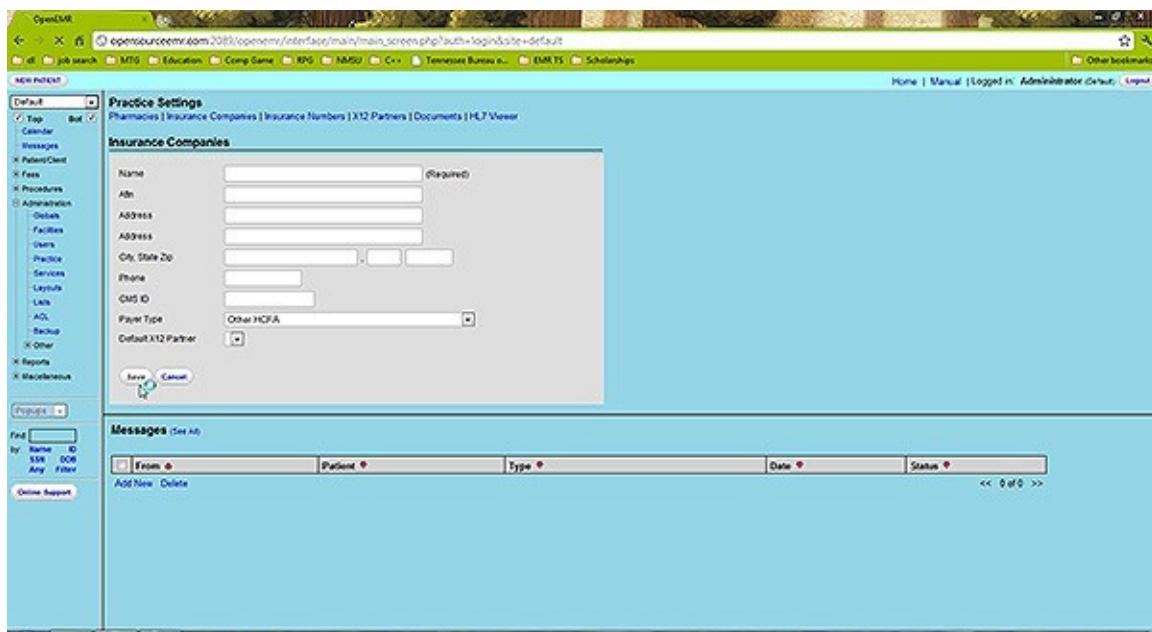


The ID numbers that you enter here will need to be provided to you by the clearinghouse/partner. The Version number refers to the version of the X12 837p protocol specification used and should probably not be changed. Click 'Save' to save the information you've entered.

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.

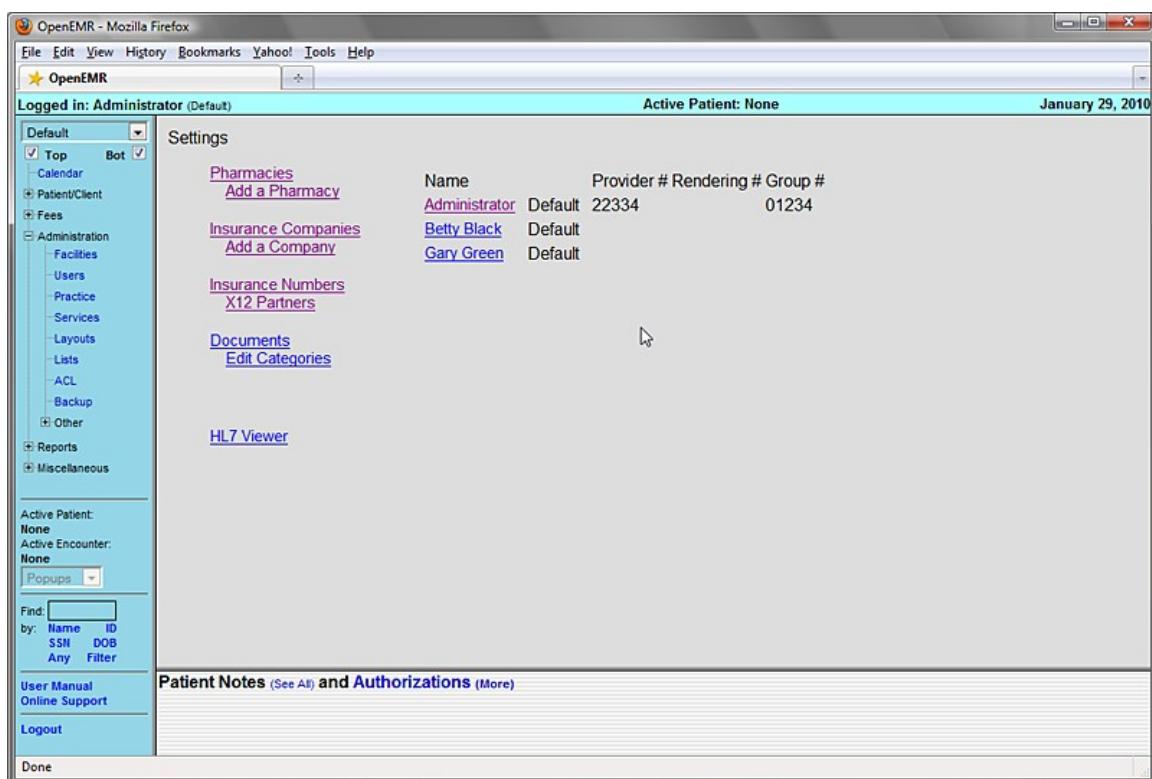


Once you have entered the correct information, click 'Save' to save any changes, or add the new company to the list.

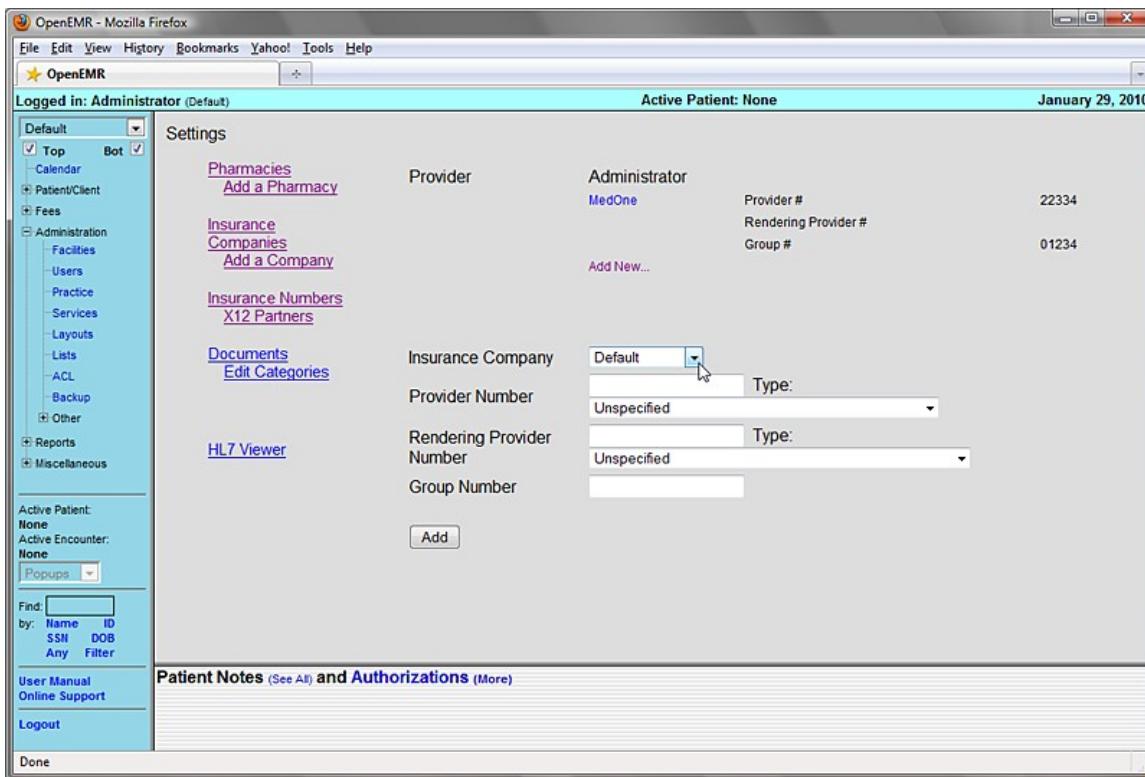


In practice, many insurance companies have multiple insurance plans with a separate billing address for each plan. At this time, you will need to add each plan as a separate insurance company.

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.



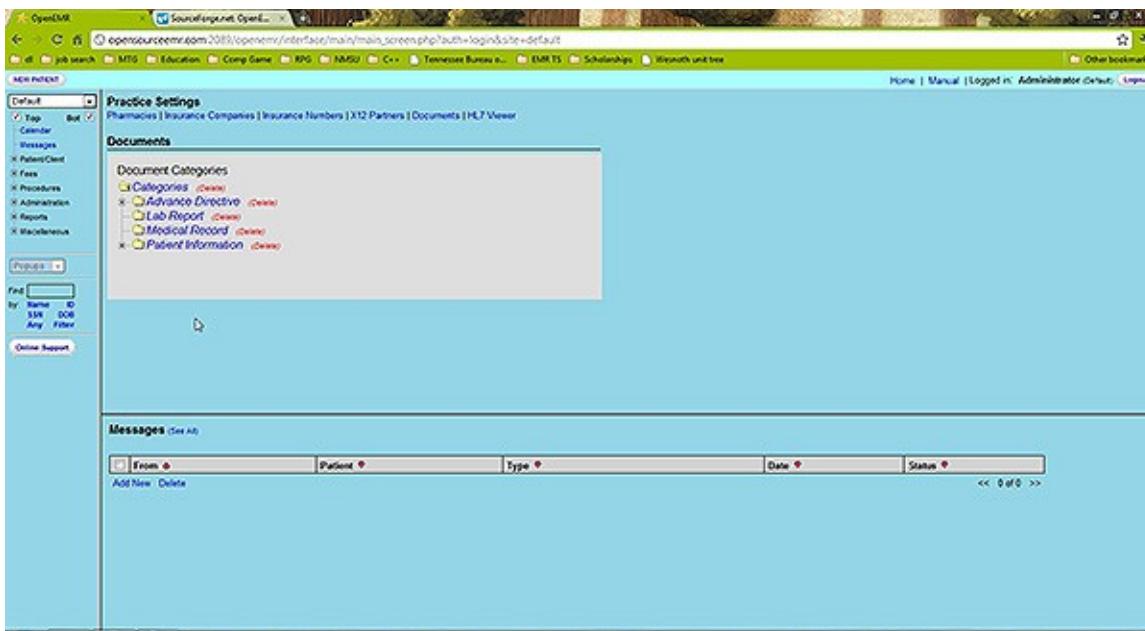
Click on a provider's name to bring up a list of insurance companies and the corresponding ID numbers that have been entered for that provider.



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.

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'.



Lists

Select 'Lists' from the menu at left. This brings you to OpenEMR's List Management system. This is where many of the selection lists within OpenEMR are stored and edited. Before you begin using OpenEMR you will need to populate these lists with data appropriate to your clinic.



Select 'State' from the drop-down list. OpenEMR comes configured with only one state by default. If your clinic sees patients from only one state you can simply replace the default state by clicking in the 'ID' and 'Title' fields and replacing them with the appropriate information.

Alternatively, you can add multiple states by filling in the empty fields that are provided for you. You can also specify which state you would like to use as the default by selecting the checkbox next to that state.



When you are finished modifying the list, click 'Save'. This will update the list and generates a new set of empty fields should you need to add additional states to the list.

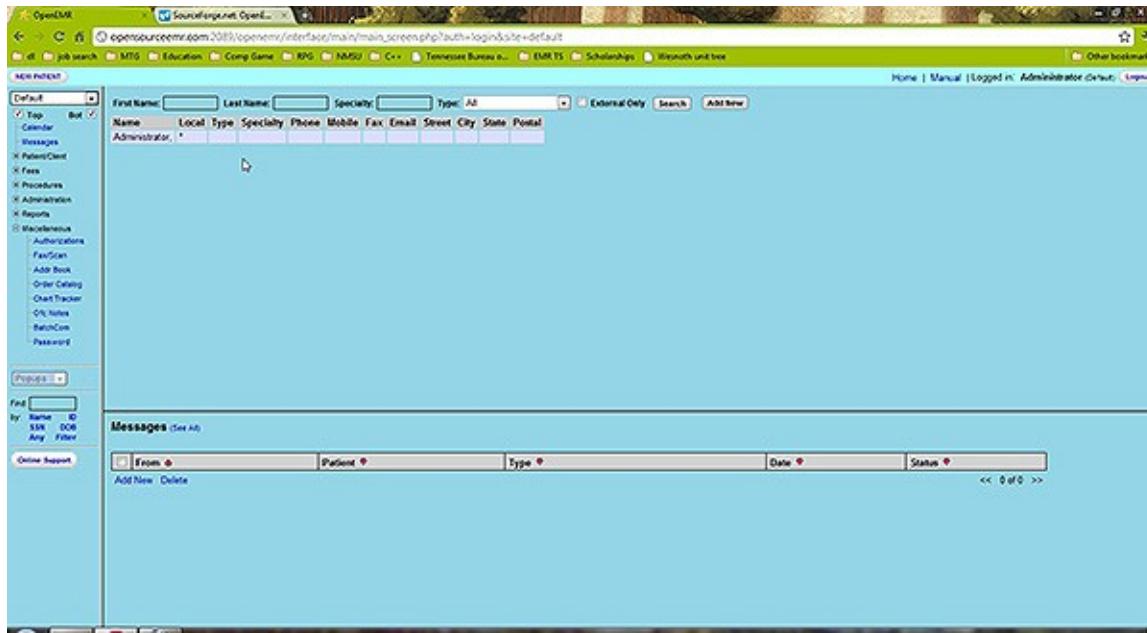
The drop-down contains lists for Race/Ethnicity, common billing codes that appear in the Fee Sheet, Price Levels, common Exams/Tests, etc. All of these lists may be modified in this same manner.



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 Bk' (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.

In the 'Add New Person' dialog box, select a title, 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.

The screenshot shows a 'Mozilla Firefox' window titled 'Add New Person - Mozilla Firefox'. The form contains the following fields:

| | | | | |
|---------------|-------------------------|------------------------------|---------------------------|-----------------------------------|
| Name: | Dr. ▾ | Last: Orange | First: Ophelia | Middle: <input type="text"/> |
| Specialty: | Dermatology | | | |
| Organization: | Universal Health Center | | | |
| Valedictory: | <input type="text"/> | | | |
| Home Phone: | <input type="text"/> | Mobile: <input type="text"/> | | |
| Work Phone: | 503-222-3344 | 2nd: <input type="text"/> | Fax: 503-222-3345 | |
| Assistant: | <input type="text"/> | | | |
| Email: | <input type="text"/> | | | |
| Website: | <input type="text"/> | | | |
| Main Address: | 4456 SE Washington St | | | |
| City: | Portland | State/county: | OR | Postal code: 97215 |
| Alt Address: | <input type="text"/> | | | |
| City: | <input type="text"/> | State/county: | <input type="text"/> | Postal code: <input type="text"/> |
| UPIN: | U78901 | NPI: <input type="text"/> | TIN: <input type="text"/> | Taxonomy: 207Q00000X |
| Notes: | <input type="text"/> | | | |

At the bottom right are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a cursor arrow. At the bottom left is a 'Done' button.

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

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

The screenshot shows the 'OpenEMR' interface in a web browser. On the left is a sidebar with a tree view of menu items. The main area displays a list of patients:

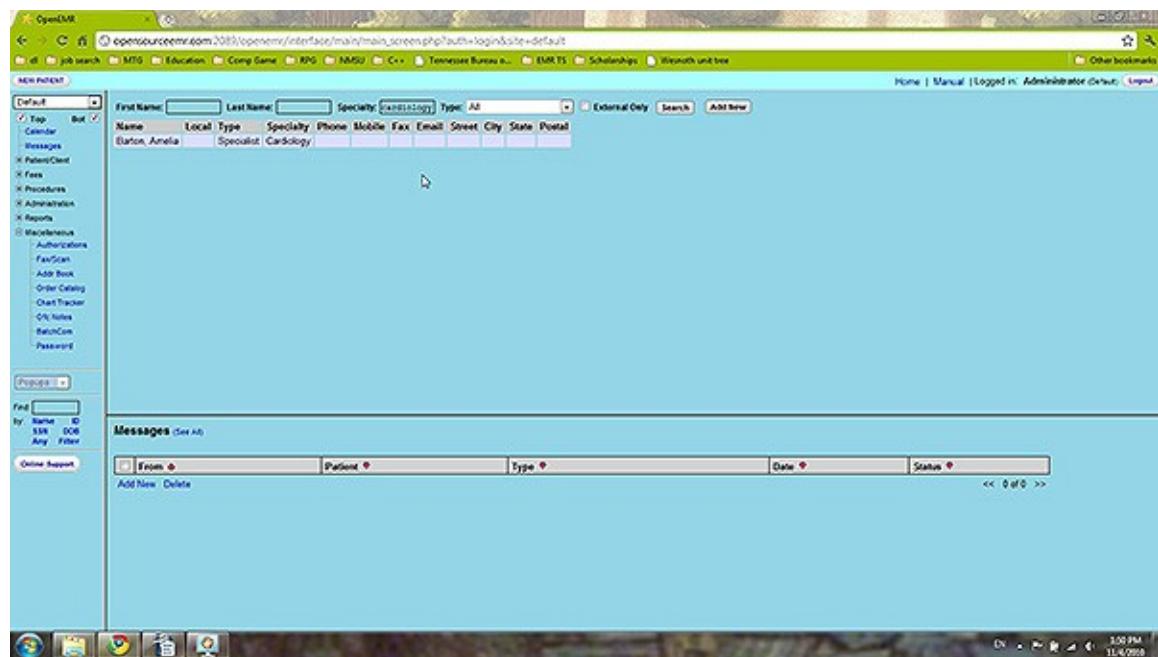
| Name | Local Type | Specialty | Phone | Mobile | Fax | Email | Street | City | State | Postal |
|----------------|---------------|------------|------------|--------|-----|-------|--------|------|-------|--------|
| Administrator | Administrator | Specialist | Cardiology | | | | | | | |
| Darion, Amelia | | | | | | | | | | |

Below the patient list is a 'Messages' section with a table:

| From | Patient | Type | Date | Status |
|------|---------|------|------|--------|
| | | | | |

At the bottom of the screen, there is a taskbar with icons for various applications.

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.



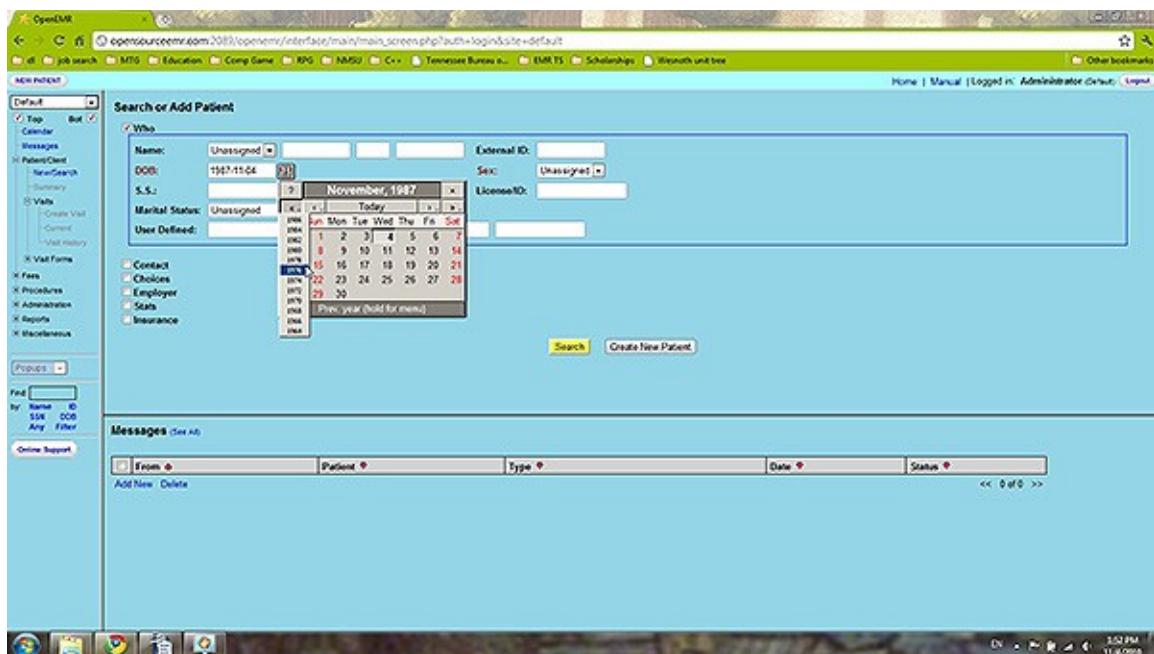
Adding A New Patient

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

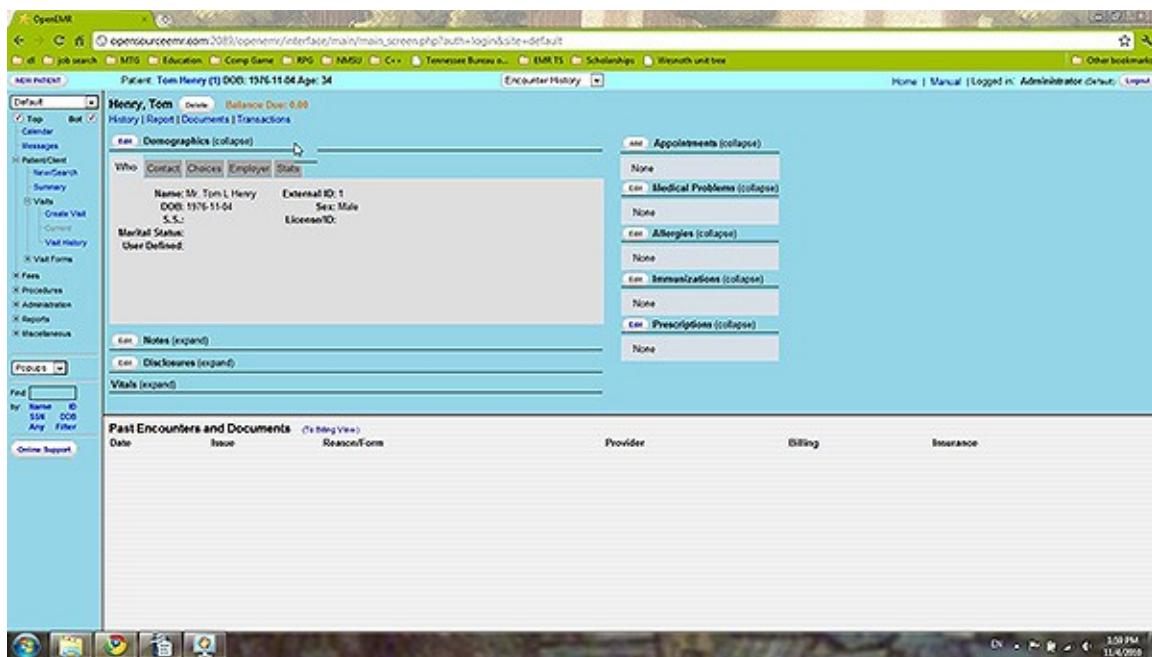
In the Search or Add Patient page enter the patient's name & birth date. If you have an existing chart for this patient, you may enter the chart number under 'External ID'. If you do not enter a number the system will automatically assign one that is equal to its internal patient ID. When you are finished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



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 it's respective field in the proper format (YYYY-MM-DD)

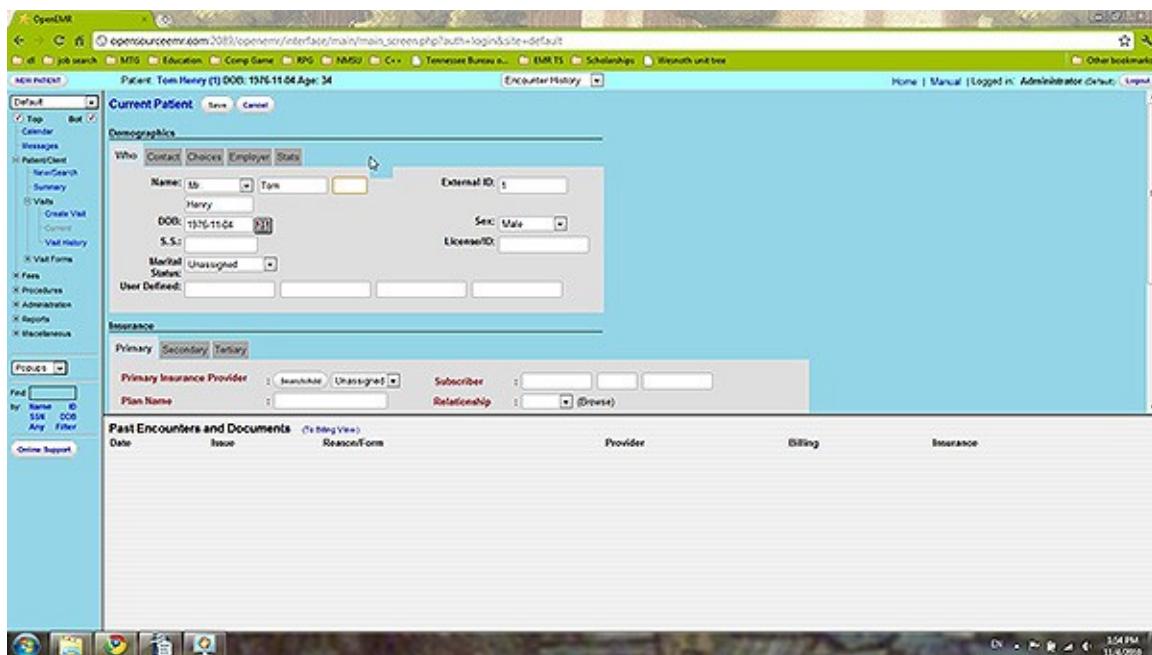
You should now be presented with the Patient Summary Page, which contains a summary of the patient's identifying information, including employment, insurance and provider information in sections that may be expanded or collapsed at will by clicking the link to the right of the desired section. The page 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.

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

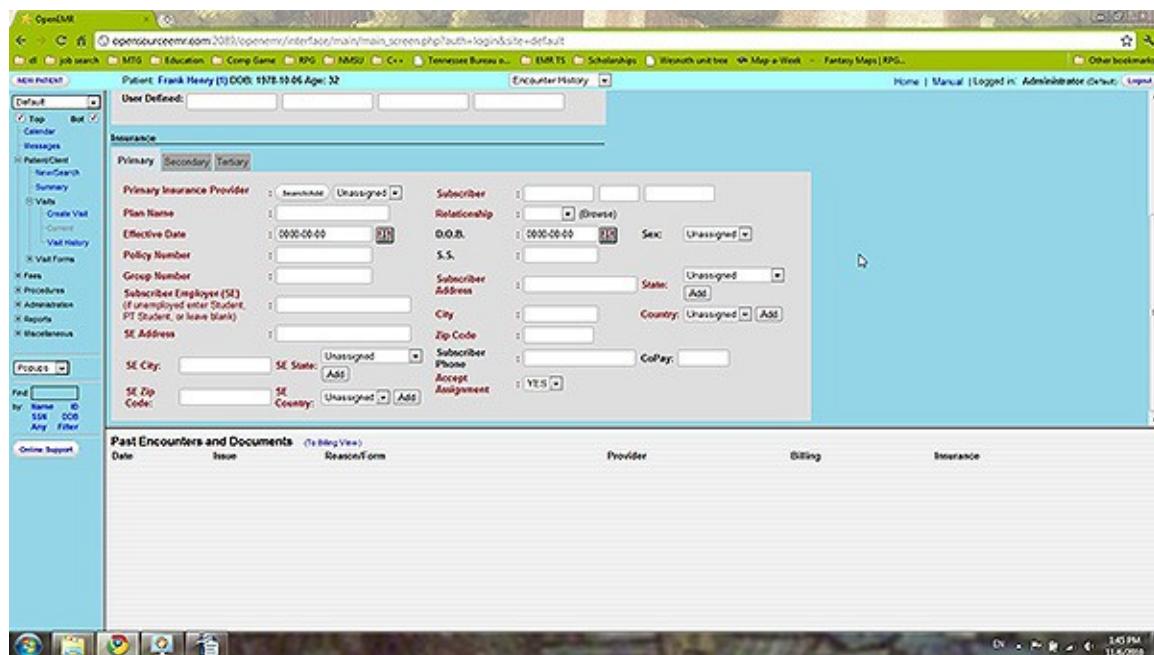


To continue entering patient information click 'Edit' next to the desired section.

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.



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 dialog box containing several fields which are searchable (labeled in green). Entering a partial value into one or more fields and clicking the 'Search' button pops up a second dialog containing a list of all insurance companies matching those parameters.

Insurance Company Search/Add - Google Chrome

opensourceemr.com:2089/openemr/interface/practice/ins_search.php

| | | |
|--|------------|-----|
| Name: | | |
| Attention: | | |
| Address1: | | |
| Address2: | | |
| City/State: | | |
| Zip/Country: | | USA |
| Phone: | | |
| CMS ID: | | |
| Payer Type: | Other HCFA | |
| X12 Partner: | -- None -- | |
| <input type="button" value="Search"/> <input type="button" value="Save as New"/> <input type="button" value="Cancel"/> | | |

List Insurance Companies - Mozilla Firefox

| Name | Attn | Address | City | State | Zip | Phone |
|----------------|------|-----------------|----------|-------|-------|--------------|
| Pacific Health | | 2001 E 123rd St | Pasadena | CA | 90059 | 310-654-3210 |

Done

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.

| Date | Issue | Location/Form | Provider | Billing | Insurance |
|------------|---|---------------|---------------|------------|-----------|
| 2009-02-01 | Vitals | | Administrator | 2009-02-01 | |
| 2008-04-02 | Vitals | | Administrator | 2008-04-02 | |
| 2007-05-01 | Vitals | | Administrator | 2007-05-01 | |
| 2003-07-12 | DTaP, MMR, IPV immunization given Vitals | | Administrator | 2003-07-12 | |
| 2000-06-15 | PCV Immunization | | Administrator | 2000-06-15 | |

Access the desired sections by clicking on the appropriate tab and enter in the patient's data as necessary, then click 'Save'.

Patient History / Lifestyle
for Smith, Joe

| Date | Status | Reason/Form | Provider | Billing | Insurance |
|------------|---|-------------|---------------|------------|-----------|
| 2009-02-01 | Vitals | | Administrator | 2009-02-01 | |
| 2008-04-02 | Vitals | | Administrator | 2008-04-02 | |
| 2007-05-01 | Vitals | | Administrator | 2007-05-01 | |
| 2003-07-12 | DTaP, MMR, IPV immunization given Vitals | | Administrator | 2003-07-12 | |
| 2000-06-15 | PCV Immunization | | Administrator | 2000-06-15 | |

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.

Documents

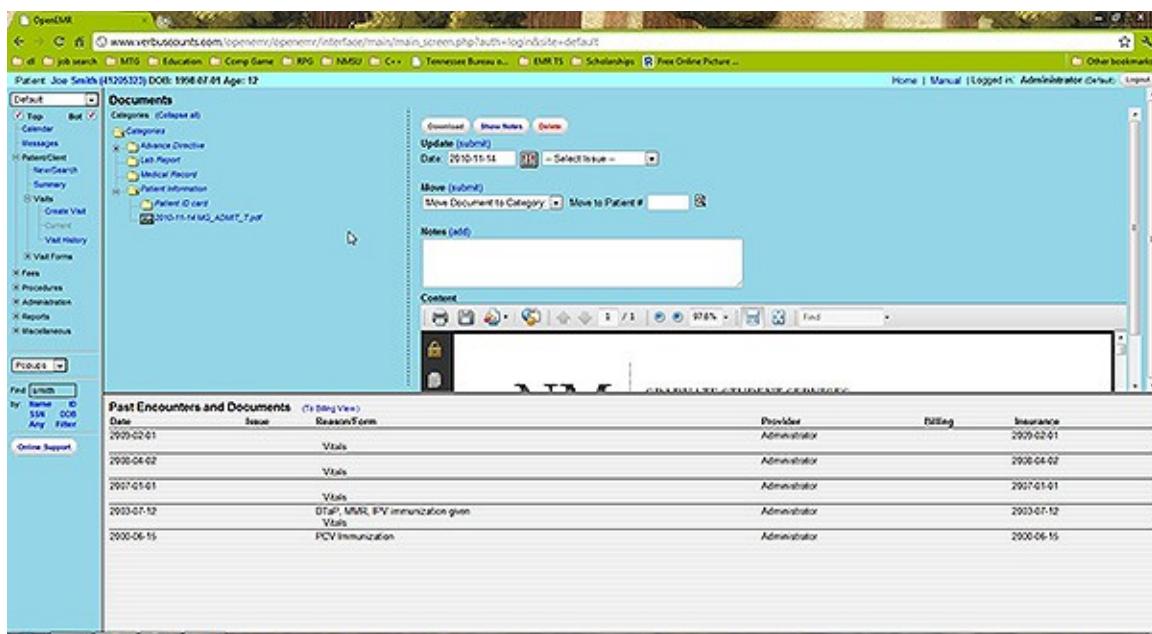
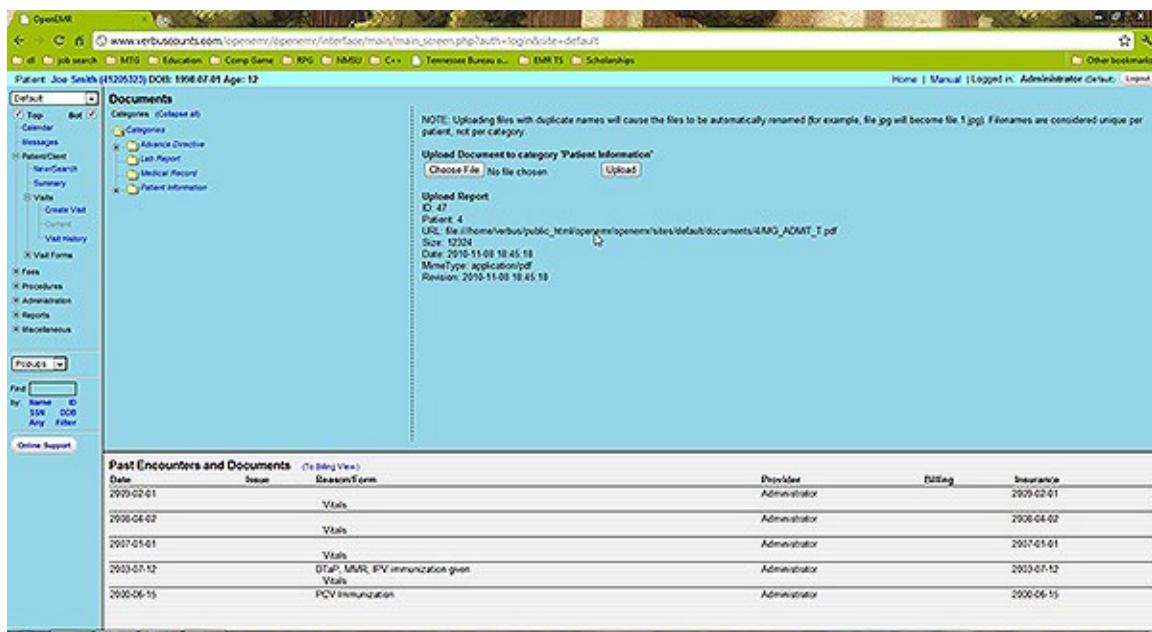
NOTE: Uploading files with duplicate names will cause the files to be automatically renamed (for example, file.jpg will become file_1.jpg). Filenames are considered unique per patient, not per category.

Upload Document to category 'Patient Information'

Choose File: m1540ez.pdf Upload

| Date | Status | Reason/Form | Provider | Billing | Insurance |
|------------|---|-------------|---------------|------------|-----------|
| 2009-02-01 | Vitals | | Administrator | 2009-02-01 | |
| 2008-04-02 | Vitals | | Administrator | 2008-04-02 | |
| 2007-05-01 | Vitals | | Administrator | 2007-05-01 | |
| 2003-07-12 | DTaP, MMR, IPV immunization given Vitals | | Administrator | 2003-07-12 | |
| 2000-06-15 | PCV Immunization | | Administrator | 2000-06-15 | |

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.



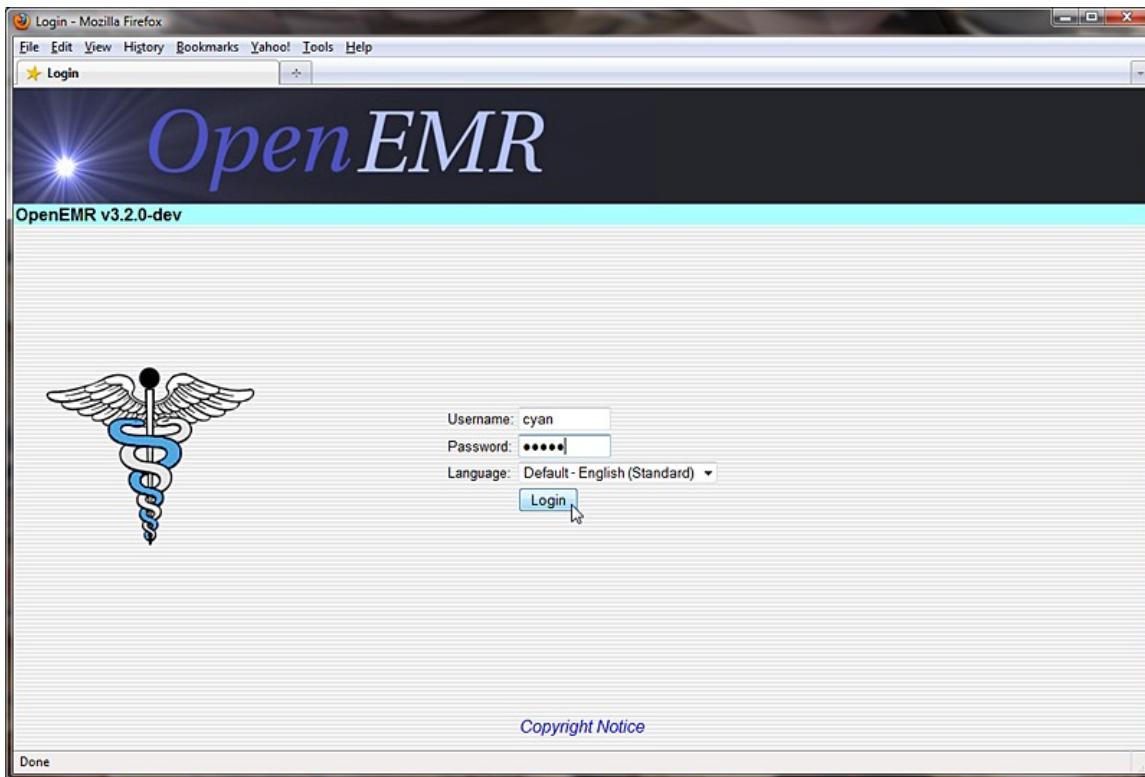
Here you can also attach a note to the document, associate it with a particular issue, or move it to a different category or patient.

Using The Calendar

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

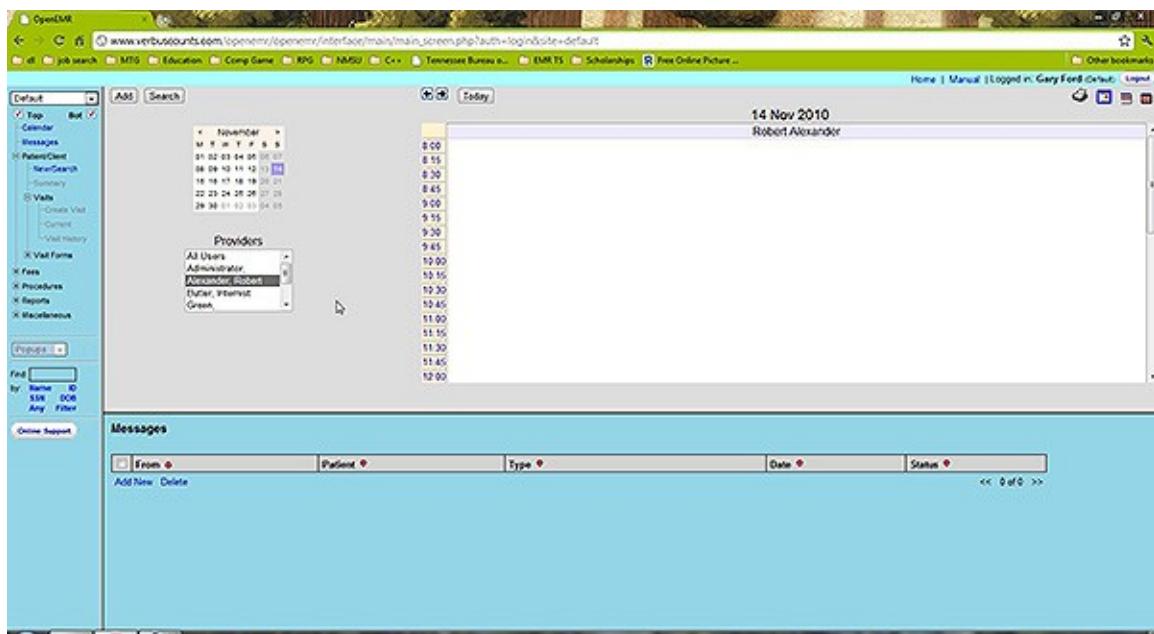
Setting Up Schedules

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 right 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. Choose "In Office" from the 'Category' drop-down list.

| | | |
|---|-----------------------|---|
| Category: | In Office | <input type="radio"/> All day event |
| Date: | 2010-01-29 | <input type="radio"/> Time 8 : 45 AM |
| Title: | In Office | duration 0 minutes |
| Facility: | Your Clinic Name Here | |
| Patient: | Click to select | |
| Provider: | Alexander, Robert | <input checked="" type="checkbox"/> Repeats every workday |
| Pref Cat: | -- None -- | until 2011-01-29 |
| Comments: | | |
| <input type="button" value="Save"/> <input type="button" value="Find Available"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/> | | |

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.

Add New Event - Google Chrome

www.verbuscounts.com/openemr/openemr/interface/main/calendar/add_edit_event.php?startam

| | | |
|---|-----------------------|---|
| Category: | Out Of Office | All day event |
| Date: | 2010-01-29 | Time 5 : 00 PM |
| Title: | Out Of Office | duration 0 minutes |
| Facility: | Your Clinic Name Here | |
| Patient: | Click to select | |
| Provider: | Alexander, Robert | <input checked="" type="checkbox"/> Repeats every workday |
| Status: | - None | until 2011-01-29 |
| Comments: | | |
| <input type="button" value="Save"/> <input type="button" value="Find Available"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/> | | |

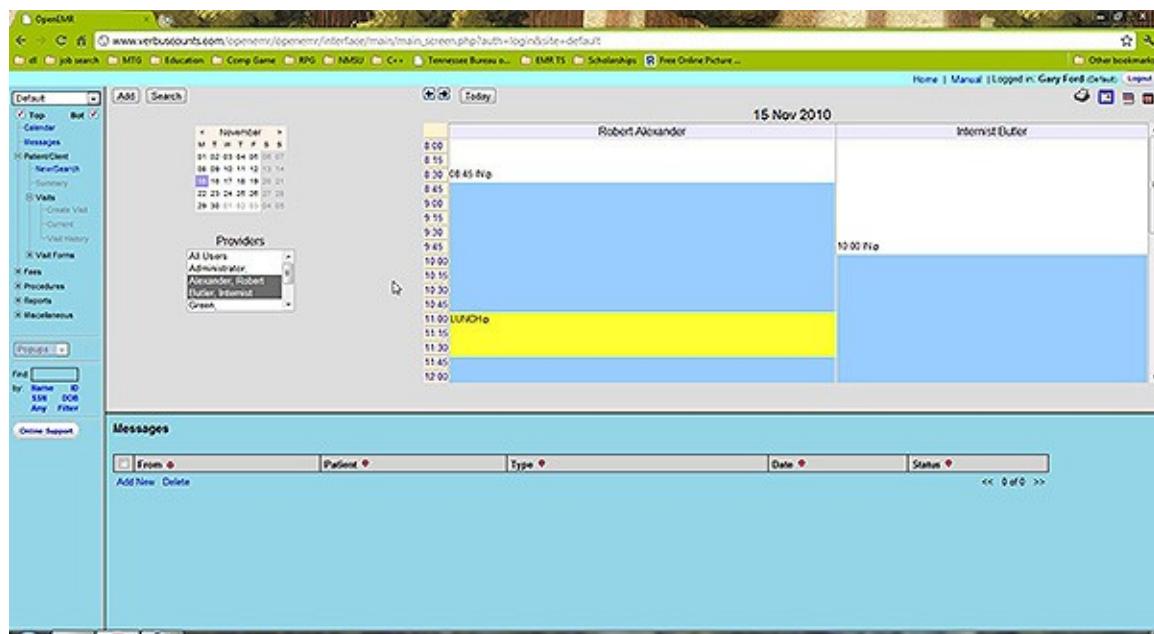
You can also add a lunch break in your practitioners' schedules. This is done the same way, with the exception of the duration, which in this case is non-zero.

Add New Event - Google Chrome

www.verbuscounts.com/openemr/openemr/interface/main/calendar/add_edit_event.php?startam

| | | |
|---|-----------------------|---|
| Category: | Lunch | All day event |
| Date: | 2010-01-29 | Time 11 : 00 AM |
| Title: | Lunch | duration 45 minutes |
| Facility: | Your Clinic Name Here | |
| Patient: | Click to select | |
| Provider: | Alexander, Robert | <input checked="" type="checkbox"/> Repeats every workday |
| Status: | - None | until 2011-01-29 |
| Comments: | | |
| <input type="button" value="Save"/> <input type="button" value="Find Available"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/> | | |

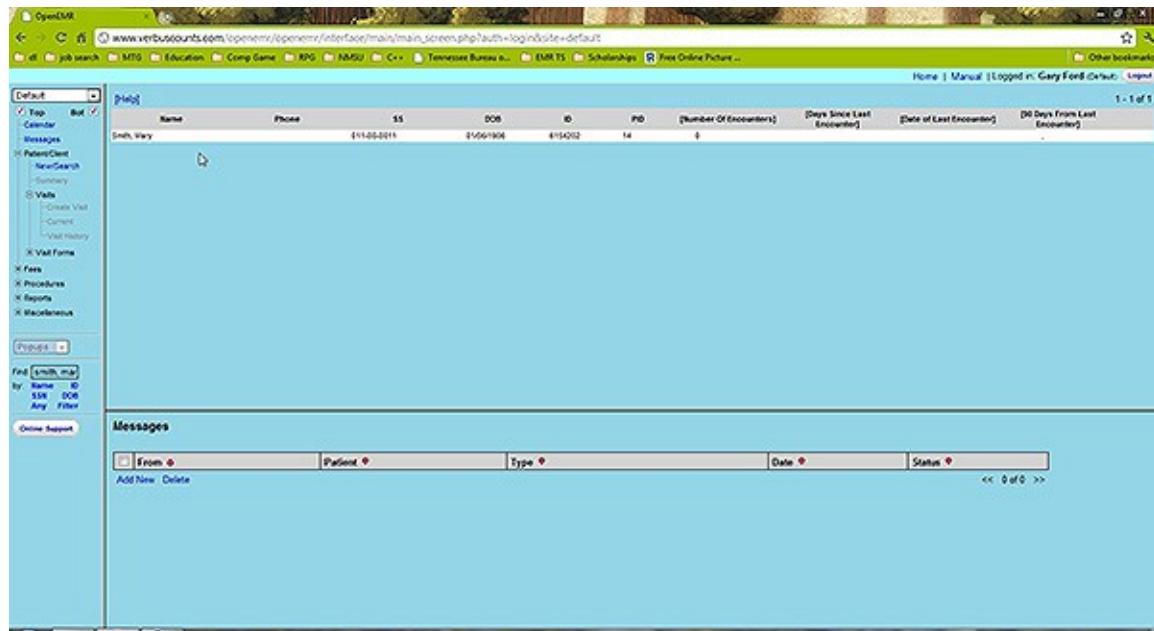
Now you can see your practitioner's full schedule laid out on the Calendar page. Continue setting up the Calendar in this fashion until all your practitioners' schedules have been entered.



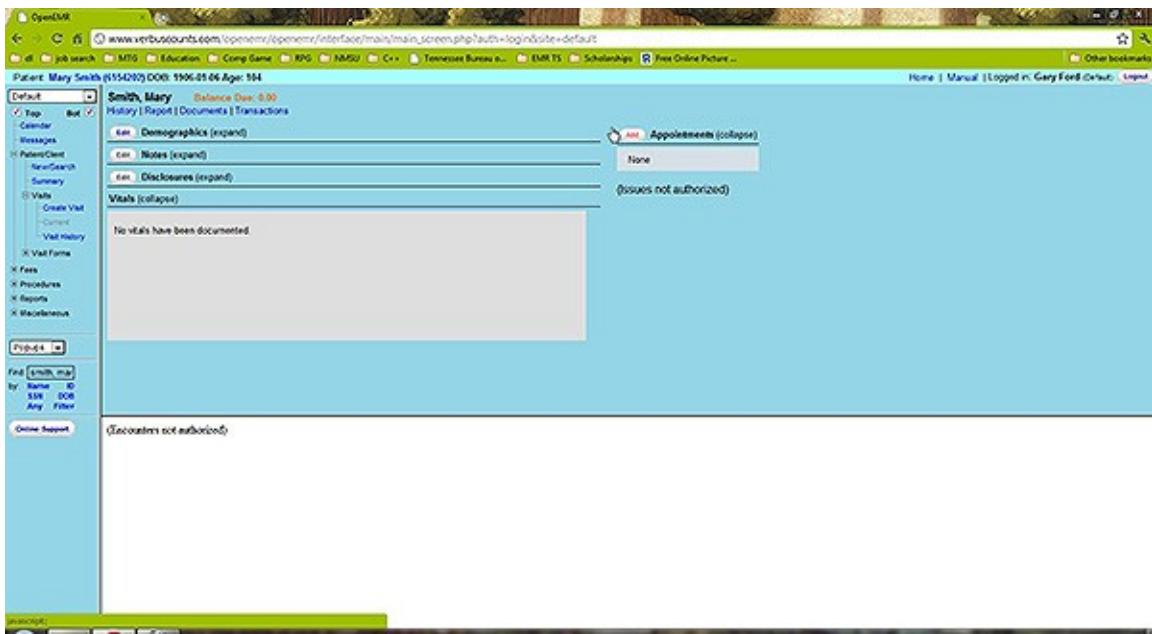
Making Appointments

Now that the clinic and all it's 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.

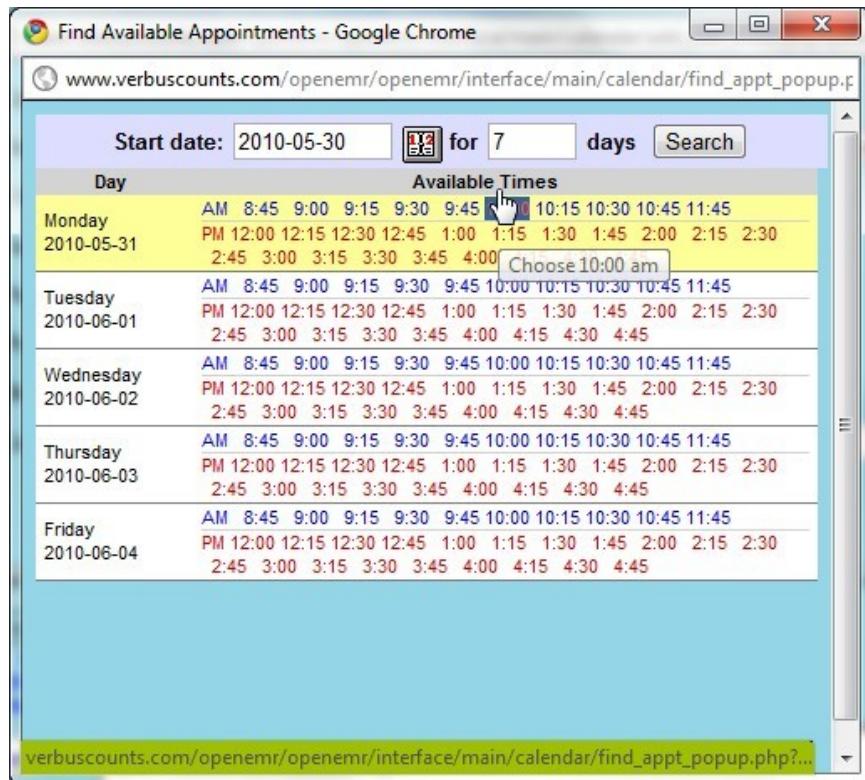


The right-hand side of the Patient Summary shows a list of all current and future appointments for that patient. Click 'expand' next to the Appointments section if the list is not already visible. Click 'Add' to schedule an office visit.

This is a screenshot of the 'Add New Event' dialog box from Google Chrome. It includes fields for Category (set to 'Established Patient'), Date (2010-05-30), Time (1:00 PM), Title (Established Patient), Facility (Your Clinic Name Here), Patient (Smith, Mary), Provider (Alexander, Robert), Status (- None), and Comments. Buttons at the bottom include Save, Find Available, Delete, and Cancel.

This will present you with the same 'Add New Event' dialog used earlier. This time "Established Patient" is selected as the Category. 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.

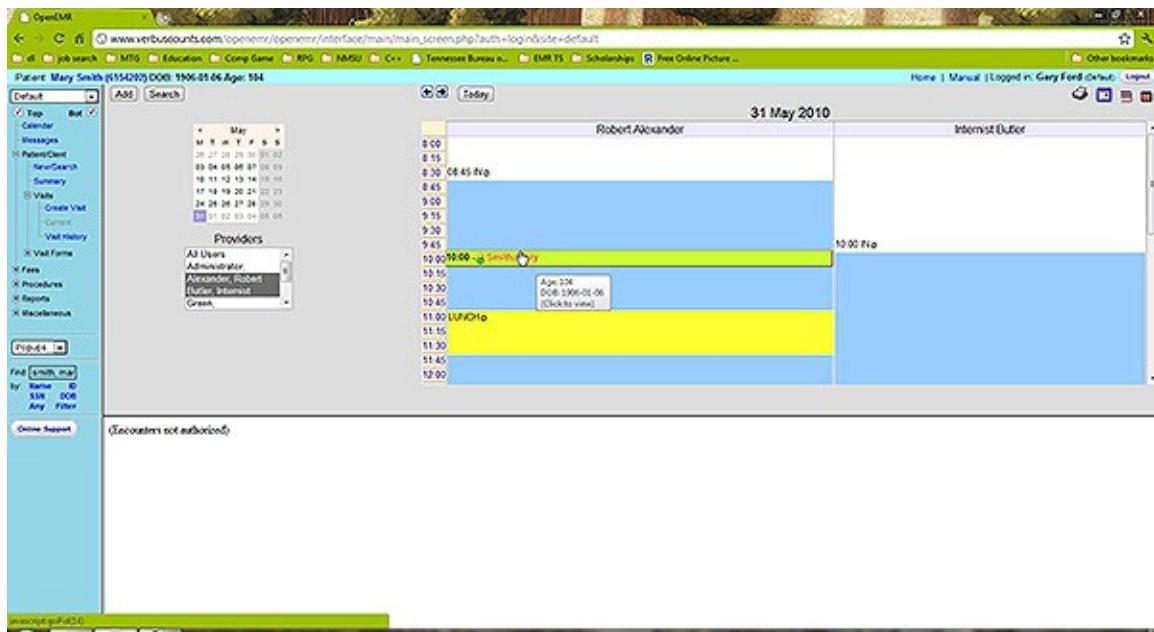
Click 'Find Available' to see a list of appointment times available for that provider for the next 7 days. You can change the start date or the number of days shown and click 'Search' to display a new list using those parameters.



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'.

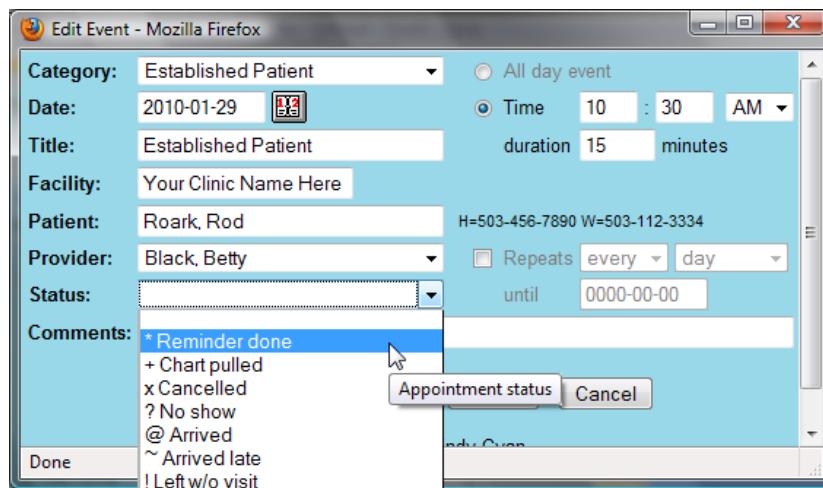
Return to the calendar using the navigation menu on the left. Advancing to the appropriate date, using the arrows at the top of the screen, shows the new appointment listed in the provider's schedule. Mousing over the patient's name displays a tool-tip with information about that patient, such as date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



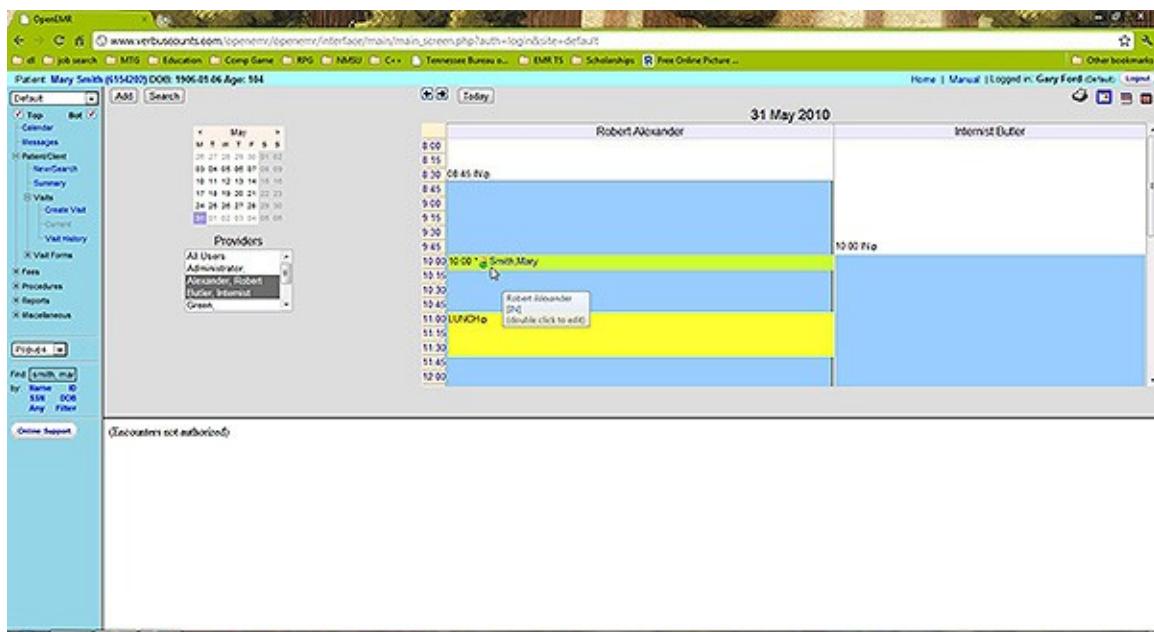
Appointment Status

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.



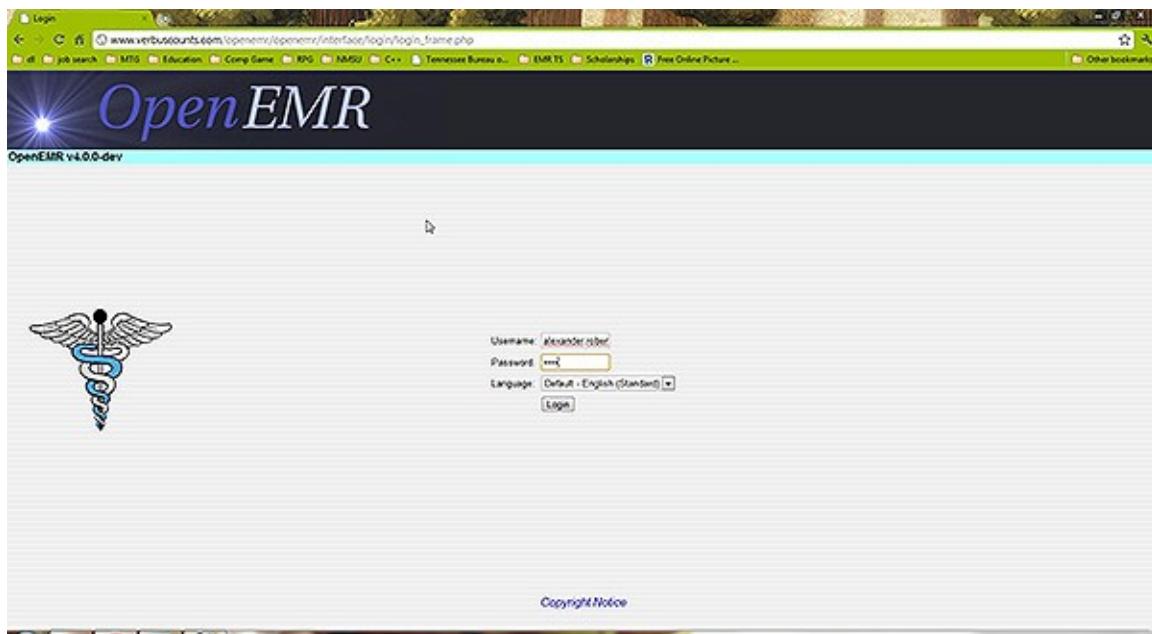
You can also type a note into the 'Comments' line if more information is needed. Click 'Save' to update the status of the appointment.



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.

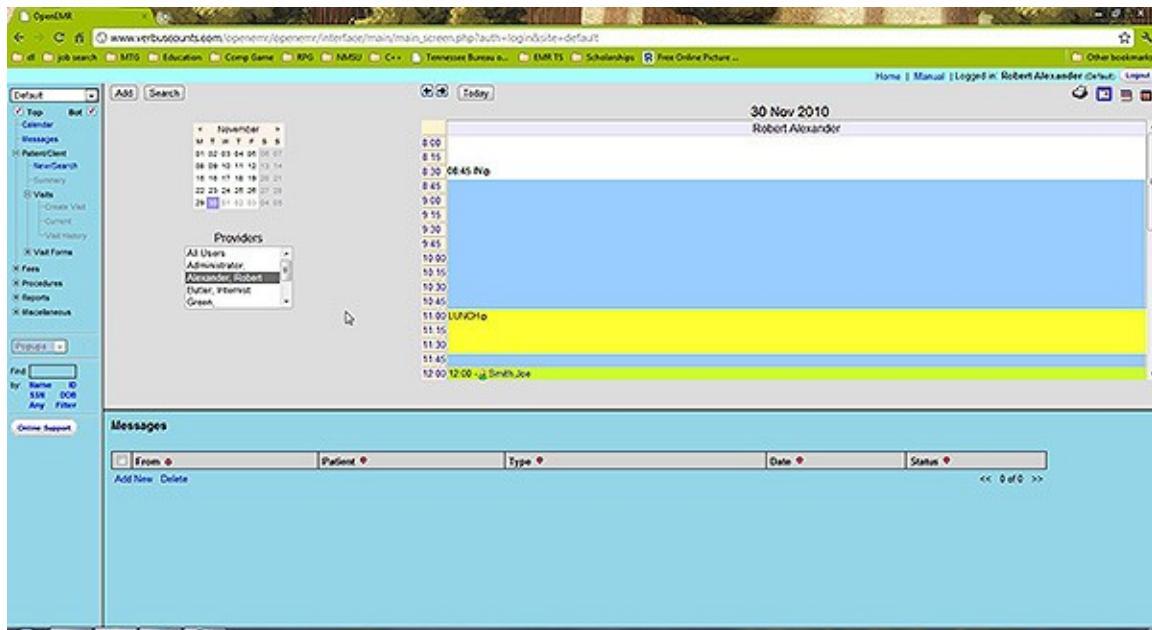
Encounters & Coding

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 patients 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.

The screenshot shows the OpenEMR interface for patient Joe Smith. The top navigation bar includes links for job search, MTG, Education, Comp Game, RPG, NMU, C++, Tennessee Bureau, EMRS, Scholarships, and Free Online Picture. The main menu on the left has sections for Patient Client, New Search, Summary, Visits, Visit Forms, Fees, Procedures, Reports, and Miscellaneous. A search bar at the top allows filtering by Name, ID, SSN, DOB, and Any Filter. The main content area displays the patient's demographic information (Smith, Joe, Balance Due: \$0.00, Age: 12), vital signs (Weight: 70.00 lb (31.75 kg) Height: 56.00 in (142.24 cm) BMI: 16 kg/m²), and medical history (Medical Problems: None, Allergies: penicillin, Immunizations: 2003-07-12 - DTap 1, 2003-07-12 - IPV 1, 2003-08-14 - Pneumococcal Conjugate 1, 2003-07-12 - VAR 1). Below this is a section for Appointments, Disclosures, and Vital Signs. At the bottom, the 'Past Encounters and Documents' table lists previous visits and immunizations:

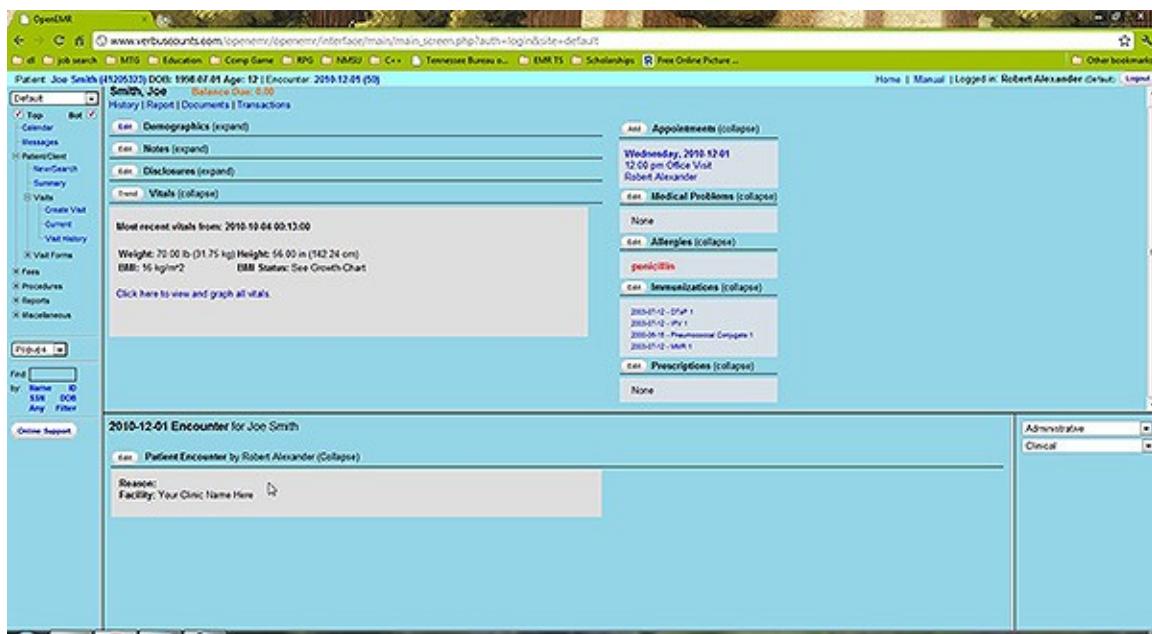
| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|---|-------------|---------------|------------|-----------|
| 2003-02-01 | Vitals | | Administrator | 2003-02-01 | |
| 2003-04-02 | Vitals | | Administrator | 2003-04-02 | |
| 2003-05-01 | Vitals | | Administrator | 2003-05-01 | |
| 2003-07-12 | DTaP, MMR, IPV immunization given Vitals | | Administrator | 2003-07-12 | |
| 2003-06-15 | PCV immunization | | Administrator | 2003-06-15 | |

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 screenshot shows the OpenEMR interface for patient Joe Smith, specifically the Patient History & Lifestyle section. The top navigation bar and main menu are identical to the previous screenshot. The main content area displays the patient's family history, risk factors, and exam/test results. Below this is the same 'Past Encounters and Documents' table as the previous screenshot:

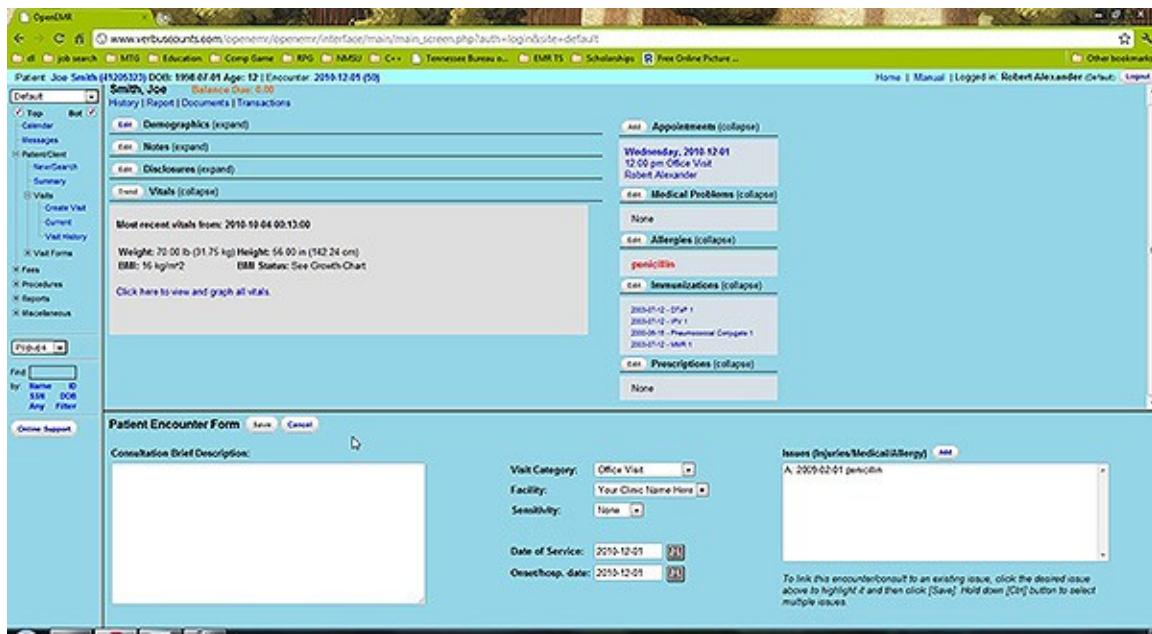
| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|---|-------------|---------------|------------|-----------|
| 2003-02-01 | Vitals | | Administrator | 2003-02-01 | |
| 2003-04-02 | Vitals | | Administrator | 2003-04-02 | |
| 2003-05-01 | Vitals | | Administrator | 2003-05-01 | |
| 2003-07-12 | DTaP, MMR, IPV immunization given Vitals | | Administrator | 2003-07-12 | |
| 2003-06-15 | PCV immunization | | Administrator | 2003-06-15 | |

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.

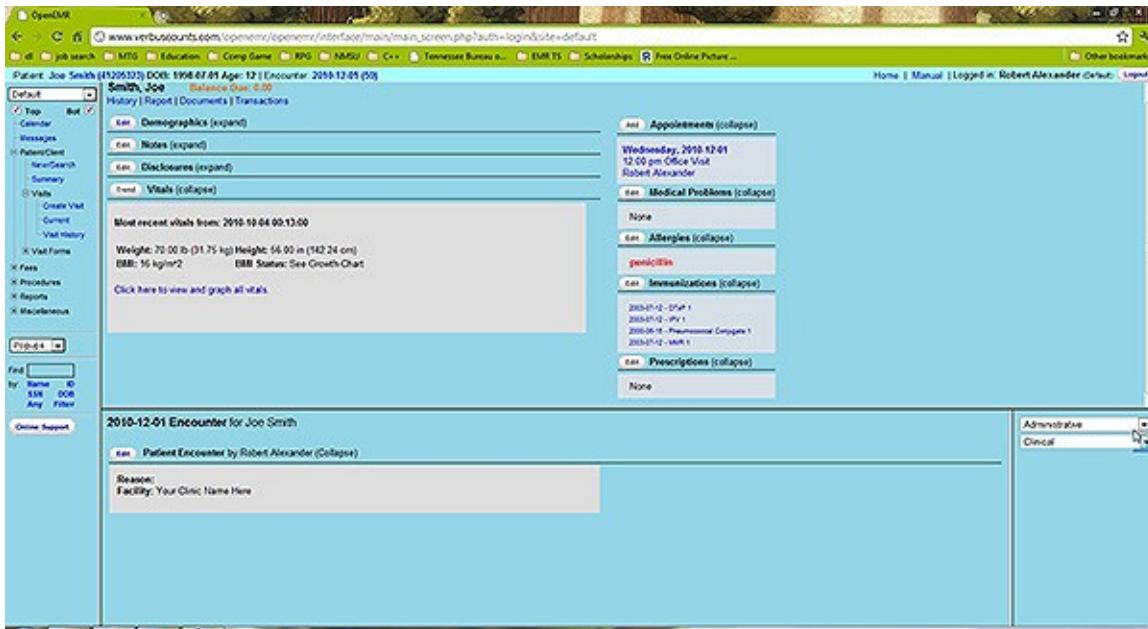
If your clinic's version of OpenEMR is configured differently, you can begin a New Encounter manually by selecting 'Create Visit' from the navigation list on the left. Both methods will bring you to the New Encounter Form.



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

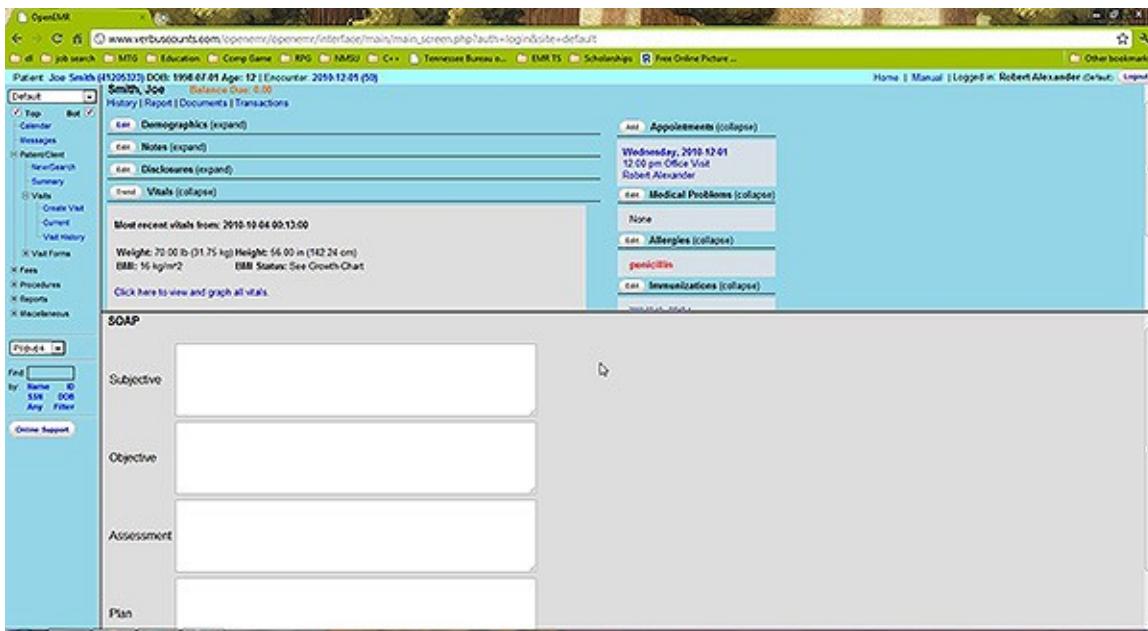
This will bring you back to the summary page for This Encounter. Displayed is a list of all the forms associated with this encounter. You may click 'Edit' next to any of these forms to edit its contents.



To the right is a drop-down list 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.

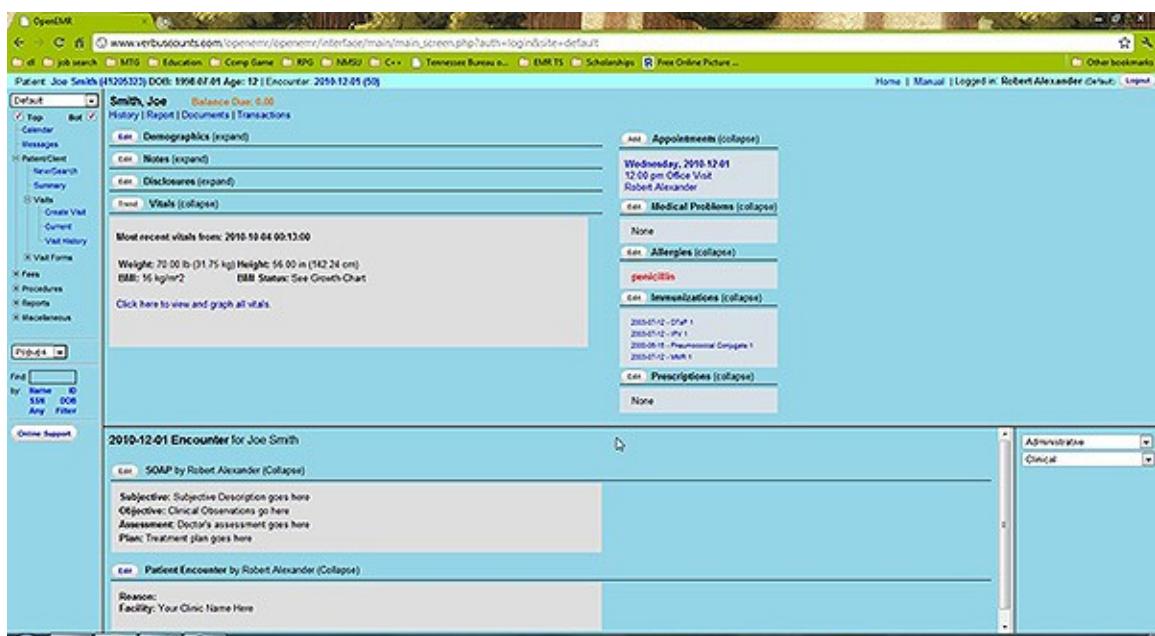
Select 'SOAP' from the drop-down list to add it to the encounter.

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.



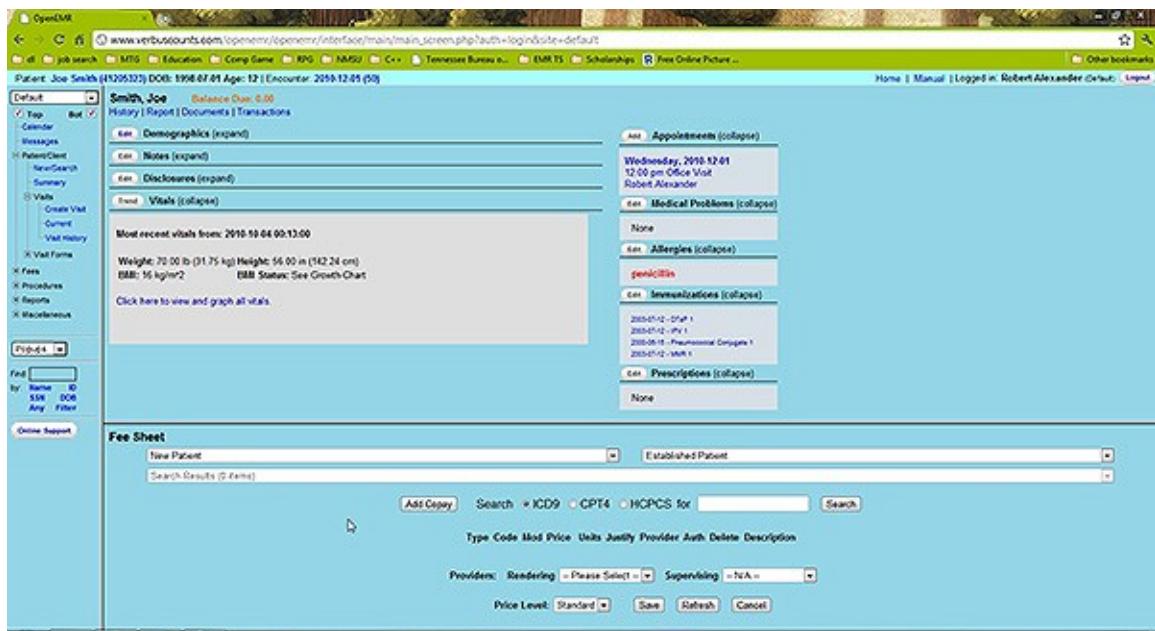
Enter the appropriate information and click 'Save Form' to return to the Encounter summary page.

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.



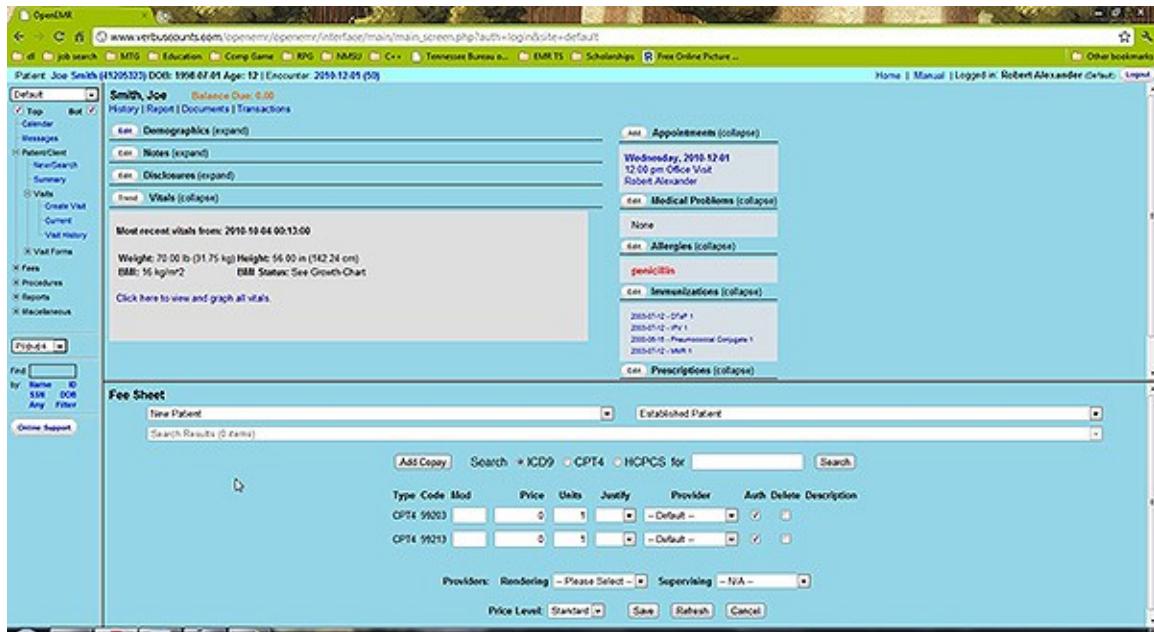
Using the Fee Sheet

Next select the 'Fee Sheet' from the 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.



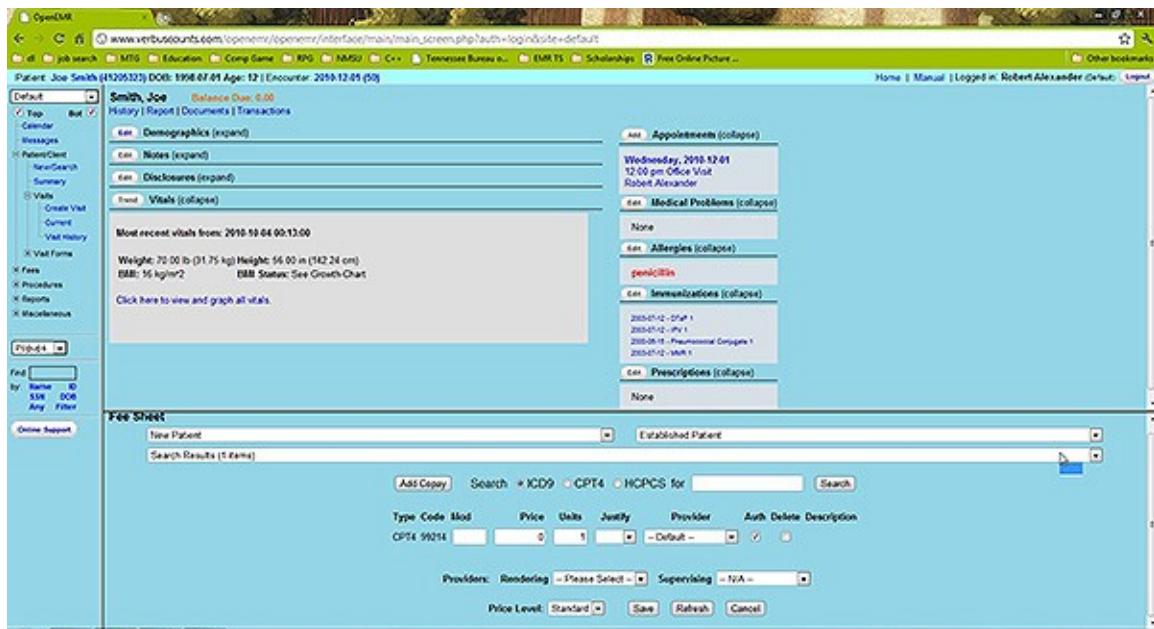
The Fee Sheet includes several drop-down lists of the most commonly used billing codes. It can and should be customized so that it's most suitably adapted to your practice;

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 "New 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'.



A drop-down list 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'.

The screenshot shows the OpenEMR interface for a patient named Smith, Joe. The left sidebar includes a navigation menu with options like Top, Bot, Calendar, Patient/Client, Visits, Visit Forms, Fees, Reports, and Miscellaneous. The main area displays the patient's demographic information, vital signs (Weight: 70.00 lb (31.75 kg), Height: 56.00 in (142.24 cm), BMI: 15.49m²), and a list of recent visits from 2010-09-04 to 2010-09-12. Below this is a 'Fee Sheet' section with fields for CPT4 and ICD9 codes, provider selection, and search functions.

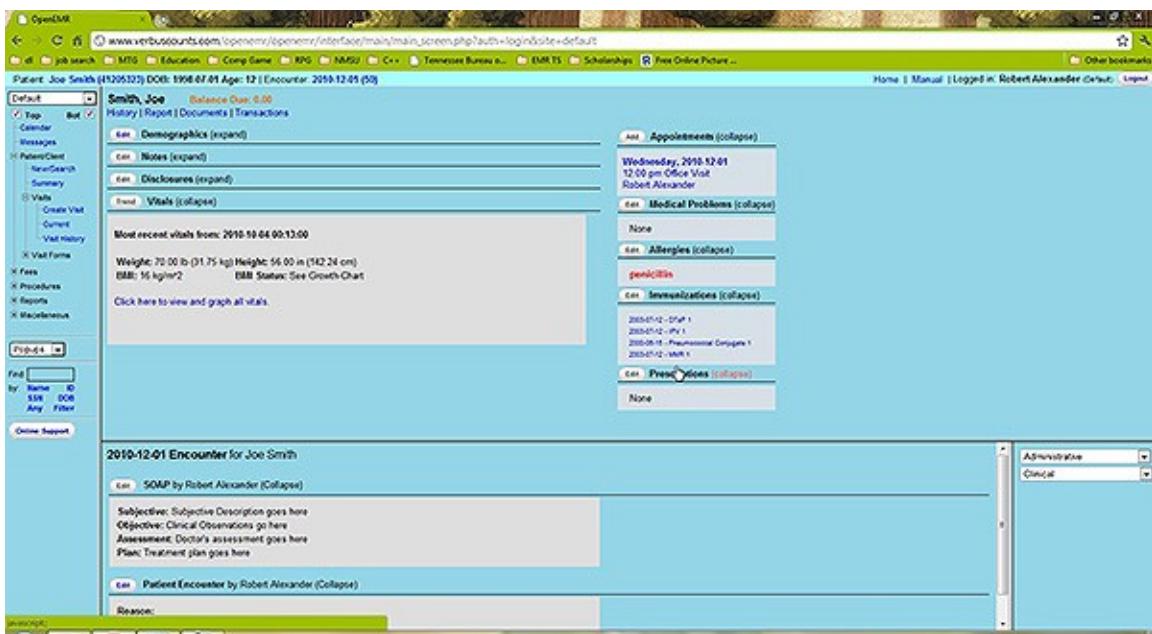
To see the Feet Sheet has been associated with this encounter, click 'Visit History' in the navigation menu to go to the list of encounters for this patient. You can see that the CPT & ICD9 codes are listed next to the new encounter, as well as the SOAP form that was added earlier.

The screenshot shows the Visit History list for patient Rod Roark. The left sidebar shows the navigation menu. The main area lists the encounter for Rod Roark on January 29, 2010, with details including the provider (Betty Black), form type (SOAP), subjective, objective, assessment, and plan sections. Below this is a table titled 'Past Encounters and Documents' showing a previous encounter on 2010-01-29 for cough & chest congestion, provider black, and billing 472.8.

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|---|-------------|----------------|-------------------------|-----------|
| 2010-01-29 | cough & chest congestion SOAP | black | 99203 472.8 | Primary: Pacific Health | |
| 2010-01-29 | Document: insurance_card.jpg (Insurance Card) | | | | |

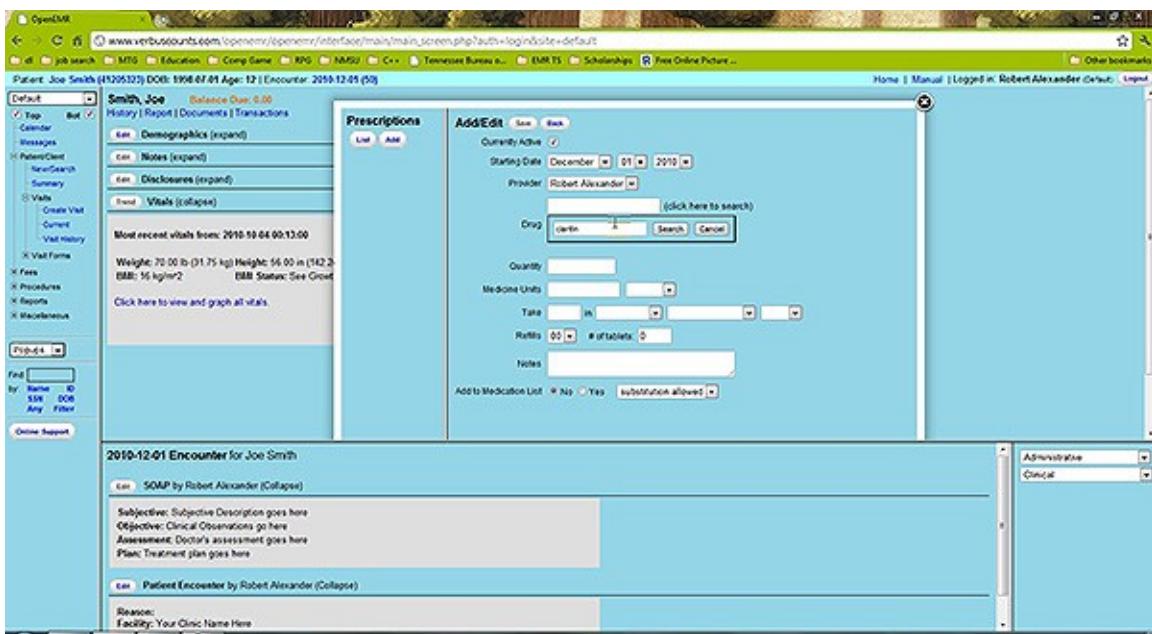
Adding Prescriptions

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 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.

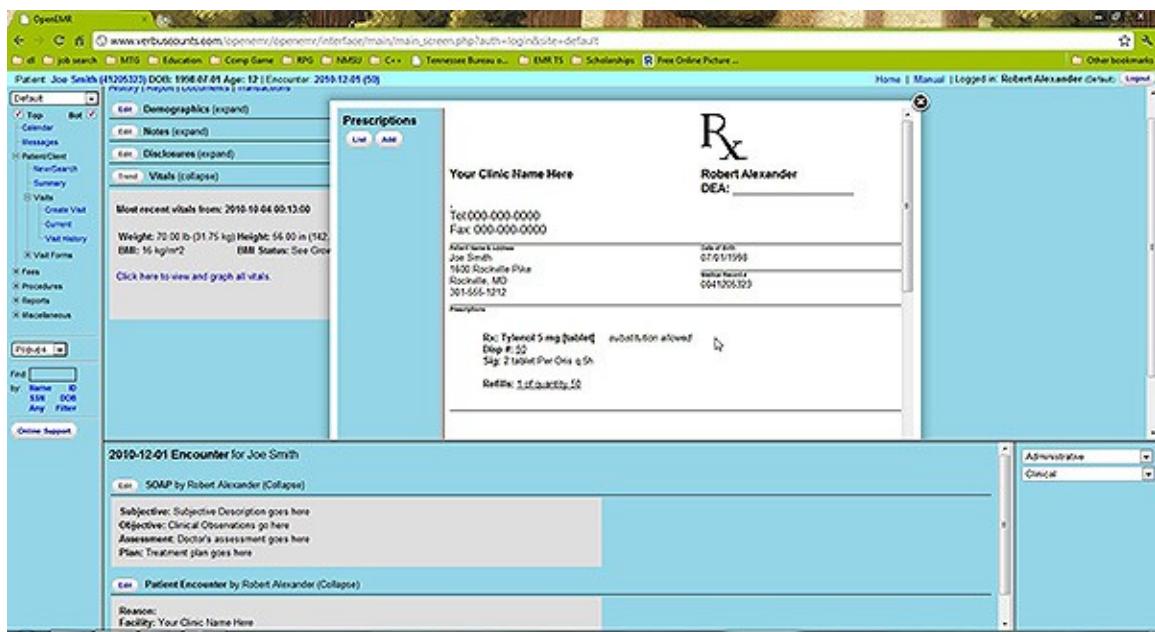


Clicking 'Search' displays a drop-down list of possible medications generated by connecting to the web site www.rxlist.com.

Selecting the desired medication will fill in the Drug field for you. Also, clicking 'Yes' next to "Add to Medication List" will allow the prescription to be included in the Issues list as a Medication.

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. "Auto Send" will use whichever default method was selected when you set up the 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

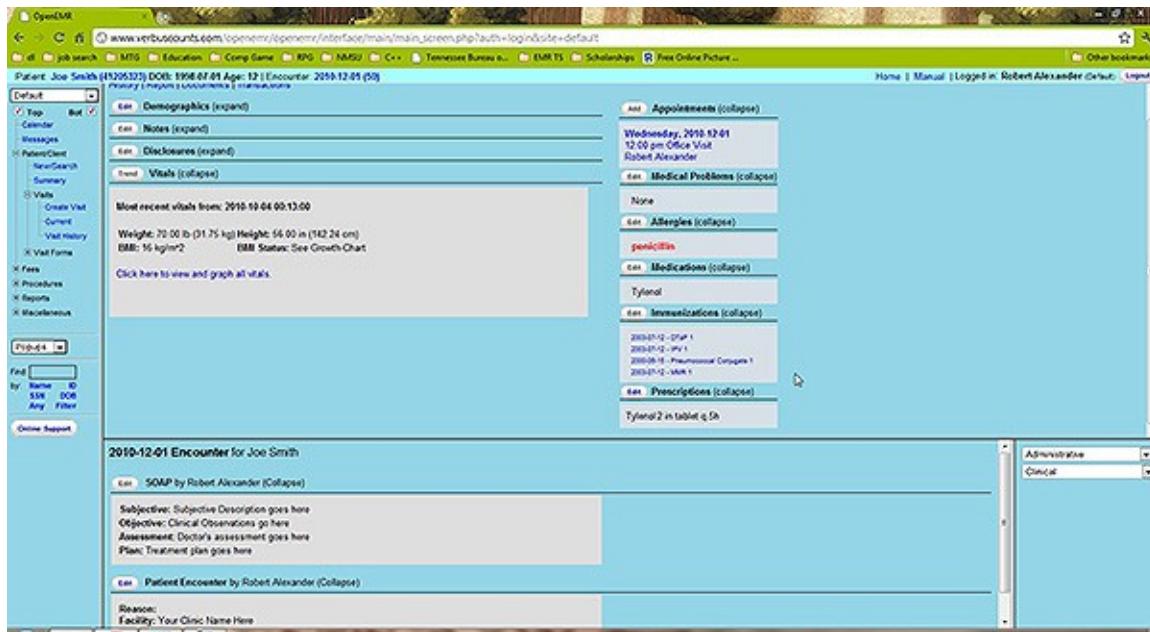
Adding Issues

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.

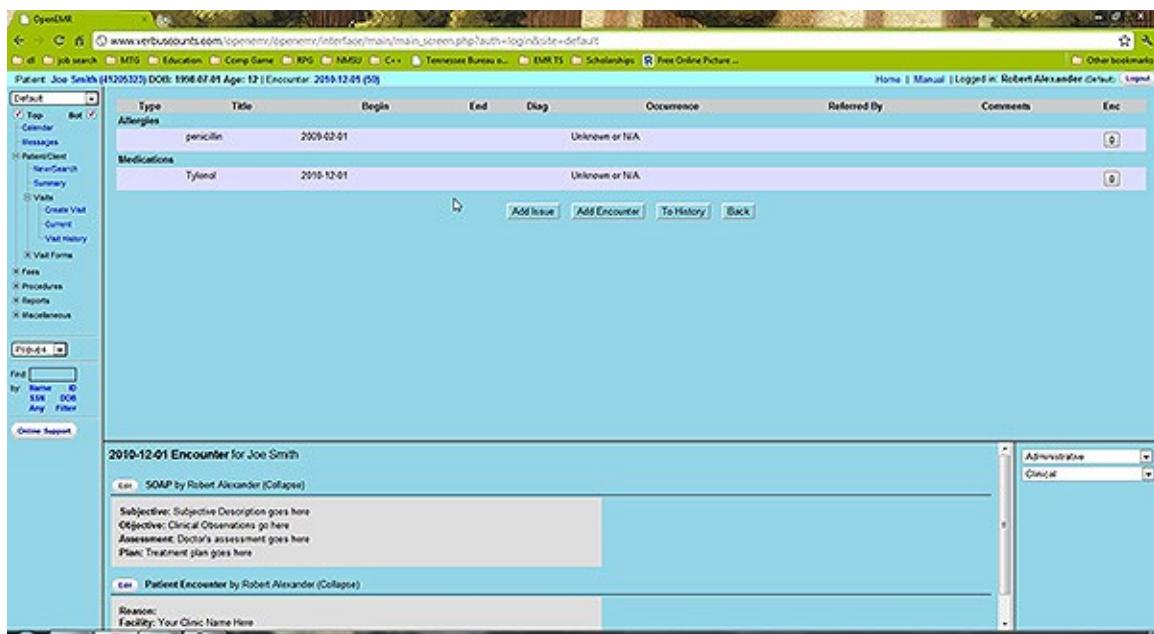
This is especially useful with medical problems, where the user may want to quickly determine which encounters treated a particular problem, or which problems were treated by a particular encounter.



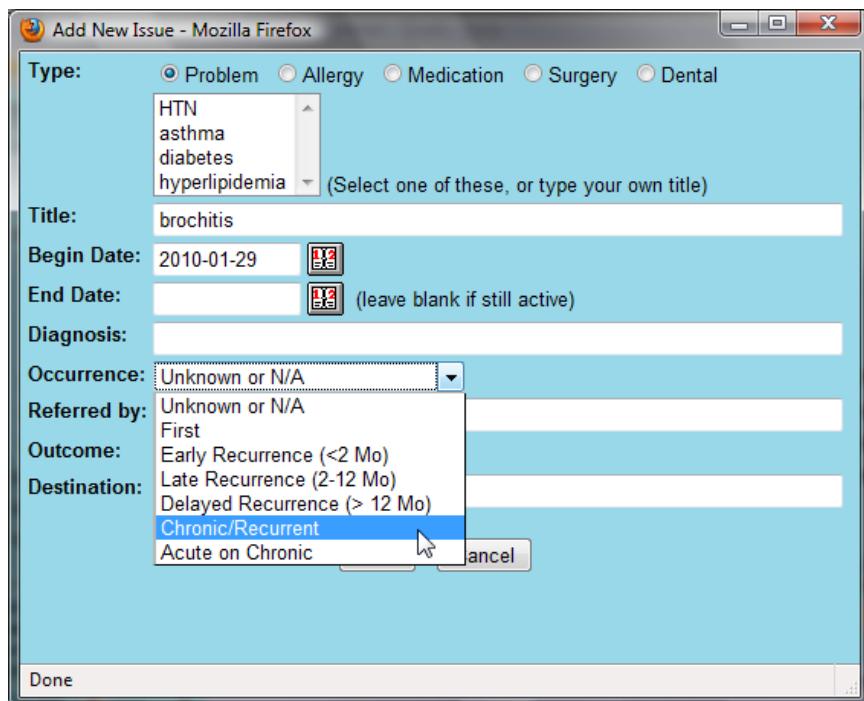
The Issues list can be found on the right-hand side of the Patient Summary page.



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 a complete list of all issues for this patient. Click 'Add Issue' to add a new medical issue you want to keep track of for this patient.



This pops up the 'Add Issue' dialog box.



The default issue type is set to 'Problem'. 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'.

A screenshot of a Firefox dialog box titled "Add New Issue - Mozilla Firefox". The dialog box contains fields for entering a new issue. The "Type:" field has a radio button selected for "Problem". The "Title:" field contains "brochitis". The "Begin Date:" field shows "2010-01-29" with a calendar icon to its right. The "End Date:" field has a calendar icon and the note "(leave blank if still active)". The "Diagnosis:" field contains "ICD9:472.8". The "Occurrence:" dropdown menu is set to "Chronic/Recurrent". The "Referred by:" and "Outcome:" fields are empty. The "Destination:" field is also empty. At the bottom of the dialog are "Save" and "Cancel" buttons, with the "Save" button being the one currently highlighted by a cursor. A "Done" button is located at the very bottom.

Additional issues are entered in the same manner; clicking 'Add Issue' and selecting the appropriate type, such as 'Allergy'. Notice that the 'Add New Issue' dialog also uses the OpenEMR date selection tool described earlier.

Add New Issue - Mozilla Firefox

| | |
|---|--|
| Type: | <input type="radio"/> Problem <input checked="" type="radio"/> Allergy <input type="radio"/> Medication <input type="radio"/> Surgery <input type="radio"/> Dental |
| penicillin | |
| (Select one of these, or type your own title) | |
| Title: | penicillin |
| Begin Date: | 2009-01-01 |
| End Date: | |
| Diagnosis: | |
| Occurrence: | Unknown or N/A |
| Referred by: | |
| Outcome: | Unassigned |
| Destination: | |

January, 2009

| wk | Sun | Mon | Tue | Wed | Thu | Fri | Sat | |
|----|------------|-----|-----|-----|-----|-----|-----|----|
| 52 | 1 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 1 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | |
| 2 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | |
| 3 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | |
| 4 | Thu, Jan 1 | | | | | | | |

Done

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.

OpenEMR

Patient: Joe Smith (1129523) DOB: 1998-07-01 Age: 12 | Encounter: 2010-12-01 (50)

| Type | Title | Begin | End | Diag | Occurrence | Referred By | Comments | Enc |
|------------------|------------|------------|-----|----------------------|----------------|-------------|----------|----------------------|
| Allergies | penicillin | 2009-02-01 | | | Unknown or N/A | | | Edit |
| Medical Problems | bronchitis | 2010-12-01 | | KID9.3 (Blood Check) | Unknown or N/A | | | Edit |
| Medications | Tylenol | 2010-12-01 | | | Unknown or N/A | | | Edit |

Add Issue Add Encounter To History Back

2010-12-01 Encounter for Joe Smith

SOAP by Robert Alexander (Collapsed)

Subjective: Subjective Description goes here
Objective: Clinical Observations go here
Assessment: Doctor's assessment goes here
Plan: Treatment plan goes here

Patient Encounter by Robert Alexander (Collapsed)

Reason:
Facility: Your Clinic Name Here

Administrative Clinical

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.

Issues and Encounters - Mozilla Firefox

Issues and Encounters for Rod Roark (1)

| | | | | |
|---|------------|-------------|--|--------------------------|
| <input checked="" type="radio"/> Issues Section | | | <input type="radio"/> Encounters Section | |
| Type | Title | Description | Date | Presenting Complaint |
| Allergy | penicillin | | 2010-01-29 | cough & chest congestion |
| Problem | brochitis | | | |
| Medication | Claritin D | | | |

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.

Done

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.

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

Issues and Encounters for Rod Roark (1)

| | | | | |
|---|------------|-------------|--|--------------------------|
| <input checked="" type="radio"/> Issues Section | | | <input type="radio"/> Encounters Section | |
| Type | Title | Description | Date | Presenting Complaint |
| Allergy | penicillin | | 2010-01-29 | cough & chest congestion |
| Problem | brochitis | | | |
| Medication | Claritin D | | | |

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.

Done

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

Demographics (More)

Who

- Name: Mr. Rod Roark
- DOB: 1985-08-06
- S.S.: 111-22-3333
- External ID: 1
- Sex: Male
- License/ID: 1234567

Contact

- Address: 321 SW Capitol Hwy
- City: Portland
- State: Oregon
- Postal Code: 97219
- Country: USA
- Emergency Contact: Wife
- Home Phone: 503-456-7890
- Mobile Phone: 971-564-7896
- Emergency Phone: 971-222-3333
- Work Phone: 503-112-3334
- Contact Email: mr.rod@gmail.com
- Provider: Betty Black
- Pharmacy: Comer Pharmacy 503-987-6543 / 500 W Burnside / Portland

Choices

| Type | Title | Begin | End | Diag | Occurrence | Referred By | Comments | Enc |
|------------------|------------|------------|-----|--|-------------------|-------------|----------|-----|
| Allergies | penicillin | 2009-01-01 | | | Unknown or N/A | | | 0 |
| Medical Problems | bronchitis | 2010-01-29 | | ICD9-472.8 (Allergic rhinitis, other allergen) | Chronic/Recurrent | | | 1 |
| Medications | Claritin D | 2010-01-29 | | | Unknown or N/A | | | 0 |

Buttons: Add Issue, Add Encounter, To History, Back

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.

Immunizations

Vaccine: Influenza 1

Date Administered: 2010-12-02

Immunization Manufacturer: [empty]

Immunization Lot Number: [empty]

Name and Title of Immunization Administrator: Central Medical [or choose] Administrator

Date Immunization Information Statements Given: 2010-12-02

Date of VIS Statement: 2010-12-02

Notes: [empty]

Buttons: Save Immunization, Print Record (PDF), Print Record (HTML), Clear

| Vaccine | Date | Manufacturer | Lot Number | Administered By | Education | Date | Note |
|--------------------------|------------|-------------------|------------|-----------------|-----------|------|------|
| DTP 1 | 2003-07-12 | Alexander, Robert | 2003-07-12 | | | | |
| IPV 1 | 2003-07-12 | Alexander, Robert | 2003-07-12 | | | | |
| Pneumococcal Conjugate 1 | 2000-06-15 | Alexander, Robert | 2000-06-15 | | | | |

Past Encounters and Documents

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|----------------------------------|-------------|---------------|---------|------------|
| 2010-12-01 | SOP | | Administrator | 95214 | 2010-12-01 |
| 2009-02-01 | Vitals | | Administrator | 3 | 2009-02-01 |
| 2008-04-02 | Vitals | | Administrator | | 2008-04-02 |
| 2007-01-01 | Vitals | | Administrator | | 2007-01-01 |
| 2003-07-12 | DTP, MMR, IPV immunization given | Vitals | Administrator | | 2003-07-12 |
| 2000-06-15 | PCV Immunization | | Administrator | | 2000-06-15 |

Select the type of immunization from the drop-down list provided, and 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.

Patient: Joe Smith (4129532) DOB: 1998-07-01 Age: 12

| | |
|------------------|--|
| Default | Date Administered: 2010-12-02 |
| Top Bottom | Immunization Manufacturer: |
| Calendar | Immunization Lot Number: |
| Messages | Name and Title of Immunization Administrator: or choose: Administrator. |
| Patient Client | Date Immunization Information Statements Given: 2010-12-02 |
| New Search | Date of VIS Statement (?): 2010-12-02 |
| Summary | Notes: |
| X Visit | <input type="button" value="Save Immunization"/> <input type="button" value="Print Record (PDF)"/> <input type="button" value="Print Record (HTML)"/> <input type="button" value="Clear"/> |
| Create Visit | Vaccine v Date Manufacturer Lot Number Administered By Education Date Note |
| Contact | DTP 1 2003-07-12 Alexander, Robert 2003-07-12 <input type="button" value="Delete"/> |
| Visit History | IPV 1 2003-07-12 Alexander, Robert 2003-07-12 <input type="button" value="Delete"/> |
| X Visit Forms | Pneumococcal Conjugate 1 2000-06-15 Alexander, Robert 2000-06-15 <input type="button" value="Delete"/> |
| X Fees | MMR 1 2003-07-12 Alexander, Robert 2003-07-12 <input type="button" value="Delete"/> |
| X Procedures | Influenza 1 2010-12-02 Administrator, 2010-12-02 <input type="button" value="Delete"/> |
| X Administration | |
| X Reports | |
| X Miscellaneous | |

Find by Name ID SSN DOB Any Filter

Online Support

Past Encounters and Documents (Pending View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|--|---------------|------------|------------|
| 2010-12-01 | | SOAP | | 95214 3 | 2010-12-01 |
| 2009-02-01 | | Vitals | Administrator | | 2009-02-01 |
| 2008-04-02 | | Vitals | Administrator | | 2008-04-02 |
| 2007-01-01 | | Vitals | Administrator | | 2007-01-01 |
| 2003-07-12 | | DTP, MMR, IPV immunization given Vitals | Administrator | | 2003-07-12 |
| 2000-06-15 | | PCV Immunization | Administrator | | 2000-06-15 |

Return to the Summary page via the navigation menu on the left. Notice that the lower left portion of the patient summary now shows an updated list of all active issues, immunizations and prescriptions.

Patient: Joe Smith (4129532) DOB: 1998-07-01 Age: 12

| | |
|------------------|---|
| Default | Smith, Joe <input type="button" value="Delete"/> Balance Due: \$0.00 |
| Top Bottom | <input type="button" value="History"/> <input type="button" value="Report"/> <input type="button" value="Documents"/> <input type="button" value="Transactions"/> |
| Calendar | <input type="button" value="New Search"/> <input type="button" value="Summary"/> |
| Messages | <input type="button" value="X Visit"/> <input type="button" value="Create Visit"/> <input type="button" value="Contact"/> <input type="button" value="Visit History"/> <input type="button" value="X Visit Forms"/> <input type="button" value="X Fees"/> <input type="button" value="X Procedures"/> <input type="button" value="X Administration"/> <input type="button" value="X Reports"/> <input type="button" value="X Miscellaneous"/> |
| Patient Client | <input type="button" value="Who"/> <input type="button" value="Contact"/> <input type="button" value="Choices"/> <input type="button" value="Employer"/> <input type="button" value="Stats"/> |
| New Search | <input type="button" value="Demographics (collapse)"/> |
| Summary | <input type="button" value="None"/> <input type="button" value="Medical Problems (collapse)"/> <input type="button" value="None"/> <input type="button" value="Allergies (expand)"/> <input type="button" value="None"/> <input type="button" value="Medications (collapse)"/> <input type="button" value="Tylenol"/> <input type="button" value="None"/> <input type="button" value="Immunizations (collapse)"/> |
| X Visit | <input type="button" value="Notes (expand)"/> |
| Create Visit | <input type="button" value="Disclosures (expand)"/> |
| Contact | <input type="button" value="Vitals (expand)"/> |
| Visit History | <input type="button" value="Prescriptions (collapse)"/> |
| X Visit Forms | Tylenol 2 in tablet q 5h |
| X Fees | |
| X Procedures | |
| X Administration | |
| X Reports | |
| X Miscellaneous | |

Find by Name ID SSN DOB Any Filter

Online Support

Past Encounters and Documents (Pending View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|--|---------------|------------|------------|
| 2010-12-01 | | SOAP | | 95214 3 | 2010-12-01 |
| 2009-02-01 | | Vitals | Administrator | | 2009-02-01 |
| 2008-04-02 | | Vitals | Administrator | | 2008-04-02 |
| 2007-01-01 | | Vitals | Administrator | | 2007-01-01 |
| 2003-07-12 | | DTP, MMR, IPV immunization given Vitals | Administrator | | 2003-07-12 |
| 2000-06-15 | | PCV Immunization | Administrator | | 2000-06-15 |

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 use the search function in the lower left-hand corner to locate the patient for which you would like to add a note.

Patient: Joe Smith (4120532) DOB: 1998-07-01 Age: 12

| Name | Phone | SS | DOB | ID | PID | (Number Of Encounters) | (Days Since Last Encountered) | (#0 Days From Last Encountered) |
|-----------------|--------------|------------|----------|--------|-----|------------------------|-------------------------------|---------------------------------|
| Smith, Joe | 315-555-1234 | 87231967 | 4120532 | 2 | 0 | - | - | - |
| Smith, Joe | 301-555-1232 | 87051906 | 4120532 | 8 | 0 | - | - | - |
| Smith, Mary | | 41100-0001 | 87051906 | 113402 | 14 | 0 | - | - |
| Smith, Theodore | 248-555-1232 | 11561931 | 87066222 | 9 | 0 | - | - | - |

Past Encounters and Documents (Pending View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|-----------------------------------|---------------|---------|------------|
| 2010-12-01 | | SOAP | Administrator | 95214 | 2010-12-01 |
| 2009-02-01 | | Vitals | Administrator | 3 | 2009-02-01 |
| 2009-04-02 | | Vitals | Administrator | | 2009-04-02 |
| 2007-01-01 | | Vitals | Administrator | | 2007-01-01 |
| 2003-01-12 | | DTaP, MMR, RSV immunization given | Administrator | | 2003-01-12 |
| 2000-06-15 | | Vitals | Administrator | | 2000-06-15 |
| | | PCV Immunization | Administrator | | 2000-06-15 |

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

Patient: Joe Smith (4120532) DOB: 1998-07-01 Age: 12

Demographics (collapse)

| | | | | |
|---------------------|----------------------|-------------|----------|-------|
| Who | Contact | Choices | Employer | Stats |
| Name: Mr. Joe Smith | External ID: 4120532 | Sex: Male | | |
| DOB: 1998-07-01 | | S.S.: | | |
| S.S.: | | License/ID: | | |
| Marital Status: | User Defined. | | | |

Notes (expand)

Disclosures (expand)

Vitals (expand)

Appointments (collapse)

Medical Problems (collapse)

Allergies (expand)

Medications (collapse)

Tylenol

Immunizations (collapse)

2010-12-01 - DTaP 1
2010-01-01 - IV 1
2009-01-15 - Pneumococcal Conjugate 1
2009-01-12 - Vicks 1
2010-12-02 - Influenza 1

Prescriptions (collapse)

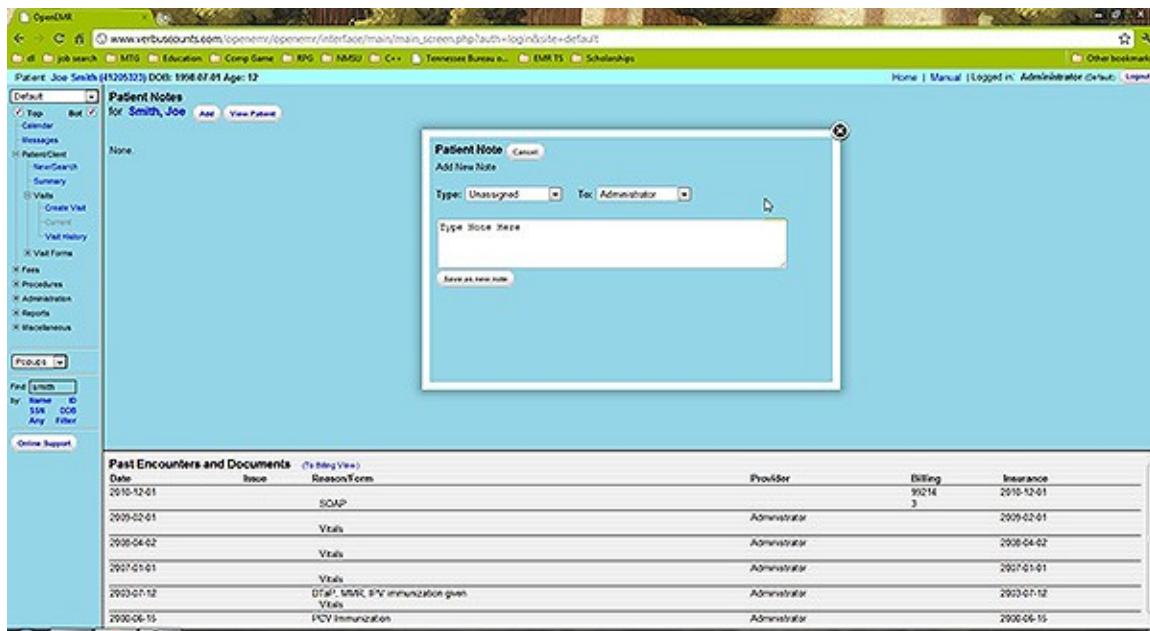
Tylenol 2 in tablet q 5h

Past Encounters and Documents (Pending View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|-----------------------------------|---------------|---------|------------|
| 2010-12-01 | | SOAP | Administrator | 95214 | 2010-12-01 |
| 2009-02-01 | | Vitals | Administrator | 3 | 2009-02-01 |
| 2009-04-02 | | Vitals | Administrator | | 2009-04-02 |
| 2007-01-01 | | Vitals | Administrator | | 2007-01-01 |
| 2003-01-12 | | DTaP, MMR, RSV immunization given | Administrator | | 2003-01-12 |
| | | Vitals | Administrator | | 2000-06-15 |

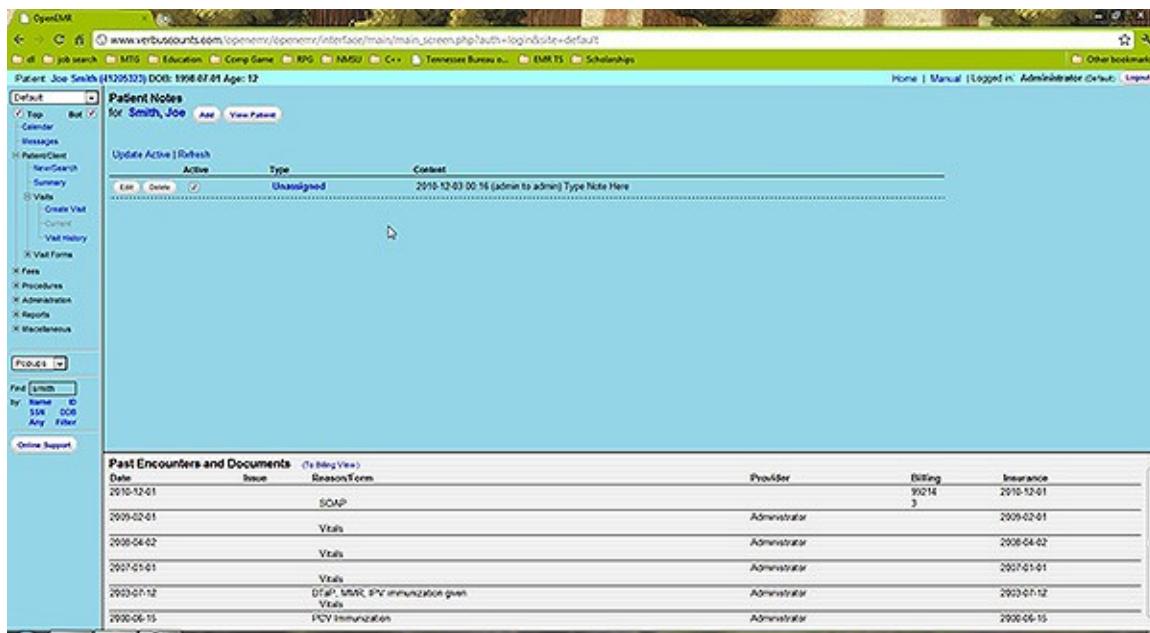
If the user is not Authorized they will be unable to see the patient's medical details such as issues, immunizations and prescriptions.

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'.



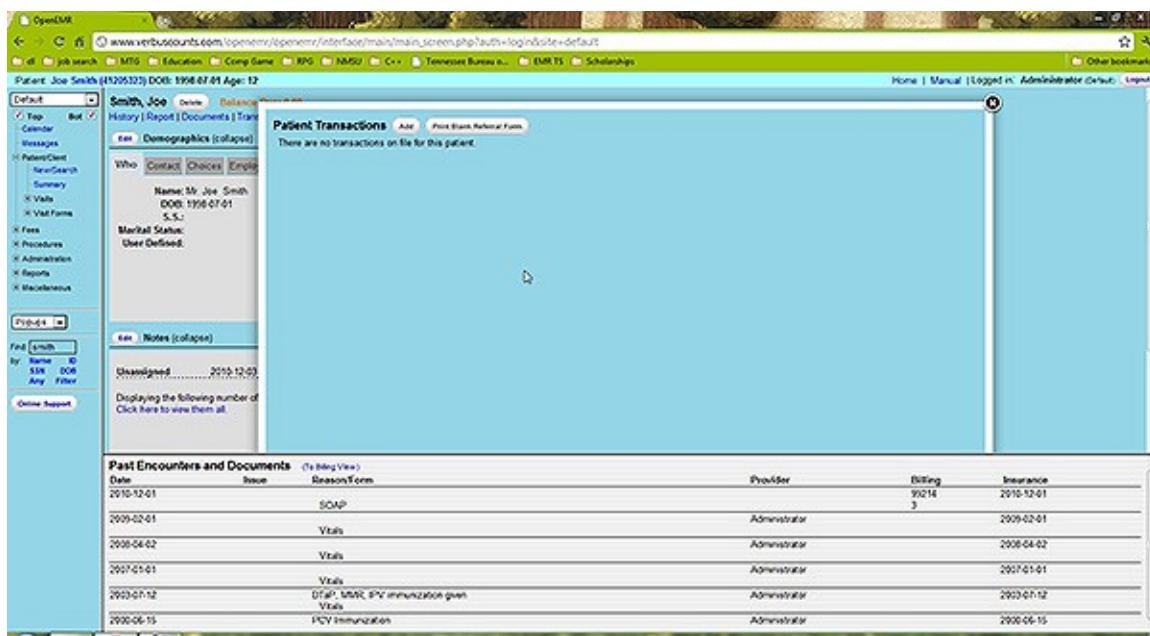
The new note now appears in the list on the Patient Notes page. The checkbox is used to control whether the note is "active". Above are options to view only the active or inactive notes.

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

The new note is now listed on the Summary page.

Transactions

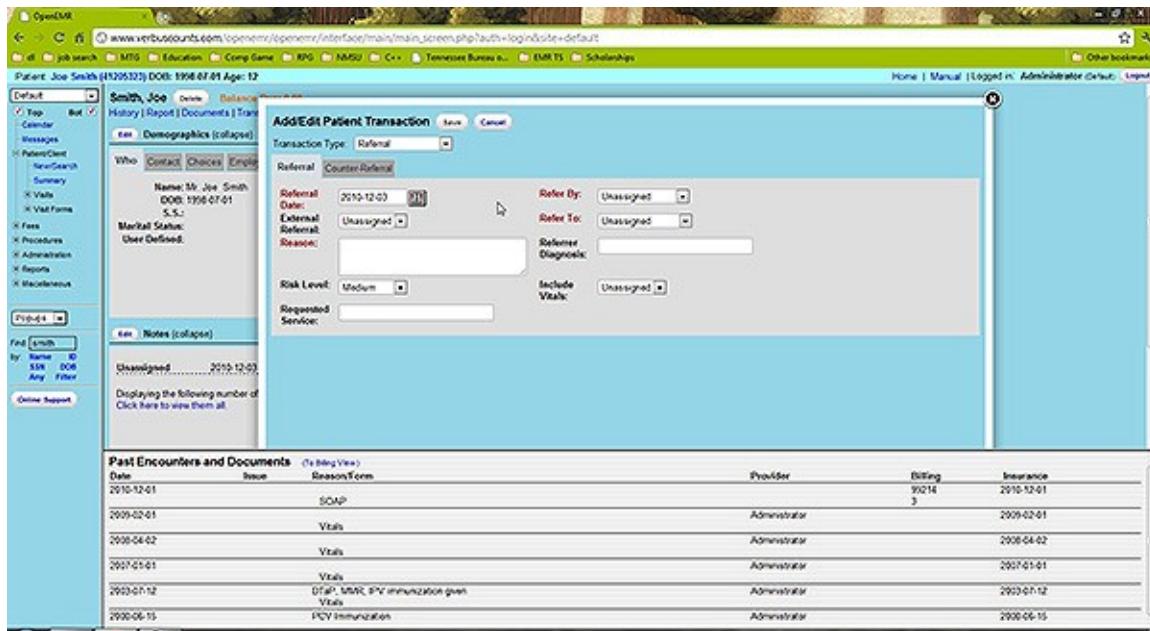
Select 'Transactions' at the top of the Patient Summary to go to the Transactions page.



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.



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

Patient: Joe Smith (1129532) DOB: 1998-07-01 Age: 12

Add/Edit Patient Transaction

Transaction Type: Referral

Referral:

| | |
|-------------------------------|-----------------------------|
| Referral Date: 2010-12-03 | Referrer By: Administrator |
| External Referral: Unassigned | Referee To: Heart, Asst. |
| Reason: Chest pain | Referral Diagnosis: |
| Risk Level: Medium | Included Vitals: Unassigned |
| Requested Service: | |

Past Encounters and Documents (Pending View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|---|---------------|------------|------------|
| 2010-12-01 | | SOAP | Administrator | 95014 3 | 2010-12-01 |
| 2009-02-01 | | Vitals | Administrator | | 2009-02-01 |
| 2008-04-02 | | Vitals | Administrator | | 2008-04-02 |
| 2007-01-01 | | Vitals | Administrator | | 2007-01-01 |
| 2003-01-12 | | DTaP, MMR, IPV immunization given Vitals | Administrator | | 2003-01-12 |
| 2000-06-15 | | PCV Immunization | Administrator | | 2000-06-15 |

Click 'Save'.

The referral is now in the Patient Transactions list.

Patient: Joe Smith (1129532) DOB: 1998-07-01 Age: 12

Patient Transactions

| Type | Date | User | Details |
|----------|--------------------------|------|------------|
| Referral | Fri December 3rd (admin) | | Chest pain |

Past Encounters and Documents (Pending View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|---|---------------|------------|------------|
| 2010-12-01 | | SOAP | Administrator | 95014 3 | 2010-12-01 |
| 2009-02-01 | | Vitals | Administrator | | 2009-02-01 |
| 2008-04-02 | | Vitals | Administrator | | 2008-04-02 |
| 2007-01-01 | | Vitals | Administrator | | 2007-01-01 |
| 2003-01-12 | | DTaP, MMR, IPV immunization given Vitals | Administrator | | 2003-01-12 |
| 2000-06-15 | | PCV Immunization | Administrator | | 2000-06-15 |

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 screenshot shows the OpenEMR interface for a patient named Joe Smith. On the left, a sidebar lists various medical records such as History, Report, Documents, and Transaction. The main area displays two identical 'REFERRAL FORM' templates. Each form includes fields for Name, Age, Gender, Address, Postal, Phone, Reference Reason, Diagnosis, Reference Classification, Doctor's name and signature, and Referrer information. Below the forms, a table titled 'Past Encounters and Documents' lists transactions from 2010-12-01 to 2009-06-15, including entries for SOAP, Vitals, and immunizations.

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

Basic Transactions

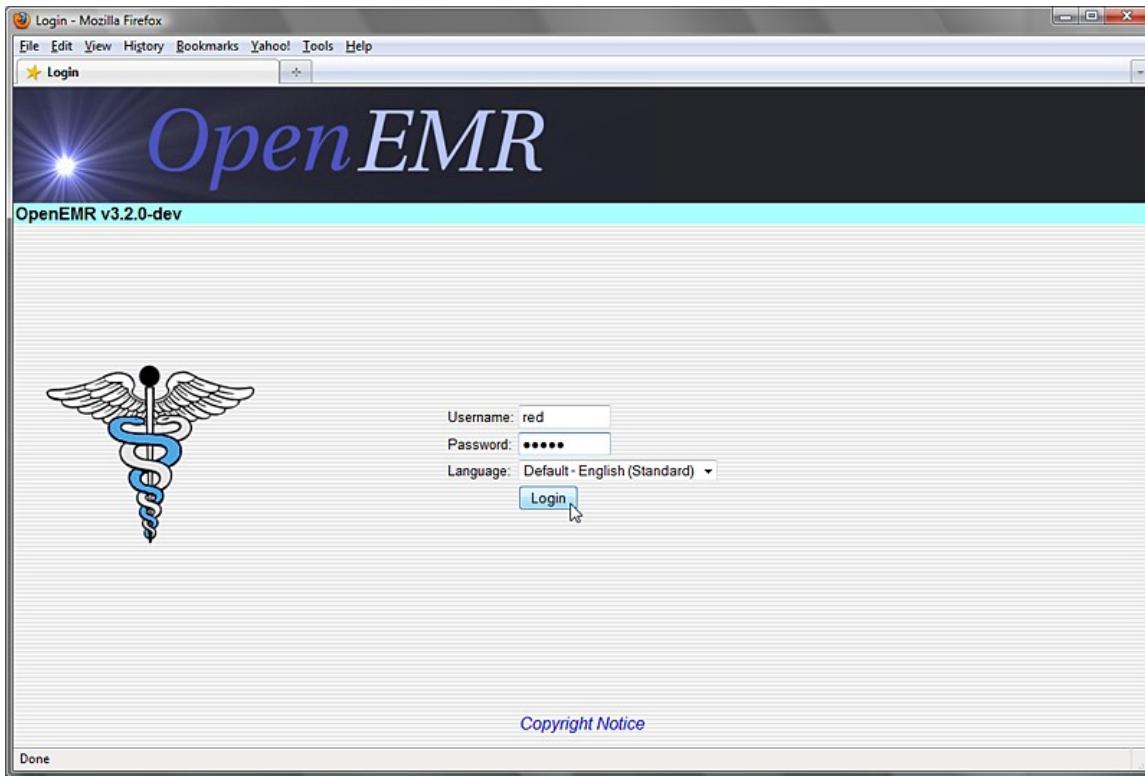
Other transaction types use the simple transaction form. Select the desired type from the list and enter the transaction details in the text box provided. Click 'Save' when finished.

This screenshot shows the 'Add/Edit Patient Transaction' dialog box overlaid on the main OpenEMR interface. The dialog box has a 'Transaction Type' dropdown set to 'Physician Request'. A large text area labeled 'Details' contains the placeholder text 'Type details here.' The background shows the same patient profile and transaction history as the previous screenshot.

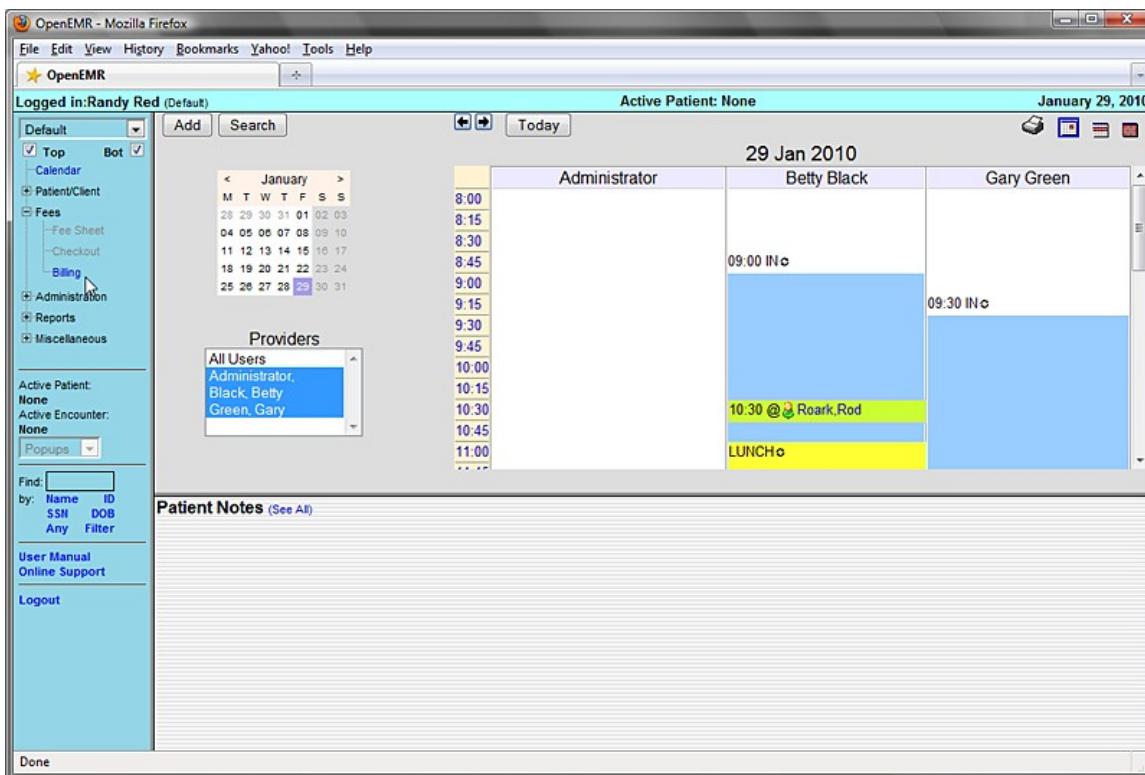
The new transaction has now been added to the list along with the referral. Click 'Edit' next to a transaction to edit its contents.

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.



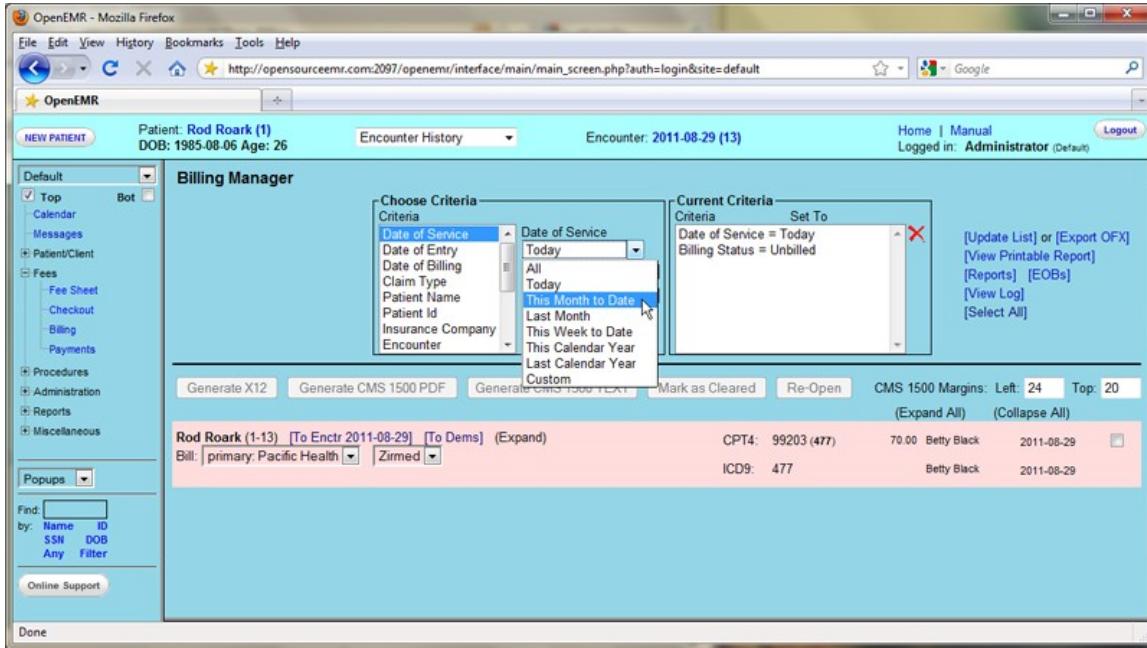
Select 'Fees - Billing' from the navigation menu on the left. This brings you to the main Billing screen. This

will present you with options to generate a variety of printable and electronic claims and reports.

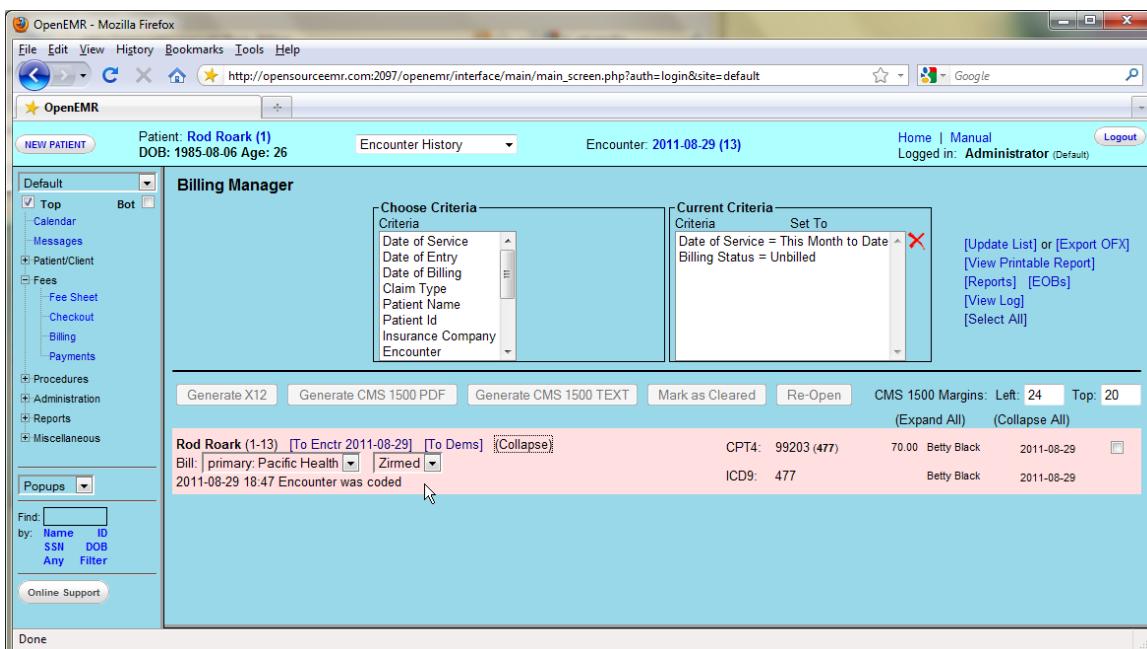
Billing Reports

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.

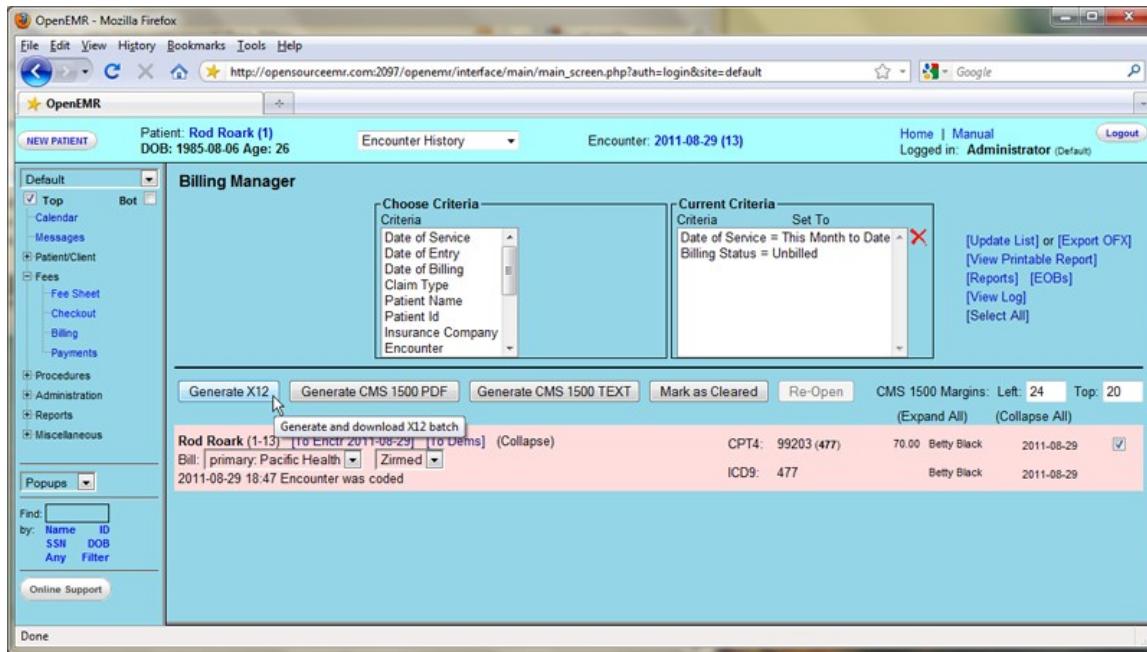


The list should now display all billables from the selected date range.



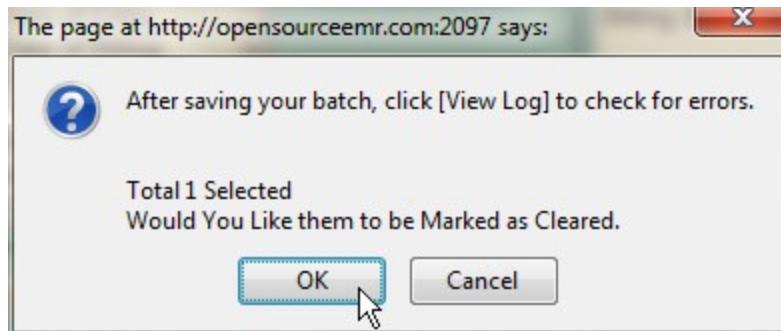
Generating Claims

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.



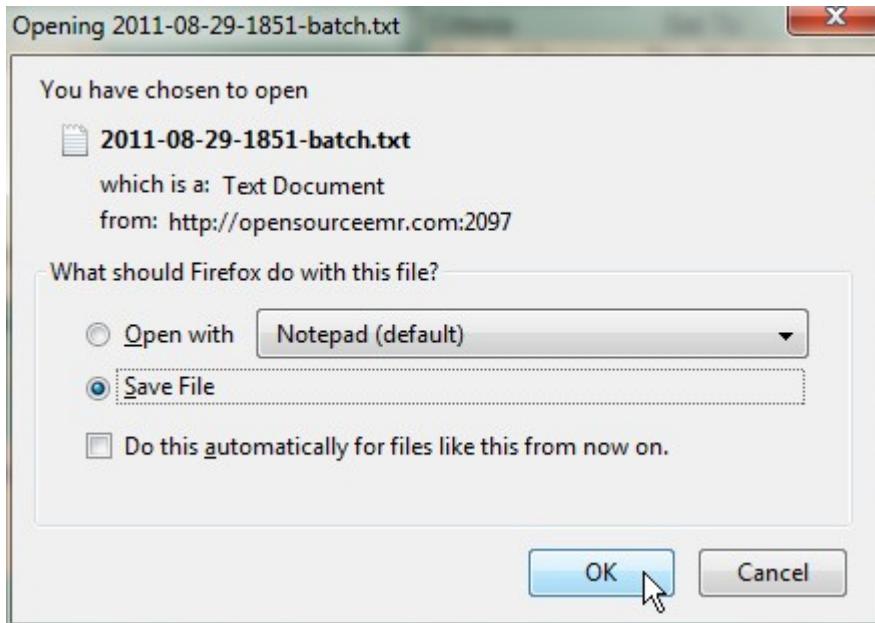
Click 'Generate X12' to create a claim file that is suitable for sending to the clearinghouse.

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.

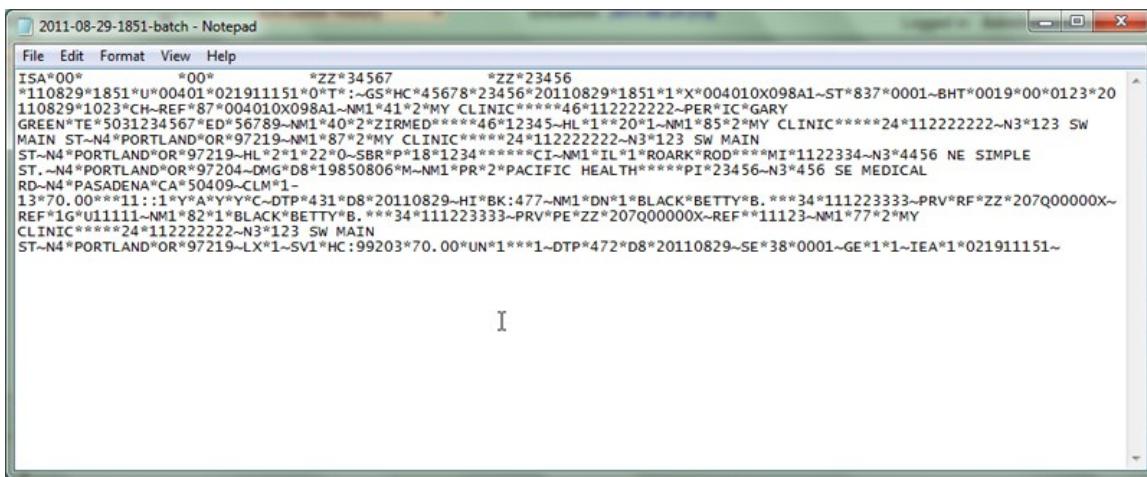
The standard Save File dialog should appear next, allowing you to save the generated batch file to your computer.



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.

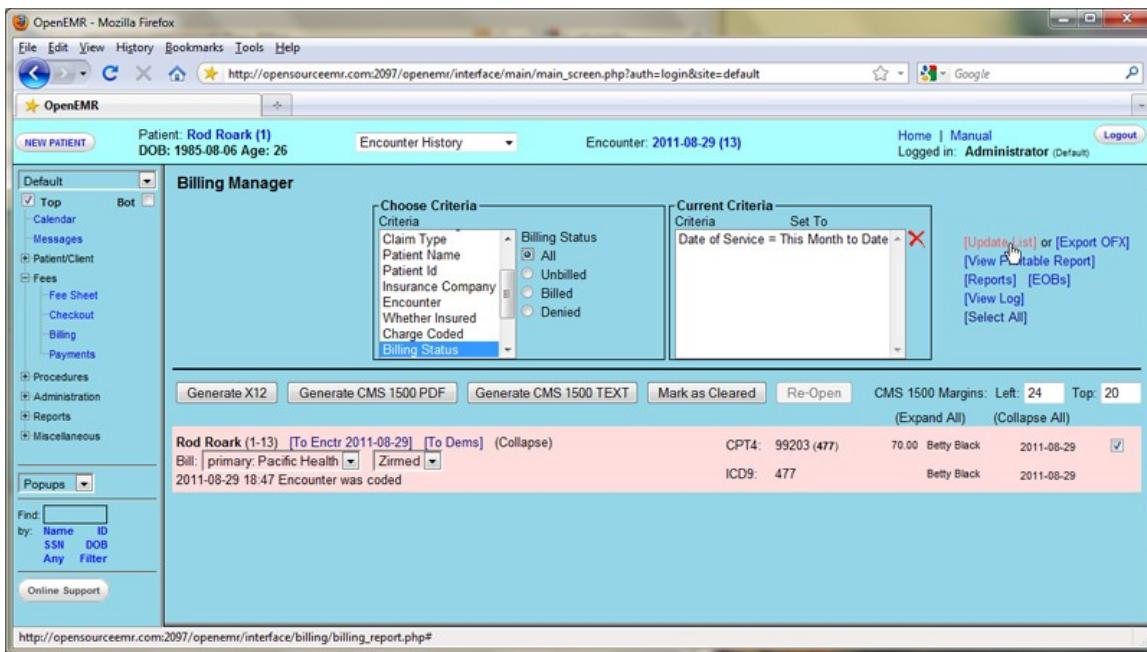


```

2011-08-29-1851-batch - Notepad
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*112222222~PER*IC*GARY
GREEN*TE*5031234567*ED*56789~NM1*40*2*ZIRMED***~*46*12345~HL*1**20*1~NM1*85*2*MY CLINIC***~*24*112222222~N3*123 SW
MAIN ST~N4*PORTLAND*OR*97219~HL*2*1*22*0~SBR*p*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~*70.00***~11::1*Y*Y*Y*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*11123~NM1*77*2*MY
CLINIC***~*24*112222222~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*1~IEA*1*021911151~

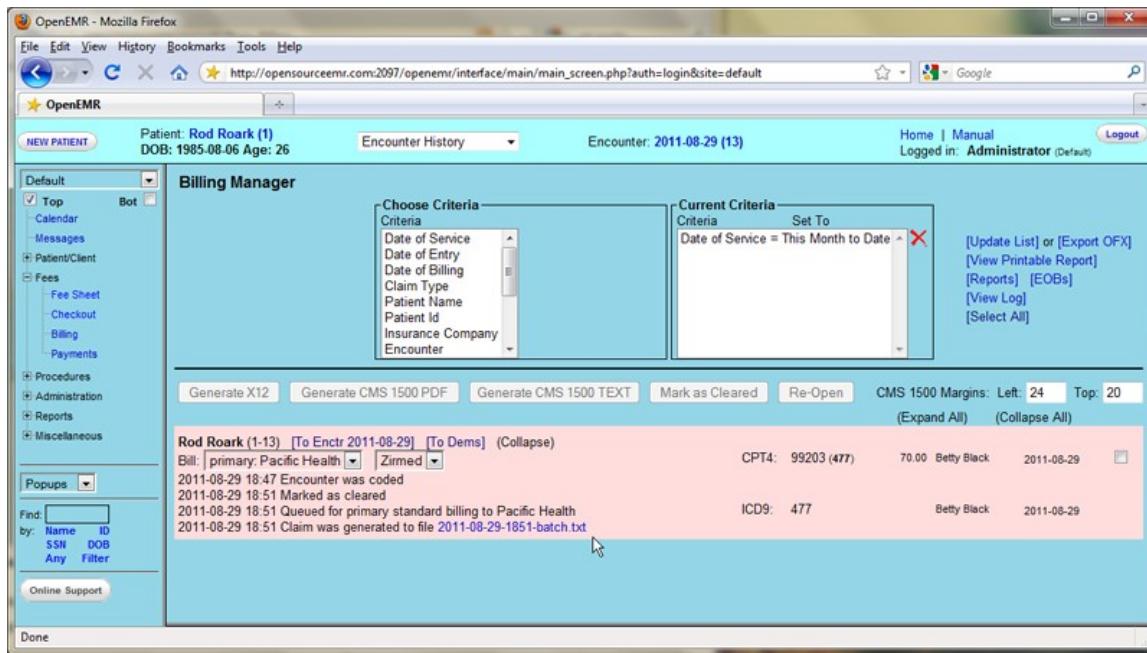
```

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.



The screenshot shows the OpenEMR Billing Manager interface. On the left, there's a sidebar with various links like 'Patient', 'Fee Sheet', 'Billing', etc. The main area is titled 'Billing Manager' and contains two panels: 'Choose Criteria' and 'Current Criteria'. In 'Choose Criteria', under 'Billing Status', the 'Unbilled' option is selected. In 'Current Criteria', the 'Billing Status' dropdown is set to 'Unbilled' and the 'Set To' dropdown is set to 'Date of Service = This Month to Date'. There's a red 'X' button next to the 'Set To' dropdown. Below these panels, there's a summary table for 'Rod Roark (1-13)' with columns for CPT4, ICD9, and patient details. At the bottom, there are buttons for 'Generate X12', 'Generate CMS 1500 PDF', 'Generate CMS 1500 TEXT', 'Mark as Cleared', 'Re-Open', and 'CMS 1500 Margins: Left: 24 Top: 20'. A link at the bottom left is 'http://opensourceemr.com:2097/openemr/interface/billing/billing_report.php#'

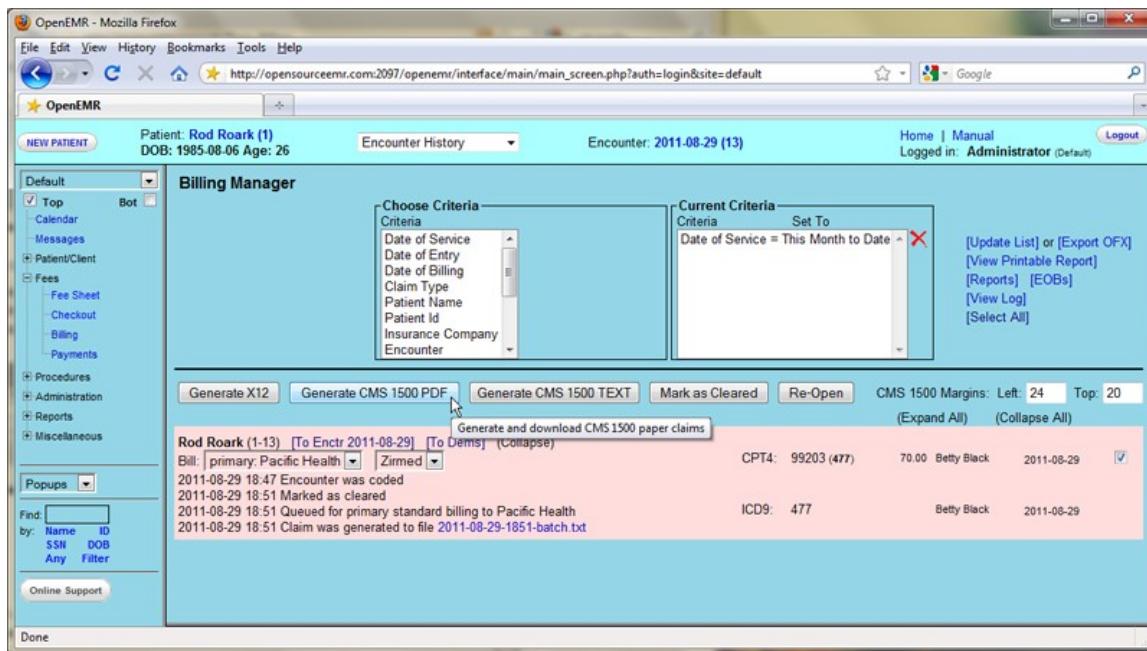
Click 'Expand' next to the desired Encounter to view its details.



Generating HCFA Forms

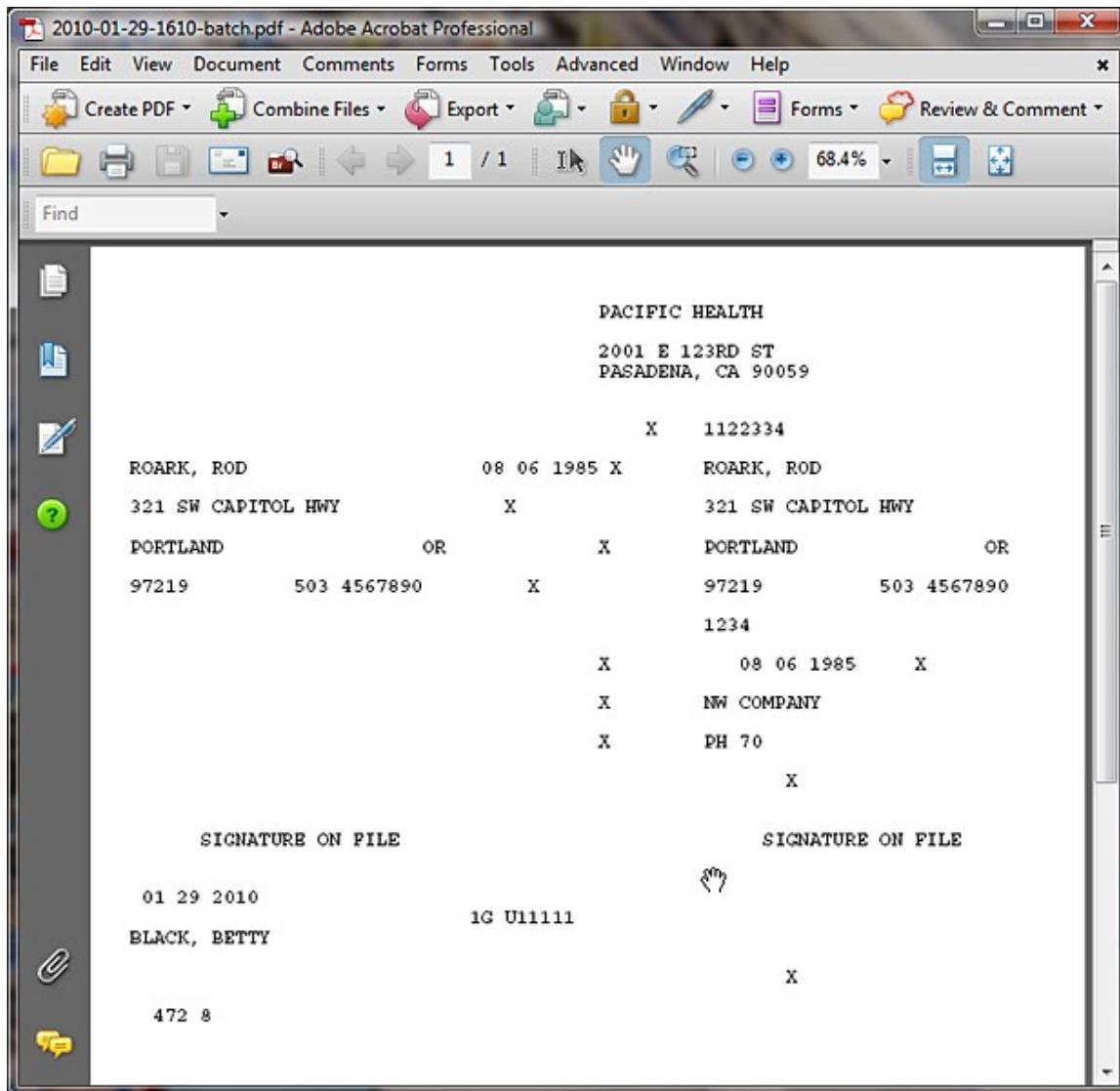
In OpenEMR multiple forms may be generated for each claim.

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.

The screenshot shows the OpenEMR Billing Manager interface. The top navigation bar includes links for File, Edit, View, History, Bookmarks, Tools, Help, and a search bar for 'http://opensourceemr.com:2097/openemr/interface/main/main_screen.php?auth=login&site=default'. The main header displays 'Patient: Rod Roark (1)', 'DOB: 1985-08-06 Age: 26', 'Encounter History' dropdown, 'Encounter: 2011-08-29 (13)', 'Home | Manual', 'Logged in: Administrator (Default)', and a 'Logout' link.

The left sidebar contains links for NEW PATIENT, Default, Top, Calendar, Messages, Patient/Client, Fees (Fee Sheet, Checkout, Billing, Payments), Procedures, Administration, Reports, and Miscellaneous. A 'Popups' dropdown is also present.

The central area is titled 'Billing Manager' and features two main sections: 'Choose Criteria' and 'Current Criteria'. The 'Choose Criteria' section lists options like Date of Service, Date of Entry, Date of Billing, Claim Type, Patient Name, Patient Id, Insurance Company, and Encounter. The 'Current Criteria' section shows 'Criteria: Date of Service = This Month to Date' and a red 'X' button to clear it. To the right of these sections are buttons for [Update List] or [Export OFX], [View Printable Report], [Reports] [EOBs], [View Log], and [Select All].

Below the criteria sections are buttons for Generate X12, Generate CMS 1500 PDF, Generate CMS 1500 TEXT, Mark as Cleared, Re-Open, CMS 1500 Margins: Left 24 Top 20, (Expand All), and (Collapse All).

The main patient information for 'Rod Roark (1-13)' is displayed, including 'To Enctr 2011-08-29' and 'To Dems' buttons. Below this, a list of encounter details is shown:

| Bill | Primary | CPT4 | Total | Date | |
|------------------|---|-------------|-------|-------------|------------|
| Pacific Health | Zirmed | 99203 (477) | 70.00 | Betty Black | 2011-08-29 |
| 2011-08-29 18:47 | Encounter was coded | | | | |
| 2011-08-29 18:51 | Marked as cleared | | | | |
| 2011-08-29 18:51 | Queued for primary standard billing to Pacific Health | | | | |
| 2011-08-29 18:51 | Claim was generated to file 2011-08-29-1851-batch.txt | | | | |
| 2011-08-29 18:53 | Marked as cleared | | | | |
| 2011-08-29 18:53 | Queued for primary hcfa billing to Pacific Health | | | | |
| 2011-08-29 18:53 | Claim was generated to file 2011-08-29-1853-batch.pdf | | | | |

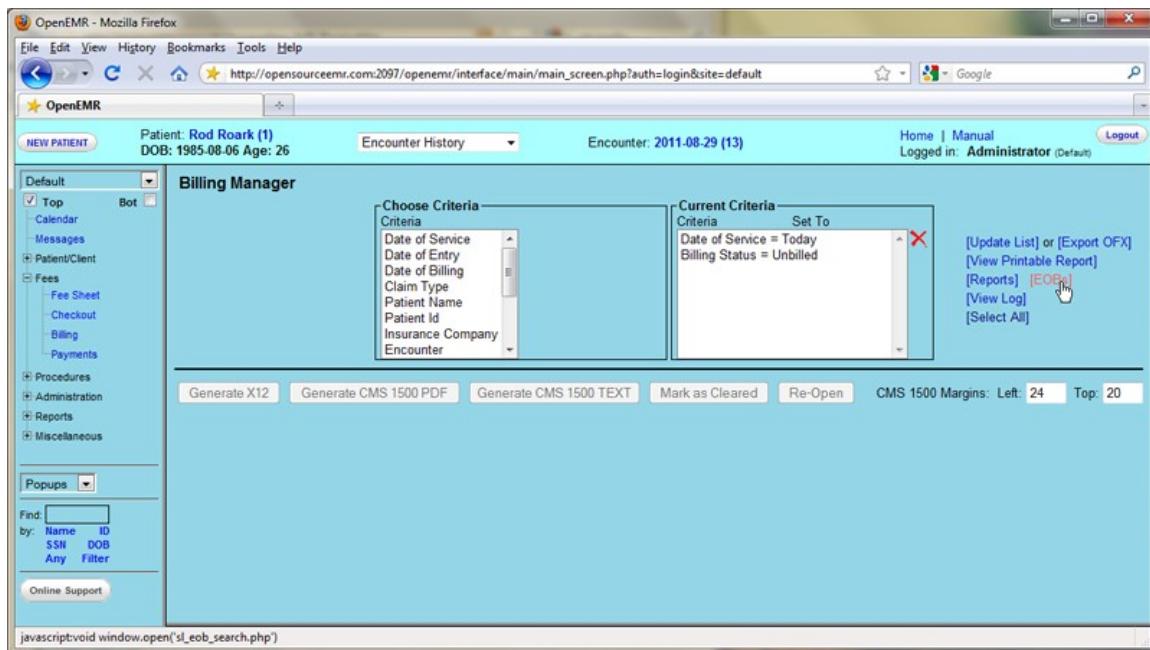
At the bottom, there are 'Online Support' and 'Done' buttons.

Accounting & Receivables

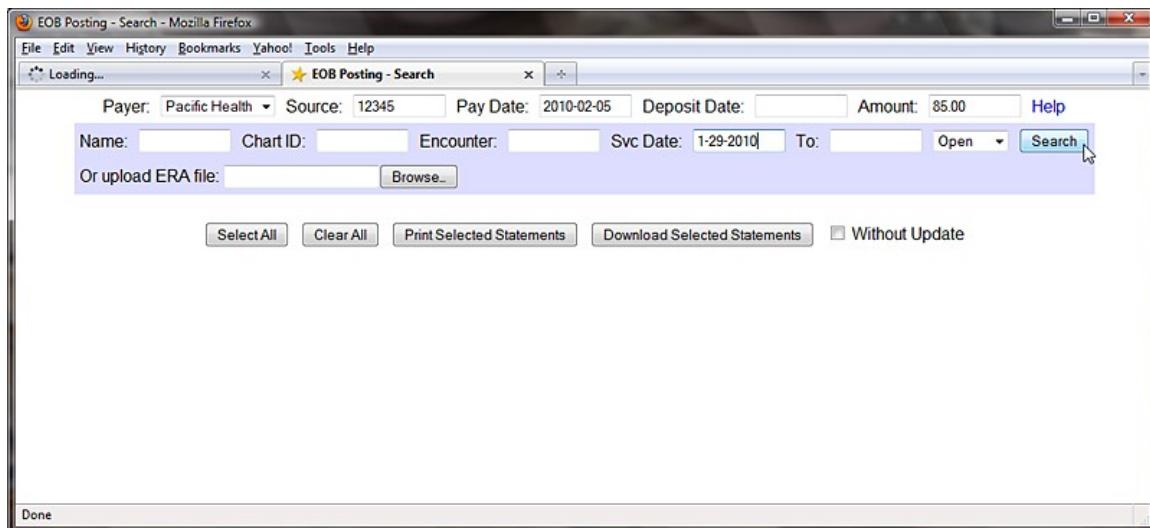
Users classified as Accounting or Administrator are also authorized to enter receivables for the clinic. Checks received from insurance companies can be entered here and distributed to cover the appropriate encounters. Patients can also be billed, and their payments recorded.

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 "File Edit View History Bookmarks Yahoo! Tools Help". Below it is a toolbar with "OpenEMR" and "EOB Posting - Search" buttons. The main area has search fields for "Payer: Pacific Health", "Source: 12345", "Pay Date: 2010-02-05", "Deposit Date: [empty]", "Amount: 85.00", and "Help". There are also fields for "Name:", "Chart ID:", "Encounter:", "Svc Date: 1-29-2010", "To: [empty]", "Open" dropdown, and a "Search" button. Below these is a "Browse..." button for "Or upload ERA file:". A table lists invoices:

| Patient | Invoice | Svc Date | Last Stmt | Charge | Adjust | Paid | Balance | Prv | Sel |
|------------|----------------------|------------|-----------|--------|--------|------|---------|-----|--------------------------|
| Roark, Rod | 1.15 | 2010-01-29 | | 136.57 | | | 136.57 | -1 | <input type="checkbox"/> |

Buttons at the bottom include "Select All", "Clear All", "Print Selected Statements", "Download Selected Statements", and a checkbox for "Without Update". At the very bottom is a "Done" button.

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 "File Edit View History Bookmarks Yahoo! Tools Help". Below it is a toolbar with "OpenEMR" and "EOB Posting - Search" buttons. The main area displays invoice details: Patient: Rod Roark, Provider: Betty Black Ins1: Pacific Health, Ins2: MedOne, Invoice: 1.15, Svc Date: 2010-01-29, Done with: Ins1, Ins2, Ins3, Patient, Check/EOB No.: 12345, Last Bill Date: 2010-01-29, Now posting for: Ins1, Ins2, Ins3, Patient, Check/EOB Date: 2010-02-05, and a checkbox for "Needs secondary billing". Buttons include "Save" (highlighted), "Cancel", and "Deposit Date: [empty]". Below is a table:

| Code | Charge | Balance | By/Source | Date | Pay | Adjust | Reason |
|-------|--------|---------|-----------|------|-----|--------|--------|
| 99203 | 136.57 | 136.57 | | | 85 | | W |

At the bottom is a "Done" button.

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.

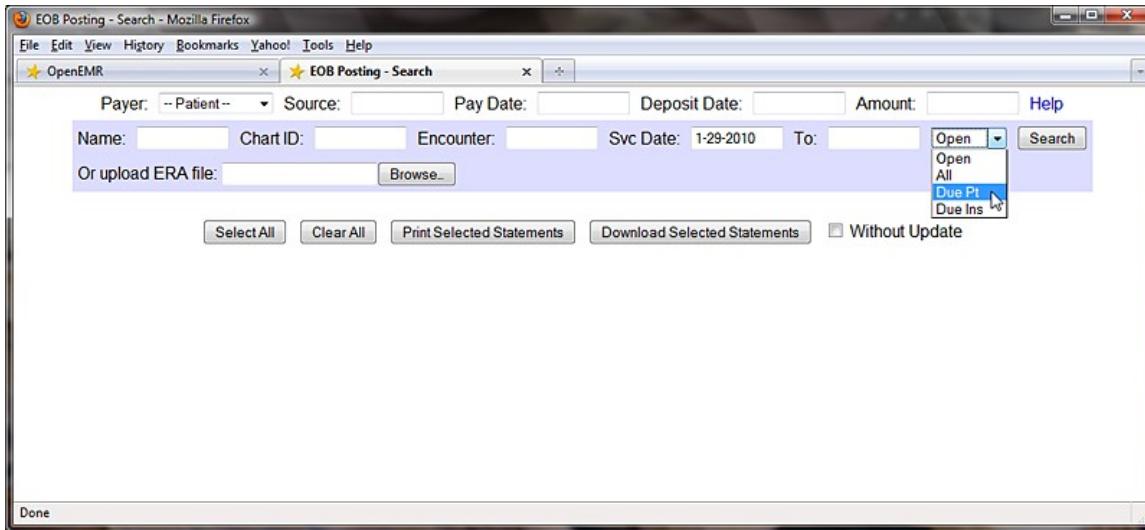
Payment amounts are now shown along with the remaining balance. The number in the 'Prv' column has also decreased. Select the invoice number to bring up the EOB Invoice window again.

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

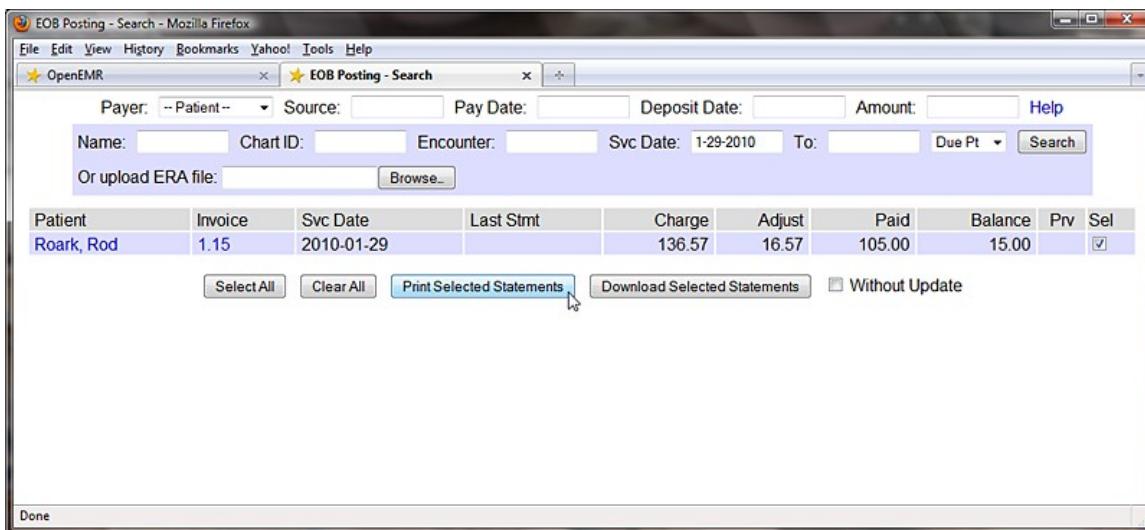
Invoice adjustments may also be made here. Enter the adjustment amount (or click 'W' to waive the entire remaining balance), and select a reason for the adjustment from the drop-down list provided. Click 'Save' when finished.

Patient Invoices and Payments

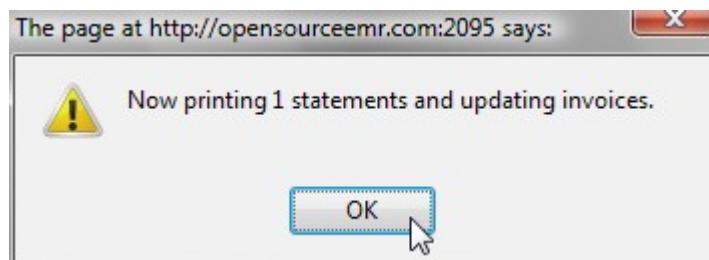
Once payments from the insurance companies have been received and entered, you can use OpenEMR's EOB page to generate invoices for billing patients the remaining amounts.



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.



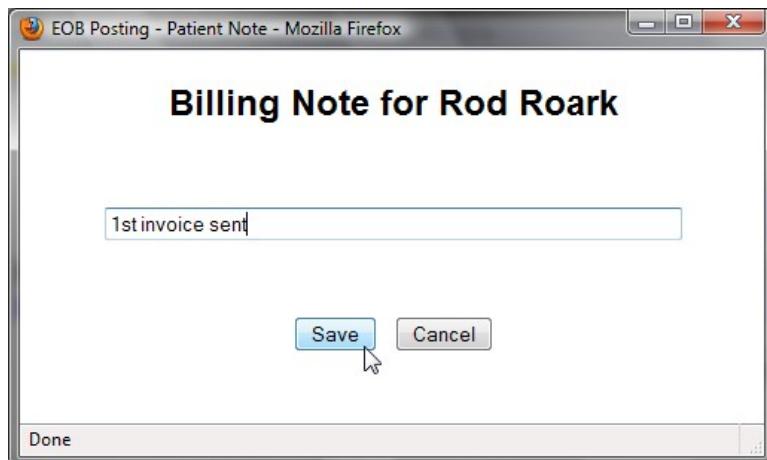
Check the box next to the desired invoice and click 'Print Selected Statements' to generate an invoice for that patient using a customizable template. Depending on your clinic's OpenEMR configuration, the invoice may be printed automatically.



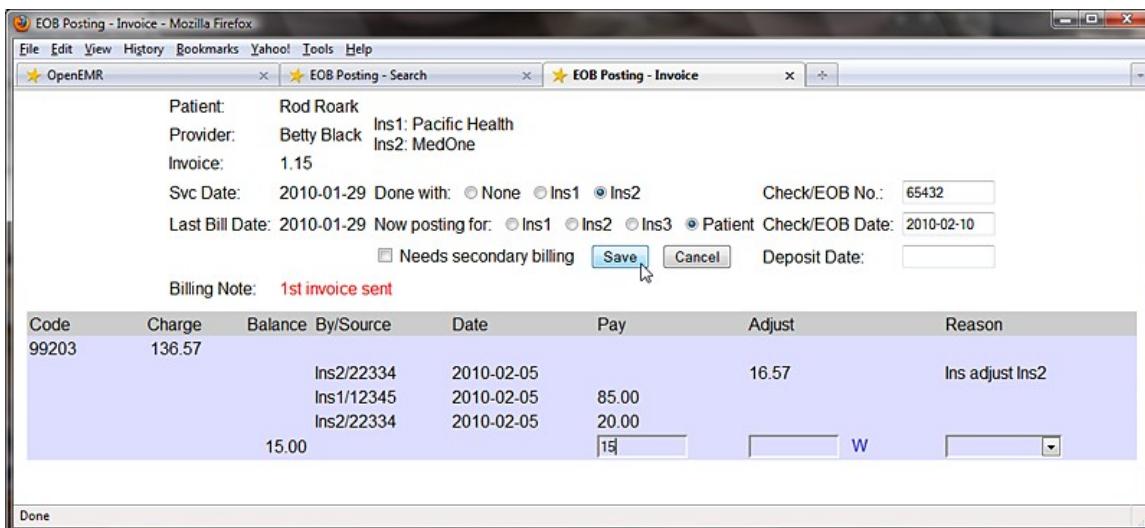
A '1' in the 'Prv' column now indicates that the patient has been billed once for this claim. This number will

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'.



| Code | Charge | Balance | By/Source | Date | Pay | Adjust | Reason |
|-------|--------|---------|--|--|-------------------------|--------|-----------------|
| 99203 | 136.57 | | Ins2/22334 Ins1/12345 Ins2/22334 | 2010-02-05 2010-02-05 2010-02-05 | 85.00 20.00 15.00 | 16.57 | Ins adjust Ins2 |

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.

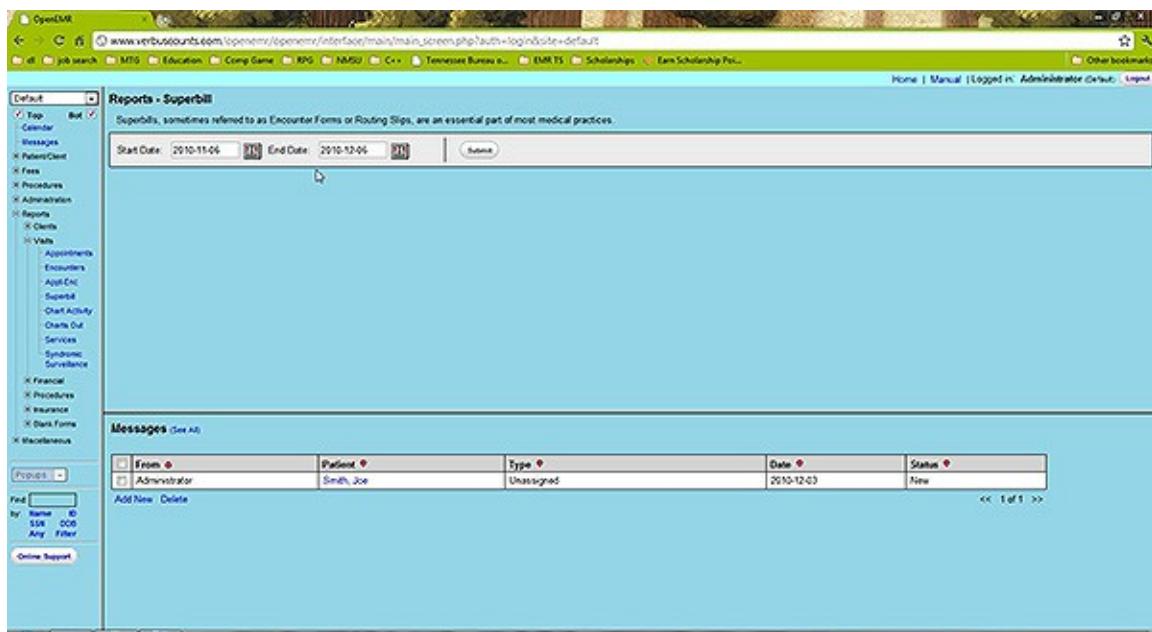
General Reports

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.

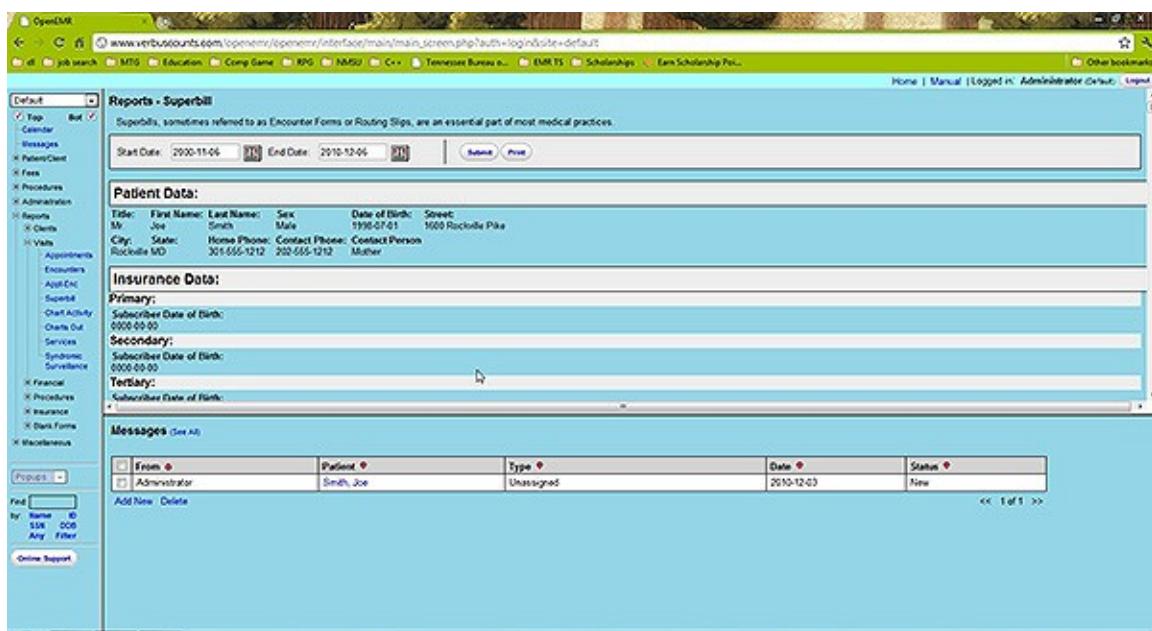
The screenshot shows the OpenEMR web interface. At the top, the URL is www.verbuscounts.com/openemr/interface/main/main_screen.php?auth=log.indiscrete+default. The title bar says "OpenEMR". The top menu includes links like Home, Manual, Logout, and Other Bookmarks. On the left, a navigation tree shows categories like Top, Bottom, Calendar, Messages, Patient Client, Fees, Procedures, Administration, Reports, Clients, Visits, Appointments, Encounters, Appt Enc, Superbill, Chart Activity, Check Out, Services, Syndromes, Surveillance, Financial, Procedures, Insurance, Dark Forms, and Miscellaneous. A search bar and a "Today" button are also present. The main content area displays a calendar for December 2010 with various entries. Below the calendar is a "Providers" list with "Administrator" selected. At the bottom, there is a "Messages (Set All)" section with one item listed: "From: Administrator, Patient: Smith, Joe, Type: Unsigned, Date: 2010-12-03, Status: New". A footer at the bottom left says "Find by Name, ID, LName, Any Filter" and "Online Support".

Examples of Commonly Used Reports

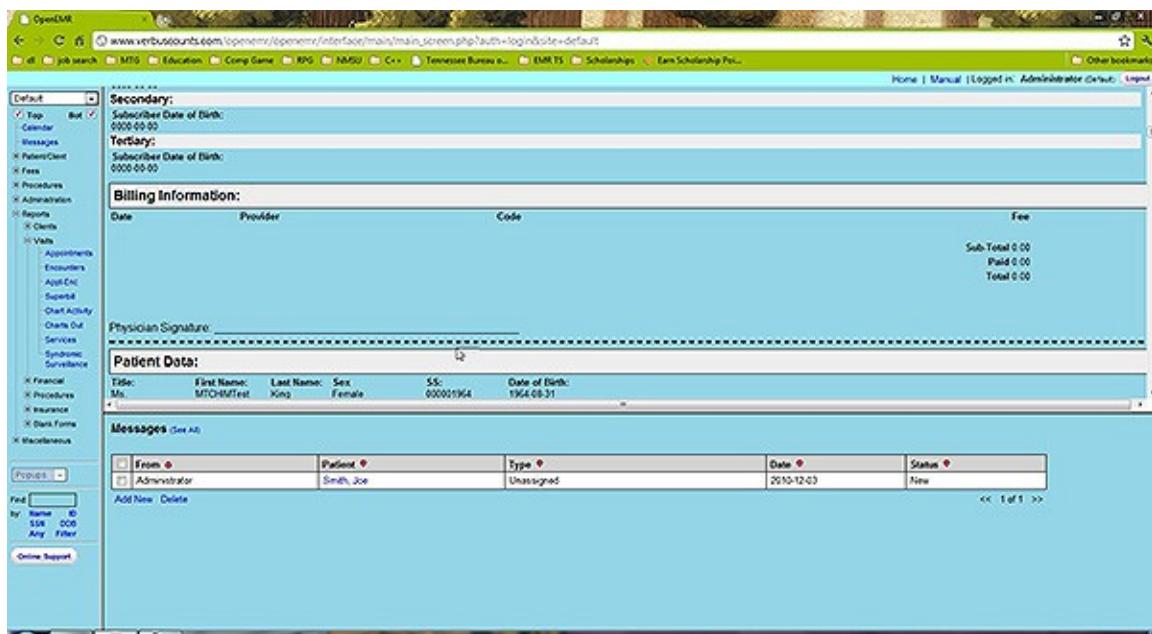
Clicking 'Reports – Visits – Superbill' brings up the Superbill Report page. This presents you with a dialog for selecting a date range.



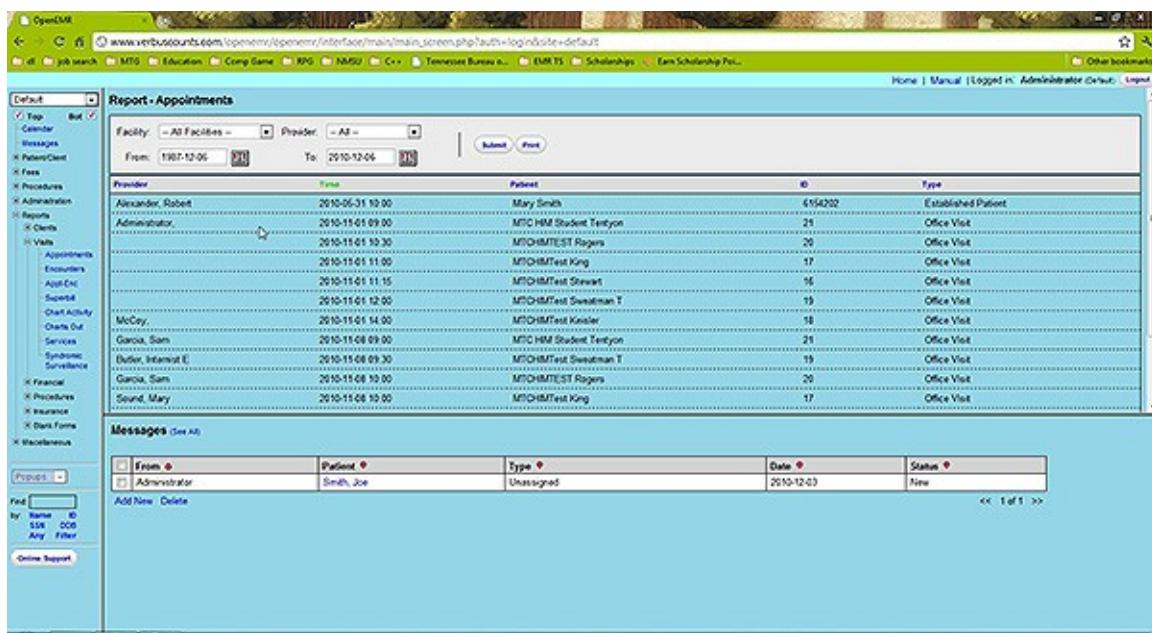
Clicking 'Submit' produces a report for each encounter in the date range, and shows patient demographics and insurance information



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.

Report - Appointments and Encounters

| Practitioner | Date/Appt | Patient | ID | Chart | Encounter | Charges | Copies | Billed | Error |
|------------------------------|-----------|---------|----|-------|-----------|---------|--------|--------|-------|
| Totals for Unknown | | | | | 6 | | | | |
| Totals for Administration, | | | | | 59 | 125.00 | | 125.00 | |
| Totals for Alexander, Robert | | | | | 1 | | | | |
| Totals for Butler, Internist | | | | | 1 | 225.00 | | 225.00 | |
| Totals for Garcia, Sam | | | | | 1 | | | | |
| Totals for Green, | | | | | 1 | 105.00 | | 105.00 | |
| Totals for McCoy, | | | | | 1 | 225.00 | | 225.00 | |
| Grand Totals | | | | | 55 | 730.00 | | 525.00 | |

Messages (Get All)

| From | Patient | Type | Date | Status |
|---------------|------------|------------|------------|--------|
| Administrator | Smith, Joe | Unassigned | 2010-12-03 | New |

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 | P% |
|-------------------------------------|---------|--------|----------|------|
| – No Insurance – | 635.00 | 4 | 4 | 80.0 |
| Blue Cross Blue Shield of Tennessee | 225.00 | 1 | 1 | 20.0 |

Messages (Get All)

| From | Patient | Type | Date | Status |
|---------------|------------|------------|------------|--------|
| Administrator | Smith, Joe | Unassigned | 2010-12-03 | New |

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

Report - Indigent Patients

| Patient | SSN | Invoice | Sort Date | Due Date | Amount | Paid | Balance |
|---------|-----|---------|-----------|----------|--------|------|---------|
| | | | | | | | |

Messages (Get All)

| From * | Patient * | Type * | Date * | Status * |
|---------------|------------|------------|------------|----------|
| Administrator | Smith, Joe | Unassigned | 2010-12-03 | New |

Add New | Delete << 1 of 1 >>

Billing Reports

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

Billing Report

| From: | To: | <input checked="" type="checkbox"/> Unbilled Only | <input type="checkbox"/> Authorized Only | [Update List] or [Export CSV] | [View Log] | [Select All] |
|------------------|----------------|---|--|-------------------------------|------------|--------------|
| From: 2010-12-04 | To: 2010-12-05 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | [Update List] or [Export CSV] | [View Log] | [Select All] |

Generate XLS Generate CMS-1500 PDF Generate CMS-1500 TEXT Mark as Cleared Re-Open CMS 1500 Margin: Left: 24 Top: 20

Messages (Get All)

| From * | Patient * | Type * | Date * | Status * |
|---------------|------------|------------|------------|----------|
| Administrator | Smith, Joe | Unassigned | 2010-12-03 | New |

Add New | Delete << 1 of 1 >>

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

| Report - Cash Receipts by Provider | | | |
|------------------------------------|----------------|---------------|---|
| Facility: | Provider: | Payment Date: | |
| From: 1987-12-01 | To: 2010-12-06 | | <input type="button" value="Submit"/> <input type="button" value="Print"/> |
| GPT: | ICD: | | <input checked="" type="checkbox"/> Details <input type="checkbox"/> Procedures |
| Practitioner | Date | Received | |
| Totals for Administrator | | 125.00 | |
| Totals for Robert Alexander | | 130.00 | |
| Totals for McCoy | | 200.00 | |
| Totals for Internist Butler | | 75.00 | |
| Totals for Green | | 105.00 | |
| Grand Totals | | 655.00 | |

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 | | | |
|------------------------------------|----------------|---------------|---|
| Facility: | Provider: | Payment Date: | |
| From: 1987-12-01 | To: 2010-12-06 | | <input type="button" value="Submit"/> <input type="button" value="Print"/> |
| GPT: | ICD: | | <input checked="" type="checkbox"/> Details <input type="checkbox"/> Procedures |
| Practitioner | Date | Received | |
| Administrator | 2010-11-01 | 125.00 | |
| | 2010-11-01 | 15.00 | |
| | 2010-11-01 | -15.00 | |
| Totals for Administrator | | 125.00 | |
| Robert Alexander | 2010-12-04 | 130.00 | |
| Totals for Robert Alexander | | 130.00 | |
| McCoy | 2010-11-01 | 25.00 | |
| | 2010-11-01 | 200.00 | |
| Totals for McCoy | | 225.00 | |
| Internist Butler | 2010-11-01 | 35.00 | |
| | 2010-11-01 | -35.00 | |
| Totals for Internist Butler | | 75.00 | |
| Green | 2010-11-01 | 105.00 | |
| Totals for Green | | 105.00 | |
| Grand Totals | | 655.00 | |

Patient Reports

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'.

OpenEMR

www.verbouscounts.com/openemr/openemr/interface/main/main_screen.php?auth+logindate+default

Patient: Joe Smith (4129532) DOB: 1996-07-01 Age: 12

Home | Manual | Logged in: Administrator (Logout) | Logoff | Other bookmarks

Patient Report [Check All] [Clear All]

Demographics Immunizations
 History Patient Notes
 Insurance Transactions
 Billing Communications

Generate Report

Issues: Encounters & Forms:

Allergies: penicillin 2009-02-01 Active, penicillin 2010-12-01 Active, Tylenol 2010-12-01 Active

Medical Problems: bronchitis 2010-12-01 Active

Medications: Tylenol 2010-12-01 Active

Encounters & Forms:

| Date | Issue | Reason/Tons | Provider | Billing | Broadcast |
|------------|----------------------------------|-------------|-------------------|---------|------------|
| 2010-12-01 | SOPA | | Alexander, Robert | 3 | 2010-12-01 |
| 2009-02-01 | Vitals | | Administrator | | 2009-02-01 |
| 2008-04-02 | Vitals | | Administrator | | 2008-04-02 |
| 2007-01-01 | Vitals | | Administrator | | 2007-01-01 |
| 2003-07-12 | DTP, MMR, IPV immunization given | | Administrator | | 2003-07-12 |
| 2000-06-15 | PCV Immunization | | Administrator | | 2000-06-15 |

This produces a report including all the specified patient information.

OpenEMR

www.verbouscounts.com/openemr/openemr/interface/main/main_screen.php?auth+logindate+default

Patient: Joe Smith (4129532) DOB: 1996-07-01 Age: 12

Home | Manual | Logged in: Administrator (Logout) | Logoff | Other bookmarks

Patient Report (Raw)

[Printable Version]

Patient Data:

Who: Name: Mr. Joe Smith, External ID: 4129532, DOB: 1996-07-01, Sex: Male, S.S.: LicenseeID:
 Contact: Marital Status: User Defined: Address: 1000 Rockville Pike, City: Rockville, State: Maryland, Postal Code: Mother's Name: Jessica N. Smith, Emergency Contact: Mother, Home Phone: 301-555-1212, Mobile Phone:
 Choices: Guardian's Name: Jessica N. Smith, Emergency Phone: 202-555-1212, Work Phone:, Contact Email:, Provider:, Pharmacy:
 HIPAA Notice Received: Allow Voice Message: Leave Message With: Allow Mail Message: Allow SMS: Allow Email:

Past Encounters and Documents: (Change View)

| Date | Issue | Reason/Tons | Provider | Billing | Broadcast |
|------------|----------------------------------|-------------|-------------------|---------|------------|
| 2010-12-01 | SOPA | | Alexander, Robert | 3 | 2010-12-01 |
| 2009-02-01 | Vitals | | Administrator | | 2009-02-01 |
| 2008-04-02 | Vitals | | Administrator | | 2008-04-02 |
| 2007-01-01 | Vitals | | Administrator | | 2007-01-01 |
| 2003-07-12 | DTP, MMR, IPV immunization given | | Administrator | | 2003-07-12 |
| 2000-06-15 | PCV Immunization | | Administrator | | 2000-06-15 |

OpenEMR

www.verbouscounts.com/openemr/openemr/interface/main/main_screen.php?auth=login&site=default

Patient: Joe Smith (1205032) DOB: 1998-07-01 Age: 12

Home | Manual | Logged in: Administrator (Logout) | Logoff | Other bookmarks

Choices

| | |
|--|----------------------------------|
| Provider: | Pharmacy: |
| HIPAA Notice Received: | Allow Voice Message: |
| Leave Message With: | Allow Mail Message: |
| Allow SMS: | Allow Email: |
| Allow Immunization Registry Use: | Allow Immunization Info Sharing: |
| Allow Health Information Exchange: | |
| Employer: | Occupation: |
| Employer Address: | Employer Name: |
| State: | City: |
| Country: | Postal Code: |
| Language: | Race/Ethnicity: |
| Financial Review Date: 0000-00-00 00:00:00 | Family Size: |
| Monthly Income: | Homeless, etc.: |
| Interpreter: | Migrant/Seasonal: |
| Referral Source: | VFC: |

Billing Information:

by Name ID
SSN CCR
Any Filter

Online Support

Past Encounters and Documents (To Billing View)

| Date | Issue | Reason/Treatment | Provider | Billing | Insurance |
|------------|----------------------------------|------------------|-------------------|---------|------------|
| 2010-12-01 | SOP | | Alexander, Robert | 3 | 2010-12-01 |
| 2009-02-01 | Vitals | | Administrator | | 2009-02-01 |
| 2008-04-02 | Vitals | | Administrator | | 2008-04-02 |
| 2007-01-01 | Vitals | | Administrator | | 2007-01-01 |
| 2003-07-12 | DTP, MMR, IPV immunization given | | Administrator | | 2003-07-12 |
| 2000-06-15 | POV Immunization | | Administrator | | 2000-06-15 |