

# OpenEMR Users Guide

Based on Version 3.0.1

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## Getting Started

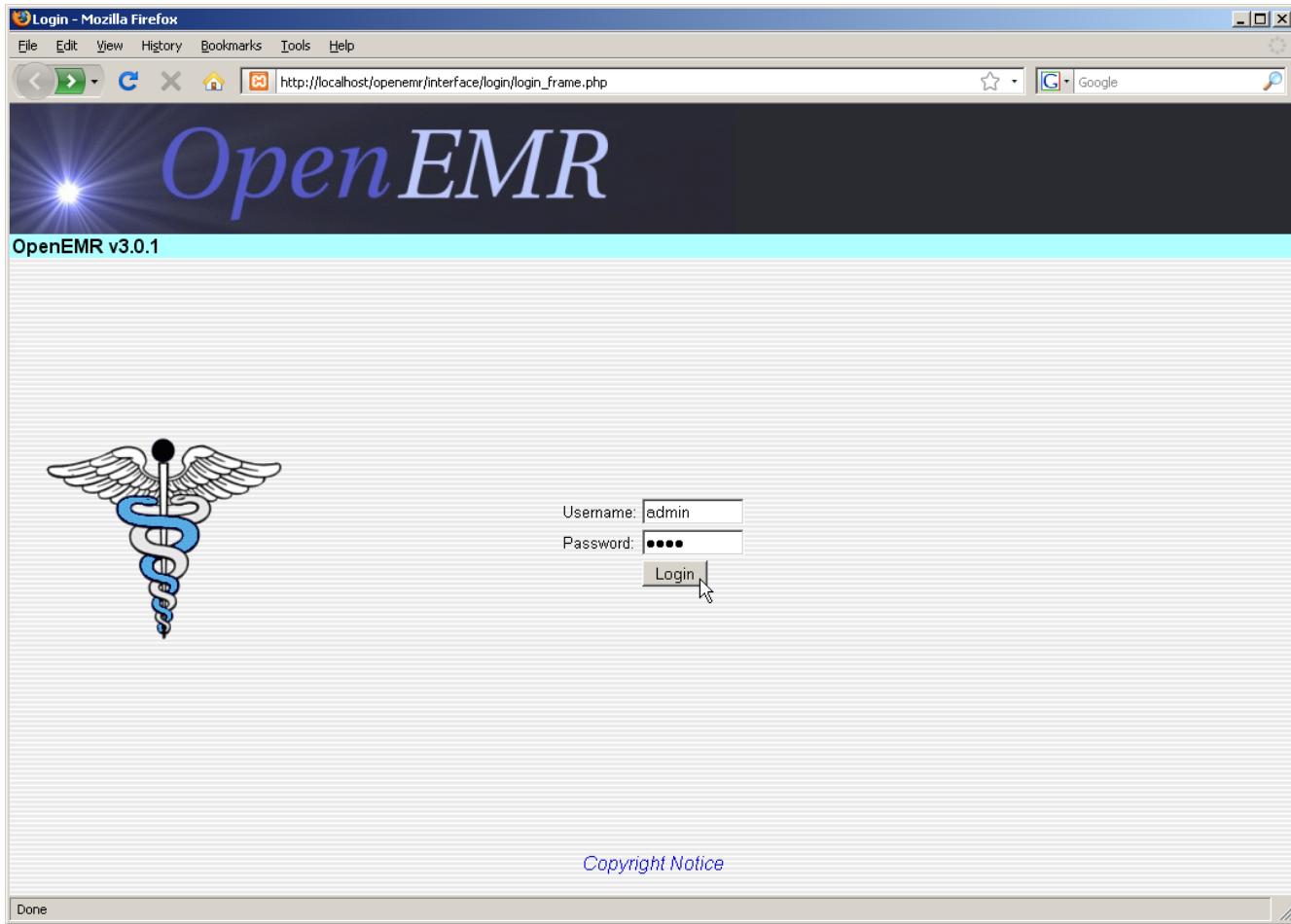
### Getting to the Login Page

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 with a your own username and password. ( Note that the OpenEMR login is case-sensitive.) 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 'Password' from the navigation list on the left.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The address bar shows the URL "http://localhost/openemr/interface/main/main\_screen.php?auth=login". The top menu bar includes File, Edit, View, History, Bookmarks, Tools, and Help. On the right side of the header, it says "Active Patient: None" and the date "April 22, 2009". The main content area has a title "Logged in: Administrator (Default)" and "Password Change". It displays a message: "Once you change your password, you will have to re-login." Below this, there are fields for "Real Name", "Username" (set to "admin"), "Password" (containing four dots), and "Password (Again)" (also containing four dots). A "Save Changes" button is highlighted with a cursor. On the left, a vertical navigation menu lists various modules like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. At the bottom left, there's a sidebar with "Active Patient: None", "Active Encounter: None", a "Popups" dropdown set to "Popups", a search bar with "Find:" and "by: Name ID SSN DOB", and a "Logout" link. A "Done" button is at the bottom right.

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.

## Main Screen & Navigation

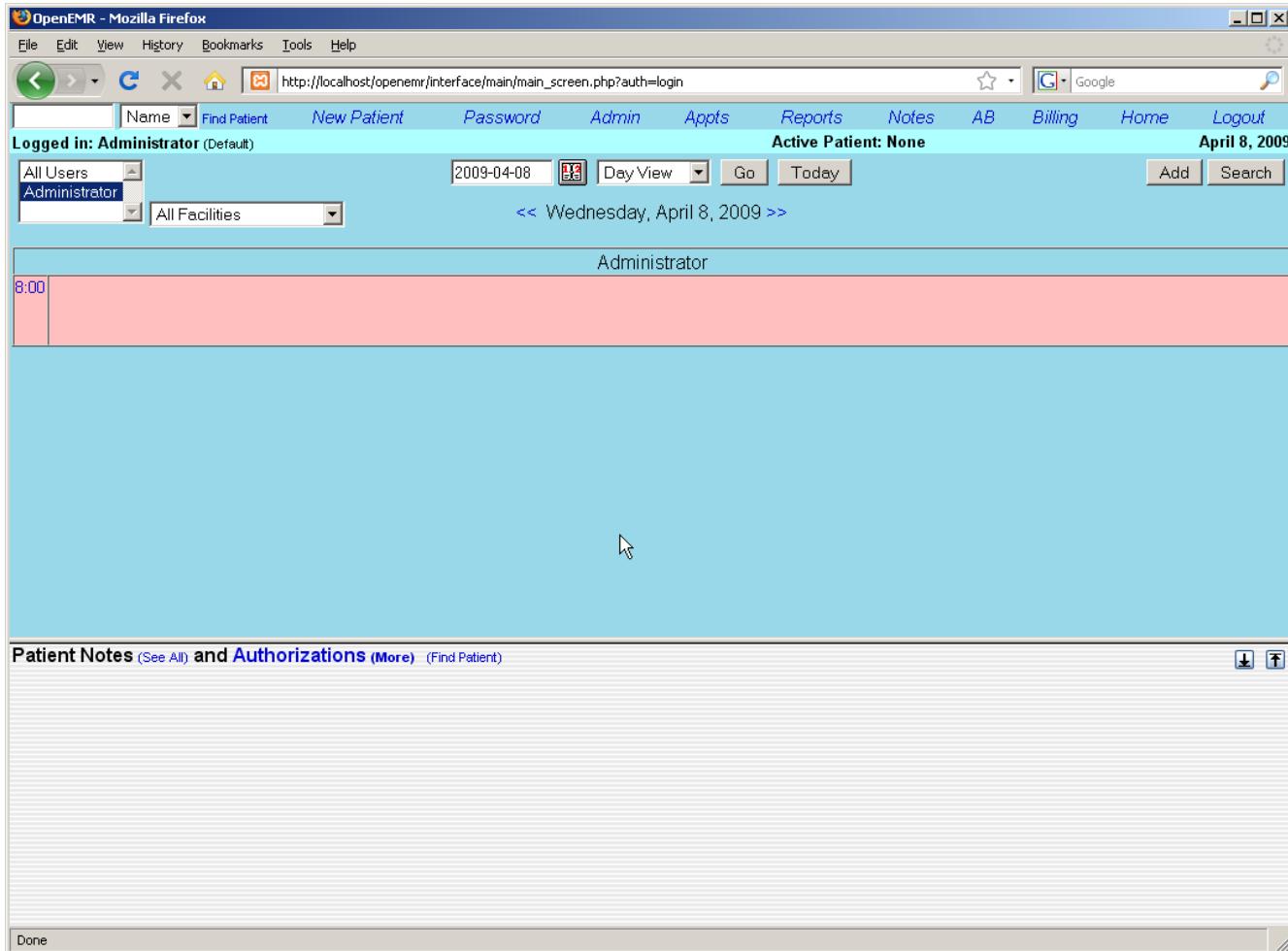
A successful login will bring you to the main screen of OpenEMR. The user is presented with two windows, the Calendar, and below that, the Patient Notes & Authorizations page.

### 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.

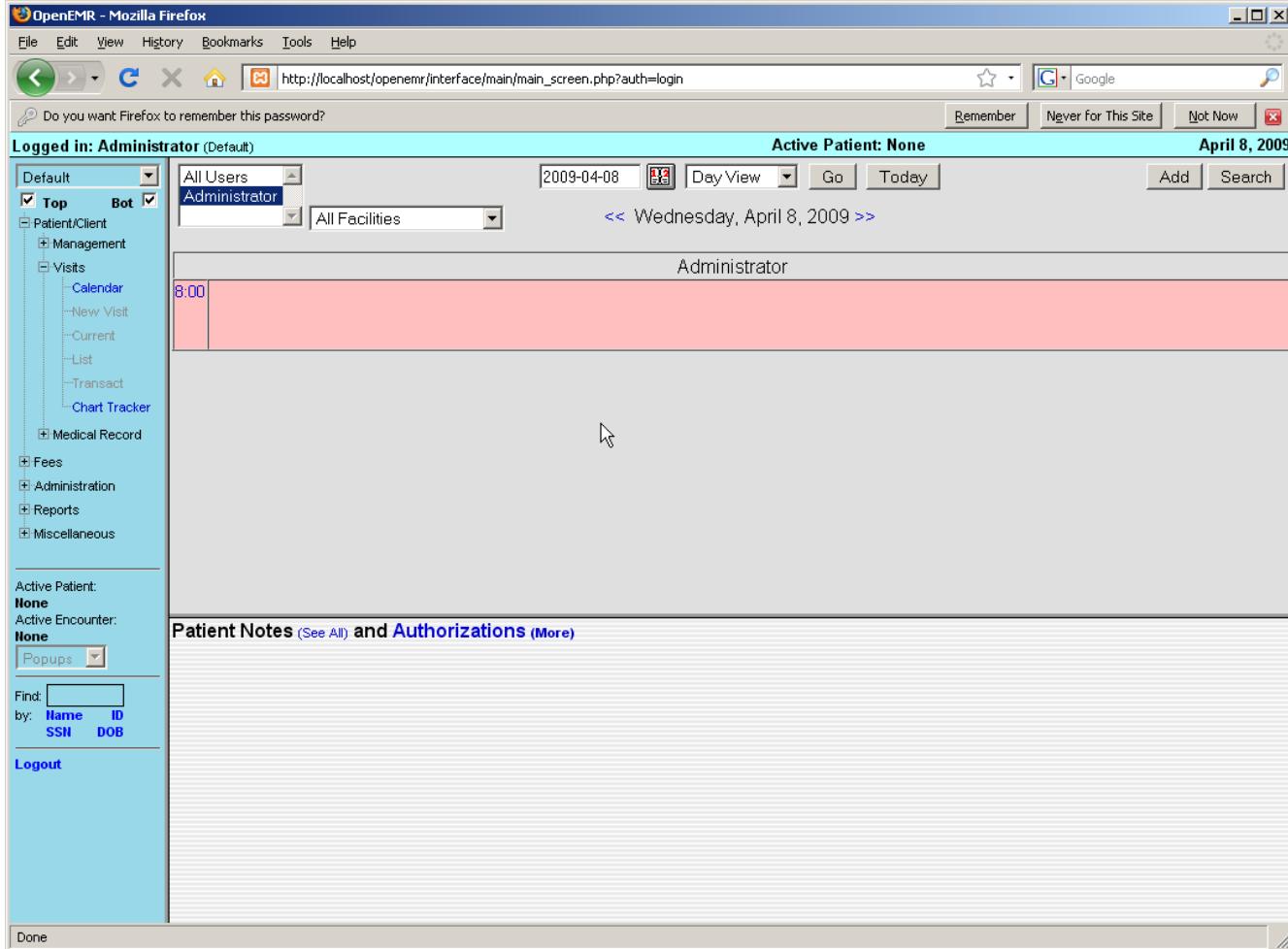


In the Traditional navigation scheme related pages are linked. Pages load simultaneously to facilitate the data entry process.

## Tree View

The Tree View 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.



## Radio Buttons

The Radio Button scheme is the default navigation scheme for OpenEMR 3.0. It functions similar to the Tree View except that the links are presented as an unordered list, with a series of radio button 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 purposes of this Users Guide, we will assume you are using the default navigation scheme, the Radio Button scheme described above.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

All Users    Add Search

Administrator All Facilities << Wednesday, April 8, 2009 >>

Administrator

8:00

Patient Notes (See All) and Authorizations (More)

Active Patient: None  
Active Encounter: None  
Popups

Find:   
by: Name ID  
SSN DOB

Logout Done

## 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 'Admin' from the navigation list on the left of the screen.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main menu includes File, Edit, View, History, Bookmarks, Tools, and Help. The top right shows "Active Patient: None" and the date "April 8, 2009". The left sidebar has a "Logged in: Administrator (Default)" section with a "Top Bot" checkbox checked. Below it is a list of various clinical modules like Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. The main content area is titled "User and Facility Administration". It contains two main sections: "New Facility Information:" and "Edit Facilities: New User:". The "Edit Facilities" section is active, showing fields for "Your Clinic Name Here" (with an "Edit" link), Username, Groupname (set to "Default"), and other user details like First Name, Last Name, Federal Tax ID, UPIN, NPI, Taxonomy, and Job Description. At the bottom, there's a "Patient Notes (See All) and Authorizations (More)" section and a footer with links for Active Patient, Active Encounter, Popups, Find, Logout, and the URL http://localhost/openemr/interface/usergroup/facility\_admin.php?fid=3.

This will bring up the User & 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.

### 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, click 'edit' next to the line labeled "Your Clinic Name Here"

This takes you to the Edit Facility page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top  Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Blk
- Chart Trk
- Billing
- Superbill
- Auth/Notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- RX
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

**Edit Facility Information**

Name:	Your Clinic Name Here	Phone as (000) 503-123-4567
		000-0000:
		Fax as (000) 503-123-4568
		000-0000:
Address:	1234 SW Main St	City: Portland
State:	OR	Zip Code: 97205
Country:	USA	Federal EIN: 11-2222222
Billing Location:	<input checked="" type="checkbox"/>	Facility NPI: [ ]
Service Location:	<input type="checkbox"/>	Accepts Assignment <input checked="" type="checkbox"/> (only if billing location):
POS Code:	11: Office	
Billing Attn:	Cindy Cyan	
CLIA Number:	12345678	

[\[Back\]](#)

Patient Notes ([See All](#)) and Authorizations ([More](#))

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 'Update' button, then click 'Back' to return to the User & Facility Administration page.

Your clinic may have additional facilities in which care is given, such as a hospital. To add these, enter them into the "New Facility Information" section and click the 'Add' button.

## User Administration

The bottom of the User & Facility Admin 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 filling in the form to the right of the "New User" heading and then clicking 'Add.' Or you can modify an existing user by clicking the 'Edit' link next to that user's name.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top	Bot	Users	Forms	Practice	ACL	Calendar	Database	Notification	Language	Lists	Layouts	Backup	Logs																																																																																																															
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/> Calendar <input type="radio"/> Password <input checked="" type="radio"/> Admin <input type="radio"/> Reports <input type="radio"/> Ofc Notes <input type="radio"/> Fax/Scan <input type="radio"/> Addr Blk <input type="radio"/> Chart Trk <input type="radio"/> Billing <input type="radio"/> Superbill <input type="radio"/> Auth/notes <input type="radio"/> New Pt <input type="radio"/> Patient <input type="radio"/> History <input type="radio"/> Encounters <input type="radio"/> New Enctr <input type="radio"/> Rx <input type="radio"/> Issues <input type="radio"/> Immunize <input type="radio"/> Documents <input type="radio"/> Pt Report <input type="radio"/> Pt Notes <input type="radio"/> Transact <input type="radio"/> Summary <input type="radio"/> Encounter <input type="radio"/> Charges																																																																																																																										
<table border="1"> <tr> <td>First Name:</td> <td><input type="text"/></td> <td>Middle Name:</td> <td><input type="text"/></td> </tr> <tr> <td>Last Name:</td> <td><input type="text"/></td> <td>Default Facility:</td> <td><input type="text"/>Your Clinic Name Here</td> </tr> <tr> <td>Federal Tax ID:</td> <td><input type="text"/></td> <td>Federal Drug ID:</td> <td><input type="text"/></td> </tr> <tr> <td>UPIN:</td> <td><input type="text"/></td> <td>See Authorizations:</td> <td><input type="text"/>None</td> </tr> <tr> <td>NPI:</td> <td><input type="text"/></td> <td>Job Description:</td> <td><input type="text"/></td> </tr> <tr> <td>Taxonomy:</td> <td><input type="text"/>207Q00000X</td> <td colspan="3"></td> </tr> <tr> <td>Calendar UI:</td> <td><input type="text"/>Default</td> <td colspan="3"></td> </tr> <tr> <td>Access Control:</td> <td colspan="3"> <input type="text"/>Accounting  <input type="text"/>Administrators  <input type="text"/>Clinicians  <input type="text"/>Front Office  <input type="text"/>Physicians         </td> <td><input type="text"/></td> </tr> <tr> <td colspan="5">Additional Info:</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td colspan="14"><input type="checkbox"/> Include inactive users</td> </tr> <tr> <td>Username</td> <td>Real Name</td> <td>Info</td> <td colspan="3">Authorized?</td> <td colspan="8"></td> </tr> <tr> <td>admin(Edit)</td> <td>Administrator</td> <td></td> <td colspan="3">yes</td> <td colspan="8"></td> </tr> <tr> <td>black(Edit)</td> <td>Betty Black</td> <td>Cell: 503-987-6543</td> <td colspan="3">yes</td> <td colspan="8"></td> </tr> <tr> <td>Green(Edit)</td> <td>Gary Green</td> <td></td> <td colspan="3">yes</td> <td colspan="8"></td> </tr> </table>														First Name:	<input type="text"/>	Middle Name:	<input type="text"/>	Last Name:	<input type="text"/>	Default Facility:	<input type="text"/> Your Clinic Name Here	Federal Tax ID:	<input type="text"/>	Federal Drug ID:	<input type="text"/>	UPIN:	<input type="text"/>	See Authorizations:	<input type="text"/> None	NPI:	<input type="text"/>	Job Description:	<input type="text"/>	Taxonomy:	<input type="text"/> 207Q00000X				Calendar UI:	<input type="text"/> Default				Access Control:	<input type="text"/> Accounting <input type="text"/> Administrators <input type="text"/> Clinicians <input type="text"/> Front Office <input type="text"/> Physicians			<input type="text"/>	Additional Info:					<input type="button" value="Add"/>	<input type="checkbox"/> Include inactive users														Username	Real Name	Info	Authorized?											admin(Edit)	Administrator		yes											black(Edit)	Betty Black	Cell: 503-987-6543	yes											Green(Edit)	Gary Green		yes										
First Name:	<input type="text"/>	Middle Name:	<input type="text"/>																																																																																																																									
Last Name:	<input type="text"/>	Default Facility:	<input type="text"/> Your Clinic Name Here																																																																																																																									
Federal Tax ID:	<input type="text"/>	Federal Drug ID:	<input type="text"/>																																																																																																																									
UPIN:	<input type="text"/>	See Authorizations:	<input type="text"/> None																																																																																																																									
NPI:	<input type="text"/>	Job Description:	<input type="text"/>																																																																																																																									
Taxonomy:	<input type="text"/> 207Q00000X																																																																																																																											
Calendar UI:	<input type="text"/> Default																																																																																																																											
Access Control:	<input type="text"/> Accounting <input type="text"/> Administrators <input type="text"/> Clinicians <input type="text"/> Front Office <input type="text"/> Physicians			<input type="text"/>																																																																																																																								
Additional Info:					<input type="button" value="Add"/>																																																																																																																							
<input type="checkbox"/> Include inactive users																																																																																																																												
Username	Real Name	Info	Authorized?																																																																																																																									
admin(Edit)	Administrator		yes																																																																																																																									
black(Edit)	Betty Black	Cell: 503-987-6543	yes																																																																																																																									
Green(Edit)	Gary Green		yes																																																																																																																									
<b>Patient Notes</b> ( <a href="#">See All</a> ) and <b>Authorizations</b> ( <a href="#">More</a> )																																																																																																																												
Find: <input type="text"/> by: <input type="radio"/> Name <input type="radio"/> ID <input type="radio"/> SSH <input type="radio"/> DOB																																																																																																																												
<a href="#">Logout</a>																																																																																																																												
<a href="#">Done</a>																																																																																																																												

Clicking 'Edit' will bring up the User Administration 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.

Make sure that your practitioners are 'Authorized' by clicking the check box in the User Administration page. 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 users' information has been updated successfully click 'Save' and then 'Back' to return to the User & Facility Information page.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top  Bot

Calendar  Password  
 Admin  Reports  
 Ofc Notes  Fax/Scan  
 Addr Blk  Chart Trk  
 Billing  Superbill  
 Auth/notes  New Pt  
 Patient  History  
 Encounters  New Enctr  
 Rx  Issues  
 Immunize  Documents  
 Pt Report  Pt Notes  
 Pt Transact  Summary  
 Encounter  Charges

**User Administration**

Username: black Password: \* Leave blank to keep password unchanged.

Authorized:  Active:

First Name: Betty Middle Name:

Last Name: Black Default Facility: Your Clinic Name Here

Federal Tax ID: 111-22-3333 Federal Drug ID: 222222

UPIN: U11111 See Authorizations: None

NPI: Job Description:

Taxonomy: 207Q00000X Calendar UI: Default

Access Control: Accounting  
Administrators  
Clinicians  
Front Office  
Physicians

Additional Info:  
Cell: 503-987-6543

[Save] [Back]

Active Patient: None  
Active Encounter: None  
Popups

Find: by: Name ID SSH DOB

Logout Done

**Patient Notes** (See All) and **Authorizations** (More)

## 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 at the top of the screen will bring you to the Practice Administration page.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main menu bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL "http://localhost/openemr/interface/main/main\_screen.php?auth=login". The top right corner displays "Active Patient: None" and the date "April 10, 2009". A navigation bar below the menu contains links for Users, Forms, Practice (which is selected), ACL, Calendar, Database, Notification, Language, Lists, Layouts, Backup, and Logs. On the left, a sidebar titled "Logged in: Administrator (Default)" lists various administrative functions with icons: Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Below this is a section for "Active Patient" with "None" selected. A "Popups" dropdown menu is open. A search bar allows filtering by Name, ID, SSN, or DOB. Buttons for "Logout" and "Done" are at the bottom. The main content area is titled "Settings" and contains links for "Pharmacies" (with "Add a Pharmacy"), "Insurance Companies" (with "Add a Company"), "Insurance Numbers" (with "X12 Partners"), "Documents" (with "Edit Categories"), and "HL7 Viewer". At the bottom, there is a section for "Patient Notes (See All) and Authorizations (More)".

Click 'Add a Pharmacy' 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 'Update' to save your new pharmacy.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

**Pharmacies**  
Add a Pharmacy Name Corner Pharmacy  
Address 500 W Burnside  
**Insurance Companies**  
Add a Company Address  
City, State Zip Portland, OR 97204  
Email  
Phone 503-987-6543  
**Insurance Numbers**  
X12 Partners Email  
Phone 503-987-6544  
**Documents**  
Edit Categories Default Method Print

HL7 Viewer

Active Patient: None  
Active Encounter: None  
Popups

Find:   
by:  Name  ID  
 SSN  DOB

[Logout](#)

Done

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 'Add New Partner'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies X12 Partner  
Add a Pharmacy Partner Name Zirmed

Insurance Companies ID Number (ETIN) 12345  
Add a Company Receiver ID 23456

Insurance Numbers X12 Partners Sender ID 34567

Documents Version 004010X098A1  
Edit Categories Processing Format standard

Add

HL7 Viewer

Active Patient: None

Active Encounter: None

Popups

Find:  by: Name ID SSH DOB

Logout Done

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 'Add' to save the information you've entered.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top  Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies Name City, State Default X12 Partner  
Add a Pharmacy MedOne South San Fransisco CA Zirmed

Insurance Companies Name City, State Default X12 Partner  
Add a Company Pacific Health Pasadena CA Zirmed

Insurance Numbers X12 Partners

Documents Edit Categories

HL7 Viewer

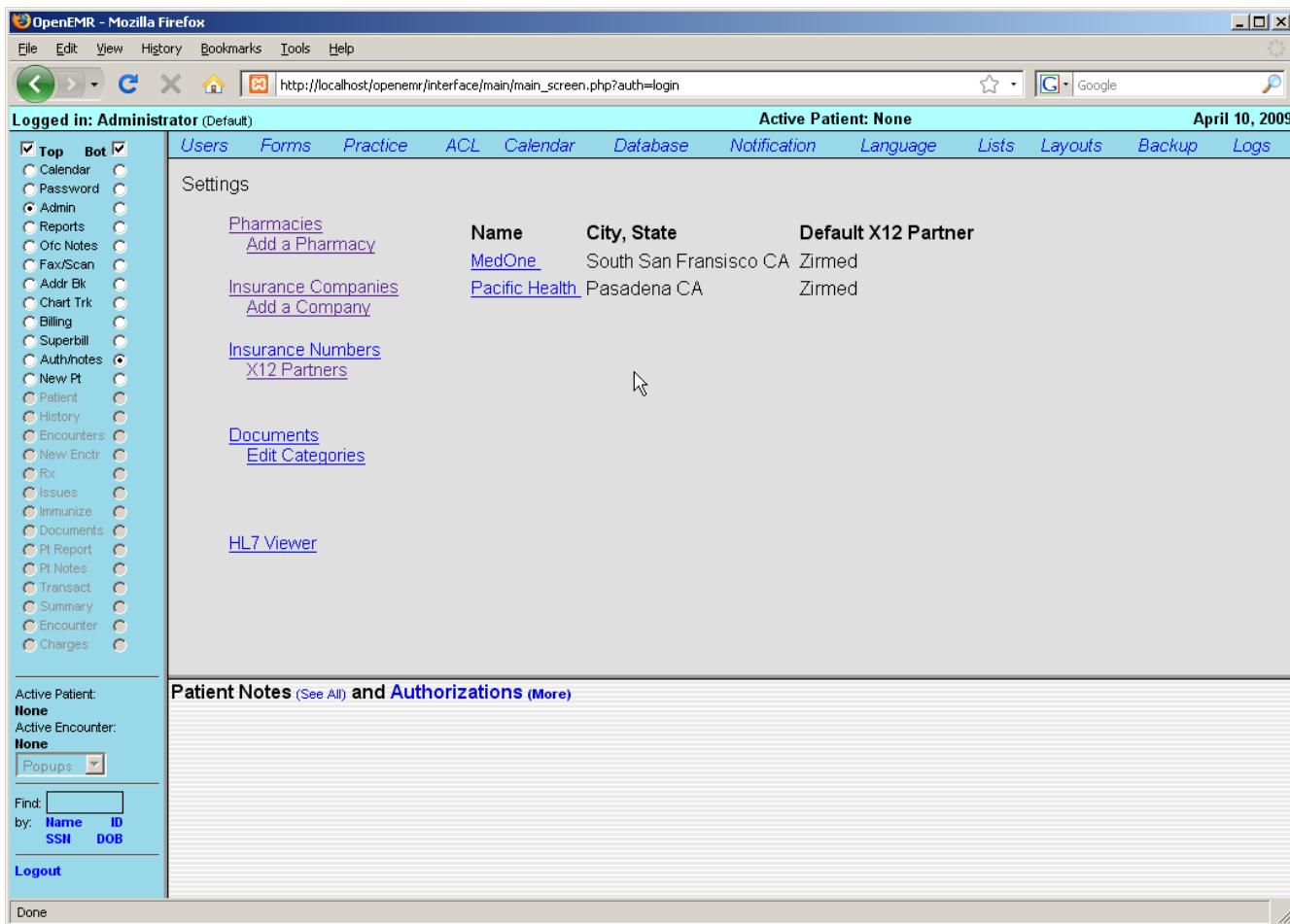
Active Patient: None

Active Encounter: None

Popups

Find:   
by:  Name  ID  
 SSN  DOB

Logout Done



Selecting 'Insurance Companies' from the links to the left 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default)      Active Patient: None      April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

**Pharmacies**  
Add a Pharmacy

Name: MedOne  
Attn:  
Address: 123 Comercial Ave  
Address:  
City, State Zip: South San Fransisco, CA 54080

**Insurance Companies**  
Add a Company

**Insurance Numbers**  
X12 Partners

CMS ID: 12345  
Phone: 650-444-1234  
Payer Type: Commercial Insurance Co.  
Default X12 Partner: Zirmed

**Documents**  
Edit Categories

**HL7 Viewer**

Update

Active Patient: None  
Active Encounter: None  
Popups

Find:   
by: Name ID  
SSN DOB

Logout Done

Patient Notes (See All) and Authorizations (More)

Once you have entered the correct information, click 'Update' 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Active Patient: None      April 10, 2009

Logged in: Administrator (Default)

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies

Add a Pharmacy

Name Provider # Rendering # Group #

Administrator Default 22334 01234

Insurance Companies

Add a Company

Betty Black Default

Gary Green Default

Insurance Numbers

X12 Partners

Documents

Edit Categories

HL7 Viewer

Active Patient: None

Active Encounter: None

Popups

Find:  by: Name ID SSH DOB

Logout Done

The screenshot shows the OpenEMR interface in Mozilla Firefox. The top navigation bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL http://localhost/openemr/interface/main/main\_screen.php?auth=login. The main content area has tabs for Active Patient: None and the date April 10, 2009. On the left, a sidebar lists various administrative functions like Users, Forms, Practice, etc., with some items checked. The main panel contains sections for Settings, Pharmacies, Insurance Companies, and Documents. A 'Patient Notes' section is also visible. At the bottom, there are search fields for 'Find' and 'by' (Name, ID, SSH, DOB), a 'Logout' button, and a 'Done' button.

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 'Add' button to save. 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies Provider Administrator  
Add a Pharmacy MedOne Provider # 22334

Insurance Companies Rendering Provider #  
Add a Company Group # 01234

Add New...

Insurance Numbers X12 Partners

Documents Provider Number Insurance Company Default Type:  
Edit Categories Unspecified

Rendering Provider Number Type:  
Unspecified

HL7 Viewer Group Number

Update

Patient Notes (See All) and Authorizations (More)

Active Patient: None

Active Encounter: None

Popups

Find:  by: Name ID SSH DOB

Logout Done

The screenshot shows the OpenEMR interface. At the top, there's a navigation bar with links like File, Edit, View, History, Bookmarks, Tools, and Help. Below that is a toolbar with icons for Back, Forward, Stop, Home, and Search, along with a link to Google. The main content area has tabs for Users, Forms, Practice, ACL, Calendar, Database, Notification, Language, Lists, Layouts, Backup, and Logs. On the left, there's a sidebar with a 'Top Bot' toggle and a list of various medical records modules. The central part of the screen is titled 'Settings' and contains fields for Provider (MedOne), Insurance Company (Default), and Document Types (Unspecified). Below this is a section for 'Patient Notes' and 'Authorizations'. A sidebar on the left includes a 'Popups' dropdown, a search bar, and links for Logout and Done.

Next click on 'Edit Categories'. This 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 name, fill in the name of the new document type, and click 'Add Category'

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies Add a Pharmacy

Insurance Companies Add a Company

Insurance Numbers X12 Partners

Documents Edit Categories

HL7 Viewer

Patient Notes (See All) and Authorizations (More)

Active Patient: None

Active Encounter: None

Popups

Find: Name ID  
by: SSH DOB

Logout Done

The new category will be a sub-category of Patient Information

Category Name: Insurance Card Add Category

Categories D

- Lab Report D
- Medical Record D
- Patient Information D
- Patient ID card D

## Lists

Select 'Lists' from the menu at the top of the Admin page. 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Edit list: Language Delete this List New List

ID	Title	Order	Default
English	English	1	<input checked="" type="checkbox"/>
Spanish	Spanish	2	<input type="checkbox"/>
			<input type="checkbox"/>

Save

Boolean  
Chart Storage Locations  
Country  
Drug Forms  
Drug Units  
Drug Routes  
Drug Intervals  
Exams/Tests  
Fee Sheet  
Language  
Marital Status  
Price Level  
Race/Ethnicity  
Referral Source  
Risk Factors  
Risk Level  
Service Category  
Sex  
State  
Tax Rate

Patient Notes (See All) and Authorizations (More)

Active Patient:  
**None**  
Active Encounter:  
**None**  
Popups

Find:   
by: Name ID  
SSN DOB

Logout Done

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Edit list: State Delete this List New List

ID	Title	Order	Default
CA	California	1	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Save

Patient Notes (See All) and Authorizations (More)

Active Patient:  
None  
Active Encounter:  
None  
Popups

Find: by: Name ID  
SSN DOB

Logout Done

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Edit list: State Delete this List New List

ID	Title	Order	Default
CA	California	1	<input type="checkbox"/>
OR	Oregon	2	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Save

Patient Notes (See All) and Authorizations (More)

Active Patient:  
None  
Active Encounter:  
None  
Popups

Find:   
by: Name ID  
SSN DOB

Logout Done

The screenshot shows the OpenEMR web application's main interface. On the left, there's a sidebar with various links like 'Calendar', 'Reports', and 'Billing'. Below that is a section for 'Active Patient' and 'Active Encounter', both currently set to 'None'. There's also a 'Popups' dropdown and a search bar for 'Find' with options 'Name', 'ID', 'SSN', and 'DOB'. At the bottom of the sidebar are 'Logout' and 'Done' buttons. The main content area is titled 'Edit list' and is set to 'State'. It shows a table with columns 'ID', 'Title', 'Order', and 'Default'. Two rows are present: 'CA' (California) with Order 1 and 'Default' unchecked, and 'OR' (Oregon) with Order 2 and 'Default' checked. A 'Save' button is at the bottom of the table. Below the table, there's a section for 'Patient Notes' and 'Authorizations'. The top right corner shows the date 'May 12, 2009'.

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Edit list: Race/Ethnicity Delete this List New List

ID	Title	Order	Default
Caucasian	Caucasian	1	<input type="checkbox"/>
Asian	Asian	2	<input type="checkbox"/>
Black	Black	3	<input type="checkbox"/>
Hispanic	Hispanic	4	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Save

Patient Notes (See All) and Authorizations (More)

Active Patient:  
None  
Active Encounter:  
None  
Popups

Find:   
by: Name ID  
SSN DOB

Logout Done

## 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' from the navigation menu to bring up your clinic's Address Book.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top  Bot

First Name: [ ] Last Name: [ ] Specialty: [ ] Search Add New

Name	Local	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Administrator,	*									
Black, Betty	*									

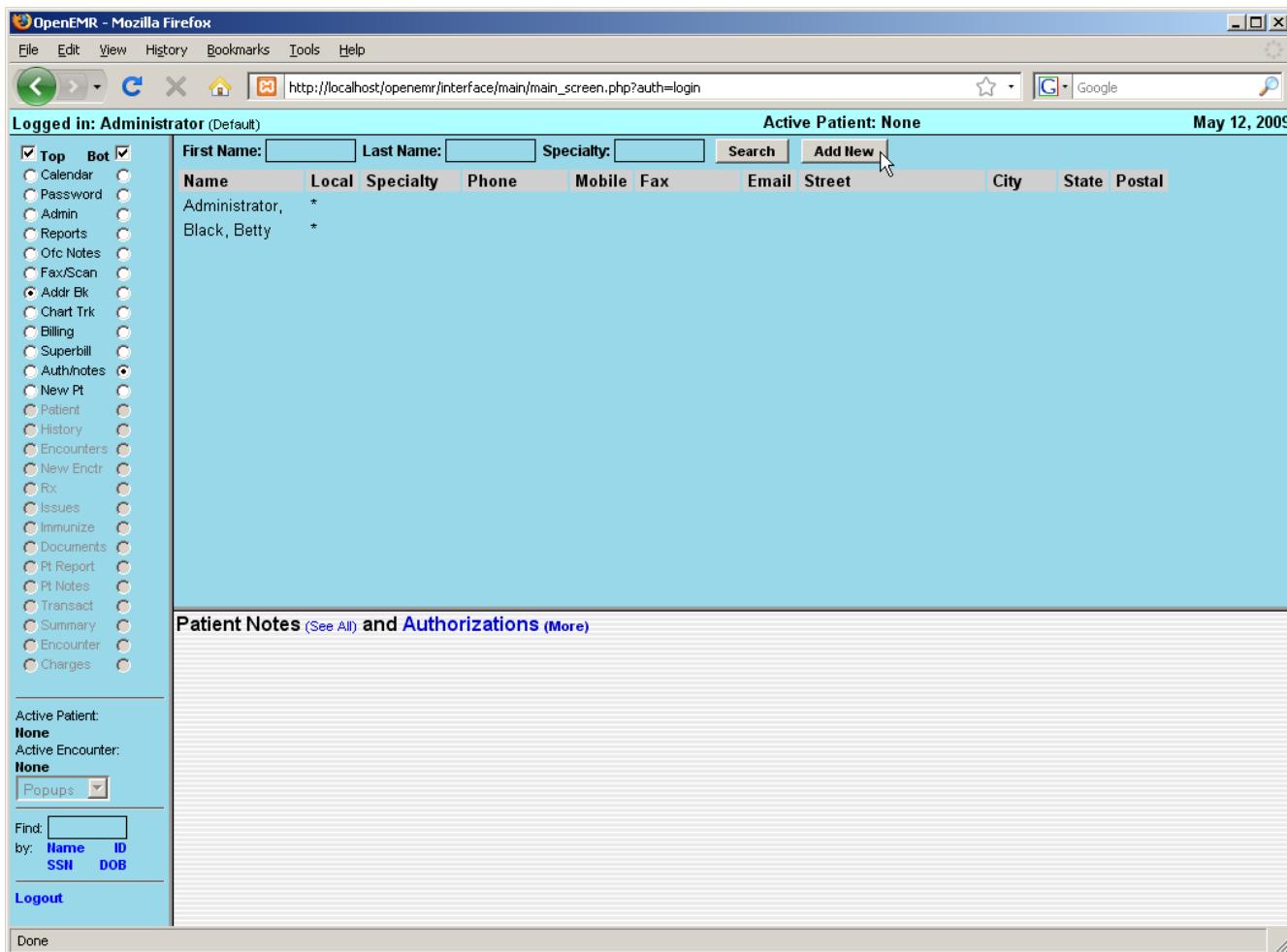
New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: **None**  
Active Encounter: **None**  
Popups

Find: [ ]  
by: **Name** **ID**  
**SSN** **DOB**

[Logout](#) Done

Patient Notes ([See All](#)) and Authorizations ([More](#))



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

Add New Person - Mozilla Firefox

http://localhost/openemr/interface/usergroup/addrbook\_edit.php?userid=0

Name: Dr. Last: Orange First: Ophelia Middle:

Specialty: Dermatology

Organization: Universal Health Center

Valedictory:

Home Phone:  Mobile:

Work Phone: 503-222-3344 2nd:  Fax: 503-222-3345

Assistant:

Email:

Website:

Main Address: 4456 SE Washington St.

City: Portland State/county: OR Postal code: 97215

Alt Address:

City:  State/county:  Postal code:

UPIN: U78901 NPI:  TIN:  Taxonomy: 207Q00000X

Notes:

Done

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.

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

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top  Bot

First Name:  Last Name:  Specialty:

Name	Local	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Administrator, *										
Black, Betty *										
Orange, Ophelia		Dermatology	503-222-3344		503-222-3345		4456 SE Washington St.	Portland	OR	97215

Patient Notes ([See All](#)) and Authorizations ([More](#))

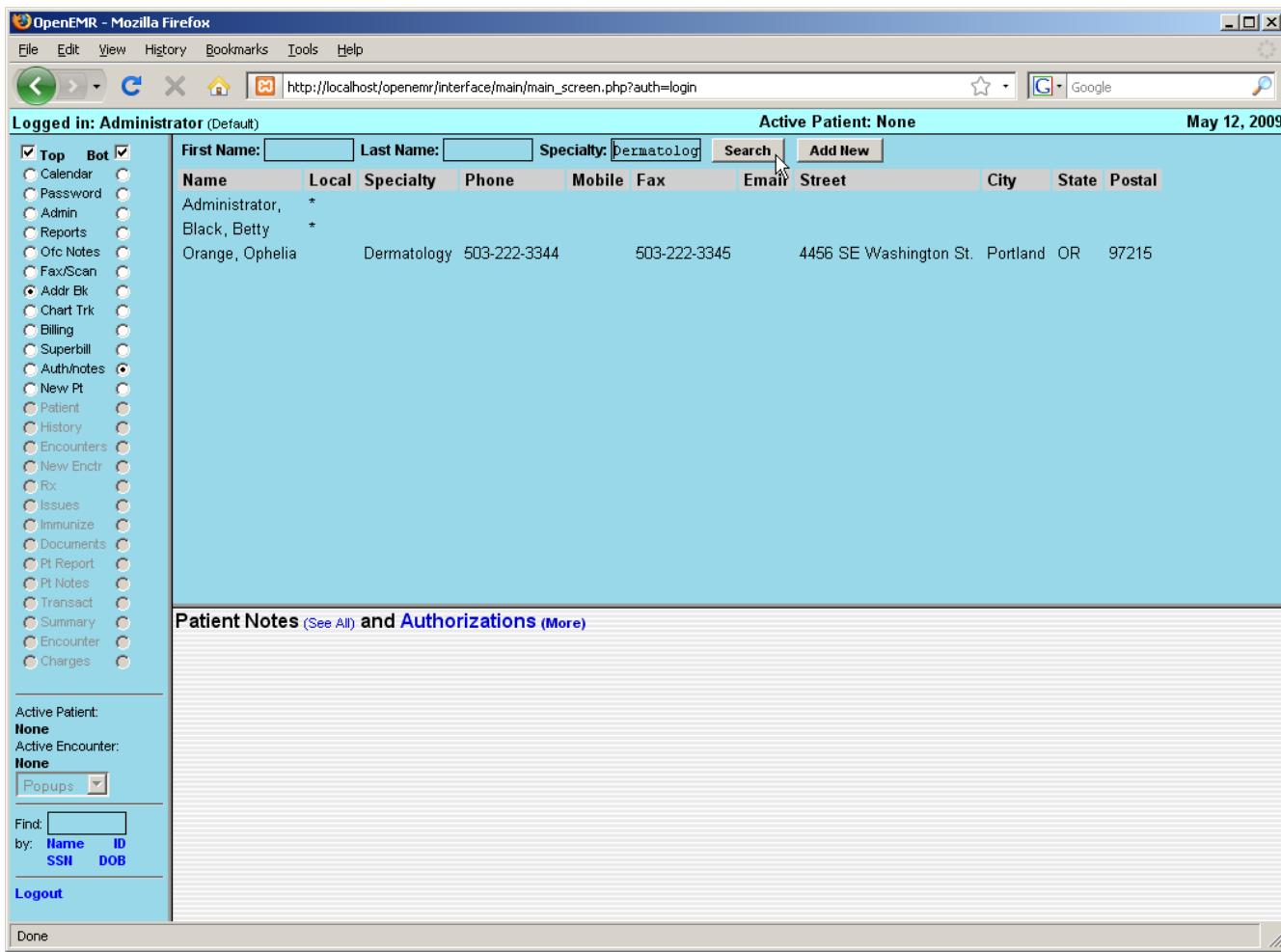
Active Patient:  
**None**

Active Encounter:  
**None**

Find:   
by: [Name](#) [ID](#)  
[SSN](#) [DOB](#)

[Logout](#)

[Done](#)

A screenshot of the OpenEMR web application in Mozilla Firefox. The main content area shows a search result for a patient contact named Black, Betty. The contact information listed is: Name: Black, Betty, Specialty: Dermatology, Phone: 503-222-3344, Mobile: 503-222-3345, Street: 4456 SE Washington St., City: Portland, State: OR, Postal: 97215. Above the contact list, there is a search bar with fields for First Name, Last Name, and Specialty, and a 'Search' button. To the left of the main content area, there is a sidebar with a list of links for various medical records and a section for active patient and encounter status. At the bottom left, there are buttons for finding patients by name, ID, SSN, or DOB, and a 'Logout' button.

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

You can search for a particular contact in the address book by enter 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

First Name:  Last Name:  Specialty:  Search Add New

Name	Local	Specialty	Phone	Mobile	Fax	Email	Street	City	State	Postal
Orange, Ophelia		Dermatology	503-222-3344		503-222-3345		4456 SE Washington St.	Portland	OR	97215

Patient Notes ([See All](#)) and Authorizations ([More](#))

Active Patient: **None**  
Active Encounter: **None**

Find:   
by:  Name  ID  
 SSN  DOB

[Logout](#)

## Adding A New Patient

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

Click 'New Pt.' in the navigation menu on the left of the screen to begin entering a new patient into the system.

### Patient Demographics

Enter the patient's name & birth date. If you have an existing chart for this patient, you may enter the chart number in here. 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'.

The screenshot shows the 'Add Patient Record' page in the OpenEMR web application. On the left, there is a vertical navigation menu with various links like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, PT Report, PT Notes, Transact, Summary, Encounter, and Charges. Below this menu, there are fields for Active Patient (None) and Active Encounter (None). A 'Popups' checkbox is checked. At the bottom, there is a 'Find' field with dropdown menus for Name, ID, SSN, and DOB, and a 'Done' button.

**Add Patient Record**

Active Patient: None      April 10, 2009

Title: Mr.      First Name: Rod  
Middle Name:      Last Name: Roark  
Sex: Male      Birth Date: 2009-04-14  
Patient Number: [ ] omit to autoassign

**Create**

**Patient Notes** (See All) and **Authorizations** (More)

You should now be presented with the patient Demographics page, which contains a summary of the patient's identifying information, including employment, insurance and provider information.

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

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default)      Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month      April 10, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics** ([More](#)) ([Delete](#))

**Who**

Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.:  
Marital Status:  
User Defined:

**Contact**

Address: City:  
State: Postal Code:  
Country: Emergency Contact:  
Work Phone: Home Phone:  
Contact Email: Mobile Phone:

**Choices**

Provider:  
Pharmacy:  
HIPAA Notice Received:  
Allow Mail Message:  
Allow Email: NO  
Occupation:  
Employer Address:  
State: City:  
Country: Postal Code:

**Employer**

Language:  
Financial Review Date: 0000-00-00 00:00:00  
Monthly Income:  
Interpreter:

**Stats**

Allow Voice Message:  
Allow SMS: NO  
Leave Message With:  
Employer Name:  
Race/Ethnicity:  
Family Size:  
Homeless, etc.:  
Migrant/Seasonal:

**Patient Notes** ([See All](#)) and **Authorizations** ([More](#))

Find:   
by:  Name  ID  SSH  DOB

[Logout](#)

Done

To continue entering patient information click 'Demographics (more)' at the top of the page.

This will bring up a series of expandable sections containing inputs for the various types of patient data. Click the checkbox next to the section or sections you would like to work with. Fill in the desired fields. Note that fields labeled in red are required in order for billing to work properly.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top  Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Blk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Encr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

**Demographics** ([Back](#))

Who

Name:	Mr.	Rod		Roark	External ID:	1
DOB:	1985-08-06				Sex:	Male
S.S.:	111-22-3333	August, 1985			License/ID:	1234567
Marital Status:	Married					
User Defined:						

Contact  
 Choices  
 Employer  
 Stats  
 Insurance

wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
30					1	2	3
31	4	5	6	7	8	9	10
32	11	12	13	14	15	16	17
33	18	19	20	21	22	23	24
34	25	26	27	28	29	30	31

Tue, Aug 6

[\[Save Patient Demographics\]](#)

Active Patient:  
Rod Roark (1)  
Active Encounter:  
None  
[Popups](#)

Find:   
by:  Name  ID  
 SSN  DOB

[Logout](#)

Patient Notes ([See All](#)) and Authorizations ([More](#))

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)

Continue entering data as necessary.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics** (Back)

Who  Contact

Address: 321 SW Capitol Hwy City: Portland  
State: Unassigned Postal Code: 97219  
Country: USA Emergency Contact: Wife  
Emergency Phone: 971-222-3333 Home Phone: 503-456-7890  
Work Phone: 503-112-3334 Mobile Phone: 971-564-7896  
Contact Email: mr.rod@gmail.com

Choices

Provider: Betty Black Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland  
HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife

Employer  Stats  Insurance

[Save Patient Demographics]

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find:   
by: Name ID SSH DOB

Logout Done

The last section in the Demographics area is the Insurance section.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top  Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Blk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

**Demographics** (Back)

Who  
 Contact  
 Choices  
 Employer  
 Stats  
 Insurance

**Primary Insurance Provider:** Pacific Health

Plan Name:	PH 7.0	Subscriber:	Rod	Roark
Effective Date:	0000-00-00	Relationship:	Self	(Browse)
Policy Number:	1122334	D.O.B.:	2009-04-14	S.S.: 111-22-3333
Group Number:	1234	Male		Sex:
Subscriber Employer (SE) (if unemployed enter Student, PT Student, or leave blank):		Subscriber Address: 321 SW Capitol Hwy		
		City: Portland	State: OR	
SE Address:	44566 Industry Way			
SE City:	Portland	SE State:	OR	
SE Zip Code:	97002	SE Country:	USA	
<b>Secondary Insurance Provider:</b> Unassigned <input type="button" value="Search/Add Insurer"/>				
Plan Name:	<input type="text"/>			
Effective Date:	0000-00-00			
Policy Number:	<input type="text"/>			
<b>Patient Notes</b> ( <a href="#">See All</a> ) and <b>Authorizations</b> ( <a href="#">More</a> )				

Active Patient:  
Rod Roark (1)  
Active Encounter:  
None

Find:   
by:  Name  ID  
 SSH  DOB

Select the patient's insurance company from the drop-down list, or you can search for it by clicking 'Search/Add Insurer'. 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.

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

Insurance Company Search/Add - Mozilla Firefox

http://localhost/openemr/interface/practice/ins\_search.php

Name: Pacific

Attention:

Address1:

Address2:

City/State: Pasadena CA

Zip/Country: USA

Phone:

CMS ID:

Payer Type: Commercial Insurance Co.

X12 Partner: Zirmed

Search Save as New Cancel

List Insurance Companies - Mozilla Firefox

http://localhost/openemr/interface/practice/ins\_list.php?form\_name=Pacific&form\_attn=&form\_addr1=&form\_addr2=&form\_city=Pasadena&form\_

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

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 the 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 Patient Demographics' at the bottom of the page to save and return to the Demographics summary. You can see that all of the new patient data is now visible on the summary page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Demographics (More) (Delete)	
<b>Who</b>	Name: Mr. Rod Roark DOB: 1985-08-06 S.S.: 111-22-3333 Marital Status: Married User Defined:
<b>Contact</b>	External ID: 1 Sex: Male License/ID: 1234567 Address: 321 SW Capitol Hwy State: City: Portland Country: USA Postal Code: 97219 Emergency Phone: 971-222-3333 Emergency Contact: Wife Work Phone: 503-112-3334 Home Phone: 503-456-7890 Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896 Provider: Betty Black
<b>Choices</b>	HIPAA Notice Received: YES Allow Voice Message: YES Allow Mail Message: NO Allow SMS: NO Allow Email: YES Leave Message With: wife Occupation: Engineer Employer Name: NW Company Employer Address: 44566 Industry Way City: Portland State: OR Postal Code: 97002 Country: USA
<b>Employer</b>	Language: English Race/Ethnicity: Caucasian Financial Review Date: 0000-00-00 00:00:00 Family Size: Monthly Income: Homeless, etc.: Interpreter: Migrant/Seasonal:
<b>Stats</b>	
<b>Patient Notes</b> (See All) and <b>Authorizations</b> (More)	

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find:   
by:  Name  ID  
 SSN  DOB

Logout Done

## Patient History

Next select 'History' from the navigation menu on the left side of the screen. This brings up a summary page containing information about the patient's medical history.

Clicking on 'Patient History / Lifestyle (more)' will bring up a data entry page with expanding sections, similar to that of the Demographics page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top  Bot  Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Authnotes  New Pt  Patient  History  Encounters  New Enct  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Patient History / Lifestyle** (Back)

General

Risk Factors:	Exams/Tests:	N/A Nor Abn Date/Notes
<input type="checkbox"/> Varicose Veins	Breast Exam	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Hypertension	Cardiac Echo	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Diabetes	ECG	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Sickle Cell	Gynecological Exam	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Fibroids	Mammogram	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> PID (Pelvic Inflammatory Disease)	Physical Exam	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Severe Migraine	Prostate Exam	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/>
<input type="checkbox"/> Heart Disease	Rectal Exam	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Thrombosis/Stroke	Sigmoid/Colonoscopy	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Hepatitis	Retinal Exam	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Gall Bladder Condition	Flu Vaccination	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Breast Disease	Pneumonia Vaccination	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Depression	LDL	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Allergies	Hemoglobin	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Infertility	PSA	<input type="radio"/> <input type="radio"/> <input type="radio"/>
<input type="checkbox"/> Asthma		
<input type="checkbox"/> Epilepsy		
<input type="checkbox"/> Contact Lenses		
<input type="checkbox"/> Contraceptive Complication (specify)		
<input type="checkbox"/> Other (specify)		

Family History  
 Relatives  
 Lifestyle

Patient Notes ([See All](#)) and Authorizations ([More](#))

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top  Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- FaxScan
- Addr Blk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Encr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Patient History / Lifestyle (Back)

General  Family History

Father:	B4 good health	Mother:	deceased 45
Siblings:		Spouse:	
Offspring:			

Relatives

Cancer:	paternal aunt	Tuberculosis:	
Diabetes:	mother	High Blood Pressure:	mother
Heart Problems:	maternal grandfather	Stroke:	
Epilepsy:		Mental Illness:	
Suicide:			

Lifestyle  Other

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find:   
by:  Name  ID  
 SSH  DOB

[Logout](#)

Patient Notes ([See All](#)) and Authorizations ([More](#))

Done

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

## Uploading Documents

Select 'Documents' from the navigation menu on the left. Here you may upload files that you have scanned and/or saved, such as a patient's ID or insurance card.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main content area is titled "Logged in: Administrator (Default)" and "Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009". On the left, a sidebar lists various menu items with checkboxes. The "Documents" item is checked. The main panel shows a tree view of document categories: "Categories" (Lab Report, Medical Record), "Patient Information" (Insurance Card, Patient ID card). A note states: "NOTE: Uploading files with duplicate names will cause the files to be automatically renamed. For example 'file.jpg' will become 'file.jpg.1'. Filenames are considered unique per patient, not per category." Below this, it says "Upload Document to category 'Insurance Card'". A file input field contains "J:\MI2\insurance\_card.jpg" and a "Browse..." button. An "Upload" button is below. At the bottom, there are links for "Patient Notes (See All) and Authorizations (More)". The sidebar also shows the active patient as "Rod Roark (1)" and the active encounter as "None".

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

Document Categories

Categories

- Lab Report
- Medical Record
- Patient Information
  - Insurance Card
  - Patient ID card

NOTE: Uploading files with duplicate names will cause the files to be automatically renamed. For example 'file.jpg' will become 'file.jpg.1'. Filenames are considered unique per patient, not per category.

Upload Document to category 'Insurance Card'

Upload Report

File insurance\_card.jpg successfully stored.

ID: 15  
Patient: 1  
URL: file:///C:/xampphtdocsopenemr/documents/1/insurance\_card.jpg  
Size: 25985  
Date: 2009-04-10 16:33:08   
MimeType: image/jpeg  
Revision: 2009-04-10 16:33:08

Active Patient:  
**Rod Roark (1)**  
Active Encounter:  
**None**  
Popups

Find:   
by:  Name  ID  
 SSN  DOB

Done

Patient Notes [\(See All\)](#) and [Authorizations \(More\)](#)

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 arrow 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

Document Categories

Categories

- Lab Report
- Medical Record
- Patient Information
  - Insurance Card
    - 2009-04-10 insurance\_card.jpg
  - Patient ID card

INSURANCE COMPANY NAME  COVERAGE TYPE

MEMBER NAME: JOHN DOE MEMBER NUMBER: XXX-XX-XXXX EFFECTIVE DATE: XX-XX-XXXX

GROUP #: XXXXX-XXX-XXX PRESCRIPTION GROUP #: XXXXX

PCP CO-PAY: \$15.00 PRESCRIPTION CO-PAY:  
SPECIALIST CO-PAY: \$25.00 \$15 GENERIC  
EMER. ROOM CO-PAY: \$75.00 \$20 NAME BRAND

MEMBER SERVICES: 1-800-XXX-XXXX CLAIMS/INQUIRIES: 1-800-XXX-XXXX

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

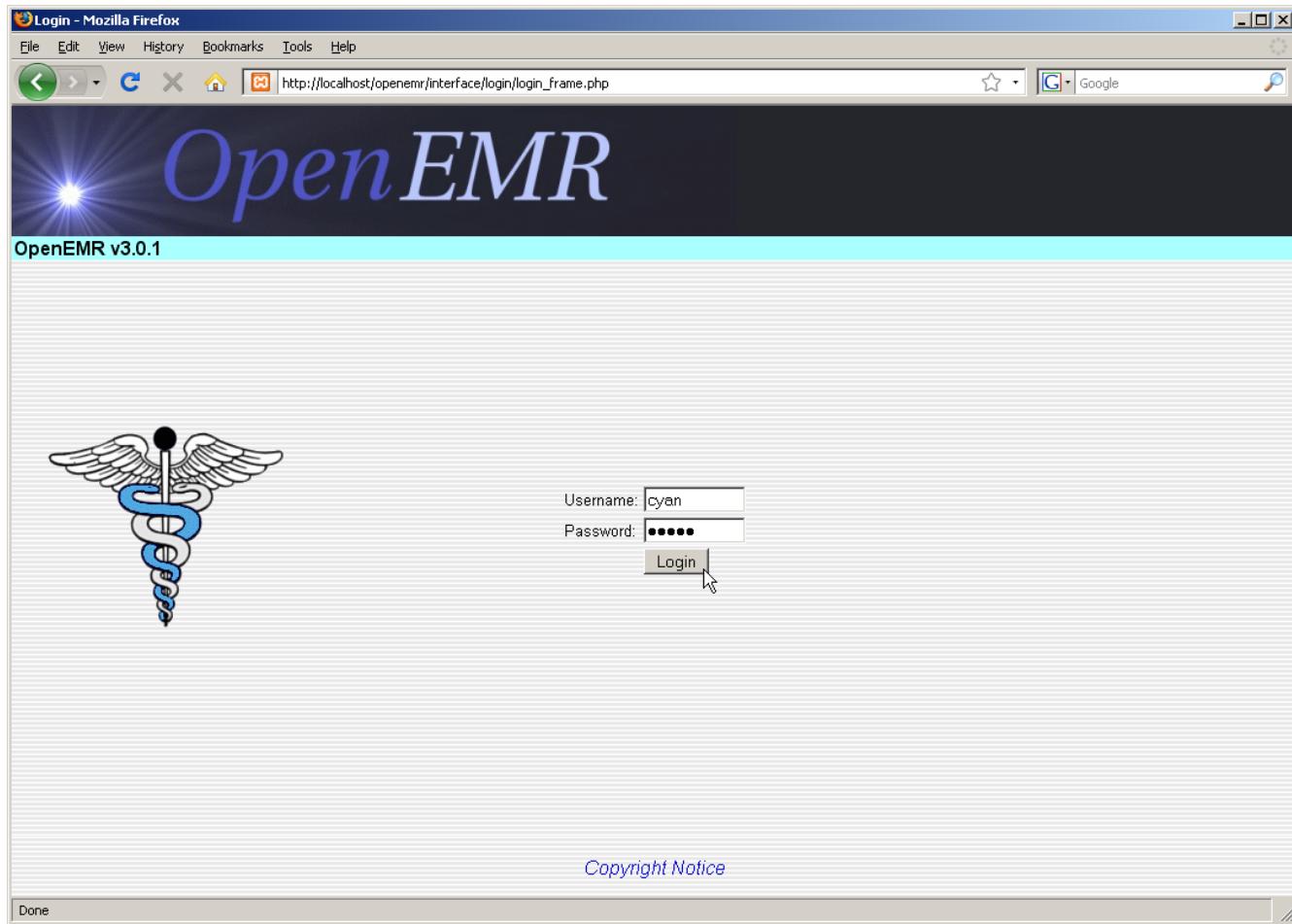
Find:   
by: Name ID SSH DOB

Logout

http://localhost/openemr/controller.php?document&view&patient\_id=1&doc\_id=15&

## Using The Calendar

In this section we'll discuss setting up a doctor'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, click on “8:00” under the Name of the doctor who's schedule you wish to set up.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default)

Active Patient: None April 10, 2009

Top Bot

All Users 2009-04-10 Day View Go Today Add Search

Administrator Betty Black All Facilities << Friday, April 10, 2009 >>

Administrator	B Black	G Green
8:00	8:00	8:00
9:30 IN		
9:45		
10:00		
10:15		
10:30		
10:45		
11:00		
11:15		
11:30		
11:45		
12:00		
12:15		
12:30		
12:45		

Patient Notes (See All)

Active Patient: None

Active Encounter: None

Popups

Find: by: Name ID SSN DOB

Logout

Done

This screenshot shows the OpenEMR calendar interface. The top navigation bar includes links for File, Edit, View, History, Bookmarks, Tools, and Help. The main title is "Active Patient: None" followed by the date "April 10, 2009". On the left, there's a sidebar with a list of medical functions like Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Below the sidebar are buttons for "Popups", "Find" (with fields for Name, ID, SSN, DOB), and "Logout". The main area displays a weekly calendar grid from Monday to Sunday. The "Administrator" column shows a list of times from 8:00 to 12:45. The "B Black" column has a red background and contains the text "IN" at 9:30 AM. The "G Green" column also has a red background. A cursor is visible over the "B Black" column. At the bottom, there's a section for "Patient Notes" with a link "(See All)".

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

Add New Event - Mozilla Firefox

http://localhost/openemr/interface/main/calendar/add\_edit\_event.php?startampm=18starttimeh=8

Category:	In Office	<input type="radio"/> All day event
Date:	2009-04-10	<input checked="" type="radio"/> Time 8 : 30 AM
Title:	In Office	duration 0 minutes
Facility:	Your Clinic Name Here	
Patient:	Click to select	
Provider:	Black, Betty	<input checked="" type="checkbox"/> Repeats every workday
Pref Cat:	-None-	until 2010-04-10
Comments:		
<input type="button" value="Save"/> <input type="button" value="Find Available"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>		

Done

This screenshot shows the "Add New Event" dialog box. It's a form with various input fields and controls. The "Category" field is set to "In Office". The "Date" field shows "2009-04-10". The "Title" field is "In Office". The "Facility" field is "Your Clinic Name Here". The "Patient" field is "Click to select". The "Provider" field is "Black, Betty". The "Pref Cat" field is "-None-". There are two radio buttons: one for "All day event" and one for "Time" (set to 8 : 30 AM). A checkbox for "Repeats" is checked, with options "every" and "workday" selected, and a date range from "until 2010-04-10". At the bottom, there are four buttons: "Save", "Find Available", "Delete", and "Cancel". A cursor is over the "Save" button. The overall background of the dialog is light blue.

The clinic and provider name should be automatically filled in for you. Set the time at which the doctor arrives by filling in the appropriate time on the right, and choosing "In Office" from the 'Category' drop-down list.

You can also choose to make this a repeating event, which allows you to only have to set up an event 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 list of available time slots for that doctor's schedule. Scroll down and click on the time that doctor is scheduled to leave the office for the day.

**Add New Event - Mozilla Firefox**

http://localhost/openemr/interface/main/calendar/add\_edit\_event.php?startampm=2&starttimeh=1

<b>Category:</b> Out Of Office	<input type="radio"/> All day event
<b>Date:</b> 2009-04-10	<input type="radio"/> Time 5 : 00 PM
<b>Title:</b> Out Of Office	duration 0 minutes
<b>Facility:</b> Your Clinic Name Here	
<b>Patient:</b> Click to select	
<b>Provider:</b> Black, Betty	<input checked="" type="checkbox"/> Repeats every workday
<b>Status:</b>	until 2010-04-10
<b>Comments:</b>	
<b>Save</b> <b>Find Available</b> <b>Delete</b> <b>Cancel</b>	

Done

Now the time is automatically selected, as well as the provider and facility information. The same process is used to create a repeating "Out Of Office" event.

**Add New Event - Mozilla Firefox**

http://localhost/openemr/interface/main/calendar/add\_edit\_event.php?startampm=2&starttimeh=1

<b>Category:</b> Lunch	<input type="radio"/> All day event
<b>Date:</b> 2009-04-10	<input type="radio"/> Time 12 : 00 PM
<b>Title:</b> Lunch	duration 60 minutes
<b>Facility:</b> Your Clinic Name Here	
<b>Patient:</b> Click to select	
<b>Provider:</b> Black, Betty	<input checked="" type="checkbox"/> Repeats every workday
<b>Status:</b>	until 2010-04-10
<b>Comments:</b>	
<b>Save</b> <b>Find Available</b> <b>Delete</b> <b>Cancel</b>	

Done

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default)

Active Patient: None April 10, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transect  Summary  Encounter  Charges

Administrator	B Black	G Green
8:00	8:00	8:00
	8:30 IN	
	8:45	
	9:00	
	9:15	
9:30 IN	9:30	
9:45	9:45	
10:00	10:00	
10:15	10:15	
10:30	10:30	
10:45	10:45	
11:00	11:00	
11:15	11:15	
11:30	11:30	
11:45	11:45	
12:00	12:00 LUNCH	
12:15		
12:30		

Active Patient: None

Active Encounter: None

Popups

Find:   
by: Name ID  
SSN DOB

Logout

Done

Patient Notes ([See All](#))

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: None April 10, 2009

Top Bot All Users 2009-04-10 Day View Go Today Add Search

Administrator Betty Black All Facilities <> Friday, April 10, 2009 >>

Administrator	B Black	G Green
8:00	8:00	8:00 IN
		8:15
	8:30 IN	8:30
	8:45	8:45
	9:00	9:00
	9:15	9:15
9:30 IN	9:30	9:30
9:45	9:45	9:45
10:00	10:00	10:00
10:15	10:15	10:15
10:30	10:30	10:30
10:45	10:45	10:45
11:00	11:00	11:00 LUNCH
11:15	11:15	
11:30	11:30	

Active Patient: None  
Active Encounter: None  
Popups

Find:   
by: Name ID  
SSN DOB

Logout

Done

## 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").

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: None April 10, 2009

Top  Bot

[Help] Showing 1 of 1 records found.

Name	Phone	SS	DOB	ID	PID	[Number Of Encounters]	[Days Since Last Encounter]	[Date of Last Encounter]	[90 Days From Last Encounter]
Roark, Rod	503-456-7890	111-22-3333	08/06/1985	1	1	0			

Active Patient: None  
Active Encounter: None  
Popups

Find: roark  
by: Name ID  
SSN DOB

Logout

Done

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 Pt.' from the menu to begin entering their information.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 10, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Add Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
**External ID:** 1  
**Sex:** Male  
**License/ID:** 1234567  
**Balance Due:** \$0.00  
**Upcoming Appointments**  
**New Appointment**

**Contact** Marital Status: Married  
**User Defined:**  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
**Emergency Contact:** Wife  
Home Phone: 503-456-7890  
Mobile Phone: 971-564-7896

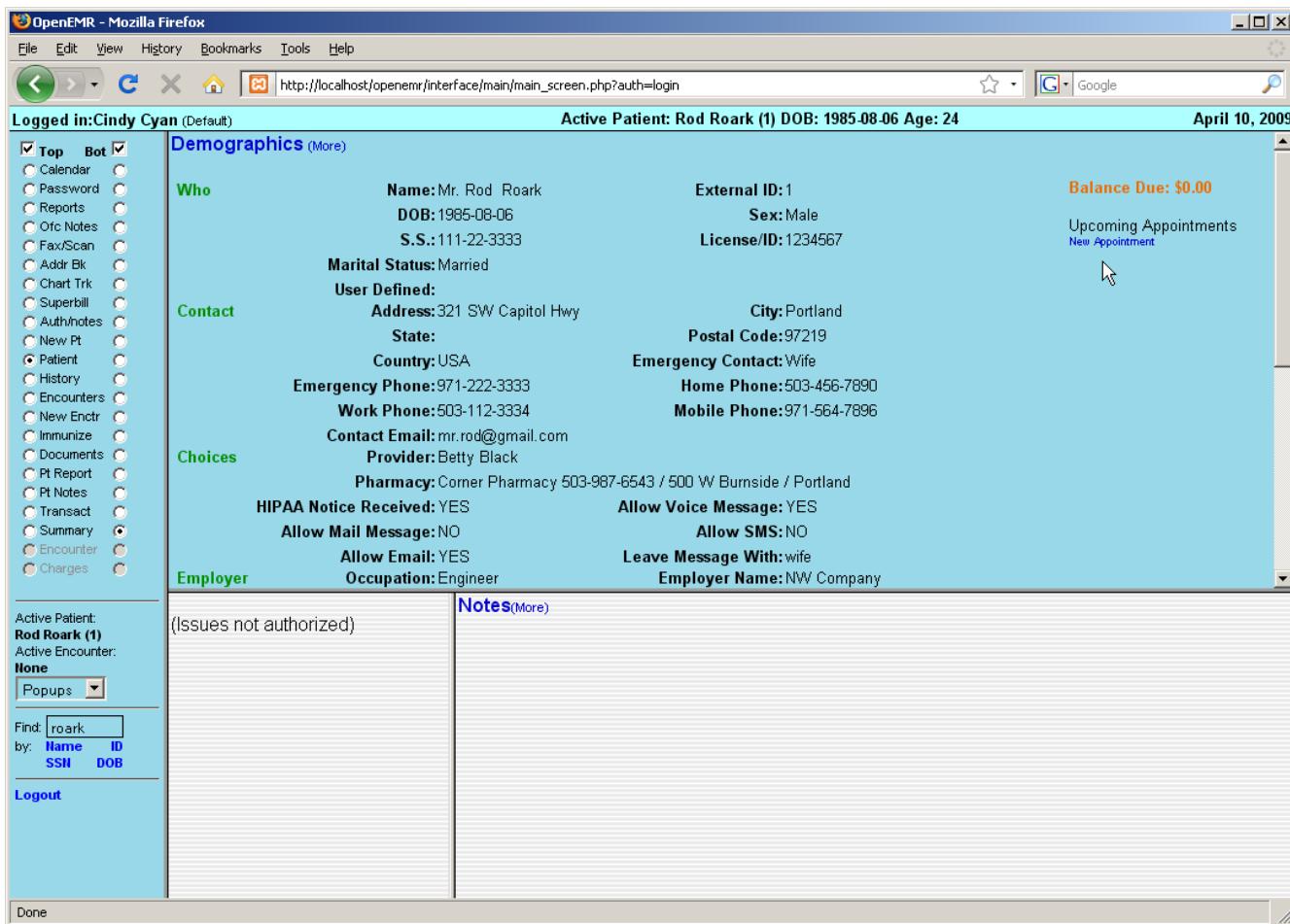
**Choices** Emergency Phone: 971-222-3333  
Work Phone: 503-112-3334  
Contact Email: mr.rod@gmail.com  
Provider: Betty Black  
**HIPAA Notice Received:** YES  
**Allow Voice Message:** YES  
**Allow Mail Message:** NO  
**Allow Email:** YES  
**Employer** Occupation: Engineer  
**Notes (More)**  
(Issues not authorized)

Active Patient:  
**Rod Roark (1)**  
Active Encounter:  
**None**  
Popups

Find: roark  
by: Name ID  
SSN DOB

Logout

Done



The right-hand side of the Demographics summary shows a list of all current and future appointments for that patient. Click 'New Appointment' to schedule an office visit.

Add New Event - Mozilla Firefox

http://localhost/openemr/interface/main/calendar/add\_edit\_event.php?patientid=1

**Category:** Office Visit

All day event  Time  :  PM

**Date:** 2009-04-10

**Title:** Office Visit duration  minutes

**Facility:** Your Clinic Name Here

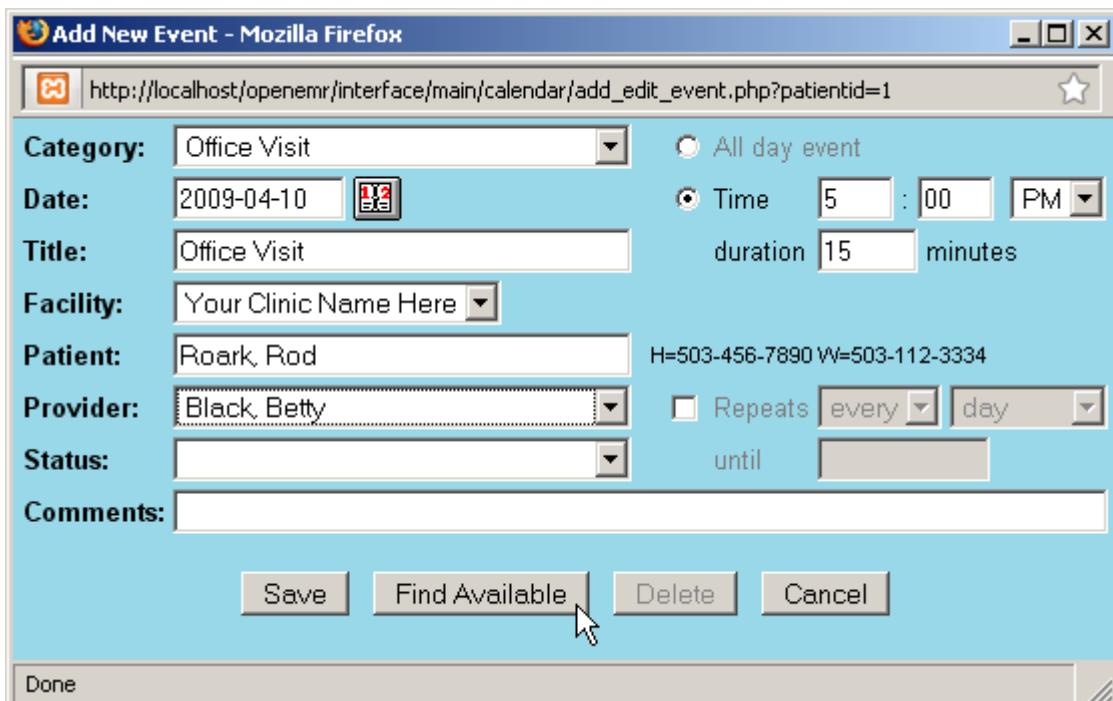
**Patient:** Roark, Rod H=503-456-7890 W=503-112-3334

**Provider:** Black, Betty   Repeats every  day

**Status:** until

**Comments:**

Done



This will present you with the same 'Add New Event' dialog used earlier. This time select "Office Visit" as the Category. 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.

The screenshot shows a Firefox browser window titled "Find Available Appointments - Mozilla Firefox". The address bar contains the URL [http://localhost/openemr/interface/main/calendar/find\\_appt\\_popup.php?providerid=3&catid=...](http://localhost/openemr/interface/main/calendar/find_appt_popup.php?providerid=3&catid=...). The main content area has a form with fields for "Start date" (set to 2009-04-10), "for" (set to 7 days), and a "Search" button. Below this is a table titled "Available Times" with columns for "Day" and "Available Times". The table lists days from Friday, April 10, to Thursday, April 16, 2009. Each day row shows AM and PM times for each hour from 8:30 to 4:45. The 9:30 AM slot for Wednesday, April 15, is highlighted in yellow and has a tooltip "Choose 09:30 am" displayed near the cursor.

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.

Edit Event - Mozilla Firefox

http://localhost/openemr/interface/main/calendar/add\_edit\_event.php?eid=14

**Category:** Office Visit

All day event

**Date:** 2009-04-15

Time 9 : 30 AM

**Title:** Office Visit duration 15 minutes

**Facility:** Your Clinic Name Here

**Patient:** Roark, Rod H=503-456-7890 W=503-112-3334

**Provider:** Black, Betty  Repeats every  day

**Status:**  until 0000-00-00

**Comments:**

Last update by Cindy Cyan

Done

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 to the right of the current date ('>>'), shows the new appointment listed in the provider's schedule. Mousing over the appointment displays a tool-tip with information about that patient, such as date of birth.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 10, 2009

Top Bot All Users 2009-04-15 Day View Go Today Add Search

Administrator Betty Black All Facilities << Wednesday, April 15, 2009 >>

Administrator	B Black	G Green
8:00	8:00	8:00 IN
		8:15
	8:30 IN	8:30
	8:45	8:45
	9:00	9:00
	9:15	9:15
9:30 IN	9:30 09:30-Roark,Rod	9:30
9:45	9:45	9:45
10:00	10:00	10:00
10:15	10:15	10:15
10:30	10:30	10:30
10:45	10:45	10:45
11:00	11:00	11:00 LUNCH
11:15	11:15	

Active Patient: Rod Roark (1)  
Active Encounter:  
None  
Popups

Find: roark  
by: Name ID  
SSN DOB

Logout

javascript:goPid(1)

## 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, click on the time portion of the appointment line (to the immediate left of the patient's name). 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.

**Edit Event - Mozilla Firefox**

[http://localhost/openemr/interface/main/calendar/add\\_edit\\_event.php?date=20090415&eid=14](http://localhost/openemr/interface/main/calendar/add_edit_event.php?date=20090415&eid=14)

<b>Category:</b>	Office Visit	<input type="radio"/> All day event
<b>Date:</b>	2009-04-15	<input checked="" type="radio"/> Time 9 : 30 AM
<b>Title:</b>	Office Visit	duration 15 minutes
<b>Facility:</b>	Your Clinic Name Here	
<b>Patient:</b>	Roark, Rod H=503-456-7890 W=503-112-3334	
<b>Provider:</b>	Black, Betty	<input type="checkbox"/> Repeats every day until 0000-00-00
<b>Status:</b>		
<b>Comments:</b>	<ul style="list-style-type: none"> <li>* Reminder done</li> <li>+ Chart pulled</li> <li>x Cancelled</li> <li>? No show</li> <li>@ Arrived</li> <li>~ Arrived late</li> </ul> <input type="button" value="Appointment status"/>	
<input type="button" value="Delete"/> <input type="button" value="Cancel"/>		
<input type="button" value="Done"/>		

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

**OpenEMR - Mozilla Firefox**

[http://localhost/openemr/interface/main/main\\_screen.php?auth=login](http://localhost/openemr/interface/main/main_screen.php?auth=login)

Logged in:Cindy Cyan (Default)      Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24      April 10, 2009

All Users		2009-04-15	DayView	Go	Today	Add	Search
All Facilities	Administrator	Betty Black	<< Wednesday, April 15, 2009 >>				
Administrator		B Black		G Green			
8:00		8:00		8:00	IN		
				8:30	IN		
				8:45			
				9:00			
				9:15			
9:30		IN	9:30	09:30*Rod Roark			
			9:45				
10:00			10:00		Age 24 (1985-08-06) Reminded 4/10 5PM		
			10:15				
10:30			10:30				
			10:45				
11:00			11:00			11:00	LUNCH
			11:15				

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups  
Find: roark by: Name ID SSN DOB

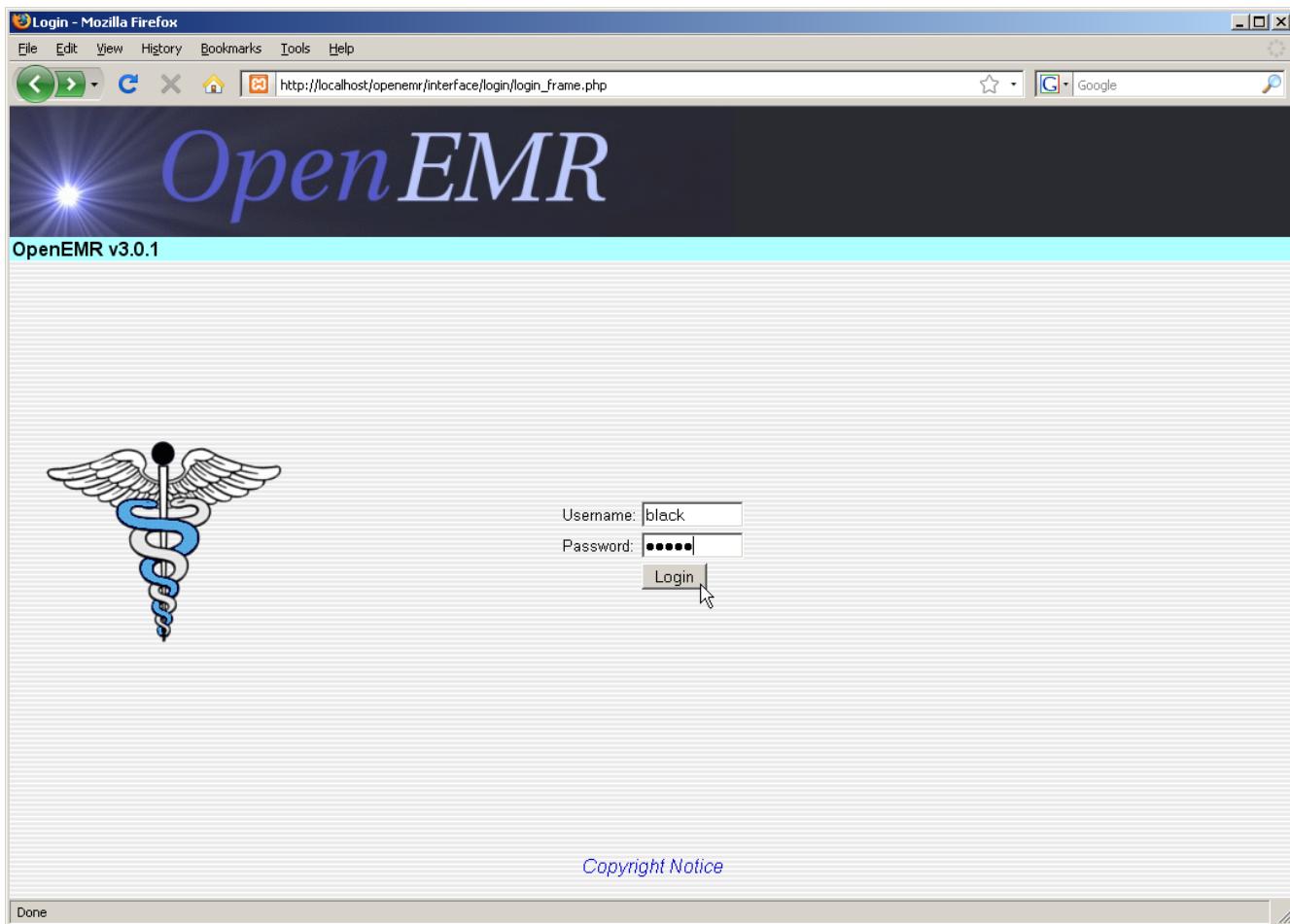
[Logout](#)

javascript:goPid(1)

Mousing over the appointment in the calendar now shows the note that was added to it, and the symbol next to the appointment time has changed to indicate it's new status.

## Encounters & Coding

Patient encounters are handled primarily by a clinics 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 at the top left of the page and click 'Go'.

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 show 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: None April 17, 2009

Top Bot All Users 2009-04-15 Day View Go Today Add Search

Betty Black All Facilities << Wednesday, April 15, 2009 >>

B Black

8:00  
8:30 IN  
8:45  
9:00  
9:15  
9:30 09:30@Roark,Rod  
9:45  
10:00  
10:15  
10:30  
10:45  
11:00  
11:15  
11:30

Patient Notes (See All) and Authorizations (More)

Active Patient: None  
Active Encounter: None  
Popups

Find: by: Name ID SSN DOB

Logout Done

## Opening a New Encounter

To begin the encounter, click on the patients name in the Appointment Calendar. This brings you to the patient's Demographics page, as well as the Patient Summary page which list any notes specific to that patient, and any medical issues, medications, etc. for that patient.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Demographics (More)

Top  Bot

Who Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
User Defined:

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

Choices Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland

HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife

Employer Occupation: Engineer Employer Name: NW Company

Medical Problems (More) Notes (More)

Immunizations (More)

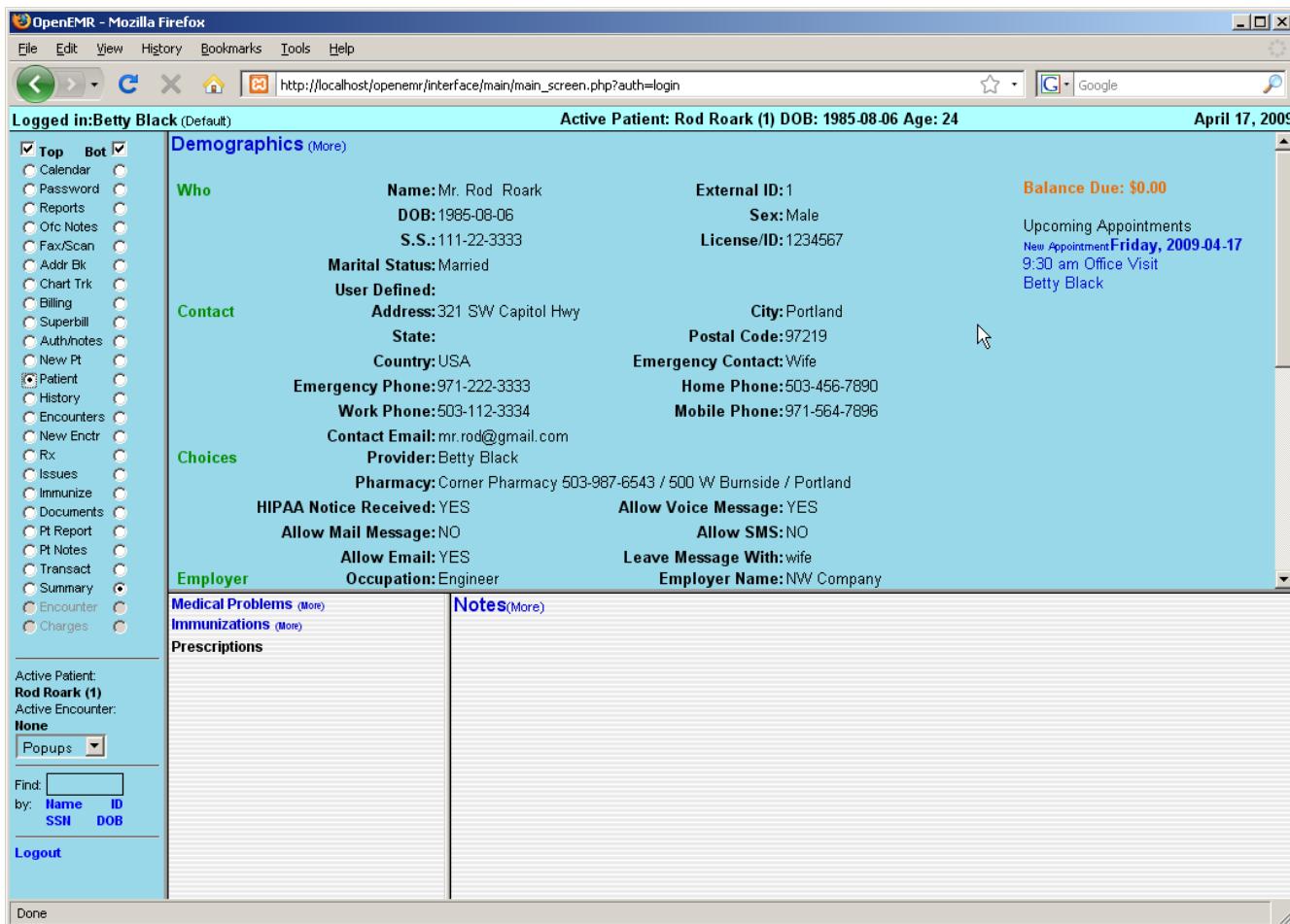
Prescriptions

Upcoming Appointments  
New Appointment Friday, 2009-04-17  
9:30 am Office Visit  
Betty Black

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find:   
by:  Name  ID  
 SSN  DOB

Logout Done



Select 'History' from navigation menu to view a summary of the patients Medical History and Lifestyle information. Click 'Patient History / Lifestyle (more)' to enter any information that may be incomplete.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Patient History / Lifestyle (More)

Top  Bot

General Risk Factors: Exams/Tests:

ECG Normal  
2/3/2004  
Prostate Exam Normal  
3/4/2005

Family History Father: 84 good health Mother: deceased 45

Siblings:  
Offspring:

Relatives Cancer: paternal aunt Tuberculosis:  
Diabetes: mother High Blood Pressure: mother  
Heart Problems: maternal grandfather Stroke:  
Epilepsy:  
Suicide:

Lifestyle Coffee: 2 cups/day Tobacco:  
Alcohol:  
Exercise Patterns:  
Counseling:  
Sleep Patterns:  
Seatbelt Use:  
Hazardous Activities:

Other Name/Value: Name/Value:

Medical Problems (More)  
Immunizations (More)  
Prescriptions

Notes (More)

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find:   
by:  Name  ID  
 SSN  DOB

Logout

Done

The screenshot shows the OpenEMR interface in Mozilla Firefox. The top navigation bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL http://localhost/openemr/interface/main/main\_screen.php?auth=login. The main content area displays the patient information for Rod Roark (1), DOB 1985-08-06, Age 24, on April 17, 2009. The 'Patient History / Lifestyle' section is active, showing various medical and social history details. On the left, a vertical navigation menu lists items like Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transect, Summary, Encounter, and Charges. A 'Popups' dropdown and search fields for Name, ID, SSN, and DOB are also present. The bottom left features a 'Logout' button and a 'Done' link.

When you're done, select 'Encounters' from the navigation menu on the left. This 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 on 'Patient Encounter' 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 'New Enctr' from the navigation list on the left.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Past Encounters and Documents [\(To Billing View\)](#)

Date	Issue	Reason/Form	Provider	Billing	Insurance
2009-04-17			black		Primary: Pacific Health
2009-04-10		Document: insurance_card.jpg.1 (Insurance Card)			

Top  Bot

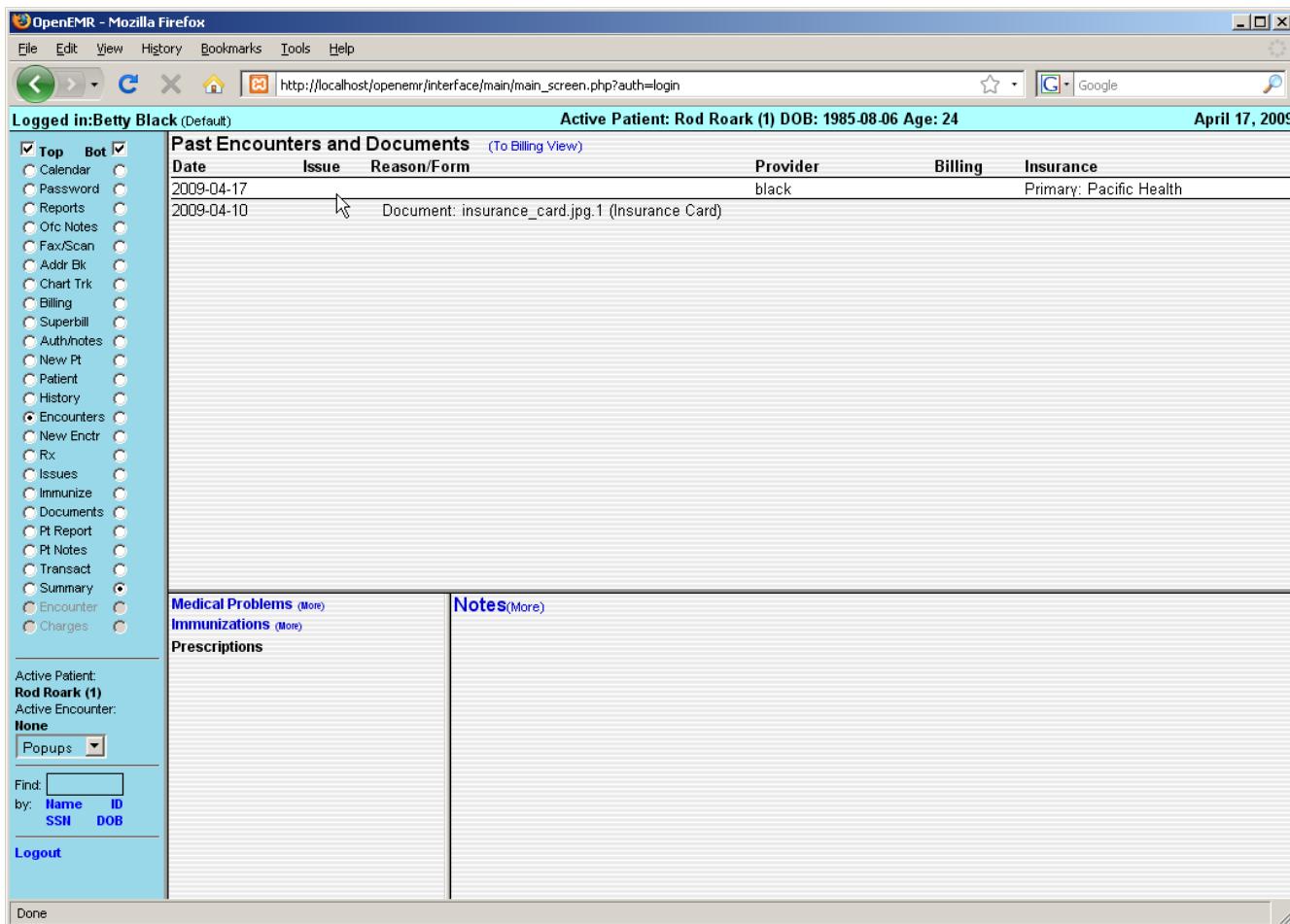
Calendar  Password  
 Reports  Ofc Notes  
 Ofc Notes  Fax/Scan  
 Addr Blk  Chart Trk  
 Billing  Superbill  
 Auth/Notes  New Pt  
 Patient  History  
 Encounters  New Enctr  
 Rx  Issues  
 Immunize  Documents  
 Pt Report  Pt Notes  
 Pt Notes  Transact  
 Summary  Encounter  
 Charges

Active Patient:  
Rod Roark (1)  
Active Encounter:  
None  
Popups

Find:   
by:  Name  ID  
 SSN  DOB

[Logout](#)

Done



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.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

New Encounter Form

Consultation Brief Description: cough & chest congestion

Visit Category: New Patient Facility: Your Clinic Name Here

Sensitivity: Normal Date of Service: 2009-04-17

Onset/hosp. date: 2009-04-17

[Save] [Add Issue]

To link this encounter/consult to an existing issue, click the desired issue above to highlight it and then click [Save]. Hold down <Ctrl> to select multiple issues.

Medical Problems (More) Notes (More)

Immunizations (More)

Prescriptions

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find: by: Name ID  
SSN DOB

Logout

Done

This screenshot shows the 'New Encounter Form' page in the OpenEMR web application. The top navigation bar includes links for File, Edit, View, Bookmarks, Tools, and Help. The title bar displays the user 'Logged in: Betty Black (Default)' and the active patient information 'Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24' along with the date 'April 17, 2009'. The main content area is titled 'New Encounter Form' and contains a 'Consultation Brief Description' field containing 'cough & chest congestion'. There are dropdown menus for 'Visit Category' (set to 'New Patient'), 'Facility' (set to 'Your Clinic Name Here'), 'Sensitivity' (set to 'Normal'), and date fields for 'Date of Service' (set to '2009-04-17') and 'Onset/hosp. date' (set to '2009-04-17'). Below these are '[Save]' and '[Add Issue]' buttons. A note on the right instructs users to link the encounter to existing issues by clicking them and then saving. The interface includes sections for 'Medical Problems (More)', 'Immunizations (More)', and 'Prescriptions'. On the left, a sidebar lists various clinic forms such as Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. At the bottom left, there are search fields for 'Find' (by Name, ID, SSN, DOB) and a 'Logout' button. A 'Done' button is located at the bottom right.

## 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 on the name of 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.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

Betty Black Patient Encounter

category

New Encounter Form

Review of Systems Checks

Speech Dictation

**SOAP**

Vitals

Review Of Systems

Fee Sheet

Misc Billing Options HCFA

Top Bot

Calendar Password Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17  
Popups

Find:   
by: Name ID SSN DOB

Logout

Done

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/Notes  New Pt  Patient  History  Encounters  New Encr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**SOAP**

Subjective: subjective description goes here

Objective: clinical observations go here

Assessment: doctor's assessment goes here

Plan: patient's treatment plan goes here

Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17  
Popups

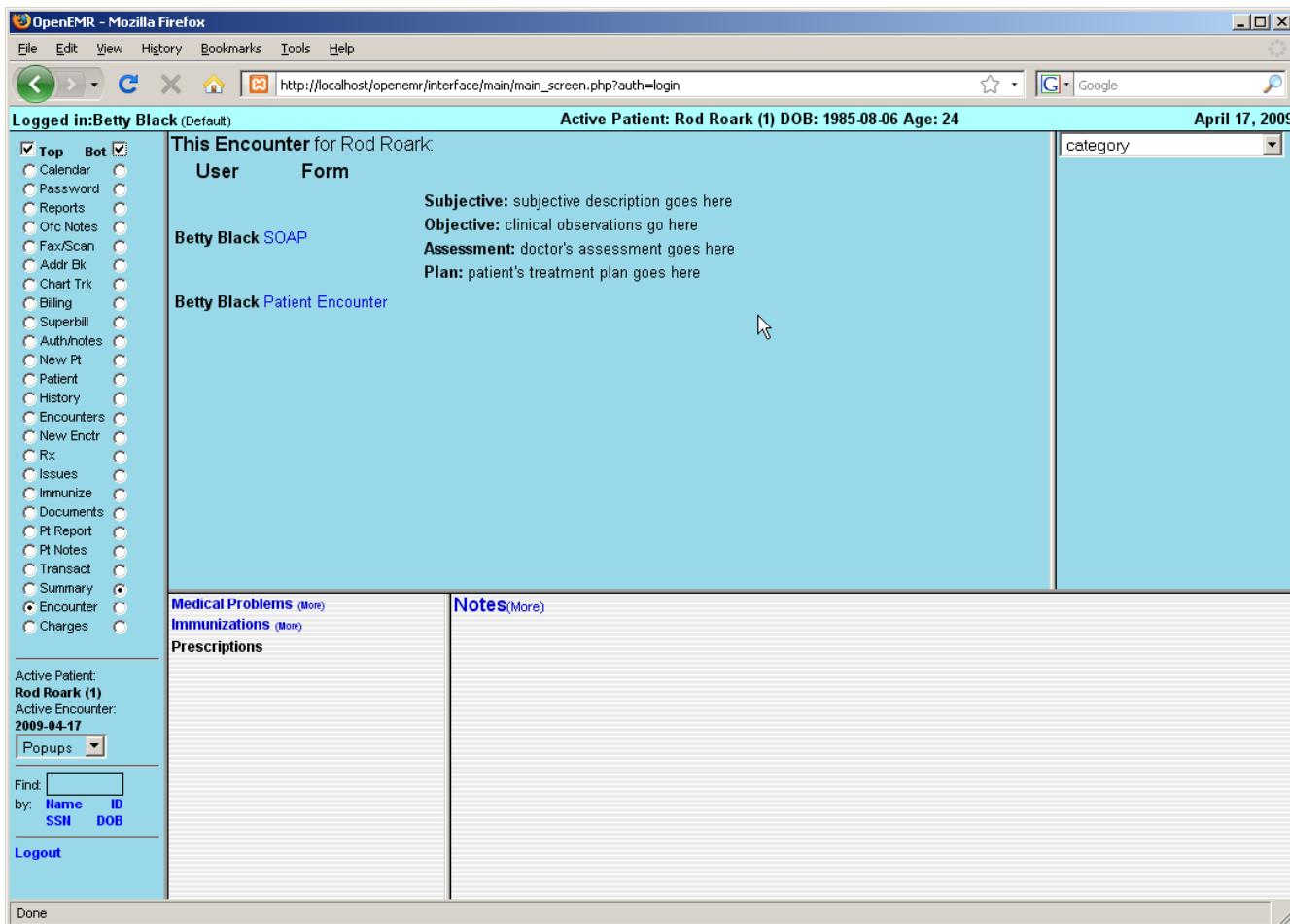
Find:   
by:  Name  ID  SSN  DOB

Logout Done

Save Form [\[Don't Save\]](#)

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.

You can select 'Charges' from the navigation menu on the left to see where information from the Fee Sheet will be displayed.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

**Fee Sheet**

New Patient      Established Patient

Search Results (0 items)

Add Copy   Search  ICD9  CPT4  HCPCS for  Search

Type Code Mod Price Units Justify Auth Delete Description

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding		Billing (More) Justify/Save
Superbill ICD9 Search CPT4 Search HCPCS Search Copay Other		[Receipt]
<b>Prescriptions</b>		
List Prescriptions Add Prescription		

Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17  
Popups

Find:   
by: Name ID  
SSN DOB

Logout

Done

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

New Patient Established Patient

New Patient Brief Limited Detailed Extended Comprehensive

HCPCS for  Search

Justify Auth Delete Description

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

Superbill ICD9 Search CPT4 Search HCPCS Search Copay Other

Billing (More) Justify/Save [Receipt]

Prescriptions

List Prescriptions Add Prescription

Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17  
Popups Find: by: Name ID SSN DOB

Logout Done

For example, select 'Detailed' from the "New Patient" drop-down list. The associated CPT code now appears on the list.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

**Fee Sheet**

New Patient Established Patient

Search Results (0 items)

Add Copy Search ICD9 CPT4 HCPCS for Search

Type	Code	Mod	Price	Units	Justify	Auth	Delete	Description
CPT4	99203		136.57	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

**Coding**

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

**Prescriptions**

List Prescriptions Add Prescription

Billing (More) Justify/Save [Receipt]

Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17  
Popups Find: by: Name ID SSN DOB

Logout Done

The screenshot shows the OpenEMR Fee Sheet interface. At the top, it displays the active patient as Rod Roark (1) with DOB 1985-08-06 and age 24, dated April 17, 2009. On the left, a sidebar lists various medical functions like Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter (selected), and Charges. Below this is a message area for Active Patient and Active Encounter, both set to Rod Roark (1) on 2009-04-17. It also includes a 'Popups' dropdown, a 'Find' field, and buttons for Name, ID, SSN, and DOB. A 'Logout' button is at the bottom. The main workspace is titled 'Fee Sheet' and contains sections for 'Coding' (with links to Superbill, ICD9 Search, CPT4 Search, HCPCS Search, Copay, and Other), 'Prescriptions' (with links to List Prescriptions and Add Prescription), and 'Billing' (with a table for entering codes, a 'More' link, and a 'Justify/Save' button). There's also a 'Receipt' link. At the very bottom of the workspace is a 'Done' button.

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'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

**Fee Sheet**

Top  Bot

New Patient Established Patient

Search Results (0 items)

Add Copy Search  ICD9  CPT4  HCPCS for rhinitis

Type Code Mod Price Units Justify Auth Delete Description

CPT4 99203 136.57 1

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

**Coding**

Superbill  
ICD9 Search  
CPT4 Search  
HCPCS Search  
Copay  
Other

**Prescriptions**

List Prescriptions Add Prescription

Billing (More) Justify/Save [Receipt]

Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17  
Popups

Find: by: Name ID SSN DOB

Logout Done

This screenshot shows the OpenEMR Fee Sheet interface. At the top, it displays the active patient as Rod Roark (1) with a DOB of 1985-08-06 and an age of 24, dated April 17, 2009. On the left, a sidebar lists various medical functions like Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. Below this is a section for Active Patient and Active Encounter, both set to Rod Roark (1) and dated 2009-04-17. A 'Popups' dropdown is open. To the right of the sidebar is the main 'Fee Sheet' area. It features a search bar with dropdowns for 'New Patient' and 'Established Patient', and a search button. Below the search bar is a table header with columns: Type, Code, Mod, Price, Units, Justify, Auth, Delete, and Description. A row in the table shows 'CPT4 99203' with a price of '136.57' and a quantity of '1'. There are checkboxes for Justify, Auth, and Delete. Below the table are buttons for 'Price Level: Standard', 'Provider: Black, Betty', 'Save', 'Refresh', and 'Cancel'. The main workspace is divided into three sections: 'Coding' (with links to Superbill, ICD9 Search, CPT4 Search, HCPCS Search, Copay, and Other), 'Prescriptions' (with links to List Prescriptions and Add Prescription), and 'Billing' (with a 'Justify/Save' button and a '[Receipt]' link). At the bottom of the interface are 'Logout' and 'Done' buttons.

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Fee Sheet

New Patient Established Patient

Search Results (6 items)

472.0 Chronic rhinitis  
477 Allergic rhinitis  
477.1 Allergic rhinitis, food  
477.2 Allergic rhinitis, animal hair/dander  
**477.8 Allergic rhinitis, other allergen**  
477.9 Allergic rhinitis, unspecified

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

Superbill  
ICD9 Search  
CPT4 Search  
HCPCS Search  
Copay  
Other

Billing (More) Justify/Save

[Receipt]

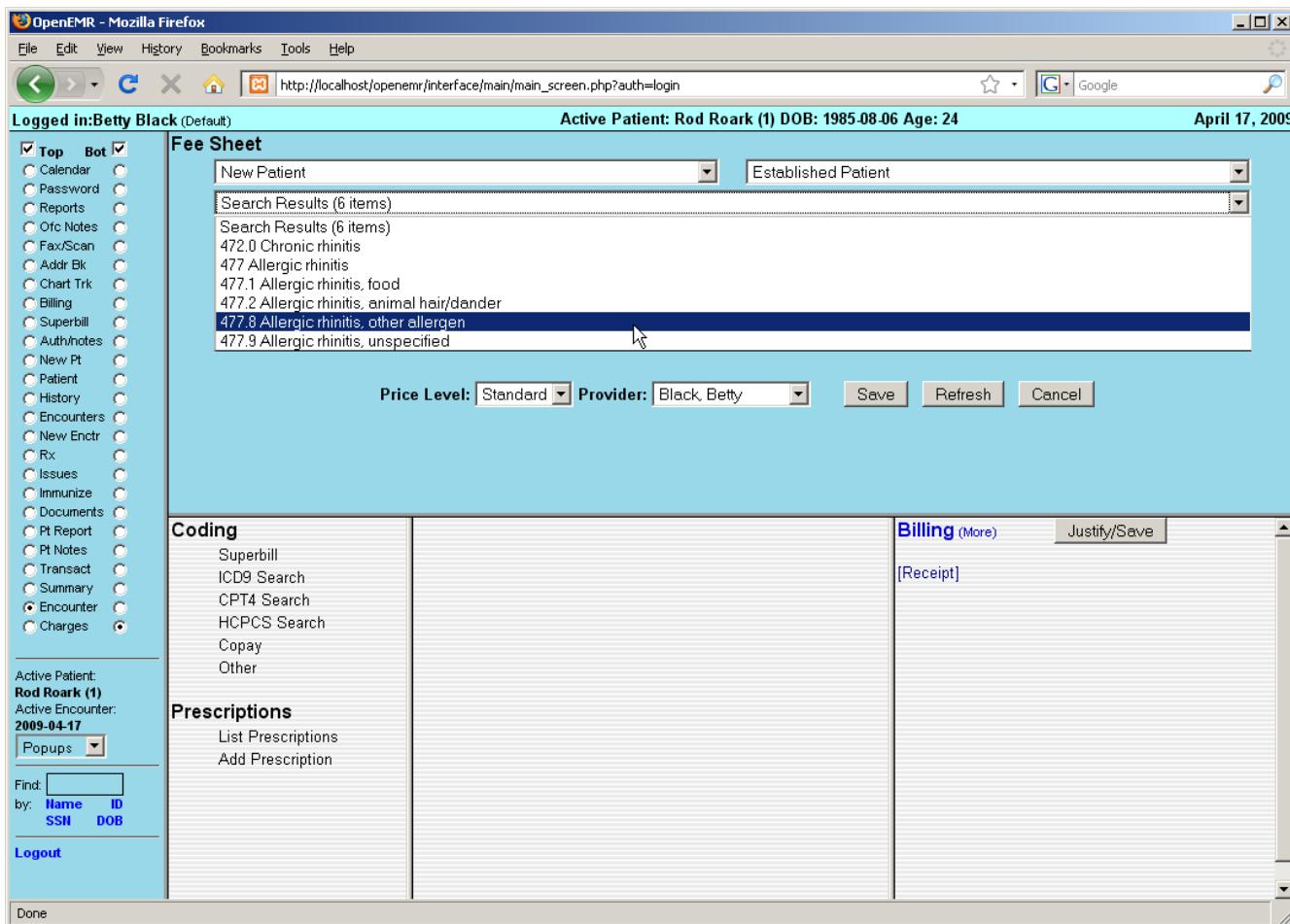
Prescriptions

List Prescriptions Add Prescription

Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17  
Popups

Find: by: Name ID SSN DOB

Logout Done



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'.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

**Fee Sheet**

New Patient Established Patient

Search Results (0 items)

Add Copay Search  ICD9  CPT4  HCPCS for  Search

Type	Code	Mod	Price	Units	Justify	Auth	Delete	Description
CPT4	99203		136.57	1	477.8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Allergic rhinitis, other allergen
ICD9	477.8					<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

**Coding**

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

**Prescriptions**

- List Prescriptions
- Add Prescription

Billing (More) Justify/Save [Receipt]

Find: by: Name ID SSN DOB

Logout Done

To see the Fee Sheet has been associated with this encounter, click 'Encounters' 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.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

**Subjective:** subjective description goes here  
**Objective:** clinical observations go here  
**Assessment:** doctor's assessment goes here  
**Plan:** patient's treatment plan goes here

Betty Black SOAP

Betty Black Patient Encounter

category

Past Encounters and Documents [\(To Billing View\)](#)

Date	Issue	Reason/Form	Provider	Billing	Insurance
2009-04-17	cough & chest congestion	black	99203	477.8	Primary: Pacific Health
2009-04-10	SOAP				
	Document: insurance_card.jpg.1 (Insurance Card)				<a href="#">View encounter 1,23</a>

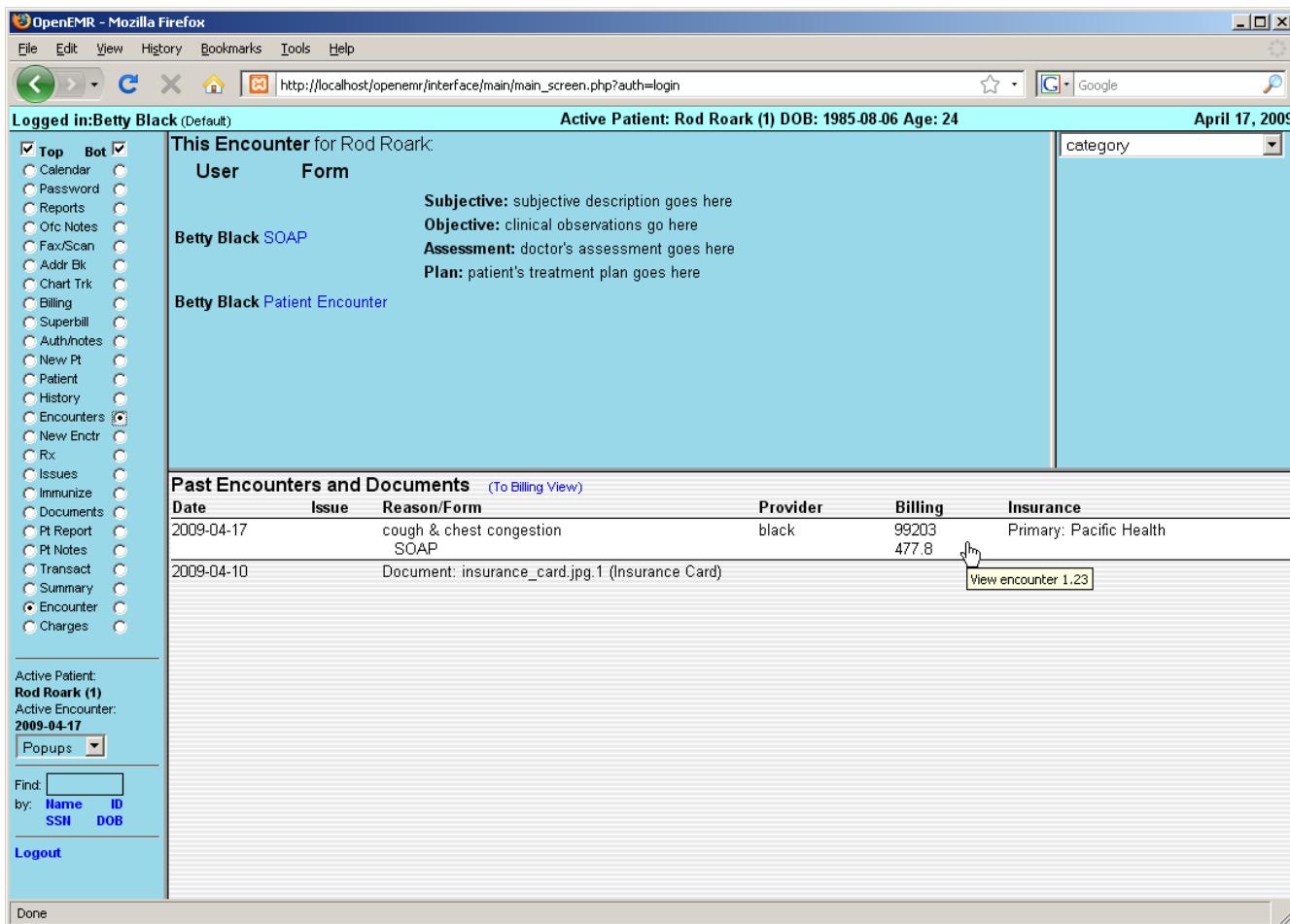
Active Patient: Rod Roark (1)  
Active Encounter: 2009-04-17

Popups

Find:   
by: [Name](#) [ID](#)  
[SSN](#) [DOB](#)

[Logout](#)

Done



Return to the Charges page to see a more detailed view of billing codes for this encounter. If you did not justify these codes in the previous step, you can do so now by selecting the checkboxes next to the codes you wish to associate and click 'Justify/Save'. This will also refresh the display in the Billing window.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

**Subjective:** subjective description goes here  
**Objective:** clinical observations go here  
**Assessment:** doctor's assessment goes here  
**Plan:** patient's treatment plan goes here

Betty Black SOAP

Betty Black Patient Encounter

category

Coding

Superbill  
ICD9 Search  
CPT4 Search  
HCPCS Search  
Copay  
Other

Billing (More) Justify/Save

[Receipt]

CPT4  99203 136.57  
total: 136.57

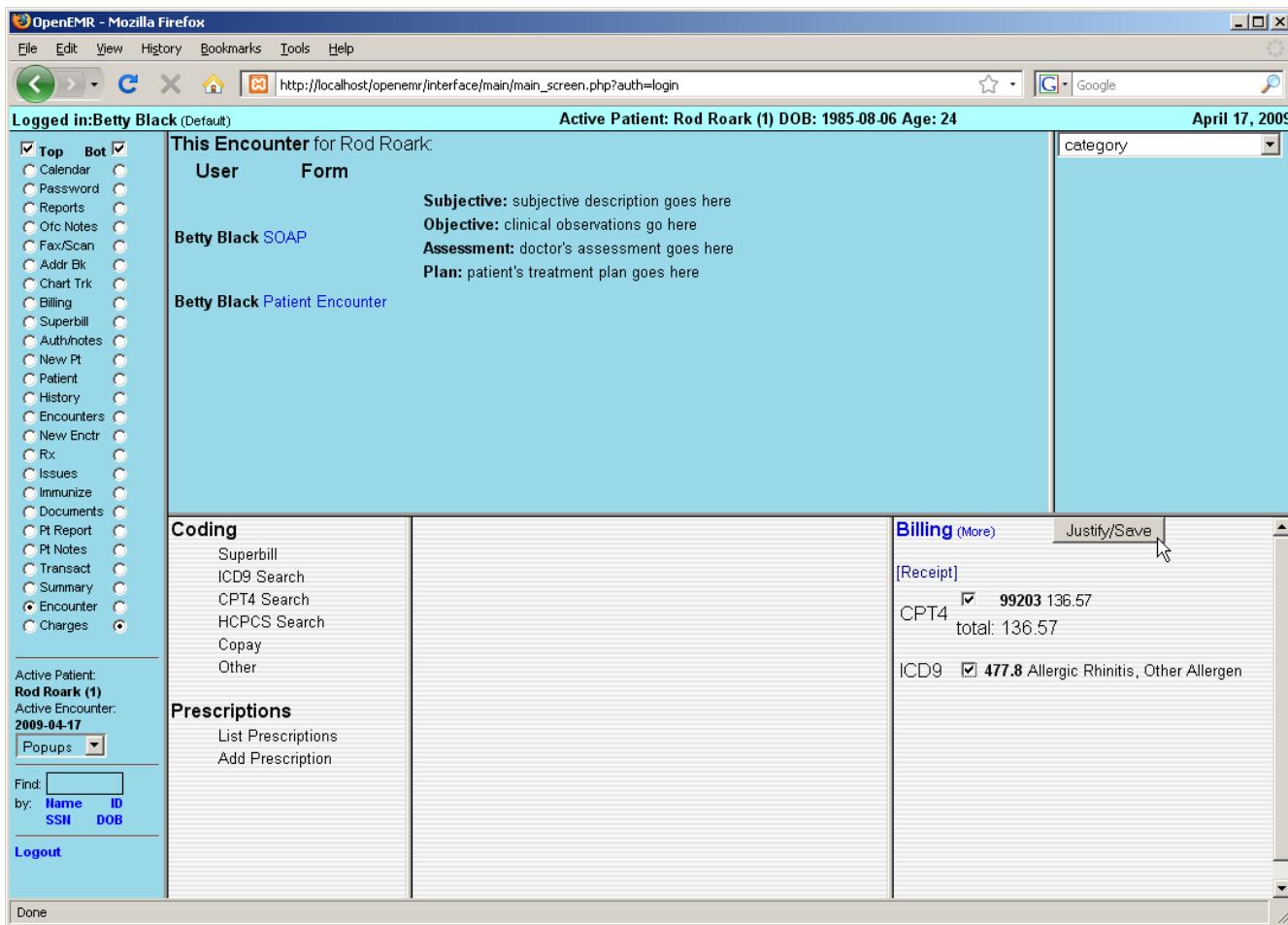
ICD9  477.8 Allergic Rhinitis, Other Allergen

Prescriptions

List Prescriptions  
Add Prescription

Find:   
by: Name ID  
SSN DOB

Logout Done



You can see that the ICD9 code has now been associated with the appropriate CPT procedure, as indicated by the code in parentheses to the right.

## Adding Prescriptions

To prescribe medication for this patient, click 'Add Prescription' on the left of the Charges page.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

**Betty Black SOAP**

**Betty Black Patient Encounter**

**Subjective:** subjective description goes here  
**Objective:** clinical observations go here  
**Assessment:** doctor's assessment goes here  
**Plan:** patient's treatment plan goes here

**Coding**

Currently Active

Starting Date April 17 2009

Provider Betty Black

Drug  Drug Lookup

Quantity

Medicine Units

Take  in

Refills 00 # of tablets: 0

Notes

Add to Medication List  No  Yes substitution allowed

**Billing (More)** Justify/Save

[Receipt]  99203 136.57 (477.8)  
CPT4 total: 136.57

ICD9  477.8 Allergic Rhinitis, Other Allergen

Find:   
by: Name ID SSN DOB

Logout Done

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. To use this function click 'Drug Lookup'. A box will pop up into which a search term may be entered.

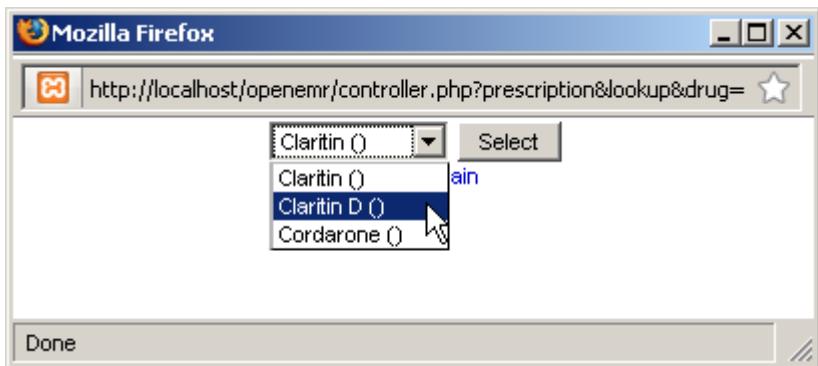
Mozilla Firefox

http://localhost/openemr/controller.php?prescription&lookup&drug= claritin

Drug: claritin

Done

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



Select the desired medication to return to the Prescription form. The selected medication has now been filled in 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.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default)

Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark:

User Form

**Betty Black SOAP**

**Subjective:** subjective description goes here  
**Objective:** clinical observations go here  
**Assessment:** doctor's assessment goes here  
**Plan:** patient's treatment plan goes here

**Betty Black Patient Encounter**

**Coding**

Print

Email

Fax

Auto Send

**Billing (More)** Justify/Save

[Receipt]

CPT4  99203 136.57 (477.8)  
total: 136.57

ICD9  477.8 Allergic Rhinitis, Other Allergen

**Prescriptions**

List Prescriptions

Add Prescription

Find:   
by: Name ID  
SSN DOB

Logout Done

Clicking 'Print' 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.

controller.php (application/pdf Object) - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/controller.php?prescription&send&id=25

OpenEMR controller.php (application/pdf O...)

1 / 1 | Find

75% | Sign |

**RX**

**Your Clinic Name Here**  
1234 SW Main St  
Portland, OR 97205  
Tel: 503-123-4567  
Fax: 503-123-4568

**Betty Black**  
DEA: \_\_\_\_\_

Patient Name & Address  
Rod Roark  
321 SW Capitol Hwy  
Portland, 97219  
503-456-7890

Date of Birth  
08/06/1985

Medical Record #  
0000000001

Prescriptions

Rx: Claritin D 100 mg [tablet] substitution allowed  
Disp #: 20  
Sig: 1 tablet per os q.d.

Refills: 2 of quantity 20

Signature: \_\_\_\_\_  
Date: 2009-04-17

Done

## 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 screenshot shows the OpenEMR interface in Mozilla Firefox. The top bar displays 'OpenEMR - Mozilla Firefox' and the URL 'http://localhost/openemr/interface/main/main\_screen.php?auth=login'. The main content area is titled 'Logged in: Betty Black (Default)'. It shows the 'Demographics' section for 'Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24' on April 21, 2009. The 'Who' section includes Name: Mr. Rod Roark, DOB: 1985-08-06, S.S.: 111-22-3333, Marital Status: Married, Sex: Male, External ID: 1, License/ID: 1234567, and Balance Due: \$136.57. The 'Contact' section includes Address: 321 SW Capitol Hwy, City: Portland, State: OR, Postal Code: 97219, Country: USA, Emergency Contact: Wife, Home Phone: 503-456-7890, Work Phone: 503-112-3334, Mobile Phone: 971-564-7896, Contact Email: mr.rod@gmail.com, Provider: Betty Black, Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland, HIPAA Notice Received: YES, Allow Voice Message: YES, Allow Mail Message: NO, Allow SMS: NO, Allow Email: YES, Leave Message With: wife, Occupation: Engineer, and Employer Name: NW Company. The 'Choices' section includes New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, PI Report, PI Notes, Transact, Summary, Encounter, and Charges. The 'Employer' section includes Medical Problems, Medications, Notes, and Immunizations. The left sidebar shows Active Patient: Rod Roark (1), Active Encounter: None, and a search bar for Name, ID, SSN, and DOB. The bottom status bar shows the URL 'http://localhost/openemr/interface/patient\_file/summary/stats\_full.php?active=all'.

From the patient's Summary page, click 'Medical Problems (more)', or select 'Issues' from the navigation menu on the left to display the Issues list.

You can now see the prescription added earlier has been included in the Issues list as a Medication. Click 'Add Issue' to add a new medical issue you want to **kept track of for this patient**.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Add Blk  Chart Trk  Billing  Superbill  Auth/Notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transect  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
**Marital Status:** Married  
**User Defined:**

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

**HIPAA Notice Received:** YES **Allow Voice Message:** YES  
**Allow Mail Message:** NO **Allow SMS:** NO  
**Allow Email:** YES **Leave Message With:** wife  
**Employer** Occupation: Engineer **Employer Name:** NW Company

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
Medications	Claritin D	2009-04-17			Unknown or N/A			0

Add Issue Add Encounter To History Back

Find: r by: Name ID SSN DOB

Logout Done

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.

Add NewIssue - Mozilla Firefox

http://localhost/openemr/interface/patient\_file/summary/add\_edit\_issue.php?issue=0

Type:  Problem  Allergy  Medication  Surgery  Dental

HTN  
asthma  
diabetes  
hyperlipidemia (Select one of these, or type your own title)

Title: bronchitis

Begin Date: 2009-04-17

End Date:  (leave blank if still active)

Diagnosis:

Occurrence: Chronic/Recurrent

Referred by: Unknown or N/A

Outcome: Early Recurrence (<2 Mo)  Us quo  Worse  Pending followup

Destination: Late Recurrence (2-12 Mo)

Delayed Recurrence (> 12 Mo)

Chronic/Recurrent

Acute on Chronic  Cancel

Done

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.

Code Finder - Mozilla Firefox

http://localhost/openemr/interface/patient\_file/encounter/find\_code\_popup.php?codetype=I...

ICD9 Search for: rhinitis Search Erase

**Code Description**

472.0 Chronic rhinitis  
477 Allergic rhinitis  
477.1 Allergic rhinitis, food  
477.2 Allergic rhinitis, animal hair/dander  
477.8 Allergic rhinitis, other allergen  
477.9 Allergic rhinitis, unspecified

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

Add NewIssue - Mozilla Firefox

http://localhost/openemr/interface/patient\_file/summary/add\_edit\_issue.php?issue=0

Type:  Problem  Allergy  Medication  Surgery  Dental

HTN  
asthma  
diabetes  
hyperlipidemia (Select one of these, or type your own title)

Title: bronchitis

Begin Date: 2009-04-17 

End Date:  (leave blank if still active)

Diagnosis: ICD9:477.8

Occurrence: Chronic/Recurrent 

Referred by:

Outcome:  Resolved  Improved  Status quo  Worse  Pending followup

Destination:

 Save  Cancel

Done

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 NewIssue - Mozilla Firefox

http://localhost/openemr/interface/patient\_file/summary/add\_edit\_issue.php?issue=0

Type:  Problem  Allergy  Medication  Surgery  Dental

penicillin  
sulfa  
iodine  
codeine

(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:  Resolved

Destination:

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 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Add Blk  Chart Trk  Billing  Superbill  Auth/Notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black  
**Choices** Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland  
HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife  
**Employer** Occupation: Engineer Employer Name: NW Company

**Allergies**

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	penicillin	2009-01-01			Unknown or N/A			0

**Medical Problems**

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	bronchitis	2009-04-17		ICD9:477.8 (Allergic rhinitis, other allergen)	Chronic/Recurrent			0

**Medications**

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
	Claritin D	2009-04-17			Unknown or N/A			0

Add Issue Add Encounter To History Back

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find: r by: Name ID SSN DOB

Logout Done

## 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.

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.

**Issues and Encounters - Mozilla Firefox**

http://localhost/openemr/interface/patient\_file/problem\_encounter.php?issue=11

**Issues and Encounters for Rod Roark (1)**

Issues Section			Encounters Section	
Type	Title	Description	Date	Presenting Complaint
allergy	penicillin		2009-04-17	cough & chest congestion
medical_problem	bronchitis			
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.

Save   Add Issue   Cancel   

Done

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

**Issues and Encounters - Mozilla Firefox**

http://localhost/openemr/interface/patient\_file/problem\_encounter.php?issue=11

**Issues and Encounters for Rod Roark (1)**

Issues Section			Encounters Section	
Type	Title	Description	Date	Presenting Complaint
allergy	penicillin		2009-04-17	cough & chest congestion
medical_problem	bronchitis			
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.

Save   Add Issue   Cancel

Done

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

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

[Top](#) [Bot](#)

[Calendar](#) [Password](#) [Reports](#) [Ofc Notes](#) [Fax/Scan](#) [Add Blk](#) [Chart Trk](#) [Billing](#) [Superbill](#) [Auth/Notes](#) [New Pt](#) [Patient](#) [History](#) [Encounters](#) [New Enctr](#) [Rx](#) [Issues](#) [Immunize](#) [Documents](#) [Pt Report](#) [Pt Notes](#) [Transact](#) [Summary](#) [Encounter](#) [Charges](#)

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find:  by:  Name  ID  SSN  DOB

[Logout](#)

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
**Marital Status:** Married  
**User Defined:**

**Contact** Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
**Emergency Phone:** 971-222-3333 Emergency Contact: Wife  
**Work Phone:** 503-112-3334 Home Phone: 503-456-7890  
**Contact Email:** mr.rod@gmail.com Mobile Phone: 971-564-7896  
**Provider:** Betty Black  
**Pharmacy:** Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland

**HIPAA Notice Received:** YES **Allow Voice Message:** YES  
**Allow Mail Message:** NO **Allow SMS:** NO  
**Allow Email:** YES **Leave Message With:** wife

**Employer** Occupation: Engineer Employer Name: NW Company

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
<b>Allergies</b>								
penicillin		2009-01-01			Unknown or N/A			0
<b>Medical Problems</b>								
bronchitis		2009-04-17		ICD9:477.8 (Allergic rhinitis, other allergen)	Chronic/Recurrent			1
<b>Medications</b>								
Claritin D		2009-04-17			Unknown or N/A			0

[Add Issue](#) [Add Encounter](#) [To History](#) [Back](#)

## Immunizations

Click 'Summary' on the left to return to the Patient Summary page. Now click 'Immunizations (more)' to add an immunization for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

[http://localhost/openemr/interface/main/main\\_screen.php?auth=login](#)

**Demographics (More)**

**Who**

Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333

External ID: 1  
Sex: Male  
License/ID: 1234567

**Balance Due: \$136.57**

Upcoming Appointments  
New Appointment

**Contact**

Marital Status: Married  
User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black

**Choices**

HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife

**Employer**

Occupation: Engineer Employer Name: NW Company

**Medical Problems (More)**  
bronchitis

**Allergies (More)**  
penicillin

**Medications (More)**  
Claritin D

**Immunizations (More)**

**Prescriptions**

Claritin D 1 in tablet q.d.

Find:  by:  Name  ID  
 SSN  DOB

Logout

Done

This page contains a form for entering information on the any immunizations the patient has received.

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/Notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transect  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Contact: Wife

**Balance Due: \$136.57**

Upcoming Appointments  
[New Appointment](#)

**Immunizations**

Immunization: DT 1  
Date Administered: 2009-04-17  
Immunization Manufacturer: AAA Drugs  
Immunization Lot Number: 765  
Name and Title of Immunization Administrator: Black, Betty or choose Black, Betty  
Date Immunization Information Statements Given: 2009-04-17  
Date of VIS Statement (?): 2009-04-17  
Notes:

Print Shot Record Save Immunization Clear

Vaccine v Date Manufacturer Lot Number Administered By Education Date Note

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find: r  
by: Name ID  
SSN DOB

Logout

Done

Click 'Save Immunization'. The newly added immunization now appears in the list at the bottom of the screen.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Add Blk  Chart Trk  Billing  Superbill  Auth/Notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Contact: Wife

**Balance Due: \$136.57**

External ID: 1  
Sex: Male  
License/ID: 1234567

Upcoming Appointments  
New Appointment

**Immunizations**

Immunization: DT 1  
Date Administered: 2009-04-21  
Immunization Manufacturer:   
Immunization Lot Number:   
Name and Title of Immunization Administrator: Black, Betty or choose Black, Betty  
Date Immunization Information Statements Given: 2009-04-21  
Date of VIS Statement: 2009-04-21  
Notes:

Print Shot Record Save Immunization Clear

Vaccine v Date Manufacturer Lot Number Administered By Education Date Note

Vaccine	Date	Manufacturer	Lot Number	Administered By	Education	Date	Note
DT 1	2009-04-17	AAA Drugs	765	Black, Betty		2009-04-17	

Logout Done

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

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Add Blk  Chart Trk  Billing  Superbill  Auth/Notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transect  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black  
**HIPAA Notice Received:** YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
**Employer** Occupation: Engineer Leave Message With: wife  
Employer Address: 44566 Industry Way Employer Name: NW Company  
State: OR City: Portland  
Postal Code: 97002

**Medical Problems (More)**  
bronchitis

**Allergies (More)**  
penicillin

**Medications (More)**  
Claritin D

**Immunizations (More)**  
2009-04-21 - DT 1

**Prescriptions**  
Claritin D 1 in tablet q.d.

**Notes (More)**  
Balance Due \$136.57

Upcoming Appointments  
New Appointment

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups   
Find:   
by:  Name  ID  
 SSN  DOB

[Logout](#)

Done

## 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

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main window displays a calendar for Tuesday, April 21, 2009. The calendar grid shows three columns: "Administrator", "B Black", and "G Green". The "Administrator" column has a pink background. The "B Black" and "G Green" columns have a light blue background. Specific times are highlighted in green, such as 8:00 IN, 8:30 IN, 9:30 IN, and 11:00 LUNCH. A sidebar on the left contains a navigation menu with various links like Top, Bot, Calendar, Password, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, Pt Notes, Transect, Summary, Encounter, and Charges. Below the menu is a "Patient Notes (See All)" section. At the bottom left, there is a search bar with "Find: roark" and dropdown options "by: Name ID SSN DOB". A "Logout" link is also present at the bottom left.

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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: None April 21, 2009

Top  Bot

[Help] Showing 1 of 1 records found.

Name	Phone	SS	DOB	ID	PID	[Number Of Encounters]	[Days Since Last Encounter]	[Date of Last Encounter]	[90 Days From Last Encounter]
Roark, Rod	503-456-7890	111-22-3333	08/06/1985	1	1	2	4	04/17/09	Thursday, 07/16/09

Active Patient:  
None  
Active Encounter:  
None  
Popups

Find: roark  
by: Name ID  
SSN DOB

Logout

Done

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

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black  
**Choices** Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland  
HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife  
**Employer** Occupation: Engineer Employer Name: NW Company

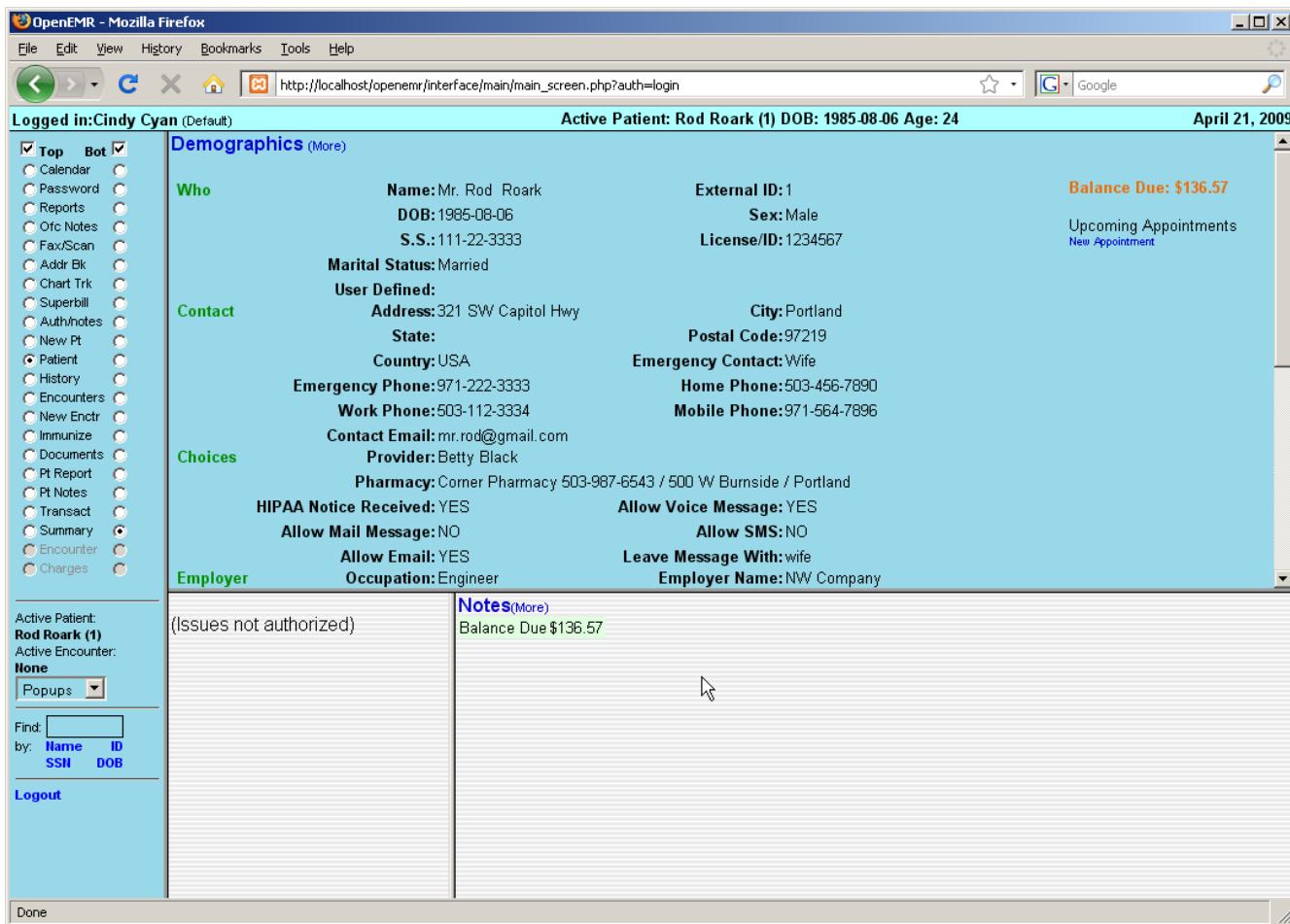
**Notes (More)**  
(Issues not authorized) Balance Due \$136.57

Active Patient: Rod Roark (1)  
Active Encounter:  
None  
Popups

Find:   
by:  Name  ID  
 SSN  DOB

Logout

Done



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

Click 'Notes (more)' to add a note for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black  
**Choices** Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland  
HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife  
**Employer** Occupation: Engineer Employer Name: NW Company

**Patient Notes (Back)**

(Issues not authorized)

Add New Note

Type: Unassigned To: Cyan, Cindy

New employer & insurance e Unassigned  
Chart Note  
Insurance  
New Document  
Pharmacy  
Prior Auth  
Referral  
Test Scheduling  
Bill/Collect  
Other

1-2009.  
[Note] [Live] [Only Inactive]

Done

The 'Patient Notes' page will present you with a text box 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 'Add New Note'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
**Marital Status:** Married  
**User Defined:**

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

HIPAA Notice Received: YES Allow Voice Message: YES

(Issues not authorized)

**Patient Notes (Back)**

Add New Note

Type: Unassigned To: Cyan, Cindy

[Add New Note]

Change Activity

View: [All] [Only Active] [Only Inactive]

Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Change Activity

Done

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

Click 'Patient Notes (back)' to return to the patient summary.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar   
 Password   
 Reports   
 Ofc Notes   
 Fax/Scan   
 Addr Blk   
 Chart Trk   
 Superbill   
 Auth/notes   
 New Pt   
 Patient   
 History   
 Encounters   
 New Enctr   
 Immunize   
 Documents   
 Pt Report   
 Pt Notes   
 Transact   
 Summary   
 Encounter   
 Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
User Defined:

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

**Choices** Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland  
HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife

**Employer** Occupation: Engineer Employer Name: NW Company

Active Patient: Rod Roark (1)  
Active Encounter:  
None  
Popups

Find: roark  
by: Name ID  
SSN DOB

Logout

Notes (More)  
(Issues not authorized)  
Balance Due \$136.57  
Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Done

The new note is now listed on the Summary page.

## Transactions

Click 'Transact' in the navigation menu 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

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Top  Bot

Calendar  Password  Reports  Orc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Authnotes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State:   
Country: USA  
Emergency Phone: 971-222-3333  
Work Phone: 503-112-3334  
Contact Email: mr.rod@gmail.com  
Provider: Betty Black  
**External ID:** 1  
**Sex:** Male  
**License/ID:** 1234567  
**Balance Due:** \$136.57  
**Upcoming Appointments** [New Appointment](#)

**Choices**

**Transaction Type:**  Referral  Referral  Patient Request  Physician Request  Legal  Billing

**Referral Date:**  **Refer To:**  **Refer By:**  **Reason:**

**External Referral:**  **Risk Level:**  **Requested Service:**  **Referrer Diagnosis:**  **Include Vitals:**

Counter-Referral [\[Save Transaction\]](#)

Find: roark by:  Name  ID  SSN  DOB

Logout Done

Select 'Referral' from the drop-down list to begin a new Referral transaction.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black

**Choices**

**Transaction Type:** Referral

Referral

Referral Date:	2009-04-21	Refer By:	Betty Black
Refer To:	Orange, Ophelia	Reason:	See Dr. Orange for lesion on scalp.
External Referral:	Yes	Referrer Diagnosis:	
Risk Level:	Low	Include Vitals:	No
Requested Service:			

Counter-Referral

[Save Transaction] 

Done

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.

Click 'Save Transaction'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black

**Patient Transactions (Add Transaction) (Print Blank Referral Form)**

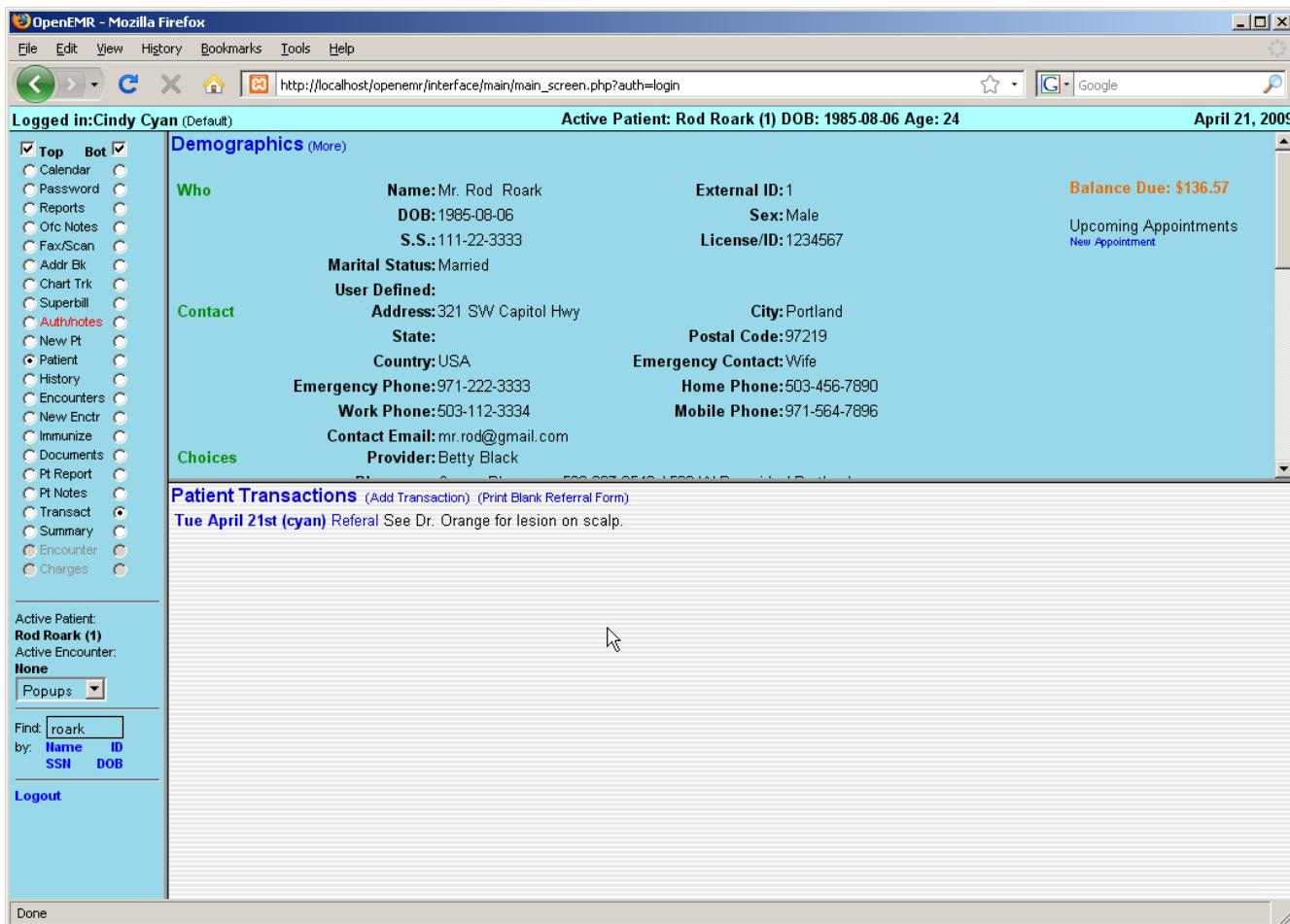
Tue April 21st (cyan) Referral See Dr. Orange for lesion on scalp.

Active Patient: Rod Roark (1)  
Active Encounter:  
None  
Popups

Find: roark  
by: Name ID  
SSN DOB

Logout

Done



The referral is now in the Patient Transactions list.

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

Referral Form - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/patient\_file/transaction/print\_referral.php?transid=1

OpenEMR Referral Form

Your Clinic Name Here

Clinic ID	
Client ID	1
Control No.	1
Date	2009-04-21

REFERRAL FORM

Name Mr. Rod Roark Age 23 Gender Male

Address 321 SW Capitol Hwy, Portland Postal 97219 Phone 503-456-7890

Reference Reason See Dr. Orange for lesion on scalp.

Diagnosis

Reference classification (risk level) Low

Doctor's name and signature Betty Black

Referred to Orange, Ophelia / Universal Health Center

---

Your Clinic Name Here

Clinic ID	
Client ID	1
Control No.	1
Date	2009-04-21

Name Mrs. Marie M Maroon Age 23 Gender Male

Health centre/clinic Universal Health Center

Address 4456 SE Washington St, Portland OR Postal 97215 Phone

Reference Reason See Dr. Orange for lesion on scalp.

Client medical history summary:

Blood pressure / Height \_\_\_\_\_ Weight \_\_\_\_\_

Referer name and signature Betty Black

Specialist name and signature Orange, Ophelia

Done

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

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

## Basic Transactions

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addl Blk  Chart Trk  Billing  Superbill  Auth/Notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics** ([More](#)) ([Delete](#))

**Who**

Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married

**Contact**

Address: 321 SW Capitol Hwy  
State:   
Country: USA  
Emergency Phone: 971-222-3333  
Work Phone: 503-112-3334  
Contact Email: mr.rod@gmail.com  
Provider: Betty Black  
Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland

**External ID:** 1  
**Sex:** Male  
**License/ID:** 1234567

**Balance Due:** \$136.57  
Upcoming Appointments  
[New Appointment](#)

**HIPAA Notice Received:** YES **Allow Voice Message:** YES

**Transaction Type:** Physician Request

**Details:**  
request pre-authorization for air filtration system  
in patient home.

[Save Transaction]

Active Patient:  
**Rod Roark (1)**  
Active Encounter:  
**None**  
[Popups]

Find:   
by:  Name  ID  
 SSH  DOB

[Logout](#)

Done

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 Transaction' when finished.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in:Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Demographics (More)**

**Who** Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333  
Marital Status: Married  
**Contact** User Defined:  
Address: 321 SW Capitol Hwy  
State: City: Portland  
Country: USA Postal Code: 97219  
Emergency Phone: 971-222-3333 Emergency Contact: Wife  
Work Phone: 503-112-3334 Home Phone: 503-456-7890  
Contact Email: mr.rod@gmail.com Mobile Phone: 971-564-7896  
Provider: Betty Black  
**Choices** Pharmacy: Corner Pharmacy 503-987-6643 / 500 W Burnside / Portland  
HIPAA Notice Received: YES Allow Voice Message: YES  
Allow Mail Message: NO Allow SMS: NO  
Allow Email: YES Leave Message With: wife  
**Employer** Occupation: Engineer Employer Name: NW Company

**Patient Transactions** (Add Transaction) (Print Blank Referral Form)

Tue April 21st (cyan) Physician Request request pre-authorization for air filtration system in patient home.  
Tue April 21st (cyan) Referral See Dr. Green for lesion on scalp.

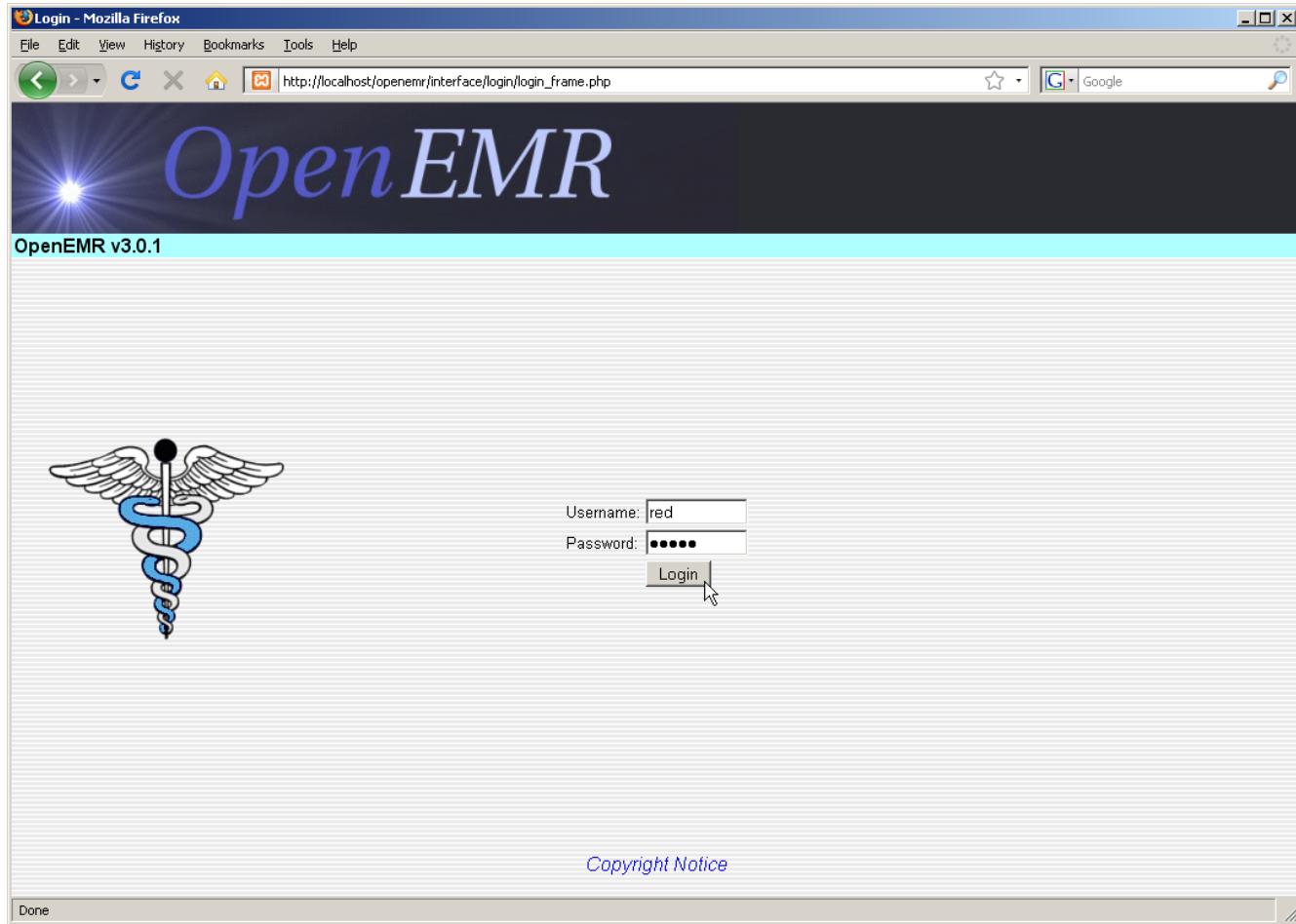
Find: roark  
by: Name ID SSN DOB

Logout Done

The new transaction has now been added to the list along with the referral. Click on the date of 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.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Do you want Firefox to remember this password?

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

All Users 2009-04-21 Day View Go Today Add Search

Administrator Betty Black All Facilities << Tuesday, April 21, 2009 >>

	Administrator	B Black	G Green
8:00		8:00	8:00 IN
			8:15
		8:30 IN	8:30
		8:45	8:45
		9:00	9:00
		9:15	9:15
9:30	IN	9:30	9:30
9:45		9:45	9:45
10:00		10:00	10:00
10:15		10:15	10:15
10:30		10:30	10:30
10:45		10:45	10:45
11:00		11:00	11:00 LUNCH

Patient Notes (See All)

Active Patient: None

Active Encounter: None

Popups

Find:  by: Name ID SSN DOB

Logout Done

The screenshot displays the OpenEMR software interface. On the left, a navigation menu lists various medical functions like Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. The 'Billing' option is highlighted with a cursor. The top right shows the active patient as 'None' and the date as 'April 21, 2009'. Below the date is a 'Day View' calendar showing time slots from 8:00 to 11:00 for three staff members: Administrator, B Black, and G Green. The grid indicates patient arrivals ('IN') and departures ('LUNCH'). At the bottom left, there are search fields for 'Find' (Name, ID, SSN, DOB) and a 'Logout' button.

Select '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 screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The menu bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL "http://localhost/openemr/interface/main/main\_screen.php?auth=login". The top right corner displays "Active Patient: None" and the date "April 21, 2009". On the left, a sidebar titled "Logged in: Randy Red (Default)" lists various menu items with radio buttons: Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Add Blk, Chart Trk, Billing (which is selected), Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, Pt Notes, Transect, Summary, Encounter, and Charges. Below this is a section for "Active Patient" and "Active Encounter", both set to "None". A "Popups" dropdown is set to "Popups". A "Find" field is present with options "by: Name ID SSN DOB". A "Logout" link is at the bottom of the sidebar. The main content area is titled "Billing Report" and contains fields for "From" (2009-04-21) and "To" (empty), checkboxes for "Show Unbilled Only" (checked) and "Show Authorized Only" (unchecked), and buttons for "[View Printable Report]", "[Reports]", "[EOBs]", "[View Log]", "Generate X12", "Generate HCFA", "Mark as Cleared", and "Re-Open". It also shows "HCFA Margins: Left: 24 Top: 27". At the bottom of the main area, it says "Patient Notes (See All)".

The Billing Report page will automatically display any billable encounters that were generated today. To view billables from a different time period enter the 'From' and 'To' dates using the date selection tool, and click 'Change View' in the top right corner of the screen.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar  Password  
 Admin  Reports  
 Ofc Notes  Fax/Scan  
 Addr Blk  Chart Trk  
 Billing  Superbill  
 Auth/Notes  New Pt  
 Patient History  
 Encounters  New Enctr  
 Immunize  Documents  
 Pt Report  Pt Notes  
 Transact  Summary  
 Encounter  Charges

**Billing Report**

From: 2009-04-13  To:   Show Unbilled Only  Show Authorized Only [Change View] or [Export OFX]  
[View Printable Report] [Reports] [EOBs]

April, 2009

Generate X12 Generate HTML HCFA Margins: Left: 24 Top: 27

Today

HCFA Margins: Left: 24 Top: 27

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

Fri, Apr 17

Patient Notes ([See All](#))

Active Patient: **None**  
Active Encounter: **None**  
Popups   
Find:   
by:  Name  ID  
 SSN  DOB

[Logout](#)

Done

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

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar  Password  
 Admin  Reports  
 Ofc Notes  Fax/Scan  
 Addr Blk  Chart Trk  
 Billing  Superbill  
 Auth/notes  New Pt  
 Patient  History  
 Encounters  New Enctr  
 Immunize  Documents  
 Pt Report  Pt Notes  
 Transact  Summary  
 Encounter  Charges

**Billing Report**

From: 2009-04-13  To: 2009-04-17   Show Unbilled Only  Show Authorized Only [Change View] or [Export OFX]  
[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

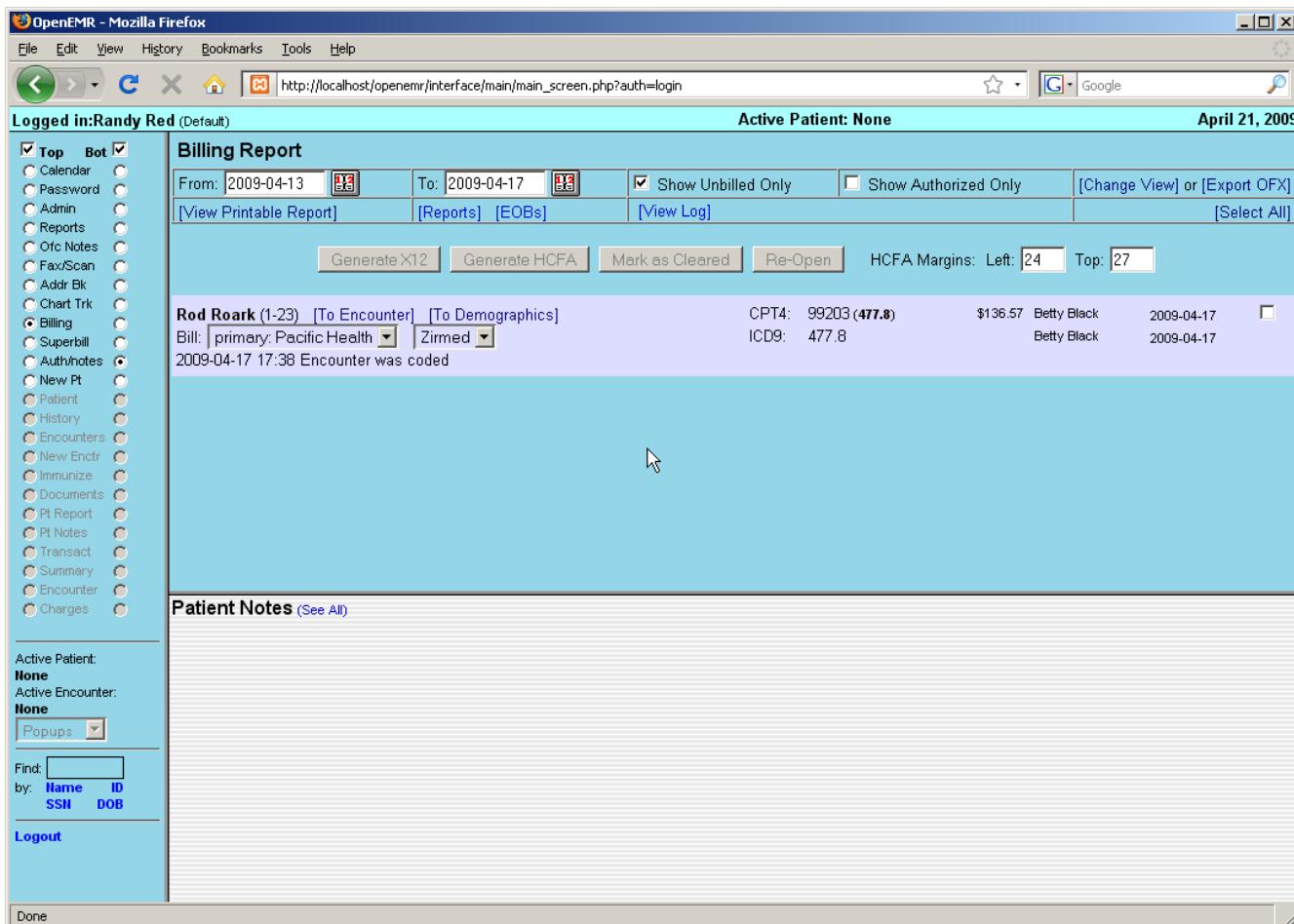
Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17   
Bill: primary: Pacific Health  ICD9: 477.8 Betty Black 2009-04-17  
2009-04-17 17:38 Encounter was coded

Patient Notes ([See All](#))

Active Patient: **None**  
Active Encounter: **None**  
Popups   
Find:  by:  Name  ID  
 SSN  DOB

[Logout](#)

Done



## 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.

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

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

Billing Report

From: 2009-04-13  To: 2009-04-17  Show Unbilled Only  Show Authorized Only [Change View] or [Export OFX]

[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12  Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17   
Bill: primary: Pacific Health  ICD9: 477.8 Betty Black 2009-04-17  
2009-04-17 17:38 Encounter was coded

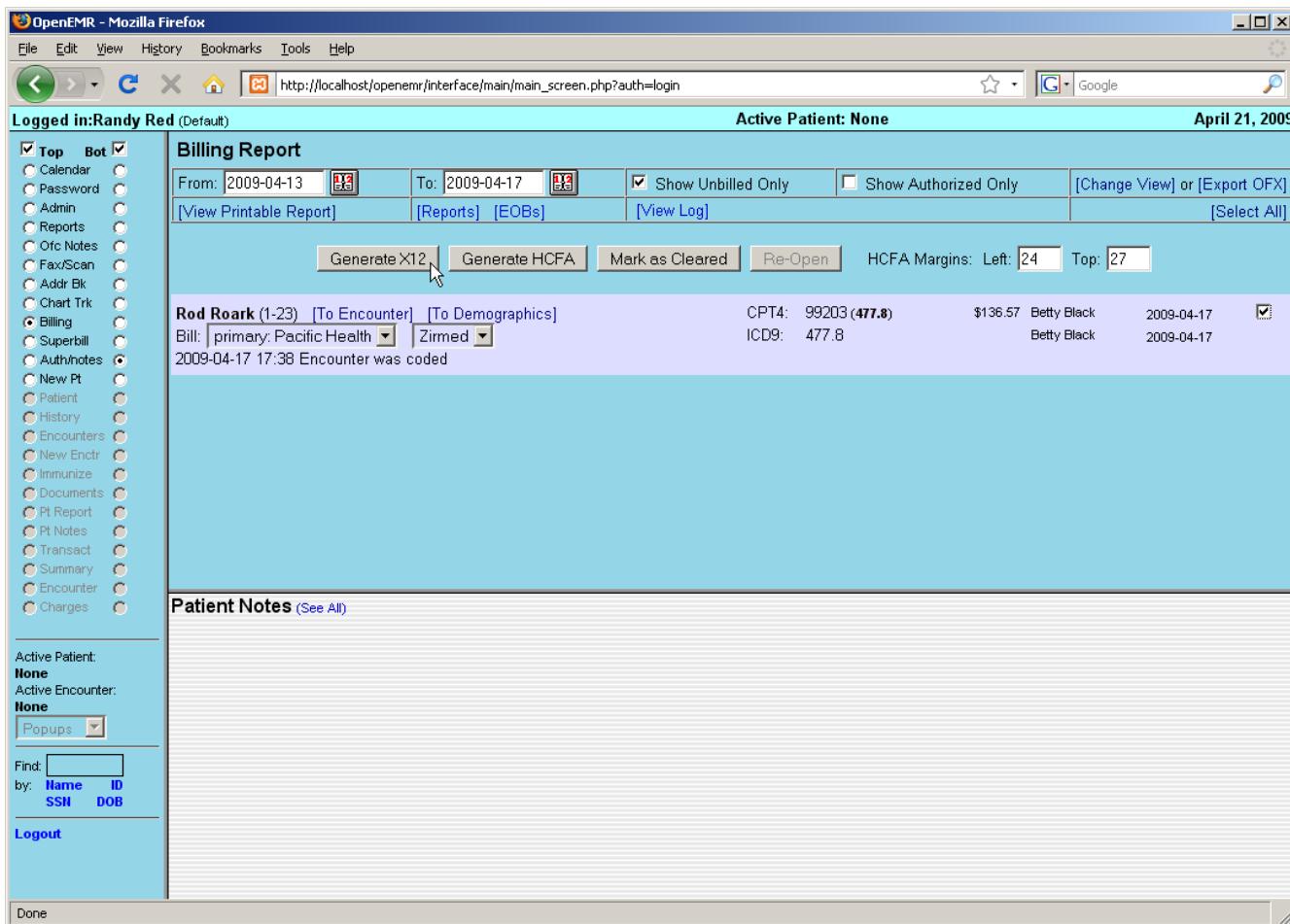
Patient Notes [\(See All\)](#)

Active Patient: **None**  
Active Encounter: **None**  
 Popups

Find:  by:  Name  ID  SSN  DOB

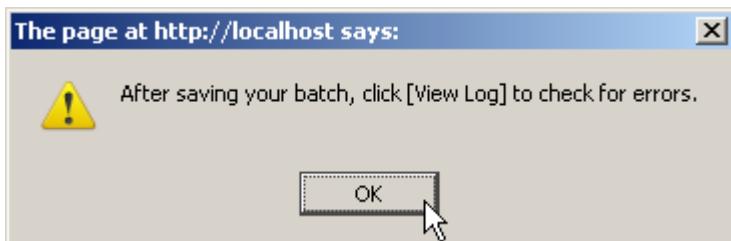
[Logout](#)

Done

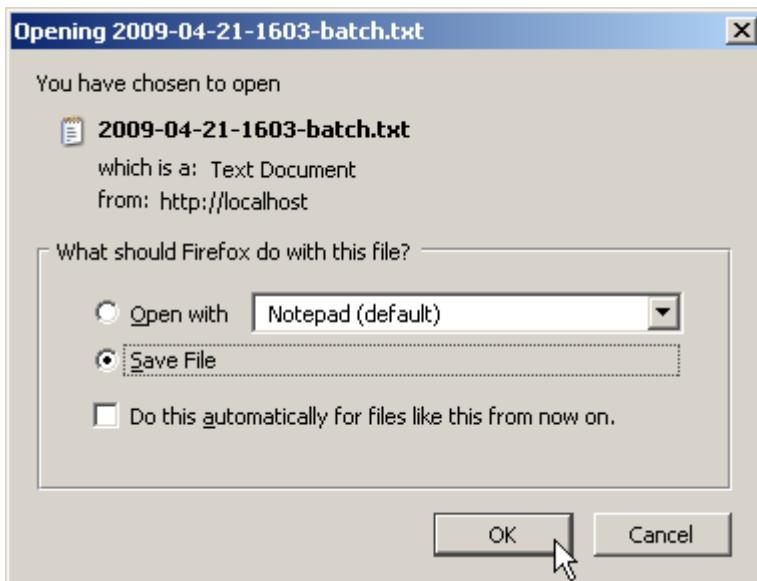


OpenEMR will present you with a confirmation popup, reminding you to check the log file after you have finished generating your claims.

Click 'OK' to proceed.

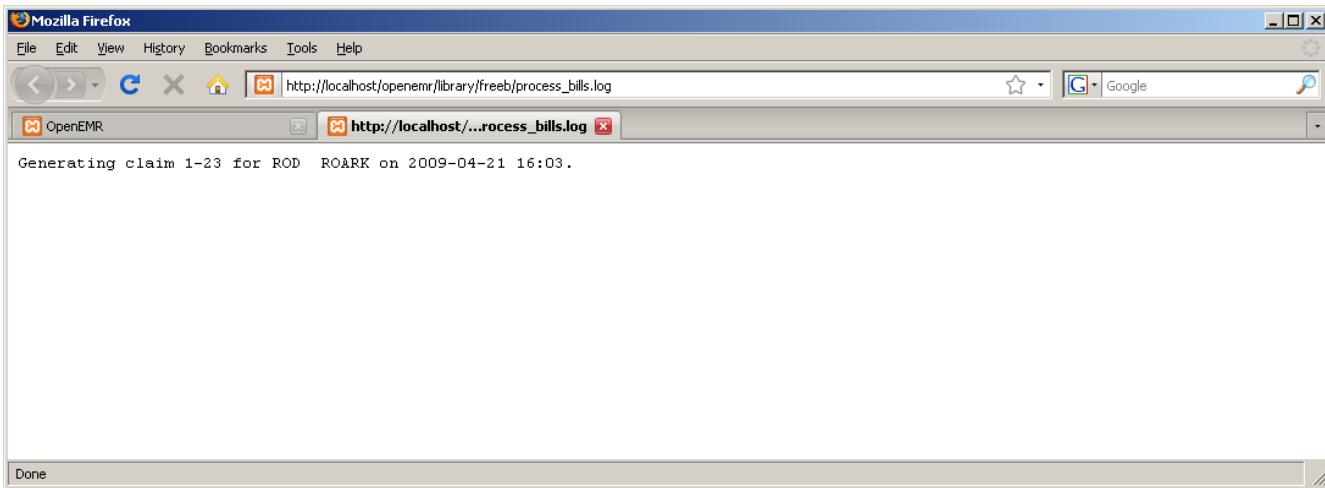


The standard Save File dialog should appear, allowing you to save the generated batch file to your computer.



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.

A screenshot of a Windows Notepad window titled "2009-04-21-1603-batch.txt - Notepad". The file contains a large block of EDI X12 formatted data. The data includes header information like "ISA\*00\* \*00\* \*ZZ\*34567 \*ZZ\*23456", transaction details such as "N00401\*1603\*U\*00401\*020672584\*0\*P\*:~GS\*HC\*34567\*23456\*20090421\*1603\*1\*X\*004010X098A1~ST\*837\*0001~BHT\*0019\*00\*0123\*20090421\*1023\*CH~REF\*87\*004010X098A1~NM1\*41\*2\*YOUR CLINIC NAME HERE\*\*\*\*\*46\*11222222~PER\*IC\*CINDY CYAN\*TE\*5031234567~NM1\*40\*2\*ZIRMED\*\*\*\*46\*12345~HL\*1\*\*20\*1~NM1\*85\*2\*YOUR CLINIC NAME HERE\*\*\*\*\*24\*11222222~NM1\*1234 SW MAIN ST~N4\*PORTLAND\*OR\*97205~NM1\*87\*2\*YOUR CLINIC NAME HERE\*\*\*\*\*24\*11222222~N3\*1234 SW MAIN ST~N4\*PORTLAND\*OR\*97205~HL\*2\*1\*22\*0~SBR\*P\*18\*1234\*NW COMPANY\*\*\*\*\*CI~NM1\*IL\*1\*ROARK\*ROD\*\*\*\*\*MI\*1122334~N3\*321 SW CAPITOL HWY~N4\*PORTLAND\*OR\*97219~DMG\*D8\*20090414\*M~NM1\*PR\*2\*PACIFIC HEALTH\*\*\*\*\*PI\*98765~N3\*2001 E 123RD ST~N4\*PASADENA\*CA\*90059~CLM\*1~ 23\*136.57\*\*\*11:1\*Y\*AY\*Y\*Y\*C~DTP\*431\*D8\*20090417~REF\*X4\*12345678~HI\*BK:4778~NM1\*DN\*1\*BLACK\*BETTY\*\*\*\*34\*111223333~PRV\*RF\*ZZ\*207Q00000X~REF\*1G\*U11111~NM1\*82\*1\*BLACK\*BETTY\*\*\*\*34\*111223333~PRV\*PE\*ZZ\*207Q00000X~NM1\*77\*2\*YOUR CLINIC NAME HERE\*\*\*\*\*24\*11222222~N3\*1234 SW MAIN ST~N4\*PORTLAND\*OR\*97205~LX\*1~SV1\*HC:99203\*136.57\*UN\*1\*\*\*1~DTP\*472\*D8\*20090417~SE\*38\*0001~GE\*1\*1~IEA\*1\*020672584~

Uncheck 'Show Unbilled Only' and click 'Change View' to refresh the billing list and see the updated status of the encounter.

Click 'Mark as Cleared' to indicate that billing has been completed for this encounter.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]  
[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [To Encounter] [To Demographics] CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17  
Bill: primary: Pacific Health Zirmed ICD9: 477.8 Betty Black 2009-04-17  
2009-04-17 17:38 Encounter was coded  
2009-04-21 16:03 Queued for primary standard billing to Pacific Health  
2009-04-21 16:03 Claim was generated to file 2009-04-21-1603-batch.txt

Patient Notes (See All)

Active Patient: None  
Active Encounter: None  
Popups

Find: by: Name ID SSN DOB

Logout Done

The screenshot shows the OpenEMR interface for a user named 'Randy Red'. The main window displays a 'Billing Report' for the period from April 13 to April 17, 2009. A single claim is listed for 'Rod Roark (1-23)'. The claim details are: CPT4: 99203 (477.8), ICD9: 477.8, and it was billed to 'Pacific Health' via 'Zirmed'. The status of the claim is 'Queued for primary standard billing to Pacific Health' on April 21, 2009, at 16:03. The interface includes a sidebar with various menu options like 'Calendar', 'Reports', and 'Charges', and a search bar at the bottom.

You will then be presented with a screen indicating that the claim has been “marked as billed only.”

Click 'Back' to return to the Billing Report page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Blk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  PT Report  PT Notes  Transact  Summary  Encounter  Charges

back  
Claim 1-23 was marked as billed only.

Patient Notes ([See All](#))

Active Patient:  
**None**

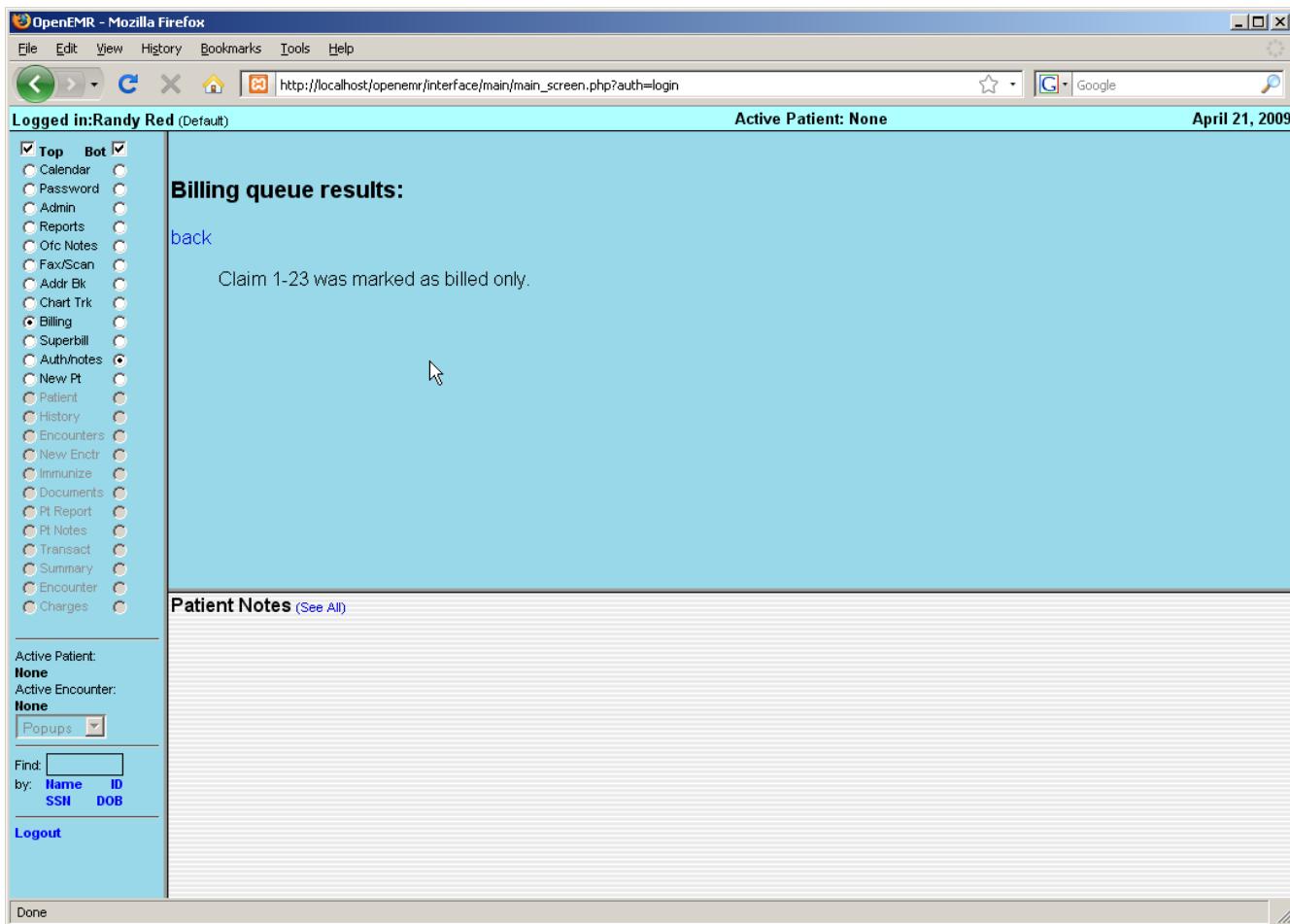
Active Encounter:  
**None**

[Popups](#)

Find:   
by: [Name](#) [ID](#) [SSN](#) [DOB](#)

[Logout](#)

Done



## Generating HCFA Forms

In OpenEMR multiple forms may be generated for each claim.

For example, re-enter the desired date range, uncheck 'Show Unbilled Only' and click 'Change View' 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 HCFA'.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Addr Bk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

**Billing Report**

From: 2009-04-13  To: 2009-04-17  Show Unbilled Only  Show Authorized Only  [Change View] or [Export OFX]

[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (**477.8**) \$136.57 Betty Black 2009-04-17   
Bill: primary: Pacific Health Zirmed ICD9: 477.8 Betty Black 2009-04-17  
2009-04-17 17:38 Encounter was coded  
2009-04-21 16:03 Queued for primary standard billing to Pacific Health  
2009-04-21 16:03 Claim was generated to file [2009-04-21-1603-batch.txt](#)  
2009-04-21 16:06 Marked as cleared

Patient Notes [\(See All\)](#)

Active Patient: **None**  
Active Encounter: **None**  
Popups   
Find:  by:  Name  ID  SSN  DOB

[Logout](#)

Done

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 built-in PDF viewer, or printed automatically on a pre-printed HCFA 1500 form, depending on your system's configuration.

OpenEMR - Mozilla Firefox

File Edit View Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top  Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Blk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Immunize
- Documents
- PT Report
- PT Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient:  
**None**

Active Encounter:  
**None**

Find:   
by:  Name  ID  
 SSN  DOB

[Logout](#)

PACIFIC HEALTH  
2001 E 123RD ST  
PASADENA, CA 90059

X 1122334  
ROARK, ROD 08 06 1985 X ROARK, ROD  
321 SW CAPITOL HWY X 321 SW CAPITOL HWY  
PORTLAND X PORTLAND OR  
97219 503 4567890 X 97219 503 4567890  
1234  
X 04 14 2009 X  
X NW COMPANY  
X PH 70 X

SIGNATURE ON FILE SIGNATURE ON FILE

04 17 2009 1G U11111  
BLACK, BETTY X  
477 8

04 17 09 04 17 09 11 99203 1 136 57 1

112222222 X 1-23 X 136 57 0 00 136 57  
YOUR CLINIC NAME HERE 503 1234567  
1234 SW MAIN ST  
PORTLAND OR 97205  
SIGNATURE ON FILE YOUR CLINIC NAME HERE  
1234 SW MAIN ST  
PORTLAND OR 97205

Returning to the Billing Report, you can see that the status of the billable encounter has been updated.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar  Password  
 Admin  Reports  
 Ofc Notes  Fax/Scan  
 Addr Bk  Chart Trk  
 Billing  Superbill  
 Auth/notes  New Pt  
 Patient  History  
 Encounters  New Enctr  
 Immunize  Documents  
 Pt Report  Pt Notes  
 Transact  Summary  
 Encounter  Charges

**Billing Report**

From: 2009-04-13  To: 2009-04-17   Show Unbilled Only  Show Authorized Only [Change View] or [Export OFX]  
[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

HCFA Margins: Left: 24 Top: 27

Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (**477.8**) \$136.57 Betty Black 2009-04-17  
Bill: primary: Pacific Health Zirmed ICD9: 477.8 Betty Black 2009-04-17

2009-04-17 17:38 Encounter was coded  
2009-04-21 16:03 Queued for primary standard billing to Pacific Health  
2009-04-21 16:03 Claim was generated to file 2009-04-21-1603-batch.txt  
2009-04-21 16:06 Marked as cleared  
2009-04-21 16:09 Queued for primary hcfa billing to Pacific Health  
2009-04-21 16:09 Claim was generated to file 2009-04-21-1609-batch.pdf

Active Patient:  
**None**  
Active Encounter:  
**None**  
[Popups ]  
Find:   
by:  Name  ID  
 SSH  DOB

[Logout](#)

Done

## 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

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The main menu includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL "http://localhost/openemr/interface/main/main\_screen.php?auth=login". The top right corner displays "Active Patient: None" and the date "April 21, 2009". On the left, a navigation menu is open, showing various links such as Top, Bot, Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Add Blk, Chart Trk, Billing, Superbill, Auth/Notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. A sub-menu for "Billing" is selected. The main content area is titled "Billing Report" and contains fields for "From" (2009-04-21) and "To" (empty), checkboxes for "Show Unbilled Only" and "Show Authorized Only", and buttons for "[View Printable Report]", "[Reports]", "[EOBs]", "[View Log]", "Generate X12", "Generate HCFA", "Mark as Cleared", and "Re-Open". It also shows "HCFA Margins: Left: 24 Top: 27". Below these are sections for "Active Patient: None", "Active Encounter: None", and a "Find" field with options for Name, ID, SSN, and DOB. At the bottom are "Logout" and "Done" buttons.

To begin, select '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 screenshot shows the 'EOB Posting - Search' window. At the top, there are search fields for Payer (Pacific Health), Source (12345), Pay Date (2009-04-21), Deposit Date (empty), Amount (\$85.00), and a 'Help' link. Below these are fields for Name, Chart ID, Encounter, Svc Date (2009-04-17), To, and an 'Open' dropdown. A purple bar contains a 'Browse...' button for uploading ERA files. Below the search area are buttons for 'Select All', 'Clear All', 'Print Selected Statements', and a checkbox for 'Without Update'. The status bar at the bottom left says 'Done'.

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 the same 'EOB Posting - Search' window after a search has been performed. The results table lists one invoice for patient 'Roark, Rod' with invoice number '1.23'. The table columns are Patient, Invoice, Svc Date, Last Stmt, Charge, Adjust, Paid, Balance, Prv, and Sel. The 'Prv' column shows a value of '-2'. The status bar at the bottom left says 'Done'.

Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Paid	Balance	Prv	Sel
Roark, Rod	1.23	2009-04-17		136.57			136.57	-2	<input type="checkbox"/>

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.

**EOB Posting - Invoice - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl\_eob\_invoice.php?id=5

OpenEMR EOB Posting - Search EOB Posting - Invoice

Patient: Rod Roark  
 Provider: Betty Black Ins1: Pacific Health  
 Ins2: MedOne  
 Invoice: 1.23  
 Svc Date: 2009-04-17 Done with:  None  Ins1  Ins2  
 Check/EOB No.: 12345  
 Bill Date: 2009-04-17 Now posting for:  Ins1  Ins2  Ins3  Patient  
 Check/EOB Date: 2009-04-21  
 Needs secondary billing   Deposit Date:

Code	Charge	Balance	By/Source	Date	Pay	Adjust	Reason
99203	136.57	136.57			85.00		W

Done

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'.

**EOB Posting - Search - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl\_eob\_search.php

OpenEMR EOB Posting - Search

Payer: MedOne Source: 22334 Pay Date: 2009-04-21 Deposit Date: Amount: 20.00 Help  
 Name: Chart ID: Encounter: Svc Date: 2009-04-17 To: Open   
 Or upload ERA file:

Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Paid	Balance	Prv	Sel
Roark, Rod	1.23	2009-04-17		136.57	0.00	85.00	51.57	-1	<input type="checkbox"/>

Select All Clear All Print Selected Statements  Without Update

Done

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.

EOB Posting - Invoice - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl\_eob\_invoice.php?id=5

OpenEMR EOB Posting - Search EOB Posting - Invoice

Patient: Rod Roark Ins1: Pacific Health  
Provider: Betty Black Ins2: MedOne  
Invoice: 1.23

Svc Date: 2009-04-17 Done with:  None  Ins1  Ins2 Check/EOB No.: 22334  
Bill Date: 2009-04-17 Now posting for:  Ins1  Ins2  Ins3  Patient Check/EOB Date: 2009-04-21  
 Needs secondary billing   Deposit Date:

Code	Charge	Balance	By/Source	Date	Pay	Adjust	Reason
99203	136.57	51.57	Ins1/12345	2009-04-21	85.00	20	16.57 W

Done

A dropdown menu is open over the 'W' button in the table row, listing various adjustment reasons:

- Ins adjust
- Coll w/o
- Pt released
- Sm debt w/o
- To ded'ble
- To copy
- Bad check
- Bad debt
- Discount
- Hardship w/o
- Ins refund
- Pt refund
- Ins overpaid
- Pt overpaid
- Adm adjust
- Untimely filing
- Ins bundling
- After hrs calls

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.

**EOB Posting - Search - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl\_eob\_search.php

**OpenEMR** **EOB Posting - Search**

Payer:	-Patient-	Source:	Pay Date:	Deposit Date:	Amount:	Help		
Name:		Chart ID:		Encounter:		Svc Date:	To:	<input type="button" value="Search"/>
Or upload ERA file: <input type="button" value="Browse..."/>							<input type="button" value="Open"/>	
<input type="button" value="Select All"/> <input type="button" value="Clear All"/> <input type="button" value="Print Selected Statements"/> <input type="checkbox" value="Without Update"/>							<input type="button" value="Open"/> <input type="button" value="Open All"/> <input type="button" value="Due Pt"/> <b>Due Ins</b>	

Done

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.

**EOB Posting - Search - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

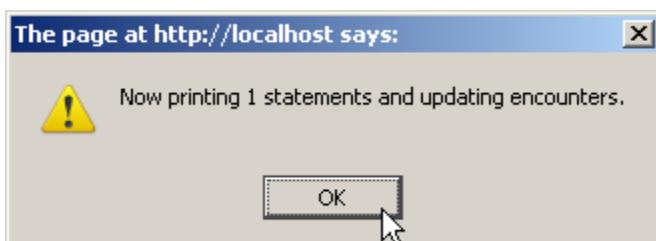
http://localhost/openemr/interface/billing/sl\_eob\_search.php

**OpenEMR** **EOB Posting - Search**

Payer:	-Patient-	Source:	Pay Date:	Deposit Date:	Amount:	Help			
Name:		Chart ID:		Encounter:		Svc Date:	To:	<input type="button" value="Search"/>	
Or upload ERA file: <input type="button" value="Browse..."/>							<input type="button" value="Due Pt"/>		
Patient	Invoice	Svc Date	Last Stmt	Charge	Adjust	Paid	Balance	Prv	Sel
Roark, Rod	1.23	2009-04-17		136.57	16.57	105.00	15.00		<input checked="" type="checkbox"/>
<input type="button" value="Select All"/> <input type="button" value="Clear All"/> <input type="button" value="Print Selected Statements"/> <input type="checkbox" value="Without Update"/>									

Done

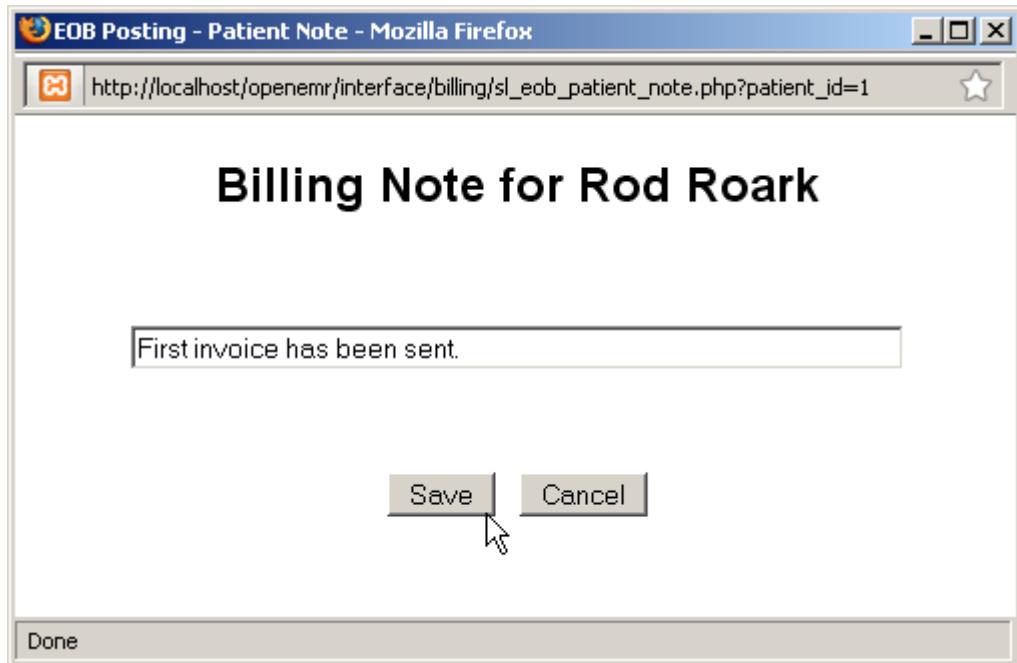
Check the box next to the desired invoice and click 'Print Selected Statements' to generate an invoice for that patient using a customizable template. Depending on your clinic's OpenEMR configuration, the invoice may be printed automatically.



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	2009-04-21		16.57	Ins adjust Ins2
			Ins1/12345	2009-04-21	85.00		
			Ins2/22334	2009-04-21	20.00		
		15.00			15		

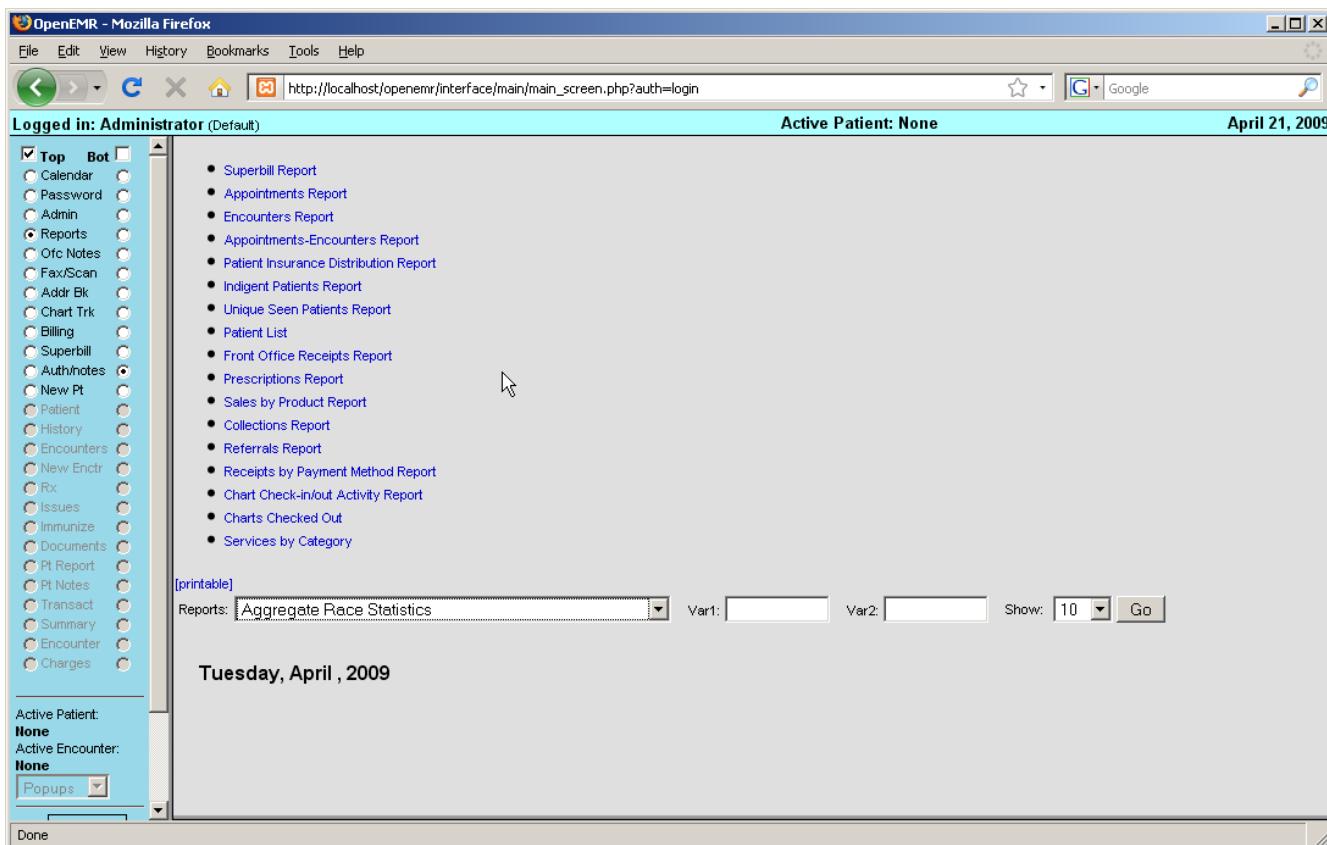
## Reporting

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.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The title bar reads "OpenEMR - Mozilla Firefox". The address bar shows the URL "http://localhost/openemr/interface/main/main\_screen.php?auth=login". The top menu bar includes File, Edit, View, History, Bookmarks, Tools, and Help. A toolbar with various icons is visible above the main content area. On the left, a navigation menu is open under the "Reports" section, listing items like Top, Bot, Calendar, Password, Admin, Reports, and many others. The main content area displays an appointment calendar for "Administrator" on "Tuesday, April 21, 2009". The calendar shows a list of appointments from 8:00 to 12:00, with one entry at 9:30 labeled "IN". Below the calendar, sections for "Patient Notes (See All) and Authorizations (More)" and "Active Patient: None" are visible. A sidebar on the left shows "Active Patient: None" and "Active Encounter: None". The bottom of the window has a "Done" button.

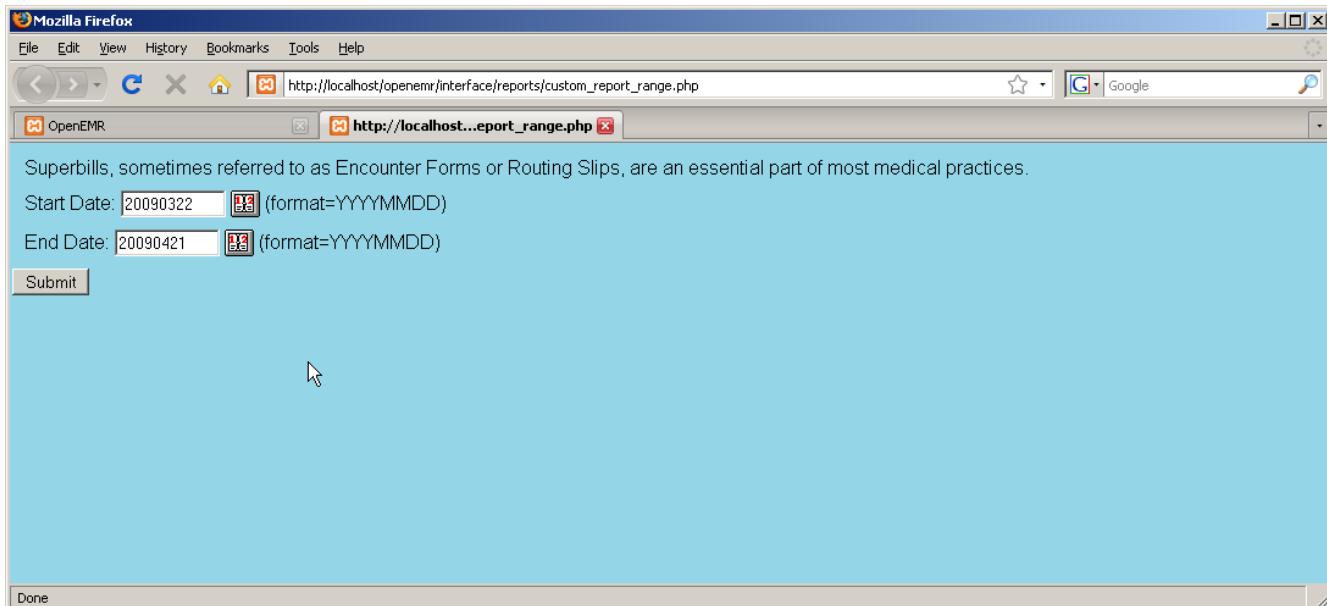
## General Reports

Most general reporting tools can be found by selecting 'Reports' from the navigation menu at left.



Examples of some commonly used reports:

The Superbill Report 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

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/custom\_report\_range.php

OpenEMR http://localhost...eport\_range.php

**Patient Data:**

Title: Mr.	First Name: Rod	Last Name: Roark	Sex: Male	SS: 111-22-3333	Date of Birth: 1985-08-06
Street: 321 SW Capitol Hwy	City: Portland	Zip: 97219	Country: USA	Occupation: Engineer	Home Phone: 503-456-7890
Business Phone: 503-112-3334	Contact Phone: 971-222-3333	Contact Person: Wife	Allows Mail: NO	Allows Voice msgs: YES	Notice Received: YES
Leave Message With: wife					

**Insurance Data:**

**Primary:**

Provider: Pacific Health	Plan Name: PH 7.0	Policy Number: 1122334	Group Number: 1234	Subscriber First Name: Rod	Subscriber Last Name: Roark
Subscriber Relationship: self	Subscriber SS: 111-22-3333	Subscriber Date of Birth: 2009-04-14	Subscriber Phone: 503-456-7890	Subscriber Address: 321 SW Capitol Hwy	Subscriber Zip: 97219
Subscriber City: Portland	Subscriber State: OR	Subscriber Country: USA	Subscriber Employer: NW Company	Subscriber Employer Street: 44566 Industry Way	Subscriber Employer City: Portland
Subscriber Employer Zip: 97002	Subscriber Employer State: OR	Subscriber Employer Country: USA			

**Secondary:**

Provider: MedOne	Plan Name: MedOne Gold	Policy Number: 543216	Group Number: 1112	Subscriber First Name: Rod	Subscriber Last Name: Roark
Subscriber Relationship: self	Subscriber SS: 111-22-3333	Subscriber Date of Birth: 1985-08-06	Subscriber Phone: 503-456-7890	Subscriber Address: 321 SW Capitol Hwy	Subscriber Zip: 97219
Subscriber City: Portland	Subscriber State: USA	Subscriber Country: NW Company	Subscriber Employer: 44566 Industry Way	Subscriber Employer Street: 44566 Industry Way	Subscriber Employer City: Portland
Subscriber Employer Zip: 97002	Subscriber Employer State: OR	Subscriber Employer Country: USA			

Done

As well as the billing codes and amounts.

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/custom\_report\_range.php

OpenEMR http://localhost...eport\_range.php

**Secondary:**

Provider: MedOne	Plan Name: MedOne Gold	Policy Number: 543216	Group Number: 1112	Subscriber First Name: Rod	Subscriber Last Name: Roark
Subscriber Relationship: self	Subscriber SS: 111-22-3333	Subscriber Date of Birth: 1985-08-06	Subscriber Phone: 503-456-7890	Subscriber Address: 321 SW Capitol Hwy	Subscriber Zip: 97219
Subscriber City: Portland	Subscriber State: USA	Subscriber Country: NW Company	Subscriber Employer: 44566 Industry Way	Subscriber Employer Street: 44566 Industry Way	Subscriber Employer City: Portland
Subscriber Employer State: OR	Subscriber Employer Country: USA				

**Tertiary:**

Subscriber SS: Subscriber Date of Birth: 0000-00-00

**Billing Information:**

Date	Provider	Code	Fee
2009-04-17 05:38 pm	Betty Black	CPT4: 99203	136.57
2009-04-17 05:38 pm	Betty Black	ICD9: 477.8 Allergic rhinitis, other allergen	0.00

Sub-Total 136.57  
Paid 0.00  
Total 136.57

Physician Signature: \_\_\_\_\_

Done

The Appointments Report 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.

**Appointments Report - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/appointments\_report.php

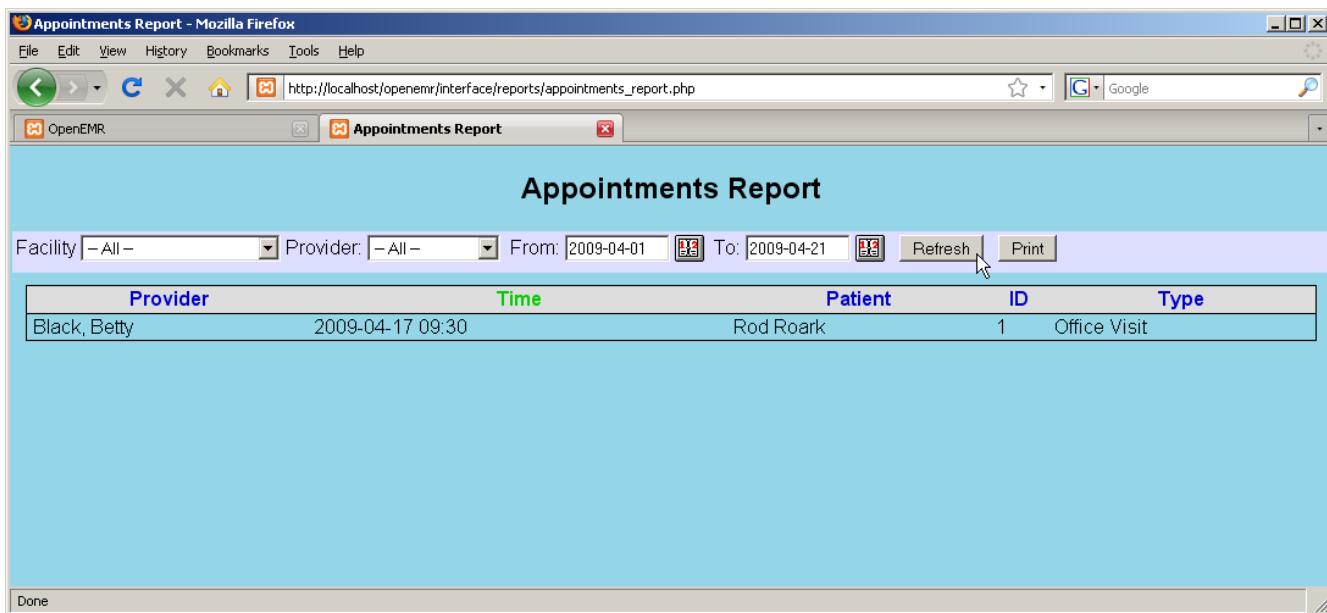
OpenEMR Appointments Report

## Appointments Report

Facility: - All - Provider: - All - From: 2009-04-01 To: 2009-04-21 Refresh Print

Provider	Time	Patient	ID	Type
Black, Betty	2009-04-17 09:30	Rod Roark	1	Office Visit

Done



The Appointments and Encounters Report 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.

**Appointments and Encounters - Mozilla Firefox**

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/appt\_encounter\_report.php

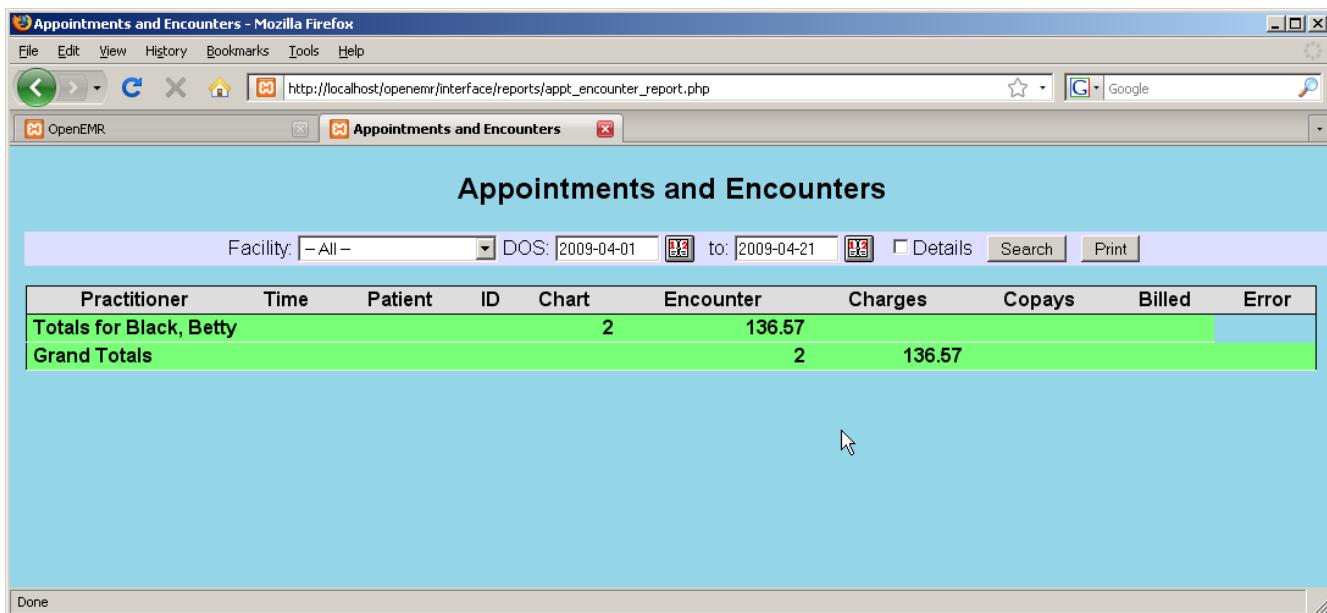
OpenEMR Appointments and Encounters

## Appointments and Encounters

Facility: - All - DOS: 2009-04-01 to: 2009-04-21 Details Search Print

Practitioner	Time	Patient	ID	Chart	Encounter	Charges	Copays	Billed	Error
Totals for Black, Betty				2	136.57				
Grand Totals					2	136.57			

Done



The Insurance Distribution report shows you how many patients seen over a given time period use each kind of insurance.

Patient Insurance Distribution - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/reports/insurance\_allocation\_report.php

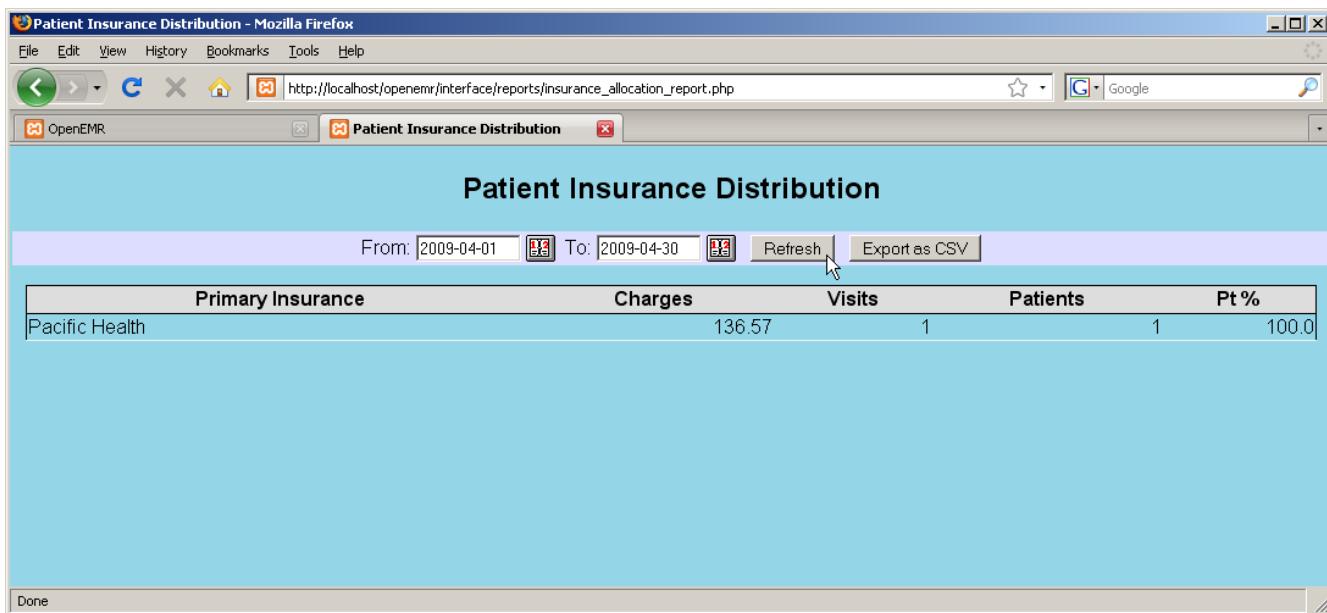
OpenEMR Patient Insurance Distribution

## Patient Insurance Distribution

From: [2009-04-01]  To: [2009-04-30]  Export as CSV

Primary Insurance	Charges	Visits	Patients	Pt %
Pacific Health	136.57	1	1	100.0

Done



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

Indigent Patients Report - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/indigent\_patients\_report.php

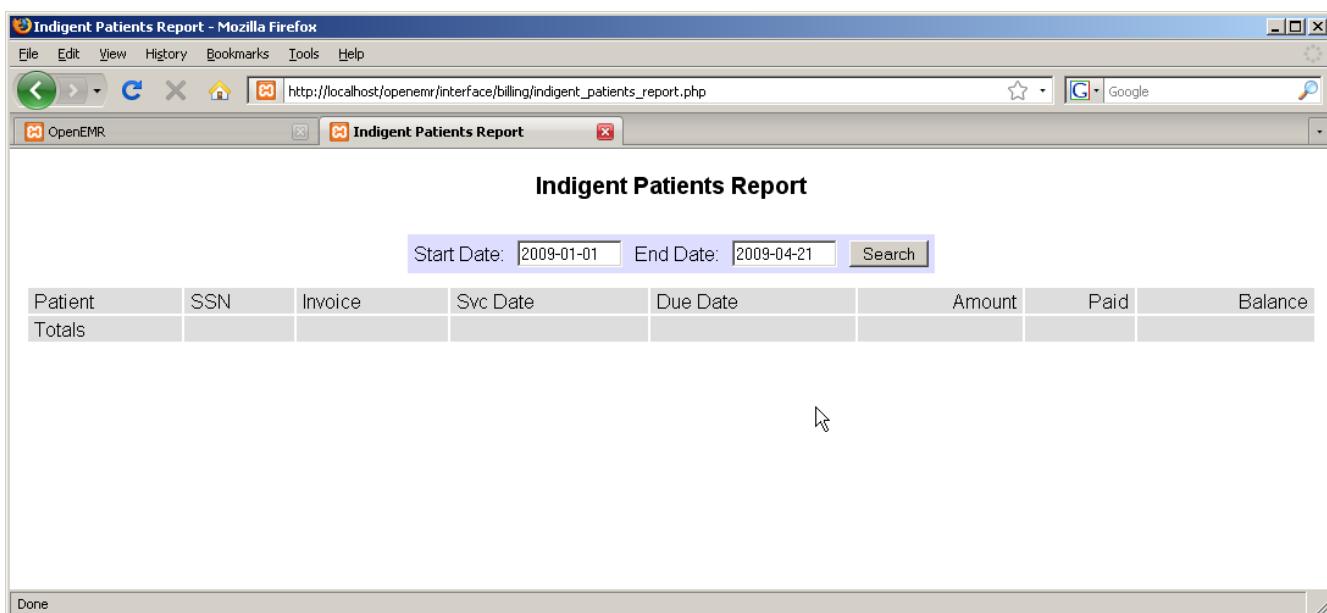
OpenEMR Indigent Patients Report

## Indigent Patients Report

Start Date: [2009-01-01] End Date: [2009-04-21]

Patient	SSN	Invoice	Svc Date	Due Date	Amount	Paid	Balance
Totals							

Done



OpenEMR also allows you to create custom reports using the Database Reporting section of Administration. Some examples have been included by default.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Superbill Report Appointments Report Encounters Report Appointments-Encounters Report Patient Insurance Distribution Report Indigent Patients Report Unique Seen Patients Report Patient List Front Office Receipts Report Prescriptions Report Sales by Product Report Collections Report Referrals Report Receipts by Payment Method Report Chart Check-in/out Activity Report Charts Checked Out Services by Category

[printable]

Reports: Aggregate Race Statistics Var1: Var2: Show: 10 Go

Aggregate Race Statistics  
Appointments By Race/Ethnicity from today plus interval  
Tue Count No Shows By Provider since Interval ago  
Search by Code

Active Patient: None  
Active Encounter: None  
Popups

Done

This screenshot shows the OpenEMR interface in Mozilla Firefox. The top navigation bar includes File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL http://localhost/openemr/interface/main/main\_screen.php?auth=login. The title bar indicates 'Logged in: Administrator (Default)' and the date 'April 21, 2009'. On the left, a sidebar lists various modules: Calendar, Password, Admin, Reports (which is selected), Ofc Notes, Fax/Scan, Addr Blk, Chart Trk, Billing, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges. The 'Reports' module is expanded, displaying a list of reports such as Superbill Report, Appointments Report, Encounters Report, and so on. Below this is a '[printable]' section with a dropdown menu for 'Reports: Aggregate Race Statistics'. The dropdown shows 'Aggregate Race Statistics' and 'Appointments By Race/Ethnicity from today plus interval'. A specific report entry for 'Tue Count No Shows By Provider since Interval ago' is highlighted. Other buttons in this section include 'Var1:', 'Var2:', 'Show: 10', and 'Go'. At the bottom of the sidebar, 'Active Patient' and 'Active Encounter' fields are set to 'None', and there is a 'Popups' dropdown. The bottom of the page has a 'Done' button and a JavaScript link: javascript:void window.open('sl\_receipts\_report.php').

## Billing Reports

From the main Billing page select 'Reports'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 21, 2009

Top  Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Blk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

**Billing Report**

From: 2009-04-21 To:     Show Unbilled Only  Show Authorized Only [Change View] or [Export OFX]

[View Printable Report]    [Select All]

HCFA Margins: Left: 24 Top: 27

Active Patient: None  
Active Encounter: None  
Popups

javascript:void window.open('sl\_receipts\_report.php')

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

The screenshot shows a web browser window titled "Cash Receipts by Provider - Mozilla Firefox". The URL is [http://localhost/openemr/interface/billing/sl\\_receipts\\_report.php](http://localhost/openemr/interface/billing/sl_receipts_report.php). The page title is "Cash Receipts by Provider". At the top, there are dropdown menus for "All Facilities" and "All Providers", a "Payment Date" selector, and date fields for "From: 2009-04-01" and "To: 2009-04-30". There are also checkboxes for "CPT", "ICD", "Details", and "Procedures". Below these are "Refresh" and "Print" buttons. The main content area displays a table with columns "Practitioner", "Date", and "Received". The data shows a single entry for "Totals for Betty Black" with a value of "120.00", and a "Grand Totals" row with a value of "120.00". A "Done" button is at the bottom right.

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

The screenshot shows the same web browser window with the "Details" and "Procedures" checkboxes checked. The main content area now displays a detailed table with columns "Practitioner", "Date", "Invoice", "Procedure", "Prof", and "Clinic". The data shows three entries for "Betty Black" on different dates (2009-04-21, 2009-04-21, 2009-04-28) with corresponding invoice numbers (1.23), procedures (99203), and amounts (85.00, 20.00, 15.00). A "Totals for Betty Black" row shows a total of "120.00", and a "Grand Totals" row shows a total of "120.00". A "Done" button is at the bottom right.

## 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 'Pt Report' which is now visible in the navigation menu.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

**Demographics** (More) (Delete)

**Who**

Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333

External ID: 1  
Sex: Male  
License/ID: 1234567

**Balance Due: \$0.00**

Upcoming Appointments  
New Appointment

**Contact**

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

**Choices**

**Medical Problems** (More)  
bronchitis

**Allergies** (More)  
penicillin

**Medications** (More)  
Claritin D

**Immunizations** (More)  
2009-04-21 - DT 1

**Prescriptions**  
Claritin D 1 in tablet q.d.

**Notes** (More)

Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Find: r  
by: Name ID  
SSN DOB

Logout

Done

This screenshot shows the OpenEMR interface for a patient named Rod Roark. The top navigation bar includes links for File, Edit, View, History, Bookmarks, Tools, and Help. The address bar shows the URL http://localhost/openemr/interface/main/main\_screen.php?auth=login. The main content area displays the patient's demographic information, including name, date of birth, sex, and external ID. It also shows contact details like address, city, state, and phone numbers. Below this, sections for medical problems, allergies, medications, and immunizations are listed. A notes section contains an insurance entry. On the left, a sidebar lists various medical and administrative categories with checkboxes. At the bottom, there are buttons for Logout and Done.

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

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

**Patient Report** [Check All] [Clear All]

Top  Bot

Calendar  Password  Admin  Reports  Ofc Notes  Fax/Scan  Add Bk  Chart Trk  Billing  Superbill  Auth/notes  New Pt  Patient  History  Encounters  New Enctr  Rx  Issues  Immunize  Documents  Pt Report  Pt Notes  Transact  Summary  Encounter  Charges

Demographics  Immunizations  
 History  Patient Notes  
 Insurance  Transactions  
 Billing  Communications

**Generate Report**

**Issues:**

**Encounters & Forms:**

cough & chest conges ... (2009-04-17)

**Allergies**

penicillin 2009-01-01 Active  Reminded 4/10 5PM (2009-04-17)

**Medical Problems**

bronchitis 2009-04-17 Active  SOAP

**Medications**

Claritin D 2009-04-17 Active

**Documents:**

Name: insurance\_card.jpg  
 Insurance Card Name: insurance\_card.jpg.1

**Generate Report**

This screenshot shows the OpenEMR interface for generating a patient report. The top navigation bar and address bar are identical to the previous screenshot. The main content area features a 'Patient Report' section with checkboxes for various categories of information. Below this, sections for issues, encounters, allergies, medical problems, medications, and documents are displayed, each with their own set of checkboxes. There are two 'Generate Report' buttons, one for each section. On the left, a sidebar lists the same medical and administrative categories as the previous screenshot. At the bottom, there are buttons for Logout and Done.

This produces a report including all the specified patient information.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

**Patient Report (Back)**

[Printable Version]

---

**Patient Data:**

**Who**

Name: Mr. Rod Roark  
DOB: 1985-08-06  
S.S.: 111-22-3333

External ID: 1  
Sex: Male  
License/ID: 1234567

Marital Status: Married

**Contact**

Address: 321 SW Capitol Hwy  
State:  
Country: USA

City: Portland  
Postal Code: 97219

Emergency Contact: Wife

Emergency Phone: 971-222-3333  
Work Phone: 503-112-3334  
Contact Email: mr.rod@gmail.com

Home Phone: 503-456-7890  
Mobile Phone: 971-564-7896

**Choices**

Provider: Betty Black

**HIPAA Notice Received:** YES **Allow Voice Message:** YES

**Employer**

Allow Mail Message: NO **Allow SMS:** NO

Allow Email: YES Occupation: Engineer

Employer Address: 44566 Indusry Way  
State: OR

City: Portland  
Postal Code: 97002

Country: USA

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Done

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

**Billing Information:**

2009-04-17 : (CPT4) 99203 -  
2009-04-17 : (ICD9) 477.8 - Allergic rhinitis, other allergen

---

**Patient Immunization:**

2009-04-21 - DT 1

---

**Patient Notes:**

2009-04-21: 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

---

**Patient Transactions:**

2009-04-21:(Referral) See Dr. Green for lesion on scalp.  
2009-04-21:(Physician Request) request pre-authorization for air filtration system in patient home.

---

**Issues**

**Allergies:**  
penicillin:

**Medical Problems:**  
bronchitis:  
[Diagnosis]  
ICD9:477.8: Allergic rhinitis, other allergen

---

**New Patient Encounter**

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups

Done

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main\_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Top  Bot

Calendar  Password  
 Admin  Reports  
 Ofc Notes  Fax/Scan  
 Addr Bk  Chart Trk  
 Billing  Superbill  
 Auth/notes  New Pt  
 Patient  History  
 Encounters  New Enctr  
 Rx  Issues  
 Immunize  Documents  
 Pt Report  Pt Notes  
 Transect  Summary  
 Encounter  Charges

New Patient Encounter  
(2009-04-17) Provider: Betty Black  
Reason: cough & chest congestion  
Facility:  
Procedure: 99203

**SOAP**  
(2009-04-17)  
**Subjective:** subjective description goes here  
**Objective:** clinical observations go here  
**Assessment:** doctor's assessment goes here  
**Plan:** patient's treatment plan goes here

---

Document 'insurance\_card.jpg'

INSURANCE COMPANY NAME  COVERAGE TYPE

MEMBER NAME: JOHN DOE MEMBER NUMBER: XXX-XX-XXXX EFFECTIVE DATE: XX-XX-XXXX

GROUP #: XXXXX-XXX-XXX PRESCRIPTION GROUP #: XXXXX

PCP CO-PAY: \$15.00 SPECIALIST CO-PAY: \$25.00 PRESCRIPTION CO-PAY: \$15 GENERIC  
EMER. ROOM CO-PAY: \$75.00 \$20 NAME BRAND

Active Patient: Rod Roark (1)  
Active Encounter: None  
Popups