

PROCESS DESCRIPTION VERSION 4.0 (June 2010)

POSSIBLE ROLES: RECEPTIONIST/CASHIER/COUNSELLOR

PROCESS 1.1.1: CREATING A non-duplicate NEW OpenEMR RECORD

#	Step	Observations	Menu options or screen information																								
0	Preliminary steps: Field parameters (UOR and Options) have to be predefined with the Administration > Layout function, which requires system administration access rights	Avoiding client record duplication is a unique OpenEMR feature that ensures data quality through logic relations and onscreen support	Note: This procedure to avoid record duplication is available from OpenEMR version 3.1.1.7 onward. Please check with your system admin about system version and preliminary steps																								
1	Define field parameters (UOR and Options Columns): R: Field is mandatory to create client record N: Field is shown in New Client Form and in Search pop-up window D: Field is used to Search existing records	<table border="1"> <tr> <td>Sample Demographic layout fields</td> <td>R (Required) (Mandatory field to create the record)</td> <td>N (New client form) Field shown in search result pop-up window & in New Client Form</td> <td>D (duplicate check) Field used to search existing client record</td> </tr> <tr> <td>TITLE</td> <td>✓</td> <td>✓</td> <td>X</td> </tr> <tr> <td>FIRST NAME</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>LAST NAME</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>CLIENT ID</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>ADDRESS</td> <td>X</td> <td>✓</td> <td>✓</td> </tr> </table>	Sample Demographic layout fields	R (Required) (Mandatory field to create the record)	N (New client form) Field shown in search result pop-up window & in New Client Form	D (duplicate check) Field used to search existing client record	TITLE	✓	✓	X	FIRST NAME	✓	✓	✓	LAST NAME	✓	✓	✓	CLIENT ID	✓	✓	✓	ADDRESS	X	✓	✓	Best practices: Analyze these definitions in a group discussion and complete the spreadsheet before changing the layout in OpenEMR. Document changes!
Sample Demographic layout fields	R (Required) (Mandatory field to create the record)	N (New client form) Field shown in search result pop-up window & in New Client Form	D (duplicate check) Field used to search existing client record																								
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FIRST NAME	✓	✓	✓																								
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CLIENT ID	✓	✓	✓																								
ADDRESS	X	✓	✓																								
2	Enter field parameters in Edit Layout page (See Process Guideline on Layouts). In the example, Option Column fields of Demographic layout are highlighted in figure		Note: These parameters are the new basis for Add/Search record features. It is rather flexible and can be adapted to different clinic settings																								
3	Example: Review effect in some fields: Title: Required / N First name (fname): Required/ CDN Address (street): Optional / CDN	<ul style="list-style-type: none"> Title & First Name are (R) mandatory, so they must be filled out in record creation page Address is not required for record creation Title field will not be used as a search criterion (does not have Option 'D') First Name & Address will both be used as Search fields (Option 'D') All fields will be displayed in the New client form 																									
4	Creating a new client record: This section extends the discussion found in Guideline 1-1-0 Creating a new OpenEMR record. Fields highlighted in red are those defined as Required (R) and Duplicate Check (D) in layout. In the example, Mrs. Edith Castro's record is being created		Labels shown in red are mandatory fields (Required). All other fields can be left blank at record creation. Select 'Confirm Create New Patient' button																								
5	Verifying Search Pop-up window OpenEMR will perform a search based on all fields with a 'D' in Layout Options column																										
6	Confirming/Rejecting New Patient creation Based on the table above, a system user (usually a receptionist or counsellor) will be able to discriminate among existing users and the 'new' user, and either select: Confirm Create New Patient ...or close the pop-up window and modify or complete client data to better differentiate her/his identity, before creating the record.	The system shows all matches, sorted in ascending order of number of hits (first column). In this example, the system found two existing records containing at least three searchable fields (First Name, Last Name and DOB). The system found the following matches: <ul style="list-style-type: none"> 3 matches: One record w/ First Name <i>Edith</i>, Last name <i>Castro</i> and DOB <i>1980-01-01</i> 3 matches: One record w/ First Name <i>Edith</i>, DOB <i>19080-01-01</i> and Mother's name <i>ana</i> 2 matches: Two records w/same First and Last Name <i>Edith Castro</i>, etc. The most probable decision in this case, is that the first record (client with same name and same date of birth) is already registered. The receptionist can still verify additional discriminatory data like address, home phone or mother's name, which were not available in the first place.																									
7	Automatic rejection of key field Note that Client ID is a unique field that cannot be duplicated. If by mistake a Client ID is repeated, the Non-duplicate feature will display a warning and will not allow client creation (even if all other fields are unique). Client ID will have to be adjusted. Note: Please verify recommended structured code format YYYY-MM-DD/NNN (Year-Month-Day/Sequential Number)																										