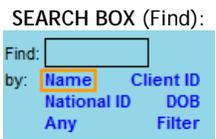
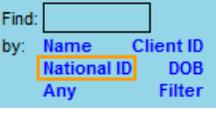
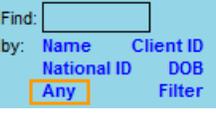
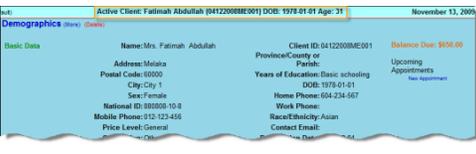


PROCESS DESCRIPTION - VERSION 4.0 (June 2010)

POSSIBLE ROLES: RECEPTIONIST / CASHIER / DATA CLERK | PROCESS 1.2.0: FINDING AN EXISTING OpenEMR RECORD

#	Step	Observations	Menu options or screen information
0	<p>Preliminary steps: Existing client records will be progressively entered. Therefore, all existing and new clients will eventually need a new record to be created for them. (Please do not confuse new OpenEMR record with new client to the clinic).</p>	<p>Each clinic should decide how many months/years of existing clinic files they will enter into the system. Depending on resources and time, entering one or two years of historic files can be reasonable.</p>	<p>Note: When a clinic starts using an EMR system, a criterion must be set to manage client records (ID and dates) for both new clients, and for subsequent clients having pre-existing records</p>
1	<p>General search:</p> <p>By typing some text (the search string) in the search box and pressing enter, last names containing the search string will be returned.</p> <p>Recommendation: type first 3 letters of last name and then select Name. This will produce a list of clients having those 3 first letters in their last name. You can select the client from this short list</p>	<p>If the search string begins with a lower case letter, names containing the search string anywhere in the last name will be returned. If the string starts with a capital letter, last names which begin with the search string will be returned.</p> <p>To search for a string in a first name, use the rules described so far, but place a comma before the search string.</p>	<p>Hint: Do not try to enter the exact name because any error could make you think the client is not registered. It is safer to use part of the name to find the record.</p> 
2	<p>Finding a client by ID Number Enter the ID number in the Search box and select the ID link. A list with all clients starting with that ID number. Eg. a number 12 will retrieve clients with the number 12, 120, 121...</p>	<p>Alternative search method</p>	
3	<p>Finding a client by National ID Number Enter the National ID Number (if any) in the Search box and select the National ID link. The client with that particular ID will be displayed.</p>	<p>Alternative search method</p>	
4	<p>Finding a client by Date of Birth Number Enter the DOB (yyyy/mm/dd) in the Search box and select the DOB link. The client with that Date of Birth will be displayed.</p>	<p>Alternative search method</p>	
5	<p>Finding a client by Any criteria Simply select the Any link and the first 100 clients will be displayed. Note that when you have more than 100 clients in the list, you will need to use the forward (>>) or backward (<<) arrows to see more clients.</p>	<p>Alternative search method</p> 	
5	<p>Selecting (activating) a client Once the search has been completed, you should be able to locate the client data in a client list on the top of the page.</p>	<p>Select her/his name and this client will become "active" (i.e. all processes will be related to this client until you activate a different one)</p>	
6	<p>Active client monitoring checkpoints You will be able to verify and make always sure you are working with the right client by looking at the client monitoring checkpoints, located above the search box (left column) or at the top of the screen:</p>		
7	<p>Advance search for an existing OpenEMR record (see corresponding Guide)</p>	<p>An advanced search is available from OpenEMR version 3.1.1.7 onward</p>	<p>See also Guide on Layout Basics in System Administration</p>