PROCESS DESCRIPTION VERSION 4.0 (June 2010)

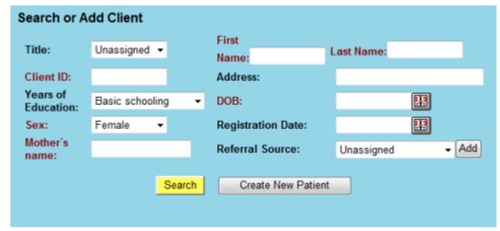
POSSIBLE ROLES: RECEPTIONIST/CASHIER/COUNSELLOR	**PROCESS 1.1.0: CREATING A NEW OpenEMR RECORD**

<table>
<tr><th>#</th><th>Step</th><th>Observations</th><th>Menu options or screen information</th></tr>
<tr><td>0</td><td>Preliminary steps: Existing client records, along with new records, will have to be progressively entered. Therefore, all existing (active) clients will eventually need a new record to be created for them.</td><td>Please do not confuse new OpenEMR record (a new digital record for an old or new client), with new client to the clinic (a person visiting the client for the first time)</td><td>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</td></tr>
<tr><td>1</td><td>Display New OpenEMR record screen:

Menu options:
Client > Client Mgmt > New Record

Warning: if a client already exists in the system (i.e. she/he has a client record) do not create a duplicate record.

Hint: If the client visiting the clinic is not new (she/he has an existing client file), try to find her/him in the system (See Guide on Creating a non-duplicate new record). If the client record has not been created, then proceed with this record creation process.</td><td>

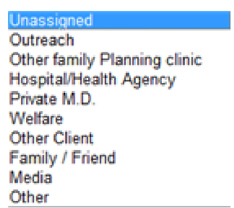
Option to create a new client record for a new or old client</td><td>
</td></tr>
<tr><td>2</td><td>Fill out the BASIC Data form with all mandatory (*) fields:

Title
First Name (*)
Middle Name (if any)
Last Name (*)
Sex (*)
Referral Source
Birth Date (*)
Registration Date (*) (if already has a physical file, then take Date of First Visit date from existing physical Record)
Client Number: (try to use a structured code)

We strongly recommend a client code with a <u>structured</u> format. For example:
YYYY-MM-DD/NNN
(Year-Month-Day/Sequential Number)</td><td>For a definition of mandatory fields, see Guide on Layout Basics.

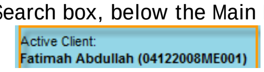
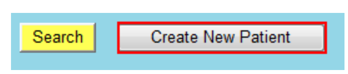
For the Referral Source field (optional) please select source from drop down menu (this list can be configured according to the Association's needs)

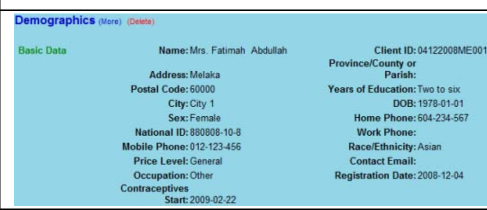
<u>Example of referral sources</u>:

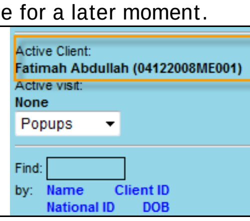
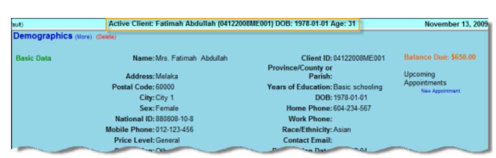

</td><td>Note: For date fields you can use a calendar function or type in the date directly

Note:

double arrows (<< >>) change year
single arrows (< >) change month
down arrows (v) show month/year drop-down menus
</td></tr>
<tr><td>3</td><td>Select Create button

The client whose electronic record you have just created becomes the "active" client (i.e. all processes will be related to this client until you activate a different one)</td><td>Client name and ID are displayed in the Search box, below the Main Menu:

</td><td>
</td></tr>
<tr><td>4</td><td>A basic Demographic profile is automatically created and displayed on the Top Screen section.

Hint: these <u>additional</u> demographic data can be entered either at reception, during counseling or at any other moment, even after the client has left the clinic</td><td>Depending on clinic requirements, the system user can continue entering data into the client demographic profile (More), or continue with the registration process (i.e. create a new visit and produce a blank tally sheet), leaving the completion of the client profile for a later moment.</td><td>
</td></tr>
<tr><td>6</td><td>Active client monitoring checkpoints

You will always be able to verify and make 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:</td><td>
</td><td></td></tr>
</table>