PROCESS DESCRIPTION VERSION 4.0 (June 2010)

POSSIBLE ROLES: RECEPTIONIST/CASHIER/COUNSELLOR | PROCESS 1.2.1: Advanced search of an existing OpenEMR RECORD

#	Stop	Observations	Monu ontions or scroop information
0	Preliminary steps: Field parameters (UOR and Options) have to be predefined with the Administration > Layout function, which requires system administration access rights	The same mechanism used to avoid client record duplication can be used for an Advanced Search during client record creation	Note: This procedure for advanced search 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	Sample R (Required) N (New client form) Demographic (Mandatory field Field shown in search layout fields to create the record) Field shown in search TITLE * TREST NAME CLIERT ID ADDRESS X	D (duplicate check) Best practices: Analyze these definitions in a group discussion and complete the spreadsheet before changing the layout in OpenEMR. Document changes!
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	Basic Data Add Field Rename Group Delete Group Order D(7) Label(7) UOR Data Type 1 Title Offon Lato (7) UOR Data Type 2 Iname First Name Required - Textbox 3 Iname Last Name Required - Textbox 4 pubpid Olient ID Required - Textbox 6 isreet Address Optional - List box 7 DOB DOB Required - Textbox 8 isex Sec Required - List box 9 regdate Registration Date Optional - List box 10 useriest2 Mother's name Required - Textbox Other Information Add Field Rename Group Detete Gr Other Information Add Field Referral Source Optional - List box No	Move Up Move Down a Size List Label Cols Data Cols Options Description - 10 1 N Title Title - 10 1 0 CDN Last Name-* - 10 1 DN External Identifier-* - 25 1 1 N Years of shouter-* - userist2 1 1 N Bate of Beth-* - 15 1 1 DN Start Date at This Clinic - 15 1 1 DN Mother's name-* oup More Up More Down Exet Cols Default Cols Default Value Description
3	Review of fields defined as search criteria Both duplicate-check ('D') fields and mandatory ('R') fields are eligible as search criteria. Left-clicking a field marks it as search criterion	Title: Unassigned - Cleat ID: Address: Varian of Elevation: Interate Interate DOIS Soc: Male - Maller + Roberts Socric: Unassigned - Ad Beards Create New Patient	All Cardinal Control of the second se
4	Example: Mrs. Donna Burton visited the clinic six months ago and she was registered then. She comes today asking for a gynecological consultation. She does not remember her ID. The receptionist simply selects the yellow Search Button	Title: Unassigned First Name: Last Name; Cleare Of Elevation: Basic Schooling 0000: 000: Sec: Finals - Registration Date: 000: Mother's name: Referral Source: Unassigned • Accession	Name Phone 55 DOI 0 Address New Additional 04/02/1075 2009/0-11:0-1 24 Willips Road Famale 04/02/1075 2009/0-11:0-1 24 Willips Road Famale Additional 06/02/1075 2009/0-11:0-1 24 Willips Road Famale Permite Additional 06/02/1075 2009/0-11:0-1 24 Willips Road Famale Permite Additional 06/02/10710000 Permite Permite Addition 02/02/105/2000/0-1:0002 Mate Addition 02/02/105/2000/0-1:002 Mate Matter 02/02/105/2000/0-1:002 Eamale With no search criterion specified, a list of all clients is produced
5	To exemplify a <u>progressive</u> search (which may not be the best practice), the receptionist enters just the client's name: Donna. Note that left-clicking on a field includes it in the search (& yellow-marks it) and the resulting list is reduced	Tele: Unassigned • First Name:Dona Last Name: CleerD: Address: Address: Sec: First Name: Sec: Sec: Sec: Sec: First Name: Sec:	Name Name <th< td=""></th<>
6	By left-clicking on the Sex field (and yellow- marking it) it is now included in the search, so the resulting list is further reduced	Title: Unassigned • First Name:Doma Last Name: Clent ID: Address: Address: Yaars of Education: Basic schooling • DOR: ED Sex: Famale • Registration Date: ED Bother's name: Referat Source: Unassigned • Address:	Name Phone D5 D08 IO Address Sex Button, Dona 224408-511 6522412022 8402/17/20 12 Moon Street Famale Bummen, Dona 202408-511 6522412022 8402/17/20 12 Moon Street Famale B0 Only clients whose first name is Donna and sex is male are displayed Sex
7	By entering both the first and last name, the exact client's name is displayed	Title: Unassigned • First Name:Dona Last Name:Purton Cleast D: Address: Address: Variant of Generation: Butter States Yaars of Generation: Penule • Registration Date: Bitter States Bitter States Robert's name: Reference Date: Date: Bitter States Feaster States	Name Phase 55 DOB IO Address Sex Button. Donna 224-686.611 6522412022 0402/1970 12 Moon Street Female so Specific client is displayed only
8	In all the above cases by clicking on the appropriate client name in the resulting list, will direct the user to the client electronic record, activating it to begin the corresponding visit cycle	Demographics areas (association) Institution and a second	Name Phone 9 3 COR C Address Ps. deuts. Down 2014 00.511 55221/2022 04521150 / 2006 0212 Make Penals Bimgan. Down 2014 00.511 05221/2022 0000 0000 2000 0212 Make Summers. Down 0010 0000 2005 0212 Make Pamale Viet, Down 0010 0000 2005 0212 Make Pamale Viet, Down 0010 0000 28 Pamale Pamale Selecting client in search list will activate her/his existing record Pamale Pamale Pamale