PROCESS DESCRIPTION – VERSION 4.0 (June 2010)

POSSIBLE ROLES: RECEPTIONIST / CASHIER / COUNSELLOR	PROCESS 1.3.0: CREATING A VISIT

#	Step	Observations	Menu options or screen information
0	**Preliminary steps**: A visit is always associated to an existing ACTIVE OpenEMR client record, so first Find an existing client record (Guide 1.2.0) or create a new OpenEMR record (Guide 1.1.0)	**Note**: The process described here focuses on the **Visit Form** and corresponds to the event in which a client goes to the clinic and receives one or more services/products. This is not to be confused with the **Visit as a whole**, which includes the creation of this form, a Tally Sheet (serv/prod control), the Checkout (billing process), and optional Visit Forms (to collect especial additional data)	Client Management New Current
1	In order to create a new visit, select **Menu options:** Client > Visits > New Visit A New Visit Form is displayed	**New Visit Form** **Consultation Brief Description:**	Visits Calendar New Visit
2	**Add Consultation Brief Description**	Write description (reason of visit) in the open text field	**Consultation Brief Description:**
3	**Select Visit Category** from pull-down menu	1 Admission: First time client visits clinic 2 Re-visit: Subsequent visit requiring services 3 Counseling Only: (no other service required) 4 Supply/Re-supply: Purchasing products only 5 Administrative: eg. payment, info request 6 Referral INBOUND: Referred from a partner clinic	1 Admission 2 Re-visit 3 Counseling Only 4 Supply/Re-Supply 5 Administrative 6 Referral INBOUND
4	**Select Facility** **Hint:** A 'facility' can be the clinic as a whole or a cost center within a clinic	An appropriate clinic should be pre-defined (The facility is the place/area where the client is assisted; this can also be interpreted as a major cost center within the clinic)	First Clinic IPPF St. Thomas Clinic
5	**Select Sensitivity** (degree of information confidentiality)	High level will block some users from viewing sensitive data, according to configuration settings	Normal High None
6	**Select Date of Service** (today's date is the default)	You can type in a different date or use the calendar tool to change today's date if required	April, 2008 Date of Service: 2008-04-30
7	**Save Visit** **Hint:** in order to streamline the registration process you can leave additional data (forms / issues) to be entered while the client is in consultation or after the he/she has left the clinic /the visit cycle is closed)	**Note**: Before saving the visit, it is possible (but not mandatory) to add "Issues" (eg. allergies, problems, medication, surgery, etc.) or additional data "Forms" (GCAC, counselling, follow-up) to it. (See corresponding Process Guidelines)	**New Visit Form** Consultation Brief Description: Pap smear / Gyn consultation Visit Category: 2 Re-Visit Facility: St. Thomas Clinic Sensitivity: Normal Date of Service: 2009-08-20 [Save] [Add Issue]
8	If required, a person with appropriate security rights (Administrator) can Delete the Visit by selecting the (Delete) link.	Deleting a visit is a restricted function, depending on the user's security profile (if you do not see the Delete link, ask your system administrator if needed)	**This Visit** for Deborah Alleyne: (Delete) **Administrator** Patient Encounter
9	You can return to the Visit page, by selecting the Patient Encounter link, or		**This Visit** for Deborah Alleyne: **Administrator** Patient Encounter
10	You can view a List of existing visits for the active client, by selecting: Client > Visits > List **Hint**: there are 2 possible views of the visit list (Billing view and Clinical view)	**Past Visits and Documents** (To Billing View) Date / Issue / Reason/Form 2009-04-23 / / test 2009-02-26 / Y: penicillin / pap smear and consultation general 2009-02-25 / Y: penicillin / paid in advance for service TL 2009-02-25 / Y: penicillin / pap smear	Visits Calendar New Visit Current List
11	**Hint**: A visit cycle is closed when the Tally Sheet has been created and filled out to produce a Client Bill, and the Checkout process is completed. Do not open a new visit for a client if a previous visit is still open. Doing so can be very confusing.	**Hint**: An important Validation tools is the Appt-Visit Report that can be printed at the end of the day and reflects possible ERRORS such as visits **Not Checked Out,** which would mean the visit has not been closed properly.	**Appointments and Visits** Practitioner / Date/Appt / Client / Client ID / System ID / Visit / Charges / Copays / Billed / Error Unknown / 2009-08-20 / Montserrat Babel / MBA-20090127-002 / 91 / 506 / 50.00 / GCAC visit form is missing, Not checked out Totals for Unknown / 1 / 50.00 EN, Doctor / 2009-08-20 / Laura Aaron / 2009-04-10-01 / 104 / 505 / 30.00 / Not checked out Totals for EN, Doctor / 1 / 30.00 Grand Totals / 2 / 80.00
12	**Hint**: If you just created the visit but have not completed a Tally sheet, the above Appt-Visit report will not show the error. However you can use the Client> Visit > List option to verify the existence of visits without financial information	**Hint**: You can always verify (before creating a new visit) whether visits for this client are open in the Visit List, i.e. the Billing columns are empty	**Past Visits and Documents** (To Clinical View) Date / Billing Note / Code / Chg / Paid / Adj / Bal 2 visits open (no financial data)