PROCESS DESCRIPTION VERSION 4.0 (June 2010)

POSSIBLE ROLES: RECEPTIONIST/CASHIER/COUNSELLOR	PROCESS 1.2.1: Advanced search of an existing 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	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		**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		
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		Only fields having an 'N' in the Options column are shown in the search list
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		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		All clients whose first name is Donna are shown in the list. Note that there is 1 male
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		Only clients whose first name is Donna and sex is male are displayed
7	By entering both the first and last name, the exact client's name is displayed		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		Selecting client in search list will activate her/his existing record