

OpenEMR Users Guide

Based on Version 3.1.0

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Getting Started

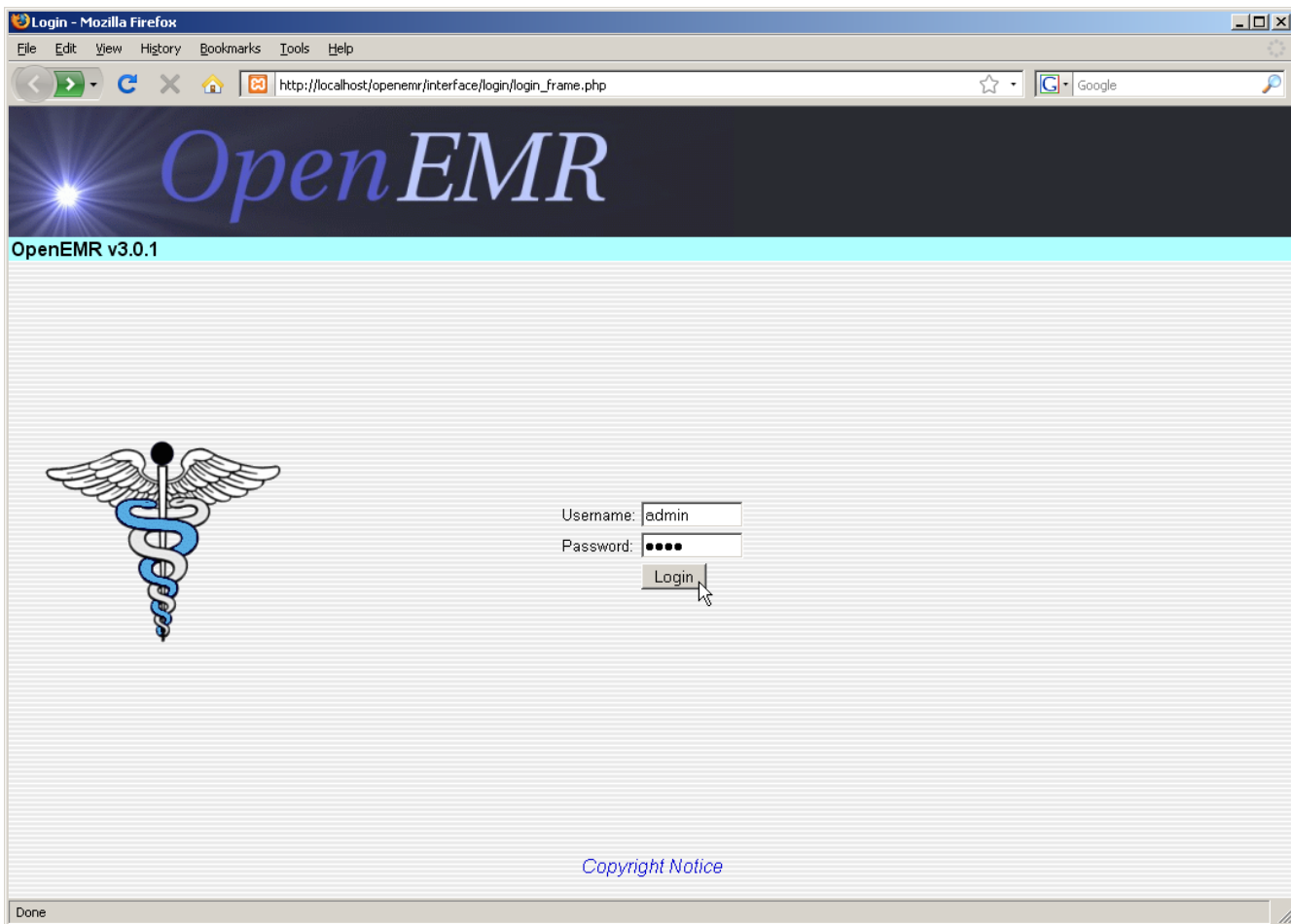
Getting to the Login Page

In your browser's address bar you will need to enter the location of your OpenEMR installation. For most users this address will consist of the name of your server followed by a forward leaning slash, "openemr" and another forward leaning slash. This should look like this:

`http://MyServerName/openemr/`

Be sure to check with your Administrator, as the location of your OpenEMR installation may be different. As an example the OpenEMR live demo is located at: <http://www.oemr.org/demo/openemr/>

Once you have entered the correct address, you should be presented with the login screen:

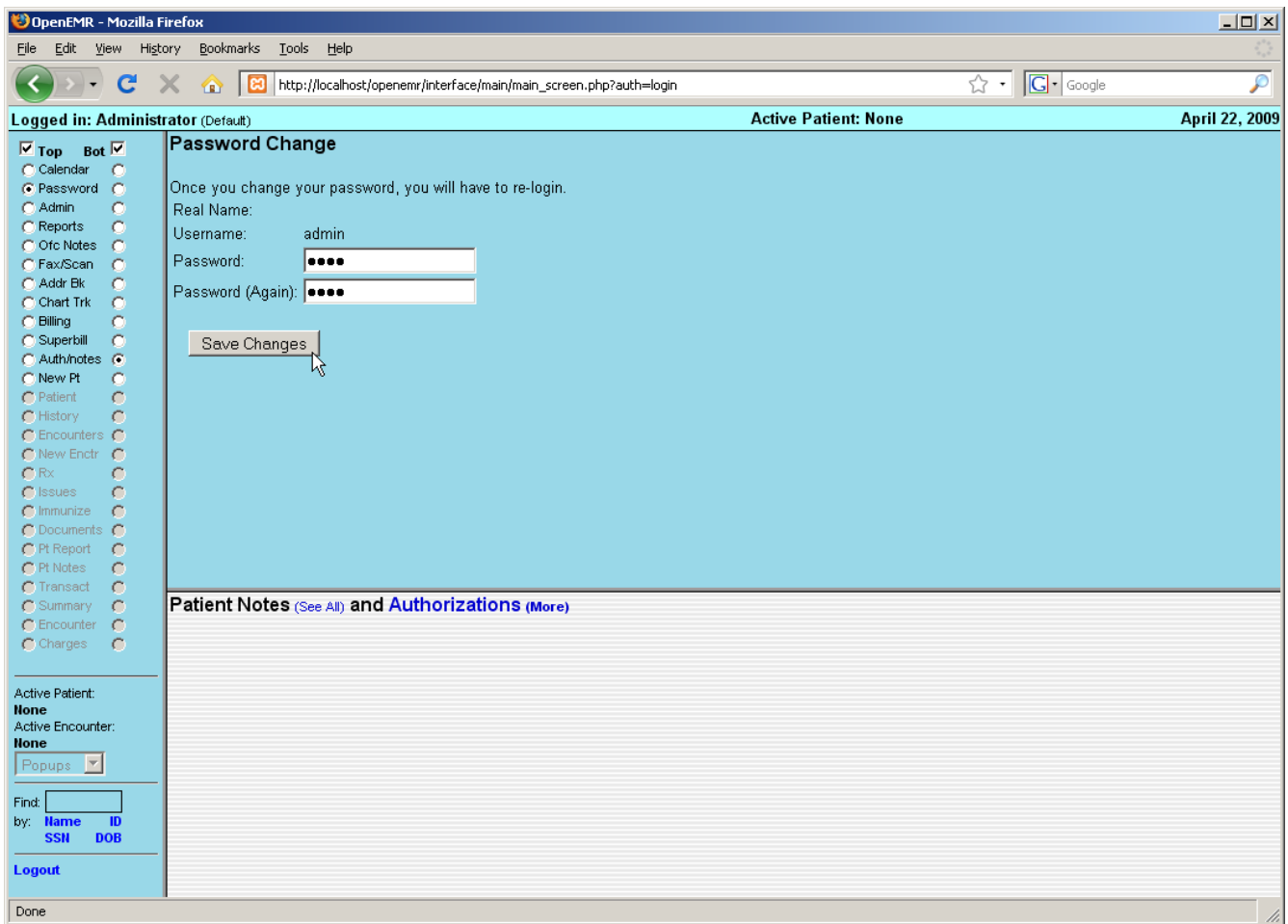


Logging In

The login screen contains two input boxes: Username and Password. The first time you log in to a fresh installation of OpenEMR you will need to log in as "admin" with a password of "pass". Your administrator may provide with a your own username and password. (Note that the OpenEMR login is case-sensitive.) Once you have entered the correct username and password, simply click the 'Login' button or press 'Enter'.

Changing Passwords

If this is your first time logging in to OpenEMR it is recommended that you change your password to something more secure. To do this select 'Password' from the navigation list on the left, found under 'Miscellaneous' in the Tree View navigation scheme.



This will bring up the “Password Change” screen. Enter your new password into the two input boxes, make sure you type the same thing into each box. And remember that OpenEMR's username and passwords are case sensitive!

Once you've done this, click the 'Save Changes' button. You will then be required to login again with your new password.

Main Screen & Navigation

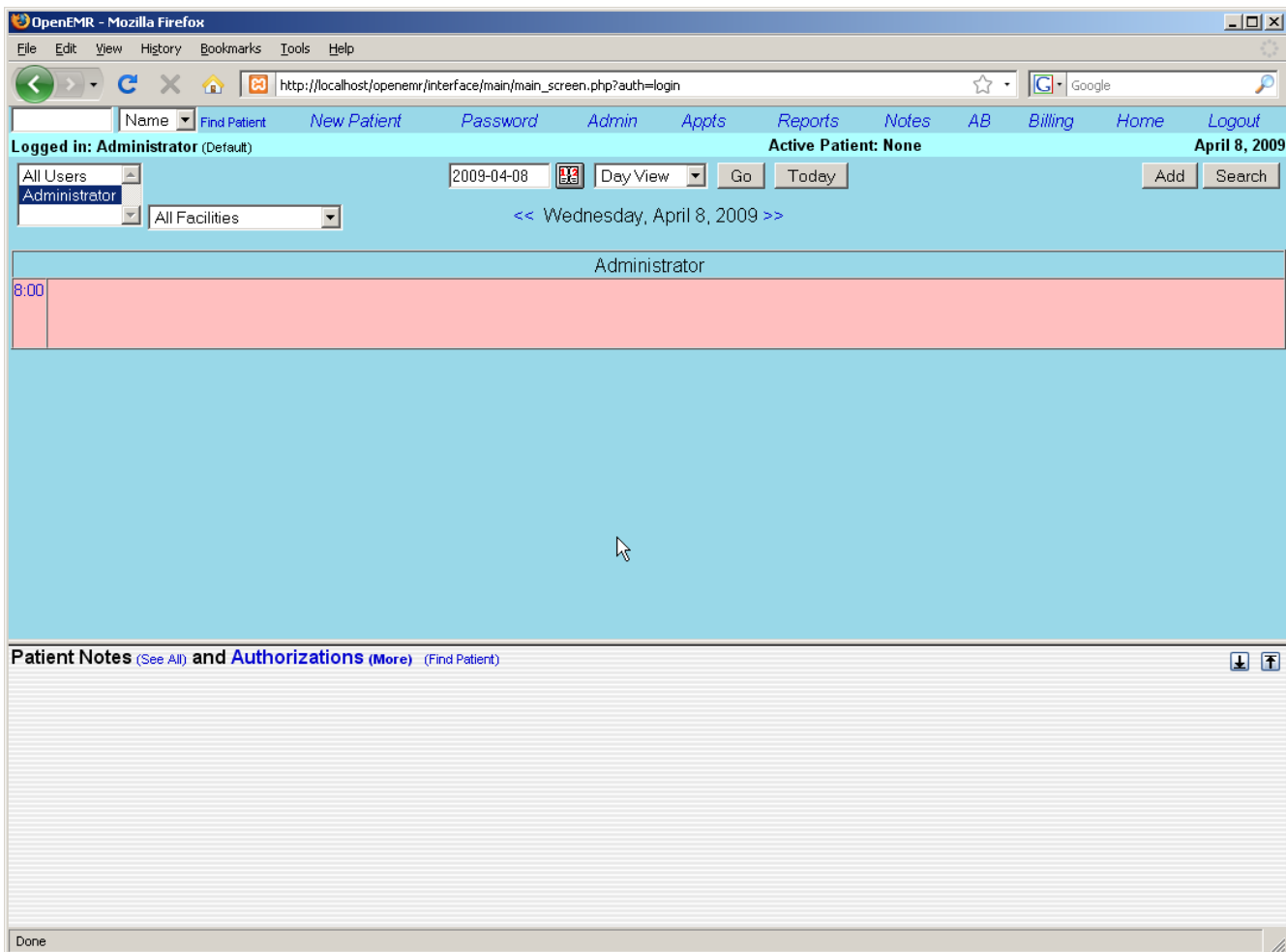
A successful login will bring you to the main screen of OpenEMR. The user is presented with two windows, the Calendar, and below that, the Patient Notes & Authorizations page.

Navigation

OpenEMR can be configured with your choice of three navigation schemes. Traditional, Tree View, or Radio Buttons. You can specify which scheme you would like to use by editing the file `openemr/interface/globals.php` (Detailed instructions can be found [here](#).)

Traditional

The Traditional navigation scheme uses context-sensitive menus located at the top of the screen, which change depending on what page is being viewed. The patient search function is also located at the top left corner of the screen.

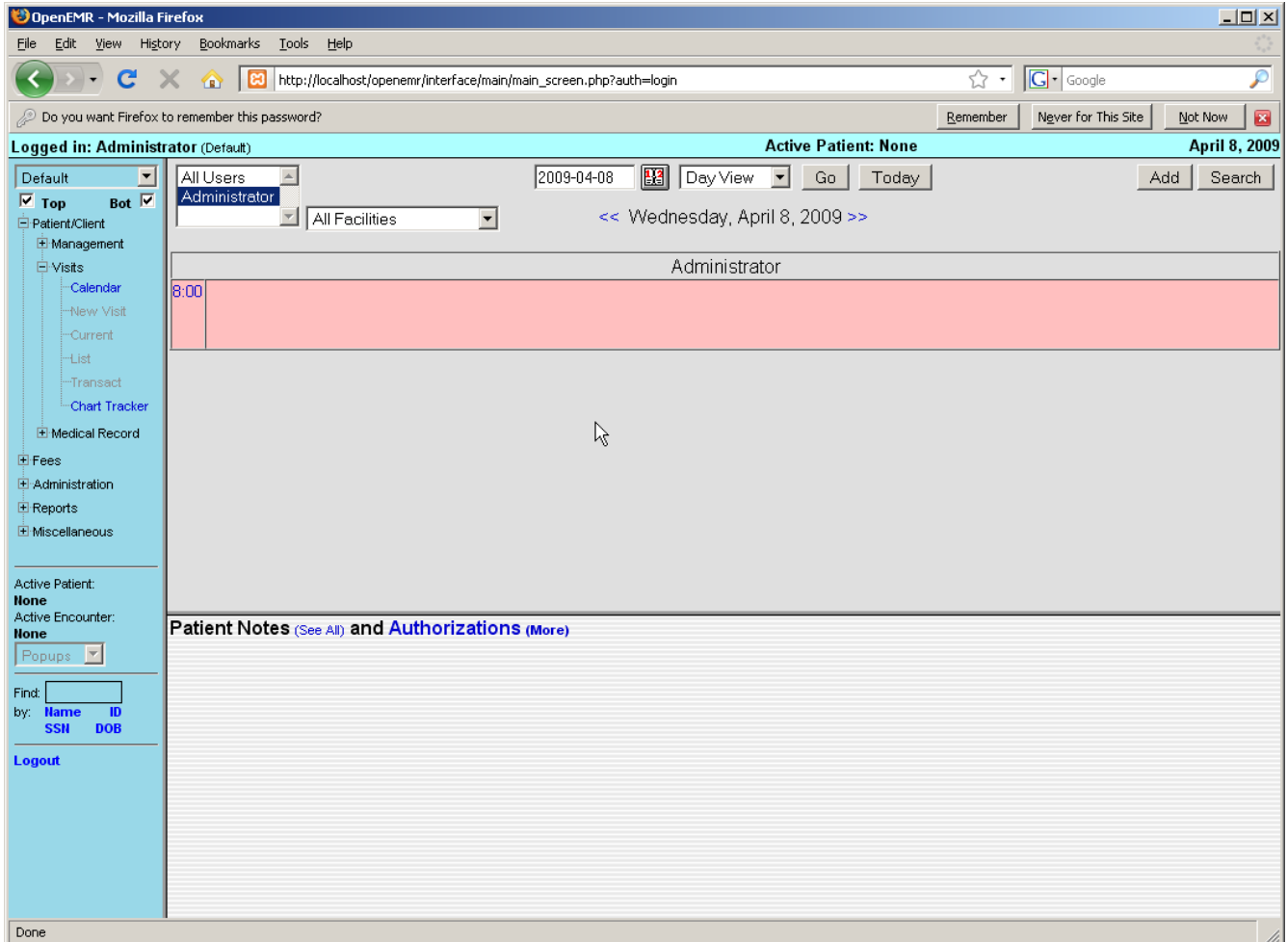


In the Traditional navigation scheme related pages are linked. Pages load simultaneously to facilitate the data entry process.

Tree View

The Tree View is the default navigation scheme for OpenEMR 3.1. This navigation scheme presents a hierarchical list of page links on the left side of the screen which can be directed to load in either the top or bottom window of the main screen.

The patient search function is located below the navigation list on the left hand side of the screen.



Radio Buttons

The Radio Button navigation scheme functions similar to the Tree View except that the links are presented as an unordered list, with a series of radio button to the right and left of each item.

Selecting the left radio button will load the desired page in the top window, while selecting the right hand button will load the page in the bottom window. You can also disable the top or bottom window by clicking on the appropriate checkbox at the top of the navigation menu.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 8, 2009

Top Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- PT Report
- PT Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: [Name](#) [ID](#)
[SSN](#) [DOB](#)

[Logout](#)

All Users
Administrator

2009-04-08 Day View Go Today Add Search

All Facilities

<< Wednesday, April 8, 2009 >>

| | |
|------|---------------|
| 8:00 | Administrator |
|------|---------------|

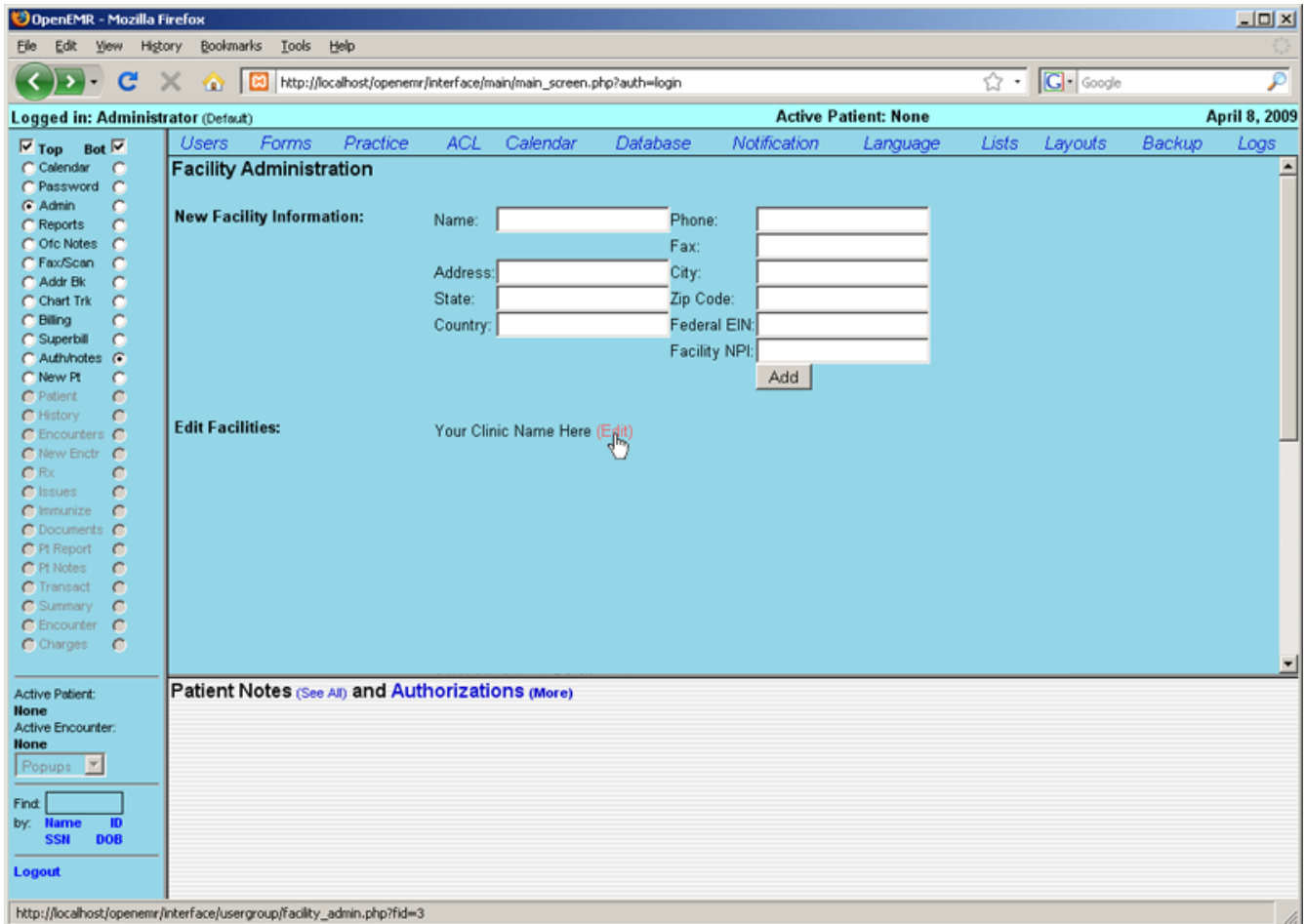
Patient Notes [\(See All\)](#) and Authorizations [\(More\)](#)

Done

Setting Up Your Clinic

To begin using OpenEMR, navigate to your server's installation directory and log in using your assigned username and password.

A successful login brings you to the appointment calendar. Before you begin scheduling appointments you'll want to configure some basic information for your users. To start setting up your clinic, select 'Admin' from the navigation list on the left of the screen. If you're using the Tree View navigation scheme, this will bring up a list of available administration pages. Click 'Facilities' to bring up the Facility Administration page.

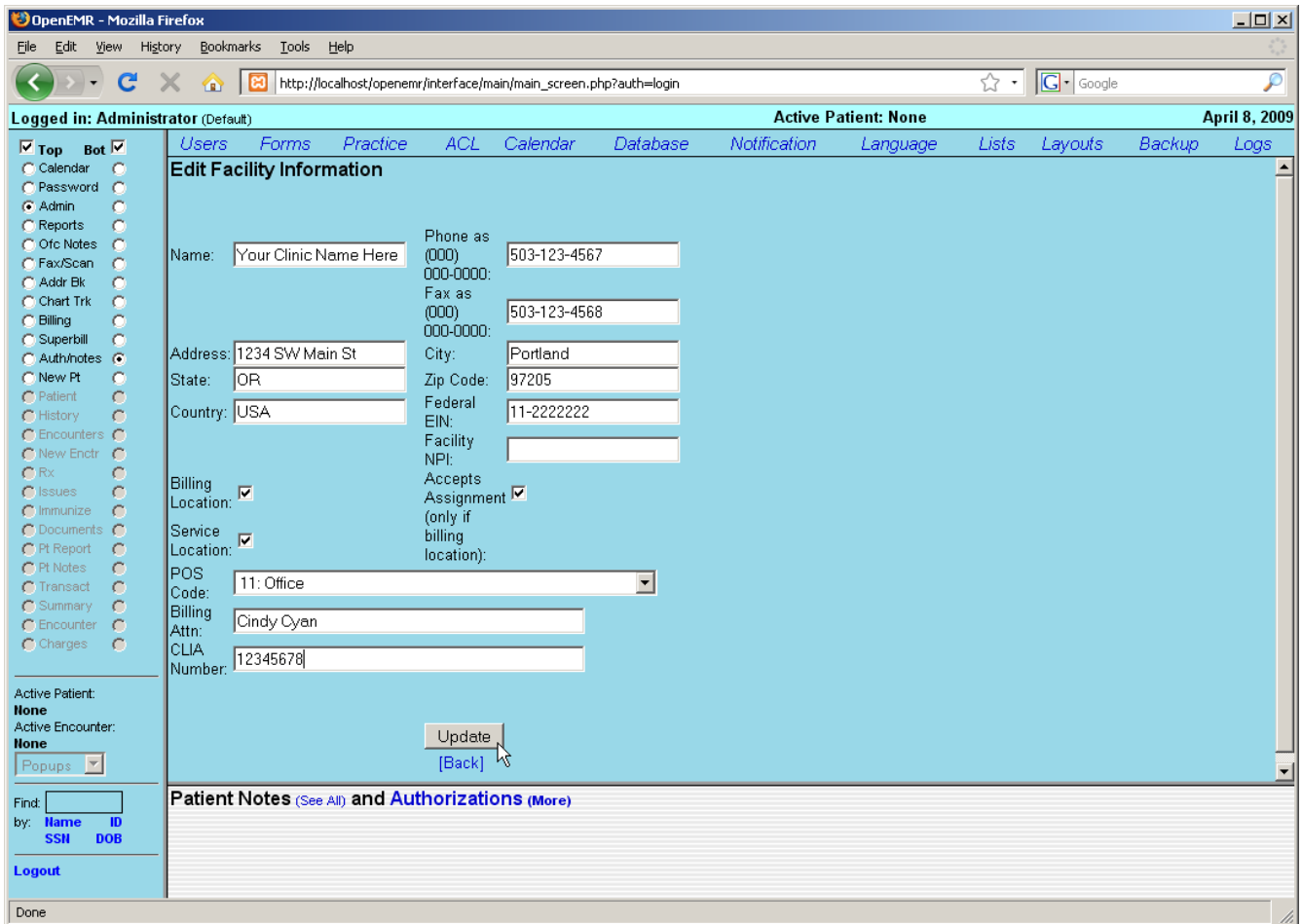


This is one of several pages within the Administration section of OpenEMR. Administration also includes sections for managing your facility's Forms, Practice information, Calendar categories, Lists, Database administration, and more. Links to these sections can be found at the top of the Administration window, or in the left hand navigation list under 'Administration' if you are using the tree view.

Facility Administration

We'll start by setting up your facility for your users. There is a default clinic already built in. It will need to be updated with the correct information for your clinic. To do this, click 'edit' next to the line labeled "Your Clinic Name Here"

This takes you to the Edit Facility page.



Enter the correct name, address & contact information for your clinic. This information will be used for billing, so make sure to include who to direct billing information to, and enter your facility's NPI and CLIA number. Indicate whether your facility is a billing and/or service location by clicking the checkbox next to the appropriate option. If your clinic is a billing location, you may also want to check the "Accepts Assignment" box.

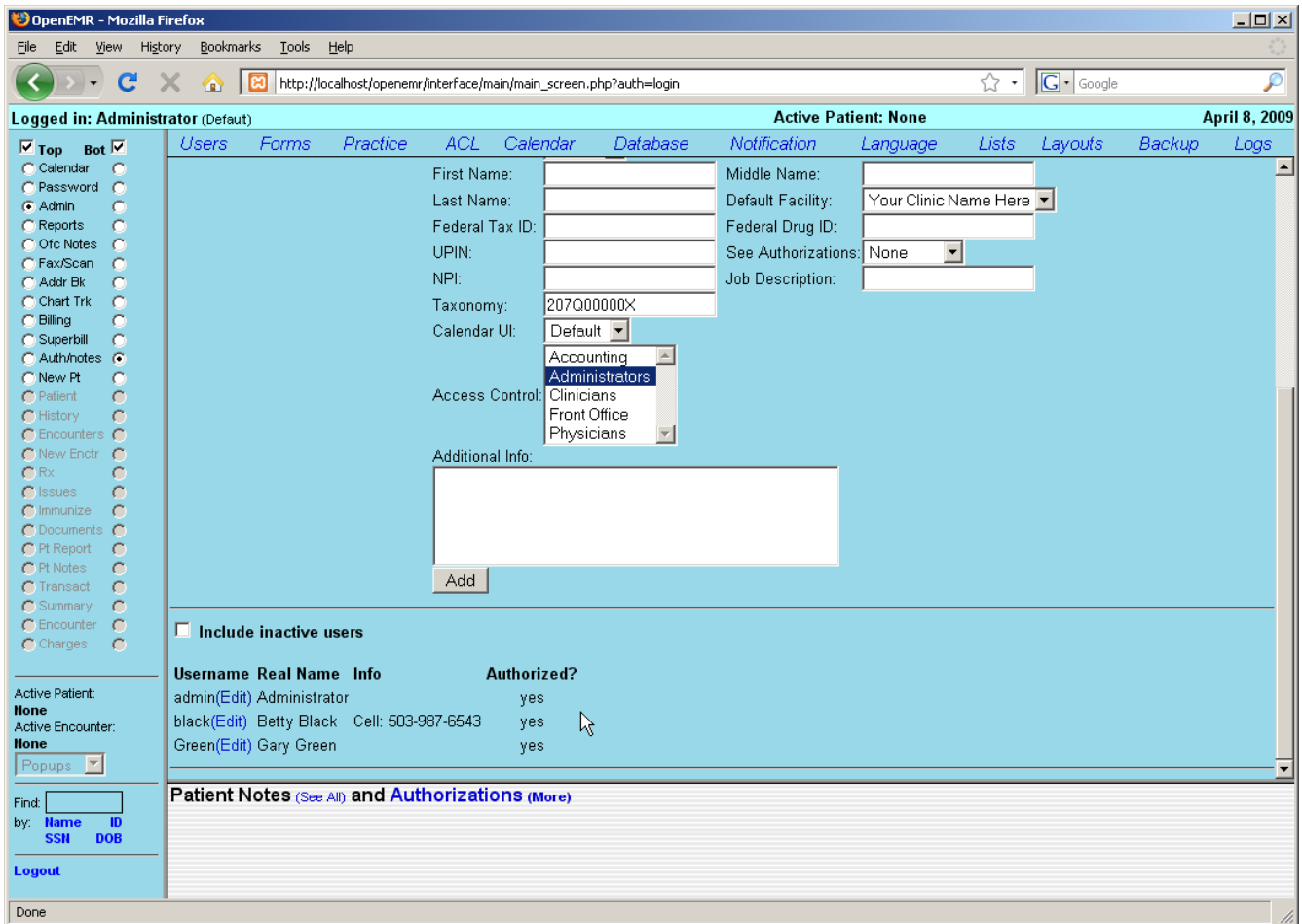
When you are finished entering your clinic's information click the 'Update' button, then click 'Back' to return to the Facility Administration page.

Your clinic may have additional facilities in which care is given, such as a hospital. To add these, enter them into the "New Facility Information" section and click the 'Add' button.

User Administration

Clicking 'Users' at the top of the screen (or on the left side in tree view) will bring you to the User & Group Administration page. The bottom of this page contains a list of your clinic's users. If you have not yet added any users, then only "admin" will be shown.

You can add a new user by filling in the form to the right of the "New User" heading and then clicking 'Add.' Or you can modify an existing user by clicking the 'Edit' link next to that user's name.



Clicking 'Edit' will bring up the User Administration page. Here you can edit a user's password, facility information and access controls, as well as their authorization status. Authorized users are practitioners, and will appear in the appointment calendar. They can also be associated with encounters for billing purposes, and are able to authorize encounter information entered by non-authorized users so that the encounter will be billable.

Make sure that your practitioners are 'Authorized' by clicking the check box in the User Administration page. Other facility staff do not need to be authorized. Practitioners will also need their UPIN and Federal Tax ID entered for correct billing, as well as their Federal Drug ID for prescription writing.

Once your users' information has been updated successfully click 'Save' and then 'Back' to return to the User & Group Administration page.

- Top Bot
- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- PT Report
- PT Notes
- Transact
- Summary
- Encounter
- Charges

User Administration

Username: Password: * Leave blank to keep password unchanged.
 Authorized: Active:
 First Name: Middle Name:
 Last Name: Default Facility:
 Federal Tax ID: Federal Drug ID:
 UPIN: See Authorizations:
 NPI: Job Description:
 Taxonomy: Calendar UI:

Access Control:

Additional Info:

[\[Back\]](#)

Active Patient: None
 Active Encounter: None

Find:
 by: Name ID
 SSN DOB

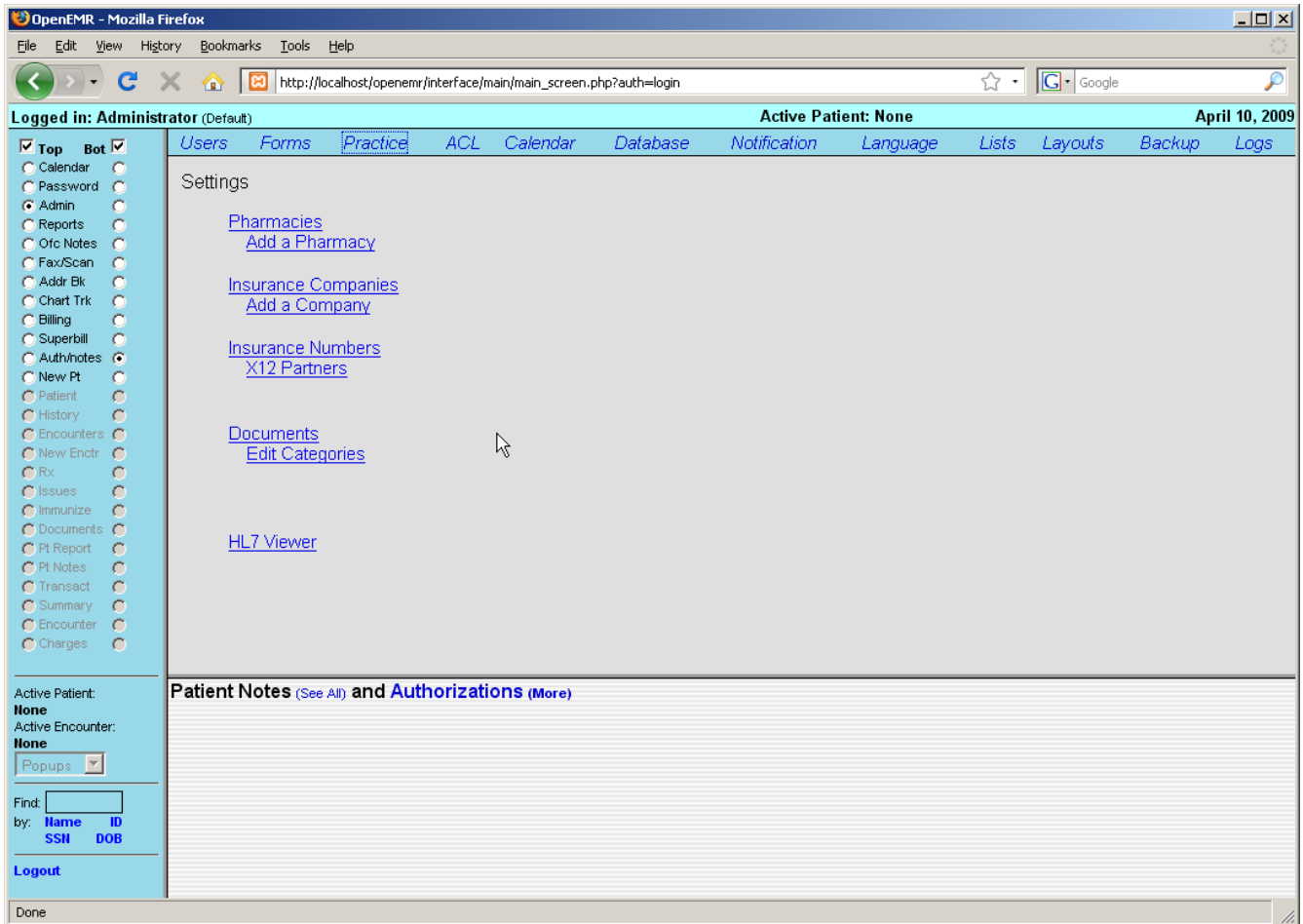
[Logout](#)

Patient Notes [\(See All\)](#) and Authorizations [\(More\)](#)

Practice Administration

Next you'll need to enter the relevant practice information for your clinic. This includes pharmacy and insurance company information, as well as the types of documents your clinic accepts.

Clicking the 'Practice' link at the top of the screen will bring you to the Practice Administration page.



The screenshot shows the OpenEMR interface in Mozilla Firefox. The browser title is "OpenEMR - Mozilla Firefox" and the address bar shows "http://localhost/openemr/interface/main/main_screen.php?auth=login". The page is logged in as "Administrator (Default)" and the active patient is "None". The date is "April 10, 2009".

The main navigation menu includes: Users, Forms, Practice, ACL, Calendar, Database, Notification, Language, Lists, Layouts, Backup, and Logs. The "Practice" link is highlighted.

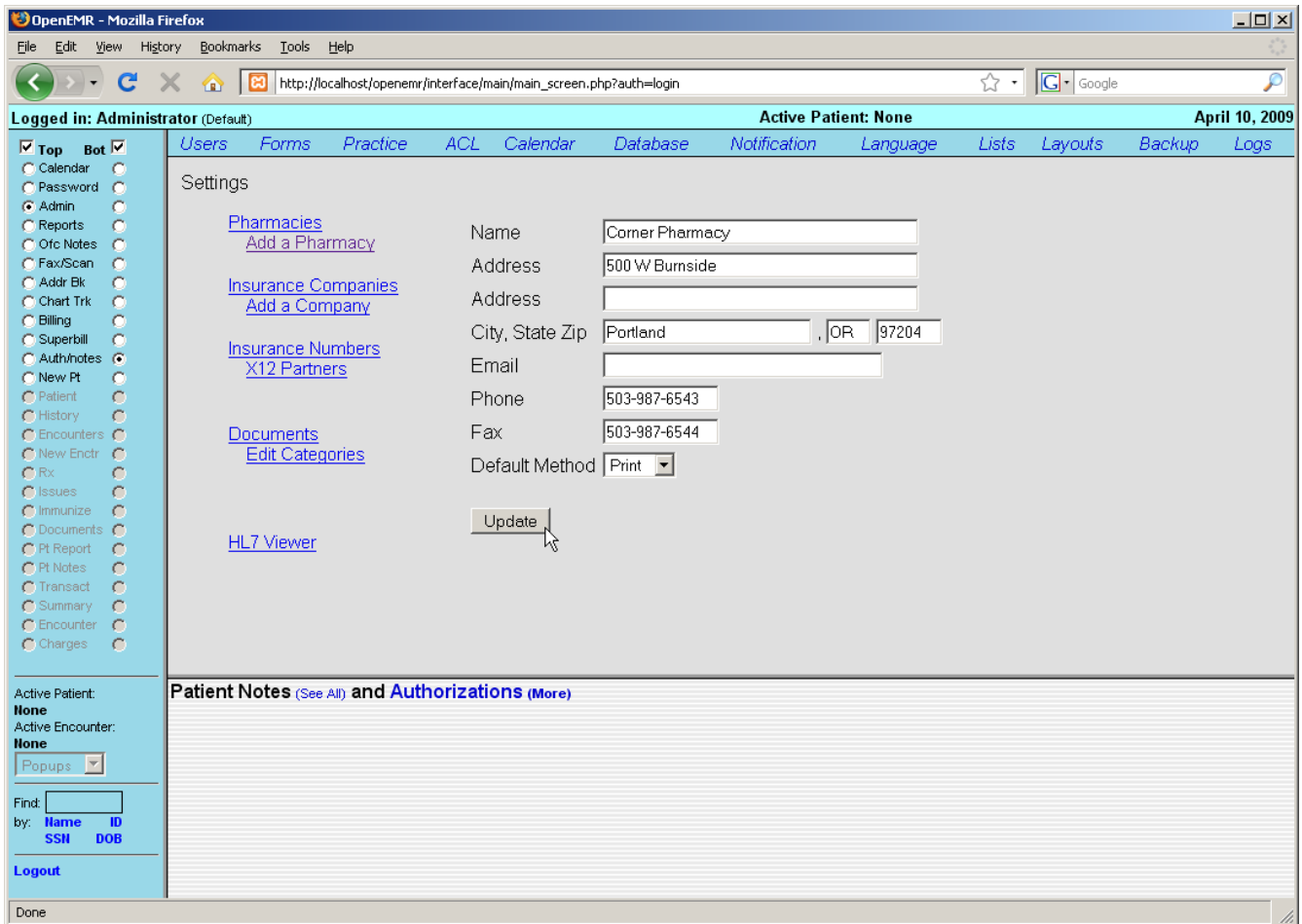
The "Settings" section contains the following links:

- Pharmacies
 - Add a Pharmacy
- Insurance Companies
 - Add a Company
- Insurance Numbers
 - X12 Partners
- Documents
 - Edit Categories
- HL7 Viewer

The left sidebar contains a list of menu items with checkboxes for "Top" and "Bot". The "Authnotes" item is selected. Other items include Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Bk, Chart Trk, Billing, Superbill, Patient, History, Encounters, New Enctr, Rx, Issues, Immunize, Documents, Pt Report, Pt Notes, Transact, Summary, Encounter, and Charges.

At the bottom left, there are fields for "Active Patient: None", "Active Encounter: None", a "Popups" dropdown menu, and a "Find:" search box with options for "Name ID" and "SSN DOB". A "Logout" button is also present.

Click 'Add a Pharmacy' to enter the contact information for your clinic's pharmacy. A drop down menu lets you select the preferred method for transferring prescription information. Once you've entered the correct information, click 'Update' to save your new pharmacy.



Before setting up any insurance companies, you'll want to enter your X12 Partner information. These are the clearinghouses or large payers to whom you will send electronic billing. Most practices will probably just use a single clearinghouse.

To add one of these clearinghouses, click on 'X12 Partners' and then click 'Add New Partner'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

[Pharmacies](#)
[Add a Pharmacy](#)

[Insurance Companies](#)
[Add a Company](#)

[Insurance Numbers](#)
[X12 Partners](#)

[Documents](#)
[Edit Categories](#)

[HL7 Viewer](#)

X12 Partner

Partner Name

ID Number (ETIN)

Receiver ID

Sender ID

Version

Processing Format

Active Patient: None

Active Encounter: None

Popups

Find:

by: [Name](#) [ID](#)
[SSN](#) [DOB](#)

[Logout](#)

Patient Notes (See All) and Authorizations (More)

Done

The ID numbers that you enter here will need to be provided to you by the clearinghouse/partner. The Version number refers to the version of the X12 837p protocol specification used and should probably not be changed. Click 'Add' to save the information you've entered.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies
[Add a Pharmacy](#)

| Name | City, State | Default X12 Partner |
|--------------------------------|------------------------|---------------------|
| MedOne | South San Francisco CA | Zirmed |
| Pacific Health | Pasadena CA | Zirmed |

Insurance Companies
[Add a Company](#)

Insurance Numbers
[X12 Partners](#)

Documents
[Edit Categories](#)

[HL7 Viewer](#)

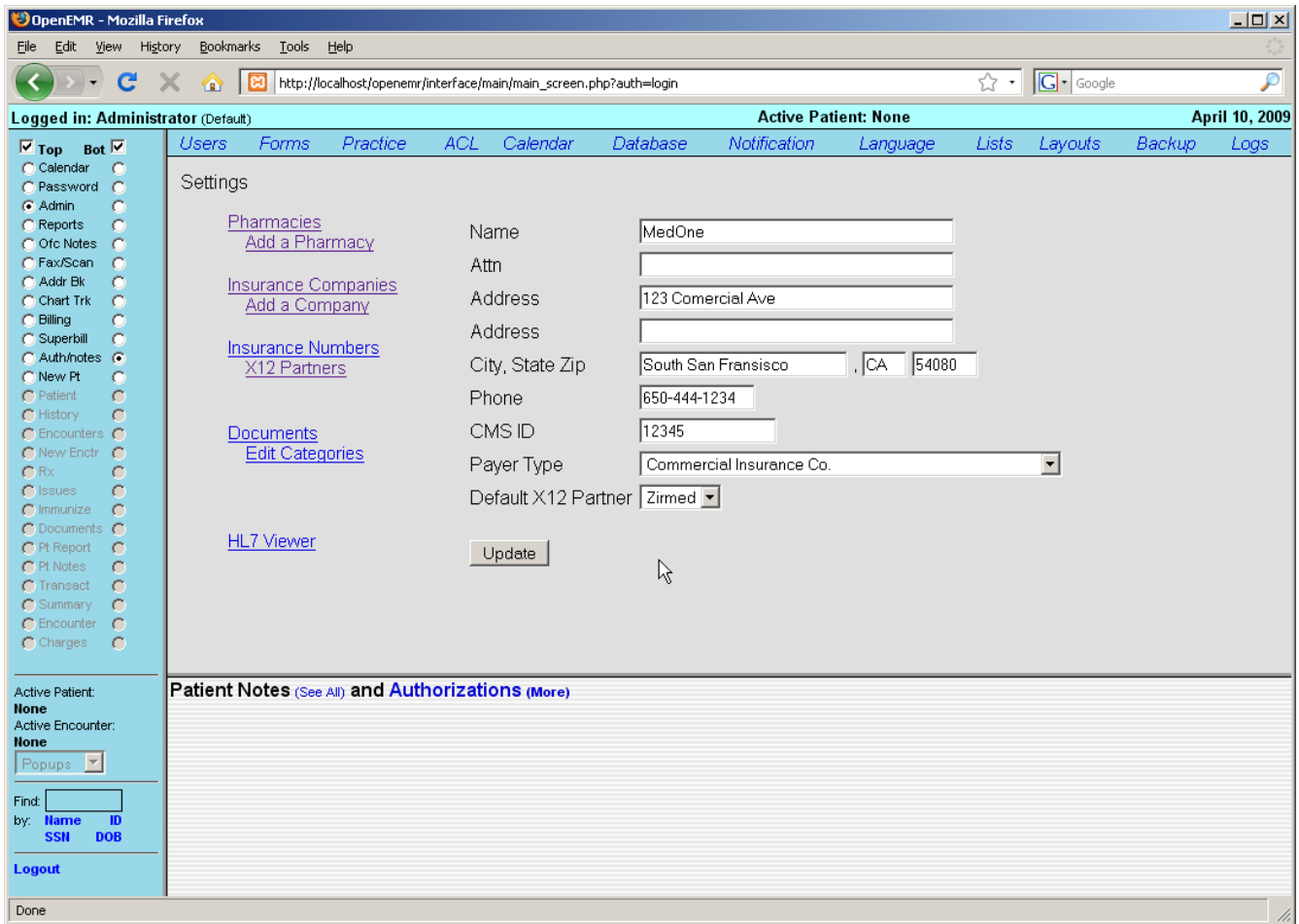
Active Patient: None
Active Encounter: None
Popups
Find:
by: [Name](#) [ID](#)
[SSN](#) [DOB](#)

Logout

Patient Notes [\(See All\)](#) and [Authorizations \(More\)](#)

Done

Selecting 'Insurance Companies' from the links to the left of the page brings up a list of Companies that have been added to your clinic. If this is a new installation of OpenEMR, this list will be empty. You can add a new insurance company by clicking 'Add a Company'. Or, you can edit an existing company by clicking on it's name in the list.



Once you have entered the correct information, click 'Update' to save any changes, or add the new company to the list.

In practice, many insurance companies have multiple insurance plans with a separate billing address for each plan. At this time, you will need to add each plan as a separate insurance company.

Many insurance companies also assign their own doctor-specific ID numbers, and these numbers must appear in your claims. Click on 'Insurance Numbers' to see a list of your clinic's providers and their default ID numbers.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies
[Add a Pharmacy](#)

| Name | Provider # | Rendering # | Group # |
|-------------------------------|------------|-------------|---------|
| Administrator | Default | 22334 | 01234 |
| Betty Black | Default | | |
| Gary Green | Default | | |

Insurance Companies
[Add a Company](#)

Insurance Numbers
[X12 Partners](#)

Documents
[Edit Categories](#)

[HL7 Viewer](#)

Active Patient: None
Active Encounter: None
Popups
Find:
by: Name ID SSN DOB
Logout

Patient Notes (See All) and Authorizations (More)

Done

Click on a provider's name to bring up a list of insurance companies and the corresponding ID numbers that have been entered for that provider.

Selecting 'Add New...' presents a form for adding this provider's numbers for another insurance company. Fill in this information and click the 'Add' button to save. You can also edit an existing set of numbers by clicking on the company name in the list.

Note that one of the selections in the drop down list of insurance companies is "Default"; you can use this to fill in default numbers for insurance companies not otherwise entered.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None April 10, 2009

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Settings

Pharmacies
[Add a Pharmacy](#) Provider Administrator
 MedOne Provider # 22334
 Rendering Provider #
 Group # 01234

Insurance
[Companies](#)
[Add a Company](#) Add New...

Insurance
[Numbers](#)
[X12 Partners](#)

Documents
[Edit Categories](#)

HL7 Viewer

Insurance Company Default Type:
 Provider Number Unspecified Type:
 Rendering Provider Number Unspecified Type:
 Group Number

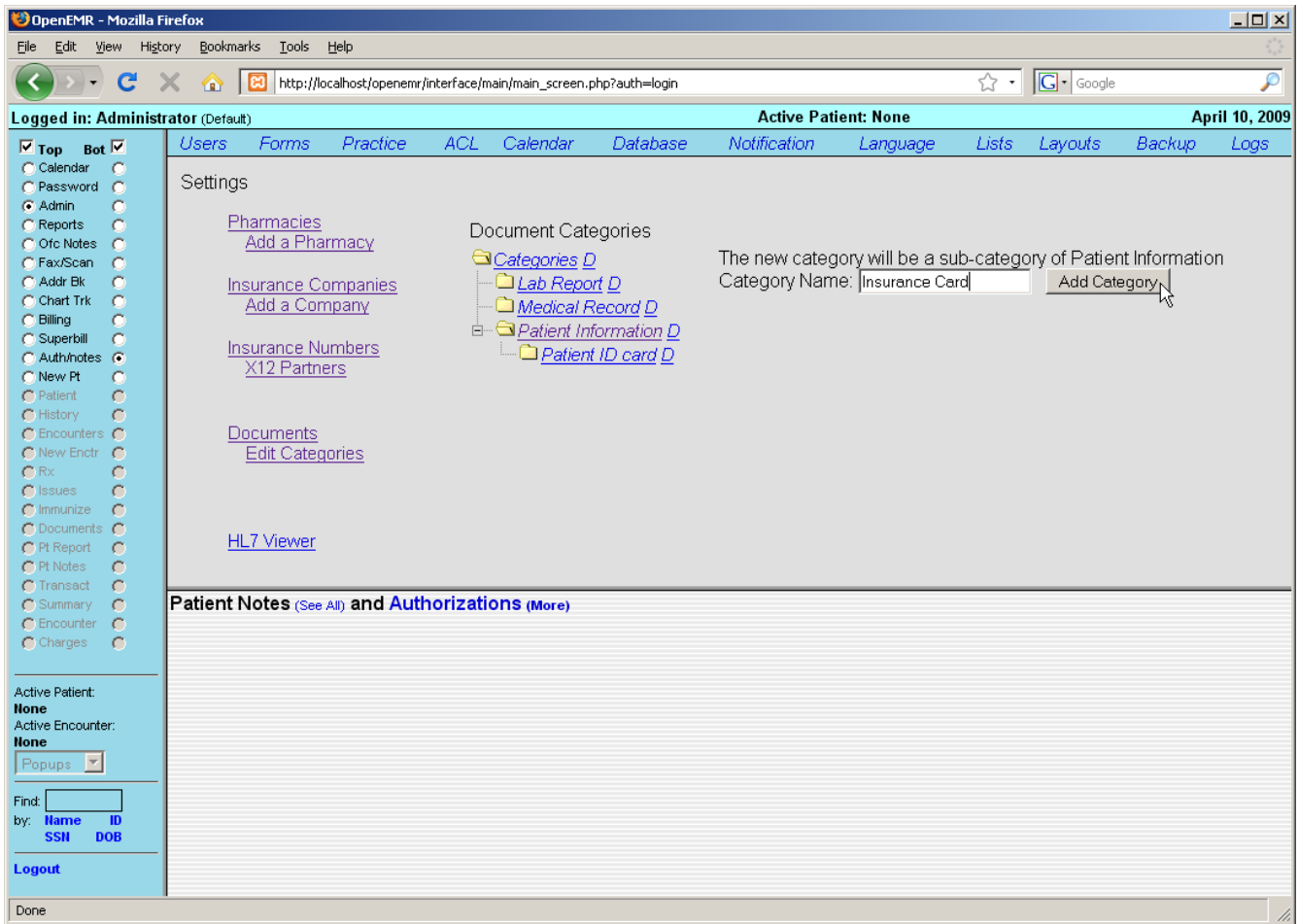
Update

Active Patient: None
 Active Encounter: None
 Popups
 Find:
 by: Name ID
 SSN DOB
 Logout

Patient Notes (See All) and Authorizations (More)

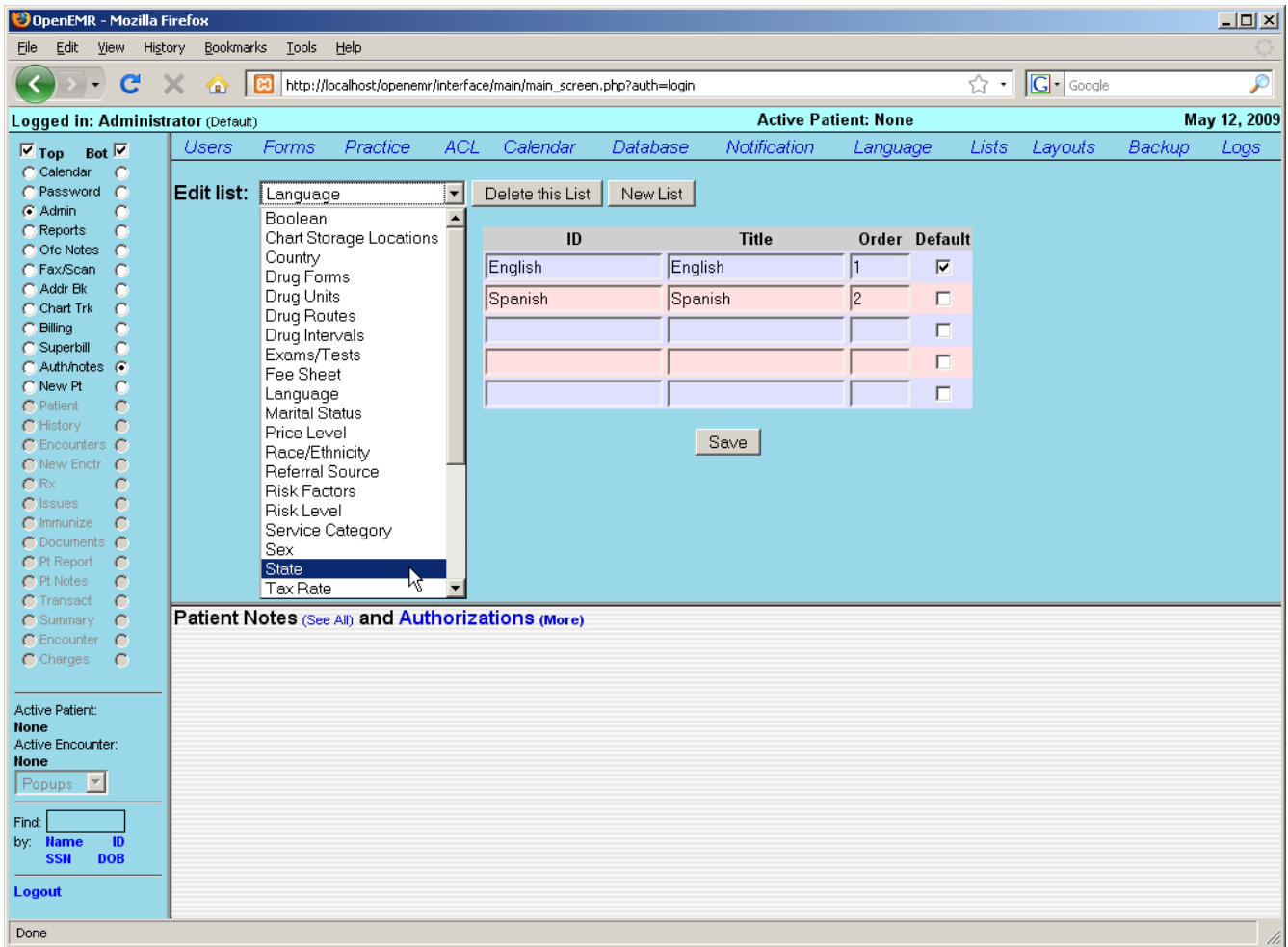
Done

Next click on 'Edit Categories'. This displays a hierarchy of the different types of documents that you can attach to a patient. The default set is shown. To add more categories click on the desired parent name, fill in the name of the new document type, and click 'Add Category'



Lists

Select 'Lists' from the menu at the top of the Admin page. This brings you to OpenEMR's List Management system. This is where many of the selection lists within OpenEMR are stored and edited. Before you begin using OpenEMR you will need to populate these lists with data appropriate to your clinic.



Select 'State' from the drop-down list. OpenEMR comes configured with only one state by default. If your clinic sees patients from only one state you can simply replace the default state by clicking in the 'ID' and 'Title' fields and replacing them with the appropriate information.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Top Bot

Calendar Password Admin Reports Ofc Notes Fax/Scan Addr Bk Chart Trk Billing Superbill Auth/notes New Pt Patient History Encounters New Enctr Rx Issues Immunize Documents Pt Report Pt Notes Transact Summary Encounter Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: Name ID
SSN DOB

Logout

Done

Edit list: State Delete this List New List

| ID | Title | Order | Default |
|----|------------|-------|--------------------------|
| CA | California | 1 | <input type="checkbox"/> |
| | | | <input type="checkbox"/> |
| | | | <input type="checkbox"/> |
| | | | <input type="checkbox"/> |

Save

Patient Notes (See All) and Authorizations (More)

Alternatively, you can add multiple states by filling in the empty fields that are provided for you. You can also specify which state you would like to use as the default by selecting the checkbox next to that state.

When you are finished modifying the list, click 'Save'. This will update the list and generates a new set of empty fields should you need to add additional states to the list.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Users Forms Practice ACL Calendar Database Notification Language Lists Layouts Backup Logs

Top Bot
 Calendar
 Password
 Admin
 Reports
 Ofc Notes
 Fax/Scan
 Addr Bk
 Chart Trk
 Billing
 Superbill
 Auth/notes
 New Pt
 Patient
 History
 Encounters
 New Enctr
 Rx
 Issues
 Immunize
 Documents
 Pt Report
 Pt Notes
 Transact
 Summary
 Encounter
 Charges

Active Patient: None
 Active Encounter: None
 Popups

Find:
 by: Name ID
 SSN DOB

Logout

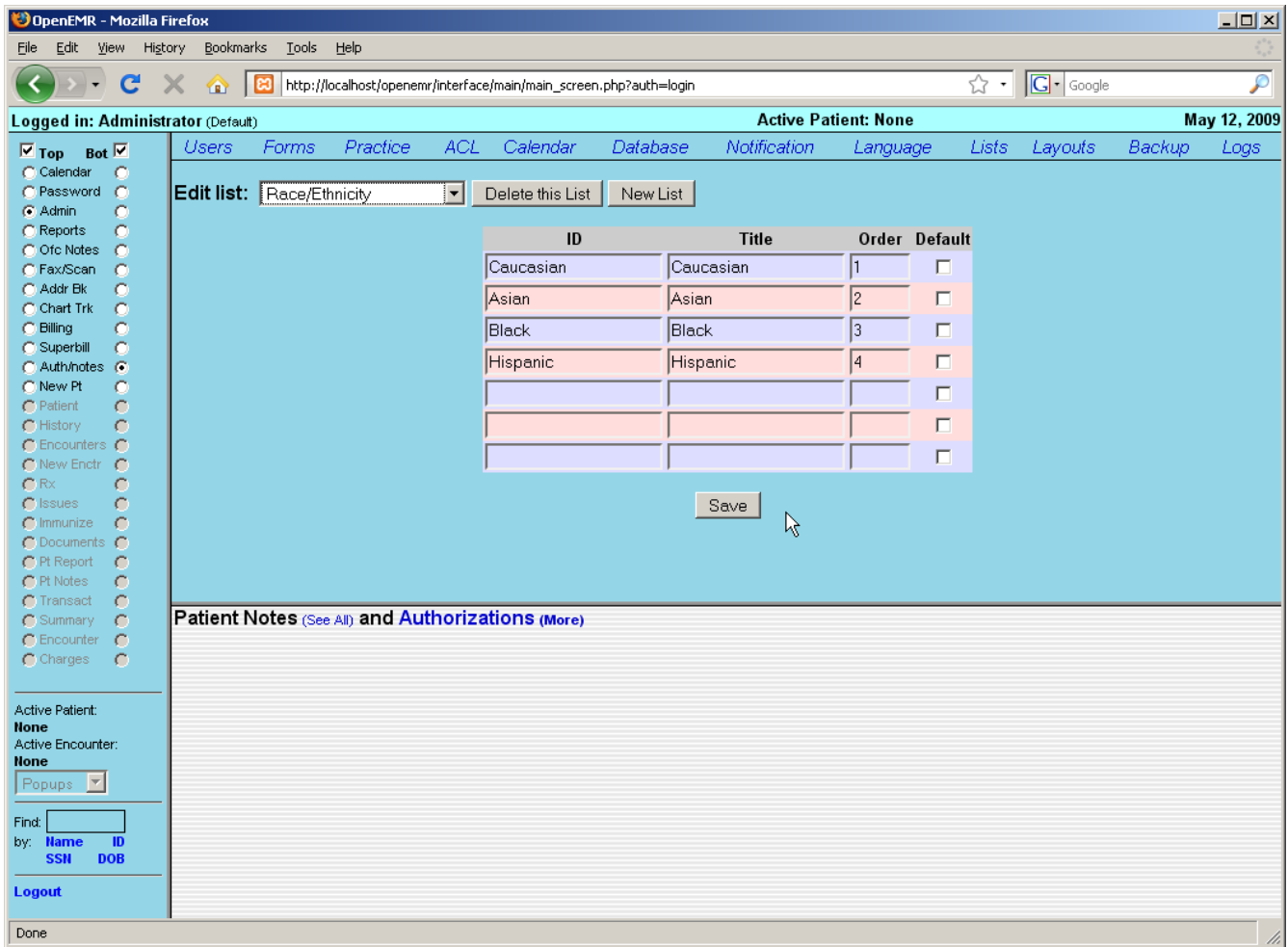
Done

Edit list: State

| ID | Title | Order | Default |
|----|------------|-------|-------------------------------------|
| CA | California | 1 | <input type="checkbox"/> |
| OR | Oregon | 2 | <input checked="" type="checkbox"/> |
| | | | <input type="checkbox"/> |
| | | | <input type="checkbox"/> |

Patient Notes [\(See All\)](#) and Authorizations [\(More\)](#)

The drop-down contains lists for Race/Ethnicity, common billing codes that appear in the Fee Sheet, Price Levels, common Exams/Tests, etc. All of these lists may be modified in this same manner.



Address Book

OpenEMR also contains a built-in address book for storing useful contact information for your staff as well as other doctors, clinics, etc. that your office may contact on a regular basis.

Select 'Addr Bk' (under 'Miscellaneous') from the navigation menu to bring up your clinic's Address Book.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot
 Calendar
 Password
 Admin
 Reports
 Ofc Notes
 Fax/Scan
 Addr Bk
 Chart Trk
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 Superbill
 Auth/notes
 New Pt
 Patient
 History
 Encounters
 New Enctr
 Rx
 Issues
 Immunize
 Documents
 Pt Report
 Pt Notes
 Transact
 Summary
 Encounter
 Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: [Name](#) [ID](#)
[SSN](#) [DOB](#)

[Logout](#)

First Name: Last Name: Specialty: Search [Add New](#)

| Name | Local | Specialty | Phone | Mobile | Fax | Email | Street | City | State | Postal |
|----------------|-------|-----------|-------|--------|-----|-------|--------|------|-------|--------|
| Administrator, | * | | | | | | | | | |
| Black, Betty | * | | | | | | | | | |

[Patient Notes \(See All\)](#) and [Authorizations \(More\)](#)

Done

This will present you with a list of all of the contacts currently contained in your Address Book. Click on a person's name to edit their contact information, or click 'Add New' to enter a new contact into your address book.

Name: Dr. Last: Orange First: Ophelia Middle:

Specialty: Dermatology

Organization: Universal Health Center

Valedictory:

Home Phone: **Mobile:**

Work Phone: 503-222-3344 **2nd:** **Fax:** 503-222-3345

Assistant:

Email:

Website:

Main Address: 4456 SE Washington St.

City: Portland **State/county:** OR **Postal code:** 97215

Alt Address:

City: **State/county:** **Postal code:**

UPIN: U78901 **NPI:** **TIN:** **Taxonomy:** 207Q00000X

Notes:

Done

In the 'Add New Person' dialog box, select a title, and enter their name and address. If you are adding a physician to your address book, be sure to include their UPIN and other ID numbers for billing and referrals. Entering a 'Specialty' will allow you to narrow your search parameters when writing letters to a particular physician, etc.

When you are finished entering the new contact information, click 'Save'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot
 Calendar Password
 Admin Reports
 Otc Notes Fax/Scan
 Addr Bk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Rx Issues
 Immunize Documents
 Pt Report Pt Notes
 Transact Summary
 Encounter Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: Name ID
 SSN DOB

Logout

Done

First Name: Last Name: Specialty: Search

| Name | Local | Specialty | Phone | Mobile | Fax | Email | Street | City | State | Postal |
|-----------------|-------|-------------|--------------|--------|--------------|-------|------------------------|----------|-------|--------|
| Administrator, | * | | | | | | | | | |
| Black, Betty | * | | | | | | | | | |
| Orange, Ophelia | | Dermatology | 503-222-3344 | | 503-222-3345 | | 4456 SE Washington St. | Portland | OR | 97215 |

Patient Notes [\(See All\)](#) and Authorizations [\(More\)](#)

Note that the new contact has been added to the list.

You can search for a particular contact in the address book by enter their name and/or specialty at the top of the page and clicking 'Search'. This brings up a list of any contacts matching your search parameters.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: None May 12, 2009

Top Bot
 Calendar
 Password
 Admin
 Reports
 Ofc Notes
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 Addr Bk
 Chart Trk
 Billing
 Superbill
 Auth/notes
 New Pt
 Patient
 History
 Encounters
 New Enctr
 Rx
 Issues
 Immunize
 Documents
 Pt Report
 Pt Notes
 Transact
 Summary
 Encounter
 Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: [Name](#) [ID](#)
[SSN](#) [DOB](#)

[Logout](#)

Done

First Name: Last Name: Specialty: Search

| Name | Local | Specialty | Phone | Mobile | Fax | Email | Street | City | State | Postal |
|-----------------|-------|-------------|--------------|--------|--------------|-------|------------------------|----------|-------|--------|
| Orange, Ophelia | | Dermatology | 503-222-3344 | | 503-222-3345 | | 4456 SE Washington St. | Portland | OR | 97215 |

Patient Notes [\(See All\)](#) and Authorizations [\(More\)](#)

Adding A New Patient

Once you have entered all the necessary clinic information you can begin entering patient data.

Click 'New Pt.' in the navigation menu on the left of the screen to begin entering a new patient into the system. In the Tree View scheme the Search or Add Patient page can be found under 'Patient/Client – Management – New/Search'.

Patient Demographics

In the Search or Add Patient page enter the patient's name & birth date. If you have an existing chart for this patient, you may enter the chart number under 'External ID'. If you do not enter a number the system will automatically assign one that is equal to its internal patient ID. When you are finished click 'Save Patient Demographics'.

Note: Clicking the calendar button next to the “DOB” field will pop up an easy to use date selection tool found throughout the OpenEMR program. Simply click the arrows to the right or left of “Today” to advance the date forward or back a single month or year, or hold an arrow down to select the month or year manually. Selecting the day of the month will then fill the selected date into it's respective field in the proper format (YYYY-MM-DD)

The screenshot shows the OpenEMR interface in Mozilla Firefox. The browser address bar shows the URL: `http://localhost/openemr/interface/main/main_screen.php?auth=login`. The page header indicates the user is logged in as Administrator (Default) and the active patient is Rod Roark (1) with a DOB of 2009-04-14 and age of 4 months. The date is April 10, 2009.

The main content area is titled "Demographics (Back)" and includes a "Who" section with the following fields:

- Name: Mr. Rod Roark
- External ID: 1
- DOB: 1985-08-06 (with a calendar icon)
- Sex: Male
- S.S.: 111-22-3333
- License/ID: 1234567
- Marital Status: Married
- User Defined: [Empty field]

A calendar is open for August 1985, showing the date 6th selected. The calendar has a header for "August, 1985" and "Today". The days of the week are labeled: wk, Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates are: 30, 31, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31. The date 6th is highlighted in blue. Below the calendar is the text "Tue, Aug 6".

Below the "Who" section are several checkboxes for additional information:

- Contact
- Choices
- Employer
- Stats
- Insurance

At the bottom of the "Who" section is a button labeled "[Save Patient Demographics]".

The left sidebar contains a navigation menu with the following items:

- Top Bot
- Calendar
- Password
- Admin
- Reports
- Otc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Authnotes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

At the bottom of the sidebar, there is a section for "Active Patient: Rod Roark (1)" and "Active Encounter: None". There is also a "Find:" field and a "Logout" button.

You should now be presented with the patient Demographics page, which contains a summary of the patient's identifying information, including employment, insurance and provider information.

Notice that all of the patient related pages are now accessible via the navigation menu to the left.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find:
by: Name ID
SSN DOB

Logout

Done

Demographics [\(More\)](#) [\(Delete\)](#)

Who Name: Mr. Rod Roark External ID: 1 **Balance Due: \$0.00**
 DOB: 1985-08-06 Sex: Male
 S.S.: License/ID: [Upcoming Appointments](#)
[New Appointment](#)

Contact Marital Status: User Defined: City:
 Address: Postal Code:
 State: Emergency Contact:
 Country: Emergency Phone: Home Phone:
 Work Phone: Mobile Phone:

Choices Contact Email: Provider: Allow Voice Message:
 Pharmacy: Allow Mail Message: Allow SMS: NO
 HIPAA Notice Received: Leave Message With:
 Allow Email: NO Employer Name:

Employer Occupation: City:
 Employer Address: Postal Code:
 State: Country: Race/Ethnicity:
 Language: Family Size:
 Financial Review Date: 0000-00-00 00:00:00 Homeless, etc.:
 Monthly Income: Interpreter: Migrant/Seasonal:

Patient Notes [\(See All\)](#) and **Authorizations** [\(More\)](#)

To continue entering patient information click 'Demographics (more)' at the top of the page.

This will bring up a series of expandable sections containing inputs for the various types of patient data. Click the checkbox next to the section or sections you would like to work with. Fill in the desired fields. Note that fields labeled in red are required in order for billing to work properly.

Continue entering data as necessary.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find:
by: Name ID SSN DOB

Logout

Done

Demographics (Back)

Who
 Contact

Address: 321 SW Capitol Hwy City: Portland
State: Unassigned Postal Code: 97219
Country: USA Emergency Contact: Wife
Emergency Phone: 971-222-3333 Home Phone: 503.456-7890
Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
Contact Email: mr.rod@gmail.com

Choices

Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
HIPAA Notice Received: YES Allow Voice Message: YES
Allow Mail Message: NO Allow SMS: NO
Allow Email: YES Leave Message With: wife

Employer
 Stats
 Insurance

[Save Patient Demographics]

Patient Notes (See All) and Authorizations (More)

The last section in the Demographics area is the Insurance section.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Top Bot
 Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Bk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Rx Issues
 Immunize Documents
 PT Report PT Notes
 Transact Summary
 Encounter Charges

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

Find:
by: Name ID SSN DOB

Logout

Done

Demographics (Back)

Who
 Contact
 Choices
 Employer
 Stats
 Insurance

Primary Insurance Provider: Pacific Health

Plan Name: PH 7.0
Effective Date: 0000-00-00
Policy Number: 1122334
Group Number: 1234
Subscriber Employer (SE)
 (if unemployed enter Student, PT Student, or leave blank): NW Company
SE Address: 44566 Industry Way
SE City: Portland **SE State:** OR
SE Zip Code: 97002 **SE Country:** USA

Subscriber: Rod Roark
Relationship: Self (Browse)
D.O.B.: 2009-04-14 **S.S.:** 111-22-3333 **Sex:** Male
Subscriber Address: 321 SW Capitol Hwy
City: Portland **State:** OR
Zip Code: 97219 **Country:** USA
Subscriber Phone: 503.456-7890
CoPay:
Accept Assignment: YES

Secondary Insurance Provider: Unassigned

Plan Name:
Effective Date: 0000-00-00
Policy Number:

Subscriber:
Relationship: (Browse)
D.O.B.: 0000-00-00 **S.S.:** **Sex:**

Patient Notes (See All) and Authorizations (More)

Select the patient's insurance company from the drop-down list, or you can search for it by clicking 'Search/Add Insurer'. Doing so brings up a dialog box containing several fields which are searchable (labeled in green). Entering a partial value into one or more fields and clicking the 'Search' button pops up a second dialog containing a list of all insurance companies matching those parameters.

Selecting the desired name from the list will automatically make it the selection for that patient.

Insurance Company Search/Add - Mozilla Firefox

http://localhost/openemr/interface/practice/ins_search.php

Name: Pacific

Attention:

Address1:

Address2:

City/State: Pasadena CA

Zip/Country: USA

Phone:

CMS ID:

Payer Type: Commercial Insurance Co.

X12 Partner: Zirmed

Search Save as New Cancel

Done

List Insurance Companies - Mozilla Firefox

http://localhost/openemr/interface/practice/ins_list.php?form_name=Pacific&form_attn=&form_addr1=&form_addr2=&form_city=Pasadena&form_

| Name | Attn | Address | City | State | Zip | Phone |
|----------------|------|-----------------|----------|-------|-------|--------------|
| Pacific Health | | 2001 E 123rd St | Pasadena | CA | 90059 | 310-654-3210 |

Done

If the desired insurance company is not yet entered, you can also add it here by completing all the fields and clicking 'Save as New'. This also selects the newly added insurance company for this patient.

If the patient is the also the insured party, then selecting “self” from the drop-down list will automatically populate the “subscriber” section with the relevant data for you.

When you are finished, click 'Save Patient Demographics' at the bottom of the page to save and return to the Demographics summary. You can see that all of the new patient data is now visible on the summary page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Demographics (More) (Delete)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$0.00
 DOB: 1985-08-06 Sex: Male Upcoming Appointments
 S.S.: 111-22-3333 License/ID: 1234567 [New Appointment](#)

Contact
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Provider: Betty Black

Choices
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife
 Occupation: Engineer Employer Name: NW Company

Employer
 Employer Address: 44566 Industry Way City: Portland
 State: OR Postal Code: 97002
 Country: USA

Stats
 Language: English Race/Ethnicity: Caucasian
 Financial Review Date: 0000-00-00 00:00:00 Family Size:
 Monthly Income: Homeless, etc.:
 Interpreter: Migrant/Seasonal:

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find:
 by: Name ID
 SSN DOB

Logout

Done

Patient Notes (See All) and Authorizations (More)

Patient History

Next select 'History' from the navigation menu on the left side of the screen. (under 'Patient/Client – Medical Record') This brings up a summary page containing information about the patient's medical history.

Clicking on 'Patient History / Lifestyle (more)' will bring up a data entry page with expanding sections, similar to that of the Demographics page.

OpenEMR - Mozilla Firefox
 File Edit View History Bookmarks Tools Help
 http://localhost/openemr/interface/main/main_screen.php?auth=login
 Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Patient History / Lifestyle (Back)

General

Risk Factors:

- Varicose Veins
- Hypertension
- Diabetes
- Sickle Cell
- Fibroids
- PID (Pelvic Inflammatory Disease)
- Severe Migraine
- Heart Disease
- Thrombosis/Stroke
- Hepatitis
- Gall Bladder Condition
- Breast Disease
- Depression
- Allergies
- Infertility
- Asthma
- Epilepsy
- Contact Lenses
- Contraceptive Complication (specify)
- Other (specify)

Exams/Tests:

| | N/A | Nor | Abn | Date/Notes |
|-----------------------|-----------------------|----------------------------------|----------------------------------|------------|
| Breast Exam | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Cardiac Echo | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| ECG | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | 2/3/2004 |
| Gynecological Exam | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Mammogram | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Physical Exam | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Prostate Exam | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | 3/4/2005 |
| Rectal Exam | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Sigmoid/Colonoscopy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Retinal Exam | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Flu Vaccination | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Pneumonia Vaccination | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| LDL | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Hemoglobin | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| PSA | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

Family History
 Relatives
 Lifestyle

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find:
 by: Name ID
 SSH DOB

Logout

OpenEMR - Mozilla Firefox
 File Edit View History Bookmarks Tools Help
 http://localhost/openemr/interface/main/main_screen.php?auth=login
 Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 2009-04-14 Age: 4 month April 10, 2009

Patient History / Lifestyle (Back)

General
 Family History

Father: Mother:
 Siblings: Spouse:
 Offspring:

Relatives

Cancer: Tuberculosis:
 Diabetes: High Blood Pressure:
 Heart Problems: Stroke:
 Epilepsy: Mental Illness:
 Suicide:

Lifestyle
 Other

Save To Issues Back

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

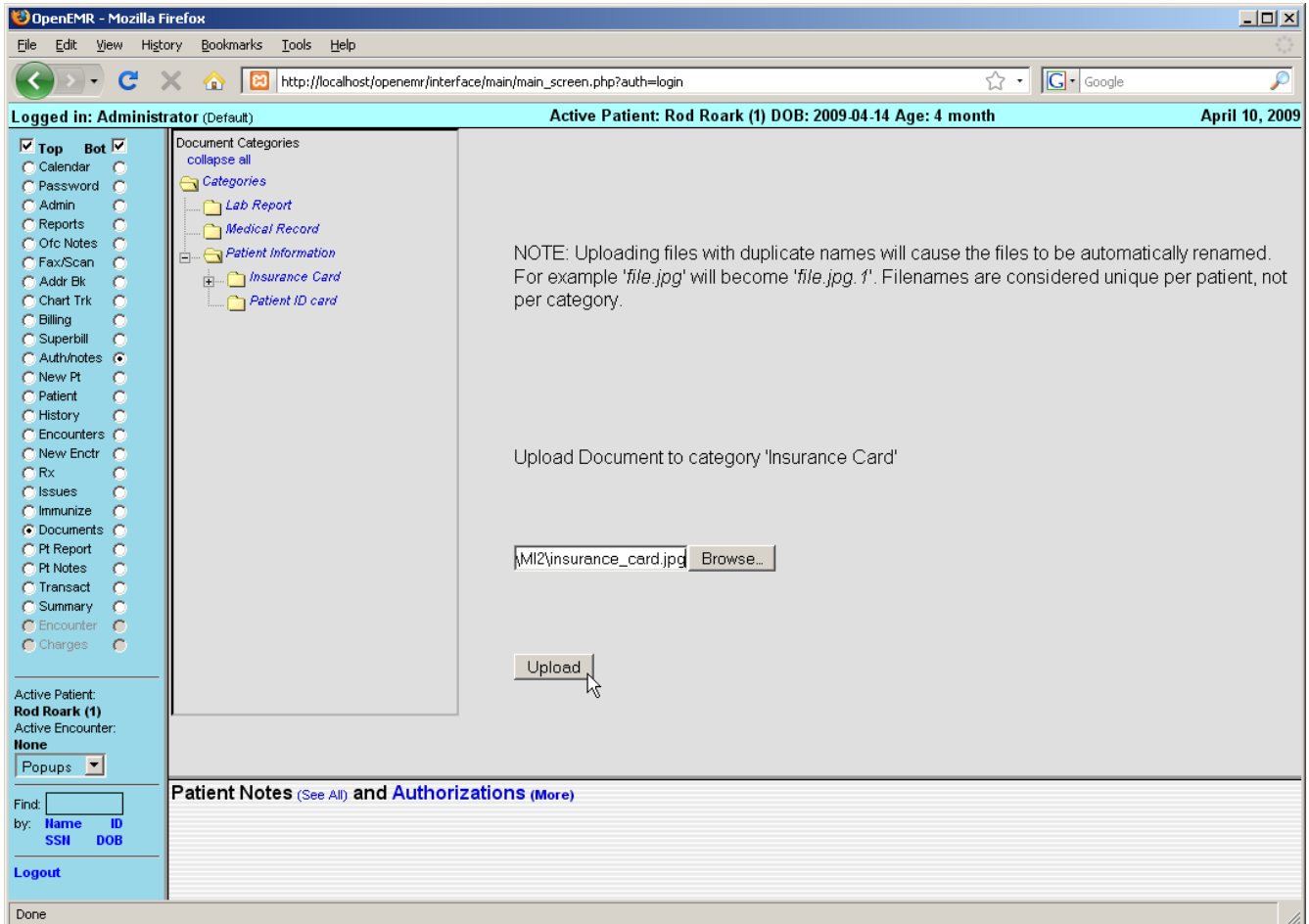
Find:
 by: Name ID
 SSH DOB

Logout

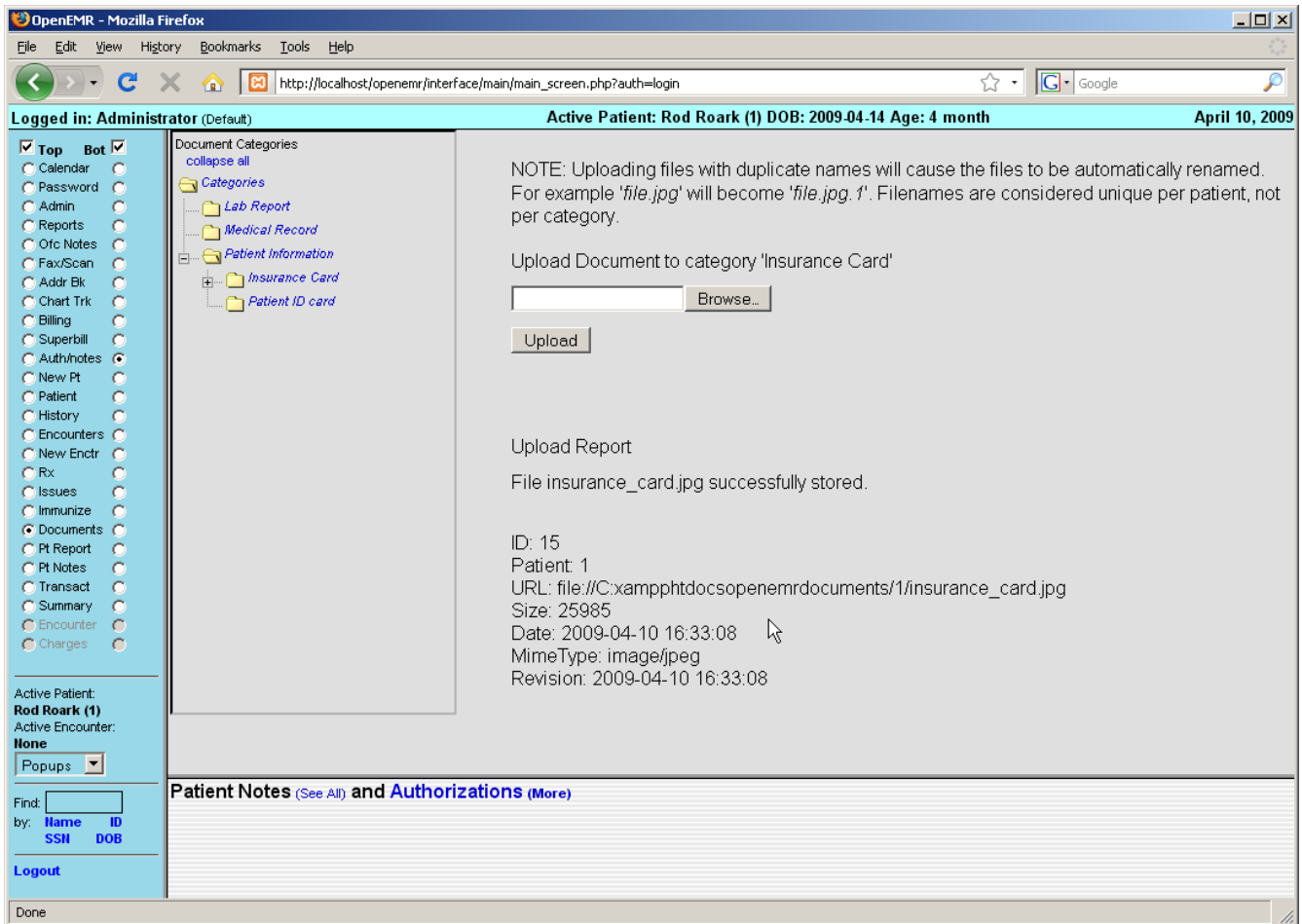
Access the desired sections by clicking on the appropriate check box, and enter in the patient's data as necessary, then click 'Save'.

Uploading Documents

Select 'Documents' from the navigation menu on the left. Here you may upload files that you have scanned and/or saved, such as a patient's ID or insurance card.



First, click the appropriate Document Category for the file you wish to upload, then click 'Browse'. This will present you with the standard dialog for locating the file on your computer. Once the desired file has been selected, click 'Upload' to save the file in OpenEMR.



Once the file is uploaded, you will be presented with a report, confirming the file has been uploaded successfully. To see the new file, click on the arrow next to the appropriate document category which displays a list of all the files in that category. Click on the name of the new file to view it.

- Top Bot
- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Document Categories

collapse all

- Categories
 - Lab Report
 - Medical Record
 - Patient Information
 - Insurance Card
 - 2009-04-10 insurance_card.jpg
 - Patient ID card

INSURANCE COMPANY NAME **COVERAGE TYPE**

MEMBER NAME: JOHN DOE EFFECTIVE DATE: XX-XX-XXXX
 MEMBER NUMBER: XXX-XX-XXXX

GROUP #: XXXXXX-XXX-XXX PRESCRIPTION GROUP #: XXXXX

PCP CO-PAY: \$15.00 PRESCRIPTION CO-PAY: \$15 GENERIC
 SPECIALIST CO-PAY: \$25.00 EMER. ROOM CO-PAY: \$75.00 \$20 NAME BRAND

MEMBER SERVICES: 1-800-XXX-XXXX
 CLAIMS/INQUIRIES: 1-800-XXX-XXXX

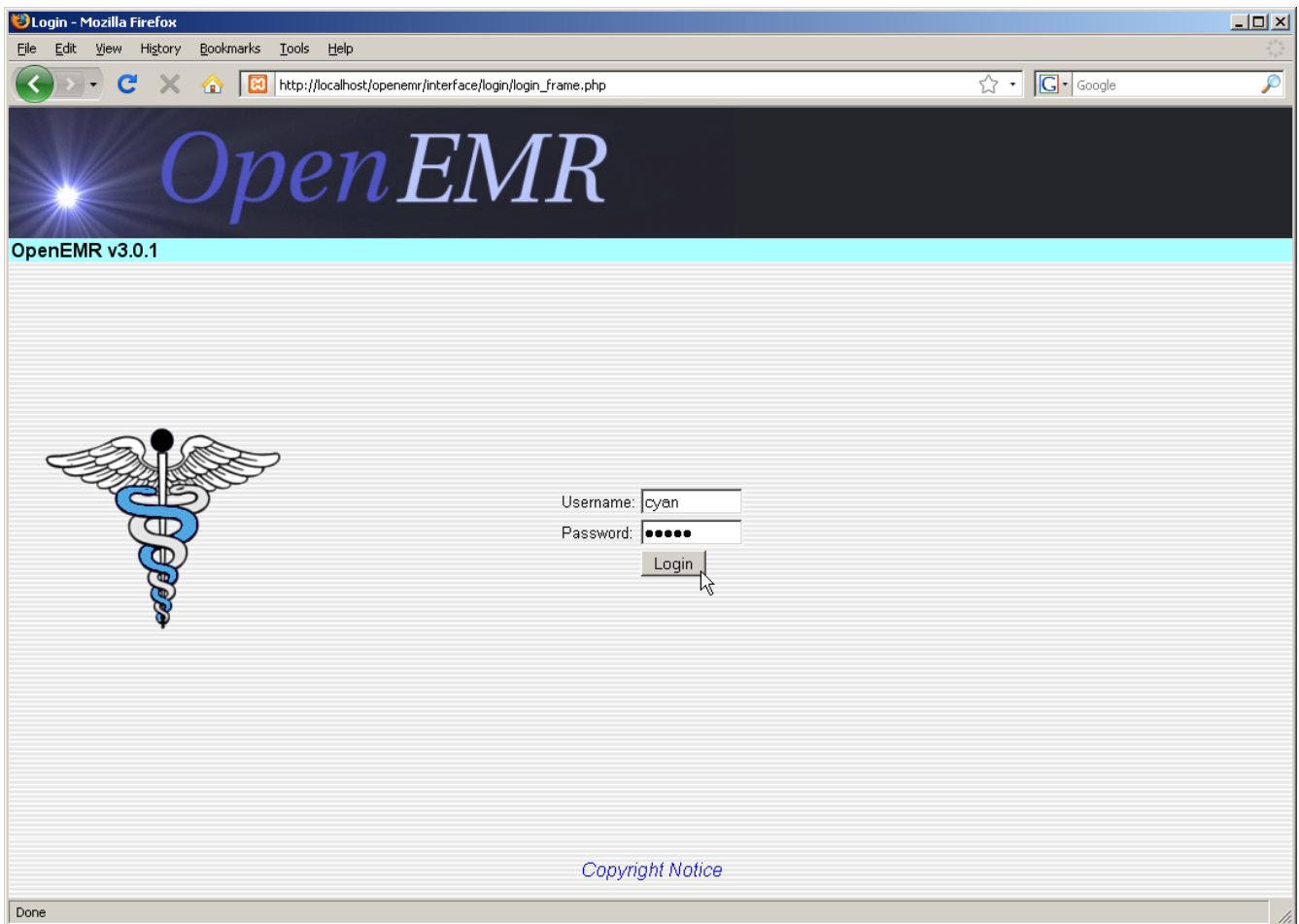
Active Patient:
Rod Roark (1)
 Active Encounter:
None

 Find:
 by: **Name ID**
 SSN DOB
 Logout

Patient Notes [\(See All\)](#) and **Authorizations** [\(More\)](#)

Using The Calendar

In this section we'll discuss setting up a doctor's schedule in the calendar and adding patient appointments.

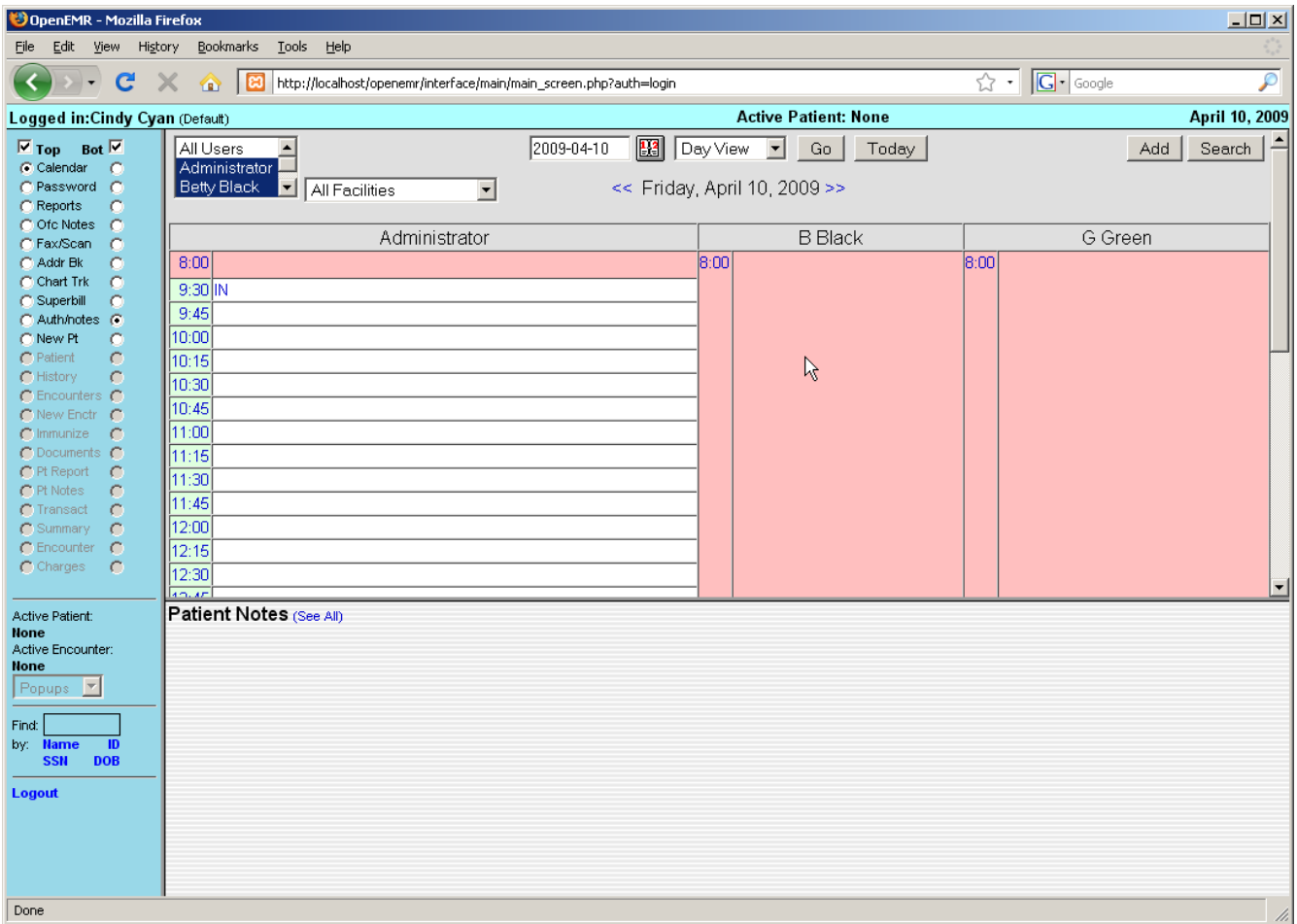


Setting Up Schedules

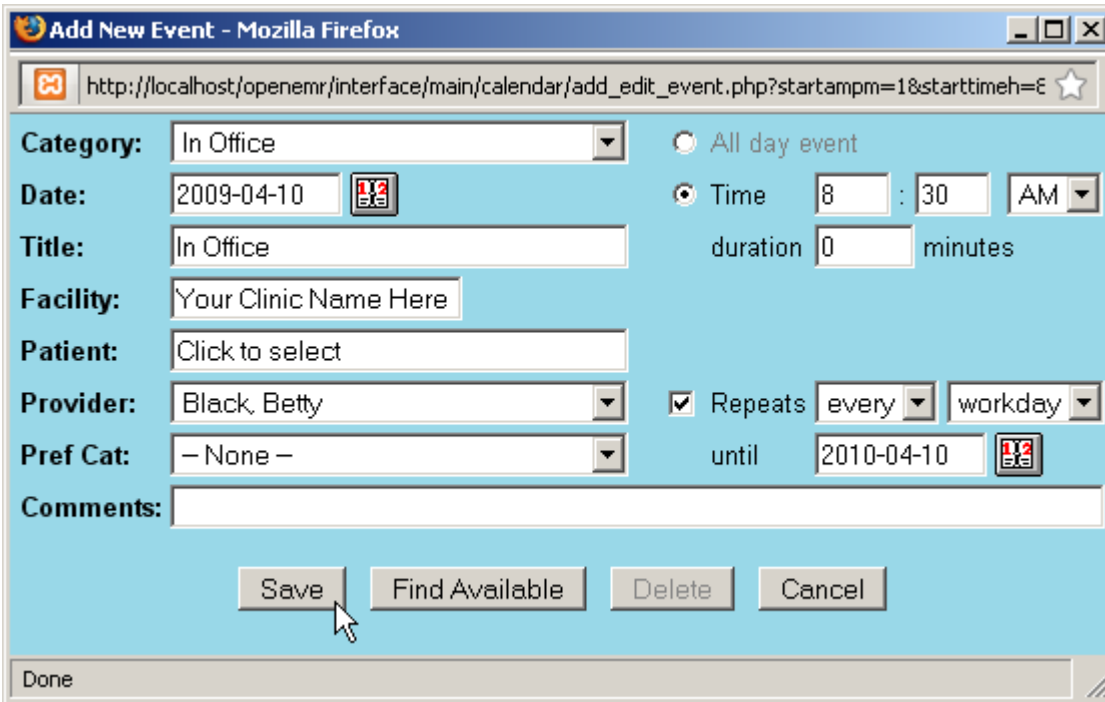
Login to OpenEMR using your assigned username and password.

For users who are not practitioners, such as someone who works at the front desk, the Calendar will show the schedules of all the practitioners at the clinic by default. When you first start using OpenEMR you will need to set up schedules for all of your practitioners.

To do this, click on “8:00” under the Name of the doctor who's schedule you wish to set up.



This will present you with the 'Add New Event' dialog box.



The clinic and provider name should be automatically filled in for you. Set the time at which the doctor arrives by filling in the appropriate time on the right, and choosing "In Office" from the 'Category' drop-down list.

You can also choose to make this a repeating event, which allows you to only have to set up an event once for a given period of time. Do this by selecting the 'Repeats' checkbox, and setting the appropriate frequency & duration.

When you are finished click 'Save' to update the calendar. Now you will see a list of available time slots for that doctor's schedule. Scroll down and click on the time that doctor is scheduled to leave the office for the day.

Add New Event - Mozilla Firefox
http://localhost/openemr/interface/main/calendar/add_edit_event.php?startampm=2&starttimeh=1

Category: Out Of Office All day event
Date: 2009-04-10 Time 5 : 00 PM
Title: Out Of Office duration 0 minutes
Facility: Your Clinic Name Here
Patient: Click to select
Provider: Black, Betty Repeats every workday
Status: until 2010-04-10
Comments:

Save Find Available Delete Cancel

Done

Now the time is automatically selected, as well as the provider and facility information. The same process is used to create a repeating “Out Of Office” event.

Add New Event - Mozilla Firefox
http://localhost/openemr/interface/main/calendar/add_edit_event.php?startampm=2&starttimeh=1

Category: Lunch All day event
Date: 2009-04-10 Time 12 : 00 PM
Title: Lunch duration 60 minutes
Facility: Your Clinic Name Here
Patient: Click to select
Provider: Black, Betty Repeats every workday
Status: until 2010-04-10
Comments:

Save Find Available Delete Cancel

Done

You can also add a lunch break in your practitioners' schedules. This is done the same way, with the exception of the duration, which in this case is non-zero.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: None April 10, 2009

| | Administrator | B Black | G Green |
|---------|---------------|-------------|---------|
| 8:00 | | 8:00 | 8:00 |
| | | 8:30 IN | |
| | | 8:45 | |
| | | 9:00 | |
| | | 9:15 | |
| 9:30 IN | | 9:30 | |
| 9:45 | | 9:45 | |
| 10:00 | | 10:00 | |
| 10:15 | | 10:15 | |
| 10:30 | | 10:30 | |
| 10:45 | | 10:45 | |
| 11:00 | | 11:00 | |
| 11:15 | | 11:15 | |
| 11:30 | | 11:30 | |
| 11:45 | | 11:45 | |
| 12:00 | | 12:00 LUNCH | |
| 12:15 | | | |
| 12:30 | | | |

Active Patient: None
Active Encounter: None
Popups

Find:
by: Name ID
SSH DOB

Logout

Patient Notes (See All)

Done

Now you can see your practitioner's full schedule laid out on the Calendar page. Continue setting up the Calendar in this fashion until all your practitioners' schedules have been entered.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: None April 10, 2009

All Users Administrator Betty Black All Facilities

2009-04-10 Day View Go Today Add Search

<< Friday, April 10, 2009 >>

| | Administrator | B Black | G Green |
|---------|---------------|---------|-------------|
| 8:00 | | 8:00 | 8:00 IN |
| | | 8:15 | 8:15 |
| | | 8:30 IN | 8:30 |
| | | 8:45 | 8:45 |
| | | 9:00 | 9:00 |
| | | 9:15 | 9:15 |
| 9:30 IN | | 9:30 | 9:30 |
| 9:45 | | 9:45 | 9:45 |
| 10:00 | | 10:00 | 10:00 |
| 10:15 | | 10:15 | 10:15 |
| 10:30 | | 10:30 | 10:30 |
| 10:45 | | 10:45 | 10:45 |
| 11:00 | | 11:00 | 11:00 LUNCH |
| 11:15 | | 11:15 | |
| 11:30 | | 11:30 | |

Active Patient: None

Active Encounter: None

Popups

Find:

by: Name ID
SSH DOB

Logout

Patient Notes (See All)

Done

Making Appointments

Now that the clinic and all its practitioners are set up, you can begin scheduling appointments for your patients.

To locate a patient in the system, enter all or part of their name into the search field in the bottom left corner of the screen (below the navigation list) and click 'Name'. This will bring up a list of all the patients in your system matching that name. If you need to narrow the list, you can enter a longer search term, such as their full name (Eg. "rourke, rod").

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: None April 10, 2009

Top Bot

- Calendar
- Password
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: None

Active Encounter: None

Popups

Find: roark

by: [Name](#) [ID](#) [SSN](#) [DOB](#)

[Logout](#)

Showing 1 of 1 records found.

| Name | Phone | SS | DOB | ID | PID | [Number Of Encounters] | [Days Since Last Encounter] | [Date of Last Encounter] | [90 Days From Last Encounter] |
|------------|--------------|-------------|------------|----|-----|------------------------|-----------------------------|--------------------------|-------------------------------|
| Roark, Rod | 503-456-7890 | 111-22-3333 | 08/06/1985 | 1 | 1 | 0 | | | |

Patient Notes [\(See All\)](#)

Done

Click on the desired name to bring up the Demographics summary for that patient. If you have the patient on the phone, now would be a good time to confirm that their contact and insurance information is up to date. If the patient is not already in the system, you can select 'New Pt.' from the menu to begin entering their information.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The browser address bar displays `http://localhost/openemr/interface/main/main_screen.php?auth=login`. The page header indicates the user is logged in as Cindy Cyan, the active patient is Rod Roark (DOB: 1985-08-06, Age: 24), and the date is April 10, 2009.

The main content area is titled "Demographics (More)" and is organized into several sections:

- Who:** Name: Mr. Rod Roark, External ID: 1, Sex: Male, DOB: 1985-08-06, S.S.: 111-22-3333, License/ID: 1234567. A "Balance Due: \$0.00" notice is visible in the top right.
- Marital Status:** Married
- User Defined:** Address: 321 SW Capitol Hwy, City: Portland, State: , Postal Code: 97219, Country: USA, Emergency Contact: Wife, Emergency Phone: 971-222-3333, Home Phone: 503-456-7890, Work Phone: 503-112-3334, Mobile Phone: 971-564-7896.
- Contact:** Contact Email: mr.rod@gmail.com
- Choices:** Provider: Betty Black, Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland, HIPAA Notice Received: YES, Allow Voice Message: YES, Allow Mail Message: NO, Allow SMS: NO, Allow Email: YES, Leave Message With: wife.
- Employer:** Occupation: Engineer, Employer Name: NW Company.

On the right side of the Demographics section, there are links for "Upcoming Appointments" and "New Appointment". A mouse cursor is hovering over the "New Appointment" link.

On the left side, there is a navigation menu with various options like Calendar, Reports, and Patient. Below the menu, there are fields for "Active Patient: Rod Roark (1)", "Active Encounter: None", and a search box with "roark" entered.

The right-hand side of the Demographics summary shows a list of all current and future appointments for that patient. Click 'New Appointment' to schedule an office visit.

The screenshot shows the "Add New Event" dialog box in Mozilla Firefox. The browser address bar displays `http://localhost/openemr/interface/main/calendar/add_edit_event.php?patientid=1`.

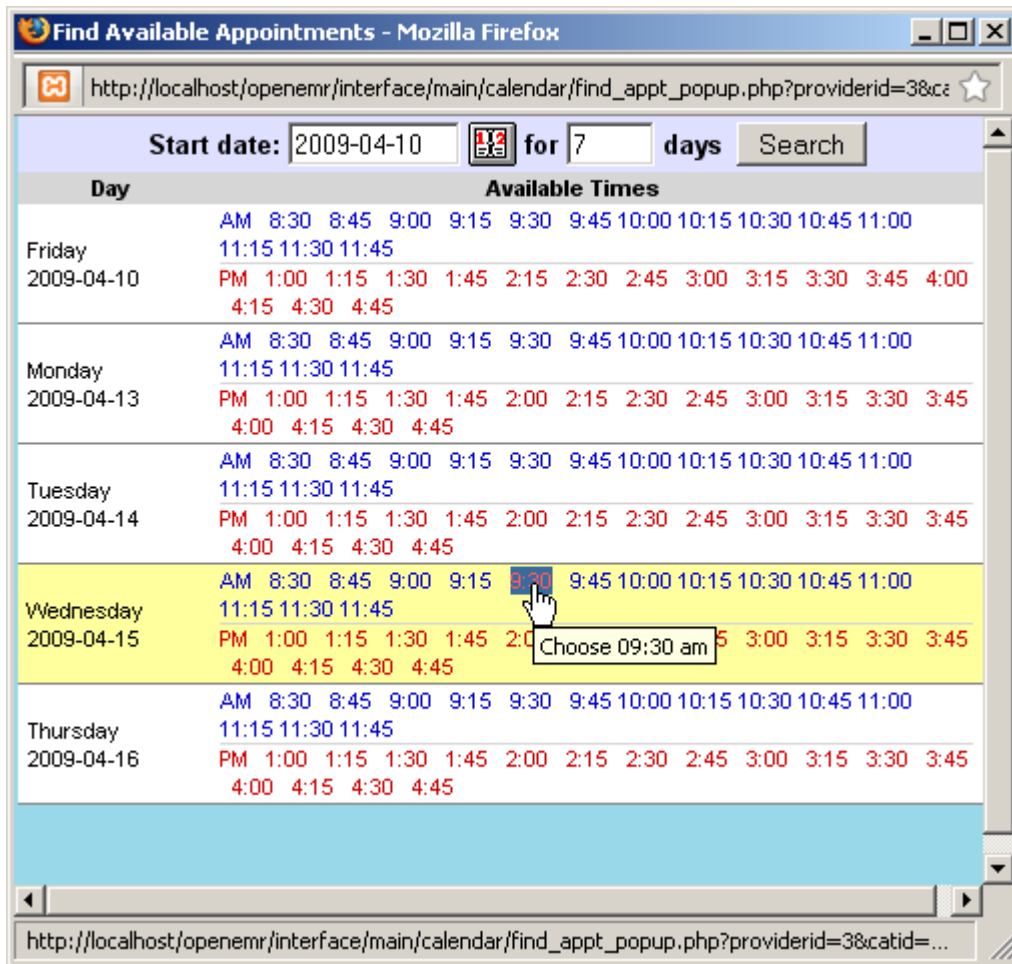
The form contains the following fields and options:

- Category:** Office Visit (dropdown menu)
- Date:** 2009-04-10 (calendar icon)
- Title:** Office Visit (text input)
- Facility:** Your Clinic Name Here (dropdown menu)
- Patient:** Roark, Rod (text input)
- Provider:** Black, Betty (dropdown menu)
- Status:** (dropdown menu)
- Comments:** (text area)
- Event Type:** All day event, Time (5:00 PM)
- Duration:** 15 minutes
- Repeats:** Repeats every day (dropdown menus)

At the bottom of the dialog, there are four buttons: "Save", "Find Available" (with a mouse cursor hovering over it), "Delete", and "Cancel".

This will present you with the same 'Add New Event' dialog used earlier. This time select "Office Visit" as the Category. If a primary provider has been entered for that patient, they will be selected automatically.

Click 'Find Available' to see a list of appointment times available for that provider for the next 7 days. You can change the start date or the number of days shown and click 'Search' to display a new list using those parameters.



Once a date and time have been agreed upon, selecting that time from the list will close the window, and the selected time will appear in the 'Add Event' dialog.

Edit Event - Mozilla Firefox
http://localhost/openemr/interface/main/calendar/add_edit_event.php?eid=14

Category: Office Visit All day event
Date: 2009-04-15 Time 9 : 30 AM
Title: Office Visit duration 15 minutes
Facility: Your Clinic Name Here
Patient: Roark, Rod H=503-456-7890 W=503-112-3334
Provider: Black, Betty Repeats every day
Status: until 0000-00-00
Comments:

Save Find Available Delete Cancel

Last update by Cindy Cyan

Done

Make sure to enter the correct duration for the appointment and click 'Save'.

Return to the calendar using the navigation menu on the left. Advancing to the appropriate date, using the arrows to the right of the current date ('>>'), shows the new appointment listed in the provider's schedule. Mousing over the appointment displays a toot-tip with information about that patient, such as date of birth.

OpenEMR - Mozilla Firefox
 http://localhost/openemr/interface/main/main_screen.php?auth=login
 Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 10, 2009

2009-04-15 Day View Go Today Add Search

| Administrator | B Black | G Green |
|---------------|-----------------|-------------|
| 8:00 | 8:00 | 8:00 IN |
| | 8:30 IN | 8:15 |
| | 8:45 | 8:30 |
| | 9:00 | 8:45 |
| | 9:15 | 9:00 |
| | 9:30 Roark, Rod | 9:15 |
| 9:30 IN | 9:30 | 9:30 |
| 9:45 | 9:45 | 9:45 |
| 10:00 | 10:00 | 10:00 |
| 10:15 | 10:15 | 10:15 |
| 10:30 | 10:30 | 10:30 |
| 10:45 | 10:45 | 10:45 |
| 11:00 | 11:00 | 11:00 LUNCH |
| 11:15 | 11:15 | |

Active Patient: Rod Roark (1)
 Active Encounter: None
 Find: roark
 by: Name ID
 SSI DOB
 Logout

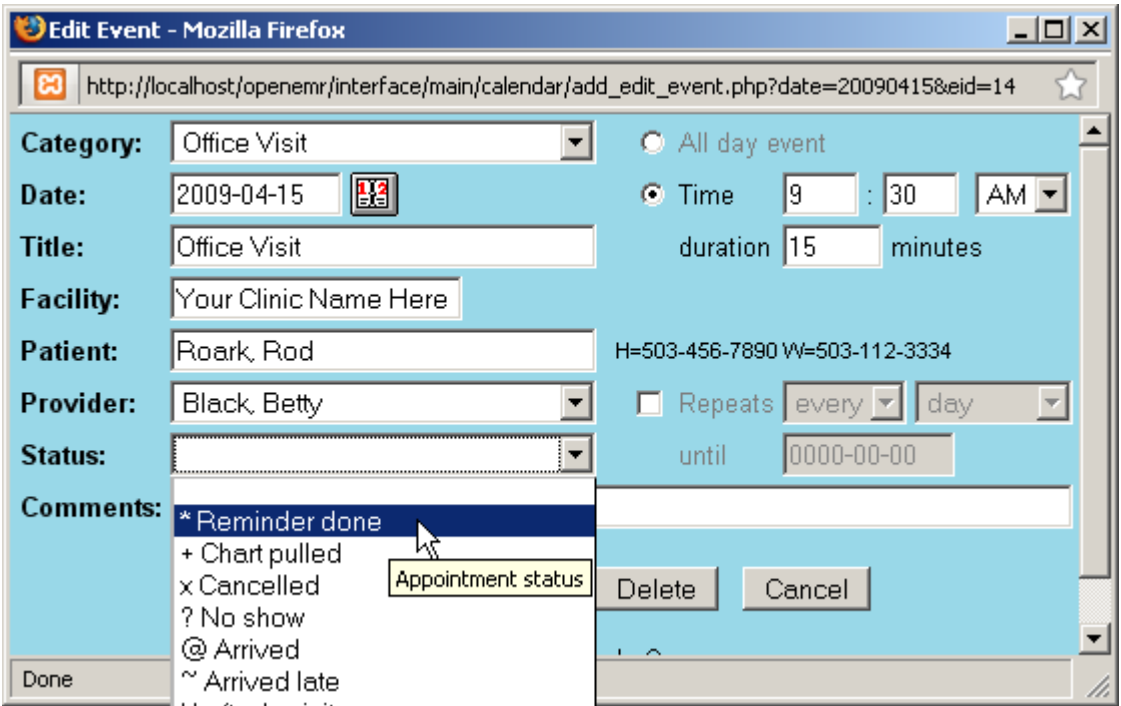
Notes (More)

javascript:goPid(1)

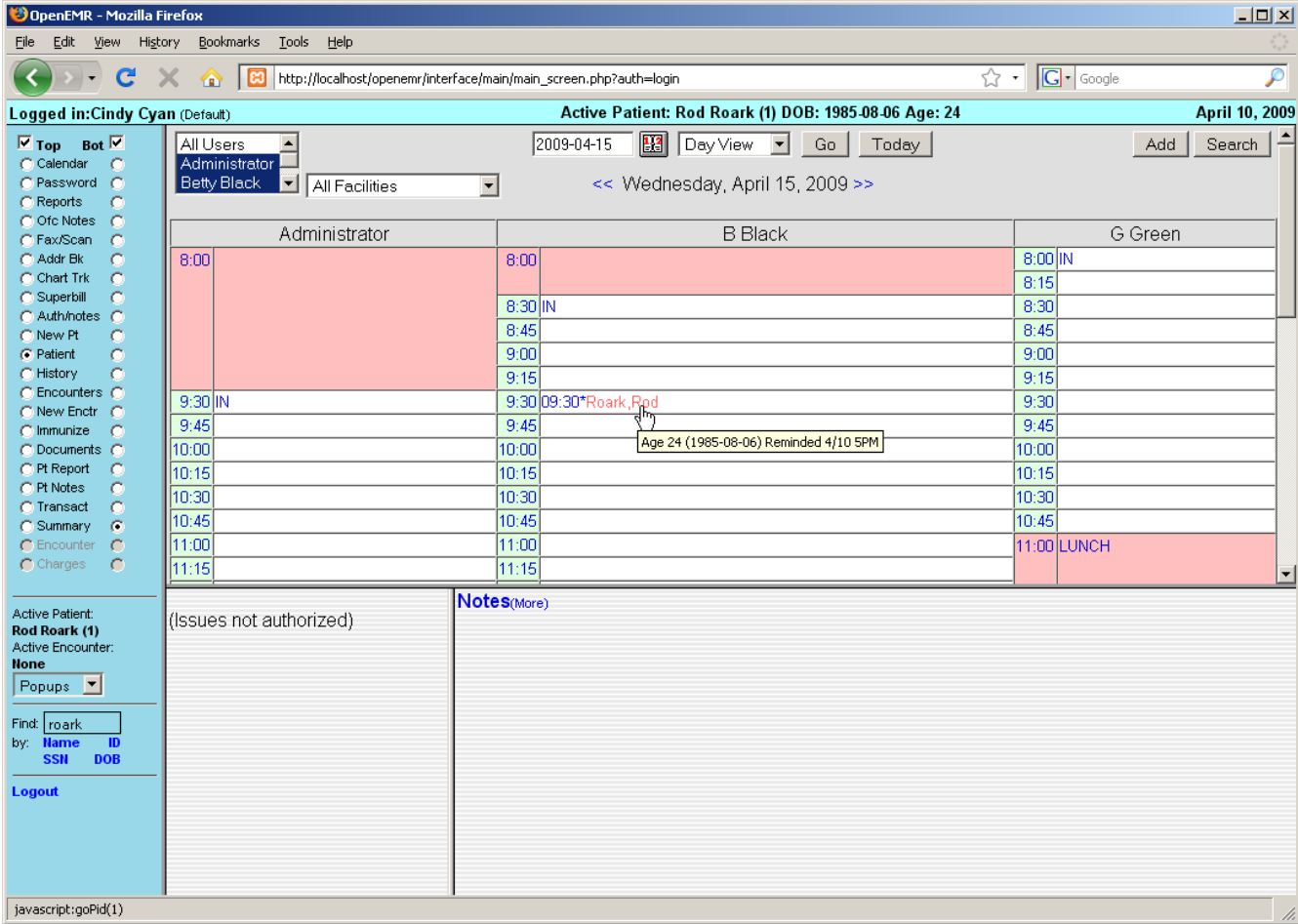
Appointment Status

OpenEMR's calendar system includes a status indicator, allowing doctors and staff to see at a glance what is going on with all appointments and the corresponding encounters for the day.

To change the status of a given appointment, click on the time portion of the appointment line (to the immediate left of the patient's name). This brings up the 'Edit Event' window. Choose the correct appointment status from the drop-down list. Notice each status has a unique symbol associated with it.



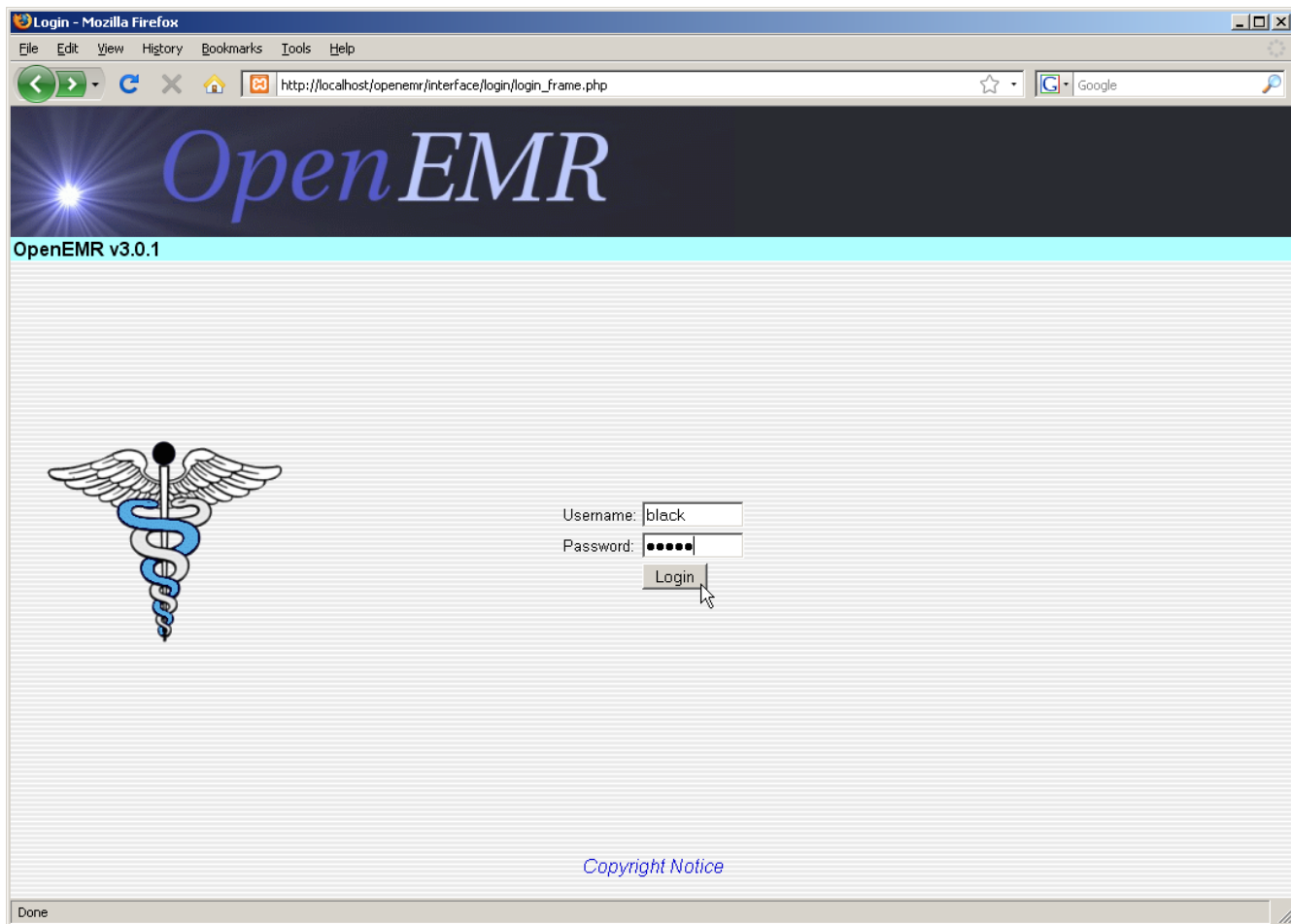
You can also type a note into the 'Comments' line if more information is needed. Click 'Save' to update the status of the appointment.



Mousing over the appointment in the calendar now shows the note that was added to it, and the symbol next to the appointment time has changed to indicate it's new status.

Encounters & Coding

Patient encounters are handled primarily by a clinics providers.



Logging in as a provider presents you with the Calendar page showing only that provider's schedule by default. To view another provider's schedule, select the desired user from the list at the top left of the page and click 'Go'.

The bottom window also shows any notes left for that provider about their patients.

The Calendar shows the appointments scheduled for that day. Providers can see the status of any given appointment, indicated by the symbol show between the appointment time and the patient's name. The “@” symbol, for example, indicates that the patient has arrived at the clinic and is ready to begin their appointment.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: None April 17, 2009

All Users Administrator Betty Black All Facilities 2009-04-15 Day View Go Today Add Search

<< Wednesday, April 15, 2009 >>

B Black

| | |
|-------|-------------|
| 8:00 | |
| 8:30 | IN |
| 8:45 | |
| 9:00 | |
| 9:15 | |
| 9:30 | @Roark, Rod |
| 9:45 | |
| 10:00 | |
| 10:15 | |
| 10:30 | |
| 10:45 | |
| 11:00 | |
| 11:15 | |
| 11:30 | |

Patient Notes (See All) and Authorizations (More)

Active Patient: None
Active Encounter: None
Popups

Find:
by: Name ID
SSH DOB

Logout

Done

Opening a New Encounter

To begin the encounter, click on the patients name in the Appointment Calendar. This brings you to the patient's Demographics page, as well as the Patient Summary page which list any notes specific to that patient, and any medical issues, medications, etc. for that patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567
 Marital Status: Married
 User Defined:

Contact
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Provider: Betty Black

Choices
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife
 Employer Occupation: Engineer Employer Name: NW Company

Medical Problems (More) **Notes (More)**

Immunizations (More)

Prescriptions

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find:
 by: Name ID
 SSH DOB

Logout

Done

Select 'History' from navigation menu to view a summary of the patients Medical History and Lifestyle information. Click 'Patient History / Lifestyle (more)' to enter any information that may be incomplete.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Patient History / Lifestyle (More)

General
Risk Factors:
Exams/Tests: ECG 2/3/2004 Normal
 Prostate Exam 3/4/2005 Normal

Family History
Father: 84 good health
Mother: deceased 45

Relatives
Cancer: paternal aunt
Diabetes: mother
Heart Problems: maternal grandfather
Epilepsy:
Suicide:

Lifestyle
Coffee: 2 cups/day
Alcohol:
Exercise Patterns:
Counseling:

Other
Name/Value:

Medical Problems (More)
Immunizations (More)
Prescriptions

Notes (More)

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find:
 by: Name ID
 SSH DOB

Logout

Done

When you're done, select 'Encounters' from the navigation menu on the left. (In Tree View go to 'Patient/Client – Visits – List') This displays a list of all encounters that have been entered for this patient. For new patients, there may be no encounters listed.

By default, OpenEMR is set to generate an empty Encounter when a patient's status has been set to “Arrived (@)”. To open this encounter and begin entering data, click on the new entry in the Encounters list, then click on 'Patient Encounter' next to the provider's name.

If your clinic's version of OpenEMR is configured differently, you can begin a New Encounter manually by selecting 'New Enctr' (or 'New Visit') from the navigation list on the left.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Past Encounters and Documents (To Billing View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|---|----------|---------|-------------------------|
| 2009-04-17 | | | black | | Primary: Pacific Health |
| 2009-04-10 | | Document: insurance_card.jpg.1 (Insurance Card) | | | |

Top Bot
 Calendar Password
 Reports Otc Notes
 Fax/Scan Addr Bk
 Chart Trk Billing
 Superbill Auth/notes
 New Pt Patient
 History Encounters
 New Enctr Rx
 Issues Immunize
 Documents Pt Report
 Pt Notes Transact
 Summary Encounter
 Charges

Active Patient: Rod Roark (1)
Active Encounter: None
Popups

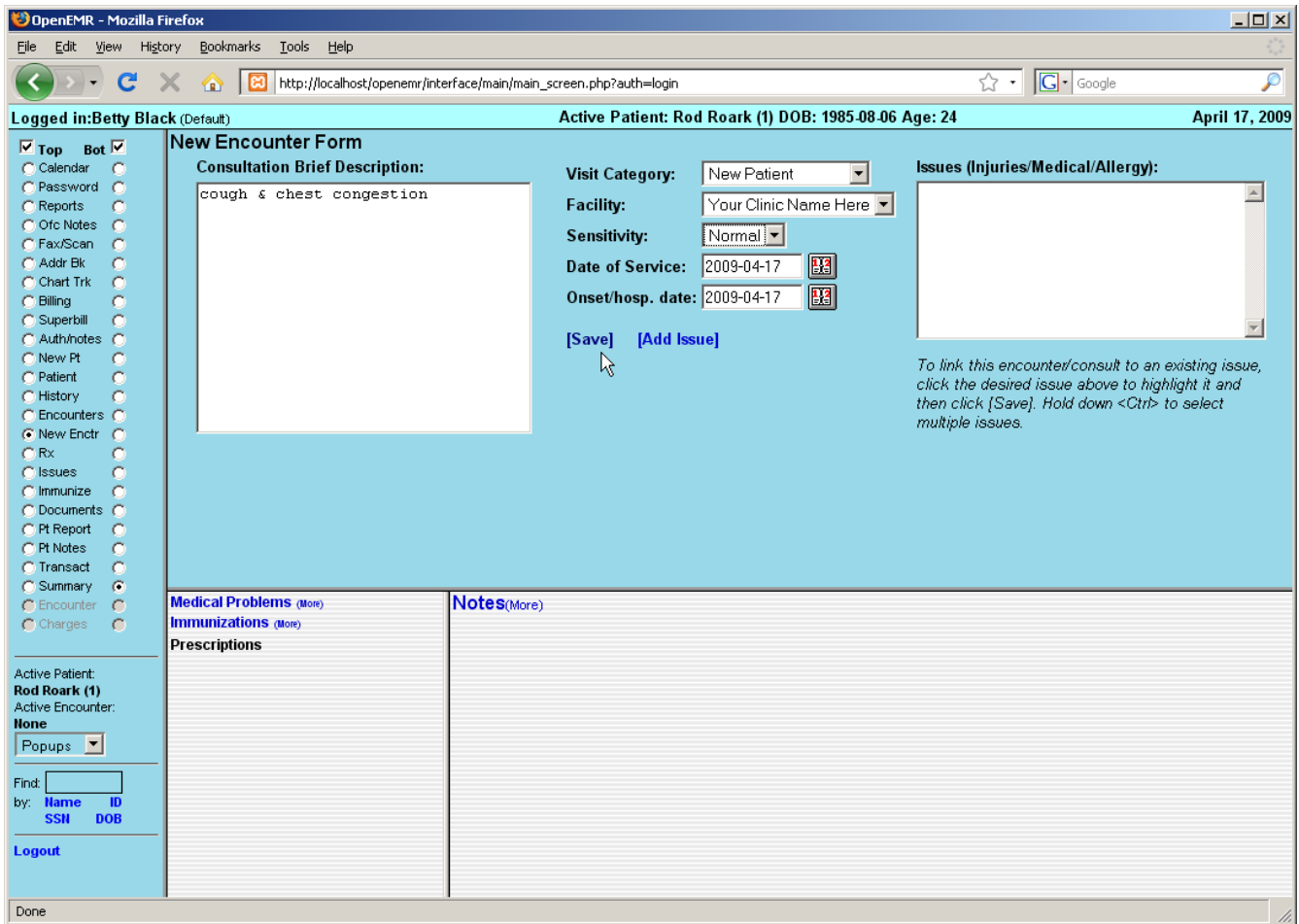
Find:
by: [Name](#) [ID](#)
[SSH](#) [DOB](#)

[Logout](#)

Done

Both methods will bring you to the New Encounter Form.

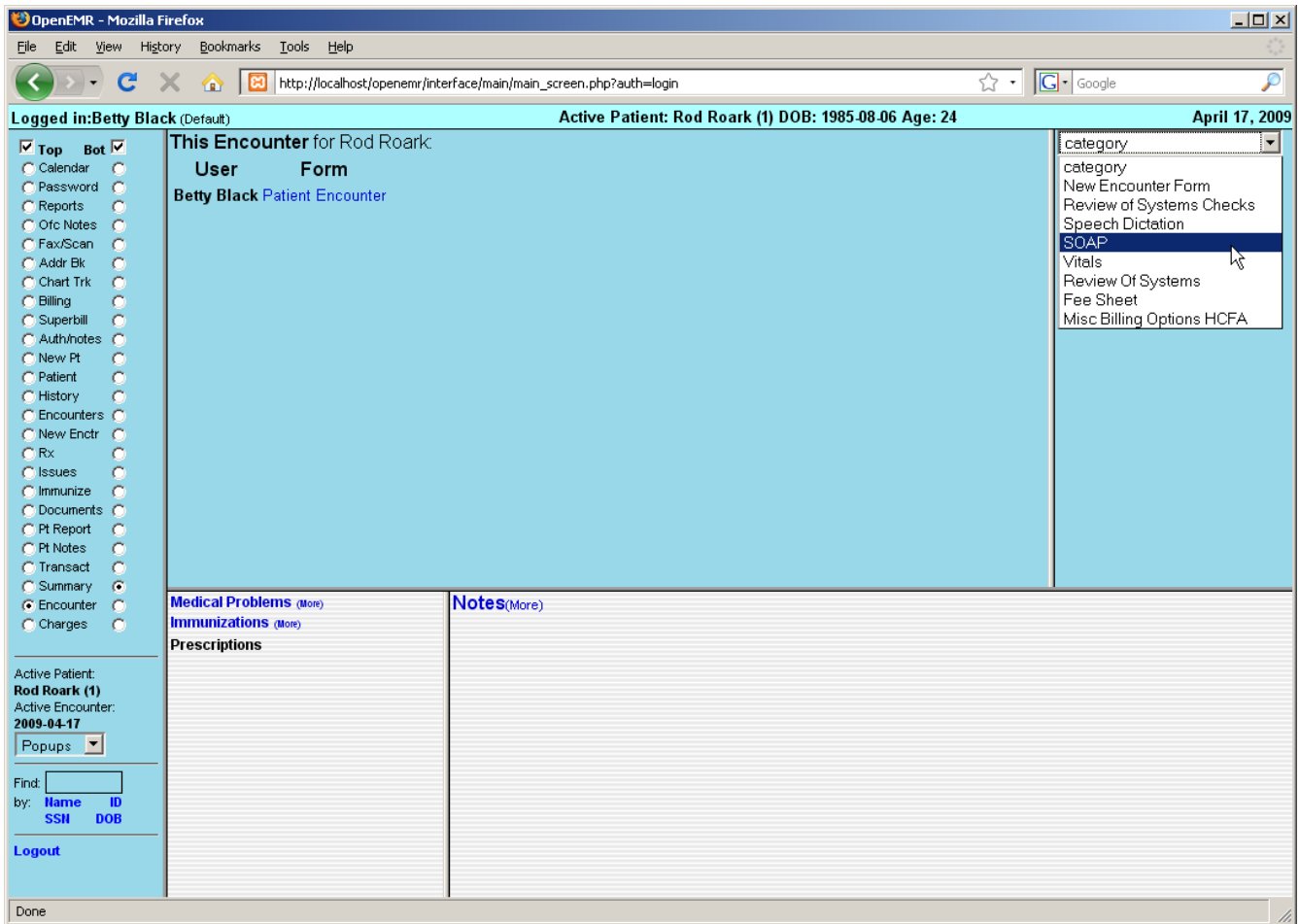
Here you can enter a brief description of the encounter and the date of service. Encounters for new patients will not have any Issues or Diagnoses associated with them at this time, so click 'Save' to continue with the encounter.



Encounter Forms

This will bring you back to the summary page for This Encounter. Displayed is a list of all the forms associated with this encounter. You may click on the name of any of these forms to edit its contents.

To the right is a drop-down list of forms that can be added to the encounter. OpenEMR comes configured with several common encounter forms by default, but your clinic may have their own customized encounter forms as well.



Select 'SOAP' from the drop-down list to add it to the encounter.

The SOAP form will contain a subjective & objective record of the patient's vital information, as well as any notes on the assessment of the patient's health and suggested treatment plans.

The screenshot shows the OpenEMR interface in Mozilla Firefox. The browser title is "OpenEMR - Mozilla Firefox" and the address bar shows "http://localhost/openemr/interface/main/main_screen.php?auth=login". The page header indicates the user is logged in as "Betty Black (Default)", the active patient is "Rod Roark (1)" with a DOB of "1985-08-06" and age of "24", and the date is "April 17, 2009".

The main content area is titled "SOAP" and contains four text input fields:

- Subjective:** "subjective description goes here"
- Objective:** "clinical observations go here"
- Assessment:** "doctor's assessment goes here"
- Plan:** "patient's treatment plan goes here"

At the bottom of the form, there are two buttons: "Save Form" and "[Don't Save]".

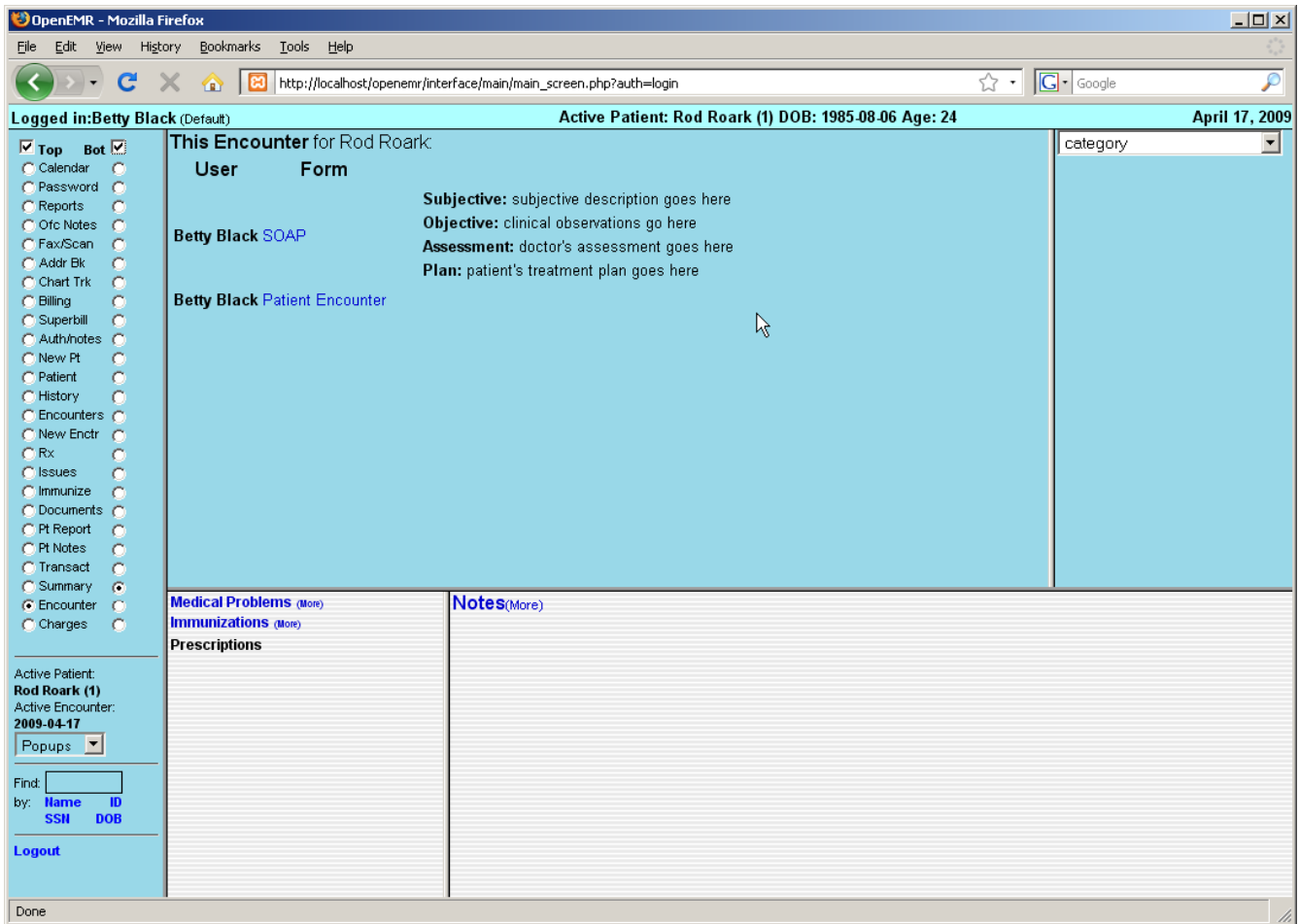
The left sidebar contains a navigation menu with the following items:

- Top Bot
- Calendar
- Password
- Reports
- Otc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Below the menu, the active patient information is displayed: "Active Patient: Rod Roark (1)", "Active Encounter: 2009-04-17", and a "Popups" dropdown menu. There is also a "Find:" search box and a "Logout" link.

Enter the appropriate information and click 'Save Form' to return to the Encounter summary page.

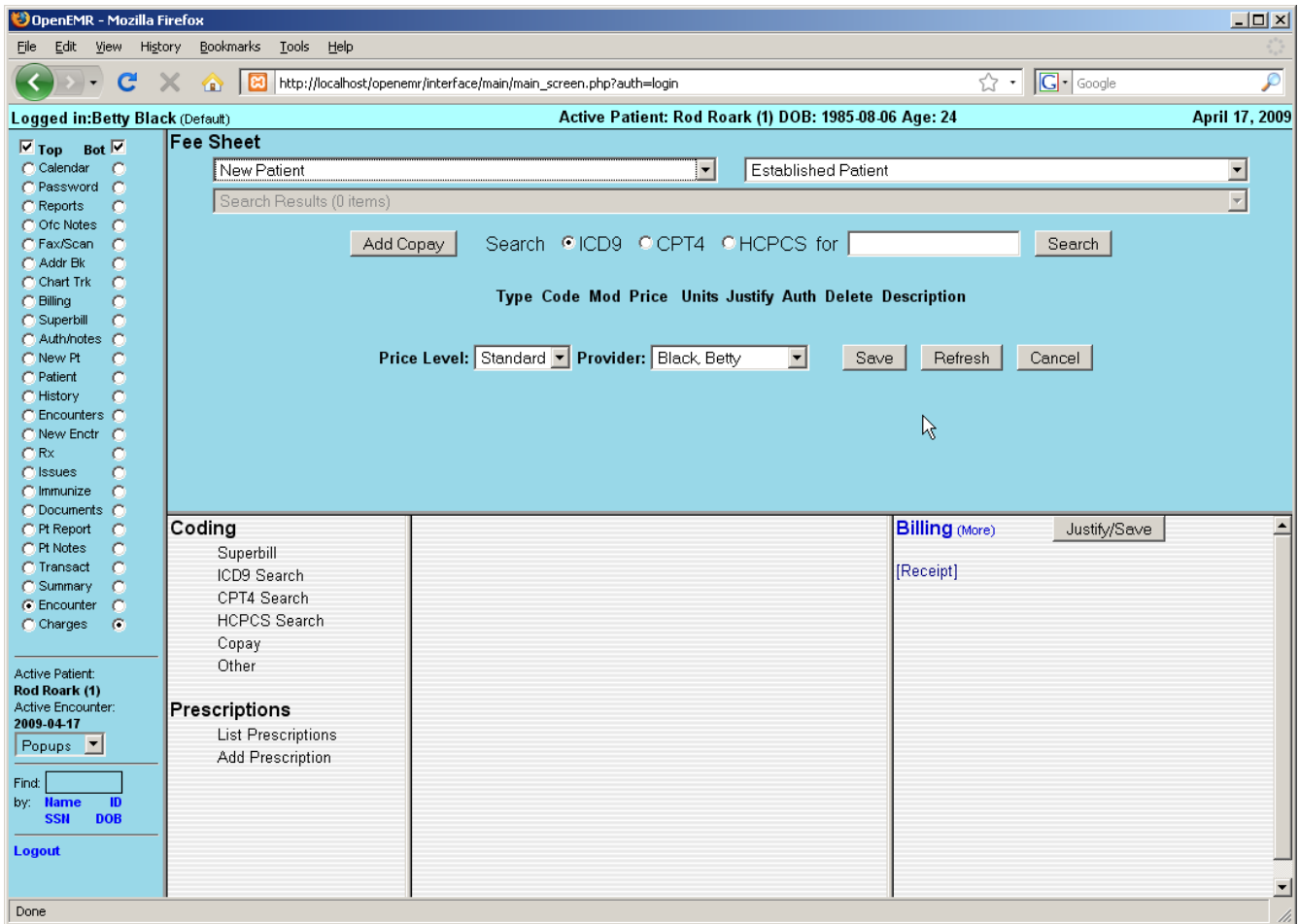
You'll see that the SOAP form has been added to the list of forms for this encounter. Also shown is a summary of its contents.



Using the Fee Sheet

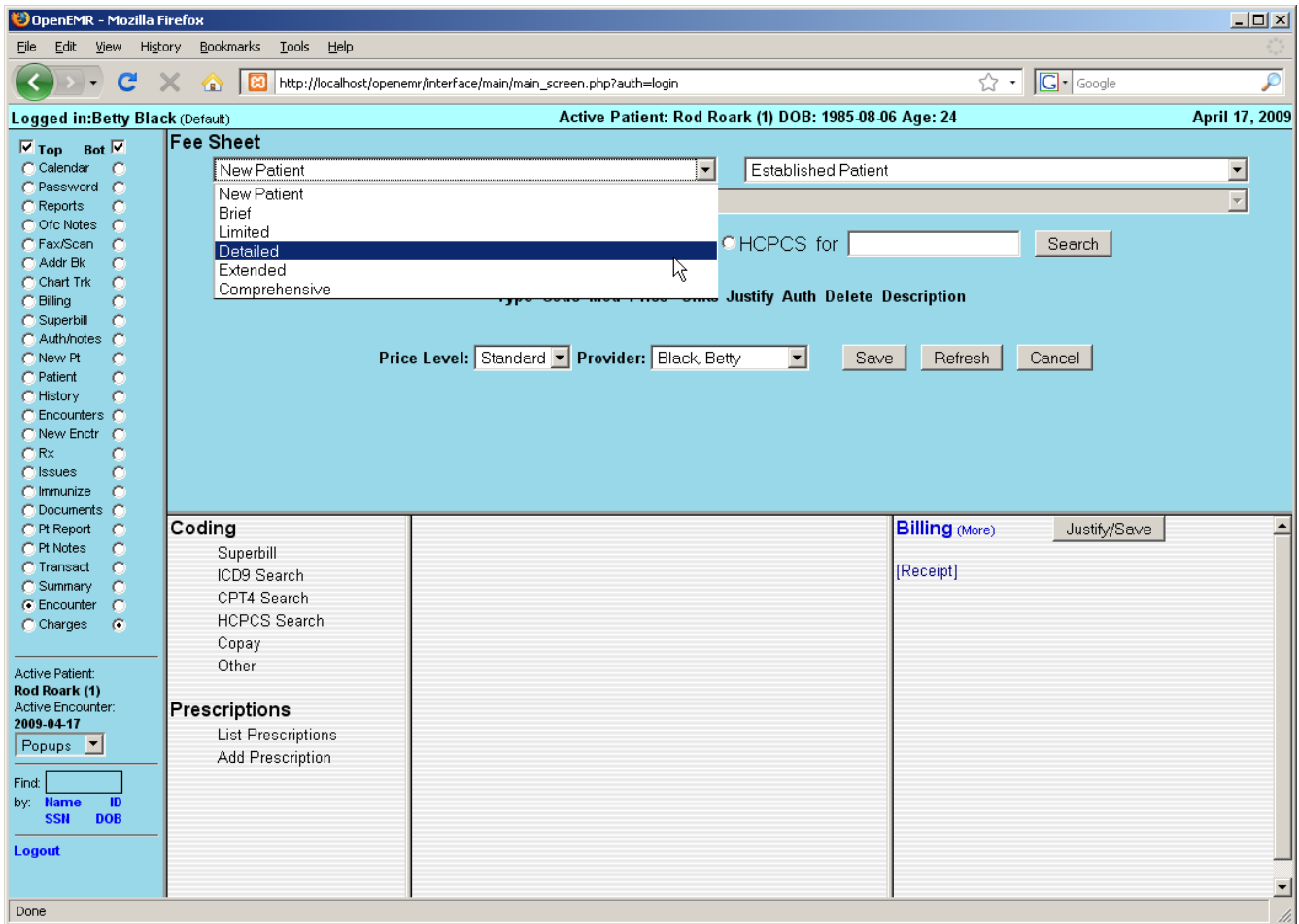
Next select the 'Fee Sheet' from the drop-down list. The Fee Sheet is different from most other forms in that it enters and modifies billing information that is stored elsewhere in the system; it is not really an encounter form, and when used it will not appear in the encounter's list of forms.

You can select 'Charges' (under 'Fees' in tree view) from the navigation menu on the left to see where information from the Fee Sheet will be displayed.



The Fee Sheet includes several drop-down lists of the most commonly used billing codes. It can and should be customized so that it's most suitably adapted to your practice;

Included is a search feature, where you can search for and select from the thousands of billing codes in the database. And below that is a list of all the billing codes, along with their charges and other related information, that have been selected for this encounter.



For example, select 'Detailed' from the “New Patient” drop-down list. The associated CPT code now appears on the list.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Top Bot
 Calendar Password
 Reports Otc Notes
 Fax/Scan Addr Bk
 Chart Trk Billing
 Superbill Auth/notes
 New Pt Patient
 History Encounters
 New Enctr Rx
 Issues Immunize
 Documents Pt Report
 Pt Notes Transact
 Summary Encounter
 Charges

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find:
by: Name ID
 SSN DOB

Logout

Fee Sheet

New Patient Established Patient

Search Results (0 items)

Add Copay Search ICD9 CPT4 HCPCS for Search

| Type | Code | Mod | Price | Units | Justify | Auth | Delete | Description |
|------|-------|----------------------|--------|-------|----------------------|-------------------------------------|--------------------------|-------------|
| CPT4 | 99203 | <input type="text"/> | 136.57 | 1 | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |

Price Level: Standard Provider: Black, Betty Save Refresh Cancel

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

Prescriptions

- List Prescriptions
- Add Prescription

Billing (More)

Justify/Save

[Receipt]

Done

Look for an appropriate billing code by entering a search term in the box to the left of the 'Search' button. Make sure the correct code type is selected and click 'Search'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Top Bot
 Calendar Password
 Reports Otc Notes
 Fax/Scan Addr Bk
 Chart Trk Billing
 Superbill Auth/notes
 New Pt Patient
 History Encounters
 New Enctr Rx
 Issues Immunize
 Documents Pt Report
 Pt Notes Transact
 Summary Encounter
 Charges

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find:
by: Name ID
 SSN DOB

Logout

Fee Sheet

New Patient Established Patient

Search Results (0 items)

Search

| Type | Code | Mod | Price | Units | Justify | Auth | Delete | Description |
|------|-------|----------------------|--------|-------|----------------------|-------------------------------------|--------------------------|-------------|
| CPT4 | 99203 | <input type="text"/> | 136.57 | 1 | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |

Price Level: Provider:

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

Prescriptions

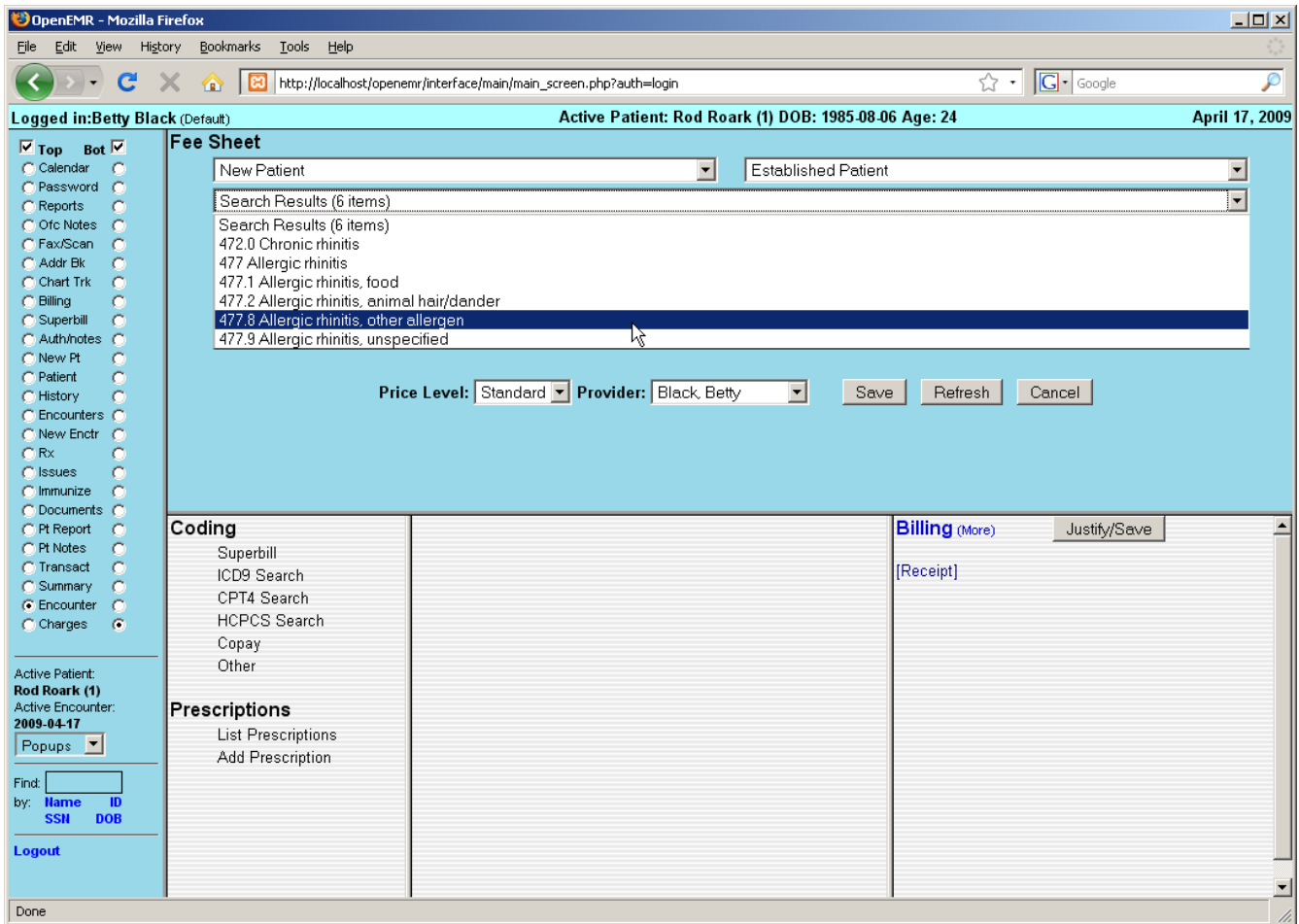
- List Prescriptions
- Add Prescription

Billing (More)

[Receipt]

Done

A drop-down list will then be populated with any billing codes that match your search parameters. Selecting the desired code from the list will add it to the list of codes for this encounter.



The Fee Sheet also allows you to justify the selected codes for billing purposes. Justification is the association of ICD9 codes with procedure codes. Insurance companies require this for billing, in order to "justify" paying for procedures.

To do this, click the drop-down menu under 'Justify' for the desired CPT code. Select the appropriate ICD9 code from the list and click 'Save'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Top Bot

- Calendar
- Password
- Reports
- Otc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find:
by: Name ID
SSH DOB

Logout

Fee Sheet

New Patient Established Patient

Search Results (0 items)

ICD9 CPT4 HCPCS for

| Type | Code | Mod | Price | Units | Justify | Auth | Delete | Description |
|------|-------|----------------------|--------|-------|---------|-------------------------------------|--------------------------|-----------------------------------|
| CPT4 | 99203 | <input type="text"/> | 136.57 | 1 | 477.8 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| ICD9 | 477.8 | <input type="text"/> | | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Allergic rhinitis, other allergen |

Price Level: Standard Provider: Black, Betty

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

Prescriptions

- List Prescriptions
- Add Prescription

Billing (More)

[Receipt]

Done

To see the Feet Sheet has been associated with this encounter, click 'Encounters' in the navigation menu to go to the list of encounters for this patient. You can see that the CPT & ICD9 codes are listed next to the new encounter, as well as the SOAP form that was added earlier.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Top Bot

- Calendar
- Password
- Reports
- Otc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find:
by: Name ID
 SSN DOB

[Logout](#)

This Encounter for Rod Roark

User Form

Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Betty Black SOAP

Betty Black Patient Encounter

Past Encounters and Documents (To Billing View)

| Date | Issue | Reason/Form | Provider | Billing | Insurance |
|------------|-------|---|----------|----------------|-------------------------------------|
| 2009-04-17 | | cough & chest congestion SOAP | black | 99203 477.8 | Primary: Pacific Health |
| 2009-04-10 | | Document: insurance_card.jpg.1 (Insurance Card) | | | View encounter 1.23 |

Done

Return to the Charges page to see a more detailed view of billing codes for this encounter. If you did not justify these codes in the previous step, you can do so now by selecting the checkboxes next to the codes you wish to associate and click 'Justify/Save'. This will also refresh the display in the Billing window.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

This Encounter for Rod Roark

User Form

Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Betty Black SOAP

Betty Black Patient Encounter

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPCS Search
- Copay
- Other

Prescriptions

- List Prescriptions
- Add Prescription

Billing (More) Justify/Save

[Receipt]

CPT4 99203 136.57
total: 136.57

ICD9 477.8 Allergic Rhinitis, Other Allergen

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find:
by: Name ID
SSH DOB

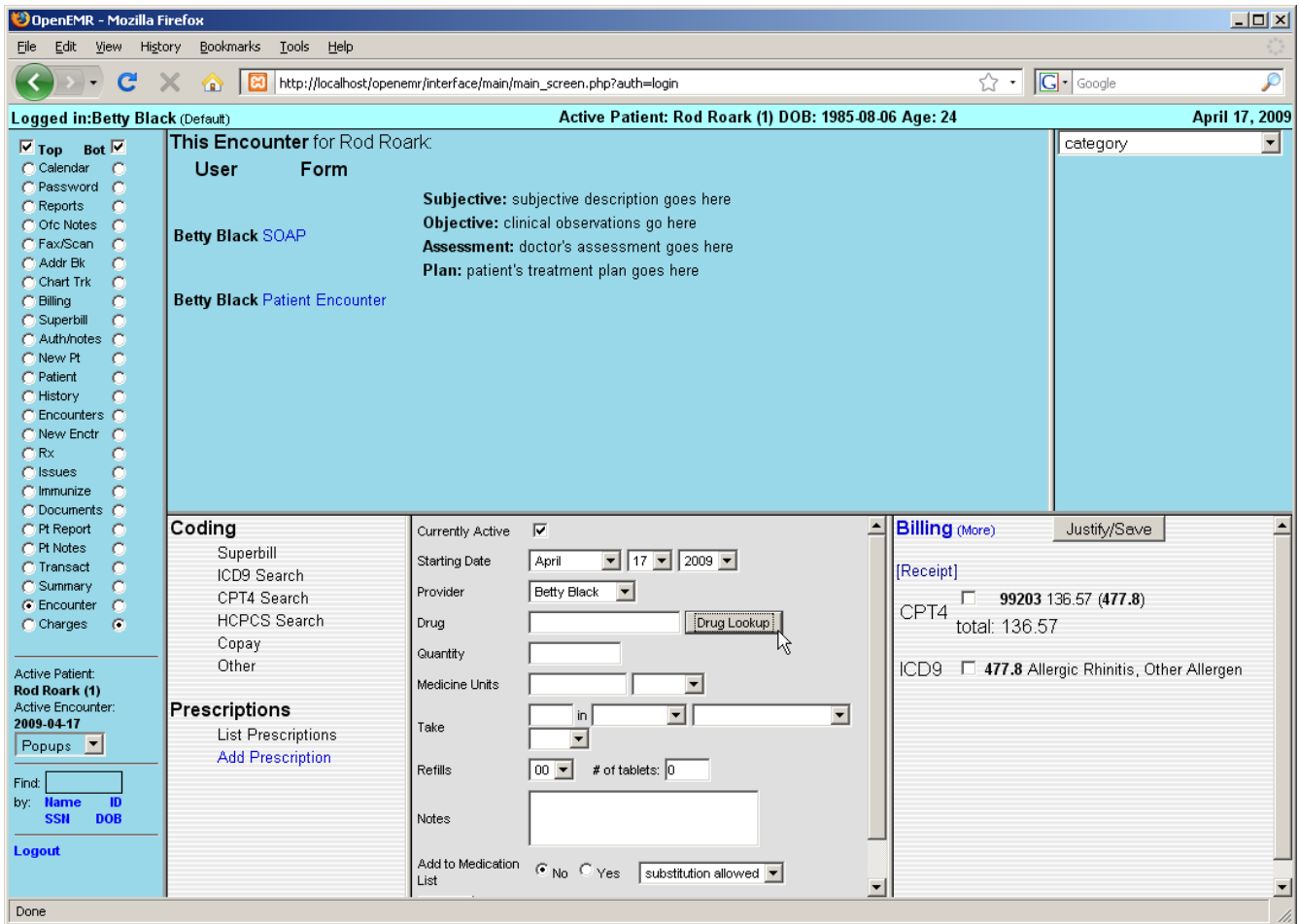
Logout

Done

You can see that the ICD9 code has now been associated with the appropriate CPT procedure, as indicated by the code in parentheses to the right.

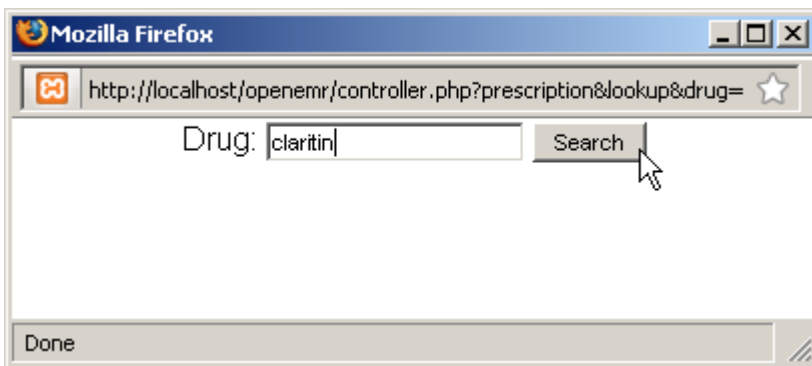
Adding Prescriptions

To prescribe medication for this patient select 'Rx' from the navigation menu on the left (under 'Patient/Client – Medical Record' in Tree View) and click 'Add Prescription'.

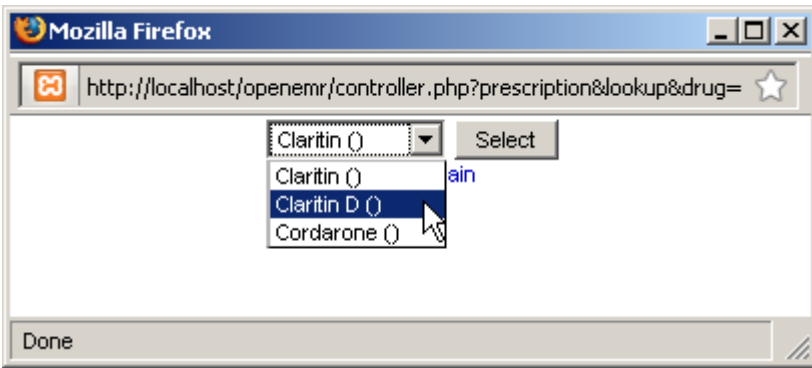


This presents you with a form for entering prescription data, including dosage, refills, and whether or not generic over-the-counter substitutions are allowed for this patient.

The Prescription form includes a search function for looking up a particular type of medication. To use this function click 'Drug Lookup'. A box will pop up into which a search term may be entered.

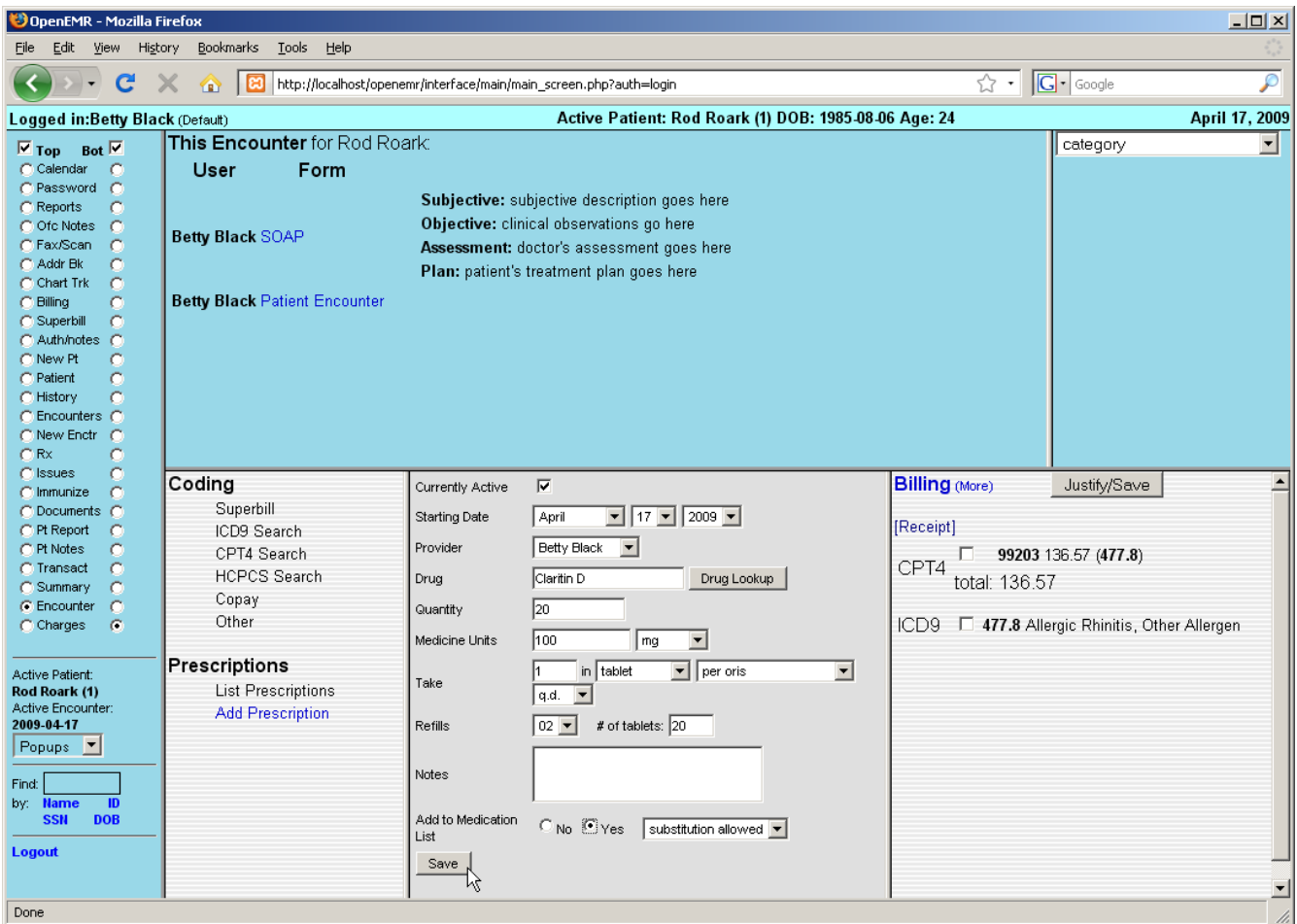


Clicking 'Search' displays a drop-down list of possible medications generated by connecting to the web site www.rxlist.com.



Select the desired medication to return to the Prescription form. The selected medication has now been filled in for you. Also, clicking 'Yes' next to "Add to Medication List" will allow the prescription to be included in the Issues list as a Medication.

Enter the correct data to complete the form and click 'Save'.



You are then presented with a form for generating a PDF of the prescription information. It may be printed or sent by email or fax. "Auto Send" will use whichever default method was selected when you set up the pharmacy.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 17, 2009

Top Bot

- Calendar
- Password
- Reports
- Otc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: Rod Roark (1)
Active Encounter: 2009-04-17
Popups

Find:
by: Name ID
SSH DOB

Logout

Done

This Encounter for Rod Roark

User Form

Betty Black SOAP

Betty Black Patient Encounter

Subjective: subjective description goes here
Objective: clinical observations go here
Assessment: doctor's assessment goes here
Plan: patient's treatment plan goes here

Coding

- Superbill
- ICD9 Search
- CPT4 Search
- HCPSC Search
- Copay
- Other

Print

Email

Fax 503-987-6544

Auto Send Corner Pharmacy Portland, OR

Prescriptions

- List Prescriptions
- Add Prescription

Billing (More) Justify/Save


[Receipt]

CPT4 99203 136.57 (477.8)
total: 136.57

ICD9 477.8 Allergic Rhinitis, Other Allergen

Clicking 'Print (PDF)' will generate the following PDF document to be saved or printed as necessary. The default template for this form may also be customized to your clinic's own specifications.

controller.php (application/pdf Object) - Mozilla Firefox
File Edit View History Bookmarks Tools Help
http://localhost/openemr/controller.php?prescription&send&id=25
OpenEMR controller.php (application/pdf O...
1 / 1 75% Sign Find
Done



Your Clinic Name Here
1234 SW Main St
Portland, OR 97205
Tel: 503-123-4567
Fax: 503-123-4568

Betty Black
DEA: _____

| | |
|---|--|
| <small>Patient Name & Address</small> Rod Roark 321 SW Capitol Hwy Portland, 97219 503-456-7890 | <small>Date of Birth</small> 08/06/1985 |
|---|--|

Prescriptions

Rx: Claritin D 100 mg [tablet] *substitution allowed*
Disp #: 20
Sig: 1 tablet per oris q.d.

Refills: 2 of quantity 20

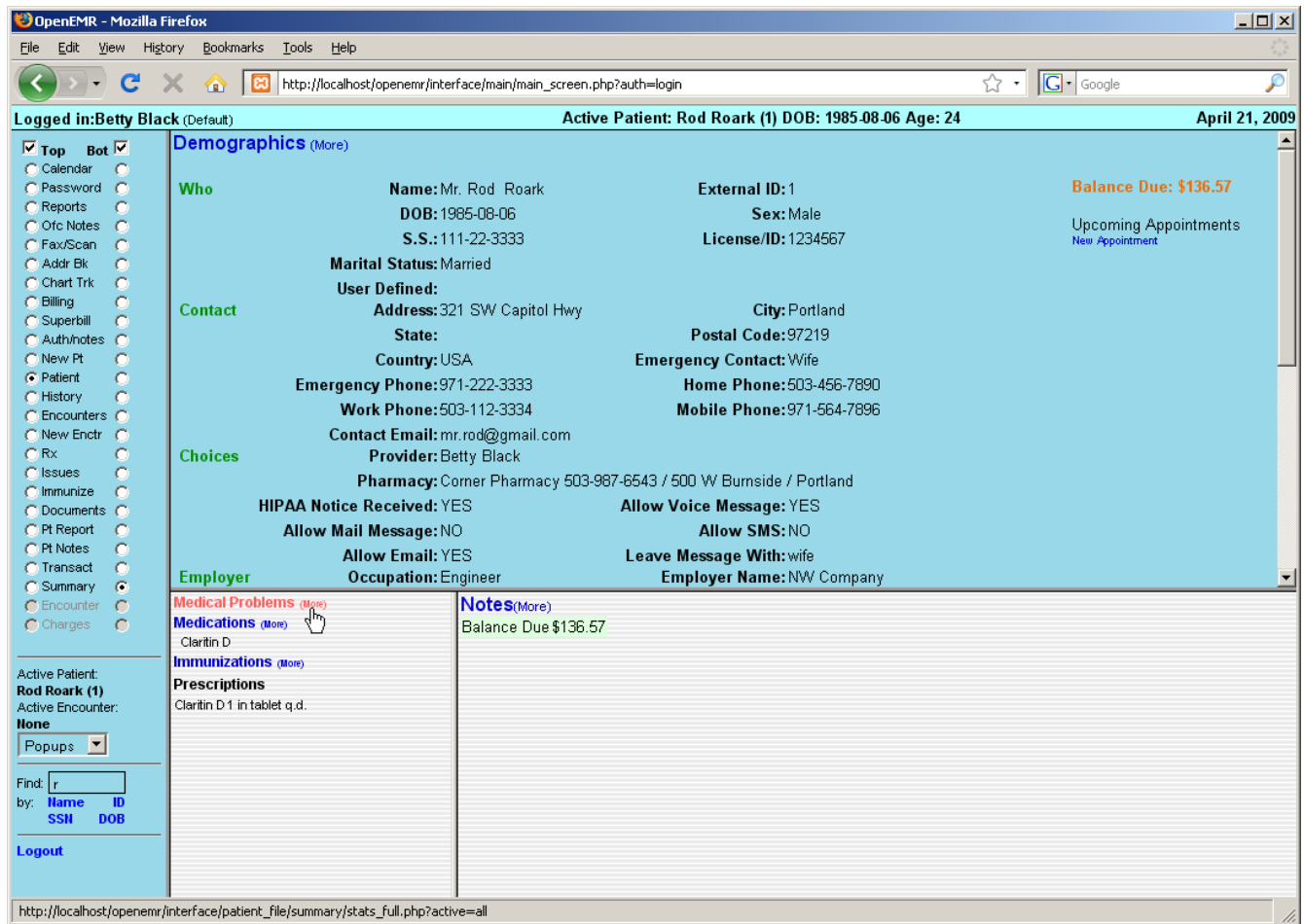
Signature: _____
Date: 2009-04-17

Issues & Immunizations

Adding Issues

An "issue" is a medical problem, allergy, medication, surgery or dental issue. These issues are related in that they can all be associated with multiple encounters.

This is especially useful with medical problems, where the user may want to quickly determine which encounters treated a particular problem, or which problems were treated by a particular encounter.



From the patient's Summary page click 'Medical Problems (more)', or select 'Issues' from the navigation menu on the left ('Patient/Client – Medical Record – Issues') to display the Issues list.

You can now see the prescription added earlier has been included in the Issues list as a Medication. Click 'Add Issue' to add a new medical issue you want kept track of for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Provider: Betty Black
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife
 Occupation: Engineer Employer Name: NW Company

Contact

Choices

Employer

| Type | Title | Begin | End | Diag | Occurrence | Referred By | Comments | Enc |
|--------------------|------------|------------|-----|------|----------------|-------------|----------|-----|
| Medications | | | | | | | | |
| | Claritin D | 2009-04-17 | | | Unknown or N/A | | | 0 |

Add Issue Add Encounter To History Back

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find:
 by: Name ID
 SSH DOB

Logout

Done

This pops up the 'Add Issue' dialog box.

The default issue type is set to 'Problem'. For each issue type there is a list of commonly selected titles which are customizable for your clinic's specific needs. If the desired title is not included, it can be typed into the text box below the list.

Enter the appropriate beginning and end dates, and select the 'Occurrence' from the drop-down list provided.

Add NewIssue - Mozilla Firefox
http://localhost/openemr/interface/patient_file/summary/add_edit_issue.php?issue=0

Type: Problem Allergy Medication Surgery Dental

HTN
asthma
diabetes
hyperlipidemia (Select one of these, or type your own title)

Title: bronchitis

Begin Date: 2009-04-17

End Date: (leave blank if still active)

Diagnosis:

Occurrence: Chronic/Recurrent

Referred by: Unknown or N/A
First

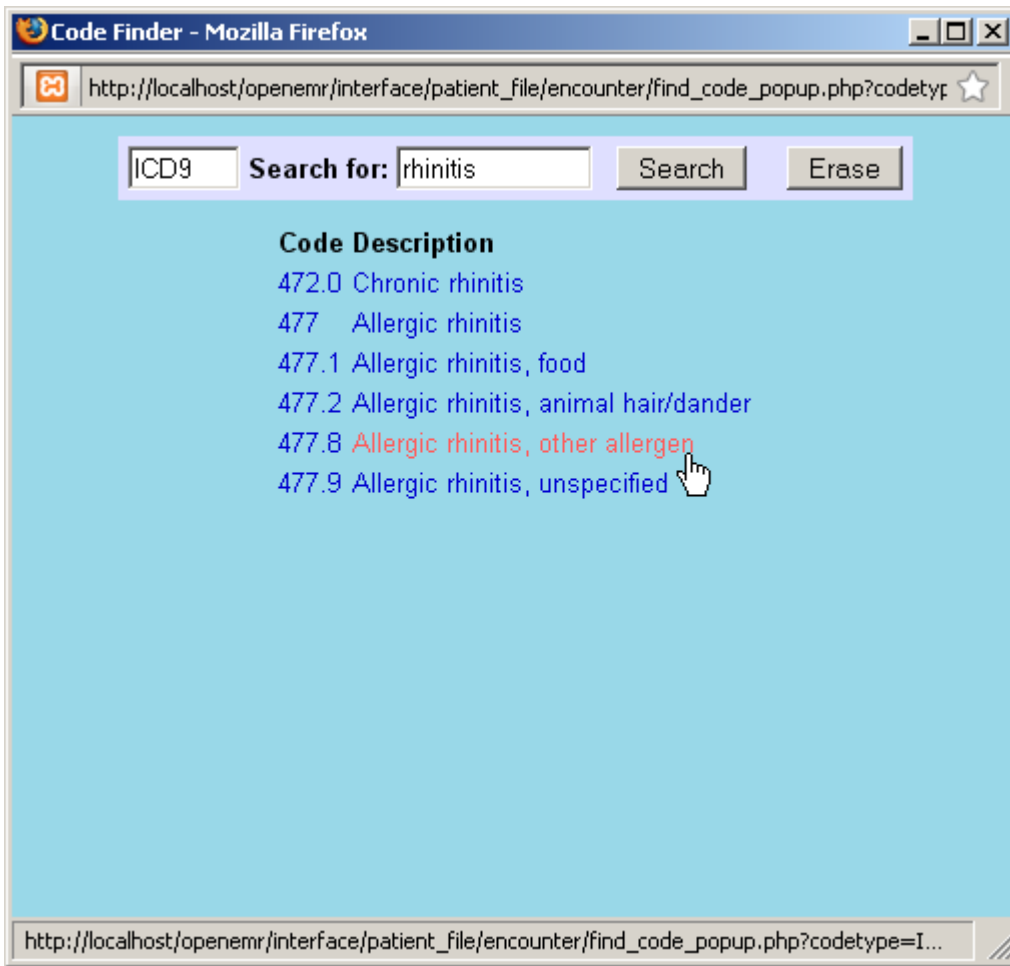
Outcome: us quo Worse Pending followup

Destination: Late Recurrence (2-12 Mo)
Delayed Recurrence (> 12 Mo)
Chronic/Recurrent
Acute on Chronic

cancel

Done

Clicking in the 'Diagnosis' field will present a search dialog for locating the correct ICD9 code for this issue. Enter the appropriate search term and click 'Search' to bring up a list of possible ICD9 codes. Selecting the desired code will close the search window and enter the selected code in the text field.



Complete the remainder of the form as necessary and click 'Save'.

Add New Issue - Mozilla Firefox

http://localhost/openemr/interface/patient_file/summary/add_edit_issue.php?issue=0

Type: Problem Allergy Medication Surgery Dental

HTN
asthma
diabetes
hyperlipidemia (Select one of these, or type your own title)

Title: bronchitis

Begin Date: 2009-04-17

End Date: (leave blank if still active)

Diagnosis: ICD9:477.8

Occurrence: Chronic/Recurrent

Referred by:

Outcome: Resolved Improved Status quo Worse Pending followup

Destination:

Save Cancel

Done

Additional issues are entered in the same manner; clicking 'Add Issue' and selecting the appropriate type, such as 'Allergy'. Notice that the 'Add New Issue' dialog also uses the OpenEMR date selection tool described earlier.

Add NewIssue - Mozilla Firefox

http://localhost/openemr/interface/patient_file/summary/add_edit_issue.php?issue=0

Type: Problem Allergy Medication Surgery Dental

penicillin
sulfa
iodine
codeine (Select one of these, or type your own title)

Title: penicillin

Begin Date: 2009-01-01

End Date:

Diagnosis:

Occurrence: Unknown or N/A

Referred by:

Outcome: Resolved Pending followup

Destination:

| January, 2009 | | | | | | | |
|---------------|-----|-----|-----|-----|-----|-----|-----|
| Today | | | | | | | |
| ? | < | > | < | > | < | > | |
| wk | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
| 52 | | | | | 1 | 2 | 3 |
| 1 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 3 | 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 4 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| Thu, Jan 1 | | | | | | | |

Done

Once the new issues have been added successfully you should see an updated list of all the issues that have been entered for this patient. You may click on an issue in the list at any time to edit it.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male Upcoming Appointments
 S.S.: 111-22-3333 License/ID: 1234567 New Appointment

Contact
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com

Choices
 Provider: Betty Black
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife
 Employer Name: NW Company

Employer
 Occupation: Engineer

| Type | Title | Begin | End | Diag | Occurrence | Referred By | Comments | Enc |
|-------------------------|------------|------------|-----|--|-------------------|-------------|----------|-----|
| Allergies | | | | | | | | |
| | penicillin | 2009-01-01 | | | Unknown or N/A | | | 0 |
| Medical Problems | | | | | | | | |
| | bronchitis | 2009-04-17 | | ICD9:477.8 (Allergic rhinitis, other allergen) | Chronic/Recurrent | | | 0 |
| Medications | | | | | | | | |
| | Claritin D | 2009-04-17 | | | Unknown or N/A | | | 0 |

Add Issue Add Encounter To History Back

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups
 Find:
 by: Name ID
 SSH DOB
 Logout

Associating Issues with Encounters

The far right column in the Issues list represents the number of encounters associated with a given issue. Click on the '0' next to a newly added issue to bring up the 'Issues & Encounters' dialog.

This dialog contains a list of all the issues and encounters associated with this patient. It is used to set (and view) the relationships between issues and encounters. Note that the issue that was just clicked on has been highlighted.

Issues and Encounters - Mozilla Firefox

http://localhost/openemr/interface/patient_file/problem_encounter.php?issue=11

Issues and Encounters for Rod Roark (1)

| <input checked="" type="radio"/> Issues Section | | | <input type="radio"/> Encounters Section | |
|---|------------|-------------|--|--------------------------|
| Type | Title | Description | Date | Presenting Complaint |
| allergy | penicillin | | 2009-04-17 | cough & chest congestion |
| medical_problem | bronchitis | | | |
| medication | Claritin D | | | |

Instructions: Choose a section and click an item within it; then in the other section you will see the related items highlighted, and you can click in that section to add and delete relationships.

Done

Select the appropriate encounter from the list on the right to highlight it. Clicking 'Save' now links the selected issue to the selected encounter.

Issues and Encounters - Mozilla Firefox

http://localhost/openemr/interface/patient_file/problem_encounter.php?issue=11

Issues and Encounters for Rod Roark (1)

| <input checked="" type="radio"/> Issues Section | | | <input type="radio"/> Encounters Section | |
|---|------------|-------------|--|--------------------------|
| Type | Title | Description | Date | Presenting Complaint |
| allergy | penicillin | | 2009-04-17 | cough & chest congestion |
| medical_problem | bronchitis | | | |
| medication | Claritin D | | | |

Instructions: Choose a section and click an item within it; then in the other section you will see the related items highlighted, and you can click in that section to add and delete relationships.

Done

Continue associating issues with encounters as necessary. Refreshing the Issues list shows the current information for all issues.

OpenEMR - Mozilla Firefox
 http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Provider: Betty Black

Contact

Choices
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife
 Occupation: Engineer Employer Name: NW Company

Employer

| Type | Title | Begin | End | Diag | Occurrence | Referred By | Comments | Enc |
|-------------------------|------------|------------|-----|--|-------------------|-------------|----------|-----|
| Allergies | | | | | | | | |
| | penicillin | 2009-01-01 | | | Unknown or N/A | | | 0 |
| Medical Problems | | | | | | | | |
| | bronchitis | 2009-04-17 | | ICD9:477.8 (Allergic rhinitis, other allergen) | Chronic/Recurrent | | | 1 |
| Medications | | | | | | | | |
| | Claritin D | 2009-04-17 | | | Unknown or N/A | | | 0 |

Buttons: Add Issue Add Encounter To History Back

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups: [v]
 Find: [r]
 by: Name ID
 SSH DOB
 Logout

Immunizations

Click 'Summary' on the left (under 'Patient/Client – Management') to return to the Patient Summary page. Now click 'Immunizations (more)' to add an immunization for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567
 Marital Status: Married
 User Defined: Upcoming Appointments
 New Appointment

Contact Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Provider: Betty Black

Choices Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife
 Occupation: Engineer Employer Name: NW Company

Employer

Medical Problems (More) bronchitis
Allergies (More) penicillin
Medications (More) Claritin D
Immunizations (More)
Prescriptions Claritin D 1 in tablet q.d.

Notes (More) Balance Due \$136.57

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups
 Find:
 by: Name ID
 SSH DOB
 Logout

Done

This page contains a form for entering information on the any immunizations the patient has received.

Select the type of immunization from the drop-down list provided, and enter any data you may have, including the date of the shot, and the name of the provider who administered it.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
DOB: 1985-08-06 Sex: Male Upcoming Appointments
S.S.: 111-22-3333 License/ID: 1234567 [New Appointment](#)

Contact Marital Status: Married
User Defined:
Address: 321 SW Capitol Hwy City: Portland
State: Postal Code: 97219
Country: USA Emergency Contact: Wife

Immunizations

Immunization: DT 1
Date Administered: 2009-04-17
Immunization Manufacturer: AAA Drugs
Immunization Lot Number: 765
Name and Title of Immunization Administrator: Black, Betty or choose: Black, Betty
Date Immunization Information Statements Given: 2009-04-17
Date of VIS Statement (?): 2009-04-17

Notes

Print Shot Record Save Immunization Clear

Vaccine v Date Manufacturer Lot Number Administered By Education Date Note

Done

Click 'Save Immunization'. The newly added immunization now appears in the list at the bottom of the screen.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Betty Black (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male Upcoming Appointments
 S.S.: 111-22-3333 License/ID: 1234567 New Appointment

Contact Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife

Immunizations

Immunization: DT 1
 Date Administered: 2009-04-21
 Immunization Manufacturer:
 Immunization Lot Number:
 Name and Title of Immunization Administrator: Black, Betty or choose Black, Betty
 Date Immunization Information Statements Given: 2009-04-21
 Date of VIS Statement (?): 2009-04-21

Notes

Print Shot Record Save Immunization Clear

| Vaccine | Date | Manufacturer | Lot Number | Administered By | Education Date | Note |
|---------|------------|--------------|------------|-----------------|----------------|--------|
| DT 1 | 2009-04-17 | AAA Drugs | 765 | Black, Betty | 2009-04-17 | Delete |

Done

Return to the Summary page via the navigation menu on the left. Notice that the lower left portion of the patient summary now shows a brief list of all active issues, immunizations and prescriptions.

- Top Bot
- Calendar
- Password
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Rx
- Issues
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Demographics (More)

| | | | |
|-----------------|---|-----------------------------------|---------------------------------------|
| Who | Name: Mr. Rod Roark | External ID: 1 | Balance Due: \$136.57 |
| | DOB: 1985-08-06 | Sex: Male | Upcoming Appointments |
| | S.S.: 111-22-3333 | License/ID: 1234567 | New Appointment |
| | Marital Status: Married | | |
| | User Defined: | | |
| Contact | Address: 321 SW Capitol Hwy | City: Portland | |
| | State: | Postal Code: 97219 | |
| | Country: USA | Emergency Contact: Wife | |
| | Emergency Phone: 971-222-3333 | Home Phone: 503-456-7890 | |
| | Work Phone: 503-112-3334 | Mobile Phone: 971-564-7896 | |
| | Contact Email: mr.rod@gmail.com | | |
| Choices | Provider: Betty Black | | |
| | Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland | | |
| | HIPAA Notice Received: YES | Allow Voice Message: YES | |
| | Allow Mail Message: NO | Allow SMS: NO | |
| | Allow Email: YES | Leave Message With: wife | |
| Employer | Occupation: Engineer | Employer Name: NW Company | |
| | Employer Address: 44566 Industry Way | City: Portland | |
| | State: OR | Postal Code: 97002 | |

Active Patient:
Rod Roark (1)

Active Encounter:
None

Popups

Find:

by: **Name ID**
SSH DOB

[Logout](#)

Medical Problems (More)
- bronchitis

Allergies (More)
- penicillin

Medications (More)
- Claritin D

Immunizations (More)
- 2009-04-21 - DT 1

Prescriptions
Claritin D 1 in tablet q.d.

Notes (More)
Balance Due \$136.57

Patient Notes & Transactions

Patient notes store patient information that is unrelated to the patient's medical condition. Such information may include outstanding balances, changing insurance information or patient requests for actions by the clinic.

Transactions are somewhat similar, but record events that have already occurred. These may be referrals, requests from either the patient or the doctor, or legal transactions.

Patient Notes

The screenshot displays the OpenEMR interface in a Mozilla Firefox browser window. The address bar shows the URL: `http://localhost/openemr/interface/main/main_screen.php?auth=login`. The top status bar indicates the user is logged in as **Cindy Cyan (Default)**, the active patient is **None**, and the date is **April 21, 2009**. The interface includes a navigation menu on the left with options like **Calendar**, **Reports**, **Auth/notes**, and **Charges**. The main area shows a calendar view for **2009-04-21** in **Day View**. The calendar is organized into columns for **Administrator**, **B Black**, and **G Green**. A search function is located in the bottom left corner, with a search box containing `roark` and options to search by **Name**, **ID**, **SSN**, or **DOB**. The **Logout** button is also visible.

To begin, log in to OpenEMR, and use the search function in the lower left-hand corner to locate the patient for which you would like to add a note.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: None April 21, 2009

Top Bot

- Calendar
- Password
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Superbill
- Authnotes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: None
Active Encounter: None
Popups

Find: roark
by: Name ID SS DOB

[Logout](#)

[\[Help\]](#) Showing 1 of 1 records found.

| Name | Phone | SS | DOB | ID | PID | [Number Of Encounters] | [Days Since Last Encounter] | [Date of Last Encounter] | [90 Days From Last Encounter] |
|------------|--------------|-------------|------------|----|-----|------------------------|-----------------------------|--------------------------|-------------------------------|
| Roark, Rod | 503-456-7890 | 111-22-3333 | 08/06/1985 | 1 | 1 | 2 | 4 | 04/17/09 | Thursday, 07/16/09 |

Patient Notes [\(See All\)](#)

Done

Click on the desired patient to bring up the 'Summary' page.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567
 Marital Status: Married
 User Defined: Upcoming Appointments
 New Appointment

Contact Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com

Choices Provider: Betty Black
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife

Employer Occupation: Engineer Employer Name: NW Company

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find:
 by: Name ID
 SSH DOB

Logout

Done

Notes (More)
 Balance Due \$136.57

(Issues not authorized)

If the user is not Authorized they will be unable to see the patient's medical details such as issues, immunizations and prescriptions.

Click 'Notes (more)' to add a note for this patient.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Provider: Betty Black
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife
 Occupation: Engineer Employer Name: NW Company

Contact

Choices

Employer

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find: roark
 by: Name ID
 SSI DOB
 Logout

Patient Notes (Back)

(Issues not authorized)

Add New Note

Type: Unassigned To: Cyan, Cindy

New employer & insurance e Unassigned -1-2009.
 Chart Note
 Insurance
 New Document
 Pharmacy
 Prior Auth
 Referral
 Test Scheduling
 Bill/Collect
 Other

The 'Patient Notes' page will present you with a text box for entering the note, as well as drop-down lists for selecting the type of note, and the person to whom the note is addressed.

Type your note in the text box and click 'Add New Note'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male Upcoming Appointments
 S.S.: 111-22-3333 License/ID: 1234567 New Appointment

Contact
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Provider: Betty Black
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES

Choices

(Issues not authorized)

Patient Notes (Back)

Add New Note
 Type: Unassigned To: Cyan, Cindy

[Add New Note]

View: [All] [Only Active] [Only Inactive]

Change Activity

Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Change Activity

Done

The new note now appears in the list of notes on the same screen. The checkbox is used to control whether the note is "active". Above are options to view only the active or inactive notes.

Click 'Patient Notes (back)' to return to the patient summary.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567
 Upcoming Appointments
[New Appointment](#)

Marital Status: Married
User Defined:

Contact
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com

Choices
 Provider: Betty Black
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife

Employer
 Occupation: Engineer Employer Name: NW Company

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find: roark
 by: Name ID
 SSH DOB
 Logout

Done

Notes (More)
 Balance Due \$136.57
 Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

The new note is now listed on the Summary page.

Transactions

Click 'Transact' in the navigation menu to go to the Transactions page. (located under 'Patient/Client – Visits' in Tree View)

The Transactions page contains two basic form types. A simple form for internal transactions such as patient requests or billing transactions, and a Referral form.

Referrals

The screenshot shows the OpenEMR interface in a Mozilla Firefox browser window. The browser address bar shows the URL: `http://localhost/openemr/interface/main/main_screen.php?auth=login`. The page header indicates the user is logged in as **Cindy Cyan** (Default) and the active patient is **Rod Roark (1)** with a DOB of **1985-08-06** and age of **24**. The date is **April 21, 2009**.

The main content area is titled **Demographics (More)** and is divided into sections:

- Who:** Name: Mr. Rod Roark, External ID: 1, Sex: Male, DOB: 1985-08-06, S.S.: 111-22-3333, License/ID: 1234567, Balance Due: \$136.57, Upcoming Appointments: New Appointment.
- Contact:** Marital Status: Married, User Defined: Address: 321 SW Capitol Hwy, City: Portland, State: , Postal Code: 97219, Country: USA, Emergency Contact: Wife, Emergency Phone: 971-222-3333, Home Phone: 503-456-7890, Work Phone: 503-112-3334, Mobile Phone: 971-564-7896, Contact Email: mr.rod@gmail.com, Provider: Betty Black.
- Choices:** Transaction Type: Referral (dropdown menu is open showing options: Referral, Patient Request, Physician Request, Legal, Billing).

The **Referral** section is checked and contains the following fields:

- Referral Date:** (empty)
- Refer To:** Unassigned (dropdown)
- Refer By:** Unassigned (dropdown)
- Reason:** (text area)
- External Referral:** Unassigned (dropdown)
- Referrer Diagnosis:** (text area)
- Risk Level:** Medium (dropdown)
- Include Vitals:** Unassigned (dropdown)
- Requested Service:** (text area)

There is also an unchecked **Counter-Referral** checkbox and a **[Save Transaction]** button.

Select 'Referral' from the drop-down list to begin a new Referral transaction.

OpenEMR - Mozilla Firefox
 http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male
 S.S.: 111-22-3333 License/ID: 1234567

Contact
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Choices Provider: Betty Black

Transaction Type: Referral

Referral

Referral Date: 2009-04-21 Refer By: Betty Black
 Refer To: Orange, Ophelia Reason: See Dr. Orange for lesion on scalp.

External Referral: Yes Referrer Diagnosis:
 Risk Level: Low Include Vitals: No
 Requested Service:

Counter-Referral

[Save Transaction]

Another drop-down contains a list of physicians and clinics from the Address Book to which you can refer your patient. Select the referring physician, risk level, etc., and enter a reason for the referral.

Click 'Save Transaction'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who
 Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male Upcoming Appointments
 S.S.: 111-22-3333 License/ID: 1234567 New Appointment

Contact
 Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com
 Choices Provider: Betty Black

Patient Transactions (Add Transaction) (Print Blank Referral Form)
 Tue April 21st (cyan) Referral See Dr. Orange for lesion on scalp.

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find: roark
 by: Name ID
 SSI DOB

Logout

Done

The referral is now in the Patient Transactions list.

Click 'Referral' next to the transaction to generate a printable version of the Referral form.

Referral Form - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/patient_file/transaction/print_referral.php?transid=1

OpenEMR Referral Form

Your Clinic Name Here

| | |
|-------------|------------|
| Clinic ID | |
| Client ID | 1 |
| Control No. | 1 |
| Date | 2009-04-21 |

REFERRAL FORM

Name Mr. Rod Roark Age 23 Gender Male

Address 321 SW Capitol Hwy, Portland Postal 97219 Phone 503-456-7890

Reference Reason See Dr. Orange for lesion on scalp.

Diagnosis _____

Reference classification (risk level) Low

Doctor's name and signature Betty Black

Referred to Orange, Ophelia / Universal Health Center

Your Clinic Name Here

| | |
|-------------|------------|
| Clinic ID | |
| Client ID | 1 |
| Control No. | 1 |
| Date | 2009-04-21 |

Name Mrs. Marie M Maroon Age 23 Gender Male

Health centre/clinic Universal Health Center

Address 4456 SE Washington St., Portland OR Postal 97215 Phone _____

Reference Reason See Dr. Orange for lesion on scalp.

Client medical history summary:

Blood pressure / _____ Height _____ Weight _____

Referrer name and signature Betty Black

Specialist name and signature Orange, Ophelia

Done

Depending on your system's configuration, you may be asked to save the file, or it may be printed automatically.

When you are finished return to the Transaction list and click 'Add Transaction'.

Basic Transactions

OpenEMR - Mozilla Firefox
http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More) (Delete)

Who
Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
DOB: 1985-08-06 Sex: Male Upcoming Appointments
S.S.: 111-22-3333 License/ID: 1234567 New Appointment

Contact
Marital Status: Married
User Defined:
Address: 321 SW Capitol Hwy City: Portland
State: Postal Code: 97219
Country: USA Emergency Contact: Wife
Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
Contact Email: mr.rod@gmail.com
Provider: Betty Black
Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland

Choices
HIPAA Notice Received: YES Allow Voice Message: YES

Transaction Type: Physician Request

Details:
request pre-authorization for air filtration system in patient home.

[Save Transaction]

Active Patient: Rod Roark (1)
Active Encounter: None
Popups: [Dropdown]
Find: [roark]
by: Name ID
SSH DOB
Logout

Other transaction types use the simple transaction form. Select the desired type from the list and enter the transaction details in the text box provided. Click 'Save Transaction' when finished.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Cindy Cyan (Default) Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 April 21, 2009

Demographics (More)

Who Name: Mr. Rod Roark External ID: 1 Balance Due: \$136.57
 DOB: 1985-08-06 Sex: Male Upcoming Appointments
 S.S.: 111-22-3333 License/ID: 1234567 New Appointment

Contact Marital Status: Married
 User Defined:
 Address: 321 SW Capitol Hwy City: Portland
 State: Postal Code: 97219
 Country: USA Emergency Contact: Wife
 Emergency Phone: 971-222-3333 Home Phone: 503-456-7890
 Work Phone: 503-112-3334 Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com

Choices Provider: Betty Black
 Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland
 HIPAA Notice Received: YES Allow Voice Message: YES
 Allow Mail Message: NO Allow SMS: NO
 Allow Email: YES Leave Message With: wife

Employer Occupation: Engineer Employer Name: NW Company

Patient Transactions (Add Transaction) (Print Blank Referral Form)

Tue April 21st (cyan) Physician Request request pre-authorization for air filtration system in patient home.

Tue April 21st (cyan) Referral See Dr. Green for lesion on scalp.

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups

Find: roark
 by: Name ID
 SSH DOB

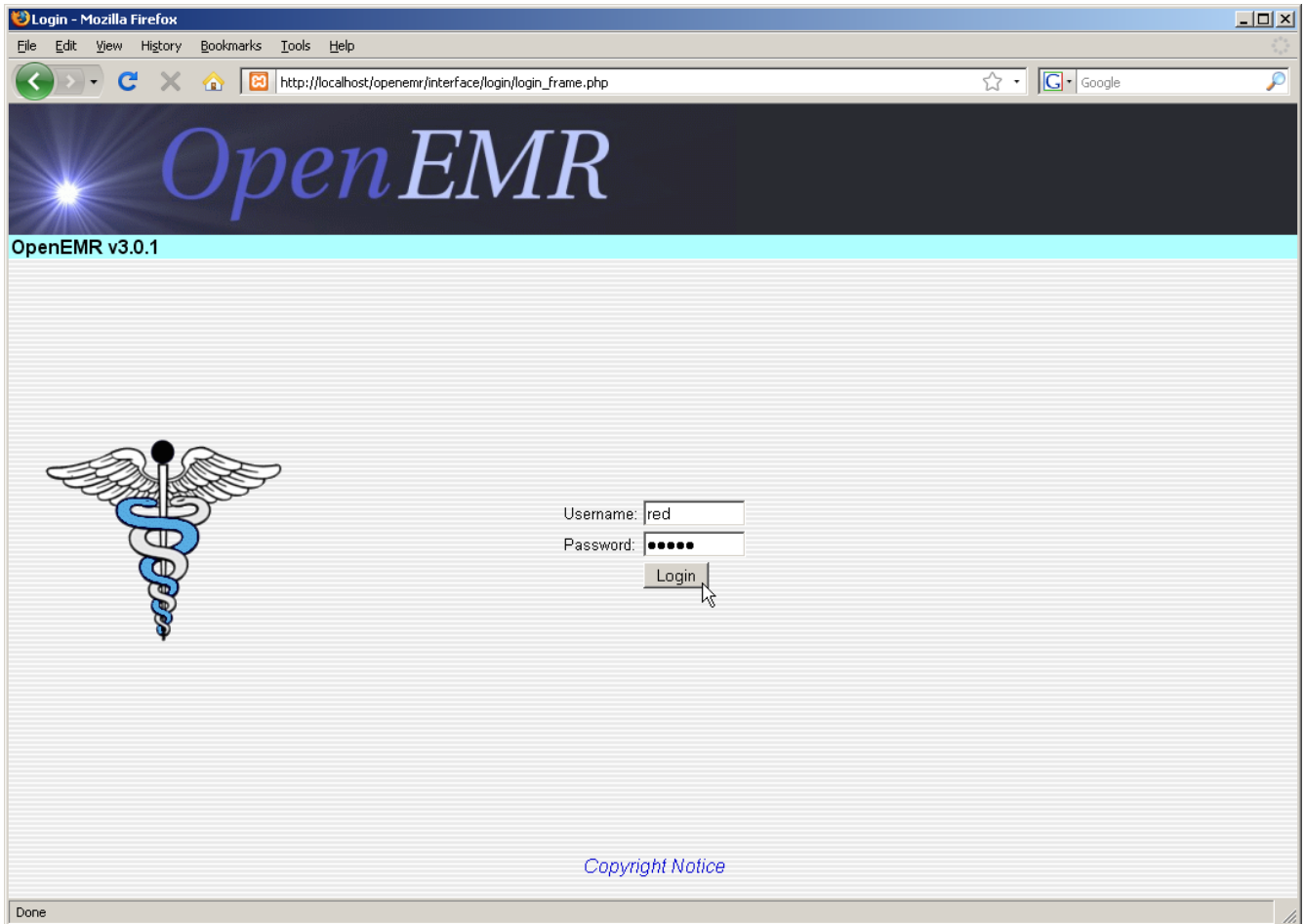
Logout

Done

The new transaction has now been added to the list along with the referral. Click on the date of a transaction to edit its contents.

Basic Billing

Only the Administrator, authorized users, and those with Access Control designated as 'Accounting' in their user profile can access OpenEMR's Billing system.



To begin, log in with your designated username and password.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Do you want Firefox to remember this password? Remember Never for This Site Not Now

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot
 Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Bk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Immunize Documents
 PT Report PT Notes
 Transact Summary
 Encounter Charges

All Users Administrator Betty Black
 2009-04-21 Day View Go Today Add Search
 All Facilities << Tuesday, April 21, 2009 >>

| | Administrator | B Black | G Green |
|---------|---------------|---------|-------------|
| 8:00 | | 8:00 | 8:00 IN |
| | | 8:30 IN | 8:15 |
| | | 8:45 | 8:30 |
| | | 9:00 | 8:45 |
| | | 9:15 | 9:00 |
| | | 9:30 | 9:15 |
| 9:30 IN | | 9:45 | 9:30 |
| 9:45 | | 10:00 | 9:45 |
| 10:00 | | 10:15 | 10:00 |
| 10:15 | | 10:30 | 10:15 |
| 10:30 | | 10:45 | 10:30 |
| 10:45 | | 11:00 | 10:45 |
| 11:00 | | | 11:00 LUNCH |

Patient Notes (See All)

Active Patient: None
 Active Encounter: None
 Popups
 Find:
 by: Name ID SSH DOB
 Logout

Done

Select 'Billing' from the navigation menu on the left (under 'Fees' in Tree View). This brings you to the main Billing screen. This will present you with options to generate a variety of printable and electronic claims and reports.

Billing Reports

The screenshot shows the OpenEMR Billing Report page in a Mozilla Firefox browser window. The browser title is "OpenEMR - Mozilla Firefox" and the address bar shows the URL "http://localhost/openemr/interface/main/main_screen.php?auth=login". The page header indicates the user is logged in as "Randy Red (Default)", the active patient is "None", and the date is "April 21, 2009".

The main content area is titled "Billing Report" and contains the following elements:

- Navigation links: [\[View Printable Report\]](#), [\[Reports\]](#), [\[EOBs\]](#), [\[View Log\]](#), and [\[Select All\]](#).
- Filters: "From: 2009-04-21" and "To:" (empty) with date selection tools. Checkboxes for "Show Unbilled Only" (checked) and "Show Authorized Only" (unchecked).
- Buttons: "Generate X12", "Generate HCFA", "Mark as Cleared", and "Re-Open".
- HCFA Margins: "Left: 24" and "Top: 27".

The left sidebar contains a menu of navigation options, with "Billing" selected. Other options include Calendar, Password, Admin, Reports, Ofc Notes, Fax/Scan, Addr Bk, Chart Trk, Superbill, Auth/notes, New Pt, Patient, History, Encounters, New Enctr, Immunize, Documents, Pt Report, PT Notes, Transact, Summary, Encounter, and Charges.

Below the sidebar, the "Active Patient: None" and "Active Encounter: None" status is displayed, along with a "Popups" dropdown menu. A search section includes a "Find:" input field and a "by:" dropdown menu with options for "Name ID" and "SSH DOB". A "Logout" link is also present.

The bottom of the page shows a "Patient Notes (See All)" section, which is currently empty. The status bar at the bottom of the browser window displays "Done".

The Billing Report page will automatically display any billable encounters that were generated today. To view billables from a different time period enter the 'From' and 'To' dates using the date selection tool, and click 'Change View' in the top right corner of the screen.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot
 Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Bk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Immunize Documents
 PT Report PT Notes
 Transact Summary
 Encounter Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: [Name](#) [ID](#)
[SSH](#) [DOB](#)

[Logout](#)

Billing Report

From: 2009-04-13 To: Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]

[View Printable Report] [Reports] [EOBs] [Select All]

Generate X12 Generate HCFA

| April, 2009 | | | | | | |
|-------------|-----|-----|-----|-----|-----|-----|
| Today | | | | | | |
| wk | Sun | Mon | Tue | Wed | Thu | Fri |
| 13 | | | | 1 | 2 | 3 |
| 14 | 5 | 6 | 7 | 8 | 9 | 10 |
| 15 | 12 | 13 | 14 | 15 | 16 | 17 |
| 16 | 19 | 20 | 21 | 22 | 23 | 24 |
| 17 | 26 | 27 | 28 | 29 | 30 | |

HCFA Margins: Left: 24 Top: 27

Patient Notes [\(See All\)](#)

Done

The list should now display all billables from the selected date range.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: [Name](#) [ID](#)
[SSH](#) [DOB](#)
[Logout](#)

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]

[View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

| | | | | | |
|--|---------------------|----------|-------------|------------|--------------------------|
| Rod Roark (1-23) [To Encounter] [To Demographics] | CPT4: 99203 (477.8) | \$136.57 | Betty Black | 2009-04-17 | <input type="checkbox"/> |
| Bill: primary: Pacific Health Zirmed | ICD9: 477.8 | | Betty Black | 2009-04-17 | |

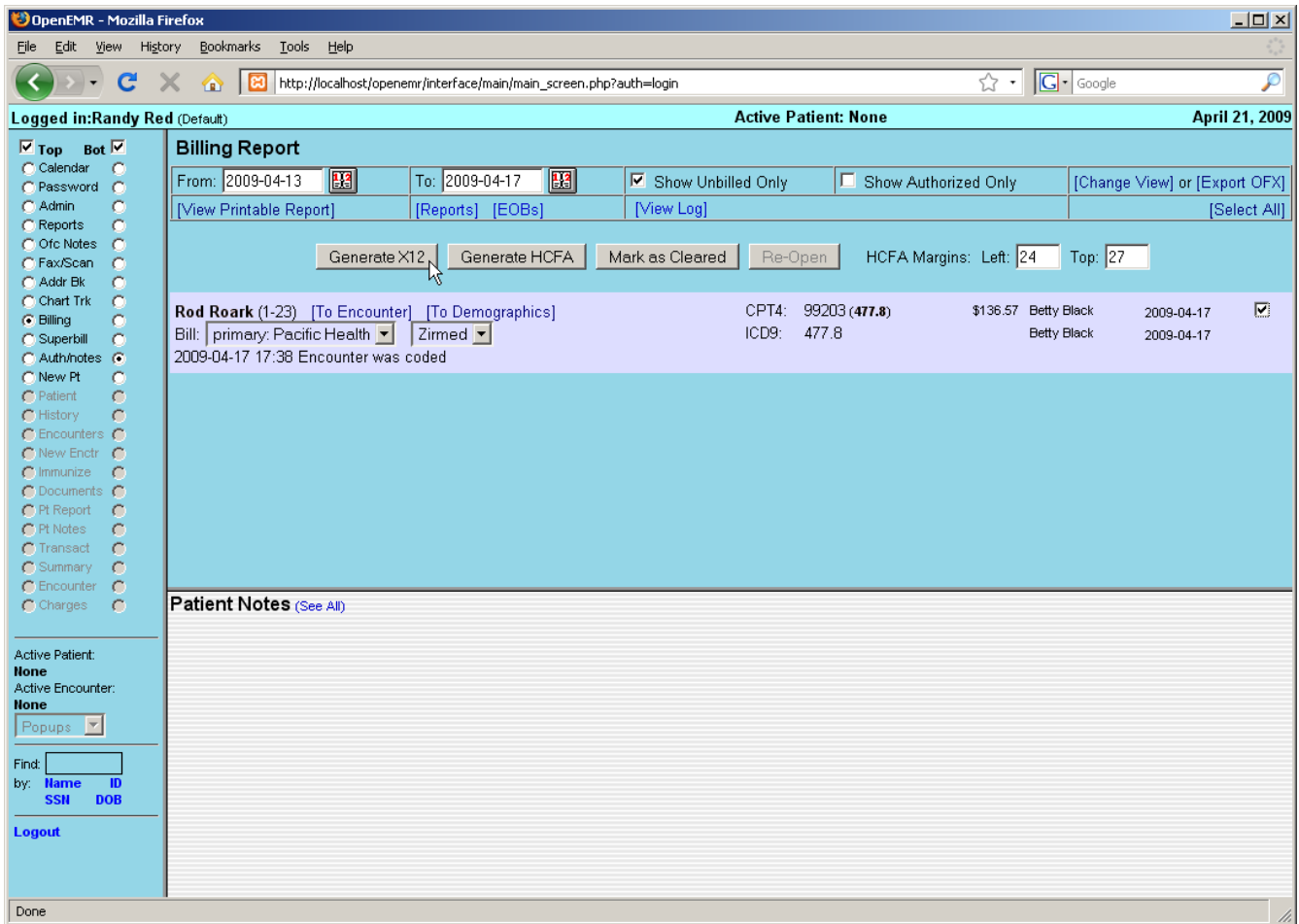
2009-04-17 17:38 Encounter was coded

Patient Notes [\(See All\)](#)

Generating Claims

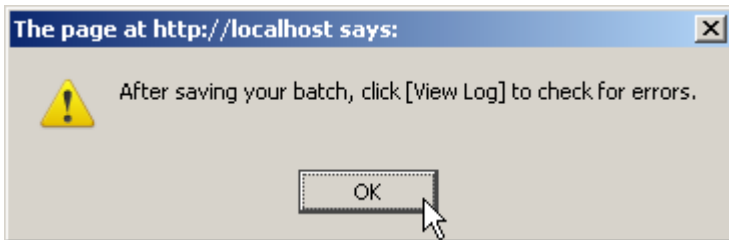
Clicking the checkbox to the right of the desired encounter will enable a set of buttons for generating claims. Your system should be configured with the appropriate set of forms for the insurance companies and clearinghouses used by your clinic.

Click 'Generate X12' to create a claim file that is suitable for sending to the clearinghouse.

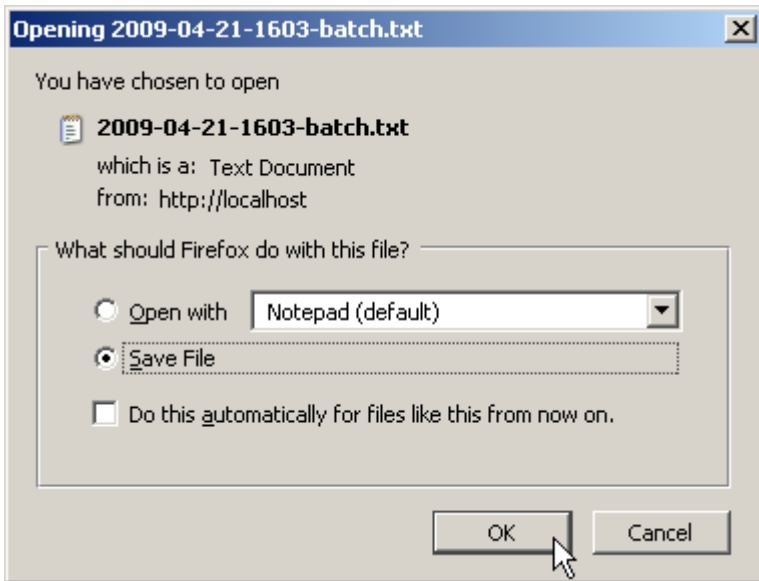


OpenEMR will present you with a confirmation popup, reminding you to check the log file after you have finished generating your claims.

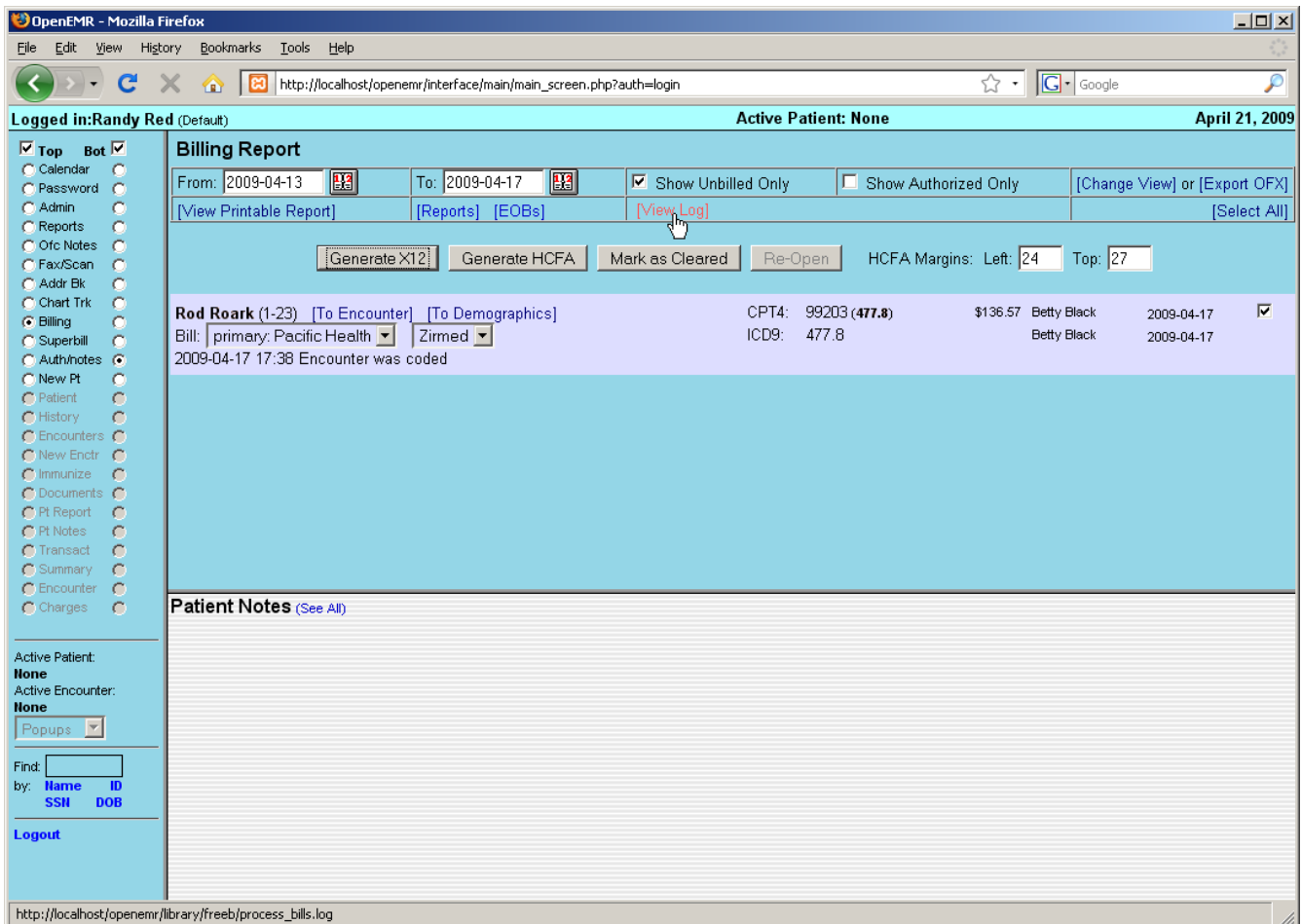
Click 'OK' to proceed.



The standard Save File dialog should appear, allowing you to save the generated batch file to your computer.



Once the file has been saved, click 'View Log' to check whether the claims were generated successfully.



If there were any errors in the claim generation process, they will be displayed here. Otherwise you will see a note indicating that the file was generated successfully.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot
 Calendar Password
 Admin Reports
 Ofc Notes Fax/Scan
 Addr Bk Chart Trk
 Billing Superbill
 Auth/notes New Pt
 Patient History
 Encounters New Enctr
 Immunize Documents
 Pt Report Pt Notes
 Transact Summary
 Encounter Charges

Active Patient: None
Active Encounter: None
Popups

Find:
by: Name ID
SSH DOB

Logout

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [Change View] or [Export OFX]
 [View Printable Report] [Reports] [EOBs] [View Log] [Select All]

Generate X12 Generate HCFA Mark as Cleared Re-Open HCFA Margins: Left: 24 Top: 27

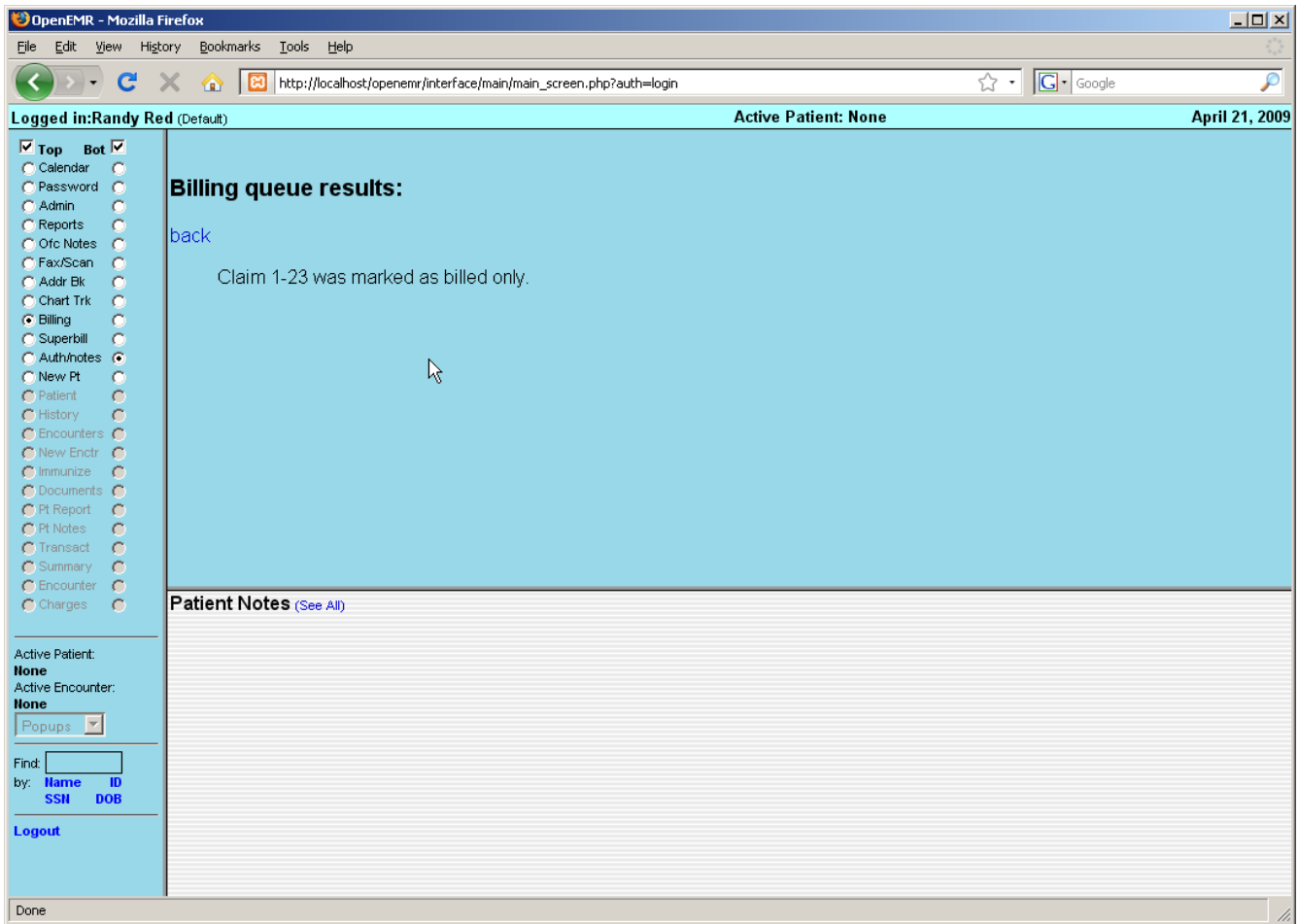
Rod Roark (1-23) [To Encounter] [To Demographics] CPT4: 99203 (477.8) \$136.57 Betty Black 2009-04-17
 Bill: primary: Pacific Health Zirmed ICD9: 477.8 Betty Black 2009-04-17
 2009-04-17 17:38 Encounter was coded
 2009-04-21 16:03 Queued for primary standard billing to Pacific Health
 2009-04-21 16:03 Claim was generated to file 2009-04-21-1603-batch.txt

Patient Notes (See All)

Done

You will then be presented with a screen indicating that the claim has been “marked as billed only.”

Click 'Back' to return to the Billing Report page.



Generating HCFA Forms

In OpenEMR multiple forms may be generated for each claim.

For example, re-enter the desired date range, uncheck 'Show Unbilled Only' and click 'Change View' again to show the current status of the claim. You can see that the claim has been “Marked as cleared.”

Check the box to the right of the encounter and click 'Generate HCFA'.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot
 Calendar
 Password
 Admin
 Reports
 Ofc Notes
 Fax/Scan
 Addr Bk
 Chart Trk
 Billing
 Superbill
 Auth/notes
 New Pt
 Patient
 History
 Encounters
 New Enctr
 Immunize
 Documents
 PT Report
 PT Notes
 Transact
 Summary
 Encounter
 Charges

Active Patient: None
 Active Encounter: None
 Popups

Find:
 by: [Name](#) [ID](#)
[SSH](#) [DOB](#)
[Logout](#)

Billing Report

From: 2009-04-13 To: 2009-04-17
 Show Unbilled Only Show Authorized Only [\[Change View\]](#) or [\[Export OFX\]](#)
[\[View Printable Report\]](#) [\[Reports\]](#) [\[EOBs\]](#) [\[View Log\]](#) [\[Select All\]](#)

HCFA Margins: Left: Top:

| | | | | | |
|--|------------------------------|----------|-------------|------------|-------------------------------------|
| Rod Roark (1-23) [To Encounter] [To Demographics] | CPT4: 99203 (477.8) | \$136.57 | Betty Black | 2009-04-17 | <input checked="" type="checkbox"/> |
| Bill: primary: Pacific Health <input type="text"/> Zirmed <input type="text"/> | ICD9: 477.8 | | Betty Black | 2009-04-17 | |

2009-04-17 17:38 Encounter was coded
 2009-04-21 16:03 Queued for primary standard billing to Pacific Health
 2009-04-21 16:03 Claim was generated to file 2009-04-21-1603-batch.txt
 2009-04-21 16:06 Marked as cleared

Patient Notes [\(See All\)](#)

Done

OpenEMR will now generate a PDF of the HCFA claim, based on the standard HCFA form template. The new form can be viewed using a built-in PDF viewer, or printed automatically on a pre-printed HCFA 1500 form, depending on your system's configuration.

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Randy Red (Default) Active Patient: None April 21, 2009

Top Bot

- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Immunize
- Documents
- PT Report
- PT Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient: None

Active Encounter: None

Popups

Find:

by: Name ID
SSH DOB

Logout

Done

PACIFIC HEALTH
2001 E 123RD ST
PASADENA, CA 90059

X 1122334

ROARK, ROD 09 06 1995 X ROARK, ROD
321 SW CAPITOL HWY X 321 SW CAPITOL HWY
PORTLAND PORTLAND OR
97219 503 4567890 X 97219 503 4567890
1234
X 04 14 2009 X
X NW COMPANY
X FH 70
X

SIGNATURE ON FILE SIGNATURE ON FILE

04 17 2009 1G U11111
BLACK, BETTY
477 8
X

04 17 09 04 17 09 11 99203 1 136 57 1

112222222 X 1-23 X 136 57 0 00 136 57
503 1234567

YOUR CLINIC NAME HERE YOUR CLINIC NAME HERE
1234 SW MAIN ST 1234 SW MAIN ST
SIGNATURE ON FILE PORTLAND OR 97205 PORTLAND OR 97205

Returning to the Billing Report, you can see that the status of the billable encounter has been updated.

- Top Bot
- Calendar
- Password
- Admin
- Reports
- Ofc Notes
- Fax/Scan
- Addr Bk
- Chart Trk
- Billing
- Superbill
- Auth/notes
- New Pt
- Patient
- History
- Encounters
- New Enctr
- Immunize
- Documents
- Pt Report
- Pt Notes
- Transact
- Summary
- Encounter
- Charges

Active Patient:
None

Active Encounter:
None

Popups

Find:

by: [Name](#) [ID](#)
[SSH](#) [DOB](#)

[Logout](#)

Billing Report

From: 2009-04-13 To: 2009-04-17 Show Unbilled Only Show Authorized Only [\[Change View\]](#) or [\[Export OFX\]](#)

[\[View Printable Report\]](#) [\[Reports\]](#) [\[EOBs\]](#) [\[View Log\]](#) [\[Select All\]](#)

HCFA Margins: Left: Top:

Rod Roark (1-23) [\[To Encounter\]](#) [\[To Demographics\]](#) CPT4: 99203 (**477.8**) \$136.57 Betty Black 2009-04-17

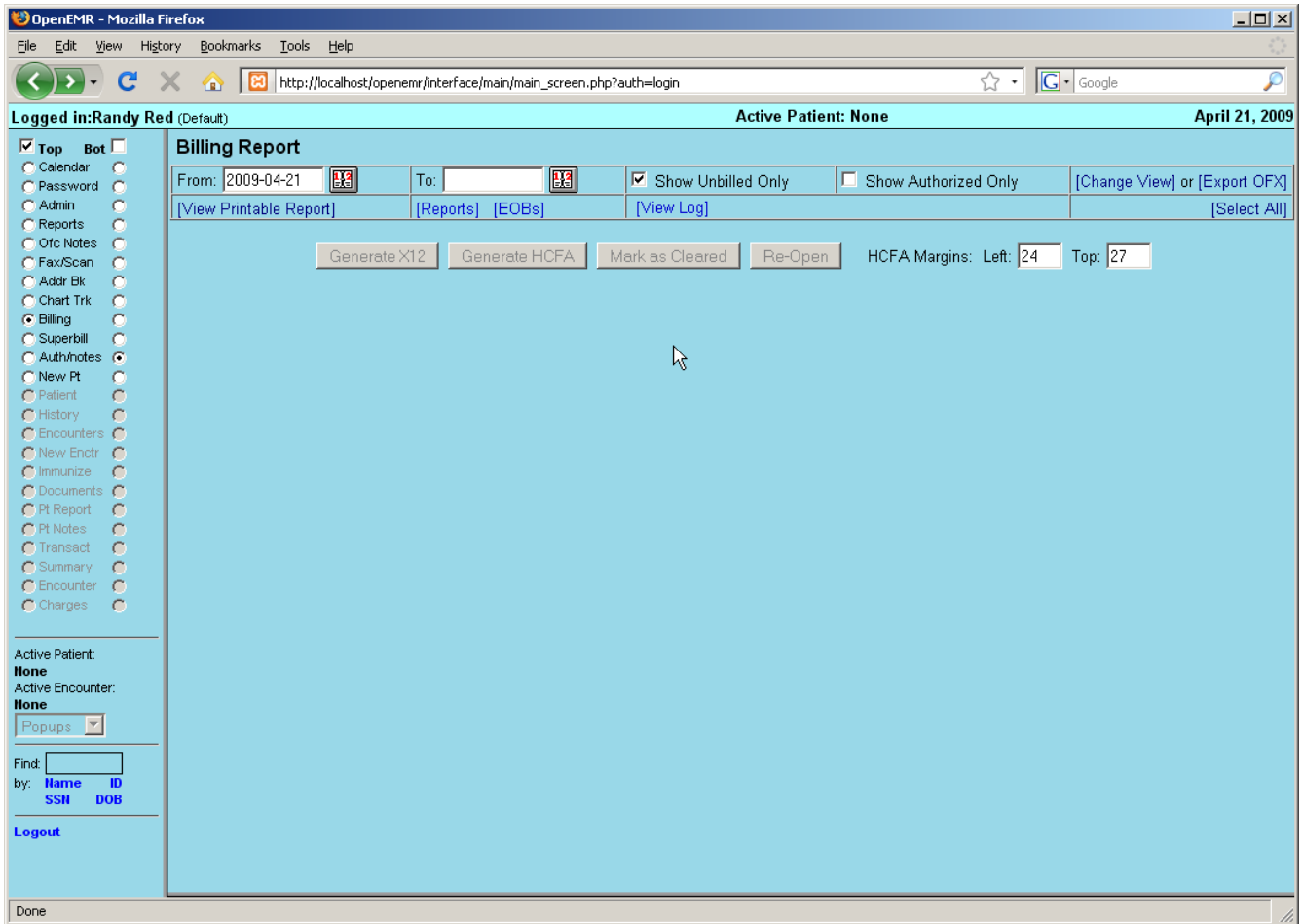
Bill: primary: Pacific Health Zirmed ICD9: 477.8 Betty Black 2009-04-17

2009-04-17 17:38 Encounter was coded
 2009-04-21 16:03 Queued for primary standard billing to Pacific Health
 2009-04-21 16:03 Claim was generated to file [2009-04-21-1603-batch.txt](#)
 2009-04-21 16:06 Marked as cleared
 2009-04-21 16:09 Queued for primary hcfa billing to Pacific Health
 2009-04-21 16:09 Claim was generated to file [2009-04-21-1609-batch.pdf](#)

Accounting & Receivables

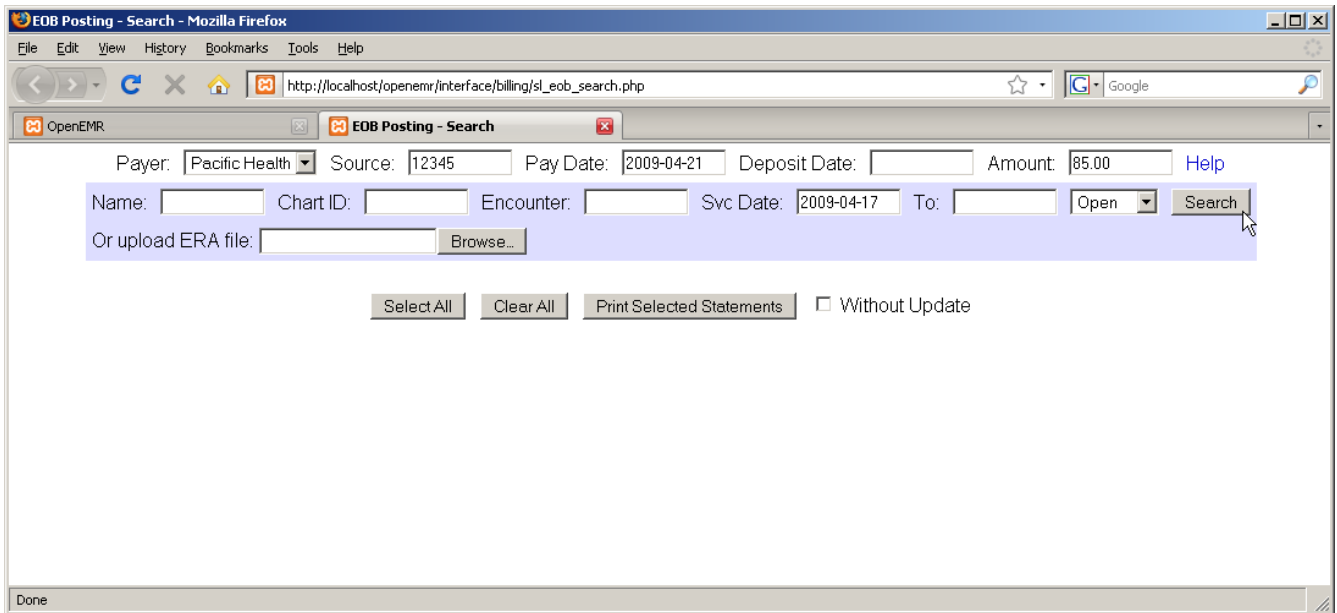
Users classified as Accounting or Administrator are also authorized to enter receivables for the clinic. Checks received from insurance companies can be entered here and distributed to cover the appropriate encounters. Patients can also be billed, and their payments recorded.

Explanation of Benefits

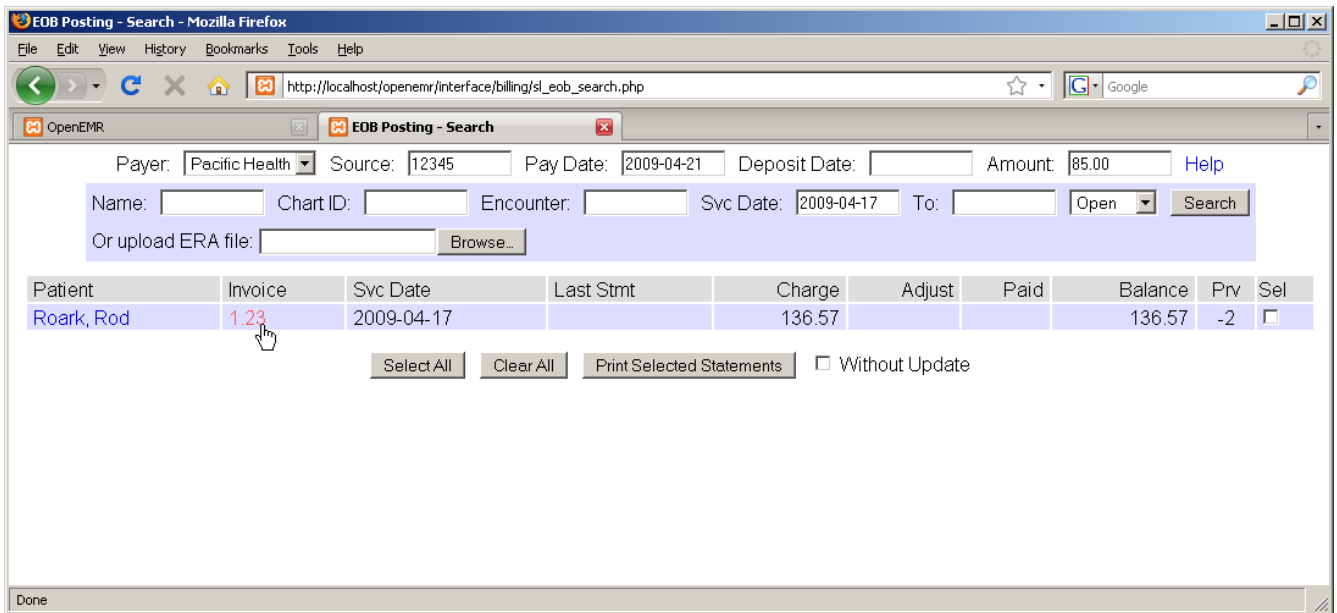


To begin, select 'Billing' from the navigation menu and click 'EOBs' to bring up the Explanation of Benefits Search window. This is where you can upload an ERA file (click 'Help' in the upper right-hand corner for more information) or begin inputting payments manually.

At the top you may enter a source (Eg. check number), pay date and check amount. The amount field will be automatically decremented as payments are entered into the associated invoices. When all invoices have been completed this value should be zero.



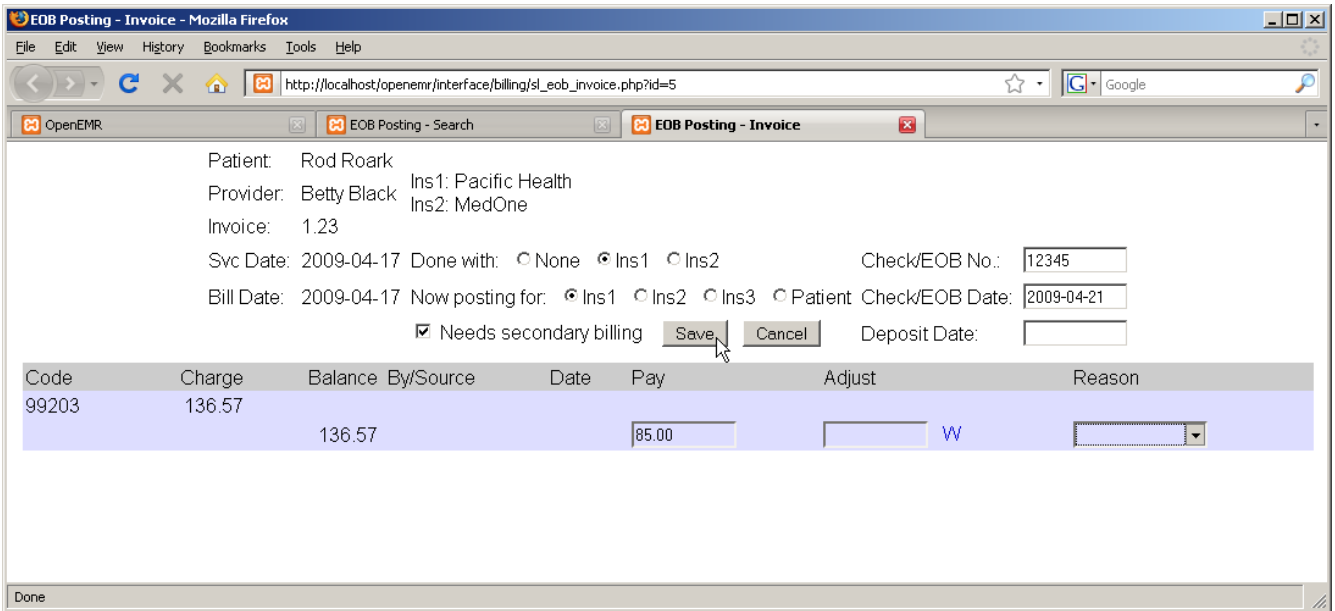
The search fields, with the blue background, are for locating a specific invoice (or invoices). Enter the appropriate parameters, such as the date of service, and click 'Search' to bring up a list of all invoices (claims) matching the requested parameters.



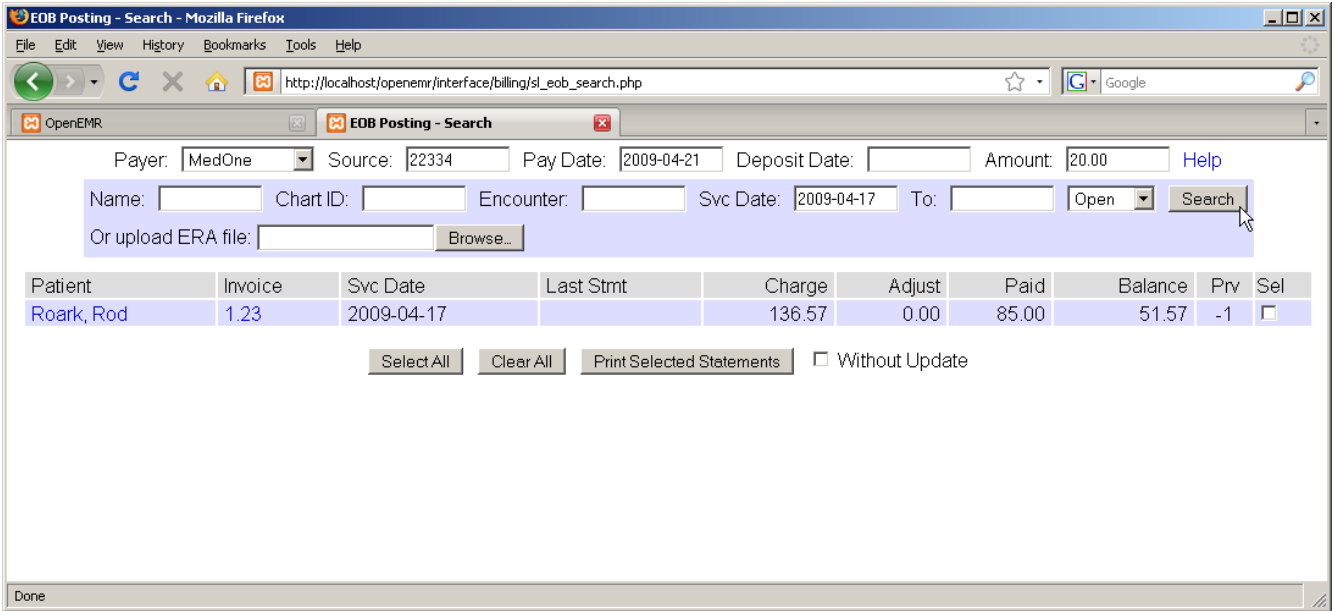
The list shows the patient and invoice number, as well as the current balance to be paid. The number with a '-' in the 'Prv' column indicates the number of insurance companies for which this invoice is awaiting payment.

Entering Payments

Clicking the invoice number you wish to work with opens the EOB Invoice window. Notice that the source and pay date from the previous window have been copied over; this saves time in the common case where a single check from the insurance company pays for multiple claims.



The EOB Invoice page contains a detailed list of payments made on this invoice so far. Enter the payment amount next to the remaining balance, and check 'Needs secondary billing'. This will allow the claim to be re-billed to the secondary insurance. Select 'Done with Ins1' above to indicate that the primary insurance EOB has been posted. When you are finished, click 'Save'.



Once payment has been billed and received from secondary insurance, it can be entered in the same way. Enter the source and pay date, etc. and locate the appropriate invoice(s) using the search function.

Payment amounts are now shown along with the remaining balance. The number in the 'Prv' column has also decreased. Select the invoice number to bring up the EOB Invoice window again.

EOB Posting - Invoice - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl_eob_invoice.php?id=5

OpenEMR EOB Posting - Search EOB Posting - Invoice

Patient: Rod Roark
 Provider: Betty Black Ins1: Pacific Health
 Invoice: 1.23 Ins2: MedOne

Svc Date: 2009-04-17 Done with: None Ins1 Ins2 Check/EOB No.: 22334
 Bill Date: 2009-04-17 Now posting for: Ins1 Ins2 Ins3 Patient Check/EOB Date: 2009-04-21
 Needs secondary billing Deposit Date:

| Code | Charge | Balance | By/Source | Date | Pay | Adjust | Reason |
|-------|--------|---------|------------|------------|-------|--------|--------|
| 99203 | 136.57 | | Ins1/12345 | 2009-04-21 | 85.00 | | |
| | | 51.57 | | | 20 | 16.57 | W |

Ins adjust
 Coll w/o
 Pt released
 Sm debt w/o
 To ded'ble
 To copay
 Bad check
 Bad debt
 Discount
 Hardship w/o
 Ins refund
 Pt refund
 Ins overpaid
 Pt overpaid
 Adm adjust
 Untimely filing
 Ins bundling
 After hrs calls

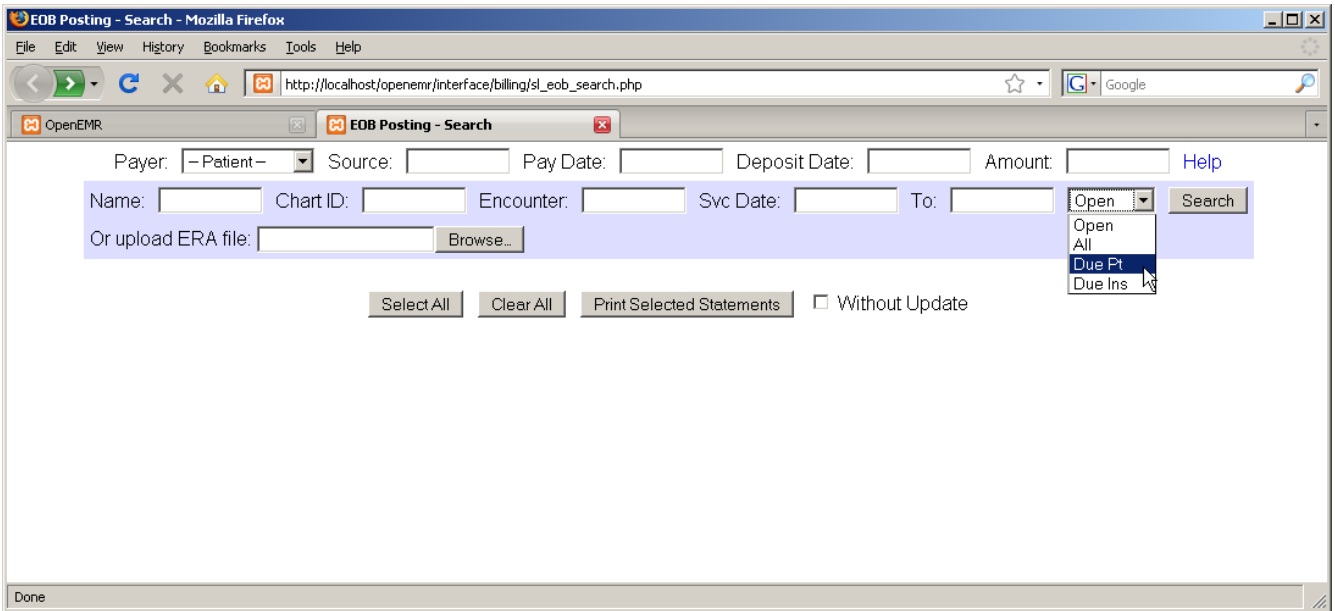
Done

Enter the payment amount and select 'Ins2' to indicate that the secondary insurance EOB has been posted.

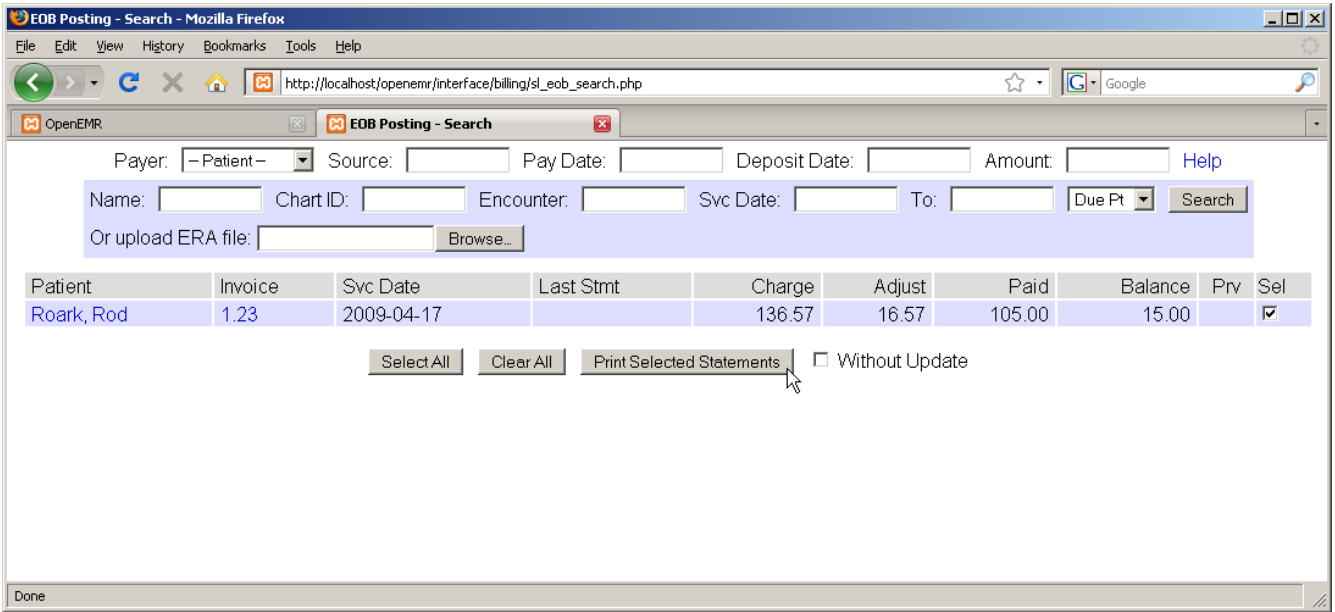
Invoice adjustments may also be made here. Enter the adjustment amount (or click 'W' to waive the entire remaining balance), and select a reason for the adjustment from the drop-down list provided. Click 'Save' when finished.

Patient Invoices and Payments

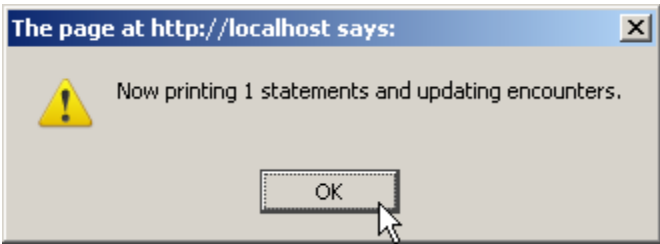
Once payments from the insurance companies have been received and entered, you can use OpenEMR's EOB page to generate invoices for billing patients the remaining amounts.



Select 'Due Pt' from the drop-down list and click 'Search' to display a list of all invoices that are awaiting payment from patients. Invoices still awaiting payments from insurance companies will not be shown.



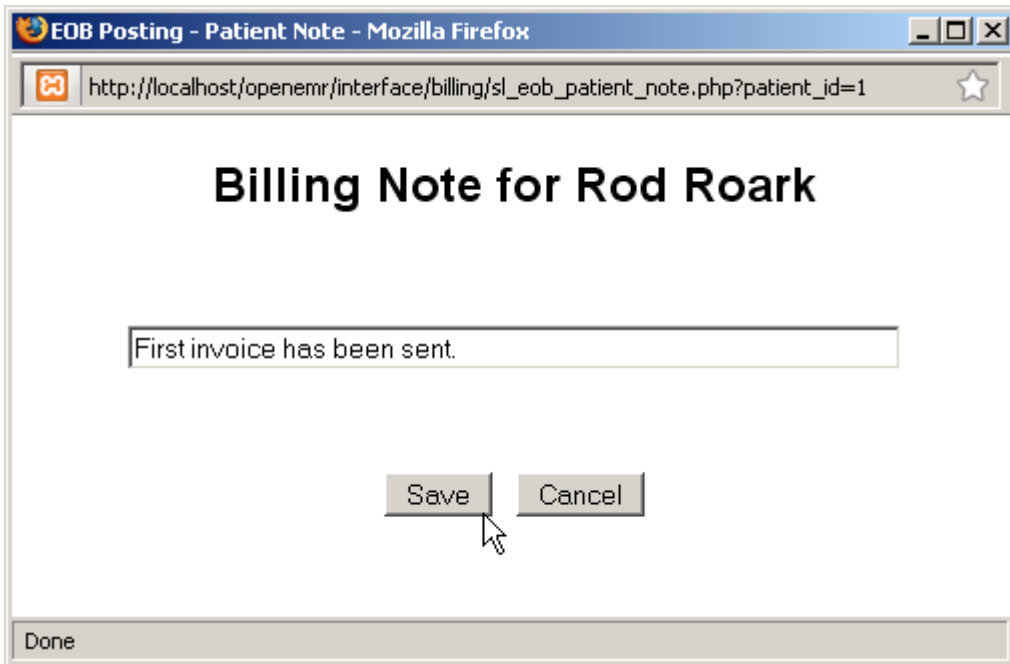
Check the box next to the desired invoice and click 'Print Selected Statements' to generate an invoice for that patient using a customizable template. Depending on your clinic's OpenEMR configuration, the invoice may be printed automatically.



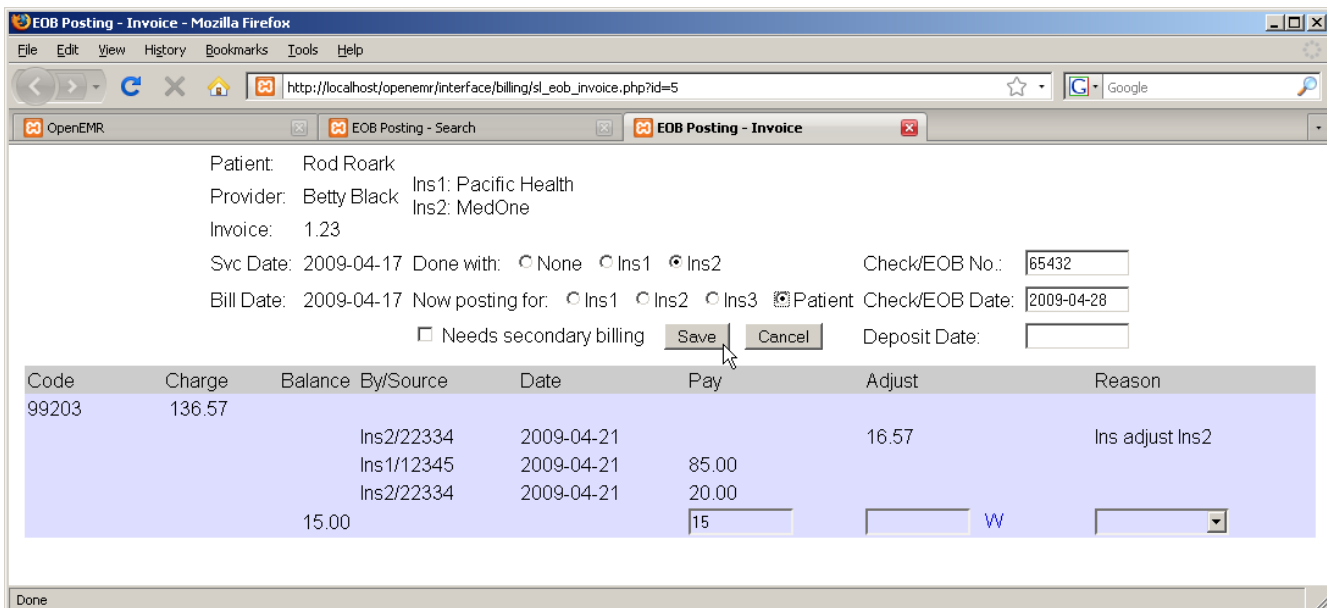
A '1' in the 'Prv' column now indicates that the patient has been billed once for this claim. This number will increment every time a new invoice is printed for this encounter. This is useful when printing so that second

and later notices may be worded differently from the initial statement.

You can also click on the patient's name in the invoice list to create a billing note for that patient. Enter your note into the text field and click 'Save'.

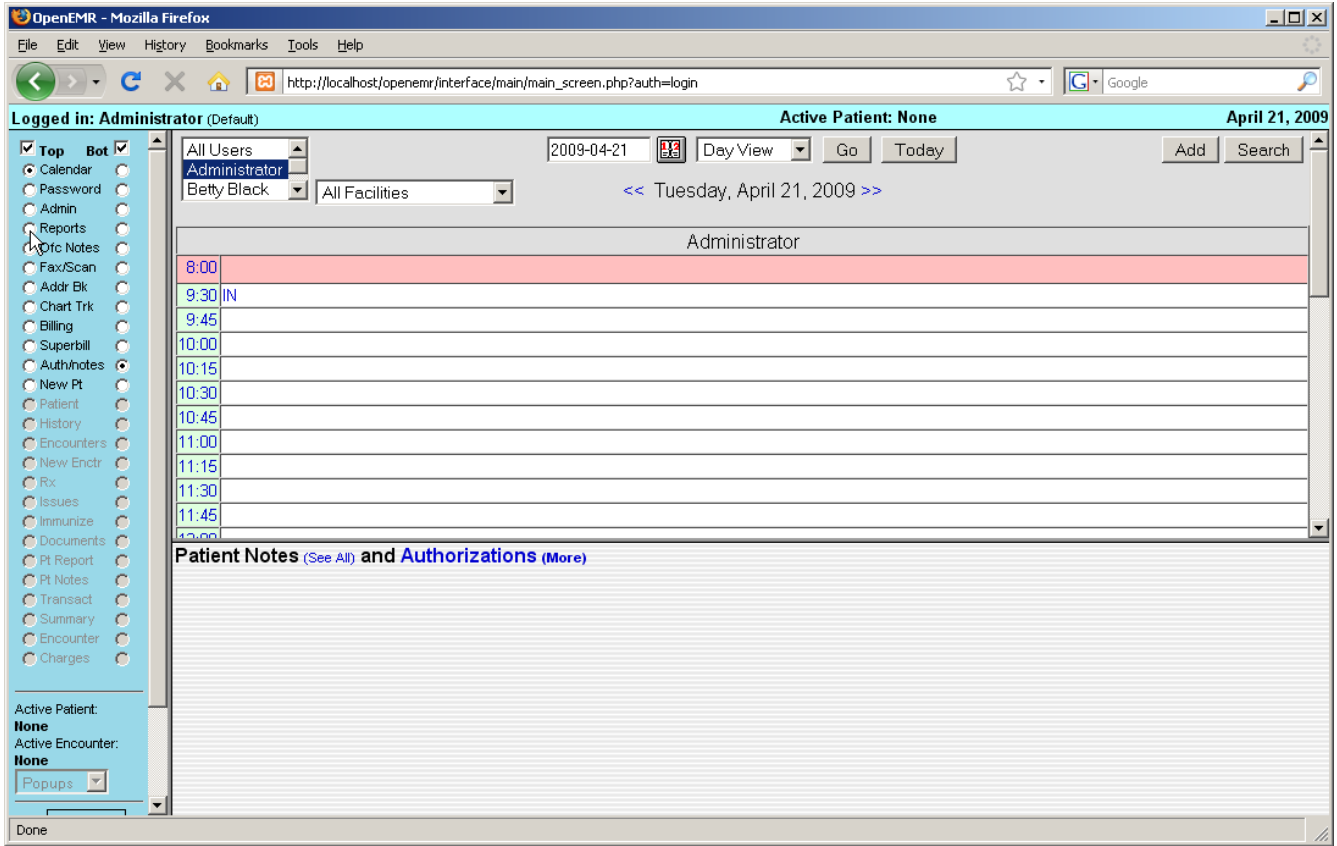


Once payment has been received, it can be entered into the invoice in the same manner as the insurance payments. In the 'Now posting for' list be sure to select 'Patient'. Enter the payment amount as before and click 'Save'.



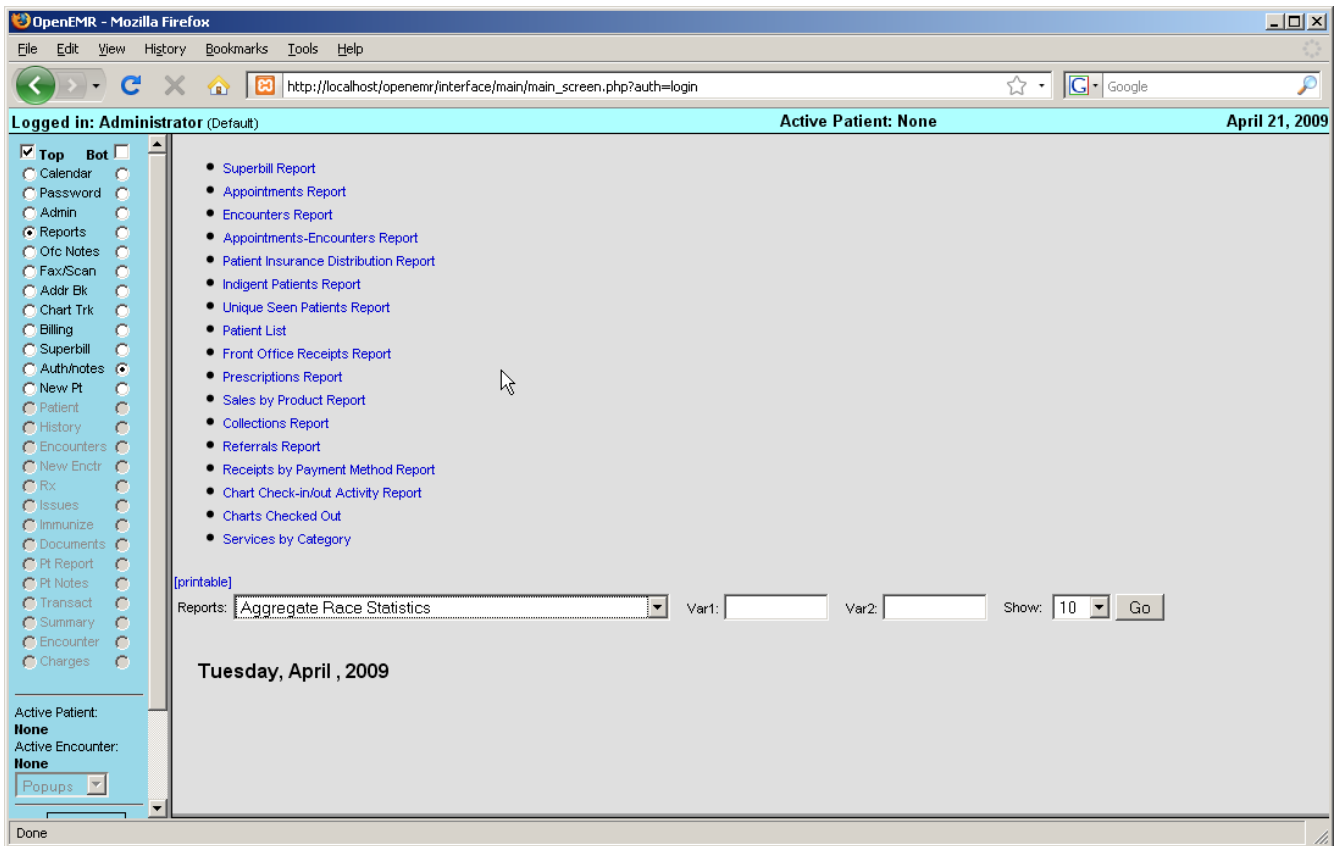
Reporting

Within OpenEMR there are a wide array of reports you can generate which may be useful for your practice. These include general reports such as appointment and encounter reports, billing reports, and patient specific reporting.



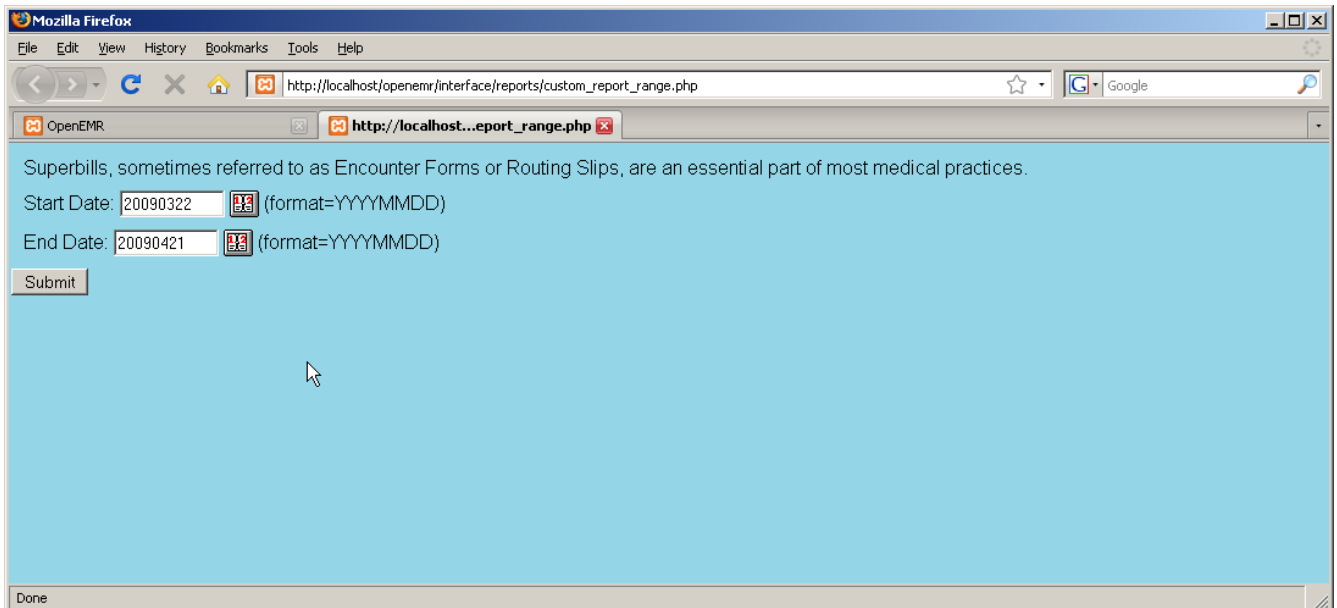
General Reports

Most general reporting tools can be found by selecting 'Reports' from the navigation menu at left. If you are using the Tree View scheme, the list of available reports is divided into a hierarchical list within the navigation menu.



Examples of some commonly used reports:

The Superbill Report presents you with a dialog for selecting a date range.



Clicking 'Submit' produces a report for each encounter in the date range, and shows patient demographics and insurance information

Mozilla Firefox
 http://localhost/openemr/interface/reports/custom_report_range.php

OpenEMR http://localhost...eport_range.php

Patient Data:

| | | | | | |
|--|---------------------------------------|--------------------------------|---------------------------|----------------------------------|-------------------------------------|
| Title: Mr. | First Name: Rod | Last Name: Roark | Sex: Male | SS: 111-22-3333 | Date of Birth: 1985-08-06 |
| Street: 321 SW Capitol Hwy | City: Portland | Zip: 97219 | Country: USA | Occupation: Engineer | Home Phone: 503-456-7890 |
| Business Phone: 503-112-3334 | Contact Phone: 971-222-3333 | Contact Person: Wife | Allows Mail: NO | Allows Voice msgs: YES | Notice Received: YES |

Leave Message With:
wife

Insurance Data:

Primary:

| | | | | | |
|--|---|--|---|--|--|
| Provider: Pacific Health | Plan Name: PH 7.0 | Policy Number: 1122334 | Group Number: 1234 | Subscriber First Name: Rod | Subscriber Last Name: Roark |
| Subscriber Relationship: self | Subscriber SS: 111-22-3333 | Subscriber Date of Birth: 2009-04-14 | Subscriber Phone: 503-456-7890 | Subscriber Address: 321 SW Capitol Hwy | Subscriber Zip: 97219 |
| Subscriber City: Portland | Subscriber State: OR | Subscriber Country: USA | Subscriber Employer: NW Company | Subscriber Employer Street: 44566 Industry Way | Subscriber Employer City: Portland |
| Subscriber Employer Zip: 97002 | Subscriber Employer State: OR | Subscriber Employer Country: USA | | | |

Secondary:

| | | | | | |
|---|--------------------------------------|--|--|--|--|
| Provider: MedOne | Plan Name: MedOne Gold | Policy Number: 543216 | Group Number: 1112 | Subscriber First Name: Rod | Subscriber Last Name: Roark |
| Subscriber Relationship: self | Subscriber SS: 111-22-3333 | Subscriber Date of Birth: 1985-08-06 | Subscriber Phone: 503-456-7890 | Subscriber Address: 321 SW Capitol Hwy | Subscriber Zip: 97219 |
| Subscriber City: Portland | Subscriber Country: USA | Subscriber Employer: NW Company | Subscriber Employer Street: 44566 Industry Way | Subscriber Employer City: Portland | Subscriber Employer Zip: 97002 |

Done

As well as the billing codes and amounts.

Mozilla Firefox
 http://localhost/openemr/interface/reports/custom_report_range.php

OpenEMR http://localhost...eport_range.php

Secondary:

| | | | | | |
|---|--|--|--|--|--|
| Provider: MedOne | Plan Name: MedOne Gold | Policy Number: 543216 | Group Number: 1112 | Subscriber First Name: Rod | Subscriber Last Name: Roark |
| Subscriber Relationship: self | Subscriber SS: 111-22-3333 | Subscriber Date of Birth: 1985-08-06 | Subscriber Phone: 503-456-7890 | Subscriber Address: 321 SW Capitol Hwy | Subscriber Zip: 97219 |
| Subscriber City: Portland | Subscriber Country: USA | Subscriber Employer: NW Company | Subscriber Employer Street: 44566 Industry Way | Subscriber Employer City: Portland | Subscriber Employer Zip: 97002 |
| Subscriber Employer State: OR | Subscriber Employer Country: USA | | | | |

Tertiary:

Subscriber SS: Subscriber Date of Birth:
0000-00-00

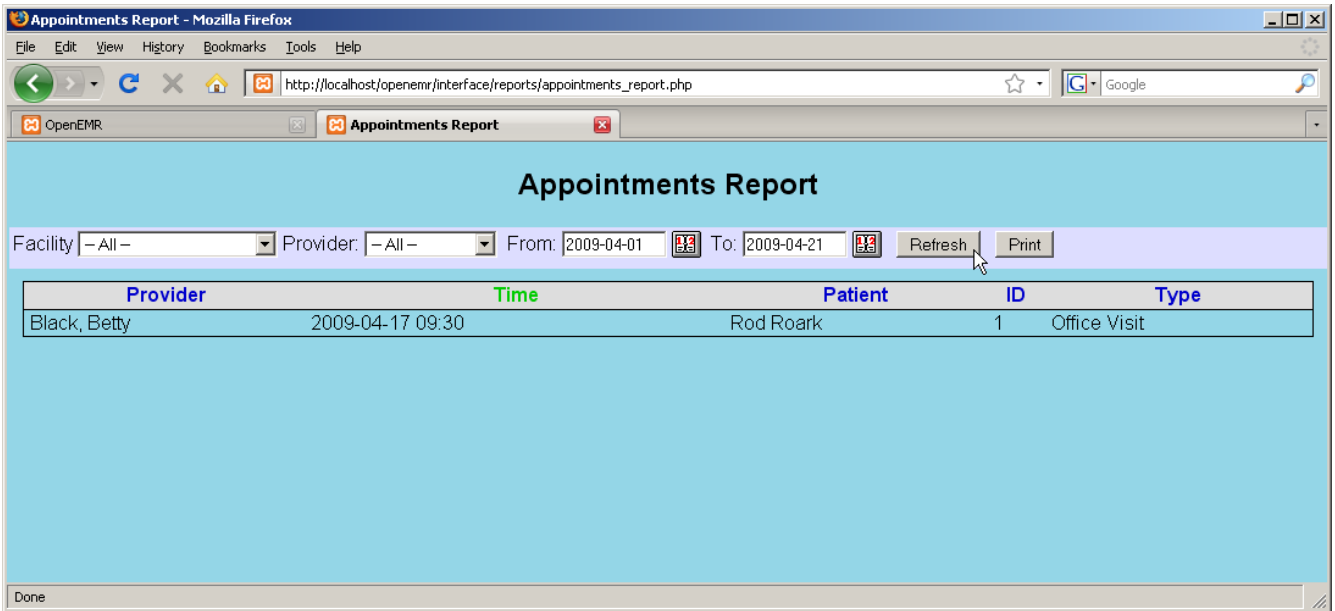
Billing Information:

| Date | Provider | Code | Fee |
|------------------------|-------------|---|--------|
| 2009-04-17 05:38 pm | Betty Black | CPT4: 99203 | 136.57 |
| 2009-04-17 05:38 pm | Betty Black | ICD9: 477.8 Allergic rhinitis, other allergen | 0.00 |
| Sub-Total | | | 136.57 |
| Paid | | | 0.00 |
| Total | | | 136.57 |

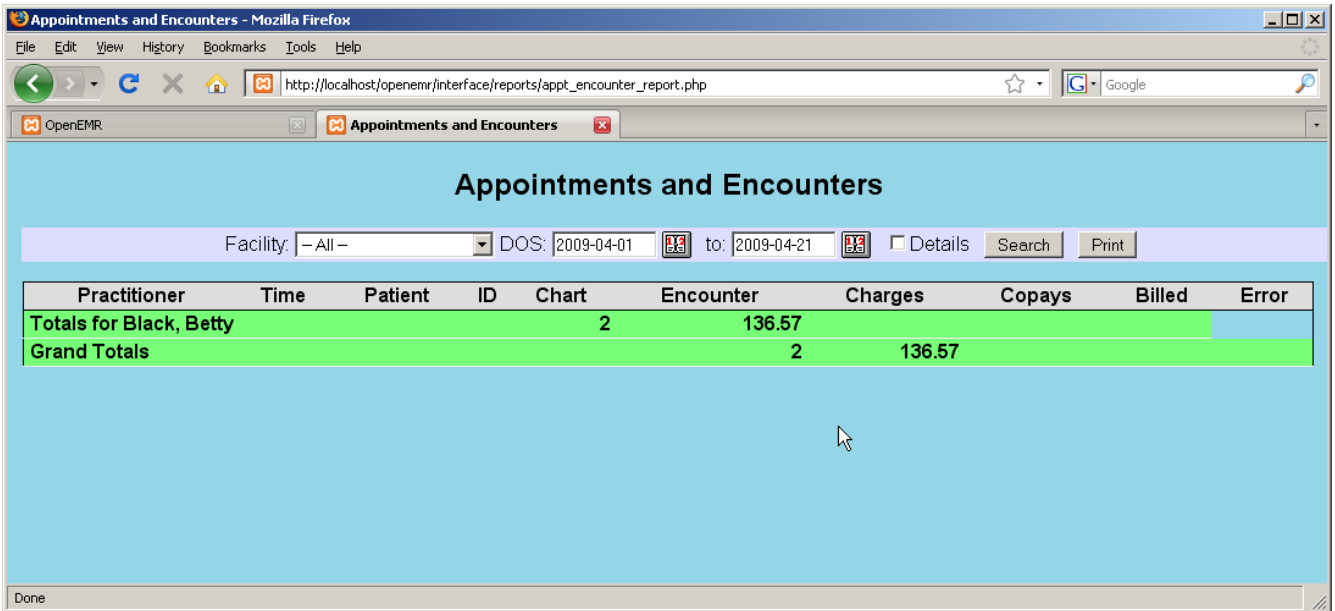
Physician Signature: _____

Done

The Appointments Report gives you a list of appointments for a given provider, or for all providers, in a specified date range. It can be sorted by clicking on any of the four column headings.



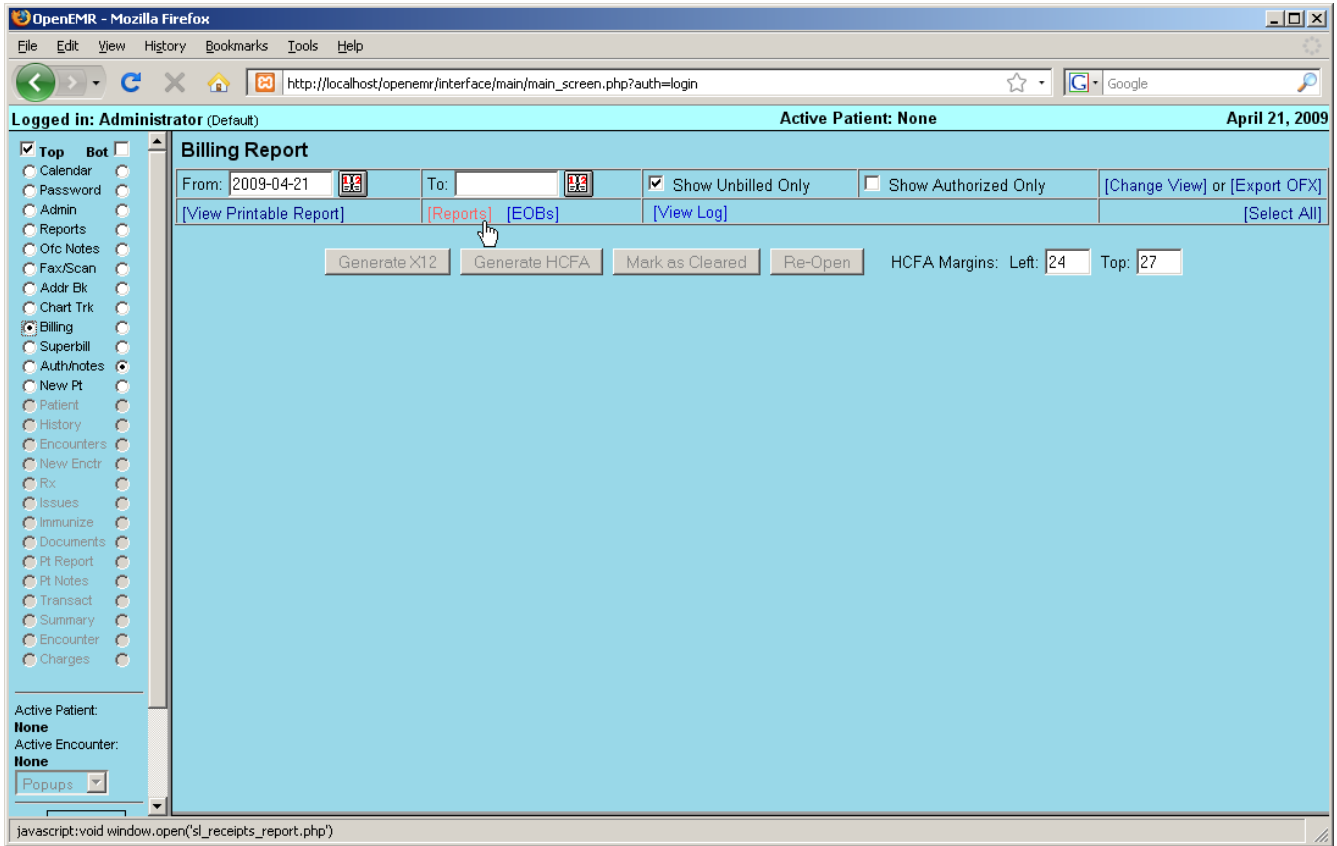
The Appointments and Encounters Report gives you a useful cross-reference of appointments with their corresponding encounters. This allows you to easily spot many types of errors, such as appointments with missing encounters, encounters with missing appointments, missing charges, and authorizations or justifications that are required but not done.



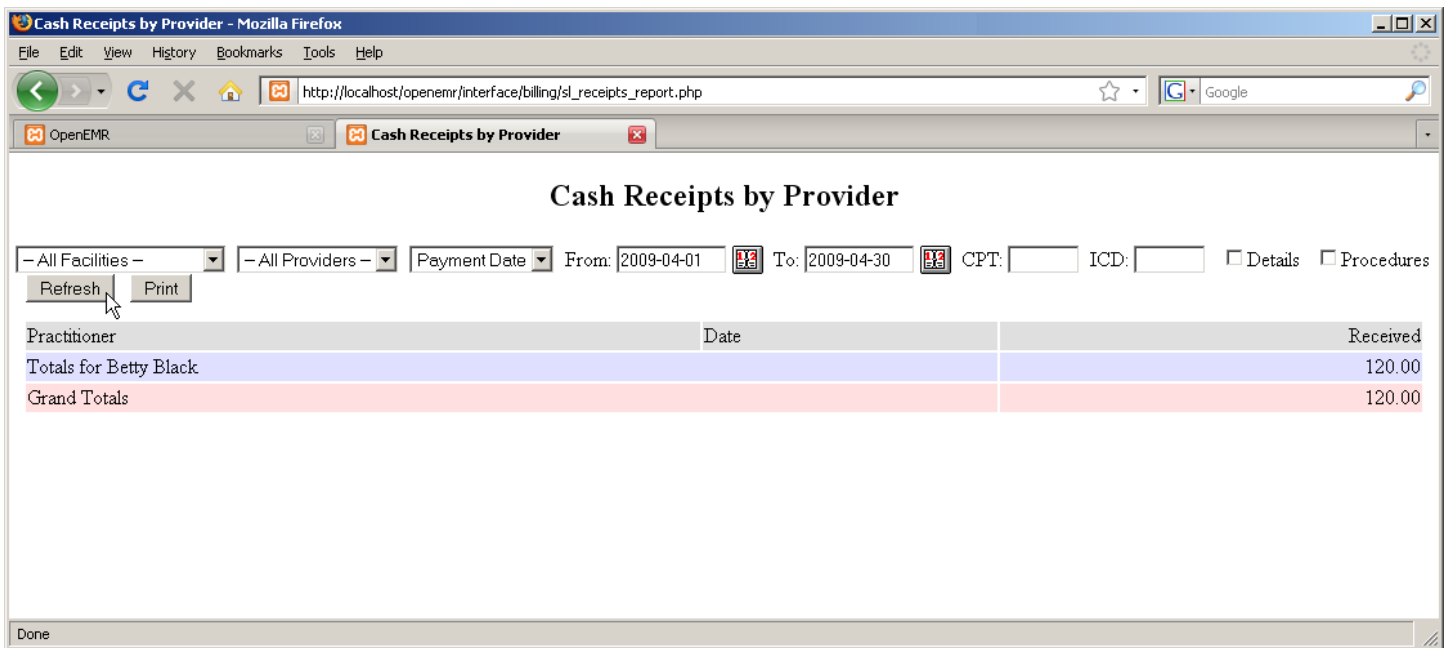
The Insurance Distribution report shows you how many patients seen over a given time period use each kind of insurance.

Billing Reports

From the main Billing page select 'Reports'.



This is the Cash Receipts report. It breaks down gross income by provider for a given time period.



The user can also elect to see a detailed breakdown of cash receipts, itemizing each procedure for which a charge was made.

Cash Receipts by Provider - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/billing/sl_receipts_report.php

OpenEMR Cash Receipts by Provider

Cash Receipts by Provider

- All Facilities - | - All Providers - | Payment Date | From: 2009-04-01 | To: 2009-04-30 | CPT: | ICD: | Details | Procedures

| Practitioner | Date | Invoice | Procedure | Prof. | Clinic |
|------------------------|------------|---------|-----------|--------|--------|
| Betty Black | 2009-04-21 | 1.23 | 99203 | 85.00 | |
| | 2009-04-21 | 1.23 | 99203 | 20.00 | |
| | 2009-04-28 | 1.23 | 99203 | 15.00 | |
| Totals for Betty Black | | | | 120.00 | |
| Grand Totals | | | | 120.00 | |

Done

Patient Reports

When a patient is active within the system, the user has the option of generating a report for that specific patient. To do so, click on 'Pt Report' which is now visible in the navigation menu (found under 'Patient/Client - Medical Record' in Tree View).

OpenEMR - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://localhost/openemr/interface/main/main_screen.php?auth=login

Logged in: Administrator (Default) | Active Patient: Rod Roark (1) DOB: 1985-08-06 Age: 24 | April 21, 2009

Demographics (More) (Delete)

Who
 Name: Mr. Rod Roark | External ID: 1 | Balance Due: \$-0.00
 DOB: 1985-08-06 | Sex: Male | Upcoming Appointments
 S.S.: 111-22-3333 | License/ID: 1234567 | New Appointment

Contact
 Marital Status: Married | User Defined:
 Address: 321 SW Capitol Hwy | City: Portland
 State: | Postal Code: 97219
 Country: USA | Emergency Contact: Wife
 Emergency Phone: 971-222-3333 | Home Phone: 503-456-7890
 Work Phone: 503-112-3334 | Mobile Phone: 971-564-7896
 Contact Email: mr.rod@gmail.com | Provider: Betty Black

Choices

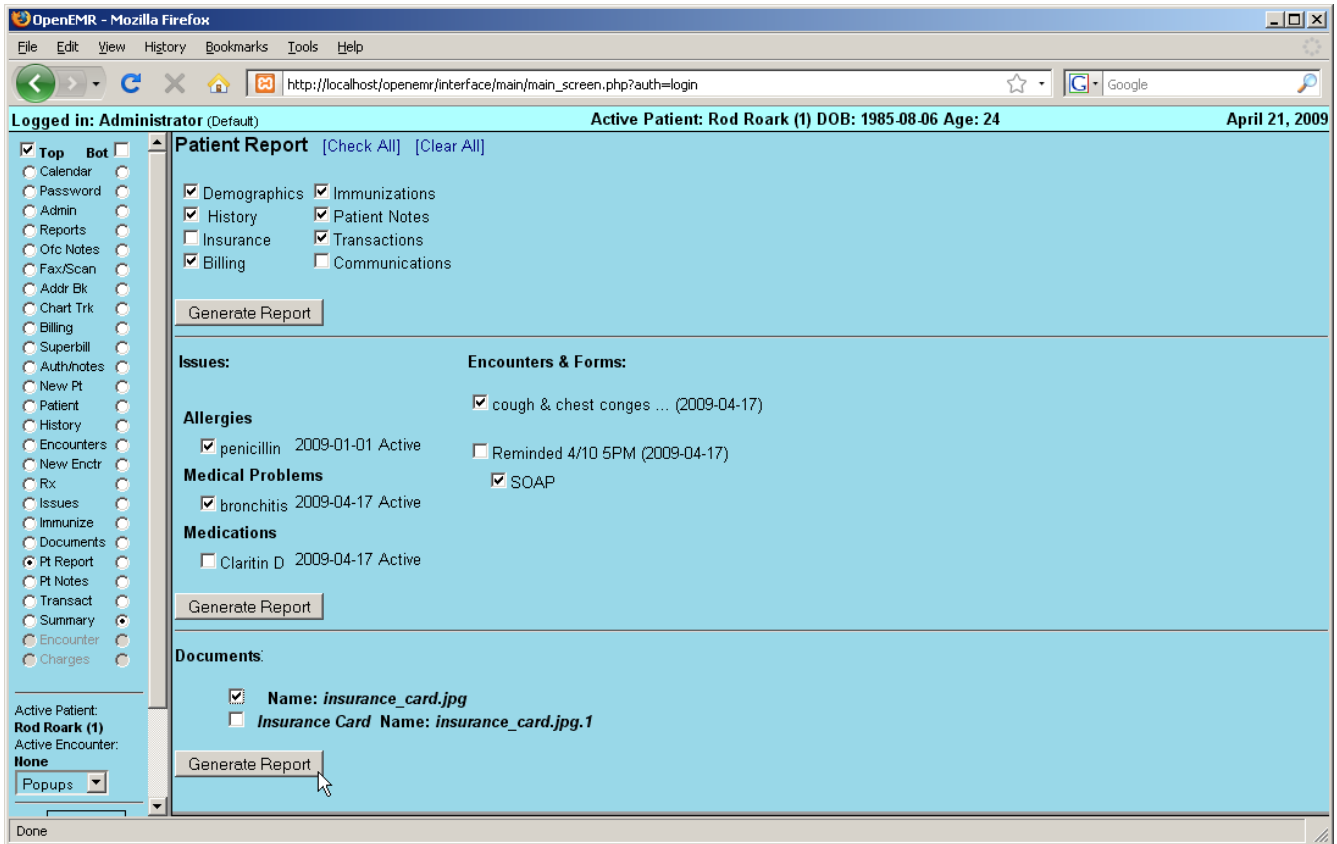
Medical Problems (More)
 - bronchitis
Allergies (More)
 - penicillin
Medications (More)
 - Claritin D
Immunizations (More)
 - 2009-04-21 - DT 1
Prescriptions
 Claritin D 1 in tablet q.d.

Notes (More)
 Insurance 2009-04-21 14:51 (cyan to cyan) New employer & insurance effective as of 5-1-2009.

Active Patient: Rod Roark (1)
 Active Encounter: None
 Popups:
 Find:
 by: Name ID
 SSN DOB
 Logout

Done

The user can choose to include or omit a wide variety of patient information. When satisfied with your selections, click 'Generate Report'.



This produces a report including all the specified patient information.

