

# OpenEMR Users Guide

Based on Version 3.0.1

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## Getting Started

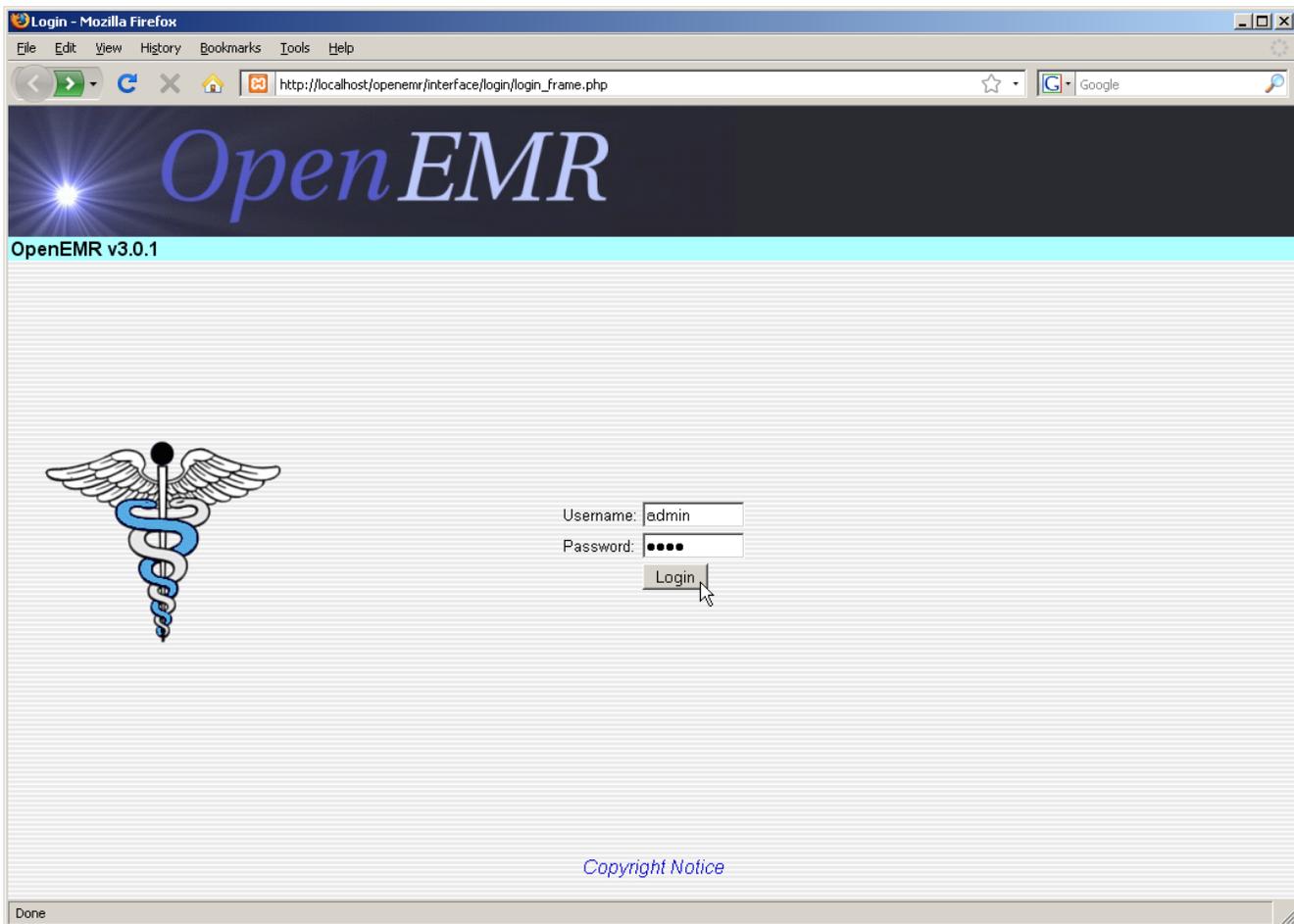
### Getting to the Login Page

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:

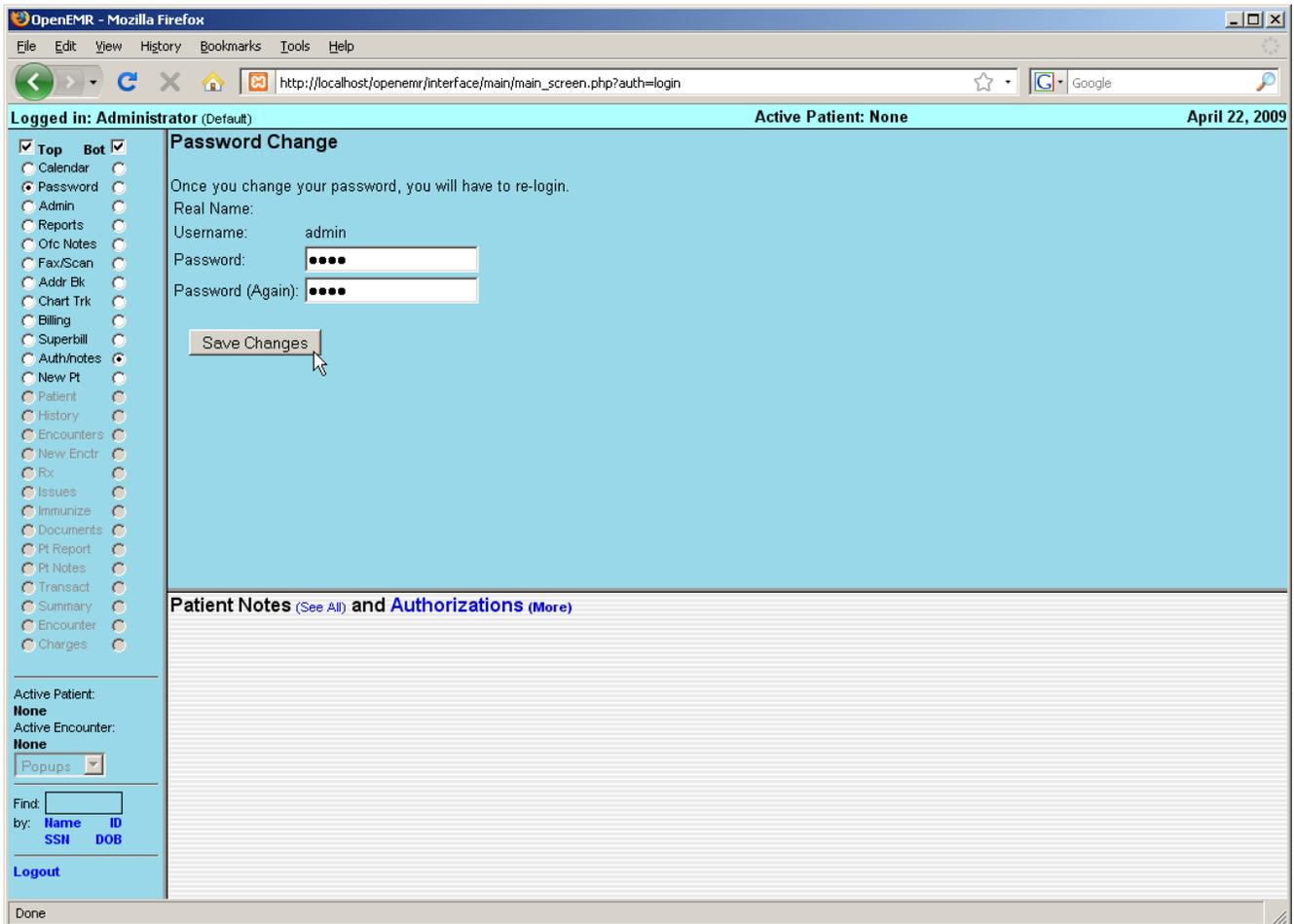


### Logging In

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.



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

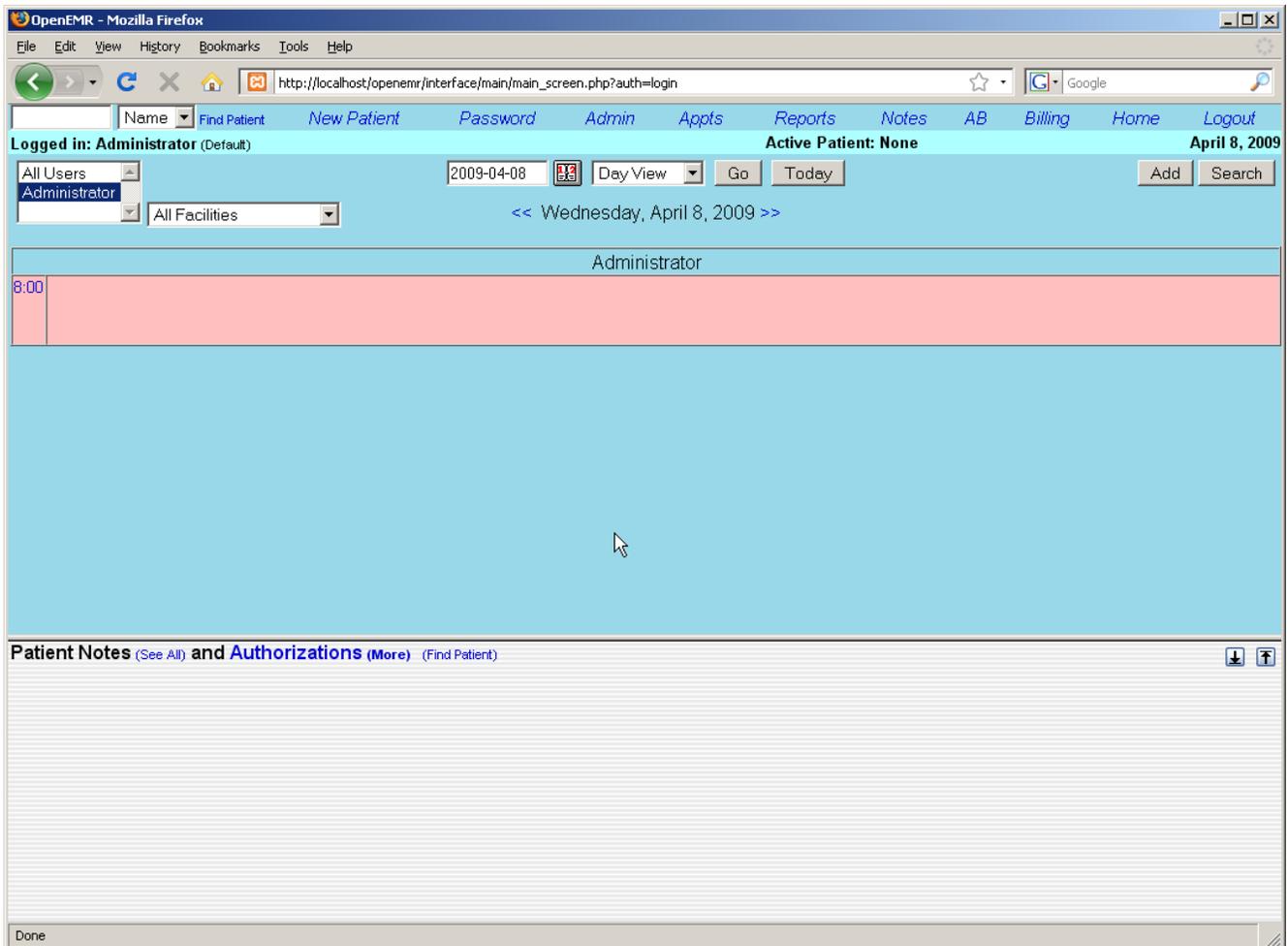
A successful login will bring you to the main screen of OpenEMR. The user is presented with two windows, the Calendar, and below that, the Patient Notes & Authorizations page.

### 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.

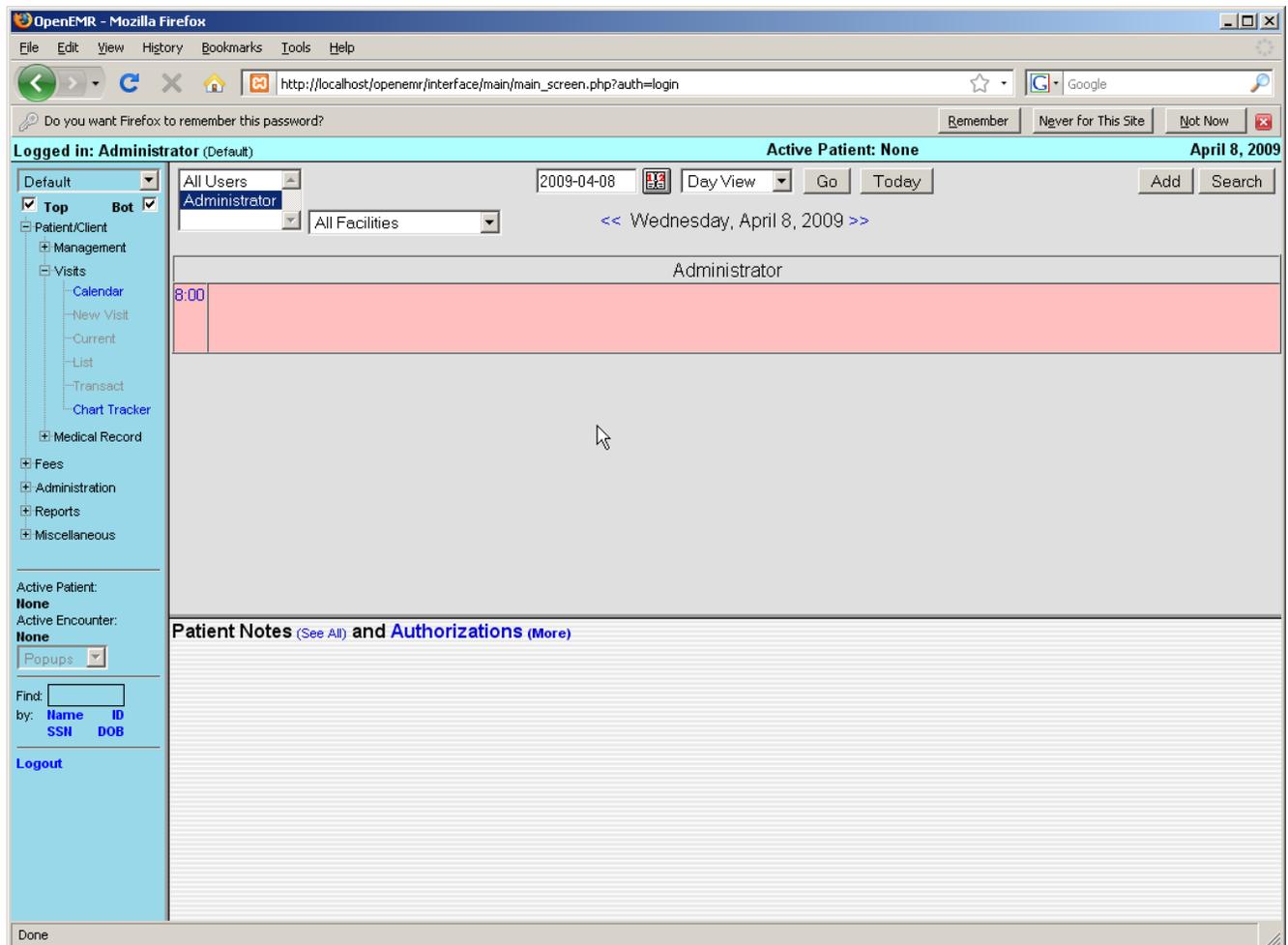


In the Traditional navigation scheme related pages are linked. Pages load simultaneously to facilitate the data entry process.

## Tree View

The Tree View 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 scheme is the default navigation scheme for OpenEMR 3.0. It 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.

For the purposes of this Users Guide, we will assume you are using the default navigation scheme, the Radio Button scheme described above.

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.

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 title is "OpenEMR - Mozilla Firefox". The top navigation bar includes "Users", "Forms", "Practice", "ACL", "Calendar", "Database", "Notification", "Language", "Lists", "Layouts", "Backup", and "Logs". The user is logged in as "Administrator (Default)" and the active patient is "None". The date is "April 8, 2009".

The main content area is titled "User and Facility Administration". It contains two main sections:

- New Facility Information:** A form with fields for Name, Phone, Address, City, State, Zip Code, Country, Federal EIN, and Facility NPI. An "Add" button is located below the Facility NPI field.
- Edit Facilities:** A section with a link "(Edit)" next to "Your Clinic Name Here". Below this is a "New User" form with fields for Username, Password, Groupname (set to "Default"), First Name, Last Name, Federal Tax ID, UPIN, NPI, Taxonomy (set to "207Q00000X"), and Calendar UI (set to "Default").

The left sidebar contains a navigation menu with various options like "Calendar", "Password", "Admin", "Reports", etc. The bottom of the page shows a search bar and a "Logout" button.

This will bring up the User & 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.

### 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.

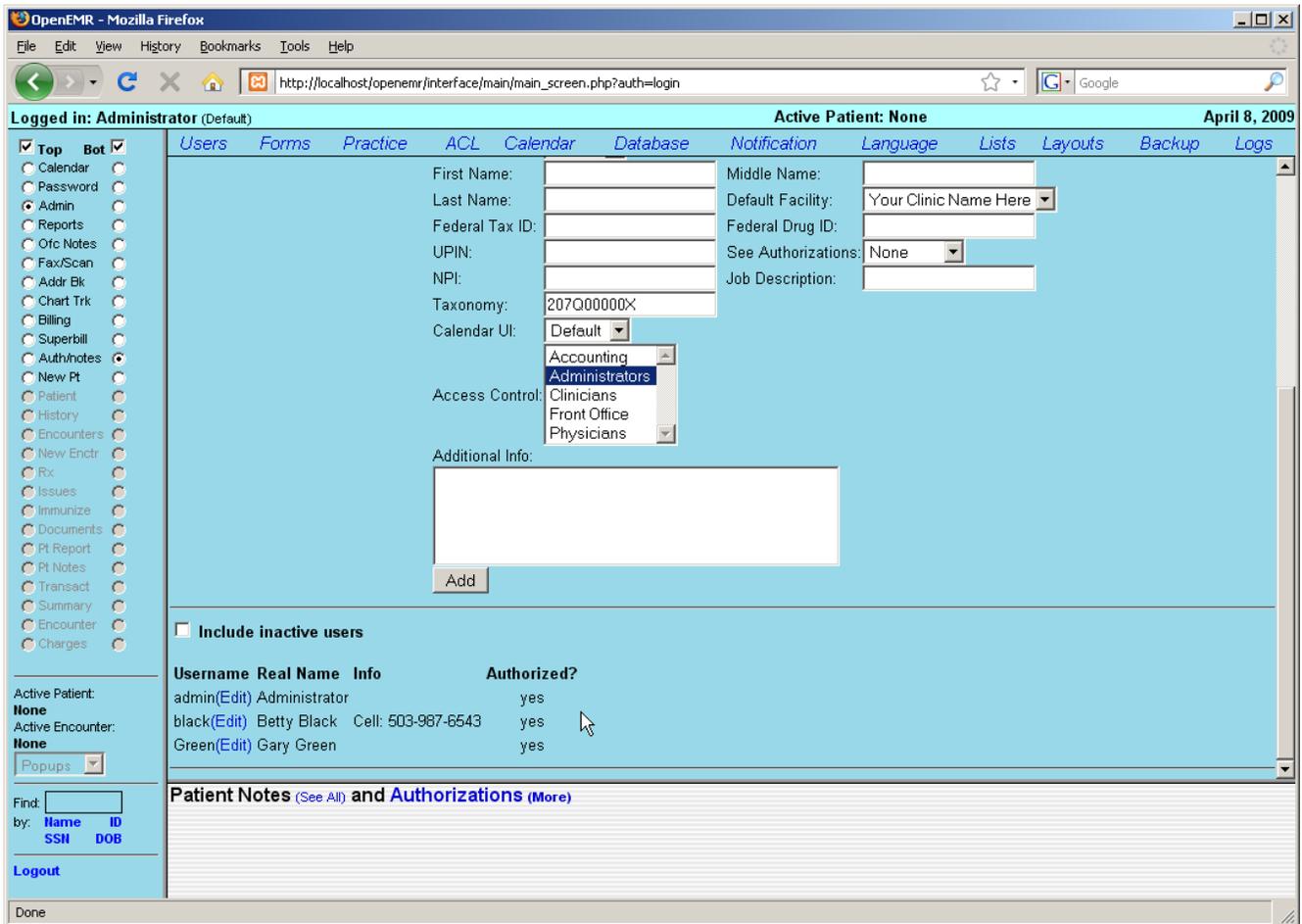
When you are finished entering your clinic's information click the 'Update' button, then click 'Back' to return to the User & Facility Administration page.

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

The bottom of the User & Facility Admin 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 & Facility Information 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:

- Accounting
- Administrators
- Clinicians
- Front Office
- Physicians

Additional Info:

Cell: 503-987-6543

[\[Back\]](#)

Active Patient: **None**

Active Encounter: **None**

Find:

by: **Name ID**

**SSN DOB**

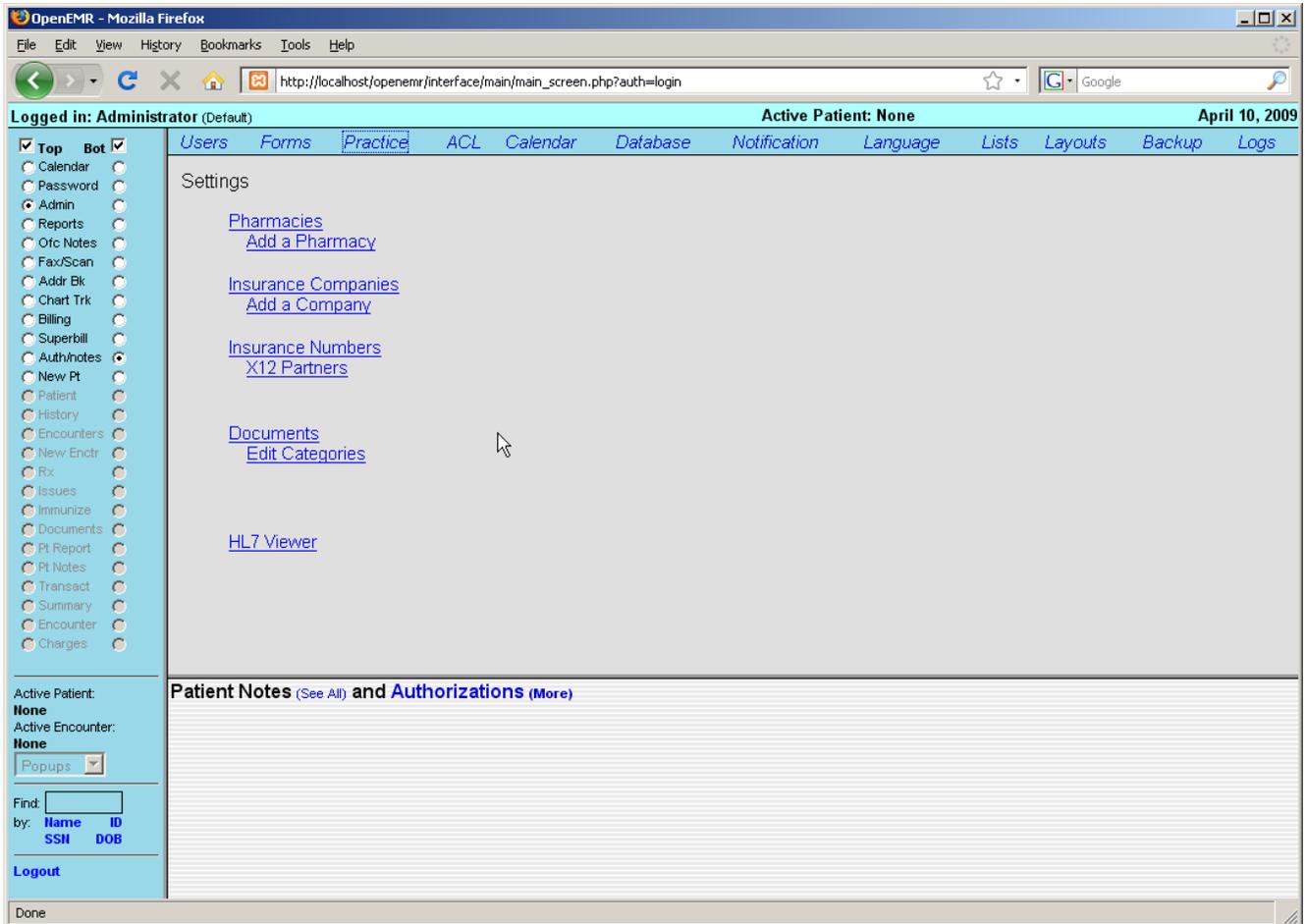
[Logout](#)

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

## Practice Administration

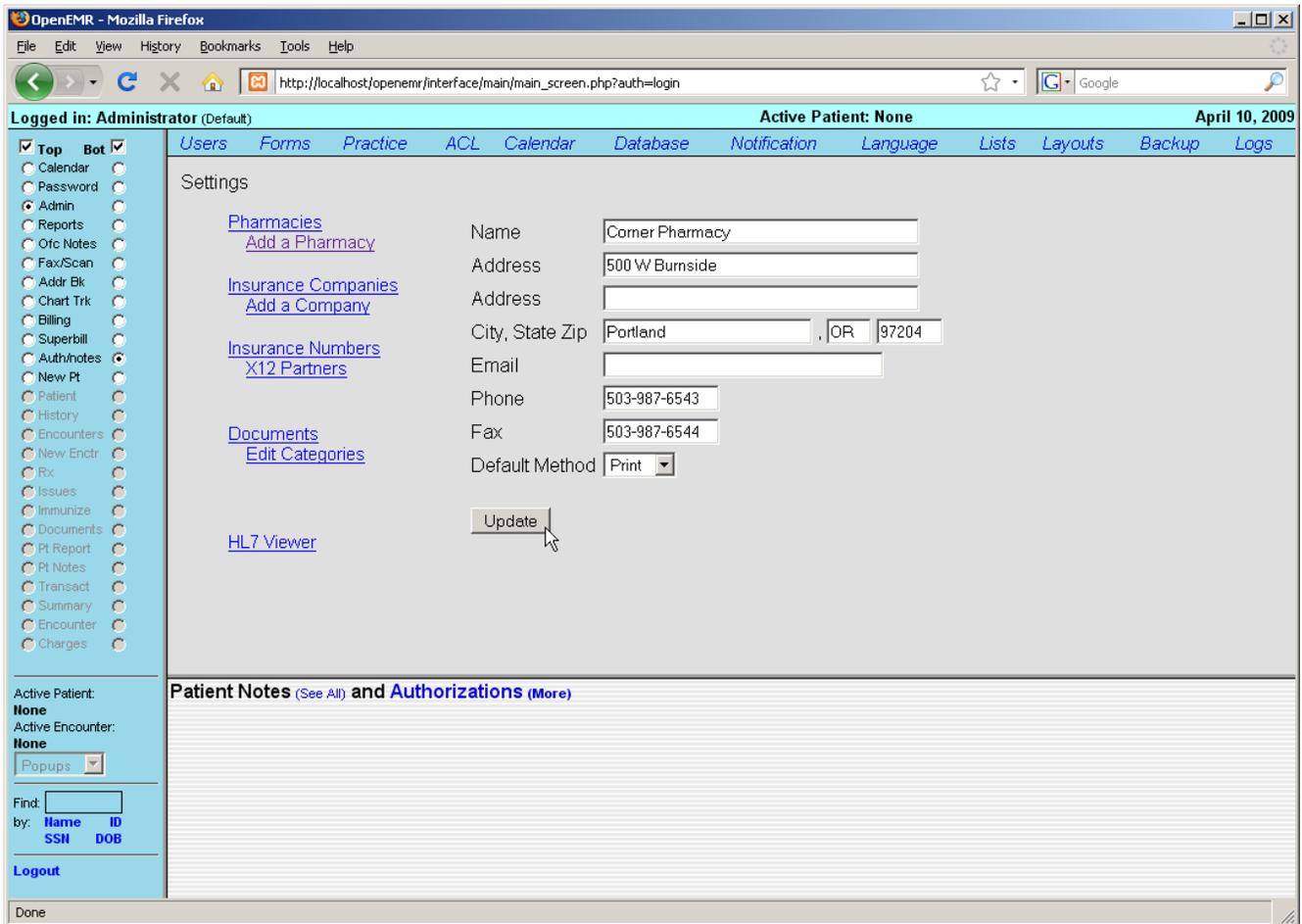
Next you'll need to enter the relevant practice information for your clinic. This includes pharmacy and insurance company information, as well as the types of documents your clinic accepts.

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



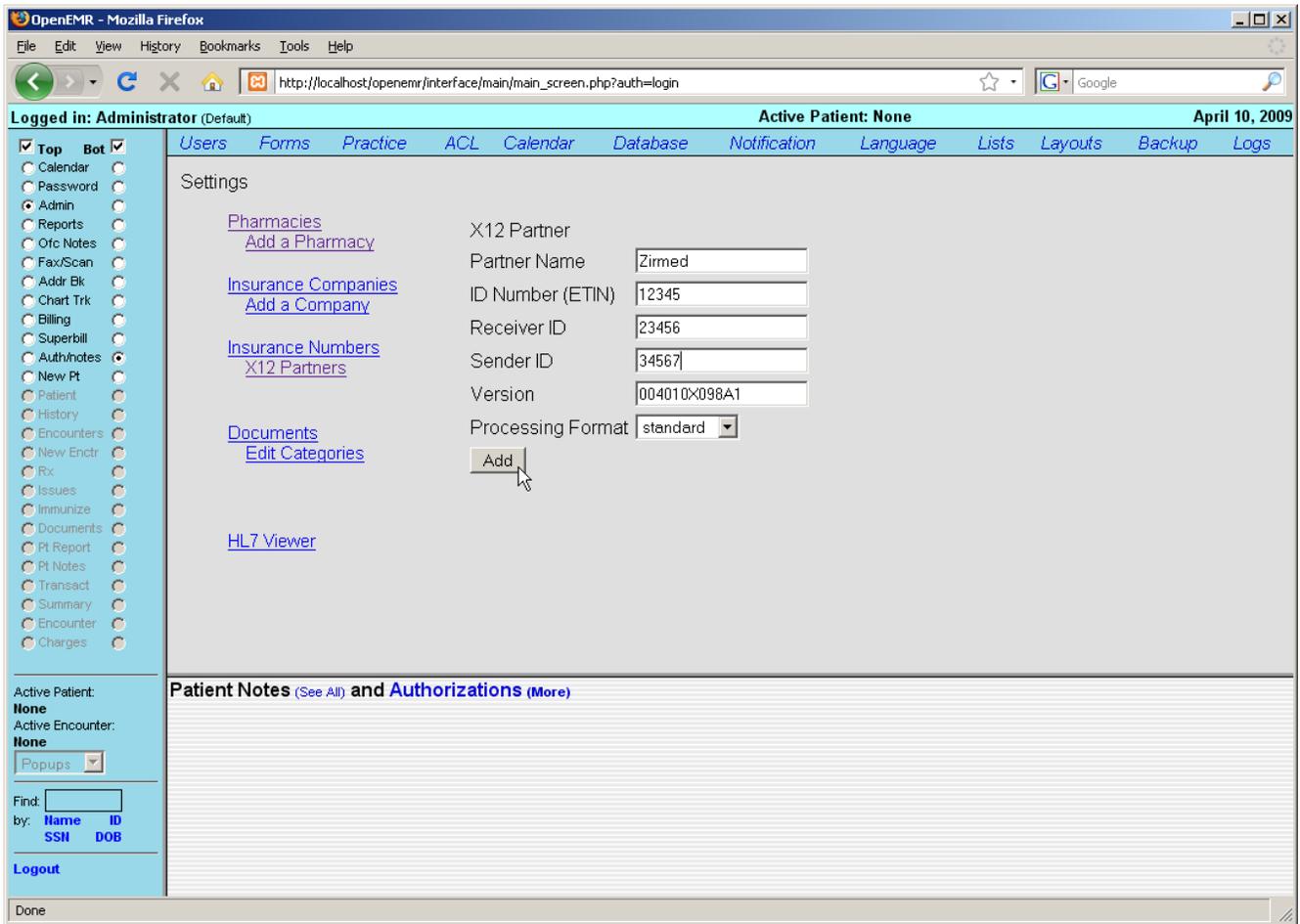
The screenshot shows the OpenEMR interface in Mozilla Firefox. The browser title is "OpenEMR - Mozilla Firefox" and the address bar shows "http://localhost/openemr/interface/main/main\_screen.php?auth=login". The page is logged in as "Administrator (Default)" on "April 10, 2009". The "Active Patient" is "None". The "Practice" tab is selected in the top navigation menu. The main content area is titled "Settings" and contains several sections of links: "Pharmacies" with a sub-link "Add a Pharmacy"; "Insurance Companies" with a sub-link "Add a Company"; "Insurance Numbers" with a sub-link "X12 Partners"; "Documents" with a sub-link "Edit Categories"; and "HL7 Viewer". A left sidebar contains a list of menu items with checkboxes, including "Calendar", "Password", "Admin", "Reports", "Ofc 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", and "Charges". At the bottom left, there are fields for "Active Patient: None", "Active Encounter: None", a "Popups" dropdown, a "Find:" search box, and a "Logout" button. The status bar at the bottom says "Done".

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'.



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
<a href="#">MedOne</a>	South San Francisco CA	Zirmed
<a href="#">Pacific Health</a>	Pasadena CA	Zirmed

Insurance Companies  
[Add a Company](#)

Insurance Numbers  
[X12 Partners](#)

Documents  
[Edit Categories](#)

[HL7 Viewer](#)

Active Patient: None  
Active Encounter: None  
Popups

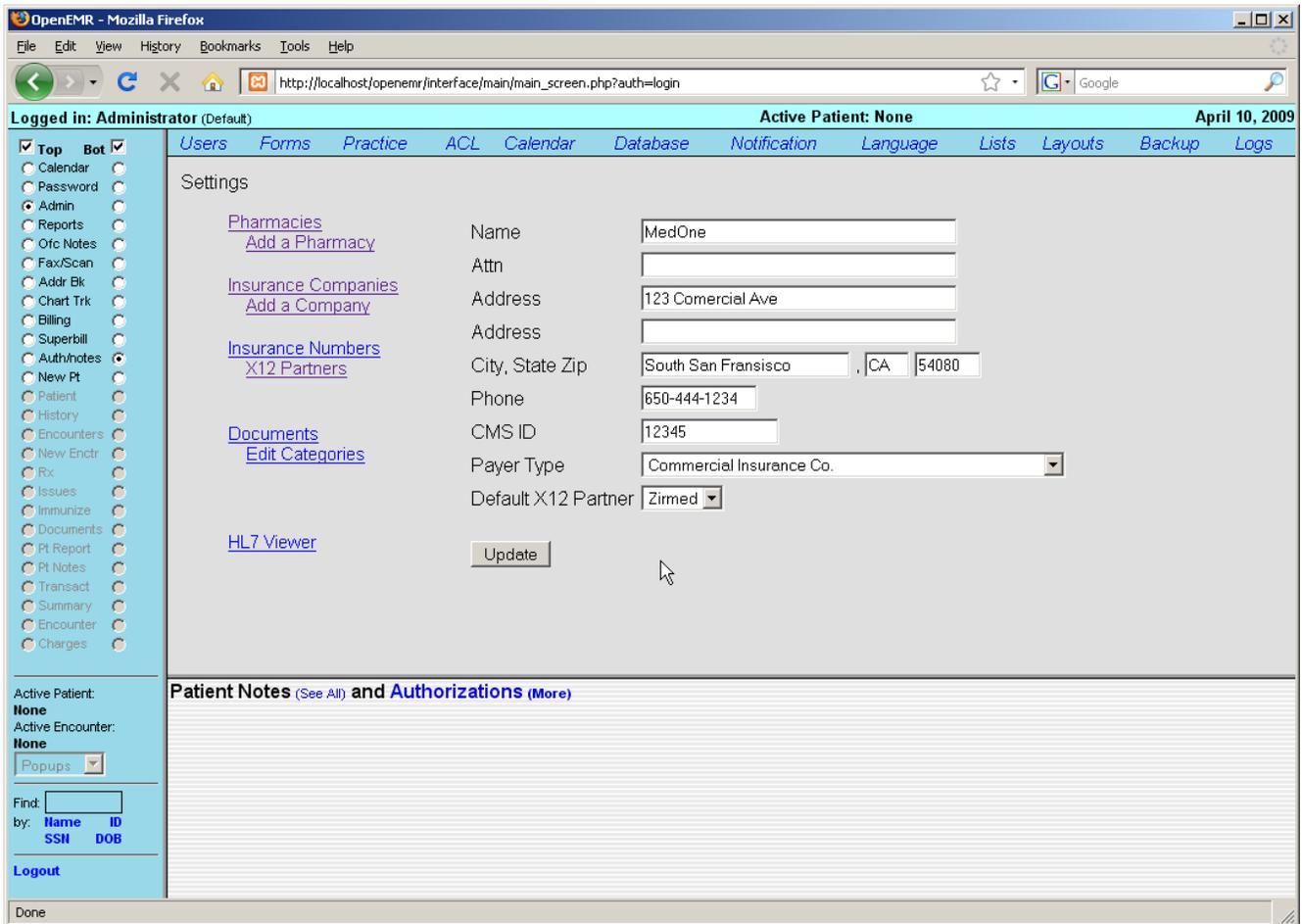
Find:   
by: [Name](#) [ID](#)  
[SSN](#) [DOB](#)

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 #
<a href="#">Administrator</a>	Default	22334	01234
<a href="#">Betty Black</a>	Default		
<a href="#">Gary Green</a>	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](#)

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

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

Documents  
[Edit Categories](#)

HL7 Viewer

Provider Administrator  
 MedOne

Provider # 22334  
 Rendering Provider #  
 Group # 01234

Add New...

Insurance Company Default Type: [v]  
 Provider Number Unspecified Type: [v]  
 Rendering Provider Number Unspecified Type: [v]  
 Group Number [ ]

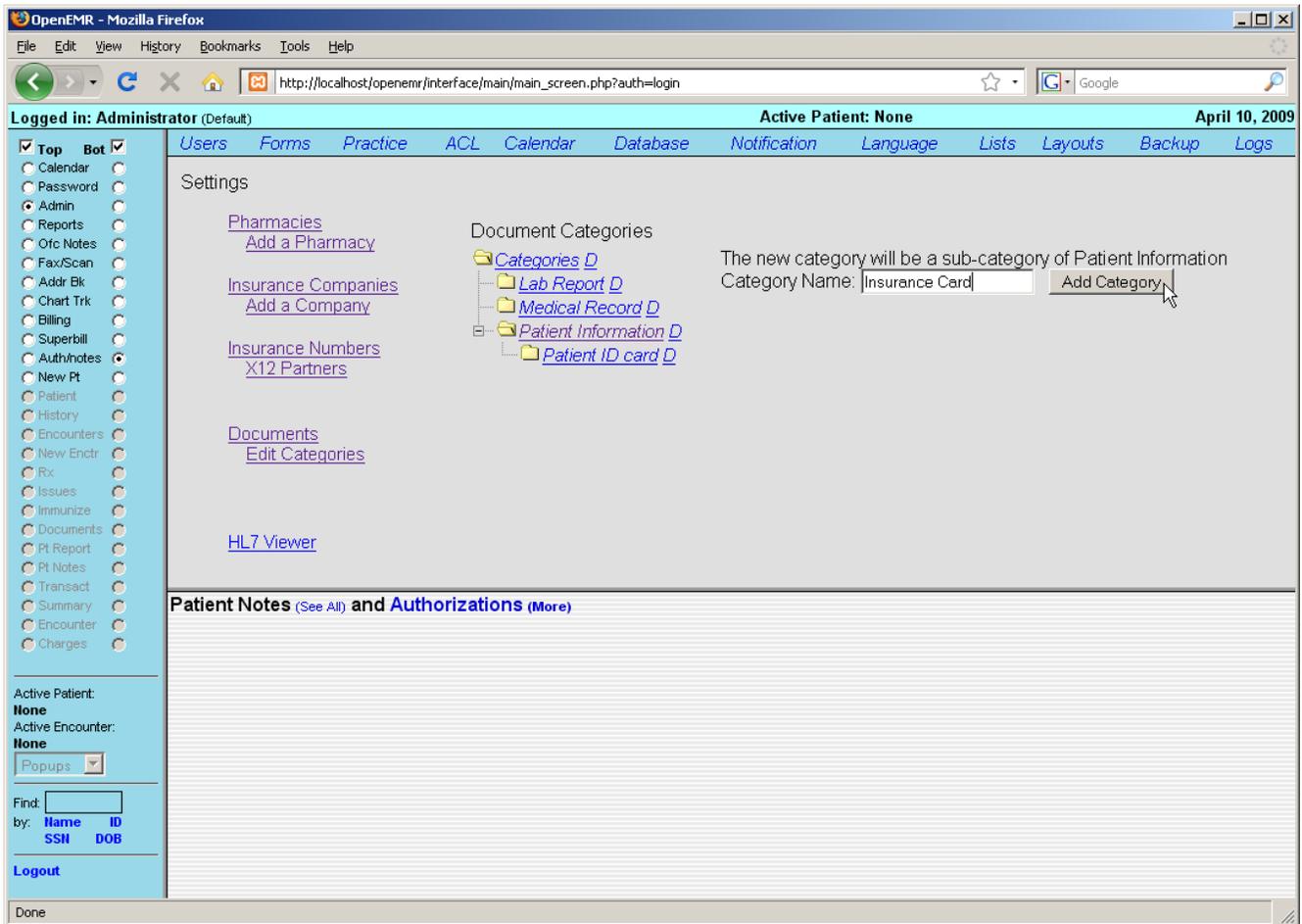
Update

Active Patient: None  
 Active Encounter: None  
 Popups [v]  
 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.

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:** Language

ID	Title	Order	Default
English	English	1	<input checked="" type="checkbox"/>
Spanish	Spanish	2	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Save

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

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

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

[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

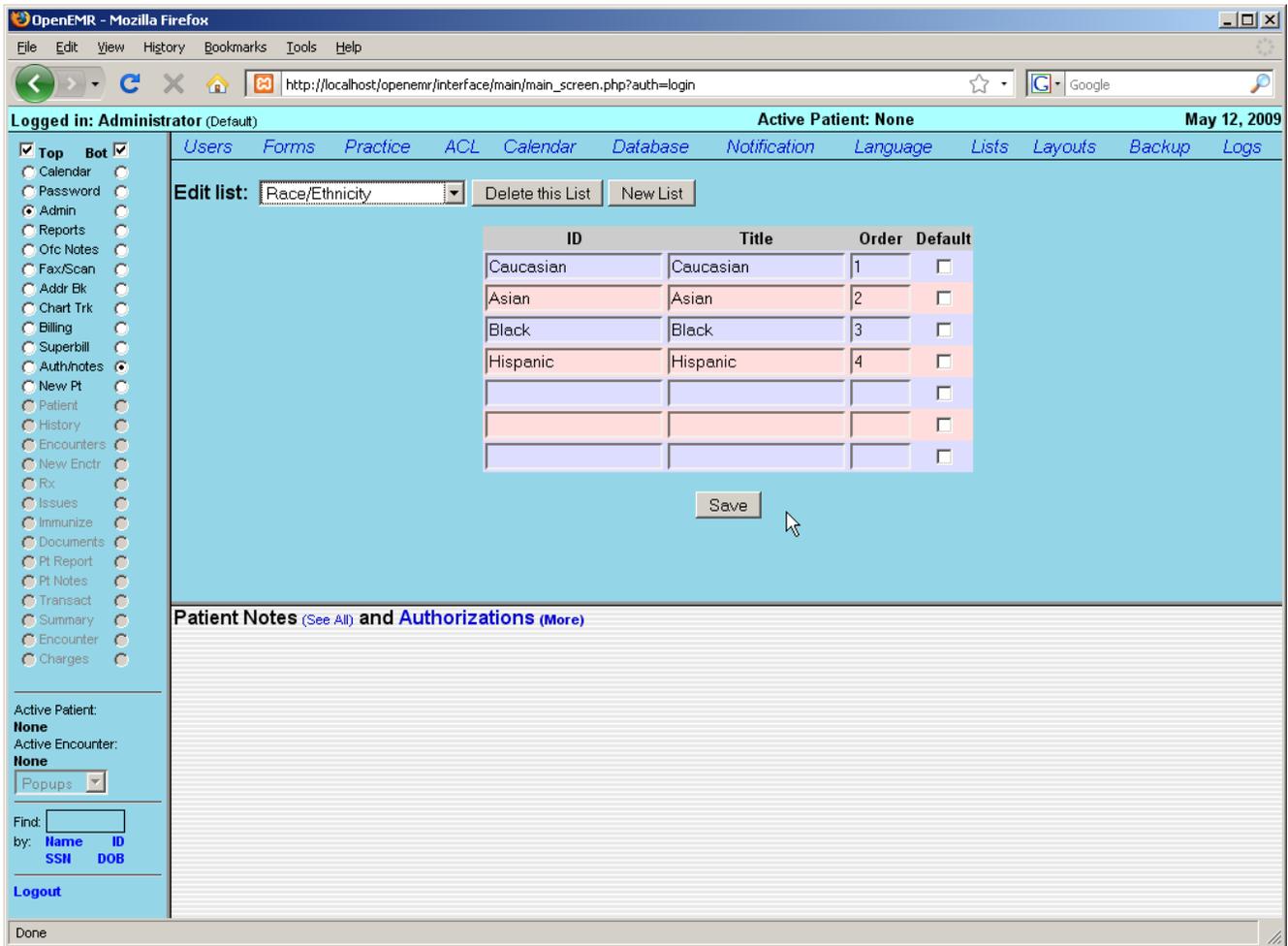
Done

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' 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   
 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](#)

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.

**Add New Person - Mozilla Firefox**

http://localhost/openemr/interface/usergroup/addrbook\_edit.php?userid=0

**Name:** Dr.  **Last:**  **First:**  **Middle:**

**Specialty:**

**Organization:**

**Valedictory:**

**Home Phone:**  **Mobile:**

**Work Phone:**  **2nd:**  **Fax:**

**Assistant:**

**Email:**

**Website:**

**Main Address:**

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

**Alt Address:**

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

**UPIN:**  **NPI:**  **TIN:**  **Taxonomy:**

**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   
 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
Orange, Ophelia		Dermatology	503-222-3344		503-222-3345		4456 SE Washington St.	Portland	OR	97215

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

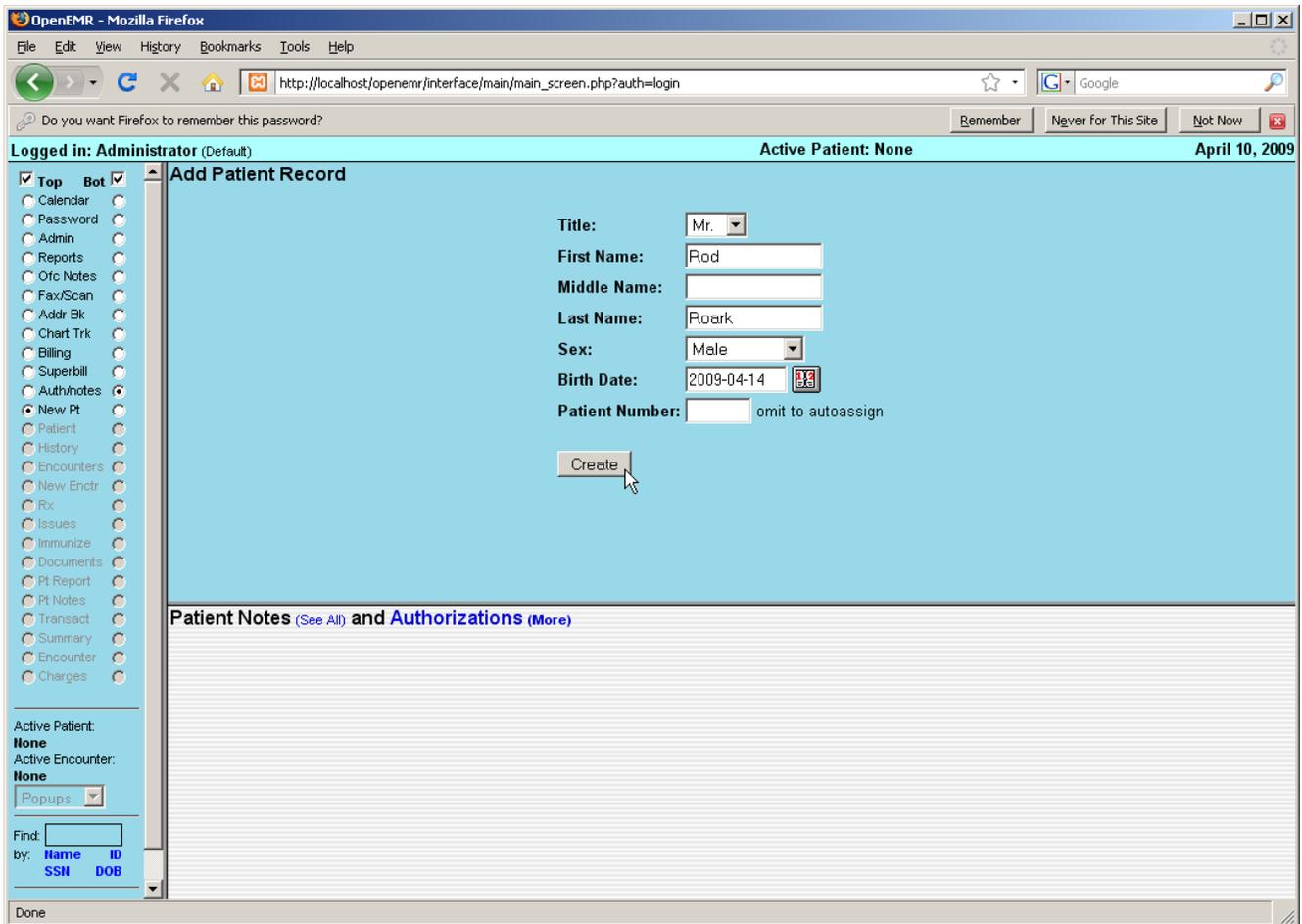
## Adding A New Patient

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.

### Patient Demographics

Enter the patient's name & birth date. If you have an existing chart for this patient, you may enter the chart number in here. 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 'Create'.



The screenshot shows the OpenEMR interface in a Mozilla Firefox browser. The browser window title is "OpenEMR - Mozilla Firefox". The address bar shows the URL: `http://localhost/openemr/interface/main/main_screen.php?auth=login`. The browser status bar indicates "Logged in: Administrator (Default)", "Active Patient: None", and the date "April 10, 2009".

The main content area is titled "Add Patient Record" and contains the following form fields:

- Title:
- First Name:
- Middle Name:
- Last Name:
- Sex:
- Birth Date:
- Patient Number:   omit to autoassign

Below the form is a "Create" button. At the bottom of the form area, there is a section for "Patient Notes (See All) and Authorizations (More)".

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

- Top
- Bot
- Calendar
- Password
- Admin
- Reports
- Ofc 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: None", "Active Encounter: None", a "Popups" dropdown menu, and a "Find:" search box with options for "Name", "ID", "SSN", and "DOB".

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: Home Phone:  
 Emergency Phone: Mobile Phone:  
 Work 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:  
 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: Migrant/Seasonal:  
 Interpreter:

**Employer**

**Stats**

[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.

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](#)

### Demographics (Back)

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  
 Choices  
 Employer  
 Stats  
 Insurance

[Save Patient Demographics]

Patient Notes (See All) and Authorizations (More)

Done

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)

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  
 Language: English Race/Ethnicity: Caucasian

**Stats**  
 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. 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

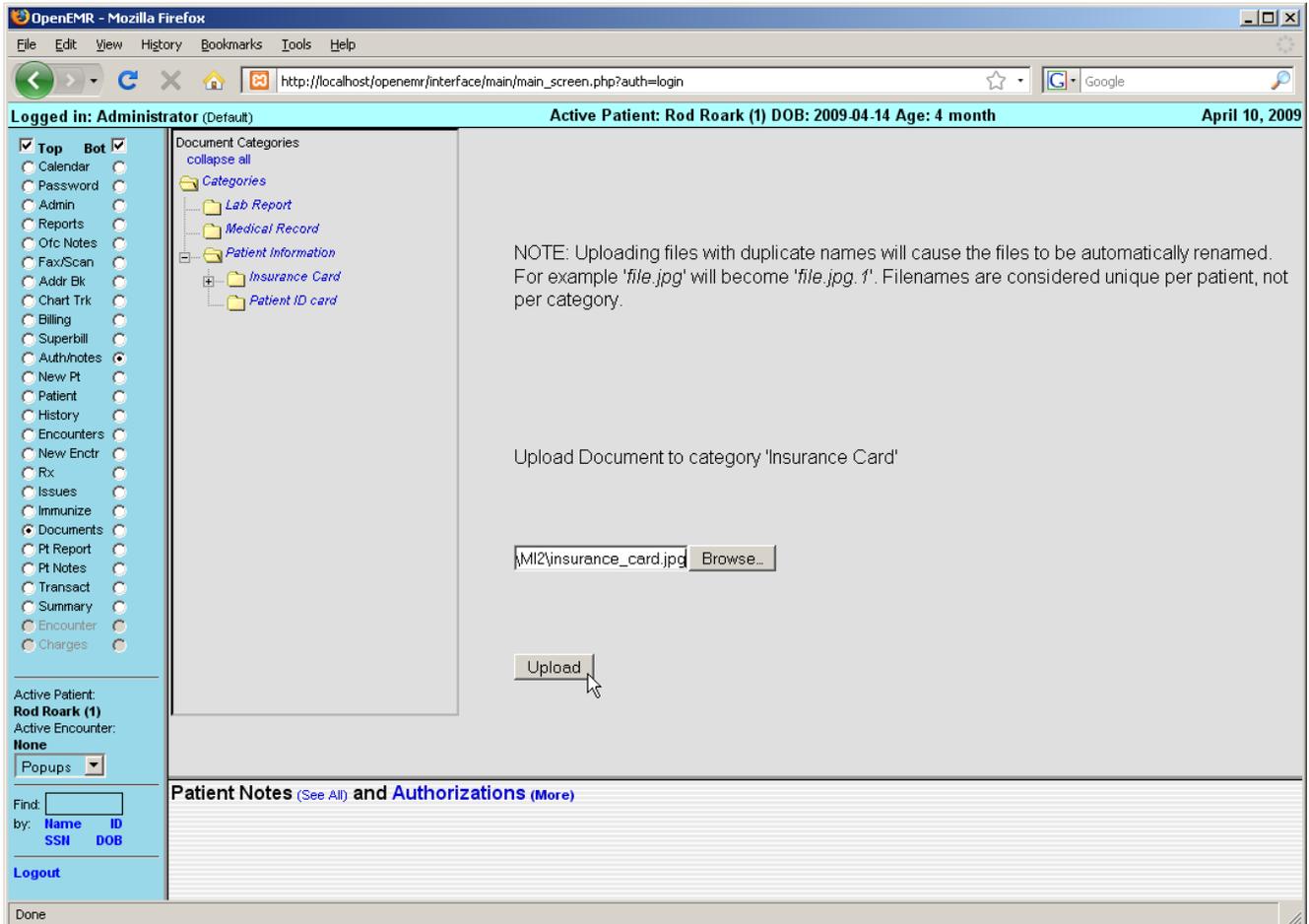
Find:   
 by: Name ID  
 SSH DOB

Logout

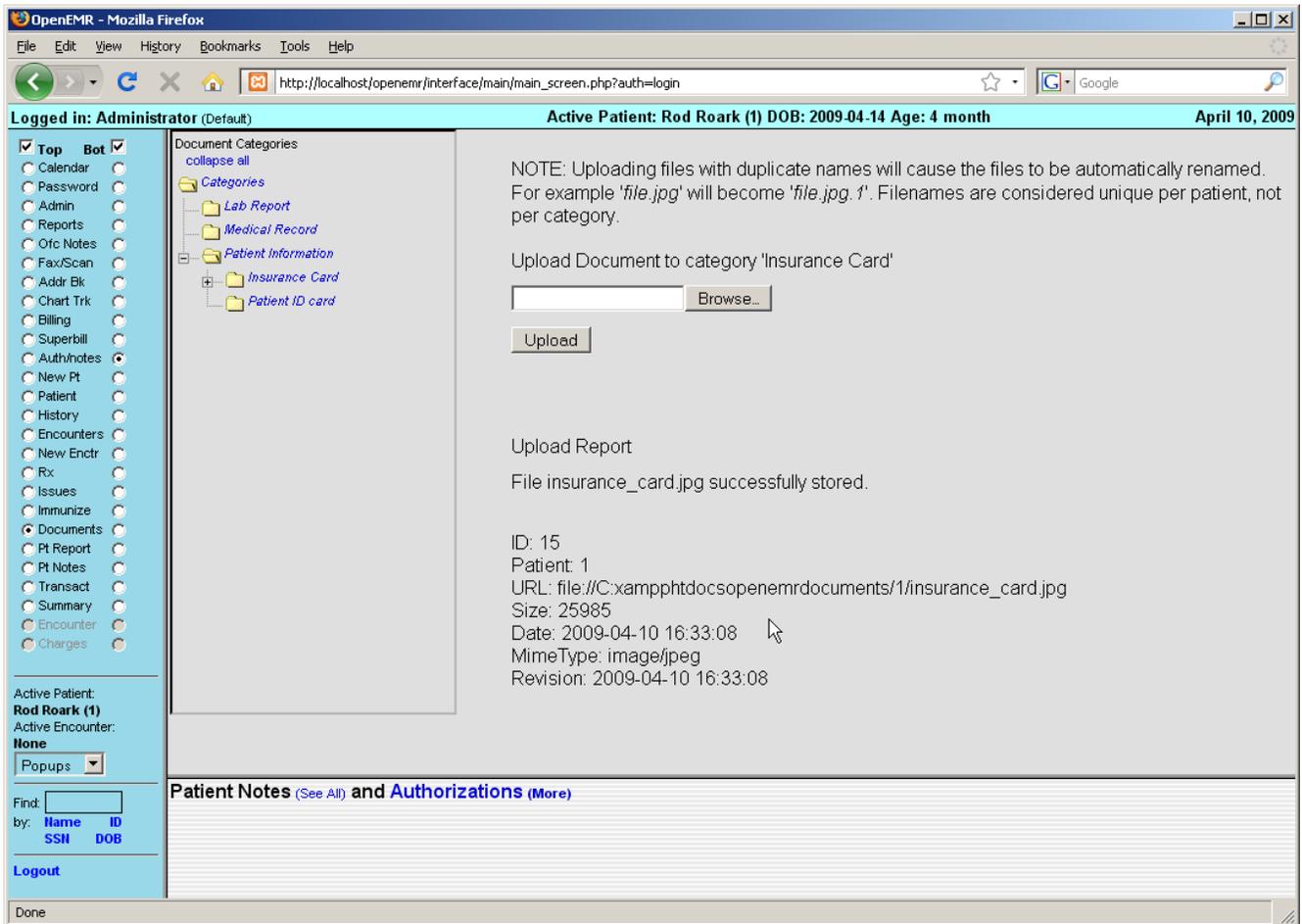
Access the desired sections by clicking on the appropriate check box, and enter in the patient's data as necessary, then click 'Save'.

## 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					
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">GROUP #: XXXXXX-XXX-XXX</td> <td style="width: 50%;">PRESCRIPTION GROUP #: XXXXX</td> </tr> </table>		GROUP #: XXXXXX-XXX-XXX	PRESCRIPTION GROUP #: XXXXX		
GROUP #: XXXXXX-XXX-XXX	PRESCRIPTION GROUP #: XXXXX				
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">PCP CO-PAY: \$15.00</td> <td style="width: 50%;">PRESCRIPTION CO-PAY: \$15 GENERIC</td> </tr> <tr> <td>SPECIALIST CO-PAY: \$25.00</td> <td>EMER. ROOM CO-PAY: \$75.00</td> </tr> </table>		PCP CO-PAY: \$15.00	PRESCRIPTION CO-PAY: \$15 GENERIC	SPECIALIST CO-PAY: \$25.00	EMER. ROOM CO-PAY: \$75.00
PCP CO-PAY: \$15.00	PRESCRIPTION CO-PAY: \$15 GENERIC				
SPECIALIST CO-PAY: \$25.00	EMER. ROOM CO-PAY: \$75.00				
<small>MEMBER SERVICES: 1-800-XXX-XXXX CLAIMS/INQUIRIES: 1-800-XXX-XXXX</small>					

Active Patient:  
**Rod Roark (1)**

Active Encounter:  
**None**

Popups

Find:

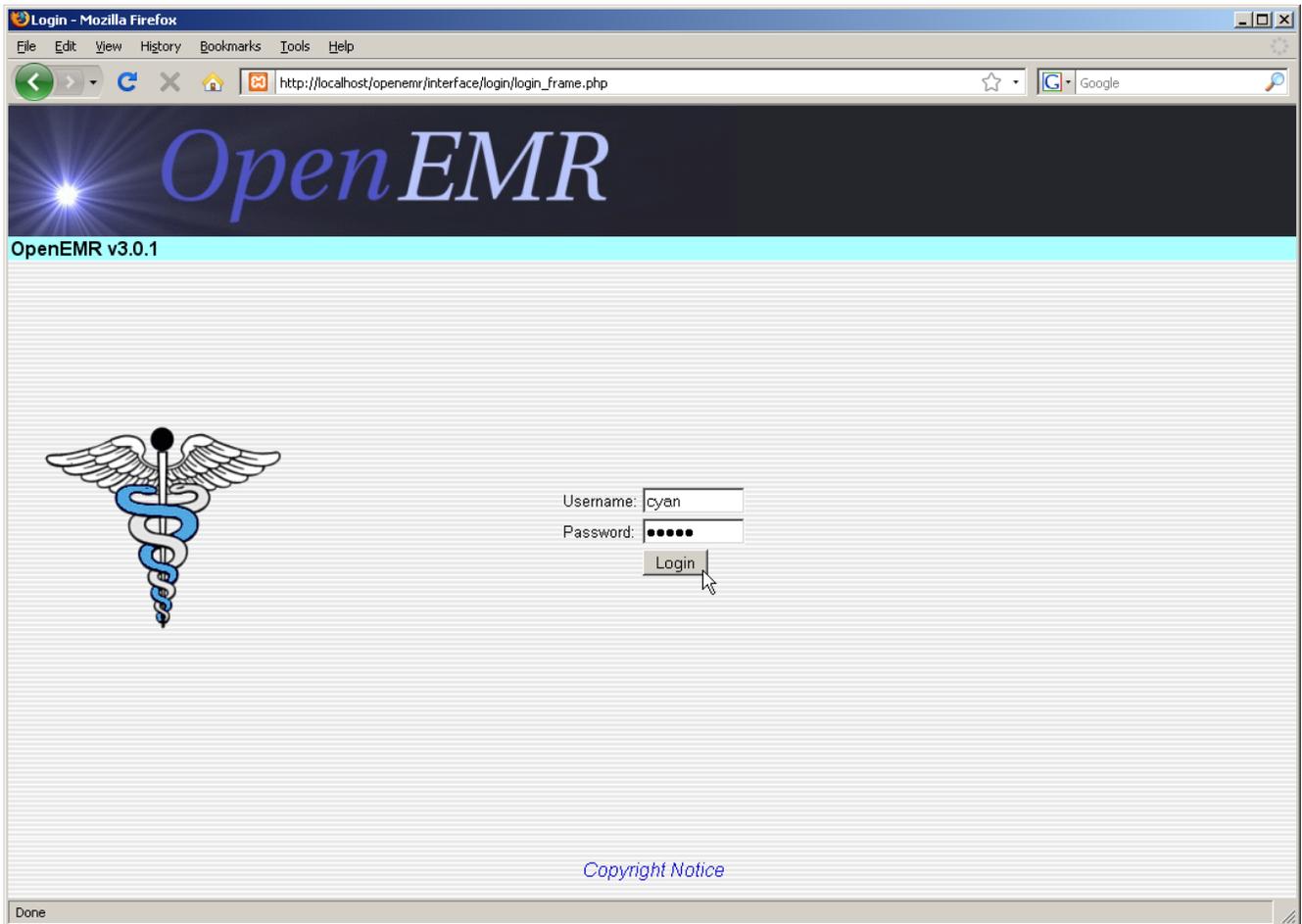
by: **Name ID**  
**SSN DOB**

**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.

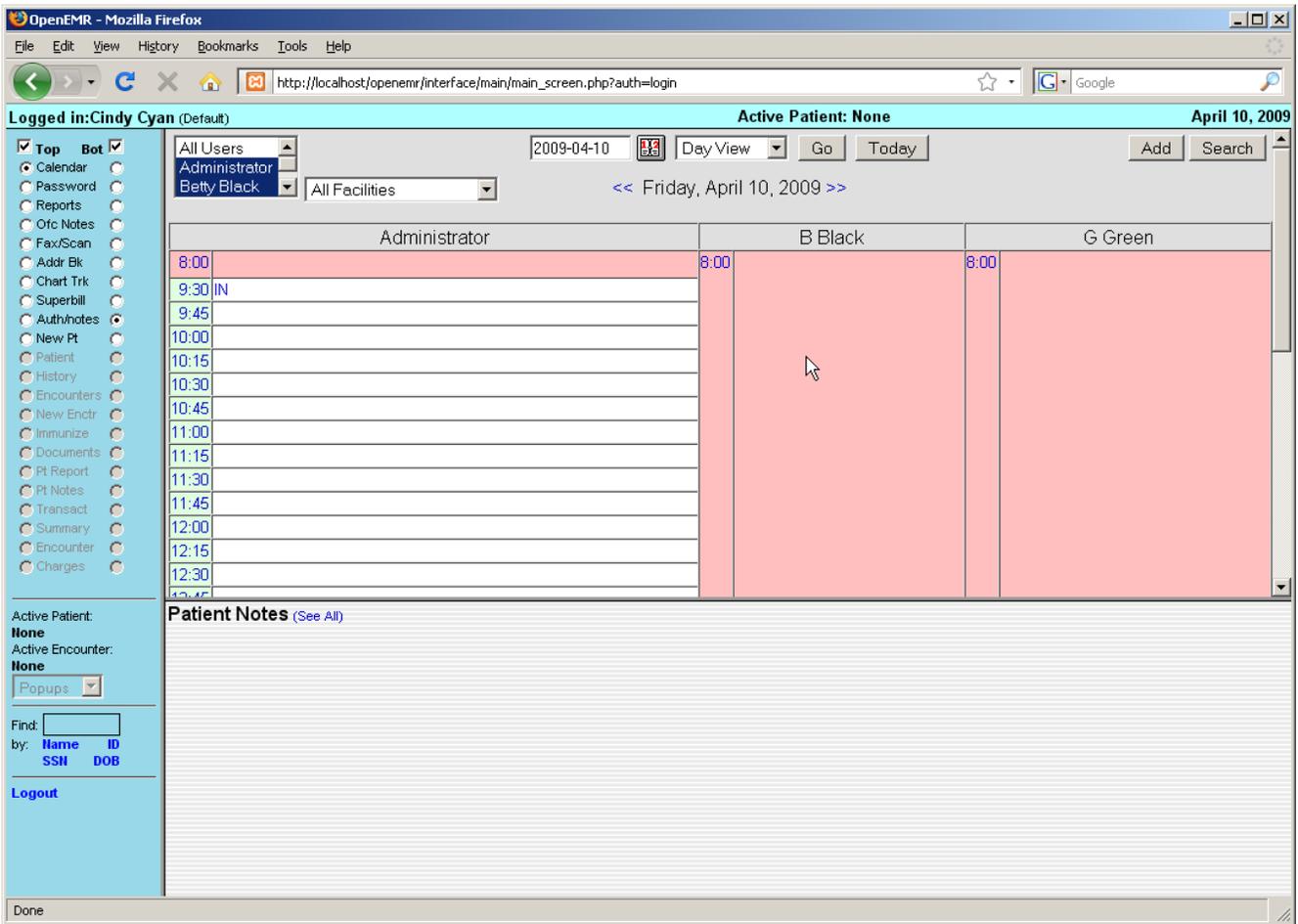


### Setting Up Schedules

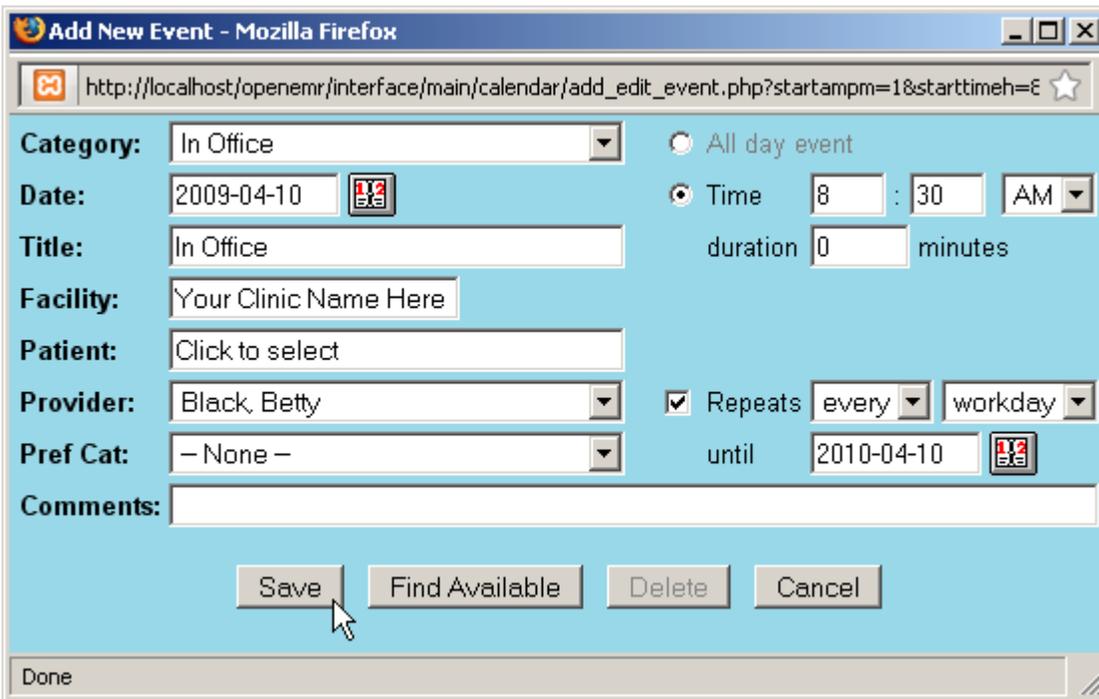
Login to OpenEMR using your assigned username and password.

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

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 IN	9:30	9:15
9:45	9:45	9:30
10:00	10:00	9:45
10:15	10:15	10:00
10:30	10:30	10:15
10:45	10:45	10:30
11:00	11:00	10:45
11:15	11:15	11:00 LUNCH
11:30	11:30	

Active Patient: None  
Active Encounter: None  
Popups

Find:   
by: Name ID  
SSH DOB

Logout

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. "rouk, 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 (Default), 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, Balance Due: \$0.00.
- 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.
- Choices:** 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.
- Employer:** Occupation: Engineer, Employer Name: NW Company.

On the right side of the "Who" 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, Password, Reports, etc. 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`.

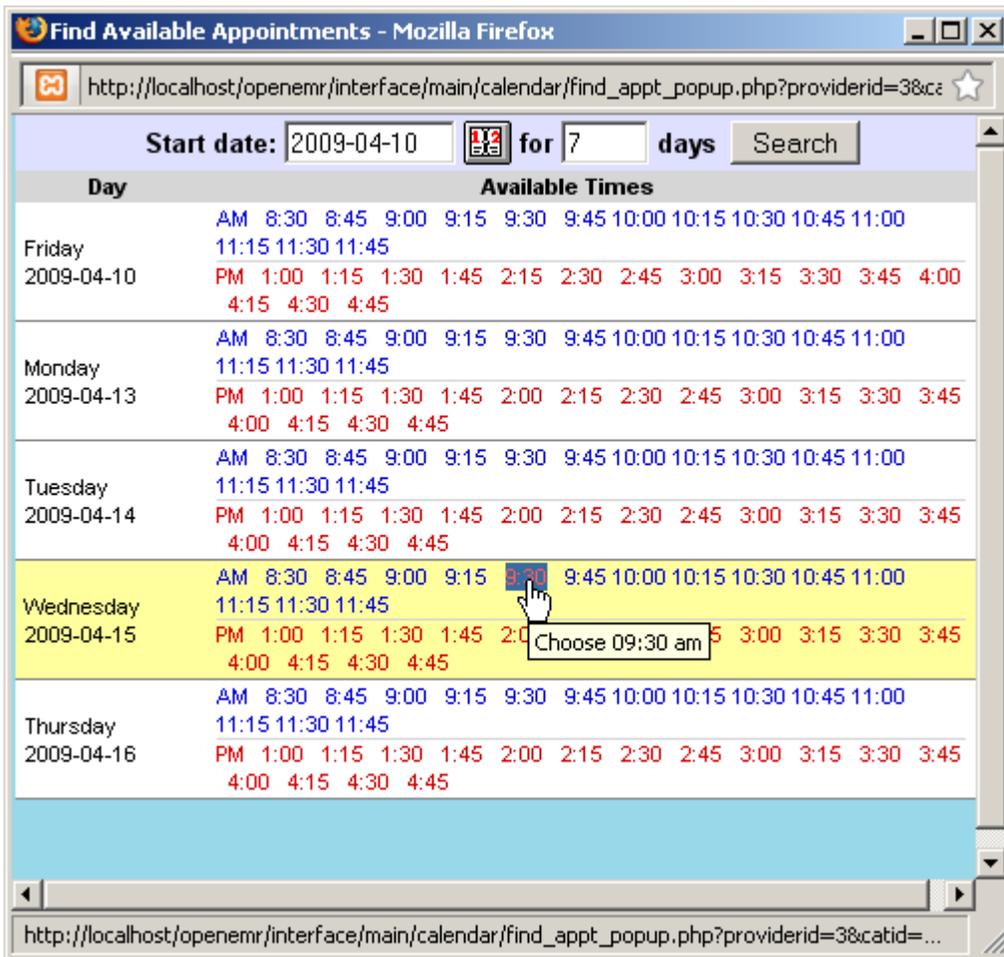
The form contains the following fields and options:

- 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

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 10, 2009

All Users Administrator Betty Black All Facilities 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 IN	9:30 Roark, Rod	9:15
9:45	9:45	9:30
10:00	10:00	9:45
10:15	10:15	10:00
10:30	10:30	10:15
10:45	10:45	10:30
11:00	11:00	10:45
11:15	11:15	11:00 LUNCH

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

Find: roark  
by: Name ID  
SSN DOB

Logout

Notes (More)

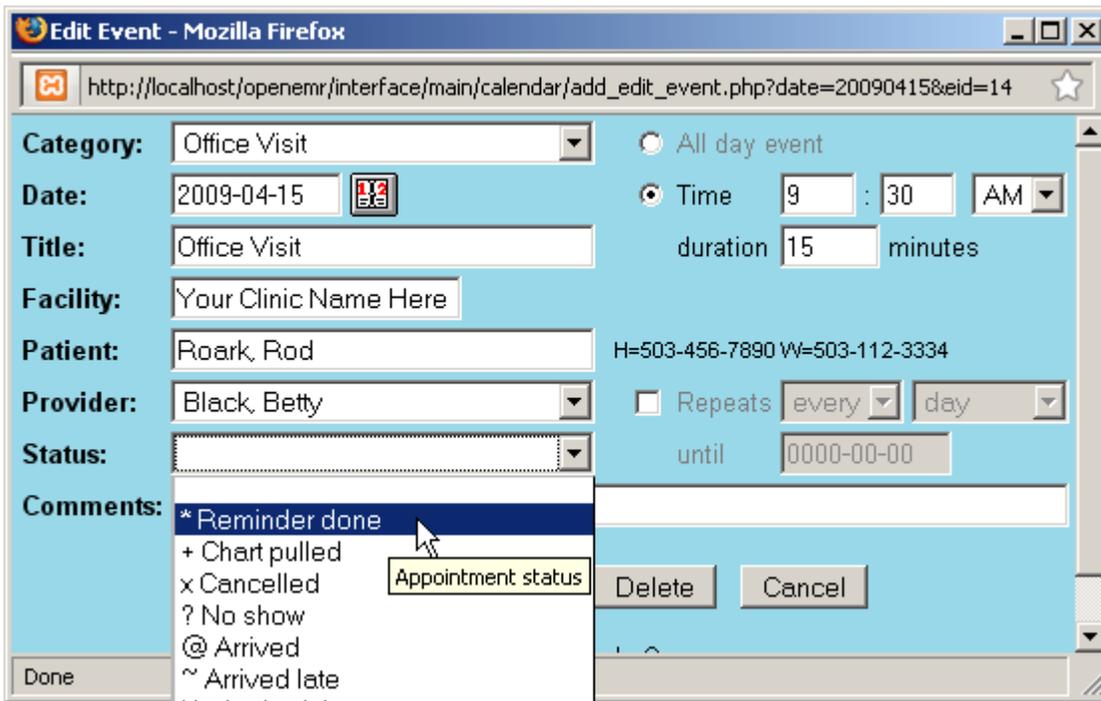
(Issues not authorized)

javascript:goPid(1)

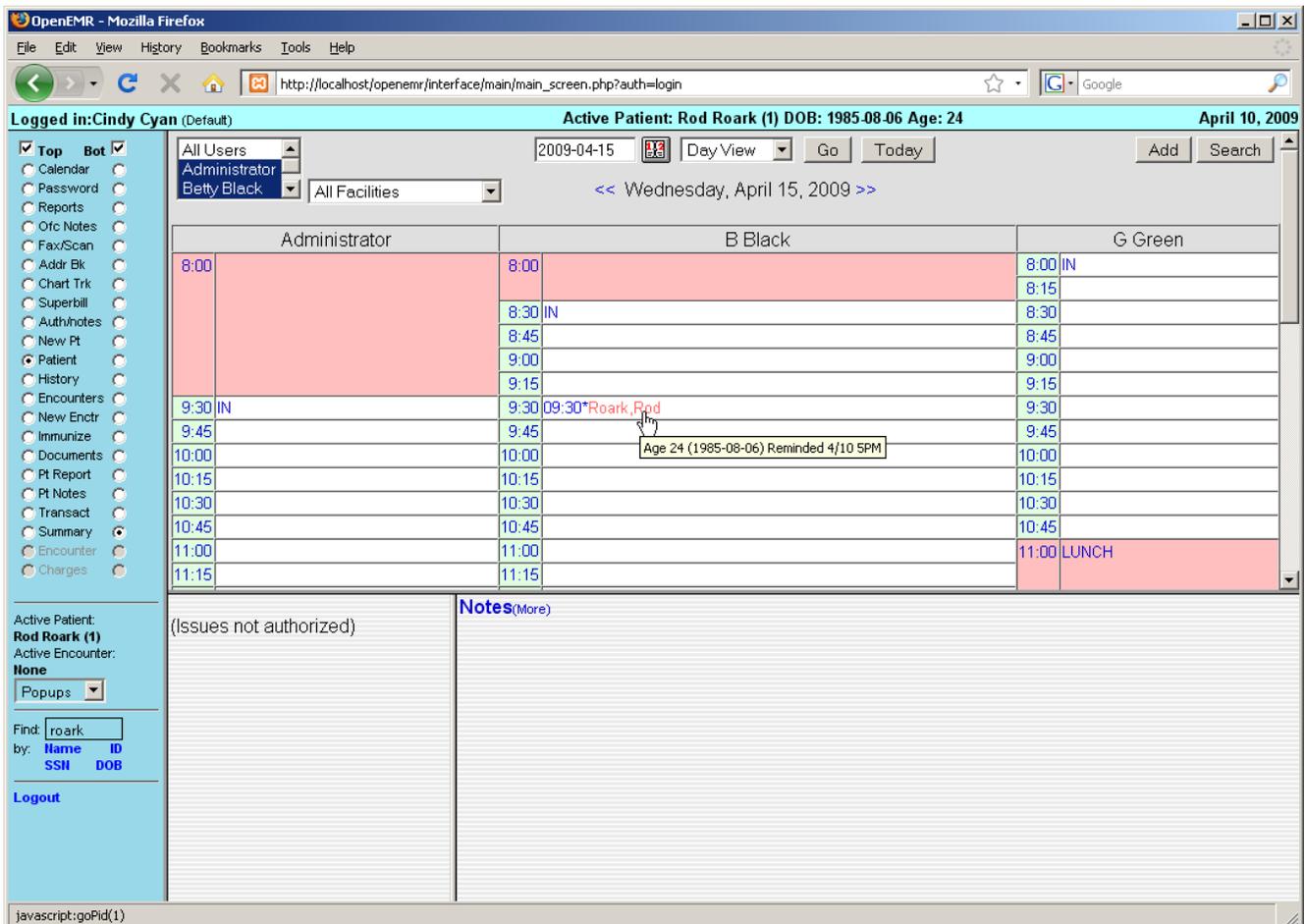
## Appointment Status

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.



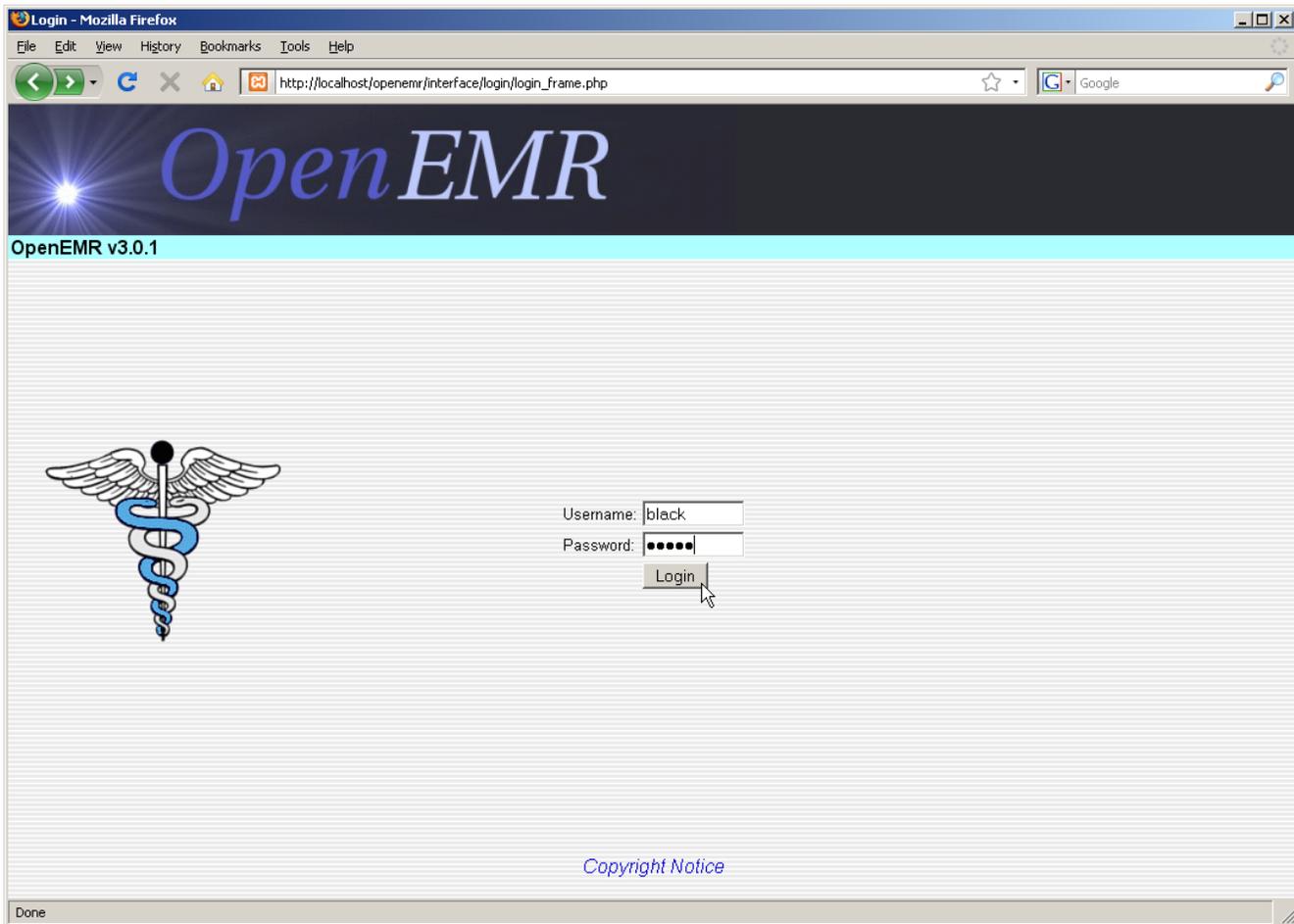
You can also type a note into the 'Comments' line if more information is needed. Click 'Save' to update the status of the appointment.



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

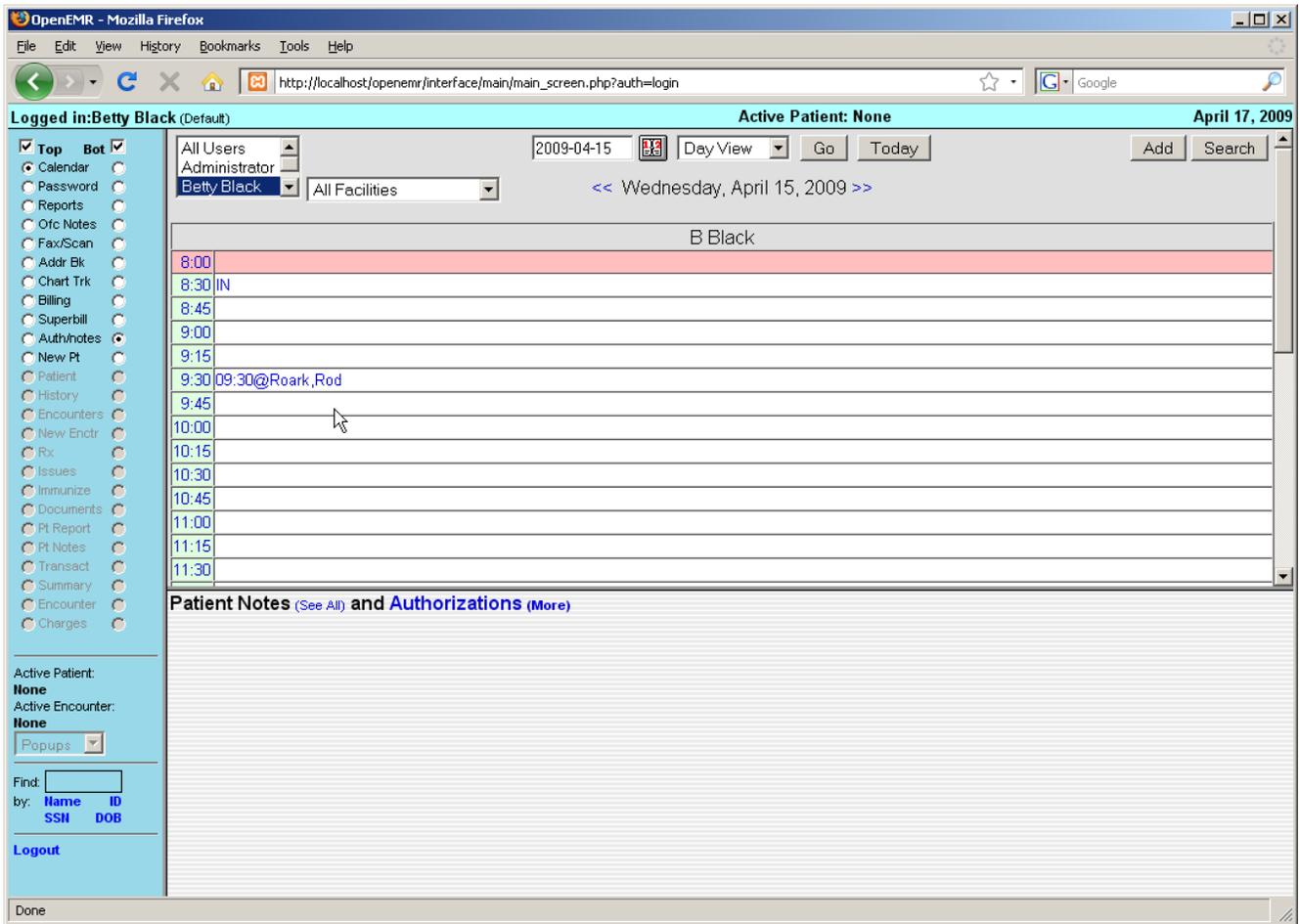
Patient encounters are handled primarily by a clinics providers.



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.



## Opening a New Encounter

To begin the encounter, click on the patient's 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 Balance Due: \$0.00  
 DOB: 1985-08-06 Sex: Male  
 S.S.: 111-22-3333 License/ID: 1234567

Upcoming Appointments  
 New Appointment **Friday, 2009-04-17**  
 9:30 am Office Visit  
 Betty Black

**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: NWW Company

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

**Immunizations (More)**

**Prescriptions**

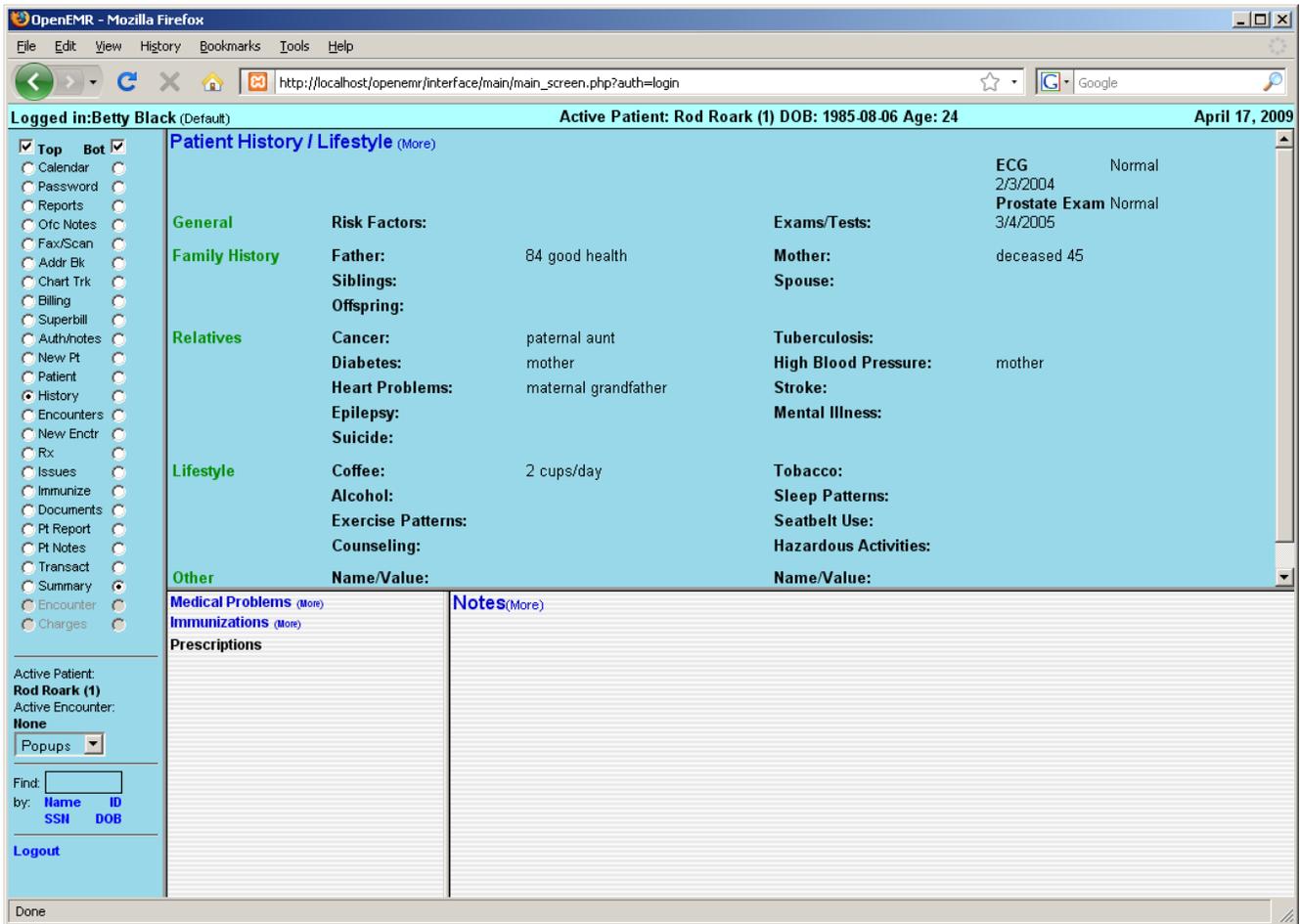
Active Patient: Rod Roark (1)  
 Active Encounter: None  
 Popups

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.



When you're done, select 'Encounters' from the navigation menu on the left. 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' 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

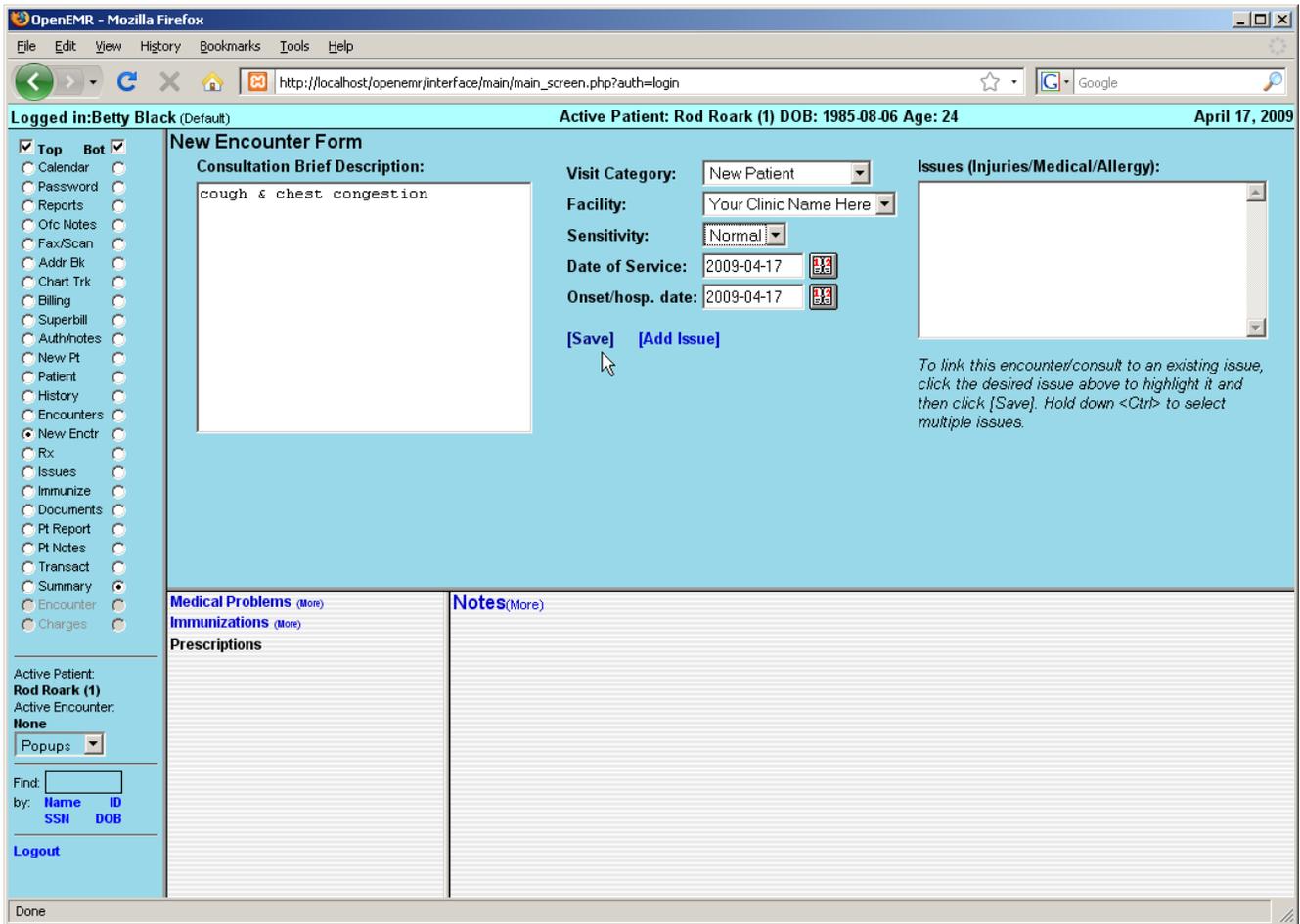
Find:   
by: [Name](#) [ID](#)  
[SSH](#) [DOB](#)

[Logout](#)

Done

Both methods will bring you to the New Encounter Form.

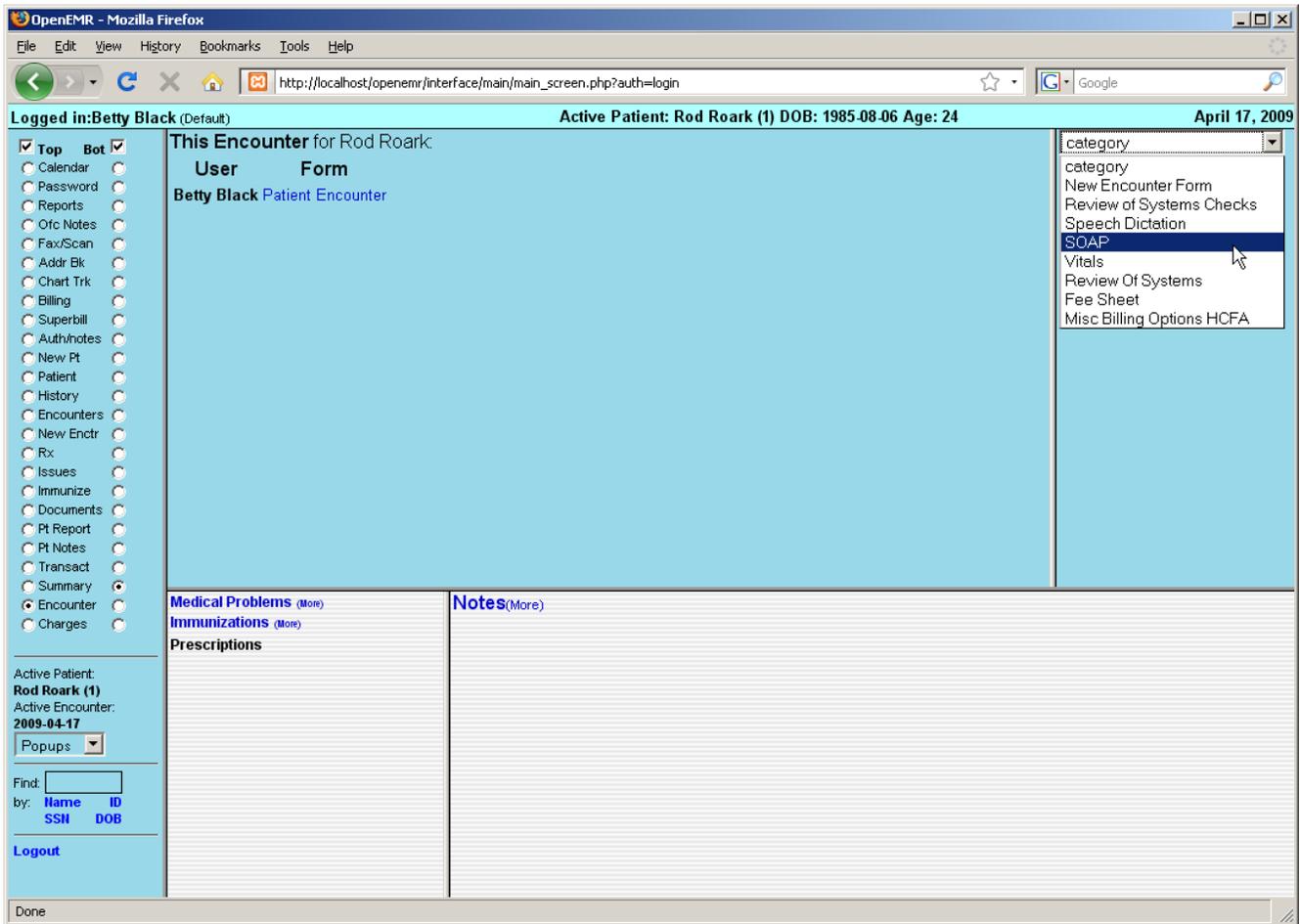
Here you can enter a brief description of the encounter and the date of service. Encounters for new patients will not have any Issues or Diagnoses associated with them at this time, so click 'Save' to continue with the encounter.



## 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.

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](#)

### SOAP

Subjective  
subjective description goes here

Objective  
clinical observations go here

Assessment  
doctor's assessment goes here

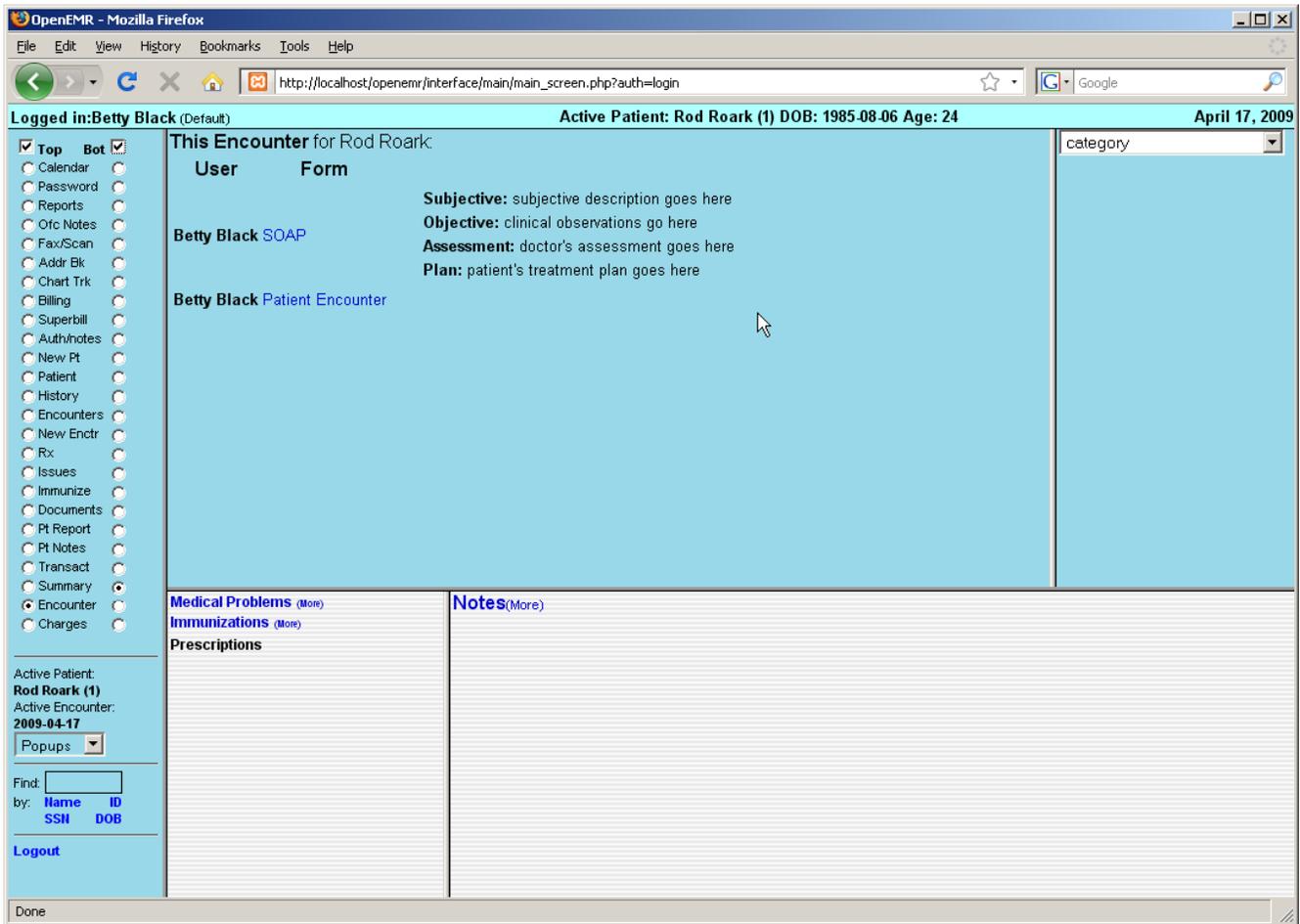
Plan  
patient's treatment plan goes here

Save Form [\[Don't Save\]](#)

Done

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

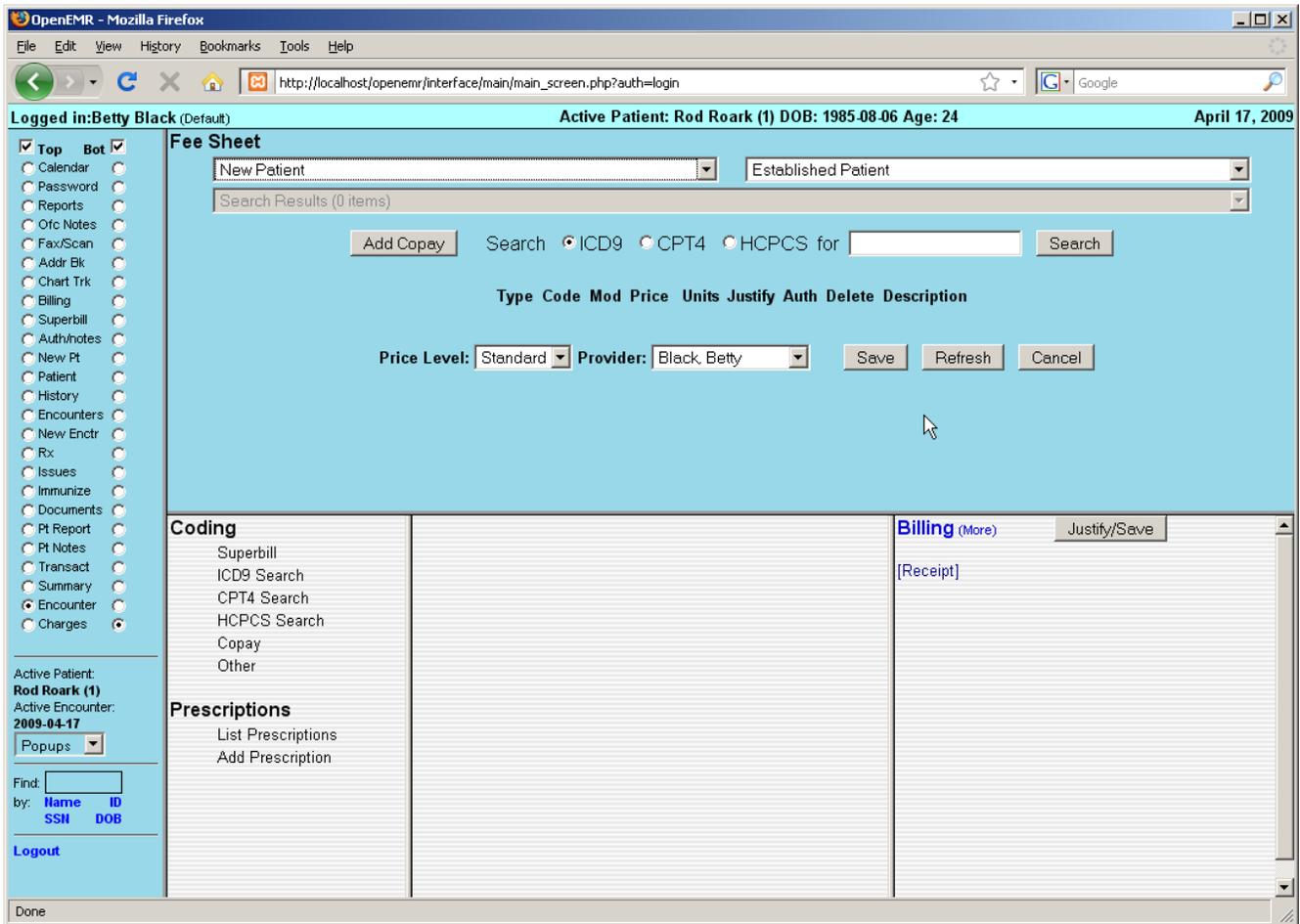
You'll see that the SOAP form has been added to the list of forms for this encounter. Also shown is a summary of its contents.



## Using the Fee Sheet

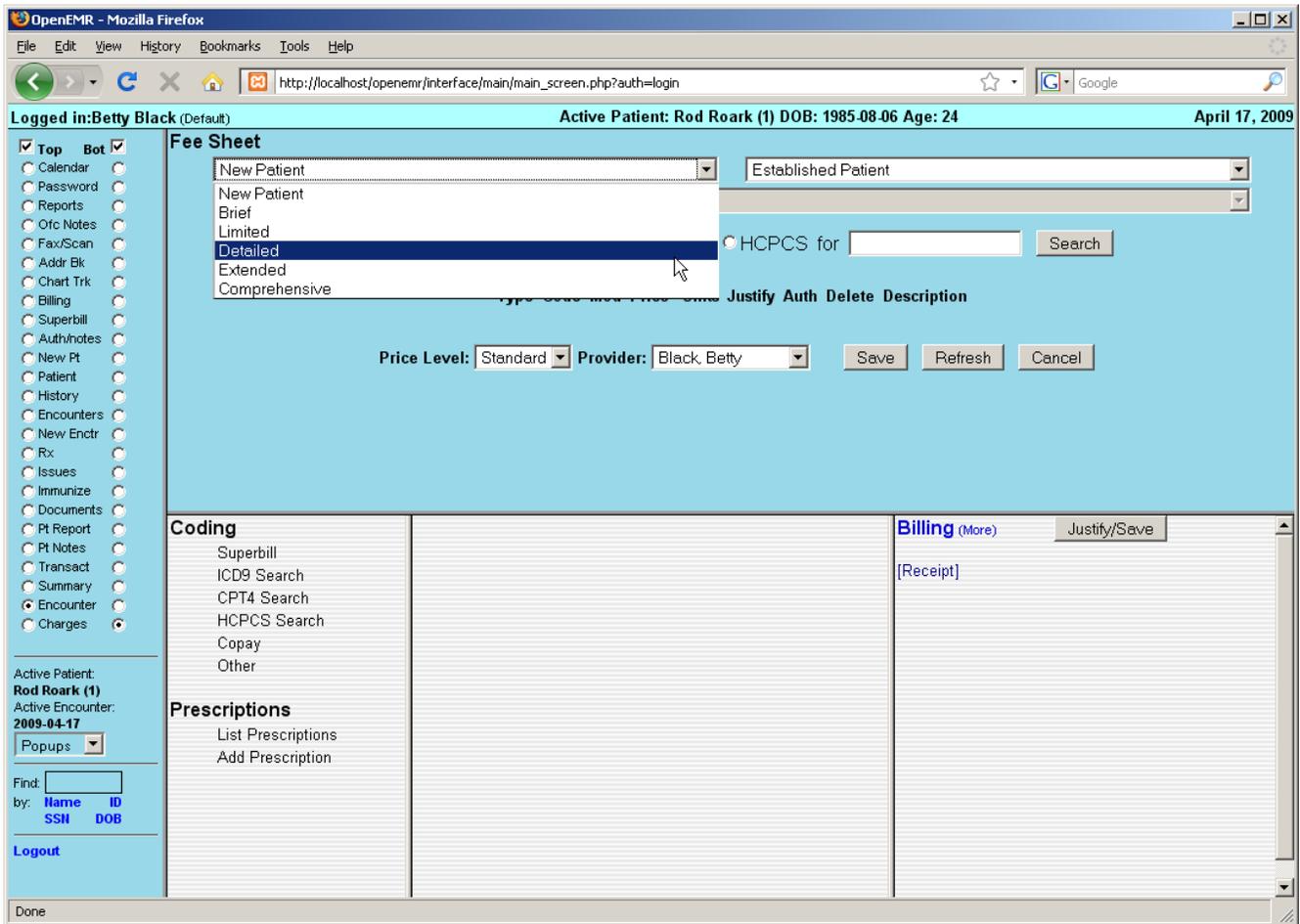
Next select the 'Fee Sheet' from the drop-down list. The Fee Sheet is different from most other forms in that it enters and modifies billing information that is stored elsewhere in the system; it is not really an encounter form, and when used it will not appear in the encounter's list of forms.

You can select 'Charges' 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

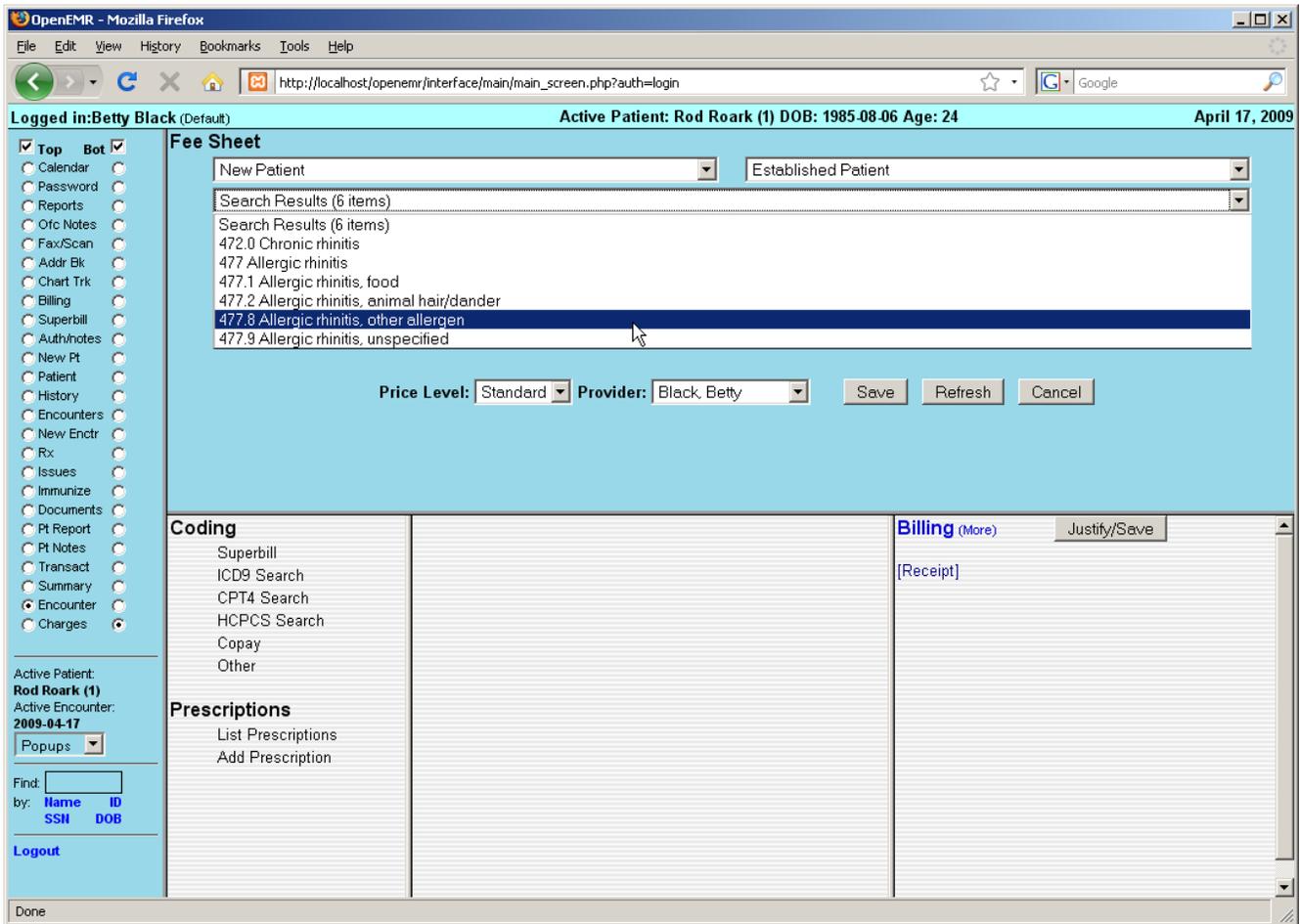
- List Prescriptions
- Add Prescription

### 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)

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	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 Save Refresh Cancel

### Coding

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

### Prescriptions

- List Prescriptions
- Add Prescription

### Billing (More)

Justify/Save

[Receipt]

Done

To see the Fee 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)			<a href="#">View encounter 1.23</a>

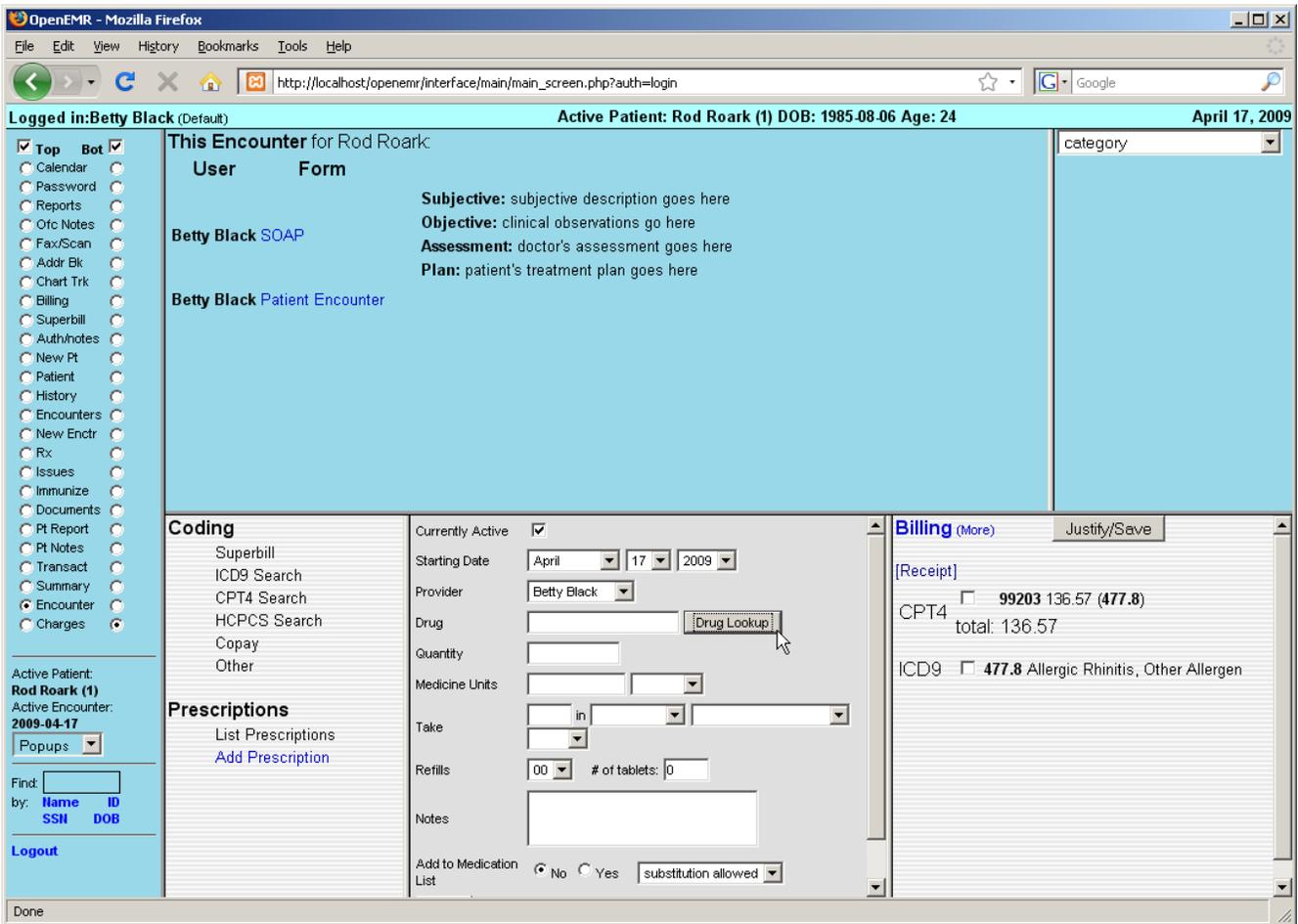
Done

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.

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.

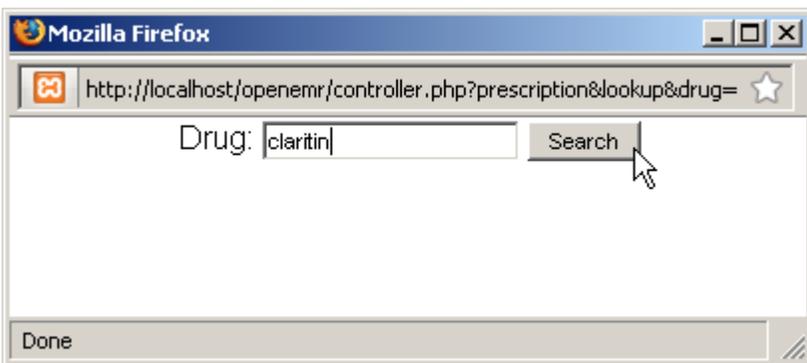
## Adding Prescriptions

To prescribe medication for this patient, click 'Add Prescription' on the left of the Charges page.

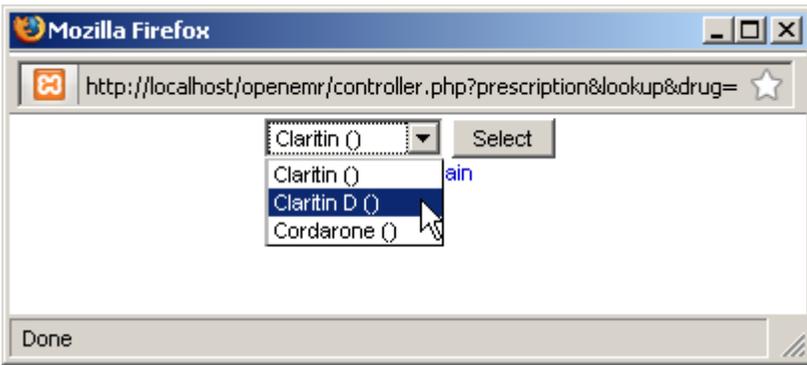


This presents you with a form for entering prescription data, including dosage, refills, and whether or not generic over-the-counter substitutions are allowed for this patient.

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.

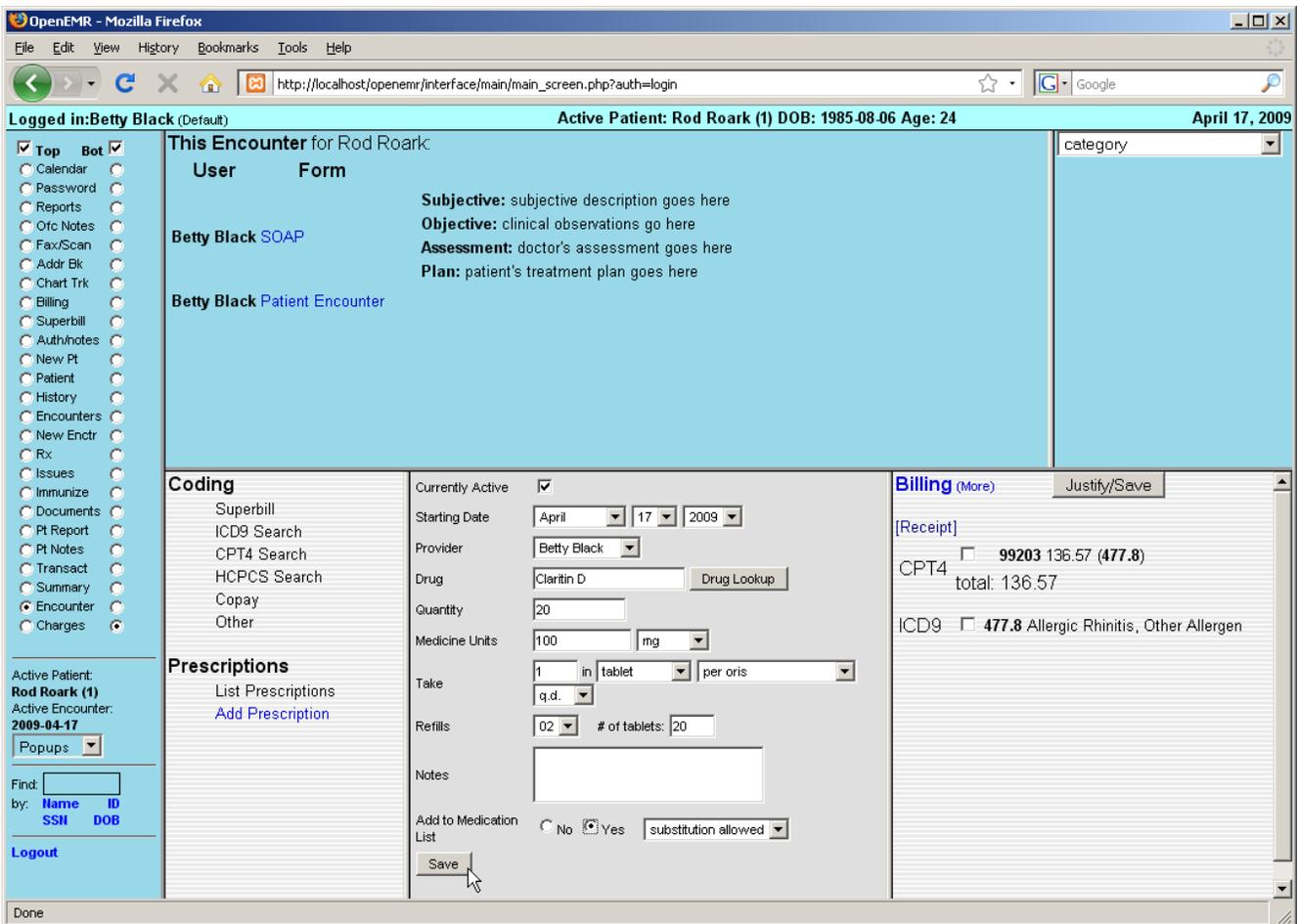


Clicking 'Search' displays a drop-down list of possible medications generated by connecting to the web site [www.rxlist.com](http://www.rxlist.com).



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' 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 &amp; 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**

---

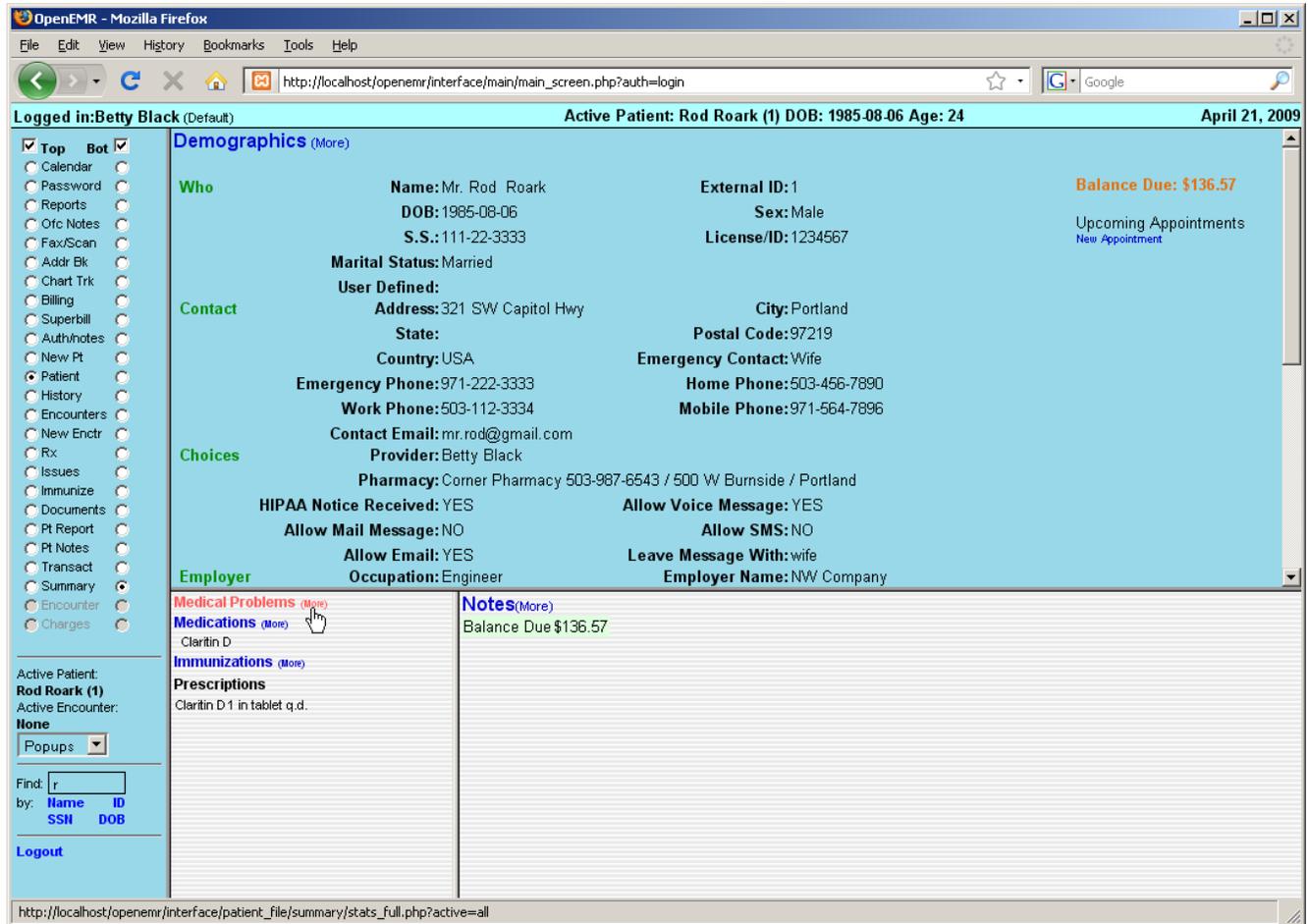
Signature: \_\_\_\_\_  
Date: 2009-04-17

# 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 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 to **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
<b>Medications</b>								
	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.

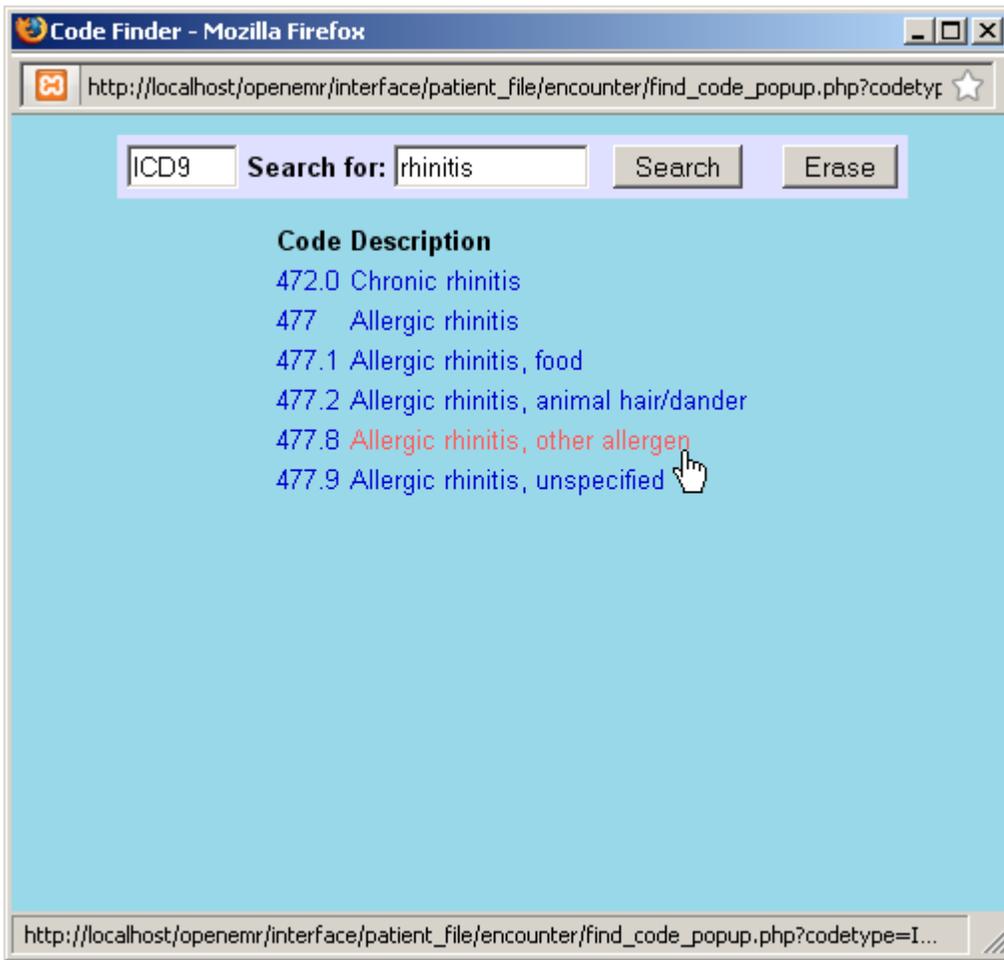
Enter the appropriate beginning and end dates, and select the 'Occurrence' from the drop-down list provided.

The screenshot shows a web browser window with the following form elements:

- Type:** Radio buttons for Problem (selected), Allergy, Medication, Surgery, and Dental.
- Dropdown:** A list containing HTN, asthma, diabetes, and hyperlipidemia, with a note "(Select one of these, or type your own title)".
- Title:** Text input field containing "bronchitis".
- Begin Date:** Text input field containing "2009-04-17" with a calendar icon.
- End Date:** Text input field with a calendar icon and the text "(leave blank if still active)".
- Diagnosis:** Empty text input field.
- Occurrence:** Dropdown menu with "Chronic/Recurrent" selected. A search dialog is open over this field, listing: "Unknown or N/A", "First", "Early Recurrence (<2 Mo)", "Late Recurrence (2-12 Mo)", "Delayed Recurrence (> 12 Mo)", "Chronic/Recurrent" (highlighted), and "Acute on Chronic". An "ancel" button is visible at the bottom right of the dialog.
- Referred by:** Empty text input field.
- Outcome:** Radio buttons for "us quo", "Worse", and "Pending followup".
- Destination:** Empty text input field.

The browser's status bar at the bottom shows "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  
 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
<b>Allergies</b>								
	penicillin	2009-01-01			Unknown or N/A			0
<b>Medical Problems</b>								
	bronchitis	2009-04-17		ICD9:477.8 (Allergic rhinitis, other allergen)	Chronic/Recurrent			0
<b>Medications</b>								
	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: r  
 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			

Save Add Issue Cancel

**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

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  
 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  
 Employer Occupation: Engineer Employer Name: NW Company

**Employer**

Type	Title	Begin	End	Diag	Occurrence	Referred By	Comments	Enc
<b>Allergies</b>								
	penicillin	2009-01-01			Unknown or N/A			0
<b>Medical Problems</b>								
	bronchitis	2009-04-17		ICD9:477.8 (Allergic rhinitis, other allergen)	Chronic/Recurrent			1
<b>Medications</b>								
	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: r  
 by: Name ID  
 SSH DOB  
 Logout

Done

## Immunizations

Click 'Summary' on the left 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

**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  
 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  
 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 v	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)

<b>Who</b>	<b>Name:</b> Mr. Rod Roark	<b>External ID:</b> 1	<b>Balance Due:</b> \$136.57
	<b>DOB:</b> 1985-08-06	<b>Sex:</b> Male	<a href="#">Upcoming Appointments</a>
	<b>S.S.:</b> 111-22-3333	<b>License/ID:</b> 1234567	<a href="#">New Appointment</a>
	<b>Marital Status:</b> Married		
	<b>User Defined:</b>		
<b>Contact</b>	<b>Address:</b> 321 SW Capitol Hwy	<b>City:</b> Portland	
	<b>State:</b>	<b>Postal Code:</b> 97219	
	<b>Country:</b> USA	<b>Emergency Contact:</b> Wife	
	<b>Emergency Phone:</b> 971-222-3333	<b>Home Phone:</b> 503-456-7890	
	<b>Work Phone:</b> 503-112-3334	<b>Mobile Phone:</b> 971-564-7896	
	<b>Contact Email:</b> mr.rod@gmail.com		
<b>Choices</b>	<b>Provider:</b> Betty Black		
	<b>Pharmacy:</b> Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland		
	<b>HIPAA Notice Received:</b> YES	<b>Allow Voice Message:</b> YES	
	<b>Allow Mail Message:</b> NO	<b>Allow SMS:</b> NO	
	<b>Allow Email:</b> YES	<b>Leave Message With:</b> wife	
<b>Employer</b>	<b>Occupation:</b> Engineer	<b>Employer Name:</b> NW Company	
	<b>Employer Address:</b> 44566 Industry Way	<b>City:</b> Portland	
	<b>State:</b> OR	<b>Postal Code:</b> 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 Mozilla Firefox. The browser address bar shows the URL: `http://localhost/openemr/interface/main/main_screen.php?auth=login`. The interface is logged in as Cindy Cyan (Default) with the active patient set to None. The date is April 21, 2009. The calendar view is set to Day View for 2009-04-21. The calendar grid shows three columns: Administrator, B Black, and G Green. The Administrator column has a red background from 8:00 to 11:15. The B Black column has a red background from 8:00 to 11:15. The G Green column has a red background from 11:00 to 11:15, labeled LUNCH. The search function in the bottom left corner is active, with the text 'roark' entered in the search box. The search criteria are set to Name, ID, SSR, and DOB. The JavaScript code `javascript:findPatient('Last');` is visible at the bottom of the page.

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
- 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](#)

[\[Help\]](#) 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

Notes (More)  
 Balance Due \$136.57

(Issues not authorized)

Done

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  
 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  
 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  
 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

**Contact**

**Choices**  
 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

**Notes (More)**  
 Balance Due \$136.57  
 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  
 Find: roark  
 by: Name ID  
 SSH DOB  
 Logout

The new note is now listed on the Summary page.

## Transactions

Click 'Transact' in the navigation menu to go to the Transactions page.

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

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  
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 (selected)  
Patient Request  
Physician Request  
Legal  
Billing

Referral

Referral Date: [ ] Refer By: Unassigned  
Refer To: Unassigned Reason: [ ]  
External Referral: Unassigned Referrer Diagnosis: [ ]  
Risk Level: Medium Include Vitals: Unassigned  
Requested Service: [ ]

Counter-Referral

[Save Transaction]

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

Done

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

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

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

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

- Who:** Name: Mr. Rod Roark, External ID: 1, Balance Due: \$136.57, Sex: Male, DOB: 1985-08-06, License/ID: 1234567, S.S.: 111-22-3333. There is a link for "Upcoming Appointments" and another for "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.
- Choices:** Contact Email: mr.rod@gmail.com, Provider: Betty Black, Pharmacy: Corner Pharmacy 503-987-6543 / 500 W Burnside / Portland.
- Other:** HIPAA Notice Received: YES, Allow Voice Message: YES.

Below the demographics is a "Transaction Type" dropdown menu set to "Physician Request". A "Details:" text box contains the text "request pre-authorization for air filtration system in patient home." with a cursor. A "[Save Transaction]" button is located below the text box.

On the left side, there is a navigation menu with various options like Calendar, Password, Admin, Reports, etc. At the bottom left, there is a search bar with "roark" entered and a "Logout" link.

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  
 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

**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

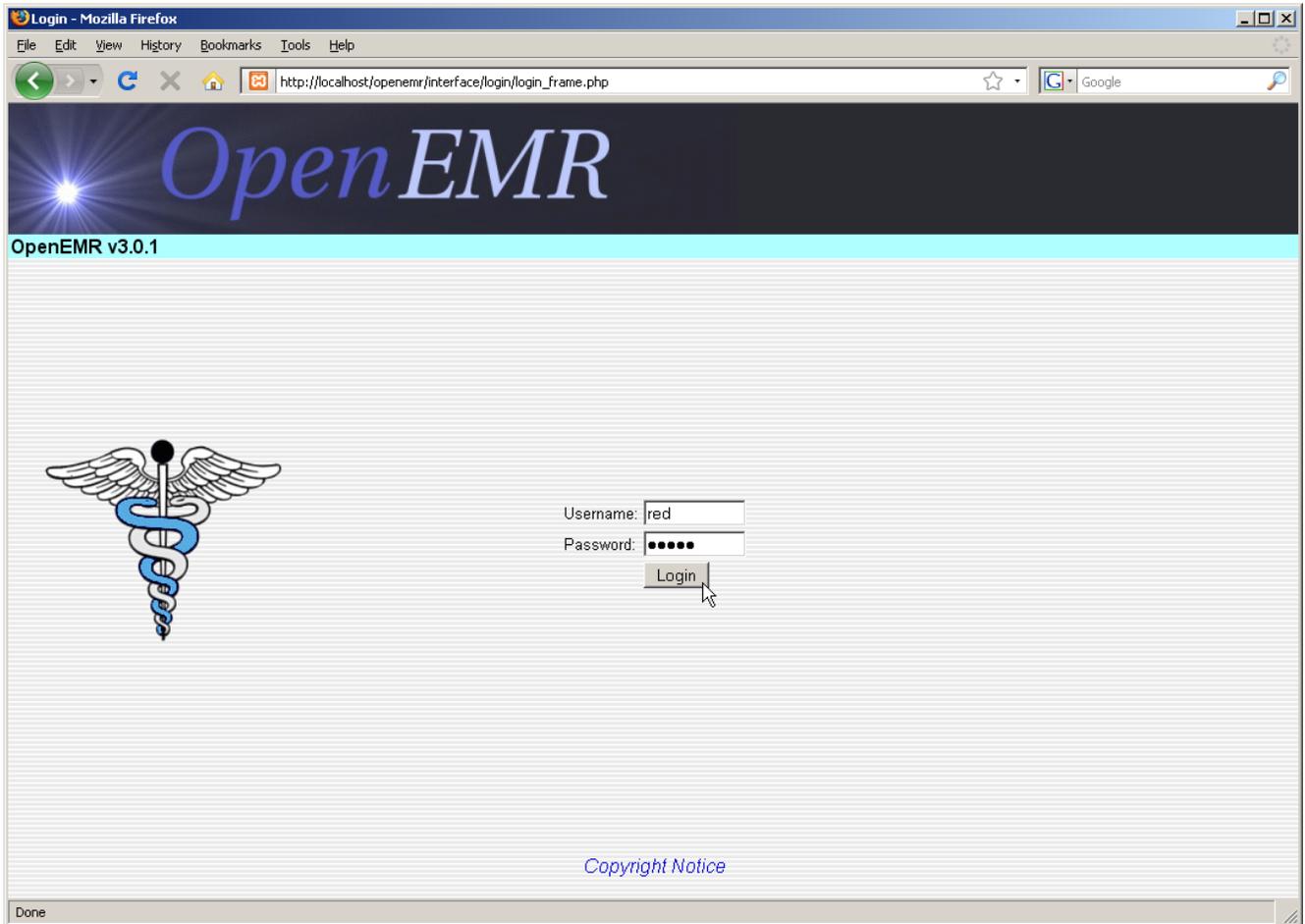
Logout

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

Active Patient: None  
Active Encounter: None  
Popups

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

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		9:30	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

Patient Notes (See All)

Done

Select 'Billing' from the navigation menu on the left. 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 interface in a Mozilla Firefox browser. The browser's address bar displays 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 features a search interface with 'From' and 'To' date pickers, both set to '2009-04-21'. There are checkboxes for 'Show Unbilled Only' (checked) and 'Show Authorized Only' (unchecked). Action links include '[View Printable Report]', '[Reports]', '[EOBs]', '[View Log]', and '[Select All]'. Below the search area are buttons for 'Generate X12', 'Generate HCFA', 'Mark as Cleared', and 'Re-Open', along with 'HCFA Margins: Left: 24 Top: 27'. A left sidebar contains a navigation menu with 'Billing' selected. At the bottom left, there are fields for 'Active Patient: None', 'Active Encounter: None', a 'Popups' dropdown, a 'Find:' search box, and a 'Logout' link.

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 H

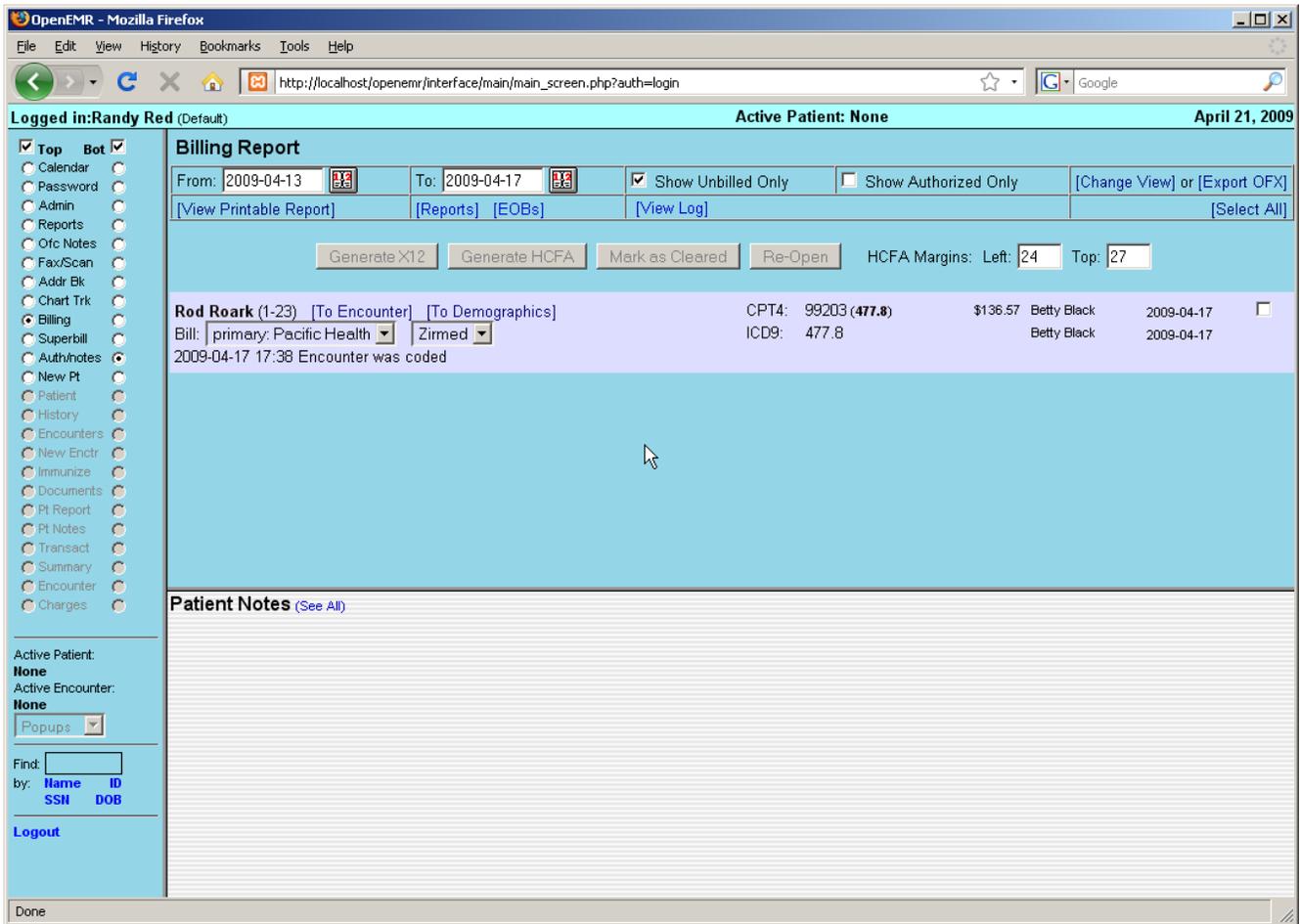
April, 2009						
Today						
wk	Sun	Mon	Tue	Wed	Thu	Fri
13				1	2	3
14	5	6	7	8	9	10
15	12	13	14	15	16	17
16	19	20	21	22	23	24
17	26	27	28	29	30	

HCFA Margins: Left: 24 Top: 27

### Patient Notes (See All)

Done

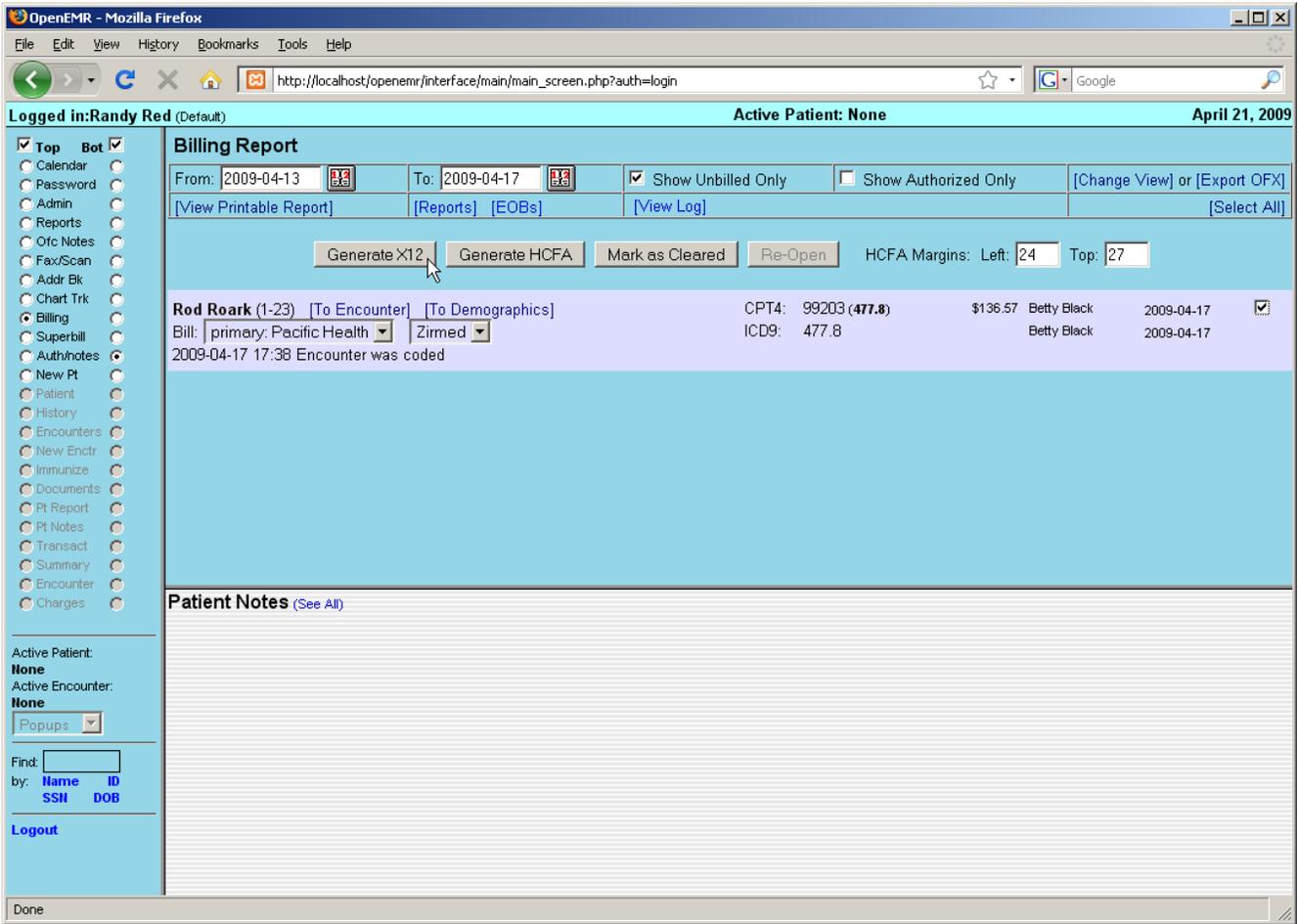
The list should now display all billables from the selected date range.



## 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.

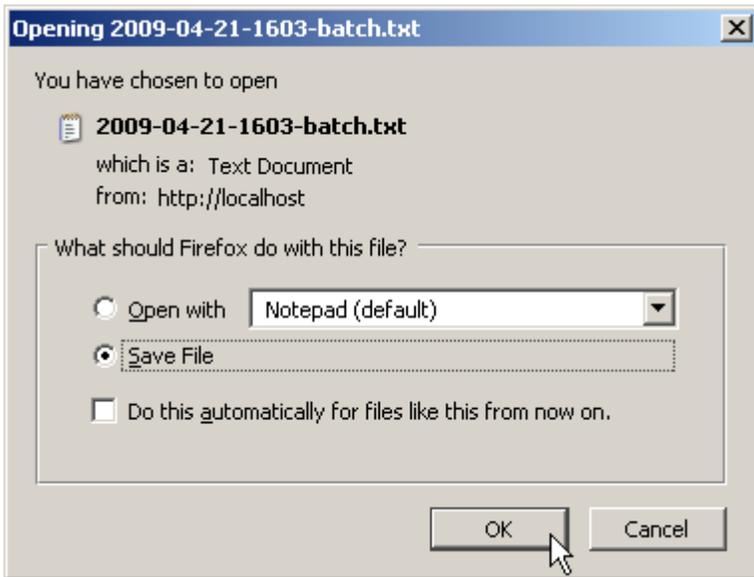


OpenEMR will present you with a confirmation popup, reminding you to check the log file after you have finished generating your claims.

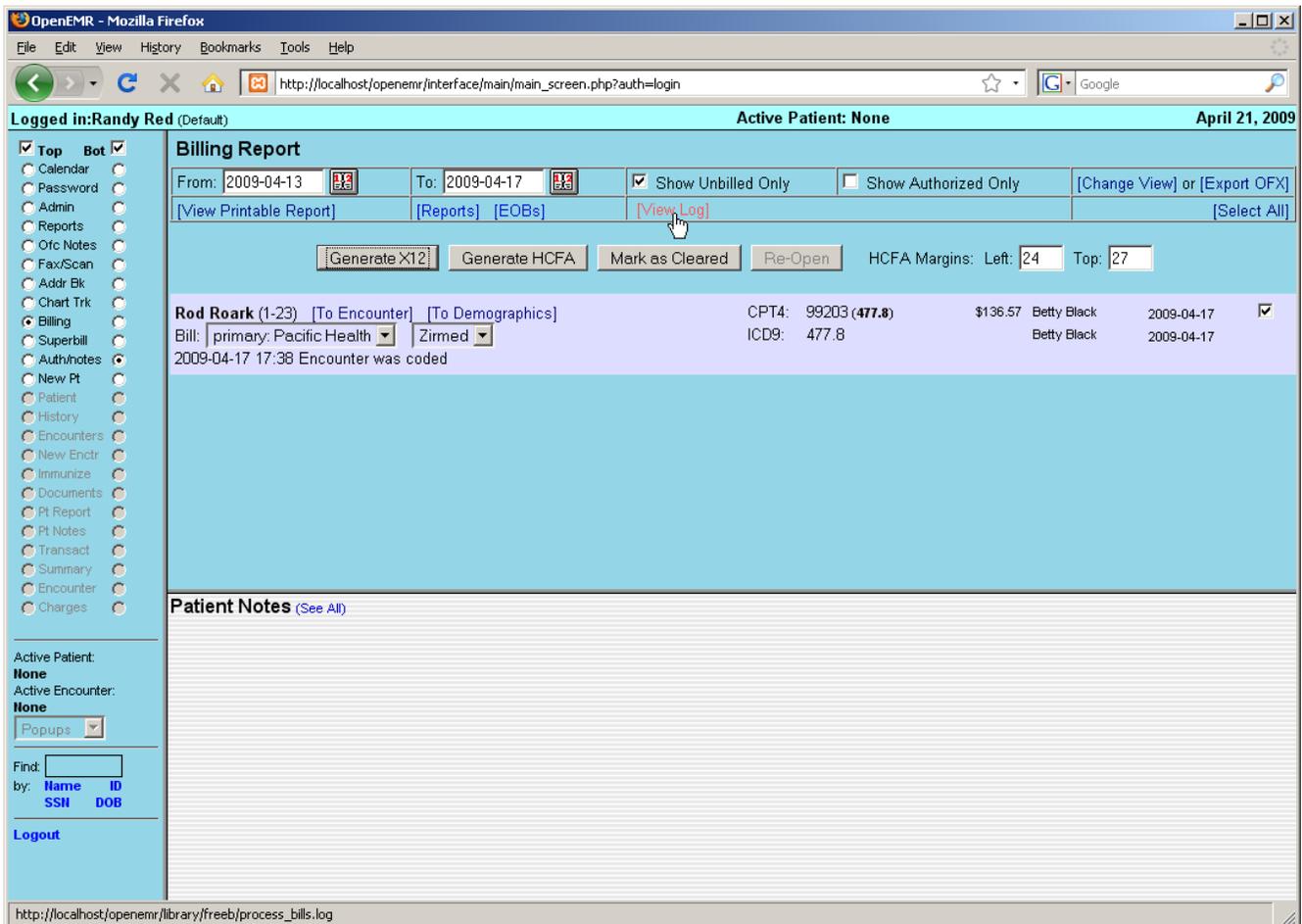
Click 'OK' to proceed.



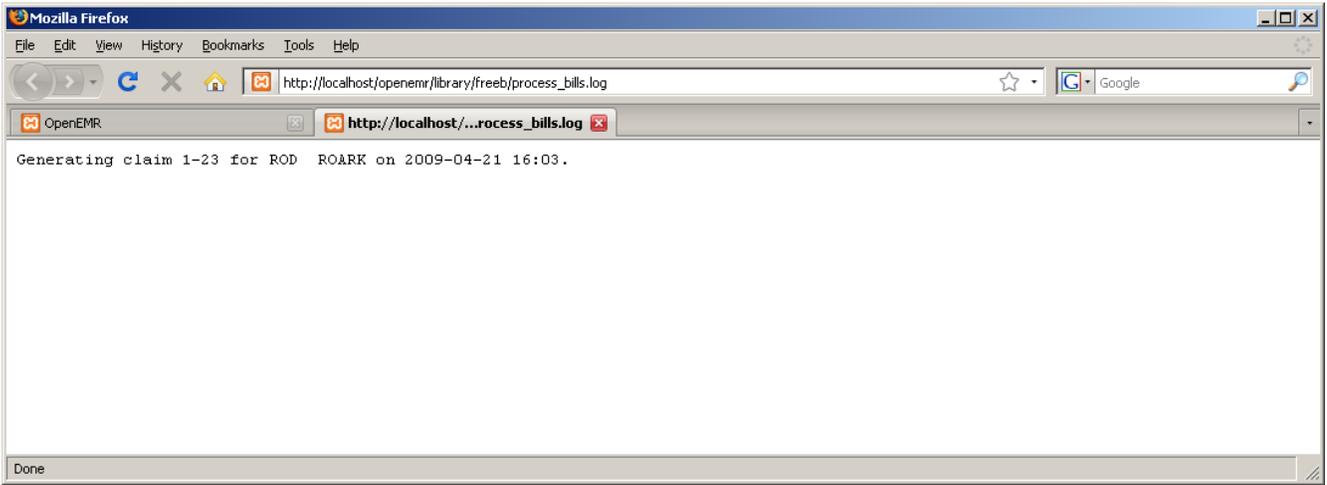
The standard Save File dialog should appear, allowing you to save the generated batch file to your computer.



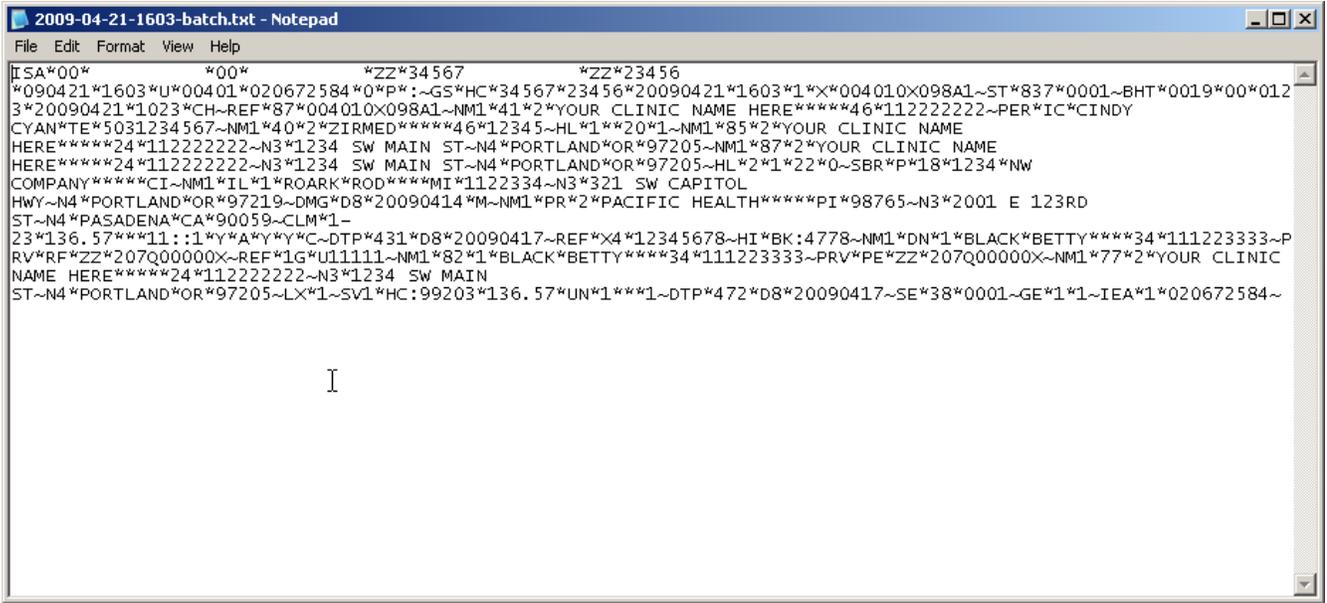
Once the file has been saved, click 'View Log' to check whether the claims were generated successfully.



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.



The downloaded claim file should contain the necessary encounter information, formatted for billing. This is what will be sent to the clearinghouse, by whatever method has been specified.



Uncheck 'Show Unbilled Only' and click 'Change View' to refresh the billing list and see the updated status of the encounter.

Click 'Mark as Cleared' to indicate that billing has been completed for this encounter.

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

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

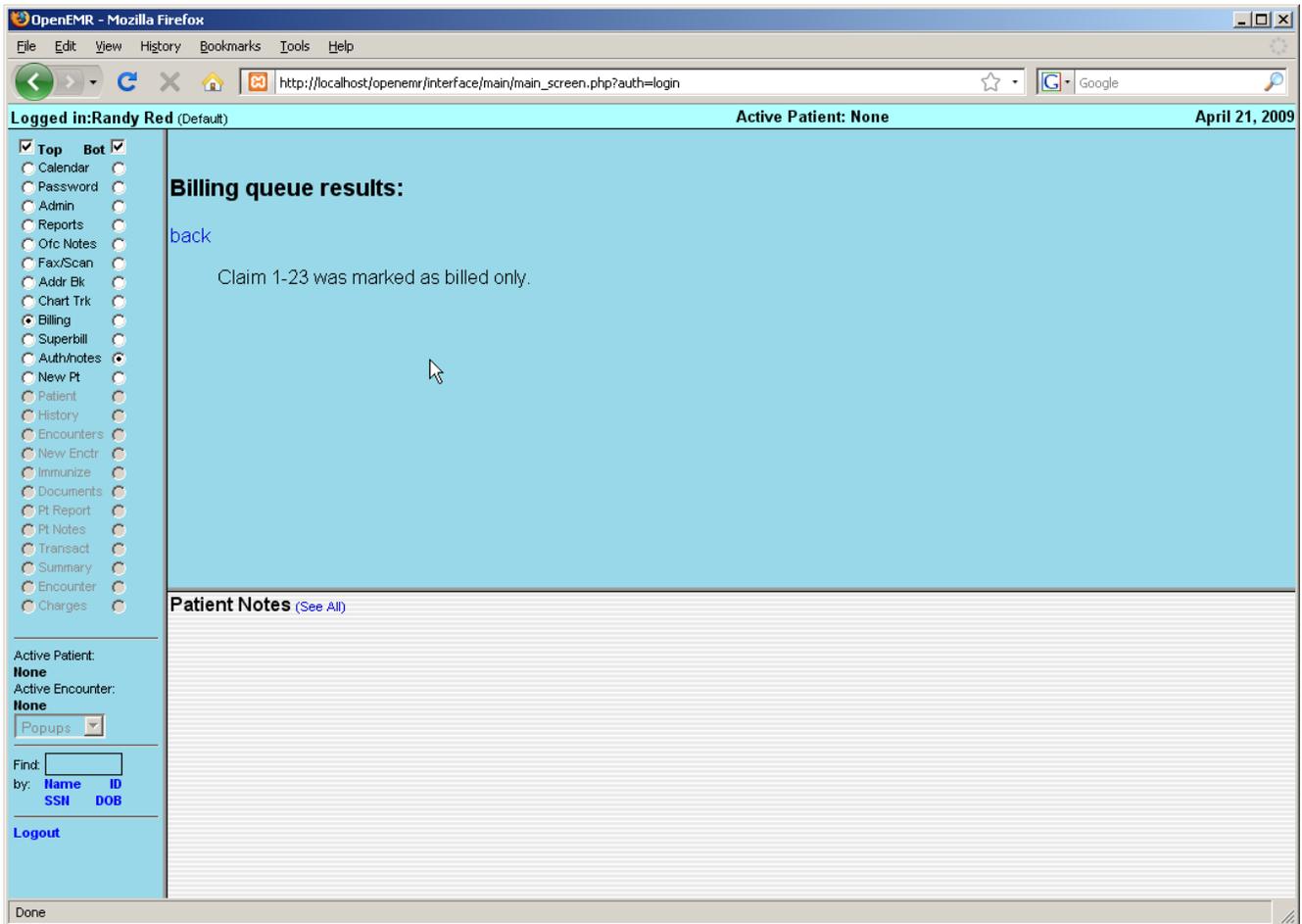
2009-04-17 17:38 Encounter was coded  
 2009-04-21 16:03 Queued for primary standard billing to Pacific Health  
 2009-04-21 16:03 Claim was generated to file 2009-04-21-1603-batch.txt

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

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

<b>Rod Roark</b> (1-23) <a href="#">[To Encounter]</a> <a href="#">[To Demographics]</a>	CPT4: 99203 (477.8)	\$136.57	Betty Black	2009-04-17	<input checked="" type="checkbox"/>
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

### 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

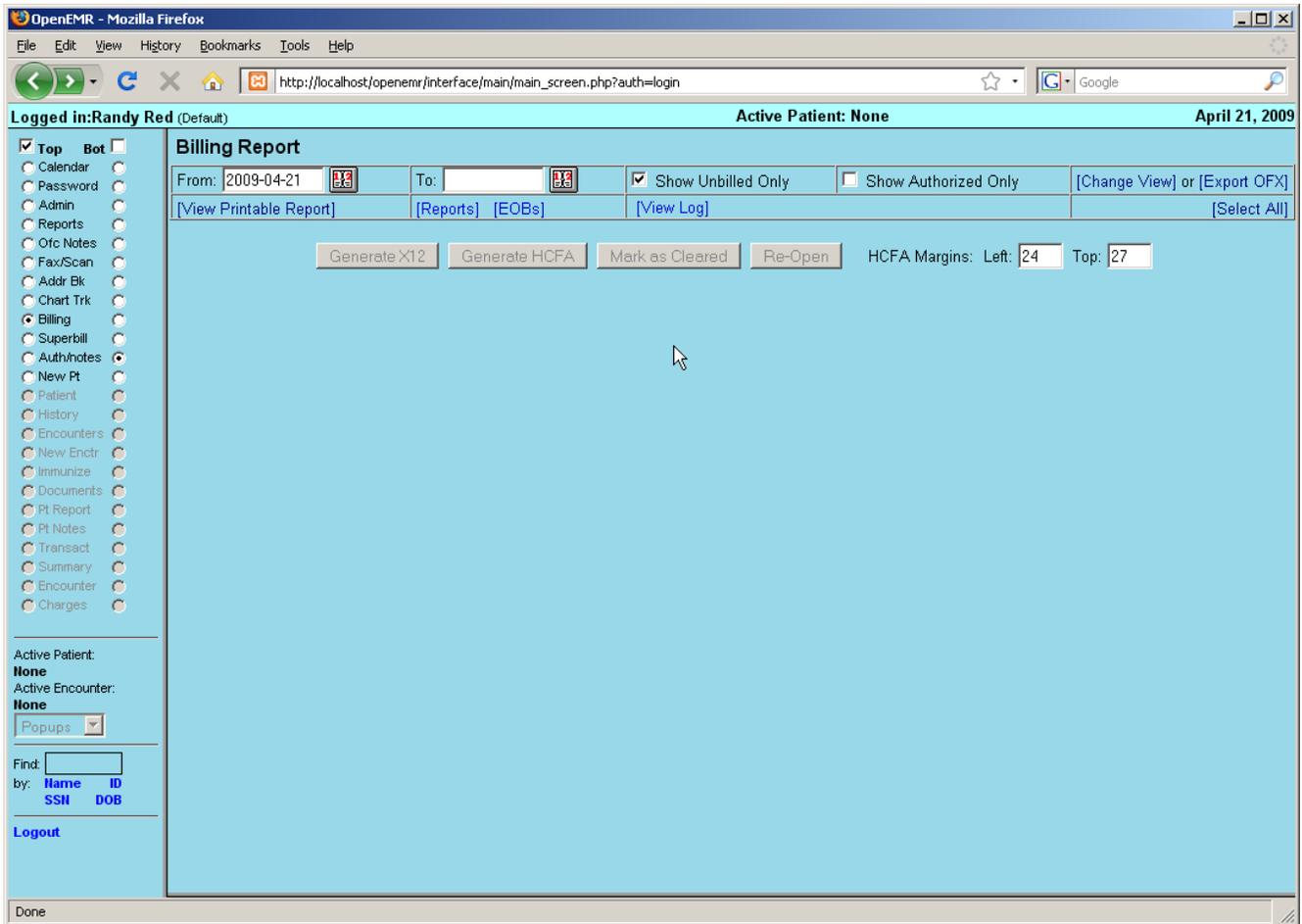
Bill: primary: Pacific Health  Zirmed  ICD9: 477.8 Betty Black 2009-04-17

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

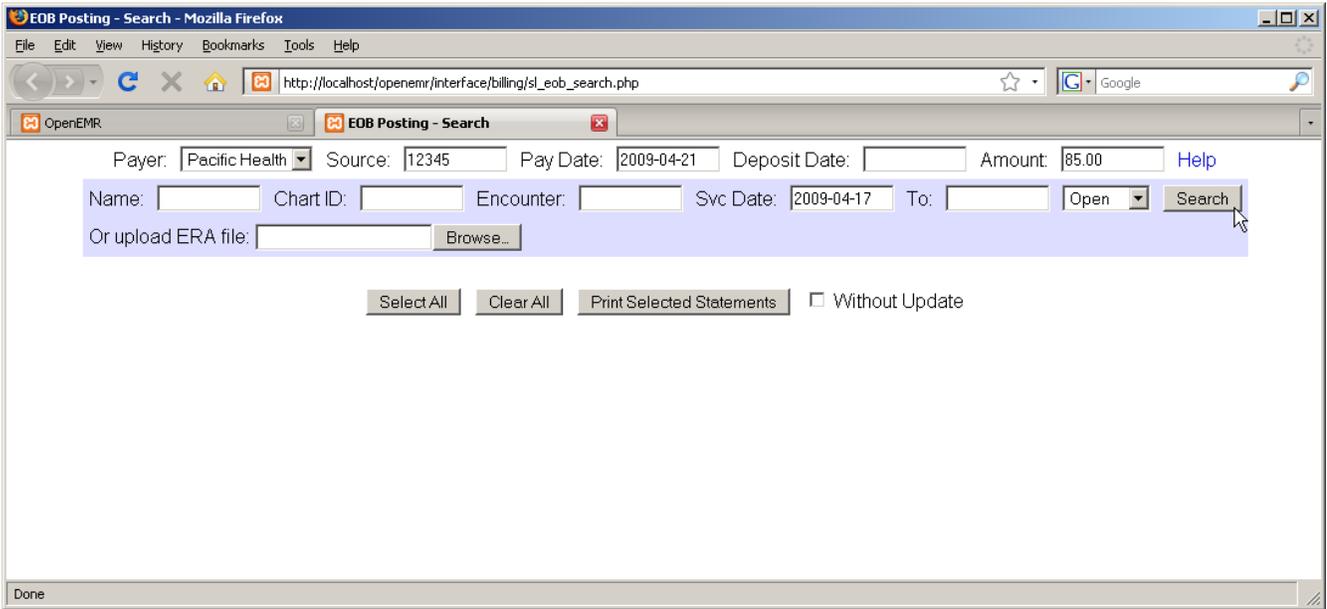
Users classified as Accounting or Administrator are also authorized to enter receivables for the clinic. Checks received from insurance companies can be entered here and distributed to cover the appropriate encounters. Patients can also be billed, and their payments recorded.

### Explanation of Benefits

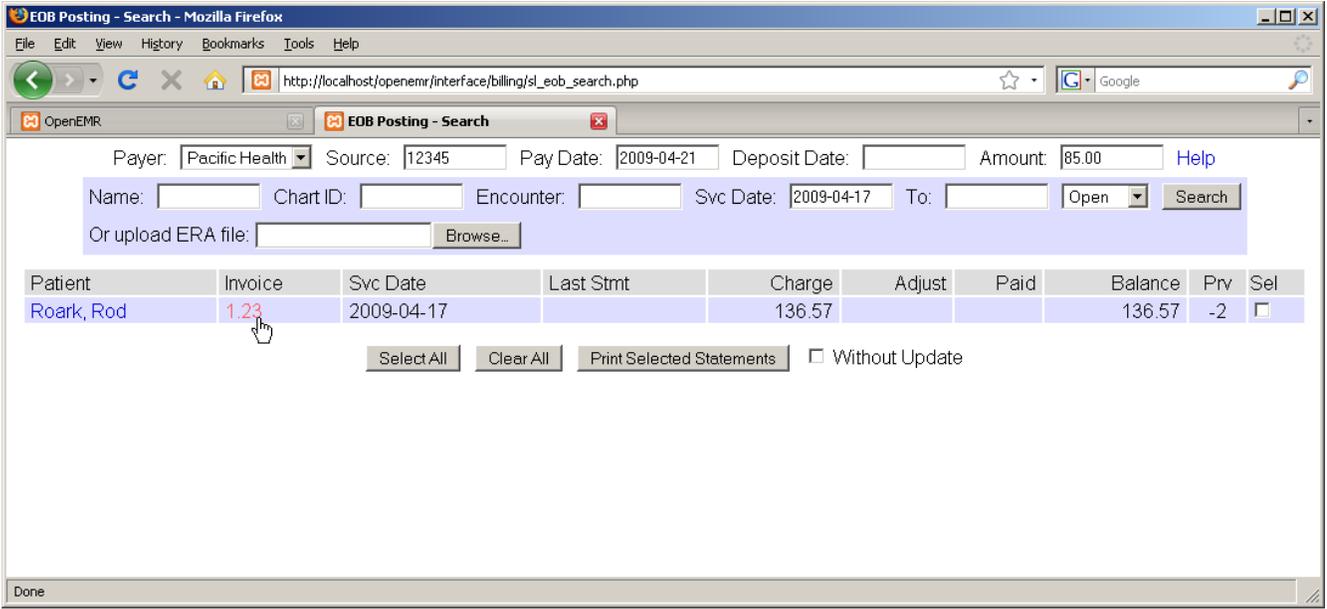


To begin, select 'Billing' from the navigation menu and click 'EOBs' to bring up the Explanation of Benefits Search window. This is where you can upload an ERA file (click 'Help' in the upper right-hand corner for more information) or begin inputting payments manually.

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.



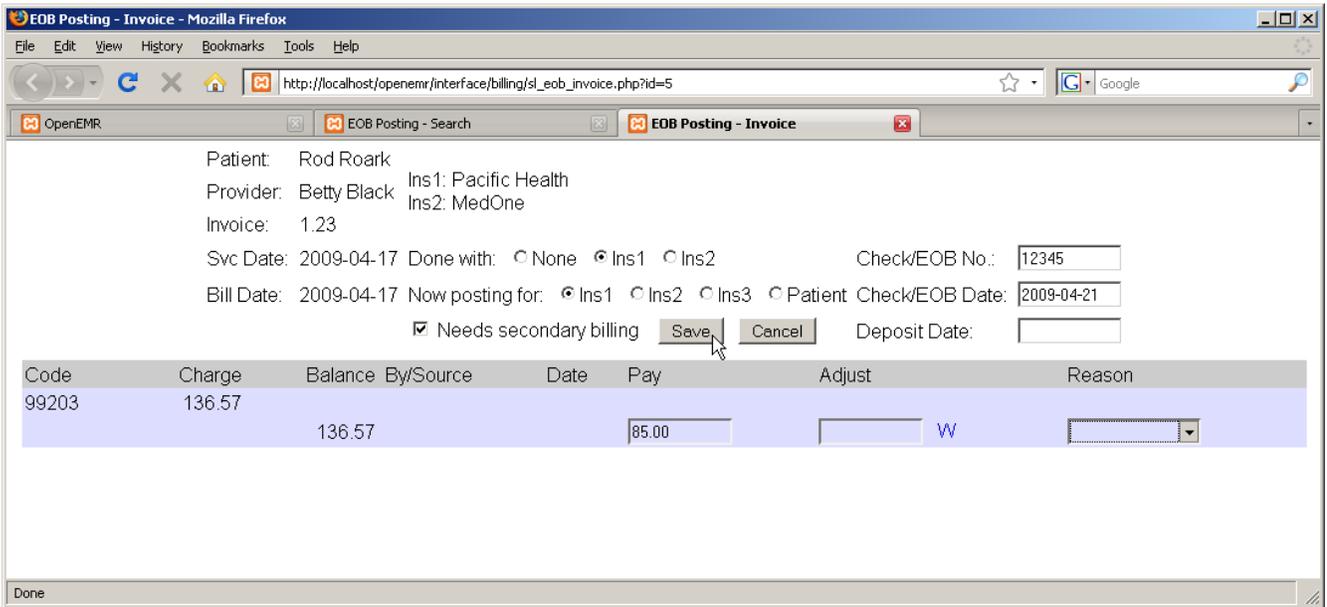
The search fields, with the blue background, are for locating a specific invoice (or invoices). Enter the appropriate parameters, such as the date of service, and click 'Search' to bring up a list of all invoices (claims) matching the requested parameters.



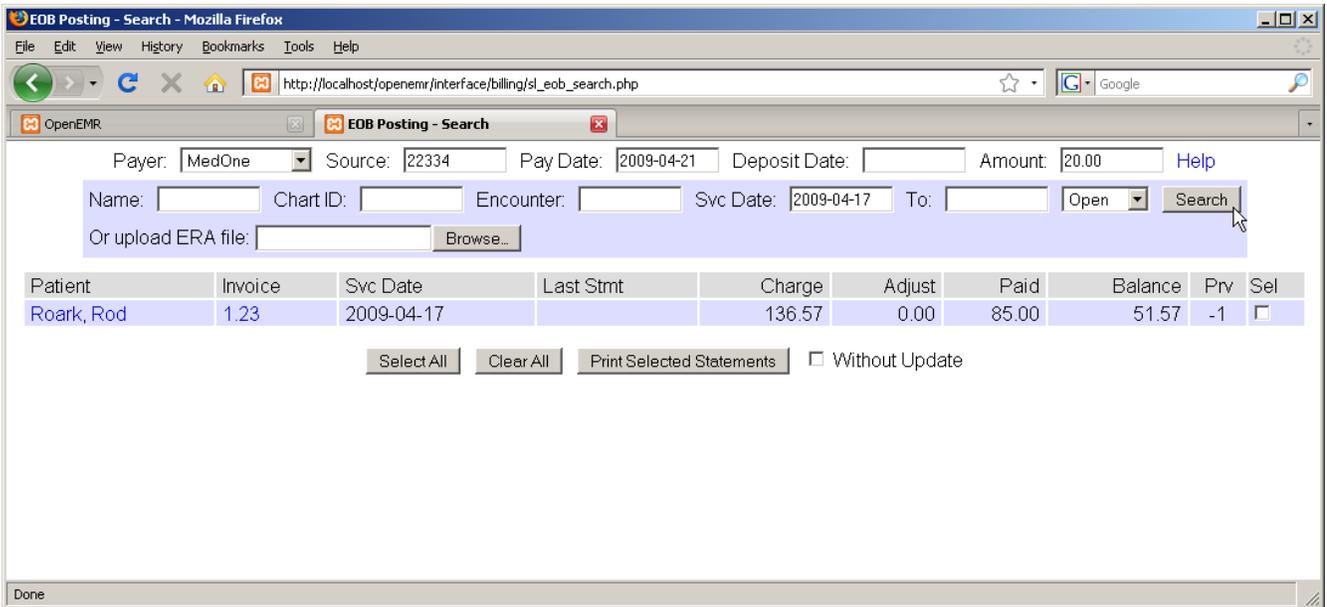
The list shows the patient and invoice number, as well as the current balance to be paid. The number with a '-' in the 'Prv' column indicates the number of insurance companies for which this invoice is awaiting payment.

**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			<input type="text" value="20"/>	<input type="text" value="16.57"/> W	<ul style="list-style-type: none"> <li>Ins adjust</li> <li>Call w/o</li> <li>Pt released</li> <li>Sm debt w/o</li> <li>To ded'ble</li> <li>To copay</li> <li>Bad check</li> <li>Bad debt</li> <li>Discount</li> <li>Hardship w/o</li> <li>Ins refund</li> <li>Pt refund</li> <li>Ins overpaid</li> <li>Pt overpaid</li> <li>Adm adjust</li> <li>Untimely filing</li> <li>Ins bundling</li> <li>After hrs calls</li> </ul>

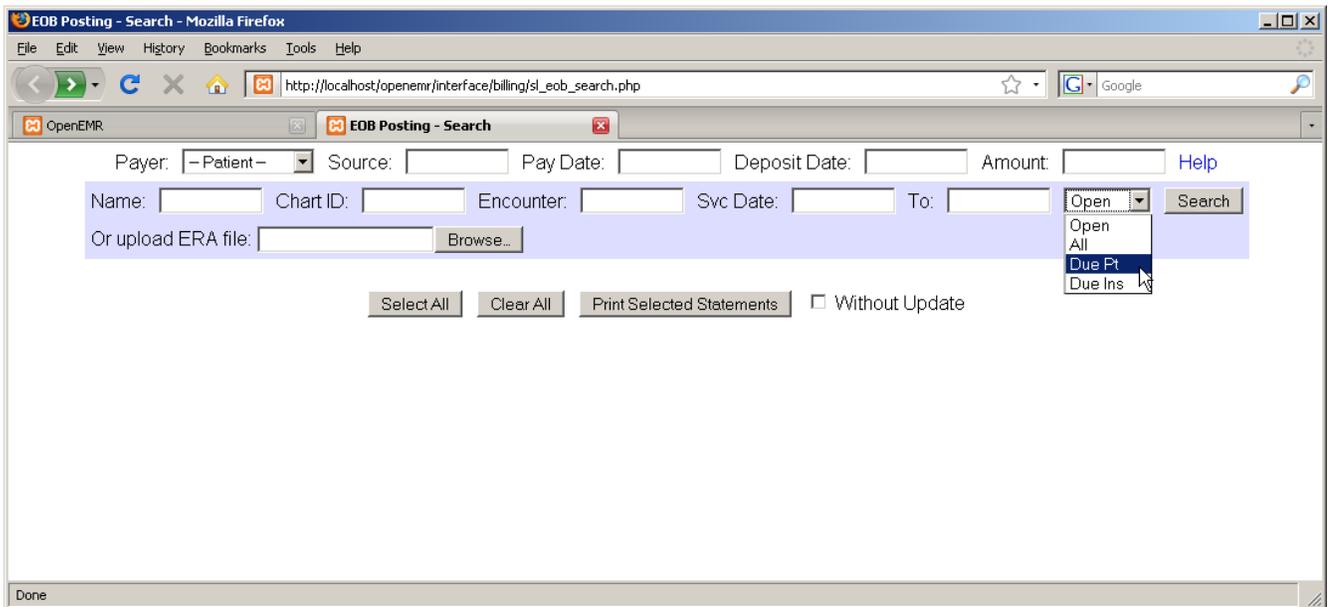
Done

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

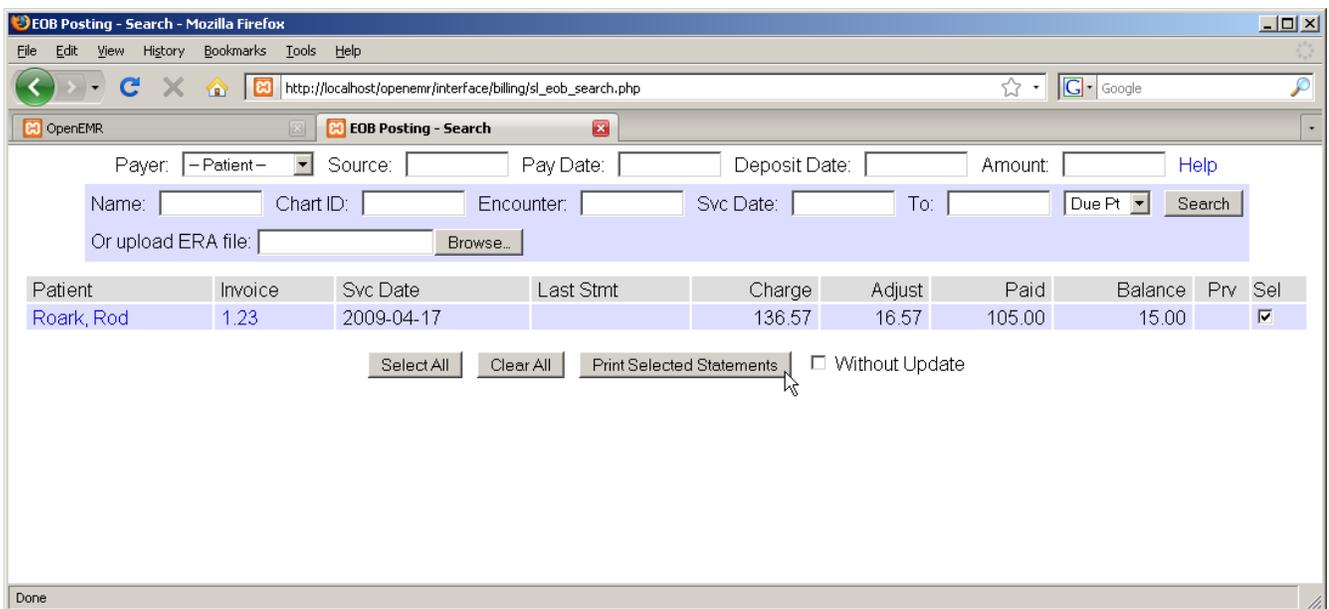
Invoice adjustments may also be made here. Enter the adjustment amount (or click 'W' to waive the entire remaining balance), and select a reason for the adjustment from the drop-down list provided. Click 'Save' when finished.

### Patient Invoices and Payments

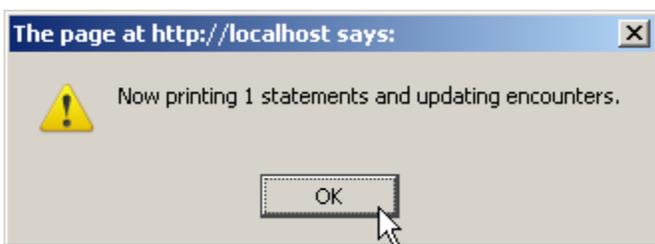
Once payments from the insurance companies have been received and entered, you can use OpenEMR's EOB page to generate invoices for billing patients the remaining amounts.



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.



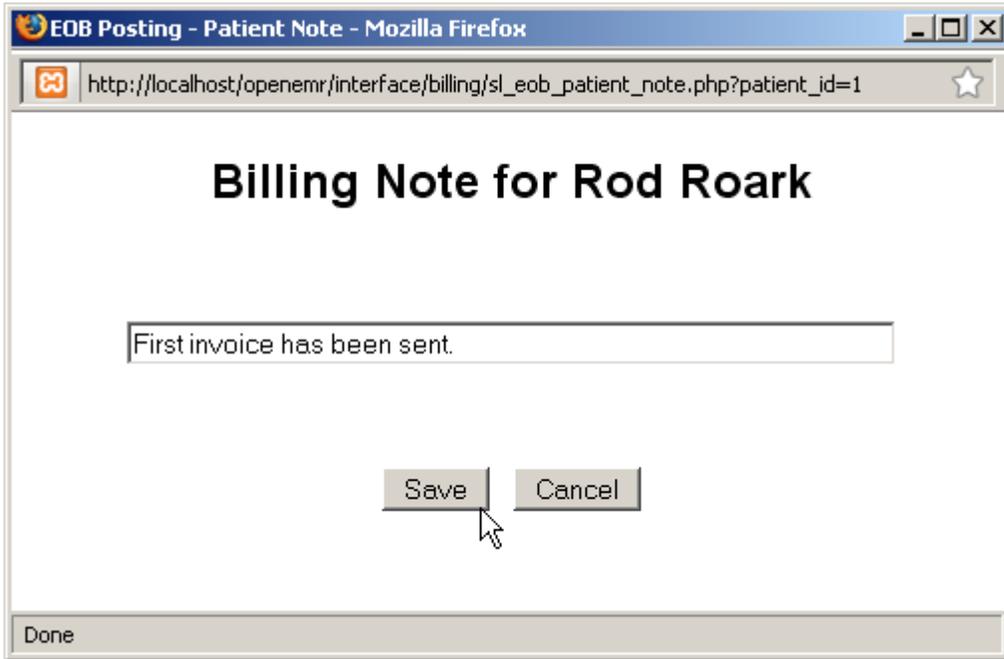
Check the box next to the desired invoice and click 'Print Selected Statements' to generate an invoice for that patient using a customizable template. Depending on your clinic's OpenEMR configuration, the invoice may be printed automatically.



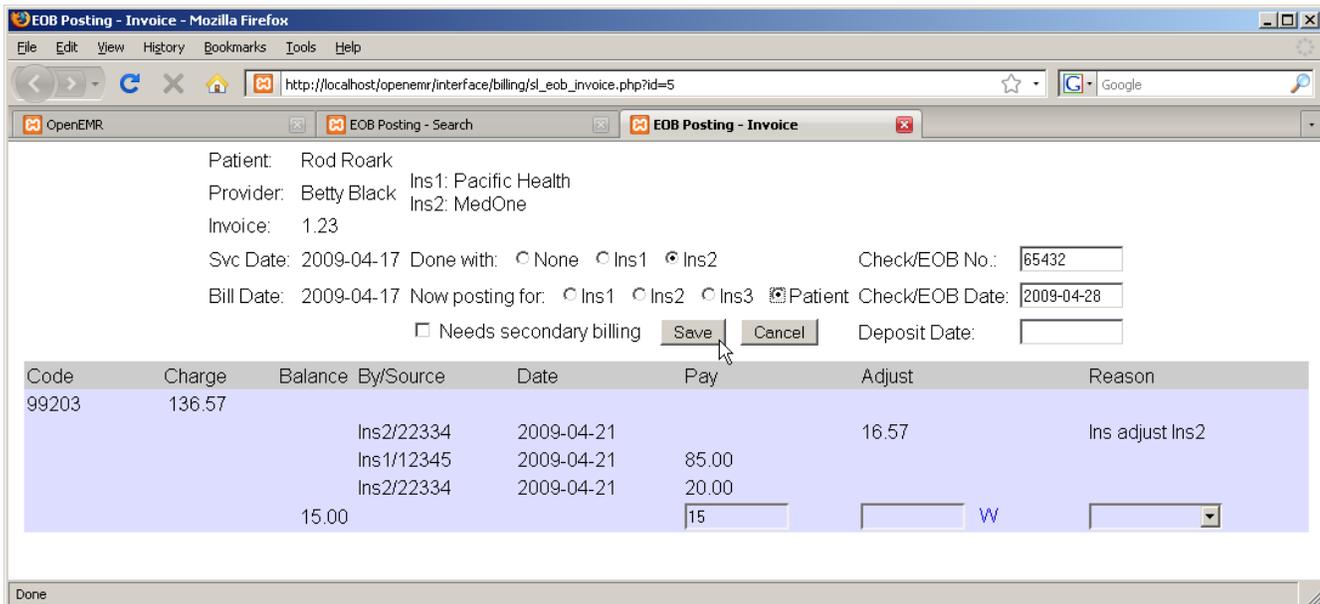
A '1' in the 'Prv' column now indicates that the patient has been billed once for this claim. This number will increment every time a new invoice is printed for this encounter. This is useful when printing so that second

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'.



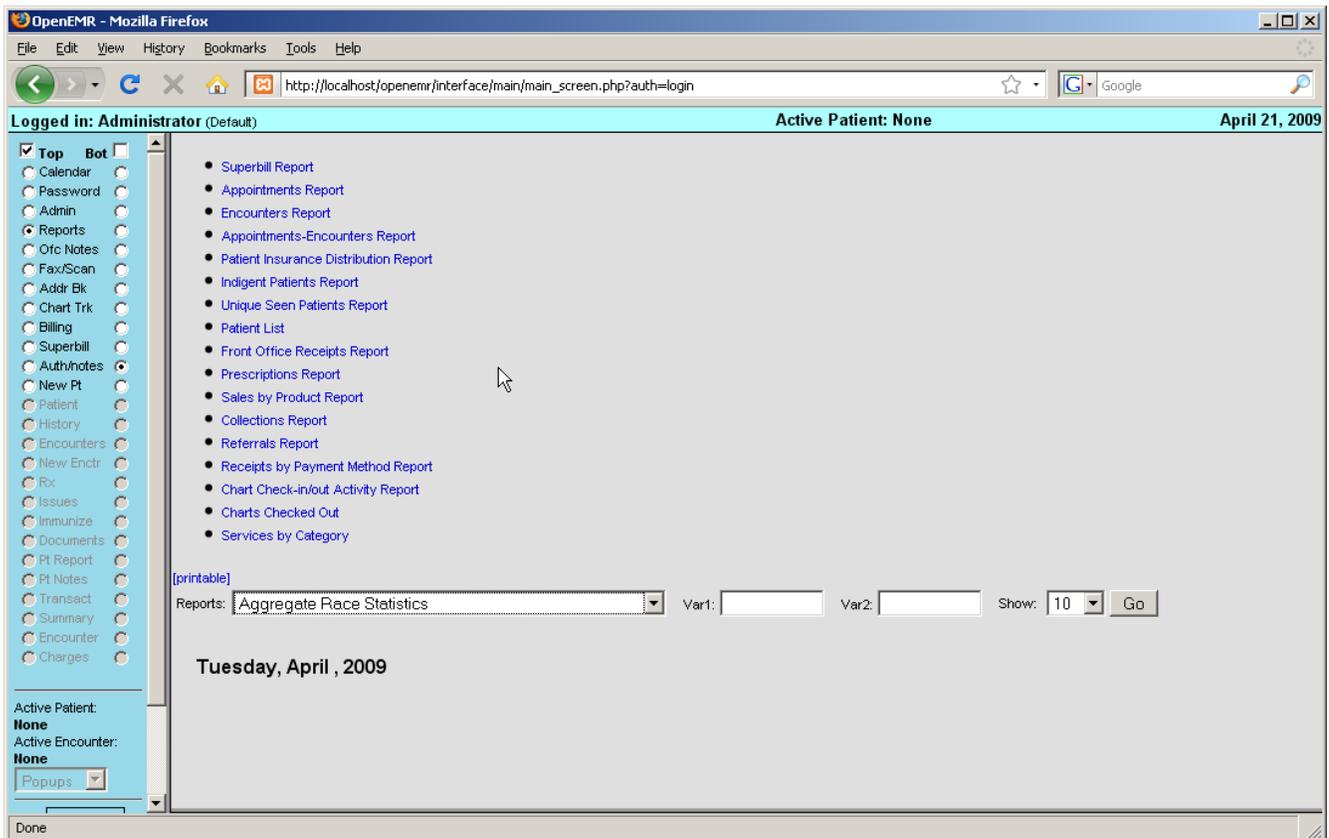
## Reporting

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.

The screenshot displays the OpenEMR web interface. At the top, 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 includes "Logged in: Administrator (Default)", "Active Patient: None", and the date "April 21, 2009". A navigation menu on the left side lists various tools, with "Reports" selected. The main content area shows a calendar view for "Administrator" on "Tuesday, April 21, 2009". The calendar grid shows times from 8:00 to 12:00. The 8:00 slot is highlighted in red. The 9:30 slot contains the text "IN". Below the calendar, there are links for "Patient Notes (See All)" and "Authorizations (More)". The status bar at the bottom shows "Done".

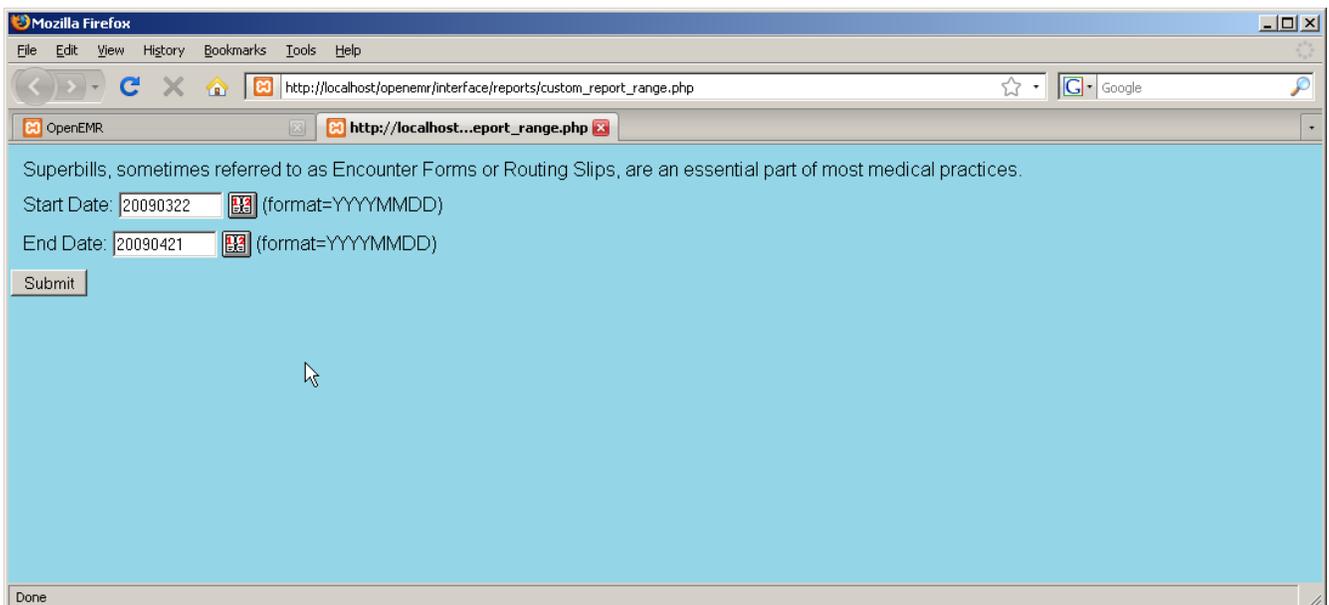
## General Reports

Most general reporting tools can be found by selecting 'Reports' from the navigation menu at left.



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  
 File Edit View History Bookmarks Tools Help  
 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:**

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

**Secondary:**

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

Done

As well as the billing codes and amounts.

Mozilla Firefox  
 File Edit View History Bookmarks Tools Help  
 http://localhost/openemr/interface/reports/custom\_report\_range.php  
 OpenEMR http://localhost...eport\_range.php

**Secondary:**

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

**Tertiary:**

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

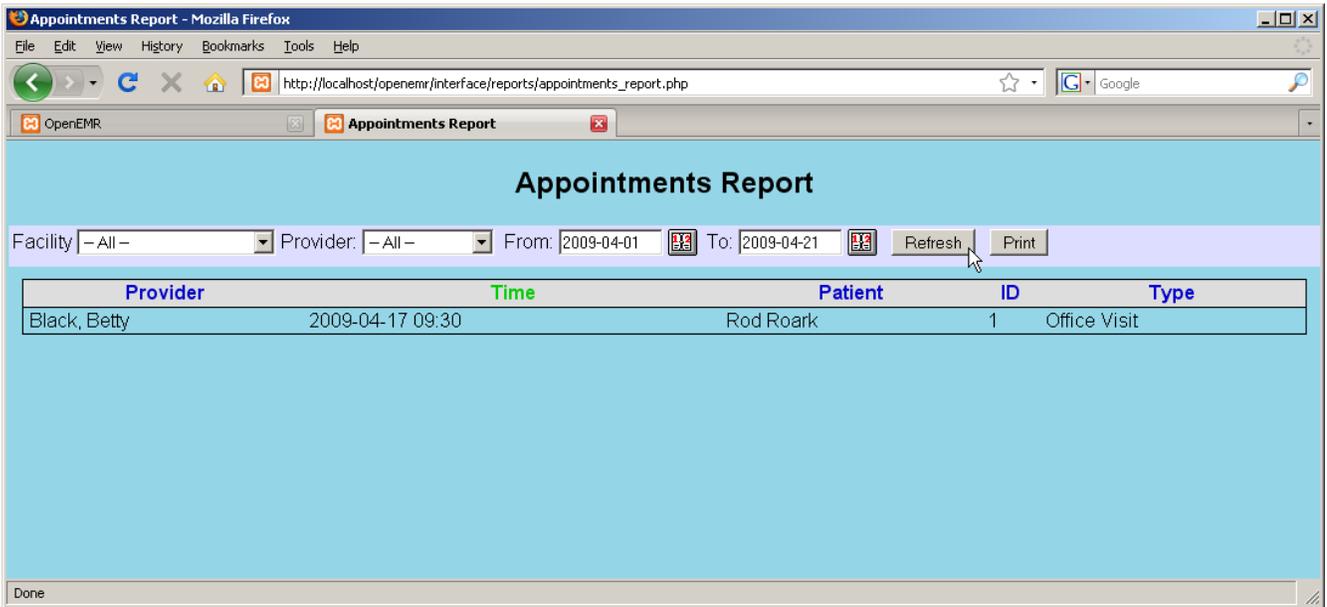
**Billing Information:**

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
		<b>Sub-Total</b>	136.57
		<b>Paid</b>	0.00
		<b>Total</b>	136.57

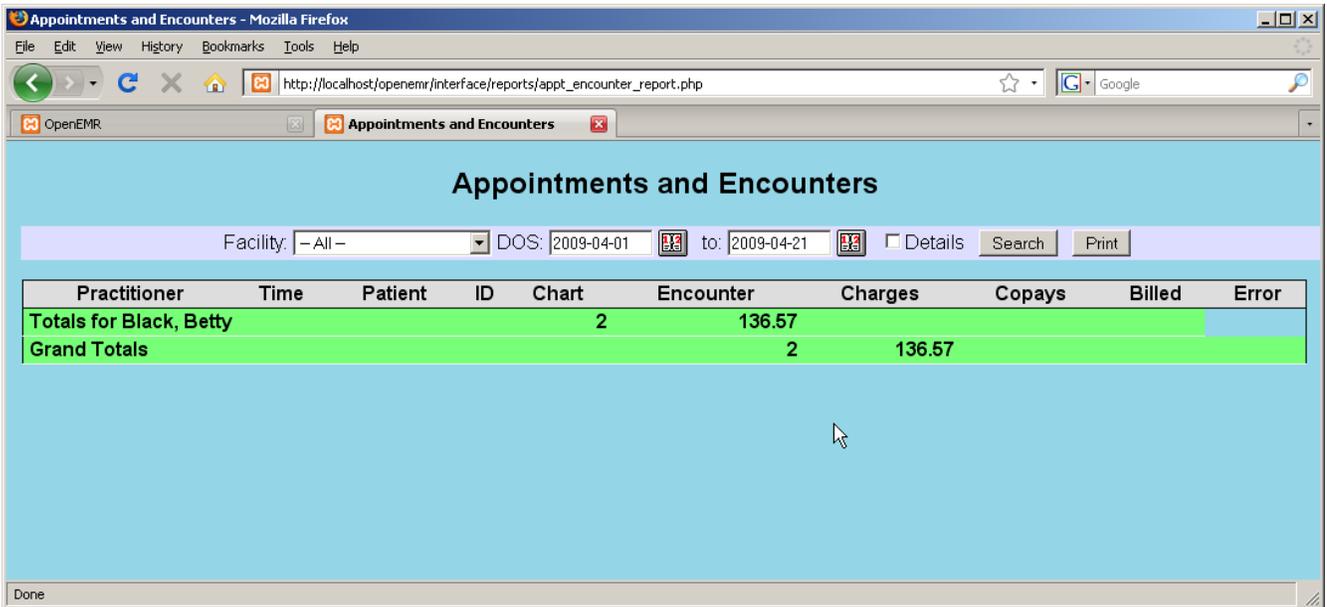
Physician Signature: \_\_\_\_\_

Done

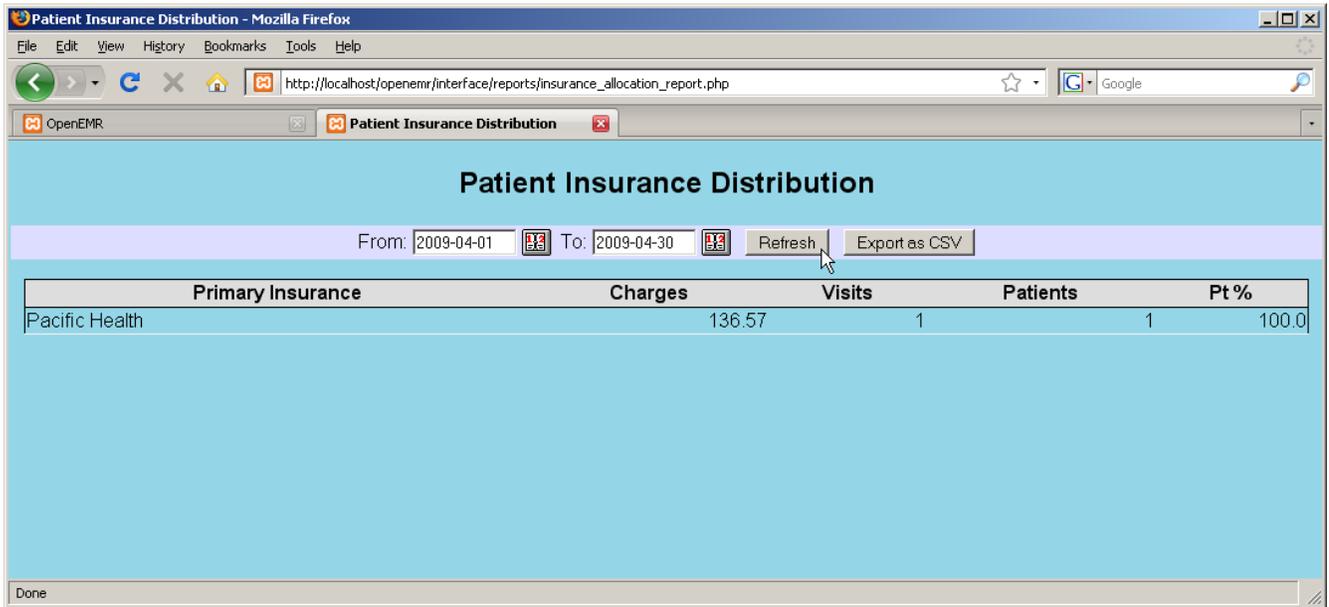
The Appointments Report gives you a list of appointments for a given provider, or for all providers, in a specified date range. It can be sorted by clicking on any of the four column headings.



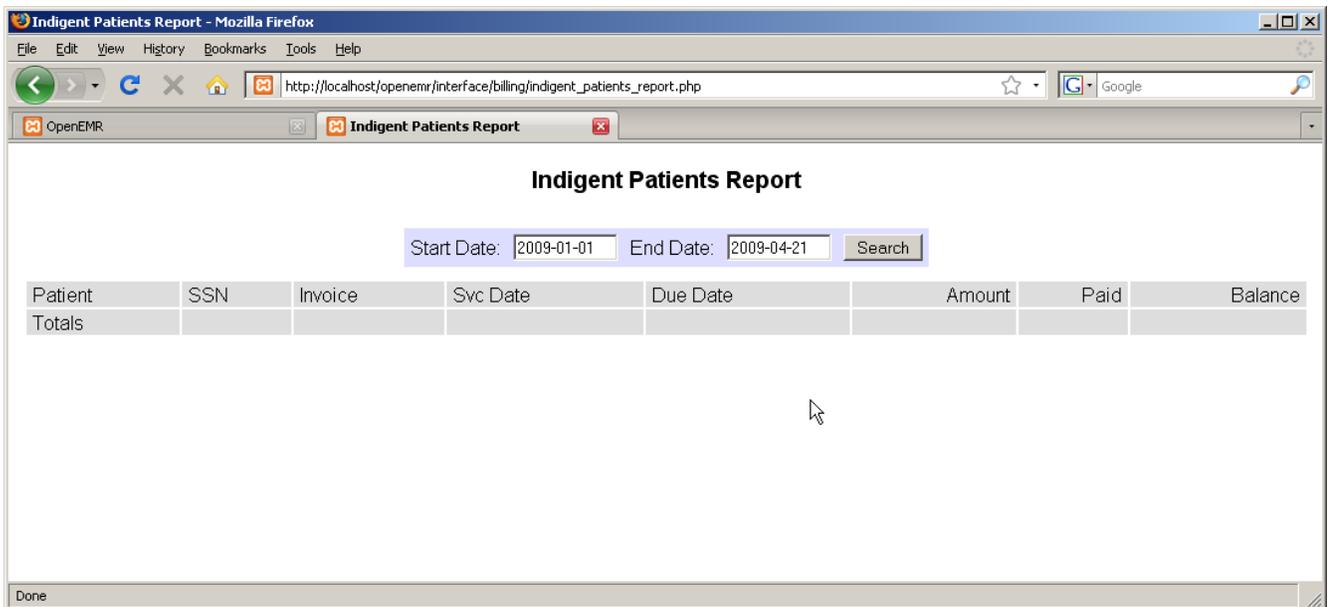
The Appointments and Encounters Report gives you a useful cross-reference of appointments with their corresponding encounters. This allows you to easily spot many types of errors, such as appointments with missing encounters, encounters with missing appointments, missing charges, and authorizations or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



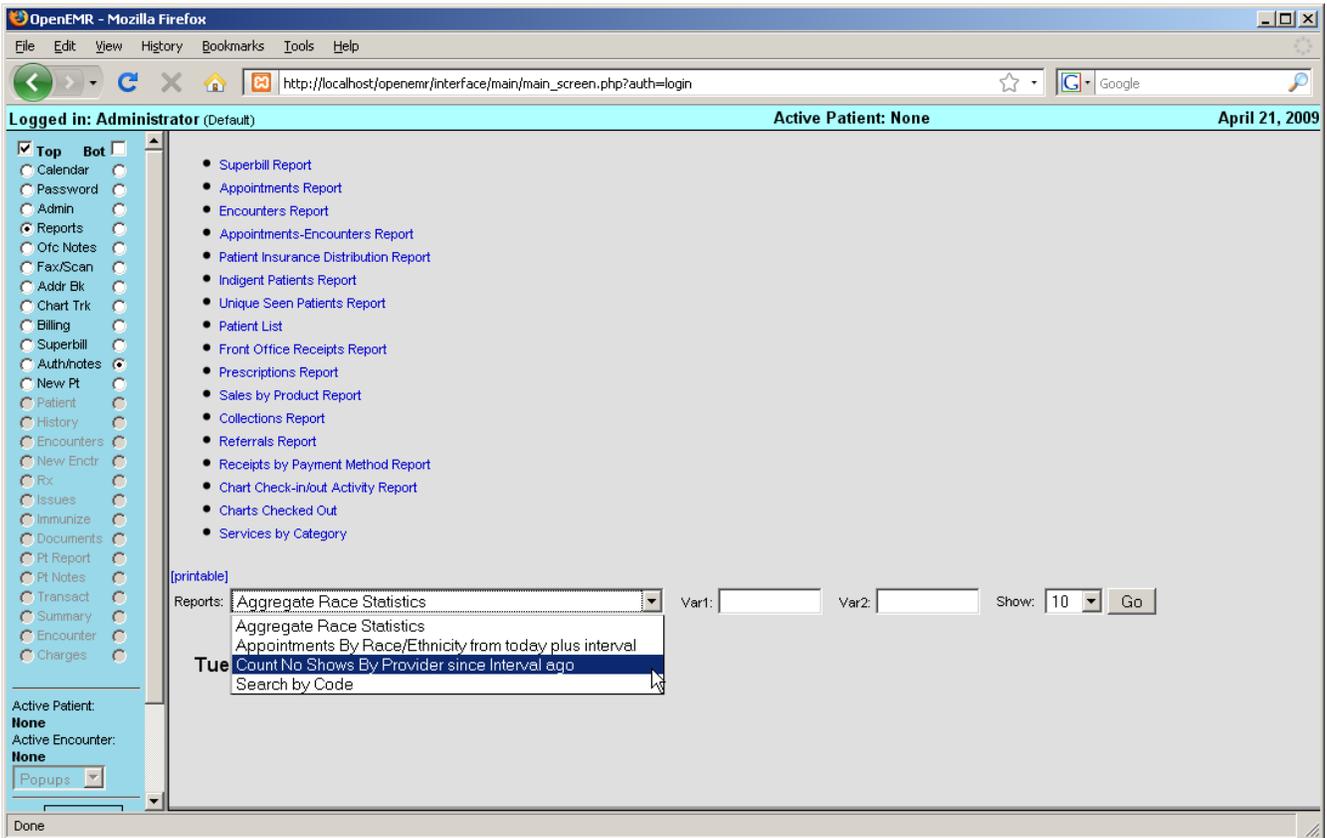
The Insurance Distribution report shows you how many patients seen over a given time period use each kind of insurance.



The Indigent Patients report lists all encounters for patients that were seen without insurance. (None shown here.)

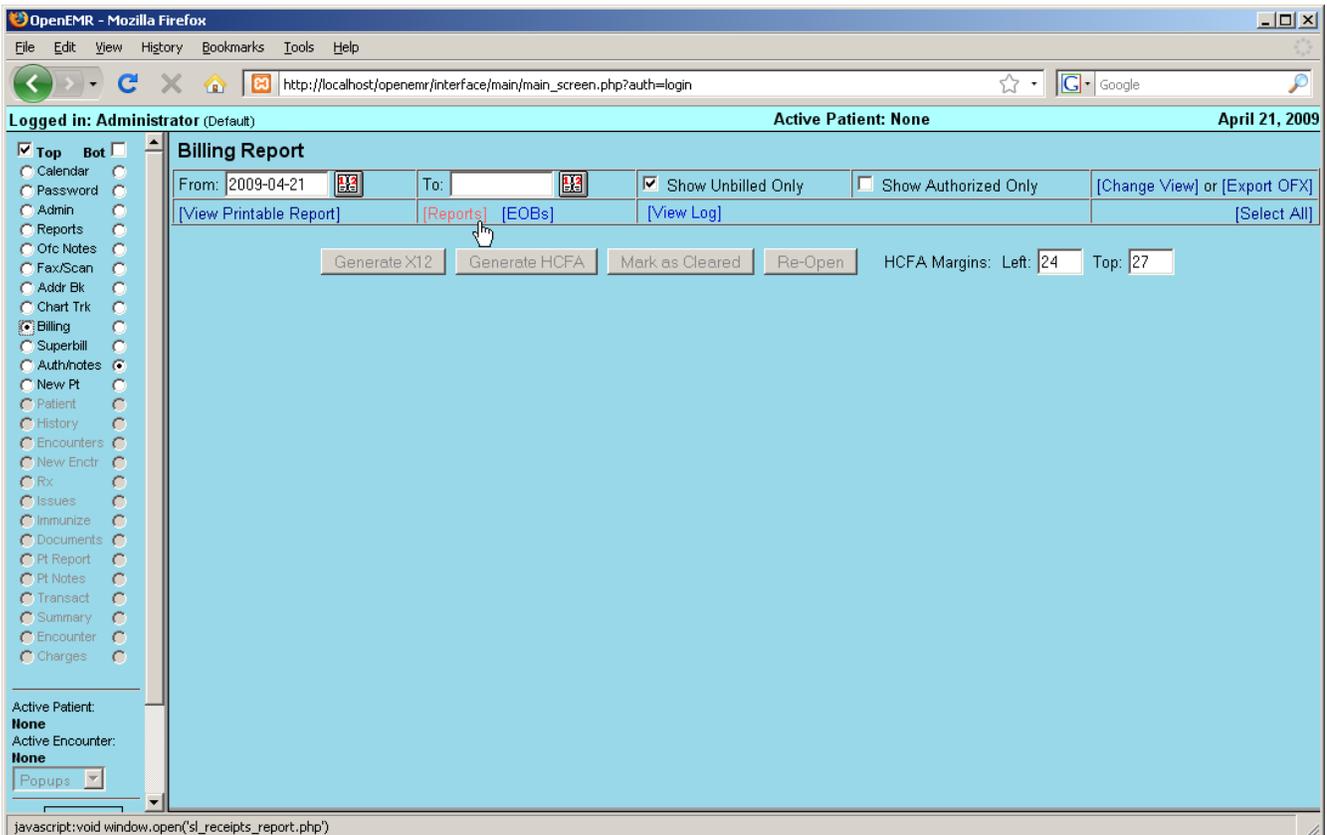


OpenEMR also allows you to create custom reports using the Database Reporting section of Administration. Some examples have been included by default.



## 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.

**Cash Receipts by Provider**

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

Refresh | Print

Practitioner	Date	Received
Totals for Betty Black		120.00
Grand Totals		120.00

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**

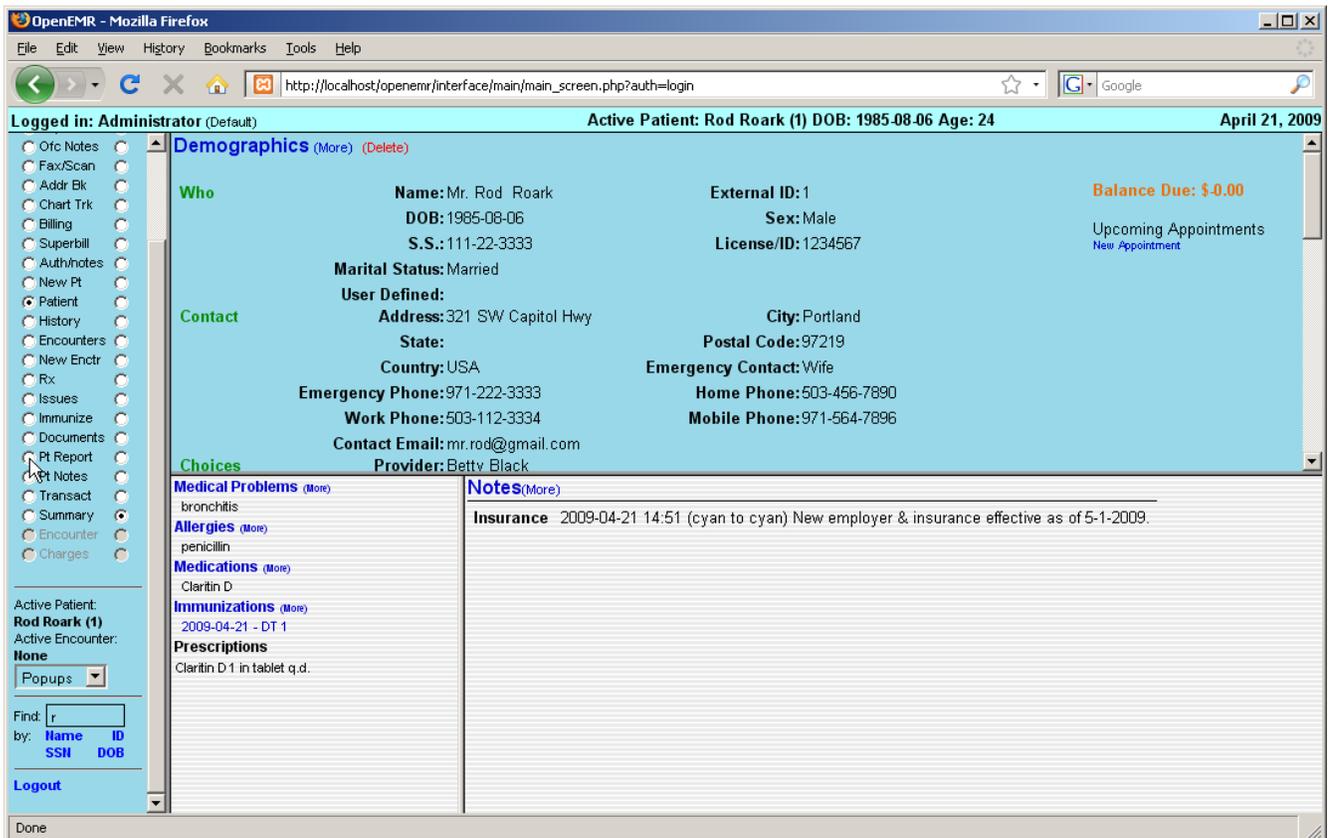
- All Facilities - | - All Providers - | Payment Date | From: 2009-04-01 | To: 2009-04-30 | CPT: | ICD: |  Details |  Procedures

Refresh | Print

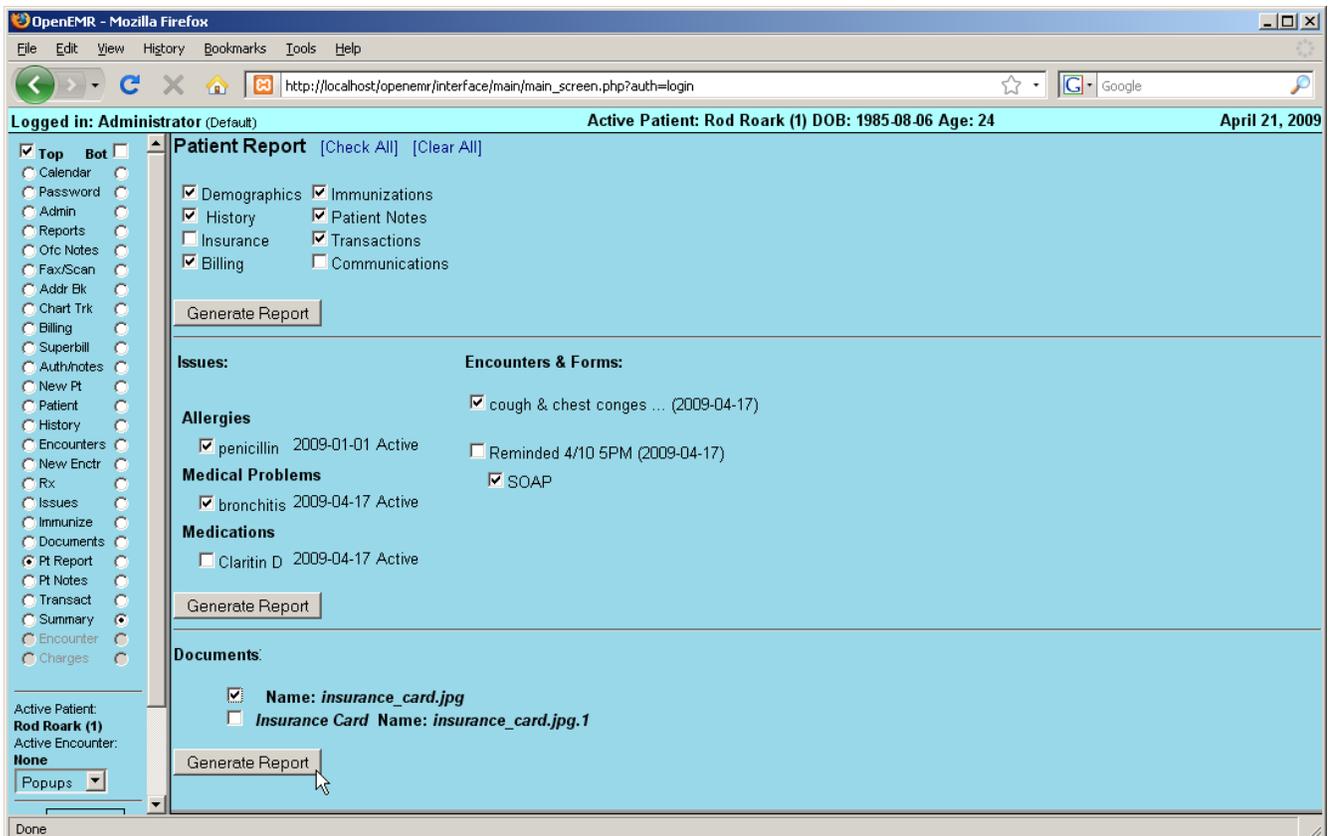
Practitioner	Date	Invoice	Procedure	Prof.	Clinic
Betty Black	2009-04-21	1.23	99203	85.00	
	2009-04-21	1.23	99203	20.00	
	2009-04-28	1.23	99203	15.00	
Totals for Betty Black				120.00	
Grand Totals				120.00	

## 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.



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.

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

**Patient Report (Back)**  
 [Printable Version]

---

**Patient Data:**

**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

**Contact**  
 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

**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

Done

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

---

**Billing Information:**  
 2009-04-17 : (CPT4) 99203 -  
 2009-04-17 : (ICD9) 477.8 - Allergic rhinitis, other allergen

---

**Patient Immunization:**  
 2009-04-21 - DT 1

---

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

---

**Patient Transactions:**  
 2009-04-21:(Referral) See Dr. Green for lesion on scalp.  
 2009-04-21:(Physician Request) request pre-authorization for air filtration system in patient home.

---

**Issues**

**Allergies:**  
 penicillin:

**Medical Problems:**  
 bronchitis:  
 [Diagnosis]  
 ICD9:477.8: Allergic rhinitis, other allergen

---

**New Patient Encounter**

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

Done

- 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

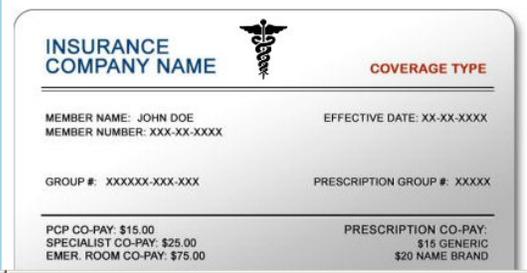
### New Patient Encounter

(2009-04-17) Provider: Betty Black  
**Reason:** cough & chest congestion  
**Facility:**  
**Procedure:** 99203

#### SOAP

(2009-04-17)  
**Subjective:** subjective description goes here  
**Objective:** clinical observations go here  
**Assessment:** doctor's assessment goes here  
**Plan:** patient's treatment plan goes here

#### Document 'insurance\_card.jpg'



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