

## Lab 6: openEMR: EHR Clinical workflow and functions of Front Desk tasks

### 6.1 Learning Objectives:

- to learn typical Front desk staff (receptionist) tasks and functions a typical EHR system must provide to support.
- to practice EHR functions to support Front Desk staff roles in a health organization.

### 6.2 Practical Exercises

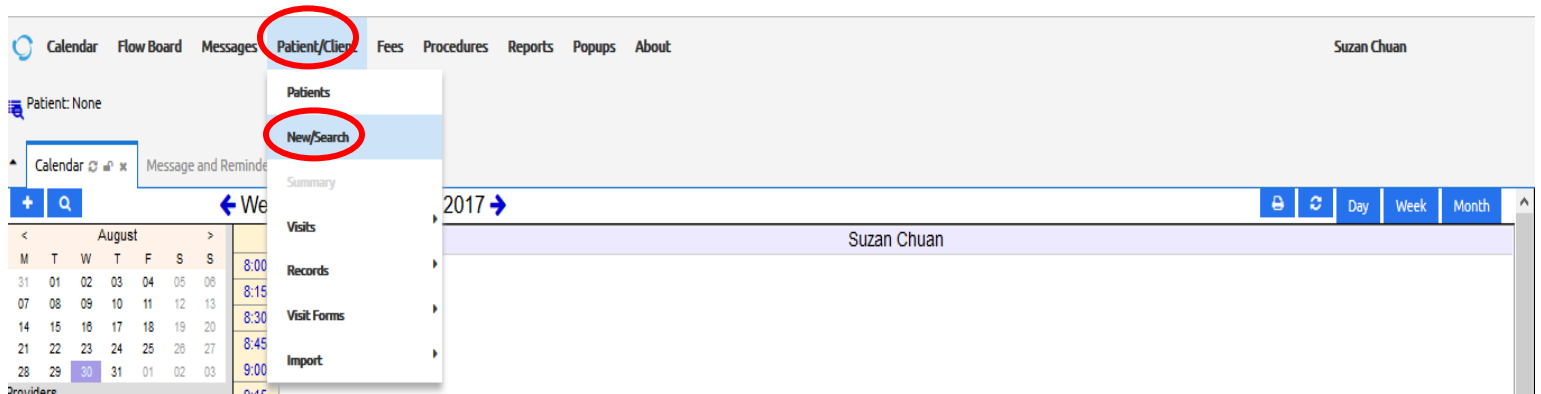
Consider the following patient scenario

A patient, named Ahmad Nasser Mahmoud, born on the 1/1/1995, lives in Birzeit, ID number 333244423 and his tel number is 023222323, Ahmad had tummy pain two weeks ago. Ahmad visit his Doctor, Dr Khaled, clinic and his receptionist, Suzan, and she booked him an appointment at 11:15 on that day. Ahmad explained to Suzan on the telephone that he is suffering from a tummy pain, which is record on the system.

Q1. Create a patient record for the above patient.

To create new patient, **receptionist** has to do the following:

1. Suzan has to select **New/Search from patient/client** menu



2. This will open new window called “**Search or Add Patient**” with a number of click list items as in the below figure.

Search or Add Patient


**Who**

<b>Name:</b>	Unassigned ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<b>External ID:</b>	<input type="text"/>
<b>DOB:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<b>Sex:</b>	Unassigned ▾	
<b>S.S.:</b>	<input type="text"/>			<b>License/ID:</b>	<input type="text"/>	
<b>Marital Status:</b>	Unassigned ▾					
<b>User Defined:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<b>Billing Note:</b>	<input type="text"/>					

**Contact**  
 **Choices**  
 **Employer**  
 **Stats**  
 **Misc**  
 **Guardian**  
 **Insurance**

3. Fill patient administrative data (demographics and contact) click on **Confirm Create New Patient** button

**Who**

<b>Name:</b>	Mr. <input type="text" value="Ahmad"/> <input type="text" value="N"/> <input type="text" value="Mahmoud"/>	<b>External ID:</b>	<input type="text" value="333244423"/>
<b>DOB:</b>	<input type="text" value="1995-01-01"/> 	<b>Sex:</b>	<input type="text" value="Male"/>
<b>S.S.:</b>	<input type="text"/>	<b>License/ID:</b>	<input type="text"/>
<b>Marital Status:</b>	<input type="text" value="Unassigned"/>		
<b>User Defined:</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
<b>Billing Note:</b>	<input type="text"/>		

**Contact**

<b>Address:</b>	<input type="text" value="Birzeit"/>	<b>City:</b>	<input type="text" value="Ramallah"/>
<b>State:</b>	<input type="text" value="West Bank"/>	<b>Postal Code:</b>	<input type="text" value="90500"/>
<b>County:</b>	<input type="text" value="Palestine"/>	<b>Country:</b>	<input type="text" value="Palestine"/>
<b>Mother's Name:</b>	<input type="text" value="Sonia"/>	<b>Emergency Contact:</b>	<input type="text" value="Ali Mahmoud"/>
<b>Emergency Phone:</b>	<input type="text" value="0599999999"/>	<b>Home Phone:</b>	<input type="text" value="023222323"/>
<b>Work Phone:</b>	<input type="text"/>	<b>Mobile Phone:</b>	<input type="text"/>
<b>Contact Email:</b>	<input type="text"/>	<b>Trusted Email:</b>	<input type="text"/>

4. You can enter more details about the patient through selecting the checkboxes bellow

- Contact**
- Choices**
- Employer**
- Stats**
- Misc**
- Guardian**
- Insurance**

5. Click **Confirm Create New Patient** button

6. Click again to the **Confirm Create New Patient** button as shown in the following figure.

Hits	Name	External ID	DOB	Sex	Financial Review Date	Date Deceased
------	------	-------------	-----	-----	-----------------------	---------------

No matches were found.

[Confirm Create New Patient](#)

### 7. Patient file will be as follows

## Mahmoud, Ahmad

[History](#) | [Report](#) | [Documents](#) | [Transactions](#) | [Issues](#) | [Ledger](#) | [External Data](#)

### Billing (expand)

[Edit](#) **Demographics** (expand)

[Edit](#) **Notes** (expand)

[Edit](#) **Patient Reminders** (expand)

[Edit](#) **Disclosures** (expand)

[Edit](#) **Amendments** (expand)

### Labs (expand)

### Vitals (collapse)

No vitals have been documented.

[Edit](#) **Clinical Reminders** (collapse)

[Add](#) **Appointments** (collapse)

None

### Recurrent Appointments (expand)

[Edit](#) **Medical Problems** (collapse)

Nothing Recorded

[Edit](#) **Allergies** (collapse)

Nothing Recorded

[Edit](#) **Medications** (collapse)

Nothing Recorded

[Edit](#) **Immunizations** (collapse)

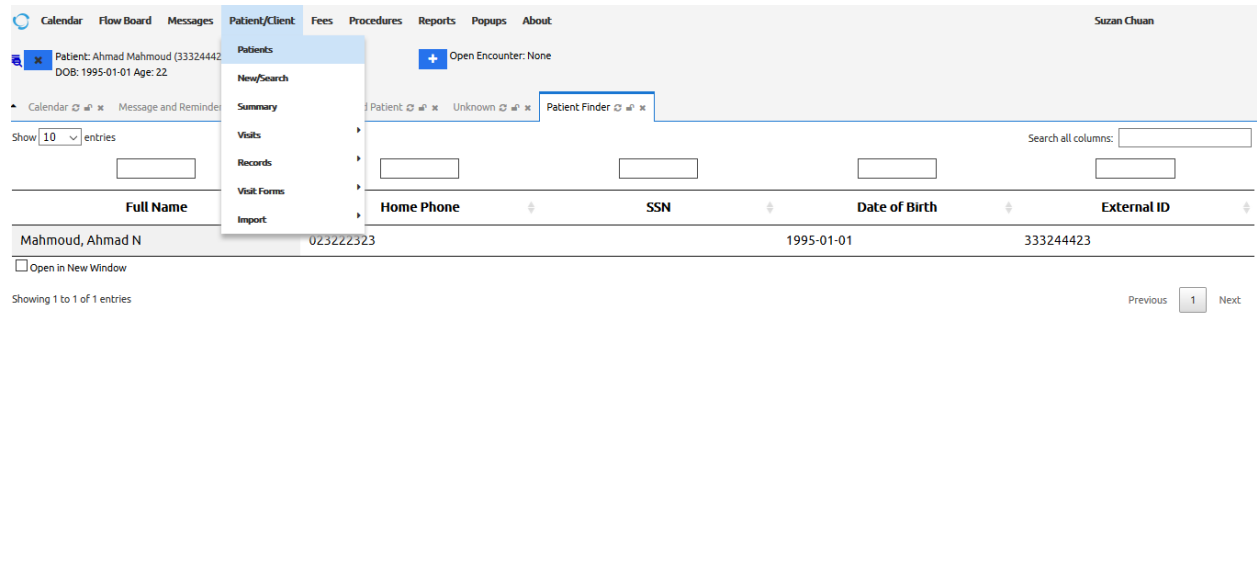
None

[Edit](#) **Prescription** (collapse)

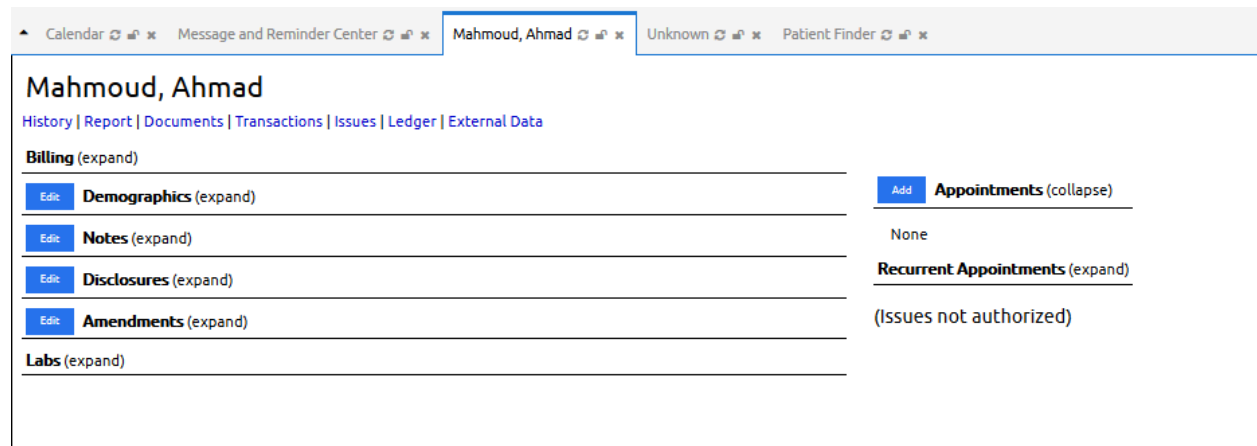
After adding basic patient data, you can edit and/or complete patient data.

**Receptionist** has to do the following:

- **Select patients from patient/client menu**



- Enter **patient name** or other information & click **search button** as shown in the above figure
- Click on the **desired patient row**
- This will open new window that display all patient data



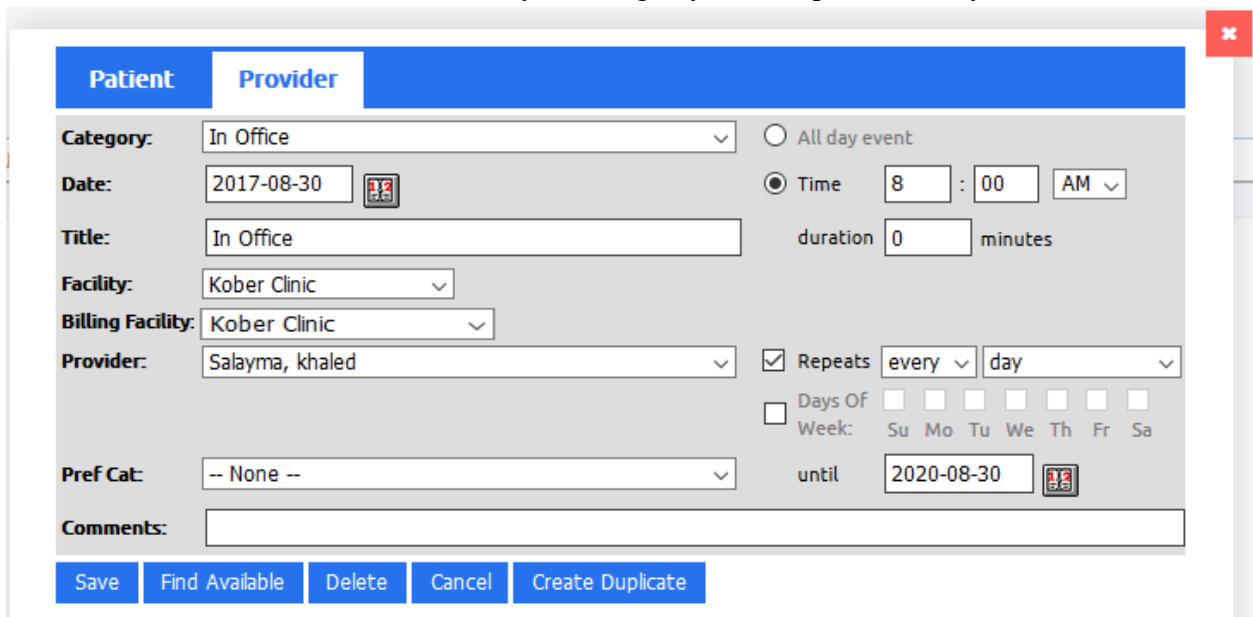
Now, you can **update existing data** and add **new administrative details**, such as generating report, upload doc., etc., as shown in figure above.

Q2. Add new appointment to for the above patient (Ahmad Mahmoud).

To set up doctor calendar, receptionist (Suzan) has to do the following

- Choose **Calendar menu**
- Click **Add** button, select the **Provider** tab
- Set up the doctor calendar as follows:

In office schedule → 8:00 AM, every working days, and repeat it for 2 years



The screenshot shows a software interface for adding a new appointment. The interface is divided into two tabs: 'Patient' and 'Provider'. The 'Provider' tab is active. The form contains the following fields and options:

- Category:** In Office (dropdown menu)
- Date:** 2017-08-30 (calendar icon)
- Title:** In Office (text input)
- Facility:** Kober Clinic (dropdown menu)
- Billing Facility:** Kober Clinic (dropdown menu)
- Provider:** Salayma, khaled (dropdown menu)
- Pref Cat:** -- None -- (dropdown menu)
- Comments:** (text input)
- Time:** 8 : 00 AM (radio button selected, dropdown menus)
- duration:** 0 minutes (text input)
- Repeats:**  Repeats every day (checkbox checked, dropdown menus)
- Days Of Week:**  Days Of Week: Su Mo Tu We Th Fr Sa (checkbox unchecked, checkboxes for days)
- until:** 2020-08-30 (text input, calendar icon)
- Buttons:** Save, Find Available, Delete, Cancel, Create Duplicate

Out office schedule → 3:00 PM, every working days, and repeat it for 2 year

**Patient** | **Provider**

**Category:** Out Of Office  All day event

**Date:** 2017-08-09  Time 3 : 00 PM

**Title:** Out Of Office duration 0 minutes

**Facility:** Kober Clinic

**Billing Facility:** Kober Clinic

**Provider:** Salayma, khaled  Repeats every day

Days Of Week: Su Mo Tu We Th Fr Sa

**Status:** - None until 2020-08-30

**Comments:**

Save Find Available Delete Cancel Create Duplicate

Lunch schedule → 12:00 – 1:00 PM, every working days, and repeat it for 2 year

On the

**Patient** | **Provider**

**Category:** Lunch  All day event

**Date:** 2017-08-09  Time 12 : 00 AM

**Title:** Lunch duration 60 minutes

**Facility:** Kober Clinic

**Billing Facility:** Kober Clinic

**Provider:** Salayma, khaled  Repeats every day

Days Of Week: Su Mo Tu We Th Fr Sa

**Status:** - None until 2020-08-30

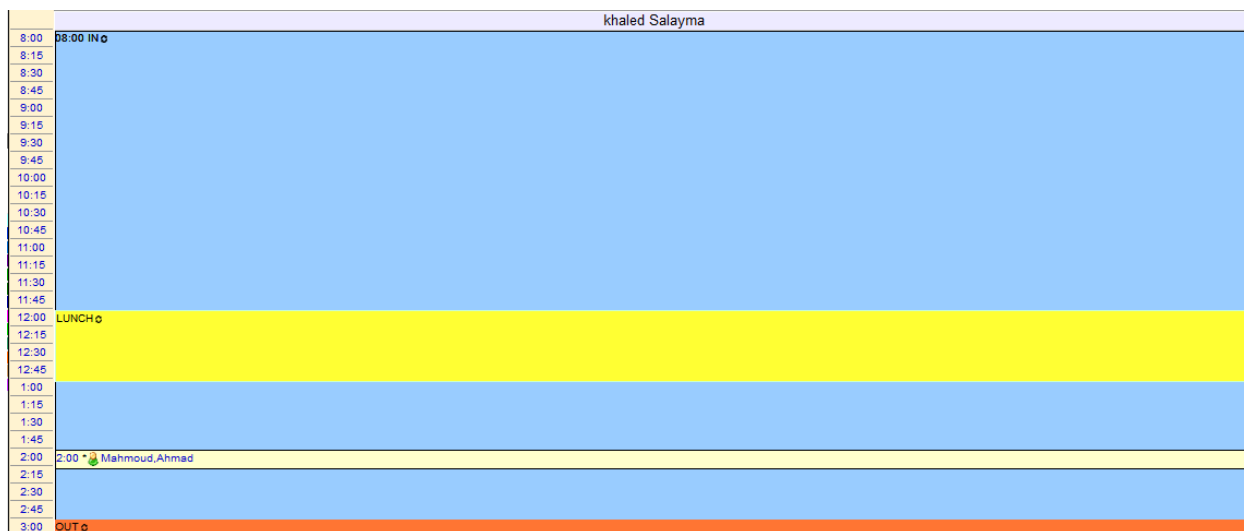
**Comments:**

Save Find Available Delete Cancel Create Duplicate

same window, choose patient tab and set up patient appointment with the doctor as shown in the following figure.

Patient		Provider	
Category:	Office Visit	<input type="radio"/> All day event	
Date:	2017-08-31	<input checked="" type="radio"/> Time	2 : 00 PM
Title:	Office Visit	duration	15 minutes
Facility:	Kober Clinic		
Billing Facility:	Kober Clinic		
Patient:	Mahmoud, Ahmad	<input type="checkbox"/> Repeats	every day
Provider:	Salayma, khaled	<input type="checkbox"/> Days OF	Su Mo Tu We Th Fr Sa
Status:	*Reminder done	until	
Room Number:			
Comments:			
Save		Find Available	
Delete		Cancel	
		Create Duplicate	

Below figure shows Dr. Khaled Calendar (the below calendar from Suzan account).



Below figure shows monthly calendar for Dr. Khaled, after register an appointment for the Patient Ahmad Mahmoud



khaled Salayma

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	01	02	03	04	05	06
07	08	09	10	11	12	13
		12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH
		2pm Mahmoud,Ahmad				
14	15	16	17	18	19	20
12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH
21	22	23	24	25	26	27
12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH
28	29	30	31	01	02	03
12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH	12pm LUNCH
			2pm Mahmoud,Ahmad			