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USER MANUAL for OpenEMR

Please note that this manual is intended to be a starting point for those trying to use the program and as OpenEMR improves, this manual will be updated to reflect those changes. Do not assume, however, that the instructions contained in this manual apply to the most recent development version.

Notification of any errors or omissions should be e-mailed to emilykillian@charter.net.

INTRODUCTION

OpenEMR is a medical software application that allows users, including medical office staff, clinical staff and physicians, to enter patient medical data. The application combines medical clinic management and electronic medical records. The application is free, open source software that runs on most major operating systems and is distributed for free at www.sourceforge.net under the GPL.

Practice management features include patient scheduling and demographics and electronic medical record features include an online record of patient notes and encounters and prescription writing capabilities.

Please be aware that changes and additions made to the database will be logged according to user name and date, thus every user should have his or her own user name and password.

Before using OpenEMR, make sure the computer is turned on and connected to the Intranet, Internet or local host. Double click the left mouse button on the desktop icon for the Internet browser.

GETTING STARTED

Logging in

The main login screen should be the first screen to come up in the Internet browser. That screen will have a box with a pull down menu labeled group. Choose the correct group from that pull down list.

Below the group, there should be an input box labeled user name, where the user should type his or her user name. The box below it should be called password and the user should type his or her password there.

Once the correct group, user name and password are entered, click on the login button.

If the system does not log the user on the first time, check to make sure the user name and password are typed in correctly and that Caps Lock was not on.

Please see following screenshot.

OpenEMR Users Guide

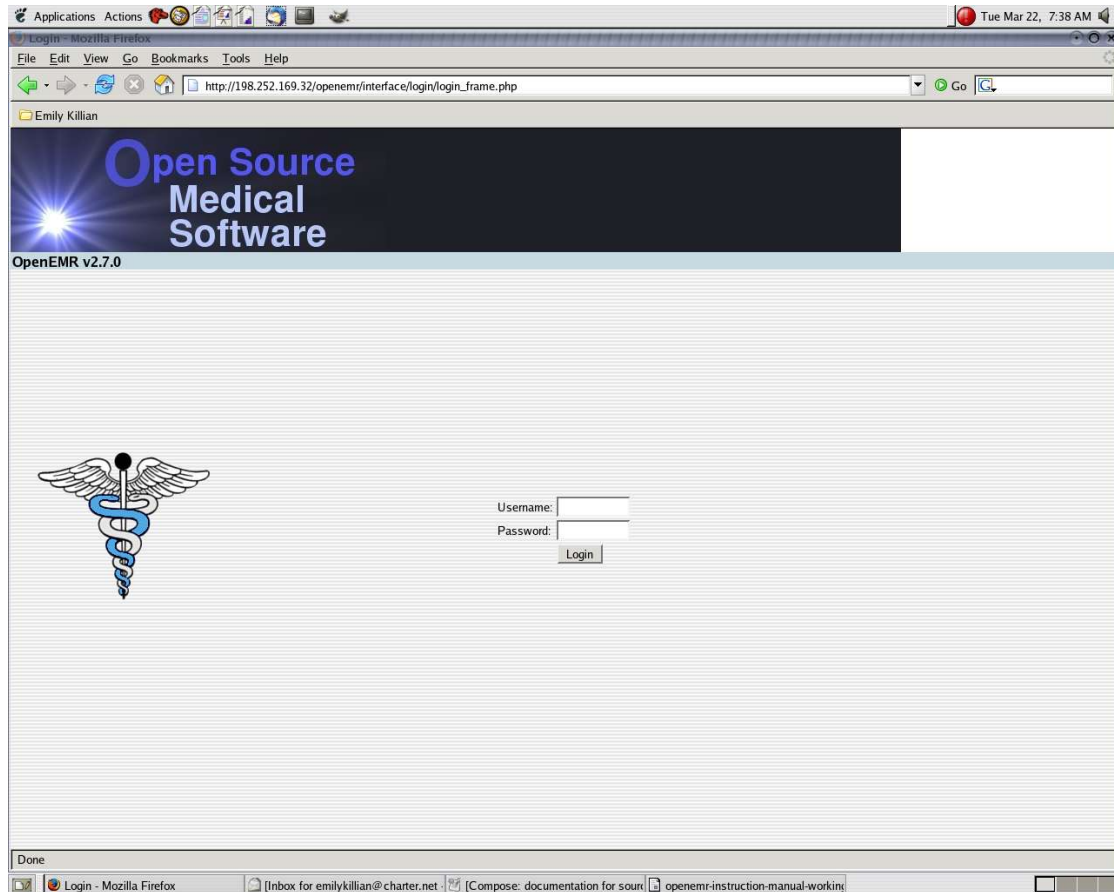


Illustration 1

Each user must login using his or her user name and password. Changes and additions made to the database are tracked by user.

Changing passwords

To change a user password, that user should log in using their old password.

Once logged in, the user should click on change password in the top rail. Then type in the new password in the input boxes.

Click on save changes.

Please see following screenshot.

OpenEMR Users Guide

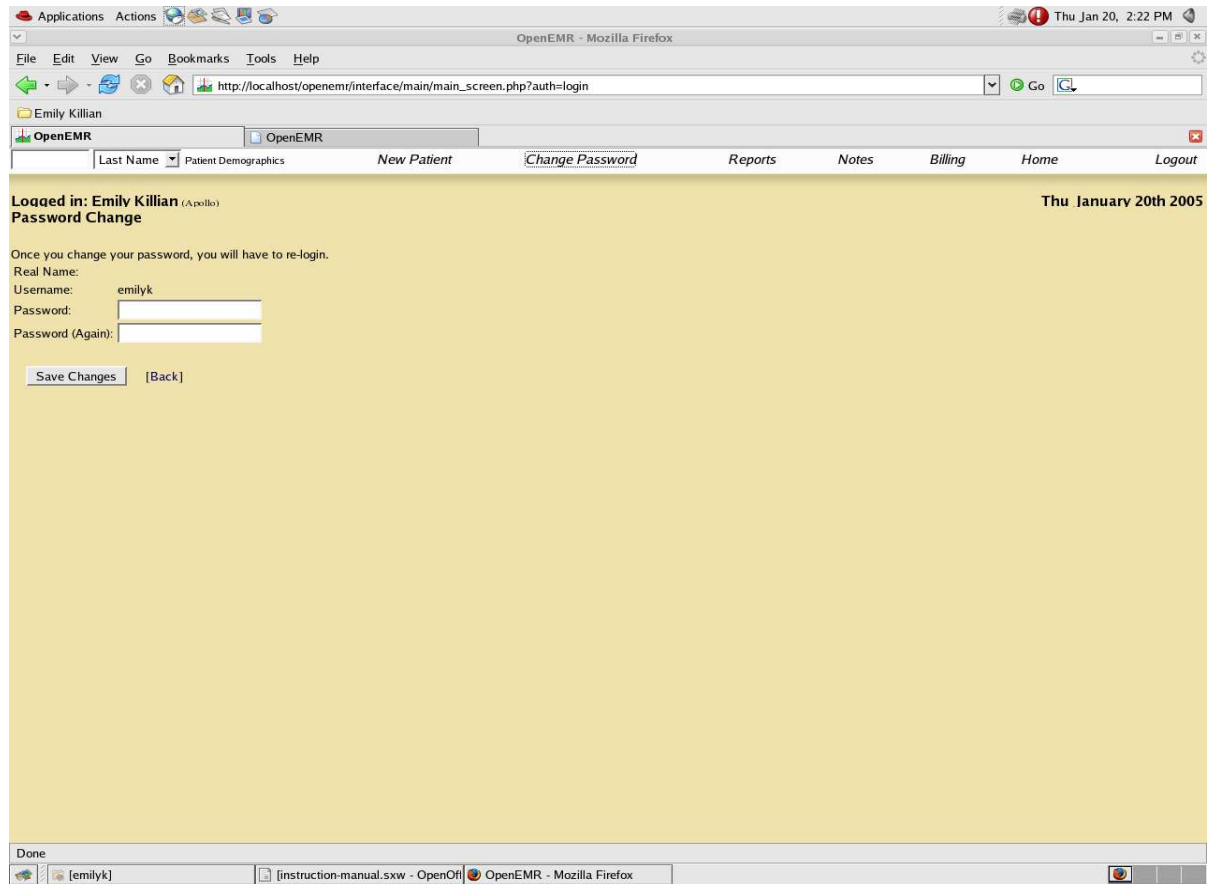


Illustration 2

Passwords are used to maintain the integrity of the system by protecting it from unauthorized use.

Getting back to the main screen

To get back to the main screen, click on home from the top rail.

If there is not a link for home, there should be a link for back.

Click back to get to the main screen.

If there is not a link for back, click on close, which is also located in the top rail.

Please see following screenshot.

OpenEMR Users Guide

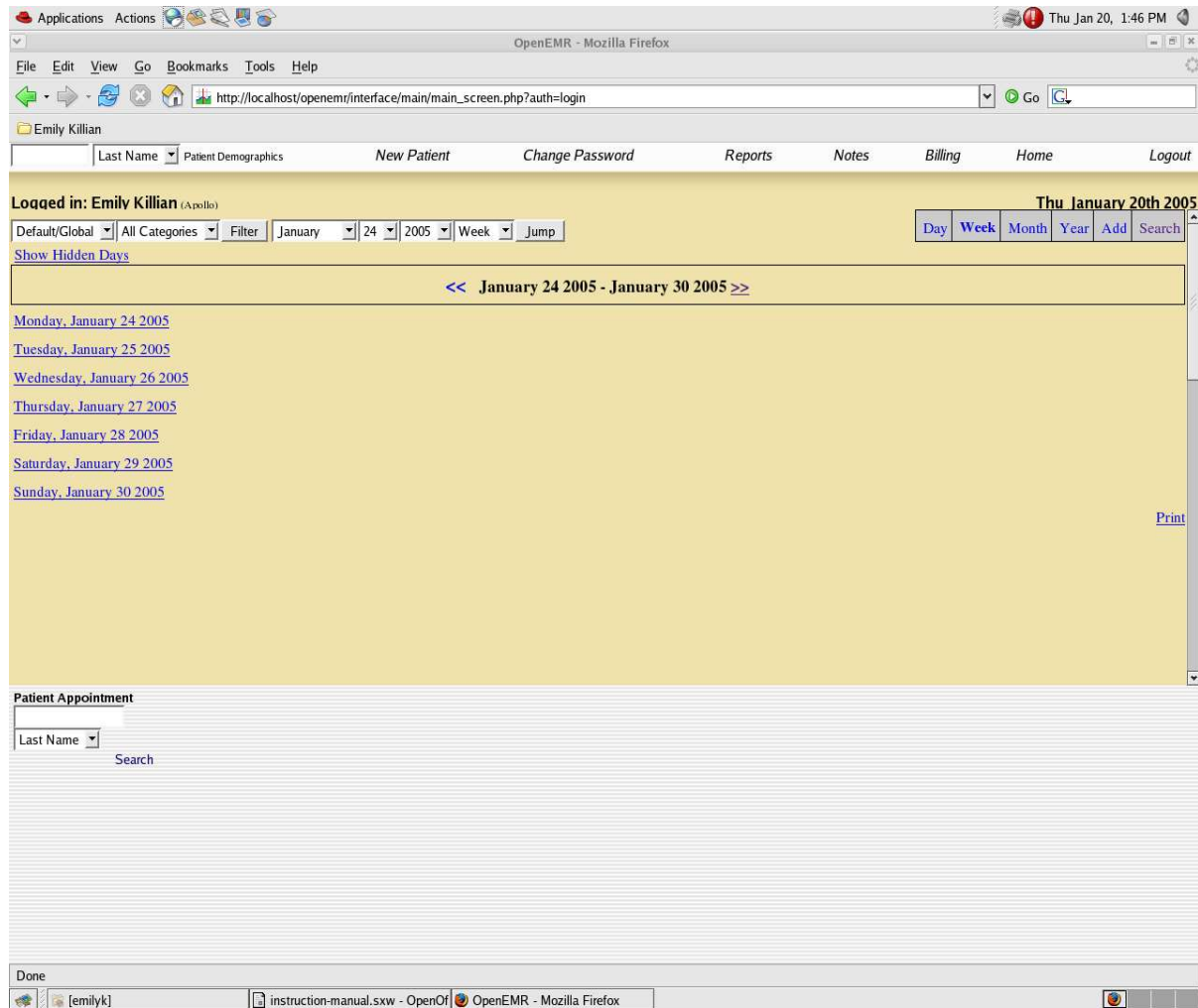


Illustration 3

The main screen is a jumping off point for users and will be referred to extensively in this manual.

PATIENT DEMOGRAPHICS

Searching for a patient

To search for a patient, go to the top, left corner and type the patient's last name, ID number, social security number or date of birth into the input box. Select the criteria type from the pull down box beside the input box and click patient demographics.

Entering patient demographics for new patients

To enter patient demographics for a new patient, go to the top, left-hand corner of the screen and select new patient.

Type the rest of the patient's personal information like last name, social security number, address, phone, employer and date of birth.

Click on save demographics.

Please see following screenshot.

OpenEMR Users Guide

The screenshot shows the OpenEMR interface in a Mozilla Firefox browser window. The address bar shows the URL: `http://localhost/openemr/interface/patient_file/patient_file.php?set_pid=2877`. The browser's title bar says "OpenEMR - Mozilla Firefox". The page has a navigation bar with tabs: Summary, History, Encounter, Transaction, Documents, Report, and Close. The main content area is titled "EMILY KILLIAN (Age 23 ID 2877) Logged in as: Emily Killian (Anello)". Below this is the "Demographics" section. The form contains the following fields: Name (Ms. EMILY R KILLIAN), DOB (09/07/1982), Patient Number (2877), Sex (Female), Emergency Contact (empty), S.S. (245-37-3863), Emergency Phone (empty), Address (602 SOUTH WASHINGTON S), City (SHELBY), State (NC), Zip Code (28150), Home Phone (empty), Work Phone ((704) 484-7000), Mobile Phone ((704) 472-9699), Contact Email (emilykillian@yahoo.com), Country (empty), Marital Status (Single), Provider (Unassigned), and User Defined Fields (Works here on weekends, empty). There are three "Save Patient Demographics" buttons. Below the demographics section is the "Occupation" section with fields for Occupation (Reporter), Employer Address (PO BOX 48), City (Shelby), State (NC), Zip Code (28152), and Country (empty). There are two "Save Patient Demographics" buttons. Below that is the "Language" section with a dropdown menu (English) and a text field (English). Below that is the "Race/Ethnicity" section with a dropdown menu (Caucasian) and a text field (Caucasian). Below that is the "Financial Review Date" section with a date field (08/21/2004). Below that is the "Family Size" section with a text field (lives alone). Below that is the "Monthly Income" section with a text field (Numbers only). Below that is the "Homeless, etc.:" section with a text field. Below that is the "Interpreter:" section with a text field. Below that is the "Migrant/Seasonal:" section with a text field. Below that is the "Primary Insurance Provider:" section with a text field. Below that is the "Subscriber:" section with a text field. The browser's status bar shows "Done" and the taskbar shows the OpenEMR application.

Illustration 4

Patient demographics are used to identify and track patients. They include name, address and date of birth, among other categories.

Entering patient insurance

Once you have entered patient demographics and saved them, begin entering in insurance information. There is space for at least three insurances per patient.

Either choose an established insurance type from the drop down list or create your own.

If using the drop down list, continue filling in the insurance blanks and click save patient demographics. Do the same for secondary and tertiary insurance whenever applicable.

If creating a new insurance, click on Add new insurer. Fill in the blanks, choose the correct payer type and hit update.

Click on close in the top right-hand corner of the page.

Go back into the patient's account and select the insurance, which has been added to the drop down list. Click save patient demographics and review the patient's information to make sure it is correct.

Adding or modifying patient demographics

Once in the patient's health record, click on the demographics link near the top, left-hand side of the page.

Begin filling in the blanks that apply to your patient and click on save demographics.

Editing a patient's demographic information from the appointment scheduler

Each patient appointment has a colored box with appointment and patient information displayed. They also have a button with a folder logo.

Clicking that button will bring up the patient's demographic information, which can be edited from there.

APPOINTMENT SCHEDULING

Searching for an appointment

From the main screen, click on search. Type in your keyword, which can be the patient's last name or a word in the appointment description.

To view the appointment from there, click on the patient's name or the appointment description. Both will be highlighted in blue.

Adding an appointment

To add an appointment from the main screen, type in the patient's last name, date of birth, social security number or identification number in the input box at the bottom-left of the screen. Choose from the drop down menu the search criteria you are looking under. Click on search.

A list of possible matches will be displayed to the right of the input box. Select the patient match you want to view by clicking on it.

Under event title, type in the type of appointment (established patient follow up, new patient visit, etc...). Select the appointment date, provider, appointment category, time and duration. Then hit go. You will then see a message that says your event has been submitted.

Please see following screenshot.

OpenEMR Users Guide

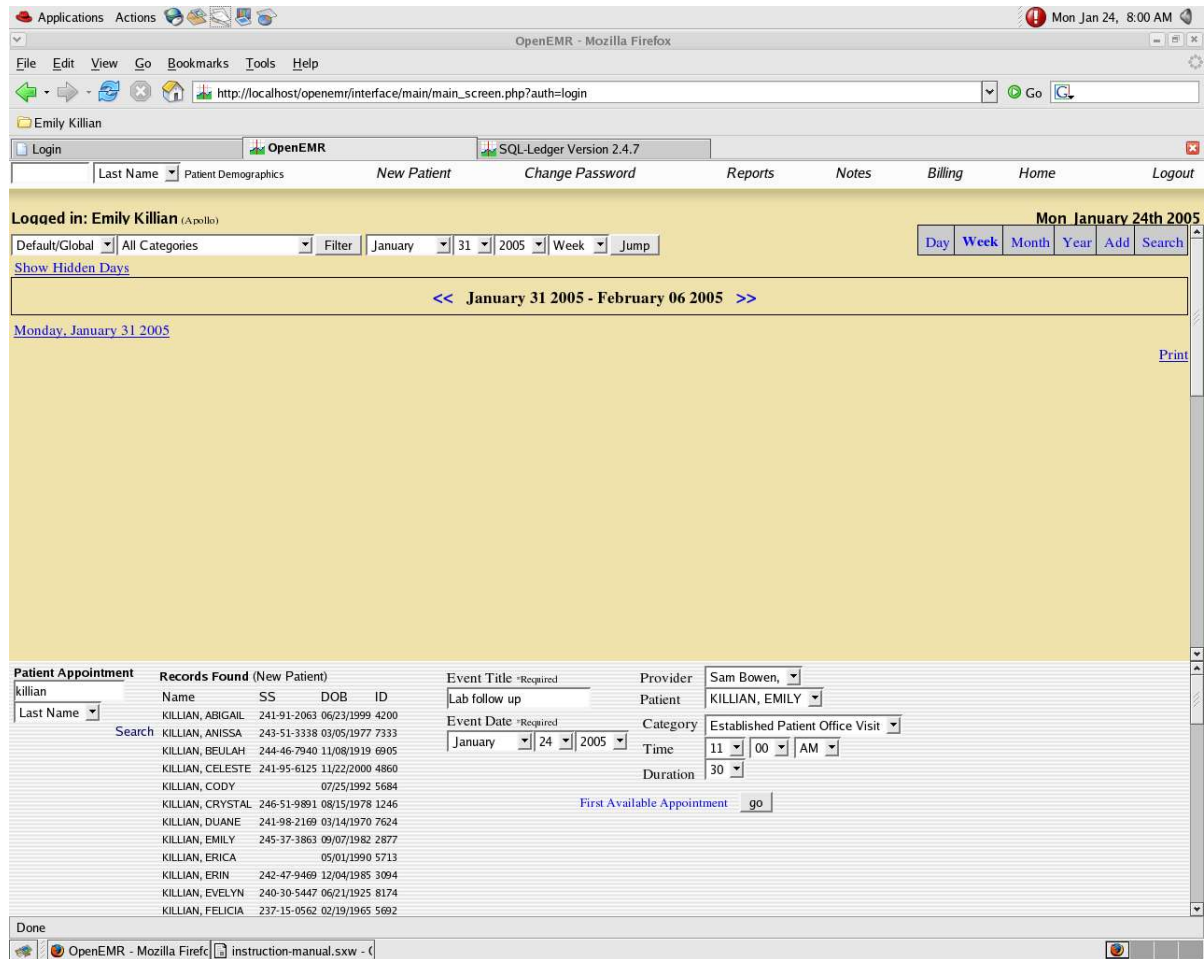


Illustration 5

The appointment scheduler is used to keep track of when patients are scheduled to come into the office to be seen. It helps practitioners know who is coming in on a particular day and time.

Adding an appointment from the calendar

Click on the + sign beside the time chosen for the appointment.

Fill in the appointment details and the patient's name and provider and click go. A message stating the event has been submitted should be visible at the top of the screen.

Please see following screenshot.

OpenEMR Users Guide

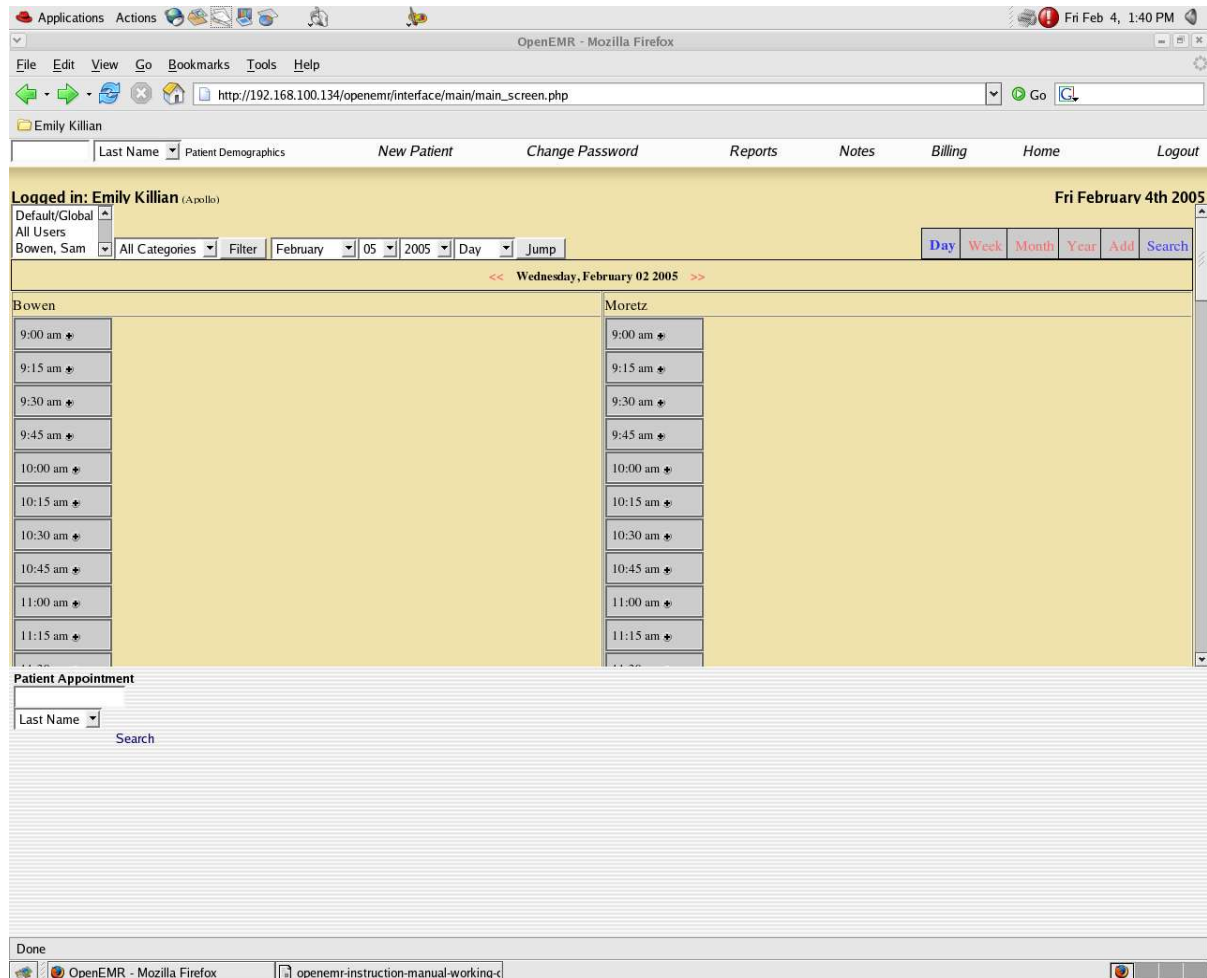


Illustration 6

Appointments can be set directly from the appointment scheduler by clicking on the + button beside the desired time.

Editing an appointment that has already been made

From the main screen, enter the patient's last name, identification number, social security number or date of birth in the input box located at the top of the screen. Select the criteria you chose for the search and click on find. This will bring up the patient summary screen. Click on the appointment type. Click edit, then make your changes and click go.

If the appointment is already displayed on the main screen, click on the appointment description and go through the above process.

Once you have clicked go, a note should appear at the top of the screen that says the appointment has been modified.

To view only one practitioner's schedule at a time

To view only one practitioner's schedule, click on that practitioner's name from the drop down list and click jump.

OpenEMR Users Guide

Moving from one calendar view to another (day, week, month or year)

From the main screen, click on the view you would like to see. This can either be day, week, month or year and is located at the right-hand side of the page.

Double booking

Book the appointment like normal. The program will pop up an alert message about double booking. Click go a second time to approve the double booked appointment.

This only works correctly if it is a new appointment instead of a rescheduled one.

The words double booked should appear on the appointment.

Please see following screenshot.

The screenshot displays the OpenEMR web application in a Mozilla Firefox browser. The top navigation bar includes links for 'Login', 'OpenEMR', 'SQL-Ledger Version 2.4.7', and various user options like 'Last Name', 'Patient Demographics', 'New Patient', 'Change Password', 'Reports', 'Notes', 'Billing', 'Home', and 'Logout'. The main content area shows a calendar for 'Thursday, January 27 2005'. The calendar grid has columns for 'Time', 'Sam Bowen', '1 1', 'd d', 'S S', and '1 1'. Appointments are listed for 2:30 PM (MACE FRANK, provider Sam Bowen) and 3:00 PM (CALDWELL ANTHONY, provider Sam Bowen). A message box in the bottom right corner states: 'There are errors with your submission. These are outlined below. Event Collides with: Walk-in at 3:00 pm. Submit again to "Double Book" To change values click back in your browser.' Below the calendar, there is a 'Patient Appointment' section with a search bar and a list of patients. At the bottom, there is a form for adding a new patient with fields for 'Event Title', 'Provider', 'Patient', 'Event Date', and 'Category'.

Illustration 7

Double booking is generally frowned upon, but is sometimes necessary. Open EMR flags double booked appointments and prompts users to change those that are double booked.

Blocking out time for drug lunches and providers' days off

Enter the time like a regular appointment and edit it like a regular appointment. The only exception is when a patient's name would normally be selected from the drop

down menu, click on none specified.

Deleting scheduled appointments

Click on the appointment description. Click on delete. At the top of the page, click on yes to delete the appointment. Click jump to return to the appointment scheduler.

Printing schedules

From the main screen, click on the date you want to print. This will bring up a list of appointments. Click print at the bottom right-hand corner of the schedule box. This will bring up a single-page list. Print like a normal Internet document. Close the list's window.

PATIENT ENCOUNTERS

Entering a new encounter from the appointment scheduler

From the main screen, patient appointments are listed in boxes. Each scheduled appointment has a button that looks like an arrow that is pointing downward.

Clicking that button will take you to the new patient encounter form, where the patient's reason for being seen can be entered in the input box. Once that is typed, click to save.

Please see following screenshot.

OpenEMR Users Guide

Applications Actions OpenEMR - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

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

Go

Emily Killian

Login OpenEMR SQL-Ledger Version 2.4.7

Last Name Patient Demographics New Patient Change Password Reports Notes Billing Home Logout

Logged in: Emily Killian (Apollo) Mon January 24th 2005

Default/Global All Categories Filter January 27 2005 Day Jump Day Week Month Year Add Search

<< Thursday, January 27 2005 >>

Person	Category	Title	Length
02:30 PM Sam Bowen	Established Patient Office Visit	Protime	(0:30)
03:00 PM Sam Bowen	Established Patient Office Visit	DOUBLE BOOKED Medication refills	(0:45)
03:00 PM Sam Bowen	Established Patient Office Visit	Walk-in	(0:30)

Print

Patient Appointment killian

Records Found (New Patient)

Name SS DOB ID

Search

KILLIAN, ABIGAIL 241-91-2063 06/23/1999 4200

KILLIAN, ANISSA 243-51-3338 03/05/1977 7333

KILLIAN, BEULAH 244-46-7940 11/08/1919 6905

KILLIAN, CELESTE 241-95-6125 11/22/2000 4860

KILLIAN, CODY 07/25/1992 5684

KILLIAN, CRYSTAL 246-51-9891 08/15/1978 1246

KILLIAN, DUANE 241-98-2169 03/14/1970 7624

KILLIAN, EMILY 245-37-3863 09/07/1982 2877

KILLIAN, ERICA 05/01/1990 5713

KILLIAN, ERIN 242-47-9469 12/04/1985 3094

KILLIAN, EVELYN 240-30-5447 06/21/1925 8174

KILLIAN, FELICIA 237-15-0562 02/19/1965 5692

Done

OpenEMR - Mozilla Firefox instruction-manual.sxw

Illustration 8

Entering a new patient encounter is one of the first things office staff works on when a patient arrives. This information is then used by the practitioner who will see the patient.

Entering a new encounter from the patient's summary screen

Click on encounter located at the top of the page. Click on new patient encounter and type the patient's reason for being seen in the input box. Once that is typed, click save.

Please see following screenshot.

OpenEMR Users Guide

The screenshot shows the OpenEMR interface in a Mozilla Firefox browser window. The address bar shows the URL: `http://localhost/openemr/interface/patient_file/patient_file.php?set_pid=2877`. The browser title is "OpenEMR - Mozilla Firefox". The page has a navigation bar with tabs: "Login", "OpenEMR", and "SQL-Ledger Version 2.4.7". Below the navigation bar is a summary bar with tabs: "Summary", "History", "Encounter", "Transaction", "Documents", "Report", and "Close". The main content area is titled "EMILY KILLIAN (Age 23 ID 2877) Loaded in as: Emily Killian (Apollo)". The "Demographics" section is expanded, showing patient information: Name: Ms. EMILY R KILLIAN, DOB: 09/07/1982, Sex: Female, S.S.: 245-37-3863, Number: 2877, Address: 602 SOUTH WASHINGTON ST. APT. 5, SHELBY, NC 28150, Emergency Contact: Work: (704) 484-7000, Mobile: (704) 472-9699, Email: emilykillian@yahoo.com, Marital Status: single, Occupation: Reporter, Employer: The Shelby Star, Employer Address: PO BOX 48, Shelby, NC 28152, Race/Ethnicity: Caucasian, Language: English, Family Size: lives alone, Primary Insurance Provider: Blue Cross Blue Shield of North Carolina, Policy Number: Subscriber: S.S.: D.O.B.: 00/00/0000, Phone: Subscriber Address: Subscriber Employer: Financial Review Date: 8/21/2004. A "New Appointment" box is visible on the right, showing "Thursday, January 27 2005" and "03:00 PM DOUBLE BOOKED Medication refills (0:45) patient KILLIAN,EMILY (age 23)(pid 2877) provider Sam Bowen". Below the demographics section are tabs for "Medications", "Allergies", "Immunizations", "Prescriptions", and "Patient Notes". The "Medications" tab is selected, showing "No chronic meds". The "Patient Notes" tab is also visible. The bottom of the browser window shows the taskbar with "Done", "OpenEMR - Mozilla Firefox", and "instruction-manual.sxw".

Illustration 9

Entering a new patient encounter is one of the first things office staff works on when a patient arrives. This information is then used by the practitioner who will see the patient.

Entering vital signs

Once the new patient encounter form is finished, click on vital signs from the menu on the right rail.

Type in the patient's vital signs in the appropriate input boxes and click save.
Please see following screenshot.

OpenEMR Users Guide

Applications Actions Mon Jan 24, 8:14 AM

OpenEMR - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://localhost/openemr/interface/patient_file/patient_file.php?set_pid=2877

Emily Killian

Login OpenEMR SQL-Ledger Version 2.4.7

Summary History Encounter Transaction Documents Report Close

EMILY KILLIAN Loaded in as: Emily Killian (Archie) Encounter: (Today) Mon January 24th 2005

Vital Signs

Blood Pressure

Standing: Sitting: Supine: Systolic: Diastolic:

Heart Rate (Beats/Minute): Respiration (Breaths/Minute):

Temperature: (C) (F) Temperature Method:

Height (Feet): Height (Inches): Height (Centimeters):

Weight (Lbs): Weight (Ozs): Weight (Kgs):

Body Mass Index: Figure Shape (If Overweight):

Additional Notes:

[Save] [Don't Save]

Done

OpenEMR - Mozilla Firefox instruction-manual.sxw

Illustration 10

Vital signs are used by practitioners who assess the patient.

Entering additional patient notes

For patient phone calls and refills, bring up the patient's summary page.

Click on patient notes, located on the right rail, and enter the note in the input box. Click add new note. To view only active or inactive notes, click on your viewing preference under the input box.

PATIENT MEDICAL DATA

Updating medical problems list

Click on medical problems along the bottom rail. To add a problem, click in the top input box. Extra notes can be added in the bottom input box. Click on add new medical problem. When finished, click back or close.

Please see following screenshot.

OpenEMR Users Guide

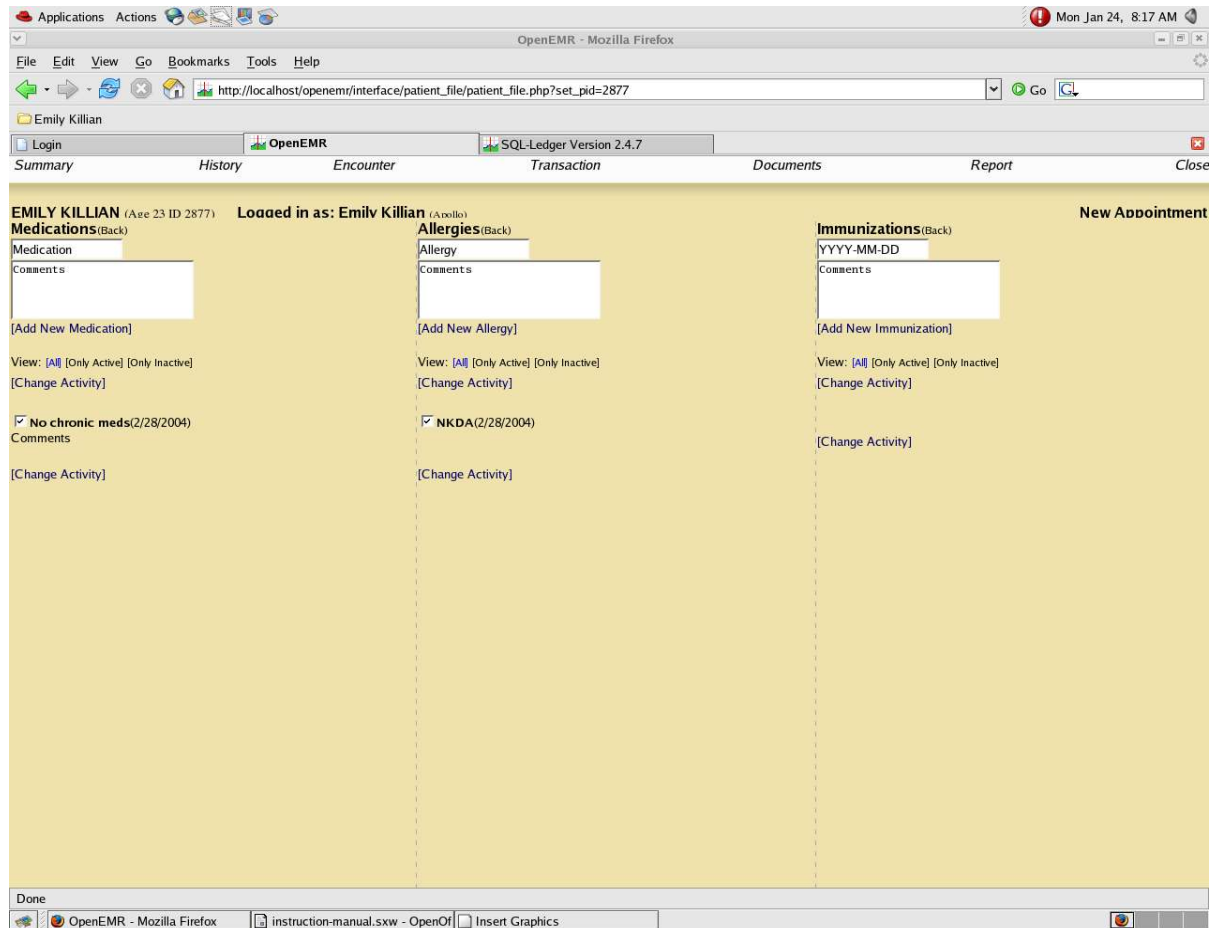


Illustration 11

Keeping problem lists and medication lists updates is crucial because it helps practitioners determine what medications to prescribe and what treatments a patient might need.

Updating medications list

Click on medications along the bottom rail. To add a medication, click in the top input box. The medication name should go in the top box and additional information should go in the bottom box. Click on add new medication to save. When finished, click back or close.

Please see previous screenshot.

Updating allergies list

Click on allergies along the bottom rail. To add an allergy, click in the top input box. Extra notes can be added in the bottom input box. Click on add new allergy. When finished, click back or close.

Please see previous screenshot.

Updating surgeries list

Click on surgeries along the bottom rail. To add a surgery, click in the top input box. Extra notes can be added in the bottom input box. Click on add new surgery.

When finished, click back or close.

Please see previous screenshot.

Updating immunizations list

Click on immunizations along the bottom rail. To add an immunization, click in the top input box. Extra notes can be added in the bottom input box. Click on add new immunization. When finished, click back or close.

Please see previous screenshot.

BILLING, INSURANCE, PAYMENTS AND ACCOUNTS RECEIVABLE

Adding a CPT code

To add a CPT code, click on superbill at the bottom of the screen. Fill in the blanks by choosing the type of code to add and by typing in the numerical code.

Modifiers may need to be used for certain CPT codes.

Enter the number of units or days, which typically is only one. Hospital visits and lesion destructions may have more days/units.

Enter the fee charged for the service and from the next drop down menu choose to include the code on the superbill. Click on add code.

Please see following screenshot.

OpenEMR Users Guide

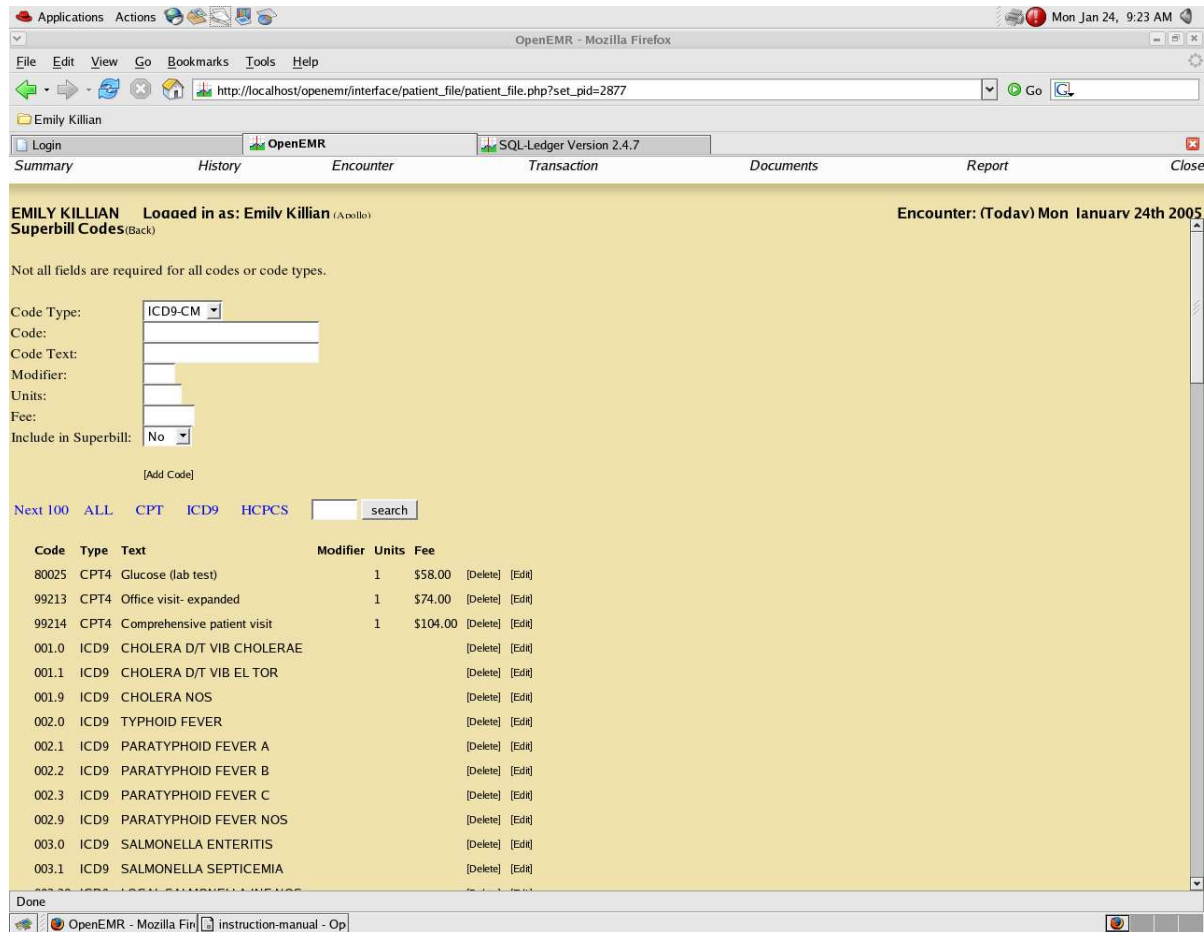


Illustration 12

Maintaining CPT and ICD-9 codes is necessary for the proper billing of patients and their insurance companies.

Deleting an ICD-9 code from a patient's encounter

After an ICD-9 code has been entered and it's unwanted, click on the code under the billing column. Then click delete to eliminate it.

This will not permanently delete the code from the main list.

Entering copays

Copays can be entered by clicking on copay in the bottom left rail. In the copay column, type in the patient's copay and click save. The copay amount will move automatically to the superbill column.

Please see following screenshot.

OpenEMR Users Guide

The screenshot shows the OpenEMR web interface in a Mozilla Firefox browser window. The address bar displays the URL: `http://localhost/openemr/interface/patient_file/patient_file.php?set_pid=2877`. The browser's title bar reads "OpenEMR - Mozilla Firefox".

At the top, there is a navigation bar with tabs: **Summary**, **History**, **Encounter**, **Transaction**, **Documents**, **Report**, and **Close**. The **Summary** tab is currently selected.

The main content area is titled "EMILY KILLIAN" and "Loaded in as: Emily Killian (Accollo)". Below this, it says "This Encounter for EMILY KILLIAN:". The patient's information is displayed in a table-like format:

Emily Killian	Evaluation Form	temp: 98.9	p: 65	r: 14	bp: 120/80	ht: 5'3"	complaint: Medication refills
		hpi: Emily requests a refill on her allergy medicine. She is currently taking Zyrtec whenever her allergies start bothering her.					
		assessment: Wrote refills for six months on her Zyrtec.					
Emily Killian	New Patient Encounter	reason: Medication refills		facility: Bowen Primary & Urgent Care, P.A.			

On the right side, there is a section titled "Encounter: (Today) Mon January 24th 2005" and "New Form". Below this, a list of forms is displayed:

- Adult Progress Note
- Ankle Evaluation Form
- Bronchitis Form
- Contacts
- documents
- Evaluation Form
- Head Pain TJE Form
- Hearing Test
- Keratometry
- Lab Results
- Neurological Review
- New Encounter Form
- Obstetrical Form
- Pain Evaluation
- Phone Exam
- Other Authorization Form

At the bottom of the main content area, there are three sections: "Coding/Billing", "Copay", and "Billing (More)".

- Coding/Billing:** Includes links for "Superbill", "ICD-9-CM Search", "CPT Search", "HCPCS Search", "Copay", and "Other".
- Copay:** Shows a text input field with the value "\$15" and a "Save" button.
- Billing (More):** Includes a "Justify" button and a list of codes: "CPT4 99213 Office Visit- Expanded (473.9)" and "ICD9 473.9 Chronic Sinusitis Nos".

At the bottom of the browser window, the taskbar shows the "Done" button and the "instruction-manual.sxw" file.

Illustration 13

Once a copay is entered, it will be moved automatically to the superbill column.

Entering charges

Entering charges can be done by clicking on superbill in the left column. Then click on more. Add the CPT code (covered under Adding a CPT code) if it is not already on the code list. Click on the code you wish to charge. Add any necessary modifiers and the number of units or days for each procedure. The service's fee should already be entered. Choose to include the charge on the superbill.

Please see following screenshot.

OpenEMR Users Guide

The screenshot shows the OpenEMR web application running in a Mozilla Firefox browser. The address bar displays the URL: `http://localhost/openemr/interface/patient_file/patient_file.php?set_pid=2877`. The top navigation bar includes links for Login, OpenEMR, SQL-Ledger Version 2.4.7, Documents, Report, and Close. The main content area is divided into several sections:

- Patient Information:** EMILY KILLIAN, Loaded in as: Emily Killian (Archie). This Encounter for EMILY KILLIAN: Emily Killian New Patient Encounter. reason: Medication refills. facility: Bowen Primary & Urgent Care, P.A.
- Encounter:** (Today) Mon January 24th 2005. New Form.
- ICD-9-CM Codes:** A list of codes including 461.0 Ac Maxillary Sinusitis, 461.1 Ac Frontal Sinusitis, 461.2 Ac Ethmoidal Sinusitis, 461.3 Ac Sphenoidal Sinusitis, 461.8 Other Acute Sinusitis, 461.9 Acute Sinusitis Nos, 473.0 Chr Maxillary Sinusitis, 473.1 Chr Frontal Sinusitis, 473.2 Chr Ethmoidal Sinusitis, 473.3 Chr Sphenoidal Sinusitis, 473.8 Chronic Sinusitis Nec, and 473.9 Chronic Sinusitis Nos.
- Billing:** A section with a search bar and a list of codes including CPT4 99213 Office Visit- Expanded and ICD9 473.9 Chronic Sinusitis Nos.

Illustration 14

Once charges and diagnosis codes are entered, the charges are sent for billing.

Deleting a CPT code that has been entered in the charges

An unwanted CPT code can be deleted from the charges by clicking on it under the billing column. Click delete and then click on billing to go back to the previous screen.

REPORTING

Creating reports

From the patient's summary screen, click on report at the top rail. Choose the patient information that should be included by checking the boxes beside desired information. After making selections, click on generate report.

Please see following screenshot.

OpenEMR Users Guide

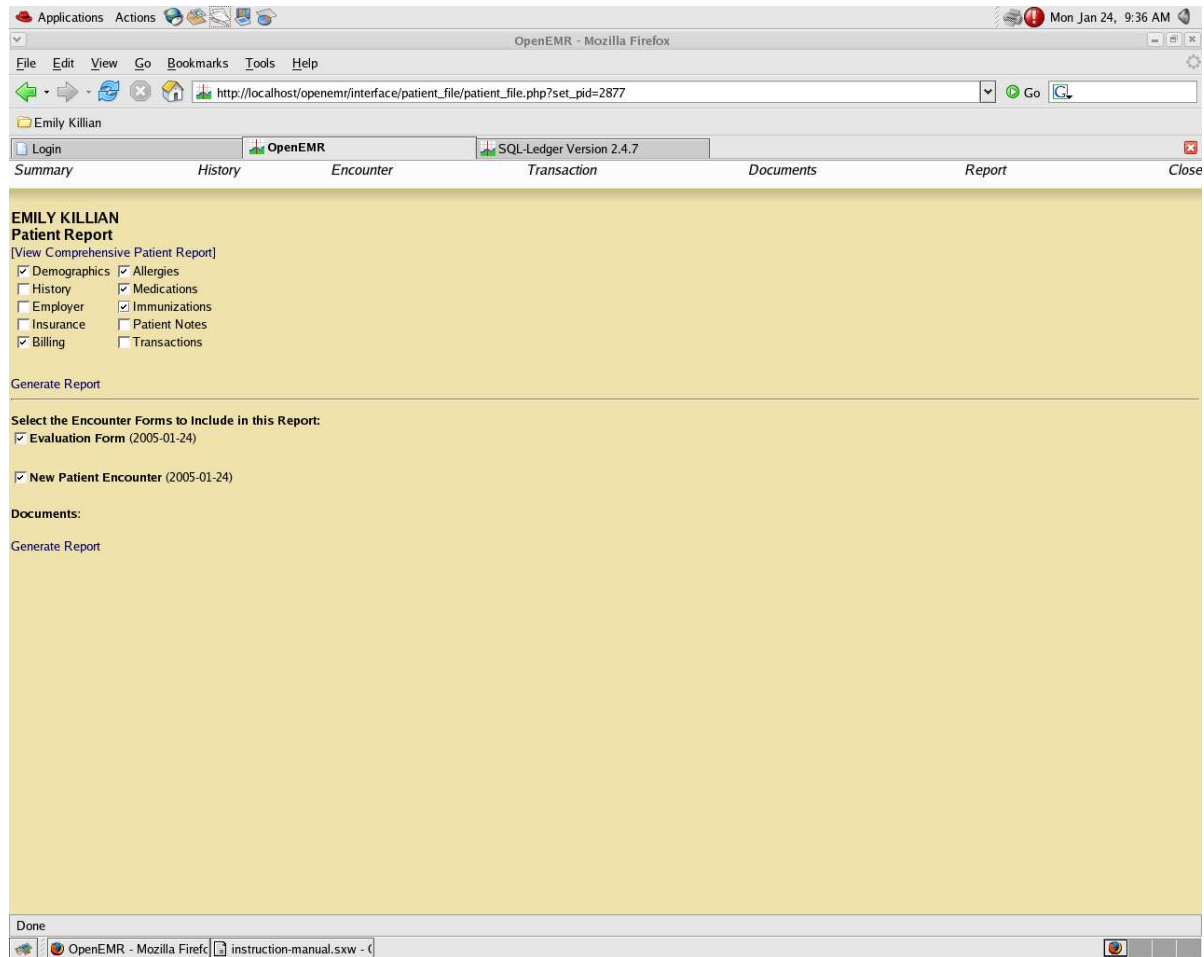


Illustration 15

Reports are used to maintain patient records and to send copies of documents with patients and also to other offices. An example of a report would be a school or work note, or a problem list that is printed to go with a patient to an appointment at another physician's office.

Printing reports

After generating a report, click on printable version. Print the document and close the print window.

Work and school notes

To create a work or school note that relates to a specific visit, go into the patient's account and click on encounter. Choose the correct date of service from the list and under the new form column, choose work/school note.

From the drop down menu, choose whether it will be a work or school note. Personalized messages about the patient's absence can be added in the input box for messages.

Choose the correct provider from the drop down list and hit save.

Once the note has been saved, click on printable view and print the note. Make sure to send the document to the correct printer.

PRESCRIPTIONS

Writing prescriptions

From the patient's encounter screen, choose an encounter by clicking on it. On the left rail, click on add prescription. Fill in the date the patient should start taking the medication, provider, drug name, quantity, units, directions and refills. Once the prescription is finished, click on prescribe. Then print, e-mail, fax or auto send the prescription to the pharmacy.

Please see following screenshot.

The screenshot shows the OpenEMR interface in a Mozilla Firefox browser window. The address bar displays the URL: `http://localhost/openemr/interface/patient_file/patient_file.php?set_pid=2877`. The browser window has tabs for 'OpenEMR' and 'SQL-Ledger Version 2.4.7'. The main content area is titled 'EMILY KILLIAN' and 'Loaded in as: Emily Killian (Arrollo)'. The encounter date is 'Mon January 24th 2005'. The form includes fields for 'temp: 98.9', 'p: 65', 'r: bp: 14', and 'ht: 53'. The 'complaint' field is 'Medication refills'. The 'hpi' field contains a detailed history of present illness. The 'assessment' field contains 'Wrote refills for six months on her Zyrtec'. The 'reason' field is 'Medication refills' and the 'facility' is 'Bowen Primary & Urgent Care, P.A.'. The 'Prescriptions' section is active, showing a list of prescriptions and a 'Prescribe' button. The 'Prescriptions' list includes 'CPT4 99213 Office Visit- Expanded (473.9)' and 'ICD9 473.9 Chronic Sinusitis Nos'. The 'Prescribe' button is located at the bottom of the form.

Illustration 16

Prescriptions can be printed, e-mailed or faxed to pharmacies.

Printing and sending prescriptions

After adding the prescription information, click on prescribe. Then either click print, e-mail or fax. To e-mail or fax, type in the number or address and click on the method that should be used to send the prescription. To automatically send the prescription via the pharmacy's preferred method, click auto send.

OpenEMR Users Guide

Looking up medications

Click on drug lookup. The program will pop up a dialog box. Type the name of the medication in the box and click search. The box will bring up a list of possible matches. Choose the medication from the list and click select. The box will close automatically and the drug name will appear on the prescription.

Please see following screenshot.

The screenshot shows the OpenEMR web interface in a Mozilla Firefox browser. The address bar shows the URL: `http://localhost/openemr/interface/patient_file/patient_file.php?set_pid=2877`. The page title is "OpenEMR - Mozilla Firefox". The interface has a top navigation bar with tabs: Summary, History, Encounter, Transaction, Documents, Report, and Close. The main content area is titled "EMILY KILLIAN" and "Loaded in as: Emily Killian (Apollo)". It displays patient information, including name, date of birth, and medical history. A "Drug Lookup" dialog box is open, showing a search for "Allegra (FEXOFENADINE)". The bottom section contains "Coding/Billing" and "Prescriptions" tabs. The "Billing" section shows CPT4 and ICD9 codes.

Illustration 17

Looking up medications is important because it helps the practitioner identify the proper medication to prescribe and because it identifies potential generic drugs.

Adding pharmacies

From the patient's summary screen, click on demographics. Then click on add new insurer under any of the insurance categories. Click on add a pharmacy.

Fill out the pharmacy name, address, e-mail and phone and fax numbers. Choose the default method that should be used to send prescriptions to this pharmacy. Click update. To auto send, click on the correct pharmacy from the drop down menu.

An administrator can also add pharmacies by clicking on administration and

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then practice settings. Click on add a pharmacy and complete the input boxes. Click update, then click on pharmacies to check.

Please see following screenshot.

The screenshot shows the OpenEMR web application running in a Mozilla Firefox browser. The address bar displays `http://localhost/openemr/interface/usergroup/usergroup.php`. The user is logged in as Sam Bowen on Monday, January 24th, 2005. The navigation menu includes [Users & Groups](#), [Forms Settings](#), [Practice Settings](#), [Calendar Settings](#), [Database Reporting](#), [View Logs](#), and [Back](#). The 'Settings' section is active, showing a sidebar with links: [Pharmacies](#), [Add a Pharmacy](#), [Insurance Companies](#), [Add a Company](#), [Insurance Numbers](#), [X12 Partners](#), [Documents](#), and [Edit Categories](#). The main content area contains a form for adding a pharmacy with fields for Name, Address, City, State, Zip, Email, Phone, Fax, and a Default Method dropdown (set to Print). An 'Update' button is at the bottom. The status bar at the bottom shows 'Done' and open files: 'OpenEMR - Mozilla Firef' and 'instruction-manual.sxw'.

Illustration 18

Maintaining an accurate record of pharmacies comes into play when a practitioner creates a prescription for a patient.

Changing pharmacy information

From a patient's summary page, click on demographics. Click on add new insurer from any of the insurance categories. Click on pharmacies. Click on the name of the pharmacy and click update.

This can also be done through administration.

Please see previous screenshot.

AUTHORIZED USERS

Authorized users can perform additional functions that normal users cannot. These include approving office notes and billing. A provider's main screen will include his or her schedule of appointments and billing and office notes that need to be authorized.

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Authorized users also have access to administrative tasks, along with practice and calendar settings and forms.

Authorizing office visits and notes

On the bottom rail, click authorize, which is located underneath the patient's name. This will clear the name and the transactions from the rail.

Please see following screenshot.

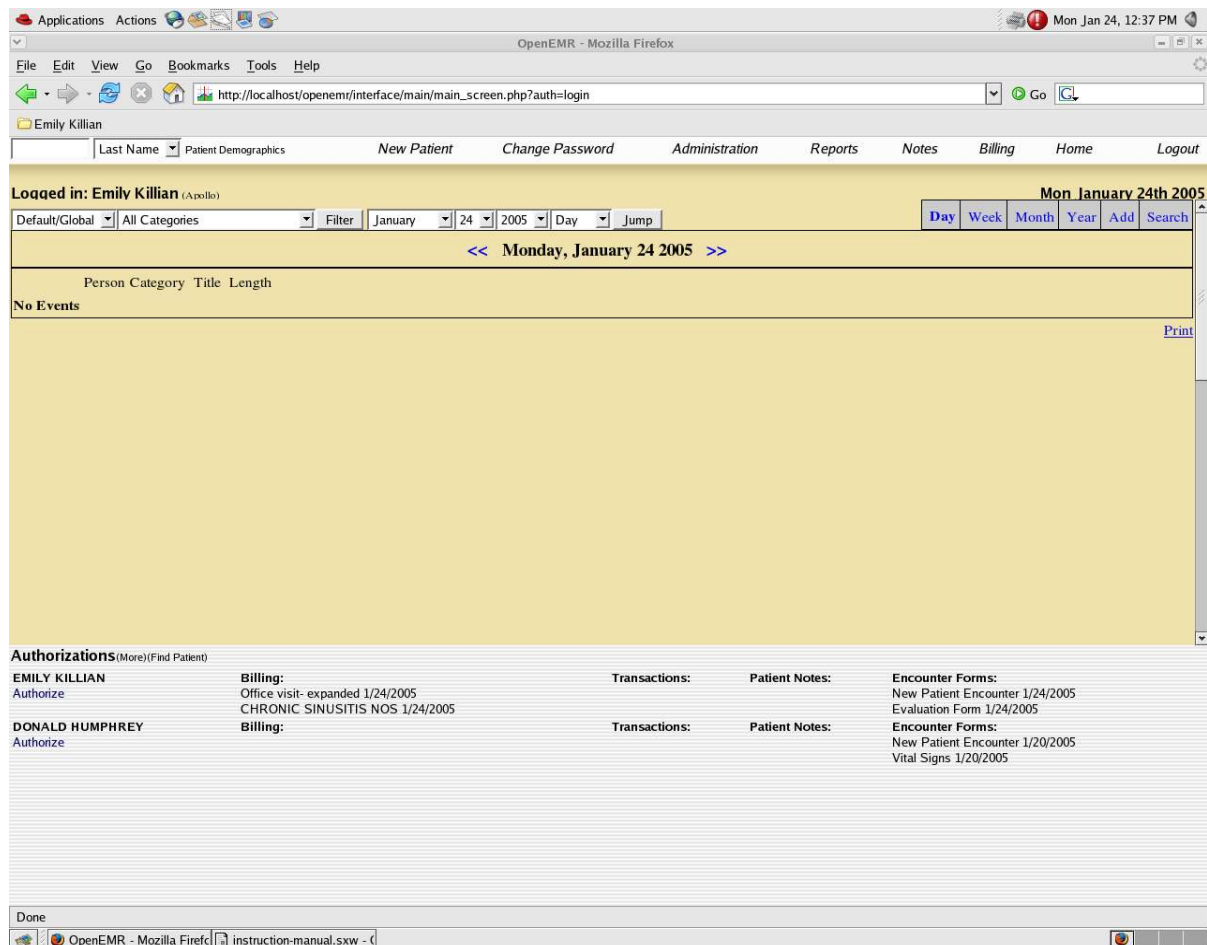


Illustration 19

Once an office visit is authorized, it can be sent for billing.

Generating reports

Authorized users can generate reports on race, no shows, appointments and codes, among others.

To generate a report, choose the report type and the variables, then choose how many results to show and click go.

Add a new user

Click on administration at the top rail. Fill in the new user information and click on add user.

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Please see following screenshot.

Applications Actions OpenEMR - Mozilla Firefox Mon Jan 24, 12:39 PM

File Edit View Go Bookmarks Tools Help

http://localhost/openemr/interface/usergroup/usergroup.php Go

Emily Killian

Users & Groups Forms Settings Practice Settings Calendar Settings Database Reporting View Logs Back

Logged in: Emily Killian
User & Group Administration Mon January 24th 2005

New Facility Information:

Name: Phone: Address: City: State: Zip Code: Country: Federal EIN: Add Facility

Edit Facilities:

Bowen Primary & Urgent Care, P.A. (Edit)

New User:

Username: Password: Groupname: Apollo Authorized: First Name: Middle Name: Last Name: Default Facility: Bowen Primary & Urgent Care, P.A. Federal Tax ID: Federal Drug ID: Additional Info: Add User

New Group:

Groupname: Initial User: drbowen Add Group

Add User To Group:

User: drbowen Groupname: Apollo Add User To Group

Username	Real Name	Info	Authorized?
drbowen(Edit)	Sam Bowen		yes
emilyk(Edit)	Emily Killian		yes

Apollo

drbowen(Remove), Erink(Remove), angelag(Remove), missy(Remove), connie(Remove), beckyb(Remove), kims(Remove), joym(Remove), liseh(Remove), Lcalloway(Remove), KEdmiston(Remove), tammyp(Remove), ashade(Remove), mandyl(Remove), LisaK(Remove), rebeccam(Remove), emilyk(Remove), dhice(Remove), lorik(Remove), cholsclaw(Remove), pmorgante(Remove), lsmith(Remove), pburchette(Remove), Erink(Remove), nikolai(Remove), dcroy(Remove), jhldebran(Remove), angelag(Remove), jbryant(Remove), cwilson(Remove), therman(Remove)

Done

OpenEMR - Mozilla Firefox instruction-manual.sxw - C

Illustration 20

All Open EMR users for a facility should be entered in. Changes and additions are tracked by user name.

Add new groups

Click on administration at the top rail. Fill in the new group information and click on add group.

Please see previous screenshot.

Add new facilities

Click on administration at the top rail. Fill in the new facility information and click on add facility.

Please see previous screenshot.

Printing schedules

From the provider's main screen, click on print, which is located at the bottom, right-hand corner of the practitioner's schedule. This will bring up a printable page. Print the page like a normal document.

Adding an appointment category

Click on administration and then on calendar settings. Click on categories. Scroll down the list that comes up to make sure the category you want to add is not already on the list.

If not, then scroll back up to the top of the list and begin entering in the category title. Click on pick to bring up a box with colors you can select for the background. Select a color that has not been chosen before. You may enter in a description of the category.

Click commit changes and then click yes to confirm.

Please see following screenshot.

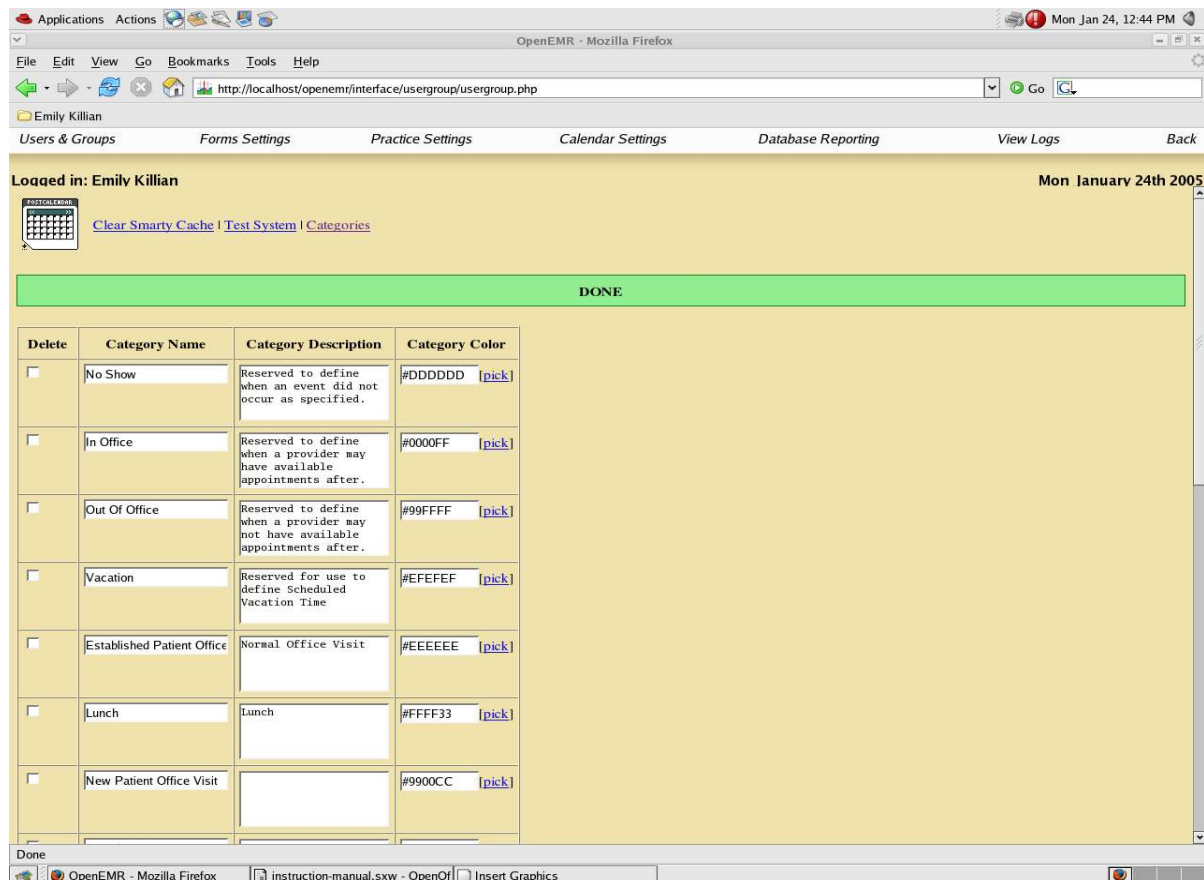


Illustration 21

Appointment categories are used to sort appointments by type. They help keep the appointment scheduler organized.

TRANSACTIONS

Entering a referral or forms information

After filling out a form for a patient or making a referral appointment, from his or her summary screen, click on transaction.

Choose the type of transaction from the drop down menu. Type details about the form and what we filled out in the input box.

Then click on add new transaction.

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Please see following screenshot.

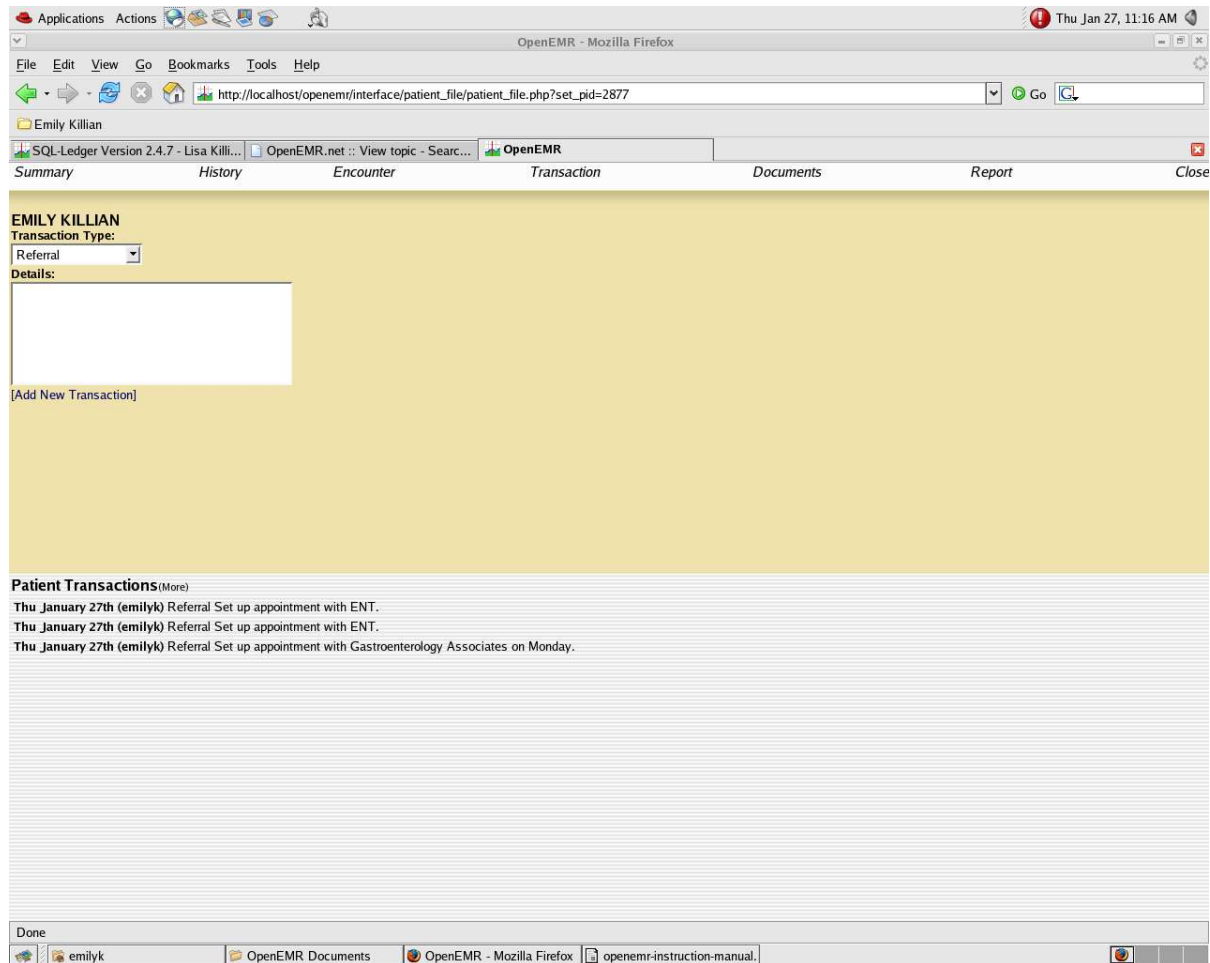


Illustration 22

Transactions like making appointments at other offices via referrals are done from the patient's transaction screen.

UPCOMG ADDITIONS AND CHANGES TO THE MANUAL:

Forms- managing, creating and using them

Practice settings- insurance numbers/x12 partners/hl7

Viewing logs

Changing appointment categories and setting appointment limits

Searching for first available appointments

Making a referral- under transactions

Modifying or deleting a CPT code, ddding, deleting and modifying an ICD-9 code

Deleting a CPT code and ICD-9 code from an encounter

In-house laboratory and radiology and managing documents

Querying/reports

Documents

insurance filing and tracking, lab interface /X12 HL7

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