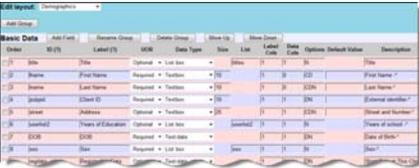
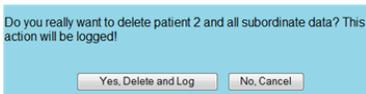
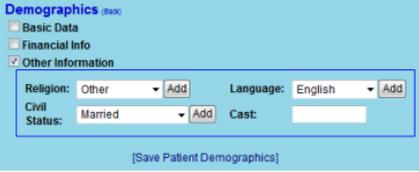
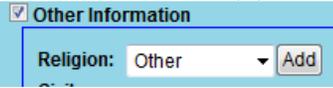


ROLES: DATA CLERK / COUNSELLOR / RECEPTIONIST PROCESS 2.1.0: UPDATING CLIENT PROFILE DATA

#	Step	Observations	Menu options or screen information
0	<p><b>Preliminary steps:</b> It is required that a Demographic Layout is properly defined and created when the system is first configured (this is a one-time administration task just after installing OpenEMR) See Guide on Layouts.</p> <p>In addition, before updating the client socio-demographic profile, a client record must be created and/or found in the system (you need an 'active' client, whose profile will be displayed on the Top part of your screen)</p>	<p>Administration of the demographic layout:</p>  <p>Hint: Use Client &gt; Management &gt; Current to display the active client's demographic profile</p>	<p>Creating or selecting an active client:</p>  <p>Finding an existing client:</p> 
1	<p><b>Updating demographic Data</b> Select the blue link <b>Demographics (More)</b> to open the client demographic record. Update client data by filling out or updating (overwriting) data contained in data fields. The first time, this profile will display data in the key fields entered when creating the client record (name, last name, sex, DOB) only</p>		
8	<p><b>Deleting a client record</b> By selecting the red link <b>(Delete)</b> a client record may be permanently eliminated from the data base. A warning message will be displayed. Do not use this option if client has any related data (eg. visit data, payments, etc.)</p>		 <p>Note: Only users with administrator access rights can Delete a client record (i.e. users without this access level will not see the <b>(Delete)</b> link.</p>
6	<p><b>Select the appropriate data section</b> Mark the appropriate tick box to open the demographics section you want to update.</p> <p>Unmarking tick boxes collapse the corresponding sections for a cleaner view of this data entry screen.</p>		<p>Tick box marked (<input checked="" type="checkbox"/>)</p> 
7	<p><b>Saving updated data</b> Select the link located at the bottom of the screen to save changes.</p>		
8	<p><b>Note: Special warnings</b></p> <ul style="list-style-type: none"> <li>OpenEMR displays <b>red</b> warnings next to some key data fields (eg. <b>Fix this!</b>) to indicate you need to take some action</li> <li>Some Fields are defined as mandatory and their labels are highlighted in a different <b>color</b>. You must enter a value in these before saving the updated data. (This characteristic is defined as part of the Demographic layout)</li> <li>If a mandatory field is missing, OpenEMR will show a warning message indicating the need to complete the corresponding data field.</li> </ul>		 