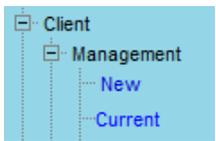
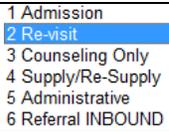
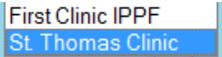
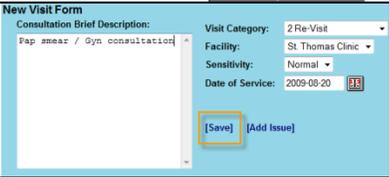
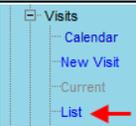
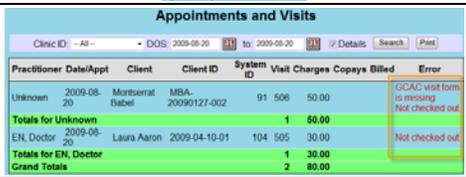


PROCESS DESCRIPTION - VERSION 4.0 (June 2010)

POSSIBLE ROLES: RECEPTIONIST / CASHIER / COUNSELLOR | PROCESS 1.3.0: CREATING A VISIT

#	Step	Observations	Menu options or screen information															
0	Preliminary steps: A visit is <u>always</u> associated to an existing ACTIVE OpenEMR client record, so first <u>Find</u> an existing client record (Guide 1.2.0) or create a new OpenEMR record (Guide 1.1.0)	<b>Note:</b> The process described here focuses on the <b>Visit Form</b> and corresponds to the event in which a client goes to the clinic and receives one or more services/products. This is not to be confused with the <b>Visit as a whole</b> , which includes the creation of this form, a Tally Sheet (serv/prod control), the Checkout (billing process), and optional Visit Forms (to collect especial additional data)																
1	In order to create a new visit, select <b>Menu options:</b> Client > Visits > New Visit  A New Visit Form is displayed	<b>New Visit Form</b> Consultation Brief Description:																
2	<b>Add Consultation Brief Description</b>	Write description (reason of visit) in the open text field																
3	<b>Select Visit Category</b> from pull-down menu	1 Admission: First time client visits clinic 2 Re-visit: Subsequent visit requiring services 3 Counseling Only: (no other service required) 4 Supply/Re-supply: Purchasing products only 5 Administrative: eg. payment, info request 6 Referral INBOUND: Referred from a partner clinic																
4	<b>Select Facility</b> Hint: A 'facility' can be the clinic as a whole or a cost center within a clinic	An appropriate clinic should be pre-defined (The facility is the place/area where the client is assisted; this can also be interpreted as a major cost center within the clinic)																
5	<b>Select Sensitivity</b> (degree of information confidentiality)	High level will block some users from viewing sensitive data, according to configuration settings																
6	<b>Select Date of Service</b> (today's date is the default)	You can type in a different date or use the calendar tool to change today's date if required																
7	<b>Save Visit</b> Hint: in order to streamline the registration process you can leave additional data (forms / issues) to be entered while the client is in consultation or after the he/she has left the clinic /the visit cycle is closed)	<b>Note:</b> Before saving the visit, it is possible (but not mandatory) to add "Issues" (eg. allergies, problems, medication, surgery, etc.) or additional data "Forms" (GCAC, counselling, follow-up) to it. (See corresponding Process Guidelines)																
8	If required, a person with appropriate security rights (Administrator) can Delete the Visit by selecting the <b>(Delete)</b> link.	Deleting a visit is a restricted function, depending on the user's security profile (if you do not see the <b>Delete</b> link, ask your system administrator if needed)																
9	You can return to the Visit page, by selecting the <b>Patient Encounter</b> link, or																	
10	You can view a List of existing visits for the active client, by selecting: Client > Visits > List Hint: there are 2 possible views of the visit list (Billing view and Clinical view)	<b>Past Visits and Documents</b> (To Billing View) <table border="1"> <thead> <tr> <th>Date</th> <th>Issue</th> <th>Reason/Form</th> </tr> </thead> <tbody> <tr> <td>2009-04-23</td> <td></td> <td>test</td> </tr> <tr> <td>2009-02-26</td> <td>Y. penicillin</td> <td>pap smear and consultation general</td> </tr> <tr> <td>2009-02-25</td> <td>Y. penicillin</td> <td>paid in advance for service TL</td> </tr> <tr> <td>2009-02-25</td> <td>Y. penicillin</td> <td>pap smear</td> </tr> </tbody> </table>	Date	Issue	Reason/Form	2009-04-23		test	2009-02-26	Y. penicillin	pap smear and consultation general	2009-02-25	Y. penicillin	paid in advance for service TL	2009-02-25	Y. penicillin	pap smear	
Date	Issue	Reason/Form																
2009-04-23		test																
2009-02-26	Y. penicillin	pap smear and consultation general																
2009-02-25	Y. penicillin	paid in advance for service TL																
2009-02-25	Y. penicillin	pap smear																
11	Hint: A visit cycle is closed when the Tally Sheet has been created and filled out to produce a Client Bill, and the Checkout process is completed. Do not open a new visit for a client if a previous visit is still open. Doing so can be very confusing.	Hint: An important Validation tools is the Appt-Visit Report that can be printed at the end of the day and reflects possible ERRORS such as visits <b>Not Checked Out</b> , which would mean the visit has not been closed properly.																
12	Hint: If you just created the visit but have not completed a Tally sheet, the above Appt-Visit report will not show the error. However you can use the Client> Visit > List option to verify the existence of visits without financial information	Hint: You can always verify (before creating a new visit) whether visits for this client are open in the Visit List, i.e. the Billing columns are empty	