

## PROCESS GUIDELINES AS OF – June 30, 2010 – Version 4.0

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### 1 VISIT CYCLE

- **1.0.0 Summary of Visit Cycle Processes**
- 1.1.0 Creating a new OpenEMR record
  - 1.1.1 Creating a non-duplicate new OpenEMR record
- 1.2.0 Finding an existing OpenEMR record
  - 1.2.1 Advance search for an existing OpenEMR record
- 1.3.0 Creating a new Visit
- 1.4.0 Printing a paper Tally Sheet
- 1.5.0 Completing an electronic Tally Sheet
- 1.6.0 Completing Checkout – Closing the Visit Cycle
- 1.7.0 EOD Reporting/Validation Procedures

### 2 UPDATING THE EMR

- **2.0.0 Summary of EMR Processes**
- 2.1.0 Updating client profile data
- 2.2.0 Updating clinic history data
- 2.3.0 Updating clinic forms
- 2.4.0 Updating clinic issues
- 2.5.0 Updating visit data checks

### 3 APPOINTMENTS

- **3.0.0 Summary of Appointment Processes**
- 3.1.0 Defining Provider Appointment Schedules
- 3.2.0 Creating a new appointment
- 3.3.0 Completing a client appointment

### 4 MANAGING ADMINISTRATIVE PROCESSES

- **4.0.0 Summary of Administrative Processes**
- 4.1.0 Managing Pre-payments
- 4.2.0 Managing Referrals
- 4.3.0 Managing Services
  - 4.3.1 Defining & mapping Services
- 4.4.0 Managing Inventory (Products)
  - 4.4.1 Creating a Service Package
  - 4.4.2 Enhanced Inventory Lot Features
  - 4.4.3 Inventory Reports
- 4.5.0 Diagnostic Laboratory & Orders
  - 4.5.1 Configuration
  - 4.5.2 Patient Results
  - 4.5.3 Batch Results & Lab Reports

### 5 SYSTEM ADMINISTRATION - Integration with external systems

- **5.0.0 Summary of available integration processes**

- 5.1.0 Generating an export file in OpenEMR
- 5.2.0 Importing an OpenEMR file into eIMS
- 5.3.0 Generating aggregated reports in eIMS

## **6 SYSTEM ADMINISTRATION – Customization functions**

- **6.0.0 Summary of Customization functions**
- 6.1.0 Global settings
- 6.2.0 Facilities
- 6.3.0 Users
- 6.4.0 Services
- 6.5.0 Layouts (Using the Layouts function)
  - 6.5.1 Adapting an existing layout (Demographic layout)
  - 6.5.2 Creating/Editing a new layout
- 6.6.0 Lists
  - 6.6.1 Changing an existing list
  - 6.6.2 Layout-based Visit Forms
- 6.7.0 Access Control List (ACL)

## **7 SYSTEM ADMINISTRATION – Advanced functions**

- **7.0.0 Summary of advanced functions**
- 7.1.0 Language
- 7.2.0 Forms
- 7.3.0 Calendar
- 7.4.0 Logs
- 7.5.0 Database

## **8 SYSTEM ADMINISTRATION – Miscellaneous functions**

- **8.0.0 Summary of miscellaneous functions**
- 8.1.0 Client Notes/Auth
- 8.2.0 Fax/Scan
- 8.3.0 Address Book
- 8.4.0 Office Notes
- 8.5.0 BatchCom
- 8.6.0 Password

## **9 REPORTING / INTEGRATION TOOLS**

- **9.0.0 Pentaho – XML Implementation Plan**
- 9.1.0 Pentaho basic concepts, tools & definitions