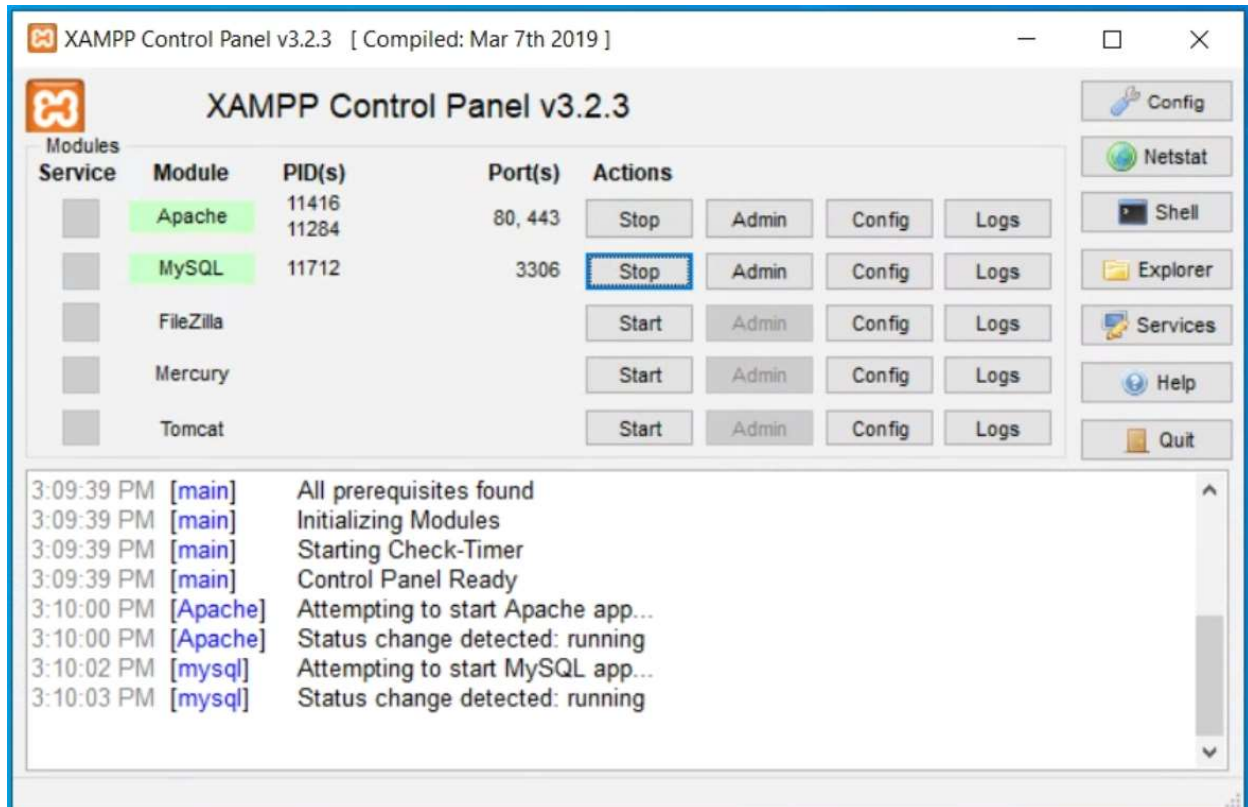


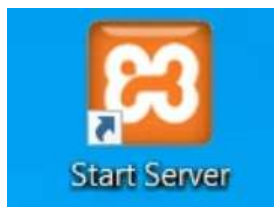
We Health Training  
By Don Bremer

## Starting the Server

You know that the server is running if you see this screen:



If not, double-click the dog bone:



Start Apache first – then MySQL.

## Getting to the server

Every computer that has been given access to the server should be able to type <http://calendar.openemr/> to get the login screen. You must have your own Username and Password to log in.

## Base screen

The screenshot displays the 'Base screen' interface. At the top, there is a navigation bar with tabs: Calendar, Flow Board, Recall Board, Messages, Patient/Client, Fees, Modules, Procedures, Administration, Reports, Miscellaneous, Popsups, and About. The user is logged in as 'Administrator Administrator'. Below the navigation bar, there is a search bar labeled 'Patient: None' and a 'Search by any' field. The main area shows a calendar for 'Tuesday, June 2, 2020'. The calendar is color-coded by timecode and provider. On the left, there is a sidebar with 'Providers' (All Users, Health Clinic, WE Health Clinic) and 'Timecodes' (Doctor, Lab, MN Sure, Patient Education, Ultrasound). On the right, there are buttons for 'Dr. Days current month', 'Dr. Days +1 month', 'Dr. Days +1 year', and a 'Refresh' button. Below these are buttons for 'Day', 'Week', and 'Month'.

### Tabs:

- Calendar
- Flow Board

### Smaller Calendar

### Providers – Just We Health Clinic

### Timecodes – Color Coded depending who needs it

### Upper Right-

- Who is logged on
- Messages you may have

### Buttons to Help with calls:

- Dr. Days current month
- Dr. Days +1 month
- Dr. Days +1 year
- Patient Funding Data
- Refresh/Day/Week/Month

### Then – who is on call that day:

- AB Doctor

- Call Doctor
- Repro Docot
- Staff
- The printer is the call schedule

[Schedule a Call Doctor](#)

Click on the Call Doctor Link:

[Schedule An AB Doctor](#)

Click on the AB Doctor link.

### WE Health Clinic Scheduling

Call Doctors for 06-02-2020 :

Previous Call Doctors: Doc Holliday , Dr. Allcall , [Dr. Call](#) , Dr. Caller , Dr. Callme , Dr. Callme , Dr. Callonme , [Dr. IllCallU](#)

Start Time :  End Time :

## WE Health Clinic Scheduling

Doctors on staff for 06-02-2020 :

Previous Doctors: [Call Doc](#) , [Doc Holliday](#) , [Doc Sev](#) , [Doc Severenson](#) , [Dr. Detroit](#) , [Dr. Holliday](#) , [Dr. Johnson](#) , [Dr. Jones](#)

AB Doctor: Doc Holliday	Call Doctor: 	Repro Doctor:	Staff:
-------------------------	--	---------------	--------

[Schedule a day to be open](#)

Click on the start time and then Provider.

**Patient** **Provider**

**Category:** Doctor ☐ All day event

**Date:** 06/02/2020 Code:060220 ☒ Time 8 : 30 AM ☐

**Patient** **Provider**

**Category:** In Office ☐ All day event

**Date:** 06/02/2020 ☒ Time 8 : 30 AM ☐

**Title:** duration 0 minutes

**Patient** **Provider**

**Category:** In Office ☐ All day event

**Date:** 06/02/2020 ☒ Time 8 : 30 AM ☐

**Title:** duration 480 minutes

Now you have a blue block to add people in to.

Tuesday, June 2, 2020 Dr. Days current month

	AB Doctor: Doc Holliday	Call Doctor:	Repro Doctor:	Staff:
8:00				
8:15				
8:30	08:30 IN			
8:45				
9:00				
9:15				
9:30				
9:45				

## Doctor Days Per Month

Now that we have a doctor during the month – we can create a sheet from Dr. Days + 1 month

<b>WE Health Appointment Calendar</b>	<b>Month : 2020-6-2 to 2020-07-02</b>
---	---------------------------------------

---

**Abortion Dates**  
2020-06-02 - Tuesday - Doc Holiday

**Call Dates**

**Reproductive Doctor Dates**

### Adding an existing patient appointment

So someone rings in and you can check to see when the next appointment is. Select on an available time during that day:

Patient

Provider

Category:

Doctor

▼

☐ All day event

Date:

06/02/2020

Code:060220

☒ Time

8

:

45

AM

▼

Title:

duration

15

minutes

Title Examples for Doctor:

Abortion, IUD, Wellness, Nextplanon, Hormone, MD Visit

Patient:

Click to select

☐ Previous Patient?

Label?

Comments:

This shows

on Flow Board

as Appointment

If a minor, please note how they will satisfy parental notification law!

Funding Notes:

Save

Find Available

Delete

Cancel

Create Duplicate

Abortion Appointment will give you a reminder:

calendar says

Remember to Ask:

- \* This process will take 10 minutes.
- \* Do you have something to write with?
- \* Did you have a Positive Pregnancy Test?

OK

## Patient Search



Search by:

Name

for:

Smith

Search

7 records found.

Name	Phone	SS	DOB	ID
Smith, Alice	218-555-1212		1980-01-01	17
Smith, Dil	218-999-1515		1984-01-01	23
Smith, Echo	218-999-1999		1990-01-01	24
Smith, Golf	218-999-9987		2006-02-27	26
Smith, Ike L	218-997-8989		2003-01-01	27
Smith, Juliet	218-987-4685		2003-04-05	28
Smith, Kilo	218-555-1251		2006-01-01	29

Patient

Provider

Category: 

Doctor

All day event

Date: 

06/02/2020

Code060220

Time

8

 : 

45

AM

Title: 

Abortion

duration

15

 minutes

Title Examples for Doctor:  
Abortion, IUD, Wellness, Nextplanon, Hormone, MD Visit

Patient: 

Smith, Alice

Previous Patient?

Label?

LMP 

05/05/2020

Abortion Type:

UNK

SAB

MAB

Comments: 

This is an insightful comment

  
This shows  
on Flow Board  
as Appointment  
If a minor, please note how they will satisfy parental notification law!

Funding Notes: 

FEUND

Save

Find Available

Delete

Cancel

Create Duplicate

8:00	
8:15	
8:30	08:30 IN
8:45	08:45 - Smith, Alice
9:00	
9:15	

## Setting up an “Encounter”

The initial phone call is really an encounter. This is because you have to go over certain items with them (remember the 10 minutes and something to write with 😊 ?)

So, you can actually open an encounter with them using the + near the patient on top.

The image shows a patient header bar with a purple background. On the left is a grey person icon. To its right, the text reads "Patient: Alice Smith (17)" with a small 'x' icon. Below this, it says "DOB: 01/01/1980 Age: 40". At the bottom left is a search bar with the text "Search by any" and a magnifying glass icon. On the right side, there is a circular icon with a plus sign inside, which is circled in blue. To its right, the text "Open Encounter: None" is displayed.

This is where you can get the callers info and (if needed) inform a staffer of some medical condition.

The image shows a form titled "Issue" with a tabbed interface. The "Type:" section has four radio buttons: "Medical Cond." (selected), "Allergy", "Medication", and "Rec. Hosp.". Below this is a scrollable list of medical conditions: "asthma", "Blood Clotting", "diabetes", "Epilepsy", "Heart Disease", and "Uses Inhaler - Remind to bring". Below the list is the instruction "(Select one of these, or type your own title)". The "Title/Descrip:" section has a text input field. Below this is a note: "\*Remember to ask which Dr. is treating them for this condition and any general history about the condition." The "Comments:" section has a large text area. At the bottom are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an 'x' icon).

Let's just say they have a bleeding disorder



**Issue**

Type: ☒ Medical Cond. ☐ Allergy ☐ Medication ☐ Rec. Hosp.

asthma  
Blood Clotting  
diabetes  
Epilepsy  
Heart Disease  
Uses Inhaler - Remind to bring

(Select one of these, or type your own title)

Title/Descrip: Blood Clotting

**\*Remember to ask which Dr. is treating them for this condition and any general history about the condition.**

Comments: Dr. Smith is treating for Von Willibrands

✓ Save ✕ Cancel

With this – you may want to alert the nurse about this:

**Add Issue** **Inform Staffer**

Briggs, Paulina

P: Blood Clotting

✓ Save ✕ Cancel

After saving – we have two forms to fill out:

**AB Appt**

24 Hour MD
AB Appt Info
Care Plan
Vitals

First is 24 hour MD appt

If you fail to receive the state mandated information from the physician, your abortion appointment will be canceled.

Notes: Some notes here

2020/06/02 03:56:18pm

Call Dates:

☒ 2020-06-02 with Dr. Call between: 17:00-20:00

Signed by: dbremerAdmin

Date and Time: 2020/06/02 03:56:18pm

Save

Don't Save

Then, you have to go through all the stuff they should know:

Summary

AB Appt Info

Save

Don't Save

WE Health Clinic, P.A., 32 E. 1st St., Suite 300, Duluth, MN 55802 218-727-3352

### AB Date Information

Current Date: 2020/06/02

☒ Toggle All

☒ Patient Initials

Now you can print off the Mandated information:

Summary
AB Appt Info

### 24 Hour State Mandated Information

Print

WE Health Clinic, P.A., 32 E. 1st St., Suite 300, Duluth, MN 55802 218-727-3352


#### Twenty Four Hour State Mandated Information

Current Date: 2020/06/02

Name: Smith, Alice Address: ,  
Phone: 218-555-1212 DOB: 1980-01-01 Age:  
Last Menstrual Period: 05-05-2020 Weeks: 4  
Abortion Type: Unknown

## Call Schedule

Before anything happens – you give the call schedule to the doctors:



Dr. Call  
WE Health (218) 727-3352

Date: 2020-06-02  
Time: 17:00-20:00

	Name	S/M	Text	Age	Telephone	Gest Age	Appt Date	Appt Time	Consultation Date	Consultation Time	Call Complete
1	Alice S.	?	YES	40	218-555-1212	4 weeks	2020-06-02	08:45:00			

## Clinic Day – Looking at the Flow Board

Total patients: 1 | None: 1




Print Daily Schedule
Print Dr. Days
Kiosk

PID	Patient [Note]	Appt Date	Appt Time	Appt Status	Visit Type	Appointment [Note]	Funding Notes	Label	Updated By
17	Smith, Alice <sup>PI</sup>	06/02/2020	08:45	None	Abortion	This is an insightful comment	FFUND	Label	dbremerAdmin

Currently, you have the Daily Schedule. The button “Print Daily Schedule” will get you what you are looking for!

## WE Health Daily Appointment Calendar

Date : 2020-06-02

Staff Scheduled:

Providers Scheduled: (AB):Doc Holliday, (Call):Dr. Call

Required Skills: Doctor

Time	Arrived	Appointment * =minor [p]=Prev. Pat.	Phone Number	Notes	N/S Texted?
08:00					
08:30		Smith, Alice (1980-01-01) <sup>[p]</sup> -Abortion-?	218-555-1212	This is an insightful comment Funding (MA) : FFUND--YES	
09:00					

### When a Patient Arrives

The computer can actually tell people where the patients are during their visit. To put where the patient is, click the “Appt Status” Link.

### Change Status for Alice Smith

Status Type

- None

- None


x Canceled


? No show

@ Arrived

( Rescheduled

> Checked out

Total patients: 1		Arrived: 1		   <a href="#">Print Daily Schedule</a> <a href="#">Print Dr. Days</a> <a href="#">Kiosk</a>					
PID	Patient [Note]	Appt Date	Appt Time	Appt Status	Visit Type	Appointment [Note]	Funding Notes	Label	Updated By
17	Smith, Alice <sup>[P]</sup>	06/02/2020	08:43	Arrived	Abortion	This is an insightful comment	FFUND	Label	dbremerAdmin

Total patients: 1		Checked out: 1		   <a href="#">Print Daily Schedule</a> <a href="#">Print Dr. Days</a> <a href="#">Kiosk</a>					
PID	Patient [Note]	Appt Date	Appt Time	Appt Status	Visit Type	Appointment [Note]	Funding Notes	Label	Updated By
17	Smith, Alice <sup>[P]</sup>	06/02/2020	08:45	Checked out	Abortion	This is an insightful comment	FFUND	Label	dbremerAdmin

### Viewing the Patient information

Click on the patient name to get the Medical Record:

## Medical Record Dashboard - Alice Smith

Delete Print Label

**Dashboard** Report Issues

**Billing** (expand)

**Edit** Demographics (collapse)

**Who** Contact Visibility Guardian

**Name\***: Alice Smith **DOB\***: 01/01/1980  
**Legal Name**: Alice **Legal Sex**: Female  
**Gender Identity**: CIS Female **Gender Identity (if other)**:  
**Previous Names**:

**Edit** Insurance (collapse)

**Primary** Eligibility

**Primary Insurance until Present**:  
MA  
1  
St. Paul, MN 55555  
Policy Number: 111  
Plan Name: Med Ass  
Group Number: 42  
**Subscriber**:  
(self)  
**Notes**: Some Notes

**AB Paperwork** (collapse)  
Paperwork Date: 2020-06-02 15:58:28  
Sched. Call Time: 2020-06-02-17:00-20:00  
**Edit** Clinical Reminders (collapse)  
Measurement: Mammogram (Past Due) ?  
Examination: Pap Smear (Past Due) ?  
**Add** Appointments (collapse)  
06/02/2020, 08:45 am (Tuesday)  
Status( > ) Doctor Com  
We Health Clinic  
**Recurrent Appointments** (collapse)  
None  
**Edit** Medical Problems (collapse)  
Blood Clotting  
**Edit** Allergies (expand)  
**Edit** Medications (expand)

### Putting in a new patient

So, what if we get a call and the patient isn't in the system? We have to add a new patient.

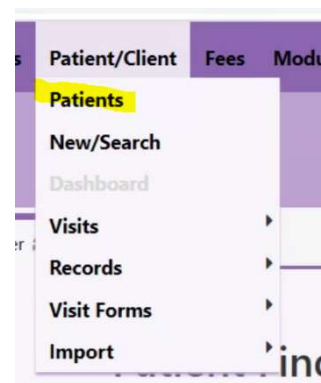
To see all the patients, use the Menu bar and select patient:

Patient Finder 🔍

**Add New Patient**

Show 50 entries Search:

Full Name	Home Phone	SSN	Date of Birth	External ID
Abbott, Sara	219-345-6621		01/01/1970	19
Bravo, Kilo	218-555-1212		01/01/1998	20
Brimley, Wilfred A			01/01/2000	8
Casey, Mike			05/20/1960	6



Now, select on the button for Add New Patient. The new patient form comes up. This should be pretty self-explanatory to you.

Anything starred is required.

### Reminder/Recalls

Finally, we want to call someone for a follow-up 3 months from now. To do this, go to the Messages item on the Menu. This encompasses three items: Messages to you, reminders for other staff, recalls for patients.

## Messages, Reminders, Recalls



**Messages** Reminders Recalls

MY MESSAGES

Show All | Active Messages | Show Inactive

<input type="checkbox"/>	From	Patient	Type	Date	Status
<input type="checkbox"/>	Administrator, Administrator	Echo, Juliet (Notes)	Please Review this Patient	01/31/2020	New
<input type="checkbox"/>	Administrator, Administrator	Moss, Donna (Notes)	Please Review this Patient	12/27/2019	New
<input type="checkbox"/>	Administrator, Administrator	Johnson, Beth (Notes)	Please Review this Patient	12/26/2019	New

[+ Add New](#) [Delete](#)

3 of 3

For a patient, use the Recalls location.

NEW RECALL

Create a reminder to schedule a future visit .

Name	<input type="text"/>	DOB	<input type="text" value="-"/>
Recall When	Last Visit: <input type="text"/>	Address	<input type="text"/>
	<input type="radio"/> plus 30 days		<input type="text"/>
	<input type="radio"/> plus 90 days	Home Phone	<input type="text"/>
	<input type="radio"/> plus 180 days	Mobile Phone	<input type="text"/>
Date:	<input type="text"/>	SMS OK	<input type="radio"/> YES <input type="radio"/> NO
Recall Reason	<input type="text"/>	AVM OK	<input type="radio"/> YES <input type="radio"/> NO
Provider	<input type="text" value="Health Clinic, We"/>	E-Mail	<input type="text"/>
Facility	<input type="text" value="WE Health Clinic"/>	E-mail OK	<input type="radio"/> YES <input type="radio"/> NO

[+ Add Recall](#)

\* N.B. Demographic changes made here are recorded system-wide.

## NEW RECALL

Create a reminder to schedule a future visit .

Name	<input type="text" value="Lincoln, Abby"/>	DOB	<input type="text" value="1960-01-01 - 60 years old"/>		
Recall When	Last Visit: <input type="text" value="02/28/2020"/>	Address	<input type="text" value="123 Main"/>		
	<input type="radio"/> plus 30 days		<input type="text" value="Duluth"/>	<input type="text" value="MN"/>	<input type="text" value="55812"/>
	<input checked="" type="radio"/> plus 90 days	Home Phone	<input type="text" value="218-555-1212"/>		
<input type="radio"/> plus 180 days	Date: <input type="text" value="05/28/2020"/>	Mobile Phone	<input type="text"/>		
Recall Reason	<input type="text" value="Post-op check"/>	SMS OK	<input checked="" type="radio"/> YES	<input type="radio"/> NO	
Provider	<input type="text" value="Health Clinic, We"/>	AVM OK	<input checked="" type="radio"/> YES	<input type="radio"/> NO	
Facility	<input type="text" value="WE Health Clinic"/>	E-Mail	<input type="text"/>		
		E-mail OK	<input checked="" type="radio"/> YES	<input type="radio"/> NO	

+ Add Recall

\* N.B. Demographic changes made here are recorded system-wide.