

SOP: Basic KenyaEMR 3.x Navigation

Last Update: July 2023

Task	To guide users on how to navigate enhanced KenyaEMR based on OpenMRS 3.x platform
Objective	Effectively use KenyaEMR to provide quality HIV care services
Target Group	Healthcare providers, HRIO, HIS
Requirements	A working instance of KenyaEMR

Introduction

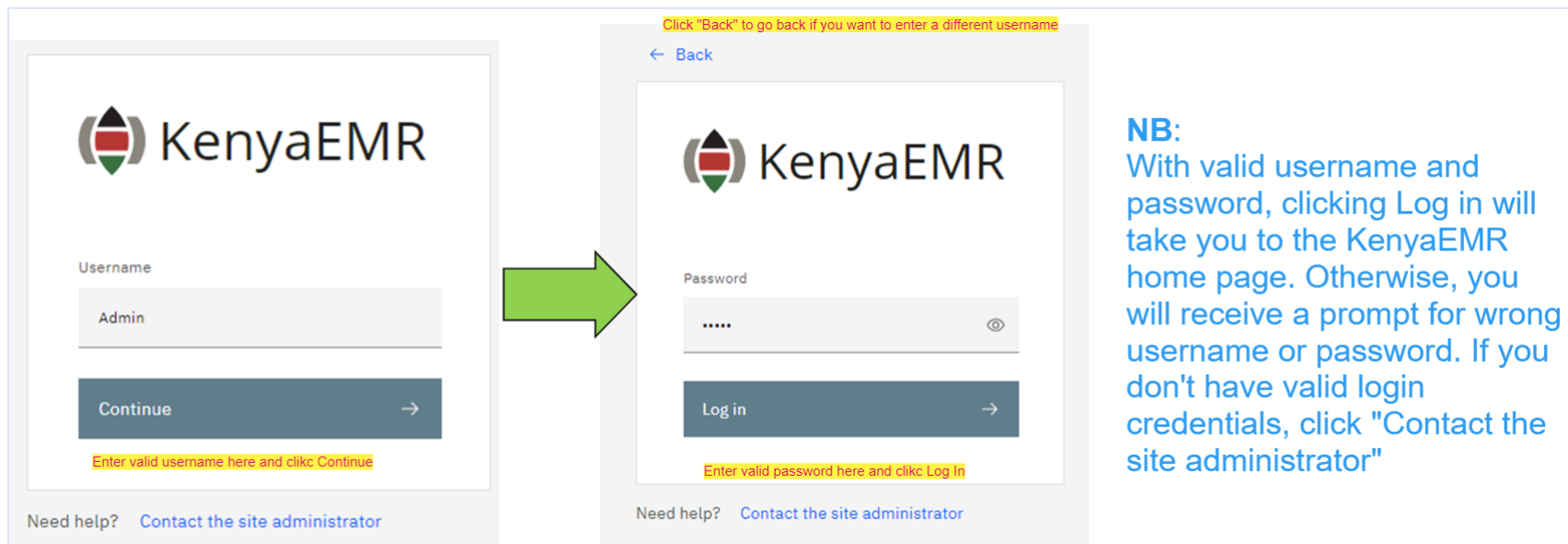
KenyaEMR routinely undergoes enhancements to improve on its functionalities and support additional clinical interventions at the facility. One of the key improvements undertaken recently was to gradually transform the workflow and the user interface using the latest technology deployed by OpenMRS 3.x. Some of the key features in the 3.x based KenyaEMR included a refined interface, offline mode, possible multi-tenancy support and better computing resource management.

As a user, at first you are likely to find a whole new user-experiences with the new interface from what you are used to in 2.x based KenyaEMR. But this is ok because this usermanual is designed with indepth illustration to help start you off on to this exciting interface.

To begin, you need to have your user login credentials (username and password) and the correct URL to access EMR.

Part 1: Login in to the system

- Enter the correct URL on your browser (i.e <http://192.168.1.2:8080/openmrs/spa>)
- The logging screen below will be displayed. Enter the correct username and password in the sequences shown
- If the details supplied are valid, the home page will be displayed, otherwise you'll receive "Invalid username or password" error.



Click "Back" to go back if you want to enter a different username

← Back

KenyaEMR

Username

Admin

Continue →

Enter valid username here and click Continue

Need help? [Contact the site administrator](#)

Password

.....

Log in →

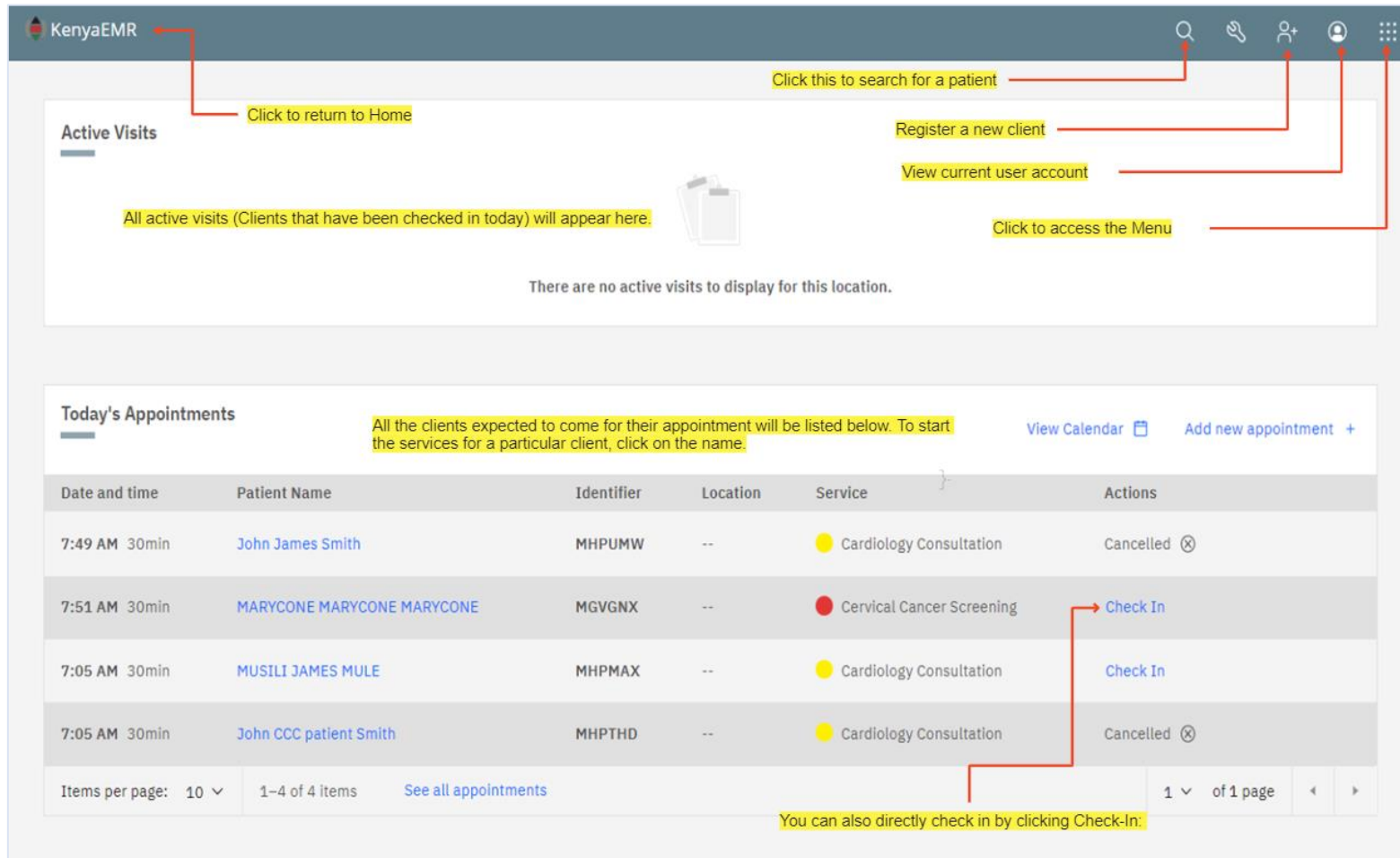
Enter valid password here and click Log In

Need help? [Contact the site administrator](#)

NB:
With valid username and password, clicking Log in will take you to the KenyaEMR home page. Otherwise, you will receive a prompt for wrong username or password. If you don't have valid login credentials, click "Contact the site administrator"

Part 1.2. Exploring the Home Page

The home page will be displayed. The homepage has several features that have been outlined in yellow labels in the figure below. You should take a few minutes to familiarise yourself with all the features provided.



The screenshot shows the KenyaEMR home page interface. The top navigation bar includes the KenyaEMR logo and several icons: a magnifying glass for search, a key for settings, a person icon for user management, a person icon with a plus sign for registration, and a grid icon for the menu. Below the navigation bar, the 'Active Visits' section is highlighted with a yellow label: 'Click to return to Home'. A search bar is also highlighted with a yellow label: 'Click this to search for a patient'. The 'Active Visits' section contains a message: 'All active visits (Clients that have been checked in today) will appear here.' and a note: 'There are no active visits to display for this location.' Below this, the 'Today's Appointments' section is highlighted with a yellow label: 'All the clients expected to come for their appointment will be listed below. To start the services for a particular client, click on the name.' This section includes a table of appointments and a 'Check In' button for the appointment at 7:51 AM. A yellow label at the bottom of the screenshot states: 'You can also directly check in by clicking Check-In.' The table of appointments is as follows:

Date and time	Patient Name	Identifier	Location	Service	Actions
7:49 AM 30min	John James Smith	MHPUMW	--	Cardiology Consultation	Cancelled ⊗
7:51 AM 30min	MARYCONE MARYCONE MARYCONE	MGVGNX	--	Cervical Cancer Screening	Check In
7:05 AM 30min	MUSILI JAMES MULE	MHPMAX	--	Cardiology Consultation	Check In
7:05 AM 30min	John CCC patient Smith	MHPTHD	--	Cardiology Consultation	Cancelled ⊗

At the bottom of the appointments section, there is a pagination control showing '1 of 1 page' and a 'See all appointments' link.

Part 2: Register new client

Click the icon for Creating new client (refer to figure 2 above). The following screen will be displayed. Proceed and capture the information about the new client as illustrated starting with the Basic Info.

- You can add more client Identifiers by clicking “**Configure**” link on this form.

Create New Patient

Jump to

- Basic Info** Step 1
- Contact Details
- Relationships
- Demographics
- Next of Kin Details

[Register Patient](#)

[Cancel](#)

1. Basic Info

All fields are required unless marked optional

Full Name

Patient's Name is Known?
 [Specify if patient's name is known](#)

First Name
 [Enter the first name here \(Required\)](#)

Middle Name (optional)
 [Enter middle name \(if available\)](#)

Family Name
 [Enter Last name \(Required\)](#)

Sex

Sex
 Male [Specify Gender of patient](#)
 Female

Birth

Date of Birth Known?
 [Select "Yes" if patient knows exact date of birth, otherwise select No and enter the estimated years](#)

Estimated Years Estimated Months

Identifiers [Configure](#) →

OpenMRS ID
Auto-generated

- Proceed to enter the contact details of the client. Capture as much contact details as client can provide.

Create New Patient

Jump to

- ↳ Basic Info
- ↳ Contact Details**
- ↳ Relationships
- ↳ Demographics
- ↳ Next of Kin Details

Register Patient

Cancel

All fields are required unless marked optional

Address

Search address You can begin by typing the name of the county in the search area. Then click to select the county. This will auto populate the county, sub-county and Ward Names.

County
Kisumu Start typing the name of the county. A drop down will be displayed. Click on the correct county name.

Sub county
Kisumu east Start typing the name of the sub county. A drop down will be displayed. Click on the correct sub-county name.

Ward
Kolwa central Start typing the name of the ward name. A drop down will be displayed. Click on the correct ward name.

Telephone contact
0711999222 Ensure the phone number is in the correct format e.g. 0721000000

Alternate phone number (optional)
Enter alternate phone number if available, otherwise leave blank

Postal Address (optional)
Enter address if available e.g. P.O. Box 111, Kawangware. Leave blank if unavailable

Email address (optional)
Enter correct email address e.g. testemail@gmail.com. Otherwise leave blank

Location (optional)
Enter the correct location name. Leave blank if unavailable

Sub-location (optional)
Enter the sub-location name if available, otherwise leave blank

- Next you need to capture relations – which includes the Demographic information and the next of kin.
- You can add more relationships by clicking “Add Relationship” link
- Once all the information is correctly captured, click “Register Patient” to save.
- If everything is correctly captured, the clients profile will be loaded and displayed as shown below.

Create New Patient

Jump to

- Basic Info
- Contact Details
- Relationships**
- Demographics**
- Next of Kin Details

Register Patient

Cancel

Relationship

Full name

JORAM JORAM JORAM Enter the name of the person related to client

Relationship

Partner From the drop-down list, select the correct relationship

[Add Relationship](#) You can add more relationships by clicking here.

4. Demographics

All fields are required unless marked optional

Marital status

Married polygamous

Occupation

Employee

Education

Primary school education

Select the marital status, Occupation and Education from the drop-down here

5. Next of Kin Details

All fields are required unless marked optional

Name (optional)

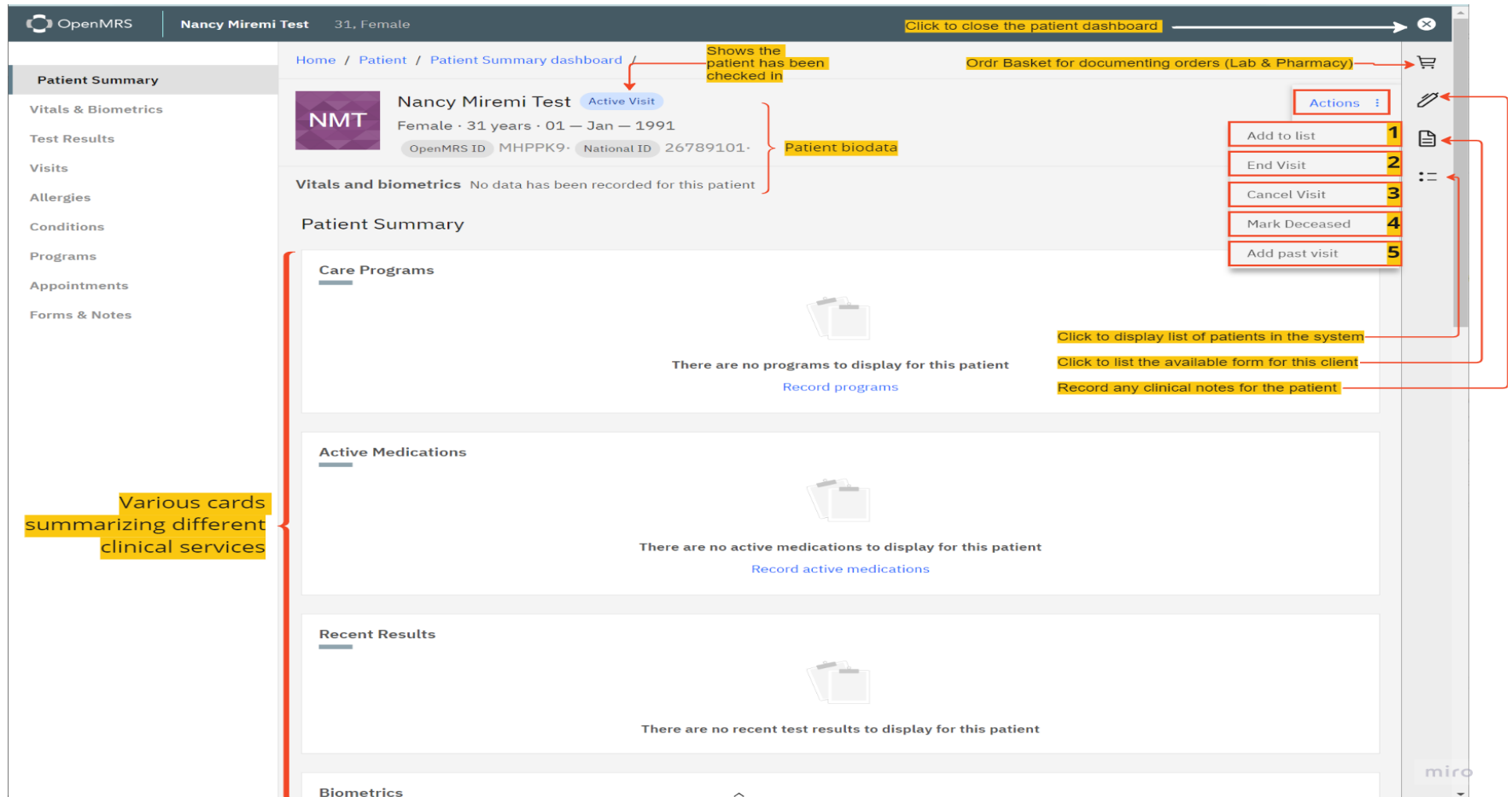
Sharma Marvel Otieno Enter the name of the next of kin here.

Relationship (optional)

Specify how the next of kin relates to the client

2.1. Patient Summary dashboard

The figure below shows a dashboard summary for a newly registered client. From here you can proceed to provide services and record the visit information by navigating the tabs on the left side of the screen.



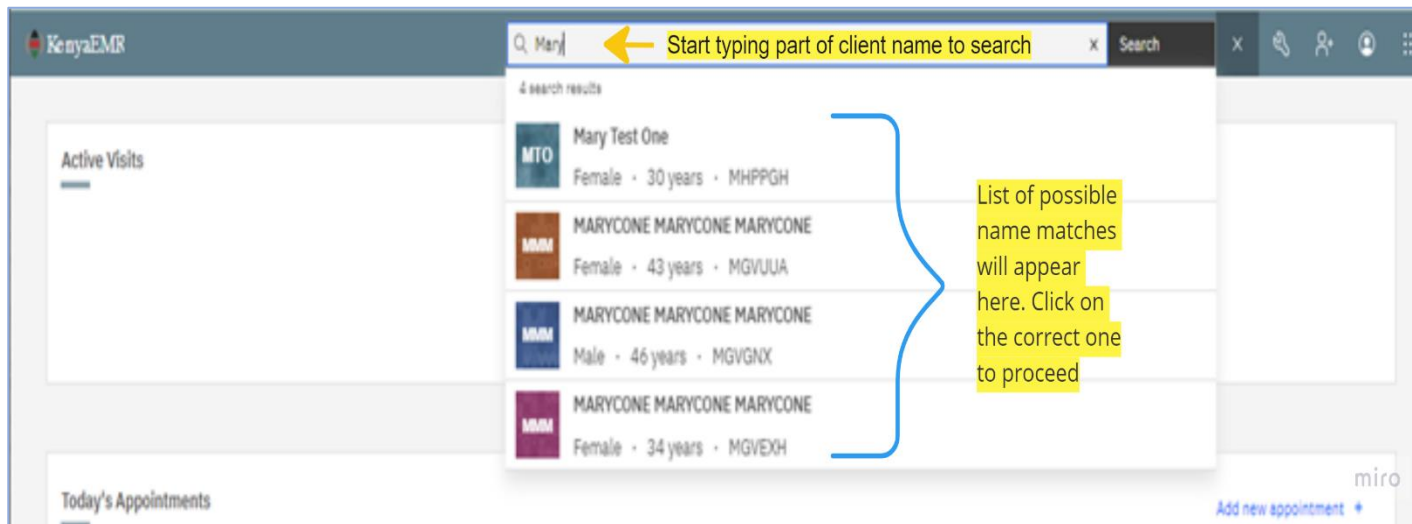
The screenshot displays the OpenMRS Patient Summary dashboard for Nancy Miremi Test, a 31-year-old female. The interface includes a navigation menu on the left with options like 'Vitals & Biometrics', 'Test Results', 'Visits', 'Allergies', 'Conditions', 'Programs', 'Appointments', and 'Forms & Notes'. The main content area shows the patient's profile with 'Active Visit' status, patient biodata (OpenMRS ID: MHPPK9, National ID: 26789101), and sections for 'Care Programs', 'Active Medications', and 'Recent Results', all of which currently show no data. An 'Actions' menu is open on the right, listing five options: 'Add to list', 'End Visit', 'Cancel Visit', 'Mark Deceased', and 'Add past visit'. Annotations highlight various features and actions, such as 'Shows the patient has been checked in', 'Click to close the patient dashboard', 'Click to display list of patients in the system', 'Click to list the available form for this client', and 'Record any clinical notes for the patient'. A red bracket on the left side of the dashboard cards is labeled 'Various cards summarizing different clinical services'.

You can perform additional functions as highlighted on the form.

Part 3: Existing Client

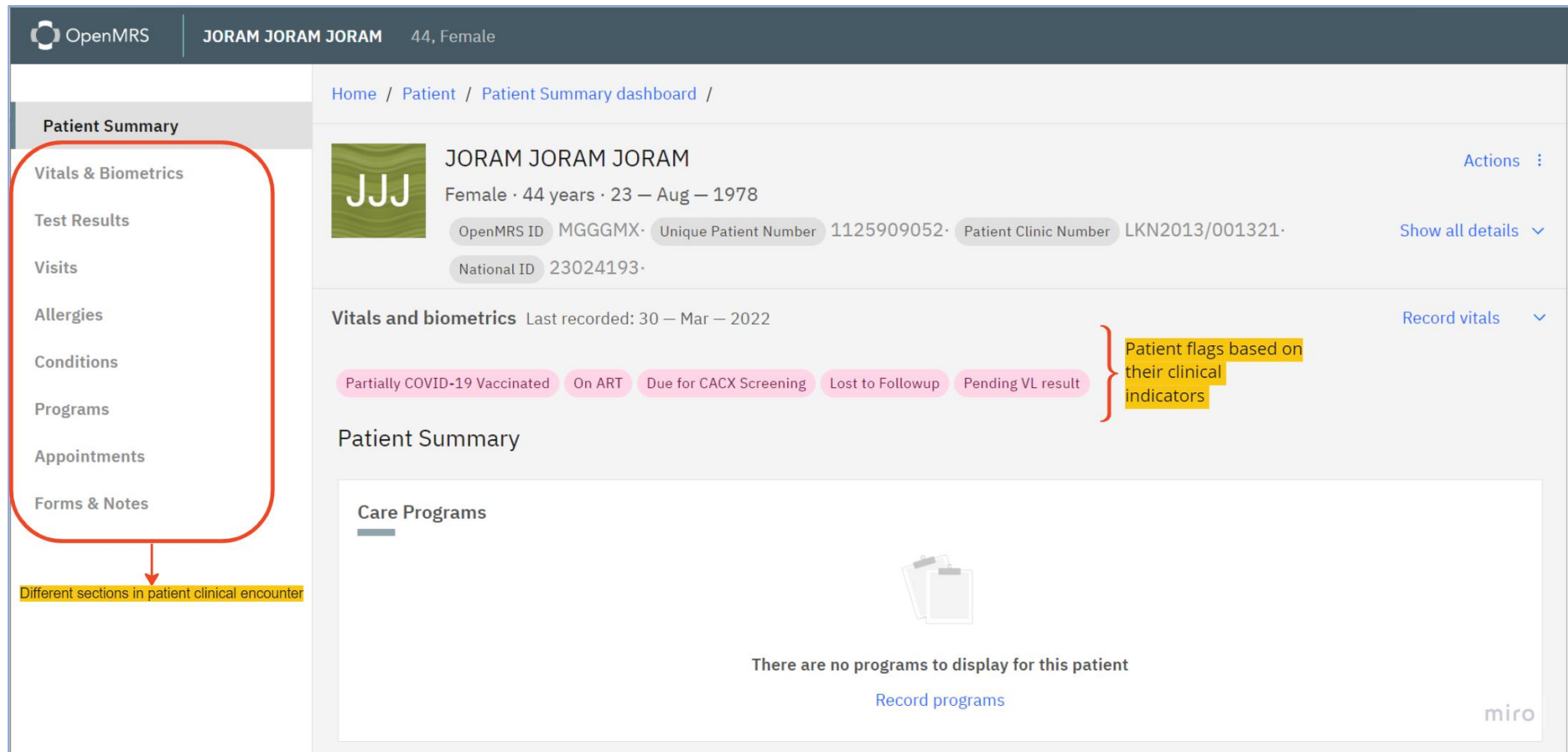
You don't need to create existing client details afresh, rather, you only perform a search, locate the patient and open their profile. You can search for existing client either by using their name (any part of the name) or by their client Identifier number. To begin the search, locate the **Search Patient** icon on the upper right corner (refer to figure 2). On the search box, type any part of the name or identifier. From the drop down list, locate and click on the correct patient to open their profile.

Note: The search action commences after typing three or more characters.



3.1 Client Dashboard

Clicking the specific patient from above search operation opens up their summary dashboard which contains basic demographic and clinical details. The figure below illustrates a sample client dashboard with client specific flags for reference. From here, you can select various sections highlighted on the left below and record encounter information starting from the vitals all the way to Forms & Notes.



OpenMRS | JORAM JORAM JORAM 44, Female

Home / Patient / Patient Summary dashboard /

Patient Summary

JJJ JORAM JORAM JORAM Actions

Female · 44 years · 23 — Aug — 1978

OpenMRS ID MGGGMX · Unique Patient Number 1125909052 · Patient Clinic Number LKN2013/001321 · Show all details

National ID 23024193 ·

Vitals and biometrics

Last recorded: 30 — Mar — 2022 Record vitals

Partially COVID-19 Vaccinated On ART Due for CACX Screening Lost to Followup Pending VL result

Patient flags based on their clinical indicators

Patient Summary

Care Programs

There are no programs to display for this patient

[Record programs](#)

miro

Different sections in patient clinical encounter

Step 1: Click to view patient summary dashboard

Step 2: Click this section to record Vital signs and Biometrics

Step 3: Click and record the lab test results

Step 4: Click this to view and edit all the previous encounters

Step 5: This displays all allergies specific to current client.

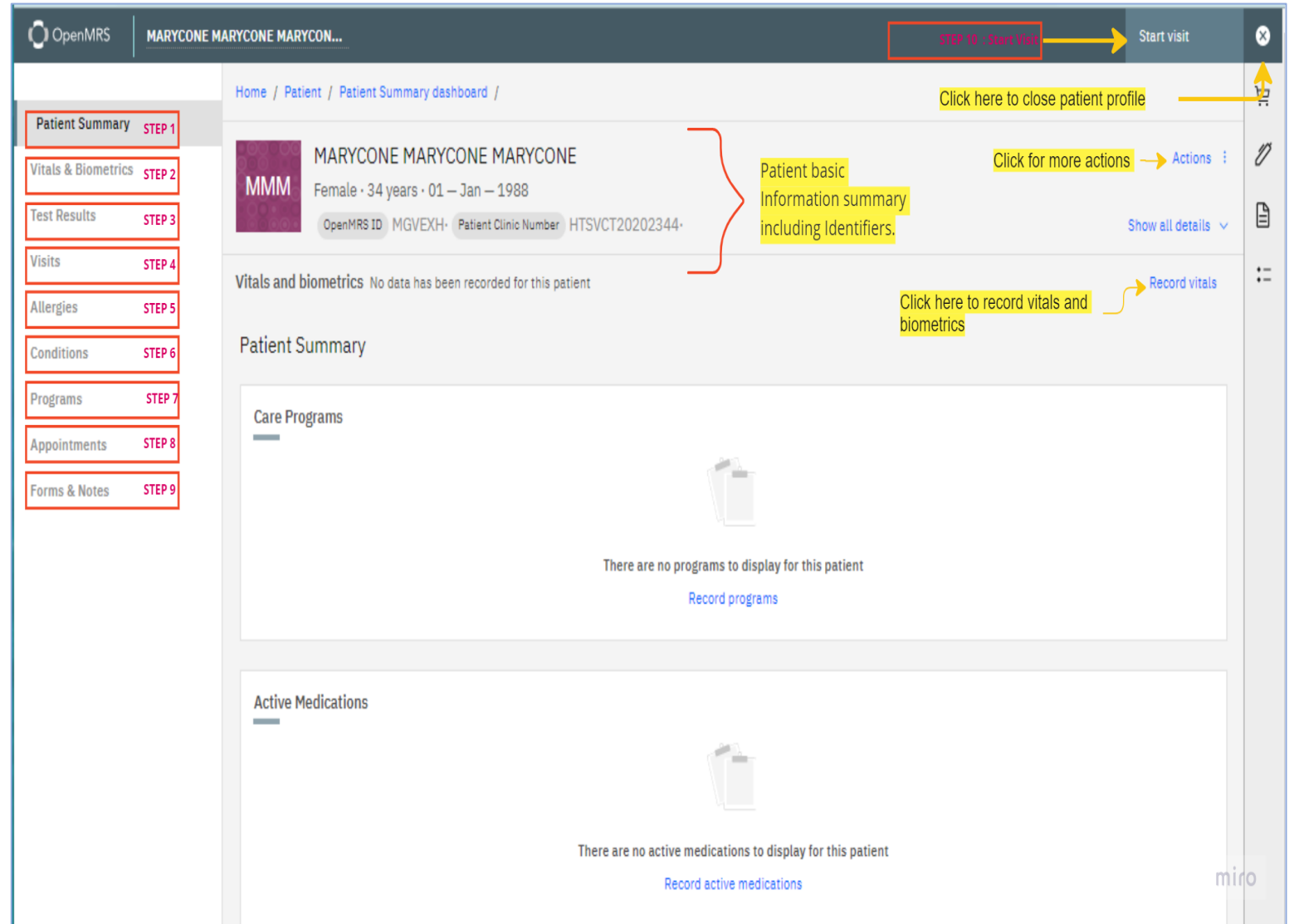
Step 6: Click to show all the documented medical condition for the current client.

Step 7: This displays all the programs into which the client is enrolled

Step 8: Click to view all the upcoming clinical appointments for the current client

Step 9: This takes you to all the previous clinic visits, diagnoses and clinical notes if any.

Step 10: Click on this to checking the client and commence the visit



The screenshot shows the OpenMRS patient summary dashboard for a patient named MARYCONE MARYCONE MARYCONE. The interface includes a navigation menu on the left with steps 1-9, a main content area with patient details, vitals/biometrics, care programs, and active medications. Annotations include arrows pointing to 'Start visit', 'Close patient profile', 'More actions', 'Record vitals', and 'Record programs/medications'.

Navigation Menu (Left):

- Patient Summary **STEP 1**
- Vitals & Biometrics **STEP 2**
- Test Results **STEP 3**
- Visits **STEP 4**
- Allergies **STEP 5**
- Conditions **STEP 6**
- Programs **STEP 7**
- Appointments **STEP 8**
- Forms & Notes **STEP 9**

Header: OpenMRS | MARYCONE MARYCONE MARYCON... | **STEP 10: Start visit** → Start visit

Navigation: Home / Patient / Patient Summary dashboard /

Annotations:

- Click here to close patient profile
- Click for more actions → Actions
- Patient basic Information summary including Identifiers.
- Click here to record vitals and biometrics → Record vitals
- Record programs
- Record active medications

Patient Details: MARYCONE MARYCONE MARYCONE, Female · 34 years · 01 – Jan – 1988, OpenMRS ID MGVEXH · Patient Clinic Number HTSVCT20202344

Vitals and biometrics: No data has been recorded for this patient

Care Programs: There are no programs to display for this patient

Active Medications: There are no active medications to display for this patient

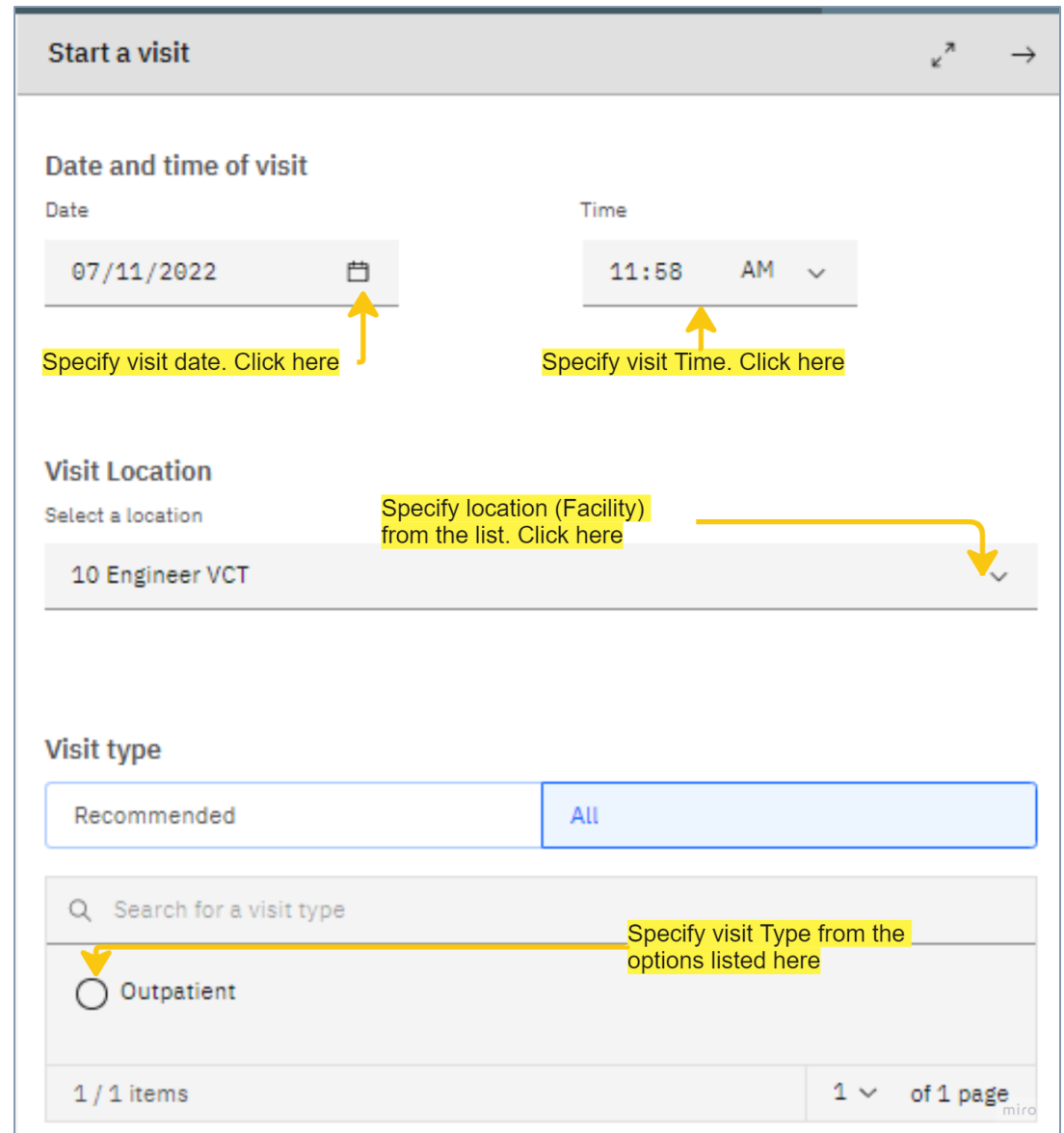
3.2. Starting a visit

To start providing services through the EMR, you need to first Check-in the client by starting the visit. As illustrated in Step 10 above, locate and click “**Start Visit**” button.

Start visit form will be displayed as shown. On the forms, specify the visit date by clicking on the calendar, click the time and specify. Check if visit location is pre-selected, if not, please contact your EMR champion or administrator.

Specify the visit type from the available visit types.

Once done, click “**Start Visit**” button at the bottom to save



The screenshot shows the 'Start a visit' form with the following sections and annotations:

- Date and time of visit:**
 - Date:** 07/11/2022. Annotation: "Specify visit date. Click here" with an arrow pointing to the calendar icon.
 - Time:** 11:58 AM. Annotation: "Specify visit Time. Click here" with an arrow pointing to the time field.
- Visit Location:**
 - Select a location: 10 Engineer VCT. Annotation: "Specify location (Facility) from the list. Click here" with an arrow pointing to the dropdown arrow.
- Visit type:**
 - Buttons: Recommended, All.
 - Search bar: Search for a visit type. Annotation: "Specify visit Type from the options listed here" with an arrow pointing to the search bar.
 - Selected option: Outpatient.
 - Footer: 1 / 1 items, 1 of 1 page.

3.3. Documenting Vitals and Biometrics.

Click **Record Vitals** (refer to figure 3.1 above) to access the vitals and biometrics page. The page has been simplified into two sections i.e. Vitals and Biometrics.

Record all the information in the two sections.

Note: Values that are extremely outside the normal will be highlighted in red. This is to warn you to countercheck.

You can also include brief notes on the vitals

Click **Save and Close** to submit the form once done.

Record Vitals and Biometrics

Record vitals

Temp	Blood Pressure	Pulse	SpO2
31 DEG C	128 / 80 mmHg	78 rate/min	90 %

Respiration Rate

79

Notes

All vitals are normal

Record biometrics

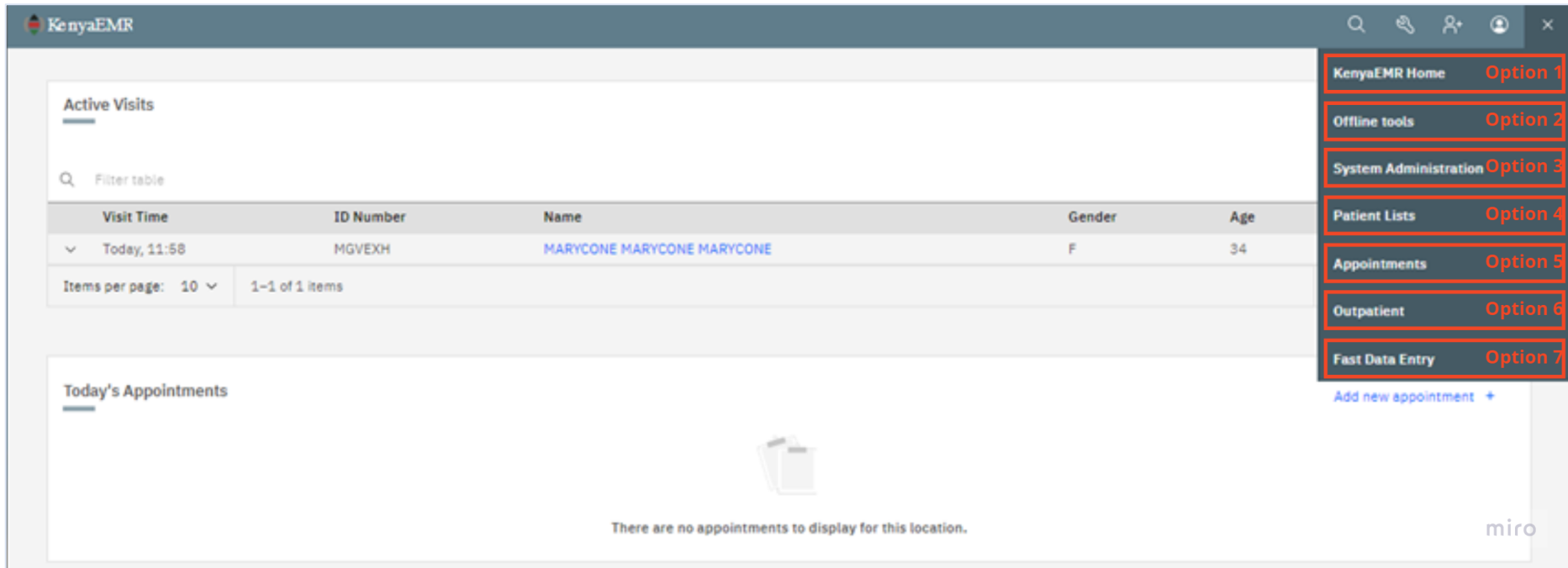
Weight	Height	BMI (calc.)	MUAC
80 kg	171 cm	27.4 kg / m ²	

Record all the vitals and biometrics in the spaces above. Click **Save and Close** to save the vitals. Otherwise click **Discard** to exit without saving

Discard Save and close

Part 4: Appointment Management

KenyaEMR has been enhanced with a comprehensive appointment management module with all the functionalities of documenting, tracking, amending and scheduling appointments. This module also includes patient queue management with flags for the various urgency priorities. In the next section, we are going to see how this module works, but first, let's describe the available options on the Menu as highlighted below.



The screenshot displays the KenyaEMR interface. On the right side, a vertical menu is visible with seven options highlighted in red boxes and labeled as Option 1 through Option 7. The main content area shows 'Active Visits' with a table containing one entry for MARYCONE MARYCONE MARYCONE. Below this, there is a section for 'Today's Appointments' which is currently empty, displaying a message: 'There are no appointments to display for this location.'

Visit Time	ID Number	Name	Gender	Age
Today, 11:58	MGVEXH	MARYCONE MARYCONE MARYCONE	F	34

Option 1: Click this to go to legacy KenyaEMR interface.

Option 2: This option takes you to offline mode

Option 3: Provides special tools for system administration

Option 4: Displays a list of patients in the system


Option 5: Takes you to appointment management module

Option 6: Opens up the patient Queue management module

Option 7: Provides a quicker way to open specific form and undertake data entry

4.1. Clinical appointment

There are several features provided to support patient appointment management in the appointment module. The features include viewing of appointments for specific dates, metrics on the providers available, line list of scheduled clients, cancelled, completed and checked in clients. The figure below illustrates the features of the appointment management home page. Take some few minutes to familiarize with the highlighted features.



Appointments

Appointments

📍 10 Engineer VCT · 28-Mar-2023 📅

Click here to select a different service type appointment date to view ▼

Appointment metrics

Appointments Calendar 📅

Create new appointment
🔒

Scheduled appointments

Patients

1

High volume service: 28-Mar-2023

HIV Consultation

1

Providers available: 28-Mar-2023

Providers

0

Scheduled

Unscheduled

click any tab to access corresponding list of clients in the category

Scheduled

Honored

Completed

Missed

Click here to expand the list to access more info about the client

Scheduled Appointments 🔍 Download 📄

Total 1

Patient name	Identifier	Service Type	Actions
CHRISTINE CHRISTINE CHRISTINE	XXX24400184	HIV Consultation	Follow up

Items per page: 25 ▼
1-1 of 1 items
1 ▼ of 1 page
🏠

4.2: View appointment calendar

You can view a line list of patients who have appointments on specific days. To access the list, click on “**View Calendar**” (from figure 4.1 above). This will open the appointment forms below. Click on the calendar to choose the day and view the list of appointment on that date.

From the list, you can also filter the appointments in categories of Daily, Weekly or Monthly.

KenyaEMR

⋮
👤
🔗
👤

- Home
- Billing
- Laboratory
- In Patient
- Appointments
- Service queues

Appointments

← Back

Calendar Add new clinic day →

Filter ▾

Daily
Weekly
Monthly

Prev
April, 2024
Next

SUN	MON	TUE	WED	THUR	FRI	SAT
	1	2	3	4	5	6
	HIV Consultation 1 Total 1	MCH Postnatal 1 HIV Consultation 36 Total 37	Lab tests 2 HIV Consultation 31 Total 33	Lab tests 1 HIV Consultation 30 Drug Refill 1 CWC Followup 1 Tb Followup 1 Total 34	MCH Antenatal 1 Lab tests 3 HIV Consultation 3 Total 7	HIV Consultation 1 Total 1
7		8	9	10	11	12
		HIV Consultation 34 Total 34	HIV Consultation 36 Total 36	MCH Antenatal 1 HIV Consultation 39 CWC Followup 1 Total 41	HIV Consultation 7 CWC Followup 1 Total 8	
14	15	16	17	18	19	20
MCH Antenatal 1 Total 1	HIV Consultation 2 Total 2	HIV Consultation 39 Total 39	HIV Consultation 35 Total 35	HIV Consultation 45 Total 45	Prep Initial 6 HIV Consultation 8 Total 14	

4.2. Create a new Clinic Appointment

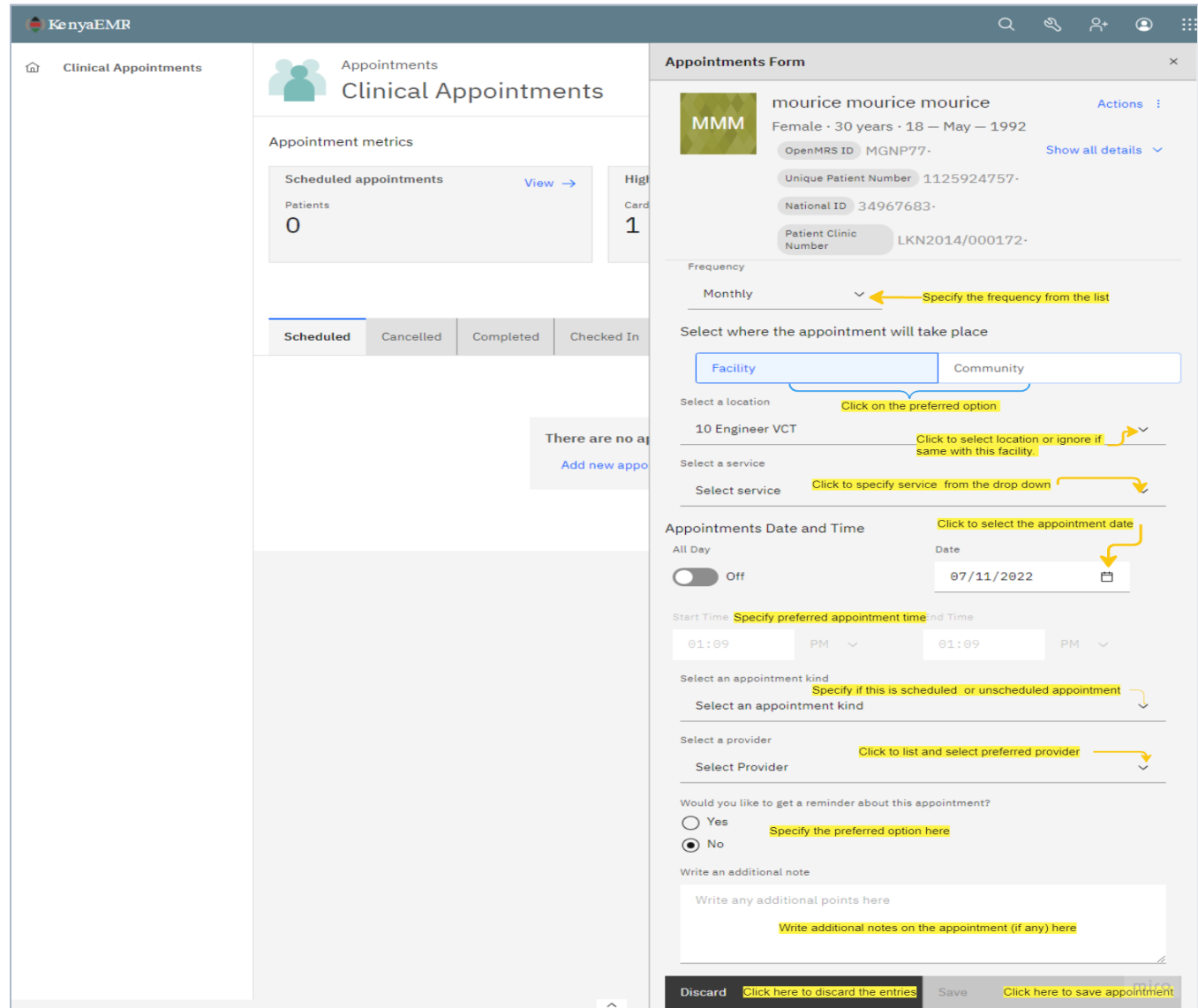
You can create new clinic appointments right from the appointment home page. To do this, click on the **Add New Appointment** (Refer to figure 4.1 above). This will open a side window where you can enter the details for the appointment.

The details include Frequency of appointments, where the appointment will take place, Type of service needed in the next appointment, appointment date/time, the kind of appointment and whether the client would like to receive appointment reminders.

A short calendar may be displayed to show the daily workload on the week specified.

There is also a provision to add some notes associated with the appointment.

Click on **Save** to submit the form.




The screenshot shows the 'Ke nyaEMR' interface for creating a new clinic appointment. The main window is titled 'Appointments Clinical Appointments' and shows 'Appointment metrics' with 'Scheduled appointments' at 0. A side window titled 'Appointments Form' is open, displaying the following fields and annotations:

- Patient Information:** Name 'mourice mourice mourice', Gender 'Female', Age '30 years', Birthdate '18 May 1992'. Fields for 'OpenMRS ID', 'Unique Patient Number', 'National ID', and 'Patient Clinic Number' are present.
- Frequency:** Set to 'Monthly' with an annotation 'Specify the frequency from the list'.
- Location:** 'Facility' is selected, with an annotation 'Click on the preferred option'.
- Service:** '10 Engineer VCT' is selected, with an annotation 'Click to select location or ignore if same with this facility'.
- Date and Time:** Date is '07/11/2022' (annotated 'Click to select the appointment date'), Start Time is '01:09 PM', and End Time is '01:09 PM' (annotated 'Specify preferred appointment time').
- Appointment Kind:** An annotation 'Specify if this is scheduled or unscheduled appointment' points to the selection area.
- Provider:** An annotation 'Click to list and select preferred provider' points to the 'Select Provider' dropdown.
- Reminders:** Radio buttons for 'Yes' and 'No' are present, with an annotation 'Specify the preferred option here'.
- Notes:** A text area for 'Write any additional points here' with an annotation 'Write additional notes on the appointment (if any) here'.
- Buttons:** 'Discard' (annotated 'Click here to discard the entries') and 'Save' (annotated 'Click here to save appointment') are at the bottom.

4.3. Patient Service Queue Management

This module supports management of patient during an active visit. It provides a line list of patients currently receiving services in the facility’s various service points, the type of services they are waiting for, and the waiting time. In addition, it provides color-coded priority flags for each patient. This helps to identify patients who might require urgent attention.

Besides showing the number of scheduled appointments for the day, you can also filter and view line list by Services being waited for i.e. Triage, Clinical, Lab etc. The EMR allows users to add more service queues representative of the patient flow in any given facility. There is provision to clear the Queue as well as to add more patients to the queue as captioned in the section below.



Service queue

Home

10 Engineer VCT · Today, 06:41 PM

View: 10 Engineer VCT ▾

Clinic metrics

Checked in patients Patient list →

Patients

1

Waiting for: All ▾ Patient list →

Patients

1

Average wait time today

Minutes

--

Add new service →

Add new service room →

Queue screen ☰

Add patient to queue +

In Queue

Not In Queue

Show patients waiting for: ▾

Clear queue 🗑

Name	QueueNumber	Priority	Status	Wait time (mins)		
▾ HELLEN HELLEN HELLEN	TRI-001	Emergency	🕒 waiting for Triage service	2 hours and 38 Minutes	🔔	Transfer Profile

4.4. Adding more clients to the queue.

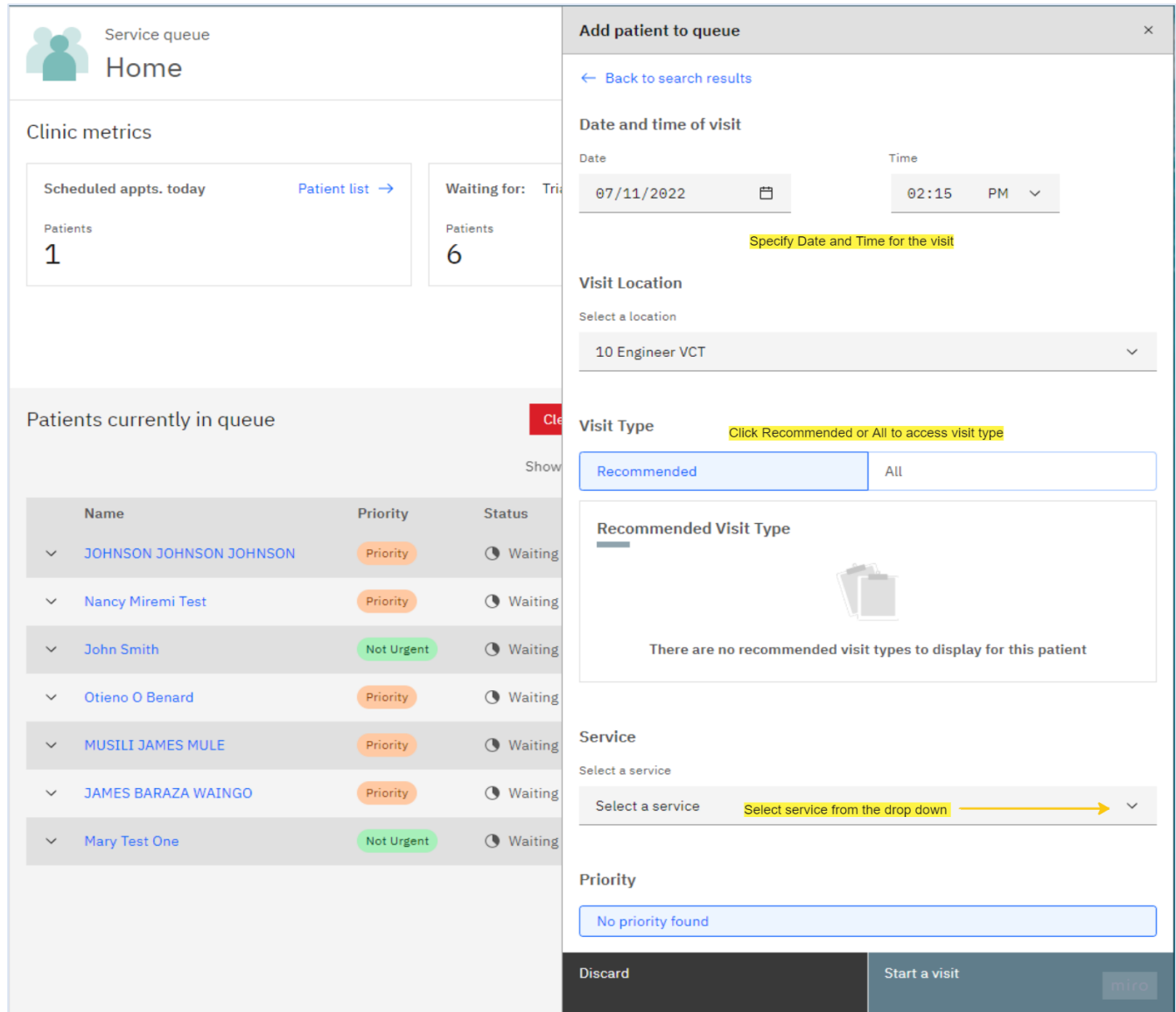
As you check in more patients, you also need to add them to the queue to help determine queue load per service area. To do this, you click **Add Patient to queue** (refer to figure 4.3 above).

This will display a search window. Enter the name or ID of the patient and click **Search**. From the list of likely matches, select and click on the patient you want to add to the queue.

On the displayed form, capture all the information required i.e. Date of addition, time, Visit type and the service being queued for.

Click Save a visit when done to submit. The patient will be added to the queue for the date specific under the service selected.

You can click on the arrow next to patient name to view more details. Otherwise click on the patient's name to go to patient profile from where you can provide services.



Service queue Home

Clinic metrics

Scheduled appts. today: 1 [Patient list →](#)

Waiting for: 6 Patients

Patients currently in queue

Name	Priority	Status
JOHNSON JOHNSON JOHNSON	Priority	Waiting
Nancy Miremi Test	Priority	Waiting
John Smith	Not Urgent	Waiting
Otieno O Benard	Priority	Waiting
MUSILI JAMES MULE	Priority	Waiting
JAMES BARAZA WAINGO	Priority	Waiting
Mary Test One	Not Urgent	Waiting

Add patient to queue

← Back to search results

Date and time of visit

Date: 07/11/2022 Time: 02:15 PM

Specify Date and Time for the visit

Visit Location

Select a location: 10 Engineer VCT

Visit Type

Click Recommended or All to access visit type

Recommended | All

Recommended Visit Type

There are no recommended visit types to display for this patient

Service

Select a service: Select a service [Select service from the drop down](#)

Priority

No priority found

Discard | Start a visit

5. Other patient related actions

There are other operations that can be carried out on the patient dashboard. This include adding patient to specific lists i.e. Offline mode list, ending a visit, cancelling a visit, marking patient as deceased and adding past visit.

5.1. **Add to list:** Use this to add current patient to specific lists i.e. Offline mode list.

5.2. **End a visit:** Click on the Action link and select End Visit. You will receive a confirmatory prompt. Confirm to exit.

5.3. **Cancel visit:** you can use this to cancel an active visit. You will receive a warning prompt. Confirm to exit

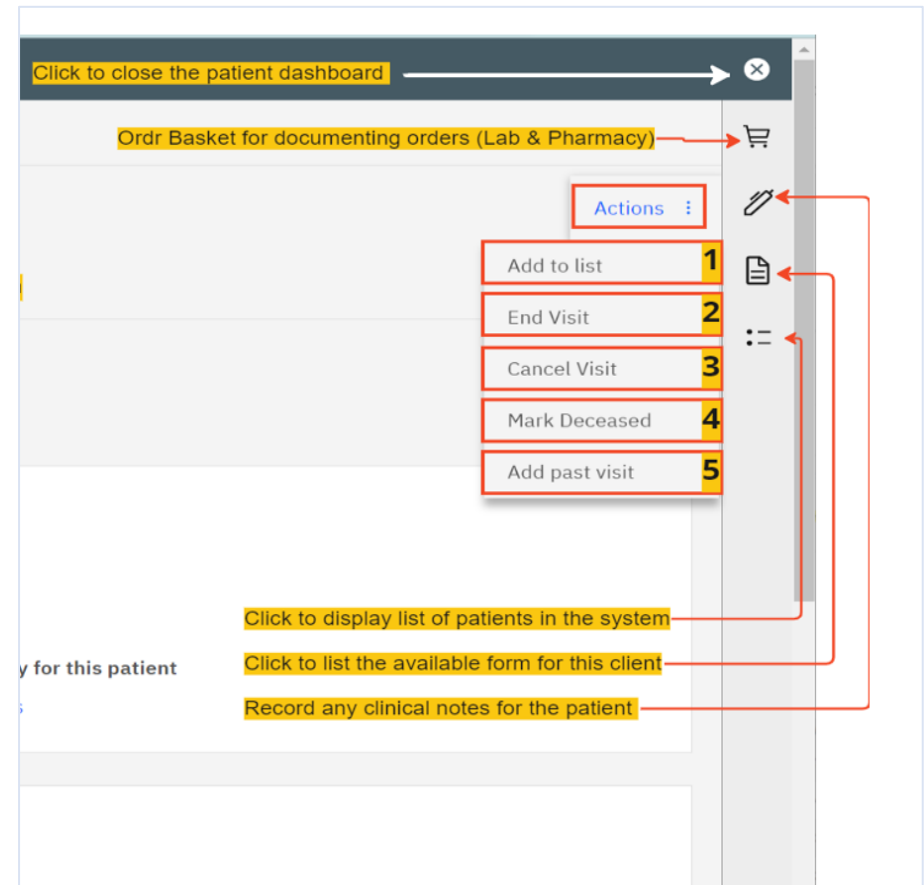
5.4. **Mark Patient as Deceased:** Use this to care- end a patient as a result of death

5.5. **Add past visit:** Use this action to add a past encounter information to the current patient.

You can utilise the icons on the side bar to actualise the functionalities listed below, i.e.

- Create lab or pharmacy orders
- Display patient line list,
- List the available forms
- Record clinical notes

To exit the patient dashboard, click the **X** icon on the upper right corner as highlighted.



THE END