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	**Effectivly use KenyaEMR to provide quality HIV care services**
Target Group	**Healthcare providers, HRIO, HIS**
Requirements	**A working instance of KenyaEMR**

Introduction

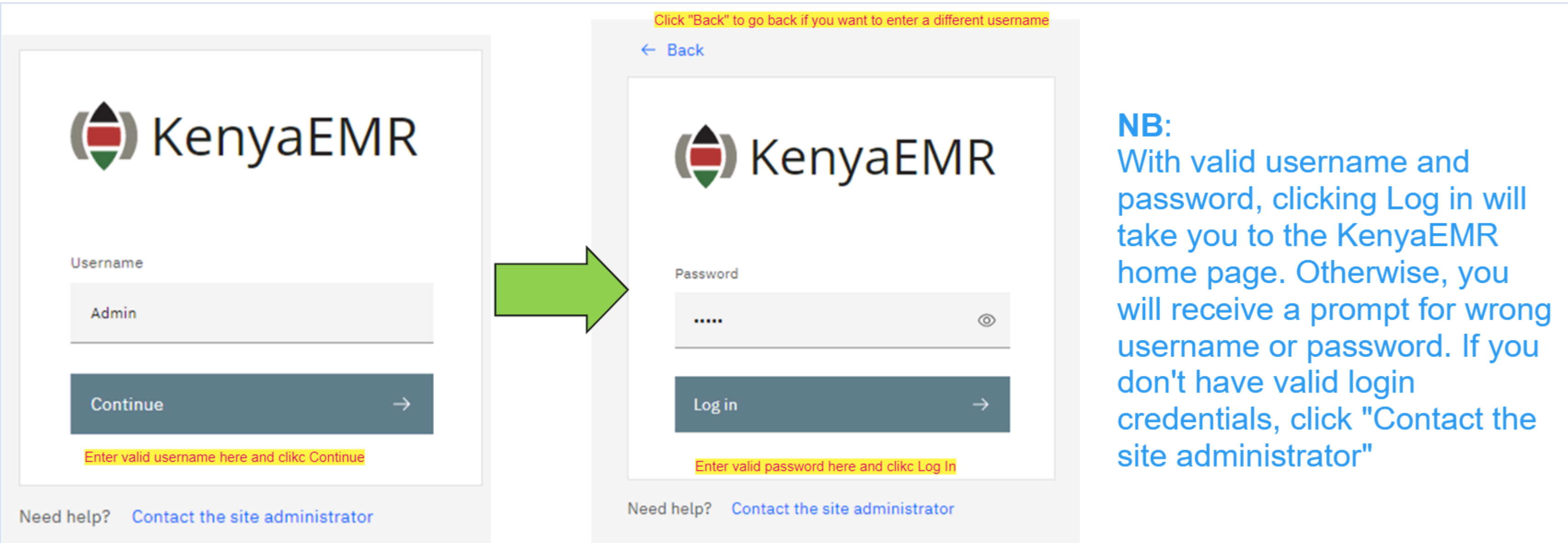
KenyaEMR routinely undergoes enhancements to improve on it's functionalities and support additional clinical interventions at the facility. One of the key improvements undertaken recently was to gradually transform the workflow and the user interface using the latest technology deployed by OpenMRS 3.x. 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 the a whole new user-experinces 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 you user login credentials (username and password) and the correct URL to access EMR.

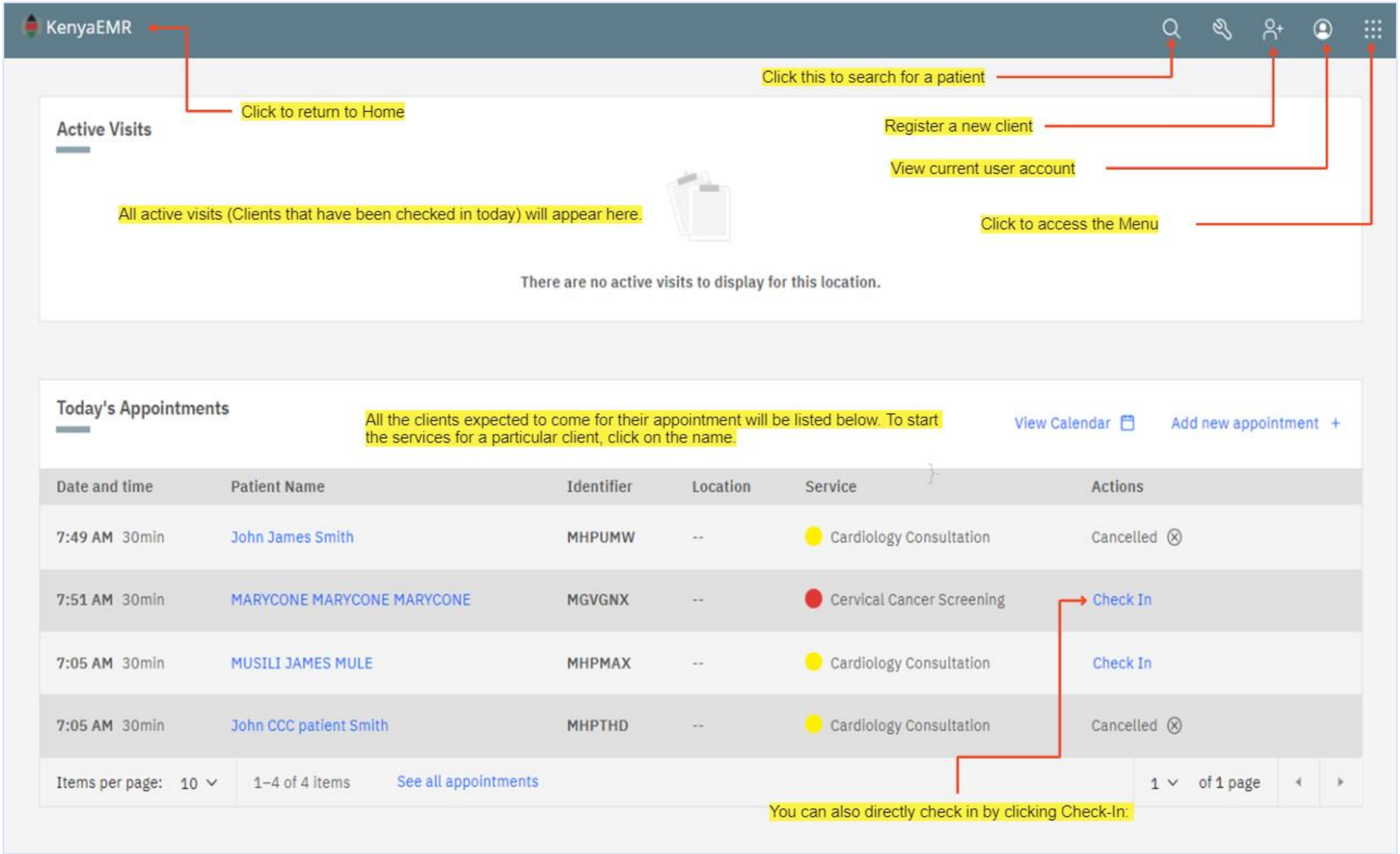
Part 1: Login in to the system

- Enter the correct URL on your browser (i.e http://192.168.1.2:8080/openmrs/spa)
- The loging 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.



Part 1.2. Exploring the Home Page

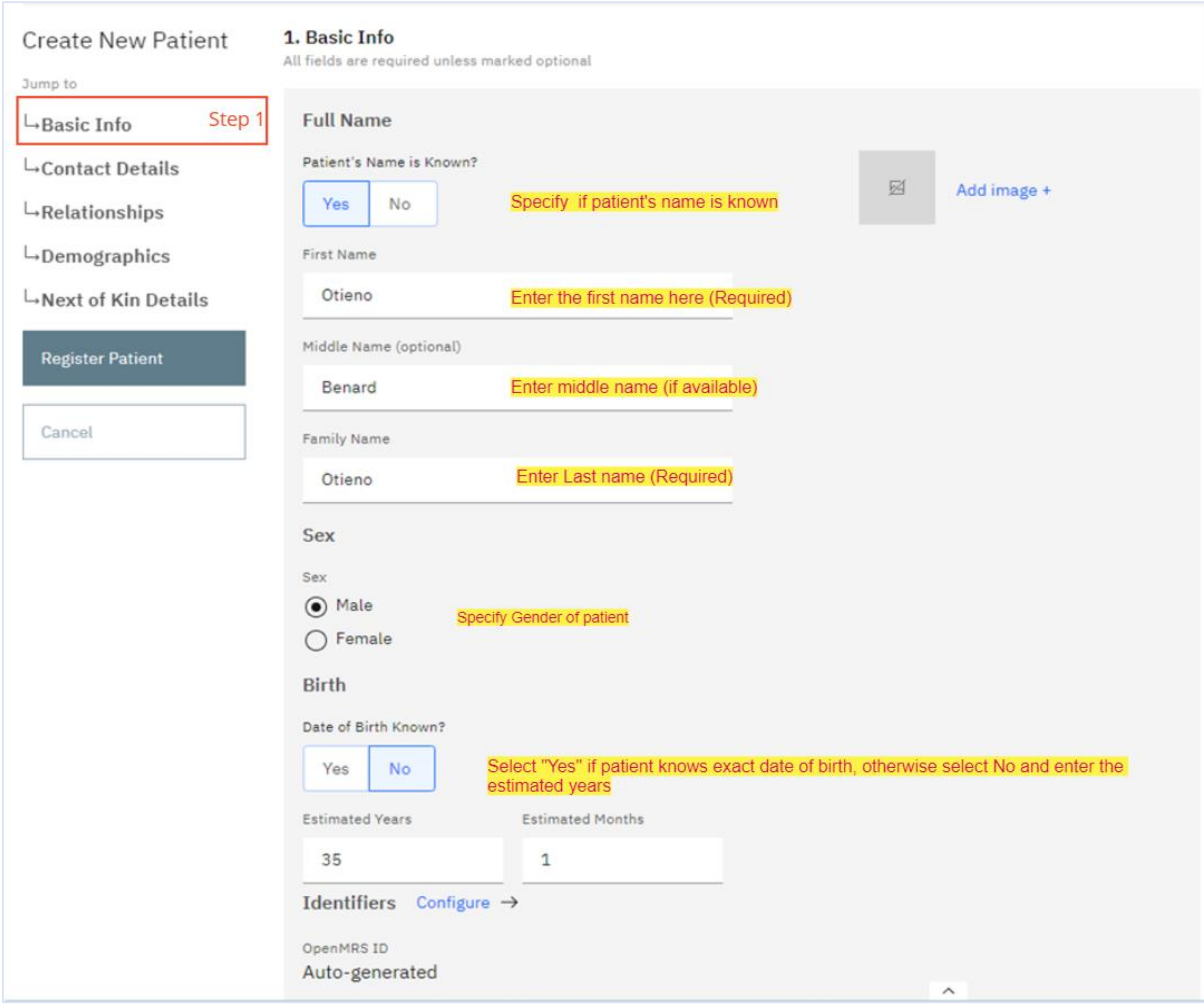
The home page will be displayed. The homepage has several features that have been outlines in yellow labels in the figure below. You should take a few minutes to familiarise yourself with all the features provided.



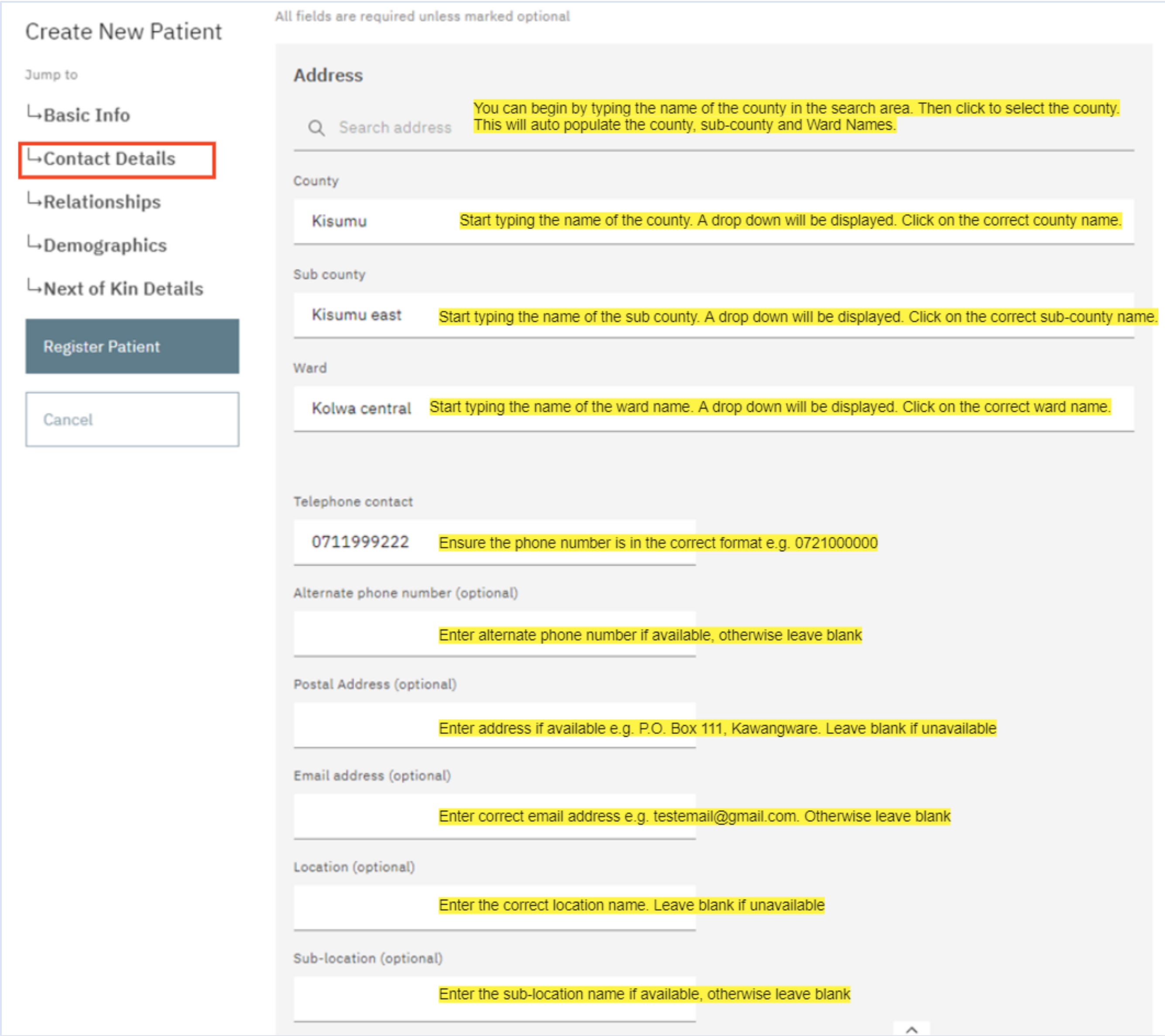
Part 2: Register new client

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.



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

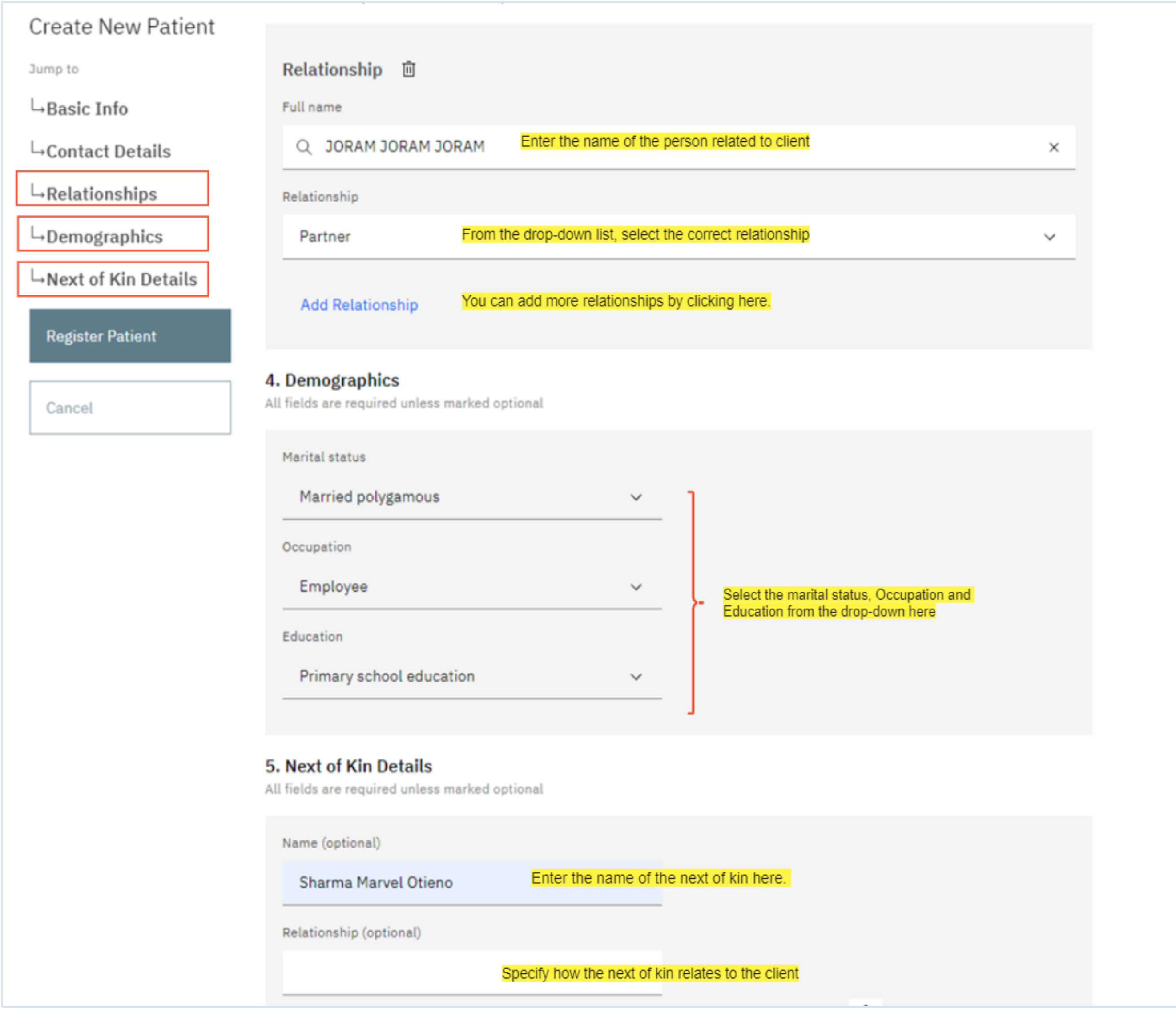


- Next you need to capture relations – which includes the Demographic information and the next of kin.

- You can add more relationships by clicking “**Add Relationship**” link

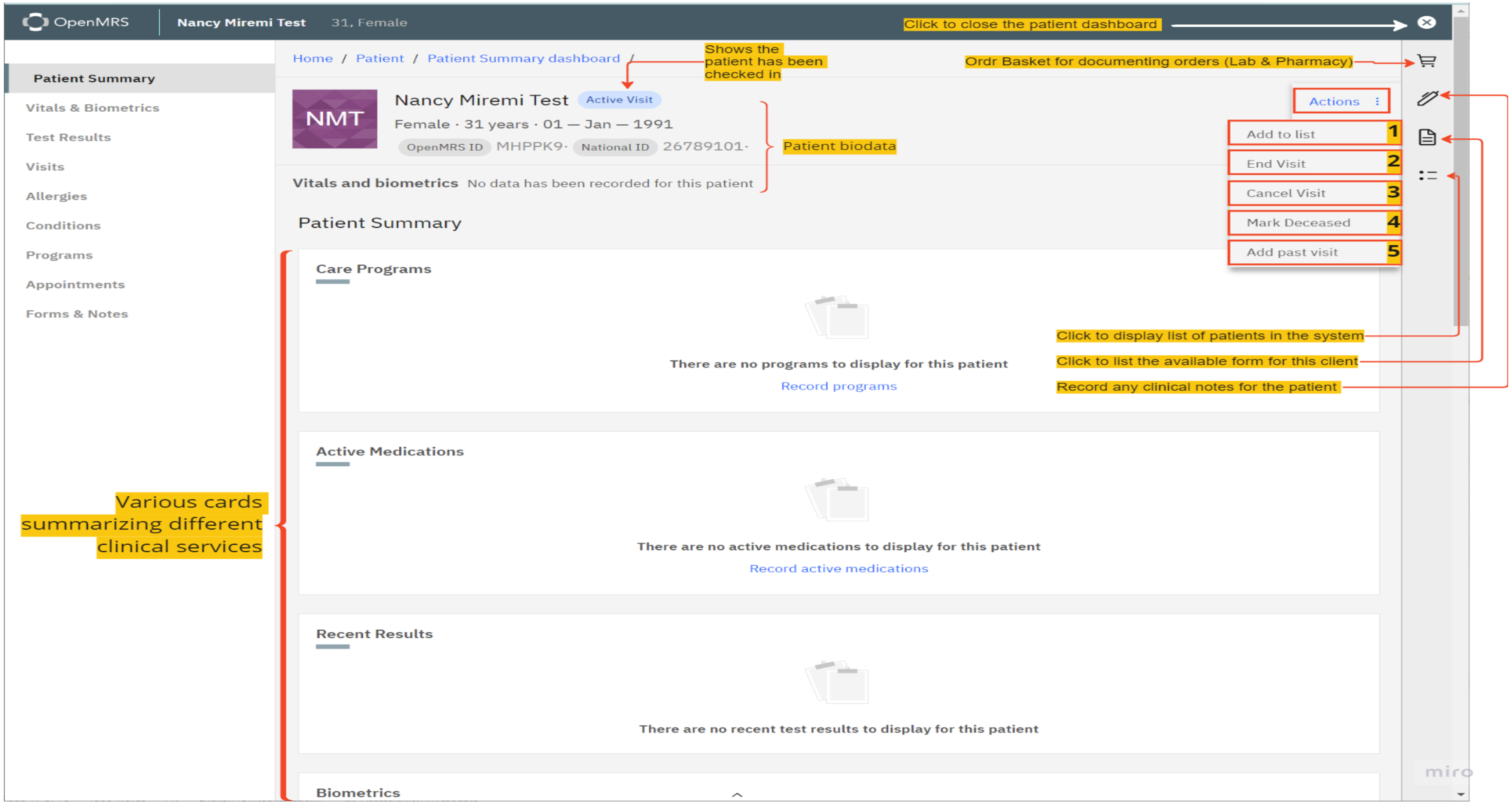
- Once all the information is correctly captured, click “**Register Patient**” to save.

- If everything is correctly captured, the clients profile will be loaded and displayed as shown below.



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.

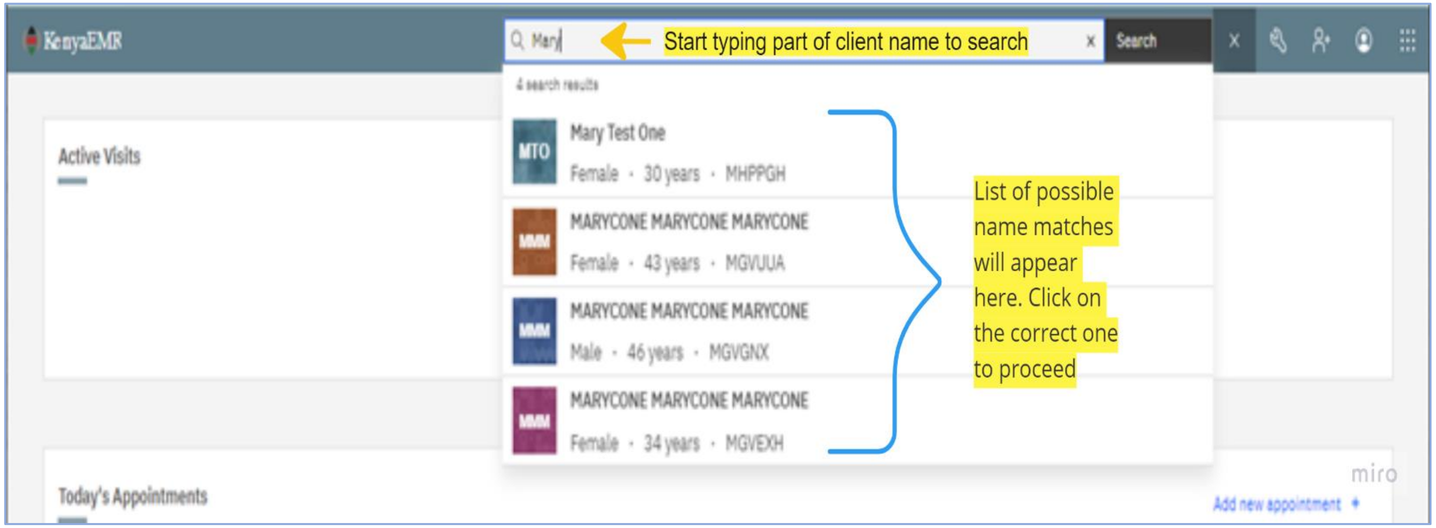


You can perform additional functions as highlighted on the form.

Part 3: Existing Client

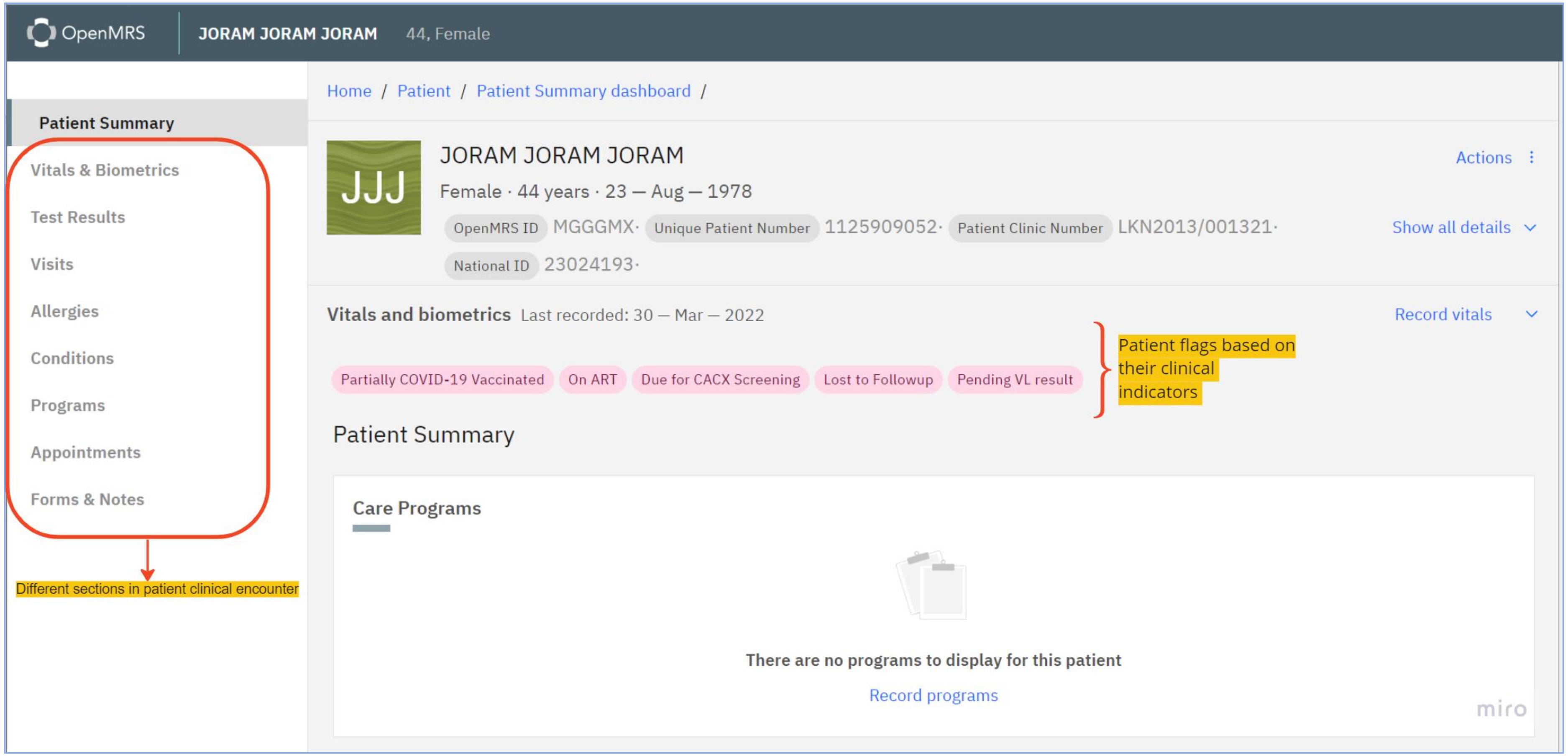
You don't need to create exisiting client details afresh, rather, you only perform a search, locate the patient and open their profile. You can search for existing client either by using their name (any part of the name) or by their client Identifier number. To begin the search, locate the **Search Patient** 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 openrs up their summary dashbaord which contains basic demographihc and clinical details. The figure below illustartes a sample client dachboard with cient specific flags for reference. From here, you can select various sections highlihted on the left below and record encounter information starting from the vitals all the way to Forms & Notes.



Step1: 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.

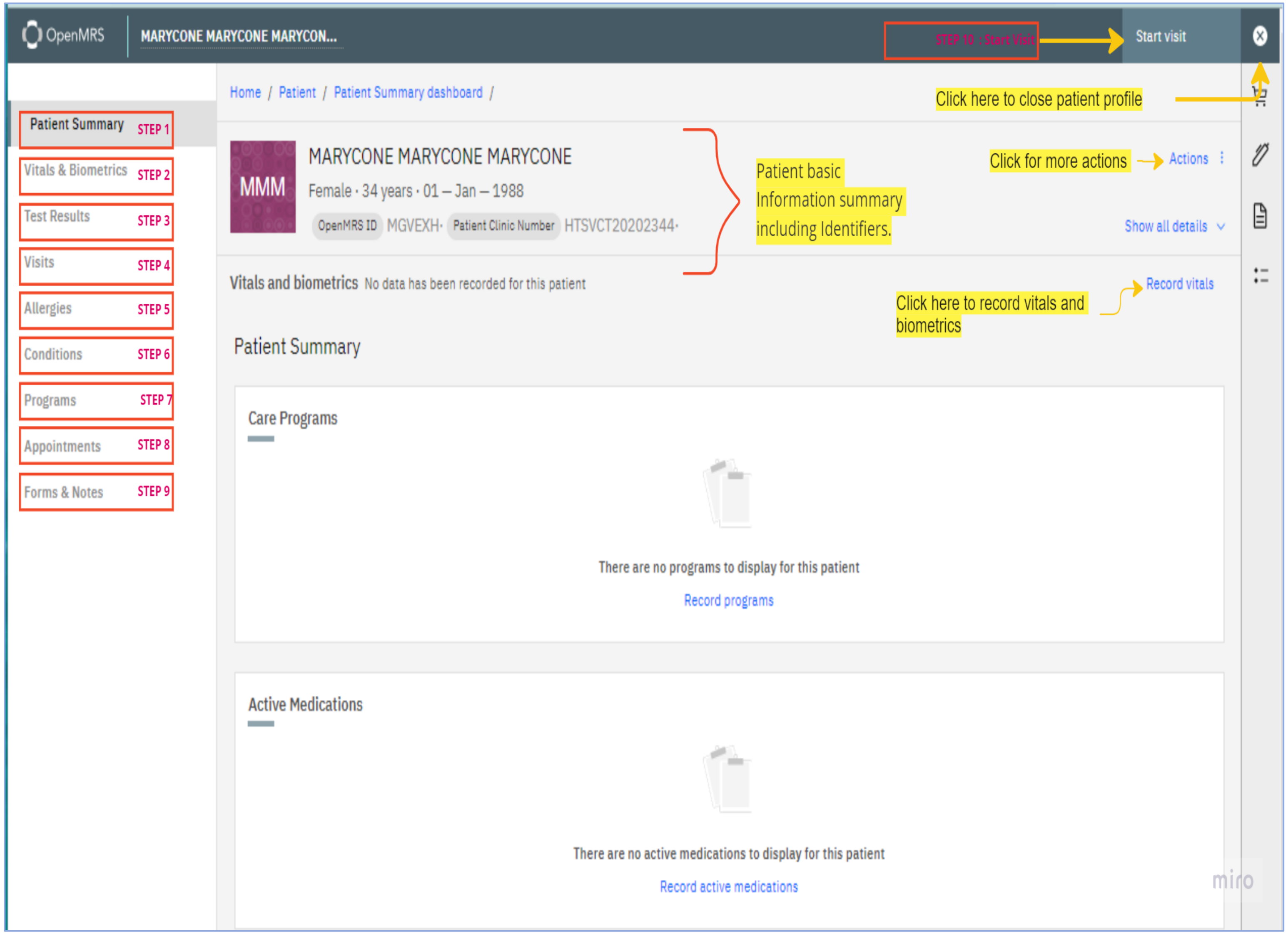
Step 6: Click to show all the documented medical condition for the current client.

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



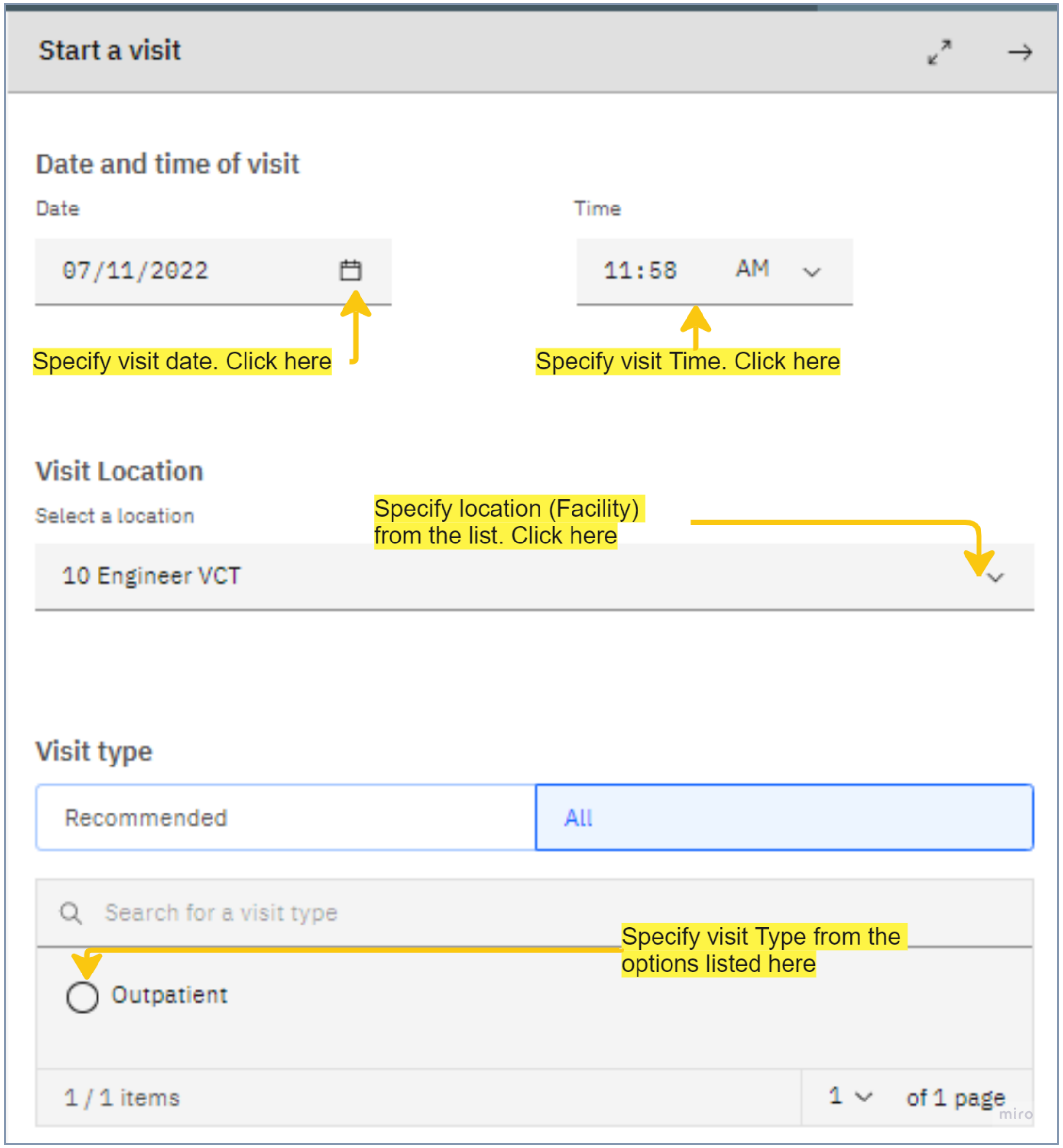
3.2. Starting a visit

To start providing services through the EMR, you need to first Check-in the client by starting the visit. As illustratd 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, clikc "**Start Visit**" button at the bottom to save



3.3. Documenting Vitals and Biometrics.

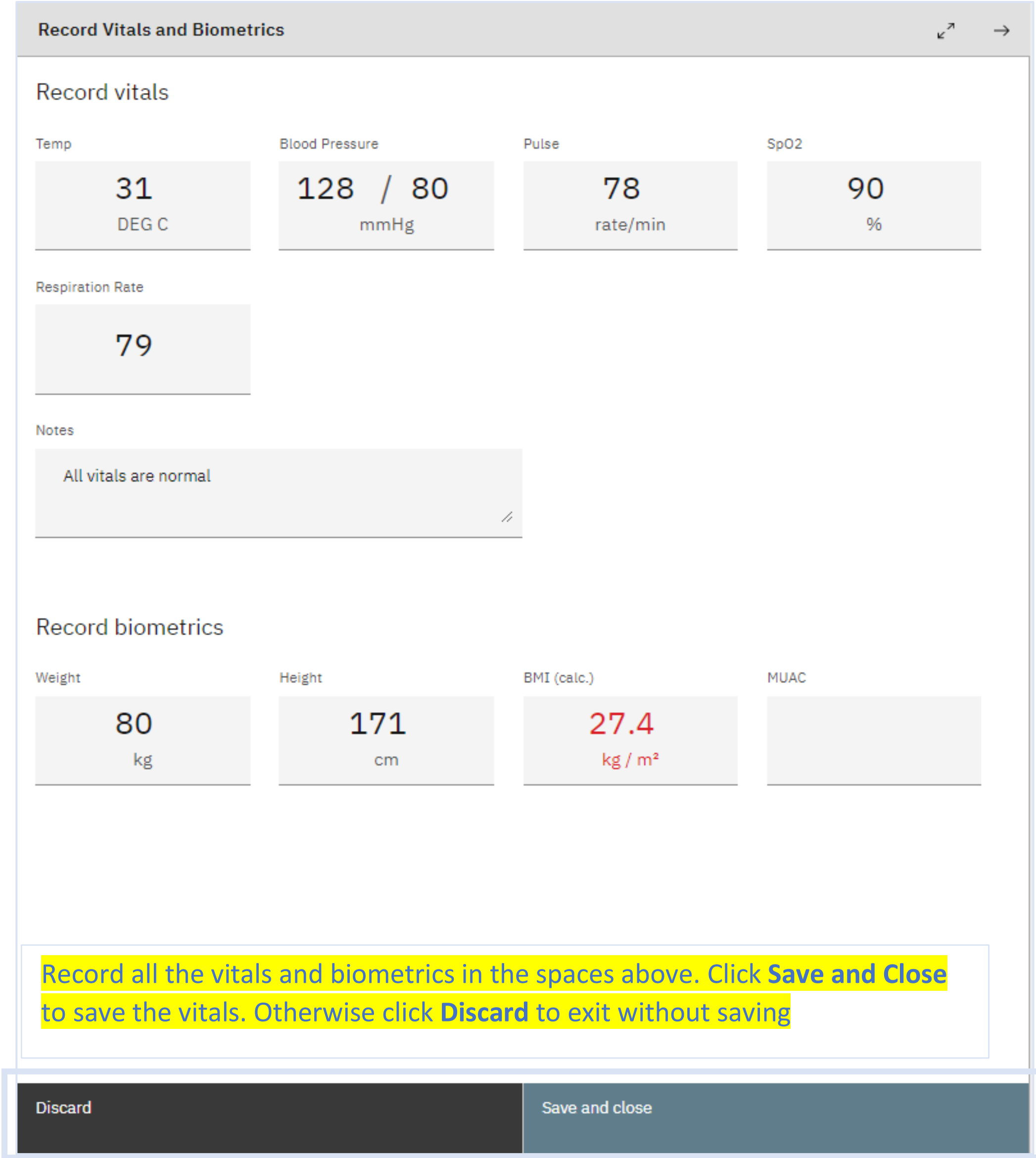
Click **Record Vitals** (refer to figure 3.1 above) to access the vitals and biometrics page. The page has been simplified into two sections i.e. Vitals and Biometrics.

Record all the information in the two sections.

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

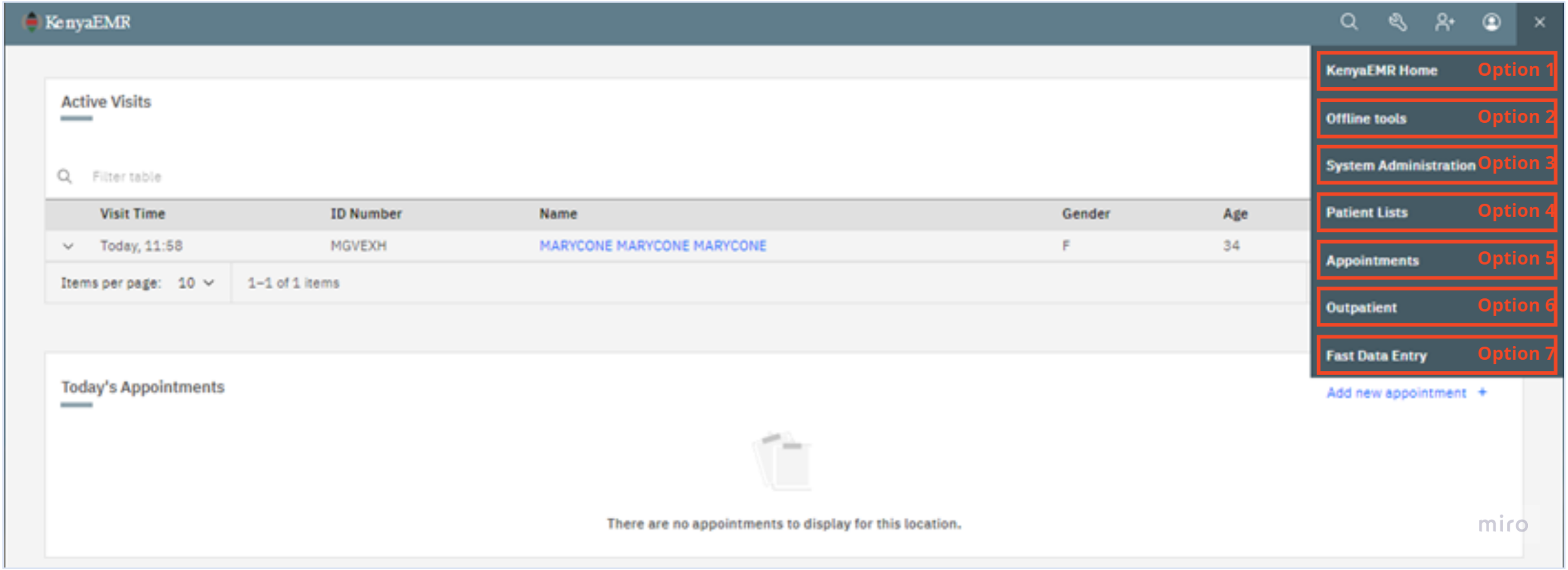
You can also include brief notes on the vitals

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



Part 4: Apointment Management

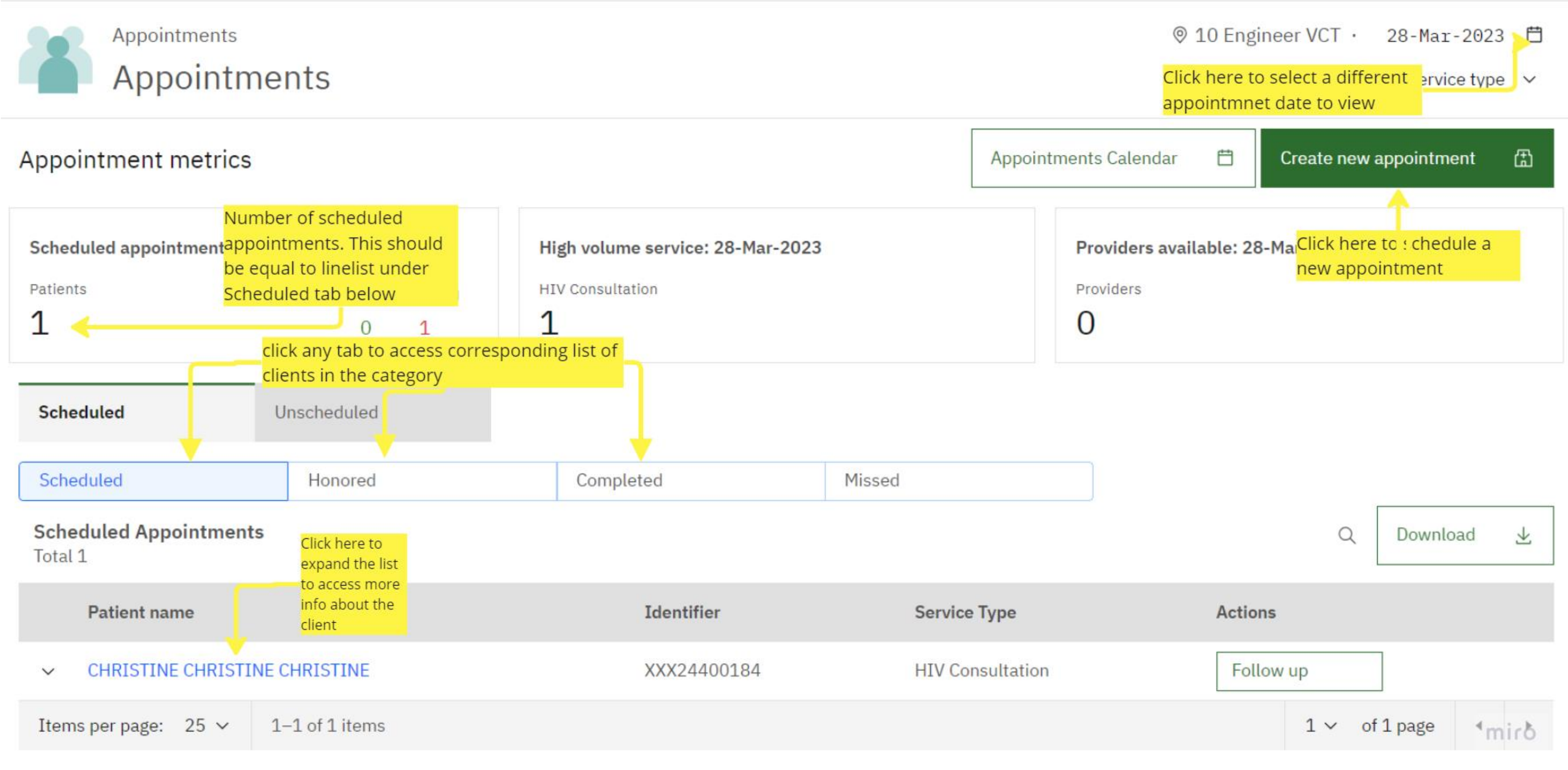
KenyaEMR has been enhanced with a comprehensive appointment management module with all the functionalities of documenting, tracking, amending and scheduling appointments. This module also includes patient queue management with flags for the various urgency priorities. In the next section, we are going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



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: Dsiplays a list of patients in the system
Option 5: Takes you to appoitment management module
Option 6: Opens up the patient Queue managemtn module
Option 7: Provides a quicker way to open specific form and undertake data entry

4.1. Clinical apointment

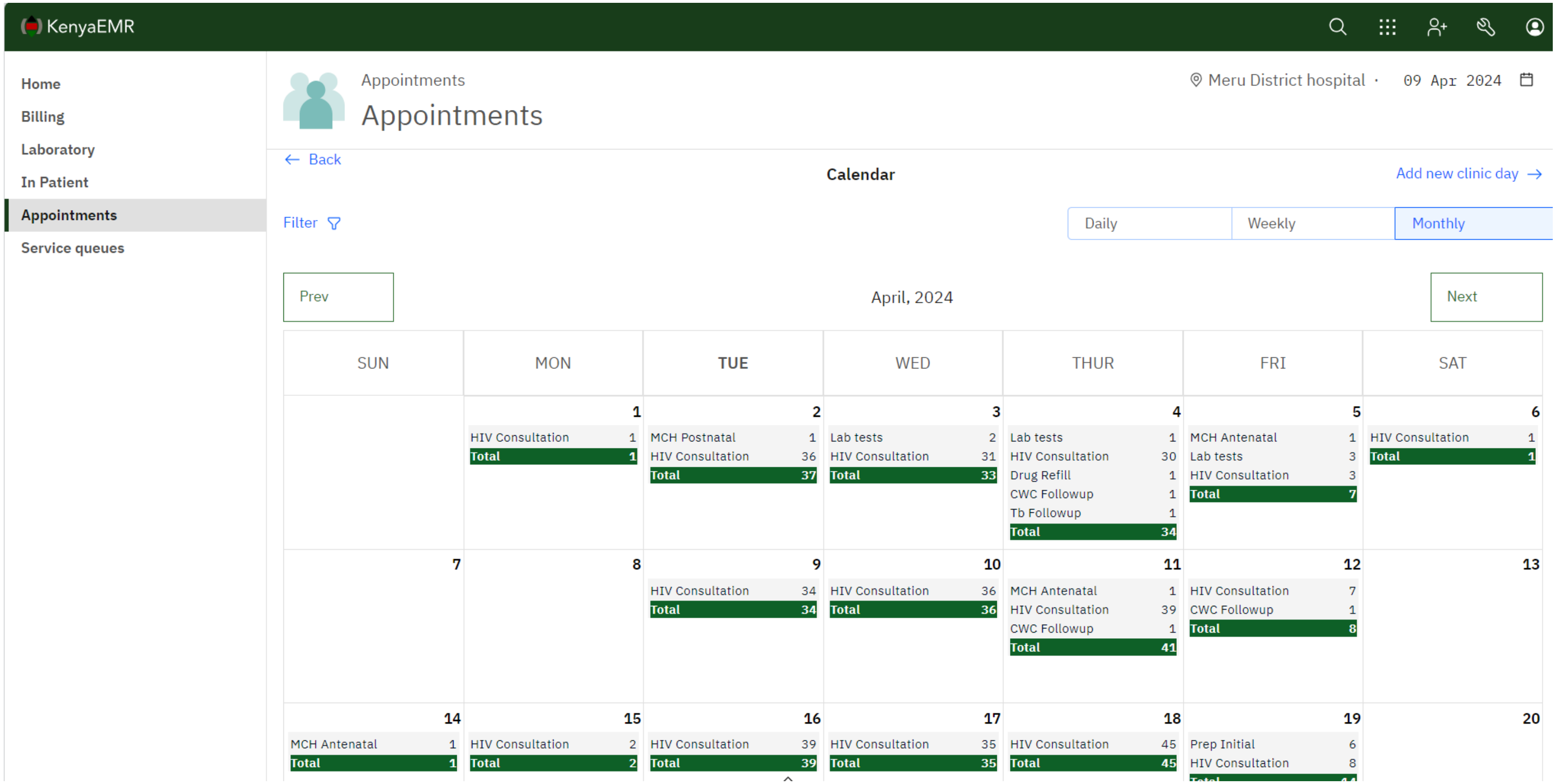
There are several features provided to support patient apointment management in the appointment module. The features include viewing of appointments for specific dates, metrics on the providers available, line list of scheduled clients, cancelled, completed and checked in clients. The figure below illustrates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



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.



4.2. Create a new Clinic Appointment

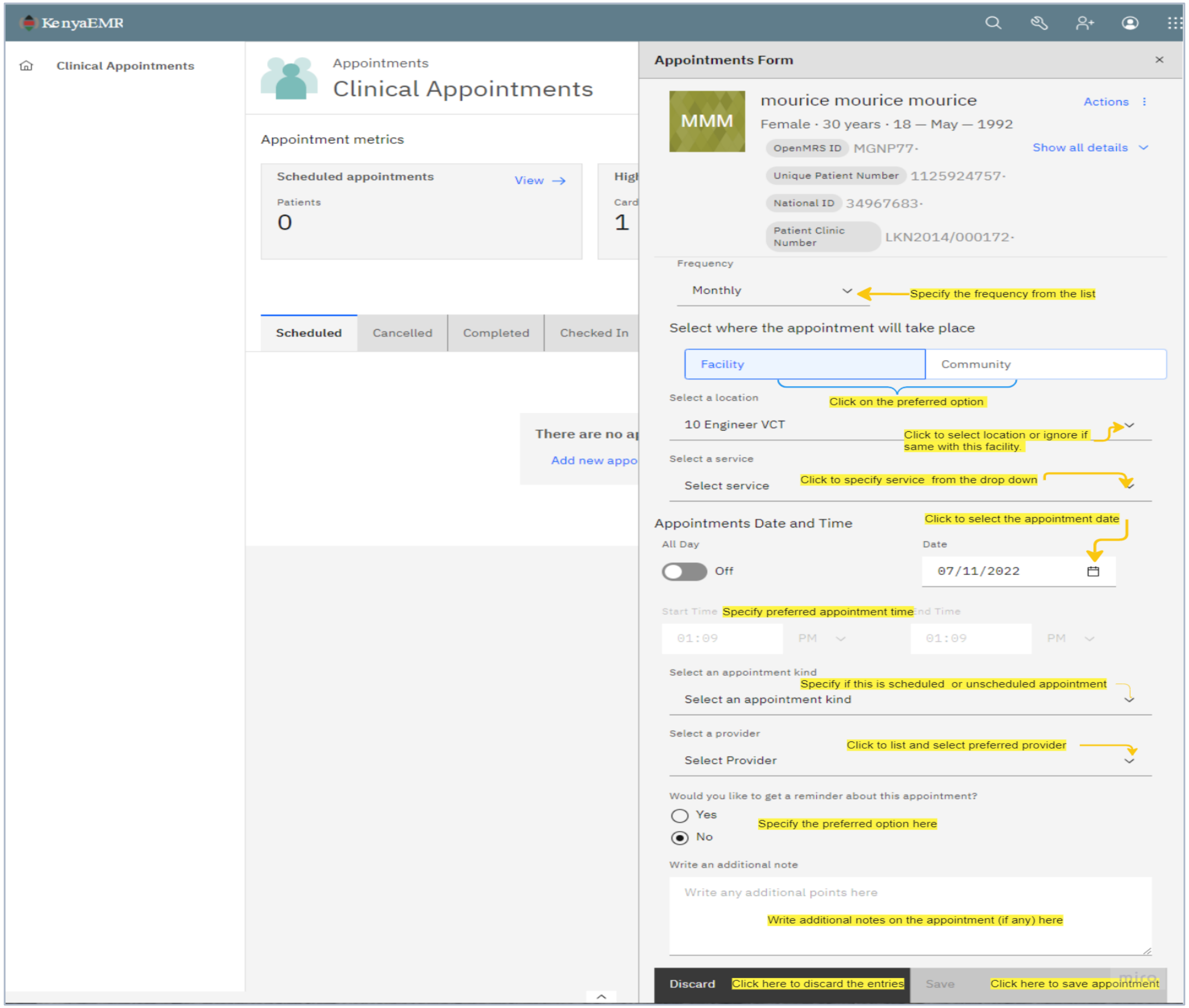
You can create new clinic appointments right from the appointment home page. To do this, click on the **Add New Appointment** (Refer to figure 4.1 above). This will open a side window where you can enter the details for the appointment.

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.

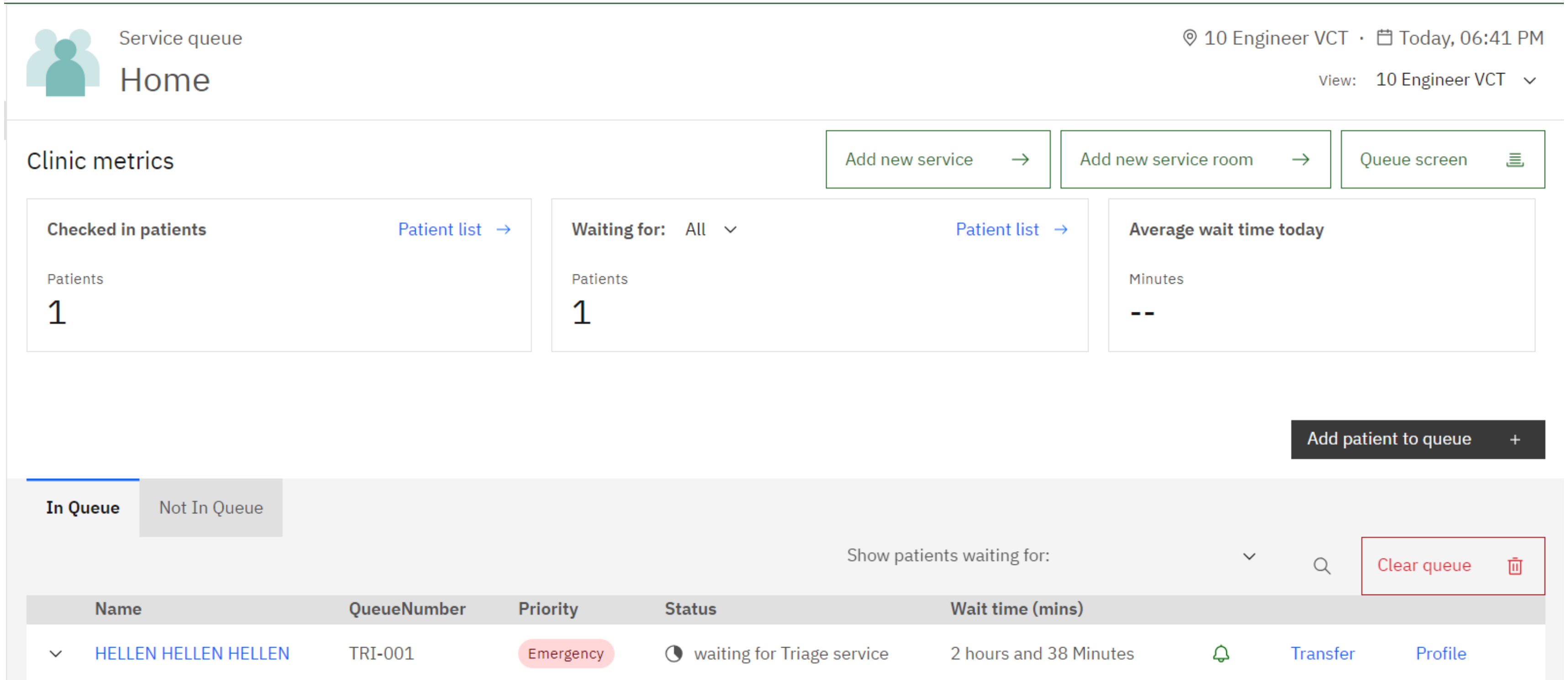
Click on **Save** to submit the form.



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.



4.4. Adding more clients to the queue.

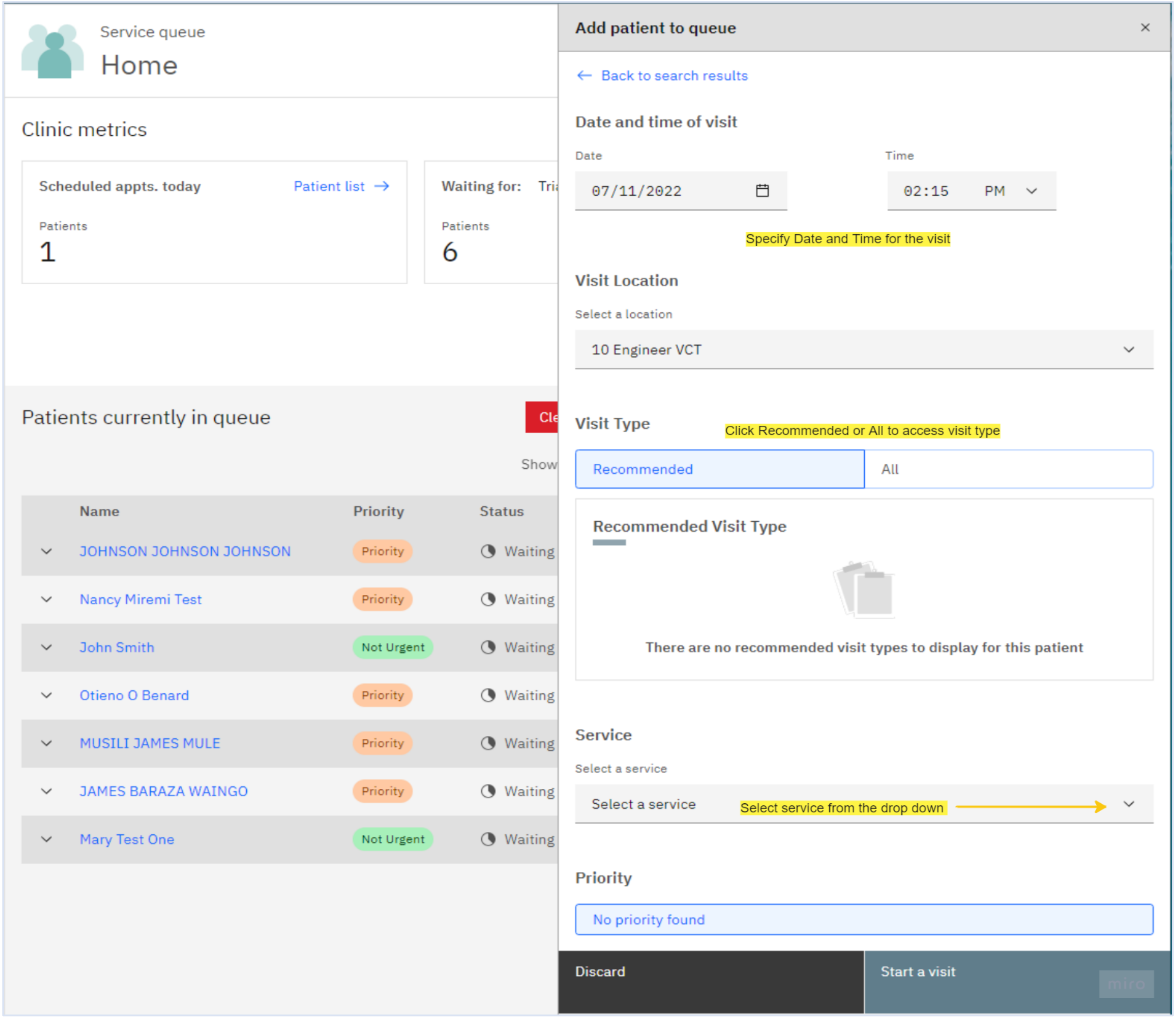
As you check in more patients, you also need to add them to the queue to help determine queue load per service area. To do this, you click **Add Patient to queue** (refer to figure 4.3 above).

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.

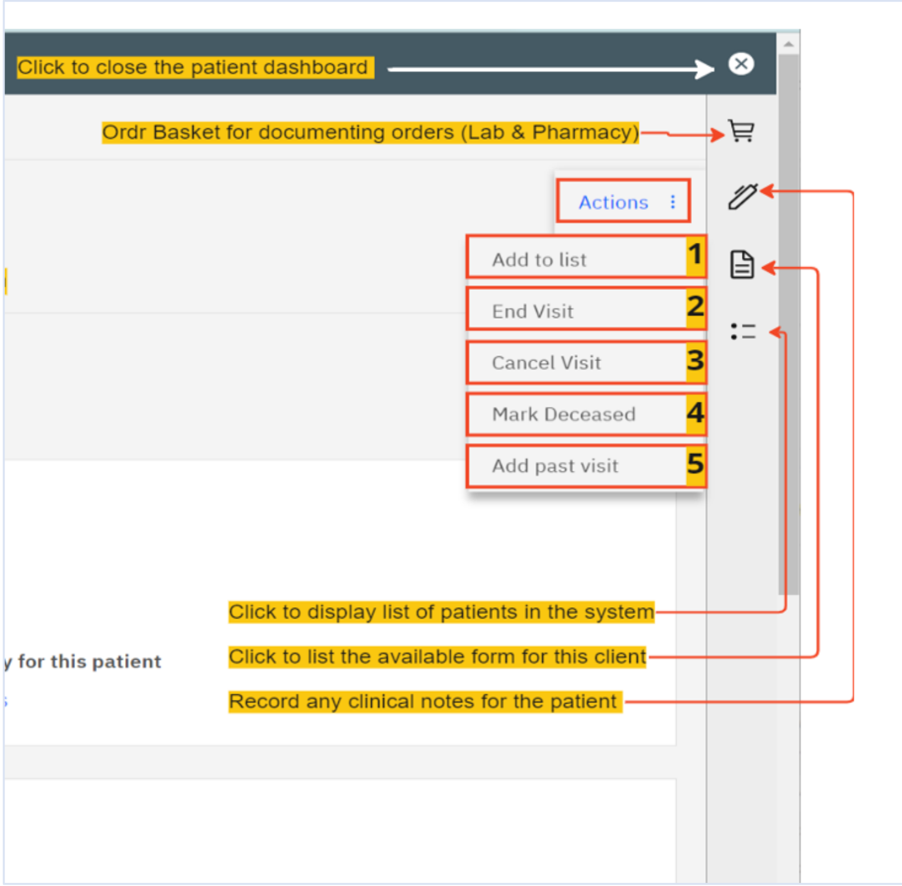
Click Save a visit when done to submit. The patient will be added to the queue for the date specific under the service selected.

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.



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