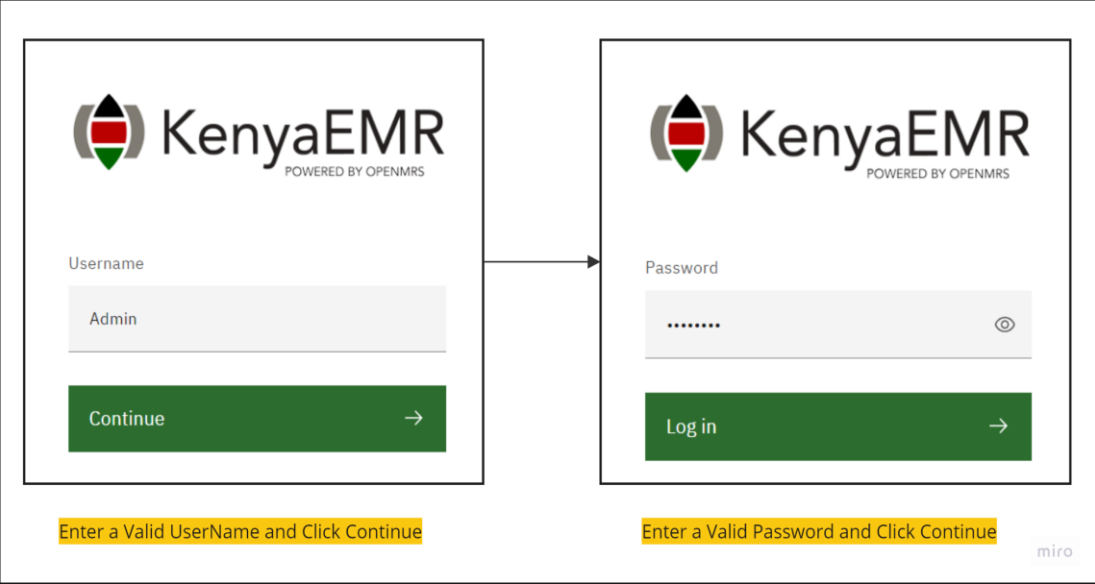


## KenyaEMR Appointment Management Job Aid

(Revised March 2024)

Tasks:	End to end KenyaEMR appointment management workflow
Objective:	To acquire knowledge on appointment management
Who:	EMR user
Required Materials:	Applies to KenyaEMR 3.x Version

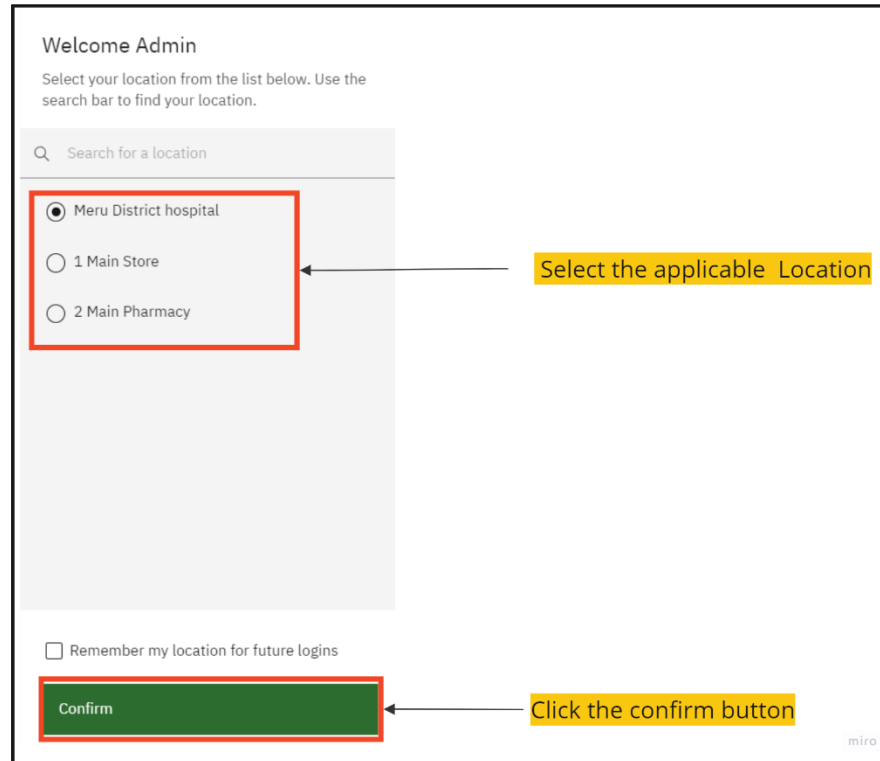
STEP	ACTION
<p><b>1. Login to KenyaEMR</b></p> <p>On successful KenyaEMR system access, you should be navigated to the login page.</p> <p>Authenticate entry by providing a valid username and password on the fields, then click the “<i>Continue</i>” button.</p>	 <p>The screenshot illustrates the login process in two stages. The first stage shows the 'Username' field with 'Admin' entered and a green 'Continue' button. The second stage shows the 'Password' field with masked characters and a green 'Log in' button. An arrow indicates the flow from the first stage to the second. Below each screenshot is a yellow instruction box: 'Enter a Valid UserName and Click Continue' and 'Enter a Valid Password and Click Continue'. A 'miro' watermark is visible in the bottom right corner of the screenshot area.</p>

2.

**KenyaEMR 3.x Landing page**

Select the appropriate location and click Confirm.

Upon successful login, you shall be navigated to the system Landing Page.



Welcome Admin

Select your location from the list below. Use the search bar to find your location.

Search for a location

- Meru District hospital
- 1 Main Store
- 2 Main Pharmacy

Remember my location for future logins






Confirm

miro

Select the applicable Location

Click the confirm button

KenyaEMR

**KenyaEMR 3.x Home page**  
 From KenyaEMR home page, Click Appointment Link to access the Appointment module.

- Home
- Community referrals
- Billing
- Service queues
- Appointments
- Laboratory

### Active Visits

Filter table

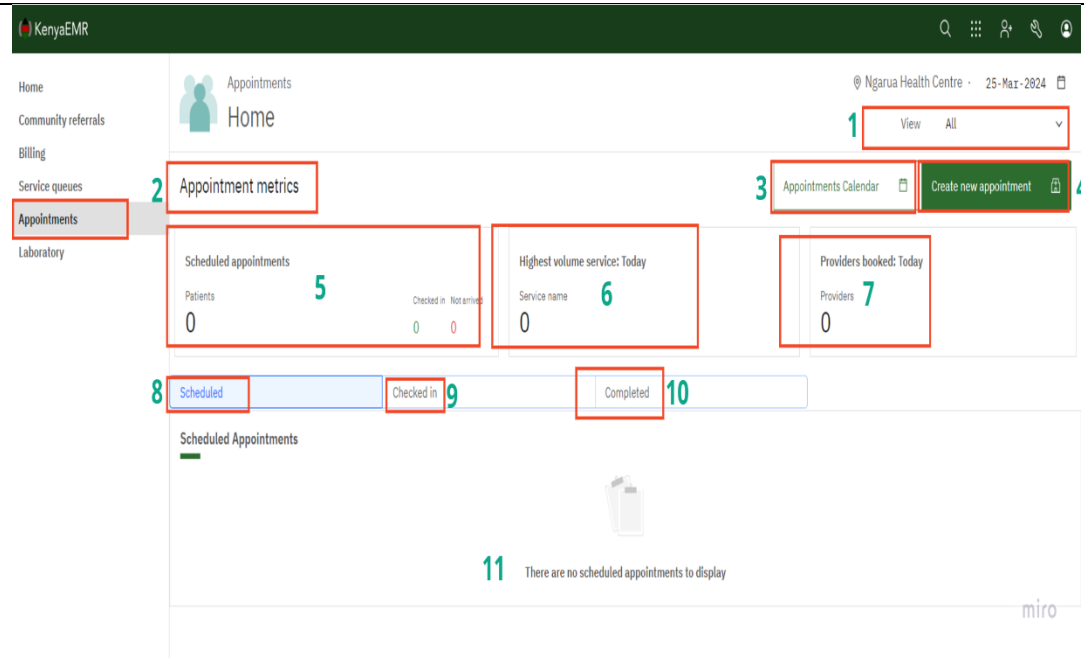
Visit Time	ID Number	Name	Gender	Age	Visit Type
Today, 10:22	MGH6CX	Test Test Test	U	16	Outpatient
28-Mar-2024, 15:49	MGGWD7	akinyi akinyi akinyi	F	22	Outpatient
28-Mar-2024, 15:49	MGK6L4	Test Mwatate Test	M	23	Outpatient
28-Mar-2024, 14:29	MGK7WF	Ooh Vee Cee	M	3	Outpatient
20-Mar-2024, 16:08	MGK69W	Nyandi PT EMR	M	24	Outpatient
20-Mar-2024, 15:23	MGK4WH	Newton LAWI Isack	M	31	Outpatient
20-Mar-2024, 12:18	MGK4UM	bonface okello owiti	M	34	Outpatient
15-Mar-2024, 10:51	MGK4L6	DHIS admin dhis	M	23	Inpatient
15-Mar-2024, 09:52	MGG37E	Maingi Maingi Maingi	F	35	Outpatient
14-Mar-2024, 13:56	MGFNMT	Kimosop Kimosop Kimosop	F	44	Outpatient

Items per page: 10 | 1-10 of 42 items | 1 of 5 pages

3 **Appointment Module Page**

*These appointment metrics help to determine how well appointments are honored by the clients and reflect the reliability of the scheduling system.*

1. **View Service Type:** Navigator that allows a user to select a particular service. That guides the view for the Appointment metrics.
2. **Appointment Metrics:** Appointment metrics are measurements used to evaluate how well appointments are managed within a facility.



3. **Appointment Calendar:** This is a scheduler; a tool used to organize and manage appointments activities by displaying dates and times, enabling users to easily view and plan for upcoming activities.
4. **Create a New Appointment:** Inbuilt functionality that allows a user to create an appointment.
5. **Scheduled appointments:** The total number of appointments booked or scheduled within a given day. This metric reflects the demand for services.
6. **Highest Volume service:** The service with the greatest number of patients scheduled on a particular day.
7. **Providers booked today:** Number of service providers who have patients scheduled in a day.
8. **Scheduled:** A line list of all patients scheduled for a particular day.
9. **Checked-In:** A line list of scheduled appointments where the clients arrived and were checked in at the appointed date.
10. **Completed:** A line-list of patients who honored a scheduled appointment, were checked-in, offered a service and were checked out.
11. **The line list window:** Provides a line list showing the Patient Name, Identifier, service type offered, and actions taken for the client.

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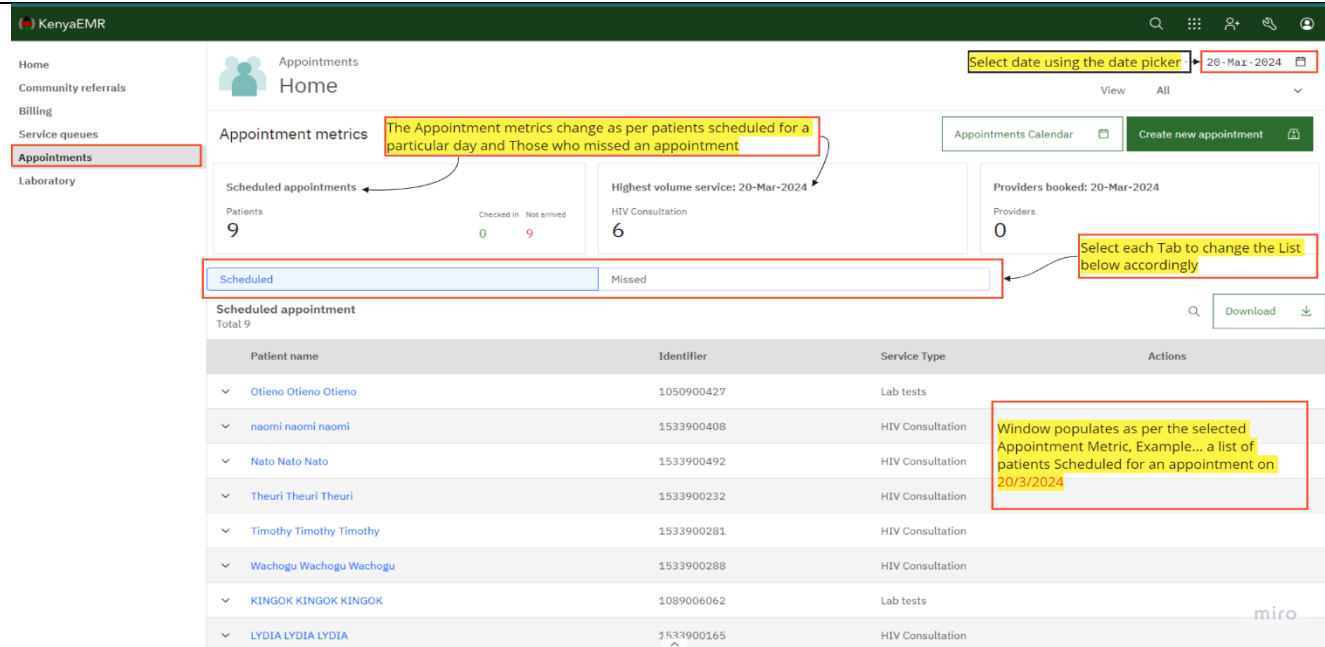
4 **Types of Appointments**

A user can select one or "ALL" Service areas as highlighted.

The screenshot shows the 'Appointments' dashboard for Ngarua Health Centre on 29-Mar-2024. The 'View' dropdown menu is open, highlighting 'All' and 'HIV Consultation'. The dashboard includes appointment metrics and a table of scheduled appointments.

Patient name	Identifier	Service Type	Actions
Mauku Mauku Mauku	1533900151	HIV Consultation	

5 **Appointment Metrics**  
From the Modules menu, click on the Appointment tab.  
Selecting a different date will populate different Appointment Metrics.



The screenshot shows the KenyaEMR interface for the date 20-Mar-2024. The 'Appointment metrics' section displays:

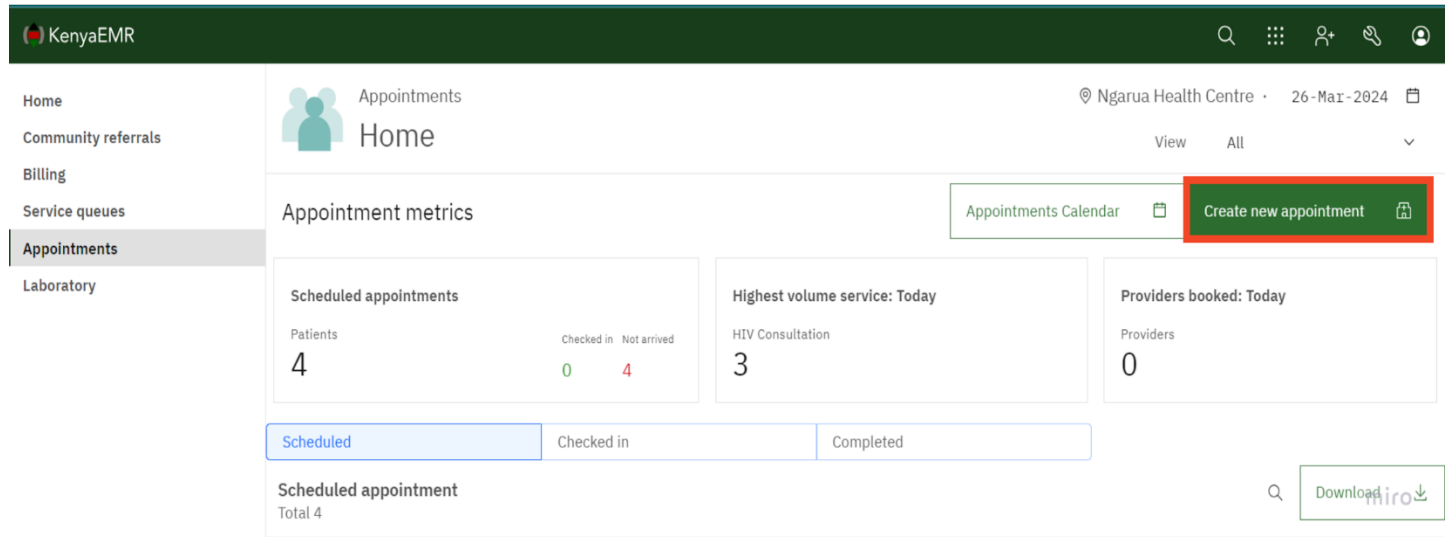
- Scheduled appointments: 9 Patients
- Checked in: 0, Not arrived: 9
- Highest volume service: 20-Mar-2024: HIV Consultation: 6
- Providers booked: 20-Mar-2024: 0

Annotations include:

- A date picker at the top right is highlighted with the text "Select date using the date picker" and shows "20-Mar-2024".
- A yellow box highlights the metrics with the text "The Appointment metrics change as per patients scheduled for a particular day and Those who missed an appointment".
- A red box highlights the 'Scheduled' and 'Missed' tabs with the text "Select each Tab to change the List below accordingly".
- A red box highlights the patient list with the text "Window populates as per the selected Appointment Metric, Example... a list of patients Scheduled for an appointment on 20/3/2024".

Patient name	Identifier	Service Type	Actions
Otieno Otieno Otieno	1050900427	Lab tests	
naomi naomi naomi	1533900408	HIV Consultation	
Nato Nato Nato	1533900492	HIV Consultation	
Theuri Theuri Theuri	1533900232	HIV Consultation	
Timothy Timothy Timothy	1533900281	HIV Consultation	
Wachogu Wachogu Wachogu	1533900288	HIV Consultation	
KINGOK KINGOK KINGOK	1089006062	Lab tests	
LYDIA LYDIA LYDIA	1533900165	HIV Consultation	

6 **Scheduling an appointment**  
Select the "Create new appointment" button.  
A window to search for a patient appears, Search and confirm patient details and click the "Check in" button.



The screenshot shows the KenyaEMR interface for the date 26-Mar-2024. The 'Appointment metrics' section displays:

- Scheduled appointments: 4 Patients
- Checked in: 0, Not arrived: 4
- Highest volume service: Today: HIV Consultation: 3
- Providers booked: Today: 0

Annotations include:

- The 'Create new appointment' button is highlighted with a red box.
- The 'Scheduled' tab is selected in the filter bar.

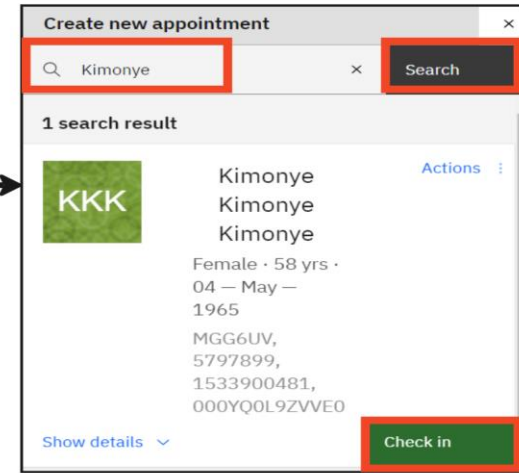
Patient name	Identifier	Service Type	Actions
Otieno Otieno Otieno	1050900427	Lab tests	
naomi naomi naomi	1533900408	HIV Consultation	
Nato Nato Nato	1533900492	HIV Consultation	
Theuri Theuri Theuri	1533900232	HIV Consultation	
Timothy Timothy Timothy	1533900281	HIV Consultation	
Wachogu Wachogu Wachogu	1533900288	HIV Consultation	
KINGOK KINGOK KINGOK	1089006062	Lab tests	
LYDIA LYDIA LYDIA	1533900165	HIV Consultation	

### Create a New Appointment form.

A user can also create an appointment from the below

1. HIV Consultation from the HIV Green card  
By specifying the Return visit date and visit reason
2. Clinical Encounter form  
Creating a new appointment

### Viewing upcoming appointments



### HIV Green Card Form

**HIV Green Card**

Visit Details  
Patient History  
Patient Examination  
**Patient Management**

**Patient Management**

Prophylaxis

\* Prophylaxis used?

Cotrimoxazole  
 Dapsone  
 None

Cotrimoxazole

Cotrimoxazole Adherence

Good (G)  
 Poor (P)  
 Fair (F)  
 Not applicable (N/A)

Cotrimoxazole Dispensed

Yes  
 No  
 Not applicable (N/A)

**Return Visit**

\* Return visit Date:  
20/06/2023

\* Return visit Reason:  
Follow up

\* Willing to receive reminders/notifications about the appointments?  
 Yes  
 No

Save and close  
Discard

### Clinical Encounter Form

**Medical History**

Visit Details  
Patient History  
Patient Examination  
**Patient Management**

**Patient Management**

Diagnosis

**Final Diagnosis**

Add

Treatment/Management Plan

Drug Order

Add drug order

Patient Outcome

Released Home  
 Admit  
 Referral  
 Deceased

Appointments

Add appointments

Save and close  
Discard



**Start a visit**
×

**Visit start date and time**

Date: 26/03/2024 Time: 09:33 AM

**Upcoming appointments**

Select appointment(s) to fulfill

Date	Appointment type	Action
Today, 06:00	HIV Consultation	<input checked="" type="checkbox"/>

7 **Generating Patient scheduled for appointment report.**

**Steps**  
Step 1: Click "HIV" tab  
Step 2: Click "Patients Scheduled for appointment" tab

KenyaEMR 12.0.1, powered by OpenEMR  
Technical University of Mombasa Medical Clinic (1762)

Government of Kenya  
Ministry of Health

Home Reports Logged in as *Kimani Kimani Kimani* My Profile Log Out Help

Common Cohort Analysis **HIV** TB TPT MCH - Mother Services OTZ OVC MCH - Child Services Key Population PREP VMCM

Indicator

- CCQ - Adult C and Tx**  
Continuous Quality Improvement (CQI) Standards for HIV Care - Adult Care and Treatment
- CCQ - Paeds C and Tx**  
Continuous Quality Improvement (CQI) Standards for HIV Care - Paediatric Care and Treatment
- Covid-19 Report**  
Covid-19 report for patients current on ART

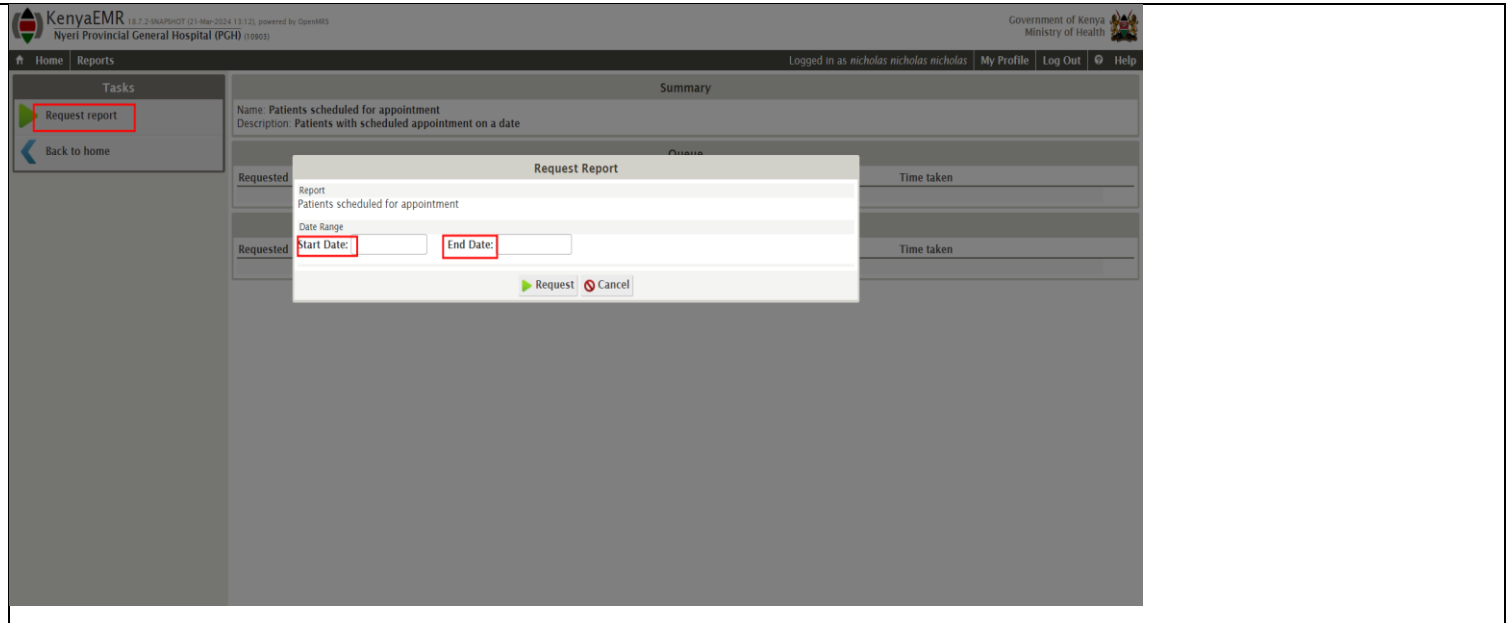
Patient Follow-Up Reports

- DAR Register**  
CCC Daily Activity Register
- Patients who are lost to followup**
- Patients who have never been screened for TB**
- Patients eligible for ART**
- Patients on second line ART**  
Patients on second line ART
- Active patients currently NOT on CTX or Dapsone**
- Patients eligible for Viral Load**
- ART Preparation Register**  
ART Preparation Register
- Enhanced Adherence Register**  
Enhanced adherence Register
- Enrollment Tracker Report**  
Enrollment tracker tool
- ART Register**  
ART register based on art initiation date
- Patients scheduled for ART Drug refill visit**  
Patients with scheduled ART refill visit on a date
- Patients scheduled for appointment**  
Patients with scheduled appointment on a date
- PAMA Report**  
FAMA Report
- Patients with Advanced HIV Disease**  
List of patients with Advanced HIV Disease
- Missed Appointment Tracking report**  
Provides a list of patients who missed an appointment, and the tracing history for the appointment.

8 **Step3:** Click on “Request Report” tab.

**Step 4:** Using the calendar, enter the “start date” and “end date.”

**Step 5:** Click on “Request” button.



KenyaEMR 1.8.7.2-SNAPSHOT (21-Mar-2024 13:12), powered by OpenMRS  
Nyeri Provincial General Hospital (PGH) (10903)

Government of Kenya  
Ministry of Health

Home Reports Logged in as *nicholas nicholas nicholas* My Profile Log Out Help

Tasks  
Request report  
Back to home

Summary  
Name: Patients scheduled for appointment  
Description: Patients with scheduled appointment on a date

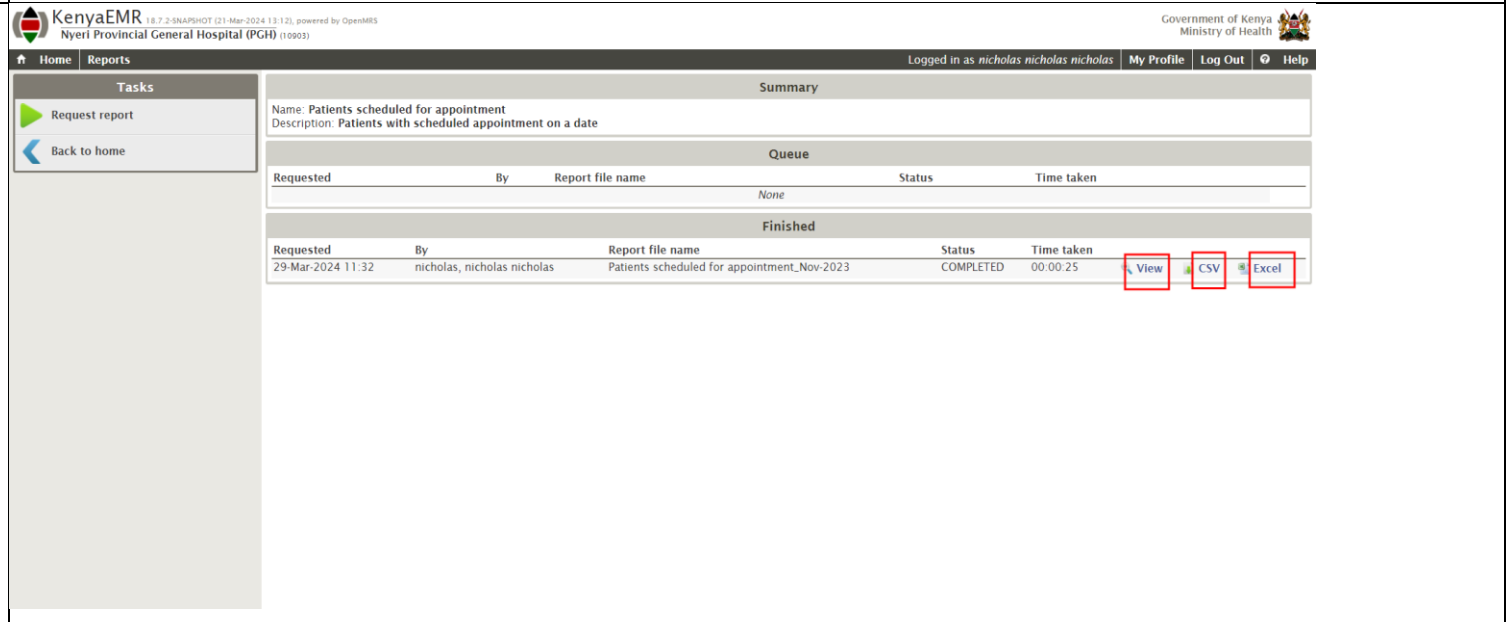
Request Report

Report  
Patients scheduled for appointment

Date Range  
Start Date:  End Date:

Request Cancel

9 **Step 6:** Click on “View, CSV or Excel” button to display patient scheduled for appointment.



KenyaEMR 1.8.7.2-SNAPSHOT (21-Mar-2024 13:12), powered by OpenMRS  
Nyeri Provincial General Hospital (PGH) (10903)

Government of Kenya  
Ministry of Health

Home Reports Logged in as *nicholas nicholas nicholas* My Profile Log Out Help

Tasks  
Request report  
Back to home

Summary  
Name: Patients scheduled for appointment  
Description: Patients with scheduled appointment on a date

Queue

Requested	By	Report file name	Status	Time taken
None				

Finished

Requested	By	Report file name	Status	Time taken	
29-Mar-2024 11:32	nicholas, nicholas nicholas	Patients scheduled for appointment_Nov-2023	COMPLETED	00:00:25	View CSV Excel

10 **Sample Excel output**

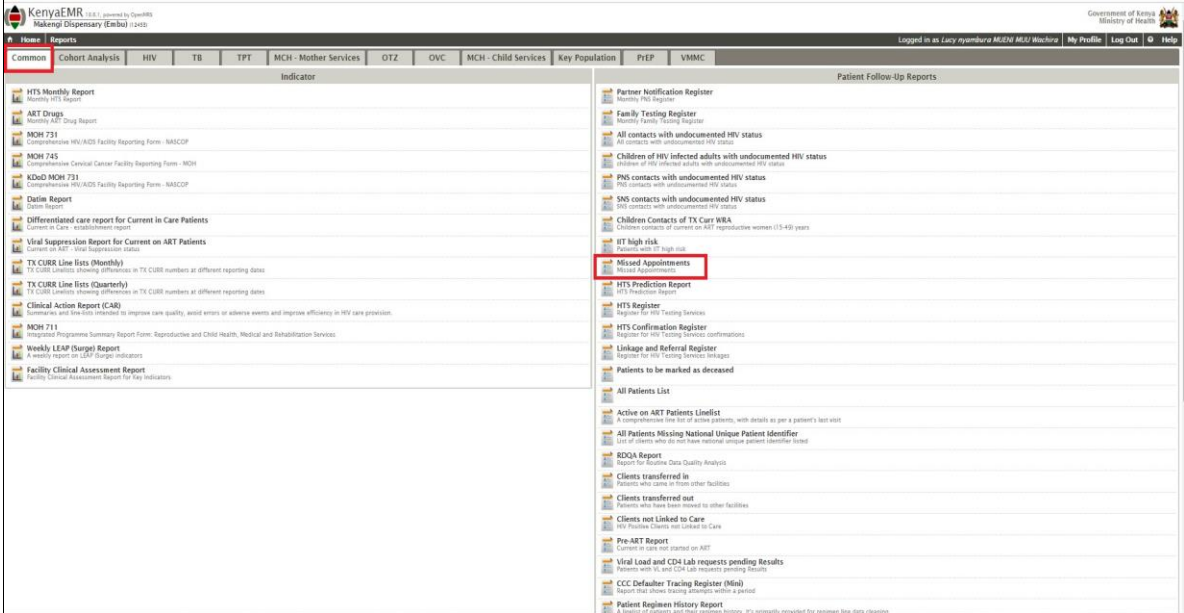
**NB:** The last Column **“Has visit on Day”** a **“Yes”** indicate clients who honored the appointment and a **“No”** indicates clients who didn’t turn up for their appointment.

Patients Scheduled for Appointment								
Health Facility: Makengi Dispensary (Embu) MFL Code: 12453								
Name	CCC No	Age	Sex	Phone Number	Last Visit Date	HIV Appointment date	Last Discontinuation Date	Has Visit On Day
KOBE, KOBE	XXXX93601812	51	F	9.191155961E9	16/12/2022	15/06/2023		No
Valary, Valary	XXXX93601838	43	M	9.19969661E9	15/12/2022	19/06/2023		No
roseke, roseke	XXXX93601863	59	M	9.191999661E9	04/12/2022	04/06/2023		No
IBATU, IBATU	XXXX93601869	54	F	9.11699911E9	16/12/2022	15/06/2023		No
GAD, GAD	XXXX93601883	44	F	9.19996961E9	22/12/2022	14/06/2023		No
EPRAIM, EPRAIM	XXXX93602061	35	F	9.11961991E9	09/12/2022	09/06/2023		No
NGUTA GITUMA, NGUTA GITUMA	XXXX93602095	48	M	9.11999191E9	16/12/2022	15/06/2023		No
AWOI, AWOI	XXXX93602132	49	M	9.199695969E9	11/12/2022	11/06/2023		No
ASCAR, ASCAR	XXXX93602276	49	F	9.119599999E9	30/12/2022	30/06/2023		No
anyona, anyona	XXXX93602392	47	F	9.191999699E9	09/12/2022	09/06/2023		No
BELTA, BELTA	XXXX93602420	35	F	9.199161699E9	04/12/2022	04/06/2023		No
LEONEX, LEONEX	XXXX93602517	42	F	9.199166991E9	05/12/2022	05/06/2023		No
abonyo, abonyo	XXXX93602556	30	F	9.169691916E9	05/12/2022	05/06/2023		No
nasibi, nasibi	XXXX43801328	57	F	9.196996999E9	16/12/2022	15/06/2023		No
OMUNIANGU, OMUNIANGU	XXXX91300061	39	F	9.115919191E9	16/12/2022	15/06/2023	17/03/2015	No

11 **Missed Appointment reporting Steps**

Step 1: Click **“Common”** tab

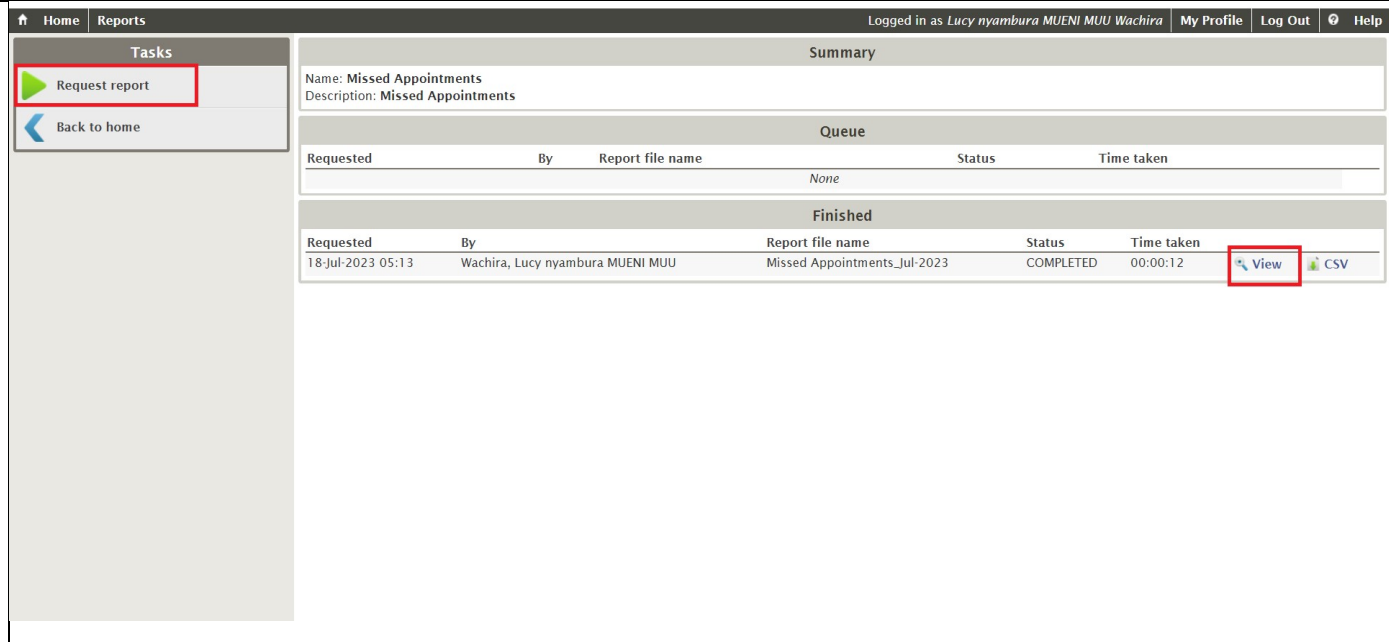
Step 2: Click **“Missed Appointment”** tab



The screenshot shows the KenyaEMR interface for Makengi Dispensary (Embu). The 'Common' tab is selected in the top navigation bar. Under the 'Patient Follow-up Reports' section, the 'Missed Appointments' report is highlighted with a red box. Other reports visible include HTS Monthly Report, ART Drugs, MDH 731, MDH 745, KDdD MDH 731, Datin Report, Viral Suppression Report, TX CURR Line Lists, Clinical Action Report (CAR), MDH 711, Weekly LEAP (Surge) Report, Facility Clinical Assessment Report, Partner Notification Register, Family Testing Register, All contacts with undocumented HIV status, Children of HIV infected adults with undocumented HIV status, PNs contacts with undocumented HIV status, SNS contacts with undocumented HIV status, Children Contacts of TX Carr WKA, RT High risk, HTS Prediction Report, HTS Register, HTS Confirmation Register, Linkage and Referral Register, Patients to be marked as deceased, All Patients List, Active on ART Patients List, All Patients Missing National Unique Patient Identifier, RDQA Report, Clients transferred in, Clients transferred out, Clients not Linked to Care, Pre-ART Report, Viral Load and CD4 Lab requests pending Results, CCC Defaulter Tracing Register (Mini), and Patient Register History Report.

12

Step 3: Click on “Request Report” tab.  
 Step 4: Click on “Request” button.  
 Step 5: Click on “View” button to display missed appointment report.



The screenshot shows the KeHMIS Reports interface. The user is logged in as Lucy nyambura MUENI MUU Wachira. The 'Tasks' sidebar on the left has a 'Request report' button highlighted with a red box. The main content area shows a 'Summary' section for 'Missed Appointments', a 'Queue' section which is empty, and a 'Finished' section with a table of completed reports. The 'View' button for the first entry in the 'Finished' table is highlighted with a red box.

Requested	By	Report file name	Status	Time taken	
None					
Requested	By	Report file name	Status	Time taken	
18-Jul-2023 05:13	Wachira, Lucy nyambura MUENI MUU	Missed Appointments_Jul-2023	COMPLETED	00:00:12	<a href="#">View</a> <a href="#">CSV</a>

**THE END**