Chapter 03 : Patients page

Chapter 01 : Patients page.

How to open the Patients page.

Instructions :

1. Open the homepage.
2. From the homepage, click the Patients toolbar button.

Adding a new patient to the system.

If a patient is not already saved in the system, follow the following steps in this page to add them to the system.

Before proceeding with the instructions in this OMP page it is crucial to familiarize yourself with the various **sections** of the page (i.e. **toolbar, blue ribbon, table and form**). If you are not yet acquainted with this information, please click here.

Instructions :

1. Open the Patients page. Click here to find out how to open this page.
2. Once the page is open with no object currently selected or in focus, you should click on the New Patient toolbar button
3. Proceed through the form inputs, filling out all requred inputs and any additional ones you choose to complete. For efficient navigation, use the **Tab** key on your keyboard to move forward from one field to the next, or the **Shift + Tab** key combination to go back to the previous field.
4. After entering the necessary information, click the Save toolbar button. If there are any required fields left blank, the system will not save the object. Instead, it will draw attention to and focus on the unfilled required field. However, if all inputs are properly filled, the saving process will be successful. After this step, the following actions will take place :
    - The toolbar will transition to **level 2**. This brings up the buttons that are useful after you’ve selected or focused on a specific object (i.e Edit, Delete).
    - The form fields become inactive.
    - The table section becomes active.
    - The search input in the Blue ribbon is enabled.

Search to selection: How to find and choose a patient.

Many patient functions rely on first selecting a particular patient on which an action is to be applied.

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Instructions :

1. Open the Patients page. Click here to find out how to open this page.
2. Locate a patient in the table section by entering a search term into the search field, which is located in the Blue ribbon. You can use any of the following information as your search term :
   - Patient full name
   - Previous names
   - Patient number
   - National ID
   - Medical aid number

   As you type any of the above listed search fields, the table section is updated by filtering out any patients that do not meet the search parameter.
3. After sufficiently narrowing down the table, you can select or focus on a single object by:
   - Navigating the table using the up/down arrow keys on your keyboard.
   - Selecting a specific table row with a left mouse button click.

   An object in focus is distinguished by a blue highlight in the table.

Update patient information.

This page is all about updating patient information.

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Instructions :

1. Find and select a patient. Click here to find out how to do this.
2. Once focused on a particular patient, click the Edit toolbar button. After this step, the following actions will take place :
   - The toolbar transitions to **level 3**. This reveals the buttons that you will use to wrap up the creation or editing processes (i.e Save, Cancel).
   - The fields within the form section are activated. These fields/inputs are intended for specifying the various attributes of the object.
   - The table section is disabled, which means that no other object can be selected.
   - The search input in the Blue ribbon is disabled.
3. Proceed through the form inputs, filling out all requred inputs and any additional ones you choose to complete. For efficient navigation, use the **Tab** key on your keyboard to move forward from one field to the next, or the **Shift + Tab** key combination to go back to the previous field.
4. After entering the necessary information, click the Save toolbar button. If there are any required fields left blank, the system will not save the object. Instead, it will draw attention to and focus on the unfilled required field. However, if all inputs are properly filled, the saving process will be successful. After this step, the following actions will take place :
   - The toolbar will transition to **level 2**. This brings up the buttons that are useful after you’ve selected or focused on a specific object (i.e Edit, Delete).
   - The form fields become inactive.
   - The table section becomes active.
   - The search input in the Blue ribbon is enabled.

How to create a consultation (or an admission).

> If a healthcare center **does not** offer admission services, the forthcoming explanation pertaining to the use of the terms **consultation** and **admission** within this manual may be disregarded. In such instances, any reference to admission within this manual would not be applicable to such a center.

In this manual, the term **consultation** serves as an umbrella term that includes both **consultations** and **admissions**. These two events are managed through a unified interface, with minor variations to accommodate their unique requirements (for instance, the admission interface incorporates a discharge button).

While the interface largely remains consistent, there are instances where differentiation becomes necessary. In such scenarios, the term Consultation is specifically used when the interface is accessed for an **inpatient**, while Admission refers to the interface as it appears for an **outpatient**. An inpatient is a patient who stays in the hospital for one or more nights while receiving treatment. On the other hand, an outpatient is a patient who visits a healthcare facility for diagnosis or treatment but does not stay overnight.

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Instructions :

1. Find and select a patient. Click here to find out how to do this.
2. Once focused on a particular patient, click the Consultation toolbar button to create a consultation (or the Admission toolbar button to create an admission). These buttons are only visible after you have found and selected a particular patient.
3. Select the appropriate option button, which has been pre-set the technical support team. Each button is configured with specific data, such as:
   - The cash portion of the transaction (applicable for both cash and medical aid patients)
   - The claimable portion of the transaction (only for medical aid patients)

   If you cannot find a button that corresponds to the type of consultation or admission you wish to create, please reach out the technical support team for assistance.

4. If your system is set up to use a single practice number (AHFOZ number), the Payments page will open. However, if your system is configured to use multiple practice numbers (AHFOZ numbers), the Practice Number Selection page will appear instead.
   In this page, you will need to enter a valid practice number (AHFOZ number) and then click the Next toolbar button. If the practice number entered is valid, the Practice Number Selection page will close. If the number is not valid, the input field will reset, allowing you to try entering the practice number again. Once the correct practice number has been entered, the Payments page will open.
5. **Payment page :** The Payment page only opens on computers where the **Payment processing setting** is activated. If this setting is deactivated, transactions are processed on a credit basis (applicable only for patients with an enabled credit status), and subsequently, the Change page momentarily opens in place of the Payment page. For further details on the Payment processing setting, please click here.
   The Payment page facilitates the recording of transactions in either a single or multiple currencies, utilizing the system's three payment methods. These payment methods are :
   - Cash
   - Electronic (i.e. bank transfers, mobile money transfers)
   - Credit

   Upon capturing of the full payment, the Process button becomes green and triggers automatically. If the patient is on a medical aid policy, and the transaction being processed includes at least one claim, then the next window which opens is the Claimable Items page. Otherwise the Change page opens.
   In the case that the Claimable Items page is opened, click here for instructions as to how to complete it.
   Ultimately, whether the Claimable Items page is first opened or not, the payment capturing process ends with the opening of the Change page.
   Click here for more information on the Payment page.

Capturing billable items (from the Patients page).

The following instructions apply to billing a patient. This refers to the capturing of services and/or inventory items used for a patient. Such billing can be captured from the Patients page, or from within a consultation.

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> If the patient has an active consultation/admission it is best to capture the billable items from within their consultation.
> The only reason to capture billable items from the Patients page would be if that particular patient does not have an ongoing consultation e.g. When patients buy birth control pills without having to consult a doctor.

1. Find and select a patient. Click here to find out how to do this.
2. Once focused on a particular patient, click the Billable Items toolbar button to open the Billable Items page.
3. If your system is set up to use a single practice number (AHFOZ number), the Payments page will open. However, if your system is configured to use multiple practice numbers (AHFOZ numbers), the Practice Number Selection page will appear instead.
   In this page, you will need to enter a valid practice number (AHFOZ number) and then click the Next toolbar button. If the practice number entered is valid, the Practice Number Selection page will close. If the number is not valid, the input field will reset, allowing you to try entering the practice number again. Once the correct practice number has been entered, the Payments page will open.
4. Search for a service/item using the Code/Descr input. With each keypress the dropdown filters to only diplay services/items whose code, description or tariff code matches the search phrase. Select a service/item from the dropdown by :
   - Clicking "Enter" keyboard button to select the top-most option on the dropdown.
   - Use the mouse to select any visible option from the dropdown.
5. Depending on your system settings, the sales price input can be editable.
6. **Add button :** Click to add another service/item to the cart. This button has an add icon.
7. **Retrieve button :** Opens a window showing a list of previously saved carts. Once retrieved, a saved cart/list can be modified then processed. Lists can also be retrieved from documents. For instructions on retrieving a cart from a document click here.

The retrieve button has a hamburger/list icon.

8. **Save button :** It is designed to temporarily store the current cart. Saving allows you to retrieve and modify your cart’s contents at a later time before final processing. It’s important to note that saving is distinct from processing. While saved billable items represent temporary states, processed transactions are permanently stored in the database.
   The save button has a floppy dist icon.
9. **Process button :** To process/complete the transaction click the Process footer button (button with a receipt icon at the far right of the footer).
   The process button has a receipt icon, and is found at the far right of the footer.

How to create an appointment (from the Patients page).

An appointment can be created from the Patients page, or from within the Consultation page.

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Instructions :

1. Find and select a patient. Click here to find out how to do this.
2. Once focused on a particular patient, click the More toolbar button. This moves the toolbar to expose a different set of toolbar buttons.

Open the Appointment page by clicking the Appointment toolbar button. Enter the patient’s name in the first input field. Select a doctor from the second input field, the doctor selector. Set the appointment’s start time using the date and time input, which is the last input field in the Appointment page. Click the Save toolbar button to save the appointment. To view the list of scheduled appointments, go to the homepage and do one of the following :

- Click the Calendar button on the toolbar.
- Or, use the compact table at the bottom of the homepage to scroll through upcoming appointments. The appointments are listed in chronological order, with the one starting next at the top.

Attaching files/documents (e.g. lab results, pdfs, images).

The system supports saving files in the following formats: PDF, PNG, JPG.

Instructions :

1. Find and select a patient. Click here to find out how to do this.
2. Once focused on a particular patient, click the More toolbar button. This moves the toolbar to expose a different set of toolbar buttons.
3. Click the Attachment toolbar button to open the Attachments page.
4. Click on the file selector input (first input) in the Attachments page. This will open a file explorer window where you can choose one or more files. After making your selection, click ‘Done’ to close the file explorer and return to the Attachments page.
5. Next, on the Attachments page, use the date-time input to set the posting time for the attachments.
6. Click the Next toolbar button to save the attachment(s).

How to view the timeline of a patient.

The timeline of a patient shows consultations, attached files and completed forms in chronological order. To view the timeline do the following :

1. Find and select a patient. Click here to find out how to do this.
2. Once focused on a particular patient, click the More toolbar button.
3. After the toolbar level moves to level 3, click the Timeline toolbar button.
4. Click any event to view it in detail.

View a patient's statement (from the Patients page).

Paperless allows for the assigning of credit to patients. To view a patient's statement follow the following instructions :

1. Find and select a patient. Click here to find out how to do this.
2. Once focused on a particular patient, click the More toolbar button.
3. After the toolbar level moves to level 3, click the Statement toolbar button.