10.03. Patients

Updated version 5.01

In mSupply, patients are a type of name. They are a special form of customer that can have first names, last names, genders and dates of birth. You dispense stock to a patient on a prescription, rather than distributing it to a customer on a customer invoice.

Entering a new patient

You can enter a new patient by clicking on the **Patient > New patient...** menu item to by clicking on the New patient icon on the Patient tab of the navigator.

If you are already creating a prescription and discover the patient is missing you can click on the New patient button on the prescription (Shortcut: Ctl-Shift-P):



Prescription Ent Patient details	ry					
New Patient	Name Code:		Ŧ	De	Addres	h : 00/00/ s :
Prescriber Sea Code:	rch Prescriber	Ţ	Confirm date : Prescription date	00/00/00 28/04/2020	P	eriod 30/
New line Dek	te line(s) Backorders	History Repeats			R	Note
Line Location		tem Name		Qua	n Pa	Batch

Hamp electro	Test disper-	a anu		2.4		Current stores	Test dispensary		
nome store:	reat dispers	odiy		~		Current store:	reat superiously		
Nema				De et el et le e					
			· · · · ·	Restriction					
- code [_	Hold- d	o not issue		Credit limit	0 USD	
Last				Contact					
First				email					
Date of birth	0000/00/00	Age		web site					
-	Eemale	Male		~~~~					
) i cinare	() Hak		Phone	i				
Price Category	A V			Fax					
Other									
Cleat	Nana		Catagony	None	~	Start Date			
Clent	None		Calegory	None	*	Start Date			
Activity	None	~	Category 5	None	~	End Date			
Activity Code	None	\sim	Category 6	None	~	KCA Date			
Flag			Comment	t					
Hais (Differe Address				I					
Main/Dilling Addres	**								
Address 1				L	at		0		
Address 2				Lor	9		0		=
Country [View	on Map			
									Print

- **Code** and **Last** are the only required fields but all applicable fields should be completed so that it is easier to recognise the patient next time. Please note that if there are non-printable characters before or after the **First**, **Last** or **Code** they will be removed. Any non-printable characters in the **First**, **Last** or **Code** (and spaces in the **Code**) will be replaced with an underscore (_).
- The patient code will be filled in automatically for you if the *Auto-generated patient code* preference is turned on (see Setting dispensary mode preferences for details).

If the new patient's date of birth is known, it should be entered, otherwise an entry should be made in the *Age* field; for a patient aged 18 months, valid entries in the *Age* field may be in one of 3 formats, namely 18m, 1.5, or 18/12.

- When a patient's code is known, that patient's record can be rapidly displayed. Note also that the **Male** radio button is checked; if you are entering details of a female patient, remember to check the **Female** radio button!
- Custom fields are available for storing extra information relevant to your situation.

Viewing and editing patient details

You can view a patient's details from a prescription; just click on the patient details button next to their name when they have been selected on a prescription (Note that this button is not enabled until a patient has been selected on the prescription):

New Patient	Name Patient, Test Code: test01		I	Dat	e of birth Address	15/10 3 :
Prescriber Se Code:	arch Prescriber	1	Confirm date Prescription date	e 28/04/2020	Pe	eriod 30
New line Del	iete line(s) Backorder	s History F	Repeats		Re	ference Note
Line Location		item Na	ime	Quan	Pa	Bat

If you are not entering a prescription then you can select the **Show patients** icon on the *Patients* tab of the navigator or click on the **Patients** > **Show patients** menu item:

Show patients
Patient details
Last:
First:
Code:
Search
All names Selection
✓ Exclude hidden names
Complex Find Cancel Find

Enter the details you want to search for the right patient (or leave everything empty to show a list of all patients) and click the *Find* button.

You will be shown a list of matching entries (double-click on the one you want to view or edit), or taken directly to the detail view if only one patient matches the values you entered:

•••		Nan	nes		
)		20/6
New Patient	Find Print Or	der by Merge Modif	У		
Patient Code	Last name	Forename(s)	DOB	Phone	Address
00102/19/00	Moemoe	Alex	29/7/98		Bikenibeu
00107/06/00	Healey	Nora	30/6/39		Teaoraereke
0024/05/00	Malfoy	Draco	17/6/93		Teaoraereke
0027/06/00	Koriander	Basil	30/6/77		Bikenibeu
0027/09/00	Buatia	Ron	30/6/55		Betio
0029/04/00	Potter	Harry	18/2/00		Antebuka
0029/08/00	Weasley	Ginny	30/4/72		Antenon
0046/06/00	Granger	Hermione	12/12/68		
0053/02/00	Erene	John	25/8/99		Teaoraereke
0057/07/00	lareta	Ted	20/1/99		Bikenibeu
0101/34/00	Barenaba	Lucas	29/8/83		Ambo
0102/10/00	Kirata	Quentin	30/6/34		Bikenibeu
0104/05/00	loteba	Emily	30/6/95		Buota
0121/37/00	Nicole	Banteuea	30/6/96		Bikenibeu
0140/37/00	Matiota	atiota Chris 30/6/9			Taborio
0152/20/00	Bountarawa	Andrei	30/6/83		Bikenibeu
0152/27/00	Kaongotao	Ignotus	30/6/88		Nawerewere
0152/39/00	Marshall	Suying	14/4/00		Bonriki
0160/47/00	Auatabu	Rozanna	28/8/85		Buota
0162/33/00	Kaitau	Malala	30/6/98		Buota
L					

Whichever way you access the patient's details, the same window opens:

Home store: Test dispensary General Prescriptions Notes History PMD Backord	Current store: Test dispensary	
Name	Restriction	
Code test01	Hold- do not issue Credit limit 0 U	JSD
First Test	email	
Date of birth 15/10/1963 Age 56.54	website	
O Female Male	Phone	
Price Category A 🗸	Fax	
Other		
Client None Cate	ory 4 None v Start Date	
Activity None ~ Cate	ory 5 None V End Date	
Activity Code None Cate	None V IKCA Date	
rag	inen Age estimated	
Main/Biling Address		
Address 1		
Address 2	Long 0	—
Country	View on Map	Print

Home store

Updated version 4.10 Updated version 4.12

As of version 4.10, you'll notice that at the top of the details window is the **Home store**. For new patients, the home store is the store the patient was created in; for previously existing patients the version upgrade will assign the home store to be the store where the patient was most recently issued a prescription.

- A patient's details can only be edited in any dispensary store which is active on the same site as the home store (i.e. on their **Home site**). This ensures that a patient can only be edited in one location at a time.
- In version 4.10 and 4.11, a patient's *home store* cannot be changed. However, from version 4.12 it will be possible to edit the home store (if you're logged into the primary server). Doing this will make the patient's records (repeats, patient medication records and insurance policies) available to the new home site. If the patient has previous prescriptions from stores which are visible in the new home store, these will also be made available to the new home site, but will only show up in the patient's history if the *Share patient prescriptions over stores* preference is turned on (see setting_dispensary_mode_preferences). Note that you will not be able to edit a patient's details if their record is currently waiting in the sync queue to be transferred to another home store. A "Not editable pending transfer to XX" (where XX is the new home store) message will show at the bottom of the screen and all fields will be disabled if this is the case.
- You can create prescriptions for a patient in any store they are visible in, not just their home store, but repeats can only be processed in any dispensary store on the home site.
- If you're on the primary server, you can make a patient visible in other stores (just like any other type of name) doing this will make the patient's records (repeats, patient medication records and insurance policies, but not their prescription history) available to the store.

The patient detail window tabs

General tab

The date of birth field for a patient uses the same date format as your computer's operating system. If you enter an age, the date of birth is guessed and a patient comment is added to mention that the date was guessed so you know it's not accurate.

Hold do not issue: If this is checked then no stock can be dispensed to the patient

Credit limit: This is the maximum negative value a patient's account can have when the payments module is activated. They will not be able to receive stock on a prescription without paying for it when they reach this limit.

Prescriptions tab

Here each prescription created for the patient in this store is shown. Double-clicking a row in the list will open that prescription.

Notes tab

Any notes/events you enter in the notes tab will display each time you enter the patient name in the *Prescription entry* window. These notes can be used to remind you of patient Preferences for certain dosage forms, or drug sensitivities.

• • •			E	dit patient						
								Store:	General	0
	General	Prescription	s Notes	History	PMR	Backorders	Store			
Snail, Rik			Show							
			Pati	ent events 🕢	JI					
Add event Delete event										
Date. Patient event	Va	alue Units	True		Not	es		E	vent type	
21/12/16 Patient's body weig	ht	84 kg		weighed Mr	Snail	weighs 84kg t	oday Num	eric		

Before you add an event for a patient, you need to make sure that *patient events* have been set up.

Patient events

This is the term mSupply uses to denote any item of information relating to a particular patient; for example, you may want to record the patient's weight, the patient's blood pressure, any allergies from which the patient suffers, vaccination records, etc. - a wide range of information relating to a particular patient may be recorded here.

First, some definitions of patient events need to be made; choose *Patient > Show Patient events* , then click the **New** button.

約 Add patient e	/ent				×
Code:					
Description					
Event type	Text		\sim		
Units					
		Cancel		ОК	
	_	_		_	

One patient event is already defined, the code is `NT', the description is `Note', and the type is *Text*; you can also have events of type *Numeric* or *Boolean*. For example, to create a patient event recording a patient's weight, the completed *Add patient event* window would look like this:

約 Add patient e	vent —		×
Code:	Weight		
Description	Patient's body weight		
Event type	Numeric \checkmark		
Units	kg		
	Cancel	ОК	

A further example, this time using the Boolean type - i.e. where the options are limited to two, `Yes' or `No' - could be to identify patients who have insurance cover to meet the cost of their prescriptions; for this event, the *Add patient event* window, once completed, would appear like this:

🏚 Add patient e		×	
Code:	Ins		
Description	Patient has Insurance for cost of	fmedicine	
Event type	Boolean v		
Units			
	Cancel	O	<

Once a number of patient events have been defined, choosing *Patient > Show Patient events*, will produce a window like this:

🦢 Patient eve	ent list					\times
💽 New	Delete					
Code.	Description	Event type		Unit		
Ins	Patient has Insurance for cost of medicine	BO				\sim
T	Note	DS				
Weight	Patient's body weight	NU	kg			
						~
<	•					>
/3					ОК	

Now it is possible , using the *Notes* tab of the patient details window, to add individual items of information to the profile of any patient.

🏚 Add Patient events	×
Event Search event type Date 22/03/2016	Entered by : user 1 (pass=) Modfied by:
Note	^
	↓
Display when never	Cancel OK

View the record of the patient in the normal way (from *Patient* > *Show Patients, enter the patient's name & double click the appropriate patient from the 'names output'*), and select the *Notes* tab. Click on the *Add event* button to bring up the window shown above.

In the *Event* field, *Search event type* appears by default. To display all the events you have defined so that you may choose the one you require, enter the character "@" (without the quote marks), press the TAB key, and make your required selection from the list.

Alternatively, you may enter a word from the description of the event - e.g. if you have defined *Patient's body weight* as an event, you may enter the start of the event name or code (e.g. *pat*), and that event will appear in the *Event* field. If more than one event matches what you have entered, a list will displayed for your to choose the event you want to enter.

Should you wish to add any note or comment, you may do so by moving the cursor into the Note area, clicking, then typing your entry. You can customise the note in terms of when it will be displayed on screen etc. as described in the Items chapter of this guide. Here's the link - The Notes tab.

Edit Patient Store: General General Invoices Backorders Notes History Show Wagstaff, Winston Al Event type Patient events All Add event Delete event Patient event Value True Date Notes Event type 18/09/2007 Blood Pressure 0 125/98 Job promotion 6 weeks ago - mor Text 01/02/2008 Insurance cover 0 Effective date - 1 Feb 2008 Boolean 22/01/2007 Body weight 69.4 Good improvement Numeric 13/05/2007 Allergies 0 ? allergic to penicillin - rash after 48 hrs tre Text 13/10/2006 Body weight 65 On discharge from 2 months in hospital Numeric Cancel 0K

After a period of time, a patient's notes may look like this:

The default view shows all patient events, but you have the ability to vew single events by selecting the event code from the drop down menu *Patient events* under *Show*

A new event may be added by clicking on the *Add event* button, and an event which is no longer of any relevance may be deleted by clicking on the *Delete event* button.

Events may be edited by selecting the specific event, double clicking on it, when the *Edit patient event* window appears.

History tab

This tab shows a list of all the items dispensed ot this patient. Double-clicking an item will open the

prescription it was dispensed on.

PMR (Patient Medication Record) tab

See the separate section on this here Patient Medication Records

Backorders tab

If you are using a backorder system and you have any backorders for this patient, they will show here.

Store Visibility tab

The tab shows which stores the patient is visible in. Only when the visibility checkbox is checked will the patient be visible to that store. The patient must be visible in a store to be able to create prescriptions for them in that store.

Ineral Prescriptions Notes History PMR Backorders Store Visibility Stores Visibility ug Registration eneral Warehouse ryffndor District Store ygwarts Dispensary ufflepuff Heath Centre uterin Heath Centre uterin uterin <th>Home store: Hogwarts Dispensary</th> <th>Current store: Hogwarts Dispensary</th> <th></th>	Home store: Hogwarts Dispensary	Current store: Hogwarts Dispensary	
Stores Visibility rug Registration	eneral Prescriptions Notes History PMR Backorders Store Vision	bity	
nug Registration eneral Warehouse nyffindor District Store ogwarts Dispensary ufflepuff Heath Centre ytherin Heath Centre ufflepuff Heath Centre	Stores	Visibility	
eneral Warehouse pryffindor District Store pgwarts Dispensary ifflepuff Heath Centre ptherin Heath Centre	rug Registration		
nyffindor District Store pgwarts Dispensary ufflepuff Heath Centre ptherin Heath Centre utherin Heath Centre utherin utherin utherin utherin uthe	eneral Warehouse		
bgwarts Dispensary ufflepuff Heath Centre uterin Heath Centre uterin Heath Centre uterin Heath Centre uterin uterin uterin ute	ryffindor District Store		
ufflepuff Health Centre	ogwarts Dispensary		
ytherin Heath Centre	ufflepuff Health Centre		
	ytherin Health Centre		
>		v	
		>	

Visibility for patients created on a synced system



Remember that in a synced system, patients can be created in any dispensary on any sync site. This is unlike 'normal' Names (customers, suppliers, etc.) that can only be created on the primary server. When a patient is created on any site, it will be made visible in:

- Its home store (i.e. the current store), and
- All other stores of type "Dispensary" which have their store preference *Patients created in other stores not visible in this store* switched **OFF**.

Data that syncs with a patient:

- Their insurance policies
- Their repeats (Note, other sites won't be able to see and use them)



Their PMR records

Data that does NOT sync:

- Transactional/prescription history
- Patient events

While it can be used to make all patients visible across all dispensary stores across all sync sites, use caution with the store pref *Patients created in other stores not visible in this store*. Doing so does not scale well on large systems if it is turned **OFF** for many stores as it causes exponential data growth and sync traffic:



- Initialising a site with 3 dispensaries with the pref off will require syncing 100k patients, and 300k visibility records.
- It does not include prescription data. If it did it'd only add to the above.

Once a patient has been created in a dispensary, its store visibility can then be amended in this tab.

Merging patients while dispensing

Updated version 4.12

While dispensing, you may observe that a patient has been inadvertently entered twice. For example:

•••		Name	s output		
New Patient	Find Print	Order by Merge	dify		15/4
Patient Code	Last name	Forename(s)	DOB	Phone	Address
1	Terraine Contraction	Read	8/01/47	+44 207 234 7646	
3	Manufacture .	100	14/09/83	+44 2973657654	
8	and the second s	Milled .	29/08/58		
9	2000	100	1/01/64	02116537165	
10	Section and	100	14/09/83	+44 207 1234 532	
14	Basic .	No. of Lot.	23/09/85	123456789876	
16	Real	-	7/03/58	0207 456 2020	
17	Sec.	(mark)	19/05/53		
18	20000	ine a	13/03/70	0211546759	
22	anan	NIK	7/03/58		
29	Parasol	George	25/02/43		
25	-044	10	4/06/43		
30	Weiter	(200	10/06/58		
27	Parasol	George	25/02/43		
34	Resault	Taxange.	25/02/43		

When the *Choose patient* window appears, you can highlight the two patients to be merged, then clicking on the *Merge* button displays this window:

Code	27	Code	34
Charge to	27	Charge to	34
Name	Parasol, George	Name	Parasol, George
Address 1		Address 1	
Address 2		Address 2	
DOB	25/02/43	DOS	25/02/43
Gender	Male	Cender	Male
no. of trans	0	no. of trans	0
last trans	00/00/00	last trans	00/00/00

Here you need to decide which record should be kept, and which one should be merged, and check the appropriate radio buttons. This combines the information in the record to be merged with the information in the record to be kept.

Note that, from version 4.12, merging patients will be restricted to only those having the same *home site* - see home_store.

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