



Setting Up and Managing HospitalRun: A Guide for Administrators

Gloria van Trigt

Setting Up and Managing HospitalRun: A Guide for Administrators

Gloria van Trigt



Copyright © 2022 HospitalRun

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the “Software”), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, sublicense, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, subject to the following conditions:

The above copyright notice and this permission notice shall be included in all copies or substantial portions of the Software.

The Software is provided “as is”, without warranty of any kind, express or implied, including but not limited to the warranties of merchantability, fitness for a particular purpose and noninfringement. In no event shall the authors of copyright holders be liable for any claim, damages or other liability, whether in an action of contract, tort or otherwise, arising from, out of or in connection with the Software or the use or other dealings in the Software.

The names of persons and the data reflected in this guide are fictitious and are not intended to represent any real individual, event, or condition. Any resemblance or similarity of the names of persons or data reflected in this guide to any actual person’s name or any event or condition is purely coincidental and unintended.

This edition applies to version 1.0.0-beta, and to all subsequent releases and modifications until otherwise indicated in new editions.

This book was created for an educational assignment only and does not portray work done directly for HospitalRun. Any use of this book is for educational purposes only.

Contact

The OpenJS Foundation
548 Market St. PMB 57274
San Francisco, CA 94104
openjsf.org

hello@hospitalrun.io
hospitalrun.io

Trademarks

HospitalRun™ is a trademark of The OpenJS Foundation
HospitalRun logo™ is a trademark of The OpenJs Foundation
CPT® is a registered trademark of the American Medical Association
Microsoft® is a registered trademark of Microsoft Corporation
Excel™ is a trademark of Microsoft Corporation



Table of Contents

Preface

About HospitalRun.....	vii
HospitalRun's vision and purpose.....	vii
Who should use this guide.....	viii
Downloading and opening HospitalRun.....	viii
Date and time formats in HospitalRun.....	ix
Overview of the HospitalRun menu	ix

Chapter 1: Setting up HospitalRun

Setting up your initial account	1
Entering your hospital's information in the Print Header.....	2
Creating and managing Users.....	3
User Roles	3
Adding a User.....	3
Editing a User account.....	4
Editing permissions for Users.....	4
Populating HospitalRun's databases	5
Introduction to Lookup Lists	5
Limitations of Lookup Lists.....	6
Importing and manually adding data to Lookup Lists.....	6
Tips for formatting a file for a successful import	7

Adding data in menus instead of Lookup Lists.....	8
Creating Pricing Items.....	8
Introduction to Pricing Profiles	9
Scenario 1: Using a Pricing Profile for a percent discount.....	9
Scenario 2: Using a Pricing Profile for overrides.....	10
Creating a Pricing Profile	11
Applying overrides with Pricing Profiles	12

Chapter 2: Working with patient files

Searching for an existing patient.....	15
Overview of a patient chart	16
Overview of tabs in a patient chart.....	17
Entering a new patient	19
Editing a patient's file.....	19
Generating Patient Reports	20
Exporting Patient Reports.....	20
Custom fields and forms for patient files.....	21
Setting Address Fields.....	21
Introduction to Custom Forms	22
Creating and using Custom Forms	23
Using Custom Forms	24
Editing Custom Forms.....	24

Chapter 3: Working with the schedule

Scheduling a new appointment.....	25
Editing an appointment	26
Marking appointments as canceled or missed	27
Different ways to view upcoming appointments	28
Using the Appointment Search.....	28
Introduction to checking in patients.....	29
Checking in patients who have a scheduled appointment	29

Checking in new walk-in patients.....	30
Checking out patients.....	31
Chapter 4: Creating and billing patient invoices	
Introduction to adding charges to a patient's file	33
Adding charges for procedures	33
Adding a procedure to a Visit.....	35
Adding charges for non-procedures.....	36
Adding a deposit to a patient's account	37
Introduction to creating and editing invoices.....	37
Overview of the Billing menu.....	38
Creating an invoice	38
Adding room charges to an invoice	39
Applying discounts and alternate pricing with Pricing Profiles	39
Applying deposits to an invoice.....	40
Adding payments to an invoice	41
Appendix A: Lookup List Types	43
Appendix B: Patient Report Types.....	47
Glossary	51
Index.....	53



Preface

In the preface:

- About HospitalRun
- Who should use this guide
- Downloading and opening HospitalRun
- Date and time formats in HospitalRun
- Overview of the HospitalRun menu

About HospitalRun

Welcome to HospitalRun. HospitalRun is a health information system (HIS) and practice management tool. It is designed for clinics and hospitals where one instance is enough for the team, whether because of the team size or a resource constraint. You can use HospitalRun to:

- collect, store, and manage a patient's electronic medical record (EMR).
- schedule patient appointments.
- manage hospital and clinic inventory.
- create and bill invoices.
- track hospital and clinic incidents.

Everyone in your clinic or hospital can use HospitalRun.

HospitalRun's vision and purpose

HospitalRun doesn't need internet or a lot of technology to work—in fact, your team can use HospitalRun on a single, shared device. Our vision is that clinics and hospitals in remote areas that do not have the resources for cloud-based or server-based software can still benefit from an electronic HIS. Additionally, you can take HospitalRun with you in field care and mobile clinics.

Read more about our vision and journey here: [Why HospitalRun?](#)

Who should use this guide

This guide is for hospital or clinic administrators who are both managing the day-to-day aspects of the clinic and taking care of the general patient-facing administration.

Downloading and opening HospitalRun

You can download HospitalRun directly from our [website](#). If you are using Windows or Linux, you must unzip the folder before you can open HospitalRun. If you are using Mac, you can open the downloaded folder right away.

To download HospitalRun

1. Open HospitalRun's [Download page](#).
2. Click one of the following files

Operating system	File name
Windows	HospitalRun-win32.zip
Mac	HospitalRun.dmg
Linux	HospitalRun-darwin-x64.zip

The download starts automatically and is saved in your system's Downloads folder.

To unzip the HospitalRun folder in Windows or Linux

1. Locate the downloaded folder in your system's Downloads folder.
2. Do one of the following

To unzip in Windows	To unzip in Linux
<ol style="list-style-type: none"> 1. Right click the folder. The options menu opens. 2. Click Extract All... The Extract Compressed Folders dialog box opens. 3. Click Extract. 	<ol style="list-style-type: none"> 1. Right click the folder. The options menu opens. 2. Click Extract Here.

The unzipped folder opens.

You can now open HospitalRun by double clicking the **HospitalRun** file in the HospitalRun folder (see Image i.i).



Image i.i: The HospitalRun application as it displays in the downloaded folder

Date and time formats in HospitalRun

You cannot change the date and time formats in HospitalRun. Table i.i shows the date and time formats in HospitalRun.

Type	Format
Date	MM/DD/YYYY
Time	12-hour
Week	Sunday–Saturday

Table i.i: Date and time formats in HospitalRun

Overview of the HospitalRun menu

The menu in HospitalRun lists the main menu options (see Image i.ii).

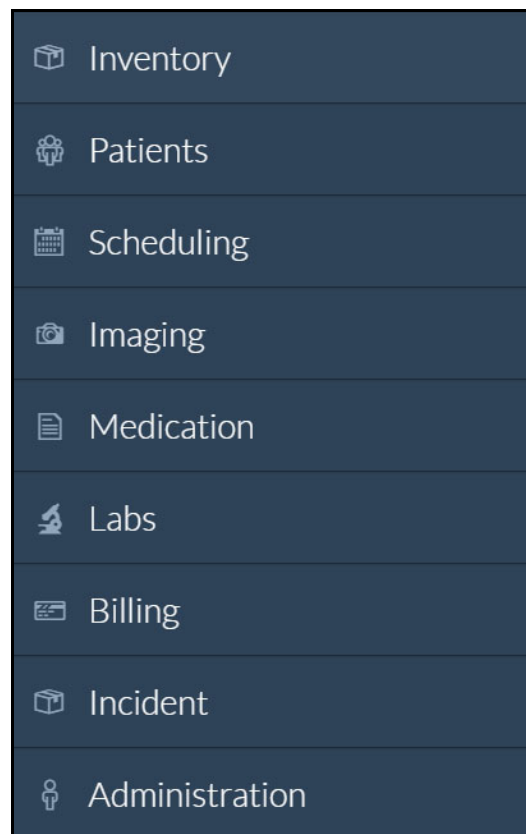


Image i.ii: The main menu in HospitalRun

You can click on each main menu item to expand the menu options. Image i.iii shows how the Administration menu expands when you click it.

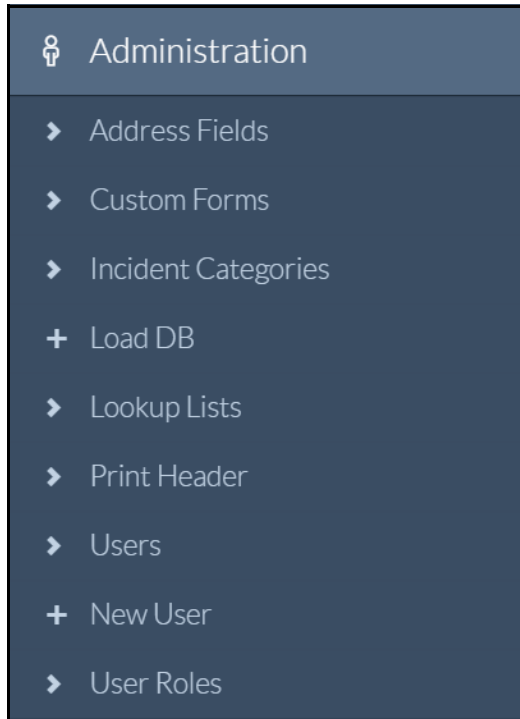


Image i.iii: The Administration menu expands to show the menu options



Chapter 1: Setting up HospitalRun

In this chapter:

- Setting up your initial account
- Entering your hospital's information in the Print Header
- Creating and managing Users
- Populating HospitalRun's databases

HospitalRun comes with many empty fields and drop-down menus so you can customise it with only the options you need. Since you can customise HospitalRun to a high degree, it does take time up-front to set up. This section covers setting up Users and adding custom options to the fields and drop-down menus.

Setting up your initial account

When you first download and open HospitalRun, it is already signed in to the "hadmin" user account, which is the System Administrator account. You must set up the password for this account before using HospitalRun.

If you haven't already downloaded HospitalRun, see "Downloading and opening HospitalRun" on page viii.

Caution: The "hadmin" user is the only user that can reset usernames and passwords. If you do not set a password and you log out, you will not be able to sign in to the "hadmin" account.

To set the password for the “hadmin” User account

1. Click **Administration**.
The Administration menu expands.
2. Click **Users**.
3. Click **hadmin**.
The Edit User window opens.
4. Type your email address in the **Email** field.
5. Type the password you want to use in the **Password** field.
6. Click **Update**.

The System Administrator role can use every feature in HospitalRun. You may want to create a Hospital Administrator User account for yourself to keep your daily tasks separate from the System Administrator. See “Adding a User” on page 3.

Entering your hospital’s information in the Print Header

You can enter your hospital’s contact information into HospitalRun so that anything you print has this information on the header. The Header Options window allows you to enter your facility name and a URL for your logo. It also gives you three blank fields to enter any other information you want to include on each line. You may want to include:

- The hospital’s address
- The hospital’s phone number
- The name of the hospital’s physician

To enter your hospital’s information in the Print Header

1. Click **Administration**.
The Administration menu expands.
2. Click **Print Header**.
The Header Options window opens.
3. Type your hospital’s name in the **Facility Name** field.
4. Type the information you want to show beneath the hospital name in the **Header Line 1** field.
5. (Optional) Type the information you want to include in the **Header Line 2** field.
6. (Optional) Type the information you want to include in the **Header Line 3** field.
7. (Optional) Type the URL of your hospital’s logo in the **Logo URL** field.
Note: You can only link a logo; you cannot import an image.
8. Click **Update**.
The Options Saved dialog box opens.
9. Click **Ok**.

Creating and managing Users

You can create a User account for everyone in your hospital who will use HospitalRun, whether in a patient-facing role or a patient-management role.

Note: Users cannot reset their own passwords. As the System Administrator, you can reset passwords for all Users. However, if you forget your login for the System Administrator account ("hradmin"), you cannot recover it. Keep note of your login in a safe place.

User Roles

HospitalRun has built-in User Roles that you can choose from when setting up User accounts. You cannot add or delete User Roles, but you can edit the permissions of each role. The permissions control what functions a User can access. See "Editing permissions for Users" on page 4.

Adding a User

You can create a User account in the Administration menu. Users log in to HospitalRun using the email and password you create.

To add a new User

1. Click **Administration**.
The Administration menu expands.
2. Click **New User**.
The New User window opens.
3. Type the name you want to display in HospitalRun in the **Display Name** field.
4. Type the email address in the **Email** field.
5. Type the password in the **Password** field.
6. Select the User's role from the **Role** drop-down menu.
7. Click **Add**.
The User Saved dialog box opens.
8. Click **Ok**.

Editing a User account

You can edit a User's Display Name, email address, password, and User Role. You must sign in as the System Administrator to edit a User account. Users cannot edit their own account information.

To edit a User account

1. Click **Administration**.
The Administration menu expands.
2. Click **Users**.
The User Listing window opens.
3. Beside the User you want to edit, click **Edit**.
Note: You can also delete a User by clicking **Delete**.
4. Type into the field you want to edit.
5. Click **Update**.
The User Saved dialog box opens.
6. Click **Ok**.

Editing permissions for Users

You can edit a User's permissions as the System Administrator.

Permissions turn features on or off in HospitalRun for a specific User Role. For example, the Pharmacist role has permissions for the Medication and Inventory menus, but the Patient Administration role does not have permissions for adding, deleting, or fulfilling medication or for managing inventory.

HospitalRun has preset permissions for each User Role. However, you may want to edit the permissions for overlapping roles so that Users do not have to switch between accounts to use different features.

Note: You cannot edit permissions for a specific User. When you edit permissions for a User Role, the changes apply to all Users with that Role.

To edit permissions for a User Role

- 1. Click **Administration**.
The Administration menu expands.
- 2. Click **User Roles**.
The User Roles window opens.
- 3. Select the User Role you want to edit from the **Role** drop-down menu.
- 4. Check or uncheck the features you want to edit.
Note: The features are grouped by menu item.
- 5. Click **Update**.
- 6. Click **Ok**.

Populating HospitalRun’s databases

Many of the fields and drop-down menus in HospitalRun come empty so you can customise them. You must add the data you need in these fields and drop-down menus into HospitalRun. You add most data to Lookup Lists (see “Introduction to Lookup Lists” on page 5). You add other data directly in the menu that holds the field or drop-down menu since other User Roles are able to edit the data (see “Adding data in menus instead of Lookup Lists” on page 8)

Introduction to Lookup Lists

Lookup Lists are like databases that hold the list of options you want to use in a field or drop-down menu.

See “Appendix A: Lookup List Types” on page 43 for a list of every Lookup List Type, the corresponding field or drop-down menu name, and the location in the main menu.

An example of a Lookup List is the Physician drop-down menu. When you add your hospital’s physicians to the Lookup List (see Image 1.1), Users can select a physician from the drop-down menu when they make an appointment for a patient (see Image 1.2).

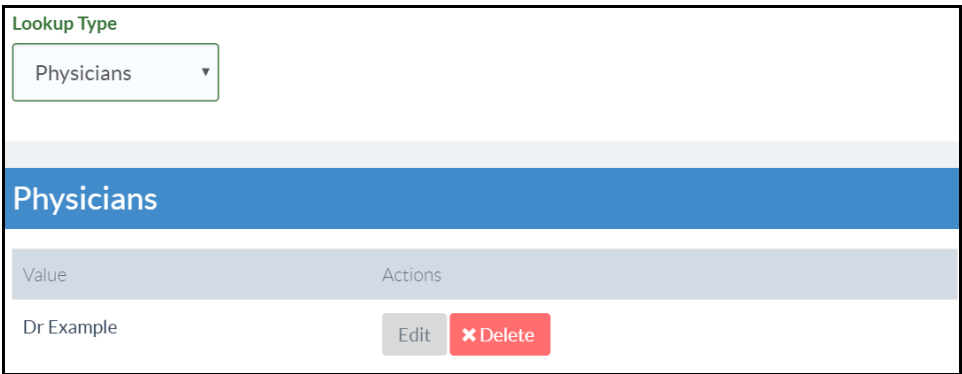


Image 1.1: The Physicians Lookup List Type

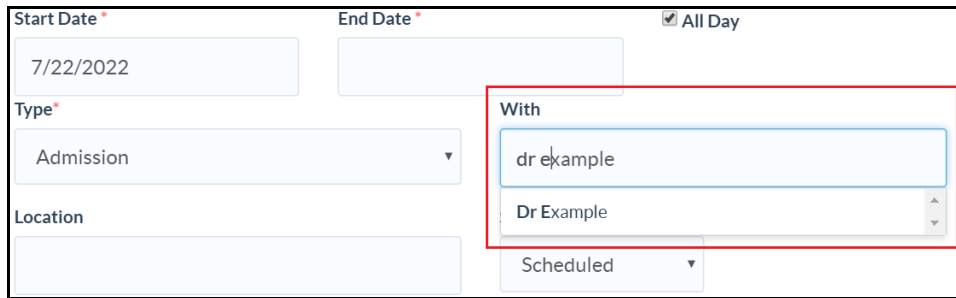
The image shows a web form with several fields. At the top, there are 'Start Date' and 'End Date' fields, with '7/22/2022' entered in the Start Date field. To the right of these is a checkbox labeled 'All Day' which is checked. Below the dates is a 'Type' field with a dropdown arrow. The dropdown menu is open, showing a list of items. The first item is 'dr example', which is highlighted with a blue background. Below it is 'Dr Example'. At the bottom of the dropdown is a 'Scheduled' option with a dropdown arrow. A red rectangular box highlights the entire dropdown menu area.

Image 1.2: A drop-down menu showing a value from the Physicians Lookup List Type

You should add data to the fields and drop-down menus that you know you will use. If you will not use a field or drop-down menu, you do not have to add data to it; it will not affect your experience using HospitalRun.

Each Lookup List type has an option called **User Can Add New Values**. By selecting this option, you can let any User type a new choice into the field or drop-down menu. By turning this option off, users can only select a predefined choice from the data you enter in the Lookup List.

Note: Not all fields are populated by data from Lookup Lists. You must add data to some fields in the main menu that uses the field. See “Adding data in menus instead of Lookup Lists” on page 8.

Limitations of Lookup Lists

You can add only standalone data to Lookup Lists. For example, if your hospital uses CPT codes¹, you cannot associate a CPT code with a procedure.

Importing and manually adding data to Lookup Lists

You can add data to Lookup Lists by importing a file or manually adding each item. Creating a typed list of the data you need to add to a Lookup List makes the process quicker if you have multiple items to add. See “Tips for formatting a file for a successful import” on page 7.

You can import the following file types:

- Windows Word (doc or docx)
- Windows Excel (xlsx)
- Plain text (txt)

1. Current Procedural Terminology (CPT) codes are used mostly in the U.S.A. to codify medical services and procedures.

To import a file

1. Click **Administration**.
The Administration menu expands.
2. Click **Lookup Lists**.
The Lookup Lists window opens.
3. Select the field type from the **Lookup Type** drop-down menu.
4. In the Import File section, click **Choose File**.
Your system's file explorer dialog box opens.
5. Choose the file you want to import and click **Open**.
6. In the Import File section, click **Import**.
The List Imported dialog box opens.
7. Click **Ok**.
Your data is listed in the Lookup Type window.

To manually add an item

1. Click **Administration**.
The Administration menu expands.
2. Click **Lookup Lists**.
The Lookup Lists window opens.
3. Select the field type from the **Lookup Type** drop-down menu.
4. Click **Add Value**.
The Add Value dialog box opens.
5. Type the item name into the **Value** field and click **Add**.
The List Saved dialog box opens.
6. Click **Ok**.

Tips for formatting a file for a successful import

If you choose to import the data you need in your Lookup Lists, you must format the file before importing it. Follow these tips to successfully import a file:

- Use a new line for each item.
- The items must be in the first column of a table or spreadsheet. HospitalRun cannot import anything from any other columns.
- Double check that you have selected the correct file. If you choose the wrong file, you must manually delete each item.

Adding data in menus instead of Lookup Lists

For fields that other Users can add to or edit, you do not add data in Lookup Lists. You add data to these fields in the main menu that holds the field. For example, the Pharmacist User Role can add new inventory items, so you add data in the Inventory menu. Table 1.1 lists the fields and drop-down menus that Users can populate, the location in the main menu, and which User Roles can add data.

Field or drop-down menu name	Location in main menu	User Roles that can edit by default
Inventory Item	Inventory	Data Entry, Hospital Administrator, Inventory Manager, Nurse Manager, Medical Records Officer, Pharmacist
Payment Profile	Billing	Data Entry, Finance, Hospital Administrator, Medical Records Officer
Medication	Inventory	Data Entry, Doctor, Hospital Administrator, Medical Records Officer, Pharmacist
Incident Category	Incident	User Administrator, System Administrator
Incident Category Item	Incident	User Administrator, System Administrator
Pricing Items	Billing	Data Entry, Hospital Administrator, Finance, Medical Records Officer

Table 1.1: Fields to which Users add data from the main menu

Creating Pricing Items

You use Pricing Items to charge patients for services. A Pricing Item links the name of a service and its fee. Pricing Items are divided into these categories:

- Procedure Pricing
- Imaging Pricing
- Lab Pricing
- Ward Pricing

You add data to Pricing Items in the Billing menu since other User Roles can create and edit Pricing Items.

To add a Pricing Item

- 1. Click **Billing**.
The Billing menu expands.
- 2. Click **Prices**.
The All Pricing window opens.
- 3. Click **+ new item**.
- 4. Type the name of the item in the **Name** field.
- 5. Type the price in the **Price** field.
- 6. (Optional) Type the account in the **Expense To** field.
- 7. Select the pricing item category from the **Category** drop-down menu.
- 8. (Optional) In the Pricing profile overrides section, click **+ Add Override** to apply a pricing profile.
Note: See "Applying overrides with Pricing Profiles" on page 12.
- 9. Click **Add**.
The Pricing Profile Saved dialog box opens.
- 10. Click **Ok**.

Introduction to Pricing Profiles

A Pricing Profile is a set discount type that you can use to apply discounts to invoices. You can set a Pricing Profile for a percentage or a dollar amount. You can also use Pricing Profiles to apply overrides to Pricing Items when the discounted amount is not a set amount or percentage.

See "Scenario 1: Using a Pricing Profile for a percent discount" on page 9 and "Scenario 2: Using a Pricing Profile for overrides" on page 10 for examples of when and how to use Pricing Profiles.

Note: HospitalRun uses the terms *Pricing Profile* and *Payment Profile* interchangeably.

Scenario 1: Using a Pricing Profile for a percent discount

Your hospital offers a 10 percent cash discount for uninsured patients. You need a way to apply the discount to invoices in an accurate and consistent way.

You can do this by creating a Pricing Profile called "Uninsured cash discount," and setting it to a 10 percent discount (see Image 1.3).

Name	Discount Amount	Discount Percentage	Actions
Uninsured cash discount		10	<div>EditDelete</div>

Image 1.3: A Pricing Profile set for a discount percentage

You can now use this Pricing Profile to apply a discount to an invoice. When you create an invoice, select “Uninsured cash discount” as the Payment Profile and it automatically reduces the total invoice by 10 percent.

See “Creating a Pricing Profile” on page 11 and “Applying discounts and alternate pricing with Pricing Profiles” on page 39 for step-by-step instructions.

External Invoice #		Payment Profile	
		Uninsured cash discount	
Line Items + Add Line Item			
Description	Actual Charges	Discount	
Hospital Charges			
+ Room/Ar	1,440	144	
+ Pharmac	54	5.4	
+ X-ray/Lab	908.07	90.81	
Total Hospital Charges	2,402.07	240.21	

Image 1.4: A discount percentage Pricing Profile applied to an invoice

Scenario 2: Using a Pricing Profile for overrides

Your patient belongs to a government-run health insurance program that has its own set fees that are lower than the recommended fees for your area. This government program does not allow hospitals to charge the patient the difference. You need a way to reflect the lower fees on the patient’s invoice, but you cannot use a dollar amount or percent discount since the price difference is on a per-item basis.

You can do this by creating a Pricing Profile called “Government health program.” However, you do not enter a dollar amount or percentage as the discount; you must leave the Discount fields blank.

Then you edit each Pricing Item to apply an override for the new fees. When you edit the Pricing Item, select “Government health program” as the Payment Profile and enter the reduced fee.

Name *

Government health program

Discount Percentage

Discount Amount

Image 1.5: A Pricing Profile that has no discount percentage or amount

Then when you create the patient's invoice, select "Government health program" as the Payment Profile to automatically apply the reduced fees.

See "Applying overrides with Pricing Profiles" on page 12 and "Applying discounts and alternate pricing with Pricing Profiles" on page 39 for step-by-step instructions.

Creating a Pricing Profile

You create and edit Pricing Profiles from the Billing menu since other User Roles also have permissions to create and edit Pricing Profiles. To apply a Pricing Profile to an invoice, see "Applying discounts and alternate pricing with Pricing Profiles" on page 39.

To create a pricing profile

1. Click **Billing**.
The Billing menu expands.
2. Click **Prices**.
The All Pricing Items window opens.
3. Click **Pricing Profiles**.
4. Click **+ new item**.
The New Pricing Profile dialog box opens.
5. Type the Pricing Profile name in the **Name** field.
6. (Optional) Add the discount amount by doing one of the following:
 - a. Type the percentage in the **Discount Percentage** field.
 - b. Type the dollar amount in the **Discount Amount** field.
7. Click **Add**.
The Pricing Profile Saved dialog box opens.
8. Click **Ok**.

Note: Adding a discount percentage or amount is only optional if you need to apply different overrides to different Pricing Items with the same Pricing Profile. You must first create a Pricing Profile and then apply overrides to each Pricing Item. See "Applying overrides with Pricing Profiles" on page 12.

Applying overrides with Pricing Profiles

You apply overrides to individual Pricing Items when the Pricing Profile type is not a set dollar amount or percentage. You must first create a Pricing Profile with no discount by following the steps in “Creating a Pricing Profile” on page 11.

To apply a Pricing Profile override to a Pricing Item

1. Click **Billing**.
The Billing menu expands.
2. Click **Prices**.
The All Pricing Items window opens.
3. Beside the Pricing Item you want to override, click **Edit**.
The Edit Pricing Item window opens.
4. In the Pricing profile overrides section, click **+ Add Override**.
The Add Override dialog box opens.
5. Select the Pricing Profile from the **Pricing Profile** drop-down menu.
6. Type the override price in the **Price** field.
7. Click **Add**.
8. Click **Update** to save the override.
The Pricing Item Saved dialog box opens.
9. Click **Ok**.
The Pricing Profile override is tied to the Pricing Item without affecting the regular set fee (as shown in Image 1.6).

The screenshot shows the 'Edit Pricing Item' window. At the top, the 'Name' field contains 'Office o/p est sf 10-19 min'. Below this, the 'Price' field is set to '57.45' and the 'Expense To' field is empty. The 'Category' is set to 'Procedure' and the 'Type' is set to 'Clinic'. At the bottom, there is a section titled 'Pricing profile overrides' with a '+ Add Override' button. Below this section is a table with the following data:

Pricing Profile	Price	Actions
ODSP	21	Edit Delete

Image 1.6: A Pricing Item with a Pricing profile override applied

