

Process Guideline		1.5. 1	Modifying a l	Bill	ed Tally Sheet	All users  Administrative   Clinic
OpenEMR		4.1	Last update		Sept. 27, 2017	Author(s): X Gonzalez
version	Step	S	Menu	Re	e-opening a Tally	Sheet for modification

# 1 Checking Visit History

When a client is selected her/his Visit History is displayed automatically on the bottom panel. In addition, the active client's Visit History can be displayed by selecting Client > Visits > Visit History.

Importantly, the Visit History shows all visits and their Open (Yes) or Closed (No) status. An open visit allows direct changes in the tally sheet; otherwise, Re-opening may be necessary as shown below.

# opening a Tally Sheet

When a billed Tally Sheet tab is selected, OpenEMR displays the TS associated to the active client and visit with the warning:

The encounter has been billed. To make changes re-open or select Add More items.

On one hand, Adding More Items allows the inclusion of more services or products to the existing bill without voiding the previous invoice.

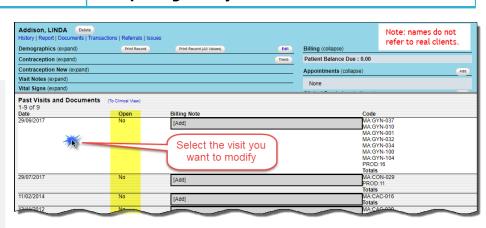
On the other hand, Re-opening the visit voids previous financial transactions, audit trail is recorded, and payments need to be re-entered.

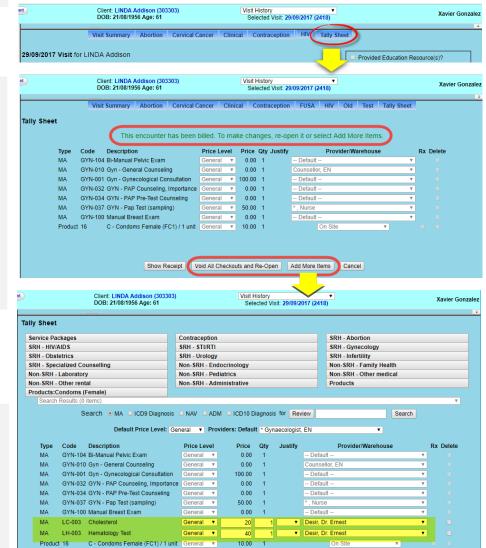
# 3 Adding items to the Tally Sheet

This example shows the pre-invoice generated on Sep. 29, 2017 in PG 1-5-0 Completing an Electronic Tally Sheet. This TS is now being reopen on a different date (Oct 1, 2017). These dates remain associated to individual items.

Two laboratory services have been added: Cholesterol and Haematology tests, performed by a different provider.

These data can be recorded without processing a new Checkout by pressing Save, or by pressing Save and Checkout as





Save Save and Checkout Refresh Cancel



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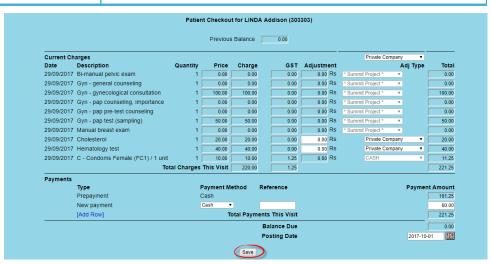
# 4 Completing a new Checkout

Note that the new Checkout allows Adjustment amount and type for the newly added services only.

When these data is Saved, a detailed bill is displayed, which can be also presented in summarized form as shown below.

Note that old and new charges are presented separately and associated to the corresponding date.

If needed, the whole checkout data can be voided and a new invoice issued





# 5 Voiding Checkout & Reopen

Voiding checkout to produce a new invoice requires documenting void Reason and Notes.





Purpose	To describe the process of modifying a Tally Sheet that has been already billed
Process description	Upon completing Checkout a Tally Sheet (TS) is billed and the corresponding visit is closed. However, sometimes modifications are needed, either the same day or on a later date. This PG illustrates how these modifications can be done.
Pre- conditions	Given the appropriate authorization to modify or void an invoice, services and/or products can be added or removed from a Tally Sheet that has been billed. OpenEMR keeps track of all transaction dates, void reasons and explanations for auditing purposes.
Observatio ns	Modifying a TS requires supervision and compliance with fiscal regulations.