

# Process Guideline

1.4.0

## Printing a Paper Tally Sheet

## Receptionist

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OpenEMR version

4.1

Last update

Sept. 3, 2017

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Steps

Menu

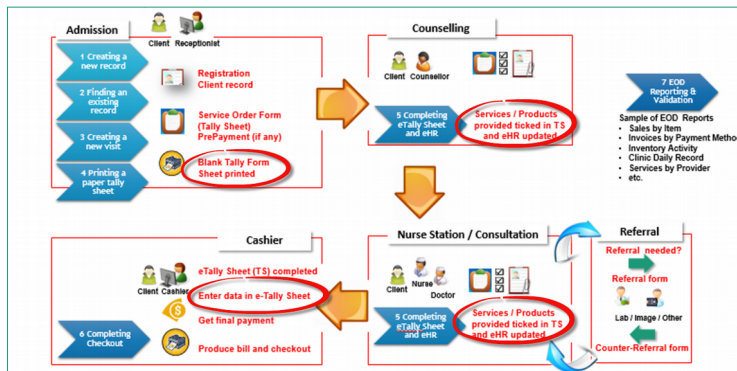
Tally Sheet role | Verification | Print out

### 1 Tally Sheet Role

The Tally Sheet(TS), both in its printed and digital form, plays a central role in OpenEMR visit cycle as shown in the diagram.

In particular, the printed form that is created at the beginning of the client visit, is where clinic staff record services and products provided when the clinic does not have the system operating at every workstation or consulting room.

At the end of the visit, during checkout, the cashier enters all checks in the digital eTally Sheet.



### 2 Verifying Services

Services contained in the Tally Sheet are defined and mapped during implementation, and can be added or edited by system administrators. System users and OLE staff, however, must verify and validate periodically these services and their mapping to IPPF Service Statistics or other Projects list, to ensure proper statistical reporting.

The Reports > Visits > Services report is a useful tool to verify contents and mapping of services. In this example, a recently added MA service (GYN Breast Cancer Counselling) is correctly mapped to IPPF code 2141010900102 Gynaecology - Counselling - General - Breast cancer.

Category	Type	Code	Mod	Act	IC	Description	Short Description	Sex	Related ACCT	Related DEPT	Related FUND	Related IPPF	Related IPPF2
SRH - Gynecology	MA	GYN-010		Yes	No	Gyn - General Counseling		Women Only					aspiration
	MA	GYN-012		Yes	No	Gyn - LEEP Counseling		Women Only					2141010900999 Gynecology - Counselling - General - other
	MA	GYN-016		Yes	No	GYN Breast Cancer Counseling		All					2141010900102 Gynecology - Counselling - General - Breast cancer
	MA	GYN-030		Yes	No	GYN - VIA Pre-Test Counseling	VIA Pre-Test Counseling	Women Only					2141010111101 Gynecology - Counselling -

### 3 Paper Tally Sheet

Once all relevant services are correctly defined and mapped, a complete Tally Sheet with checkboxes can be printed in paper. Importantly, this Tally Sheet blank form is automatically updated when services are added or modified by a system administrator, as shown in next page.



### Tally Sheet

First Clinic I  
Sheet 1  
City 1, State 1  
Country 1  
444-999-222

Service Packages	Contraception	SRH - HIV/AIDS	SRH - STI/RTI	SRH - Gynecology	SRH - Obstetrics	SRH - Urology	SRH - Infertility	SRH - Specialized Counselling
<p>Female Special</p> <p>Male Special</p> <p>Special Services (MR)</p> <p>Mother's Day</p> <p>GCAC Package</p> <p>FPAT Male Test</p>	<p>CON-029 Depo (3 months) - Follow up - Resupply</p> <p>CON-028 Depo (3 months) - Initial consultation</p> <p>CON-084 EC - Yuzpe Method</p> <p>CON-092 Emergency Contraception - Dedicated Product</p> <p>CON-090 Emergency Contraception - Counseling</p> <p>CON-100 IUD - Standard Days Method - Initial Consultation/Training</p> <p>CON-102 IUD - Standard Days Method - Follow up/Training</p> <p>CON-091 FP General Counseling</p> <p>CON-044 Implant - Removal</p> <p>CON-042 Implant (2 Rods) - Follow Up/Reinsertion</p> <p>CON-040 Implant (2 Rods) - Initial Consult</p> <p>CON-022 Injectable 1 month - Follow up consultation</p> <p>CON-020 Injectable 1 month - Initial Consultation</p> <p>CON-028 Injectable (2 months) - Follow up/Re-supply</p> <p>CON-024 Injectable (2 months) - Initial Consultation</p> <p>CON-072 IUD (5 years) - Follow Up</p> <p>CON-070 IUD (5 years) - Insertion/Initial Consult</p> <p>CON-077 IUD Copper T - Reinsertion</p> <p>CON-074 IUD Copper T Insertion</p> <p>JG-007 James Bond</p> <p>CON-090 Male Condom - Initial Consultation</p> <p>CON-105 Male VSC Follow up</p> <p>CON-104 Male VSC Management</p> <p>CON-108 Male VSC NSV</p> <p>CON-110 Ovary - Follow up</p>	<p>CAC-016 Abortion / Pre Abortion Counseling - OTHER</p> <p>CAC-020 Abortion / Pre Abortion Counseling Harm Reduction Initial Consultation</p> <p>CAC-015 Abortion / Pre Abortion Counseling - Counseling on HIV Testing</p> <p>CAC-048 Abortion / Pre Abortion Counseling - Pregnancy options Counseling - Including Family Planning</p> <p>CAC-021 Abortion Counseling Harm Reduction Follow-up Consultation</p> <p>CAC-047 Abortion Counseling - Post Abortion Counseling - Including Family Planning</p> <p>CAC-018 Abortion Counseling - Post Abortion Counseling and family planning counselling</p> <p>CAC-026 Abortion Diagnosis - Cervical cytology (Pap test or visual acid test)</p> <p>CAC-033 Abortion Diagnosis - Exclusion of Anemia (Hemoglobin and/or Hematocrit tests)</p> <p>CAC-034 Abortion Diagnosis - Exclusion of ectopic pregnancy (through ultrasound)</p> <p>CAC-036 Abortion Diagnosis - HIV testing</p> <p>CAC-037 Abortion Diagnosis - OTHER</p> <p>CAC-040 Abortion Diagnosis - Tests for ABO and Rhesus (Rn) blood groups typing</p> <p>CAC-039 Abortion Induced (Medical) - Drug induced (combination of misoprostol and mifepristone)</p> <p>CAC-023 Abortion Induced (Medical) - Drug induced (Misoprostol Only)</p> <p>CAC-026 Abortion Induced (Medical) - OTHER</p> <p>CAC-028 Abortion Induced (Surgical) - Dilatation And Curettage (D&amp;C)</p> <p>CAC-038 Abortion Induced (Surgical) - Dilatation And Evacuation (D&amp;E) (2nd trimester of pregnancy)</p> <p>CAC-010 Abortion Induced (Surgical) - OTHER</p> <p>CAC-040 Abortion Induced (Surgical) - Vacuum Aspiration (Manual or Electrical)</p> <p>CAC-022 Abortion Services - OTHER</p>	<p>HA-050 HIV Antibody Test</p> <p>RA-0011 This is a test service created by rajay</p> <p>253102 Chlamydia Antibody Test</p> <p>254101 Culture Swab</p> <p>258002 HSV</p> <p>254102 Syphilis Test</p>	<p>GYN-058 GYN - Surgery Breast Cancer</p> <p>GYN-040 GYN - VIA Post Screening Counseling</p> <p>GYN-030 GYN - VIA Pre-Test Counseling</p> <p>GYN-035 GYN - VIA Screening</p> <p>GYN-018 GYN Breast Cancer Counseling</p> <p>111111 Hospital service No 1</p> <p>GYN-084 Hysterocel/Program</p> <p>GYN-122 Loop Cone Biopsy</p> <p>GYN-060 Mammography</p> <p>GYN-100 Manual Breast Exam</p> <p>GYN-086 Polypectomy</p> <p>GYN-124 Punch Cone Biopsy</p> <p>GYN-088 Skindrug Suture (GA)</p> <p>GYN-074 TCA</p> <p>GYN-126 Vulval Biopsy</p>	<p>252101 Group B Rheus Factor</p> <p>08-060 OB Prenatal VDRL</p> <p>08-010 Pregnancy Test</p> <p>Progestational Level</p> <p>258104 Progesterone Level (BRL)</p>	<p>257004 Bilateral Varicocele (GA)</p> <p>257001 Hydrocelectomy</p> <p>257002 Prostatic Biopsy</p> <p>UR-020 PSA</p> <p>257005 Unilateral Varicocele (GA)</p> <p>UR-001 UR - Prostate Check</p>	<p>258001 Endometrial Biopsy</p> <p>258003 HPV/DNA Swab</p>	<p>258003 HPV/DNA Swab</p>

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1.4.0

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All users | Administrative | Clinic

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Last update

Sept 23, 2017

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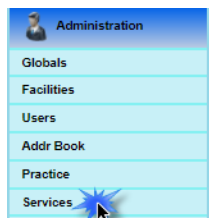
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## Steps

## Description

## Technical Note on Service definition and mapping

### 4 Registering services



Note: This technical procedure is not intended to be applied by regular users but only by trained system administrators.

Services are registered according to local MA needs and language, and are mapped to IPPF and other relevant criteria to facilitate statistical reporting.

**Type:** Services are defined based on MA price list

**Code:** A prefix (GYN, OBS, etc.) is recommended before a sequential number

**Description:** Using MA language for easier identification by local staff

**Category:** Important grouping criterion to facilitate service organization in Tally Sheet

**Relate to:** Mapping criteria to IPPF2 (new) Service Statistics List as a minimum (see below)

### 5 Mapping services

By selecting the 'Relate to' field, OpenEMR displays a list of codes according to Type (IPPF2 in the example) and a Search for filter (breast in the example).

Selecting the appropriate IPPF service, its code is reflected in the 'Relate to' field, so the service becomes mapped accordingly.

## Purpose

To describe the process of defining and printing a paper Tally Sheet

## Process description

The Tally Sheet (TS) plays a central role in the visit cycle (see PG 1-0-0 Summary of Visit Cycle Process): 1) A TS is printed to follow each step in the cycle; 2) Services/Products provided are ticked during Counselling, Pre-consultation and each Medical Consultation; 3) Data in paper TS is entered in the e-Tally Sheet at Checkout.

## Pre-conditions

During the implementation process, the Association's service and product catalogues will be defined and mapped to IPPF Service Statistics official list. This allows reporting statistics according to MA, IPPF and special projects criteria (see PGs 9-7-1, 9-7-2 & 9-7-3).

## Observations

Given the importance of clarifying how Services are defined, mapped and corrected if necessary, this PG includes a brief technical note on how system administrators can configure services during implementation, or as part of a maintenance process.