

Process Guideline	1.6. 0	Completing Ch Visit Cycle	neckout - Closing the All users Admin Clinic
OpenEMR	4.1	Last update	Sept. 26, 2017 Author(s): X Gonzalez
version	Steps	Menu 7	Fally Sheet pre-invoice Checkout

1 Tally Sheet Preinvoice

The Tally Sheet (TS) includes a detailed description of services and products provided, which represent a preliminary invoice.

All service providers (e.g. Counsellor, Nurse, Medical specialist, etc.) Save their data adding items to the pre-invoice, until the cashier or other designated official selects Save and Checkout, which produces a checkout document as shown below.

Completing Checkout

Client or patient checkout data include balance due from previous visits, as well as details on services and non-editable fields for Quantity, Price, Charge and General Sales Tax (GST). changes to these fields can only be done in the TS; otherwise, an adjustment amount can be entered for each item as required.

Type of Adjustment by item is mandatory, and can make reference to a specific Project, Insurer, Discount reason, etc., and can be simplified by entering a default value that is applied to all items.

Payment method and Reference (e.g. check or credit card number) complete checkout data.

MA GYN-104 Bi-Manual Pelvic Exam General ▼ 0 1 ▼ Default	SRH - Urology Non-SRH - Endocrinology Non-SRH - Endocrinology Non-SRH - Pediatrics Non-SRH - Administrative MA ICD9 Diagnosis NAV ADM ICD10 Diagnosis for Review Default Price Level: General Providers: Default General Providers: Default	SRH - HIV/AIDS	S		Contrace						SRH - Abortion			
Non-SRH - Endocrinology Non-SRH - Dedictriology Non-SRH - Dedictrics Non-SRH - Other medical Products: Condoms (Female) Search Results (0 Items) Search MA ICD9 Diagnosis NAV ADM ICD10 Diagnosis Fevriew Search Default Price Level: General Providers: Default Gynaecologist, EN Type Code Description Price Level Price Other O	Non-SRH - Endocrinology Non-SRH - Pediatrics Non-SRH - Administrative MA ICD9 Diagnosis NAV ADM ICD10 Diagnosis for Review Default Price Level: General Providers: Default General Providers: Default General Providers: Default Price Level: General Providers: Default General G										-			
Non-SRH - Laboratory Non-SRH - Other rental Non-SRH - Administrative Non-SRH - Other rendical Products: Search Results (0 Items) Search Results (0 Items) Search OMA	Non-SRH - Pediatrics Non-SRH - Administrative Non-SRH - Administrative MA					07								
Non-SRH - Other rental Non-SRH - Administrative Products Search Results (0 Items)	Non-SRH - Administrative Products MA	· · · · · · · · · · · · · · · · · · ·		ing										
Products:Condoms (Female) Search Results (0 Items) Search OMA OICD9 Diagnosis ONAV OADM OICD10 Diagnosis for Review Search Default Price Level: General **Providers: Default **Gynaecologist, EN ** Type Code Description Price Level Price Oty Justify Provider/Warehouse RX MA GYN-010 Bil-Manual Pelvic Exam General **O 1 **V** Default **V** MA GYN-010 Gyn - General Counseling General **O 1 **V** Default **V** Counsellor, EN **V**	MA OICD9 Diagnosis ONAV OADM OICD10 Diagnosis for Review Search Default Price Level: General Providers: Default General Providers: Default General Providers: Default Price Level: General Providers: Default General Genera											er medical		
Search Results (0 Items) Search • MA	Default Price Level: General Providers: Default Gynaecologist, EN			a)	Non-SRH	- Adn	inistrative				Products			
Search • MA ICD9 Diagnosis • NAV • ADM ICD10 Diagnosis for Review Search Default Price Level: General • Providers: Default * Gynaecologist, EN Type Code Description Price Level Price Qty Justify Provider/Warehouse Rx MA GYN-104 Bi-Manual Pelvic Exam General • 0 1 • Default - • • MA GYN-010 Gyn - General Counseling General • 0 1 • Counsellor, EN	Default Price Level: General Providers: Default Gynaecologist, EN			e)										
Default Price Level: General Providers: Default General Genera	Default Price Level: General Providers: Default Gynaecologist, EN								. —					
Type Code Description Price Level Price Qty Justify Provider/Warehouse Rx MA GYN-104 BI-Manual Pelvic Exam General ▼ 0 1 ▼ Default ▼ MA GYN-010 Gyn - General Counseling General ▼ 0 1 ▼ Counsellor, EN ▼			S	earch MA ICD9 Diagnosi	s ONAV) ADN	1 O ICD10 E	Diagnosi	s for Rev	riew		Search		
Type Code Description Price Level Price Qty Justify Provider/Warehouse Rx MA GYN-104 BI-Manual Pelvic Exam General ▼ 0 1 ▼ Default ▼ MA GYN-010 Gyn - General Counseling General ▼ 0 1 ▼ Counsellor, EN ▼				Default Drice Level:	Conoral =	Drov	idore: Dofau	It & Ove	no colonist	EN				
MA GYN-104 Bi-Manual Pelvic Exam General ▼ 0 1 ▼ Default ▼ MA GYN-010 Gyn - General Counseling General ▼ 0 1 ▼ Counsellor, EN ▼	Delegational Delegation Characteristics Development Description			Delault File Level.	General *	FIOV	ideis. Deiau	it Gyr	iaecologist	EIN				
MA GYN-010 Gyn - General Counseling General ▼ 0 1 ▼ Counsellor, EN ▼	on Price Level Price Qty Justify Provider/Warehouse Rx Delete	Туре	Code	Description	Price Le	evel	Price	Qty	Justify	1	Provider/Warehou	ise	Rx D	elete
	Pelvic Exam General ▼ 0 1 ▼ Default ▼ □	MA	GYN-104	Bi-Manual Pelvic Exam	General	•	0	1		Default		•		
MA GYN-001 Gyn - Gynecological Consultation General ▼ 100 1 ▼ - Default - ▼	eral Counseling General ▼ 0 1 ▼ Counsellor, EN ▼	MA	GYN-010	Gyn - General Counseling	General	•	0	1	_	Counsellor, E	N	•		
	ecological Consultation General V 100 1 V Default V	MA	GYN-001	Gyn - Gynecological Consultation	n General	•	100	1		Default		•		
MA GYN-032 GYN - PAP Counseling, Importance General ▼ 0 1 ▼ Default ▼		MA	GYN-032	GYN - PAP Counseling, Importar	nce General	•	0	1	_	Default		,		
MA GYN-034 GYN-PAP Pre-Test Counseling General ▼ 0 1 ▼ Default ▼			GYN-034	GYN - PAP Pre-Test Counseling	General		0	1		Default		,		
	Counseling, Importance General V 0 1 V Default V	MA			General		_	1						
	Pre-Test Counseling General ▼ 0 1 ▼ Default ▼ Pre-Test Counseling General ▼ 0 1 ▼ Default ▼		GYN-037	GYN - Pap Test (sampling)			- 00							
The first terminal broad blank	P Courseling, Importance General ▼ 0 1 ▼ Default	MA		· · · · · · · · ·		•	0							
Product 16 C - Condoms Female (FC1) / 1 unit General ▼ 10 1	P Courseling, Importance General ▼ 0 1 ▼ Default ▼ P Pre-Test Counseling General ▼ 0 1 ▼ Default ▼ LTest (sampling) General ▼ 50 1 ▼ *, Nurse ▼ Beast Exam General ▼ 0 1 ▼ Default ▼	MA MA	GYN-100	Manual Breast Exam	General			<u> </u>				_		
MA GYN-032 GYN - PAP Counseling Importance General V 0 1 V Default V		MA	GYN-032	GYN - PAP Counseling Importar	nce General	•	0	1		Default		,		
							_	_						
	Counseling, Importance General V 0 1 V Default V	***	GYN-034				_							
MA GYN-037 GYN - Pap Test (sampling) General ▼ 50 1 ▼ <mark>*, Nurse ▼</mark>	Pre-Test Counseling General ▼ 0 1 ▼ Default ▼ □				General		50	1		*, Nurse		•		
MA GYN-100 Manual Breast Exam General ▼ 0 1 ▼ Default ▼	Pre-Test Counseling General ▼ 0 1 ▼ Default ▼ □		GYN-037	GYN - Pap Test (sampling)	Contorui					Default				
	P Courseling, Importance General ▼ 0 1 ▼ - Default ▼ P Pre-Test Counseling General ▼ 0 1 ▼ - Default ▼ I Test (sampling) General ▼ 50 1 ▼ Nurse ▼	MA		· · · · · · · · ·		٧	0	1	-					

			Previous Ba		0.00			: name efer to ts.	
Current Ch							Summit Project		
Date	Description	Quantity	Price	Charge	GST	Adjustment		Adj Type	Total
29/09/2017	Bi-manual pelvic exam	1	0.00	0.00	0.00	0.00 Rs	Summit Project	•	0.00
29/09/2017	Gyn - general counseling	1	0.00	0.00	0.00	0.00 Rs	Summit Project	•	0.00
29/09/2017	Gyn - gynecological consultation	1	100.00	100.00	0.00	0.00 Rs	Summit Project	•	100.00
29/09/2017	Gyn - pap counseling, importance	1	0.00	0.00	0.00	0.00 Rs	Summit Project	•	0.00
29/09/2017	Gyn - pap pre-test counseling	1	0.00	0.00	0.00	0.00 Rs	Summit Project	•	0.00
29/09/2017	Gyn - pap test (sampling)	1	50.00	50.00	0.00	0.00 Rs	Summit Project	•	50.00
29/09/2017	Manual breast exam	1	0.00	0.00	0.00	0.00 Rs	Summit Project	•	0.00
29/09/2017	C - Condoms Female (FC1) / 1 unit	1	10.00	10.00	1.25	0.00 Rs	CASH	•	11.25
	Tota	l Charges	This Visit	160.00	1.25				161.25
Payments									
	Туре		Payment M		Reference			Paymer	nt Amount
	New payment		Cash ▼						161.25
	[Add Row]		To	tal Payme	ents This Visit				161.25
					Balance Due				0.00
			Te	entative li	Posting Date nvoice Ref No			2017-09-	000715

Checkout data elements include:

- Previous Balance: Amount due form services/products received in previous visits
- Date: DD/MM/YYYY associated with a specific visit
- Description: Name of service / product as recorded in the organization's (MA) list
- · Quantity: Number of services or products provided as recorded in the Tally Sheet. Changes must be done in TS.
- Price/Price: Money amount as recorded in the Tally Sheet. Changes must be done in TS.
- Charge: Amount due (Quantity x Price) before taxes
- GST: General Sales Tax or other Tax type as defined during implementation or system maintenance
- Adjustment: Money amount to increase or decrease amount due by item according to Adjustment Type
- Adjustment Type: Donation, Discount, Project, Donor, Cash, Other as configured during implementation
- Payment method: Cash, Check, Credit Card, Debit Card, Other as configured during implementation
 Reference: Open alphanumeric field to enter Check number, Card number, etc.



Process Guideline	1.6. 0	Completing C Visit Cycle	he	ckout - Closing the	All users Admin Clinic Page 2 of
OpenEMR	4.1	Last update		Sept 26, 2017	Author(s): X Gonzalez 2
version Steps	De	scription	A	dding services and	products to the Tally Sheet

3 Printing Receipt / Invoice

Upon Saving Checkout data the Client Receipt for Invoice is displayed onscreen.

Note that in this example, the receipt number (000718) corresponds to the first Sales receipt below.

However, if a New Receipt Number is required, it can be generated.

Sales receipts show priced items only.

In addition, if a summarized receipt is required, selecting Hide Details produces an invoice with a single total.

Sales Receipt

Summary receipt (hiding details) and Sales receipts showing priced items only. Different receipt numbers can be generated as shown.

5 Voiding Last/All Checkout(s)

FAMILY PLANNING AS	SSOCIATION		First C Stre City 1, 444-9							
			Client Receipt fo	or Invoice	e 000718					
LINDA Addison Mermaid Rd									Beginning Account Balance Total Visit Charges Adjustments Payments Ending Account Balance	0.00 161.25 0.00 161.25 0.00
Charges for 29/ Date	/09/2017 Code	Description		Qty	Price	Charge	GST	Adi	Туре	Total
29/09/2017	16	C - Condoms Female (FC1) / 1 unit		1	10.00	10.00	1.25	Auj	CASH	11.25
29/09/2017	GYN-104	Bi-Manual Pelvic Exam	•	1	10.00	10.00	1.23		Summit Project	0.00
29/09/2017	GYN-010	Gyn - General Counseling		1					Summit Project	0.00
29/09/2017	GYN-001	Gyn - Gynecological Consultation		1	100.00	100.00			Summit Project	100.00
29/09/2017	GYN-001	GYN - PAP Counseling, Importance		1	100.00	100.00			Summit Project	0.00
29/09/2017	GYN-032	GYN - PAP Pre-Test Counseling		1					Summit Project	0.00
29/09/2017	GYN-037	GYN - Pap Test (sampling)		4	50.00	50.00			Summit Project	50.00
29/09/2017	GYN-100	Manual Breast Exam		4	30.00	30.00			Summit Project	0.00
23/03/2017	0114-100	Walldar Di Gast Exam	Sub-Total	I 8	160.00	160.00	1.25	0.00	Guillille i Toject	161.25
Payments Date		Receipt Ref			it Method	R	lef No		Total Charges	161.25 Amount
Date 29/09/2017	000718-1	***********		Paymen Cash	it Method	R	ef No			
Date 29/09/2017 YEARS HELPING Interest on September Of Generate N	3 VULNERABL er 30, 2017 lew Receipt Nu	E POPULATION	All Checkouts Hide		it Method		First Clinic Street 1 City 1, State 444-999-222 ceipt for Invo			Amount 161.25
Date 29/09/2017 YEARS HELPING YEARS HELPING Generate N Generate N Laboratory - Osimas Seet 1, Girl First Circl Addison 303030 303030 Amme	000718-1 3 VULNERABL er 30, 2017 lew Receipt Nu ceipt # 000718-7 Citate 22	LE POPULATION 2000/2017 19-33 Laboratory - Delmar Clinic Francisco Street I. Op 1 Pro-Pront-4-4-979-22 Dal To-Linch Addison 203803 Zasher: agenzalaz Lem Name Ext.Price	FØA	Cash	it Method		First Clinic I Street 1 City 1, State 444-999-222		Beginner Action of Total Payments Beginner Action with Charles and Total with Charles Action of Total with Charles Action of Total with Charles Action of Total Payments and Total Paym	Amount 161.25 Rs 161.25
Date 29/09/2017 YEARS HELPING THE CONTROL OF THE	000718-1 3 VULNERABL er 30, 2017 lew Receipt Nu ceipt 9 900718-7 Cities Ext Price 10.00 10.00	2000/2017 19-53	LINDA Addison Mermaid Rd	Cash		Client Re	First Clinic I Street 1 City 1, State 444-999-222 ceipt for Invo		Total Payments Bappings And Total Ved Chi. Adjustments Ending Account	Amount 161.25 Rs 161.25
Date 29/09/2017 YEARS HELPING Ited on September Generate N Laboratory - Delmas Carlo September 1 Cap 1 Phone: 444-999-22 LURO Addison 303303 andeans Pentale (PC1)/1 u resolutation amendation for the part of the part o	000718-1 3 VULNERABLE er 30, 2017 lew Receipt Nu ceipt # 000718-4 Cities Ext Price 10.00 10.00 50.00	LE POPULATION 2000/2017 19-53 Sake Recept # 007214 Laboratory - Delmas Clinic Finet Clinic Finet Clinic	FORMY FLAMMON AND ADDRESS OF THE PROPERTY OF T	Cash Details		Client Re	First Clinic Street 1 City 1, State 444-999-222 ceipt for Invo		Beginner Action of Total Payments Beginner Action with Charles and Total with Charles Action of Total with Charles Action of Total with Charles Action of Total Payments and Total Paym	Amount 161.25 Rs 161.25
Date 29/09/2017 YEARS HELPING THE CONTROL OF THE	000718-1 3 VULNERABL er 30, 2017 lew Receipt Nu ceipt 9 900718-7 Cities Ext Price 10.00 10.00	2000/2017 19-53	FORM FLAMENT AND ADDRESS OF THE PROPERTY OF T	Cash Details	ot Red	Client Re Pays	First Clinic Street 1 City 1, State 444-999-222 ceipt for Invo		Total Payments Bappings And Total Ved Chi. Adjustments Ending Account	Amount 161.25 Rs 161.25

With due precaution and authorization, a Checkout or series of checkouts can be voided, and the corresponding financial Reversed. A Void Reason and explanatory notes are required to complete this process.

↑ Void Dialog - Geogle Chrome

① emzippf.org/emr/4f X/mierface/patient_file/void_dialog.php

Void Reasoni; Service - Quantity Modifiee

Void Notes: Number of condoms provided is 4

Purpose To describe the process of completing the visit cycle at checkout While the electronic Tally Sheet presents a preliminary invoice based on all Process description services and products provided, where charges can be verified, the Checkout process presents a complete balance with references to Taxes, Adjustment amounts and type, payment method and balance due, if any. When checkout information is Saved, an invoice/receipt is issued and both the Tally Sheet and Visit are closed. A pre-invoice in the Tally Sheet is verified; and adjustment amounts, type, and Preconditions payment method are specified in the final invoice. Observatio Organizations provide services with no associated price such as counselling, as well as services that may be sensitive such as contraception provided to ns adolescents. In the first case, OpenEMR can produce a receipt with priced items only; and, in the second, can issue a receipt with a global amount only and no details.