

Process Guideline	1.5.1	Modifying a Billed Tally Sheet		All users Administrative Clinic
OpenEMR version	4.1	Last update	Sept. 27, 2017	Author(s): X Gonzalez
Steps		Menu	Re-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.

2 Re-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 shown in the next page.

Addison, LINDA Delete
[History](#) | [Report](#) | [Documents](#) | [Transactions](#) | [Referrals](#) | [Issues](#)

Demographics (expand) Print Record Print Record (All Values) Edit Trend Billing (collapse) Patient Balance Due : 0.00

Contraception (expand) Contraception New (expand) Visit Notes (expand) Vital Signs (expand) Appointments (collapse) Add

Past Visits and Documents (To Clinical View)

Date	Open	Billing Note	Code
29/09/2017	No	[Add]	MA-GYN-037 MA-GYN-010 MA-GYN-001 MA-GYN-032 MA-GYN-034 MA-GYN-100 MA-GYN-104 PROD-16 Totals MA-CON-029 PROD-11 Totals MA-CAC-016 Totals MA-CAC-036
29/07/2017	No	[Add]	
11/02/2014	No	[Add]	
13/04/2012	No		

Client: LINDA Addison (303303) Visit History Selected Visit: 29/09/2017 (2418) Xavier Gonzalez

Visit Summary **Abortion** **Cervical Cancer** **Clinical** **Contraception** **HIV** **Tally Sheet**

29/09/2017 Visit for LINDA Addison Provided Education Resource(s)?

Client: LINDA Addison (303303) Visit History Selected Visit: 29/09/2017 (2418) Xavier Gonzalez

Visit Summary **Abortion** **Cervical Cancer** **Clinical** **Contraception** **FUSA** **HIV** **Old** **Test** **Tally Sheet**

Tally Sheet

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

Type	Code	Description	Price Level	Price	Qty	Justify	Provider/Warehouse	Rx	Delete
MA	GYN-104	Bi-Manual Pelvic Exam	General	0.00	1		-- Default --		
MA	GYN-010	Gyn - General Counseling	General	0.00	1		Counselor, EN		
MA	GYN-001	Gyn - Gynecological Consultation	General	100.00	1		-- Default --		
MA	GYN-032	GYN - PAP Counseling, Importance	General	0.00	1		-- Default --		
MA	GYN-034	GYN - PAP Pre-Test Counseling	General	0.00	1		-- Default --		
MA	GYN-037	GYN - Pap Test (sampling)	General	50.00	1		* Nurse		
MA	GYN-100	Manual Breast Exam	General	0.00	1		-- Default --		
Product 16	C	Condoms Female (FC1) / 1 unit	General	10.00	1		On Site		

Show Receipt Void All Checkouts and Re-Open Add More Items Cancel

Client: LINDA Addison (303303) Visit History Selected Visit: 29/09/2017 (2418) Xavier Gonzalez

Visit Summary **Abortion** **Cervical Cancer** **Clinical** **Contraception** **FUSA** **HIV** **Old** **Test** **Tally Sheet**

Tally Sheet

Service Packages
 SRH - HIV/AIDS
 SRH - Obstetrics
 SRH - Specialized Counselling
 Non-SRH - Laboratory
 Non-SRH - Other rental
 Products:Condoms (Female)

Contraception
 SRH - ST/RTI
 SRH - Urology
 Non-SRH - Endocrinology
 Non-SRH - Pediatrics
 Non-SRH - Administrative

SRH - Abortion
 SRH - Gynecology
 SRH - Infertility
 Non-SRH - Family Health
 Non-SRH - Other medical
 Products

Search Results (0 items)

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	Delete
MA	GYN-104	Bi-Manual Pelvic Exam	General	0.00	1		-- Default --		
MA	GYN-010	Gyn - General Counseling	General	0.00	1		Counselor, EN		
MA	GYN-001	Gyn - Gynecological Consultation	General	100.00	1		-- Default --		
MA	GYN-032	GYN - PAP Counseling, Importance	General	0.00	1		-- Default --		
MA	GYN-034	GYN - PAP Pre-Test Counseling	General	0.00	1		-- Default --		
MA	GYN-037	GYN - Pap Test (sampling)	General	50.00	1		* Nurse		
MA	GYN-100	Manual Breast Exam	General	0.00	1		-- Default --		
MA	LC-003	Cholesterol	General	20	1		Desir, Dr. Ernest		
MA	LH-003	Hematology Test	General	40	1		Desir, Dr. Ernest		
Product 16	C	Condoms Female (FC1) / 1 unit	General	10.00	1		On Site		

Save Save and Checkout Refresh Cancel

Process Guideline

1.5.1

Modifying a Billed Tally Sheet

All users | Administrative | Clinic

Page 2 of 2

OpenEMR version

4.1

Last update

Sept 25, 2017

Author(s): X Gonzalez

2

Steps

Description

Completing Checkout

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 & Re-open

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

Patient Checkout for LINDA Addison (303303)

Previous Balance 0.00

Date	Description	Quantity	Price	Charge	GST	Adjustment	Private Company	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	Cholesterol	1	20.00	20.00	0.00	0.00 Rs	Private Company		20.00
29/09/2017	Hematology test	1	40.00	40.00	0.00	0.00 Rs	Private Company		40.00
29/09/2017	C - Condoms Female (FC1) / 1 unit	1	10.00	10.00	1.25	0.00 Rs	CASH		11.25
Total Charges This Visit									221.25

Type	Payment Method	Reference	Payment Amount
Prepayment	Cash		181.25
New payment	Cash		60.00
Total Payments This Visit			221.25
Balance Due			0.00
Posting Date			2017-10-01

Save

First Clinic 1
Street 1
City 1, State 1
444.999.222

Client Receipt for Invoice 000721

LINDA Addison
Mermaid Rd

Payments	Checkout Receipt Ref	Payment Method	Ref No	Amount
29/09/2017	000721-1	Cash		181.25
01/10/2017	000721-2	Cash		60.00
Total Payments				Rs 221.25

Beginning Account Balance 0.00
Total Visit Charges 221.25
Adjustments 0.00
Payments 221.25
Ending Account Balance 0.00

40 YEARS HELPING VULNERABLE POPULATION

Printed on October 1, 2017

Print Checkout Generate New Receipt Number Void Last Checkout Void All Checkouts Show Details

emr.ippf.org says:

Re-opening this visit will cause a void. Payment information will need to be re-entered. Do you want to proceed?

OK Cancel

Void Dialog - Google Chrome

emr.ippf.org/emr/41x/interface/patient_file/void_dialog.php

Void Reason: Service - Added

Void Notes: Client required adding 2 services to original invoice

Submit Cancel

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.

Observations

Modifying a TS requires supervision and compliance with fiscal regulations.