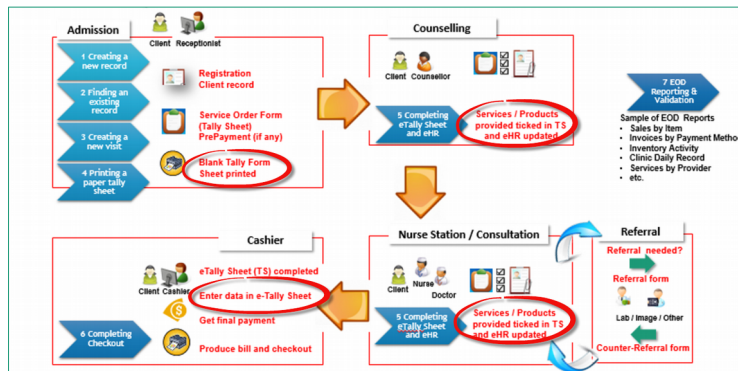| Process Guideline | 1.5.0 | Completing an Electronic Tally Sheet | All users| Administrative | Clinic |
|---|---|---|---|
| OpenEMR version | 4.1 | Last update | Sept. 25, 2017 | Author(s): X Gonzalez |

Page 1 of 2

Steps	Menu	Tally Sheet role	Verification	Print out

1 eTally Sheet Role

The Tally Sheet (TS), in its digital form, plays a central role in the OpenEMR visit cycle when the clinic has computer resources in the consulting room and other clinic workstations.

In this case, the printed form is not necessary as clinic staff record services and products provided in the same server-based or cloud-based electronic Tally Sheet.

At the end of the visit, during checkout, the cashier has all services & products provided onscreen, and proceeds to verify data and process checkout.
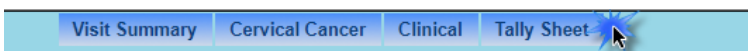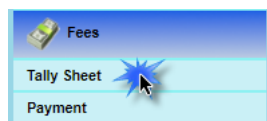

2 Activating a client & visit

Tally sheet transactions are related to both an "active" client and an "active visit". Therefore, in order to process Tally Sheet transactions, a client record must be either:
A) created or found, and a visit B) created or C) reopen from the Visit History.

3 Opening the Tally Sheet

Once the client and visit are active, the user has two options to open the Fee or Tally Sheet: The Fees menu and the Visit Summary top menu.

4 Tally Sheet data elements

Tally Sheet data elements include:
• Service packages: Pre-configured sets of services to facilitate data entry (i.e. one package includes several services)
• Serv/Prod groups: Pre-defined sets of services and products to organize individual services (e.g. SRH-HIV/AIDS, SHR-Obstetrics, etc.)
• Service details: Individual services within a group (SHR-Obstetrics in the example above)
• Search criteria: MA service list, ICD9 or ICD10 Dx codes, NAVision codes, Administrative services

Process Guideline	1.5.0	Completing an Electronic Tally Sheet	All users | Administrative | Clinic
OpenEMR version	4.1	Last update	Sept 25, 2017	Author(s): X Gonzalez

Steps	Description	Adding services and products to the Tally Sheet

5 Adding services & products

In this example, services contained in the SRH-Gynaecology group are selected (ticked), and reflected in the pre-invoice below.

Similarly, a sample Female condom provided is selected and reflected in the pre-invoice.

Note: To provide a product there must be enough stock.

Services and products selected are tallied with their price according to the Price Level. Price and quantities can be edited.

Importantly, each service line is associated to a Provider, and each products to a warehouse. This allow control of services by provider and product stock.

Any service or product line can be Deleted by ticking the Delete checkbox and selecting the Refresh button.

Tally Sheet data can be:
• Saved, leaving the TS open
• Saved and Checkout, which closes the TS and the visit
• Cancelled

describe the process of completing an electronic Tally Sheet during the visit cycle

Process description	The electronic Tally Sheet (eTS) plays a central role in the visit cycle (see PG 1-0-0 Summary of Visit Cycle Process): 1) An eTS is updated at every counselling, nursing, medical, laboratory and Dx workstation by selecting the services or products provided; and 2) The cashier verifies all services and products provided at checkout
Pre-conditions	During the implementation process, the Association's service and product catalogues will be defined and mapped to IPPS 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	The Tally Sheet produces a pre-invoice that includes Type of service or product, its Code and Description, an editable default Price Level and Price, Quantity, Justify (for ICD9 billing), Provider/Warehouse, and Prescription (Rx) for products.