

Process Guideline

1.5.0

Completing an Electronic Tally Sheet

All users| Administrative | Clinic

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OpenEMR version

4.1

Last update

Sept. 25, 2017

Author(s): X Gonzalez

Steps

Menu

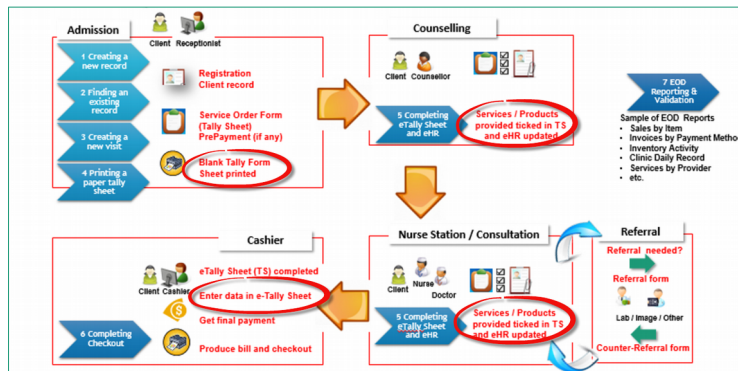
Tally Sheet role | Verification | Print out

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.

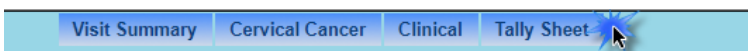
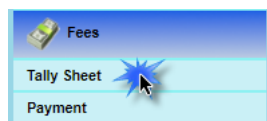


2 Activating a client & visit

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, SRH-Obstetrics, etc.)
- Service details: Individual services within a group (SRH-Obstetrics in the example above)
- Search criteria: MA service list, ICD9 or ICD10 Dx codes, NAVian codes, Administrative services

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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.

Tally Sheet

☐ Bartholins Surgery (GA)
☐ CA 125
☐ Cryosurgery
☒ **Gyn - General Counseling**
☐ Gyn - LEEP Counseling
☐ GYN - PAP Post Screening Counseling (Normal)
☐ GYN - Pap Test (test)
☐ GYN - Surgery - Other
☐ GYN - VIA Pre-Test Counseling
☐ Hospital service No 1
☐ Mammography
☐ Punch Cone Biopsy
☐ Vulval Biopsy

☐ Bartholins Surgery (LA)
☐ CA 125 (BRL)
☐ Diagnostic Imaging - Other
☒ **Gyn - Gynecological Consultation**
☒ **GYN - PAP Counseling, Importance**
☒ **GYN - PAP Pre-Test Counseling**
☐ GYN - Silver Nitrate Cauteury
☐ GYN - Surgery Breast Cancer
☐ GYN - VIA Screening
☐ Hysterosal/Pingogram
☒ **Manual Breast Exam**
☐ Shirodkar Suture (GA)

☒ **Bi-Manual Pelvic Exam**
☐ Colposcopy
☐ GYN - Cauteurization
☐ GYN - LEEP
☐ GYN - PAP Post Screening Counseling (Abnormal)
☒ **GYN - Pap Test (sampling)**
☐ GYN - Surgery - Menstrual Regulation
☐ GYN - VIA Post Screening Counseling
☐ GYN Breast Cancer Counseling
☐ Loop Cone Biopsy
☐ Polypectomy
☐ TCA

OK Cancel

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

Products

☐ C - Condom Tutti Frutti / 3 pack
☒ **C - Condoms Female (FC1) / 1 unit**
☐ C - Female Condom (FC2) / C-CON1
☐ C - Microgynon (Orals) / C
☐ C - Norister (Injectable 2 mo.) / C
☐ C - Trindiol / Trindiol
☐ Condoms MALE / Condoms
☐ papel bond t-c / 500 Pkg
☐ ZCondom Test / C: 144

☐ C - Condom Tutti Frutti / Box of 144
☐ C - Depoprovera (Injectable 3 mo.) / 3 mth
☐ C - Female Condom (FC2) / C-CON2
☐ C - Mirena (IUCD, Hormonal 5 year) / C
☐ C - Optinor (EC) / C
☐ C - Yasmin (Oral) / C
☐ Male Condom
☐ x - ABBA / ABBA
☐ ZCondom Test / C: 3

☐ C - Condom Tutti Frutti / Single
☐ C - Depoprovera (Injectable 3 mo.) / 3 mth x2
☐ C - Injectable (2 months) / C
☐ C - Norigynon (Injectable 1 mo.) / C
☐ C - Paraguard (IUCD, Copper 10 year) / C
☐ C - condom Male / C-condoms
☐ papel bond t-c / 1000 Pkg
☐ ZCondom Test / C: 100

OK Cancel

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.

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	1	-- Default --	-- Default --	<input type="checkbox"/>	<input type="checkbox"/>
MA	GYN-010	Gyn - General Counseling	General	0	1	-- Default --	Counselor, EN	<input type="checkbox"/>	<input type="checkbox"/>
MA	GYN-001	Gyn - Gynecological Consultation	General	100	1	-- Default --	-- Default --	<input type="checkbox"/>	<input type="checkbox"/>
MA	GYN-032	GYN - PAP Counseling, Importance	General	0	1	-- Default --	-- Default --	<input type="checkbox"/>	<input type="checkbox"/>
MA	GYN-034	GYN - PAP Pre-Test Counseling	General	0	1	-- Default --	-- Default --	<input type="checkbox"/>	<input type="checkbox"/>
MA	GYN-037	GYN - Pap Test (sampling)	General	50	1	-- Default --	Nurse	<input type="checkbox"/>	<input type="checkbox"/>
MA	GYN-100	Manual Breast Exam	General	0	1	-- Default --	-- Default --	<input type="checkbox"/>	<input type="checkbox"/>
Product 16	C - Condoms Female (FC1) / 1 unit		General	10	1			<input type="checkbox"/>	<input type="checkbox"/>

Save Save and Checkout Refresh Cancel

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.