## POSSIBLE ROLES: NURSE / DATA CLERK

## PROCESS 1.5.0: FILLING OUT THE electronic TALLY SHEET

#	Step	Observations	Menu options or screen information
0	Preliminary steps: Create or select a client and an active visit In order to enable the creation of an e-Tally Sheet, both a client and a visit must be active.	Name         Phone         SS         DOB           Aaron, Laura         04/02/1975           Abdullah, Fatima         604-234-567         880808-10-8         01/01/1978           Ada, Dortch         11/27/1979         02/11/1959           Addison, Joseph         02/11/1959	Find:  by: Name Client ID  National ID DOB  Any Filter
1	Create a new e-Tally Sheet (e-TS) This digital form resembles the paper Tally Sheet that records all services and products provided to the client during a visit.	Tarky Sheet	⊟ Fees Tally Sheet ◀
	Select Fees>Tally Sheet and a new digital form showing the service/product categories will be displayed.	And Paymer Beach **CCO ** MA To beach **CCO ** MA To beach **  Type Cash Pain to like Solven Probable Tables Description  Finishers Residency - Paint Series **  Finish (and) Connex **  Sen Solven Connex **	Checkout
2	Hint: Note that individual services will be grouped under drop-down menu headers according to the classification made when those services were defined. (If a service you need does not appear in the e-Tally Sheet, ask your system administrator to include it).	Description   Comment   Description   Comment   Description   Descript	Service creation/edition form  Type:  MA
3	Select the appropriate Price level (which should have been defined in the configuration phase). This will ensure that prices automatically displayed will be the correct ones	Sample Price levels: Special: for special occasions eg. Mother's day: Membership: for clients holding a member status; Promotion: for special products  Warning: You need to select the required special prices (if any) BEFORE selecting the service/product in the Tally Sheet, for the price to be applied correctly	Special Membership General Promotion Nurse Price List Price Level: General
4	Select Services provided Select all services provided in the corresponding service categories (pull-down menus) indicating Providers (default provider to be defined later). These services will be reflected in the Client Bill section in the Tally Sheet. Hint: If Price, Units or Provider different from default values, modify them accordingly	Client Bill Section   Type Code	SRH -Gynecology SRH -Gynecology Bartholins Surgery (GA) Bartholins Surgery (LA) CA 125 CA 125 (GRL) COloscory Cryosurgery Hysterosal/Pingogram Loop Cone Biopsy Pap Smear
5	Select Products provided Select all products provided in the Product category. These products will also be reflected with their corresponding price in the Client Bill Section. Hint: If Price or Units are different from default values, modify them accordingly	Client Bill Section  Product 11 20.00 1 Depoprovera  Product 19 0.10 1 Aspirine	Products Products 19-Aspirine 18-Baralgin 17-Curam 11:T-1 Depoprovera
6	Enter a payment You can also enter cash transaction data in the e-TS, such as a payment, when the client comes to the clinic just to pay for a service previously received, or when you know a payment must be recorded before going to checkout	Add Payment Search ICD9 • MA for Search  Type Code Price Units Service Provider Delete Description  Payment 100(00 - Default - Cash	Note: This payment does not imply that the visit is being closed (i.e. closing the visit occurs after recording payment at checkout only).
7	Define Default Provider and Save Tally Sheet After defining Default Provider and verifying the Client Bill onscreen, you must save the completed TS to record all transactions made. Note: Before checking out, you can re-open, modify and save the TS as many times as you need.	Price Level: General   Default Provider: EN. Doctor  Sase Refresh Cancel	⊟-Fees Tally Sheet <b>←</b> Checkout
8	Deleting items from Client Bill You can delete any of the charges applied to the Client Bill by marking the Delete checkbox and selecting the Refresh button or Saving the TS.	Type	
9	Reopening a Tally Sheet Once you have completed the visit cycle (client has been checked out), the TS cannot be modified. If needed Reopen it by reversing the checkout (See Completing the Checkout guide).	This encounter has been billed. If you need to change it, it must be re-opened.  Type Code Price Units Service Provider Delete Description  Payment -30 00 - Default - Cash  MA 255004 30 00 1 - Default - Papamear	Note: When the checkout is reversed, the TS reopens with a negative payment, which should be deleted. If in doubt, please check with your system administrator.