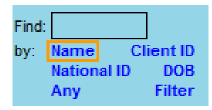
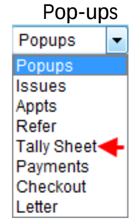
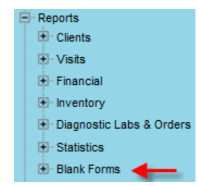
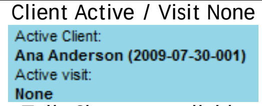
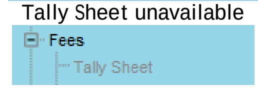
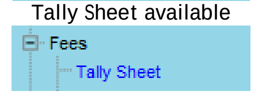
SUMMARY GUIDE OF VISIT CYCLE PROCESSES – VERSION 4.0 (June 2010)

POSSIBLE ROLES: ADMIN & CLINIC STAFF	PROCESS 1.1.0 to 1.7.0

#	Step	Observations	Menu options or screen information
1	1.1.0 Creating a new OpenEMR record	First, you create a client record if it is has not been already created **Note:** OpenEMR version 3.1.1.7 or higher has a new Non-Duplicate mechanism	
2	1.2.0 Finding an existing OpenEMR record	Or, if client record already created, find and activate client **Note:** OpenEMR version 3.1.1.7 or higher has a new Non-Duplicate mechanism	
3	1.3.0 Creating a new Visit	Then you need to enable the Visit Cycle by creating a visit. Be careful not to have more than one visit open for the same client, by checking the Visit>List option or an updated Appt-Visit report. You can have multiple visits open for <u>different</u> clients	
4	1.4.0 Printing a paper Tally Sheet (TS)	Print a blank Tally Sheet format with the active client data. This will allow all service providers to tick services/products provided to client, plus some key additional visit data. **Hints:** To activate the Popups drop-down menu first activate a client. If you need a blank Tally Sheet not associated to a particular client (for instance, to obtain photocopies), use the main menu options: Reports > Blank Forms > Tally Sheet	Pop-ups  Main menu 
5	1.5.0 Completing an electronic Tally Sheet (TS)	In an ideal situation, if one or more clinicians have access to the system, they may fill the e-Tally Sheet directly, so when the client goes to the cashier for checkout, most or all service and product data will be in the system. On the other hand, if these data is only recorded in the paper TS, after the client has received all services and/or products the cashier must copy these data from the paper Tally Sheet to the electronic Tally Sheet, in order to build the Client Bill. **Hint:** In order to create a Tally Sheet you need both an active client and an active visit	Client Active / Visit None  Tally Sheet unavailable  Client Active / Visit Active  Tally Sheet available 
6	1.6.0 Completing Checkout – Closing the Visit Cycle	Once the client has paid the amount due, the cashier will issue and print a sales receipt. This action will "close" the visit. Note: if changes are required after checkout, this process can be reversed. Please note that only users with "Administrator" rights are able to reverse the check out	
7	1.7.0 EOD Reporting/Validation Procedures	Finally, a battery of End of Day reports should be printed for reporting and validation.