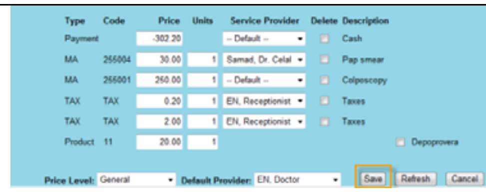
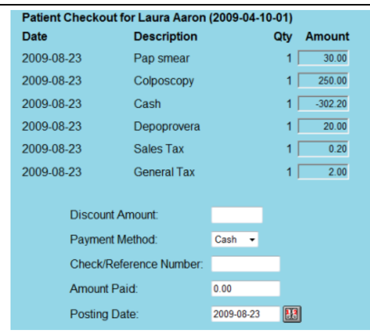
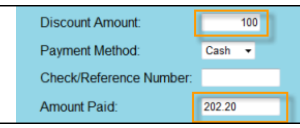
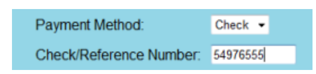
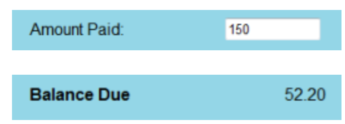
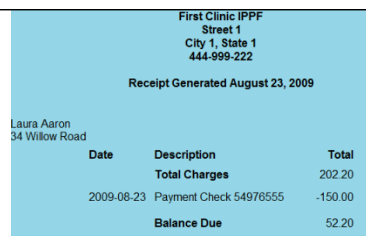
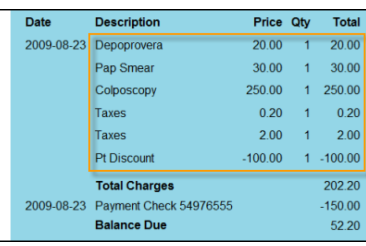
PROCESS DESCRIPTION – VERSION 4.0

POSSIBLE ROLES: NURSE / DATA CLERK	PROCESS 1.6.0: COMPLETING CHECKOUT – CLOSING THE VISIT CYCLE

#	Step	Observations	Menu options or screen information
0	**Preliminary steps:** Before checkout, a Tally Sheet must be thoroughly completed, so the Client Bill reflects all services and products the client received, and individual/default providers are defined. These data must be then **Saved**.		
1	**Select Checkout** **Menu options:** Select Fees > Checkout The final Client Bill will be displayed, including taxes (if any) and the following additional financial controls: • Discount amount: if client needs a discount • Payment method: cash, check, credit card… • Check/Ref #: Check or transaction number • Amount paid: actual amount may be different from amount due • Posting date (default: today's date)		 **Note:** You can use a posting date different from Today's date. This is useful, for instance, when you want to record the transaction after office hours, with tomorrow's date
2	**Applying a discount** If you type an <u>authorized</u> discount amount, this will be automatically reflected in the Amount Paid field.	**Note**: A discount policy should be explicit and access right to apply discounts controlled.	
	Specify Payment Method / Reference If needed, select an option different from Cash in the payment method drop-down menu. Complement this with a reference number.	**Note:** In most cases, payments will be in cash. However, the system allows other types of payment: check and credit card.	
	Handling Credit balances If you type an amount different from the amount due after discounts (if any), then you would be granting a credit, which will be reflected in the final invoice as a "balance due".	**Note**: A credit policy (if any) should be explicit and access right to apply discounts controlled.	
5	**Record payment and produce Receipt** By pressing the **Save** button in the Payment window, payment is recorded and a printable receipt is produced.		
	Display/Print details If required, select the **Show Details** link to display (and print) a detailed invoice. Toggle the **Hide Details** link to return to the summarized view. Select the **Print** link to send these data to printer.		
	Undo Checkout If for some reason you need to change the Tally Sheet or the Client Bill data, you will need to select the link **Undo Checkout,** select the "Yes, Delete and Log" button, and then Accept this change. To do this, you need to have the appropriate rights and user level.