

Get the most out of



Business Intelligence User Guide

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Overview

Business Intelligence gives access to a wide range of reports. The screen below will show the various areas which can be reported on.



General Reports

These are the reports shown in the main screen of business intelligence and are broken down into sections, for example, "Till", "Correspondence", "Orders", "Stock" and "Appointments".

These reports can be run to give information by a specific day, Week, Month, Year, Quarter 1, Quarter 2, Quarter 3, Quarter 4, and Year To Date.

Each report may offer further choices to select depending on the type of report being run.

Dashboards

(This is covered in a separate manual) These reports will show an overview of how your business is doing, reflecting the patient journey through FLEX in graph format.

Data Mining

(This is covered in a separate manual) However, this offers the ability to drill down into your patient database to identify important trends, analytics, and patient information.

Page.

Till Reports

This suite of reports will show sales, payments report, details on vouchers, refunds, credits, discounts, and everything needed for VAT and Accountancy.

To select the Till reports

• Click on the "Till" square at the top of the screen, then select from the list below.

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- You will see there is a scroll bar within the list of reports to show there are more available.
- o Click on the report you want to run
- By selecting a report such as **Balance by PX**, you will be able to then...
- Select the time frame you are wanting to look at.
 - This can be done by clicking on any of the buttons for Today, Week, Month etc
- o If only wanting a specific single date, use the Selected Dates area.
- When your selections are complete, click on the green circle with a white arrow.
- The Data will be produced on the screen for viewing before printing out. (As below)

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		Branch: Sar	nsEyeCare				16/06/2022	
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H All C C 10 All C C C 11 All C C C 11 All C C C 12 All C C C 13 All C C C 14 C C C C 15 C C C C 16 C C C C 16 C C C C		SamsEyeCare						
		Px Ref	Name	Sales	Payments	Balance		
2 11 Minus		2234	Allitt, Paul (Mr)	1,202.00	910.00	292.00		
Image: constraints Image: constraits Image: constraints Image: c		13533	Barlow, Anne (Ms)	750.00	200.00	550.00		
() () () () () () () () () ()		11486	Betts, Francis (Mr)	176.71	137.61	39.10		
i		5006	Boby, Alan (Mr)	50.00	0.00	50.00		
)		12449	Bowler, Christopher (Mr)	200.81	136.51	64.30		
r		15132	Brain, Nicola (Miss)	585.00	250.00	335.00		
r		13561	Buchanan, Beverley (Mrs)	210.71	21.71	189.00		
1		3331	Burke, Rosy (Mrs)	1,185.00	595.00	590.00		
1		8583	Catlin, Suzie (Mrs)	1,631.00	1,116.00	515.00		
1		11018	Creed, Olivia (Miss)	218.21	179.11	39.10		
1		13546	Cross, Adam (Master)	131.71	92.61	39.10		
1		184	Cullen, Anne (Mrs)	1,612.00	1,483.00	129.00		
1		15896	Davies, Andrew (Mr)	1,583.09	700.00	883.09		
	_	14343	Desmond, Daniel (Mr)	936.50	851.50	85.00		-/

(This one is an example of **Balance by PX**)

 \circ $\,$ An option to print will be on the top left of the screen.

An example of a variation to the report selection criteria would be for the **Payments** report as below. This will not only allow a date selection but a payment type.

Available Reports	Eduction Educio			
a Till △ - jj Balance by Px - jj Balances	Select Date Range Today Week M	forth Vear Quarter 1 Quarter 2 Quarter 2	B Quarter 4 YTD	
Cashing Up Overview Cashing up Summary Corporate Corporate Corporate PO Invoice Credited Items Discounts Patient Account Italiances Patient Account Transactions Patient Account Transactions Payments Payments By Group	Branch SarroByeCare	Selected Dates From 01/01/2021	Puyment Type Cheque Cheque Cheque Cheque Cheque Solo Visa Voucher Voucher Voucher C Mastercand Visa Debit Maestro Other American topress Sinht live	
Payments By Group (inc. Collections Payments By Group By Cashing Up Payments By Nominal Code Payments By Nominal Code			Voucher A. Wourher F ©	Preview



With this report when it is run, there will be two options to select.

Flex		\times
2	Choose a report type	
L	Summary Detailed Cancel	

Page

Summary

Will give a breakdown of payment methods and amounts, which will usually be a one page report.

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	Till - Payments Report 01/01/2021 - 16/06/202	t: 22	
	Branch SamsEyeCare Payment Type AMEX BACS Card Cash Channel	Amount £17,999.41 £1,638.01 £95,196.48 £50.65 63	
i M M M M D	Criegae Corporate Credit Note eGos Voucher Mastercard Other	£2,003,00 £2,800,50 £2,807,96 £1,41,430,45 £481,50	
4 4 0	Other Voucher Sight Test Visa Voucher A	<u>£8.80</u> <u>£64.73</u> <u>£229,250.13</u> <u>£430.10</u>	
	Voucher B	£118.60 £495,612.30 £495,612.30	

Detailed

Will give you an in-depth report, showing the payment methods, Patient names, their number, receipt number and date together with total amounts.

									— X	С
Display Find Edit Print Save General Clipboard	100% Page width Entire 🕞 page Zoom	100% (+) Sir	ngle Two pages Displ	Cover page	Thumbnails	1 / 195 ★ ★ ★ Move Pages M	Selection ode			
									16/06/2022	
				Payment	ts Report - Deta	ils				
	<u>Branch:</u> SamsEye0 <u>Transaction Date:</u> 02/ Payment Method:	Care 01/2021 Cash								
		Amount	Туре	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date	
Carses and		45.00	Payment	0.00	17:13	Lovell, Joanna (Ms)	12820	43786	02/01/2021	
Analysis in	Method Total:	45.00		0.00						
	Payment Method:	Mastercard								
		Amount	Туре	VAT	Transaction Time	Patient Name	Patient #	Receipt #	Receipt Date	
- Charlest sectored		21.50	Payment	0.00	10:18	Hartigan, Samantha (Mrs)	11031	43774	02/01/2021	
		805.00	Payment	0.00	12:07	Hankin, Jeffrey (Mr)	13420	43777	02/01/2021	
		240.00	Payment	0.00	13:01	Dixon, Jessica (Miss)	7536	43778	02/01/2021	
		760.00	Payment	0.00	14:46	Kingston, Wendy (Mrs)	11132	43779	02/01/2021	
		190.00	Payment	0.00	15:06	White, Bradley (Mr)	14687	43780	02/01/2021	
		180.00	Payment	0.00	17:02	Short, Ruby (Miss)	10749	43785	02/01/2021	
Contractor function of the function of		461.50	Payment	0.00	17:02	Short, Laura (Mrs)	12391	43782	02/01/2021	
Contraction of the Industry	Method Total:	2,658.00		0.00						
	Payment Method:	Visa								
· ·		Amount	Type	VAT	Transaction Time	Patient Name	Patient #	Receint #	Receint Date	

Page**b**

This very possibly will be over a number of pages as shown below.

Note

There is also the ability to export the report that has been run.

• Select **Export** under the green circle with the arrow.



• Then chose the folder to export the report to.

		87 🔹 🚷
V Folders (6)		
△ Desktop		
Downloads Music		
Pictures Videos		
✓ Devices and drives (1)		
OS (C:) 300 GB free of 475 GB		
V Network locations (3)		
General Data (G:) sheath (\\onuk-dc-01\Private User		
:t a folder for your export		
	Select Folder	Cancel

- Flex will then confirm that the report has been exported.
- This can then be opened from the location saved.

Correspondence Report

This report will give information about any activity in relation to Email or SMS that have been sent.

Again, select the time frame you are want to report and then click the green circle.

There will be an option to print a summary or a detailed report here too.

The summary will show the number of correspondences that have been sent. Details will show: The date and time the email or SMS was sent will be listed together with the patient's name.

Page

Orders Report

Here contact lens reports can be run.

Contact lens

- Make date selection
- Click on the green circle to run the report (remember to select preview or export)
- There is no option for the summary on this report, so you will get full details.

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					Bra	nch: Sam	sEyeCare		Cont	act Lens Ord	er Rep	ort					16/06/2022
					R	Compan Order# Patient Type equired By	y Con 7,403 c Heath, Sam	oper Vision ^{neated} 15/12/2021 (Miss)		Deliver To Optinet Malvorn WR14 2AZ				Ň	Write sup	pplier refe	erence below
					R	Pack Size Design Design	Order Qty Options Options	l Biofinity XR Toric Biofinity XR Toric	ens Descrip	tion	BOZR 8.4 8.4	TD 14.2 14.2	Sph Plano Plano	Су	Axis	Add	
						Order# Patient Type	7,404 c Neath, Sam	reated 12/01/2022 n. (Miss)	-	Deliver To				N	Write sup	pplier refe	arence below

Contact Lens Collection

This report will show, each patients contact lens order which is ready for collection. This is based on the due date which will have been entered when processing the order in flex.

Print -	Save al Clip	copy 100%	Page width En pa	tire \ominus ge	100% (Single Two page Display mode	1 / T	1 ↓ ±	Move	e Se Mode	T lection			
TiPoort,	TITUTI		Branch: SamsE	yeCare									16/	06/2022
			Supplier : Jo Patient : 15	hnson & Johnso 951 Heath, S	on Sam (Miss)	Next S	ight Exam	Due: 05	/04/2023	N	ext After	rcare Du	ie: 22/03	/2023
			Branch SamsEyeCare	Collection Due 15/06/2022	Eye Right	Lens 1-DAY ACUVUE MOIST (minus powers)	BOZR 8.50	TD 14.30	BVP	Cyl +0.25	Axis 6	Add +2.00	BOZR 2	BVP 2
			SamsEyeCare Solutions : Co	ntact Lens solut	Left	1-DAY ACUVUE MOIST (minus powers) General Notes :	8.50	14.30		+0.25	6	+2.00		

Page

Stock Reporting

There are several reports which can give you details of your stock in practice.

- All Stock Valuation
- Frame Stock by Age
- Frame Stock Take
- Frame Stock Valuation
- \circ Solution Stock Valuation
- Stock Movement
- Sundry Stock Valuation

All Stock Valuation

- When selecting All Stock, FLEX will give the option to select *all* of the sales groups or just specific ones.
- o If there is more than one branch, branch selection is required.
- Select a date the stock figures are needed to.
- Quantity will all the report to only show items that are over certain amount if needed.
- Supplier and Gender can be selected too. All will be selected by default otherwise click on the ones you want to report on. (To select more than one hold the Ctrl button down and click on all required)
- Click green button to run.

inet Staff Member Branch: SamsEyeCare (1376:	3196) Version:	1.5.7.15			SM	AS & Em	hail Notif	ications: DISA	ABLED			Thu	rsday 16 Ju	ne 11:22:40
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Branch	h: SamsEyeCare													16/06/2022
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					Up To :	16/06/2	2022							
NO S	UPPLIER													
SAN	ISEYECARE													
8	Barcode Brand	Description	Model	Colour	Size	Qty	Cost	Total Cost	Book	Total Book	Retail	Total Retail	%GP	%GP (Book)
1235	50	Contact Lens solution				3	0.00	£0.00	0.00	0.00	£25.00	75.00	100.00%	100.00%
1235	i49	5555				1	0.00	£0.00	0.00	0.00	£0.00	0.00	0.00%	0.00%
3574	660123425	Aveeno				49	0.00	£0.00	0.00	0.00	£10.00	490.00	100.00%	100.00%
Bran	nch Totals					53		£0.00		£0.00		£565.00		
Supp	lier Totals					53		£0.00		£0.00		£565.00		
MAU	I JIM UK LIMITED													
SAN	ISEYECARE													
8	Barcode Brand	Description	Model	Colour	Size	Qty	Cost	Total Cost	Book	Total Book	Retail	Total Retail	%GP (Cost)	%GP (Book)
1235	i52 Maui Jir	m Maui Jim	MJO2123	purple/red	52x18x52	1	0.00	£0.00	0.00	0.00	£350.00	350.00	100.00%	100.00%
Bran	nch Totals					1		£0.00		£0.00		£350.00		
Supp	lier Totals					1		£0.00		£0.00		£350.00		
						E	Includ	e 'Display On	ly'	Inclu	ide 'No su	ıpplier'		Preview

Frame Stock by Age

This report will a report to be run to find out how long stock has been in practice.

- Select the stock age range, ie between 1 and 6 months
- o Quantity
- o Supplier
- o Gender
- o Run the report

Available Reports	Cile New Orleans			
Stock Frame Stock by Age Frame Stock Valuation Solution Stock Valuation Stock Movement Sundry Stock Valuation	Branch SamsEyeCare	Stock Age Between	Supplier Anglo American CooperVision Ltd Eye space Johnson & Johnson Luxottica MARCHON Maui Jim UK Limited	Gender Children Female Male Unisex
		Quantity 1 or more Include 'Display Only'	✓ Include 'No supplier'	Preview

• Details on Brand, Cost, Barcode, Description, Colour, Size, Model, Dated added and age in months will be listed against each supplier.

Displa	y Find Edit										
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ted typhyse											
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			branch. Sa	Inseyecare							10/00/202
	-						Stock Age Rei	port			
			Supplier :								
			Supplier : Brand	Cost	Barcode	Description	Colou	ır Size	Model	DateAdded	Age (Months
			Supplier : Brand	Cost 20.00	Barcode) 13	Description	Colou	r Size	Model	DateAdded 11/03/2022	Age (Months 3
			Supplier : Brand Supplier : Brand	Cost 20.00 Maui Jim Cost	Barcode 13 JK Limited Barcode	Description face Description	Colou	r Size	Model	DateAdded 11/03/2022 DateAdded	Age (Months 3
			Supplier : Brand Supplier : Brand Maui Jim	Cost 20.00 Maui Jim Cost 0.00	Barcode 13 JK Limited Barcode 123552	Description face Description Maui Jim	Colou Colou purple/red	r Size	Model Model MJ02123	DateAdded 11/03/2022 DateAdded 24/03/2022	Age (Months 3 Age (Months 2

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Frame Stock Take

This report will require the Quantity, supplier, and gender to be selected again as previous reports.

Frame Stock Valuation & Solution Valuation

These reports will give the option of summary or detailed report.

The summary will show Supplier, Cost, and Book Prices (If entered on FLEX) and Retail prices.

	Frame Stock valuation	i (Summary)		
Branch	SamsEyeCare			
	Supplier	Cost Price	Book Price	Retail Price
/laui Jim UK Limited		£0.00	£0.00	£350.00
Branch Total		£0.00	£0.00	£350.00
Group Total		£0.00	£0.00	£350.00

The detailed report will show figures together with all the details of the frame against each supplier.

					_									
					Frame Sto	ock Valı	uation							
MAUI JIM UK LI	MITED													
SAMSEYECARE														-
Barcode	Brand	Description	Model	Colour	Size	Qty	Cost	Total Cost	Book	Total Book	Retail	Total Retail	%GP (Cost)	%GP (Book)
123552	Maui Jim	Maui Jim	MJO2123	purple/red	52x18x52	1	0.00	£0.00	0.00	0.00	£350.00	350.00	100.00%	100.00%
Branch Totals						1		£0.00		£0.00		£350.00		
Supplier Totals						1		£0.00		£0.00		£350.00		
irand Total Qty	1		Gra	nd Total Cos	st £0.00		Gi	rand Total Bo	ok £0	.00	Gran	d Total Retail	£350.00)

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Solution Stock Valuation SAMSEYECARE Barcode Brand Description Model Colour Size Qty Cost Total Cost Book Total Book Retail Total Retail % GP % 123549 5555 0 1 0.00 60.00 0.00 60.00 0.00 0.00 0.00% 0.0)22	16/06/20							yeCare	anch: SamsE
SAUSEPIER Barcode Brand Description Model Colour Size Qty Cost Total Cost Book Total Book Retail Total Retail % GP % 123549 0 5555 0 0 0 0 0.00							I	luation	tock Va	olution St	So				
SAMSEYECARE Brand Description Model Colour Size Qty Cost Total Cost Book Total Book Retail Total Retail % GP (Cost) % (Cost) % (Co															O SUPPLIER
Barcode Brand Description Model Colour Size Qt Cost Total Cost Book Total Book Retail Total Retail % GP (Co.00% % 123549 5555 Contact Lens solution Encore Lens Solution															SAMSEYECARE
123549 5555 Image: S555 Image: S5555 Image: S55555 Image: S55555 <	GP (Boc	%GP (Cost)	Total Retail	Retail	Total Book	Book	Total Cost	Cost	Qty	Size	Colour	Model	Description	Brand	Barcode
123550 Contact Lens solution 3 0.00 £0.00 0.00 £25.00 75.00 100.00% Branch Totals 4 £0.00 £0.00 £0.00 £75.00 £75.00 upplier Totals 6 6 6 6 6 6 6 6 6 75.00 100.00%	0.00	0.00%	0.00	£0.00	0.00	0.00	£0.00	0.00	1				5555		23549
Branch Totals 4 £0.00 £0.00 £75.00 upplier Totals 4 £0.00 £0.00 £75.00 and Total Qty 4 Grand Total Cost £0.00 Grand Total Book £0.00 Grand Total Retail £75.00	100.00	100.00%	75.00	£25.00	0.00	0.00	£0.00	0.00	3				Contact Lens solution		23550
upplier Totals 4 £0.00 £0.00 £75.00 and Total Qty 4 Grand Total Cost £0.00 Grand Total Book £0.00 Grand Total Retail £75.00			£75.00		£0.00		£0.00		4						Branch Totals
and Total Qty 4 Grand Total Cost £0.00 Grand Total Book £0.00 Grand Total Retail £75.00			£75.00		£0.00		£0.00		4						pplier Totals
and Total Qty 4 Grand Total Cost £0.00 Grand Total Book £0.00 Grand Total Retail £75.00															
		£75.00	d Total Retail	Grand	00	ok £0.	rand Total Bo	Gr		t £0.00	and Total Cos	Gra		4	and Total Qty

Stock Movement

With this report there are various option which can be chosen to track the movement of stock within branch.

For example, if you have more than one branch it will details what you have transferred between branches. Any manual stock quantity adjustments etc

Available Reports			
 Stock All Stock Valuation Frame Stock by Age 	Select Date Range	Month Year Quarter 1	Quarter 2 Quarter 3 Quarter 4 YTD
Frame Stock Take Frame Stock Valuation Solution Stock Valuation Stock Movement Sundry Stock Valuation	Branch SamsEyeCare	Selected Dates From 01/01/2021 To 16/06/2022	Movement Reason Branch Transfer Cancelled Branch Transfer In Branch Transfer Out Delivery From Supplier Initialisation Manual Adjustment Down Manual Adjustment Up Released from Reservation Reserved For Patient Returned To Supplier Stock Take - OK Stock Take Correction - Ove Stock Take Correction - Ove

Sundry Stock Valuation

This report will need quantity and supplier (s) selected. Also there will be an option for summary or detailed report types.

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Appointment Report

This report enables the diary for a specific time frame to be printed out.

- o Click on Daily Reports
- Select time frame, either by clicking on relevant button or selecting the date(s)

Example of the diary print is below:

Branch:	SamsEyeCa	are						16,	/06/2022
			Ар	po	ointment Diary				
Date : Fri	day 24 Jun	e 2022	Room Na	me	: Optom Room 3				
Day Notes	5:								
Start Time	Patient #	Patient Name	Ag	e	Reason	Telephone			
09:00 AM									
09:30 AM	15951 /	Heath, Sam (Miss)	2	2	NHS Sight Test	- 07739488794	4 -		
09:50 AM									
10:00 AM									
10:30 AM									
44.00 114	0000	Out 14 A data (A A -)		7		04540000000	07040700000	07744004770	

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Additional Reports

If using **OPS** two reports are available.

- 1. Items for Collection
- 2. Outstanding Payments

If using **eGOS**

- o eGOS Claims can be reported on.
- o Select date range
- o Claim Type
- \circ $\,$ Select all the status's you want to report on.

Stock Turn

To the left of the reports screen which we have covered. There will be report called Stock Turn.

This is an analysis of relative stock sell-through, describing trends for selected categories of frames per quarter.

The categories for frames are comprised of Supplier, Frame Gender, and Frame material.

The quarterly sales are projected to an annual total for each frame within a category. The average number of units sold for a frame in this category is then calculated – giving the "Stock Turn" figure.

The probability is then calculated using the "stock turn" figure multiplied by the average total profit figure for this frame category.

Finally, the ratio of cost to profitability is calculated. The ratio (relative profitability) can be utilised to compare stock sell through. The higher the figure the better.

At the top of the screen there is a tab entitled "Compare Previous Quarter", click on this to make comparisons.

Home Mgi. Home								2	Mersa '
Dasibilitat da	Stock Turn: 01/04/2022 to 30/06/2022	C.Mett.						(Secol	elee •
Reporting	Current Quarter					- COnguna	Previous Querters		-
with General	Edurag	Y	Shitten 4	Total City 4	Avg.Posts	ter Parat 4	Number of Some R	Featurity 9,	Rate St.
The second second	Maul Inn UK Ummed / Remain / Plantic		8.00	10.00		6100.00	1	83.800.00	0.00
* 2 Store	MARCHON / Univer / Pull Rive		8.00	6216.00		6592.00		04,736.00	21.90
(1 Shorth Tarra	NANDHON / Turnale / Full New		0.00	10.05		\$129-00	1	60.00	0.00
A THE OWNER	Anglo American / Terrule / Plaitic		4.00	\$250.00	8	10.00	1	00.01	0.00
월 Submissions 월 Payments 1945 England Claime 월 #Opretuatric Claime									
- J I've Vist Notifications									
	Decrytion	4' Cay Sold 4'	Cost 4	Intal 4 Int	w Cost 4 1	ical flatall . Q	Marger Horgi 4	Margin to R. An	walted Sales 🐴 🕈
	# Anglo American / Female / Plastic								
	Rayban C1	100	6250.00	6258.08	6250.00	6250,00	60.00		4.00
	Projected Stock Turie 4	1.00	4250.00	6250-00	6250.00	\$250.00			4.00
	14 MARCHON / Famale / Full Rise								
	VIL2005	0.00	87,29,00	80.00	10.00	80.00	8-129.00		0.00
	Projected Stock Turre 0	8.00	6129.00	48.00	68.003.00	60.00			0.08
	* MARCHON / Univar / Full Rim								
	001195	2.00	6.008.00	1705.00	1216.00	£1,400.0E	6582.00		-8,00
	Projected Stock Turn: 8	2.00	\$106.00	£798.00	1216882.00	\$1,400.00			6.00
	** Maul Jim UK Umltail / Female / Plastic								
	Mail fem	2.00	10.00	\$705.00	10.08	£1.400.05	5700.00		4.00
	Projected Stock Turve 8	2.00	60.00	(791.00	636890.00	£1,400.00			6.00
D 61667									

The next report available is Vouchers.

Voucher Submissions & Payments

This report will summaries all voucher submission information. This will list the till date, receipt number that was processed, the type of voucher, the value of the voucher, its status and the patient's name.

There are filters at the top of this screen to get the relevant information. For example date selection. This will be the date you want to run your voucher submissions up until. Type will be if it's a sight test or a voucher. The status will be pending, Ready to Go or Submitted.

The payments will be the same format.

NHS ENGLAND

If using eGOS, the NHS England Claims will also be accessible through the **NHS ENGLAND** report below Voucher.

Example of the data selections which can be made within these reports are as per screen shots 1 and 2.

	eOphthalmic Claims	Pre-Visit Notification
👻 📕 Voucher	Claim Reference Search	Filter By Date
- Submissions	Claim Dates	From 16/03/2022
Payments	From 09/06/2022	Refresh Table
NHS England Claims	To 16/06/2022	Refresh PVNs (NHS Servers)
eOphthalmic Claims	Claim Type	Filter By Venue
Pre-Visit Notifications	GOS3 GOS3_VO GOS4 GOS5	
	O Finished O Unfinished	Status
	Accepted Awaiting Review	Accepted
	Cancelled	Cancelled
	Closed	Closed
	Data Entry In Progress	Data Entry In Progress
	Draft	Draft
	Error	Error
	Failed Validation	Failed Validation
	Ready For Claim	Ready For Claim
	Sent For Payment	Sent For Payment
	Submitted	Submitted
	Terminated	Terminated
	Validated	Validated
	Withheld	Withheld