Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

User Guide to NHS Vouchers

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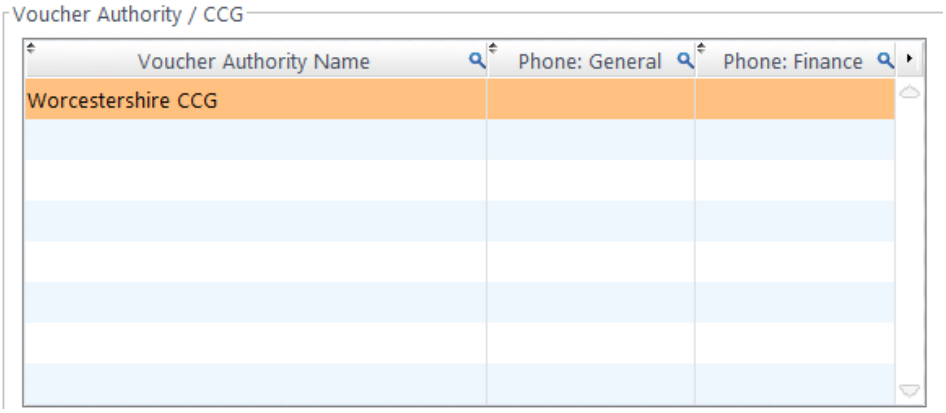
This quick-start guide tells you how to process your NHS vouchers. This feature is particularly useful if you have to report to multiple Clinical Commissioning Groups / Health Authorities / PCT's, for example if you conduct domiciliary work or offer NHS Enhanced Services.

Most of the setup and configuration should have been carried out by our support team / on your training day, but the start of this guide covers this too.

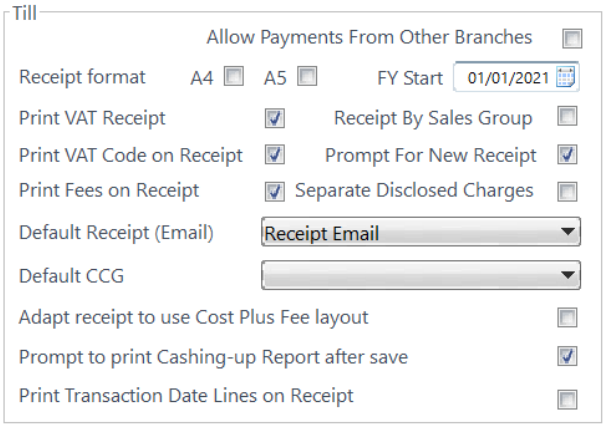
Setting up CCG's

These should have been set up for you, however if you need to add to or amend a Clinical Commissioning Group, click to **Menu – Setup – Till**, and click onto **NHS Vouchers**.



Double-click into an empty line to add a new CCG, or double-click into an existing CCG to update it.

A *default* CCG can be set up under **Menu – Setup – Branch**. Click into the **Data** tab and choose a CCG from the drop-down list. If no default CCG is setup, FLEX will ask the user to select from a list.



Vouchers on the Till

Press the relevant button on the Till (for example NHS Test) to charge for an item. FLEX may ask for the CCG to be chosen if a default has not been set.

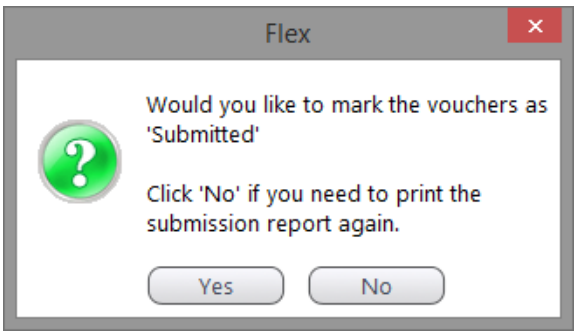
- The CCG can be changed by double-clicking the button shown to the left, which lives above the Till Buttons, just under the "Email Receipt" button. This will create the window shown below (with your CCG's shown).

- To mark an item as collected, double-click the button shown to the left, which lives above the Till Buttons, just under the "Email Receipt" button.
- It will ask for a collection date and then automatically tick the box. Hovering over it will show the collection date.

Vouchers in Business Intelligence

Business Intelligence – Reporting – Voucher.

1) Click on the menu option 'Voucher'->'Submissions'.
2) The filters will be set by default and a list of vouchers should be visible immediately. Changing the filters will update the list. These should all be self-explanatory, the tick boxes are explained below:
    - Pending: Non fee based vouchers that have not been marked as collected.
    - Ready to Go: Fee based vouchers & vouchers marked as collected.
    - Submitted: All vouchers that have been submitted to CCG, marked when a report is printed.
3) Right clicking a voucher will give options to **Mark as COLLECTED, SUBMITTED** or **Change CCG.**
4) The 'Print' button on the top menu bar will display the **Submission Report**. This is the "Top Sheet" to put with your GOS1 forms, GOS3 forms etc. In a similar fashion to other reports in FLEX, you can print this, export it, save it as a PDF and so on. Upon closing of the report window, you will be prompted to accept the report, at which point the vouchers are given a submission date and the status is changed. This is shown below.



Reconciling Payments

1. Click on the menu option 'Voucher'->'Payments'.
2. The filters will be set by default & the vouchers submitted in the most recent batch are displayed. Changing the filters will update the list immediately.
3. Right clicking a voucher will give options to:
    a. **Mark as PAID**
    b. **Mark as UNPAID**
4. The '**Mark ALL**' button on the top menu bar gives options to mark all vouchers as '**Paid**' or '**Unpaid**'. *Tip: Got 100 Vouchers where 99 have been PAID? Mark All as Paid, and then go back to change the status of the unpaid one*
5. The '**Print**' button allows a '**Voucher Payments Report**' to be printed by status.

There are 5 voucher statuses:

- **Pending**: Non fee based vouchers that have not been marked as collected.
- **Ready to Go**: Fee based vouchers & vouchers marked as collected.
- **Submitted**: All vouchers that have been submitted to CCG, marked when a report is printed.
- **Paid**: CCG has paid for the voucher.
- **Unpaid**: Voucher payment has not been received.