



Get the most out of



Schemes User Guide

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Scheme Models

When creating a new Scheme Type in Nova, you are asked to select a “Scheme Model”.

(This will be setup within the **Settings** > **Schemes**. Click on the green circle with the white cross and complete the details required). This will allow the items sold to be added to the scheme on the patient record.

How to setup schemes and their differences are as follows:

Pay in X

This is the simplest model in Nova. When creating a “Pay by X” model scheme you can select a receipt (or multiple receipts) to spread the cost over a set number of payments. This scheme model **does not** repeat. Schemes using this model would generally be used to pay off dispenses or large purchases, i.e Frames and Lenses.

When creating the scheme type you can specify a specific number of payments or leave the number of payments set to 0 if you want the scheme type to have a variable number of payments for each customer.

This scheme is being setup as a “Pay In X”, on a monthly payment plan over a six-month period. Starting on the first day of the month.

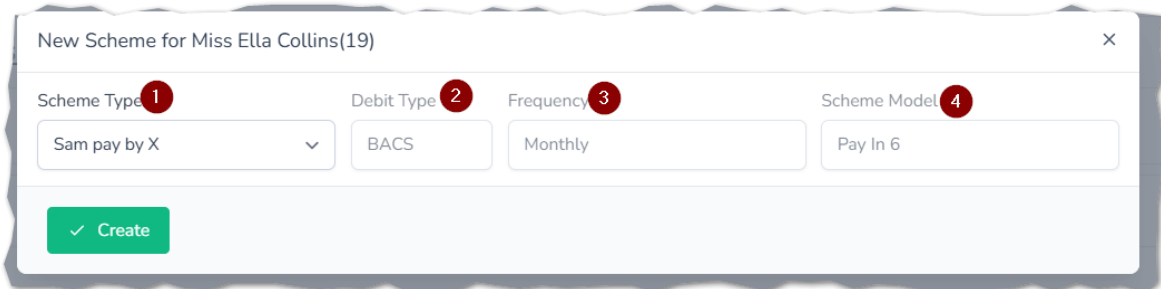
Once a “Pay In X” scheme has been created no further changes can be made to the items on the scheme and payments just need to be marked as collected until the balance is paid.

Adding a patient to a “Pay by X” scheme

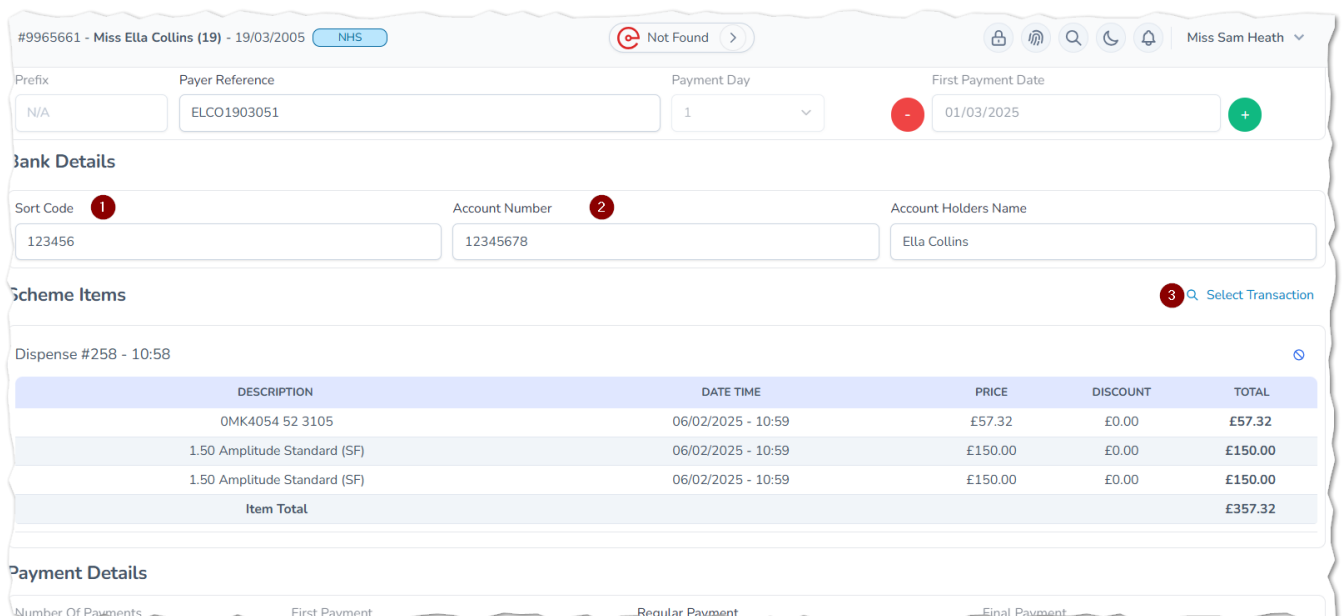
This is setup as follows within the patient record screen.

When the dispense is done, payment can be added to a scheme:

From Patient Record > Schemes, Click on the circle with the cross to add a scheme to this patient. Then select the scheme type from the drop down, this will then show the Debt type, frequency of payment and the Scheme Model. In this case it will run for 6 monthly instalments.

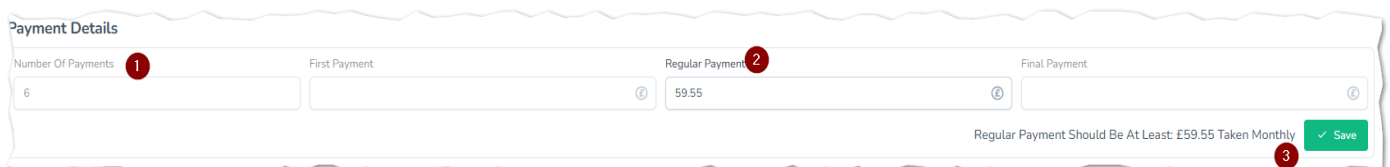


Then then fill in the bank details (1 & 2), and select the transaction (this is on the right of the screen (3))



DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
OMK4054 52 3105	06/02/2025 - 10:59	£57.32	£0.00	£57.32
1.50 Amplitude Standard (SF)	06/02/2025 - 10:59	£150.00	£0.00	£150.00
1.50 Amplitude Standard (SF)	06/02/2025 - 10:59	£150.00	£0.00	£150.00
Item Total				£357.32

Once that is done, the number of months the scheme is setup for and the payment per month will be at the bottom of the screen. Click **Save**



Confirm the scheme is to be started. The Scheme page will then show the items which have been added to this scheme and the payment amounts and the dates they are due will be to the right of the screen.

Payments – These can be updated on this screen. By clicking on the update button on the right of the payment line. Select the appropriate option i.e Paid.

Scheme History							
COLLECTION DATE	ITEMS	PRICE	PAYMENT DATE	PAYMENT METHOD	DUE	STATUS	RECEIVED
06/02/2025 View	OMK4054 52 3105	£57.32	01/08/2025	Scheme Payment	£59.55	Pending	£0.00 Update
	1.50 Amplitude Standard (SF)	£150.00	01/07/2025	Scheme Payment	£59.55	Pending	£0.00 Update
	1.50 Amplitude Standard (SF)	£150.00	01/06/2025	Scheme Payment	£59.55	Pending	£0.00 Update

Update Payment

Payment Date : 01/08/2025

Due Amount 59.55

Status: Pending

✓ Pending

Submitted

Paid

Part-Paid

Unpaid

Exempt

Part-Paid Amount

The scheme payment will show as below. The green line and the word paid . This will then show the outstanding balance at the top of the schemes page.

Scheme #641

Type: Sam pay by X

Model: Pay In 6

Status: Active

Balance: £-297.77 Debt

Ignore Anything Before

Enter Date

Options

Total Items Collected: £357.32

Total Payments Received: £59.55

Scheme History

COLLECTION DATE	ITEMS	PRICE	PAYMENT DATE	PAYMENT METHOD	DUE	STATUS	RECEIVED
06/02/2025 View	OMK4054 52 3105	£57.32	01/08/2025	Scheme Payment	£59.55	Pending	£0.00 Update
	1.50 Amplitude Standard (SF)	£150.00	01/07/2025	Scheme Payment	£59.55	Pending	£0.00 Update
	1.50 Amplitude Standard (SF)	£150.00	01/06/2025	Scheme Payment	£59.55	Pending	£0.00 Update
			01/05/2025	Scheme Payment	£59.55	Pending	£0.00 Update
			01/04/2025	Scheme Payment	£59.55	Pending	£0.00 Update
			01/03/2025	Scheme Payment	£59.55	Paid	£59.55 Update

Subscription

If the customer **pays a fixed amount** each month that covers the cost of Contact Lenses, Solution and Sight Exam Fees, regardless of the specific lenses they are wearing, and any additional items they might need such as extra solutions, then the subscription model is probably the option to use.

When using the **subscription model**, once a direct debit payment is marked as “**Paid**”, “**Part Paid**” or “**Unpaid**” a transaction is created which splits the amount paid across all items on the scheme. For each payment you then have a corresponding transaction on the till for the same amount. To make these payments, click on “**Update**” to the left of the screen. (Screenshot below)

Advantages and Disadvantages:

- Pros – Simple, easy to use
- Cons – Generic collection history (Collections can still be tracked using orders)

Ordering Contact Lenses to be added to the “Subscription” Scheme

Complete a Contact lens exam, and select which lenses are going to be added to the scheme.

From the Contact lens tab click on the three dots to the right of the lenses selected and “Edit Collection Schedule”. Select the number of months, weeks or days that the patient will want to collect, the collection date, auto order can be ticked here should you want to do that and then select the quantity of each lens is required. The pack size and price will also be on this page.

The screenshot shows a web interface for editing a contact lens collection schedule. At the top, there is a 'Close' button (red X) and a 'Save' button (green checkmark). The 'Monthly Total' is displayed as £450.00. Below this, the 'Primary Pair' section includes a 'Collect Every' dropdown set to '1' and a 'Months' dropdown. The 'Last Collection' is set to 'Never' and the 'Next Collection' is set to '06/02/2025'. An 'Auto-Generate Orders' toggle is turned on. The main table lists two items: 'Clariti Multifocal - HIGH ADDS' for the right eye (R) and the left eye (L). Each item has a quantity of 3, a pack size of 3, and a price of 75. The RX details for both eyes are (8.70 : 14.20) -5.00 / -0.25 x 30.00.

ITEM	RX	QTY	PACK SIZE	PRICE
Clariti Multifocal - HIGH ADDS	R: (8.70 : 14.20) -5.00 / -0.25 x 30.00	3	3	75
Clariti Multifocal - HIGH ADDS	L: (8.70 : 14.20) -5.00 / -0.25 x 30.00	3	3	75

On the contact lens tab there will now be a monthly cost entered.

Contact Lenses (3)

Primary Pair: Clariti Multifocal - HIGH ADDS
Secondary Pair: None

Last Collection:
Last Collection:

Next Collection: 06/02/2025
Next Collection:

Expand / Collapse

EXAM TYPE	START DATE	RX	LENSES	TYPE	SUPPLIER	STATUS	MONTHLY
CL Aftercare	06/02/2025	R: (8.70 : 14.20) -5.00 / -0.25 x 30.00 L: (8.70 : 14.20) -5.00 / -0.25 x 30.00	Clariti Multifocal - HIGH ADDS Clariti Multifocal - HIGH ADDS	Soft / Multifocal Soft / Multifocal	CooperVision CooperVision	Primary Pair	£450.00

Adding Patient to the “Subscription” Scheme.

Click on the Scheme section and the circle with the plus as before, and complete the bank details, then click on “Pay For Contact Lenses”, this will automatically bring through the contact lenses which were selected with the monthly cost.

Also with this type of scheme, additional items can be added to the scheme payment plan. This is done in the scheme’s screen by clicking on the blue “items” button. Select the item to be added to the scheme and the amount will be added to the monthly payment.

Package Details

× Hide Contact Lenses

Active Contact Lenses (£120.00 Per Month)

EXAM TYPE	START DATE	RX	LENSES	TYPE	SUPPLIER	STATUS	MONTHLY
CL Aftercare	06/02/2025	R: (8.70 : 14.20) -5.00 / -0.25 x 30.00 L: (8.70 : 14.20) -5.00 / -0.25 x 30.00	Clariti Multifocal - HIGH ADDS Clariti Multifocal - HIGH ADDS	Soft / Multifocal Soft / Multifocal	CooperVision CooperVision	Primary Pair	£120.00

Scheme Items (£0.00 Per Month)

1 Items : Other Actions :

DESCRIPTION	COLLECTION SCHEDULE	MONTHLY TOTAL
No Items Found		£0.00

Once the additional item(s) are added the cost will be shown.

Package Details

× Hide Contact Lenses

Active Contact Lenses (£120.00 Per Month)

EXAM TYPE	START DATE	RX	LENSES	TYPE	SUPPLIER	STATUS	MONTHLY
CL Aftercare	06/02/2025	R: (8.70 : 14.20) -5.00 / -0.25 x 30.00 L: (8.70 : 14.20) -5.00 / -0.25 x 30.00	Clariti Multifocal - HIGH ADDS Clariti Multifocal - HIGH ADDS	Soft / Multifocal Soft / Multifocal	CooperVision CooperVision	Primary Pair	£120.00

Scheme Items (£23.00 Per Month)

1 Items : Other Actions :

DESCRIPTION	COLLECTION SCHEDULE	MONTHLY TOTAL
2 Solution	1 to be collected every month (£23.00 each) - Collect In Store	£23.00

At the bottom of the screen the regular payment will be shown (1) and if the monthly payment needs to be increased to cover these item(s) then that will be shown too, click on Save and Start the Scheme.

Payment Details

Number Of Payments: N/A First Payment: Regular Payment: 120 Final Payment:

2 Regular Payment Should Be At Least: £143 Taken Monthly Save

Schemes & Payments Screen

This screenshot will show the **collection history** and **payments** made, including part payments within the **patient record** on the **schemes page** within the **view option**.

An example as to what happens if a part payment is made. A payment off £100 from the £198 which is required will then show a debit of £98.00. (Fig 1). This will also show on the patient record screen (Fig 2)

Scheme #638 Type: Subscription sam Model: Subscription Status: Active

Balance: £-98.00 Debt

Ignore Anything Before Enter Date Options

Total Items Collected: £396 Total Payments Received: £298

Fig 1

Scheme History

COLLECTION DATE	ITEMS	PRICE	PAYMENT DATE	PAYMENT METHOD	DUE	STATUS	RECEIVED	
04/02/2025	Procurear Multifocal XR +1.00 to +2.50 Near	£198.00	01/05/2025	Scheme Payment	£198.00	Pending	£0.00	Update
View			01/04/2025	Scheme Payment	£198.00	Part-Paid	£100.00	Update
04/02/2025	Procurear Multifocal XR +1.00 to +2.50 Near	£198.00	01/03/2025	Scheme Payment	£198.00	Paid	£198.00	Update
View								

Actions Recalls NHS Entitlement Portal Messages Patient Forms Appointments Exams Dispenses Orders eGOS EeRS Contact Lenses Schemes Transactions Notes Files

New portal message, click to jump to the section.

Default Branch: Brownbury

Schemes: -£98.00 Debt Balance: £137.50

Title: Mrs Date of birth: Doctor: Not set
Firstname: Emily Reference #: 9965660 Surgery: Not set
Surname: Gender: Female NI Number:
Previous Surname: Pronoun: Not set
Salutation: Mrs Emily Collins Ethnicity: Not set

Address Phones Email

ADDRESS DESCRIPTION DEFAULT No phones found ADDRESS DEFAULT

Home ☒

Contact preferences

Reminders / Recalls Marketing

Email ☒ Letter ☒ SMS ☐ Telephone ☐ Email ☐ Letter ☐ SMS ☐ Telephone ☐

Fig 2

Pay As You Go

If the practice wants to track exactly which items have been collected by each patient, have lenses priced up individually, and want the ability to charge additional items like extra solutions to the system. “**Pay As You Go**” is probably the option to use.

When using the “**Pay As You Go**” model, transactions for all contact lens orders are automatically created and assigned to the scheme. You are also able to select the “**Pay As You Go**” payment option for any regular receipt for that patient. For example if they came into pickup a new bottle of solution, it can be charged to their scheme.

Advantages and Disadvantages:

- Pros – Accurate scheme collection history. More Flexible
- Cons – More Complex

The following screenshot shows the “**Pay As You Go**” scheme, the schedule of payments on the right and on the left the breakdown of items collected (more detailed).

Scheme #639

Type: Pay as You Go

Model: Pay As You Go

Status: Active

Balance: £-155.00 Debt

Ignore Anything Before
Enter Date Options

Total Items Collected: £155

Total Payments Received: £0

Scheme History

COLLECTION DATE	ITEMS	PRICE	PAYMENT DATE	PAYMENT METHOD	DUE	STATUS	RECEIVED	
04/02/2025 View	Solution	£23.00	01/05/2025	Scheme Payment	£132.00	Pending	£0.00	Update
			01/04/2025	Scheme Payment	£132.00	Pending	£0.00	Update
04/02/2025 View	Proclear Multifocal XR +1.00 to +2.50 Near	£33.00	01/03/2025	Scheme Payment	£132.00	Pending	£0.00	Update
	Proclear Multifocal XR +1.00 to +2.50 Near	£33.00						
	Proclear Multifocal XR +1.00 to +2.50 Near	£33.00						
	Proclear Multifocal XR +1.00 to +2.50 Near	£33.00						

To add an adhoc item, such as extra solutions, will be done on the transactions page: (See Below)

Transaction Summary for Mrs Emily Collins

Patient Account: £0.00
Patient Total Spend: £895.00 - (Paid: £711.50 / Owing: £183.50)
Family: None
Corporate: None / Loyalty: None

£183.50

All Transactions

Date	Amount	Balance
04/02/2025	£597.00	£46.00
31/01/2025	£23.00	£0.00
30/01/2025	£275.00	£137.50

Active Transactions

04/02/2025 - Total: £597.00 Balance: £46.00

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
Solution *	04/02/2025 - 15:16			£23.00
Solution *	04/02/2025 - 15:16			£23.00
Item Total				£46.00

Standard #254 - 15:11

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
Solution *	04/02/2025 - 15:11	£23.00	£0.00	£23.00
Allocated To Scheme #639 *	04/02/2025 - 15:11			£23.00

Standard #253 - 15:11

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
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When the item(s) have been added to the transaction screen, payment will be taken by clicking on the **“Pay By Scheme”** button.

This will then be visible on the schemes page for that patient too. Note that the outstanding balance will also increase until a payment is made.

Scheme #639 Type: Pay as You Go Model: Pay As You Go Status: Active

Balance: £-201.00 Debt

Total Items Collected: £201 Total Payments Received: £0

Scheme History

COLLECTION DATE	ITEMS	PRICE	PAYMENT DATE	PAYMENT METHOD	DUE	STATUS	RECEIVED
04/02/2025	Solution	£23.00	01/05/2025	Scheme Payment	£132.00	Pending	£0.00
04/02/2025	Solution	£23.00	01/04/2025	Scheme Payment	£132.00	Pending	£0.00
04/02/2025	Solution	£23.00	01/03/2025	Scheme Payment	£132.00	Pending	£0.00
04/02/2025	Proclear Multifocal XR +1.00 to +2.50 Near	£33.00					
04/02/2025	Proclear Multifocal XR +1.00 to +2.50 Near	£33.00					
04/02/2025	Proclear Multifocal XR +1.00 to +2.50 Near	£33.00					