

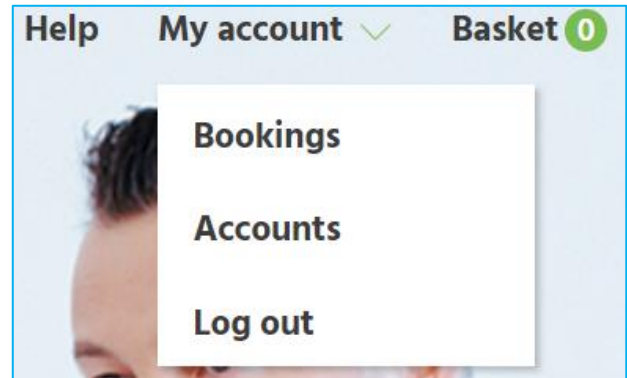
QRG8 – QUICK REFERENCE GUIDE

My Accounts



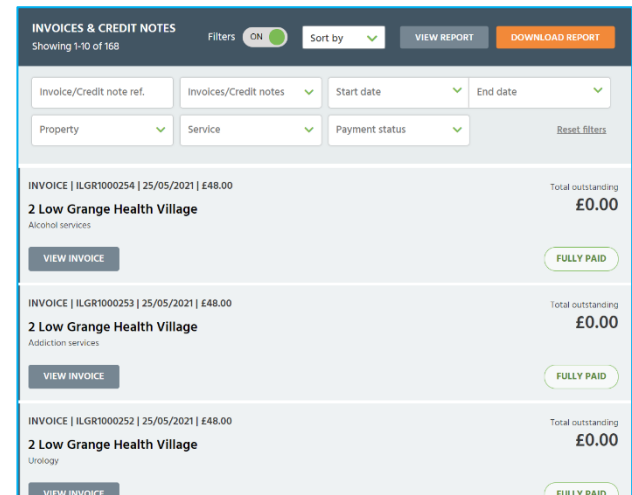
Viewing your Accounts

- Go to the My Account Dropdown menu and select the **[ACCOUNTS]** option.



Invoices and Credit notes

- You can use the filters at the top of the list to make it easier to find specific Invoices and Credit notes.
- You can filter by invoice/credit note ref, invoice/creditnotes, start and end date, property, service, payment status.
- If you do not set any filters, the invoices and credit notes list will display all your transactions.
- Each invoice line will include information regarding which property service and the date and amount that has been paid or is awaiting payment, and the payment status.
- If you wish to find out more information about your invoice, you can do so by clicking on **[VIEW INVOICE]**.
- On the next screen, you will be given a copy of your invoice giving you more information, including; date, booking reference, room, service, time, costs including and excluding VAT.
- It will also tell you the date the payment was applied
- You can print this invoice by clicking on **[PRINT INVOICE]**.



Outstanding Payments

- If you have any payments that did not process successfully for any reason, the total outstanding value of these will appear on the right hand side of the screen.
- Click on **[PAY]** in the top right hand corner of the outstanding payments box.
- On the next screen, click on **[PAY NOW]** to complete your payment for each outstanding amount.

PAY

OUTSTANDING PAYMENTS ?

You have outstanding payments across 3 invoices, current outstanding balance:

£1,368.00

VIEW REPORT
DOWNLOAD REPORT

INVOICES & CREDIT NOTES

Showing 1-2 of 2 Filters ON Sort by v

Invoice/Credit note ref.

Invoices v

Start date v

End date v

Property v

Service v

Payment status 2 v

Reset filters

INVOICE | ILGR1000240 | 18/05/2021 | £48.00 Total outstanding

2 Low Grange Health Village **£0.00**

Orthoptic - Chorley and South Ribble CCG

VIEW INVOICE
PAY NOW

INVOICE | IPRE1000137 | 27/04/2021 | £91.20 Total outstanding

Preston Healthport **£91.20**

Paediatrics services

VIEW INVOICE
PAY NOW

Showing 1-2 of 2

View your reports

- You can view and download your invoices and credits report by clicking on **[VIEW REPORT]** or **[DOWNLOAD REPORT]**. (This report will be based on the transactions you have filtered)
- You can also select which other reports you wish to view by clicking on the Reports drop down menu on the right hand side of the screen.
- You will have the option to view your full Invoices & credit notes report.

VIEW REPORT
DOWNLOAD REPORT

REPORTS

Please choose a report to view from the list.

Invoices & credit notes report ✓

MANAGES INVOICES/CREDITS
DOWNLOAD REPORT

INVOICES & CREDIT NOTES REPORT

Showing 1-10 of 168 Filters ON Sort by v

Invoice/Credit note ref.

Invoices/Credit notes v

Start date v

End date v

Property v

Service v

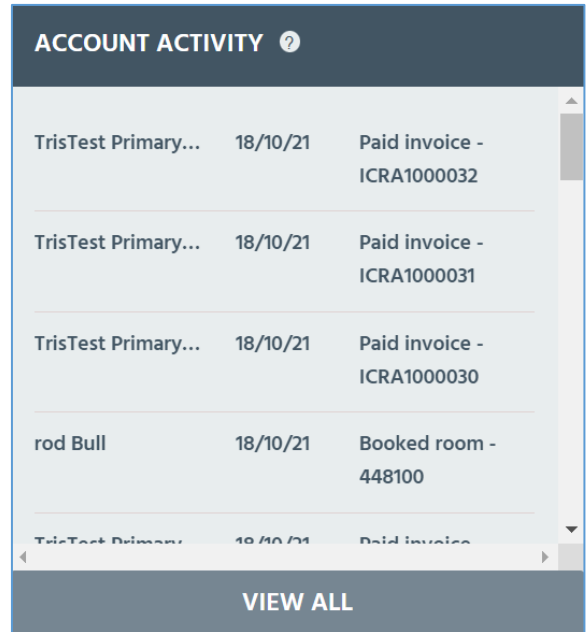
Payment status v

Reset filters

Property	Service	Billing contact	Payment order ref.	Invoice/CDN no.	Date	Value	Status	Outstanding
2 Low Grange Health Village	Alcohol services	nigel.nyatt@nhs.uk	15120SPACE	ILGR000254	25/05/2021	£48.00	Fully paid	£0.00
2 Low Grange Health Village	Addiction services	nigel.nyatt@nhs.uk	15190SPACE	ILGR000253	25/05/2021	£48.00	Fully paid	£0.00
2 Low Grange Health Village	Urology	nigel.nyatt@nhs.uk	15180SPACE	ILGR000252	25/05/2021	£48.00	Fully paid	£0.00
2 Low Grange Health Village	Alcohol services	nigel.nyatt@nhs.uk	15170SPACE	ILGR000251	25/05/2021	£48.00	Fully paid	£0.00
2 Low Grange Health Village	Addiction services	nigel.nyatt@nhs.uk	15120SPACE	ILGR000250	25/05/2021	£48.00	Fully paid	£0.00
Fallowth Primary Care Centre	Alcohol services	nigel.nyatt@nhs.uk	15030SPACE	FA1000080	21/05/2021	£165.60	Failed	£165.60
Fallowth Primary Care Centre	Alcohol services	nigel.nyatt@nhs.uk	15080SPACE	FA1000388	21/05/2021	£276.00	Fully paid	£0.00
Fallowth Primary Care Centre	Alcohol services	nigel.nyatt@nhs.uk	15080SPACE	FA1000387	21/05/2021	£196.80	Fully paid	£0.00
Fallowth Primary Care Centre	Alcohol services	nigel.nyatt@nhs.uk	15090SPACE	FA1000386	21/05/2021	£55.20	Fully paid	£0.00
2 Low Grange Health Village	Alcohol services	nigel.nyatt@nhs.uk	15070SPACE	ILGR000247	21/05/2021	£48.00	Fully paid	£0.00

Account Activity

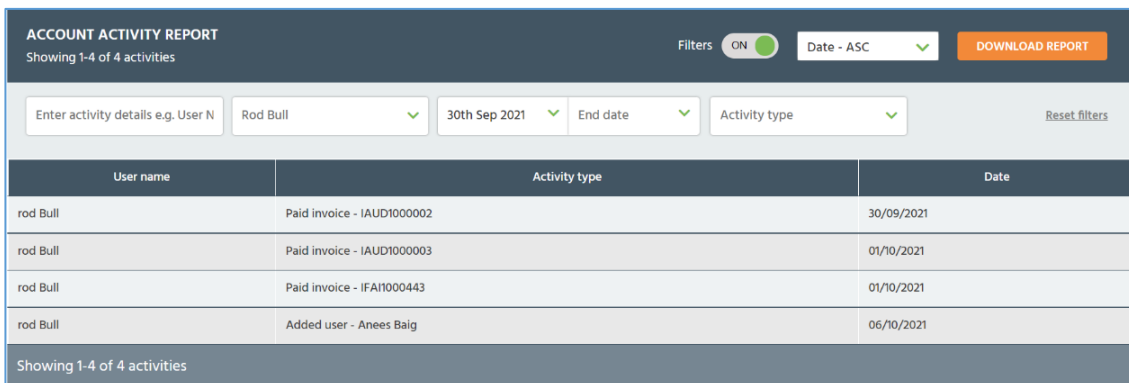
- This gives you a detailed view of all the activities and actions that are taking place on your Account.
- The type of actions that can appear are; Paid invoices, Booked rooms, cancellations, added and cancelled payment methods, added/removed users/hosts.
- It will only give you the most recent activity on your account. To see past activities, click on the view all button.
- The next screen will show you all your account activity.
- Use the filters to locate your desired activity.
- You can filter by activity details, user name, start and end date (it will default to today's date so this must be changed first, to find the data you require) & activity type.
- This information can be downloaded to Excel, by clicking on Download Report'.



ACCOUNT ACTIVITY ?

TrisTest Primary...	18/10/21	Paid invoice - ICRA1000032
TrisTest Primary...	18/10/21	Paid invoice - ICRA1000031
TrisTest Primary...	18/10/21	Paid invoice - ICRA1000030
rod Bull	18/10/21	Booked room - 448100
TrisTest Primary...	18/10/21	Paid invoice

VIEW ALL



ACCOUNT ACTIVITY REPORT
Showing 1-4 of 4 activities

Filters ON Date - ASC

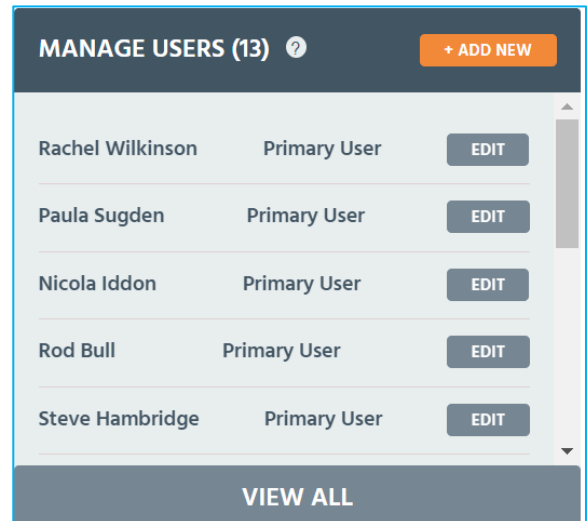
Enter activity details e.g. User N Rod Bull 30th Sep 2021 End date Activity type

User name	Activity type	Date
rod Bull	Paid invoice - IAUD1000002	30/09/2021
rod Bull	Paid invoice - IAUD1000003	01/10/2021
rod Bull	Paid invoice - IFAI1000443	01/10/2021
rod Bull	Added user - Anees Baig	06/10/2021

Showing 1-4 of 4 activities

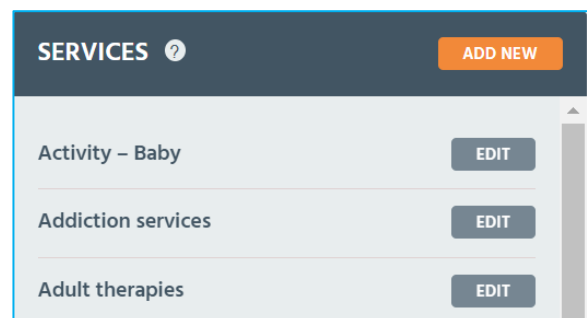
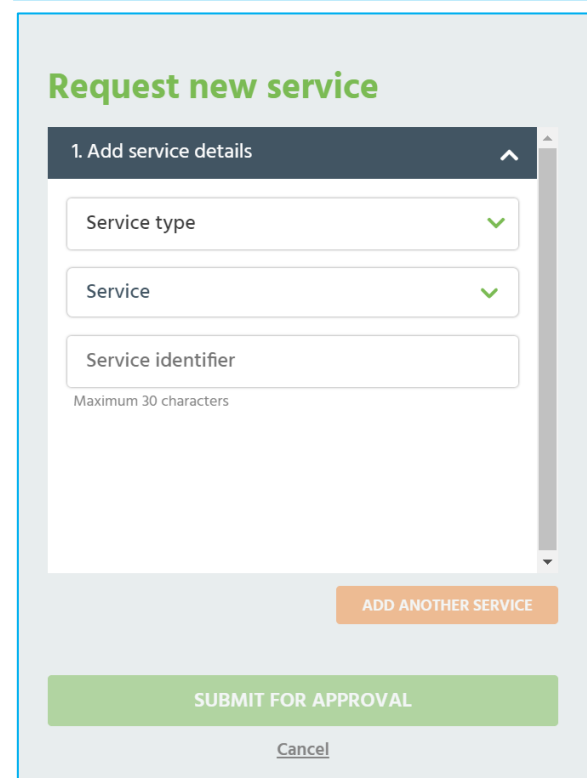
Managing and adding new Users

- You can view, manage and add new users to your NHS Open Space account.
- Further information on this is included in the 'Add and Manage Users' guide.



Managing and adding new Services

- Select **[ADD NEW]** in the top right corner of the Services box.
- Using the Services menu, select from a list of health services.
- Select the **[ADD ANOTHER SERVICE]** button to add as many additional services as you require.
- Select 'Yes' if the service is CCG Commissioned and use the 'CCG Region' field to select the location to be serviced.
- Tick the box if you are licenced to perform the service and input your licencing body and registration number.
- Select the **[SUBMIT FOR APPROVAL]** button.
- It can take up to 48 working hours for your Service to be made live on the system to book against.

Editing a Service

- To edit a service, click on **[EDIT]**.
- Update any of the information that you wish to edit.
- You can edit the name, have a unique identifier, set whether it is a commissioned service or not, input or update the CCG and confirm if the Service is still active.
- Once you have made your changes, click on **[SAVE]**

EDIT

CLOSE ✕

CLIENT SERVICE

Name

Unique identifier

Commissioned?

Ccg name

Active?

 ✓

[Go Back](#)

Payment Management

- You can view, manage and add new Payment Methods to your NHS Open Space account.
- Further information on this is included in the 'Direct Debits' and 'Payment Cards' guides.

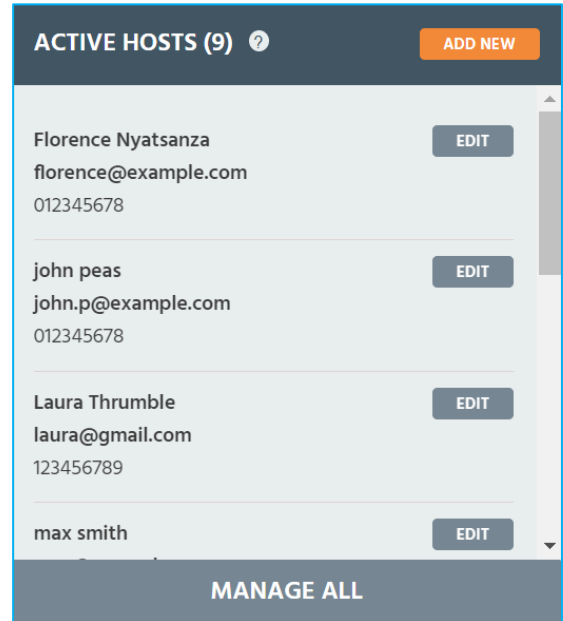
PAYMENT MANAGEMENT ?
ADD NEW

Alcohol Services - Card 5454*****5454 EXP 12/22 nigel nyatsanza Alcohol services	<input style="background-color: #34495e; color: white; padding: 2px 5px;" type="button" value="EDIT"/> <input style="background-color: #34495e; color: white; padding: 2px 5px; margin-left: 5px;" type="button" value="✕"/>
Urology - DD PENDING ? nigel nyatsanza Urology	<input style="background-color: #34495e; color: white; padding: 2px 5px;" type="button" value="EDIT"/> <input style="background-color: #34495e; color: white; padding: 2px 5px; margin-left: 5px;" type="button" value="✕"/>
Activity Baby - Addiction - DD nigel nyatsanza Addiction services	<input style="background-color: #34495e; color: white; padding: 2px 5px;" type="button" value="EDIT"/> <input style="background-color: #34495e; color: white; padding: 2px 5px; margin-left: 5px;" type="button" value="✕"/>

VIEW ALL AND MANAGE

Host Management

- You can view, manage and add new Hosts to your NHS Open Space account
- Select **[ADD NEW]** to add a new host.
- Click on **[EDIT]** to edit an existing host.



- If you are editing or adding a new host you will be asked to input or amend the host names, phone number and e-mail address.
- To remove a host change their status from active to inactive.
- Click on **[ADD NEW HOST]** to add your new host.
- If you are editing a host, select **[UPDATE DETAILS]** to update your hosts information

CLOSE ✕

ADD NEW HOST

Please add details for the host

ADD HOST

CLOSE ✕

HOSTS

Update host details.

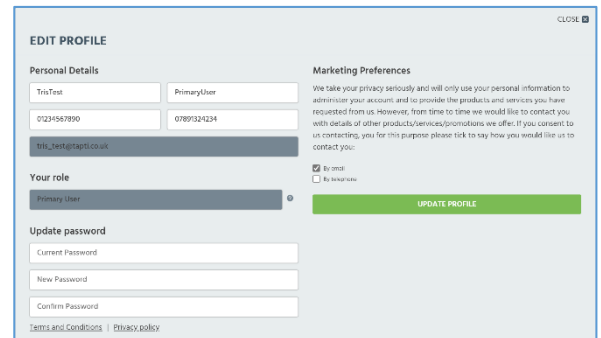
✓

UPDATE DETAILS

[Go Back](#)

Password Management

- To change or update your password,
- Click on **[EDIT PROFILE]** at the top of the Accounts s screen.
- Use this screen to update your name, and phone numbers And update your marketing preferences.
- Input your existing password.
- Type in a new password.
- Confirm your new pasword.
- Click on **[UPDATE PROFILE]**

The screenshot shows the 'EDIT PROFILE' form with the following sections:

- Personal Details:** Includes fields for 'This Test' (with a dropdown menu), 'Primary User', and two phone number fields (01234567890 and 07890123456).
- Your role:** A dropdown menu currently set to 'Primary User'.
- Update password:** Three input fields for 'Current Password', 'New Password', and 'Confirm Password'.
- Marketing Preferences:** A text block explaining privacy, followed by two checkboxes: 'to send' (checked) and 'to receive' (unchecked).
- Buttons:** A green 'UPDATE PROFILE' button is located at the bottom right.
- Footer:** Links for 'Terms and Conditions' and 'Privacy policy' are at the bottom left.