



CSU Collaborative
Partnership of CSUs

CQRS Local

User Guide

Claim User Interface



Document Control

Version History

Revision Date	Version Number	Summary of Changes	Changes Marked
15/05/2023	1.0	Initial Version	
27/07/2023	1.1	Updated for new UI changes	

Reviewed by

This document (or its component) parts have been reviewed by the following:

Name	Title and Organisation	Date	Version
Laura Mansell	NECS	19/05/2023	1.0

Approvals

This document requires the following approvals:

Name	Signature	Title	Date

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Introduction

The CQRS Local claim user interface has been redesigned to give an improved user experience and additional functionality.

The screenshot displays the CQRS Local claim user interface. At the top, there are input fields for 'Creation Date' (01/05/2023 13:00), 'Submission Date', 'Approval Date', 'Status' (Draft), and 'Estimated Total' (£0.00). Below this is a navigation bar with 'Services', 'Components', and 'Claim' tabs. The 'Services' tab is active, showing a list of services with their respective component counts. The 'Components' tab is also visible, showing a list of components with 'Add +' buttons. The 'Claim' tab is active, showing a table with columns for 'Activity Window', 'Status', 'Tariff', 'Units', and 'Estimated Value'. The table contains one row with '2023-2024 - Month 1', 'Draft', '£3.00 Actual Population Per Unit', and '£0.00'. Below the table, there are sections for 'Supporting Attachments' (Evidence Required), 'Actual Population Per Unit Component evidence requirement', and 'Supplementary Information' (Pick a number, Pick a decimal, Pick a word, Pick Yes or No).

Some of the highlights include:

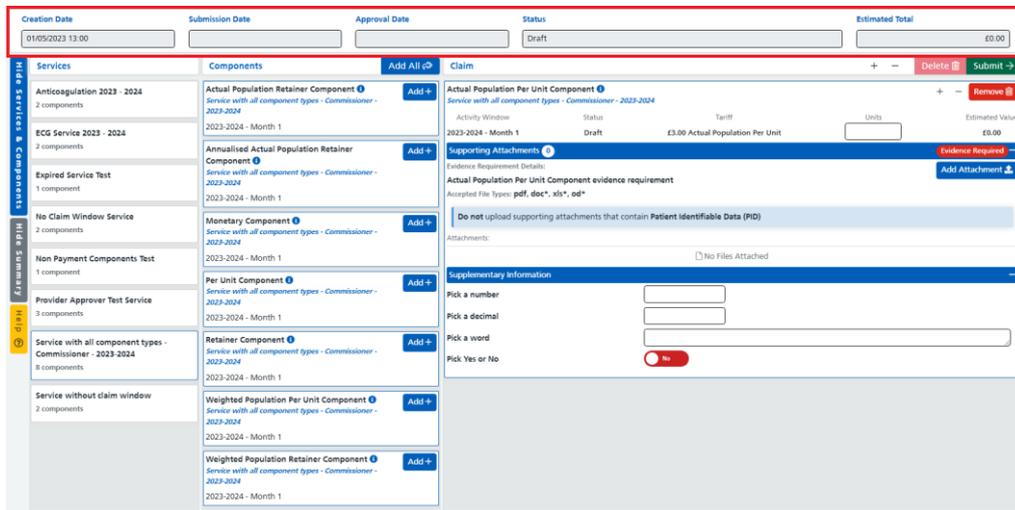
- **Instant Saving** – When completing claim details, the changes are automatically saved so the **Save For Later** button is no longer needed. This also means that if you are away from your computer and get logged out then the claim will be as it was when you left it once you log back in.
- **Supporting Attachments** – documents can now be attached to components even when evidence is not required.
- **Supplementary Information** – commissioners can now attach questions to each component to collect information as part of a claim.

Screen Layout

The claim user interface is split into five main sections, these are:

Claim Summary

The summary is located at the top of the page and contains information about the claim.



Creation Date – The date that the claim was created.

Creation Date

Submission Date – The date that the claim was submitted to the commissioner for approval.

Submission Date

Approval Date – The date that the claim was approved by a Tier 2 commissioner.

Approval Date

Status – The claims status

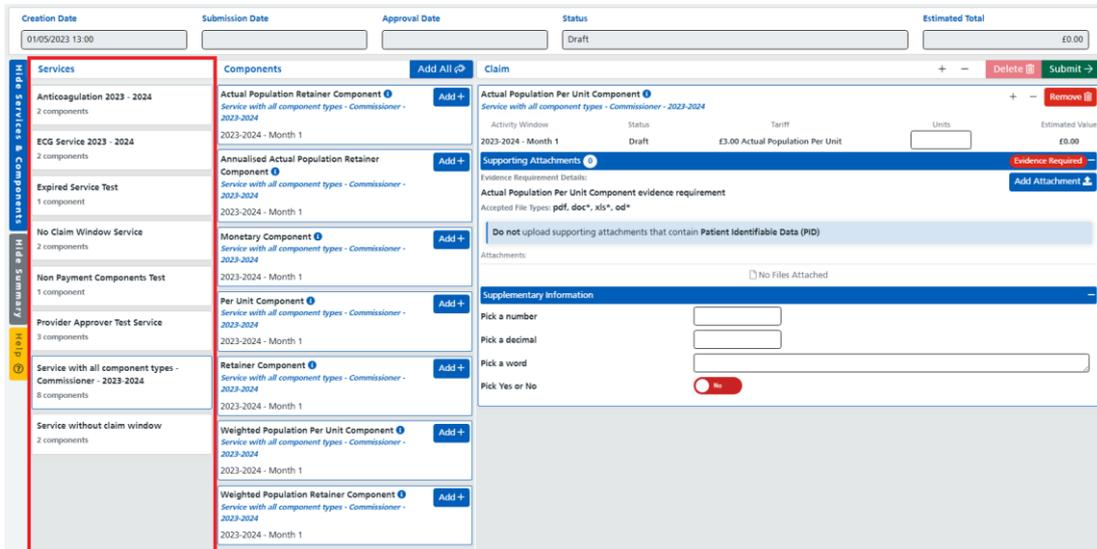
Status

Estimated Total – The total value of the claim i.e. the sum of the component estimated values.

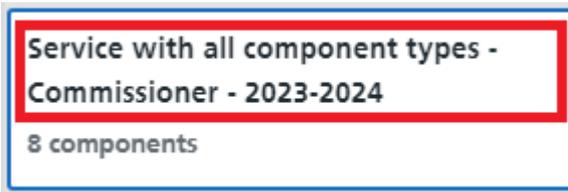
Estimated Total

Services

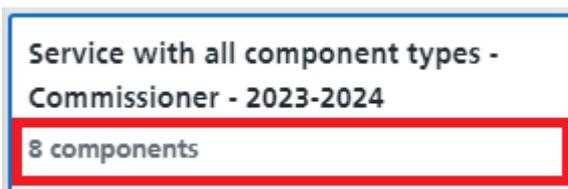
The **Services** section lists the services that are currently available to claim. Each service shows the service name and how many components are part of that service. Clicking on a service will list the components in the components section.



Service Name

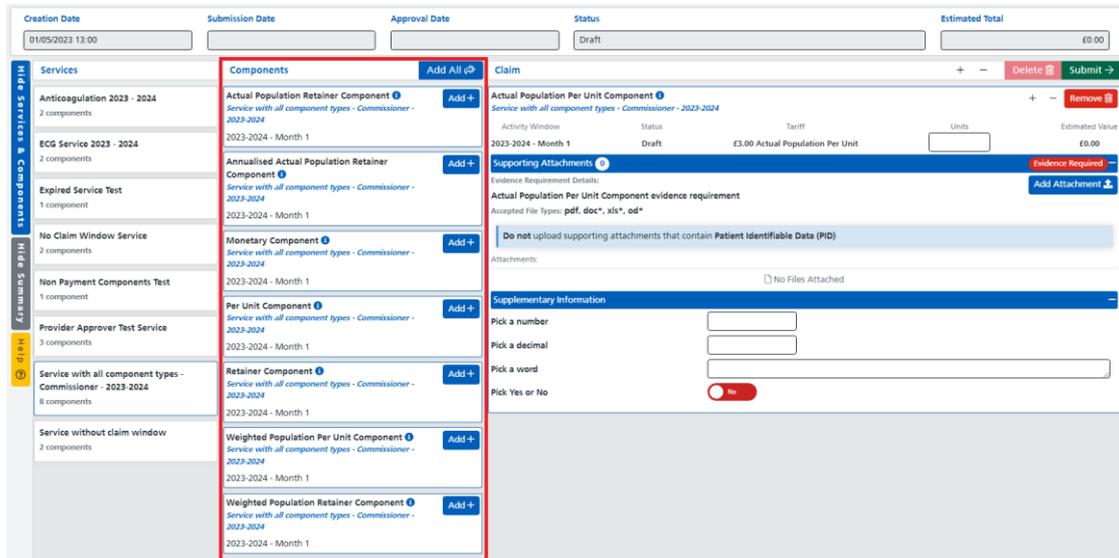


The number of components in the service



Components

This section lists the components for the service selected in the services section and lets you add the components to the claim. You have the option of adding all components, or if you don't want to claim all components, you have the option of adding components individually.



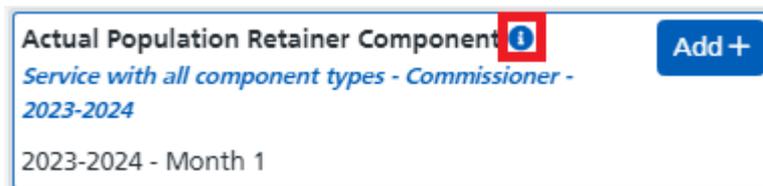
Add All – The add all button will add all components listed in the components section to the claim.



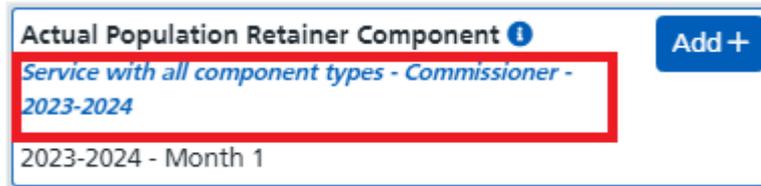
Component Name – This is the name of the component.



Information Icon – Clicking on this will display the component description.

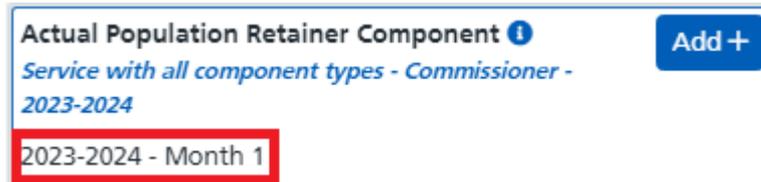


Service – The name of the service that the component belongs to.



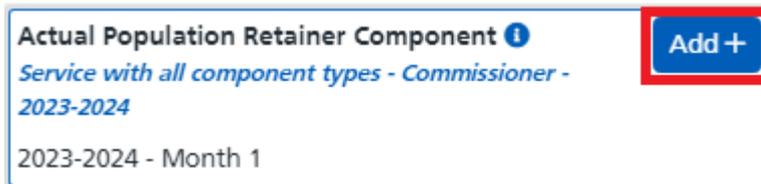
A screenshot of a component card. The card has a blue border and contains the following text: "Actual Population Retainer Component" with an information icon, "Service with all component types - Commissioner - 2023-2024", and "2023-2024 - Month 1". A blue "Add +" button is in the top right corner. A red rectangular box highlights the service name text.

Activity Window – This displays the activity window for the component. Hovering over this with your cursor will display the claim window start and end dates.



A screenshot of a component card. The card has a blue border and contains the following text: "Actual Population Retainer Component" with an information icon, "Service with all component types - Commissioner - 2023-2024", and "2023-2024 - Month 1". A blue "Add +" button is in the top right corner. A red rectangular box highlights the activity window text.

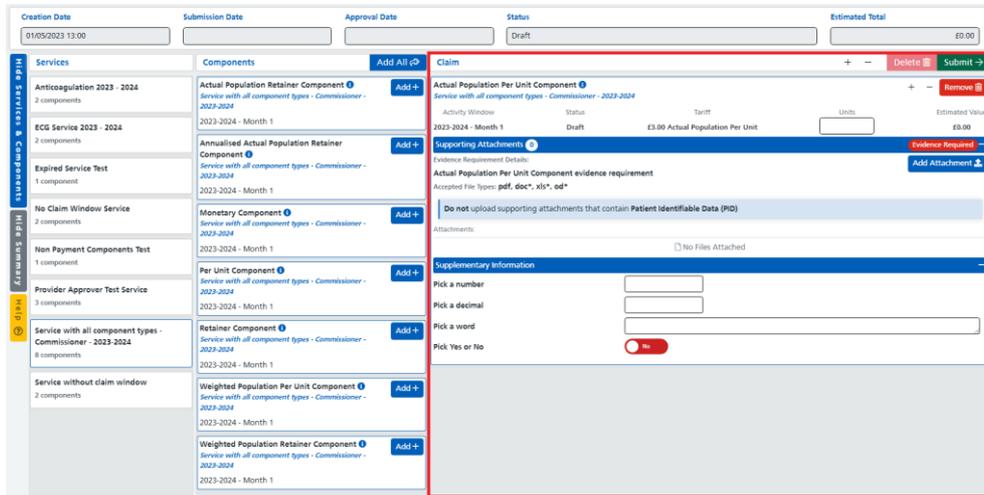
Add Component Button – Clicking this will add the individual component to the claim.



A screenshot of a component card. The card has a blue border and contains the following text: "Actual Population Retainer Component" with an information icon, "Service with all component types - Commissioner - 2023-2024", and "2023-2024 - Month 1". A blue "Add +" button is in the top right corner. A red rectangular box highlights the "Add +" button.

Claim

The claim section contains the components that have been added to the claim and is what will be submitted for approval. This section is where you complete the details of the claim such as unit values, add attachments, and if required, complete supplementary information.



Submit Button – clicking this button will validate the claim and submit it for approval.



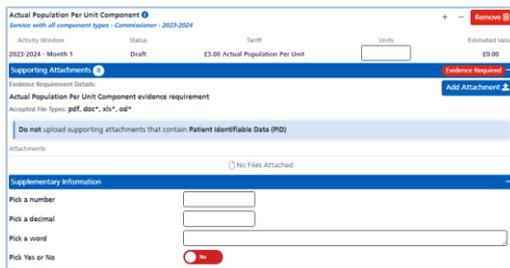
Delete Button – This lets you delete a claim. A claim can only be deleted once all components have been removed.



Expand (+) / Collapse (-) – The expand and collapse buttons let you expand all or collapse all components.



Expanded



Collapsed



Claim Component

The following image is an example of a component added to a claim and shows the different parts that need to be completed before submitting the claim.

The screenshot shows a 'Monetary Component' form with the following sections:

- Header:** 'Monetary Component' with an information icon, a '+' and '-' icon, and a 'Remove' button.
- Service Name:** 'Service with all component types - Commissioner - 2023-2024'.
- Table:**

Activity Window	Status	Tariff	Value	Estimated Value
2023-2024 - Month 1	Draft	Monetary	£ <input type="text"/>	£0.00
- Supporting Attachments:** A blue bar with 'Supporting Attachments' and a '-' icon. Below it, 'Accepted File Types: pdf, doc*, xls*, od*' and an 'Add Attachment' button.
- Warning:** A light blue box stating 'Do not upload supporting attachments that contain Patient Identifiable Data (PID)'.
- Attachments:** A section with 'Attachments:' and 'No Files Attached'.
- Supplementary Information:** A blue bar with 'Supplementary Information' and a '-' icon. Below it, three input fields: 'Pick a number between 1 and 100', 'Pick a decimal between 1 and 50', and 'Enter a random word'. A radio button labeled 'No' is selected for 'Is everything done?'.
- Errors:** A red bar with 'Errors' and a '-' icon. Below it, three error messages:
 - Unit value is invalid
 - No supplementary information value supplied for 'Pick a number between 1 and 100'
 - No supplementary information value supplied for 'Pick a decimal between 1 and 50'
 - No supplementary information value supplied for 'Enter a random word'

An explanation of the different parts of the claim component is as follows:

Delete Button – The delete button lets you remove a component from the claim. Once removed it will appear back in the components list. Please note: any details entered, or files attached to that component will be lost when the component is removed from the claim.

This screenshot highlights the 'Remove' button in the top right corner of the 'Monetary Component' form.

Component Name – This is the name of the component. Clicking on the information icon to the right of the component name will show the component description.

This screenshot highlights the information icon (i) next to the 'Monetary Component' title.

Service Name – The name of the service that the component is from

This screenshot highlights the service name 'Service with all component types - Commissioner - 2023-2024' in the header of the 'Monetary Component' form.

Activity Window – This displays the activity window for the component. Hovering over this with your cursor will display the claim window start and end dates.

Monetary Component 1					+ - Remove	
Service with all component types - Commissioner - 2023-2024						
Activity Window	Status	Tariff	Value	Estimated Value		
2023-2024 - Month 1	Draft	Monetary	£ <input type="text"/>	£0.00		

Status – This displays the components status. Generally, this will show as **Draft** unless the claim has been rejected then the component status could be either approved or declined.

Monetary Component 1					+ - Remove	
Service with all component types - Commissioner - 2023-2024						
Activity Window	Status	Tariff	Value	Estimated Value		
2023-2024 - Month 1	Draft	Monetary	£ <input type="text"/>	£0.00		

Tariff – The tariff shows the tariff type or amount per unit.

Monetary Component 1					+ - Remove	
Service with all component types - Commissioner - 2023-2024						
Activity Window	Status	Tariff	Value	Estimated Value		
2023-2024 - Month 1	Draft	Monetary	£ <input type="text"/>	£0.00		

Value/Units – This is where you enter the number of units or the monetary value. Some components don't require a value to be entered in which case this would not be visible.

Monetary Component 1					+ - Remove	
Service with all component types - Commissioner - 2023-2024						
Activity Window	Status	Tariff	Value	Estimated Value		
2023-2024 - Month 1	Draft	Monetary	£ <input type="text"/>	£0.00		

Estimated Value – This shows the estimated value of the component.

Monetary Component 1					+ - Remove	
Service with all component types - Commissioner - 2023-2024						
Activity Window	Status	Tariff	Value	Estimated Value		
2023-2024 - Month 1	Draft	Monetary	£ <input type="text"/>	£0.00		

Supporting Attachments – The supporting attachments section details any evidence requirements and lets you add/manage files that you are attaching to the claim component.

Supporting Attachments 1 Evidence Required

Evidence Requirement Details: Add Attachment

Actual Population Per Unit Component evidence requirement

Accepted File Types: pdf, doc*, xls*, od*

Do not upload supporting attachments that contain Patient Identifiable Data (PID)

Attachments:

TestFile1.pdf	Download	Delete
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- **Attachment Count** – The section header displays a count of how many attachments have been added to the component.

Supporting Attachment 1 Evidence Required

- **Evidence Required Indicator** – If the component has a mandatory evidence requirement there will be an indicator like the one shown below.



- **Evidence Details** – Details any evidence requirements and the allowed file types that can be attached.

Evidence Requirement Details:
Actual Population Per Unit Component evidence requirement
 Accepted File Types: pdf, doc*, xls*, od*

- **Add Attachment Button** – Clicking this lets you select and add a file to the claim component.



- **Attachments List** – The list of attachments that have been added to the component.



- **Download Button** – The download button lets you download a copy of the file attached to the component.



- **Delete Button** – This lets you delete a file from a component.



Supplementary Information – This section details any questions that need completing as part of the claim submission. The responses can either require a whole number value, decimal value, text value, or a Yes/No value. This section will only be visible if the commissioner has added supplementary information questions to the component.

Supplementary Information

Enter a number

Enter a decimal

Enter some text

Pick Yes or No No

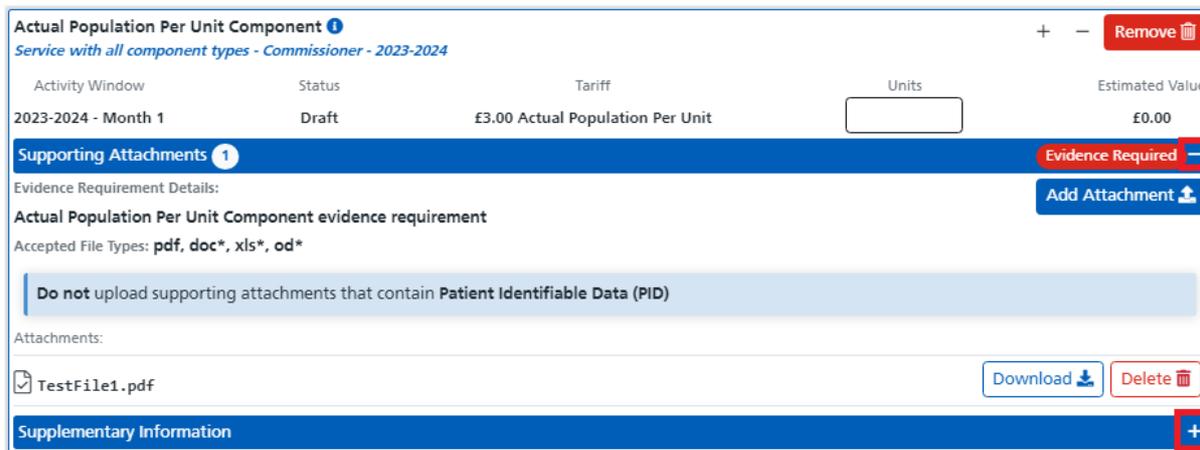
Decline History – When a claim/component is rejected the approver will enter a reason for the rejection. The decline history section of a component will display these reasons.



Errors – This section will only be visible if you have tried to submit a claim and it has failed validation. Once displayed it will list any issues with the component you are trying to submit.

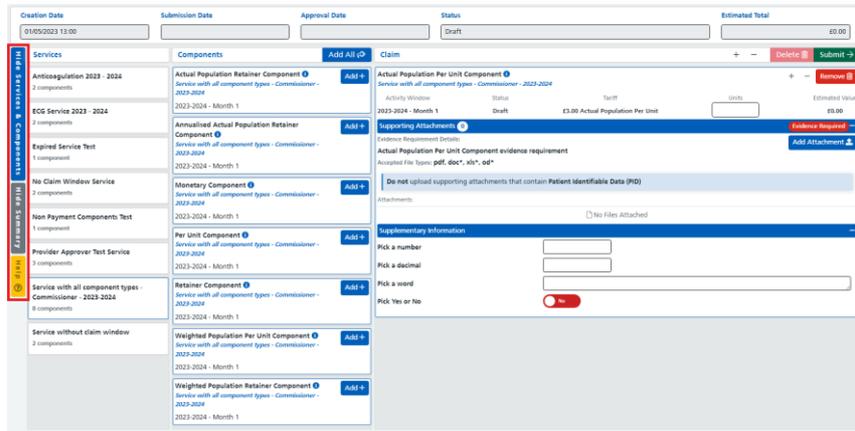


Expand / Collapse – To the right-hand side of the component sections you will see a + or – that lets you **Expand** or **Collapse** the section. In the image below you can see that the Supplementary Information section is collapsed, and Supporting Attachments and Decline History are expanded.



Control Sidebar

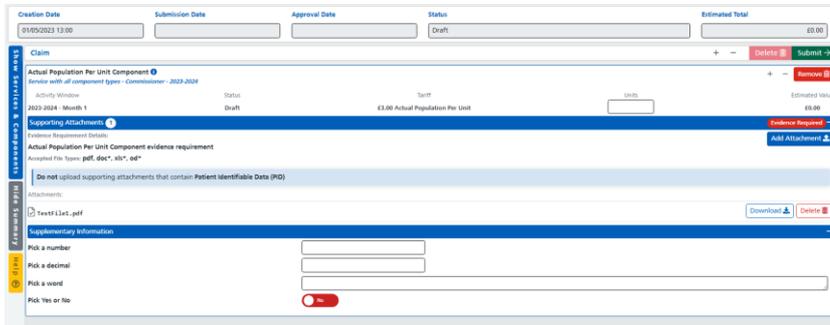
To the left of the screen, you will see the control sidebar containing buttons that let you control parts of the claim user interface.



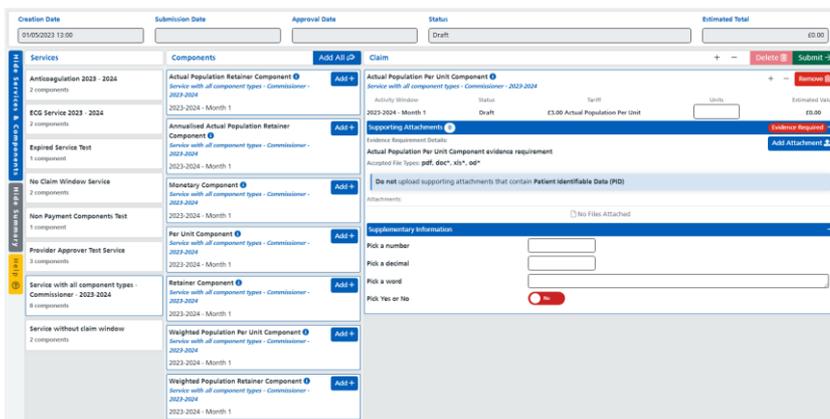
Hide Services & Component – Clicking this will toggle the visibility of the Services and Components lists. Once you have added the required components to the claim then clicking this will give more screen space for completing the claim component details.



Hidden



Shown



Hide Summary – Clicking this will toggle the visibility of the claim summary section giving more space on screen for completing the claim details.



Hidden

Note that the claim status and value appear on the Claim section header when the summary is hidden.



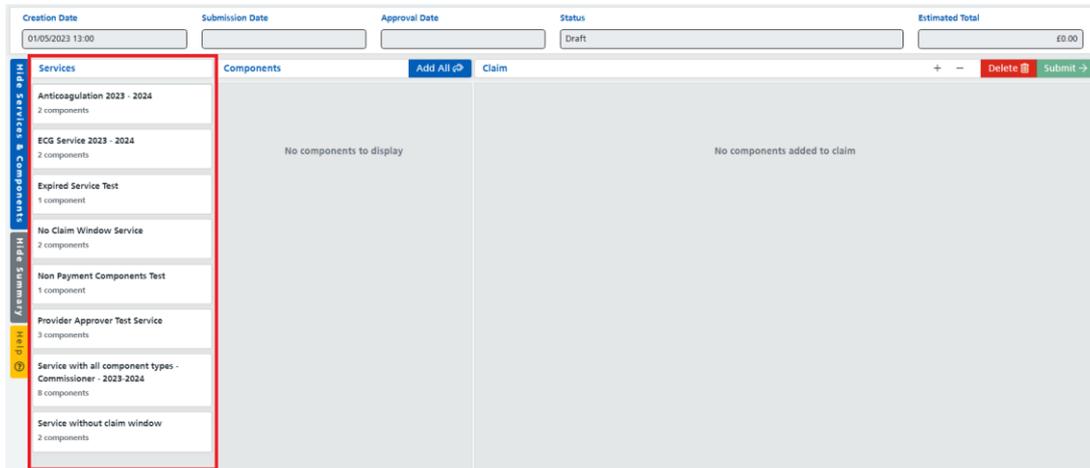
Shown

Help – Opens a copy of this document in a new window.

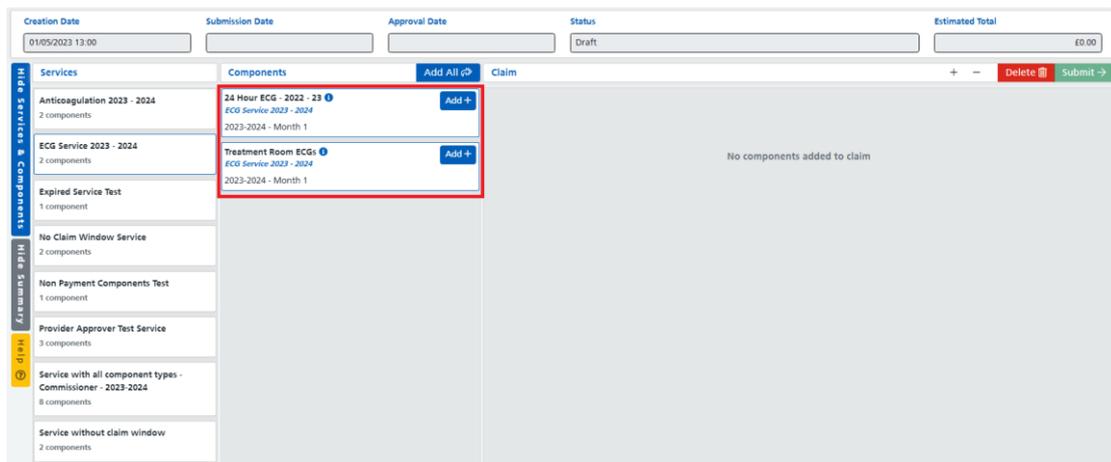


Adding Components

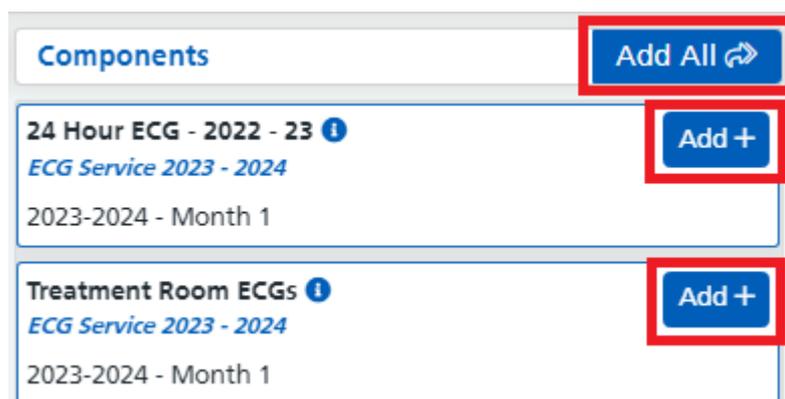
To add a component to a claim, first click on the service you want to claim in the **Services** list.



This will display a list of available components attached to that service.



To add a component to a claim you can either click the **Add All** button to add all components to the claim, or you can use the **Add +** button to add an individual component to the claim.



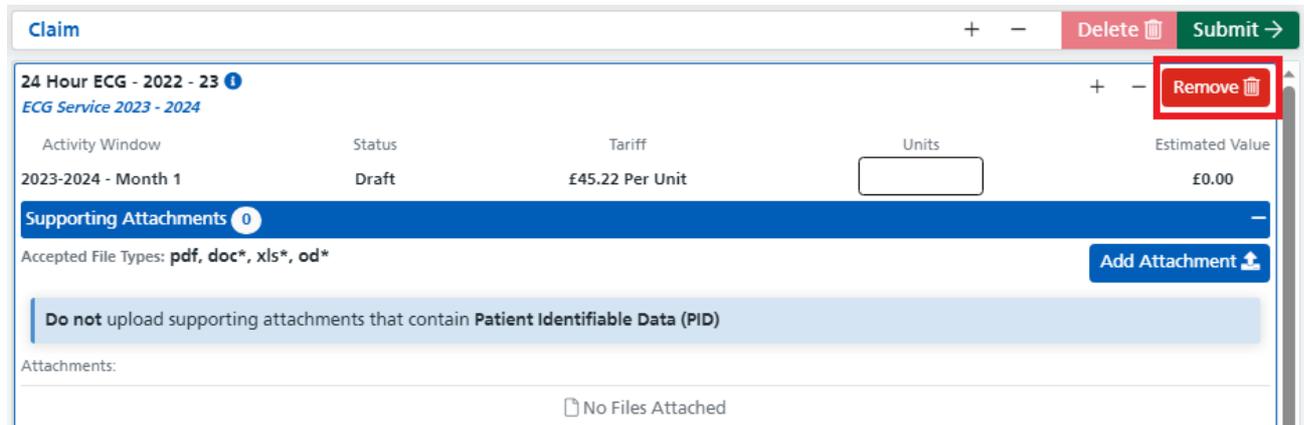
Once you have clicked **Add All** or the **Add +** button you will see a message at the top of the screen saying the component(s) have been added to the claim and the components will move to the claim section.

The screenshot displays the NHS CQRS Local interface for a claim with ID 2433. At the top, a green box highlights two success messages: "24 Hour ECG - 2022 - 23 added to claim" and "Treatment Room ECGs added to claim". The interface includes a navigation bar with "Services", "Claims", and "Reporting" options. Below the navigation, there are input fields for "Creation Date" (01/05/2023 13:00), "Submission Date", "Approval Date", "Status" (Draft), and "Estimated Total" (£0.00). The main content area is divided into "Services" and "Components" sections. The "Services" section lists various services like "Anticoagulation 2023 - 2024", "ECG Service 2023 - 2024", "Expired Service Test", "No Claim Window Service", "Non Payment Components Test", "Provider Approver Test Service", "Service with all component types - Commissioner - 2023-2024", and "Service without claim window". The "Components" section shows "No components to display". The "Claim" section, highlighted with a red box, contains details for two components: "24 Hour ECG - 2022 - 23" and "Treatment Room ECGs". Each component entry includes a table with columns for "Activity Window", "Status", "Tariff", "Units", and "Estimated Value". Below each component, there are sections for "Supporting Attachments" (with a warning not to upload Patient Identifiable Data) and "Supplementary Information" (with fields for "Advice given", "Further advice from consultant", "Normal outcome", "Referred to Cardiology", and "Other").

Removing Components

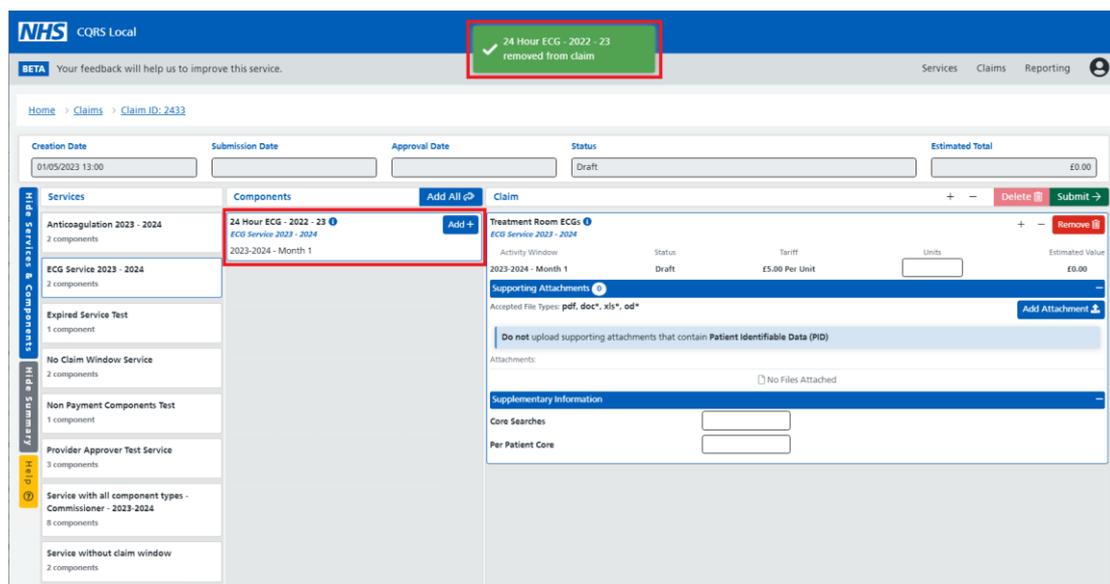
To remove a component from a claim, click the **Remove** icon on the claim component that you want to remove.

Please note: If you remove a component from the claim, any changes or attachments you have added to that component will be deleted.



When you click the delete icon you will see a message saying that the component has been removed from the claim. The component will then appear in the list of components.

Please note: If a different service is selected in the services list, the removed component will not be visible. To view the removed component simply click on the correct service in the services list.



If you want to remove all components from the claim just repeat this process until they are all removed.

Completing Claim Details

Once a component has been added to a claim it is straightforward to complete the details.

First, enter the number of units or monetary value you wish to claim.

24 Hour ECG - 2022 - 23				+	-	Remove
ECG Service 2023 - 2024						
Activity Window	Status	Tariff	Units			Estimated Value
2023-2024 - Month 1	Draft	£45.22 Per Unit	<input type="text"/>			£0.00

Please note: This field may not be visible as some components are based on population so don't require a value to be entered.

Once the monetary value/units have been entered, press **enter**, or **tab**, and you will see a message saying that the value has been **saved** and the **Estimated Value** on both the component and the claim will be calculated.

The screenshot shows the CQRS Local interface with a green 'Saved' notification at the top. Below it, a table displays claim details:

Creation Date	Submission Date	Approval Date	Status	Estimated Total
01/05/2023 13:00			Draft	£226.10

The 'Components' section lists several items, including '24 Hour ECG - 2022 - 23' with a status of 'Draft' and an estimated value of '£226.10'. The 'Units' field for this component is highlighted with a red box and contains the value '5'.

Next is the Supporting Attachments section. This section is optional unless it states that there is an evidence requirement. A mandatory evidence requirement can be identified by the **Evidence Required** badge and the **Evidence Requirement Details** as shown below.

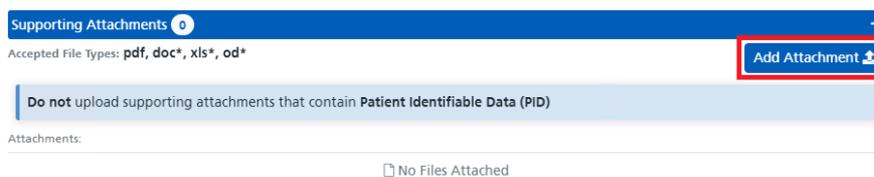
Evidence is required.

The screenshot shows the 'Supporting Attachments' section with a badge indicating 'Evidence Required'. Below the badge, there is a link for 'Evidence Requirement Details' and an 'Add Attachment' button. A warning message states: 'Do not upload supporting attachments that contain Patient Identifiable Data (PID)'. Accepted file types are listed as 'pdf, xls*'.

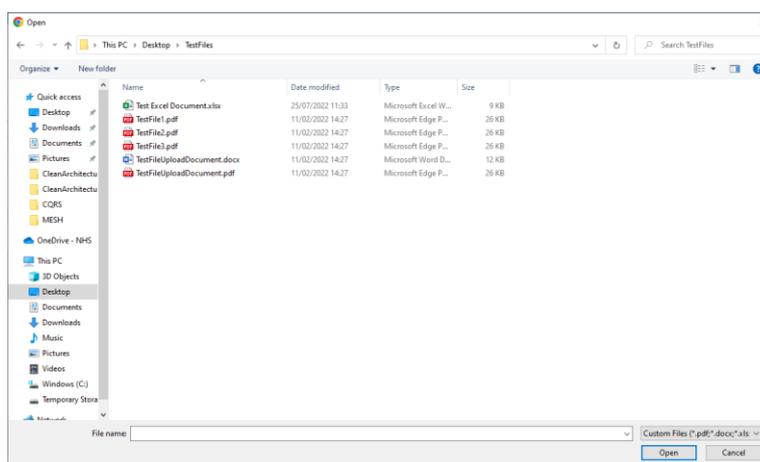
Evidence is optional.

The screenshot shows the 'Supporting Attachments' section with a badge indicating 'Evidence Required'. Below the badge, there is an 'Add Attachment' button. A warning message states: 'Do not upload supporting attachments that contain Patient Identifiable Data (PID)'. Accepted file types are listed as 'pdf, doc*, xls*, od*'.

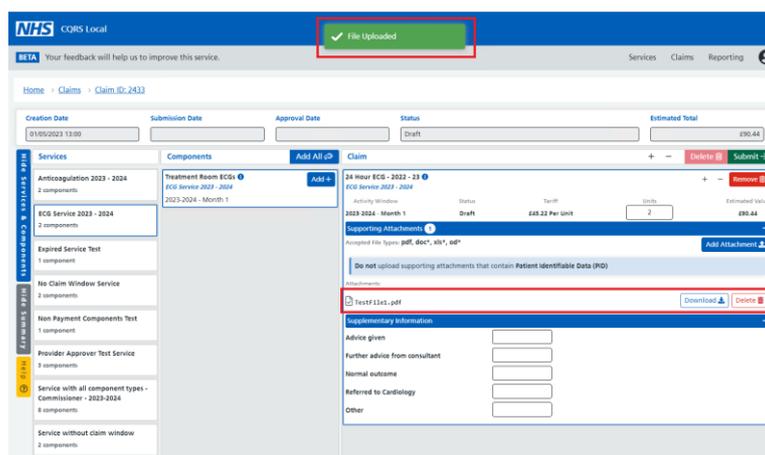
To add evidence, click on the **Add Attachment** button on the top right-hand corner of the **Supporting Attachments** section.



This will display a file dialog window letting you choose a file you want to add. Select the file you want to add then click the **Open** button.



You will now see a message saying that the file has been uploaded, and you will also notice the file appear in the attachments list.

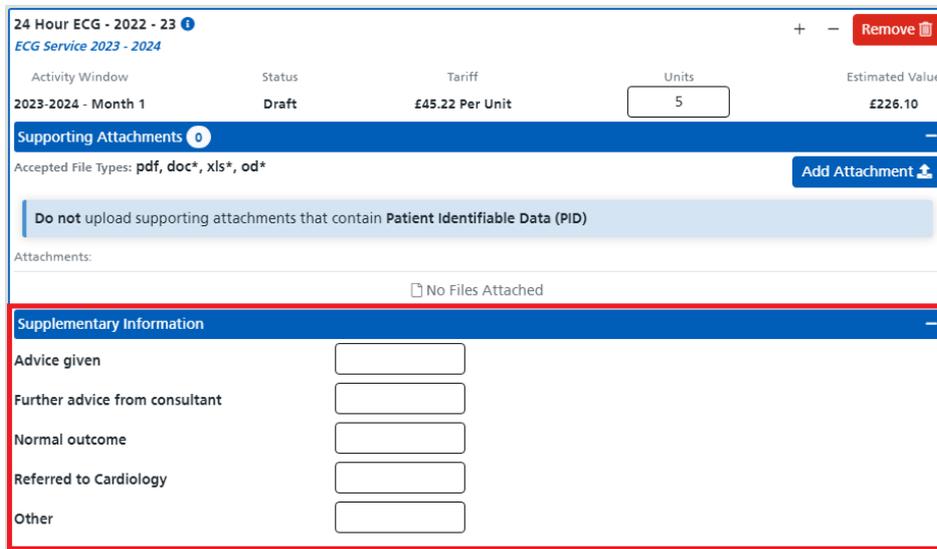


If you need to remove a file, click on the corresponding delete button for that file.



The next section to complete is the **Supplementary Information** section. This section can contain any number of items and will require either a whole **number**, **decimal**, **text**, or **yes / no** response.

Please note: This section will only be visible if the commissioner has specified that they need extra information when claiming the component.



24 Hour ECG - 2022 - 23 Remove

ECG Service 2023 - 2024

Activity Window	Status	Tariff	Units	Estimated Value
2023-2024 - Month 1	Draft	£45.22 Per Unit	5	£226.10

Supporting Attachments 0

Accepted File Types: pdf, doc*, xls*, od* Add Attachment

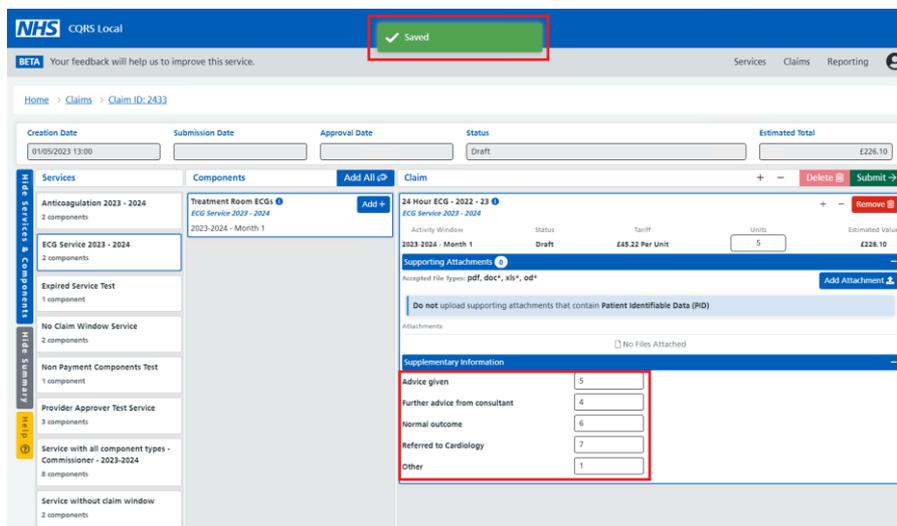
Do not upload supporting attachments that contain Patient Identifiable Data (PID)

Attachments: No Files Attached

Supplementary Information

Advice given	<input type="text" value="5"/>
Further advice from consultant	<input type="text" value="4"/>
Normal outcome	<input type="text" value="6"/>
Referred to Cardiology	<input type="text" value="7"/>
Other	<input type="text" value="1"/>

Enter the required values pressing **tab** or **using the mouse** to move between them. Each time a value has been entered and the field has lost focus you will see a **Saved** message indicating that the value has been saved to the claim.



NHS CQRS Local ✓ Saved

BETA Your feedback will help us to improve this service. Services Claims Reporting

Home > Claims > Claim ID: 2433

Creation Date	Submission Date	Approval Date	Status	Estimated Total
01/05/2023 13:00			Draft	£226.10

Services Add All Claim Delete Submit

Services	Components	Claim
Anticoagulation 2023 - 2024 2 components	Treatment Room ECGs ECG Service 2023 - 2024 2023-2024 - Month 1	24 Hour ECG - 2022 - 23 ECG Service 2023 - 2024 2023-2024 - Month 1 Draft £45.22 Per Unit 5 £226.10
ECG Service 2023 - 2024 2 components		
Expired Service Test 1 component		
No Claim Window Service 2 components		
Non Payment Components Test 1 component		
Provider Approver Test Service 3 components		
Service with all component types - Commissioner - 2023-2024 8 components		
Service without claim window 2 components		

Supporting Attachments 0

Accepted File Types: pdf, doc*, xls*, od* Add Attachment

Do not upload supporting attachments that contain Patient Identifiable Data (PID)

Attachments: No Files Attached

Supplementary Information

Advice given	<input type="text" value="5"/>
Further advice from consultant	<input type="text" value="4"/>
Normal outcome	<input type="text" value="6"/>
Referred to Cardiology	<input type="text" value="7"/>
Other	<input type="text" value="1"/>

Please note: All supplementary information values are mandatory so a value must be entered for all items before the claim can be submitted.

Submitting a claim

Once all component details in the claim section are completed, you can submit the claim by clicking on the **Submit** button at the top right-hand corner of the claim section.

The screenshot shows a web interface for submitting a claim. At the top, there are fields for 'Status' (set to 'Draft') and 'Estimated Total' (£226.10). Below these is a 'Claim' section with a red 'Submit' button and a 'Delete' button. A table below the claim section lists components with columns for 'Activity Window', 'Status', 'Tariff', 'Units', and 'Estimated Value'. The first row shows '24 Hour ECG - 2022 - 23' with a status of 'Draft' and an estimated value of £226.10.

Once the submit button has been clicked, you will see a confirmation dialog asking you to confirm that you want to submit the claim.

The screenshot shows the same claim submission interface as above, but with a 'Submit Claim' dialog box overlaid. The dialog box contains a question mark icon and the text 'Are you sure you want to submit this claim?'. There are 'Yes' and 'Cancel' buttons at the bottom of the dialog. The background interface is dimmed, showing the same claim details and component list.

When you click **Yes**, the claim will be validated, and if it passes validation, it will be submitted for approval.

If it fails validation, you will see a message saying that the validation has failed, and the issues will be displayed in the **Errors** List of each component.

Errors List

The **Errors** list shows any validation errors that have occurred during a claim submission. Each row explains what has failed and should be enough information to help you correct the issues.

24 Hour ECG - 2022 - 23 !
Remove

ECG Service 2023 - 2024

Activity Window	Status	Tariff	Units	Estimated Value
2023-2024 - Month 1	Draft	£45.22 Per Unit	<input type="text"/>	£0.00

Supporting Attachments -

Accepted File Types: pdf, doc*, xls*, od* Add Attachment

Do not upload supporting attachments that contain Patient Identifiable Data (PID)

Attachments: No Files Attached

Supplementary Information -

Advice given	<input type="text"/>
Further advice from consultant	<input type="text"/>
Normal outcome	<input type="text"/>
Referred to Cardiology	<input type="text"/>
Other	<input type="text"/>

Errors

- Unit value is invalid
- No supplementary information value supplied for 'Advice given'
- No supplementary information value supplied for 'Further advice from consultant'
- No supplementary information value supplied for 'Normal outcome'
- No supplementary information value supplied for 'Referred to Cardiology'
- No supplementary information value supplied for 'Other'

Once you have corrected the issues, click the **Submit** button and the claim will be re-validated and submitted.

✔ Claim Submitted

BETA Your feedback will help us to improve this service. Services Claims Reporting

Home > Claims > Claim ID: 2425

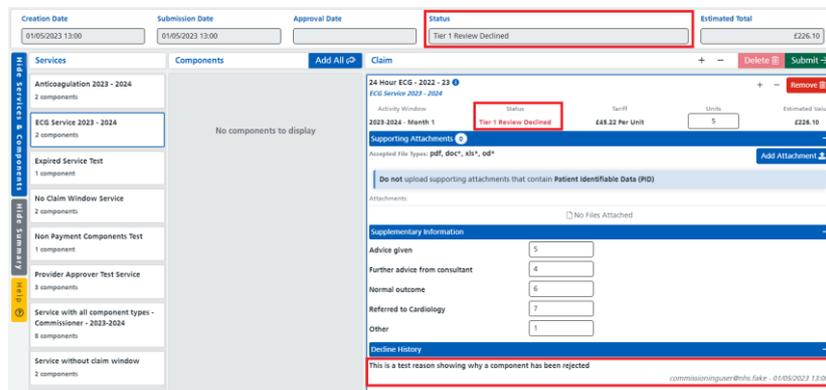
Creation Date	Created By	Submission Date	Approval Date	Status	Estimated Total
01/05/2023	Provider User (provideruser@nhs.fake)			Pending System Review	£276.10

Claim Components

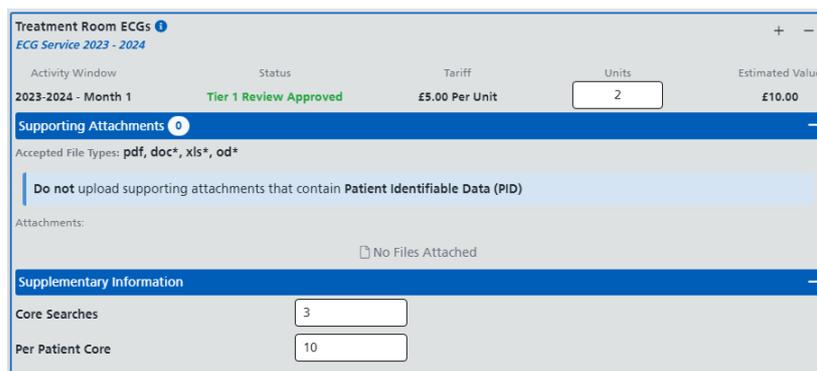
Component	Activity Window	Status	Tariff	Units / Monetary Value	Estimated Value
24 Hour ECG - 2022 - 23 ! ECG Service 2023 - 2024	2023-2024 - Month 1	Pending System Review	£45.22 Per Unit	5	£226.10
Treatment Room ECGs ! ECG Service 2023 - 2024	2023-2024 - Month 1	System Approved	£5.00 Per Unit	10	£50.00

Rejected Claims

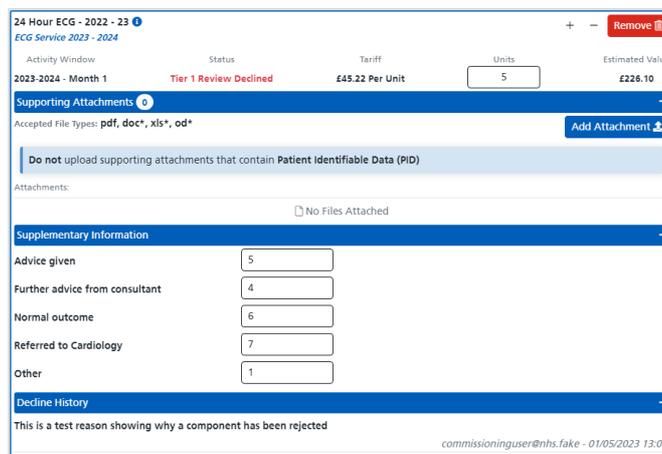
When you **Edit** a rejected claim, you will see that the **Claim Status** is set to **Declined**, and at least one component will have a status of **Declined** and display the reason it was declined in the **Decline History**.



Approved components will be greyed out and read only so you will not be able to make changes to them.



Rejected components will be fully editable so you can correct any issues described in the **Decline History**.



Correct the issues and re-submit the claim.

Expired Components

Components can sometimes be expired by the commissioner and can no longer be claimed. If an expired component is already part of a Draft claim it can be identified by the **Expired** text as shown below.

The screenshot shows a form for 'Expired Component 01'. At the top right, there is a red stamp that says 'EXPIRED'. The form includes fields for 'Activity Window' (2023-2024 - Month 1), 'Status' (Draft), 'Units' (empty), and 'Estimated Value' (£0.00). Below these are sections for 'Supporting Attachments', 'Supplementary Information', and a 'Yes / No supplementary information' radio button set with 'No' selected.

Expired components need to be removed from the claim by clicking the **Remove** button in the top right-hand corner of the component.

This is a duplicate of the first screenshot, showing the 'Expired Component 01' form with the 'EXPIRED' stamp and the 'Remove' button in the top right corner.

If you try to submit a claim containing an expired component, you will receive a validation failure error saying that the component can no longer be claimed and it must be removed from the claim.

This screenshot shows the 'Expired Component 01' form with the 'EXPIRED' stamp. The 'Units' field is now filled with '1' and the 'Estimated Value' is £1.00. The 'Yes / No supplementary information' radio button set has 'Yes' selected. At the bottom, a red error box contains the text: 'Please remove this component as it has expired and can no longer be claimed'.

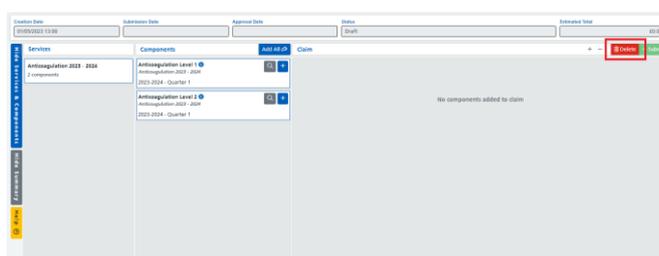
Deleting Claims

You can delete a claim but only when all components have been removed, and only when the claim is in **Draft** or a **Declined** status.

To delete a claim, first remove the components from the claim by clicking the remove button on each component in the claim section.

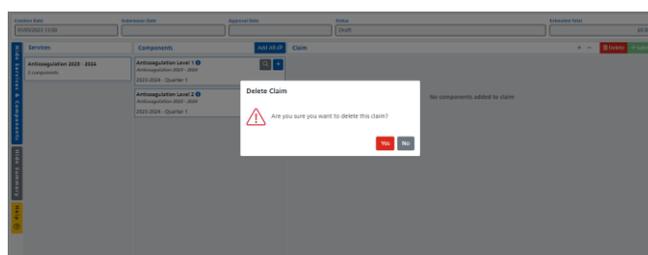


Once all components have been removed, click the **Delete** button at the top right-hand corner of the **Claim Section**.



Please note: The delete button will only be enabled once all components are removed from the claim section, and when the claim is in Draft or a Declined status.

You will now see a confirmation dialog asking you to confirm that you want to delete the claim.



Click **Yes** and the claim will be deleted.

