

# CS R4+

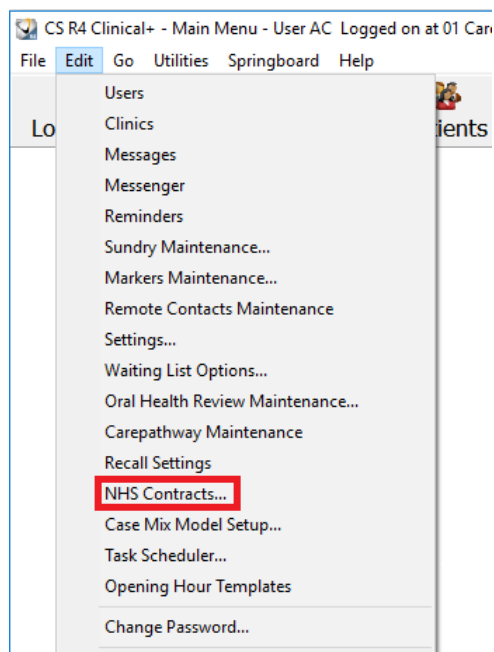
## How to Extend Your NHS Contract (England, Wales & IoM only)

This 7-page handout is aimed at system administrators and shows how to enable the automatic extension option for the active NHS contract or how to manually extend the active NHS contracts in CS R4+ practice management software.

### Automatically Extending the NHS Contract

With the release of v8.1.3, the option to automatically extend the NHS Contract was added to CS R4+. If you wish to enable this option, then:

- 1 From the **Main screen**, click **Edit** and click **NHS Contracts**. The **NHS Contracts** window is displayed.

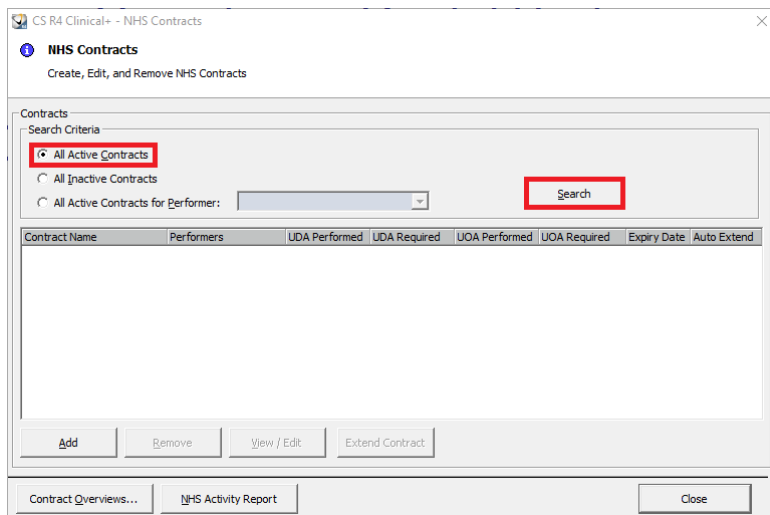


Handout

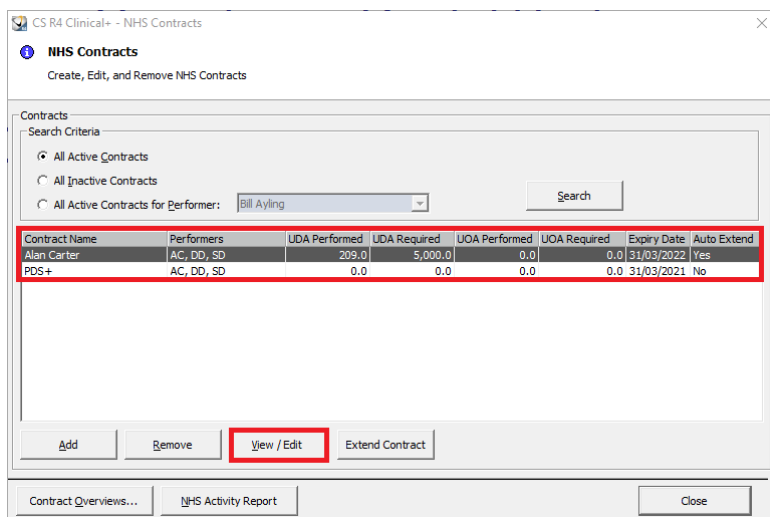


## How to Extend Your NHS Contract (England, Wales & IoM only)

- 2 Select **All Active Contracts** and click **Search** to display all currently active contracts.



- 3 Select the required active contract and click **View/Edit**. The **NHS Contract Maintenance** window is displayed.



## How to Extend Your NHS Contract (England, Wales & IoM only)

- 4 Place a tick against **Auto Extend** and click **OK**. The **NHS Contracts** window is displayed.

CS R4 Clinical+ - NHS Contract Maintenance

**NHS Contract**  
View, Edit, and maintain your NHS Contracts.

Contract Number: 1234560001  
Contract Name: Alan Carter  
Owner: Alan Carter  
Auto Extend:  PDS+:

Contract Period: 01/04/2020 to 31/03/2021  
Contracted Activity this Period: UDA: 5,000.0 UOA: 0.0

Performer	UDA	Monthly Targets												Total		
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar			
AC	Targeted	0.0	200.0	190.0	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.7	1,666.7...
	Performed	200.0	3.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	206.0
	Difference	0.0	-197.0	-189.0	-150.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.7	-1,460.7
DD	Targeted	0.0	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.7	1,666.7
	Performed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Difference	0.0	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.7	-1,666.7
SD	Targeted	0.0	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.5	151.6	1,666.6
	Performed	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	3.0
	Difference	0.0	-151.5	-151.5	-151.5	-151.5	-151.5	-148.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.5	-151.6	-1,663.6
Totals	Targeted	0.0	454.5	454.5	454.5	454.5	454.5	454.5	454.5	454.5	454.5	454.5	454.5	455.0	5,000.0	
	Performed	200.0	3.0	1.0	1.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	209.0		
	Difference	200.0	-451.5	-453.5	-453.5	-454.5	-454.5	-451.5	-454.5	-454.5	-454.5	-454.5	-455.0	-4,791.0		

Buttons: Add Performer, Remove Performer, Set Default, Adjustments, Print, OK, Cancel

- 5 Click **Close**.

CS R4 Clinical+ - NHS Contracts

**NHS Contracts**  
Create, Edit, and Remove NHS Contracts

Search Criteria:  
 All Active Contracts  
 All Inactive Contracts  
 All Active Contracts for Performer: Bill Ayling [Search]

Contract Name	Performers	UDA Performed	UDA Required	UOA Performed	UOA Required	Expiry Date	Auto Extend
Alan Carter	AC, DD, SD	209.0	5,000.0	0.0	0.0	31/03/2022	Yes
PDS+	AC, DD, SD	0.0	0.0	0.0	0.0	31/03/2021	No

Buttons: Add, Remove, View / Edit, Extend Contract, Contract Overview..., NHS Activity Report, Close

## How to Extend Your NHS Contract (England, Wales & IoM only)

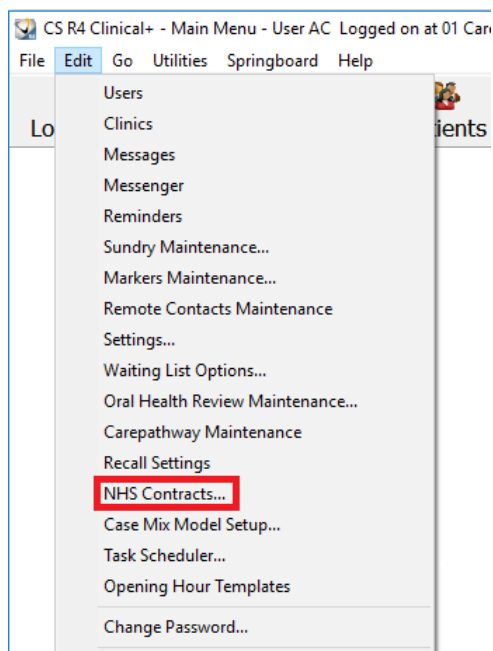
- 6 Once this option has been enabled for a contract it will automatically extend this contract every year.
- 7 Repeat the above for each active contract as required.



**Note:** A warning message will still be displayed in the 28 days leading up to the Period End to allow for manual extension if required

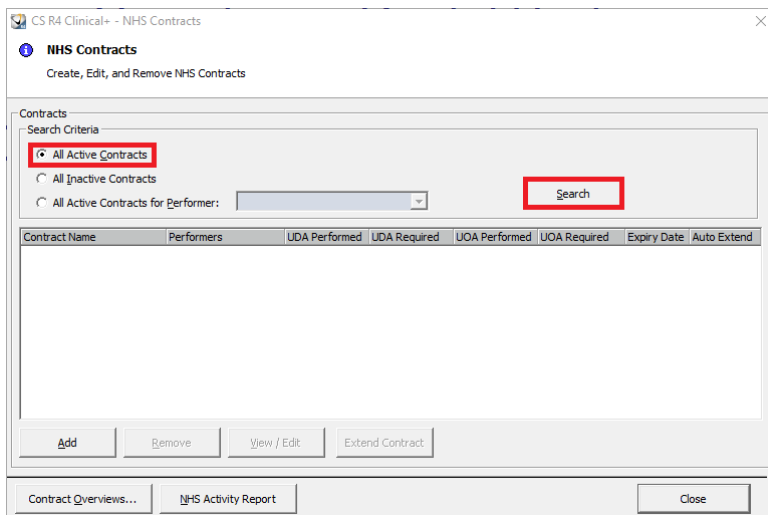
### Manually Extending the NHS Contract

- 1 From the **Main screen**, click **Edit** and click **NHS Contracts**. The **NHS Contracts** window is displayed.



## How to Extend Your NHS Contract (England, Wales & IoM only)

- 2 Select **All Active Contracts** and click **Search** to display all currently active contracts.



CS R4 Clinical+ - NHS Contracts

**NHS Contracts**  
Create, Edit, and Remove NHS Contracts

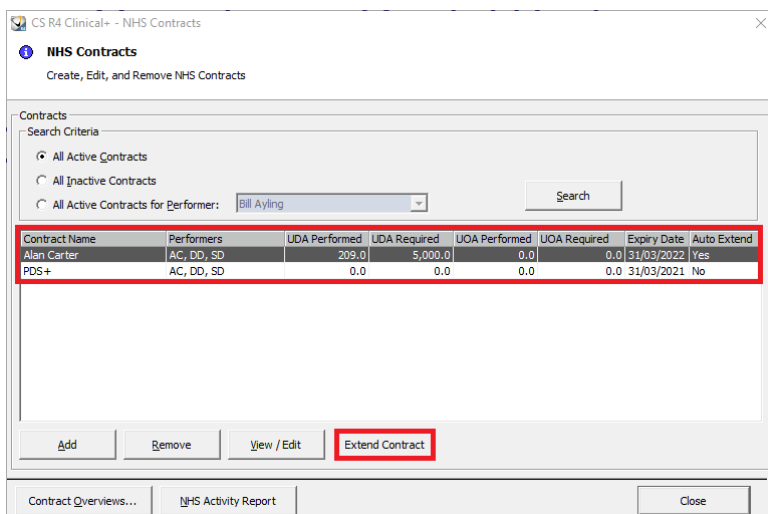
Contracts

Search Criteria

All Active Contracts  
 All Inactive Contracts  
 All Active Contracts for Performer:

Contract Name	Performers	UDA Performed	UDA Required	UOA Performed	UOA Required	Expiry Date	Auto Extend

- 3 Select the contract that is to be extended and click **Extend Contract**. The **Contract Period** is displayed.



CS R4 Clinical+ - NHS Contracts

**NHS Contracts**  
Create, Edit, and Remove NHS Contracts

Contracts

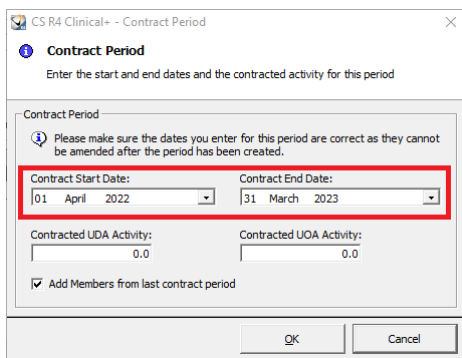
Search Criteria

All Active Contracts  
 All Inactive Contracts  
 All Active Contracts for Performer:

Contract Name	Performers	UDA Performed	UDA Required	UOA Performed	UOA Required	Expiry Date	Auto Extend
Alsh Carter	AC, DD, SD	209.0	5,000.0	0.0	0.0	31/03/2022	Yes
PDS+	AC, DD, SD	0.0	0.0	0.0	0.0	31/03/2021	No

## How to Extend Your NHS Contract (England, Wales & IoM only)

- The **Contract Start Date** and **Contract End Date** will be automatically updated to cover the next contract period.



CS R4 Clinical+ - Contract Period

**Contract Period**  
Enter the start and end dates and the contracted activity for this period

Contract Period  
Please make sure the dates you enter for this period are correct as they cannot be amended after the period has been created.

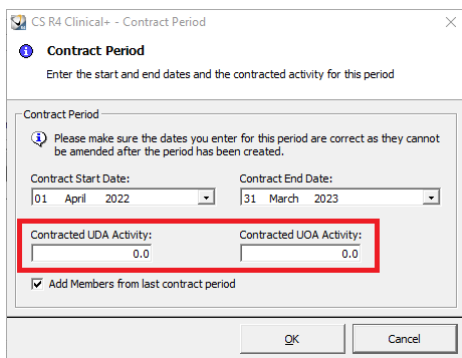
Contract Start Date: 01 April 2022  
Contract End Date: 31 March 2023

Contracted UDA Activity: 0.0  
Contracted UOA Activity: 0.0

Add Members from last contract period

OK Cancel

- If required, enter the **Contracted UDA Activity** and **Contracted UOA Activity** values.



CS R4 Clinical+ - Contract Period

**Contract Period**  
Enter the start and end dates and the contracted activity for this period

Contract Period  
Please make sure the dates you enter for this period are correct as they cannot be amended after the period has been created.

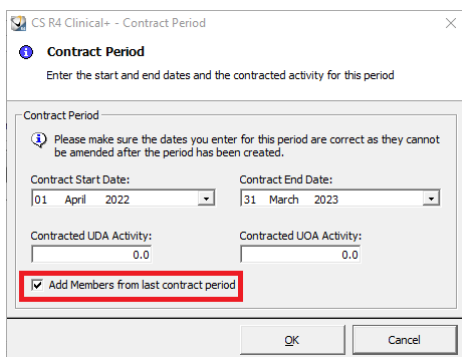
Contract Start Date: 01 April 2022  
Contract End Date: 31 March 2023

Contracted UDA Activity: 0.0  
Contracted UOA Activity: 0.0

Add Members from last contract period

OK Cancel

- If all existing performers are to be included in the new contract period, ensure that **Add Members from last contract period** is selected. If this option is left unticked, then each performer will need to be added individually.



CS R4 Clinical+ - Contract Period

**Contract Period**  
Enter the start and end dates and the contracted activity for this period

Contract Period  
Please make sure the dates you enter for this period are correct as they cannot be amended after the period has been created.

Contract Start Date: 01 April 2022  
Contract End Date: 31 March 2023

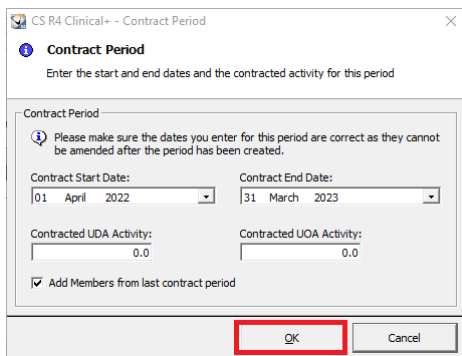
Contracted UDA Activity: 0.0  
Contracted UOA Activity: 0.0

Add Members from last contract period

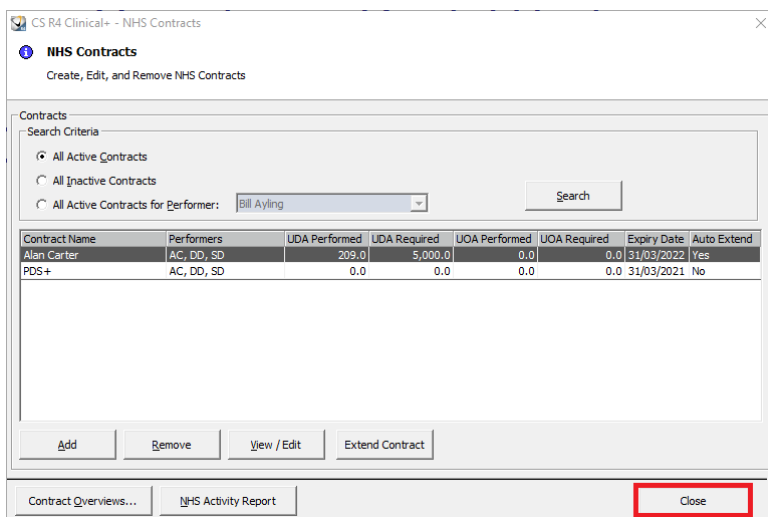
OK Cancel

## How to Extend Your NHS Contract (England, Wales & IoM only)

7 Click **OK**. The **NHS Contracts** window is displayed.



8 Click **Close**.



Contract Name	Performers	UDA Performed	UDA Required	UOA Performed	UOA Required	Expiry Date	Auto Extend
Alan Carter	AC, DD, SD	209.0	5,000.0	0.0	0.0	31/03/2022	Yes
PDS+	AC, DD, SD	0.0	0.0	0.0	0.0	31/03/2021	No