



OneSight

Issue Voucher Post Clinic

OneSight IT Operations

Issue Voucher Post Clinic
MEEAP Voucher System
User Guide

Overview

This document will go over the process of issuing a voucher post clinic in the MEEAP voucher system.

Access

To access, first go to the onesightclinics.org home page.



Once you are on the home page, click the option for “MEEAP” found at the top. After the page loads, go to the bottom under “Voucher System” and click the blue button for “Issue Voucher Post Clinic”.



ADMIN LEVEL ACCESS REQUIRED

User name

Password

LOGIN

You will now be on the Digital Voucher Admin login page. You *must* have admin access to login here. Enter in your user name and password and click the blue button at the bottom labelled “Login”.

The screenshot shows the OneSight Digital Voucher Admin interface. At the top left is the OneSight logo and the text 'DIGITAL VOUCHER'. Below this is a horizontal line, followed by the title 'BULK ISSUE AFTER CLINIC'. The form contains the following elements: a 'CLINIC YEAR' dropdown menu with '2020' selected and highlighted by a red box; a 'Clinic Name' dropdown menu; an 'Issue Voucher From Clinic' checkbox which is unchecked; a section header 'Individual Record Lookup' in a grey bar; three input fields labeled 'First Name:', 'Last Name:', and 'Clinic ID Number'; and a large blue 'SEARCH' button at the bottom center.

You will now be on the “Bulk Issue After Clinic” search page. Here you will be able to search for vouchers by the following fields.

Clinic Year – Drop down of different years for clinics.

Clinic Name – Drop down of all clinics in the system from the selected year.

Issue Voucher from Clinic – Select this box if you want to issue all vouchers from the selected clinic.

There is a break in the page for “Individual Record Lookup” which will allow you to search for individual recipients. This section has the following fields.

First Name – The first name of the recipient.

Last Name – The last name of the recipient.

Clinic ID Number – The clinic ID number for the recipient.

Once you have filled out the search criteria, click the blue button at the bottom labelled “Search”.

<input type="text" value="Search Again"/> <input type="text" value="Edit"/>					
<input type="checkbox"/>	<u>CLINIC ID</u>	<u>FIRST NAME:</u>	<u>LAST NAME:</u>	<u>ISSUE VOUCHER FROM CLINIC</u>	<u>RECIP EMAIL</u>
<input type="checkbox"/>	271570	xiomara	griffin		
<input type="checkbox"/>	271578	Maliek	Johnson		

<u>VOUCHER DATE ISSUED</u>	<u>ORGANIZATION</u>	<u>VCHR DEBTOR NUMBER</u>	<u>VOUCHER STATUS</u>	
				<input type="button" value="View Details"/> <input type="button" value="Edit"/>
				<input type="button" value="View Details"/> <input type="button" value="Edit"/>

You will now be on the voucher results page. At the top left you can click “Search Again” to go back to the search screen. The vouchers are sorted by the following fields.

Clinic ID – The clinic ID of where this voucher was issued.

First Name – The first name of the voucher recipient.

Last Name – The last name of the voucher recipient.

Issue Voucher from Clinic – Yes or no if the voucher was issued from clinic.

Recipient Email – The email address of the recipient.

Voucher Date Issued – The date the voucher was issued.

Organization – The organization that issued the voucher.

VCHR Debtor Number – The debtor number that issued the voucher.

Voucher Status – The current status of the voucher.

Edit

You are able to edit vouchers in a few different ways from this page.

The first way is by clicking “View Details” found to the right of the voucher.

 OneSight **DIGITAL VOUCHER**

Confirm or Update Details Below Issue Voucher

Voucher Number

V99396944

First Name:

TEST

Last Name:

TEST

Contact Email

bmaxwell@onesight.org

Birthday

08/03/2009 

VCHR ORGANIZATION

OneSight 

VCHR DATE ISSUED

09/09/2020

VCHR DEBTOR NUMBER

1234

SEND VOUCHER

BACK

You will now be on the voucher detail screen. Here you can edit many of the fields that were sorted on the last page as well as re-send the voucher. Once you have changed the fields you need, click the blue button at the bottom labelled "Send Voucher" or click "Back" to go back to the search results page.

The second way to edit a voucher is by clicking the "Edit" button found to the right of each voucher.

 [Edit](#)

This will change the selected voucher fields to be edited.

CLINIC ID	FIRST NAME:	LAST NAME:	ISSUE VOUCHER FROM CLINIC ▾	RECIP EMAIL
301454	TEST	TEST	Yes	bmaxwell@onesight.org

VOUCHER DATE ISSUED	ORGANIZATION	VCHR DEBTOR NUMBER	VOUCHER STATUS	
09/09/2020	OneSight ▾	1234	CREATED ▾	<input type="button" value="SEND VOUCHER"/> <input type="button" value="CANCEL"/>

Click the fields that you want to change and make the edits as needed. Once finished, click the blue button to the right labelled “Send Voucher” or click “Cancel” to cancel making changes.

The last way to make edits is with bulk editing. To do this, click the empty boxes found to the left of each voucher. You can select as many records as you need to. After you have selected the vouchers, click the “Edit” button at the top of the page.

Editing 25 Record(s) ✕

<input type="checkbox"/> Clinic ID	<Multiple Values>
<input type="checkbox"/> First Name:	<Multiple Values>
<input type="checkbox"/> Last Name:	<Multiple Values>
<input checked="" type="checkbox"/> Issue Voucher From Clinic	<input type="text"/>
<input type="checkbox"/> Recip Email *	<input type="text"/>
<input type="checkbox"/> Voucher Date Issued *	<input type="text"/>
<input type="checkbox"/> Organization *	<input type="text"/> ▾
<input type="checkbox"/> VCHR DEBTOR NUMBER	<input type="text"/>
<input type="checkbox"/> LC VCHR STATUS	Select ▾

This will pop up a new box for bulk editing. As you can see in the screenshot above we are editing 25 records at once. You can edit the following fields by clicking the empty box to the left of each one.

Issue Voucher from Clinic – Type Yes or No if the voucher was issued from clinic.

Recipient Email – The email address for the recipient.

Voucher Date Issued – The date the voucher was issued.

Organization – Drop down of organizations in the system.

VCHR Debtor Number – The debtor number that issued the voucher.

LC VCHR Status – Drop down with different statuses for the voucher.

Once you have made the bulk edits needed, click the blue button labelled “Update” at the bottom.