

NHS WALES

DOCUMENT OCR SCANNING MANAGEMENT

SUPPLIER READINESS

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CHECKLIST

The purpose of this document is to provide guidance to a supplier who sends emails with attached invoice and/or credit note documents for processing by the NHS Wales OCR Intelligence Scanning service.

The guidelines must be adhered to for NHS Wales to accept emails with attachments from suppliers.

Supplier Actions & Responsibilities

When sending invoices or credit notes via email, it is essential you adhere to the following rules:

- All e-mailed documents to be sent to nwssp.ocrinvoiceautomation@wales.nhs.uk
- An email must contain only PDF formatted documents. Any other document types will be rejected.
- A PDF document must only contain a single invoice (or a single credit note document), these can be single page or multiple pages. If any additional invoices are included in the PDF document, then the document will not be processed and will be rejected.
- The total size of each e-mail must not exceed 10MB.
- The PDF document must ideally be in portrait format and in a good quality, readable format.
- The document must contain a valid PO Box invoicing address.
- An e-mail must not include additional emails or other document types as attachments. In such cases, the email will be rejected.
- An e-mail must not contain any content in the body with additional information. Such content will not be picked up by the automated email processing service.
- A single email can contain multiple PDF formatted documents.
- Documents cannot be submitted as a secured PDF document.
- All invoices must quote a valid purchase order number unless there is an agreed exception.
- All credit notes must quote a valid purchase order number or invoice number.
- Statements should be sent to apsouth.statements@wales.nhs.uk and MUST be in an Excel format.
- Do not send any important letters or notifications to the email address as these will not be processed, such documents should be sent to NWSSP.APOracleCustomerHub@wales.nhs.uk

Important: You will not receive any email notification confirming whether your email has been rejected. Consequently, it is important to ensure the information adheres to the stipulated rules. If there are any queries regarding any emails, then please contact the NWSSP.APOracleCustomerHub@wales.nhs.uk.