

Appointments

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1. Introduction

The Appointments module in OPAS will allow you to make, maintain and analyse your appointments. Appointments can be made manually or you can use OPAS to find the next available appointment for you. Either way, the information regarding the appointment is held on the Patients main record for easy reference. Making appointments on OPAS will also enable you to produce appointment and collection letters, clinic lists, DNA letters, transport memos and statistical data at the press of a button.

2. Venues

Venues is the first screen that you must set up when starting to use the Appointments section of OPAS. It is not until the system knows where and when your clinics are held that it can create clinic dates for you to allocate appointments to.

A **Venue** should be created for each 'place' that clinics are held. You may need more than one venue if clinics are held away from the hospital, are held in more than one location of the hospital, or if you have more than one type of clinic i.e. an orthotic clinic and a wig clinic.

When appointment/collection letters are printed, they can include the address details of the **Venue** so that the patient knows where to go – so bear this in mind when deciding how to set up your **Venues**.

Creating a new venue

Menu: **Appointments – Venues**

Click on the 'enter' icon  (or Edit, Enter) and enter details in the following fields.

Reference is assigned automatically and cannot be changed

Clinic enter four lines of address for the clinic. The first line should be unique and identify the clinic, since only that line shows in pop-up menus from which the clinic is selected

Phone enter the clinic's phone number

Collect you can type up to 120 characters of instructions for collection, e.g. Monday to Friday, 10am – 3pm only.

Although the field is 120 characters wide, only the first 67 characters are displayed on the screen.

Information entered here can be included on the collection letters.

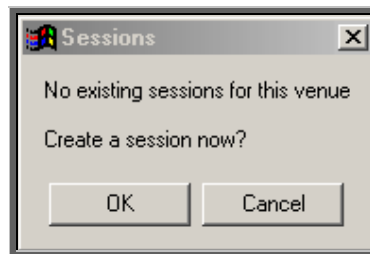
Letter select which collection letter is required for this venue (A-Z).

Directions if required you can enter 100 characters for directions to the clinic, e.g. Follow signs for Outpatients A and take first door on the left

Although the field is 100 characters wide, only the first 62 characters are displayed on the screen.

Information entered here can be included on the appointment/collection letters.

Once this information has been added, we need to input details of the sessions that are held at the venue. To do this click, on Goto at the top of the screen and then select Sessions. If no sessions exist for the venue you will be asked if you wish to add a session now.



The screen below will appear for you to enter the session details.

Clinic this will be entered automatically for you

Counter Clinician this will be entered automatically for you
select the Clinician from the pop-up list. (Clinicians to appear in the pop-up should be set up in **Utilities – Choices – Clinicians**)

Day select the day of the week from the pop-up list. (Saturday and Sunday do not appear in the list. If you need them to be, then they can be added in **Utilities – Choices – Days**)

Freq select the frequency of that session from the following options:

- Weekly i.e. every Monday
- Fortnightly i.e. every other Monday
- Tri-weekly i.e. every third Monday
- 1st day monthly i.e. the first Monday of the month
- 2nd day monthly i.e. the second Monday of the month
- 3rd day monthly i.e. the third Monday of the month
- 4th day monthly i.e. the four Monday of the month
- 5th day monthly i.e. the fifth Monday of the month

If you have a scenario that does not fit it any of these, then contact the OPAS Helpdesk for advice.

Start enter the time the clinic starts (in 24-hour notation, e.g. **0930**)

Break From enter the start of the break if there is one, else press **Enter** to leave this blank. This may not necessarily be a tea break, but perhaps a break in the clinic while the Clinician visits ward patients.

If you have a clinic that runs all day you can either enter this as one session with a break for lunch, or as two separate sessions i.e. one for the morning and another for the afternoon. When you make an appointment from the patient screen, you will have the ability to search for a morning or afternoon appointment. This functionality will only work effectively, however, if you have set full day clinics as two separate sessions.

Break To enter the end time of the break if required

End enter the end time of the session

Once you have completed all the fields, you will be asked if you wish to enter another session. Continue until all sessions have been entered and then press **Esc** to return to the **Venue** screen, where the information you have entered will appear in the Sessions box.

Sessions						
Clinician	Day	F	Start	Break From	Break To	End AP
Mr Orthotist	Tue	W	09:30:00			12:30:00 A
Mrs Orthotiste	Wed	W	08:00:00	12:00:00	14:15:00	16:00:00 A
Ivor Ninkling	Thu	5	09:00:00			12:30:00 A

Editing a venue

Menu: Appointments – Venues

Find the Venue that you wish to change.

If you wish to change information in the top part of the screen click on the ‘update’ icon





(or Edit, Uppdate).

Venues	
Reference	1
Phone:	01234 567890
Clinic	Appliance Department NHS Trust Hospital Infirmary Road Anytown
Collect:	Monday-Friday, 9:00 to 17:00
Letter:	A Collect letter type A
Directions:	Out-patients department, Level C. Next to Chiropody Department



All the fields can be edited except the *Reference* field. Move down the screen by pressing **Enter** until you reach the field you wish to change.

If you wish to change information in the session table, click on Goto at the top of the screen and then select Sessions.

Updating sessions

Using the ‘right arrow’ icon  (or **F6**) find the session to be edited. Click on the ‘update’ icon  (or Edit, Uppdate), and make the necessary changes.

Deleting sessions

Using the ‘right arrow’ icon  (or **F6**) find the session to be deleted. Click on the ‘delete’ icon  (or Edit, Delete).

Any changes made to the session information will not automatically change the details of clinic dates that have already been built. This will need to be changed manually. (see [Appointments - 4. Amending clinic dates](#)). If there are a lot of sessions to be changed, contact the OPAS Helpdesk for advice.


3. Creating clinic dates

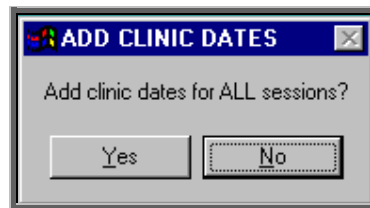
Having told the system when your clinics are held, i.e. which day, what times etc, the next step is to create clinic dates built on that information so that appointments can then be allocated to them.

a) Creating clinic dates for all sessions

Menu: **Appointments – Venues**

Find the **Venue** that you wish to create clinic dates for.

Click on the 'clinician' icon  (or Session).

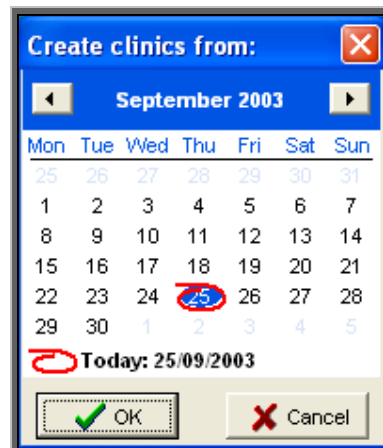


This prompt is asking if you wish to create clinic dates for all those clinics entered in the **SESSION** table for that Venue.

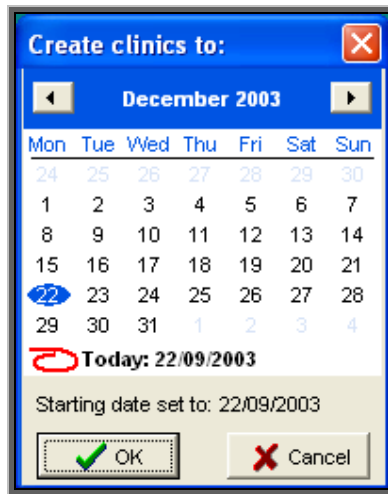
(If you do not want to create clinic dates for all sessions, click on **NO** and follow the instruction in *b) Creating clinic dates for individual sessions*)

Click on **Yes** to continue.

A calendar will appear in the middle of the screen to select the date you would like to create clinic dates from. It will default to today's date, but this can be changed to the date required.



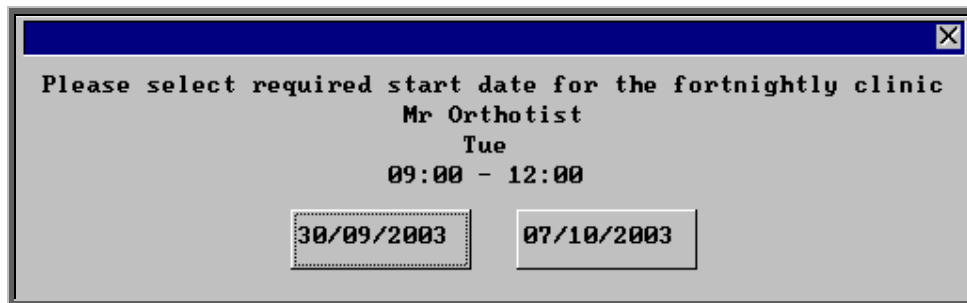
You will then be asked when you would like to create clinic dates to. We recommend that you do not build dates too far into the future as this could affect the speed of the appointment section within OPAS. Making clinic dates 3 to 6 months into the future would be ideal.



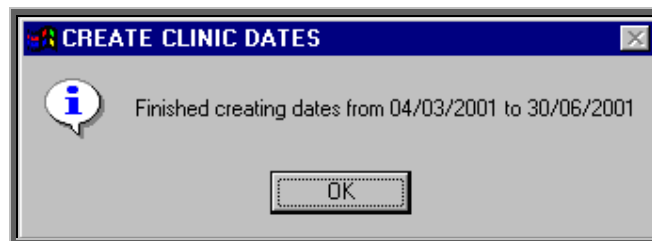
Having selected the 'to' date, press **Enter** (or click on OK). OPAS will now create the clinic dates.

If the date range you have entered overlaps dates that have already been created, duplicate dates will not be made as OPAS will check that the clinic date is not already there before it creates a new one.

If you have any sessions that are fortnightly or tri-weekly you will be asked to specify the date of the first session.



Select the appropriate date and OPAS will continue to create clinic dates, and when it has finished you will be notified.




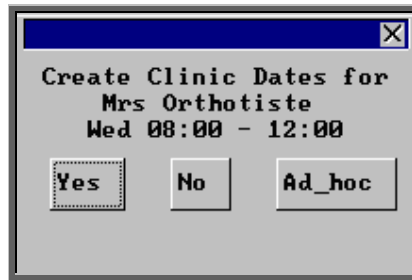
b) Creating clinic dates for individual sessions

Menu: **Appointments – Venues**

Find the **Venue** that you wish to create clinic dates for.

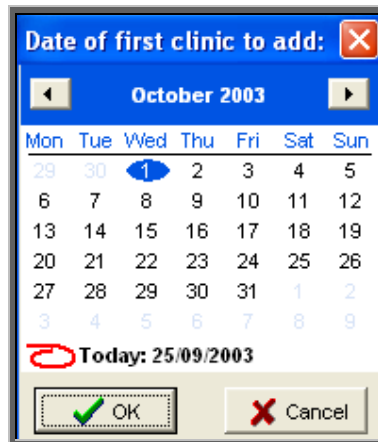
Press **Alt-T** and select **Session** to take you into the **Session** table. Using the up/down arrow keys on the keyboard, move to the Session that you wish to create

clinic dates for and then click on the ‘clinician’ icon  (or **Session**).

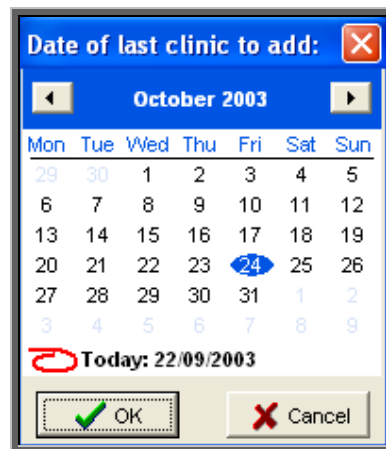


Select **Yes** to continue.

A calendar will appear in the middle of the screen to select the date of the first clinic you would like to create. It will default to the next occurrence of that clinic, but this can be changed to the date required.

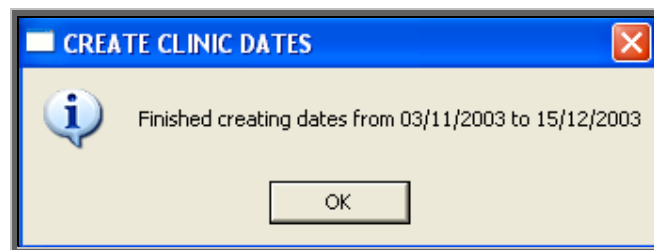


You will then be asked for the date of the last clinic to be created. We recommend that you do not build dates too far into the future as this could affect the speed of the appointment section within OPAS. Making clinic dates 3 to 6 months into the future would be ideal.



Having selected the 'last clinic' date, press **Enter** (or click on OK). OPAS will now create the clinic dates.

If the date range you have entered overlaps dates that have already been created, duplicate dates will not be made as OPAS will check that the clinic date is not already there before it makes a new one.



Once the dates have been created, you will be notified.


c) Creating ad-hoc clinics

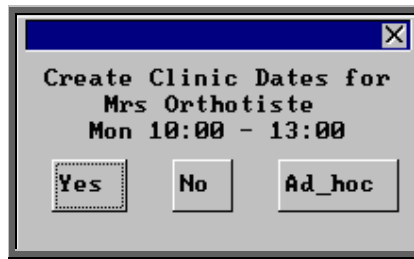
There may be occasions when you need to create additional clinic dates that are extra to the standard sessions e.g. a clinic that is not being held on the usual day due to a Bank Holiday. This can be done using the ad-hoc facility.

Menu: **Appointments – Venues**

Find the **Venue** that you wish to create clinic dates for.

Press **Alt-T** and select **Session** to take you into the **Session** table. Using the up/down arrow keys on the keyboard, move to a Session showing the Clinician who

is running the extra clinic, and then click on the 'clinician' icon  (or **Session**).



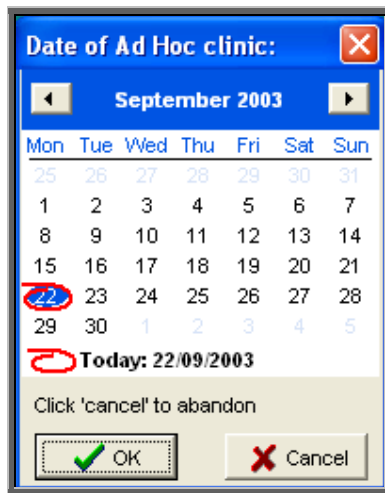
Select Ad_hoc to continue.



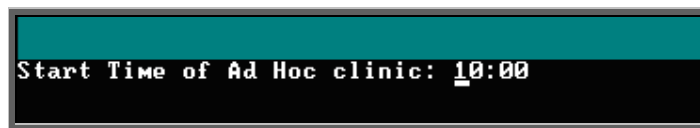
You will be asked to confirm that the ad-hoc clinic you wish to create is for the Clinician selected.

Select Yes to continue.

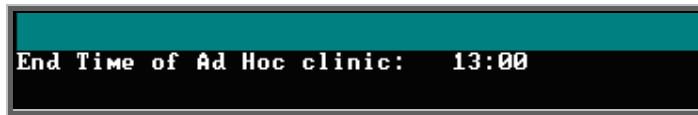
A calendar will appear in the middle of the screen to select the date of the ad-hoc clinic you wish to create. It will default to today's date, but this can be changed to the date required.



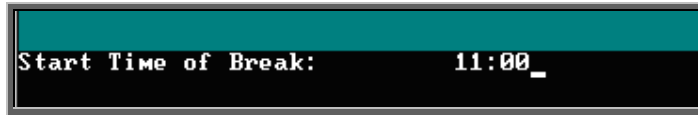
You will then be asked the time that the clinic will start;



the time it will finish;

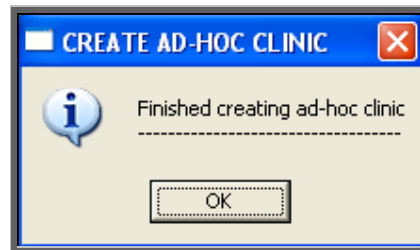


and then the times of the break (if applicable).



If you do not enter a time in the 'Start Time of Break' the 'End Time of Break' prompt will not be shown.

The following prompt will appear when the ad-hoc clinic has been created.



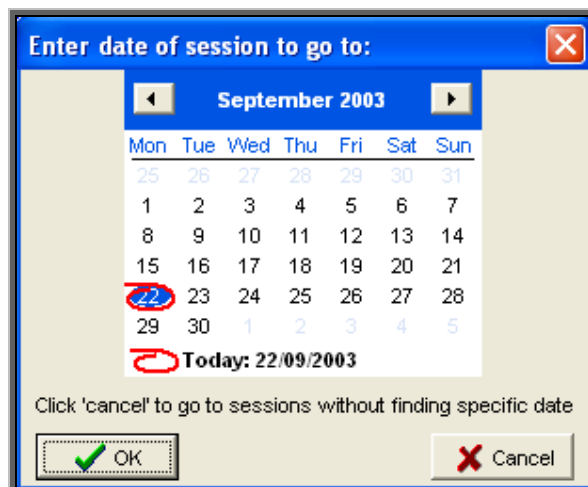
4. Viewing/Amending clinic dates (sessions)

Once clinic dates have been created they can be viewed/amended in the **Sessions** screen.

There are two ways to get to the **Sessions** screen. Both options are explained below, but future chapters will prompt you to use Option 1 as this is usually the quickest way. You can, however, use Option 2 in any future chapters where you have to go to the **Sessions** screen, if you prefer.

Option 1

Menu: Appointments – Current – Sessions



A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.


The date will default to today's date, and if you press the **Enter** key (or click on OK) you will be taken to the first session for today. Alternatively you can select a date of your choice and press the **Enter** key (or click on OK). Either way the rest of the sessions will be in date order.


If there are no sessions for the selected date, you will be taken to the first session after that date.

By pressing the **Esc** key at this prompt, you will be taken into the **Sessions** screen but you will be taken to the oldest current session and the sessions will be in Venue order.


Option 2

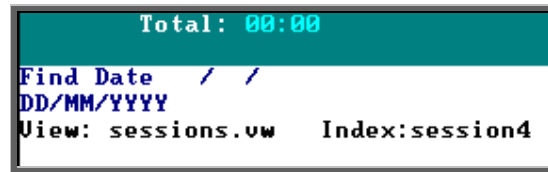
Menu: **Appointments – Venues**

Find the Venue whose clinic dates you wish to go to by using the 'arrow' icon  (or **F6**).

Then click on the 'clinics' icon  (or **G**oto, **C**linics).

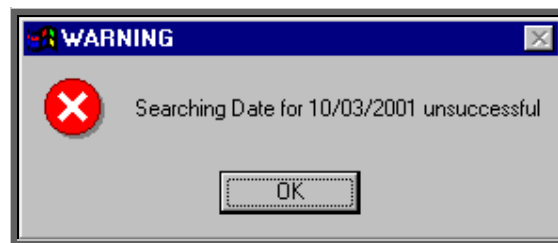
You will be taken into the **Sessions** screen and shown the oldest current session for that Venue. The sessions will be in date order, but the quickest way to find the session

you are looking for is to click on the 'find' icon  (or **D**ata, **F**ind) and select **D**ate from the options at the top of the screen.



At the bottom of the screen type in the date you are looking for and press **Enter**.

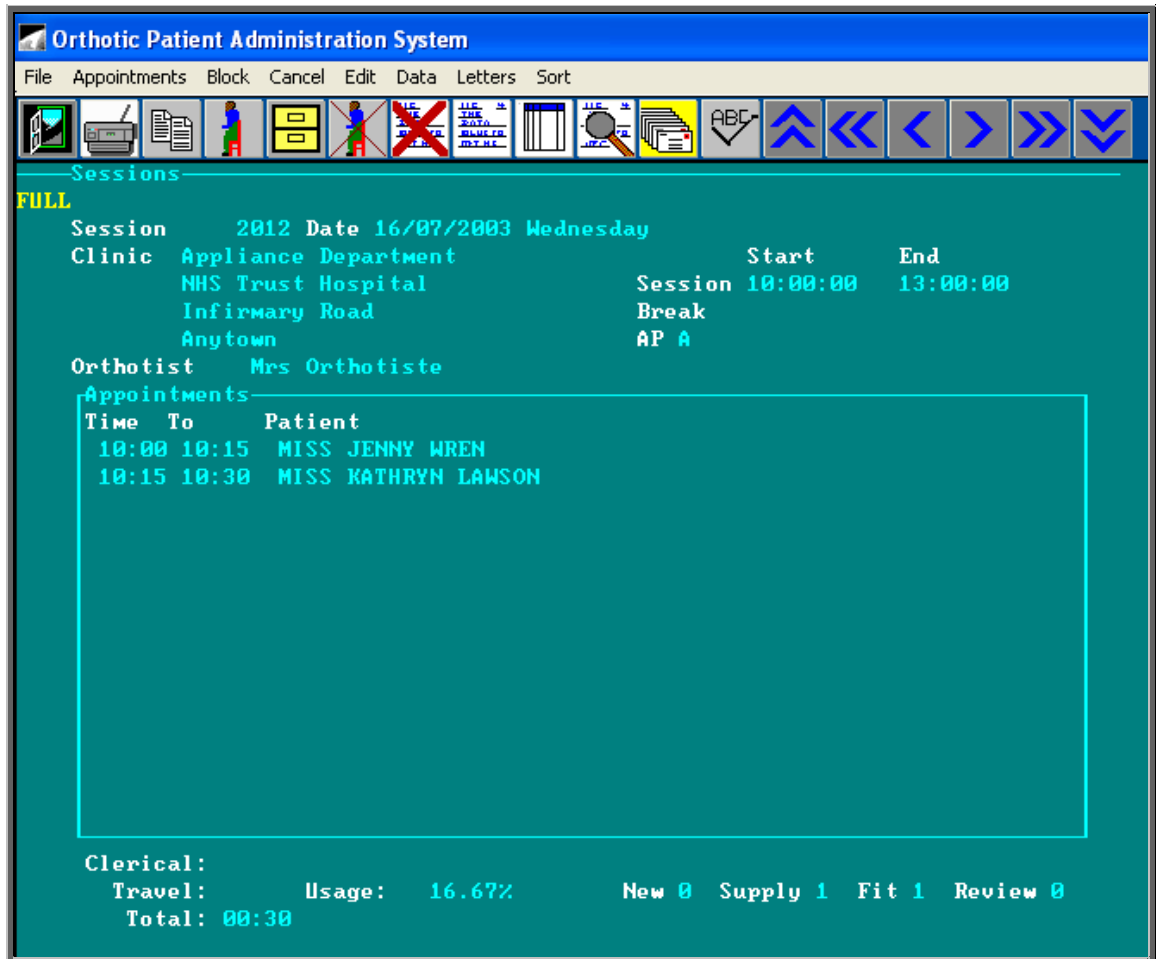
If there is a session for that venue on that date you will be taken to it. If, however, there is no session for the date entered, the following message will appear.



Note: When you go to the **Session** screen from the **Venue** screen, you will only be able to see sessions for that venue.

The Sessions screen

Once you reach the **Sessions** screen (using either Option 1 or Option 2 above) the screen usually looks like this:

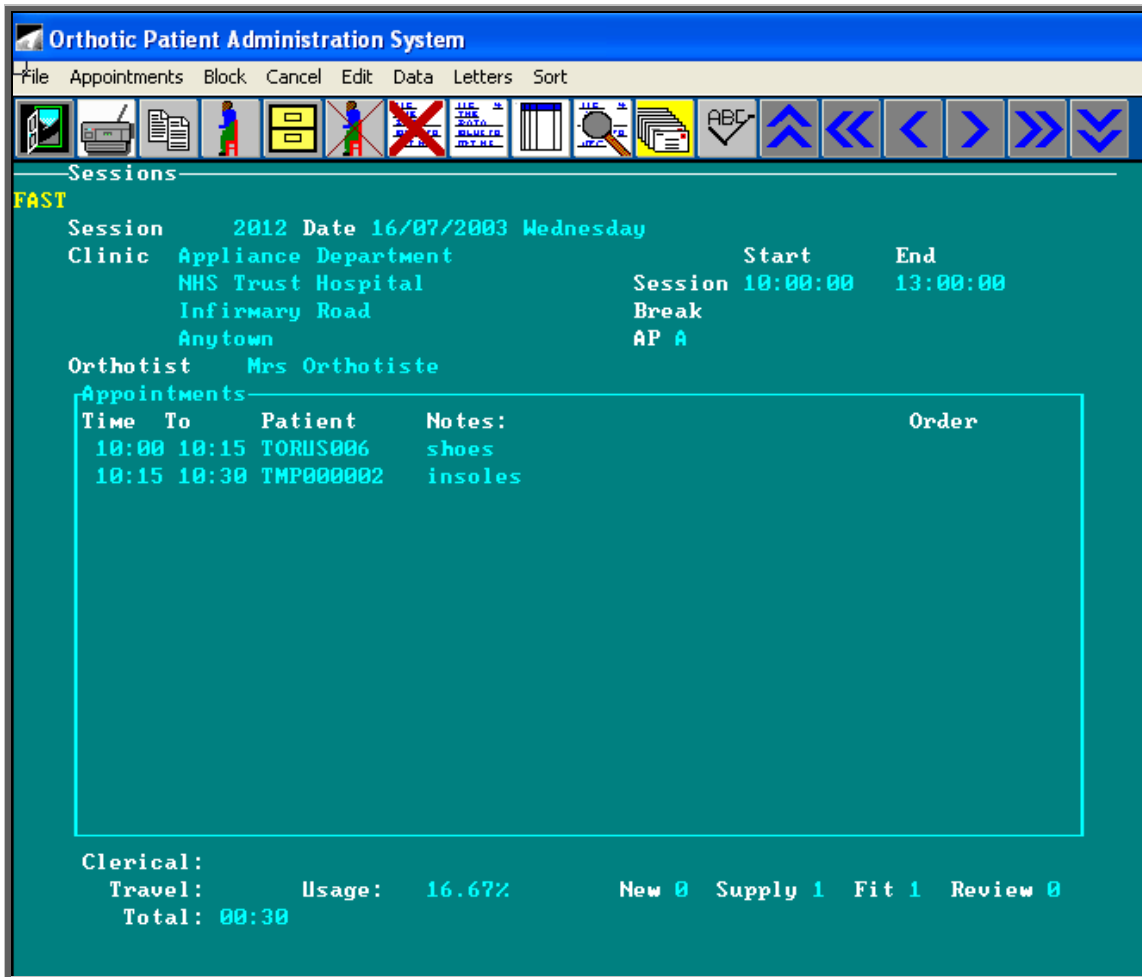



This is what we refer to as the **FULL Session** screen. This is indicated by the word **FULL** in the top left corner of the screen.

In order to speed up the time taken to go initially into the **Sessions** screen and the time taken to move between sessions, we have added a File Swap option. This will work in the same way as the File Swap facility in the **Patient** screen.



If you click on the 'swap' icon (or File, Swap) the screen will change to the **FAST** session screen.



By clicking on the 'swap' icon  (or File, Swap) again the screen will change back to the **FULL** session screen.

OPAS remembers which version of the **Sessions** screen you were last using. This information is held against your user name so each person can use the screen that they prefer.

If you leave the **Sessions** while in the **FAST** screen, when you next go into **Sessions** it will go into the **FAST** screen which will load much quicker. Once in the **Sessions** screen you can change back at any time to the **FULL** screen by clicking on the 'swap' icon



(or File, Swap).

Editing sessions

If the details of a clinic change permanently, then this change of information must be recorded in the **Venue** screen (see [Appointments - Note 2. Venues](#)), so that when clinic dates are created in the future they will be built on the correct information. If, however, after creating the clinic dates, the details of the clinic change, then the individual clinic dates (sessions) can be edited.

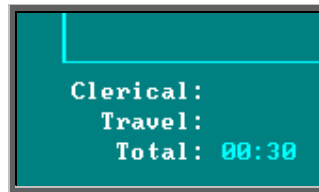
Having found the session to be amended (using Option 1 or Option 2 above), click on

the 'update' icon  (or Edit, Update).

You then have the ability to change the

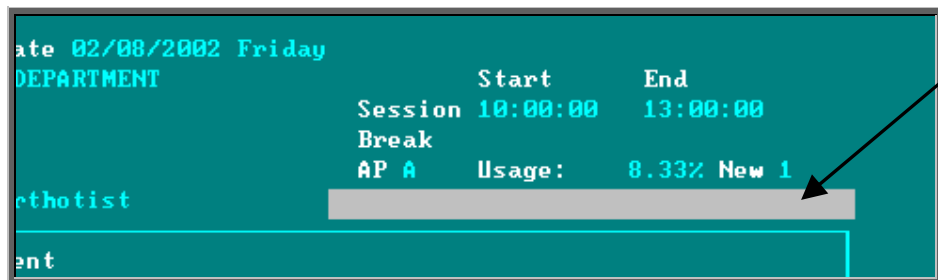
- Start time*
- End time*
- Break times*
- Date*
- Clinician*

While you are in update mode you can also record the relevant time spent by the Clinician travelling to and from the clinic and time spent dealing with administration matters. This can be done by entering the relevant time in minutes in the *Clerical* and *Travel* fields underneath the session table.

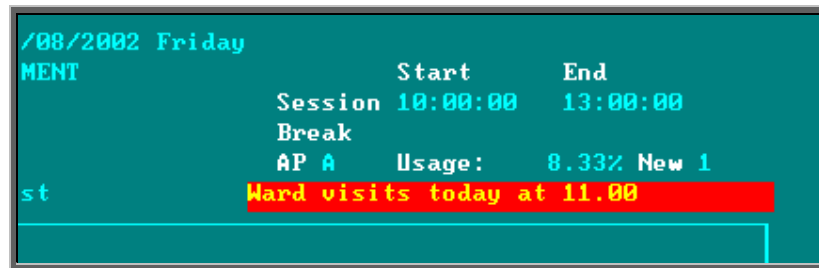


The *Total* field will add together the appointment times and any entries in the *Travel* and *Clerical* field to give the whole time spent at the clinic.

You also have the ability to add a note onto the session screen. This *Note* field does not have a title to show where it is, but it is underneath the clinic times, and will become highlighted when you are on it.



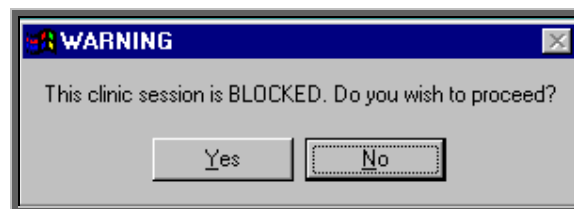
Enter the note in the space (upto 35 characters). Once entered, the note will appear in red so that it stands out.




Once you have finished updating the session, press **Ctrl-Enter** to save the changes.

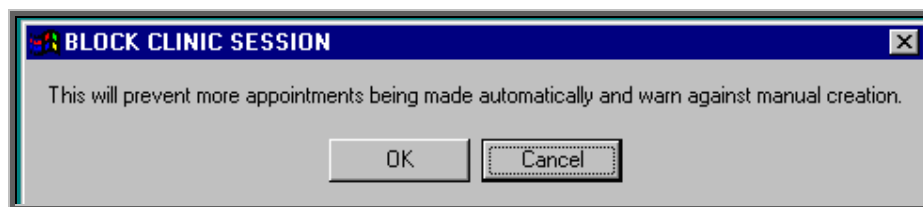
5. Blocking clinic dates (sessions)

Blocking a session prevents any further appointments being made automatically in this session (i.e. when making appointments from the **Orders, Patient** screen or **Waiting List** screen, any available appointments on a blocked session will not be offered) and will warn you if you try to make an appointment manually.



Menu: Appointments – Current – Sessions

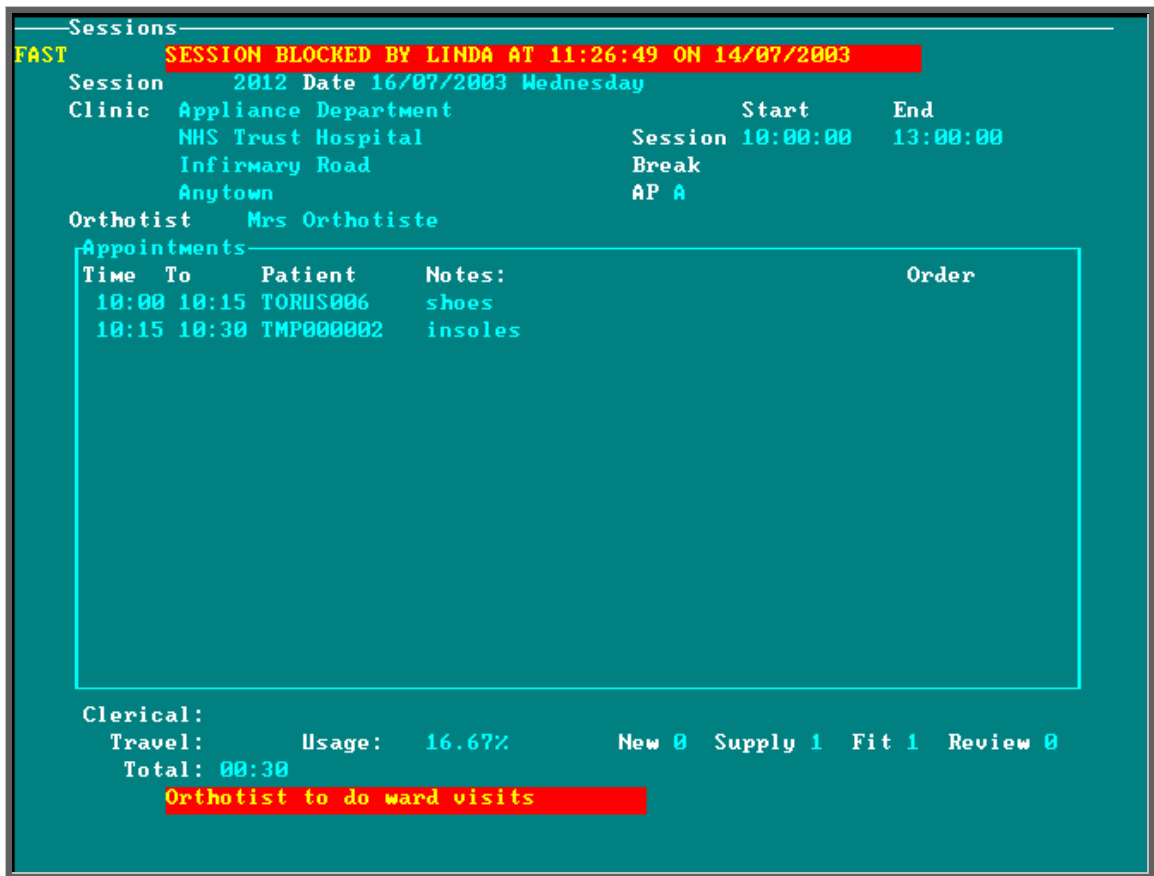
Find the session you wish to block and click on the 'block' icon  (or **B**lock).




To continue, click on OK, and at the bottom of the screen type the reason (up to 35 characters) why the session is being blocked.



Once the reason has been entered, press **Enter** and the session screen will now show who blocked the session, when and why.



A blocked session can be unblocked, simply by clicking on the 'block' icon  (or **Block**) again.



Once a session is unblocked, all the red block banners disappear leaving the session open for making appointments. If you are looking at a session that you believe was previously blocked, you can find out who unblocked the clinic and when by following the instructions below.



Click on the 'calculator' icon in the top right hand corner of the screen.

In the formulae box type **[Reason:]** and press the **F5** key.

The answer will then be shown in the result box.

The screenshot shows a calculator interface with two main sections. The top section is labeled 'Result' and contains the text 'Unblocked by LINDA 14/07/2003' followed by 'Text' on the next line. The bottom section is labeled 'Formula' and contains the text '[Reason:]'.

Once you have finished, press the **Esc** key to abandon the calculator option.

6. Limiting the number of appointments per session

When appointments are created, they can be categorised as being a **New**, a **Fitting**, a **Supply** or a **Review** appointment. This enables statistical analysis of your appointments, but as this information can be seen on the session it enables you to see at a glance the type of appointments already made for that session.

```

Clerical:
Travel:      Usage:   16.67%      New 1  Supply 1  Fit 0  Review 0
Total: 00:30
  
```

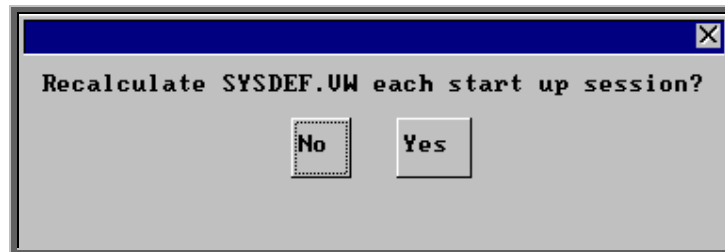
This can then be taken a step further by setting up in the system parameter screen the accepted number of each type of appointment per session. To do this, go into **Utilities** –

Choices – System. Press the **Pg-Dn** key to see the Max Appointments section and fill in appropriately.

```

Max Appointments      New 2
per session           Supply 2
                       Fit 4
0 = unlimited         Review 2
    
```

Press **Ctrl-Enter** to save the changes made. The following prompt will appear. Press the **Enter** key.



Having done this, you will now be able to see on the **Session** screen when you have reached the maximum number of a type of appointment, and when you have exceeded it.

```

Clerical:
Travel:      Usage:  25.00%      New 1  Supply 2  Fit 0  Review 0
Total: 00:45
    
```

Yellow highlight indicates that you have reached your maximum for that type of appointment

```

Clerical:
Travel:      Usage:  33.33%      New 1  Supply 3  Fit 0  Review 0
Total: 01:00
    
```

Red highlight indicates that you have exceeded your maximum for that type of appointment

When you are making an appointment using an automatic method, (i.e. OPAS is looking for available appointments for you) sessions will not be offered where the maximum for that type of appointment has been reached.

Note: Appointments made from the **Order** screen create a **Fitting** appointment.

7. Cancelling clinic dates (sessions)


A session can be cancelled if required. However, unlike the **Block** option ([see Appointments - Note 5. Blocking clinic dates \(sessions\)](#)), you **cannot** un-Cancel a session. Therefore, please be sure that you do want to cancel a session before following the instructions below.

Cancelling a session prevents any appointments being made automatically in this session (i.e. when making appointments from the **Orders, Patient** screen or **Waiting List** screen), and will not let you make an appointment manually.



If there are any appointments booked on the session that you are cancelling, OPAS will automatically re-appoint them to the next available appointment at the same Venue as the cancelled session (but not necessarily the same Clinician). You will have no say as to where these replacement appointments are allocated – it will simply find the first suitable appointments. If you want to control where the new appointments are allocated, the appointments need to be cancelled individually in the normal way ([see Appointments - Note 13. Cancelling appointments](#)) before the session is cancelled.

Menu: **Appointments – Current – Sessions**

Find the session that you wish to cancel and click on the 'cancel' icon  (or **E**dit, **C**ancel).

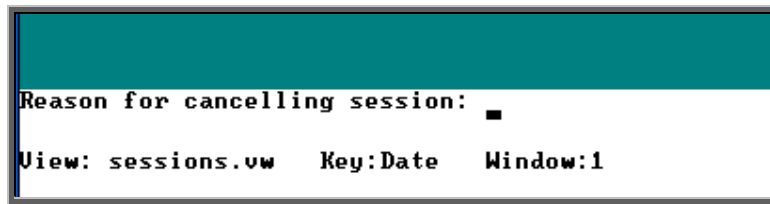
If there are any appointments booked for this session, you will be informed, and asked if you wish to continue to cancel the session. If you select **Yes**, OPAS will re-appoint these to the next available appointments at the same Venue as the session being cancelled.



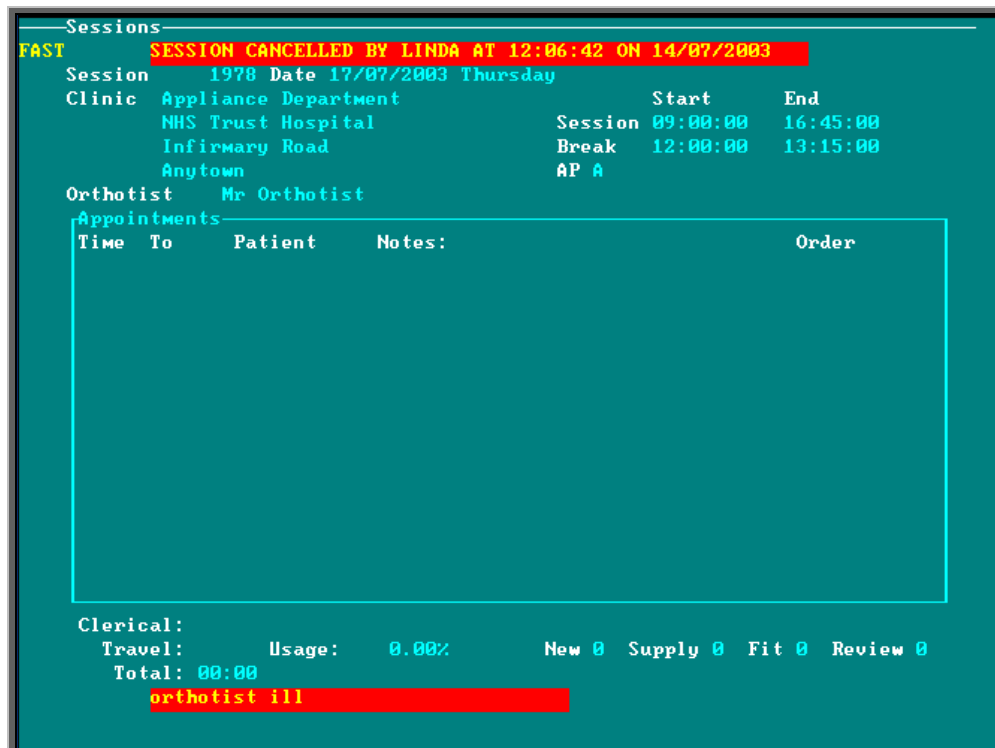
If you do not want the appointments to be moved, but you do want to prevent further appointments being made for this session, select **No**, and then use the **B**lock option instead.

Do not click on Yes unless you are sure that you want to cancel the session. This is your last chance to abort this option.

At the bottom of the screen, you will be asked to type the reason (up to 35 characters) for cancelling the session.



Once the reason has been entered, press **Enter** and the session screen will now show who cancelled the session, when and why.



Note. A session cannot be un-cancelled. If you accidentally cancel a session in error, then you will need to re-create the session using the ad-hoc facility (see Appointments - Note 3. Creating clinic dates). As OPAS will not let clinic dates be duplicated, before creating the ad-hoc session, you will need to edit the date of the cancelled session to a date that clinics are not held e.g. a Sunday's date (see Appointments - Note 4. Viewing/Amending clinic dates (sessions)).

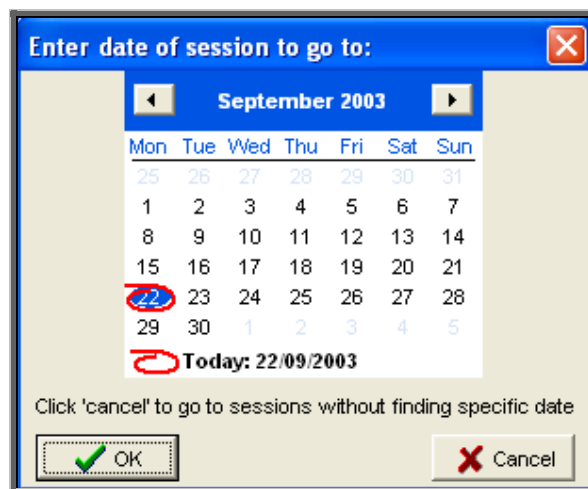
8. Allocating appointments manually

There are five different ways of making an appointment on OPAS. Three of them are automatic i.e. you are letting the system find the next available appointment, and two ways are manual methods i.e. you tell OPAS the date and time required. You do not have to keep to one way of making appointments – the idea is to use whichever way is most suitable for the situation. The three automatic methods are explained in Notes 9, 10 and 11 that follow, while the two manual methods are covered below.

1. Making manual appointments via the Sessions screen

Menu: Appointments – Current – Sessions

Making appointments using the automatic methods are quicker, but there are times when you need to use the **Sessions** screen to make the appointment, as this is the only way that you can break the guidelines that you have laid down e.g. making an appointment outside the clinic times or for a blocked or full clinic.



A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

The date will default to today's date, and if you press the **Enter** key (or click on OK) you will be taken to the first session for today. Alternatively you can select a date of your choice and press the **Enter** key (or click on OK). Either way the rest of the sessions will be in date order.

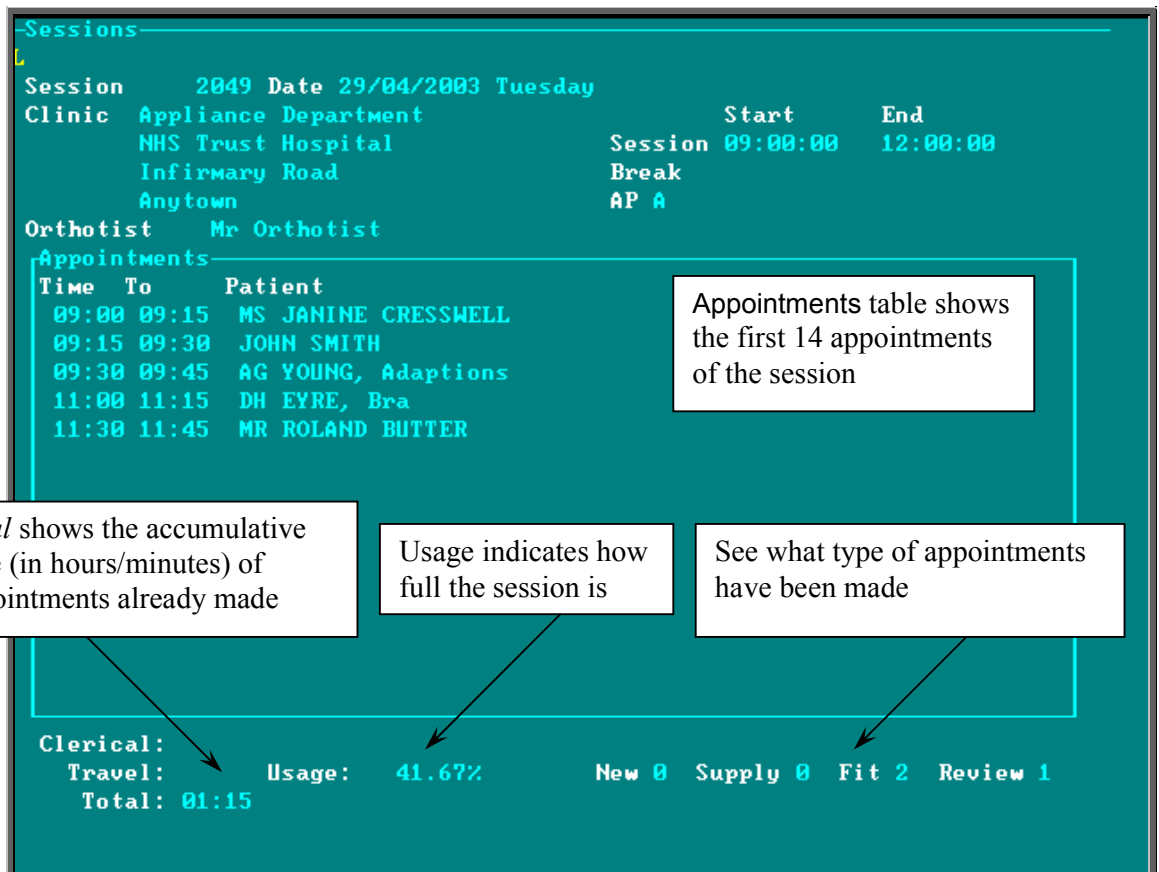
If there are no sessions for the selected date, you will be taken to the first session after that date.

By pressing the **Esc** key at this prompt, you will be taken into the **Sessions** screen but you will be taken to the oldest current session and the sessions will be in Venue order.

Having selected the date required you will be taken to that days session. If there is more than one clinic running that day you may need to move to the next session using

the 'arrow' icon  (or **F6**).

Once the correct session is found you will be able to see what appointments have already been made, and whether there is space to make any more.



Sessions

Session 2049 Date 29/04/2003 Tuesday

Clinic Appliance Department
NHS Trust Hospital
Infirmary Road
Anytown

Start 09:00:00 End 12:00:00
Break
AP A

Orthotist Mr Orthotist

Appointments

Time To	Patient
09:00 09:15	MS JANINE CRESSWELL
09:15 09:30	JOHN SMITH
09:30 09:45	AG YOUNG, Adaptions
11:00 11:15	DH EYRE, Bra
11:30 11:45	MR ROLAND BUTTER

Appointments table shows the first 14 appointments of the session

Total shows the accumulative time (in hours/minutes) of appointments already made

Usage indicates how full the session is

See what type of appointments have been made

Clerical:
Travel:
Total: 01:15

Usage: 41.67%

New 0 Supply 0 Fit 2 Review 1

- The Appointments table will only display the first 14 appointment of the session. This should be enough to see all the appointments that have been made.

If, however, there are more than 14 appointments on the session, press **Alt-T** and select Appointments. Then use **PgDn** and **PgUp** to scroll up and down the table.

To return to the main screen press **Alt-R**, or click anywhere on the screen (where there is not a table) with the mouse.



- When making an appointment, you can record whether the patient is

N for new
S for supply
F for fit
R for review


This information is then displayed at the bottom of the **Session** screen, so at a glance, you can see how many of each type of patient is booked in for that session.

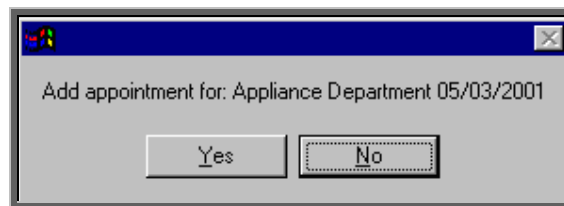
Clerical:				
Travel:	Usage:	16.67%	New 1	Supply 1
Total:	00:30		Fit 0	Review 0

This can then be taken a step further by setting up in the system parameter screen the accepted number of each type of appointment ([see Appointments - Note 6. Limiting the number of appointments per session](#))

- If, having looked at the session, you decide it is already too full to make any more appointments on, you can move to the next session using the 'arrow' icon  (or **F6**) or search for an alternate date using the 'find' icon  (or **Data, Find**).

Making the appointment

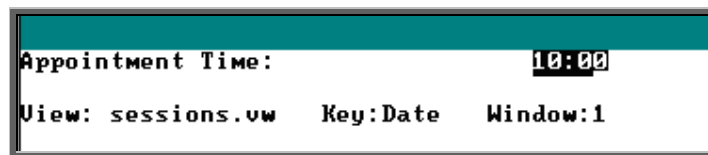
Once you have found the session you wish to make an appointment on, click on the 'appointment' icon  (or **A**ppointments, **A**dd).



You are asked to confirm that you wish to make an appointment for this session. Click on **Yes** to continue.

Note. An appointment cannot be created for a patient that has not been entered onto OPAS. If you suspect that the patient has not yet been entered onto OPAS, you should select **No** and go back to the **Patients** screen and add them as a patient first.

At the bottom of the screen you will be asked to enter the time of the appointment required.

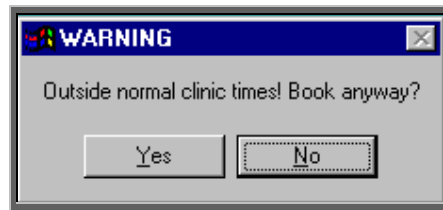


If you select an appointment time that is already taken you will get the following message and have to try adding an appointment again, this time with a valid time.



Note. Although you cannot add two appointments with the same start time, you can manually add appointments that overlap i.e. you cannot have two 15-minute appointments at 10.00, but you can have a 15-minute appointment at 10.00 and another 15-minute appointment at 10.05.

If you select an appointment time that is outside the normal clinic times you will get the following prompt, but you can continue to make the appointment if necessary.



Once you have selected a valid appointment time you will be taken to the appointment screen where the details of the appointment can be completed. The fields below in red **must** be completed. The other fields are optional.

Duration will default to your standard appointment length (as set up in **Utilities – Choices – System**) but can be changed to the length of appointment required

Full enter Y if this is a fully booked appointment. You can control what defaults into this field using the default screen (**Utilities - Choices - Defaults**)

Partial enter Y if this is a partially booked appointment. NB. if you enter Y in the *Full* field, N will automatically default into the *Partial* field and visa versa

Patient select the patient from the pop-up list

Order if the appointment relates to an order that has been entered on OPAS, then the order number can be entered here. If you know that there is an order, but cannot remember the order number, press the **Tab** key to see a pop-up list of all the orders.

No	Hospital No
C00219	ABC23456
G00220	ABC23456
G00221	786756
G00222	AH280965
G00223	776655
G00224	G54367

Move the green cursor into the Hospital No column and type in the patients Hospital number to show the order numbers for that patient.

Notes enter the reason for the appointment here.

What is entered here can appear on the appointment letter to the patient so that they know what the appointment is for.

<i>Comments</i>	additional comments can be entered here. These do not appear on appointment letters but can be printed on clinic lists.
<i>Event</i>	an event can be attached to an appointment. This gives the Clinician the opportunity to attach specific notes after he has seen the patient. This is achieved by answering set questions that relate to the type of appointment. (See Note 18 - Appointments - Auditing appointments)
<i>Letter</i>	will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities - Note 23. Choices - Letters)
<i>Advised</i>	it is this field that controls whether an appointment letter is printed. If you require an appointment letter to be printed, then leave this field blank. If you do not want an appointment letter to be printed, then enter a date here (pressing F2 will insert today's date for you).
<i>New</i>	enter Y if this is a new patient, or N if they have been seen before. Alternatively select S for supply F for fit R for review
<i>Type</i>	enter either O for an Out-patient I for an In-patient W for a Walk-in patient
<i>Referral</i>	if this is a new referral, the date of the referral can be entered here. This would then give you the ability to analyse how long it has taken from referral to appointment.
<i>Consref</i>	if the referrer entered on the patient record is not the referrer who referred the patient for this appointment, then an alternate referrer can be selected from the pop-up list (press Tab to show the pop-up list).
<i>Purchaser</i>	if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected from the pop-up list (press Tab to show the pop-up list)
<i>Episode</i>	the appointment can be attached to a care episode.

Note: On the **Patient** screen, there are two fields that are connected with making appointments.

Earliest: 10:00:00
Latest: 16:00:00

When making an appointment manually in the session screen, a warning message will appear if the time given to the patient does not agree with times entered in these fields.

Day: Monday
Time 09:30:00 Duration 15
Too early for this patient
Patient 12345QWERTY New: Type:

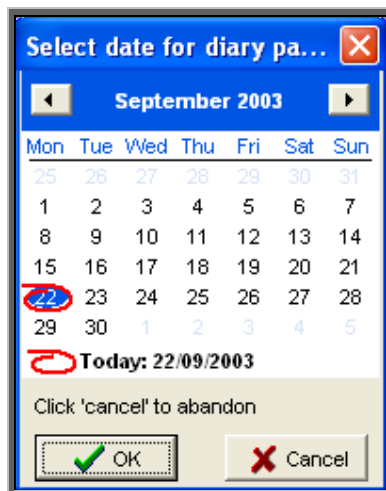
or

Day: Monday
Time 16:15:00 Duration 15
Too late for this patient
Patient 12345QWERTY New: Type:

Having been given the warning message, if you continue to make the appointment anyway, the message will disappear when you have finished filling in the appointment details.

2. Making manual appointments via the Diary screen.

Menu: Appointments – Current – Diary

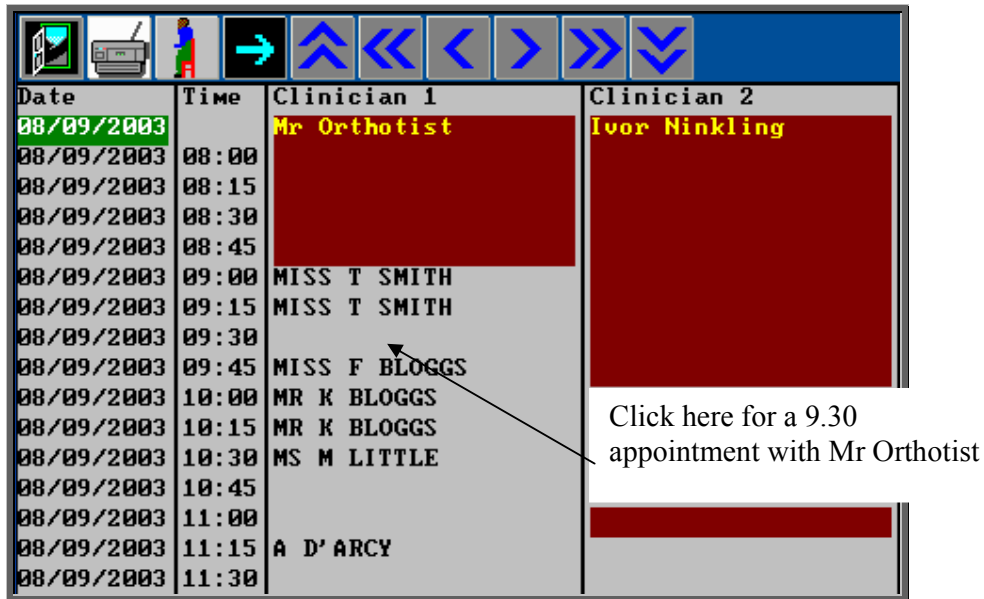



A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

The date will default to today's date, and if you press the **Enter** key (or click on OK) you will be taken to the diary page for today. Alternatively you can select a date of your choice and press the **Enter** key (or click on OK).

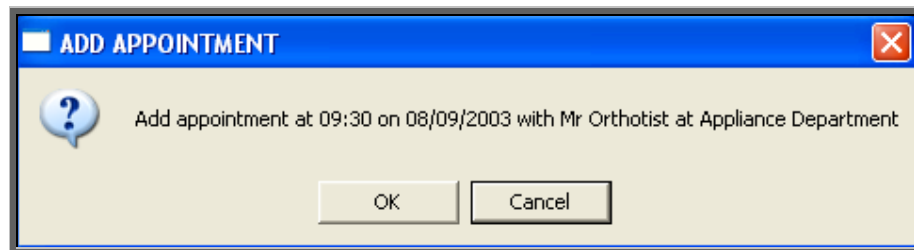
Having entered the date required you will be taken to that days diary page.

You will be able to see which appointments have been allocated, as these will contain the patient's name. The red area of the screen represents times outside the clinic hours, whereas the grey area is available for making appointments. Unlike making an appointment in the **Session** screen, you **can not** make appointments in the **Diary** screen that are outside the clinic hours.



To make an appointment, click on the 'appointment' icon  (or **Appoint**), and then click with the mouse by the slot you wish to take.

If you need to take more than one slot (i.e. a half hour appointment) click on the first slot as you will be able to change the length in the **Appointment** screen. The following prompt will appear for you to confirm that you have selected the correct time, Clinician and Clinic. Click on OK to continue.



You will then be taken into the **Appointment** screen to fill out the details of the appointment. The fields below in red **must** be completed. The other fields are optional.

Duration will default to your standard appointment length (as set up in **Utilities – Choices – System**) but can be changed to the length of appointment required

Full enter Y if this is a fully booked appointment. You can control what defaults into this field using the default screen (**Utilities - Choices - Defaults**)

Partial enter Y if this is a partially booked appointment. NB. if you enter Y in the *Full* field, N will automatically default into the *Partial* field and visa versa

Patient select the patient from the pop-up list

Order if the appointment relates to an order that has been entered on OPAS then the order number can be entered here. If you know that there is an order, but cannot remember the order number, press the **Tab** key to see a pop-up list of all the orders.

No	Hospital No
C00219	ABC23456
G00220	ABC23456
G00221	786756
G00222	AH280965
G00223	776655
G00224	G54367

Move the green cursor into the Hospital No column and type in the patients Hospital number to show the order numbers for that patient.

Notes enter the reason for the appointment here.

What is entered here can appear on the appointment letter to the patient so that they know what the appointment is for.

Comments additional comments can be entered here. These do not appear on appointment letters but can be printed on clinic lists.

Event an event can be attached to an appointment. This gives the Clinician the opportunity to attach specific notes after he has seen the patient. This is achieved by answering set questions that relate to the type of appointment. (See Note 18 - Appointments - Auditing appointments)

- Letter* will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in **Utilities – Choices – Letters** (see **Utilities - Note 23. Choices - Letters**)

- Advised* it is this field that controls whether an appointment letter is printed. If you require an appointment letter to be printed, then leave this field blank. If you do not want an appointment letter to be printed, then enter a date here (pressing **F2** will insert today's date for you).

- New* enter Y if this is a new patient or N if they have been seen before.
 Alternatively select S for supply
 F for fit
 R for review

- Type* enter either
 O for an Out-patient
 I for an In-patient
 W for a Walk-in patient

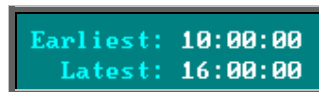
- Referral* if this is a new referral, the date of the referral can be entered here. This would then give you the ability to analyse how long it has taken from referral to appointment.

- Consref* if the referrer entered on the patient record is not the referrer who referred the patient for this appointment, then an alternate referrer can be selected from the pop-up list (press **Tab** to show the pop-up list)

- Purchaser* if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected.

- Episode* the appointment can be attached to a care episode.

Note: On the **Patient** screen, there are two fields that are connected with making appointments.



When making an appointment manually in the session screen, a warning message will appear if the time given to the patient does not agree with times entered in these fields.

Day:	Monday	Duration	15
Time	09:30:00		
Too early for this patient			
Patient	12345QWERTY	New:	Type:

or

Day:	Monday	Duration	15
Time	16:15:00		
Too late for this patient			
Patient	12345QWERTY	New:	Type:

Having been given the warning message, if you continue to make the appointment anyway, the message will disappear when you have finished filling in the appointment details.

9. Allocating appointments automatically (via order)

Appointments can be made automatically when you tell OPAS that the goods on an order have been received. This is probably the most effective way of making appointments, as two tasks are been completed in one step.

Menu: **History - Orders**

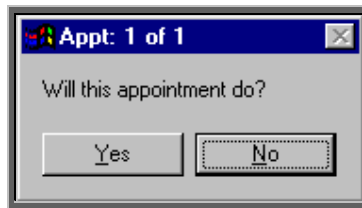


Find the relevant order using the 'find' icon (or Data, Find). (You can find the order in the **Patients** screen but if you have a lot of orders to book in it is much quicker this way)

Check that 'A' has been entered in the *ACO* field, as this is what tells OPAS to make an appointment when the goods are booked in.

At the top of the screen above the icons, click on the word Goods and then select In from the drop down menu.

If the patient already has a future appointment, then you will be shown the existing appointment and asked if it will do, or whether you do need to make another appointment.

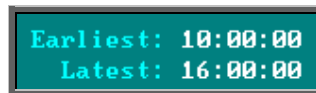


If you do wish to make another appointment or if there was no existing appointment for the patient you will be told the first available appointment based on the criteria entered on the order, i.e.

- length of appointment
- clinic selected
- Clinician selected (optional)
- day selected (optional)

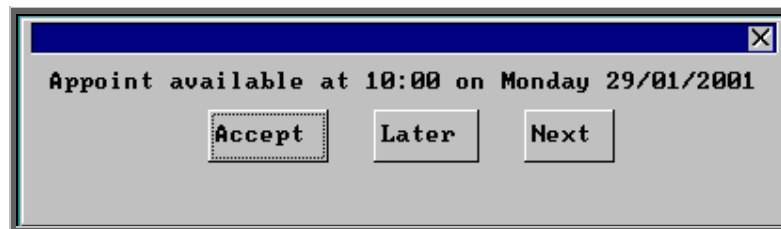
and also information held on the patient record

On the **Patient** screen, there are two fields that are connected with making appointments.



If times are entered into either or both of these fields, the time of the offered appointment will be restricted accordingly. In the above example, no appointments will be offered before 10am or after 4pm.

Once an appointment has been found, the following message will appear.



The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

When the first available appointment is offered, you initially have 3 options.

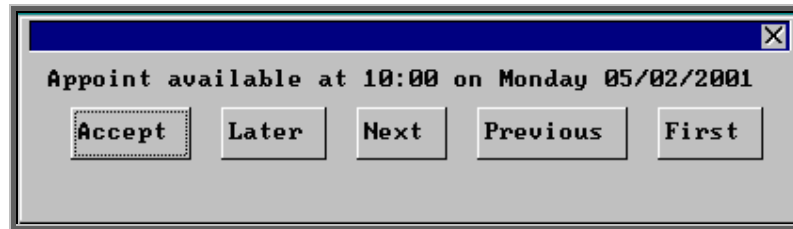
- **Accept.** If you are happy with the first date/time offered click on the Accept button with the mouse (or type **A**).
- **Later.** If you would like an appointment on the date offered but would like it later in the day click on the Later button with the mouse (or type **L**). If

however, there are no more available appointments on this date you will be offered an appointment on the next date there is availability.

- **Next.** If the first date found is not suitable and you would like to find the next date there are appointments available, click on the **Next** button with the mouse (or type **N**).

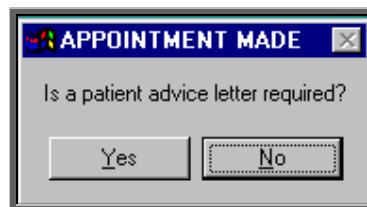
If you wish to abandon finding an appointment press **Esc**.

If you select **Later** and/or **Next** two more options become available.



- **Previous.** Click on **Previous** (or type **P**) to go back to the previous date offered. (i.e. a backwards **Next**)
- **First.** Click on **First** (or type **F**) to go back to the **First** date/time that was offered.

Once you have accepted an appointment slot, you will be asked if you wish a letter to be printed informing the patient of their appointment.



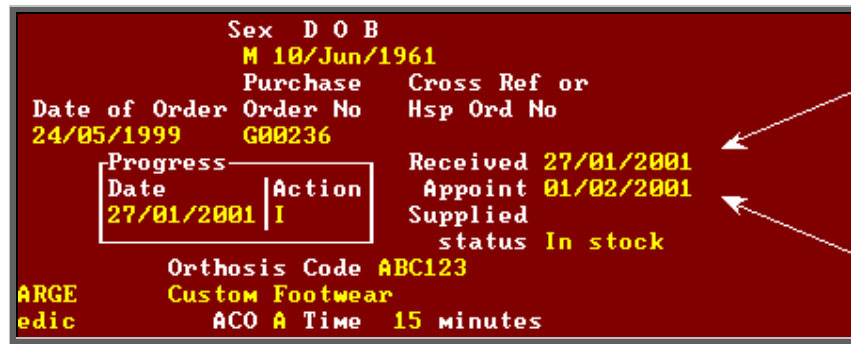
If you select **Yes**, a letter will not print immediately. Letters are printed in batch. ([see Appointments - Note 15. Printing appointment letters](#))

If the patient requires transport (i.e. the *Transport* field on the order is set to anything other than 'No Transport Required') you will be reminded that transport needs to be booked. Click on **OK** to continue.



If you are using the Transport memo available in OPAS, they are also printed in batch (see [Appointments - Note 15. Printing appointment letters](#) and [Appointments - Note 16. Printing transport memos](#)).


Having arranged the appointment you will be returned to the **Order** screen where the *Received* field will have been populated with today's date, the *Appointment* field with the date of the accepted appointment and the *Status* changed from On Order to In Stock.




10. Allocating appointments automatically (via patient record)

Appointments can be made automatically from the **Patient** screen. This is an alternative way of making an appointment when there is not an order (i.e. assessment/review appointment) or if you want to make the appointment before the goods have arrived.

Menu: **Patients**

Find the relevant patient using the 'find' icon  (or Data, Find).

Click on the 'next appointment' icon  (or Appointment, Next), to load the appointment selection screen below. Any text entered in the *Comments* field of the patient record will appear at the top of the selection screen as this may contain information that would be relevant to the appointment that is being made.

The screenshot shows a form with the following fields and labels:

- Next** (Title bar)
- Prefers Mondays** (Red header bar)
- Clinic:** (Label next to a dropdown menu)
- Clinician** (Label)
- Day:** (Label)
- AM/PM:** (Label)
- New:** (Label)
- Duration:** (Label)
- From:** (Label)

The fields below in red **must** be completed. The other fields are optional.

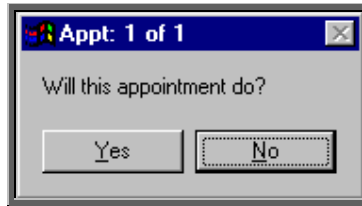
- Clinic** select the clinic venue you wish to make the appointment for (from the pop-up list)
- Clinician** if you have a preference as to which Clinician the patient is seen by then select a Clinician from the pop-up list. If the patient can see any Clinician that has a clinic at the venue selected, then leave this field blank by pressing **Esc** to remove the pop-up list, and then press **Enter** to move to the next field.
- Day** if you have a preference as to which day of the week the patient is seen then select a day from the pop-up list. If the patient can attend any day when there is a clinic at the venue selected, then leave this field blank by pressing **Esc** to remove the pop-up list, and then press **Enter** to move to the next field.
- AM/PM** if you have a preference as to whether the patient is seen in the morning, the afternoon or the evening then enter A for morning, P for afternoon or E for evening. If the patient can be seen any time when there is a clinic at the venue selected, then press **Enter** to leave this field blank and move to the next field.
- This function will only work effectively if your clinic sessions are set up as half-day sessions. All day sessions are classed as AM sessions so you may wish to change any full day sessions you have into two separate sessions (one for the morning and one for the afternoon) so that you can make full use of this functionality.
- New** This is where you can indicate whether the appointment is for a **New** patient, for a **Fitting**, a **Supply** or a **Review**. By entering this information ensures that the relevant field on the appointment screen is completed. This information can be useful for reporting on appointment usage.

Filling in this field can have a secondary use if you have set your sessions to take a limited number of each type of appointment. (see [Appointments - Note 6. Limiting the number of appointments per session](#))

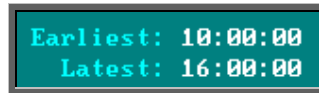
Duration will default to your standard appointment length (as set up in [Utilities – Choices – System](#)) but can be changed to the length of appointment required.

From will default to tomorrows date but can be changed to the date you wish to start looking for available appointments. This is useful when you wish to make a review appointment some time into the future.

Having selected the date you wish to start looking from, the system will look for the first available slot from that date. If the patient already has a future appointment, then you will be shown the existing appointment and asked if it will do, or whether you do need to make another appointment.

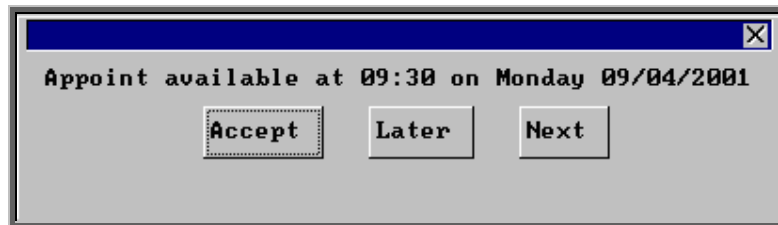


If you do wish to make another appointment, or if there was no existing appointment for the patient, you will be told the first available appointment based on the criteria entered in the appointment selection screen and the information entered in the *Earliest* and *Latest* fields on the patient record.



If times are entered into either or both of these fields, the time of the offered appointment will be restricted accordingly. In the above example, no appointments will be offered before 10am or after 4pm.

Once an appointment has been found the following message box will appear.



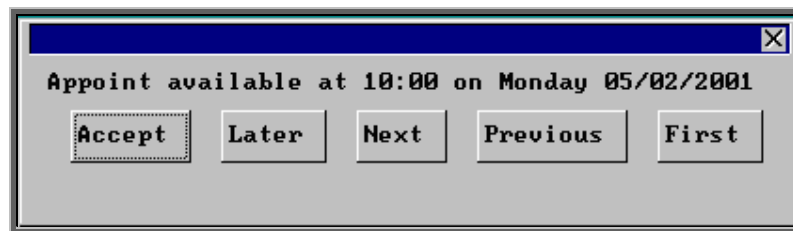
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

When the first available appointment is offered, you initially have 3 options.

- **Accept.** If you are happy with the first date/time offered click on the Accept button with the mouse (or type **A**).
- **Later.** If you would like an appointment on the date offered but would like it later in the day click on the Later button with the mouse (or type **L**). If however, there are no more available appointments on this date you will be offered an appointment on the next date there is availability.
- **Next.** If the first date found is not suitable and you would like to find the next date there are appointments available, click on the Next button with the mouse (or type **N**).

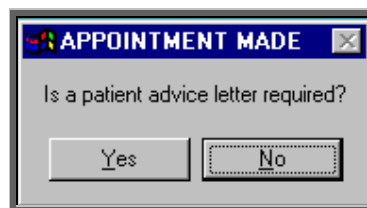
If you wish to abandon finding an appointment press **Esc**.

If you select Later and/or Next two more options become available.



- **Previous.** Click on Previous (or type **P**) to go back to the previous date offered. (i.e. a backwards Next)
- **First.** Click on First (or type **F**) to go back to the First date/time that was offered.

Once you have accepted an appointment slot, you will be asked if you wish a letter to be printed informing the patient of their appointment.



If you select **Yes**, a letter will not print immediately. Letters are printed in batch. ([see Appointments - Note 15. Printing appointment letters](#))

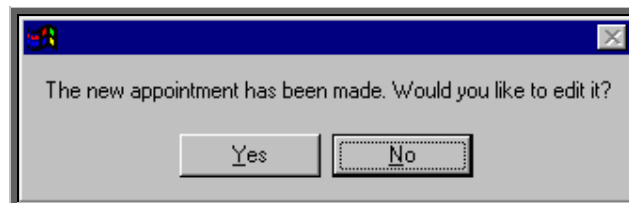
If the patient requires transport (i.e. the *Transport* field on the patient records is set to anything other than 'No Transport Required') you will be reminded that transport needs to be booked. Click on **OK** to continue.



If you are using the Transport memo available in OPAS, they are also printed in batch ([see Appointments - Note 15. Printing appointment letters](#) and [Appointments - Note 16. Printing transport memos](#)).

You will then be given the opportunity to edit the appointment. There are a number of reasons why you may want to do this.

- to allocate a different letter type other than the standard letter
- to change the reason for the appointment from the default entry
- to add additional information in the comments field



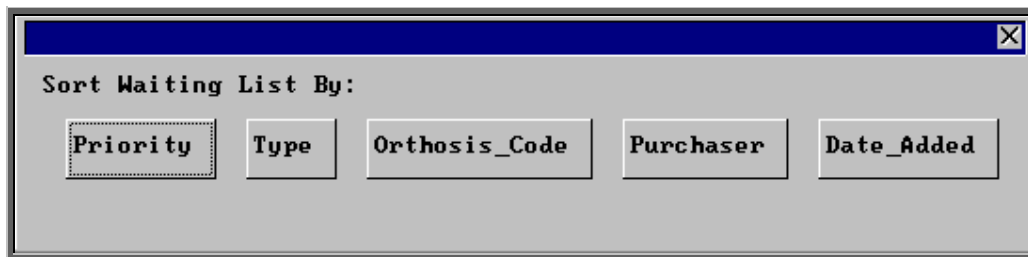
If you do not wish to edit the appointment, click on **No** and you will return to the patient screen. If you do wish to edit the appointment, click on **Yes** to be taken into the appointments screen, where you can make the necessary alterations.

11. Allocating appointments automatically (via waiting list)


Once a patient has been added to the waiting list ([see Patients - Note 23. Waiting list](#)) they can be removed by allocating them an appointment from the **Patient** screen ([see Appointments - Note 10. Allocating appointments automatically \(via patient record\)](#)) or from the **Waiting List** screen.

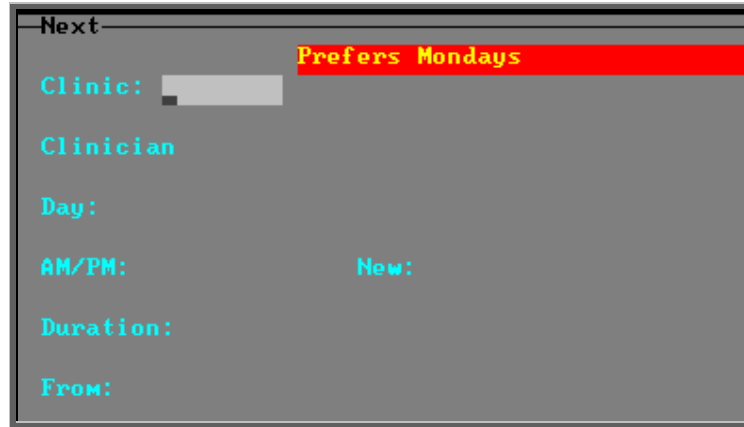
Menu: Appointments – Current – Waiting List

On entering the waiting list you will be asked the order you wish the patients to be listed.



- | | |
|---------------|---|
| Priority | Each patient has a <i>Priority</i> value that is calculated by multiplying the number of days the patient has been on the waiting list by the weighting applied to the type. The patients will be shown in order of <i>Priority</i> with the highest <i>Priority</i> first. Therefore, the first person you will see on entering the screen will be the patient with the highest <i>Priority</i> score. |
| Type | Each patient on the waiting list is allocated a <i>Type</i> e.g. Urgent, Routine. Selecting <i>Type</i> will show all the Urgents together regardless of their <i>Priority</i> score. |
| Orthosis_Code | Selecting <i>Orthosis_Code</i> will show those patients waiting for the same type of orthosis together. |
| Purchaser | Selecting <i>Purchaser</i> will show your patients in Purchaser order showing purchaser 1 first. |
| Date_Added | Selecting <i>Date_Added</i> will show the patients in the order they were entered onto the waiting list with the patient who has been on the longest being shown first. |

Having found the patient on the waiting list that you wish to make an appointment for, click on the 'next appointment' icon  (or **A**ppoint), to load the appointment selection screen below. Any text entered in the *Comments* field of the patient record will appear at the top of the selection screen as this may contain information that would be relevant to the appointment that is being made.



The fields below in red **must** be completed. The other fields are optional.

Clinic select the clinic venue you wish to make the appointment for (from the pop-up list)

Clinician if you have a preference as to which Clinician the patient is seen by then select a Clinician from the pop-up list. If the patient can see any Clinician that has a clinic at the venue selected, then leave this field blank by pressing **Esc** to remove the pop-up list, and then press **Enter** to move to the next field.

Day if you have a preference as to which day of the week the patient is seen then select a day from the pop-up list. If the patient can attend any day when there is a clinic at the venue selected, then leave this field blank by pressing **Esc** to remove the pop-up list, and then press **Enter** to move to the next field.

AM/PM if you have a preference as to whether the patient is seen in the morning, afternoon or evening, then enter **A** for morning, **P** for afternoon or **E** for evening. If the patient can be seen any time when there is a clinic at the venue selected, then press **Enter** to leave this field blank and move to the next field.

This function will only work effectively if your clinic sessions are set up as half-day sessions. All day sessions are classed as AM sessions so you may wish to change any full day sessions you have into two separate sessions (one for the morning and one for the afternoon) so that you can make full use of this functionality.

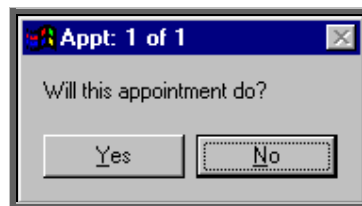
New This is where you can indicate whether the appointment is for a **New** patient, for a **Fitting**, a **Supply** or a **Review**. By entering this information ensures that the relevant field on the appointment screen is completed. This information is useful when reporting on appointment usage.

Filling in this field can also have a secondary use if you have set your sessions to take a limited number of each type of appointment. (see [Appointments - Note 6. Limiting the number of appointments per session](#))

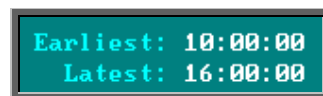
Duration will default to your standard appointment length (as set up in [Utilities – Choices – System](#)) but can be changed to the length of appointment required.

From will default to tomorrows date but can be changed to the date you wish to start looking for available appointments. This is useful when you wish to make a review appointment some time into the future.

Having selected the date you wish to start looking from, the system will look for the first available slot from that date. If the patient already has a future appointment, then you will be shown the existing appointment and asked if it will do, or whether you do need to make another appointment.

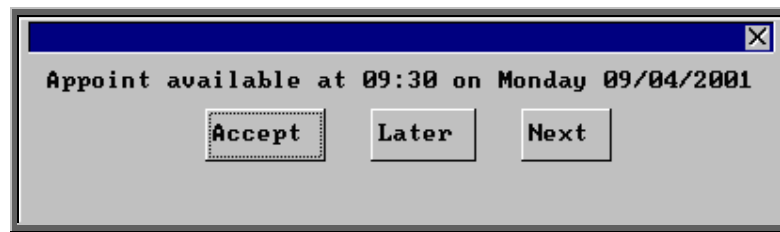


If you do wish to make another appointment, or if there was no existing appointment for the patient, you will be told the first available appointment based on the criteria entered in the appointment selection screen and the information entered in the *Earliest* and *Latest* fields on the patient record.



If times are entered into either or both of these fields, the time of the offered appointment will be restricted accordingly. In the above example, no appointments will be offered before 10am or after 4pm.

Once an appointment has been found the following message box will appear.



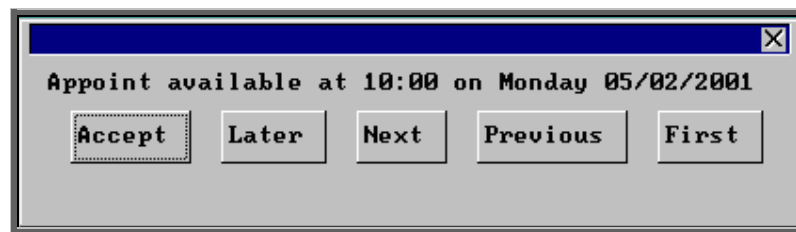
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

When the first available appointment is offered, you initially have 3 options.

- **Accept.** If you are happy with the first date/time offered click on the Accept button with the mouse (or type **A**).
- **Later.** If you would like an appointment on the date offered but would like it later in the day click on the Later button with the mouse (or type **L**). If however, there are no more available appointments on this date you will be offered an appointment on the next date there is availability.
- **Next.** If the first date found is not suitable and you would like to find the next date there are appointments available, click on the Next button with the mouse (or type **N**).

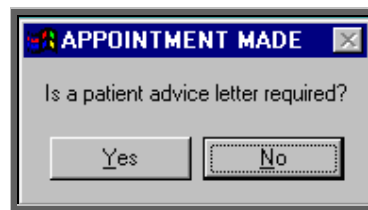
If you wish to abandon finding an appointment press **Esc**.

If you select Later and/or Next two more options become available.



- **Previous.** Click on Previous (or type **P**) to go back to the previous date offered. (i.e. a backwards Next)
- **First.** Click on First (or type **F**) to go back to the First date/time that was offered.

Once you have accepted an appointment slot, you will be asked if you wish a letter to be printed informing the patient of their appointment.



If you select **Yes**, a letter will not print immediately. Letters are printed in batch. (see [Appointments - Note 15. Printing appointment letters](#))

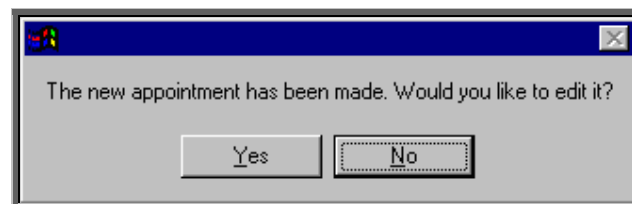
If the patient requires transport (i.e. the *Transport* field on the patient records is set to anything other than 'No Transport Required') you will be reminded that transport needs to be booked. Click on OK to continue.



If you are using the Transport memo available in OPAS, they are also printed in batch (see [Appointments - Note 15. Printing appointment letters](#) and [Appointments - Note 16. Printing transport memos](#)).

You will then be given the opportunity to edit the appointment. There are a number of reasons why you may want to do this.

- to allocate a different letter type other than the standard letter
- to change the reason for the appointment from the default entry
- to add additional information in the comments field





If you do not wish to edit the appointment, click on **No** and you will return to the patient screen. If you do wish to edit the appointment, click on **Yes** to be taken into the appointments screen, where you can make the necessary alterations.

12. Amending an appointment

Finding the Appointment to be amended

To amend an appointment, you first need to find the appointment you wish to amend. There are three ways to find a specific appointment. These are listed below, with the quickest method first.

- a) **Patients.** Find the patient record and then click on the ‘appointment’ icon  (or Appointments, Current)
- b) **Appointments – Current – Sessions.** Go to the session the appointment is for and select Appointments, Maintain.
- c) **Appointments – Current – Appointments.** Find the appointment by searching on the patient’s hospital number.

Having found the appointment you wish to amend, click on the ‘update’ icon  (or Edit, Uppdate).

The following fields may be updated.

Duration

Advised

(entering a date in here will stop an appointment letter being printed – taking the date out will enable the letter to be printed again)

Referral

Cons

New

Purchaser

Full and Partial

Letter

Type

Notes

Comments

Events

Care Episode

Order

Outcome

Transport Booked

(entering a date in here will stop the transport memo being printed – taking the date out will enable the memo to be printed again)

Reminder


(entering a date in here will stop a reminder letter being printed – taking the date out will enable the letter to be printed again)

The patient cannot be amended. If you wish to offer the appointment time to another patient, the original appointment should be cancelled, and another one made for the new patient.


13. Cancelling appointments

Finding the Appointment to be cancelled

To cancel an appointment, you first need to find the appointment you wish to cancel. There are three ways to find a specific appointment. These are listed below, with the quickest method first.

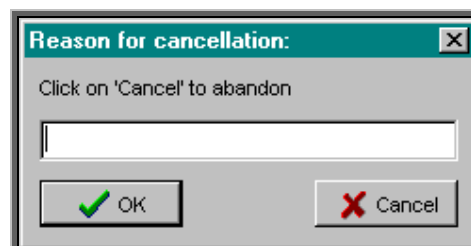
- a) **Patients.** Find the patient record and then click on the 'appointment' icon  (or Appointments, Current)
- b) **Appointments – Current – Sessions.** Go to the session the appointment is for and select Appointments, Maintain.
- c) **Appointments – Current – Appointments.** Find the appointment by searching on the patient's hospital number.

Cancelling the Appointment

1. Having found the appointment you wish to cancel, click on the 'cancel' icon  (or Cancel).

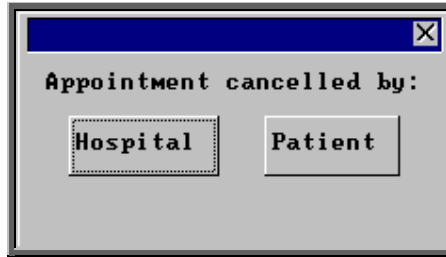


2. You will be asked to confirm that you do want to cancel the appointment. Click on **Yes** to continue. The appointment will be cancelled and the allocated time made available once more so it can be offered to other patients.
3. You will then be asked to enter the reason for cancelling.



Type in the reason (or leave blank if you wish to) and click on **OK** to continue.

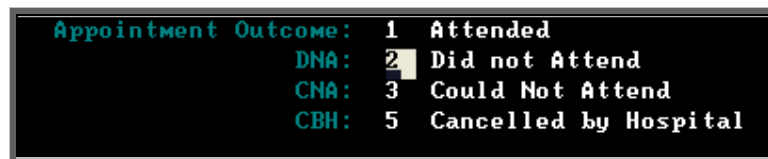
4. After you have entered the reason for the cancellation, you will be asked whether the Hospital or Patient cancelled the appointment.



- If Patient is selected the *Outcome* field on the appointment will be automatically populated with Could not Attend.
- If Hospital is selected the *Outcome* field on the appointment will be automatically populated with Cancelled by Hospital.

In order for this to work you must ensure that the two outcomes are set up in **Utilities – Choices – Appointment – Appointment Outcome**. The Could not Attend outcome should already exist, but you may need to add a new outcome of Cancelled by Hospital. (For how to add appointment outcomes see [Utilities - Note 2. Choices - Appointment](#))

Once the two outcomes have been defined, they need to be entered into the system parameter screen. Select **Utilities – Choices – System** and press the **Pg-Dn** key. Enter the relevant outcome reference numbers next to the *CNA:* and *CBH:* lines.



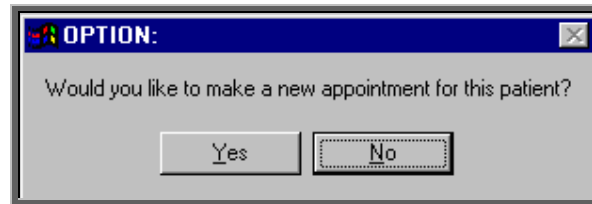
5. If transport was required, you will be told so that the arrangements with the ambulance service can be cancelled.



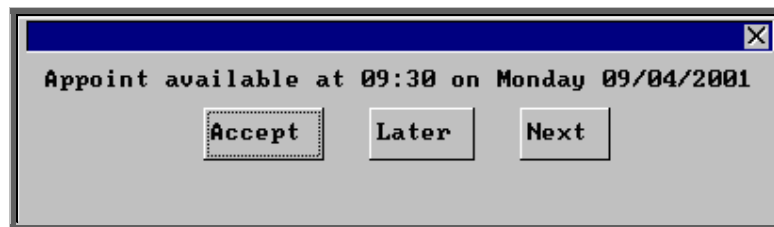
Warning. Cancelled appointments cannot be un-cancelled. If an appointment is cancelled be mistake you will need to make the appointment again.

Making a Replacement Appointment

Once the appointment has been cancelled, you will be asked if you would like to make a new appointment for the patient.



If you select Yes, OPAS will search for the next available appointment, looking at appointment dates 7 days before the cancelled appointment or from tomorrow's date (whichever is the later). You will be offered a new date/time that is for the Venue and Clinician that the original appointment was for. If the appointment relates to an order where you specified the day the appointment needed to be on, then only appointments for that day will be offered.



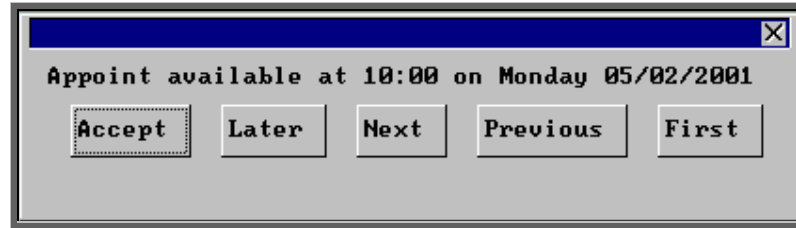
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

When the first available appointment is offered, you initially have 3 options.

- **Accept.** If you are happy with the first date/time offered click on the Accept button with the mouse (or type **A**).
- **Later.** If you would like an appointment on the date offered but would like it later in the day click on the Later button with the mouse (or type **L**). If however, there are no more available appointments on this date you will be offered an appointment on the next date there is availability.
- **Next.** If the first date found is not suitable and you would like to find the next date there are appointments available, click on the Next button with the mouse (or type **N**).

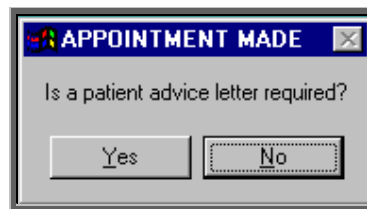
If you wish to abandon finding an appointment press **Esc**.

If you select Later and/or Next two more options become available.



- **Previous.** Click on Previous (or type **P**) to go back to the previous date offered. (i.e. a backwards Next)
- **First.** Click on First (or type **F**) to go back to the First date/time that was offered.

Once you have accepted an appointment slot, you will be asked if you wish a letter to be printed informing the patient of their appointment.



If you select **Yes**, a letter will not print immediately. Letters are printed in batch. ([see Appointments - Note 15. Printing appointment letters](#))

If the patient requires transport, you will be reminded that transport needs to be booked. Click on **OK** to continue.



If you are using the Transport memo available in OPAS, they are also printed in batch ([see Appointments - Note 15. Printing appointment letters](#) and [Appointments - Note 16. Printing transport memos](#)).

You will then be given the opportunity to edit the appointment. There are a number of reasons why you may want to do this.

- to allocate a different letter type other than the standard letter
- to add additional information in the comments field




Note: The appointment information that was entered when the original appointment was created will be copied into the new appointment e.g. Notes, Order number etc

If you do not wish to edit the appointment, click on **NO**. If you do wish to edit the appointment, click on **Yes** to be taken into the appointments screen, where you can make the necessary alterations.

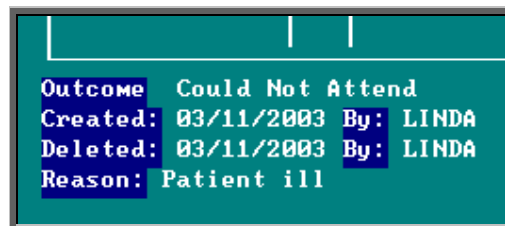
Recording Cancelled Appointments

When an appointment has been cancelled a note is automatically entered on the patient record giving the details of the cancelled appointment. Looking at the note in full

(clicking on the 'note' icon  (or Goto, Notes)) will show why the appointment was cancelled and by whom.

All patient notes MUST be treated as confidential		
Medical Notes		
Date	Notes	Category
03/11/2003	Appt cancelled. Session: 1919 @ 10:00 on 01/12/2003	Audit
04/12/1997	Diabetic	

Also, the appointment that was cancelled will show why the appointment was cancelled.



Also, within the system parameters (**Utilities – Choices – System**) there is an option that can be set to either **Keep** or **Remove** cancelled appointments. If this parameter is set to **Remove**, all references to the cancelled appointment will be removed. The only evidence of the cancelled appointment is the note that is automatically entered on the patient record (see above), and in **Appointments – Current/Archived - Appointments**. If the parameter is set to **Keep**, the cancelled appointment will stay on the session screen and patient record, but will be highlighted in red so that it is clear that it has been cancelled. It will also stay on the clinic list, but marked as cancelled.

Appointments				
Date:	Day	Time:	At:	With:
28/03/2001	Wed	10:00	Appliance Department	Mrs Orthotiste
03/04/2001	Tue	09:30	Appliance Department	Mr Orthotist


However, whether the parameter is set to **Remove** or **Keep**, when an appointment is cancelled, that appointment time becomes available again so that another patient can be offered it. Cancelled appointments will also be taken into the archive when run, so that they can be incorporated into reports.

14. Printing clinic lists

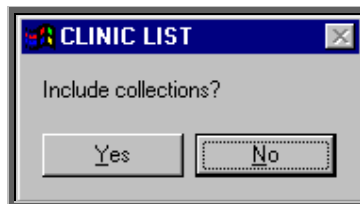
Clinic lists can be printed individually or in batch. The layout of the clinic list can be customised to suit your requirements, but there is a standard report already created for you.

Printing individual clinic lists.

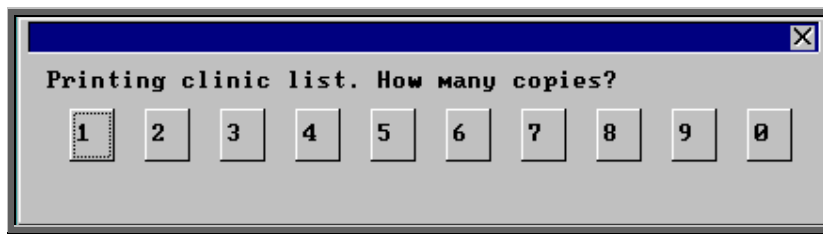
Menu: **Appointments – Current – Sessions**

Find the session that you wish to print and click on the 'print' icon  (or **F**ile, **P**rint) and select **L**ist from the drop down menu.

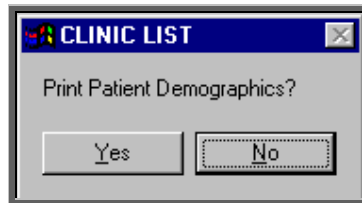
You will be asked if you wish those patients expected to collect items to be printed at the bottom of the clinic list (i.e. those patients who appear on the session screen as they have been notified to collect items)



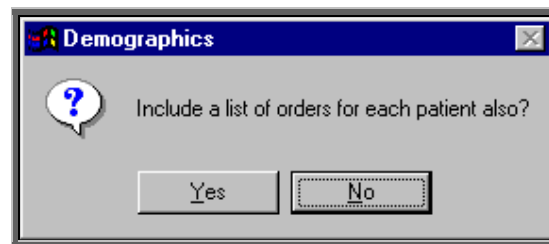
You can then select how many copies of the clinic list are required. If you wish to abandon printing the clinic list select 0.



If required, you can then print Patient Demographics for each patient on the clinic list. Patient Demographics produces the same report as printing Patient Information from the Patient screen (see Patients - Note 7. Printing Options).



If Yes is selected to the Patient Demographics, you will then be asked if you would also like a printed list of each patient's orders also.

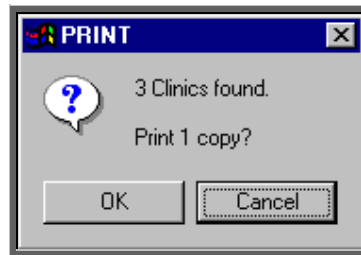


Printing clinic lists in batch.

Menu: Appointments – Print – Clinic Lists



- Venue* if you want to print clinic lists for all venues between the date ranges specified leave this field blank (by pressing the **Esc** key when the available options are offered), else make your selection.
- Clinician* if you want to print clinic lists for all Clinicians between the date ranges specified leave this field blank (by pressing the **Esc** key when offered the available options), else make your selection.
- Start Date* enter the start date for the range you wish to print
- End Date* enter the end date for the range you wish to print
- Collections* enter Y for Yes and N for No
- Copies* state how many copies of the clinic list you require



You will then be told how many sessions have been found within the date range and you will be asked to confirm that you wish to continue. Choose OK to continue and print the lists or choose Cancel to escape from the option.

N.B. Using this facility will not give you the option to print patient demographics or order lists. That option is only available when printing single clinic lists from the **Session** screen.

15. Printing appointment letters

There are a number of ways of printing appointment letters. Which method you use will be determined by which letters need to be printed. Option 1 is the preferred method as this will print all appointment and collection letters that are waiting to be printed. Option 2 looks at printing those appointment and collection letters outstanding on a particular session, and Option 3 looks at how to print individual appointment or collection letters for a specific patient.


Option 1. Printing all outstanding appointment/collection letters.

Menu: Appointments – Print – Letters

This option is used to print both appointment and collection letters.

On entering the **Letters** screen you will be shown a record for each letter that still requires to be printed (i.e. the advised field is blank and the appointment date is in the future). If there are not any letters waiting to be printed, the message box below will appear instead.



To print the letters click on the 'auto-print' icon  (or **A**uto-print). This will then print all the letters that are eligible for printing. The advised field on the appointment will be populated with today's date so that you know when the letter was produced and to prevent the letter showing in the **Letters** screen in future.

If there are not any letters produced, the following message box will appear, which explains the possible reasons why.




You cannot make an appointment for a patient that is marked as deceased, but this will stop a letter being printed if the patient was marked as deceased between making the appointment and printing the letter


There are 26 different types of appointment and collection letters. Within the user screen you can set up which letters will print for each user when using auto-print ([see Utilities - Note 55. Users](#))

If you need to reprint an appointment letter, find the relevant appointment and simply remove the date from the *Advised* field (using **E**dit, **U**ppdate). Then select **A**ppointments – **P**rint – **L**etters and run **A**uto-print again.

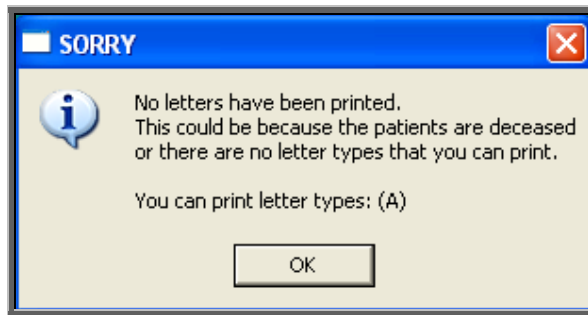
Option 2. Printing outstanding appointment/collection letters for a session.

Menu: Appointments – Current – Sessions

Find the session required and click on the ‘letters’ icon  (or Letters).

To print the letters click on the ‘auto-print’ icon  (or Auto-print). This will then print all the letters that are eligible for printing. The advised field on the appointment will be populated with today’s date so that you know when the letter was produced and to prevent the letter showing in the **Letters** screen in future.

If there are not any letters produced, the following message box will appear, which explains the possible reasons why.



You cannot make an appointment for a patient that is marked as deceased, but this will stop a letter being printed if the patient was marked as deceased between making the appointment and printing the letter


There are 26 different types of appointment and collection letters. Within the user screen you can set up which letters will print for each user when using auto-print ([see Utilities - Note 55. Users](#))



When printing appointment letters from the **Sessions** screen, this message box will also appear if there are no outstanding appointment letters for this session (i.e. they have already been printed).


If you need to reprint an appointment letter, find the relevant appointment and simply remove the date from the *Advised* field (using Edit, Uppdate) and run the Autoprint option again.

Option 3. Printing individual appointment/collection letter for a patient.

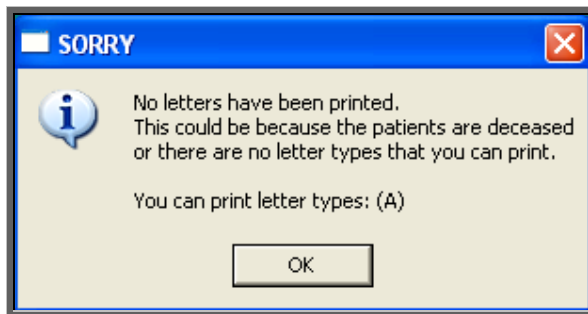
Menu: Patients

Find the patient whose appointment letter you wish to print and click on the ‘appointment’ icon  (or Appointments, Current).

Now click on the 'letters' icon  (or Letters). Use the 'arrow' icon  (or **F6**) to move to the required appointment if necessary. (If you need to reprint an appointment letter, simply remove the date from the *Advised* field (using Edit, Udate) first)

To print the letter click on the 'auto-print' icon  (or Auto-print). The advised field on the appointment will be populated with today's date so that you know when the letter was produced and to prevent the letter showing in the **Letters** screen in future.

If there are not any letters produced, the following message box will appear, which explains the possible reasons why.



You cannot make an appointment for a patient that is marked as deceased, but this will stop a letter being printed if the patient was marked as deceased between making the appointment and printing the letter

There are 26 different types of appointment and collection letters. Within the user screen you can set up which letters will print for each user when using auto-print ([see Utilities - Note 55. Users](#))


16. Printing transport memos

There are three options available for printing transport memos.

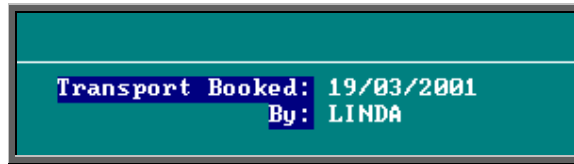
Option 1

Menu: **Appointments – Print – Letters**

If you are in the **Letters** screen printing appointment and collection letters, then you

can use the 'transport' icon  (or Transport) to print the transport memos.

Once the memos have been printed, OPAS will enter today's date in the *Transport Booked:* field and the name of the person who printed them in the *By:* field.




Option 2

Menu: **Appointments – Print – Transport**

If you only want to print transport memos, you may choose to use this option instead. The **Transport** screen will show all those appointments that require transport, where the transport memo has not yet been printed and the appointment date is in the future.

If there are no transport memos waiting to be printed, the message box below will appear instead.



To print the transport memos, click on the ‘transport’ icon  (or Transport).



Once the memos have been printed, OPAS will enter today’s date in the *Transport Booked:* field and the name of the person who printed them in the *By:* field.


Option 3

Menu: **Patients**

If you want to print one transport memo for a specific patient, find the patient and

click on the ‘appointment’ icon  (or Appointments, Current).

Now click on the ‘letters’ icon  (or Letters). Use the ‘arrow’ icon  (or **F6**), if necessary, to move to the appointment the transport memo is for. (If you need to reprint a transport memo, simply remove the date from the *Transport Booked* field (using Edit, Update) first)

To print the transport memo, click on the ‘transport’ icon  (or Transport).

17. Updating appointment outcome/ logging attendance times

Once a clinic has finished, you have the ability to update the appointment to show whether the patient attended their appointment, and also to record what time they arrived and were seen.

Updating Appointment Outcome

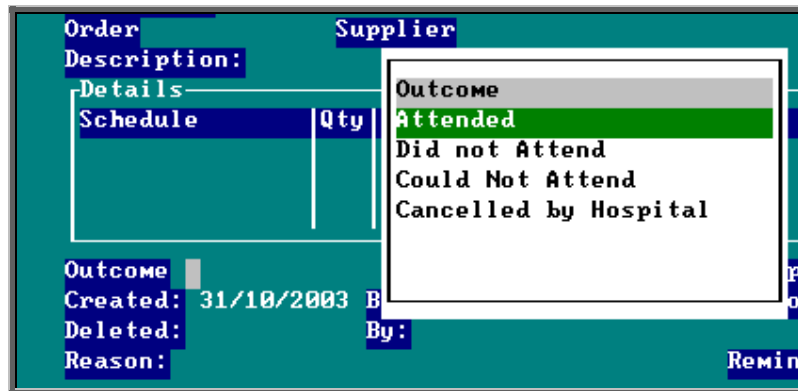
Updating appointment outcome has two benefits. Firstly, it enables statistical information to be produced showing not only how many appointments occurred over a particular period, but also how many of those were attended. Secondly, it enables OPAS to keep track of those people who are not attending their appointments, so that the information can be displayed on the **Patient** screen and also in the **DNA** screen where letters can be automatically generated (see [Appointments - Note 21. Printing DNA letters](#)).

Menu: **Appointments – Current – Sessions**

Find the session that is to be updated, and select **Maintain** from the options above the icons. You will now be able to see an appointment screen for each patient that has an appointment at that clinic.

Click on the option **Log** above the icons, and select **Outcomes**.

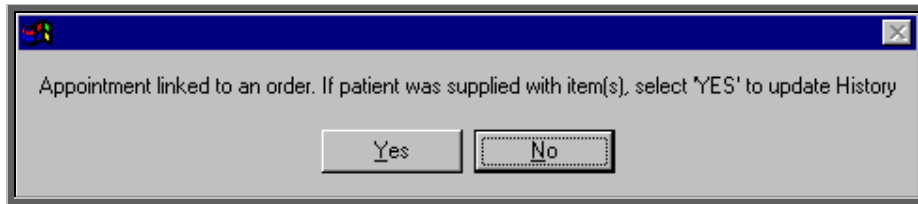
You will be taken straight into the *Outcome* field. A pop-up list will appear for you to select from.



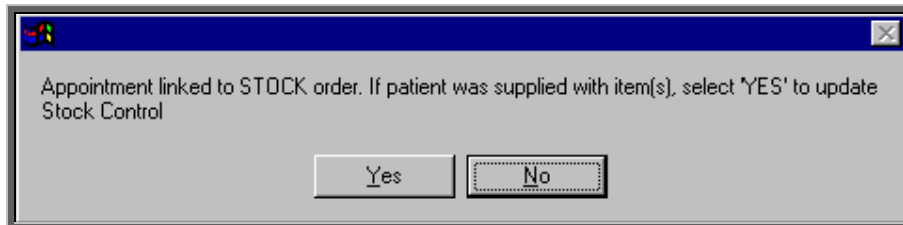
We have set four outcomes up for you to choose from; **Attended**, **Did not Attend**, **Could not Attend** and **Cancelled by Hospital**. You can set up more options if necessary in **Utilities – Choices – Appointment Outcome**.

Make your selection and either press **Enter**. You will then be automatically taken to the *Outcome* field of the next patient with an appointment at that clinic. Make your selection again from the pop-up list. Continue to do this until all the appointments have been logged. Once the last appointment has been logged, you will be taken out of logging mode so that you can come out of the screen. If you wish to stop logging before you reach the last patient, press **Esc** to remove the *Outcome* pop-up list and then click anywhere on the screen with the **right** mouse button and you will be taken out of logging mode.

If you log an appointment with an outcome of **Attended** and there is an order linked to the appointment, you will be asked if you wish the *Supplied* field on the order be updated with today's date.

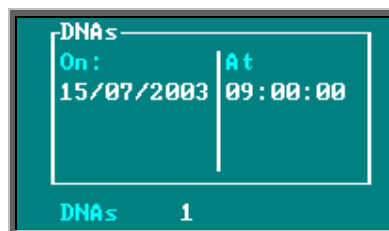


If the order linked to the appointment is a stock order, you will be asked if you wish the *Supplied* field on the order be updated with today's date **and** the stock control system be updated



If you update an appointment with an outcome of **Did not Attend** or **Could not Attend** you will be asked if you would like to make a new appointment for the patient. If you select **Yes**, OPAS will search for the next available appointment, looking at appointment dates 7 days before the original appointment or from tomorrow's date (which ever is the later). You will be offered a new date/time that is for the Venue and Clinician that the original appointment was for. If the appointment relates to an order where you specified the day the appointment needed to be on, then only appointments for that day will be offered.

Also, when an appointment is updated with an outcome of **Did not Attend**, the date and time of the appointment will appear in a table in the bottom left corner of the **Patient** screen.



Logging patient attendance

Logging the time that the patient Arrived, was Seen and Departed, updates the appointment with an outcome of Attended, but also enables the appointment data to be analysed to see if your patients are being seen within half an hour of their appointment time (re Patients Charter).

Menu: Appointments – Current – Sessions

Find the session that is to be updated, and select Maintain from the options above the icons. You will now be able to see an appointment screen for each patient that has an appointment at that clinic.

Click on the option Log above the icons.

Times can be logged individually as patients arrive, are seen and depart. Or, alternatively, all three times can be logged at once if you are updating the appointments after the clinic has finished.

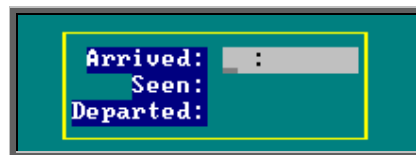
Arrived select to enter the time the patient arrived for their appointment. The current time will appear at the bottom of the screen. This can be amended if necessary, and press **Enter** to accept.

Seen select to enter the time the patient was seen. The current time will appear at the bottom of the screen. This can be amended if necessary, and press **Enter** to accept.

Departed select to enter the time the patient left. The current time will appear at the bottom of the screen. This can be amended if necessary, and press **Enter** to accept.

Entering a Departed time will update the *Outcome* of the appointment to **Attended**.

All select to enter all (or more than one) of the times in one step.

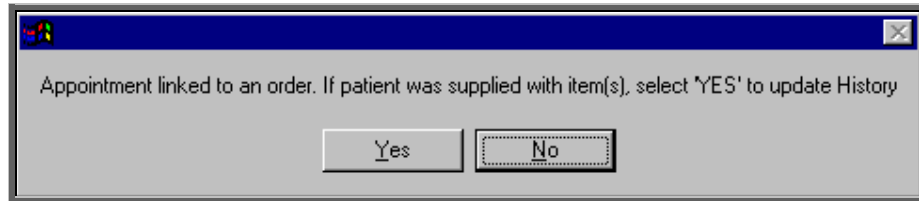


The cursor will move into the log box where you can enter the Arrived, Seen and Departed times. If you do not wish to enter a time in one of these fields, simply press the **Enter** key to move to the next field.

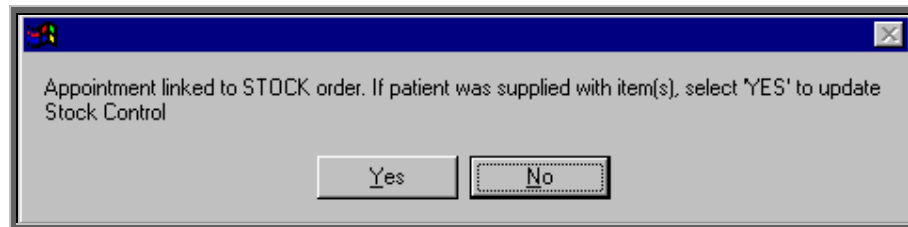
Once the Departed field has been entered, you will then be automatically taken to the next patient with an appointment at that clinic. Enter the

times for the next patient and continue to do this until all the appointments have been updated. Once the last appointment has been logged, you will be taken out of logging mode so that you can come out of the screen. If you wish to stop logging before you get to the last patient, click anywhere on the screen with the **right** mouse button and you will be taken out of logging mode.

If there is an order linked to the appointment and you enter a *Departed*: time (either using *D*eparted or *A*ll), you will be asked if you wish the *Supplied* field on the order be updated with today's date.



If the order linked to the appointment is a stock order, you will be asked if you wish the *Supplied* field on the order be updated with today's date **and** the stock control system be updated



18. Auditing appointments

On the appointment screen there is a field called *Event*:. The purpose of this field is to categorise the type of appointment and against each category allocate set questions and possible responses to be completed after the patient has been seen.

E.g. an event of First Fitting could have a question of 'Did the orthosis fit?' with possible answers of Yes, No – Too small, No – Too big. (I realise this is a very simplistic example but I hope you get the idea.)


Each event can have multiple questions, and questions can have multiple answers.

To use the *Event* field, you first have to set up the Events, Questions and Responses.

It is best to document what you want to set up before you begin entering them into OPAS because the quickest way is to enter the Questions and Responses before entering the Events.

1. Setting up the Questions

Menu: **Utiilites – Choices – Appointment – Questions**


Click on the 'enter' icon  (Edit, Enter).

Question type in the question

Continue until all the questions have been entered.

2. Setting up the Responses

Menu: **Utiilites – Choices – Appointment – Responses**

Click on the 'enter' icon  (Edit, Enter).


Response type in the reponse

Score enter a score if appropriate (each response can carry a score to indicate the level of satisfaction of the answer)

Continue until all the reponses have been entered.

3. Setting up the Events

Menu: **Utiilites – Choices – Appointment – Events**

Click on the 'enter' icon  (Edit, Enter).

Event type in the event


Question select the first relevant question for the event from the pop-up list of questions

Many enter 0 (Zero) if only one response can be selected
enter 1 (one) if multiple responses can be selected

Continue to select all the questions relevant for the event. When you have finished, press **Esc** to make the question pop-up list dissappear and then press **Ctrl-Enter** to save.

Having defined which questions relate to the event, we now need to define which responses can be offered to those questions selected.

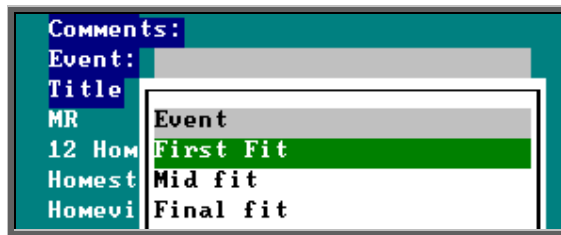
Click on the word Questions above the icons.

Click on the 'enter' icon  (Edit, Enter).

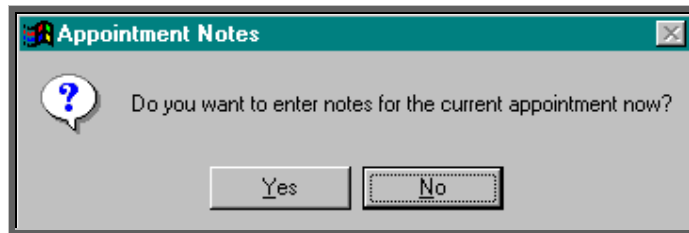
Response select all the relevant responses required for this question. When you have finished, press **Esc** to make the response pop-up list disappear and then press **Ctrl-Enter** to save.

4. Using the Event field

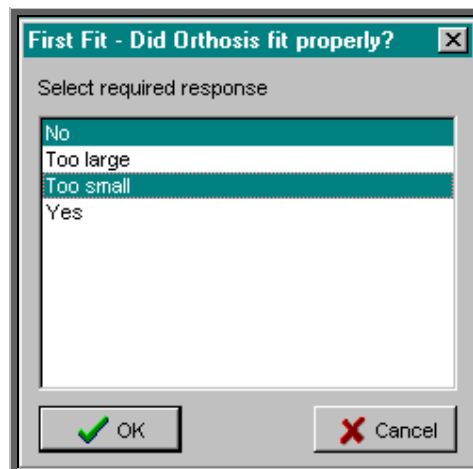
When making an appointment, select the appropriate *Event* from the pop-up list.



Once the patient has been seen, find the appointment and click on the word Audit above the icons and then select Create.



If you select Yes, the first question will appear.



If, when the question was created (in step 2), multiple responses were allowed, you will be able to highlight more than one response before selecting OK to continue.

Each question will be put to you, in the order that they were created in the **Event** screen (see step 3).

The questions and the responses given can be viewed at anytime by finding the appointment and clicking on the word **A**udit above the icons and then selecting **V**iew.


19. Archiving sessions

To keep the Appointment module of OPAS operating efficiently, it is necessary to regularly archive your old appointments. Depending how many clinics you hold a week, and how fast your computer is will determine how regularly this needs to be done, but we recommend that sessions be archived at least on a monthly basis. Once they are archived you can still see details of the appointments in the **Patients** record or in **Appointments – Archived**. Note: Some of the appointment reports require the appointments to be archived.

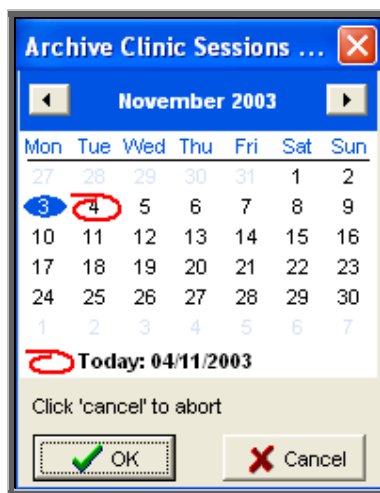
You must be the only user in OPAS when archiving sessions, so ensure everybody is logged off first. (**Utilities – Who** will tell you who is currently using OPAS)

Menu: **Appointments – Current – Sessions**

When you are asked the date of the session required press **Enter** as it does not matter which session you are in when the archive is run. It also does not matter whether you are in the **FULL** or **FAST** version of the **Sessions** screen.

Once you are in the **Sessions** screen, click on the 'archive' icon  (or **Appointments, A**rchive).

A calendar will appear in the middle of the screen for you to select the date you wish to archive up to. Yesterdays date will automatically be highlighted, but this can be changed to any date in the past. (Sessions in the future cannot be archived.) Click on **OK** to continue.



OPAS will now start to archive all the session and their associated appointments up to the date entered. If this task is performed regularly it will only take a short while (no longer than a couple of minutes). When the archive is complete the icons at the top of the screen will reappear.


20. Printing reminder letters

OPAS will keep a track on those appointments that were made more than 6 weeks in advance so that reminder letters can be sent nearer the appointment date. This will hopefully reduce the number of patients that fail to attend review appointment because they either forgot or lost their original appointment letter.

Menu: **Appointments – Print – Reminders**

The **Reminders** screen will show you details of those appointments where 6 weeks have passed since the patient was sent their original appointment letter and it is now only 1-3 weeks away from the appointment date. (Contact the OPAS Helpdesk if you need to change these parameters)



To print the letters click on the 'auto-print' icon  (or **A**uto-print). This will then print all the letters that are eligible for printing. Just as there are 26 appointment letters, so there are 26 different reminder letters. If the patient was originally sent appointment letter A (LETTERA) they will be sent reminder letter A (REMINDA), appointment letter B (LETTERB) then reminder letter B (REMINDB) etc.

You will then be asked if you would like Transport memos to be reprinted for those appointments that require transport. If you want to reprint the Transport memos, click on **Yes**, otherwise select **No**.

Once the letters are printed (and transport memos if requested), the *Reminder* field on the appointment will be populated with today's date so that you know when the letter was produced and to prevent the letter showing in the **Reminders** screen in future.

If there are no reminders due to be sent, the following message will appear when the **Reminders** option is selected.



21. Printing DNA letters

When a patient does not attend an appointment, you may wish to send a letter to the patient, the referrer, and/or their GP. OPAS has automated this process for you so that you can quickly and easily send out pre-defined letters regarding DNA's.

a) Setting up the system parameters for your requirements

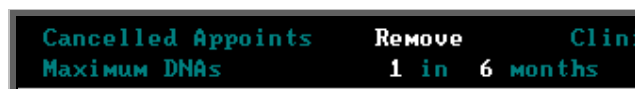
Menu: **Utilities – Choices – System**

In the system parameters you need to tell OPAS

- how many DNA's a patient is allowed before a letter is sent
- and
- over what time scale

e.g. you may wish to send DNA letters if they DNA twice over a 6 month period. This would mean that if they DNA'd on the 1 Feb 2000 and then again on 1 Sep 2000 they would not get a letter. However, if they then DNA'd again on 1 Nov 2000 they would get a letter.

Once you have decided on the ruling you want to apply to DNA letters move down the system parameter screen and enter your criteria e.g. 1 in 6 months for the above example.



b) Setting up the DNA letters

Menu: **Utilities – Choices – Letters**

There are 3 different types of DNA letters available. For each type of DNA letter there are 26 templates. These may need to be amended to your required format/wording.

- | | | |
|----|---------|-----------------------------|
| 1) | DNA_CON | the letter for the referrer |
| 2) | DNA_GP | the letter for the GP |
| 3) | DNA_PAT | the letter for the patient |

Find the first DNA letter that you wish to use. Note: the letters are listed in alphabetical order.

Once you have highlighted the relevant letter click on the ‘paper and pencil’ icon



(or WP) to see the letter. If you wish to edit the letter, click on the ‘four



coloured squares’ icon (or Wordprocessor). The data fields are already there, but you need to add your own wording of the letter. (see [Utilities - Note 23. Choices - Letters](#)) on word processing functions)

To come out of the letter once you have finished, click on the ‘exit’ icon



(or

File, Exit), and then click on the ‘exit with a question mark’ icon



(or

Return). You will be asked if you wish to save the current document. If you are happy with the changes that you have made then choose Yes. If you want to leave the letter as it was when you first opened it then choose No.

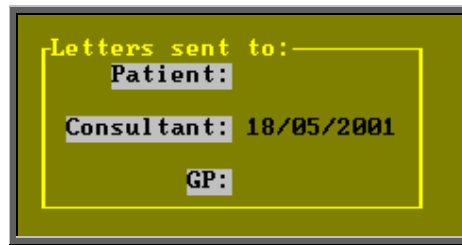
Follow the steps above to edit all the DNA letters you intend to use.

Note. If you would rather, send the required letter layouts to the Helpdesk, and they will set them up for you.

c) Printing the DNA letters

Menu: **Appointments – Print – DNAs**


This will show all the patients that have broken the DNA rule (using the criteria defined in the system parameters – see step (a) above). Some of these patients may already have had DNA letters sent. The *Letters sent to* box would indicate if any letters have been produced, and when.




The patient who most recently broke the rule will be shown first.

Each DNA has a letter template associated to it. Which letter template is allocated can be set up in **Utilities – Choices – Defaults** (see [Utilities - Note 8. Choices - Defaults](#)). This gives you the ability to select different letter templates for different purchasers for example.

If you wish to change the letter template selected for a particular patient, find the

DNA record for that patient and click on the 'letters' icon  (or Letters). Then choose the appropriate letter template from the list at the bottom of the screen. The list of *Letter Types* will only contain those that you are eligible to print (see [Utilities - Note 55. Users](#)).

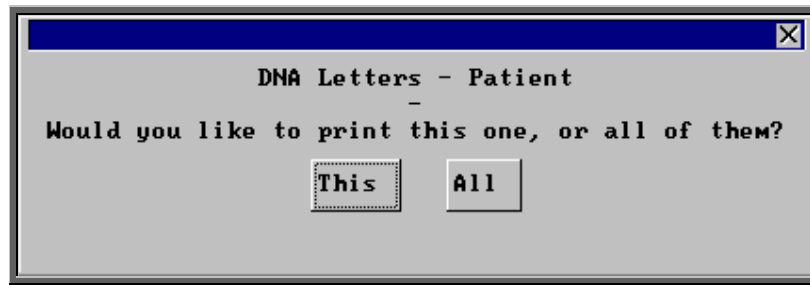


Click on the 'print' icon  (or File, Print) to access the print menu.

Select whom the DNA letter is to be sent to.



You will then be asked if you want this letter to be printed for all those who qualify for that DNA letter who have not had one sent yet, or just for the patient you are looking at on the screen now.



Select This or All as appropriate or press the **Esc** key if you wish to abandon the option.

When the letters are printed, a copy will also be printed for any carbon copy recipient that is allocated against that patient ([see Patients - Note 24. Carbon Copies](#)).

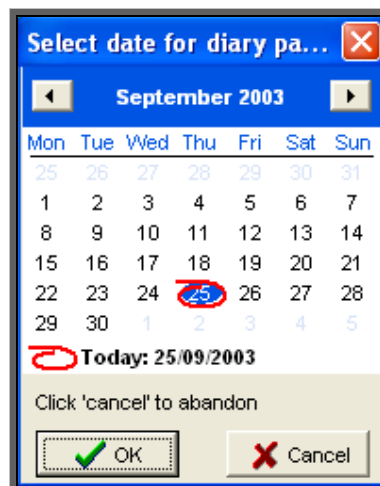
Once the DNA letters have been printed, today's date will be input next to whomever the letter was sent to (i.e. patient, referrer etc) in the *Letters sent to:* box.

22. Diary

The **Diary** option allows you to see all appointments for all Clinicians on a given day and to make new appointments. The **Diary** screen cannot be used for cancelling appointments or updating appointments.

Menu: **Appointments – Current – Diary**

You will be asked which date in the diary you would like to go to. The date will default to today's date, but select an alternate date if required.




The diary page will be divided into intervals based on the default length of your appointments (as defined in your system parameters – see Utilities - Note 38. Choices - System).


If your system default is set to 15 minutes and you have made an appointment for a patient of 30 minutes, their name will appear twice i.e. on each 15 min slot that covers the 30 minute appointment.

11/09/2000	09:15	MR F BLOGGS	
11/09/2000	09:30	MR K BLOGGS	
11/09/2000	09:45		
11/09/2000	10:00	MRS S NICHOLSON	MR F BLOGGS
11/09/2000	10:15		
11/09/2000	10:30	MISS T SMITH	
11/09/2000	10:45		MR J SMYTHE
11/09/2000	11:00	MR J KING	
11/09/2000	11:15	MR J KING	MR J BROWN
11/09/2000	11:30	MISS J WREN	
11/09/2000	11:45		MISS J DUTTON
11/09/2000	12:00	MRS E BUTCHER	
11/09/2000	12:15		MR J DOE
11/09/2000	12:30		
11/09/2000	12:45		
11/09/2000	13:00		
11/09/2000	13:15		

Mr J King has a 30 minute appointment (11.00 – 11.30)

This feature gives you the ability to see at a glance where there are available appointments throughout the day.

To move to another diary date click on the ‘arrow’ icon  (or Goto) and enter the new date.

To print the diary information for the day you have on screen, click on the ‘print’ icon  (or File, Print).



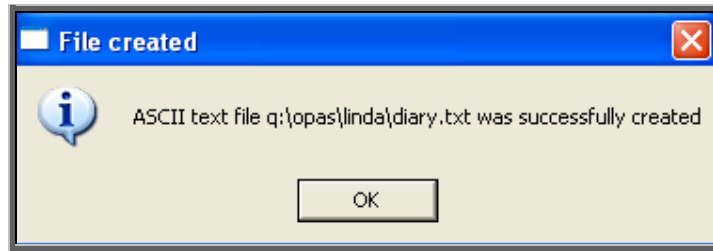
You have the option to print the report or send to a file for exporting into Lotus 123 or MS Excel

Printer

The report will be sent to the printer. You will then have the option to re-select Printer or File. Make another selection or press **Esc** again to return to the menu.

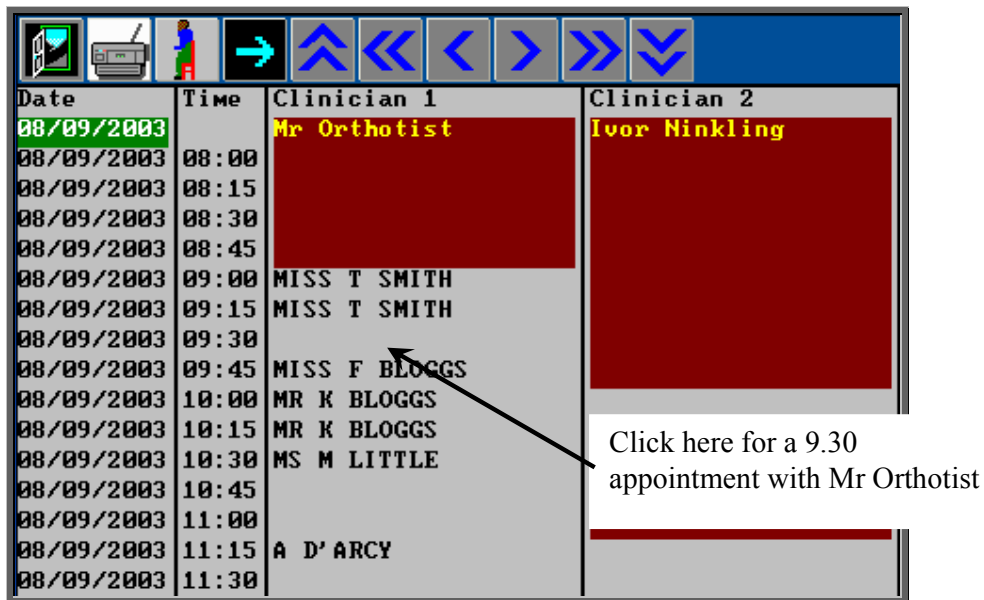
File


A comma separated variable file will be created called **diary.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



Making manual appointments via the Diary screen.

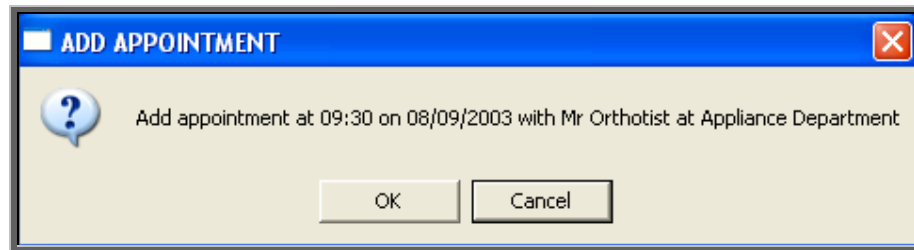
You will be able to see which appointments have been allocated, as these will contain the patient's name. The red area of the screen represents times outside the clinic hours, whereas the grey area is available for making appointments. Unlike making an appointment in the **Session** screen, you **cannot** make appointments in the **Diary** screen that are outside the clinic hours.



To make an appointment, click on the 'appointment' icon  (or **A**ppoint), and then click with the mouse by the slot you wish to take.

If you need to take more than one slot (i.e. a half hour appointment) click on the first slot as you will be able to change the length in the **Appointment** screen. The

following prompt will appear for you to confirm that you have selected the correct time, Clinician and Clinic. Click on OK to continue.



You will then be taken into the **Appointment** screen to fill out the details of the appointment. The fields below in red **must** be completed. The other fields are optional.

Duration will default to your standard appointment length (as set up in **Utilities – Choices – System**) but can be changed to the length of appointment required

Full enter Y if this is a fully booked appointment. You can control what defaults into this field using the default screen (**Utilities - Choices - Defaults**)

Partial enter Y if this is a partially booked appointment. NB. if you enter Y in the *Full* field, N will automatically default into the *Partial* field and visa versa

Patient select the patient from the pop-up list

Order if the appointment relates to an order that has been entered on OPAS then the order number can be entered here. If you know that there is an order, but cannot remember the order number, press the **Tab** key to see a pop-up list of all the orders.

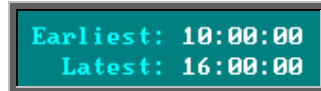
No	Hospital No
C00219	ABC23456
G00220	ABC23456
G00221	786756
G00222	AH280965
G00223	776655
G00224	G54367

Move the green cursor into the Hospital No column and type in the patients Hospital number to show the order numbers for that patient.

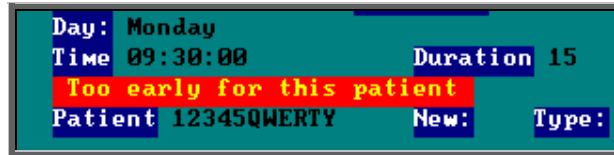
Notes enter the reason for the appointment here.

	What is entered here can appear on the appointment letter to the patient so that they know what the appointment is for.
<i>Comments</i>	additional comments can be entered here. These do not appear on appointment letters but can be printed on clinic lists.
<i>Event</i>	an event can be attached to an appointment. This gives the Clinician the opportunity to attach specific notes after he has seen the patient. This is achieved by answering set questions that relate to the type of appointment. (See Note 18 - Appointments - Auditing appointments)
<i>Letter</i>	will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities - Note 23. Choices - Letters)
<i>Advised</i>	it is this field that controls whether an appointment letter is printed. If you require an appointment letter to be printed, then leave this field blank. If you do not want an appointment letter to be printed, then enter a date here (pressing F2 will insert today's date for you).
<i>New</i>	enter Y if this is a new patient or N if they have been seen before. Alternatively select S for supply F for fit R for review
<i>Type</i>	enter either O for an Out-patient I for an In-patient W for a Walk-in patient
<i>Referral</i>	if this is a new referral, the date of the referral can be entered here. This would then give you the ability to analyse how long it has taken from referral to appointment.
<i>Consref</i>	if the referrer entered on the patient record is not the referrer who referred the patient for this appointment, then an alternate referrer can be selected from the pop-up list (press Tab to show the pop-up list)
<i>Purchaser</i>	if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected.
<i>Episode</i>	the appointment can be attached to a care episode.

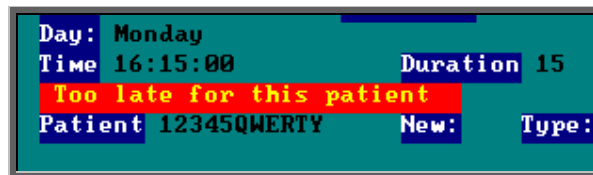
Note: On the **Patient** screen, there are two fields that are connected with making appointments.



When making an appointment manually in the session screen, a warning message will appear if the time given to the patient does not agree with times entered in these fields.



or



Having been given the warning message, if you continue to make the appointment anyway, the message will disappear when you have finished filling in the appointment details.

23. Overview


Menu: Appointments – Current – Overview


This shows a week of clinics, with details of the Clinicians’ clinic times and venues.


Orthotic Patient Administration System			
File Week			
	Monday 11/06/2001	Tuesday 12/06/2001	Wednesday 13/06/2001
Mr Orthotist	09:00 - 14:30 Appliance Department	09:00 - 12:00 Appliance Department	
Mrs Orthotiste	10:00 - 13:00 Paediatric Clinic	10:00 - 17:00 Diabetic Foot Clinic	10:00 - 13:00 Appliance Department

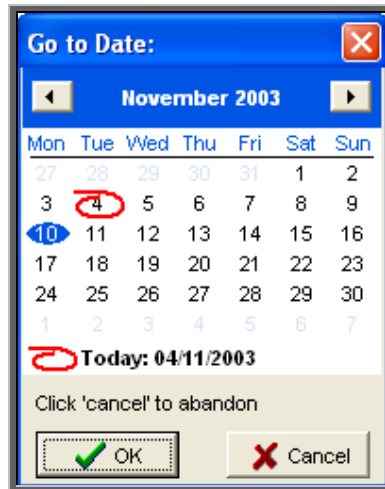
Use the cursor keys (**Right** & **Left**, **Up** & **Down**) to see further columns and rows.

When the Overview option is selected, the week shown will be the current week.

To see the following week, click on the 'plus' icon  (or Week, Increase).

To see the previous week, click on the 'minus' icon  (or Week, Decrease).

To go to a specific week, click on the 'goto' icon  (or Week, Specific) and select the date from the calendar.



To print the overview for the week that you are looking at, click on the 'print' icon




(or File, Print).

24. Clinicians

Menu: Appointments – Clinicians

This option will present a screen for each Clinician showing when their sessions take place (in the *Sessions* table) and the specific dates and times of the clinic dates that have been created for them (in the *Clinics* table). To build clinic dates see [Appointments - Note 3. Creating clinic dates.](#)



Clicking on the 'clinics' icon  or (C)linics) will take you to the **Sessions** screen, where you will be able to access all clinic dates for that Clinician. You will be initially taken to the next session for the Clinician but you can move between clinic dates in the usual way.

25. Reports - Ad hoc

Menu: Reports – Appointments – Ad hoc or

Menu: Appointments – Print – Reports – Ad hoc

The **Ad hoc** Appointment report gives you additional flexibility to report on specific criteria. The **Ad hoc** report will work on current and archived appointments.

OPAS Appointment Reports Selection Criteria Screen

Appointments Archived Current

Venue All One

Outcome All One

Dates All Range

Continue? No Yes

Appointments

Select Archived if the appointments you wish to analyse have been archived

Select Current if the appointments you wish to analyse are current

Venue

Select All if all Venues are to be included

Select One if only one Venue is to be included on the report. Use the space bar on your keyboard to move the highlight from **All** to **One** and press **Enter**. A pop up list will appear for you to make your selection from. Your selection will appear on the screen.

Outcome

Select All if all Outcomes are to be included

Select One if only one Outcome is to be included on the report. Use the space bar on your keyboard to move the highlight from **All** to **One** and press **Enter**. A pop up list will appear for you to make your selection from. Your selection will appear on the screen.

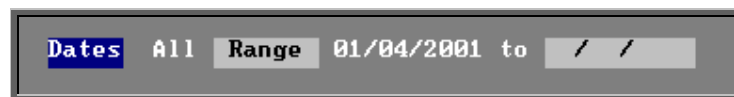
Dates

Select All if you want to report on all archived or current appointments

Select Range if you want to report on a range of dates (this is the usual practice e.g. a month, quarter or year). Use the space bar on your keyboard to move the highlight from **All** to **Range** and press **Enter**. Type the start date in the space provided in the format DD MM YYYY and press **Enter**.



Now type in the from date in the next space.



Continue

Select No if you wish to abandon the **Ad hoc** report screen

Select Yes if you wish OPAS to search for the appointments that match the criteria selected



Once the appointments that match your criteria have been found, a new **Reports** menu will appear for you to make further selections

Activity

The **Activity** report will show for each venue how many attended and how many of those were new patients

Letters

The **Letters** option is no longer available. The menu option will be removed in version 6 as there are much more effective/quicker ways of printing appointment letters.

List

The **List** report will show all the appointments that matched the criteria and include arrived and seen times.

Sessions

The **Sessions** report shows how many sessions (clinics) there have been at each Venue in the date range specified.

26. Reports - Batches

All the batch appointment reports (except the Transport report) work on archived information, so ensure the appointments for the period you wish to report on has been archived ([see Appointments - Note 19. Archiving sessions](#)).

1. Bookings

Menu: Reports – Appointments – Batches – Bookings or

Menu: Appointments – Print – Reports – Batches – Bookings

This report interrogates the information entered in the booking fields.

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

- select the **Purchaser** required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the **Booking** Report.

New User NHS Trust ORTHOTIC DEPARTMENT BOOKING PROGRAMME												
Date	New	Full	Partial	DNAs	HC	PC	F/Ups	Full	Partial	DNAs	HC	PC
02/01/2003							1	1				
16/01/2003							2	2				
27/01/2003							1	1				
29/01/2003							1	1				
06/02/2003							2	2		1		
10/02/2003							1	1				
24/02/2003	1	1					3	3			1	
25/02/2003							1	1				
27/02/2003							2	1				
Total	1	1	0	0	0	0	14	13	0	1	1	0

2. Clinician

Menu: Reports – Appointments – Batches – Clinician or

Menu: Appointments – Print – Reports – Batches – Clinician

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

The screenshot shows a terminal-style interface with a purple background. At the top, the title 'Clinician Activity' is displayed in pink. Below the title, there are four input fields, each with a white background and black text: 'Purchaser', 'Clinician', 'Start Date', and 'End Date'. The 'Purchaser' field is currently empty, while the others contain some faint, illegible text.

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select a Clinician from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Clinician field empty will result in all Clinicians being selected
- enter the Start date of the required date range in the format DD MM YYYY

- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the Clinician Report.

Orthotist	Total	Time	0	1	2	3	4	5	6	Collect
Ben Dover	4	60		4						
Mr B Fitter	2	30		2						
Willie Gofar	4	60		4						
Euan Hussmi	1	15		1						
Ivor Ninkling	7	105		7						
Mr Orthotist	121	1990		116	4	1				4
Mrs Orthotiste	35	585		34	1					2
A N Other	1	15		1						
Andy Pandy	2	30		2						
Grand Total	177	2890	0	171	5	1	0	0	0	6
Count	9									

3. Directorate

Menu: Reports – Appointments – Batches – Directorate or

Menu: Appointments – Print – Reports – Batches – Directorate

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

Directorate Activity

Purchaser []

Directorate: []

Start Date [] **End Date** []

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select a Directorate from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Directorate field empty will result in all directorates being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY

Print 5 records

Screen **Printer** **File**

Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the Directorate Report.

Directorate	Total	Time	%age	0	1	2	3	4	5	6	Collect
Paediatrics	5	75	2.6%		3	2					1
PCT	3	40	1.4%		3						
Trauma & Orthopaedic	169	2775	96.0%		165	3	1				5
Grand Total	177	2890		0	171	5	1	0	0	0	6
Count	3										

New User NHS Trust
 Directorate Appointment Activity
 ALL PURCHASERS
 Start Date: 01/01/2001
 End Date: 30/07/2003

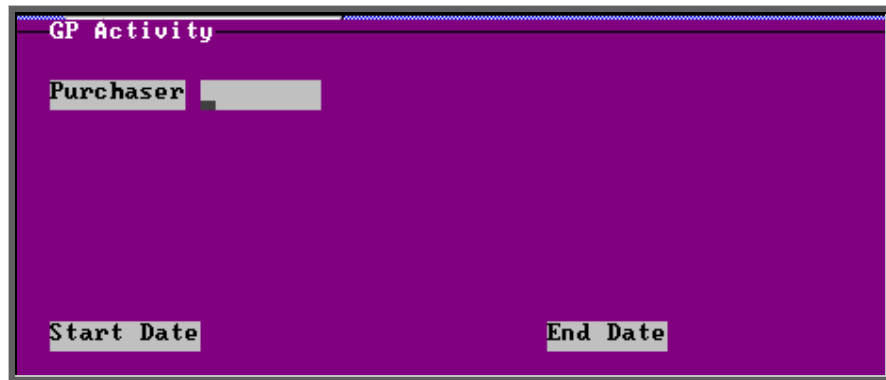
Key :
 0 - No Outcome recorded
 1 - Attended
 2 - Did not Attend
 3 - Could Not Attend
 4 - Collect Only
 5 - Cancelled by Hospital
 6 -

4. GP Activity

Menu: Reports – Appointments – Batches – GP Activity or

Menu: Appointments – Print – Reports – Batches – GP Activity

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.



- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the GP Activity Report.

New User NHS Trust											
GP Appointment Activity Report		Key :									
ALL PURCHASERS		0 - No Outcome recorded									
Start Date : 01/01/2001		1 - Attended									
End Date : 30/07/2003		2 - Did not Attend									
		3 - Could Not Attend									
		4 - Collect Only									
		5 - Cancelled by Hospital									
		6 -									
GP Code	GP Name	Total	Time	0	1	2	3	4	5	6	Collect
G0230753	BENNET RB	95	1650		92	3					
G2313537	WOOLAS KD	1	15		1						
G3291821	LIEBERT LJ	6	90		6						
G3291821	LIEBERT LJ	24	350		24						2
G3305708	BRACE CA	1	15		1						
G3316902	HUSSEIN S	1	15		1						
G3355370	EYRE DH	1	30		1						3
G3399279	WORTHINGTON JRM	1	15		1						
G3399420	PENRICE GJ	1	15		1						
G3408120	DONALDSON TJ	1	15		1						
G8102216	MATTI SK	3	45		3						
G8203801	JONES IP	4	60		4						
G8409872	SCHUM BA	2	20		2						
G8510251	PERKINS PJ	1	15		1						
G8706074	DAVIDSON RG	7	120		7						
G8800576	FLAMAN FA	1	15		1						
G8901446	YOUNG S	16	240		14	1	1				

5. New Patients

Menu: Reports – Appointments – Batches – New Patients or

Menu: Appointments – Print – Reports – Batches – New Patients

This report interrogates the appointment information for new patients only. OPAS knows which appointments are for new patients by looking at the *New* field on the appointment and selecting those with a Y entered.

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

New Patients

Purchaser

Start Date **End Date**

By

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- enter how the report is to be sorted **By**. Available options appearing in the pop-up box are Clinician, Directorate, Referrer or Venue



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the **New Patient** Report sorted by Referrer.

New Patient Appointments by Consultant 01/01/2003 - 31/03/2003							
Consultant	Total	Attended CP	Attended IP	Attended Other	DNA CP	DNA IP	DNA Other
Mr Surgeon	3	1		1	1		
ANOther	1						
Mr N Parrish	2	2					
mr smith	1				1		

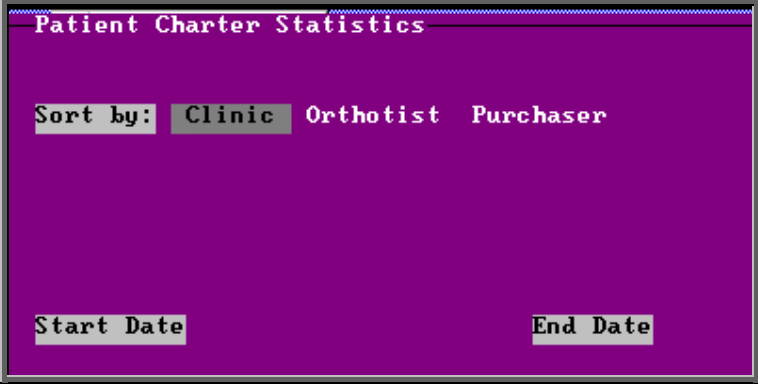
6. Patient Charter Stats

Menu: Reports – Appointments – Batches – Patient Charter Stats or

Menu: Appointments – Print – Reports – Batches – Patient Charter Stats

This report will analyse the log times that are entered against an appointment, to calculate how many of your patients were seen within half an hour of their appointment time (or seen within half an hour of arrival if they arrived after their appointment time).

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.



- select how you wish the information to be displayed i.e. by Clinic, Clinician or Purchaser
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the Patient Charter Stats Report.

Patient Charter Statistics
By Orthotist
11/12/1900 - 11/12/2000

Orthotist	Under 30	Under 60	Over 60	Rejects
M Orthotist	71	76	57	
Mrs Orthotiste	6	5	7	
Ivor Ninkling	1	3		
M B Fitter	1		2	
Ben Dover	4			
Total	83	84	66	0

Number of patients seen within 30 minutes of their appointment time

Number of patients seen within 1 hour of their appointment time but not within 30 minutes

Number of patients seen after 1 hour of their appointment time

Those appointments that do not have 'seen' times logged

7. Referrers

Menu: Reports – Appointments – Batches – Referrers or

Menu: Appointments – Print – Reports – Batches – Referrers

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

Referrer Activity

Purchaser

Referrer

Start Date **End Date**

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select a Referrer from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Referrer field empty will result in all referrers being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the Referrer Report.

Consultant	Total	Time	%age	0	1	2	3	4	5	6	Collect
A N Other	5	75	2.6%		3	2					1
Mr N Parrish	3	40	1.4%		3						
mr smith	5	90	3.1%		5						
Mr Surgeon	164	2685	92.9%		160	3	1				5
Grand Total	177	2890		0	171	5	1	0	0	0	6
Count	4										

8. Reviews

Menu: Reports – Appointments – Batches – Reviews or

Menu: Appointments – Print – Reports – Batches – Reviews

This report interrogates the appointment information for review patients only. OPAS knows which appointments are for review patients by looking at the *New* field on the appointment and selecting those with a N entered.

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY
- enter how the report is to be sorted By. Available options appearing in the pop-up box are Clinician, Directorate, Referrer or Venue

Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the **Reviews** Report sorted by Directorate.

Review Appointments by Directorate 01/01/2003 - 31/03/2003							
Directorate	Total	Attended CP	Attended IP	Attended Other	DNA CP	DNA IP	DNA Other
Paediatrics	2	1			1		
PCT	2	2					
Trauma & Orthopaedic	15	13			1		

9. Transport

Menu: Reports – Appointments – Batches – Transport or

Menu: Appointments – Print – Reports – Batches – Transport

Unlike the other batch appointment reports, this report will only look at **current** appointments, as the purpose of this report is to see current bookings that have been made.

- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY

Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the Transport Report

Transport Bookings 1/9/2003 - 30/9/2003					
Clinic	Date	Time	Patient	Booked:	By
Appliance Department	29/09/2003	10:15:00	TBVP000010	25/09/2003	LINDA

10. Uncollected

Menu: Reports – Appointments – Batches – Uncollected or

Menu: Appointments – Print – Reports – Batches – Uncollected

This report has two functions. Firstly it will report on those orders where the goods have not been collected, and then secondly, give you the option to send a reminder collection letter to those patients. OPAS determines which orders have not been collected by looking for orders where the ACO field is C and where the goods have been delivered but not yet supplied.

- select the Clinic required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Clinic field empty will result in all clinics being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the **Uncollected** Report.

New User NHS Trust Unclaimed Collections 01/01/2002 to 27/04/2003			
Clinic:	Hosp No	Patient Name	Received
Appliance Department	G0418296	J DALNEY	27/04/2003
New Clinic	G3355370	D EYRE	23/04/2003

Once the report has been produced (either to the screen or printer), the **Screen**, **Printer**, **File** prompt appears again. Press **Esc** and the following prompt will appear.

(If you do not want the report, but do want to produce reminder collection letters press **Esc** when the **Screen**, **Printer**, **File** prompt appears for the first time.)



Click on **Yes** if you wish to print reminders letters for those patients who have not collected their goods. Otherwise click on **No**.

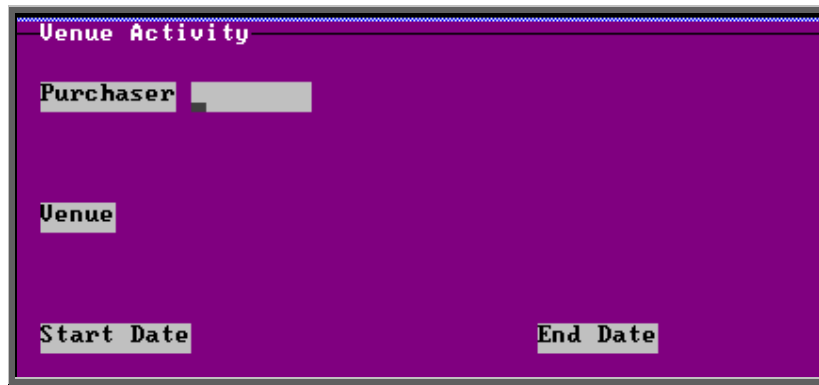
Note: If you wish to edit the wording of the reminder collection letter the template is held within **Utilities – Choices – Letters** and is called **Uncoll**.

11. Venues

Menu: **Reports – Appointments – Batches – Venues** or

Menu: **Appointments – Print – Reports – Batches – Venues**

The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.



- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select a Venue from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Venue field empty will result in all venues being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

Below is an example of the Venues Report.

Venue	Total	Time	0	1	2	3	4	5	6	Collect
A N Other Clinic	1	15		1						
Appliance Department	131	2005		127	3	1				3
LINDAS SPECIAL CLINIC	6	90		6						
New Clinic	23	540		22	1					3
Test	6	90		6						
TEST AREA	2	30		2						
testing	7	105		6	1					
Yet Another Test	1	15		1						
Grand Total	177	2890	0	171	5	1	0	0	0	6

Count 8

